

# HOW TO BUILD A TRAVELER SURVEY

## 8 steps to building surveys that business travelers will actually take

Asking business travelers what they think is an effective way to get the insights you need to build a strong travel program or improve policies already in place.

### 1 Outline survey goals.

For example, your goal might be to understand what your travelers need to feel safe getting back on the road after a prolonged period of no travel. Keep the goal in mind when planning your questions.



### 2

### Define stakeholder and survey review process.

Involve the right stakeholders in the process – from designing the questions to reviewing the data insights pulled from it. You may need to partner with colleagues in technology, data analysis, travel risk management, meetings, or payment and expense management.

### 3

### K.I.S.S. Keep it simple and specific.

Use clear language. Keep the survey length and questions as short as possible. Ideally, the survey won't take more than 8 minutes to complete.

### 4

### Select a user-friendly survey tool.

Use an already approved company survey platform or pick one of the many available options. Make sure your tool is intuitive; meets your needs for the types of questions you wish to ask; and has built-in analytics capabilities.

### 5

### Plan survey frequency and timing.

Survey your travelers as often as you need to but don't overwhelm them. Monitor participation and decide how often to launch future surveys based on that.

Distribute the survey when it makes the most sense, e.g., before and after travel policy rollouts or changes to gauge the policy's effectiveness. Check the calendar for company days' off. Don't send surveys when your targeted audience is likely out of office.

Decide how long your survey should remain open. Best practice for BCD is generally a two-week survey window. Send reminders three days to one week after the survey opens. If the response is underwhelming – send a reminder email, preferably with a catchy subject line and call to action.



### 6

### Test it.

Ask a few people to take a survey "practice test," looking for mistakes, unclear questions or responses, and overall ease of use.

### 7

### Report back.

Grow confidence in your travel program by sharing survey results and demonstrating how they'll be put to practical use within your organization.

### 8

### Think long term.

To help get an optimal number of responses each time you survey, focus on building a traveler panel diverse in geography, language, gender, age and tenure. The better your survey participants represent the actual company business travelers, the more relevant your insights.



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