BCD Travel Study „Business Travel Trends Switzerland 2016"

BCD travel

travel smart. achieve more.

Agenda
Corporate travel

BCD travel

Line of inquiry
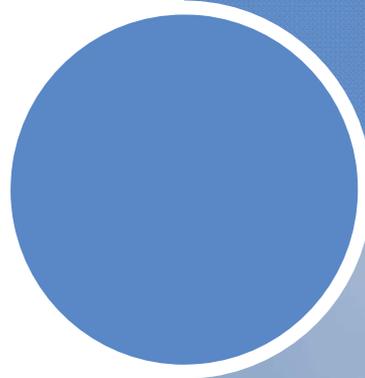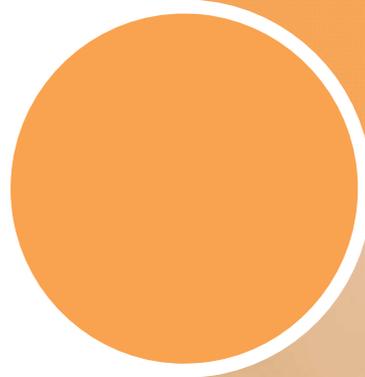
Line of inquiry

- Contents: The document presents the results of the "Corporate Travel" study. We polled 100 CEOs and Corporate Travel Managers from companies in Switzerland with 50+ employees.

- Method: Computer assisted telephone interview (CATI)

- Sample size: N = 100

- Date of study: April 2016

BCD travel

Management summary

Management summary
The relevance of corporate travel is increasing – at the same time as demand for efficiency.

- Digitalization is making great strides – yet technology is not replacing face-to-face meetings in the business world. **Most Swiss companies indicate that the importance of corporate travel for their company's success has increased over the last five years (P. 22).** At the same time, **eight out of ten companies report increasing time pressure and demands on transportation connections.**

- One way to efficiently handle at least the booking of a business trip is to use a professional corporate travel group. **Virtually half of all companies already use this option** (P. 13). **The main reason for outsourcing travel: A contact person** who can rapidly answer questions about the trip (P. 15).

- **For online bookings, the most important requirement is a simple and intuitive portal (P. 23).** Next in importance is a guaranteed best available price and the ability to book all trip components within a single portal.

BCD travel

Management summary

High requirements for corporate travel – especially for security.

- When is comes to **corporate travel management criteria**, companies **make virtually no distinction between various management levels. Adherence to company guidelines,** together with **security**, come first. A greater focus is placed on employee security than on that of management (P. 12).

- The most feared security risk is terrorism. **One out of every four CEOs or Corporate Travel Managers estimate the probability of terrorist attacks as high to very high** (P. 18).

- When planning corporate travel, the most common security precautions taken by Swiss companies are **intelligence about the destination and a constantly available contact person for the business traveler (P. 19)**. Only one out of two firms has implemented such measures. One out of five companies takes absolutely no security precautions for corporate travel. Companies that work with a corporate travel group are more likely to take preventive security measures (P. 20).

BCD travel

Management summary
Efficiency, sustainability and work-life balance are important.

- According to Swiss companies, the biggest problems for corporate travel are **long, unproductive travel times and delays due to traffic congestion or breakdowns** (P. 16). One out of four companies report such difficulties, which can have economic repercussions. **Corporate travel group clients rarely have any problems**; their business trips are planned more efficiently (P. 17).

- When Swiss businessmen think of sustainable travel, they primarily think of efficiency. The majority specifically book **accommodation near their meeting place** and rely on **local public transportation** (P. 21). This saves time and protects the climate. At least one fifth of Swiss companies consciously use environmentally friendly transportation and support climate protection projects through compensation for emissions generated during their corporate travel; a further 30% are considering this for the future.

- **A great majority of companies are concerned about their employees' work-life balance during corporate travel.** They take long weekends and holidays into consideration during planning, or provide employees the opportunity to combine business trips with personal activities (P. 24).

BCD travel

Results

BCD travel
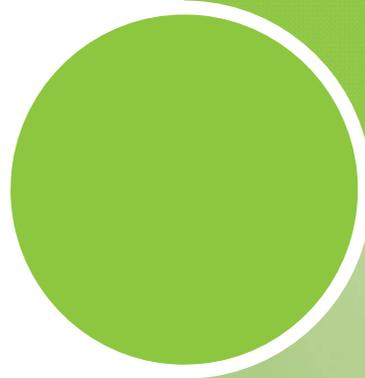
Follow the rules

Adherence to travel guidelines is the highest priority for business travelers.

	Always	Mostly	Sometimes	Seldom	Never
Adherence to the company's travel guidelines	61%	21%	9%	5%	4%
Security	56%	28%	5%	5%	6%
The fastest connection	41%	44%	9%	4%	2%
The cheapest connection	39%	31%	20%	7%	3%
Health, e.g., sufficient sleep or possible comp time	38%	35%	12%	7%	8%
Personal preferences and wishes, e.g., when choosing means of transportation	27%	37%	26%	6%	4%
Comfort, stress-free travel	23%	42%	22%	8%	5%
High productivity on the trip	18%	37%	20%	12%	13%
Sustainability	16%	41%	26%	11%	6%

Question 1: Let us begin with your own corporate travel / travel by your managers. What are you most concerned with?
Baseline: All respondents, N = 100 (Scaled questions, sorted by "always")

BCD travel

Security is primary

The most important aspect of employee corporate travel is their security.

	Always	Mostly	Sometimes	Seldom	Never
Security	67%	22%	8%	2%	1%
Adherence to the company's travel guidelines	61%	23%	9%	7%	1%
Health, e.g., sufficient sleep or possible comp time	42%	34%	16%	5%	2%
The cheapest connection	39%	40%	15%	3%	2%
The fastest connection	38%	43%	10%	5%	3%
Personal preferences and wishes, e.g., when choosing means of transportation	28%	33%	24%	9%	7%
High productivity on the trip	27%	42%	21%	5%	4%
Comfort, stress-free travel	26%	46%	20%	7%	2%
Sustainability	23%	37%	29%	5%	5%

■ Always ■ Mostly ■ Sometimes ■ Seldom ■ Never

Question 2: And what is the situation with your employee corporate travel? What should your employees be most concerned with?
Baseline: All respondents, N = 100 (Scaled question, sorted by "always")

BCD●travel

Protecting employees

Security is even more central for corporate travel by employees than for management.

■ CEO　■ Employees

During corporate travel, pay attention to…

	CEO	Employees
Adherence to the company's travel guidelines	61%	61%
Security	56%	67%
The fastest connection	41%	38%
The cheapest connection	39%	39%
Health, e.g., sufficient sleep or possible comp time	38%	42%
Personal preferences and wishes, e.g., in choosing the means of transportation	27%	28%
Comfort, stress-free travel	23%	26%
High productivity on the trip	18%	27%
Sustainability	16%	23%

Comparison between questions 1 and 2
Baseline: All respondents, N = 100 (Scaled question: "Always", sorted by "management")

BCD travel

I will book that for you.

