



Travel buyer insights:

SOURCING AND SUPPLIER STRATEGIES

BY BCD TRAVEL RESEARCH & INTELLIGENCE



About the survey

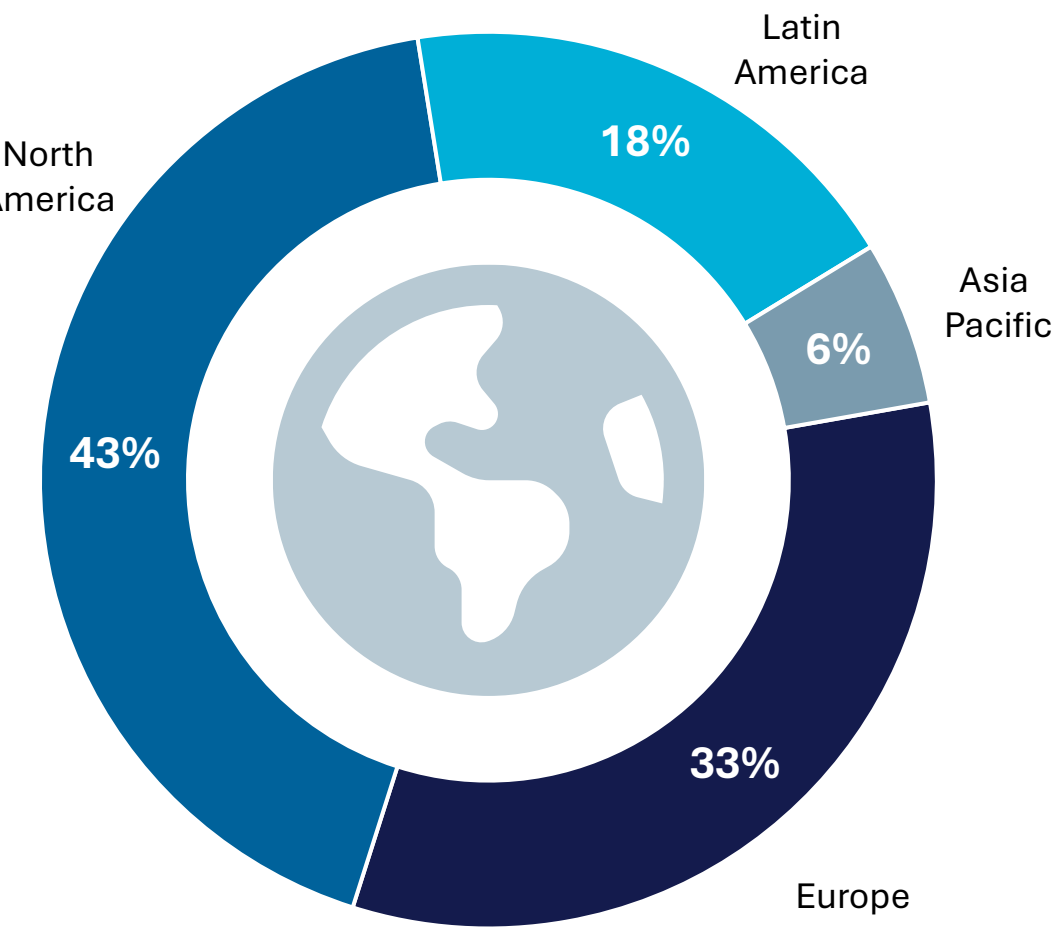
In this survey, we look at how organizations source and manage their travel suppliers. We focus on procurement strategies, priorities, key challenges and supplier management trends that influence travel program performance.

The findings are based on an online survey of 132 travel buyers worldwide, conducted in August 2025.

