

GLOBETRENDER THE FUTURE OF BUSINESS TRAVEL

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THE FUTURE OF BUSINESS TRAVEL

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Welcome to Globetrender's *Future of Business Travel* report (published September 2020), which has been co-produced with *Business Traveller* magazine, in association with our sponsor American Express Global Business Travel.

It's not easy predicting the future of travel, let alone at a time of turmoil. However, thanks to a bespoke, in-depth survey of global business traveller sentiment conducted in July and August, combined with expert forecasting from Globetrender, this report gives what we believe is a reliable snapshot of behaviour and trends for the next 12 to 18 months in the business

travel industry. From Employee Empowerment and Optimised Facetime, to Health Certificates and the Caring Economy, the nine trends Globetrender has identified represent both new and accelerated shifts taking place as a consequence of the Covid-19 pandemic, and the widespread adoption of out-of-office working.

Although business travel has been dramatically curtailed for many months, close to 40 per cent of respondents to the *Business Traveller* survey said they planned to begin travelling again for work before the end of 2020, while 8 per cent already are. However, unsurprisingly, health and safety now ranks much

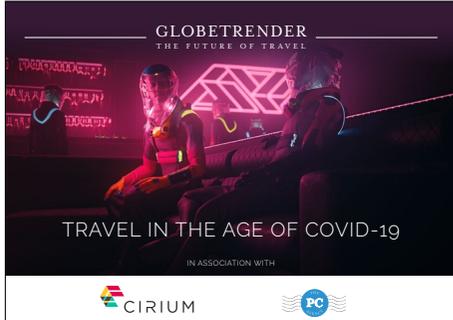
higher than it did before, and there will be far fewer handshakes taking place.

Of course, the return to business travel will, to some extent, depend on country restrictions and quarantine regulations, but the intention is there, and this is in spite of the lack of a vaccine yet. (If and when there is one, recovery will be quicker.)

Globetrender believes that key to reinvigorating business travel will be the widespread adoption of Covid-19 testing, both at home and at airports – particularly when it comes to transatlantic trade routes between the UK and the US, for example, which have so far been heavily restricted.

With the pandemic far from over, responsible corporates will be

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Travel in the Age of Covid-19
(free report)**



**Download Globetrender's
China Next: The Future of
Luxury Tourism (free report)**

dealing with profound ethical and moral decisions when it comes to balancing people and profit. There will also be social challenges to surmount when it comes to meeting again in person. However, Globetrender believes that increased empathy, tactical efficiency, long-lasting flexibility and greater creativity will benefit business travel – and travellers – for many years to come.

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Jenny Southan
Editor and founder

ABOUT GLOBETRENDER

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Globetrender is a digital magazine and travel trend forecasting agency dedicated to the future of travel. Founded by Jenny Southan, it delivers cutting-edge insights into how people travel in the 21st century, and its editorial and consulting services arm people with the knowledge they need to future-proof their businesses.

IN ASSOCIATION WITH WATERFRONT PUBLISHING

Waterfront Publishing (waterfront-publishing.com) is an independent magazine publisher based in London. It creates print, mobile and online media, and provides editorial, design, proofreading and marketing services. It is the publisher of *ABTA Magazine* and *Cruise Adviser*, both aimed at the travel trade.



JENNY SOUTHAN EDITOR AND FOUNDER

Jenny has 13 years worth of experience working as an award-winning travel journalist, with ten years as features editor of *Business Traveller* magazine, a job that enabled her to travel all over the world. Since leaving in 2017, she has been freelancing for titles such as *Condé Nast Traveller*, *The Telegraph* and *Mr Porter*, as well as running Globetrender. Her most memorable business travel reporting assignments were to Iran, Detroit, Azerbaijan and Cairo.



ROSE DYKINS CONTRIBUTOR

In addition to being a writer, researcher and online editor for Globetrender, Rose is a freelance travel writer and editor, and formerly staff writer for *Business Traveller*. Her work has been published in *The Telegraph*, *Metro*, *The Sunday Times Travel Magazine* and various in-flight magazines. She has a particular interest in the future of work, and innovations that help people work agilely, efficiently and safely while running a business from their laptops, wherever they are.



