



# Office Hours

## *Supplier Perspectives on Corporate Travel Recovery*

June 10, 2020



# Traxo: The control center for corporate travel managers.

Mission to organize & unlock all corporate travel data to empower travel managers

Turn every corporate travel program into a strategic asset



# Housekeeping

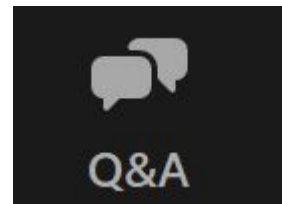
## Recording

Webinar will be recorded and available afterwards.

Check [blog.traxo.com](http://blog.traxo.com) in the next few days.

## Questions

- Please ask questions using Q&A button at the bottom of your screen in the webinar
- On topic questions much more likely to get answered by the panelists.



# Welcome!



**Bryan Watts**

Uber for Business Canada



**Aileen Furlong**

United Airlines



**Scott Gillespie**

Industry Observer



**Derek DeCross**

IHG

# Agenda

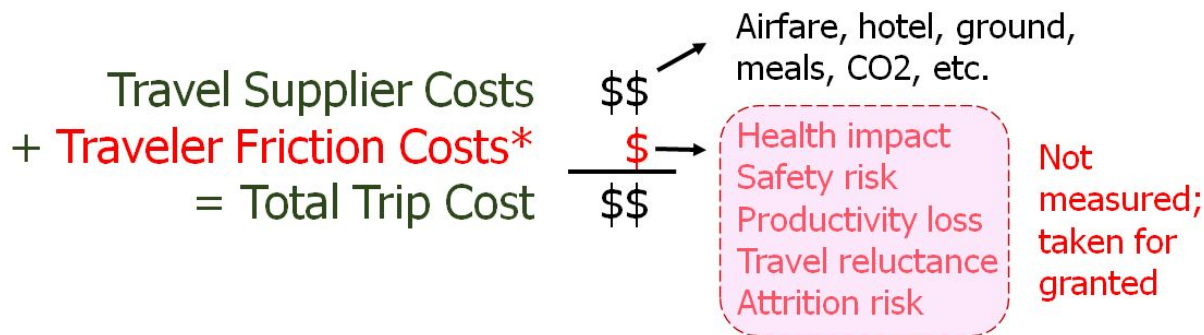
- **Scott Gillespie: The State of Corporate Travel**
- **Aileen Furlong - United Airlines**
- **Bryan Watts - Uber for Business**
- **Derek DeCross - IHG**
- **Closing Thoughts**
- **Q&A**



# The State of Corporate Travel:

## Travel Friction and the Recovery of Business Travel

A trip's total cost has **two** key parts. Only one is measured.



Why? Because **traveler friction** costs have been low and hard to measure

\*Learn more about traveler friction at <https://gillespie411.wordpress.com/traveler-friction/>

# Travel Friction: Hidden Costs

Now, Covid anxiety has **greatly increased the traveler friction costs**



# Travel Friction: Post-Pandemic Analysis

We must now focus **entirely** on reducing traveler friction costs

Key: ● Direct Influencer

Traveler Friction Costs	Sr. Mgmt. & Budget Owners	Corp. Travel Managers	HR & Procurement	Airlines, Hotels, Ground	TMCs & Data Providers	Airports & Meeting Facilities
Health	●	●	●	●	●	●
Safety	●	●	●	●	●	●
Productivity	●	●	●	●	●	●
Reluctance	●	●	●	●	●	●
Attrition	●	●	●			

Source: Scott Gillespie, Gillespie's Guide to Travel Innovation

June 2020



# Traveler Friction: A New Paradigm for Corporate Travel

The business travel industry's **paradigm must shift**

From	To
Reducing supplier prices	Rewarding supplier quality
Ticking the Duty of Care box	Enshrining traveler well-being
Minimizing travel budgets	Maximizing traveler success
Enforcing cost-focused travel policies	Emphasizing traveler productivity
Desiring control and compliance	Delivering flexibility and support
Measuring savings and discounts	Predicting traveler health, safety and success