Virtually one out of two companies with 50+ employees books its corporate travel through a corporate travel group.
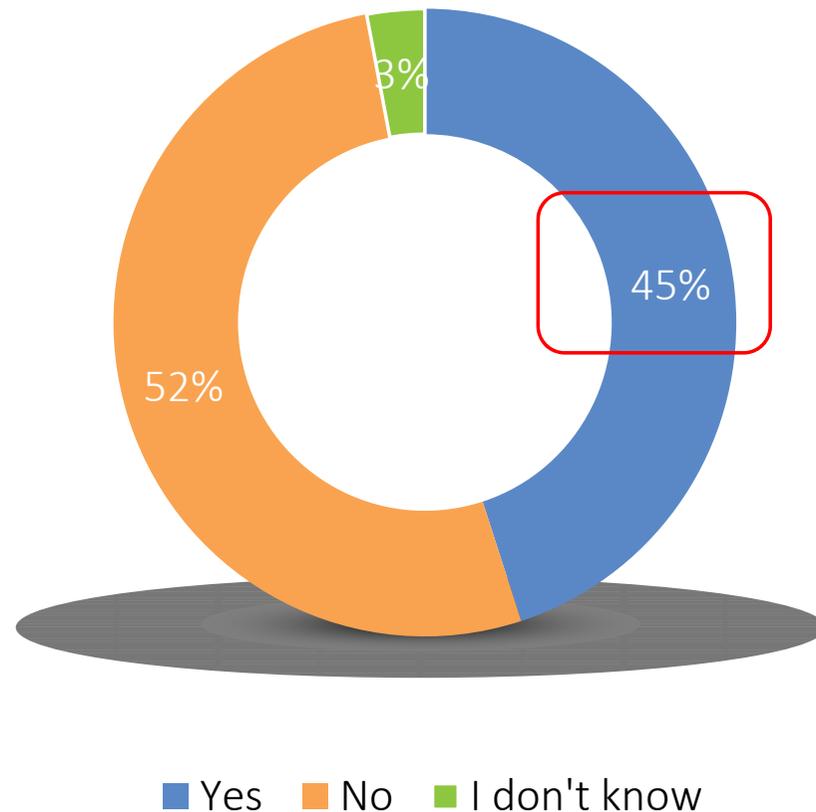
45%

52%

3%

■ Yes ■ No ■ I don't know

Question 3: Does your company work with a professional corporate travel group for your bookings?
Baseline: All respondents; N = 100 (single response)

BCD travel

Large companies often work with corporate travel groups.

Booking via corporate travel group		Sector			Employees		
	Total	Service provision/ corporate consulting	Commercial/ industrial/ manufacturing	Other	50 to 99 employees	100 to 249 employees	250+ employees
Basis	100	32	50	18 ⚠️	48	31	21 ⚠️
Yes	45%	41%	48%	44%	33%	58%	52%
No	52%	59%	48%	50%	65%	42%	38%
I don't know	3%	0%	4%	6%	2%	0%	10%

■ at least 5% above the average
■ at least 5% below the average

⚠️ Small sample

Question 3: Does your company work with a professional corporate travel group for your bookings?
Baseline: All respondents; N = 100 (single response)

BCD travel

No long searches

The main reason for using a corporate travel group: The contact already has all intelligence.

Personal contact person can more quickly answer questions about connections, hotels, etc. — **69%**

Constant access to a contact person when problems arise — **47%**

No effort needed to search for the best travel connection/the best overnight accommodations — **47%**

All important intelligence and documentation from a single source — **47%**

Lower cost than doing it in-house: — **47%**

Travel bargains — **42%**

One invoice for all business trip transactions instead of partial invoicing from different providers. — **42%**

Protection against security risks. — **38%**

Mandatory company guidelines — **24%**

Other reasons — **13%**

- Bookings for larger groups
- Distant destinations, other continents
- The travel group knows the company well

Question 4: On what grounds did you choose to work with a corporate travel group?
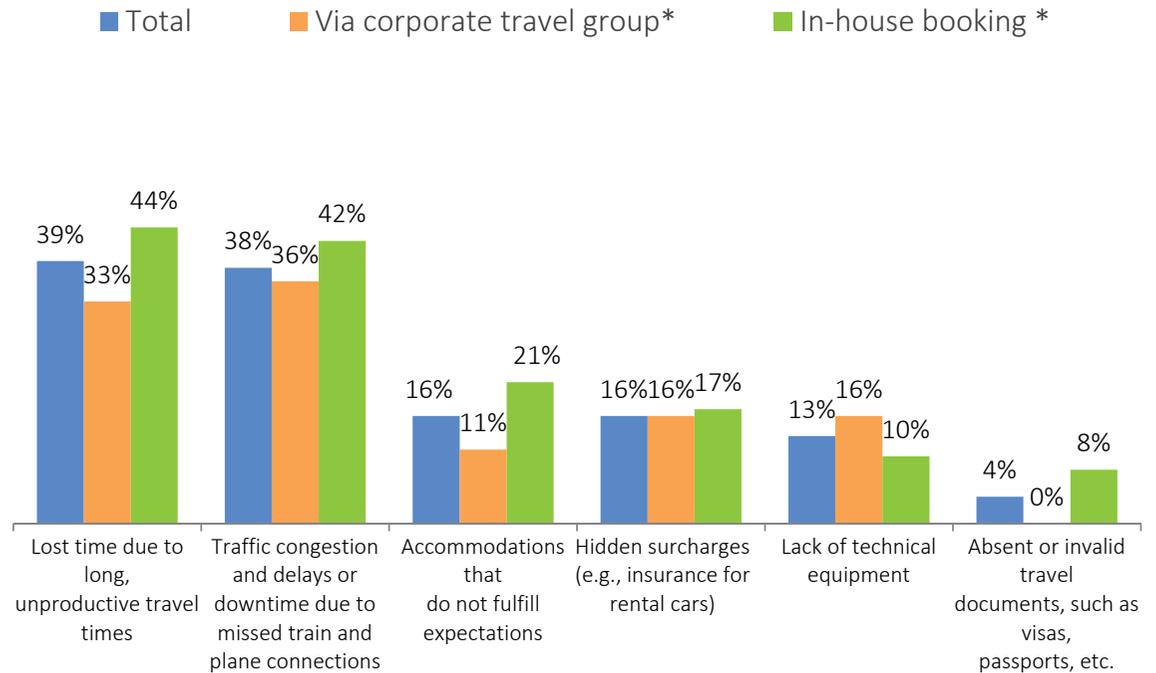Baseline: Respondents who work with a corporate travel group; N = 45 (Multiple answers)