OLIVIA PALAMOUNTAIN CONTRIBUTOR

Olivia is a freelance travel and lifestyle writer and editor. She has created publications including international business title *Milestone* magazine and her work has been published in the likes of *The Telegraph*, *The Guardian* and *City AM*. She is fascinated by the new and the next, with a special focus on how communication trends and technology are disrupting traditional boundaries among work, rest and play. She is also a writer, researcher and online editor for Globetrender.



MARISA CANNON CONTRIBUTOR

Marisa is a travel writer and editor, formerly deputy editor of British Airways' *Business Life* and *First* magazines and staff writer at *Business Traveller* magazine. She has covered business travel and corporate events sectors while working for *Business Traveller* in both Hong Kong and London, and has worked for brand titles including Jaguar Land Rover, IAG Cargo and Regus. She is also a frequent writer and forecaster for Globetrender.



MICHELLE HARBI CONTRIBUTOR

Freelance journalist and editor Michelle writes about all aspects of business travel, specialising in aviation and accommodation. She was formerly managing editor of *Business Traveller* magazine. For this report she explored how some aspects of the business travel experience will change for the better in the post-Covid world – from touch-free journeys through the airport to greater employee empowerment when planning trips.

GLOBETRENDER

**From a collective
pause to getting
back in the race**

Globetrender, the UK's leading travel trend forecasting agency, is helping travel and tourism companies navigate what's coming next through bespoke consultancy

If you would like individual guidance on how to future-proof your company, email editor and founder Jenny Southan at jenny@globetrender.com

Download Globetrender's latest trend reports at globetrender.com/downloads



ABOUT BUSINESS TRAVELLER

Business Traveller is the leading magazine for the frequent business traveller, with 14 editions worldwide – in the UK, US, Asia-Pacific, Middle East, China, France, Germany, Denmark, Hungary, Africa, Russia, Poland, Israel and India, as well as a number of websites including businesstraveller.com.

With editorial staff based in our offices around the globe, *Business Traveller* is uniquely placed to ensure that each edition reflects the needs of our readers locally.

Launched in the UK in 1976, the magazine has expanded into events with frequent lunches, dinners, drinks and presentations to our readers, who enjoy meeting one another and swapping tales and tips from their travels. The knowledge gained

from these events not only informs future editorial pieces for the magazine, but led to the establishment of a research arm: Business Traveller Insight.

Business Traveller is a consumer publication aimed at entertaining business travellers, saving them money and making their travelling life easier. Each edition is packed with editorial on the latest news about airlines, airports, hotels and car rental.

We review travel products, including the latest gadgets, technology and accessories designed to make the traveller's life easier and more efficient. And we look at destinations – where to stay, what to eat, what to see and how to behave, all delivered by our own writers and journalists around the world.

In addition, loyalty programmes are examined, deals and promotions are collected and feature stories cover a wide range of issues such as health, security, technology, golf, automotive, financial and buying property.

Lastly, we don't forget that frequent corporate travellers are often the most frequent leisure travellers, so we examine where to escape on your next break and what to do if you are lucky enough to get time off when travelling on business.

Every day, tens of thousands of visitors read the latest news at businesstraveller.com, and when they fly, they have the option of watching *Business Traveller* television on board dozens of the leading airlines through the in-flight entertainment systems.



For more information
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METHODOLOGY

QUANTITATIVE DATA

For this report, Globetrender partnered with market research company Business Intelligence, in association with *Business Traveller's* Business Traveller Insight division, to conduct a July-August 2020 survey of global business traveller sentiment in relation to the Covid-19 pandemic.

SURVEY RESPONDENT PROFILE

The final sample was of 2,020 *Business Traveller* readers – with 43% from the UK, 18% from Asia, 12% from North America, 11% from Western Europe (including Scandinavia), and 8% from Australasia (8% were collectively from the Middle East, South America, and Eastern and Southern Europe, including Turkey).

65% of respondents were either owners or partners in their businesses, or senior management/director level. They had flown an average of 22 times each in the 18 months preceding July 2020.

In terms of the size of business they worked for, 39% were part of teams of up to 50 people, while 21% worked for major companies of more than 10,000 employees.

16% worked for firms between 1,001 and 10,000 employees. 10% worked for companies of 101-500 people; 5% for 501-1,000; 5% for 51-100 (4% don't know).

