The Remaking of Business Travel
Sustainable Travel is More Aspiration than Action

As business travel resumes post-pandemic, are companies taking the opportunity to revisit the environmental and social impact of their travel programs? Our survey of travel managers suggests few are making it a priority.

Organizations aspire to sustainable business travel

Almost half of surveyed companies expect more focus on the social and environmental impact of business travel post-pandemic.

How will business travel most likely change post-pandemic?

- Tighter travel restrictions by role: 65%
- More cost-conscious: 64%
- More focus on the social and environmental impact of travel: 48%
- More focus on a positive traveler experience: 48%
- Tighter travel restrictions by role seniority: 38%
- Shorter trips: 31%
- More combined business/leisure trips: 20%
- More employees travelling due to a distributed work force: 14%
- Longer-multi leg trips: 12%
- Preference for rental accommodations vs. hotels/motels: 6%

But are they really taking action?

What are companies doing to make their travel programs more socially and environmentally conscious?
Only 25% put social or environmental impact in their top 3 priorities.

Most important issues for corporate travel program (% selecting issue among top 3)

- Duty of care: 99%
- Cost control: 85%
- Employee satisfaction: 75%
- Sustainability/carbon footprint: 25%
- Social equity (supporting minority businesses): 13%
- Other: 3%

Only a third have a sustainability program that includes business travel. Even fewer have a program to increase spending with minority-owned businesses while traveling.

Do companies have a business travel sustainability program?

- 35%
- 13%
- 24%
- 28%

Do companies have a business travel buyer diversity program?

- 30%
- 19%
- 17%
- 33%

- Our company doesn't have a formal program to increase spend with minority-owned businesses
- Our company has a formal program to increase spend with minority-owned businesses, but it doesn't include business travel
- Our company has a formal program to increase spend with minority-owned businesses including during business travel
- Our company has a formal sustainability program but it does not include business travel
- Our company has a formal sustainability program that includes business travel
- Don't know
The actual measures taken are limited. By far the most common practice is to measure the carbon footprint of all travel (58%). Less than a quarter of companies are implementing other measures.

Companies with large programs are doing better. They are more likely to have a sustainable travel policy and to mandate sustainable suppliers. Those with mid-size programs are more likely to use data to drive greener decisions.

Are travel programs taking sustainability measures? by annual travel spend (pre-pandemic)

- Measuring the carbon footprint of all travel
  - Less than 10 million: 39%
  - 10 million to 30 million: 74%
  - 30+ million: 54%
  - Overall: 58%

- Requiring employees to travel less
  - Less than 10 million: 32%
  - 10 million to 30 million: 26%
  - 30+ million: 22%
  - Overall: 25%

- Leveraging carbon footprint/sustainability data when selecting preferred suppliers
  - Less than 10 million: 5%
  - 10 million to 30 million: 39%
  - 30+ million: 26%
  - Overall: 22%

- Encouraging or requiring use of public transport or low-emission vehicles
  - Less than 10 million: 18%
  - 10 million to 30 million: 18%
  - 30+ million: 21%
  - Overall: 19%

- Leveraging carbon footprint/sustainability data in the travel booking process
  - Less than 10 million: 13%
  - 10 million to 30 million: 29%
  - 30+ million: 15%
  - Overall: 19%

- Recommending or mandating accommodation options that meet sustainability goals
  - Less than 10 million: 13%
  - 10 million to 30 million: 16%
  - 30+ million: 28%
  - Overall: 19%

- Recommending or mandating airlines that meet sustainability goals
  - Less than 10 million: 21%
  - 10 million to 30 million: 16%
  - 30+ million: 22%
  - Overall: 19%

- Setting sustainability targets for company events
  - Less than 10 million: 13%
  - 10 million to 30 million: 13%
  - 30+ million: 24%
  - Overall: 17%

- Purchasing carbon offsets
  - Less than 10 million: 16%
  - 10 million to 30 million: 18%
  - 30+ million: 20%
  - Overall: 17%

- Incentivizing employees to choose sustainable options when they travel
  - Less than 10 million: 11%
  - 10 million to 30 million: 8%
  - 30+ million: 4%
  - Overall: 7%
Choosing suppliers

Sustainability and minority ownership are a low priority when choosing travel products and partners.

How important are various factors when choosing travel products/partners?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Very unimportant</th>
<th>Unimportant</th>
<th>Somewhat important</th>
<th>Important</th>
<th>Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most convenient/efficient</td>
<td>4%</td>
<td>11%</td>
<td>40%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Best employee experience</td>
<td>3%</td>
<td>15%</td>
<td>41%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Lowest cost</td>
<td>2%</td>
<td>18%</td>
<td>51%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Most sustainable</td>
<td>4%</td>
<td>13%</td>
<td>43%</td>
<td>31%</td>
<td>9%</td>
</tr>
<tr>
<td>Most socially equitable (e.g. minority-owned businesses)</td>
<td>4%</td>
<td>15%</td>
<td>42%</td>
<td>32%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Companies are only willing to pay the same or less for sustainable vendors.

How much more would companies be willing to pay for travel/meals provided by sustainable vendors?

- No more
- I expect sustainable options to be less expensive
- I expect sustainable options to be the same price as other vendors
- 10% more
- 25% more
- 50% more
About The Remaking of Business Travel

The Remaking of Business Travel is an Emburse research survey conducted in collaboration with the Global Business Travel Association. The GBTA team surveyed 220 travel managers in the US and Canada between April 22-28, 2021. One third of the companies surveyed had travel budgets of less than $10M; one third had less than $30M, and one third had a budget of +$30M. Companies ranged in industry, including Professional Services, Healthcare, Finance and more.

Emburse humanizes work by empowering business travelers, finance professionals, and CFOs to eliminate manual, time-consuming tasks so they can focus on what matters most.

Emburse offers a growing portfolio of award-winning expense and AP automation solutions, including Emburse Abacus, Emburse Captio, Emburse Certify, Emburse Chrome River, Emburse Cards, Emburse Nexonia, Emburse SpringAhead and Emburse Tallie. Its innovative offerings are tailored to meet the unique needs of specific industries, company sizes, and geographies, and are trusted by more than 9 million users in more than 120 countries. Over 16,000 customers, from start-ups to global enterprises, including Boot Barn, Grant Thornton, Telefónica, Lufthansa Systems, and Toyota rely on Emburse to eliminate manual processes, make faster, smarter decisions, and help make users’ lives - and their businesses - better.

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For more information on Emburse, visit emburse.com, call 877-EMBURSE, or follow the organization’s social channels at @emburse.

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