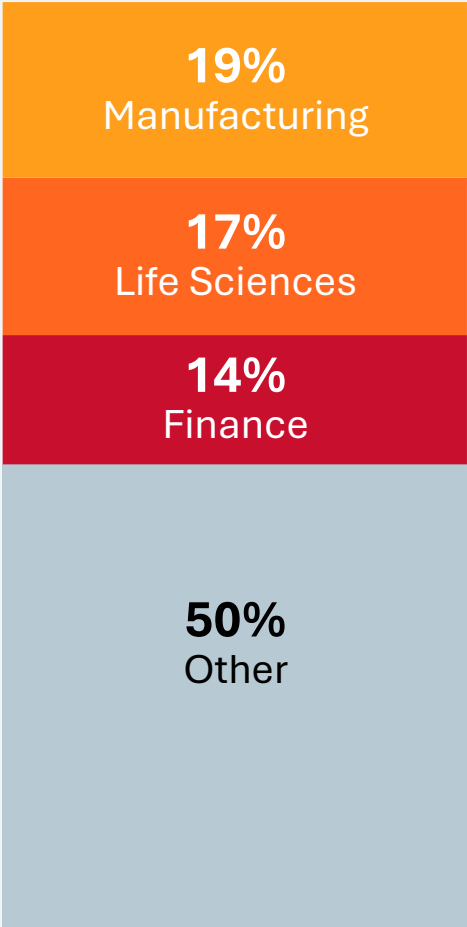


Who we surveyed

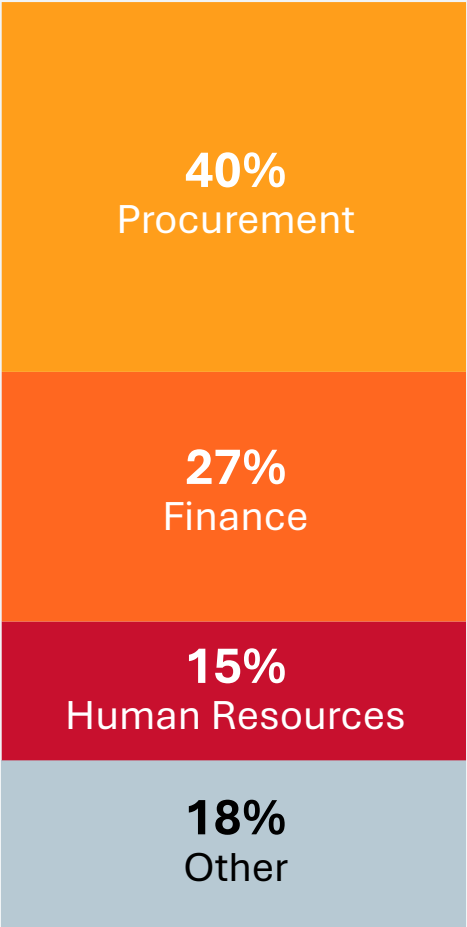
Where they're based



Top-three industries

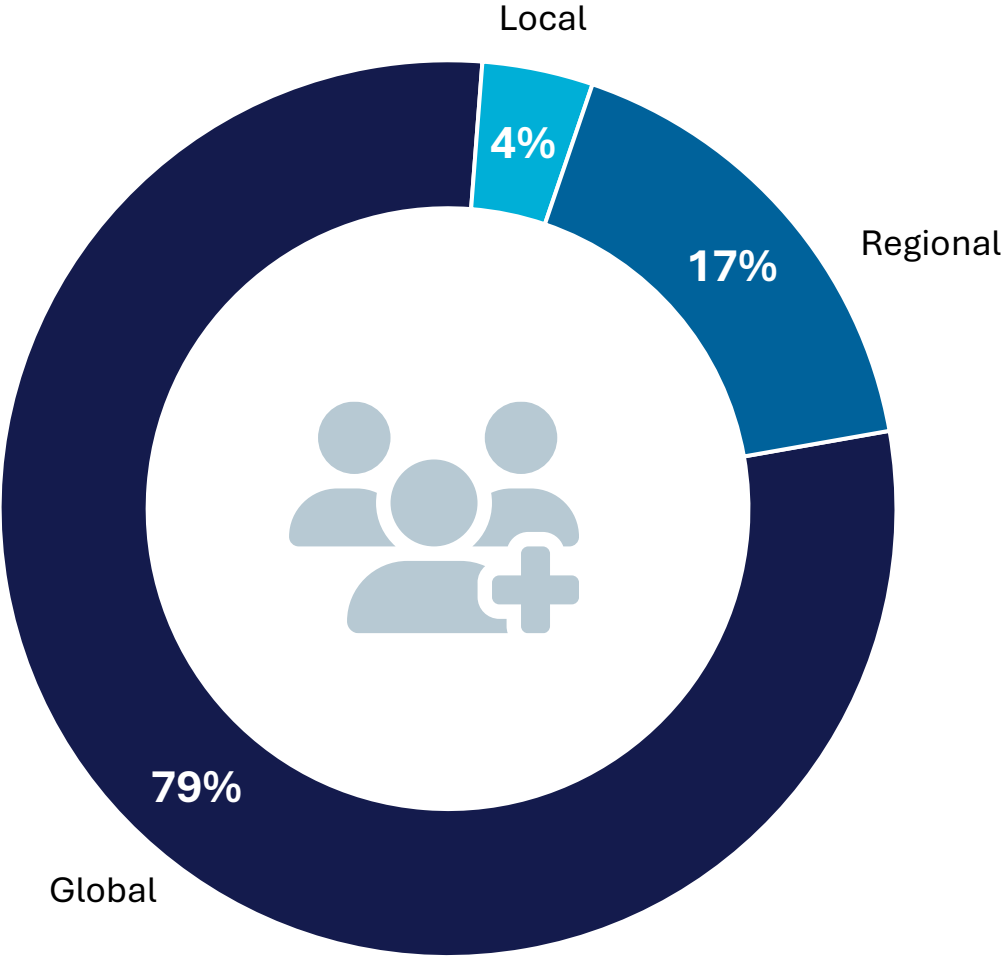


Reporting line

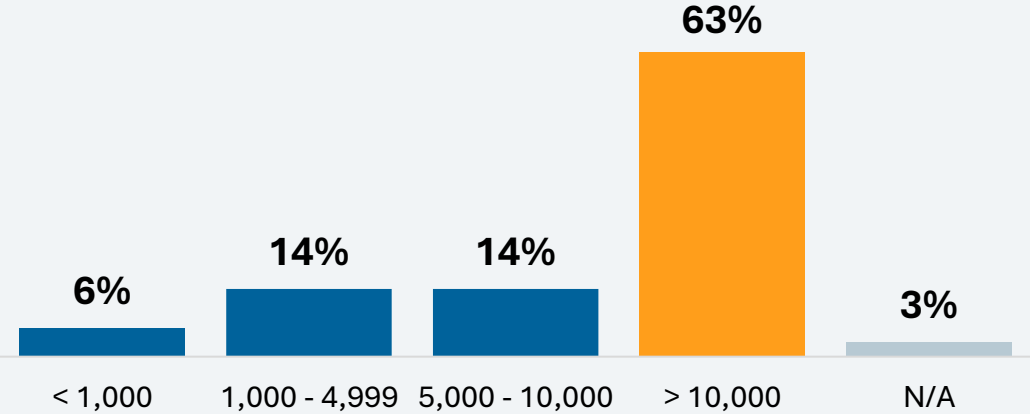


Who we surveyed

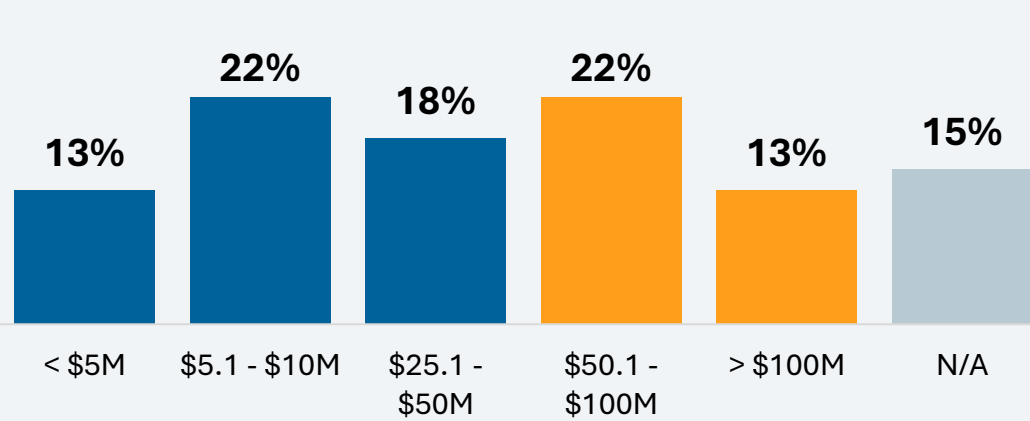
Travel program scope



Company size

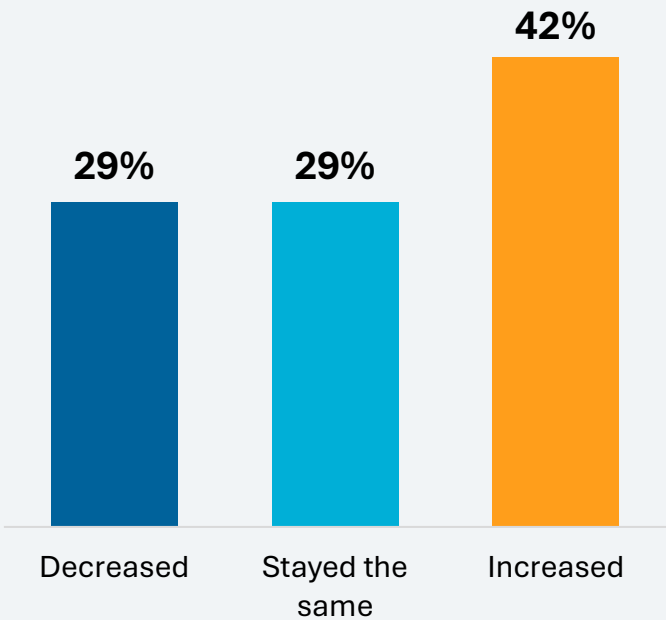


Travel spend



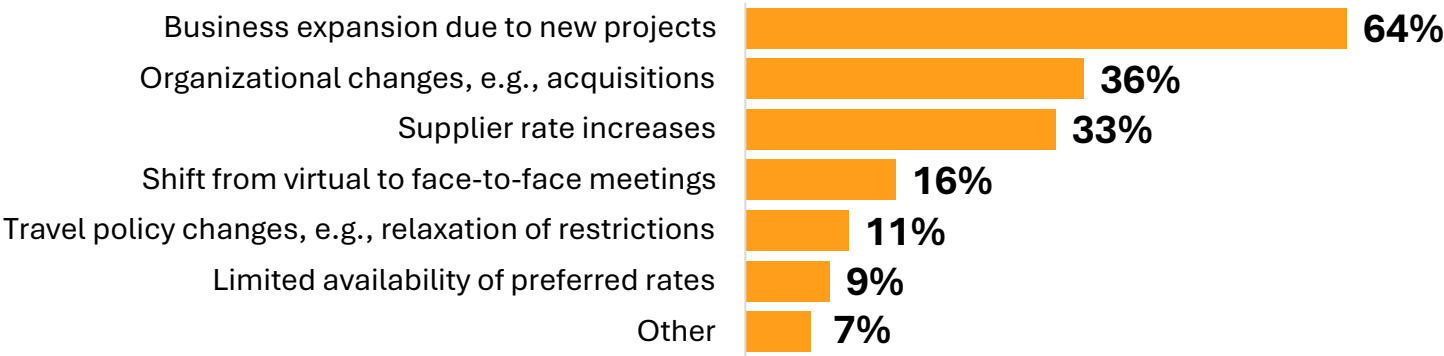
Travel spend 2025

Over 40% of travel buyers report increased travel spend in 2025, driven primarily by business growth. Around 30% note a decrease in spend, mostly due to cost cutting.



Q: How has your company’s travel spend changed in 2025 compared to the previous year?

Reasons for increase



Reasons for decrease

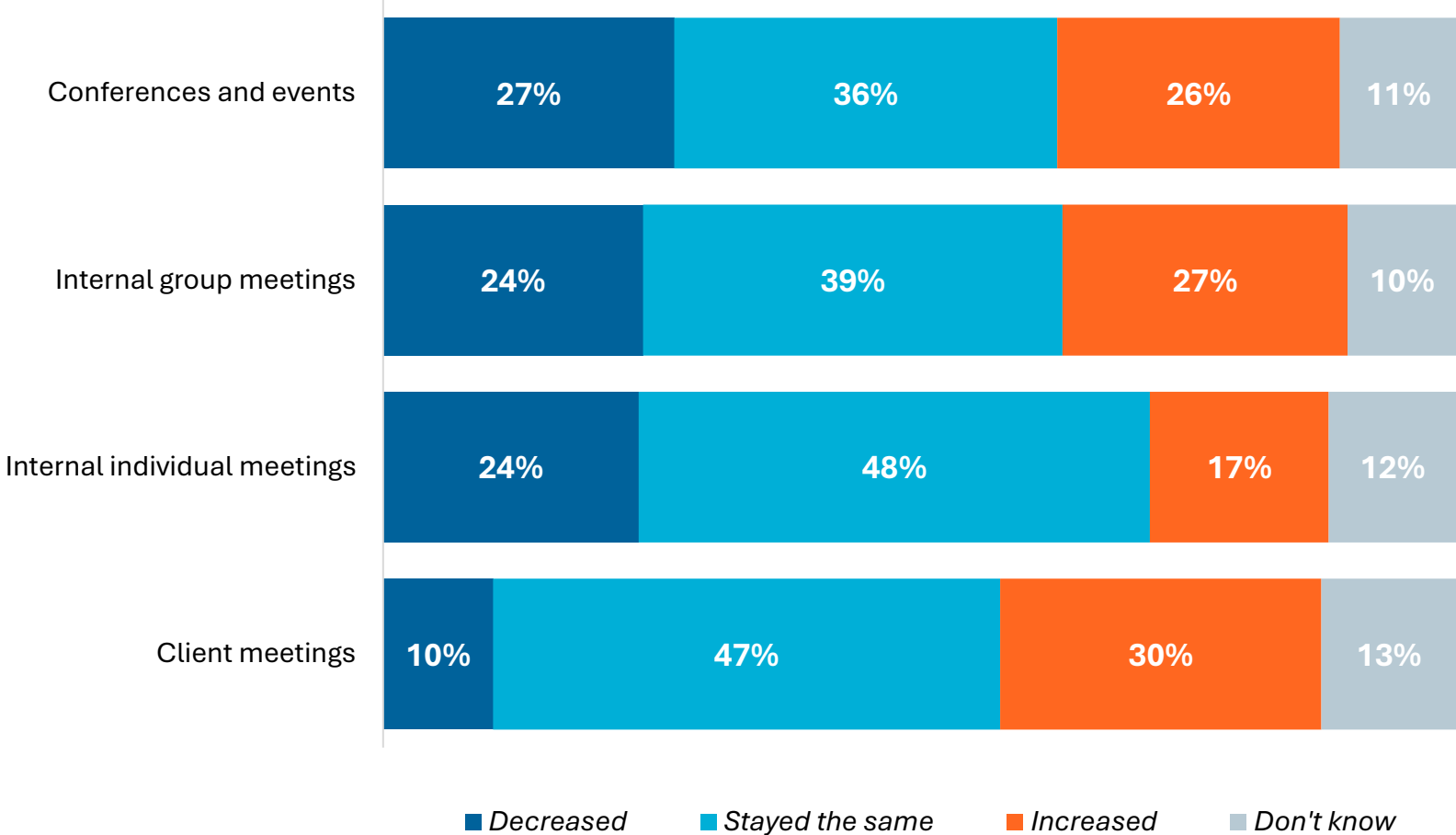


Q: What are the reasons your company’s travel spend has increased/decreased in 2025? Select all that apply.



