

The Perfect Trip

What are the pain points of
business travel – and how can
we eliminate them?

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Introduction

Business travel can be exciting and enriching; stressful and exhausting. Business travelers experience a range of emotions and experiences. Over the course of a year—and even in a single trip—a business traveler can experience the triumph of a completed sale and the frustration of a lost suitcase.

What business travelers are in search of is a *perfect trip*.

Is the perfect business trip a fantasy? Or is it an aspiration the industry can work to achieve through innovation, out-of-the-box thinking, and a renewed focus on customer service?

Based on a survey of corporate travel managers in the United States and Canada, this study examines (1) **pain points** faced by managed travel programs and (2) **emerging innovations** that can help the industry overcome them. It addresses a number of topics including:

- **Booking and NDC:** To what extent have travel programs adopted New Distribution Capability (NDC)? What are the barriers to adoption? When it comes to Online Booking Tools (OBTs), which features do travel buyers value most?
- **Travel Management Companies (TMCs):** What are the biggest pain points companies experience with their TMC? Which TMC capabilities do buyers value most? How many travel programs are considering changing TMCs within the next year?
- **Small meetings:** Do “managed” travel and meetings programs work together – or are they siloed from each other? Do companies plan “small

meetings” within a managed program – or on an ad-hoc basis? What are the greatest challenges companies face with small meetings?

- **Payment and expense management:** What are the biggest pain points travel programs face when it comes to expense reporting and corporate cards? Can emerging innovations simplify expense reporting and reconciliation?

Executive Summary

This study is about the business travel industry’s journey toward achieving the “perfect trip.” It examines (1) pain points and barriers within managed travel and (2) emerging innovations that have the potential to overcome these barriers. An online survey was conducted of 166 travel managers in the U.S. and Canada.

The five most notable findings are:

- 1) Travel programs experience friction in different areas.
- 2) Travel buyers blame intermediaries for NDC’s slow roll-out.
- 3) Buyers want better integration between TMCs and OBTs.
- 4) Small meetings are often unmanaged.
- 5) Buyers are interested in features that streamline payment and expense processes.

Key Highlights

- **Travel programs experience friction in different areas.** At least half of travel programs experience at least some friction when it comes to booking

guest travel online (57%), managing travel disruptions (55%), managing expense reports (50%), and TMC servicing (50%).

- **Travel programs continue to struggle with “leakage.”** These are bookings made outside of “managed” channels such as a TMC or an OBT. Most travel managers (67%) say their program’s **air leakage** grew (19%) or remained the same (48%) over the past year. A larger number (81%) say their **hotel leakage** grew (24%) or remained the same (57%).
- **New Distribution Capability (NDC) continues to face a slow road to adoption.** On average, travel buyers estimate NDC bookings currently account for only 6.3% of their company’s overall air bookings. More than one-third of buyers (37%) say their program is not making any NDC bookings. An additional one-fifth (22%) say NDC bookings account for less than 10% of their program’s overall air bookings.
- **Buyers blame intermediaries for NDC’s slow roll-out.** NDC “non-adopters”¹ were asked to indicate the **single greatest reason** why NDC has not gained traction within their program. Most of these buyers (54%) say there is not enough NDC content available through their OBT (26%) or their TMC cannot adequately support NDC (28%). Only 17% say they have chosen to suppress NDC content or give preference to EDIFACT bookings.
- **Even when OBTs have NDC content, they do not have key features to support these bookings.** For instance, only 13% of buyers say their OBT supports self-service changes and cancellations for NDC bookings. Only

¹ Note: These include buyers who indicate their company is not making any NDC bookings – or NDC bookings account for less than 10% of their overall air bookings

17% says their OBT allows employees to access free or discounted seats based on their loyalty status. Only 16% say their OBT can determine Lowest Logical Fares across NDC and EDIFACT fares.

- **Travel programs experience a number of pain points with their corporate Online Booking Tool (OBT).** These include the ability to manage exchanges and cancellations (64%), ability to manage unused tickets (54%), limited access to NDC fares (46%), access to comprehensive global content (44%), and bookings for unprofiled guest travelers (43%).
- **A decent number of travel programs are open to switching TMCs within the next year.** More than one-quarter (28%) are likely to switch (16%) or actively considering it (12%). An additional one-third (30%) say they “might consider doing it, might not.” Only two in five (39%) say they would not consider switching.
- **Travel buyers say various innovations are important when it comes to TMC servicing.** Asked to pick the three most important (out of nine possible), they commonly say proactive disruption management (54%), risk management/duty of care (46%), and the ability to easily service NDC bookings (35%).
- **Travel buyers want better integration between TMCs and OBTs.** A large majority of buyers (63%) say better integration between customer service and booking platforms is one of the service improvements that would enhance their travelers’ experience.

- **Travel and meetings programs are often siloed from each other.** Even though travel managers are often involved with meetings, this does not mean the two programs are seamlessly integrated. Almost half of buyers (46%) say their company's travel and meetings programs are "mostly siloed from each other." Only 14% say they are "mostly integrated" with each other.
- **Small meetings are often unmanaged.** Most buyers (53%) say small meetings are typically "organized outside of a managed program" at their company. Only one in five (21%) say they are "typically organized within a managed program."
- **Buyers identify a number of challenges with managing travel for meetings at their company.** These include budget uncertainty and management (45%), coordinating attendees (42%), time-consuming research (40%), and making and managing travel bookings (37%).
- **Buyers value different features of meetings planning software – particularly for small meetings.** They were asked if various innovations are important. Important features include a "centralized platform" for both travel and meetings (62%), destination recommendations based on attendee origins (40%), and tools to personalize the attendee experience (36%).
- **Buyers are interested in features that streamline payment and expense processes.** They were asked to indicate up to three innovations in expense reporting and payment that they are most interested in offering through their program. They commonly say automated receipt capture and matching (55%), seamless integration with accounting software (39%), and

an all-in-one card, travel, and expense integration with booking systems (38%).

Methodology

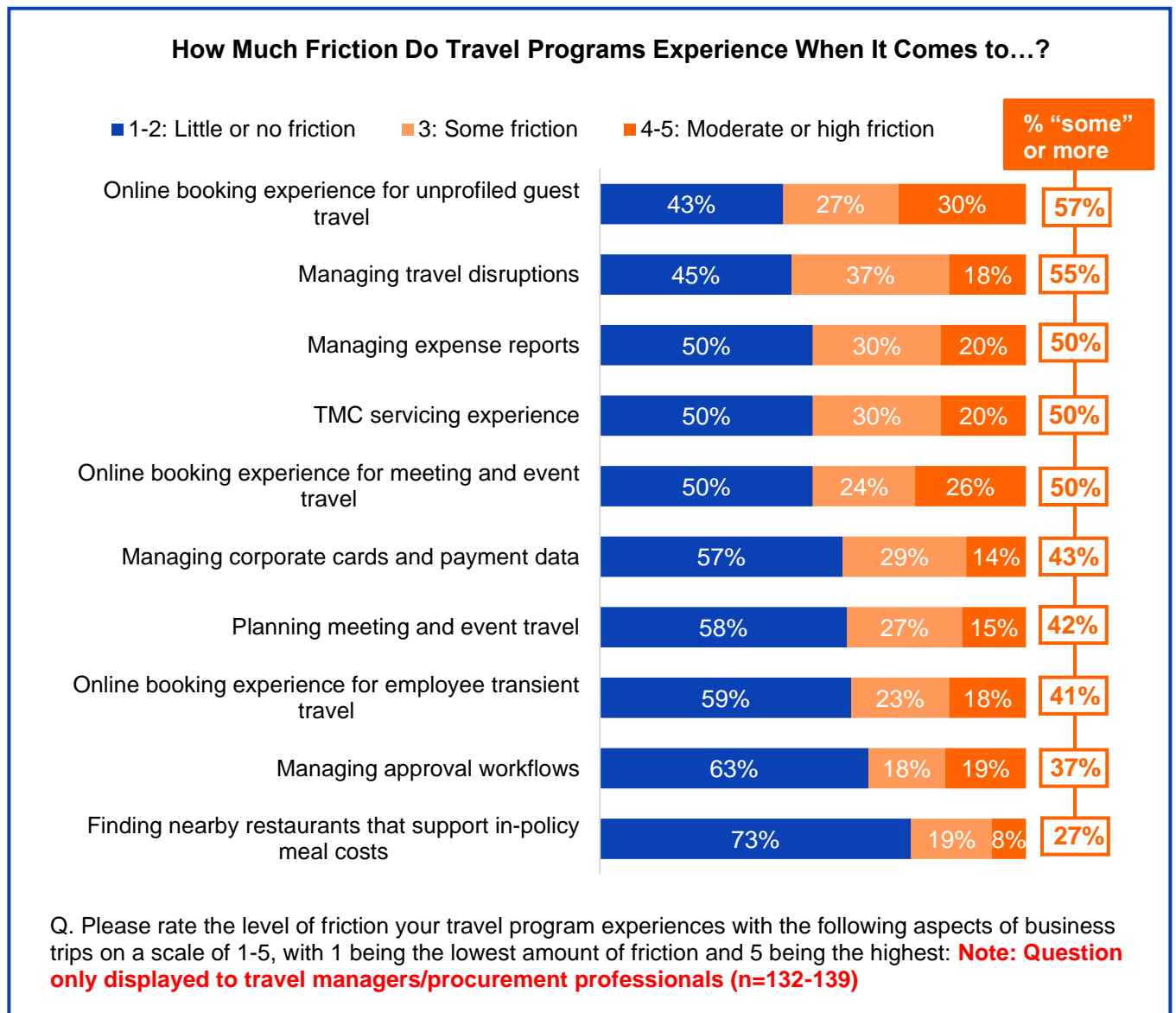
An online survey was conducted of U.S.- and Canada-based travel managers. Fielding took place between March 4, 2025 and March 15, 2025.

An email invitation was sent to 2,829 travel managers including current and former members of GBTA. Of these, 195 completed at least one question, for a response rate of 6.9%. Of those who responded, 166 qualified because they (1) are based in the U.S. or Canada and (2) are “involved with managing or procuring travel on behalf of [their] company.” Of those who qualified, 116 completed the survey including 102 in the United States and 14 in Canada.

Business Travel Challenges

Business travel drives business outcomes. Yet it also creates friction – for employees and the travel managers who support them.

- **Travel programs experience friction in different areas.** Travel managers were asked to rate the level of “friction” experienced with key aspects of their program. They experience the most friction when it comes to booking guest travel and managing travel disruptions.



Guest travel is the top pain point

- **The top pain point:** Employees travel for work. However, they are not the only ones. “Guests” also travel. These include job candidates, clients, board members, and college students. Organizations book, pay for, and “manage” travel for guests even though they are not employees. Booking guest trips can cause friction. In fact, it is the single greatest source of friction – with three in five travel programs (57%) rating the level of friction experienced at their company a three or higher on a five-point scale.

There are two ways that guest bookings are typically made within a managed travel program:

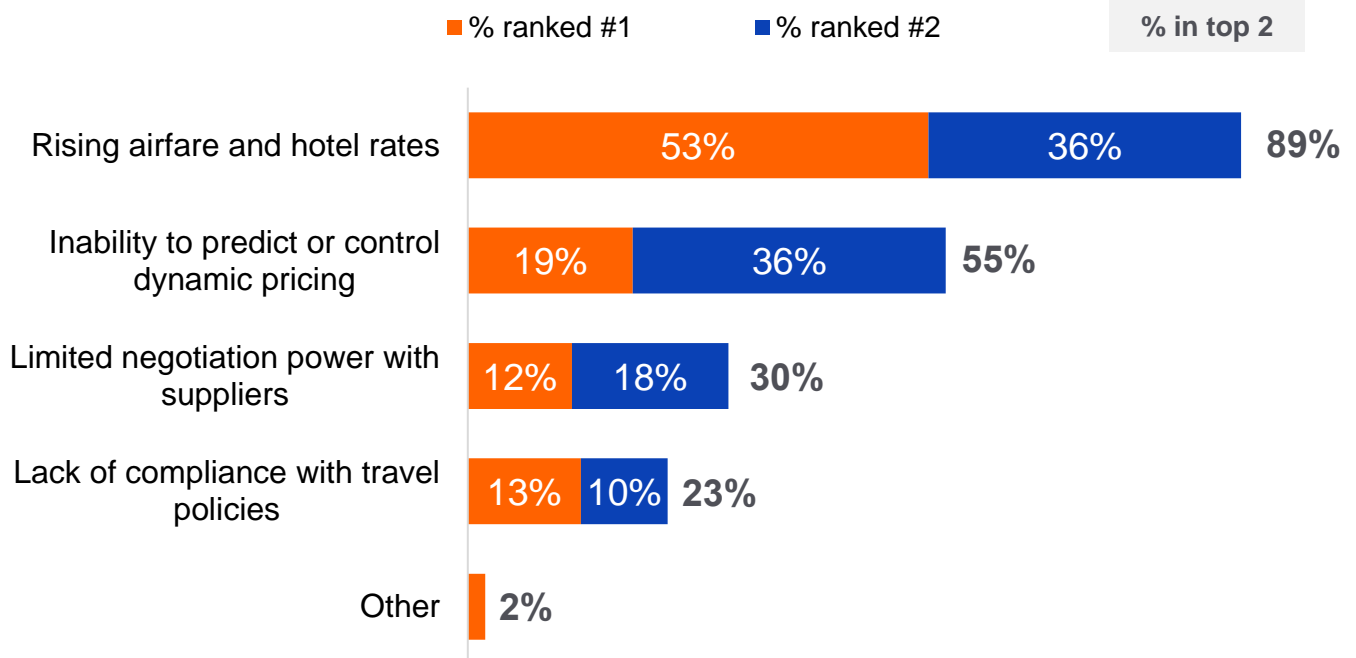
- **TMC-assisted:** An employee at the company instructs the TMC to assist a guest with their reservation. The TMC is familiar with the company’s policies for guest travel. A travel agent connects with the guest and helps them book – on the phone or through email. However, these bookings require a travel agent – and incur high fees as a result.
- **Guest booking feature:** Some corporate booking tools (OBTs) have a “guest booking” feature that allows employees to make reservations on behalf of guests. Certain types of employees (such as HR coordinators and executive assistants) can spend a significant amount of time booking travel for guests. In recent years, companies have introduced tools to allow guests to “self-book.” One example is Juno. These tools have the potential to save significant time.