BCD travel

Sitting by idly

About four out of ten companies have to contend regularly with lengthy travel times, traffic congestion or delays.
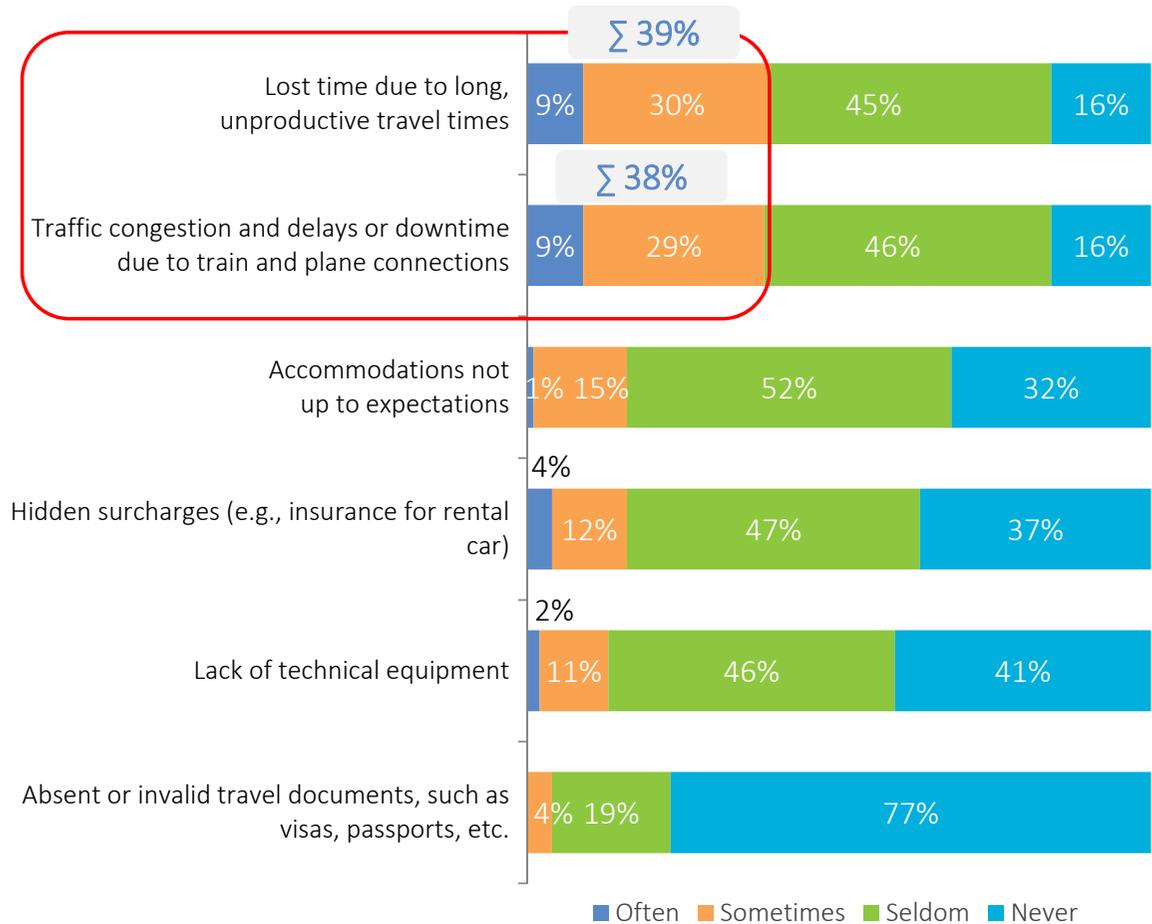
∑ 39%

Lost time due to long, unproductive travel times — 9% | 30% | 45% | 16%

∑ 38%

Traffic congestion and delays or downtime due to train and plane connections — 9% | 29% | 46% | 16%

Accommodations not up to expectations — 1% 15% | 52% | 32%

4%
Hidden surcharges (e.g., insurance for rental car) — 12% | 47% | 37%

2%
Lack of technical equipment — 11% | 46% | 41%

Absent or invalid travel documents, such as visas, passports, etc. — 4% 19% | 77%

■ Often   ■ Sometimes   ■ Seldom   ■ Never

Question 5: I will now read you a list of problems that could occur during corporate travel. How often do these problems occur for your company during corporate travel? Baseline: All respondents, N = 100 (Scaled question, sorted by "often" and "sometimes")
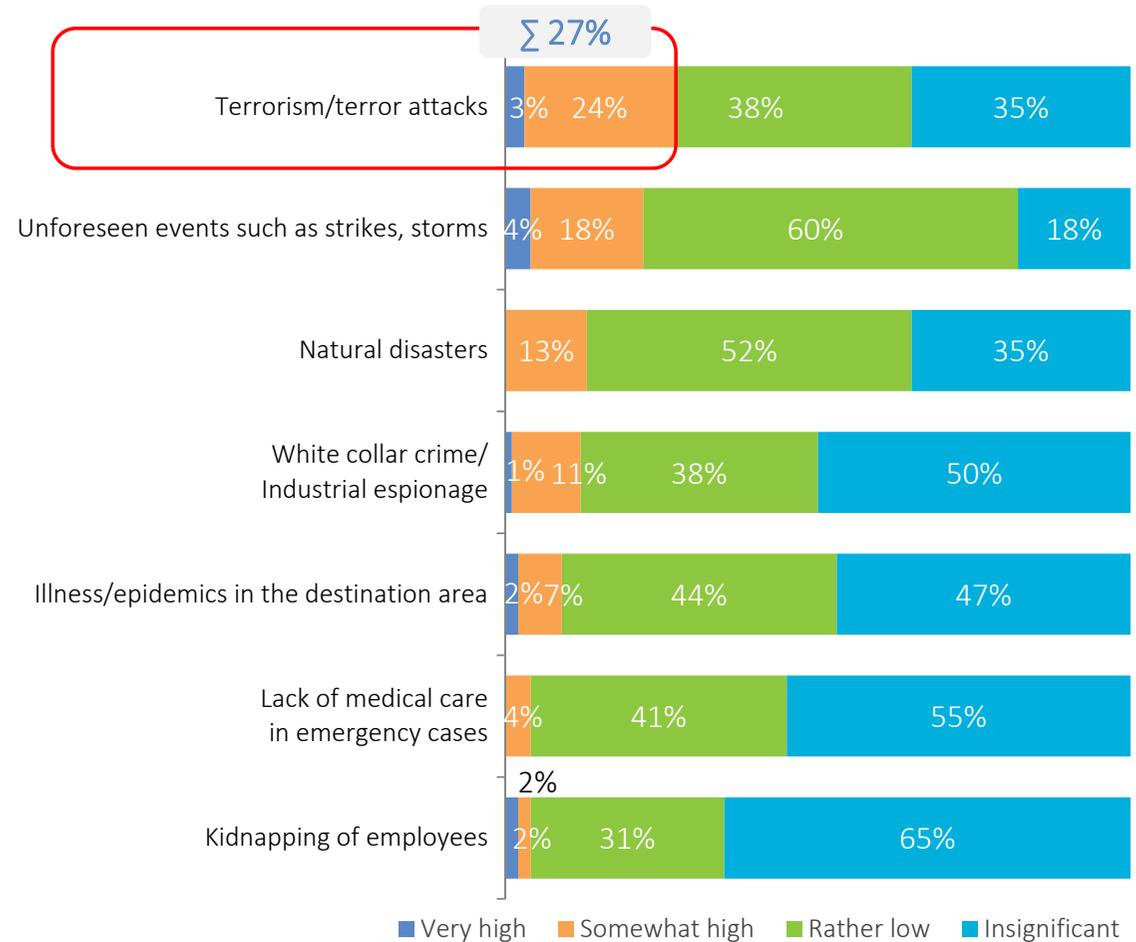
BCD travel