Travel spend by meetings type

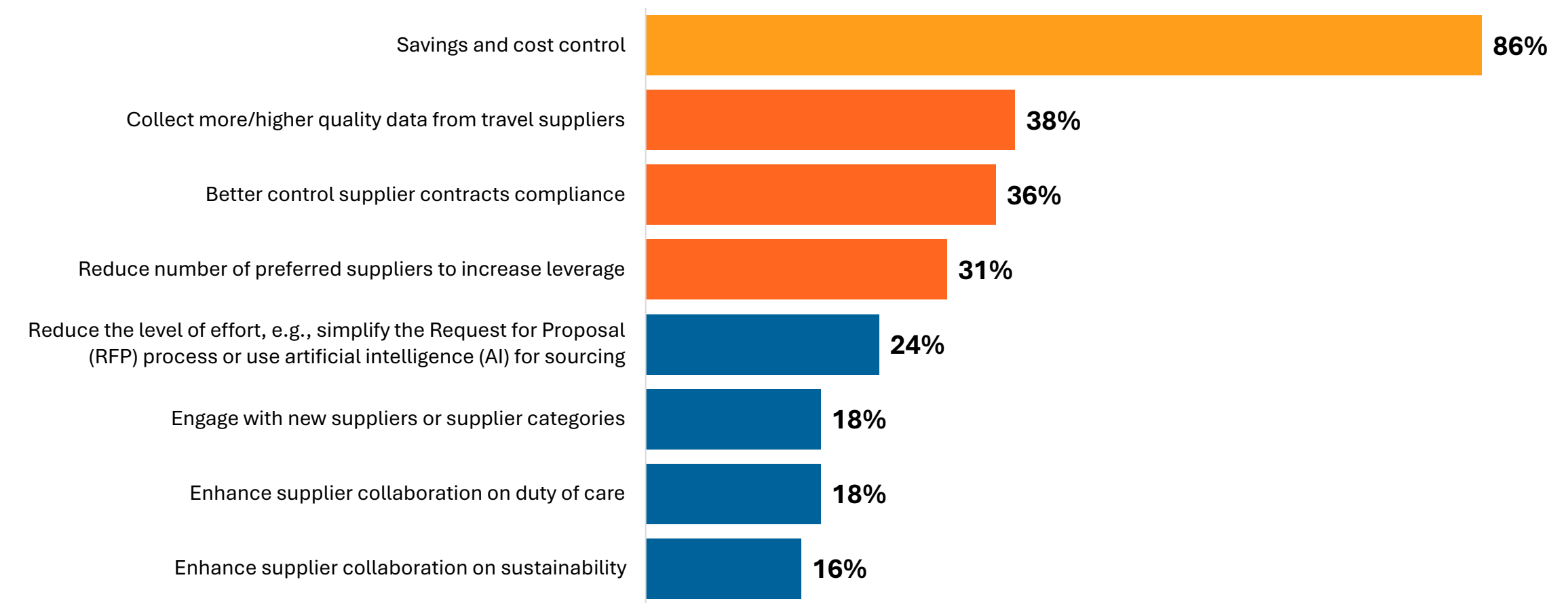
Over the last year, travel spend on client meetings rose more significantly compared to other meeting types.



Q: How has your 2025 travel spend changed by meeting type?

Sourcing priorities

Most travel buyers prioritize cost control in their sourcing decisions. Data collection, contract compliance and supplier consolidation are also in the top-four.



Q: What are your travel team's priorities related to supplier management and sourcing? Select the top three.

Sourcing stakeholders

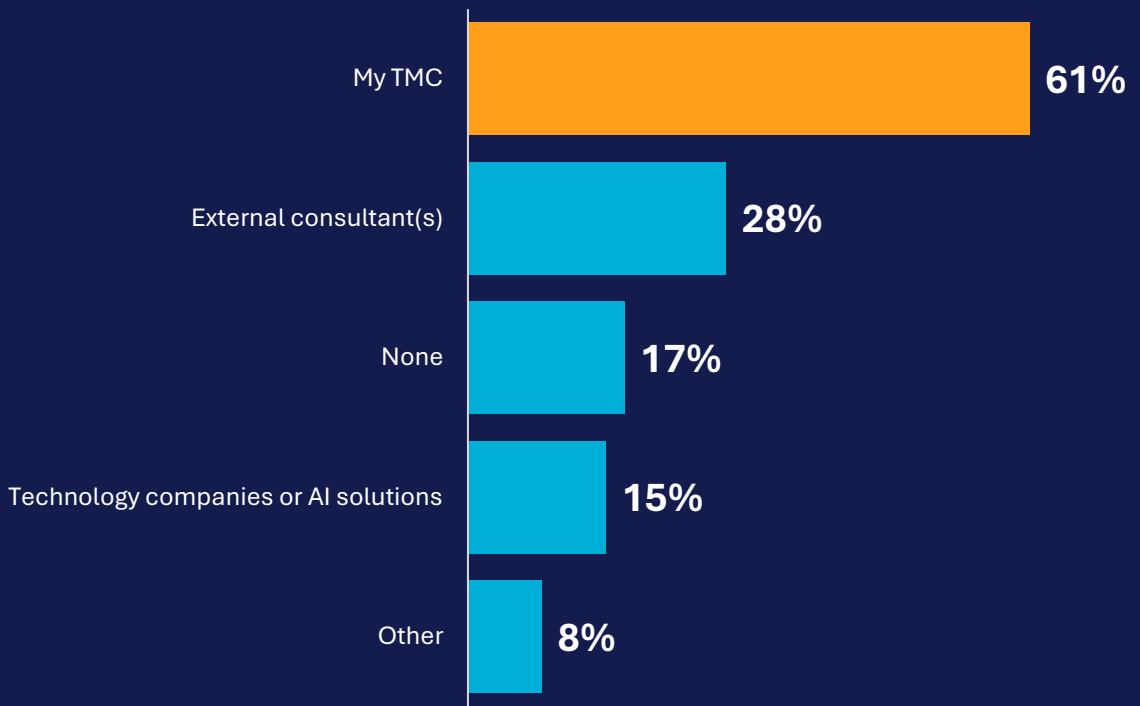
In addition to travel management, procurement, finance and security departments are most frequently involved in sourcing travel suppliers.



Q: In your company, what stakeholders are involved in travel sourcing?
Select all that apply.

Third-parties for sourcing

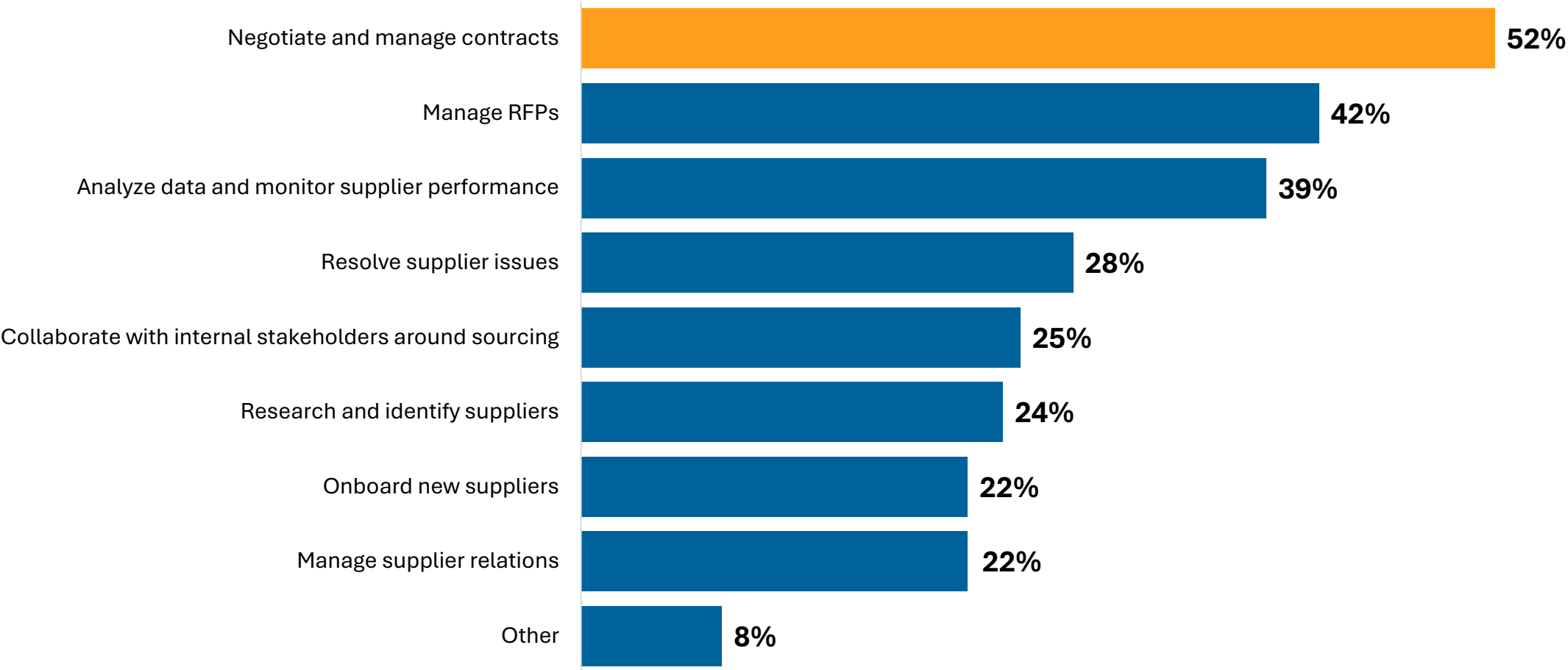
Six in 10 buyers rely on their travel management company (TMC) for support with sourcing, while roughly three in 10 engage external consultants.