In addition to general pain points, buyers were asked to rank challenges they face specifically when it comes to *managing travel costs*. Two points stand out when analyzing these results:

- **Nine in 10 buyers (89%) say rising airfares and hotel rates is one of the two greatest pain points they face when it comes to managing travel costs.** This includes more than half (53%) who say it is the *single greatest* pain point.

- **Surprisingly, the current negotiation climate is not viewed as a major challenge.** Travel programs face a difficult negotiation climate. Major airlines have removed longstanding discounts for corporate customers. Hotels are also driving a tough bargain – limiting Last Room Availability (LRA) and pushing customers to dynamic discounts. Yet, only 30% of buyers say limited negotiation power with suppliers is one of the two greatest challenges they face when it comes to managing travel costs.

How Do Buyers Rank Various Challenges With Managing Travel Costs?



Q. How would you rank the following challenges in managing travel costs? **Please drag and drop each option so 1 is the greatest challenge (n=129)**

Rising travel prices: perception and reality

Over the past two years, travel prices have stabilized. However, they are still perceived to be rising.

- **The perception:** Travel prices are *perceived* to be rising. Buyers were asked rank various challenges they face when managing travel costs. Rising costs is the top challenge. Almost nine in 10 buyers (89%) say rising airfares and hotel costs is one of the two greatest challenges they face. This includes more than half (53%) who rank it as the single greatest challenge.
- **The reality:** The *reality* is that travel prices have *stabilized*. Last year, the average U.S. domestic airfare was \$384, according to the U.S. Bureau of Transportation Statistics. This represents a 0.6% increase from the previous year. This is lower than the average increase (1.6%) over the past 30 years. More importantly, this is lower than the overall rate of inflation. As a result, the “real” cost of flying *actually decreased*. When adjusted for inflation, U.S. domestic airfares fell 2.3% last year. This marked the second straight year when airfares declined – after falling 3.1% the previous year when adjusted for inflation. A similar trend was seen with hotels. The Average Daily Rate (ADR) grew only 1.7% in the U.S. last year, lower than the overall rate of inflation, according to STR.

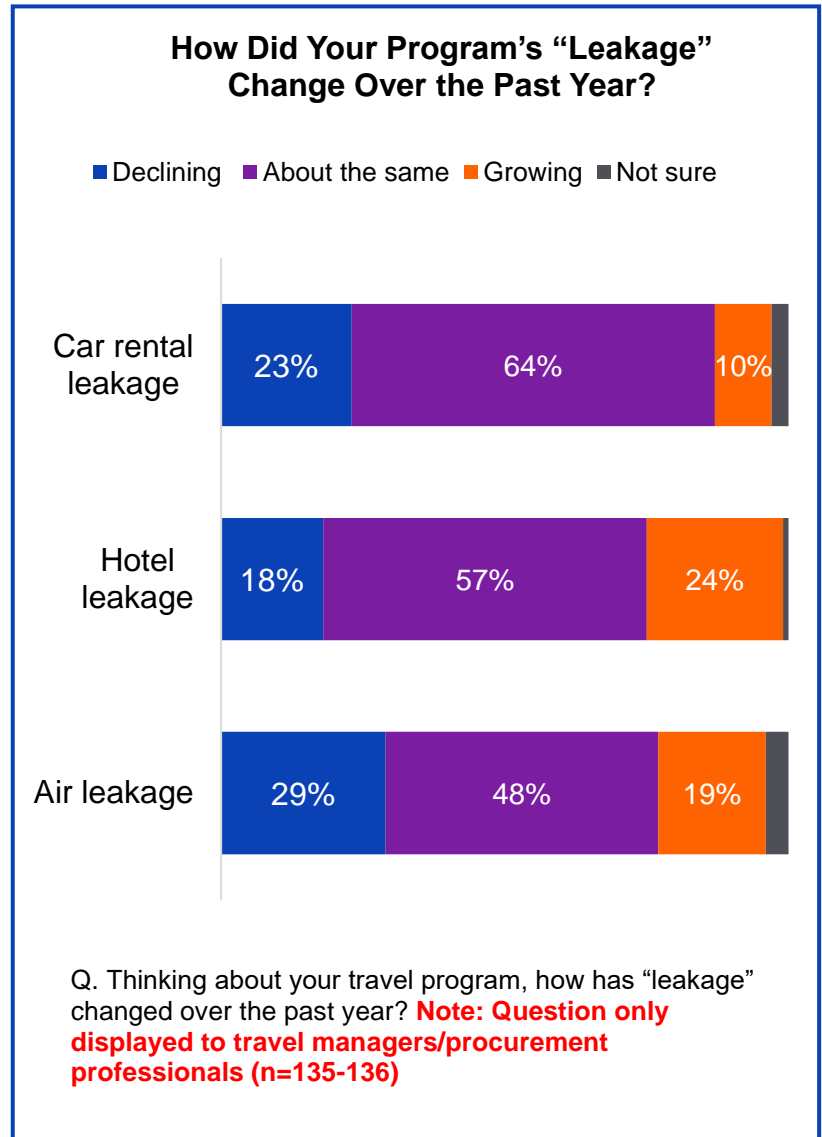
Sources: U.S. Bureau of Transportation Statistics. “Annual U.S. Domestic Average Itinerary Fare in Current and Constant Dollars.” U.S. Department of Transportation. <https://www.bts.gov/content/annual-us-domestic-average-itinerary-fare-current-and-constant-dollars>

STR. “U.S. hotel commentary - December 2024.” 3 February 2025. <https://str.com/data-insights-blog/us-hotel-commentary-december-2024>

Travel programs continue to struggle with “leakage.” These are bookings made outside of “managed” channels such as a TMC or an OBT.

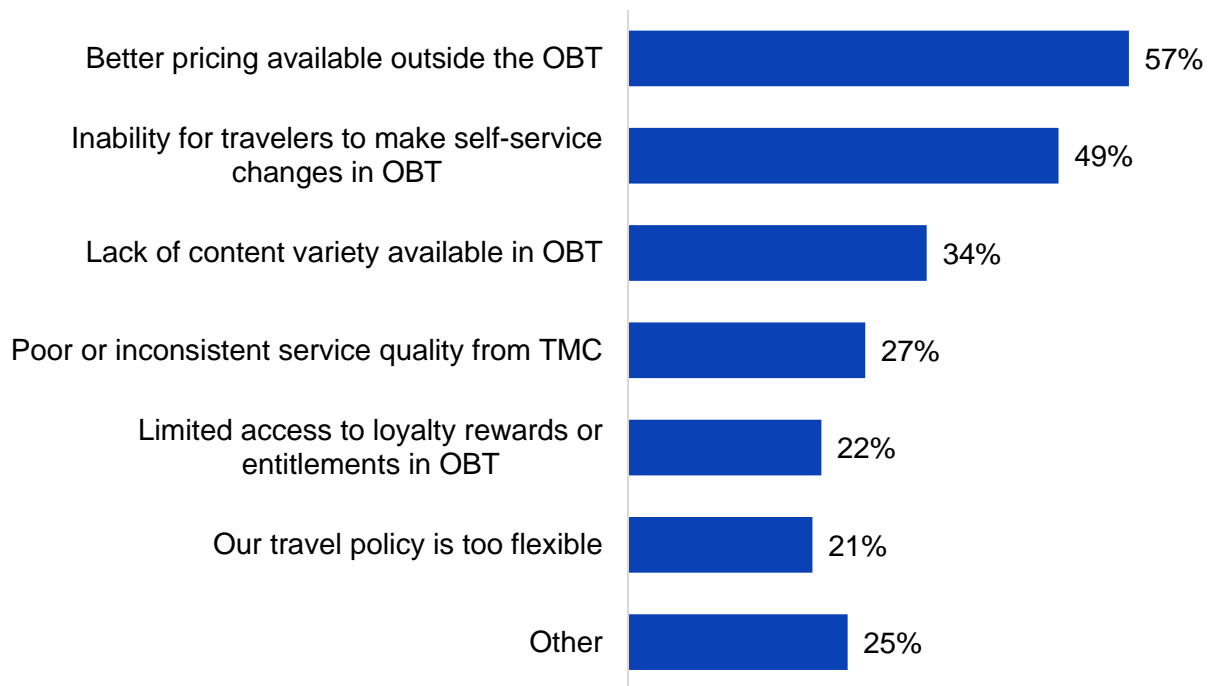
For two years, air “leakage” was a major industry topic. Major airlines removed certain types of content (i.e., fares) from traditional EDIFACT-based channels—commonly used by third-party intermediaries to access them—in an effort to encourage adoption of New Distribution Capability (NDC). However, travel programs struggled to book NDC content—for various reasons—and employees sometimes had to book outside of “managed” channels.

- **Yet even as content has returned to EDIFACT, air leakage remains a challenge.** Only 29% of buyers say their company's air leakage declined over the past year. A large majority (67%) say it remained the same (48%) or even increased (19%).
- **Hotel leakage is an even bigger challenge.** Only 18% of buyers say their program's hotel leakage declined over the past year. A larger number (81%) say it grew (24%) or remained the same (47%).



- **Buyers point to various reasons for leakage in their program.** They were asked to pick the three top reasons. The most common reasons are that employees find better pricing outside of the OBT (57%) and are unable to "self-service" (cancel or change) bookings through the OBT (49%).

What are the Top Drivers of Leakage in Your Travel Program? *up to three answers allowed*



Q. What are the top drivers of leakage in your travel program? **Please select up to three (n=134).**

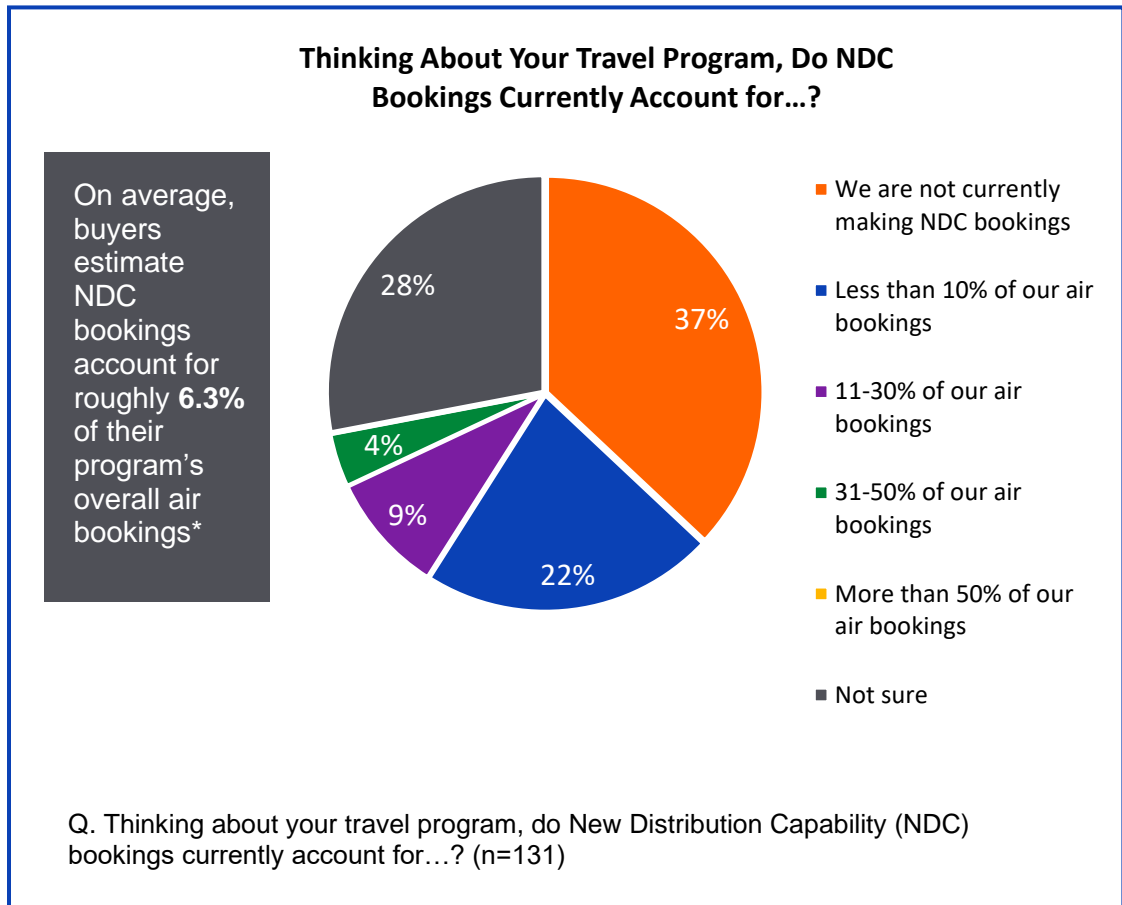
Booking and New Distribution Capability (NDC)

IATA's New Distribution Capability (NDC) will revolutionize how third-party intermediaries—such as TMCs and OBTs—access fares. For corporate buyers, it can drive savings and a better shopping experience.