Time is money

Corporate travel group customers complain less frequently about long, unproductive travel times.

■ Total   ■ Via corporate travel group*   ■ In-house booking *

Category	Total	Via corporate travel group*	In-house booking *
Lost time due to long, unproductive travel times	39%	33%	44%
Traffic congestion and delays or downtime due to missed train and plane connections	38%	36%	42%
Accommodations that do not fulfill expectations	16%	11%	21%
Hidden surcharges (e.g., insurance for rental cars)	16%	16%	17%
Lack of technical equipment	13%	16%	10%
Absent or invalid travel documents, such as visas, passports, etc.	4%	0%	8%

*Excluding "Don't know"

Question 5: I will now read you a list of problems that could occur during corporate travel. How often do these occur in your company during corporate travel? Baseline: All respondents, N = 100 ("often" and "sometimes" sorted by "total")
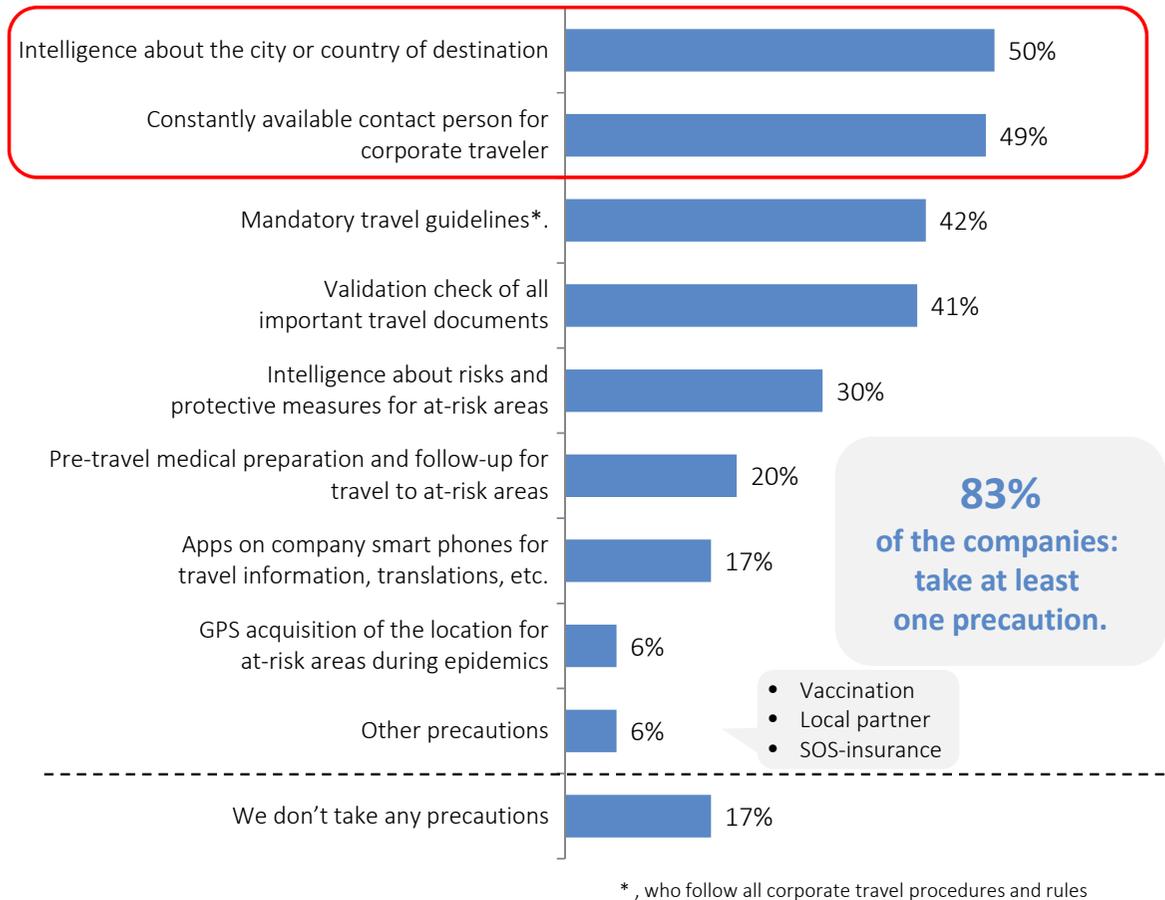
BCD travel

Real danger

The attacks in Paris and Brussels have left their mark. One out of every four companies estimates the risk of terrorism as high.

∑ 27%

Risk	Very high	Somewhat high	Rather low	Insignificant
Terrorism/terror attacks	3%	24%	38%	35%
Unforeseen events such as strikes, storms	4%	18%	60%	18%
Natural disasters		13%	52%	35%
White collar crime/ Industrial espionage	1%	11%	38%	50%
Illness/epidemics in the destination area	2%	7%	44%	47%
Lack of medical care in emergency cases		4%	41%	55%
Kidnapping of employees	2%	2%	31%	65%

■ Very high   ■ Somewhat high   ■ Rather low   ■ Insignificant

Question 6: The next question concerns risks during corporate travel. In your opinion how high is the probability that such a thing might occur? Baseline: All respondents, N = 100 (Scaled question, sorted by "very high" and "somewhat high")

BCD travel

Intelligence from a single source

The top-2 precautions are Intelligence about the destination city or country and availability of a contact person.