Source: Scott Gillespie, Gillespie's Guide to Travel Innovation

June 2020

# Macro Trends: Where Are We?

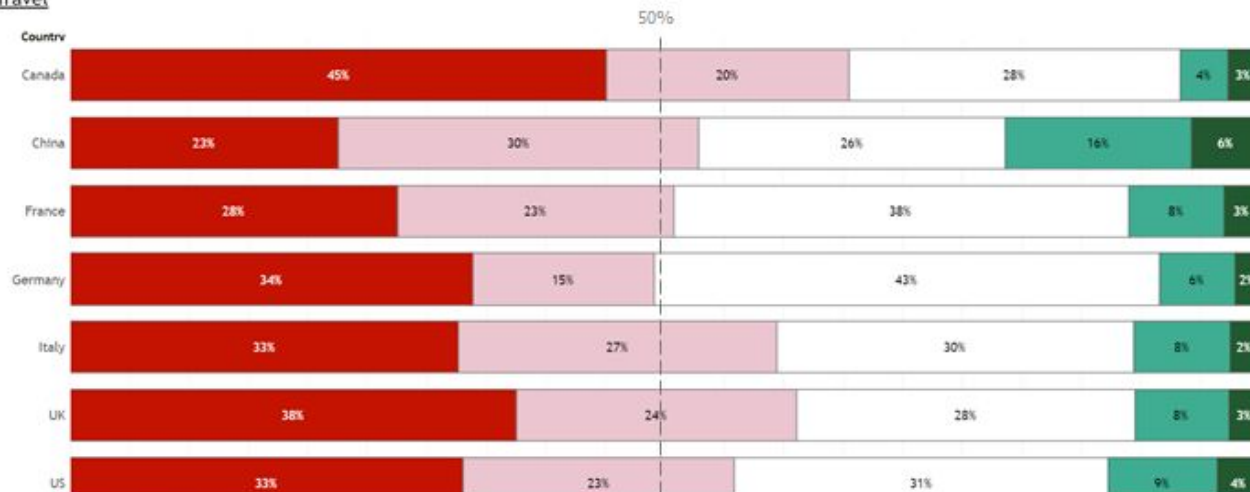
## Consumer Sentiment

Dominant sentiment is to spend less on travel

Consumer Sentiment: How do you expect your spend to change in the next 6 months across the following areas?

Category: Travel Country: [All] 1. A lot less than usual 2. Somewhat less than usual 3. About the same as usual 4. Somewhat more than usual 5. A lot more than usual

### Travel



Source: BCG's Travel Recovery Insights Portal at <https://on.bcg.com/TravelRecovery> in collaboration with ARC and 3Victors