- **Despite NDC's promise, it continues to face a slow road to adoption.** On average, travel buyers estimate NDC bookings currently account for only 6.3%² of their company's overall air bookings. More than one-third of buyers (37%) say their program is not making any NDC bookings. An additional one-fifth (22%) say NDC bookings account for less than 10% of

² Note: This is an estimated average calculated from the midpoints of ranges

their program's overall air bookings. One caveat, however, is that buyers might not actually know the prevalence of NDC within their program (see next page).



Why is there an NDC “disconnect?”

- **Survey shows little NDC traction:** Survey respondents report little traction with NDC. More than one-third of buyers (37%) say their program is not making any NDC bookings. On average, buyers estimate NDC accounts for only 6.3% of its overall air bookings.
- **Other data sources tell a different story:** While GBTA’s survey shows little progress, other data sources tell a different story. The company ARC is a financial services firm that facilitates payment between airlines and travel agencies. ARC collects data about the vast majority of air bookings made through U.S.-based TMCs. On average, ARC data show that NDC bookings accounted for roughly 20% of air bookings made through U.S. travel agencies last November, as reported in a January, 2025, article in the *Company Dime*.

Why is there such a disconnect? It is not clear. However, it is worth exploring three possible explanations:

- **Leisure leads the way:** The ARC data appears to include leisure bookings made through intermediaries. It is possible that NDC bookings are higher at leisure-focused travel agencies than corporate TMCs.
- **Lack of travel manager awareness:** Travel managers might not actually know the prevalence of NDC within their program. Employees could be making NDC bookings without their knowledge. As a result, travel managers might think NDC bookings are less common than they actually are. What reinforces this possibility is that more than one-quarter of buyers surveyed (28%) admit they do not know how many NDC bookings their company is actually making.
- **Large programs lead the way:** The survey average is taken among travel programs. Large and small programs are given equal weight. The ARC average is taken among bookings. If large programs are more likely to adopt NDC – and small programs are less likely to adopt it – this could explain the disconnect. However, this does not appear to be the case. In the GBTA survey, large programs are actually more likely to say they are **not** making NDC bookings (see next page).

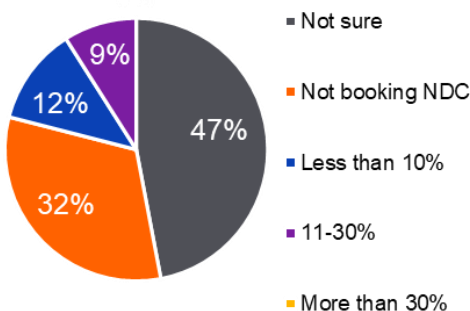
Sources: Source: Jonas, David. “NDC Sputters, But It’s Still The Future.” *The Company Dime*, January 2, 2025. Accessed April 22, 2025. <https://www.thecompanydime.com/ndc-new-distribution-capability-sputters-future/>

- **NDC adoption varies by program size.** Half of buyers (47%) at small programs are not sure if their program is making NDC bookings. Small programs often rely on their TMC to configure their OBT. As a result, they might not fully understand the types of content offered. **Large programs are most likely to say they are not making *any* NDC bookings.**

Thinking About Your Travel Program, Do NDC Bookings Currently Account for...? *by annual company travel spend*

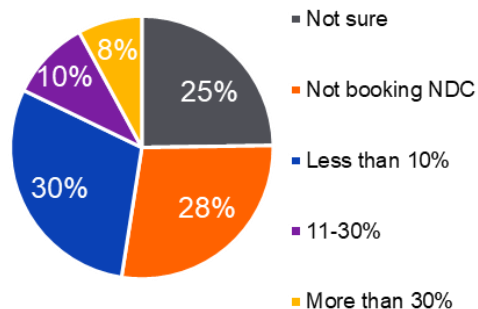
Less than \$10 million (n=34)

Estimated average: 4.7%



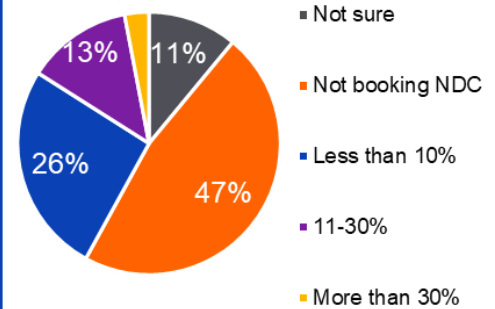
\$10 million to less than \$30 million (n=40)

Estimated average: 8.5%



\$30 million or more (n=38)

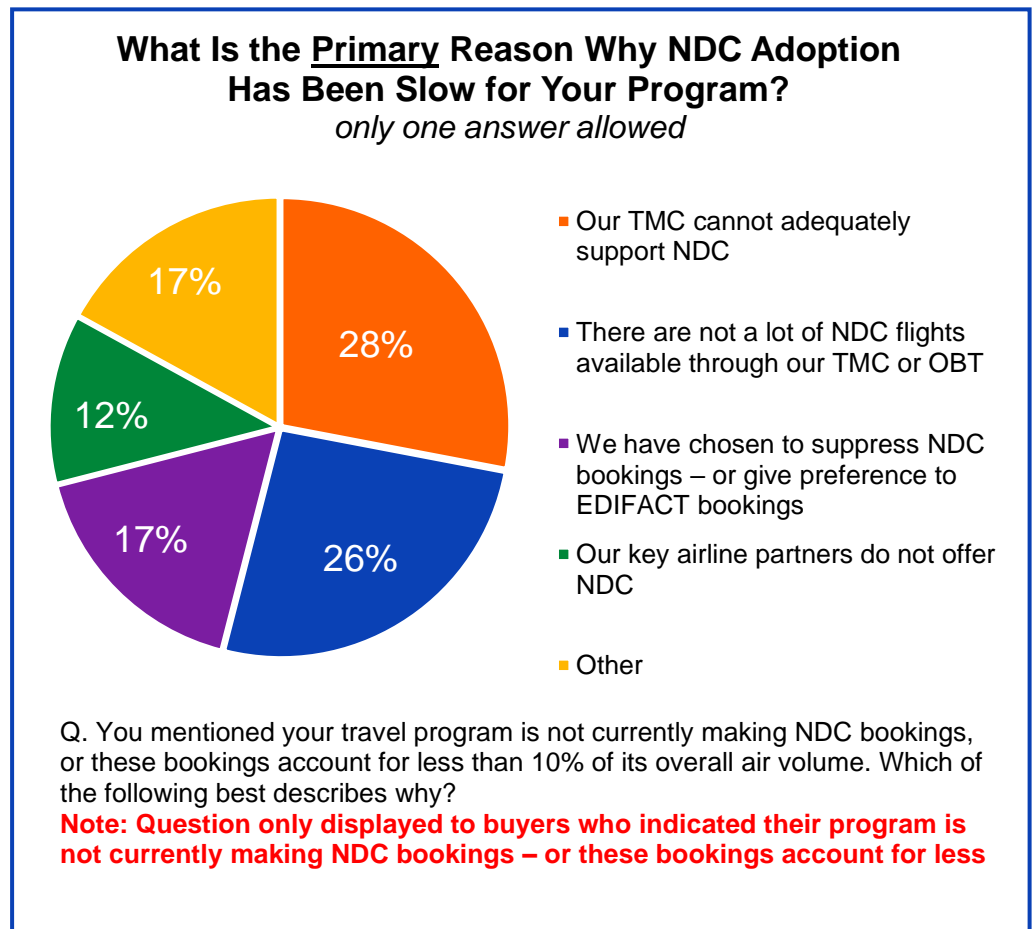
Estimated average: 5.9%



Q. Thinking about your travel program, do New Distribution Capability (NDC) bookings currently account for...?

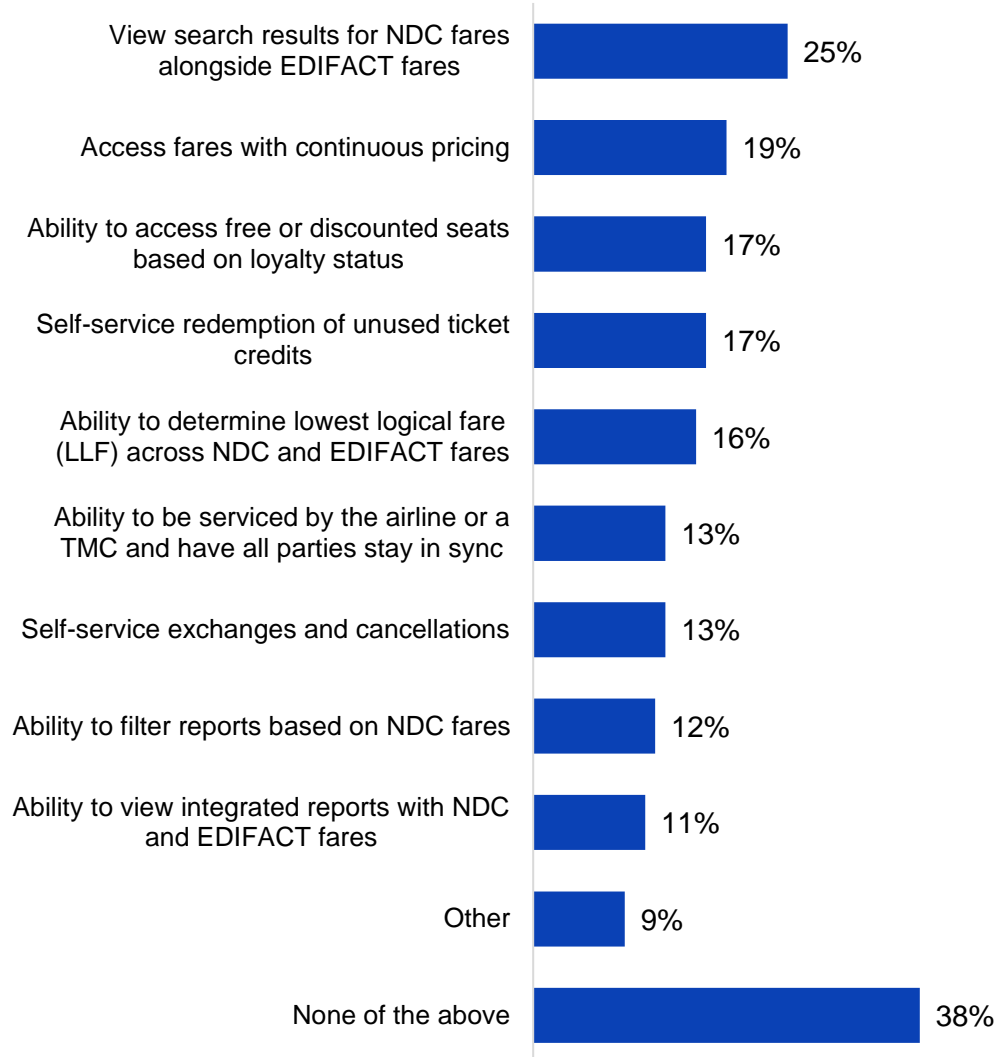
Why has NDC adoption been slow? While some buyers have chosen not to adopt it, most blame intermediaries. Buyers who said their program has not adopted NDC—or NDC accounts for less than 10% of their air bookings—were asked to indicate the single biggest reason why.

- **Most of these buyers (54%) say there is not enough NDC content available through their OBT (26%) or their TMC cannot adequately support NDC (28%).** Only 17% say they have chosen to suppress NDC content or give preference to EDIFACT.



- **Even when OBTs have NDC content, they do not have key features to support these bookings.** Only 13% of buyers say their OBT supports self-service changes and cancellations for NDC bookings. Only 17% says their OBT allows employees to access free or discounted seats based on their loyalty status.

Does Company's OBT Offer Features to Support NDC? *multiple answers allowed*



Q. What capabilities are currently available in your Online Booking Tool to support NDC (New Distribution Capability)?

Please select all that apply (n=122).

NDC is here – but are OBTs ready?

NDC has arrived: NDC has arrived at scale. Last November, more than 800 U.S.-based TMCs offered NDC content, according to a January, 2025 article in the *Company Dime*.

However, OBTs do not have key features needed to fully realize the benefits of these bookings.

- **Servicing:** One well-documented challenge is servicing. Intermediaries (i.e., TMCs and OBTs) can access NDC content through APIs that allow them to connect directly to an airline's system. However, many TMCs and OBTs have found it difficult to automate servicing workflows given the variation that exists in the way that different airlines have implemented NDC. Only 13% say their OBT supports self-service changes or cancellations for NDC bookings. And, only 13% say NDC bookings can be serviced by either an airline or TMC with all parties staying in sync.
- **Loyalty personalization:** NDC can allow “personalized” offers based on loyalty status. Airlines can recognize an employee's loyalty status within the OBT at the time of booking. However, only 17% say their OBT currently allows employees to access free or discounted seats based on loyalty status.
- **“Bundled” fares and lowest-logical-fares:** NDC will allow “customized bundles.” In other words, airlines can bundle base fares with various add-ons or amenities (such as checked bags) allowed by a company's travel policy. However, this presents a challenge when companies have Lowest Logical Fare (LLF) policies. It can be difficult to make apples-to-apples comparisons. For instance, one offer might only include a base fare. Another one might cost more – but also include two checked bags. In this scenario, it can be difficult to understand which is “lowest logical.” Only 16% of buyers say their OBT can apply LLF policies to NDC “bundled” fares.
- **Reporting:** Only 12% of buyers say their OBT allows them to filter reports based on NDC fares. This would allow them to compare NDC bookings against EDIFACT bookings – and decide which is a better value.