Precaution	%
Intelligence about the city or country of destination	50%
Constantly available contact person for corporate traveler	49%
Mandatory travel guidelines*.	42%
Validation check of all important travel documents	41%
Intelligence about risks and protective measures for at-risk areas	30%
Pre-travel medical preparation and follow-up for travel to at-risk areas	20%
Apps on company smart phones for travel information, translations, etc.	17%
GPS acquisition of the location for at-risk areas during epidemics	6%
Other precautions	6%
We don't take any precautions	17%

83%
of the companies:
take at least
one precaution.

- Vaccination
- Local partner
- SOS-insurance

* , who follow all corporate travel procedures and rules

Question 7: Precautions can be taken against specific risks of corporate travel, if you take prior protective measures and prepare intelligence. Which of the following precautions are taken in your company?
Baseline: All respondents; N = 100 (multiple responses)

BCD travel

Customers of corporate travel groups more frequently take risk-reducing precautions for corporate travelers.

Risk-reducing precautions for corporate travel		Corporate travel group*	
	Total	Yes	No
Basis	100	45	52
Intelligence about city or country of destination	50%	**56%**	48%
Constantly available contact person for the corporate traveler	49%	**60%**	**42%**
Mandatory travel guidelines that contain all the procedures and rules for corporate travel	42%	**49%**	38%
Validation check of all important travel documents	41%	**53%**	**33%**
Intelligence about risks and protective measures for at-risk areas	30%	31%	31%
Pre-travel medical preparation and follow-up for travel to at-risk areas	20%	**33%**	**10%**
Apps on company smart phones for travel information, translations, etc.	17%	**24%**	**10%**
GPS acquisition of the location for at-risk areas during epidemics	6%	7%	6%
Other precautions	6%	7%	6%
We don't take any precautions	17%	**11%**	19%

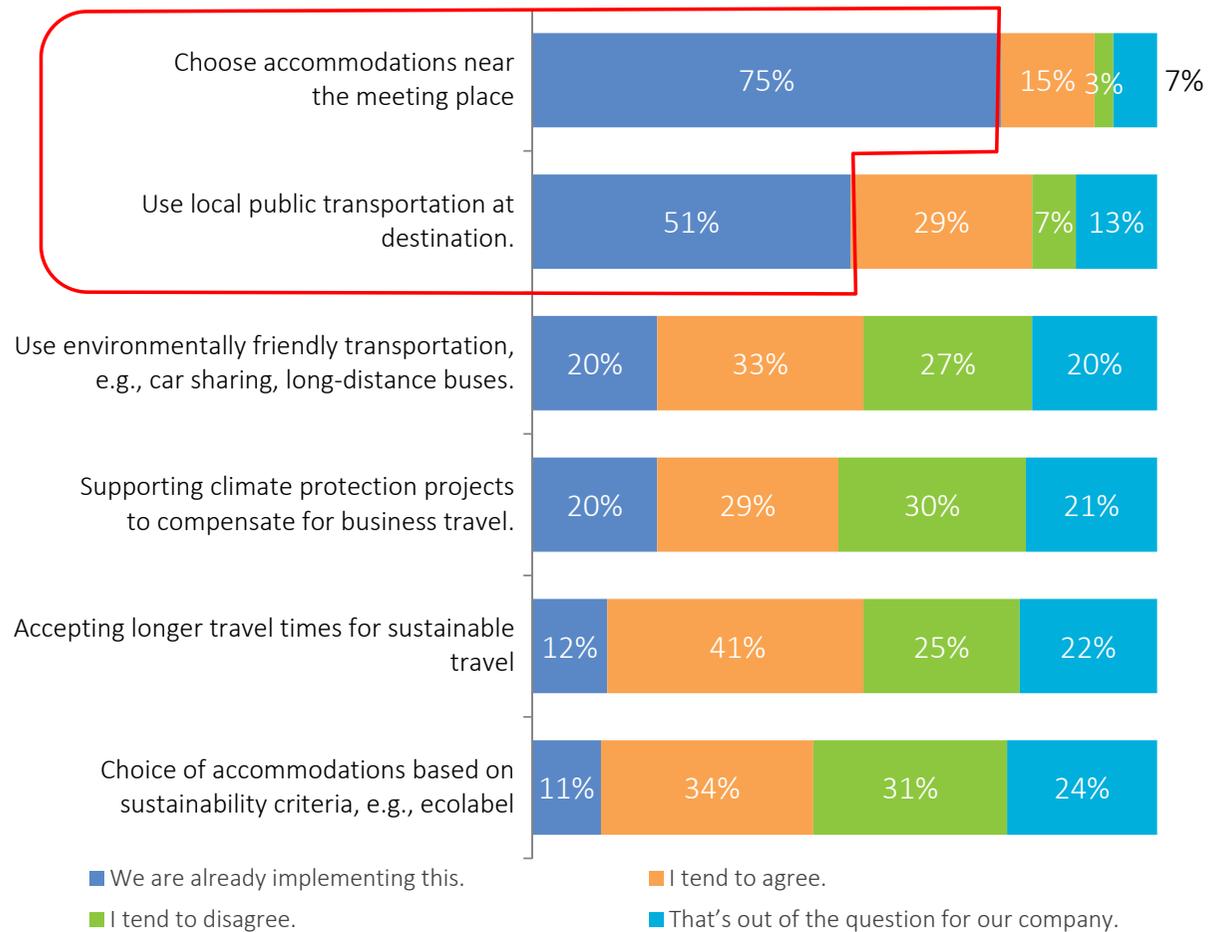■ at least 5% above the average
■ at least 5% below the average

* Excluding "Don't know"

Question 7: Precautions can be taken against specific risks of corporate travel, if you take prior protective measures and prepare intelligence.
Which of the following precautions are taken in your company? Baseline: All respondents; N = 100 (multiple responses)