Q: What third-parties do you use to assist with travel sourcing? Select all that apply

Sourcing tasks

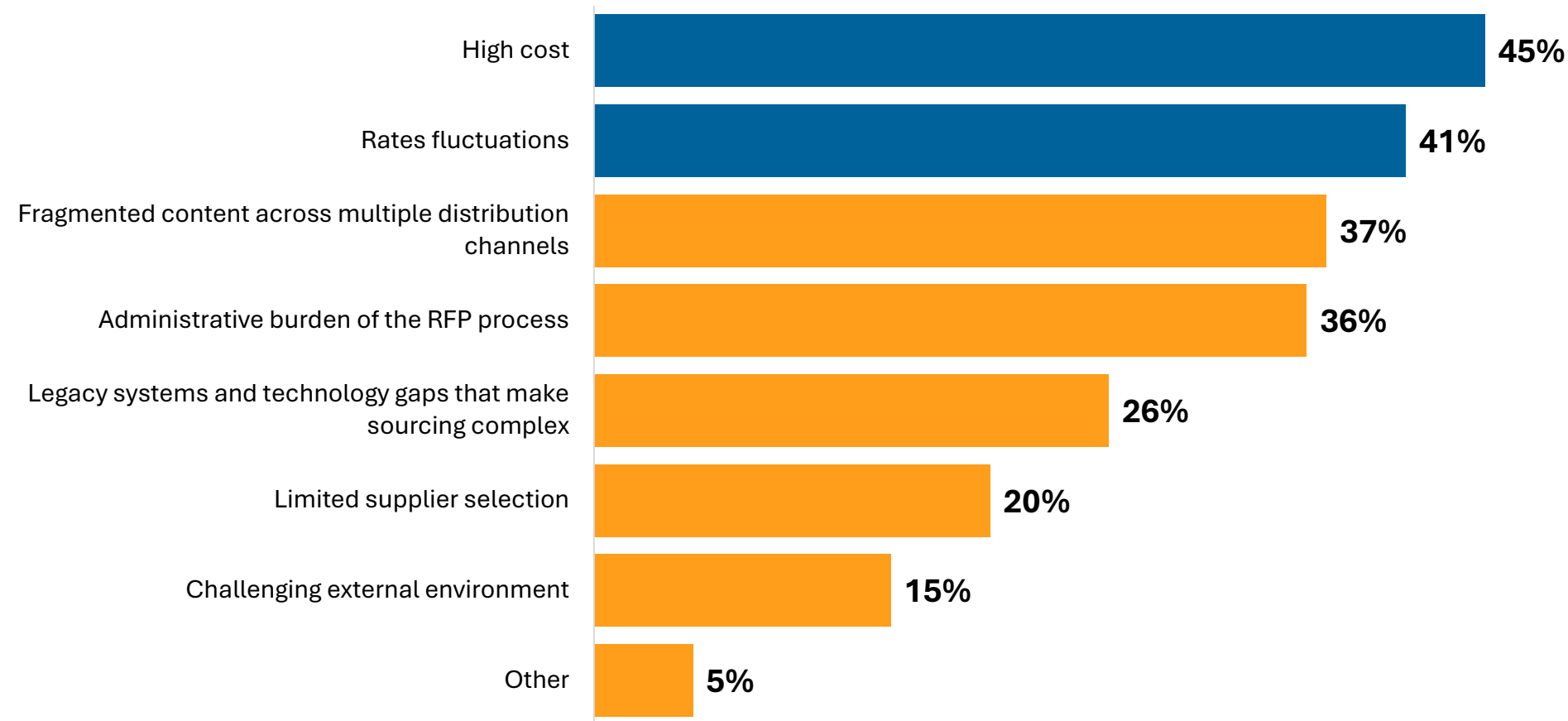
Cited by over half, contract negotiations and management tops the list of the most time-consuming sourcing tasks. It's followed by managing Requests for Proposals (RFPs) and monitoring supplier performance.



Q: Which tasks related to sourcing and supplier management are the most time-consuming for your team? Select all that apply.

Sourcing challenges

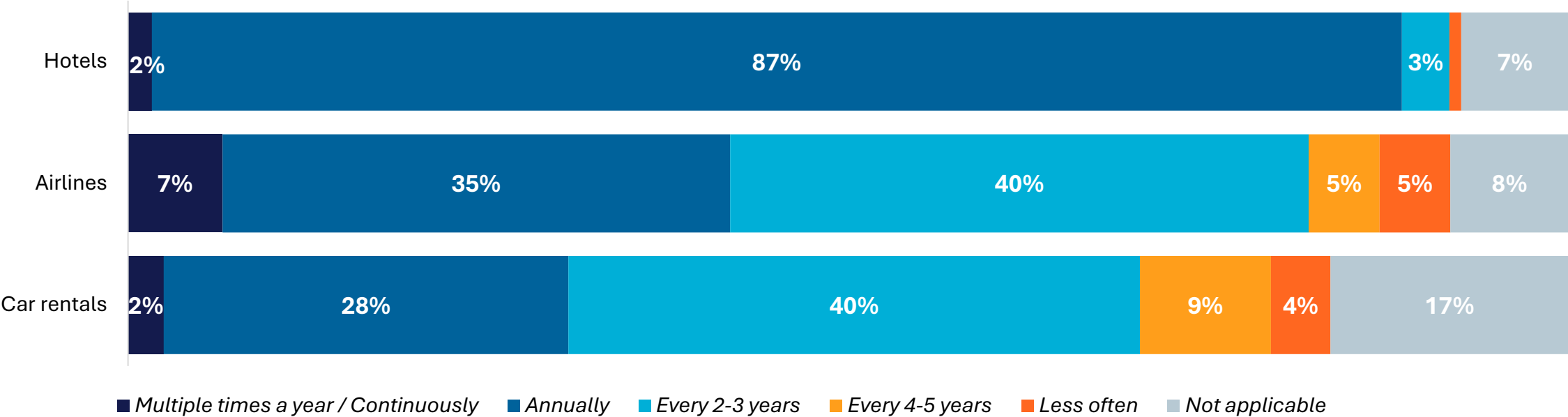
Pricing challenges lead the list of travel buyers' concerns when sourcing travel suppliers: High costs and rate fluctuations are cited by over 40% of respondents.



Q: What challenges do you face when sourcing travel suppliers? Select the top three.

Frequency of contracts negotiation

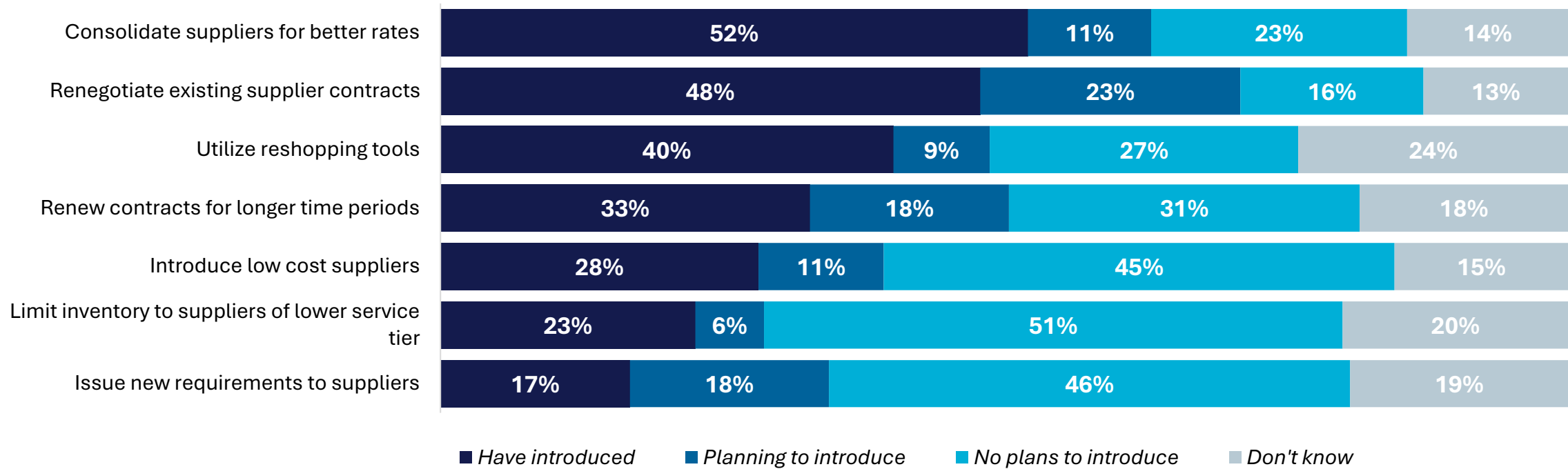
Across supplier categories, hotel agreements stand out for their consistency, with 87% being renewed annually. Airline and car rental contracts tend to be of a longer duration.



