

OH BT! WHY THE OBTs NEED TO WAKE UP & SMELL THE COFFEE



BY
**FESTIVE
ROAD**



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In the coffee breaks of conferences and buyer-to-buyer discussions the FESTIVE ROAD team have heard, more than ever, the rumblings of discontent with the ability of the OBТ to service the existing and future needs of the travel manager and their travellers.

So, we set out, as we always do, to undertake a deep listening exercise across North America and Europe.

We surveyed and interviewed over one hundred (100) global travel buyers, representing the top tier leaders of global travel programmes, and we also interviewed a significant number of Online Booking Tool executives. And here's what we found.

WHAT THE BUYERS SAID

Dissatisfaction levels with OBTs is pretty high right now.

73%

of Travel Buyers surveyed were less satisfied with corporate tools than leisure tools

CUMBERSOME
EXPERIENCE
BIASED
SORT
OPTIONS
OLD
SLOW
STANDARD
UNDIFFERENTIATED
IRRELEVANT
ANTIQUEATED
BAD
CLUNKY
BORING
UNAPPEALING
LIMITED
USER

WHILST CONTENT IS AVAILABLE ACROSS MULTIPLE CHANNELS TRAVEL BUYERS JUST AREN'T SEEING ENOUGH OF IT

79%





of Travel Buyers surveyed said their tool consumes content from multiple channels

BUT WHEN ASKED IF THEIR CURRENT CORPORATE TOOL PROVIDES SUFFICIENT CONTENT ACROSS...



WHEN IT COMES TO CONTENT ATTRIBUTES..

Do you believe corporate booking tools give your travellers enough of the following when they are shopping?

| |  |  |  |  |
|--|---|---|---|---|
| Choice | 66% | 62% | 21% | 37% |
| Attribute details (i.e. product features) | 28% | 49% | 23% | 32% |
| Personalised offers | 13% | 16% | 12% | 12% |
| Recognition of their company's travel program status | 59% | 59% | 22% | 37% |
| Recognition of Traveller status | 31% | 28% | 13% | 18% |
| Ratings | 26% | 68% | 8% | 18% |
| Traveller feedback | 13% | 16% | 6% | 9% |
| Offers which are available online elsewhere | 10% | 20% | 7% | 9% |

FESTIVE ROAD
Comment: Content integrity is undermined, personalisation expectations are running high

THE INTERFACE ISN'T AT THE STANDARD THEY EXPECT

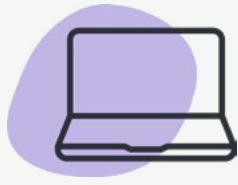
57%
of Travel Buyers surveyed disagreed with the statement below

“Corporate Booking Tools offer an enticing and intuitive interface to make shopping for travellers easy and enjoyable.”

FESTIVE ROAD
Comment: The crux of the matter - the shop window reflects badly

However, the basic principles of content, control and Customer Experience (CX) in an OBТ are sound and newcomers are providing impetus for change

WHILST OVERALL SATISFACTION LEVELS WITH OBTS ARE PRETTY LOW RIGHT NOW, WHAT ARE THE OBTS DOING WELL TODAY?



Enabling business travel to be booked in one place



Applying policy and negotiation rates



Newcomers bringing content and fresh interface

But confidence to provide for future needs isn't high

Q: Do you believe that corporate booking tools apply your company's requirements for control and authorisation in a way which suits your company needs...

56% NOW



44% IN THE FUTURE?

FESTIVE ROAD Comment: OBTS are doing the basics and some players starting to hear the call for more

FESTIVE ROAD Comment: If you think control & authorisation aspects cause issues now, the expectation is it will get worse

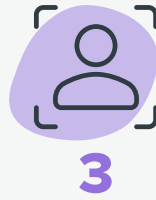
There's not enough engagement



Q: How would you assess corporate booking tools on a scale of 1-10 on their ability to...



Share their roadmap



Engage the corporate buyer community on identifying development needs



Add new features at the right pace

FESTIVE ROAD
Comment:
Assessment of engagement and the pace of developments are poor

And there's lots of room for improvement in sourcing, implementing etc.

When asked if they feel the current aspects of the marketplace work well, buyers shared...

| | AGREE |
|--|-------|
| The sourcing / RFP process? | 36% |
| Contracting? | 37% |
| Tool implementation? | 51% |
| The financial models (i.e.. how you remunerate the tech company)? | 22% |
| Independence from other value chain providers (TMC, GDS, other Supplier) | 18% |

FESTIVE ROAD
Comment:
Dissatisfaction runs far deeper than the UI and content

There's an appreciation of more flexibility to connect travel and expense components

"The tools do not need to be the same but the data must flow seamlessly."

68%

of Travel Buyers surveyed indicate it's important to integrate with expense

FESTIVE ROAD
Comment: Integration importance surprisingly low but data enhancements are fuelling flexibility

WHAT TRAVEL BUYERS SAID

“(OBTs) need to become more intuitive to the needs of each user and provide better visibility of the fares, conditions and product offering. **Customised offerings only found in the tool would help with TMC compliance and two-way communication** i.e. traveller ratings and potentially a chat feature would engage travellers and bookers more. Some of this does exist, but is not the norm and certainly not available in the tool we use today.”

“It is becoming more critical to have a direct relationship with the OBT provider.”

“The lack of speed and pro-activeness in adapting the OBTs to the ever-changing Business Travel Management is having a significant and negative impact on the Corporate Travel Program. As such, the **traditional OBTs are losing relevance in today’s ecosystem.**”

“We as travel buyers understand that of course the corporate OBT will be more complex than the one used for a specific airline and leisure. However, **making it simpler and allowing more content will drive higher adoption rate and satisfaction.**”

WHAT BUYERS EXPECT OF FUTURE OBTs...

“If you have to mandate a corporate process then something is wrong. The corporate process should inspire the travellers”

“We need an enterprise solution with custom capabilities.”

CREATE AN EXPERIENCE
SIMPLISTIC
ALLOW FOR MORE MARKETING
LOCALISED
INTUITIVE
COMPANY BRANDING
PERSONALISED
RECOGNISE TRENDS
BUDGET TO BEAT
RICHER CONTENT
FEWER CLICKS
EMAIL & CALENDAR INTEGRATION
CUSTOMISABLE
CORPORATE PROFILE
MOBILE = DESKTOP

**FESTIVE ROAD IS ON A
MISSION TO CREATE
BETTER TRAVEL AND
MEETINGS MANAGEMENT**

**TO FIND OUT MORE CONTACT US AT
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