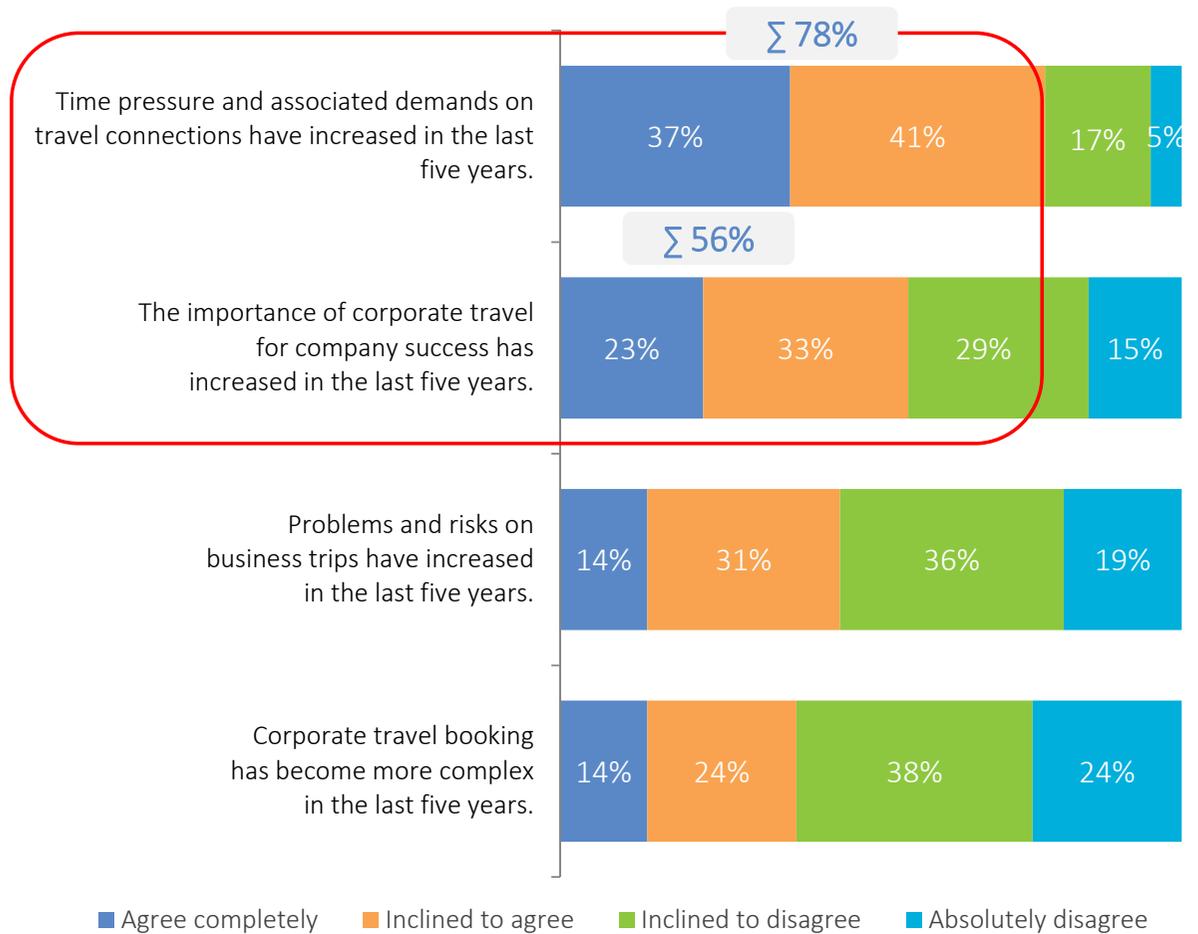**BCD● travel**

Short distances and local traffic

Top sustainability precautions: Lodging near the meetings and use of public transportation local to destination.

Choose accommodations near the meeting place: 75% | 15% | 3% | 7%

Use local public transportation at destination: 51% | 29% | 7% | 13%

Use environmentally friendly transportation, e.g., car sharing, long-distance buses: 20% | 33% | 27% | 20%

Supporting climate protection projects to compensate for business travel: 20% | 29% | 30% | 21%

Accepting longer travel times for sustainable travel: 12% | 41% | 25% | 22%

Choice of accommodations based on sustainability criteria, e.g., ecolabel: 11% | 34% | 31% | 24%

■ We are already implementing this.
■ I tend to agree.
■ I tend to disagree.
■ That's out of the question for our company.

Question 8: This question concerns the theme of sustainability. Next I will read you a list of steps that can help make corporate travel sustainable. How does your company measure up?
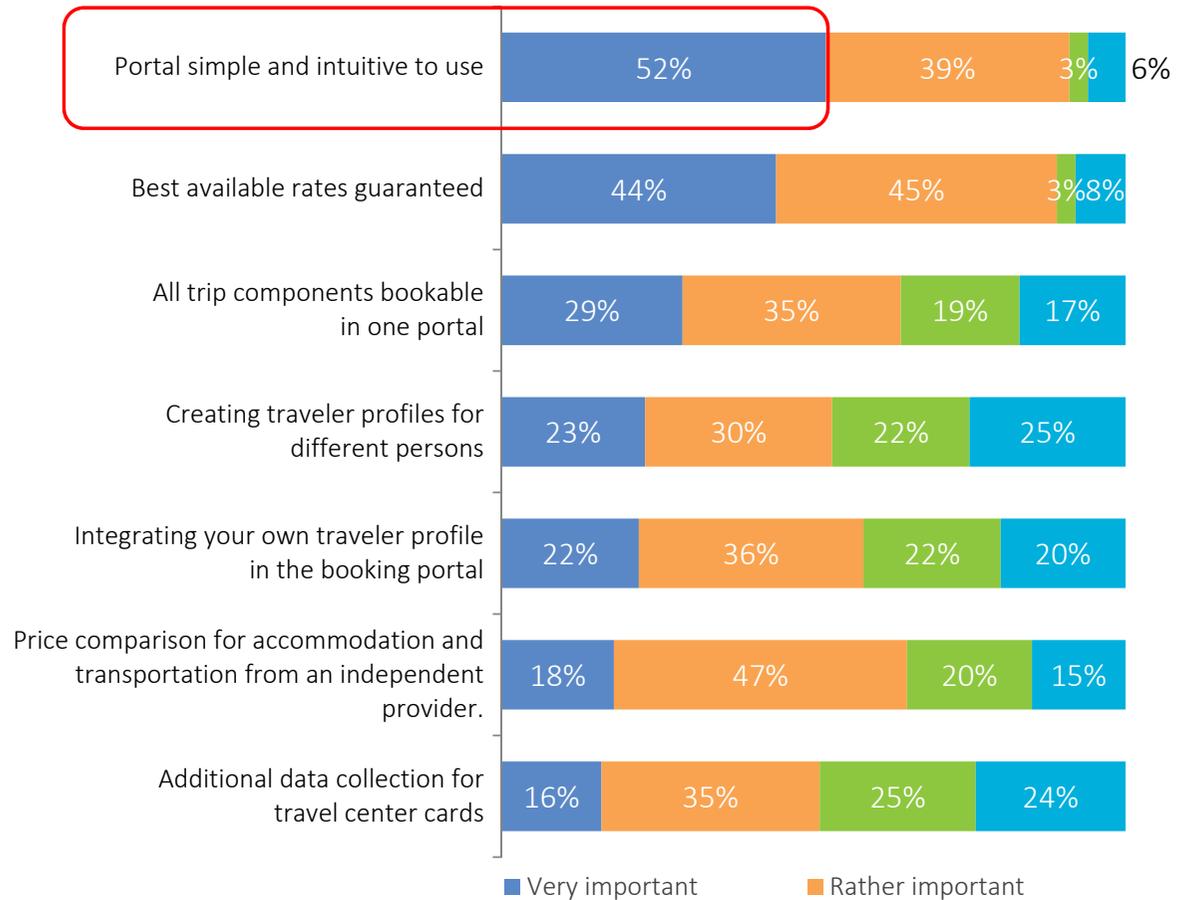Baseline: All respondents, N = 100 (Scaled question, sorted by "we are already Implementing this")

BCD travel

Fast and faster

About eight out of ten companies declare that time pressure has increased in the last five years for corporate travel.