ANALYSIS AND TREND FORECASTING

At Globetrender, we focus on qualitative research underpinned by quantitative data. We always consider how the life cycle of a trend moves from the innovators that trigger them on the minority fringes to the early adopters, early majority, late majority and, finally, the laggards.

When searching for trends, we apply the "three times" rule. A one-time occurrence is an anomaly, twice is a coincidence and three times is a trend, worthy of further exploration.

The identification and naming of trends is based on IOI: Intuition, Observation and Investigation. This is both a creative and academic process. For every "micro" trend, we also consider the "macro" trends that represent the wider cultural shifts in consumer desires, motivations, values and behaviours around the world.

These are based on STEEP – Social, Technological, Economic, Environmental and Political – forces. Innovation is at the root of every trend, so we are always looking at what is new and disruptive. Just like news reporters, we ask the questions "who", "what", "where", "why" and "when"? But like investigative journalists, we then dive much deeper.

By discovering multiple examples of a trend, conducting desk- and field-based research, interviewing insiders and producing case studies, "qualitative" proof of it is generated. At Globetrender, we rely on our unique access to travel industry experts and ongoing consumer observation to remain ahead of the curve. Email jenny@globetrender.com for further insights and bespoke consulting into the travel of tomorrow.

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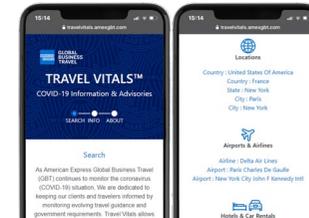
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EXECUTIVE SUMMARY

This 2020 report on the *Future of Business Travel* has been co-produced by travel trend forecasting agency Globetrender and *Business Traveller* magazine. After conducting a survey of more than 2,000 business travellers across the world, our analysts were able to identify the key patterns in behaviour and sentiment, as well as how these fit in with emerging trends on a macro level.

No one needs to be reminded that business travel has been decimated by the global Covid-19 pandemic, but what this report reveals is how the business travellers of tomorrow will be responding and adapting. Interestingly, for example, just over one in ten corporates have been travelling throughout the crisis in spite of restrictions, while almost 50% are either travelling now or expect to be by

the end of the year.

Of course, well-being is now a major concern, with health and safety now ranking as equally important to price when booking a trip. That said, the resilient, mission-driven mindset of the business traveller is revealed in the data: it shows that the majority of people are either completely or somewhat confident about travelling on business again. Only 13% are not confident at all.

Until there is an effective vaccine widely available, having the option to fly in first or business class is the thing that would most incentivise people to travel for work again, in addition to high levels of cleanliness on transport and going to destinations with good healthcare systems. Most people would be willing to take a Covid-19 test to avoid quarantining – and most

wouldn't travel at all if they have to self-isolate for a period.

Another key finding from the survey was the fact that despite the shift to remote working and the subsequent widespread adoption of video-conferencing, just over three quarters of business travellers think that face-to-face meetings with clients are preferable for sales meetings and pitches, while 60% agree that the majority of deals and decisions can't be made virtually.

So although day-to-day work can be done outside of the office, it doesn't mean Zoom will be replacing business travel. What we can expect is greater critiquing when it comes to the value of travelling for meetings, especially internal ones.

What are the chances someone will reach out to shake your hand?

One in four if they are aged between 25 and 54. (Older people will be a little more cautious.) Trust will play a big part in rebuilding business travel confidence going forwards – trust in other people that they have washed their hands, trust in employer duty-of-care policies that they will be looked after if they get ill, and trust in hotels and airlines that they have sanitised interiors appropriately, which is

why the vast majority of corporates will be sticking to familiar travel brands.

Going beyond the data, this report covers nine trends shaping the future of business travel: Employee Empowerment, Smartphone Centricity, Optimised Facetime, Health Certificates, Automated Gateways, the Caring Economy, Ultra Flexibility, Corporate Nomads and Airline Innovation. The research concludes with a series of

case studies and expert interviews with industry thought-leaders who share their predictions on what's coming next.

WANT TO KNOW MORE?