Q: How often do you negotiate travel supplier agreements? Select what applies in each category.

Cost containment measures

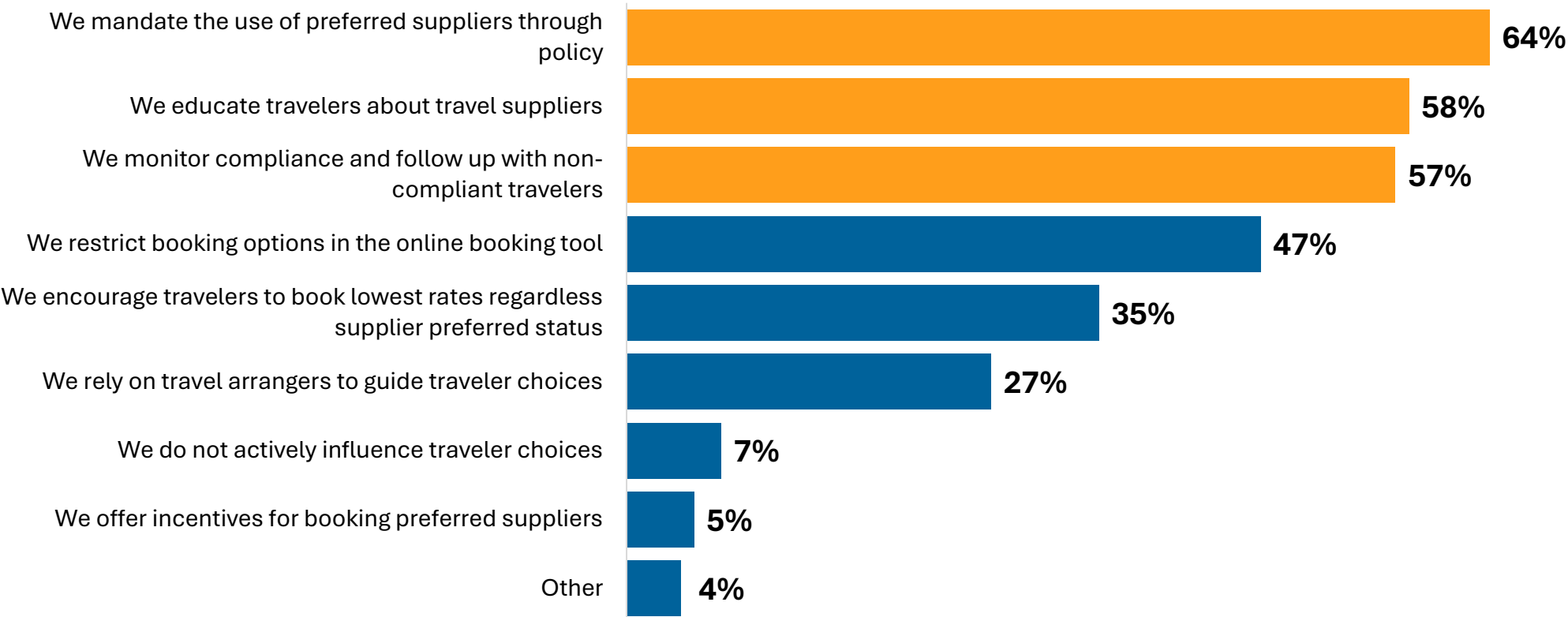
Travel buyers use various strategies to lower supplier costs: The common ones include supplier consolidation, renegotiation of existing agreements and the use of re-shopping tools, each adopted by 40-50%.



Q: Have you introduced or are you planning to introduce cost containment measures to your travel sourcing strategy? Select what applies.

Traveler influence

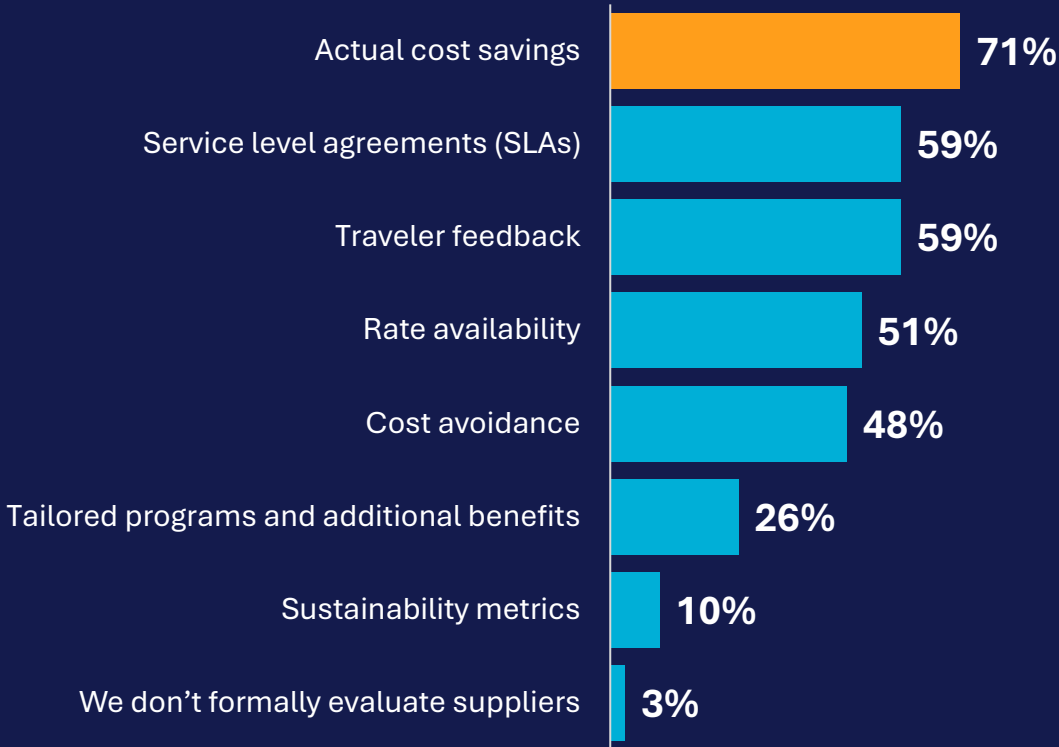
Two-thirds of companies mandate the use of preferred travel suppliers, while one-third prioritize the lowest rates regardless of supplier status.



Q: How do you influence your travelers in supplier selection? Select all that apply.

Supplier evaluation

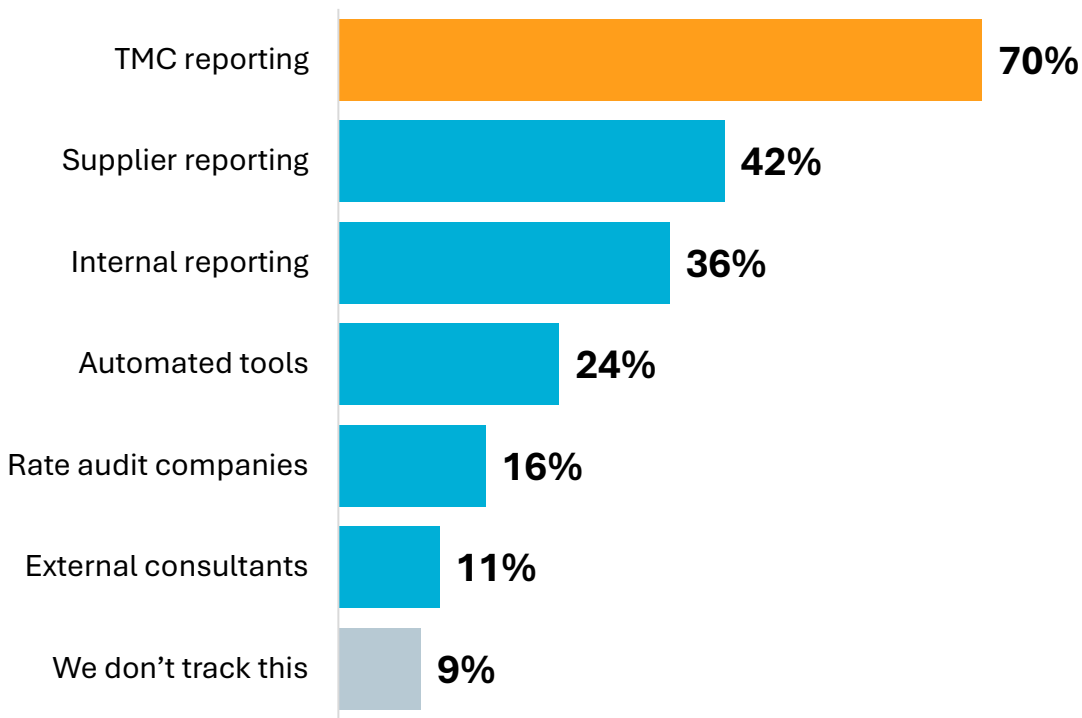
The most frequently cited criteria for supplier evaluation is actual cost savings, according to nearly 70% of respondents.