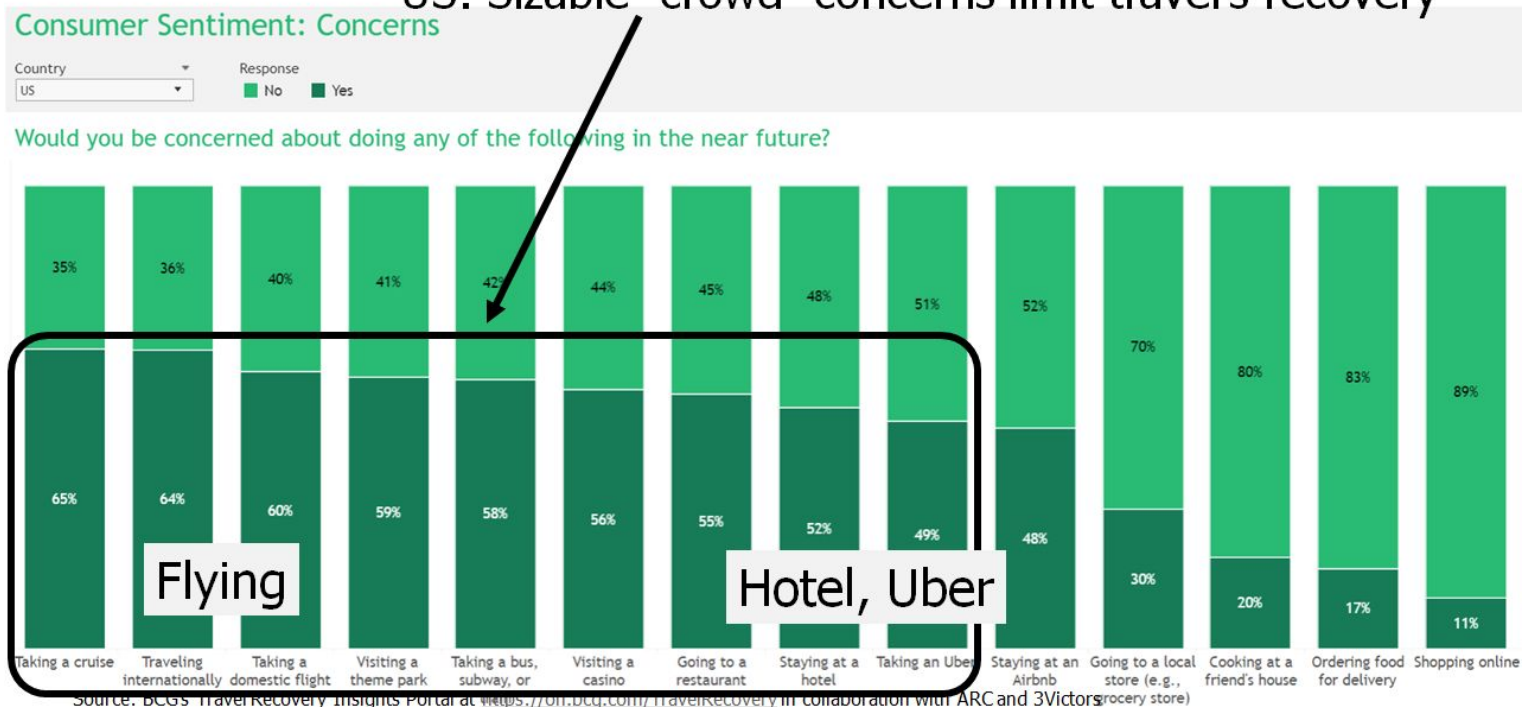
Consumer data from Wave 10 May 8-11

From TRIP's Tableau workbook published on June 4, 2020

2

# Macro Trends: Traveler Concerns

US: Sizable "crowd" concerns limit travel's recovery



# Influence on Traveler Confidence

Prompts to Fly?

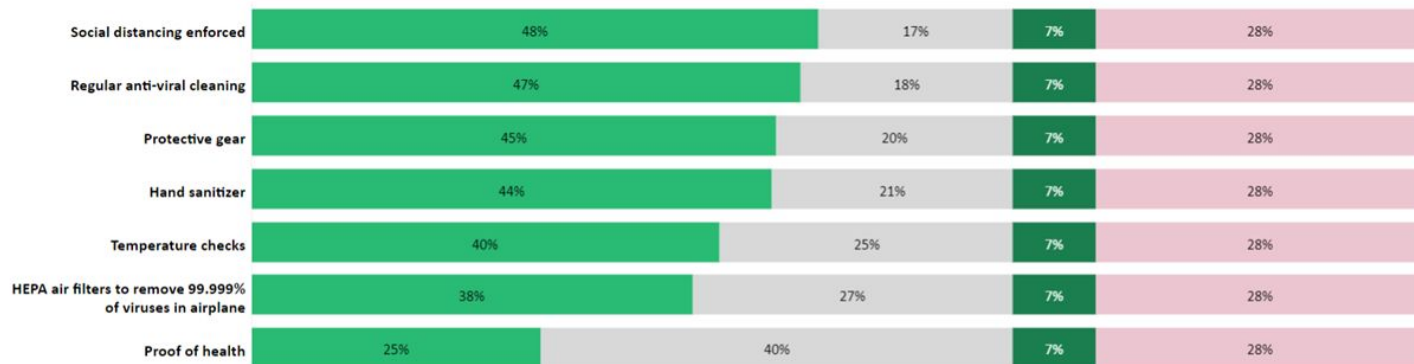
US: Stronger hygiene efforts; 28% said "Nothing would convince me to fly in the next month"

Consumer Sentiment: Which measures would make you fly again in the next month?

Country  
US

☐ N/A - Nothing would convince me to fly in the next month  
☐ N/A - I'd be willing to fly in the next month without these measures  
☐ Other measures  
☐ This measure

Data Shown for Last Survey Wave in US: Wave 10 (May 8-11)



Source: BCG's Travel Recovery Insights Portal at <https://on.bcg.com/TravelRecovery> in collaboration with ARC and 3Victors

Analysis by Scott Gillespie using country-specific data from the TRIP tool.