∑ 78%

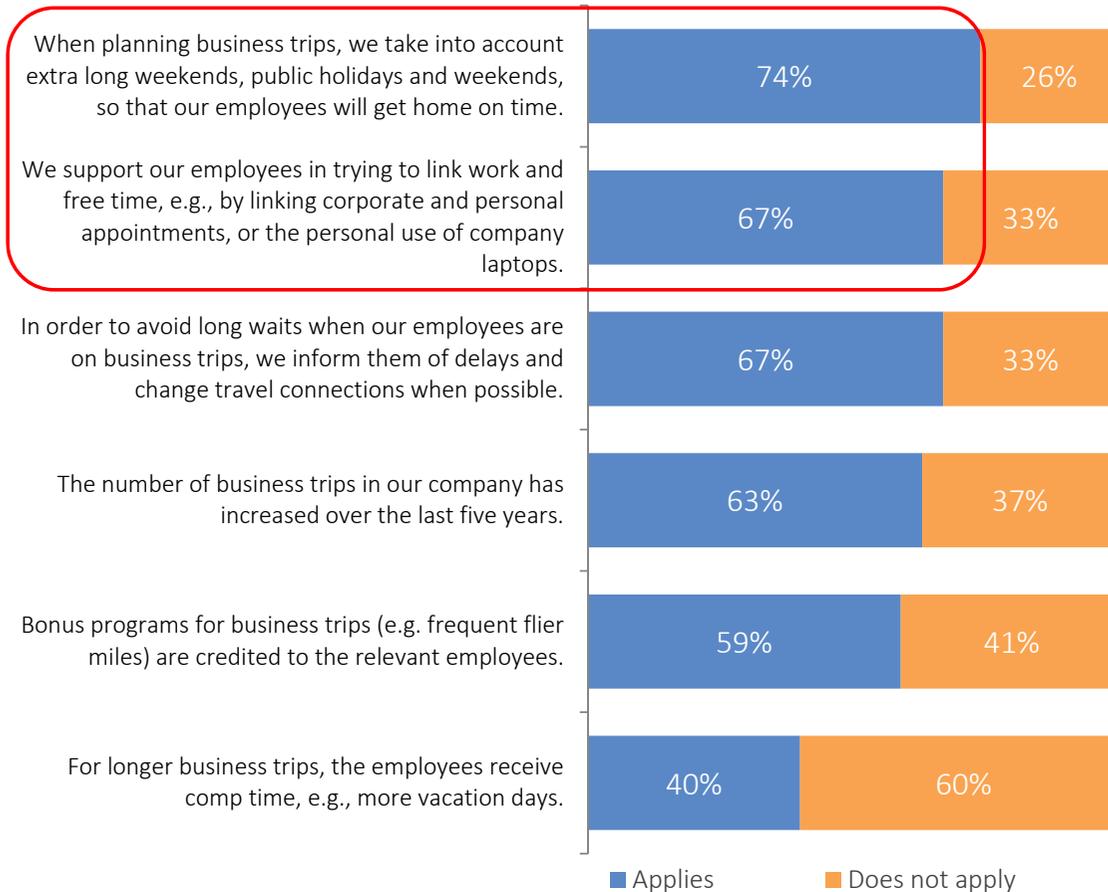**Time pressure and associated demands on travel connections have increased in the last five years.**
- 37% | 41% | 17% | 5%

∑ 56%

The importance of corporate travel for company success has increased in the last five years.
- 23% | 33% | 29% | 15%

Problems and risks on business trips have increased in the last five years.
- 14% | 31% | 36% | 19%

Corporate travel booking has become more complex in the last five years.
- 14% | 24% | 38% | 24%

- ■ Agree completely
- ■ Inclined to agree
- ■ Inclined to disagree
- ■ Absolutely disagree

Question 9: In the next question I will read you a list of statements on the theme of corporate travel: To what degree do you agree with these statements? Baseline: All respondents, N = 100 (Scaled question, sorted by "I'm completely in agreement" and "I'm inclined to agree")

BCD travel

As simple as possible

Intuitive and simple to use are the most important characteristics of an online booking portal for corporate travel.

	Very important	Rather important		
Portal simple and intuitive to use	52%	39%	3%	6%
Best available rates guaranteed	44%	45%	3%	8%
All trip components bookable in one portal	29%	35%	19%	17%
Creating traveler profiles for different persons	23%	30%	22%	25%
Integrating your own traveler profile in the booking portal	22%	36%	22%	20%
Price comparison for accommodation and transportation from an independent provider.	18%	47%	20%	15%
Additional data collection for travel center cards	16%	35%	25%	24%

■ Very important   ■ Rather important

Question 10: Next I will read you a number of points around the theme of booking a business trip online. Please tell me if you find this point very important, somewhat important, rather unimportant or unimportant.
Baseline: All respondents, N = 100 (Scaled question, sorted by "very important")

BCD travel

Balance counts

When planning corporate travel, three out of four companies take extra-long weekends, public holidays, and weekends into account.

When planning business trips, we take into account extra long weekends, public holidays and weekends, so that our employees will get home on time.
74% | 26%

We support our employees in trying to link work and free time, e.g., by linking corporate and personal appointments, or the personal use of company laptops.
67% | 33%

In order to avoid long waits when our employees are on business trips, we inform them of delays and change travel connections when possible.
67% | 33%

The number of business trips in our company has increased over the last five years.
63% | 37%

Bonus programs for business trips (e.g. frequent flier miles) are credited to the relevant employees.
59% | 41%

For longer business trips, the employees receive comp time, e.g., more vacation days.
40% | 60%

■ Applies   ■ Does not apply

Question 11: Finally I will read you another list of statements about corporate travel and work-life-balance and in your company. To what extent do these statements apply to your company?
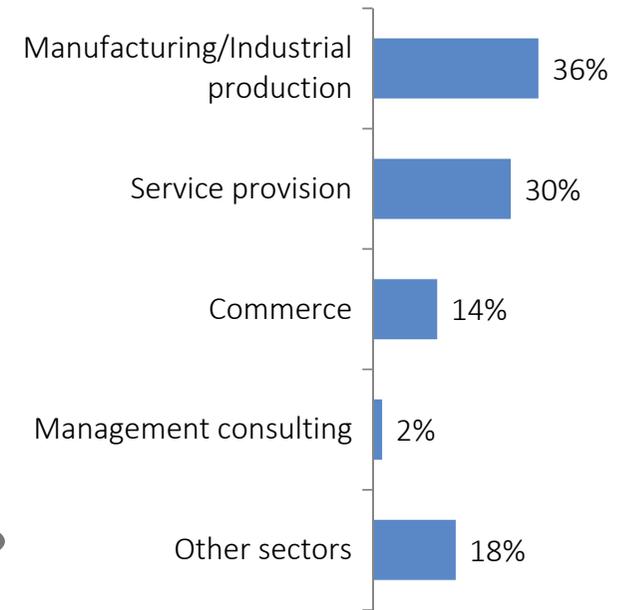Baseline: All respondents, N = 100 (Scaled question, sorted by "Applies")

BCD travel

Compensatory time for longer business trips is more easily budgeted in larger companies.