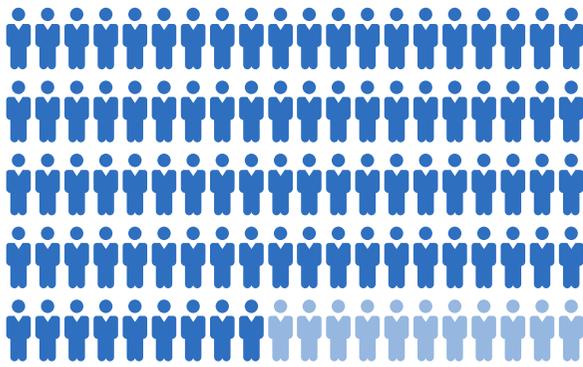
If you are interested in learning more about the data, email enquiries@businesstraveller.com

For bespoke consulting on the future of business travel, email jenny@globetrender.com

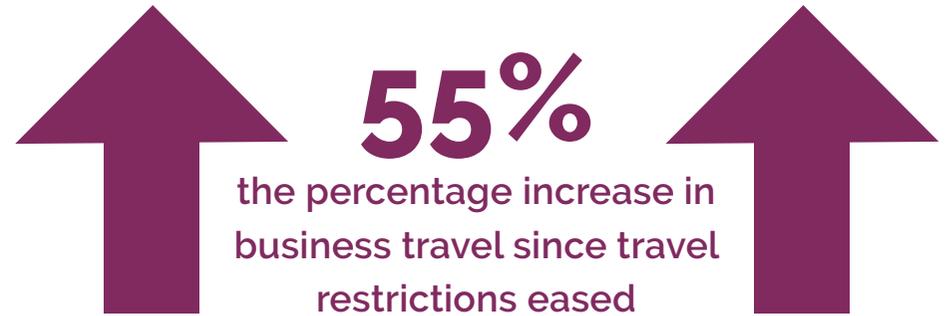


THE EFFECT OF COVID-19 ON BUSINESS TRAVEL

89% of business travellers around the world stopped travelling when there were travel restrictions in their region during the pandemic



55%
the percentage increase in business travel since travel restrictions eased



11% of business travellers travelled when there were travel restrictions during the pandemic

Of those that did travel for business during this time, 41% were at the most senior levels – owner/partners



17% have travelled since lockdown travel restrictions eased (mainly short-haul or domestic)

91% would be less likely to travel if they were required to quarantine at their destination

85% would be less likely to travel if they were required to quarantine when they returned home



THE MOST IMPORTANT FACTORS WHEN BOOKING A BUSINESS TRIP



Health and safety is now a major concern for business travellers.

Before the Covid-19 pandemic, only 5% ranked health and safety as the most important factor when booking a trip **VS** 40% during the pandemic

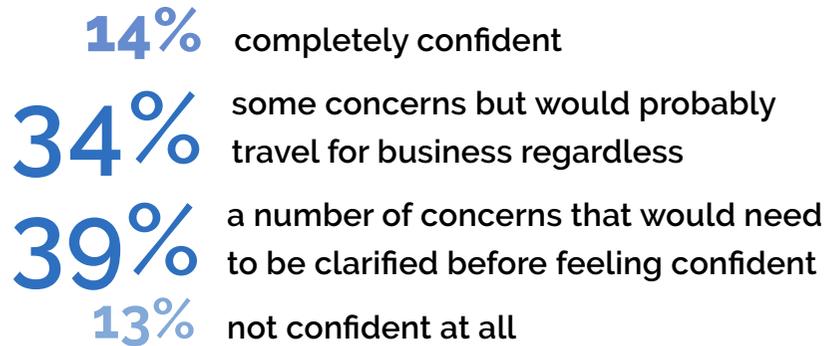


WHEN RANKING THE MOST IMPORTANT FACTORS WHEN BOOKING A BUSINESS TRIP BOTH **PRE-PANDEMIC** AND **DURING**, THESE WERE THE TOP FOUR RESULTS:



BUSINESS TRAVELLER CONFIDENCE

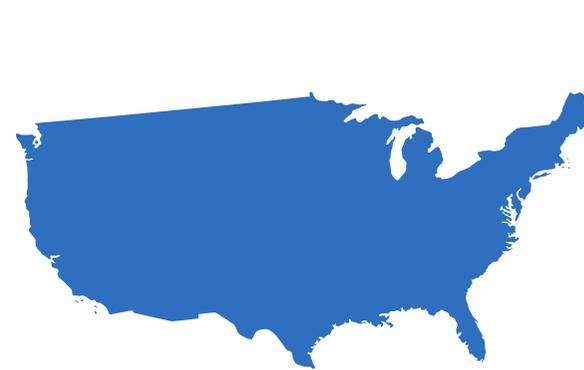
How confident are business travellers about travel in the future?