Consumer data from Wave 10 May 8-11

From TRIP's Tableau workbook published on June 4, 2020

4





UNITED  
FOR BUSINESS



# Traxo Office Hours

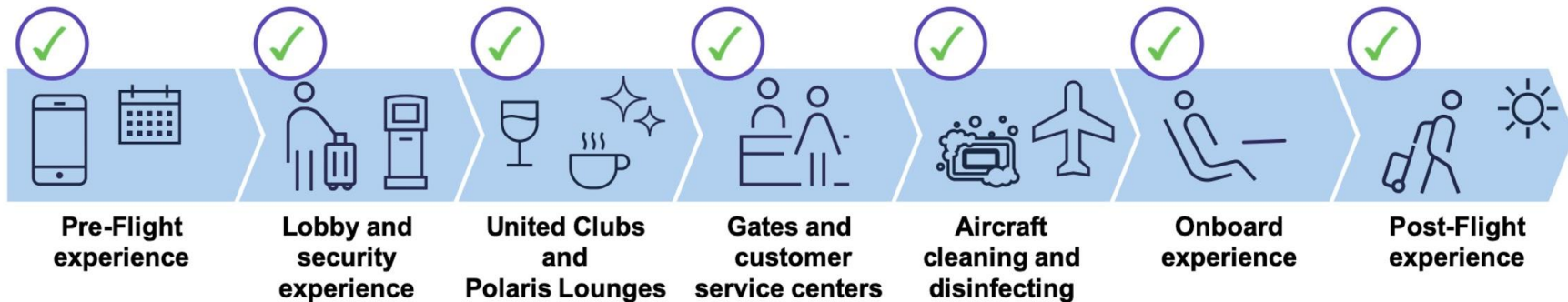
## *Corporate Travel Recovery*



# The coronavirus pandemic has brought cleanliness and hygiene standards to the forefront of customers' minds



Developed in conjunction with





# Enhancing cleaning and sanitization while promoting social distancing

**Installing protective barriers in lobbies and gate areas**



**Creating a "touchless" experience**



**Changing how we board and deplane**



**Providing hand sanitizing wipes and all-in-one kits**



**Requiring face masks for employees and customers**



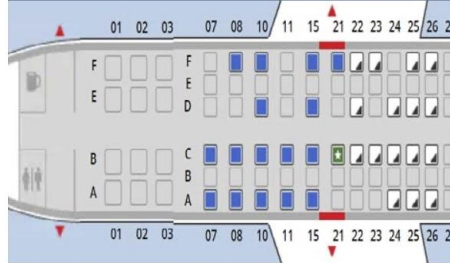
**Electrostatic spraying**



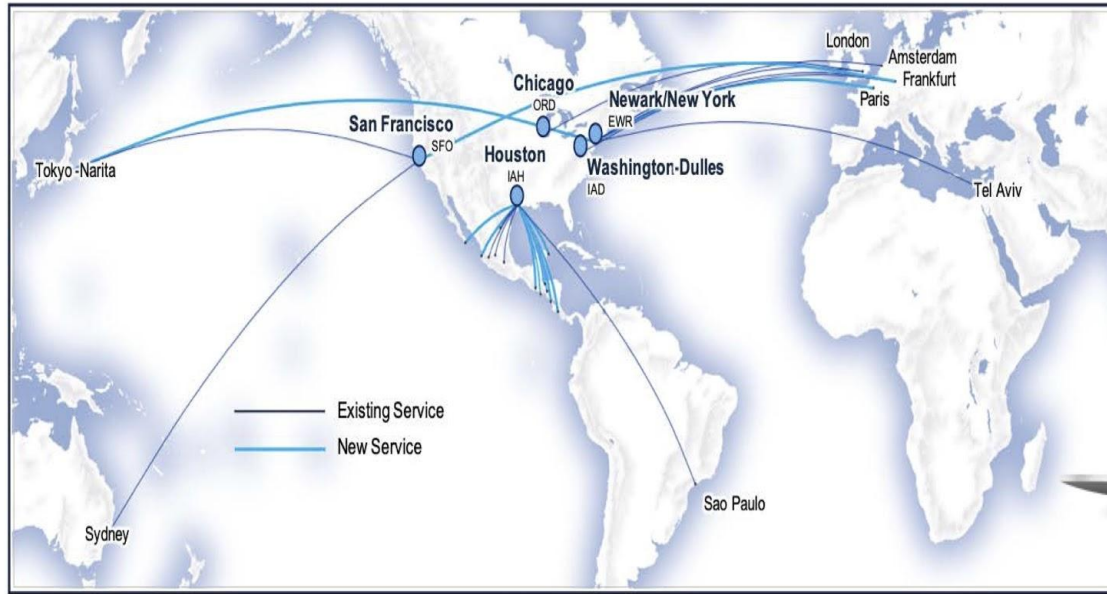
**Using HEPA filters**



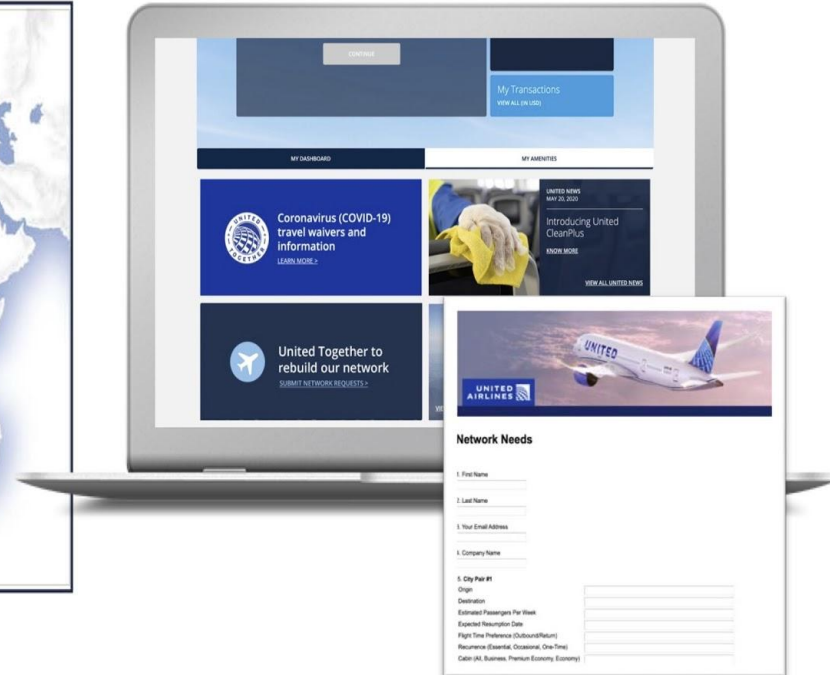
**Empowering customers to choose less crowded flights**



# Rebuilding our network and developing tools to collect real time insights into our customer network needs



United International Network- June 2020







**Bryan Watts**  
Uber for Business Canada

The world has changed with COVID-19.

# Back to Work. The Safe Way

From small businesses to large corporations, no organization has been immune to this pandemic.

Organizations are doing everything they can to keep their business moving, their employees engaged and customers served.

As restrictions are being lifted, businesses are looking for **strategic partners** to help them determine: How to bring back employees the safe way? How to keep them safely fed and motivated in times of economic uncertainty?

Businesses are looking for partners to:

**Help reimagine the future of work.**

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Reimagining Door to Door Safety.

# Safety and education for all

**Masks required** for both riders and drivers

Uber has **distributed millions of PPE units** to drivers globally, including masks, wipes, sanitizers

Drivers must **confirm they're wearing a mask** through a selfie and that they've sanitized their vehicle before going online

Rating system gives Riders and Drivers a chance to **provide feedback**



## How to wear a face cover or mask

As part of our ongoing efforts to help support drivers and delivery people during the COVID-19 pandemic, we're sharing a video with tips sourced from public health organizations to help you learn how to properly wear a face cover or mask.

Thank you for helping to keep yourself and your community safe.

Watch now

# Uber Eats

**Contactless Delivery** now available for all orders

Offices doing away with group lunches and opting for **individually packaged meals**

**Reduce exposure** to employees by keeping them in-office instead of going out to restaurants



# Flexibility

**60%**

of workers feel very uncomfortable having to return to work.<sup>1</sup>

**77%**

of workers state they will be avoiding taking public transit for daily commute.<sup>1</sup>

**77%**

of commuters consider Ridershare as a safer alternative to public transit.<sup>2</sup>

## Our Solution

**A commute program that will help your employees get to and from work with safety, ease and comfort.**

1. Qualtrics [Survey](#) and Report "Return to Work and Back to Business"

2. Uber's research and insights commuter survey (n=147)





Reimagining Daily Commute.