Statement: "Applies"		Employees			Corporate travel group*	
	Total	50 to 99 employees	100 to 249 employees	250+ employees	Yes	No
Basis	100	48	31	21 ⚠	45	52
When planning business trips, we take into account extra long weekends, public holidays and weekends, so that our employees will get home on time.	**74%**	71%	71%	**86%**	73%	75%
We support our employees in trying to link work and free time, e.g., by linking corporate and personal appointments, or the personal use of company laptops.	**67%**	**73%**	68%	**52%**	**76%**	**62%**
In order to avoid long waits when our employees are on business trips, we inform them of delays and change travel connections when possible.	**67%**	63%	**81%**	**57%**	**73%**	65%
The number of business trips in our company has increased over the last five years.	**63%**	**54%**	**77%**	62%	**87%**	**44%**
Bonus programs for business trips (e.g. frequent flier miles) are credited to the relevant employees.	**59%**	**50%**	**65%**	**71%**	**76%**	**44%**
For longer business trips, the employees receive comp time, e.g., more vacation days.	**40%**	**33%**	**45%**	**48%**	44%	**35%**

■ at least 5% above the average
■ at least 5% below the average   ⚠ Small sample

*Excluding "Don't know"

Question 11: Finally I will read you another list of statements about corporate travel and work-life balance in your company. To what extent do these statements apply to your company?
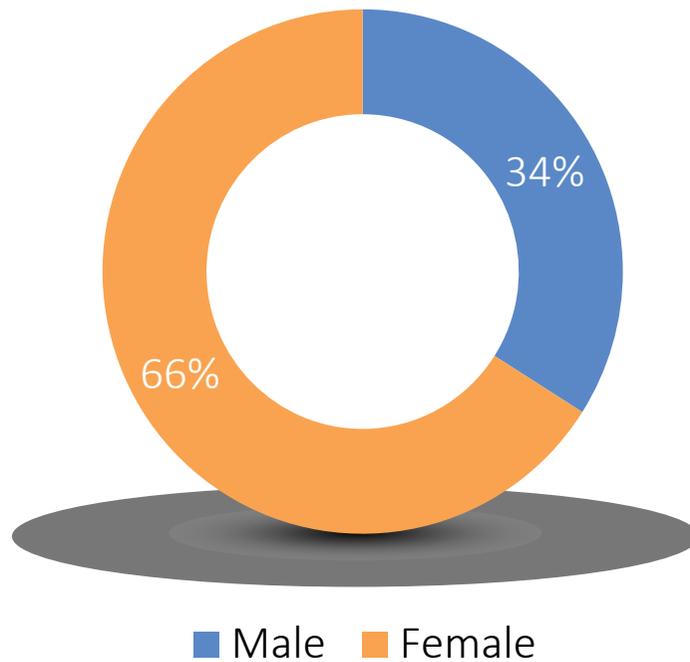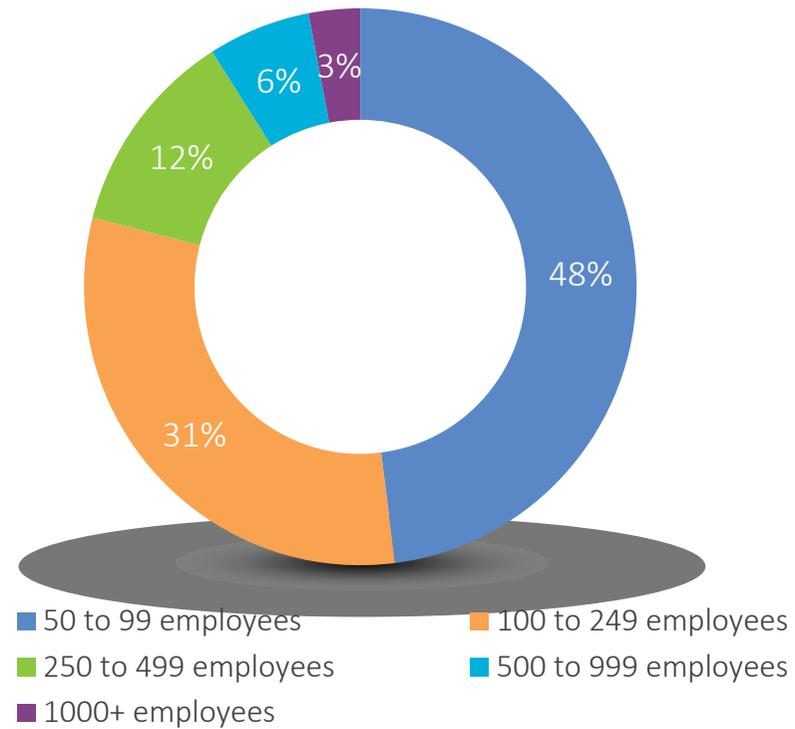Baseline: All respondents, N = 100 (Scaled question)

BCD travel

Statistics

BCD travel
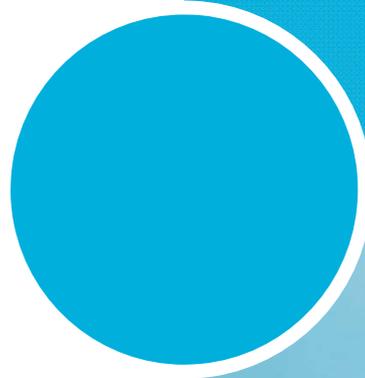
Statistics

Gender
Sector

34%

66%

■ Male ■ Female

Manufacturing/Industrial production — 36%

Service provision — 30%

Commerce — 14%

Management consulting — 2%

Other sectors — 18%

Baseline: All respondents; N = 100 (single response)

BCD travel

Statistics
Employees

- 48%
- 31%
- 12%
- 6%
- 3%

- ■ 50 to 99 employees
- ■ 100 to 249 employees
- ■ 250 to 499 employees
- ■ 500 to 999 employees
- ■ 1000+ employees

Baseline: All respondents; N = 100 (single response)

BCD travel

Thank **you**

BCD travel