Q: How do you evaluate the performance of your travel suppliers? Select all that apply.

Tracking contract fulfillment

TMC reporting is the primary data source travel buyers rely on to monitor supplier compliance.

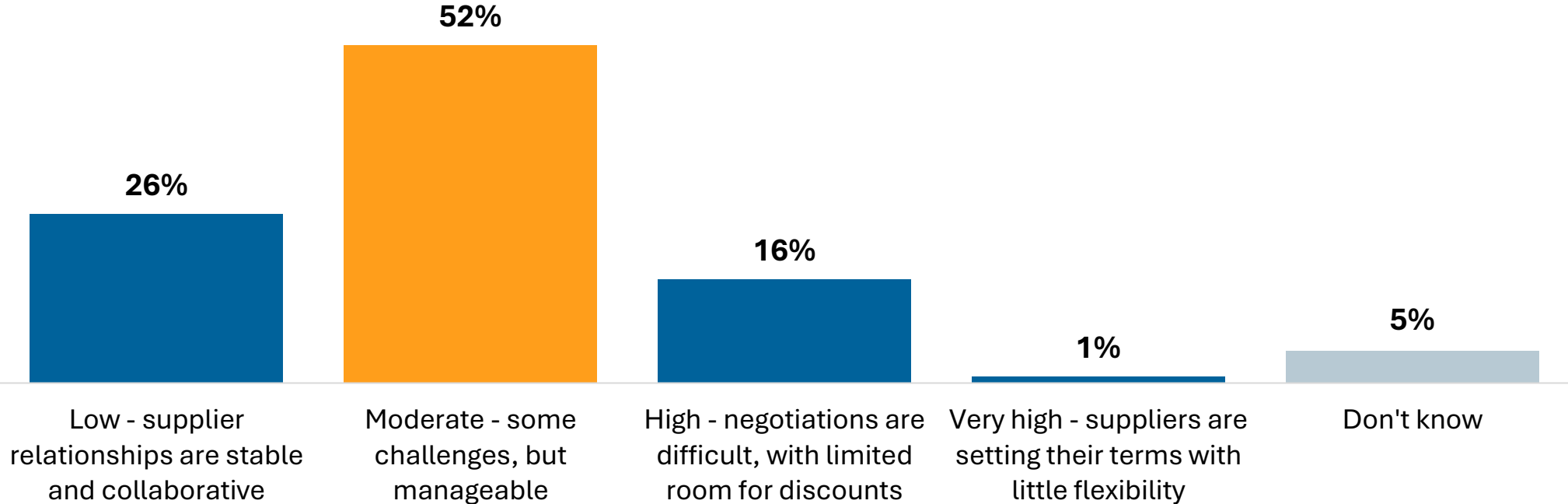


Q: How do you track supplier compliance with negotiated rates and contract terms? Select all that apply.



Pressure from suppliers

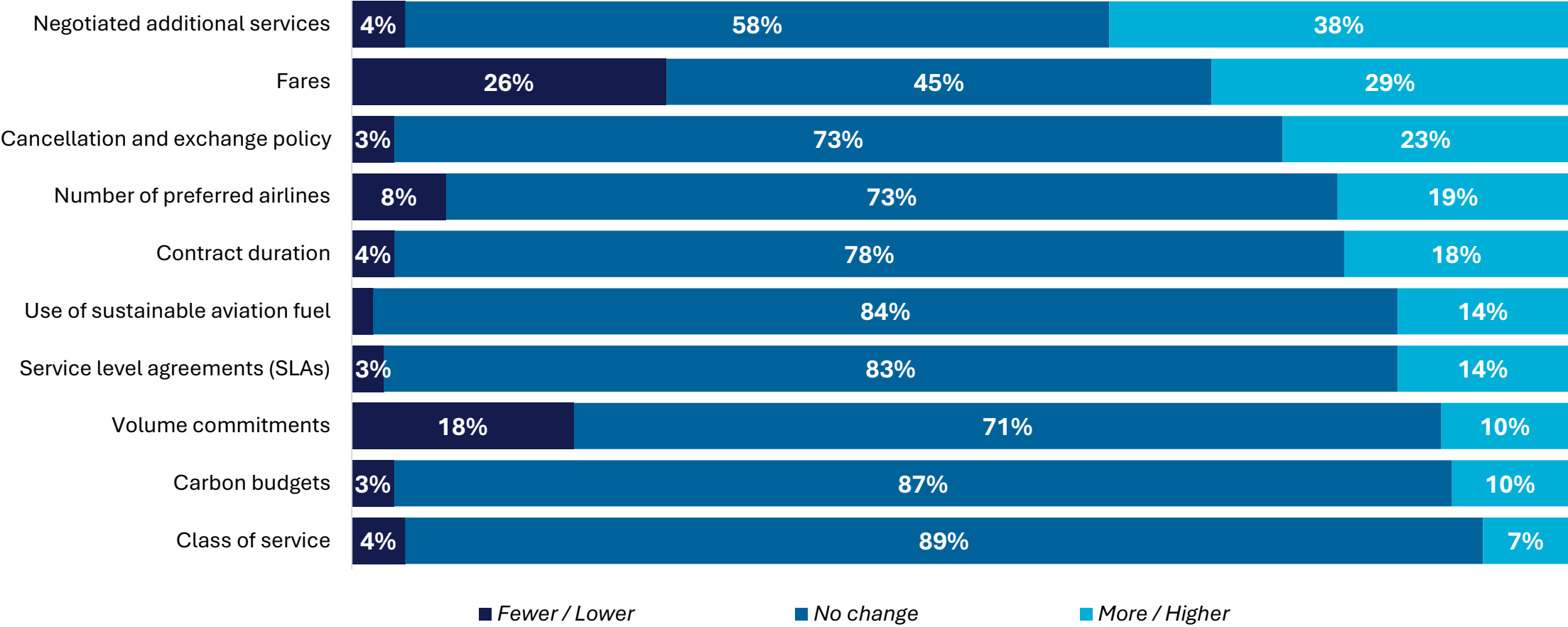
While over half of buyers experience moderate pressure from travel suppliers facing manageable challenges, a quarter find supplier relationships to be stable and collaborative.



Q: How would you describe the current level of pressure your organization is experiencing from travel suppliers?

Air sourcing strategy

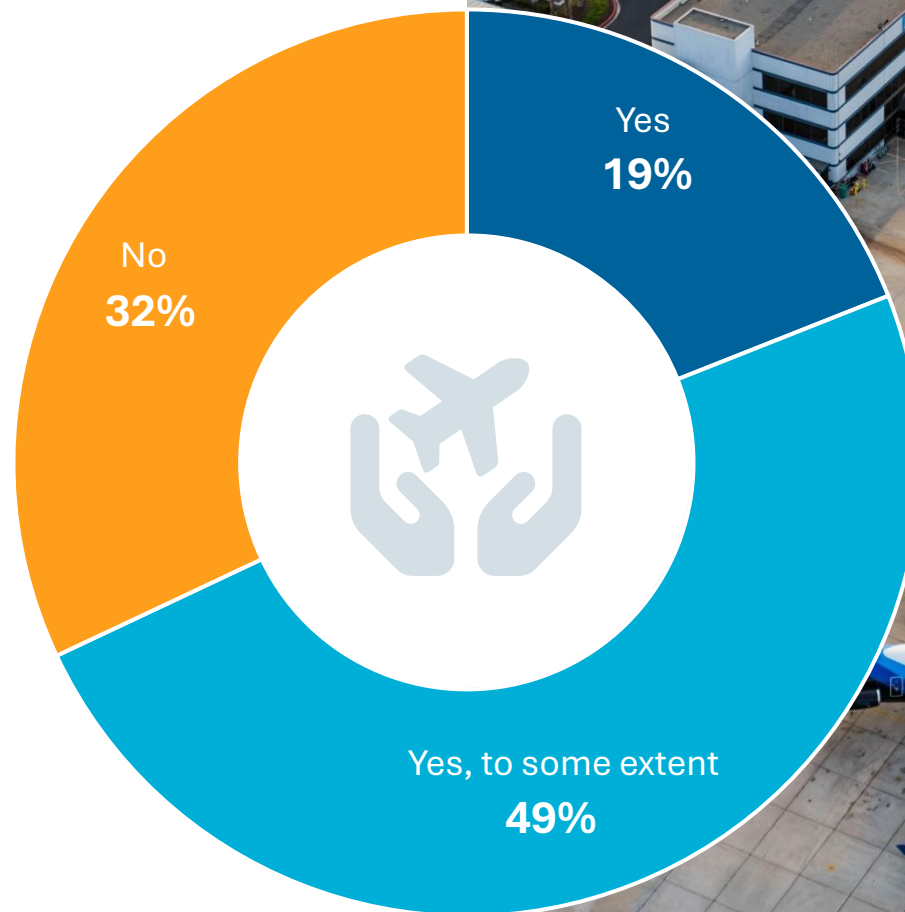
In upcoming negotiations with air suppliers, 38% of buyers expect to seek more additional services and 23% anticipate greater flexibility in cancellations and exchanges. Their expectations around air fares are mixed.



Q: How do you expect your air sourcing strategy to change in the next round of supplier negotiations? Select what applies.