# Commute that is comfortable

## **A commute that gives you time back**

With Uber, employees can sit back, relax and/or catch up with work. By not having to sit behind the wheel or be dependent of public transit schedules, your employees will gain valuable time back.

Let your team members commute when it's convenient for them, because inspiration and productivity don't follow bus and train schedules



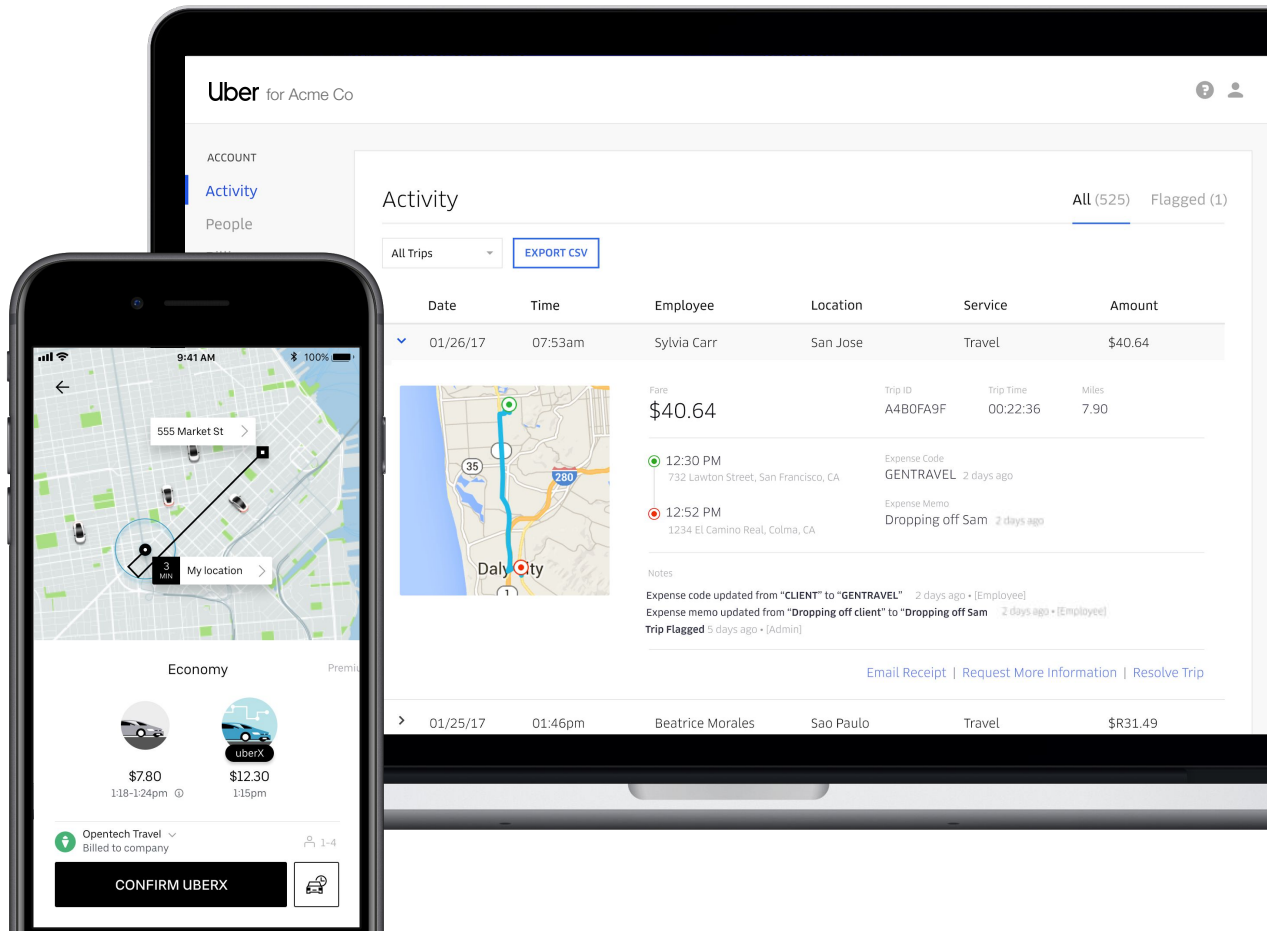
# Visibility

**Dashboard activity** visible to admins for all 'business trips'

**Custom programs and controls** including spend caps, location and time/day restrictions

**Improved travel program compliance**

**Ensure return on investment**



Reimagining Door to Door Safety.