What conditions would mean people were more likely to travel for business in the future?
(Respondents were asked to rank the top three in order of importance)

- Vaccine for Covid-19 **80%**
- Ability to travel in business or first class **75%**
- High standards of hygiene on transport **74%**
- Travelling to a destination with a good healthcare system **69%**
- Purpose of visit could not be achieved remotely **65%**
- Needed to travel to a destination that you know well **63%**
- 'Travel corridor' in operation to destination **61%**
- Confident no new restrictions introduced during your trip **61%**
- Quick Covid-19 test on arrival **59%**

BUSINESS TRAVELLER CONFIDENCE



What would business travellers be willing to do to increase confidence/ease of travel?

77%

Take a Covid-19 test to avoid quarantine

65%

Take an antibody test for health certificate

64%

Wear a face mask while travelling

53%

Upgrade class of travel

47%

Fly direct rather than change planes

47%

Acquire a biometric 'fast pass' through a travel gateway

Regional confidence

Respondents from the **UK** and **US** are more confident about starting to travel on business again than those from **Australia** and **Asia**



THE FUTURE OF VIRTUAL WORKING VS BUSINESS TRAVEL



HEALTH AND SAFETY

58% say their company's duty-of-care policy is much stricter since the pandemic

To what extent will business travel be preferable to remote working, once travel bans are lifted?

76% agree that being face to face with clients is preferable to remote working for sales meetings and pitching

55% agree that remote working is not satisfactory for HR

60% agree that the majority of deals and decisions cannot be made virtually

70% agree that most meetings cannot be achieved more efficiently and concisely remotely

78% say they wouldn't shake hands in a meeting



25% of people aged 25-54 would be happy to shake hands in a meeting



19% of people aged over 55 would be happy to shake hands in a meeting

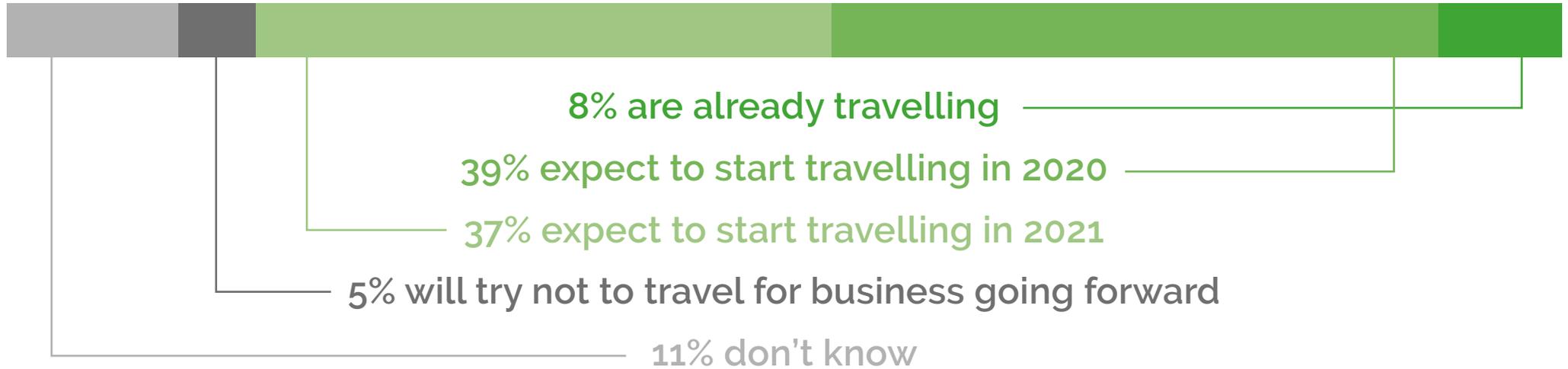


SUSTAINABILITY

67% view remote working as a way to help kickstart carbon footprint reduction

GETTING BACK ON THE ROAD

When will business travellers start travelling again?



How has Covid-19 affected your travel budget?

- 38%** say travel budgets have remained stable
- 31%** say travel budgets have been reduced
- 31%** say travel budgets have been severely or entirely cut



How important will be using familiar travel brands?