The impact of airline alliances and joint ventures

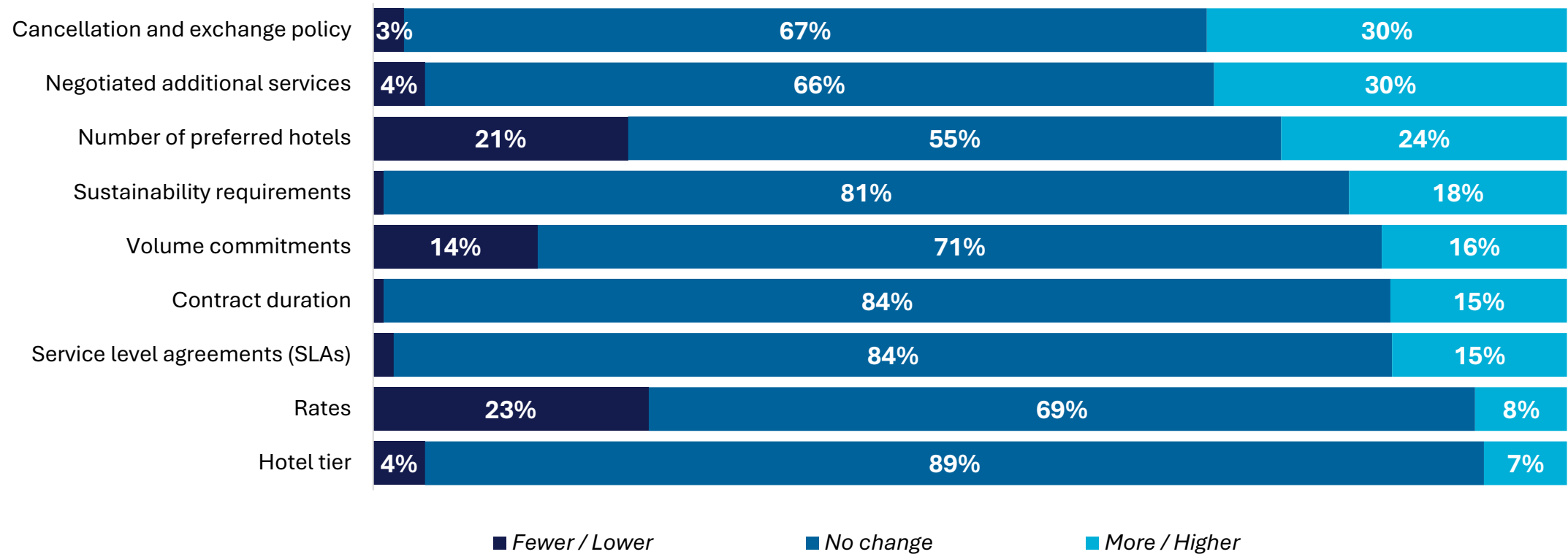
Two-thirds of travel buyers admit that airline alliances and joint ventures affect their air sourcing decisions, at least to some extent.



Q: Do airline alliances or joint ventures influence your air sourcing decisions?

Hotel sourcing strategy

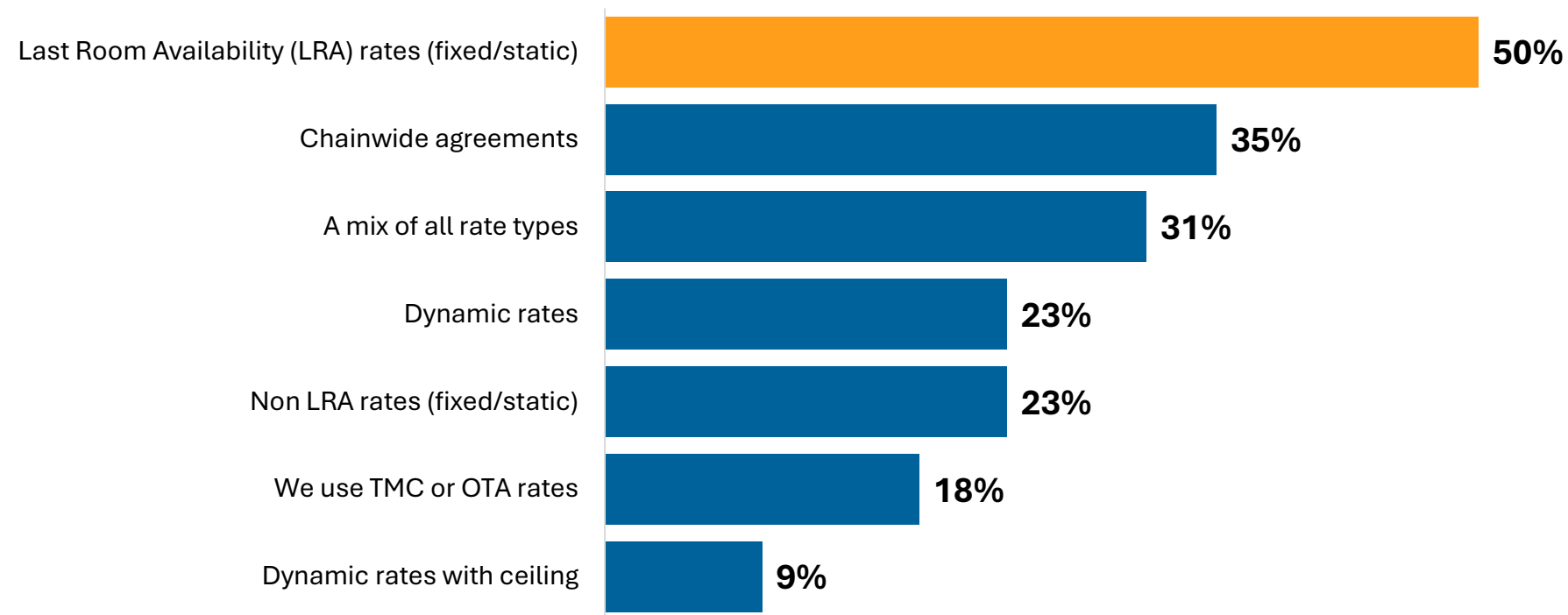
Travel buyers anticipate more flexible hotel cancellation policies, more additional services and increased sustainability requirements issued to accommodation providers. More buyers expect hotel rates to decline, the agreements to last longer and more service level agreements (SLAs) to be agreed on.



Q: How do you expect your hotel sourcing strategy to change in the next round of supplier negotiations? Select what applies.

Negotiated hotel rates

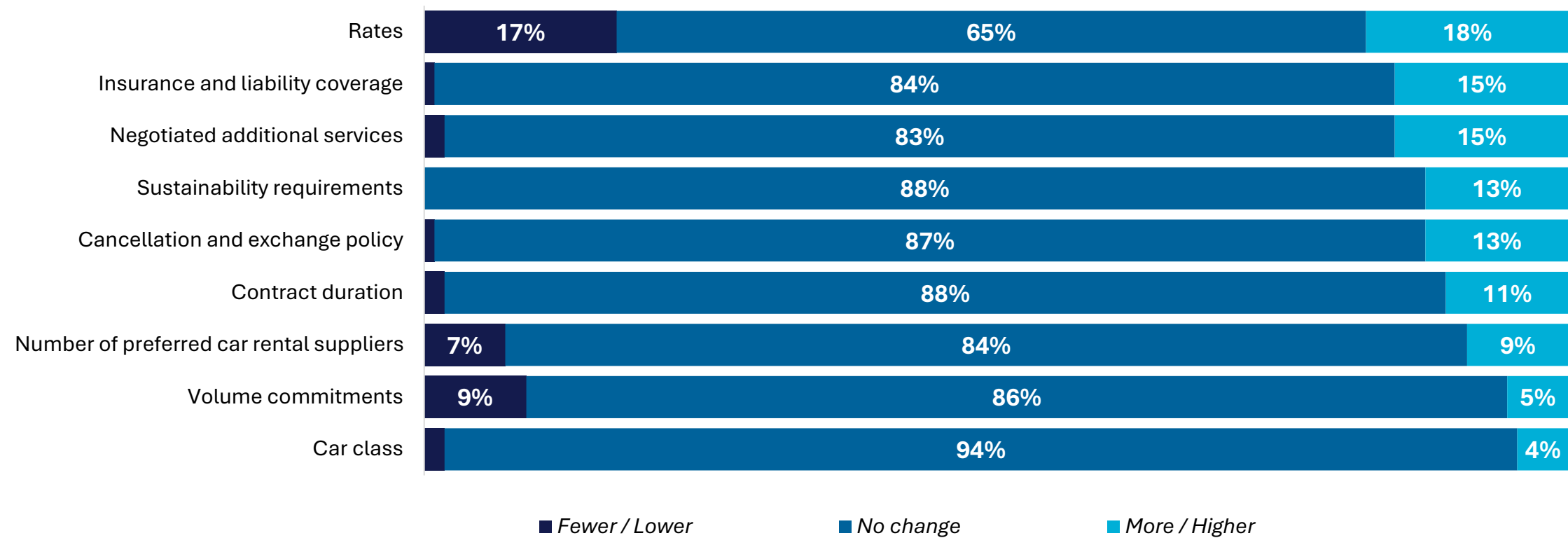
Half of buyers negotiate fixed Last Room Availability (LRA) rates, while approximately one-third secure hotel chainwide agreements. A similar proportion opt for a mix of different rate types.



Q: What hotel rates do you currently negotiate with suppliers?