# Safety tools on every trip

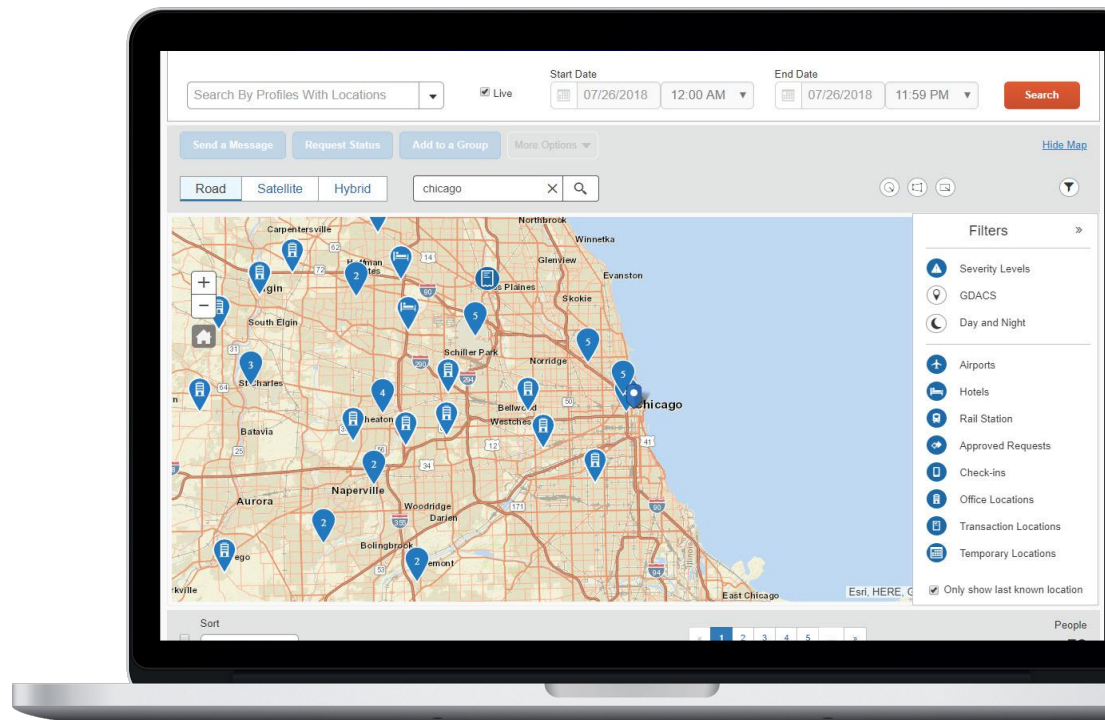
## Highest Duty of Care

### Concur® Locate integration

### ISOS TravelTracker

We've integrated with the powerful employee risk management and safety communication solutions. Quickly locate, communicate with, and make sure your employees are safe, no matter where they are.<sup>1</sup>

Protect employees by staying aware of events and travel itineraries. Whether it's a simple change of plans or an emergency, Concur Locate enables you to fulfill your duty of care.





# Lodging Perspective



- **IHG Way of Clean: giving guests greater confidence and hotel teams the protection needed**
- **What to Expect: a closer look at the Guest Journey**
- **How these new standards impact the Groups & Meeting space, and**
- **Modifications to the 2021 Corporate Travel RFP Season**



# Journey-Based Travel Management: A New Era



Source: U.S. Travel Association, [ustravel.org/industryguidance](https://ustravel.org/industryguidance)

## Resources:

- Travel Industry: [https://www.ustravel.org/sites/default/files/media\\_root/document/HealthandSafetyGuidance.pdf](https://www.ustravel.org/sites/default/files/media_root/document/HealthandSafetyGuidance.pdf)
- Air Travel: <https://www.iata.org/en/youandiata/travelers/health/>
- Lodging: <https://www.ahla.com/covid-19-resource-center>
- ACTE: <https://acteconnect.acte.org/home>

# Corporate Travel: The Four Stages of Post-Pandemic Recovery

Download the ebook.