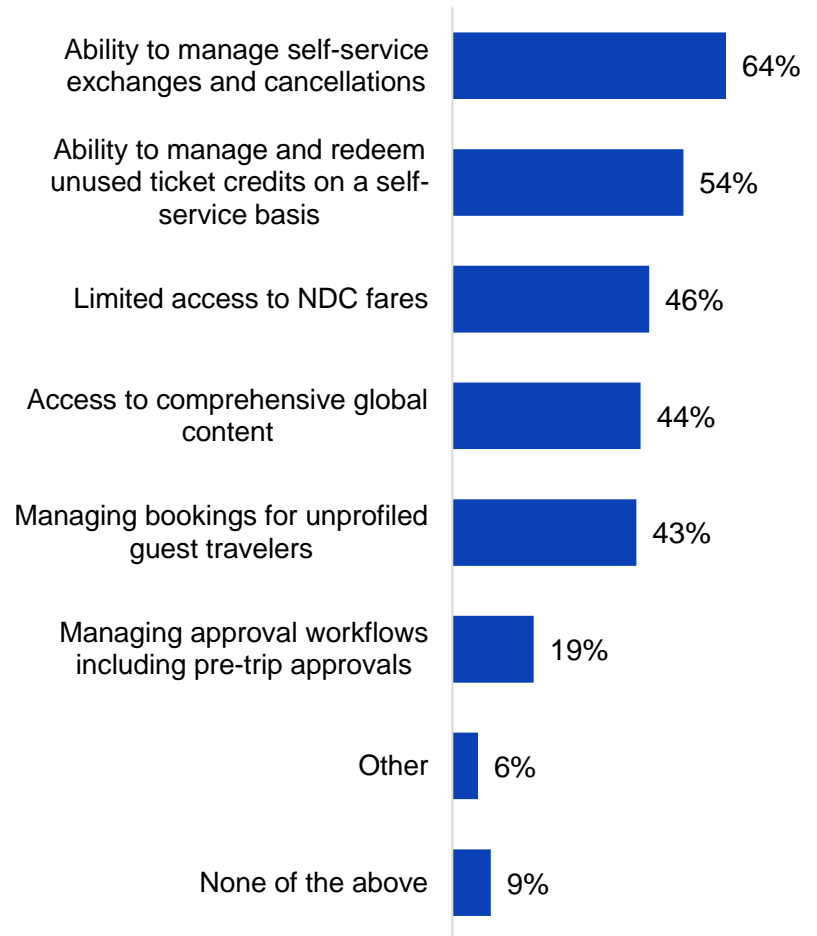
- **Travel programs experience a number of pain points with their corporate Online Booking Tool (OBT).**

Buyers were asked if their program experiences various pain points. Out of seven tested, five are mentioned by at least two in five buyers.

These include the ability to manage exchanges and cancellations (64%), ability to manage unused tickets (54%), limited access to NDC fares (46%), access to comprehensive global content (44%), and bookings for unprofiled guest travelers (43%).

Which Pain Points Are Travel Programs Experiencing With Their OBT?

multiple answers allowed



Q. What are the biggest pain points your travelers are experiencing with your Online Booking Tool? **Please select all that apply (n=127).**

- **Buyers are interested in offering various features through their OBT.**

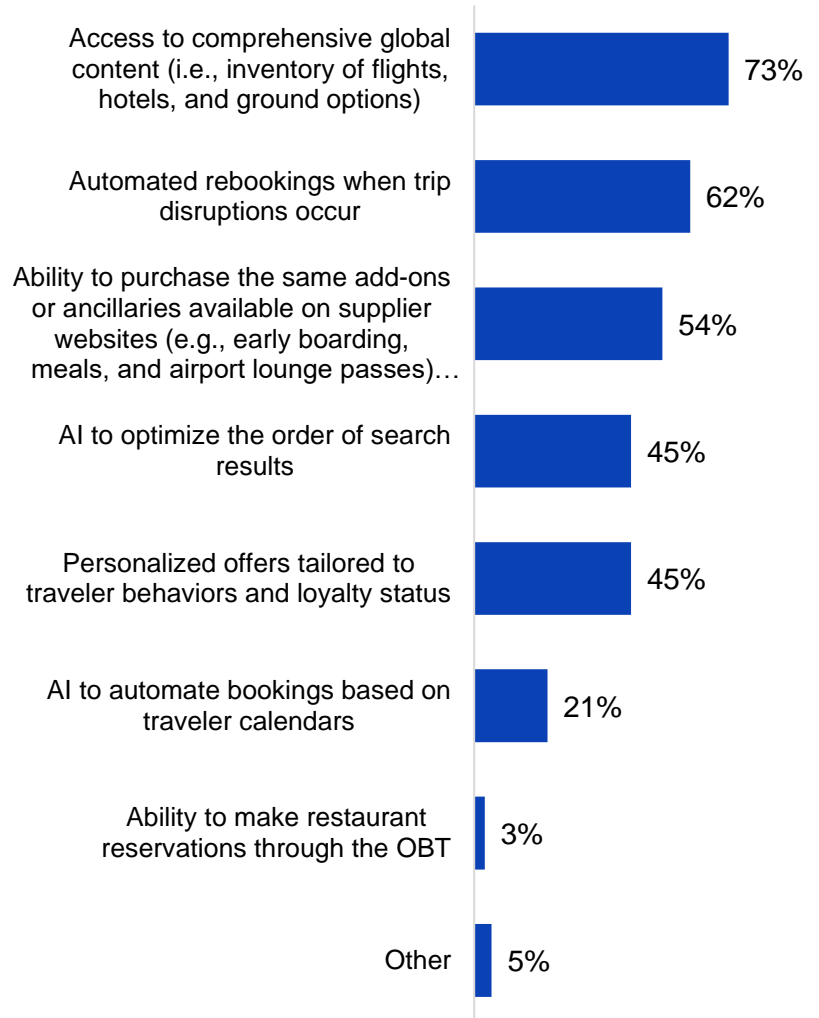
A large majority (73%) are interested in comprehensive global content.

Most are interested in automated rebookings when flight disruptions occur (62%) and the ability to purchase add-ons or ancillaries—commonly purchased at airports or hotels—through the OBT at the time of booking (54%).

Almost half are interested in personalized offers tailored to traveler behavior/loyalty status (45%) and using Artificial Intelligence (AI) to optimize the order of search results (45%).

Which OBT Features Are Buyers Interested in Offering Through Their Program?

multiple answers allowed

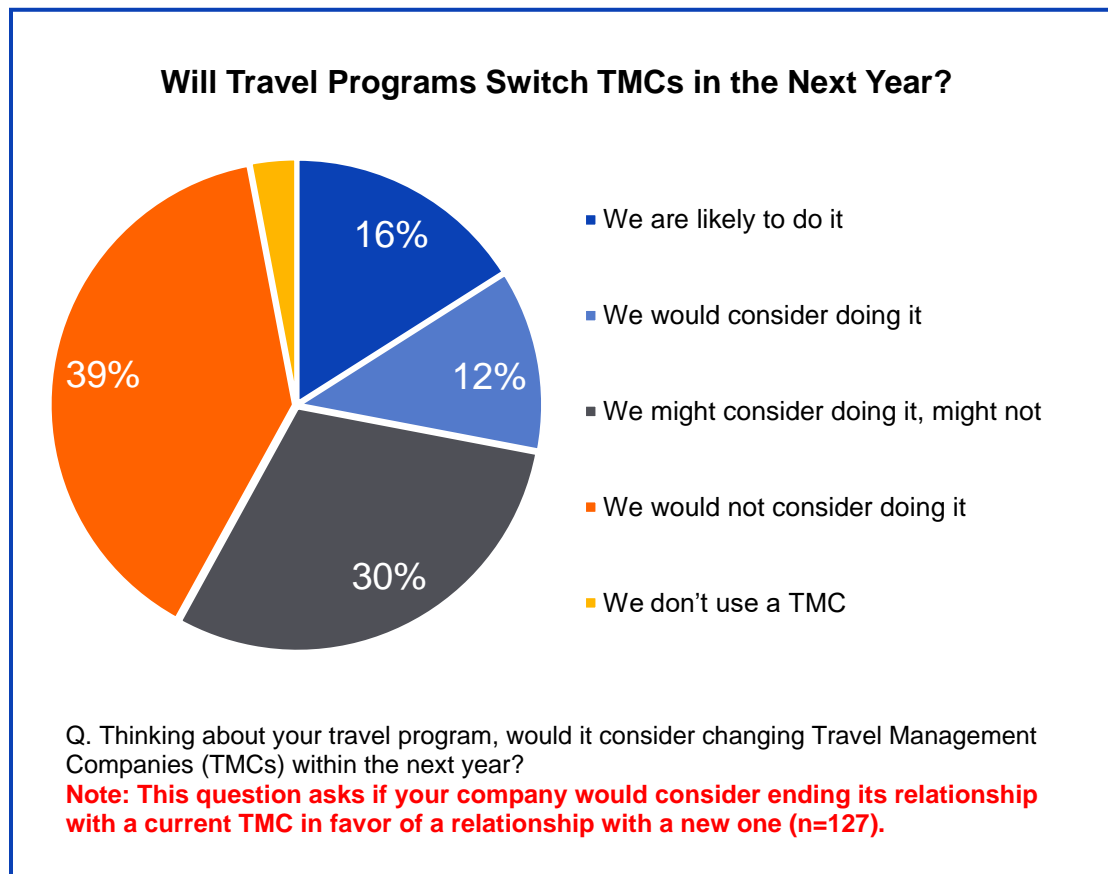


Q. Thinking about corporate Online Booking Tools (OBTs), which features are you most interested in offering through your managed travel program? **Please select all that apply (n=132).**

Travel Management Companies (TMCs)

For Travel Management Companies (TMCs), the past year has been a whirlwind of change and uncertainty. Some TMCs have struggled to develop important technological capabilities – including AI and NDC booking/servicing.

- **Some travel programs are open to switching TMCs within the next year.** More than one-quarter (28%) are likely to switch (16%) or actively considering it (12%). An additional one-third (30%) say they “might consider doing it, might not.” Only two in five (39%) say they would not consider switching. One caveat, however, is that many travel programs use multiple TMCs – and buyers were asked if they are considering replacing *any* of the TMCs that their company uses.



- **Travel programs experience pain points with their TMC's servicing.**

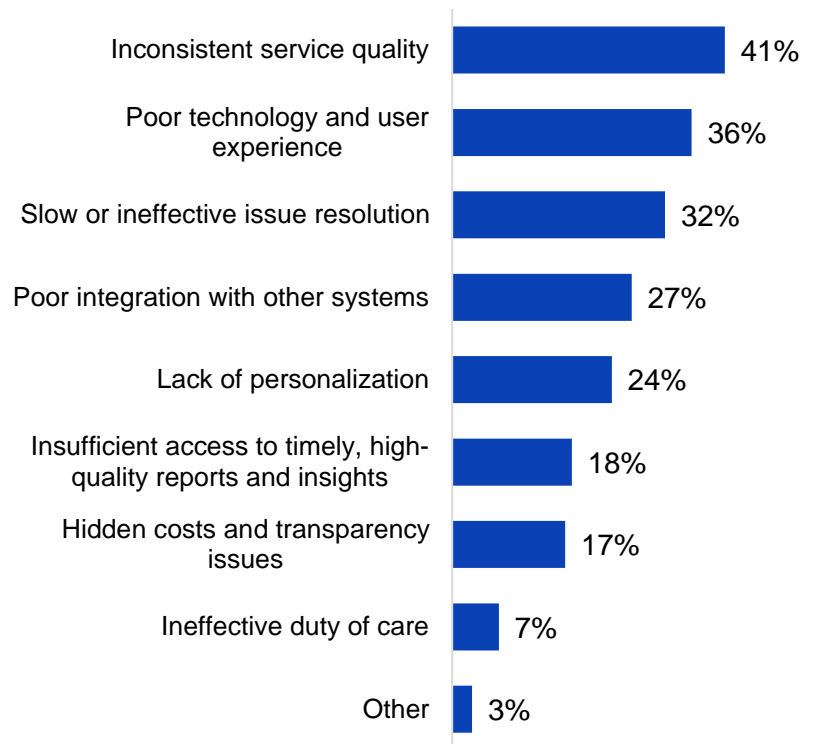
Buyers were asked to indicate which pain points their travelers experience. The most common pain points are inconsistent service quality (41%) and poor technology and user experience (36%).

- **Travel buyers say various innovations are important when it comes to TMC**

servicing. Asked to pick the three most important (out of nine possible), they commonly say proactive disruption management (54%), risk management/duty of care (46%), and the ability to easily service NDC bookings (35%).