- 87%** say they are likely to stick with the airlines they know and trust in the future
- 80%** say they are likely to stick with the hotel brands they know and trust



Missing the view?

If you are interested in learning more
about this survey please contact
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EMPLOYEE EMPOWERMENT

As travel bans lift, tech companies and TMCs will be unveiling new online tools and real-time information services to give corporates the confidence to get back on the road.

By Michelle Harbi

EMPLOYEE EMPOWERMENT

If there are any upsides to be found amid the devastation caused to the travel industry by the pandemic, then one will surely be the growth in Employee Empowerment as travel management and technology companies create new tools that put the power in travellers' hands and allow them to make informed decisions about their future trips.

While business travel has been on pause, providers have taken the opportunity to develop services that will give employers and employees the confidence to get back on the road when the world reopens. We've noticed a trend, in particular, for TMCs (travel management companies) and third-party software developers introducing new platforms that provide clients and travellers with the real-time Covid-related information they need on

destinations, transport and hospitality providers worldwide.

In this, they are playing a key role in getting companies moving again. As travel technology firm Amadeus put it in its June report, *Insights for the New World of Travel: From Human Touch to Human Tech*: "The demand for the latest and most updated information is crucial for travellers: from the health status at their destination, to travel rules or conditions, to key information on hygiene standards at their hotel. Providing travellers with useful and current information will be fundamental to regaining their trust and reassuring them that travel is safe."

In July, American Express Global Business Travel unveiled Travel Vitals – an open "briefing platform" for travellers, travel managers and

TMCs to access up-to-the-minute information on the global Covid-19 situation. Free to use, it aggregates data from hundreds of sources, allowing users to search for updates by destination, airline, airport, hotel chain, rail operator or ground transport provider (see case study, page 40). Other TMCs are rolling out tools designed to track the virus, assess risk and aid the decision-making process.

Corporate travel technology provider Deem plans to introduce its own risk-management tool in early autumn. Called Travel Safety Check, it will be included free for clients using Deem's platform and will offer "curated, real-time key data points across hotel, ground and flight offerings", including information on cleanliness procedures and virus hotspots.

John F Rizzo, Deem's chief executive, said: "We have an opportunity and an obligation to help business travellers feel confident about being on the road again, empowering travellers to make the best choices for themselves and their businesses."

Also boosting employee autonomy is the gradual reopening of online booking tools – when the pandemic broke out, many companies switched them off and instructed staff to make any

essential bookings by phone to better control their movements.

If there is another upside to all of this, it is that the huge dip in air travel has led to significant global carbon emission reductions. This is another area in which American Express Global Business Travel is seeking to empower travellers – in June it added a carbon emissions filter to its Neo self-booking tool, enabling users to filter their search results for air and rail travel in order of emissions.

SAP Concur, meanwhile, has extended access to its TripIt Pro travel organising app – previously only for individuals – to EMEA corporate users of TripLink, its tool for capturing bookings made direct with suppliers. As well as aiding with traveller tracking, the app suggests ways for flyers to offset their carbon footprint and includes neighbourhood safety scores that factor in Covid-19 data – helping travellers to feel happier about flying once more.

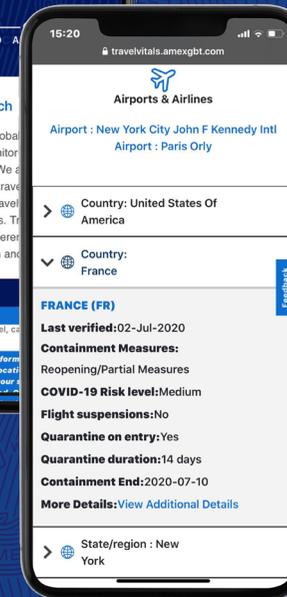
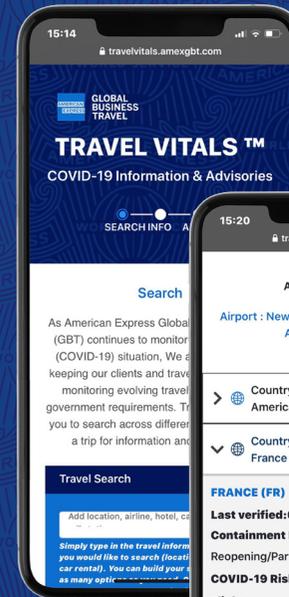