Car rental sourcing strategy

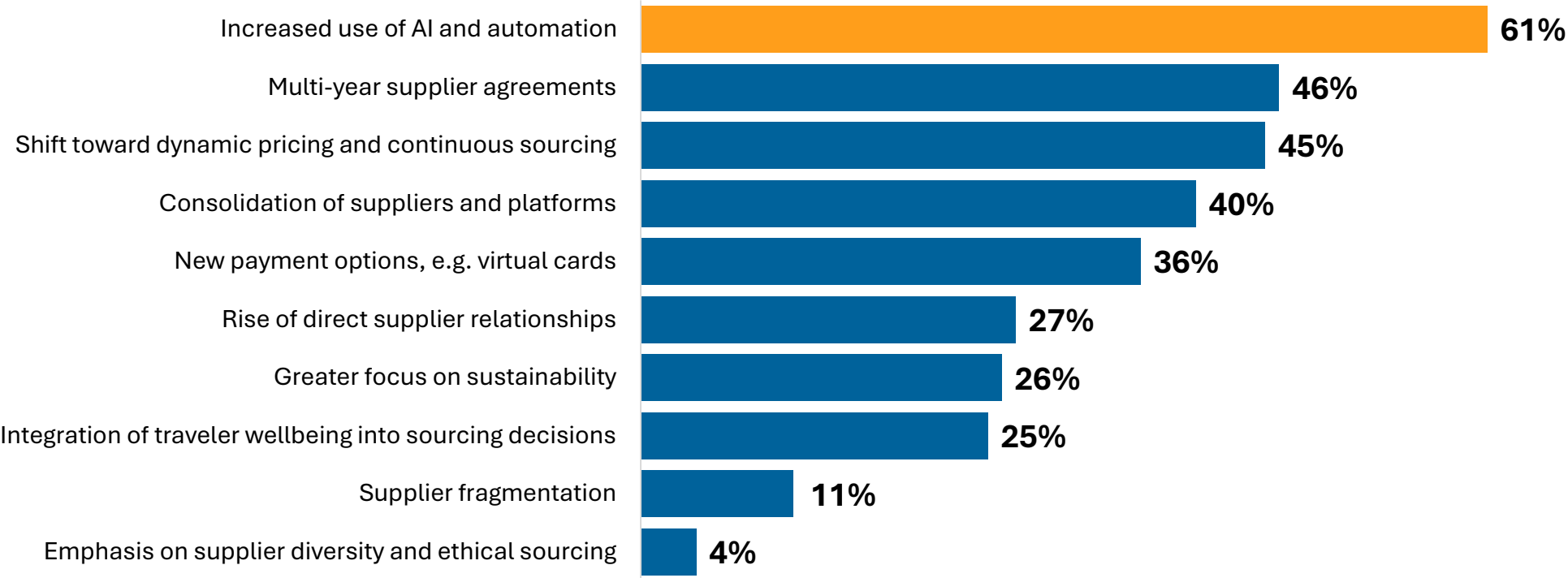
In the next round of car rental contract updates, buyers expect to seek wider insurance coverage and extra services. Some anticipate higher flexibility of cancellation policies and greater focus on sustainability.



Q: How do you expect your car rental sourcing strategy to change in the next round of supplier negotiations? Select what applies.

Sourcing trends

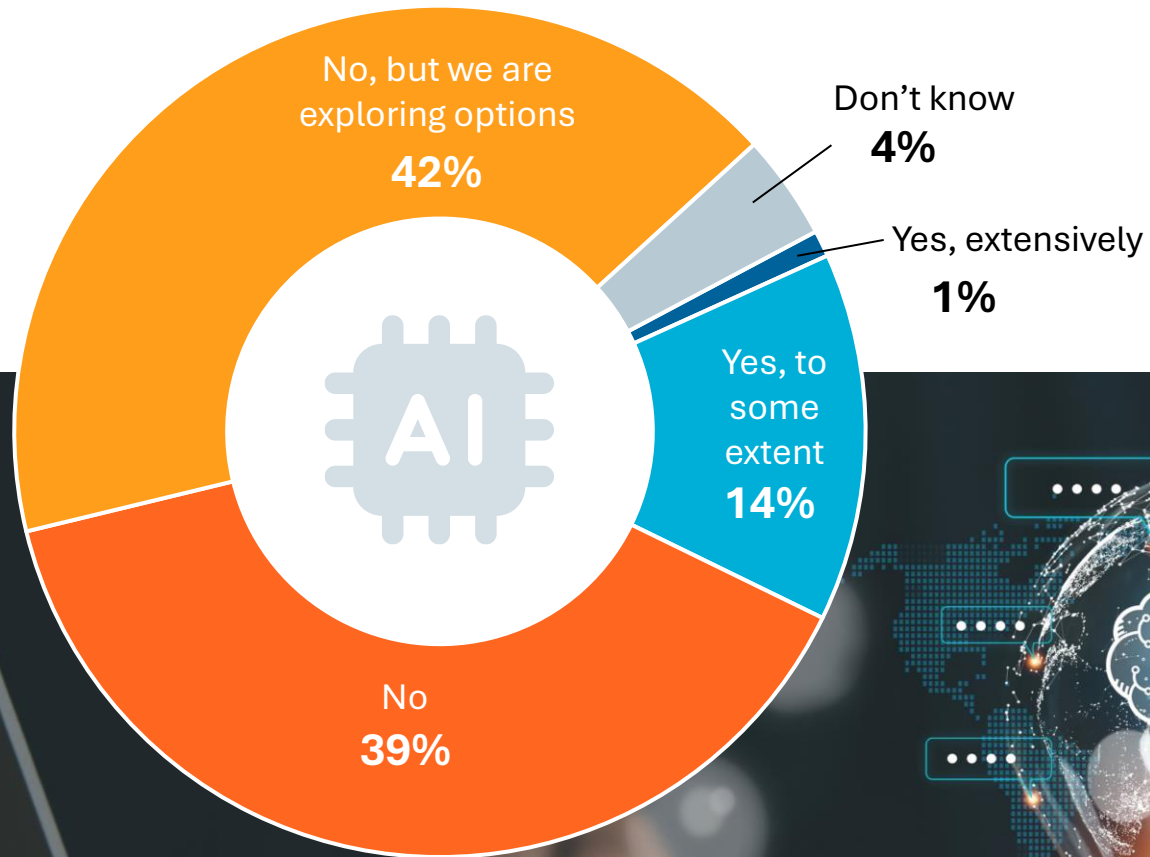
Artificial intelligence (AI) is emerging as the leading trend shaping the future of travel sourcing. Other notable trends include multi-year supplier agreements and dynamic pricing, while areas like supplier diversity and ethical sourcing remain less popular.



Q: What trends do you see shaping the future of travel sourcing? Select all that apply.

Use of Artificial Intelligence for sourcing

Nearly one in six travel buyers are leveraging AI for sourcing. Among the remaining 80% who haven't yet adopted AI, about half are actively exploring its potential and planning future implementations.



Q: Do you use artificial intelligence (AI) for travel sourcing or supplier management?

Examples of AI application:

- Market research
- Managing RFP process and evaluating supplier proposals
- Contract drafting and updates
- Reporting and supplier performance evaluation
- Re-shopping
- Expense auditing

Q: Please describe how you use AI for travel sourcing and supplier management.

What travel buyers want from suppliers



Q: What have you been telling travel suppliers about your needs that you feel hasn't been heard or addressed?

How BCD can help

BCD simplifies supplier data throughout the trip lifecycle, empowering travel managers with actionable insights for smarter budgeting, stronger compliance, and confident decisions.



Contract Optimization

- Prepare for supplier negotiations with data-backed insights
- Model potential savings from shifting volume or consolidating vendors
- Track compliance and usage against agreed terms



Spend Insights

- Visualize and consolidate supplier spend
- Identify top suppliers by volume and cost
- Spot trends and opportunities
- Highlight leakage and out of policy bookings by vendor



Real-Time Data

- Identify traveler behavior that could be corrected pre-trip
- Find opportunities to shift bookings to preferred vendors

How BCD can help

ADVITO

[Advito](#) is BCD's consulting division with solutions designed to help you build and optimize your managed hotel program. Our solutions are powered by data and driven by people with the expertise to take your program to new levels of savings, sustainability, and satisfaction.



Leverage the data at your fingertips to build a strategy designed to increase your negotiation leverage and guarantee you're getting the best deals.



Advito's team of sourcing experts will help you build a best-in-class hotel program, leading the entire process from building a solicitation list to final negotiations and beyond - saving you valuable time and resources.



Our always-on Dynamic Performance Management approach will help you stay ahead of changing market conditions. Don't set it and forget it; monitor and optimize your hotel program throughout the year, making decisions based on data-driven insights.



Advito's on-demand data visualizations, including market-rate and rate availability audits, day-of-week analysis, room type patterns, advance purchase patterns, amenities spend and more, will help you drive savings beyond well beyond sourcing.



Our industry-leading traveler engagement team can steer traveler booking behavior via omnichannel marketing campaigns designed to educate and influence your travelers.



Build a sustainable hotel program by sourcing preferred suppliers that align with your sustainability goals and nudging travelers to book more sustainable properties when they're on the road - reducing hotel-related carbon emissions.

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About BCD Travel

BCD Travel helps companies travel smart and achieve more. We drive program adoption, cost savings and talent retention through digital experiences that simplify business travel. Our 15,000+ dedicated team members service clients in 170+ countries as we shape a sustainable future for business travel. BCD's leading meetings and events management and global consultancy services complete our comprehensive suite of solutions for all aspects of corporate travel. In 2024, BCD achieved US\$22.9 billion in sales. For more information, visit www.bcdtravel.com.

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