<https://info.traxo.com/four-stages>



# Q&A



# Thank you!

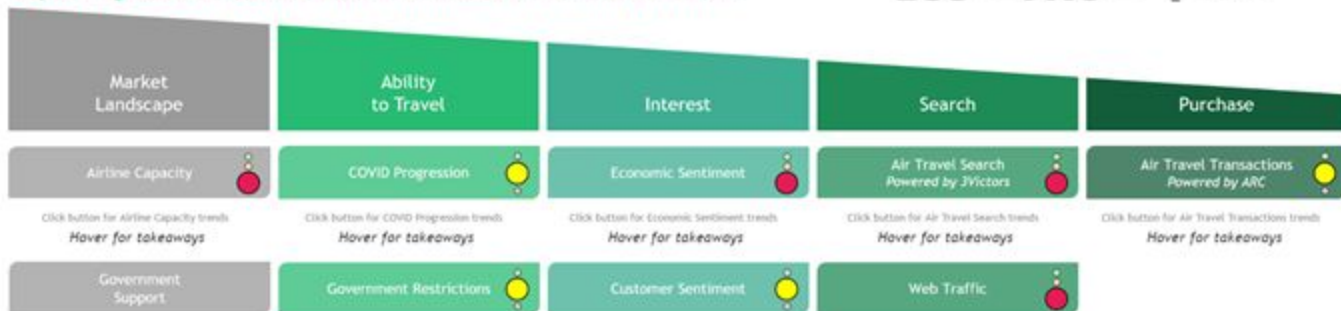
Visit [blog.traxo.com](https://blog.traxo.com). Next Office Hours coming soon.

# APPENDIX

# Travel Recovery Insights

Capturing Data Across the New Purchase Funnel for Air Travel

BCG × ARC × 3VICTORS



as of June 4, 2020

Source: BCG's Travel Recovery Insights Portal

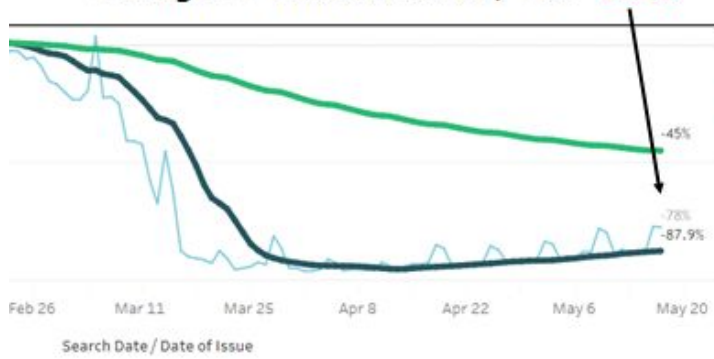
In collaboration with ARC and 3Victors

Curated by Scott Gillespie, Gillespie's Guide to Travel Innovation

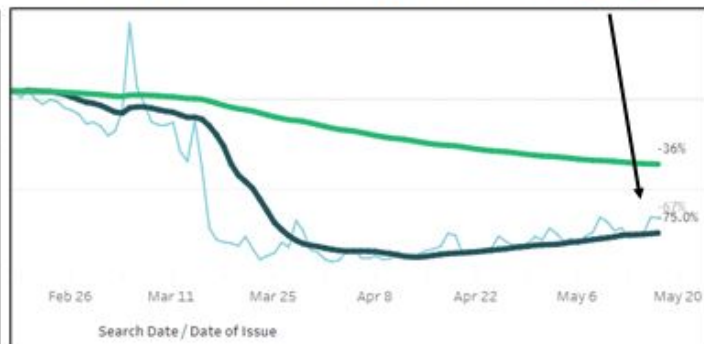
Purchases

Analysis of US Domestic round trip tickets: Nights are trending upward faster than tickets

Change in Tickets Issued, YoY -88%



Change in Ticketed Nights, YoY -75%



Source: BCG's Travel Recovery Insights Portal at <https://on.bcg.com/TravelRecovery> in collaboration with ARC and 3Victors

From TRIP's Tableau workbook published on June 4, 2020

5