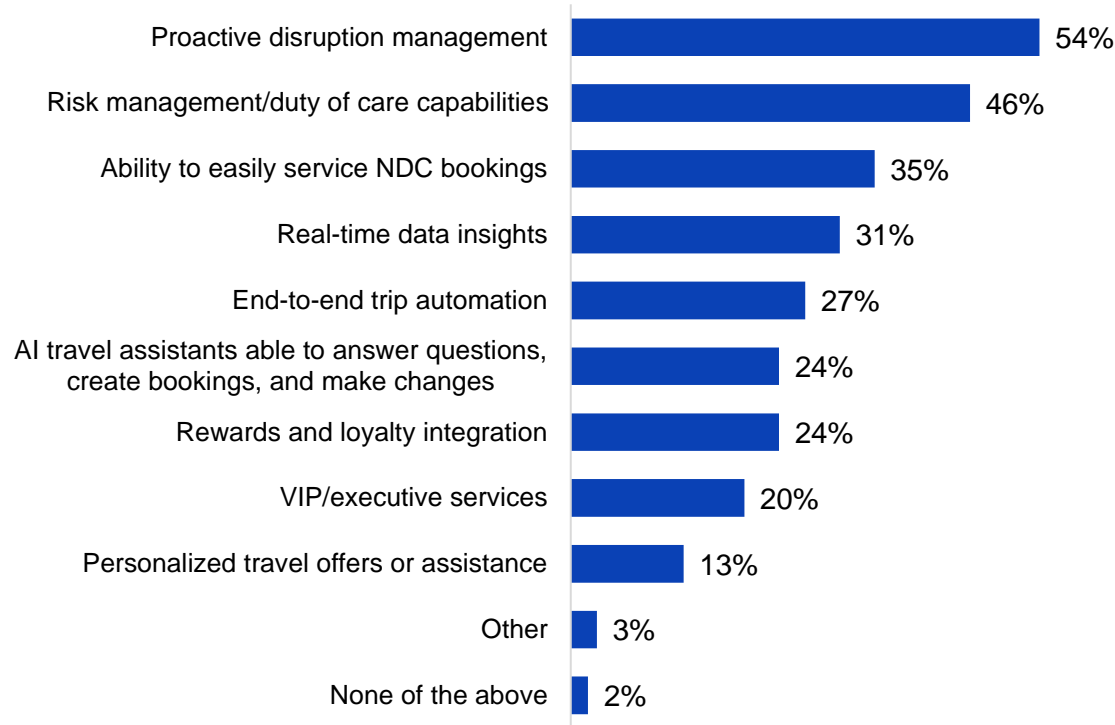
Which Pain Points Does Your Travel Program Experience With TMC Servicing?

multiple answers allowed



Q. What are the biggest pain points your travelers experience with servicing through your TMC? **Please select all that apply (n=123).**

Which Innovations in TMC Services Are Most Important?
up to three answers allowed



Q. When it comes to The Perfect Business Trip, what innovations in TMC services are most important to you?
Please select up to 3 (n=125).

Trip disruptions and business travel

Trip disruptions are a permanent feature of business travel. As long as employees travel, they will contend with bad weather, natural disasters, and geopolitical events. Yet, what compounds disruptions is the *cumbersome process* of dealing with them.

Business travel companies do not deserve blame for bad weather or unexpected events. However, they often have outdated and inefficient processes for managing them. This remains a pain point for travel programs – one that the industry can realistically solve.

- **Trip disruptions cause friction:** As shown earlier, more than half of travel programs (55%) experience at least some friction from managing trip disruptions. Disruptions are the second greatest source of friction experienced by travel programs (out of 10 tested). In most cases, employees book trips online. However, if they are rebooking a canceled or delayed flight, they need to call or email their TMC. If there is bad weather or a natural disaster, they might need to wait a long time before receiving assistance.

However, this is a problem the industry can realistically solve. And, travel buyers *want* a solution. More than half (54%) say “proactive disruption management” is one of the three “innovations in TMC servicing” that is most important to them. This is higher than any other innovation.

Two approaches continue to gain traction:

- **Automated rebookings:** Automated rebookings can save significant time. If a flight is canceled or significantly delayed, an employee can be automatically rebooked for the next available flight. They might receive a text message or push notification alerting them of the change – with action required only if the new flight is not suitable. Three in five buyers (62%) say automated rebookings is one of the most important OBT innovations (see page 22).
- **Predictive analytics:** Some travel companies have made an effort to predict the likelihood that flights will be canceled or delayed – often days ahead of time – based on weather forecasts or other factors. They can alert employees or companies when the likelihood exceeds a certain threshold – and employees can proactively rebook.

A “new normal” for delayed flights?

“Proactive disruption management” is the top service improvement that buyers want to see from their TMC (page 25). The urgency to address disruptions might stem from how often they occur.

- **How often do disruptions occur?** The U.S. Bureau of Transportation Statistics maintains data about the arrival performance of major U.S. airlines. In the final six months last year, 1.32% of flights bound for a U.S. city were canceled. More than one in five (20.67%) arrived at least fifteen minutes late. This includes more than one in 10 (13.67%) that arrived at least 30 minutes late.
- **How have disruptions changed over time?** Flight cancellations have declined over time. The average cancellation rate in the five years before the pandemic (2015-2019) was 1.52%. Last year, it was 1.36%. **However, delays remain elevated by historical standards.** Last year, 1.4 million U.S. flights arrived at least fifteen minutes late – marking the third straight year where at least **one in five flights** arrived late. The average rate in the five years before the pandemic (2015-2019) was 18.2%.

The increase in flight delays could be driven by weather, tighter schedules, and staffing challenges. Yet for travel programs, delayed flights cost time and money – and hurt employee well-being and productivity.

Sources: U.S. Bureau of Transportation Statistics. “On-Time Performance - Reporting Operating Carrier Flight Delays at a Glance.” U.S. Department of Transportation.
<https://www.transtats.bts.gov/HomeDrillChart.asp>

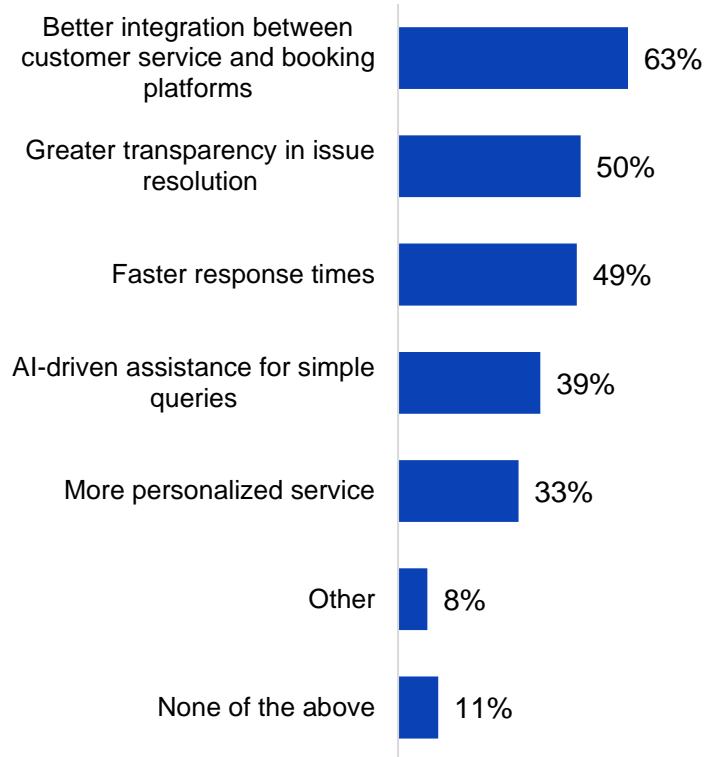
U.S. Bureau of Transportation Statistics. “Arrival Performance by Marketing Carrier.” U.S. Department of Transportation.
https://explore.dot.gov/views/ontime_7_7a/Table7?%3Aembed=y&%3Aiid=1&%3AisGuestRedirectFromVizportal=y

- **Travel buyers want better integration between TMCs and OBTs.** OBTs are typically *not* integrated with TMC servicing. Often times, employees try to book through an OBT. If they encounter an issue and need help from a travel agent, they need to call or email the TMC; they cannot “chat” with an agent through the OBT they are using.

A large majority of buyers (63%) say better integration between customer service and booking platforms is one of the service improvements that would enhance their travelers’ experience.

Which OBT/TMC Servicing Improvements Would Most Enhance Traveler Experience?

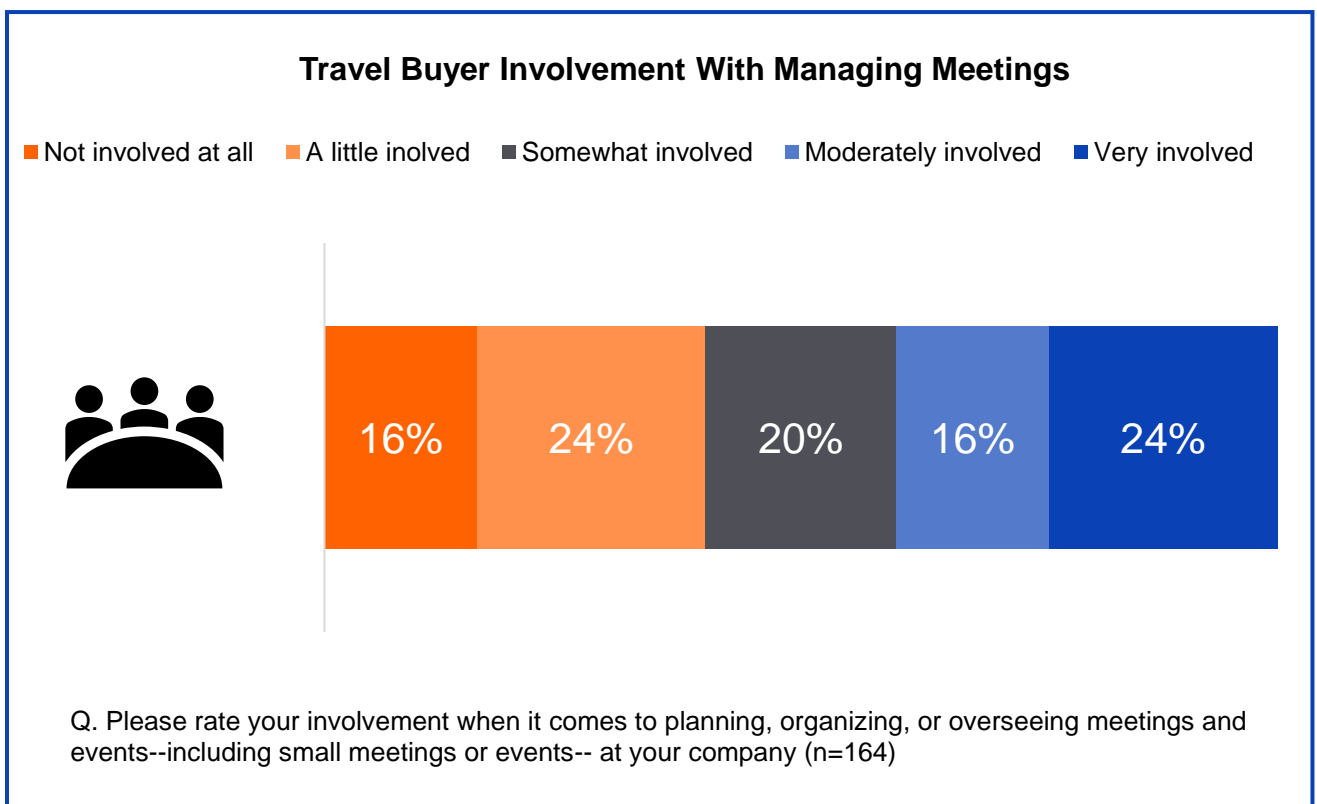
multiple answers allowed



Q. Which of the following service improvements from your TMC and OBT would most enhance your travelers' experience?
Please select all that apply (n=125).

Meetings and Small Meetings

Travel and meetings intersect. Meetings involve travel: travel that can be complex and more difficult to manage than “typical” business travel. In addition, travel managers sometimes *manage* meetings. In the current survey, three in five travel managers (60%) say they are at least “somewhat involved” with “planning, organizing, or overseeing meetings or events” at their company. This includes two in five (40%) that are “moderately” or “very involved.”



Yet too often, the processes that companies have in place for managing meetings—and especially for managing small meetings and meetings-related travel—fall short.

- **Travel and meetings programs are often siloed from each other.** Even though travel managers are often *involved* with meetings, this does not mean the two programs are seamlessly integrated. Almost half of buyers (46%) say their company’s travel and meetings programs are “mostly siloed from each other.” Only 14% say they are “mostly integrated” with each other.



Note: 7% indicate “other”

Q. Thinking about your company’s travel and meetings programs, which of the following best applies?

Note: Question only displayed to respondents who indicated they are at least “a little involved” with planning, organizing, or overseeing meetings and events at their company (n=101).

Siloed travel and meetings

- **Travel and meetings remain siloed:** Almost half of buyers (46%) say their company's travel and meetings programs are mostly siloed from each other. Moreover, there has been little recent progress. Two years ago, two in five buyers worldwide (41%) said their company's travel and meetings programs "mostly worked in siloes," as shown in a 2023 GBTA report titled the *Power of One*.

What are the reasons for siloes – and what are the consequences?

- **Different departments:** Travel and meetings programs are often housed in different departments. For instance, travel might be housed in Procurement while meetings is housed in Marketing. They report to different leaders and work in different offices. While this can make collaboration difficult, it is still certainly possible. The consequences of working separately include lost savings and inefficient processes. For instance, travel and meetings programs might negotiate separately with the same hotel. This prevents them from leveraging their combined spend together to obtain greater discounts. They might conduct separate account reviews with the same hotel chains. They might have separate payment vendors and processes; a single vendor could save time and money.
- **Different priorities:** Travel and meetings programs might have different priorities. Travel programs are commonly focused on cost. Meetings programs are commonly focused on marketing ROI. A unified approach ensures priorities are aligned.
- **Different technology:** One longstanding challenge is that travel and meetings programs use different technology. Travel is booked through TMCs and OBTs. Meetings are planned using specialized venue sourcing tools. This can lead to inefficiencies. For instance, a company uses a meetings tool to reserve venue space and then opens the OBT to search for airports and hotels near the venue location. A combined tool would be able to automatically suggest airports or hotels based on the venue location. In addition, it can be difficult to consolidate data between the two tools. A company can see how much meeting expenses cost – including venue space, catering, and A/V – but needs to do manual legwork to factor in the cost of employees and clients traveling to the meeting. A combined tool can provide a better idea of the true cost – including meeting expenses and travel. However, there are integrations between OBTs and meeting tools that can help solve this challenge.

- **Small meetings are often unmanaged.** Most buyers (53%) say small meetings are typically “organized outside of a managed program” at their company. Only one in five (21%) say they are “typically organized within a managed program.”

Thinking about the small meetings (under 25 attendees) planned or organized by your company, which of the following best applies?