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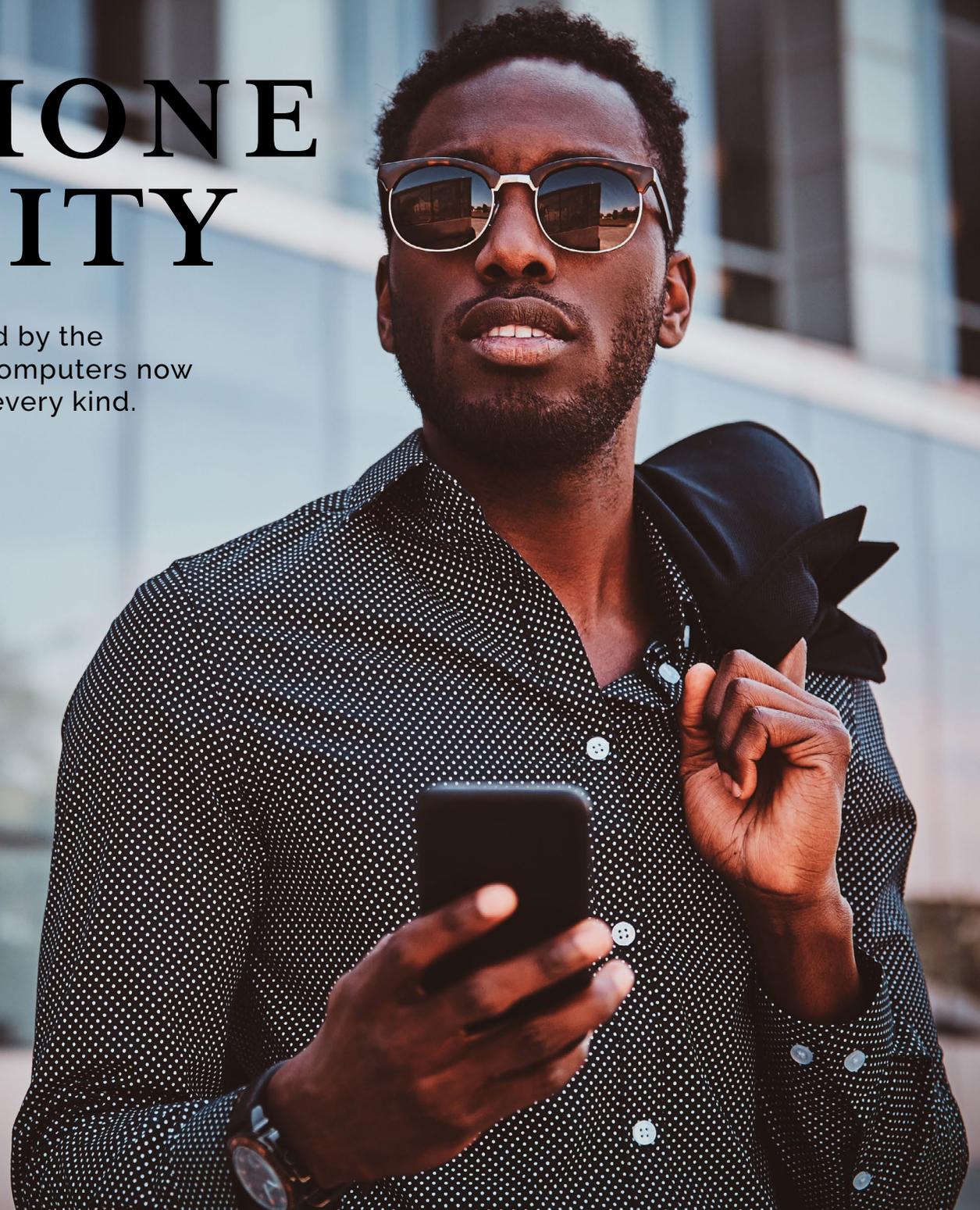
**DON'T BOOK A
TRIP WITHOUT IT**

DON'T *do business* WITHOUT IT™

SMARTPHONE CENTRICITY

The digitisation of travel is being accelerated by the pandemic, with palm-sized personal super computers now vital for making contactless transactions of every kind.