53%

They are typically organized outside of a "managed" meetings program

We do not have formal policies and processes for small meetings; they are organized by part-time planners such as executive assistants; we have do not have KPIs for small meetings; we do not have dedicated technology for small meetings; we do not collect data about small meetings in a central location

20%

They are sometimes organized within a managed meetings program; sometimes outside of one

21%

They are typically organized within a "managed" meetings program

We have formal policies and processes for small meetings; they are organized by professional meetings planners; we have Key Performance Indicators (KPIs) for small meetings; we have dedicated technology for small meetings; we collect data about small meetings in a central location

Note: 6% indicate “other

Q. Thinking about the small meetings (under 25 attendees) planned or organized by your company, which of the following best applies? **Note: Question only displayed to respondents who indicated they are at least “a little involved” with planning, organizing, or overseeing meetings and events at their company (n=101).**

What are the consequences of “unmanaged” small meetings?

- **Small meetings are often “unmanaged:”** Half of buyers (53%) say small meetings are typically organized outside of a managed program at their company. Only one in five (21%) say small meetings are typically organized within a managed program.

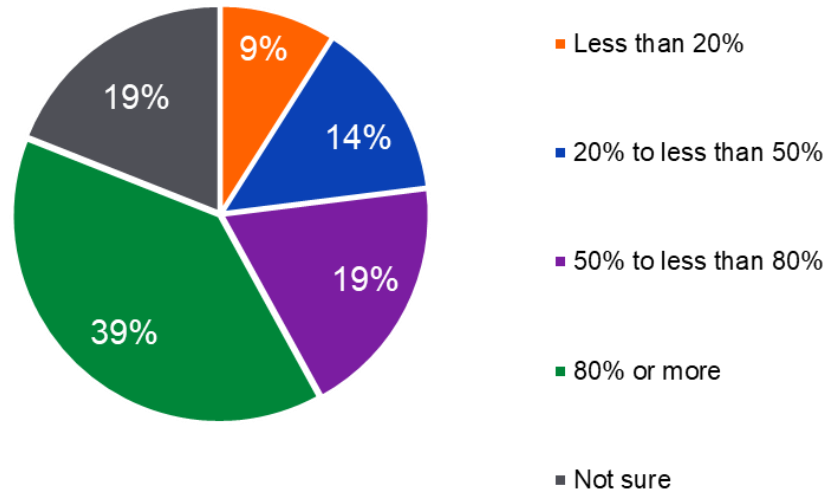
Unmanaged small meetings pose a number of challenges.

- **Lost savings:** Companies compare fewer options before making a decision. They collect bids from fewer venues. They spend less time negotiating back and forth. This leads to lost savings. In addition, companies do not collect data about meetings spend. As a result, they do not have data about their spending with a particular hotel or venue that they can leverage for greater discounts in the future.
- **Process inefficiencies:** Companies have costly and inefficient processes when they plan meetings outside of a managed program. For instance, they visit multiple venues’ websites. Or, they call or email venues to solicit bids. This is less time efficient than searching for venues—and conducting RFPs—using an electronic tool. Companies might receive multiple invoices for the same meeting, and pay for various aspects of the meeting (e.g., venue space and food) using different employees’ corporate credit cards. This makes it harder to track and reconcile expenses than if all expenses are charged to the same P-card. Companies might have manual registration and communication processes. For instance, they might manually add attendees to an email list – rather than using an automated communication tool tied to registration data.
- **Poor understanding of ROI:** Companies typically do not have clearly defined Key Performance Indicators (KPIs) that they can use to measure the success of unmanaged meetings. This makes it difficult to understand the Return on Investment (ROI) of small meetings. Companies might prioritize ineffective meetings over more effective ones.

- **A large percentage of small meetings are typically unmanaged.** Among the buyers who indicate their small meetings are “typically” or “sometimes” unmanaged, almost three in five (58%) estimate that at least half of their company’s small meetings are planned outside of a managed program.

Approximately What Percentage of Small Meetings are “Unmanaged?”
among buyers who indicate their company’s small meetings are at least “sometimes” unmanaged

On average, buyers estimate **66%*** of their small meetings are organized outside of a managed program



Q. Thinking about the small meetings planned or organized by your company, approximately what percentage happen outside of a managed meetings program? **Note: Question only displayed to respondents who indicated their company’s small meetings are at least “sometimes” organized outside of a managed program (n=60)**
*This represents an “estimated” average calculated using the midpoints of ranges

- **Buyers value different features of meetings planning software – particularly for small meetings.** They were asked if various innovations are important.
 - **Centralized platform:** A large majority (62%) say it is important to have a centralized platform where they can manage meetings logistics and attendee travel in the same place. In other words, they can use a single tool to manage various aspects of the meeting—such as RSVPs, venue sourcing, and reporting—but

also book and track attendee travel to the meetings. In the past, these two functions have largely been separate.

■ **Destination recommendations:**

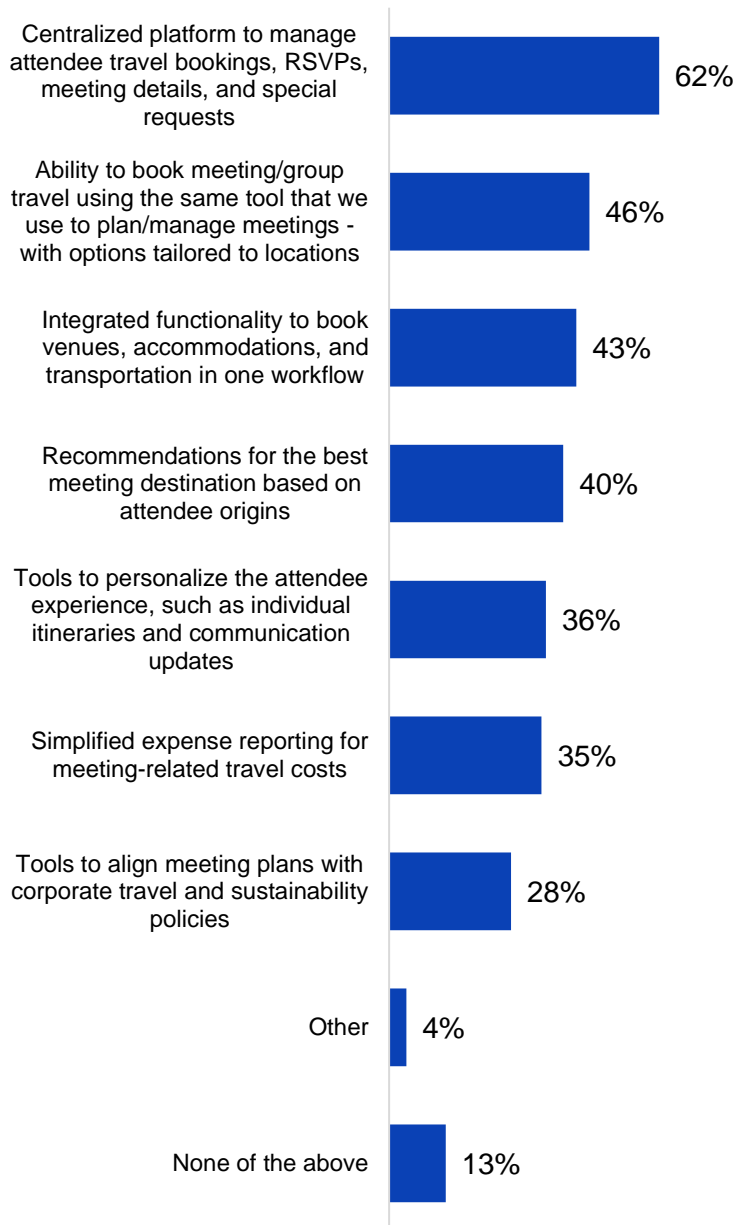
Two in five buyers (40%) want their software to recommend meeting destinations based on attendee origins. For instance, the tool might analyze where attendees are based – and recommend the most convenient location (e.g., shortest flight times or most direct flights).

■ **Personalized communication:**

More than one-third (36%) say it is important that

When It Comes to Meetings Planning Software, Which Innovations Are Important?

multiple answers allowed



Q. You mentioned you are at least somewhat involved with meetings and events at your company. Thinking about meeting and event planning software, particularly for small meetings (less than 25 attendees), which of the following innovations are important? Please select all that apply. **Note: Question only displayed to respondents who indicated they are at least “a little involved” with planning, organizing, or overseeing meetings and events at their company (n=101).**

meeting software is able to “personalize” communication with attendees. In other words, different attendees can receive different communications based on their unique needs or preferences.

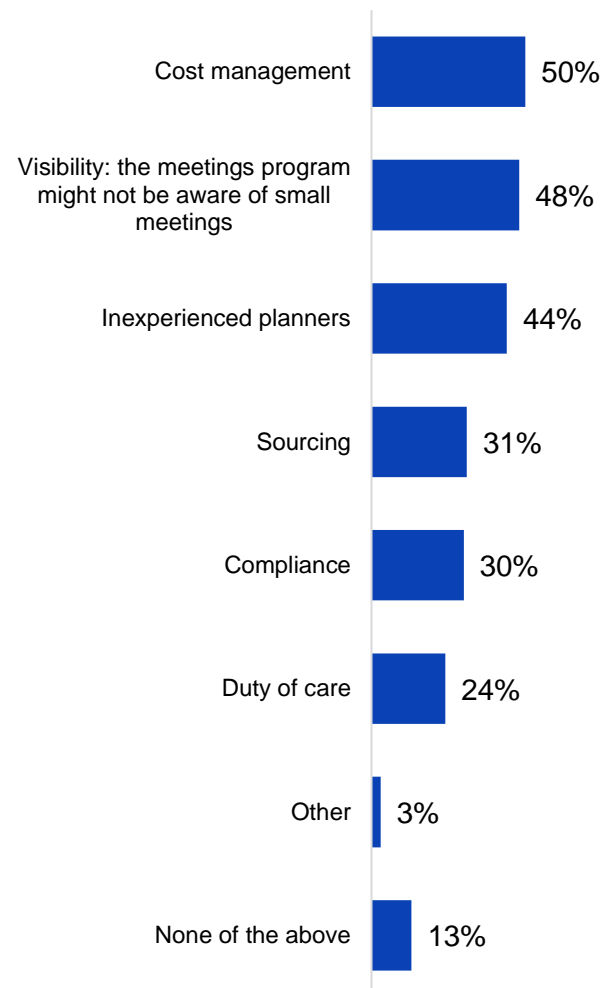
- **Companies face challenges with small meetings.**

Buyers were asked to indicate which challenges their program faces. A couple key points stand out:

- **Cost management:**
Half of buyers (50%) say cost management is a challenge. Small meetings are often organized outside of a managed program. Planners do not set a realistic budget – or any budget at all. In addition, companies struggle to discover low cost venues—or obtain discounts—if they do not use a sourcing tool.

Which Challenges Do Companies Face With Small Meetings?

multiple answers allowed



Q. What are the biggest pain points your employees experience with planning and managing travel for meetings and events including small meetings with fewer than 25 attendees? Please select all that apply.

Note: Question only displayed to respondents who indicated they are at least “a little involved” with planning, organizing, or overseeing meetings and events at their company (n=100).

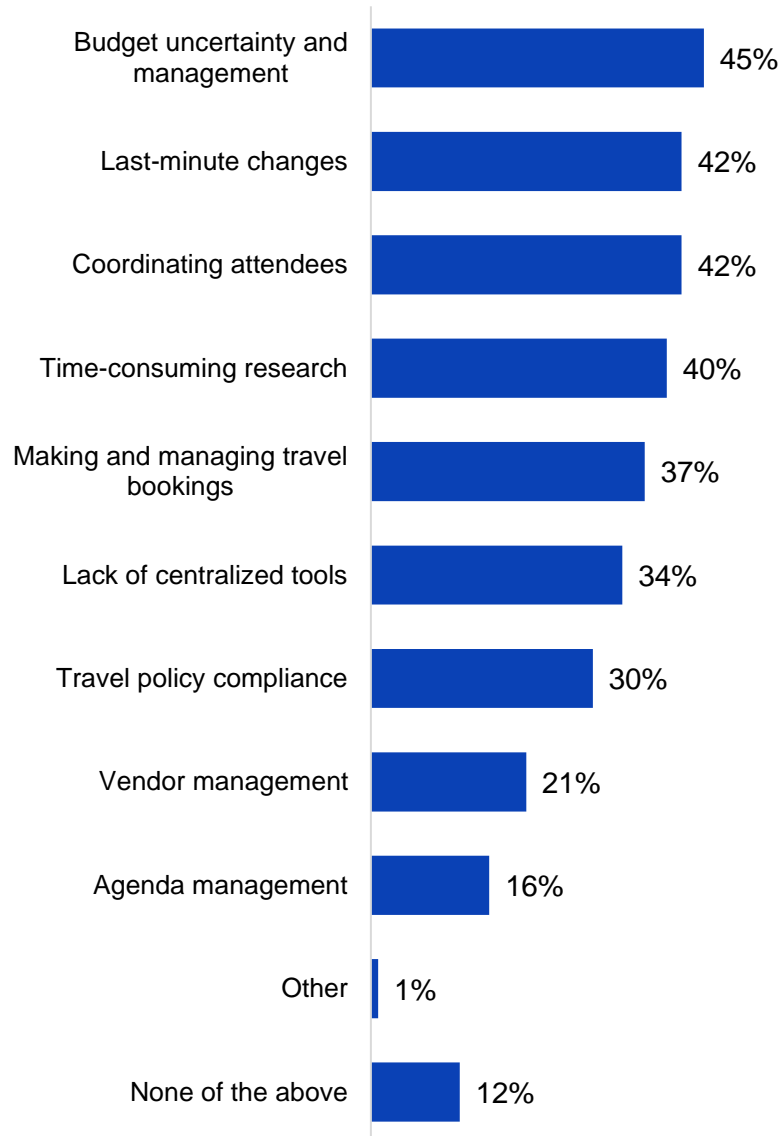
- **Visibility:** Half of buyers (48%) say visibility is a challenge. When small meetings are organized outside of a managed program, the meetings team might not even know they are taking place. The meetings team is unable to assist with these meetings. And, it does not collect data that can be used to analyze the overall meetings program, evaluate the success of small meetings, and leverage spend in future negotiations with venues and vendors.
- **Inexperienced planners:** Inexperienced planners is also common challenge – mentioned by more than two in five buyers (44%). “Part-time planners” (such as administrative assistants) are often unfamiliar with company policies or best practices for organizing meetings.

Companies not only face challenges with planning meetings; they also face challenges with meetings-related travel.

- **Buyers identify a number of challenges with managing travel for meetings at their company.** These include budget uncertainty and management (45%), coordinating attendees (42%), time-consuming research (40%), and making and managing travel bookings (37%).

Which Challenges Do Companies Face With Meetings Travel?

multiple answers allowed



Q. What are the biggest pain points your employees experience with planning and managing travel for meetings and events including small meetings with fewer than 25 attendees? Please select all that apply.

Note: Question only displayed to respondents who indicated they are at least “a little involved” with planning, organizing, or overseeing meetings and events at their company (n=101).

Meetings *travel*: an overlooked source of friction

Meetings management presents a number of challenges. These have been explored in past GBTA research. More overlooked is *meetings travel*. This presents its own unique challenges.

- **Group travel:** Employees often travel together. Companies need to make “group” air bookings for multiple employees. These reservations are often made manually. For instance, the company might call an airline’s “group desk.” In addition, employees sometimes travel separately – at different times, or from different cities. When this happens, it can be difficult to track and coordinate when different employees arrive. Companies rely on manual methods (such as spreadsheets) to do so.
- **Out-of-program hotels:** Employees commonly stay at “event” hotels that are not part of the preferred program – or even available through the OBT. Often times, companies do not have real-time data about these bookings that they can use to track and locate employees in an emergency.
- **Guest travel:** Meeting attendees can include non-employees (guests) who do not have a profile with the OBT/TMC. Managing guest travel is the greatest source of friction experienced by travel programs (see page 9).

Expense Management

Over the past 15 years, expense reporting has improved. Business travelers no longer need to stuff paper receipts in their pockets and scan them when they get home; they can take pictures with a smartphone. **However, expense reporting remains a source of friction.** As shown earlier, half of travel programs (50%) experience at least “some friction” with expense reporting – with buyers rating the level of friction experienced a three or higher on a five-point scale. However, the industry is on the cusp of innovations that can dramatically improve the process.

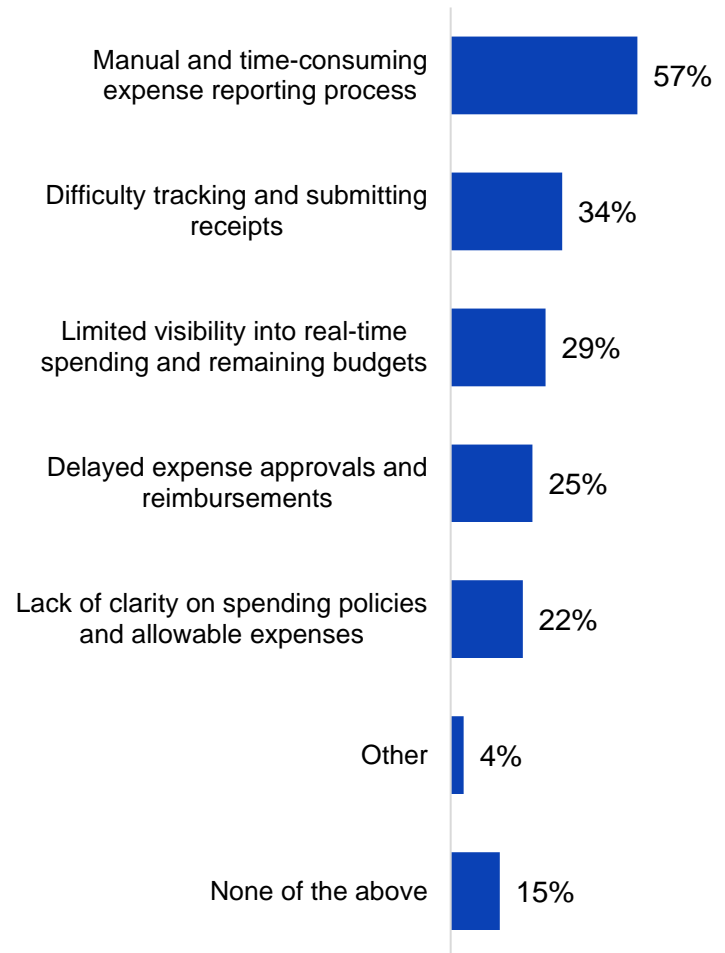
- **Expense reporting remains manual and time-consuming.** Travel buyers were asked to indicate the three biggest pain points their company's travelers face with corporate cards and expense reporting.

The most commonly mentioned challenge is a manual and time-consuming expense reporting process. However, this could change as the industry progresses toward automated expense reporting (see page 42).

Almost one-third of buyers (29%) say limited visibility into real-time spending is a top challenge. If expense data is not available in real-time, companies can exceed travel budgets without realizing it until after-the-fact.

What Are The Greatest Challenges That Travelers Face With Corporate Cards and Expense Reporting?

up to three answers allowed



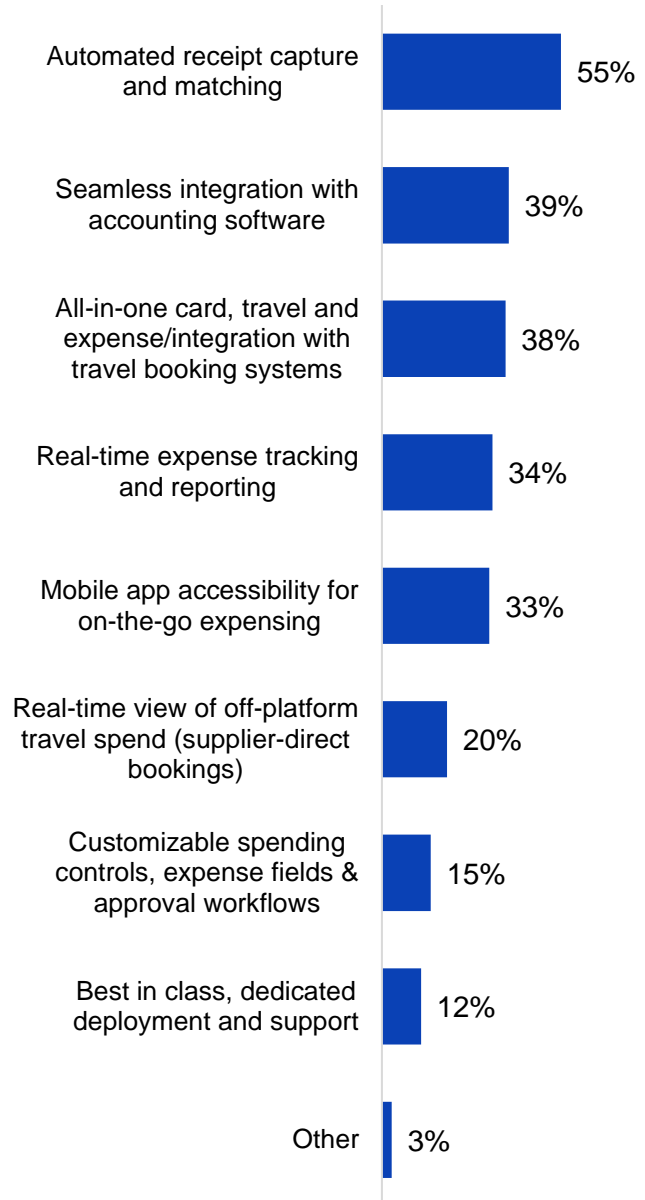
Q. What are the biggest pain points that your travelers experience with corporate cards and expense reports?

Please select up to three (n=117)

- **Buyers are interested in features that streamline payment and expense processes.** They were asked to indicate up to three innovations in expense reporting and payment that they are most interested in offering through their program. They commonly say automated receipt capture and matching (55%), seamless integration with accounting software (39%), and an all-in-one card, travel, and expense integration with booking systems (38%).

Which Card and Expense-Related Innovations Are Viewed as Most Important?

up to three answers allowed



Q. When it comes to The Perfect Business Trip, what innovations in corporate cards and expense management are most important to you?
Please select up to three (n=117).

Innovation in expense management

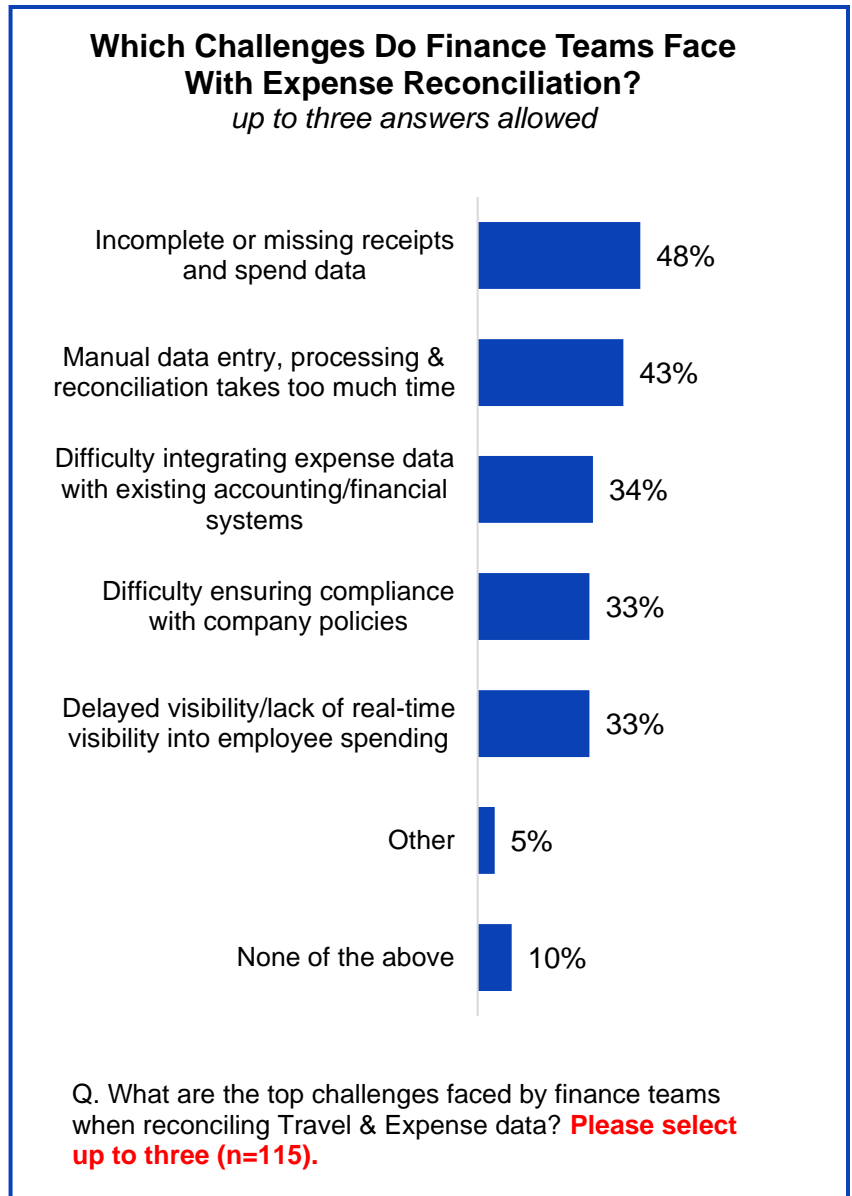
- **Expense management remains a pain point:** Half of travel buyers (50%) say their company experiences friction from managing expense reports – rating the level of friction a three or higher on a five-point scale.

However, a number of innovations have the potential to streamline expense reporting and reduce friction. These include:

- **“Real-time” corporate card feeds:** Expense management software feeds data from corporate credit cards. These integrations are not new. In the past, even when these integrations were in place, employees had to manually enter expenses after their trip – adding various details such as the type of expense and the name of the merchant. However, this is changing – as a result of AI and the growing adoption of spend management tools that include both cards and expense software. Increasingly, expenses automatically populate based on data fed from corporate cards. In the near future, travelers might not need to manually input details in expense reports; they will simply need to double-check details that have been automatically entered. This simplifies expense reporting. It also gives companies real-time visibility of spending as it happens.
- **Intelligent receipt scanning:** Employees can add pictures of receipts to expense reports. Optical Character Recognition (OCR) allows expense software to convert the text on receipts to a machine-readable format. This technology has existed for years. However, AI has the potential to add another layer of capability. It can interpret text within the context of the company’s travel policy. It can automatically match receipts to card transactions—and flag out-of-policy expenses for manual review.
- **“Policy-enforcing” payment:** Expense reporting ensures policy compliance. In the future, companies will increasingly rely on payment controls to do the same thing. Consider the following example. Companies issue single-use virtual cards tied to mobile wallets. Employees use these to pay for meals at restaurants. These virtual cards have customized controls. They can only be used at restaurants; and spending is limited to the amount allowed for specific meals. This could make expense reporting unnecessary. Companies will not need to rely on expense reporting to ensure compliance; they can use payment controls to achieve the same goal.

- **Companies face challenges with expense reconciliation.**

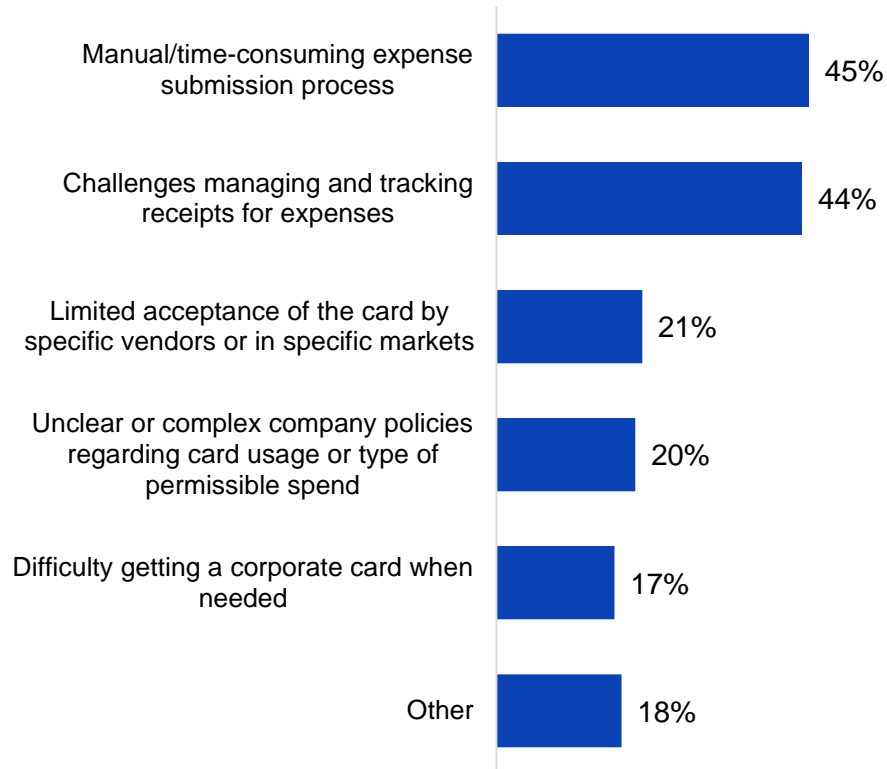
Asked to pick the top three challenges faced by finance teams, buyers commonly say incomplete or missing receipts and spend data (48%), manual data entry, processing and reconciliation (43%), and difficulty integrating expense data with accounting/financial systems (34%).



- **Companies also face challenges with corporate cards.** When asked which challenges their company's travelers face, buyers commonly say a manual/time-consuming expense submission process (45%) and managing and tracking receipts (44%).

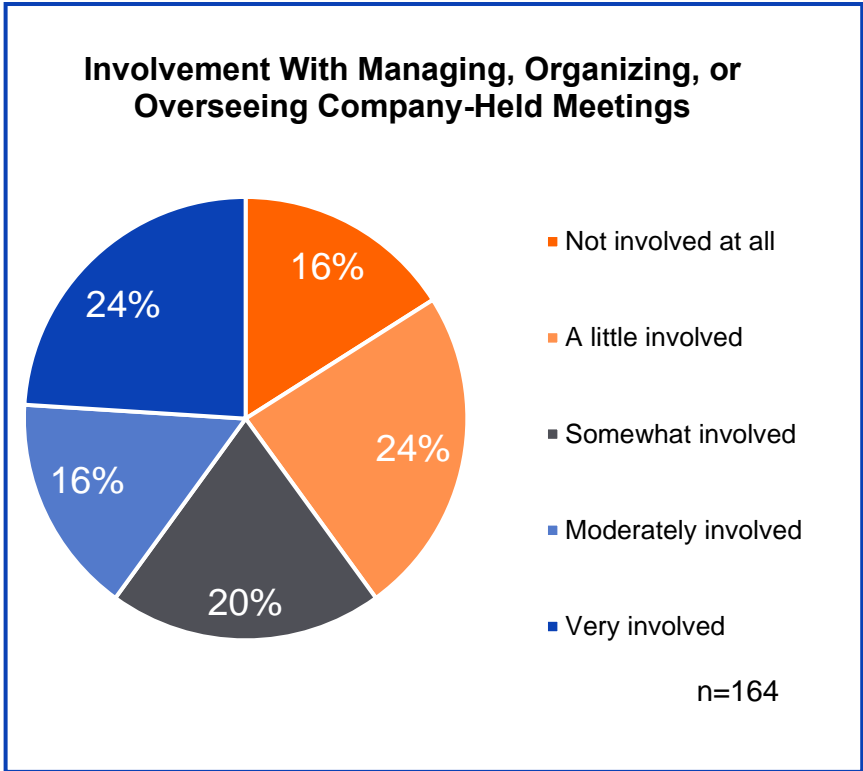
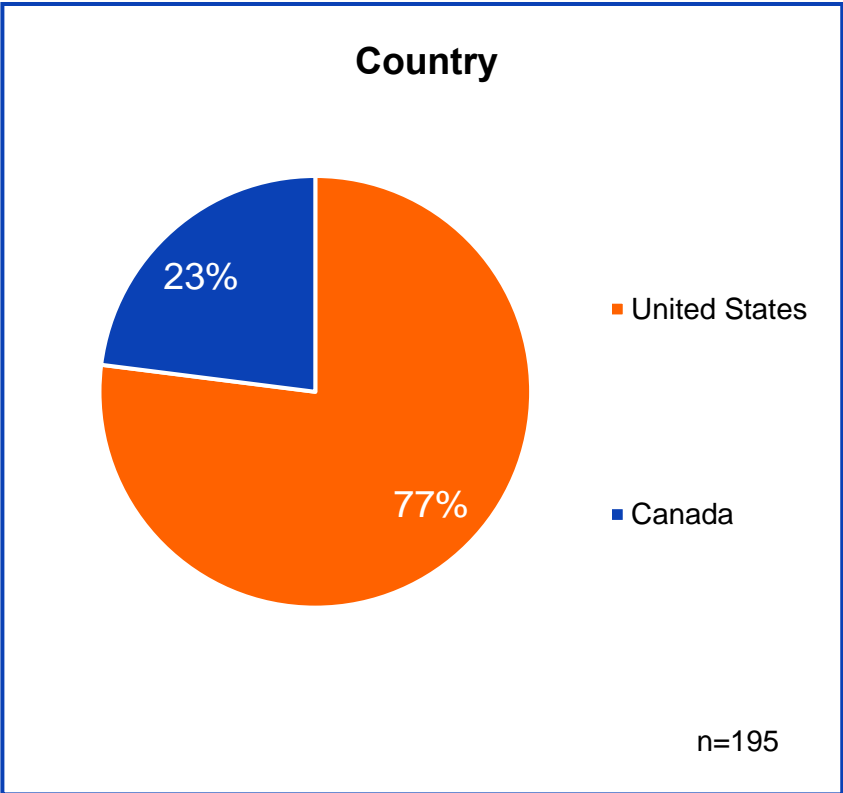
Which Challenges Do Travelers Face With Corporate Cards?

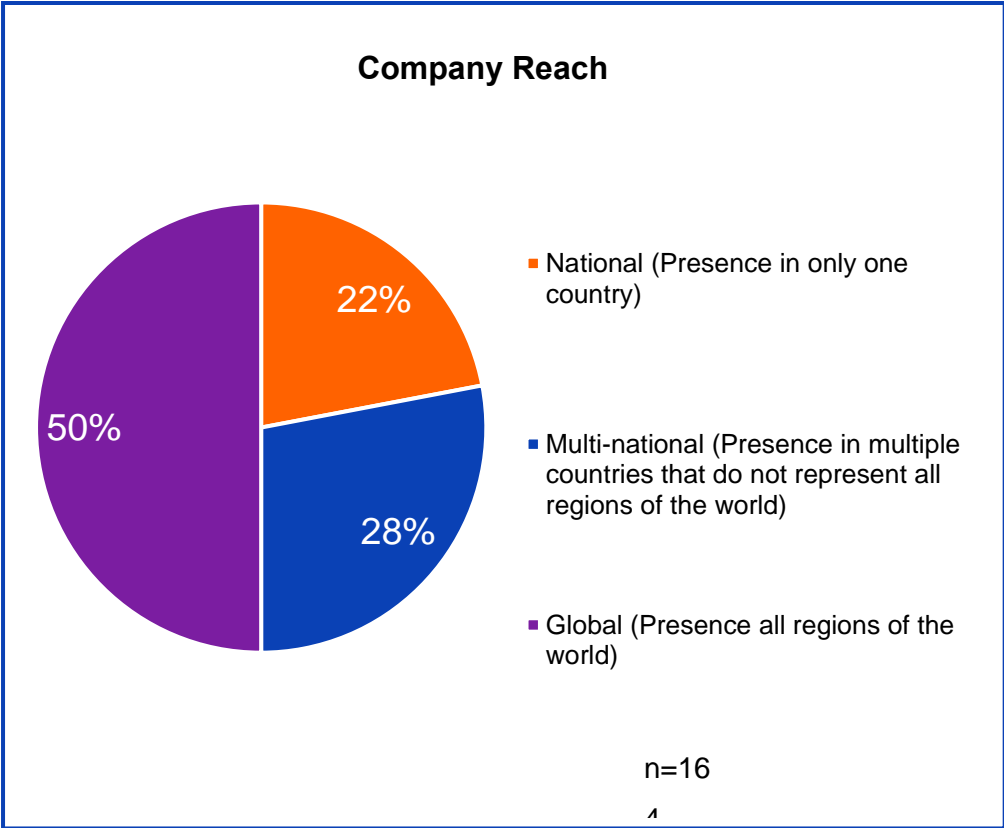
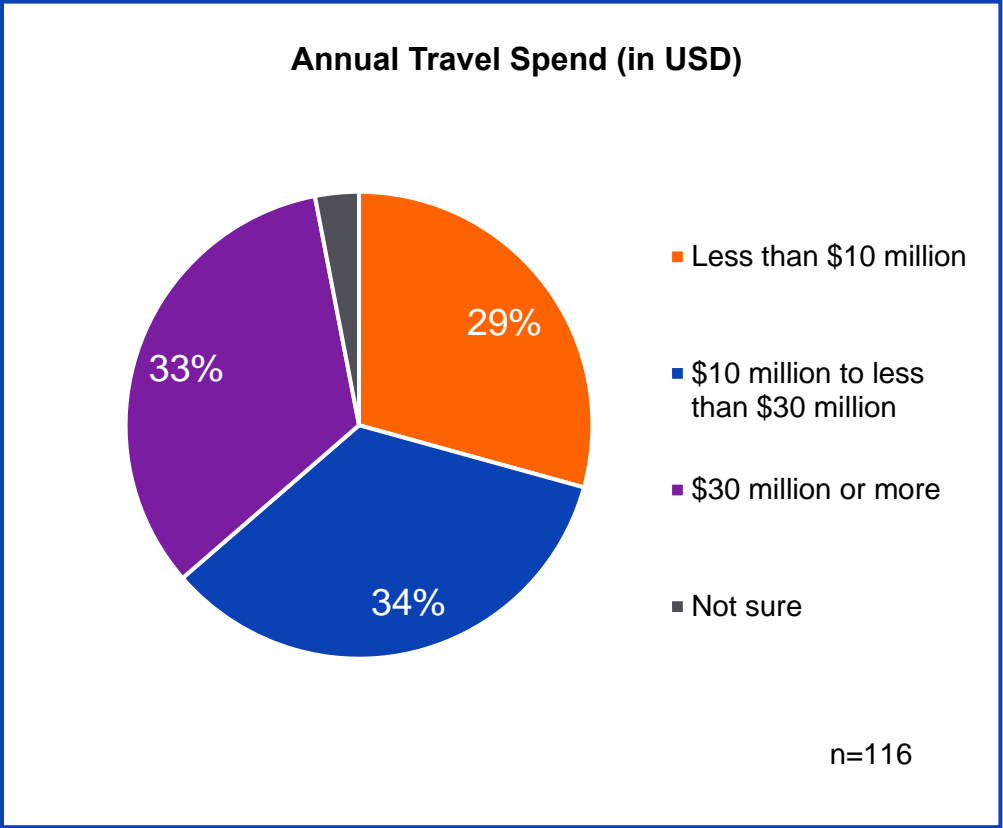
multiple answers allowed



Q. What are the biggest challenges your travelers face with corporate cards? **Please select all that apply (n=105).**

Respondent Profile





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About GBTA



The Global Business Travel Association (GBTA) is the world's largest business travel and meetings trade organization headquartered in the Washington, D.C. area with members on six continents, who

manage more than \$345 billion of global business travel and meetings expenditures annually. GBTA delivers world-class education, events, research, advocacy, and media to a growing global network of more than 28,000 travel professionals and 125,000 active contacts. For more information, visit

www.gbta.org.

About Spotnana



Spotnana is modernizing the infrastructure of the travel industry.

It's our vision to power the perfect trip for travelers everywhere. Our open Travel-as-a-Service platform improves corporate and leisure traveler experiences, helps TMCs increase revenue and efficiency, enables travel providers to deliver personalized offers, and empowers any company to sell travel to their customers.

About Direct Travel



Direct Travel simplifies the business travel experience by combining advanced technology with personalized

human service. Our open-technology infrastructure integrates seamlessly into

your systems and workflows, while inviting third-party innovators to build with us—advancing the vision of “The Perfect Trip” through continuous innovation. Through Avenir, our best-in-class platform developed in partnership with leading technology providers, we offer the industry’s broadest inventory and a modern shopping experience powered by real-time data and deep supplier connections.

About Troop



TROOP is the comprehensive cloud-based meeting planning and group travel logistics platform for companies that plan multiple small and mid-size meetings with travel a year.

Trusted by some of the biggest brands in consulting, technology, life sciences, and other industries, TROOP helps companies bring people together cost-effectively, efficiently, safely, and sustainably.