By Marisa Cannon



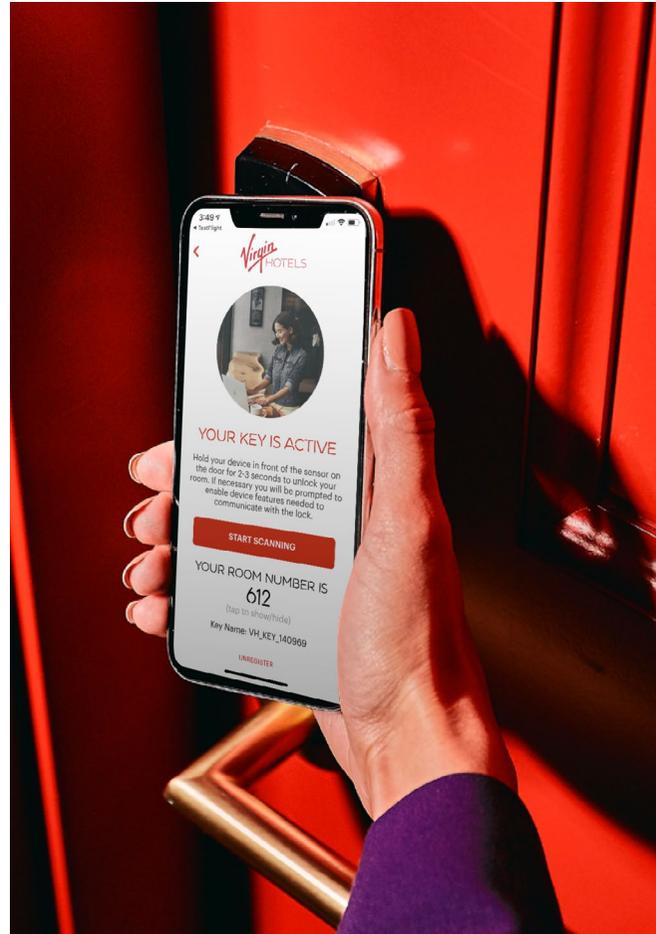
As the effects of Covid-19 ripped through the global economy, hoteliers, airlines and travel brands quickly realised that a return to market would require drastic changes to the way they operate, much in the same way that air travel and security transformed in the wake of 9/11. Digitisation has, and will continue to be, one of the key vehicles for this change as customers look for ways to do business, travel and make transactions without coming into contact with unnecessary touchpoints.

Recognising the acceleration of "Smartphone Centricity" (a trend that Hilton and Marriott hotels helped kickstart a few years ago with keyless entry, for example), Virgin Hotels upgraded its mobile app Lucy with new contactless features in July 2020, enabling guests to check in and unlock room doors

with their mobiles, as well as control lighting and activate "do not disturb" signs. Citizen M rolled out a similar feature for its properties in the summer, while five-star Peninsula Hotels launched a "PenChat" e-concierge service for 24-hour instant messaging (no more picking up the bedside phone) in the spring.

In the world of long-stay accommodation, serviced apartment providers The Ascott Limited intends to review the design and layout of residences, ensuring they are "future-ready for continued growth", with plans to include thermal scanning sensors to track footfall and crowds. A mobile app is set to launch later this year, offering guests contactless apartment entry, payments and check-in/check-out.

Swiss-based airport tech company SITA is working on a tool that will enable passengers



to use their smartphones to check in, verify their identity and pass through passport control at multiple airports worldwide, while Manchester airport is offering travellers the

opportunity to pre-book 15-minute security slots, ensuring crowd control and social distancing are maintained.

British Airways has launched a digital iteration of the airline's *High Life* in-

flight magazine, accessed through free onboard wifi portals, while passengers on all airlines are being encouraged to stream or download entertainment on their own devices to discourage use of backseat touchscreens.

Expense management is another area where contact is being reduced. American Express Global Business Travel's Neo travel and expense platform has optical character recognition capability, which automatically takes in travellers' expense details when receipts are scanned, circumventing the need to handle, store and submit paper versions.

Travel managers across the board are enhancing their contactless services, with many now offering push notifications direct to client mobiles, which include government advisories, destination updates, and reminders

to pack face masks or pre-book safety-approved airport transfers.

The argument for analogue travel services is growing weaker still, with many clients, especially of millennial and younger generations, preferring digital interaction over human. "Successful travel providers will continue refining the blend of human resources with artificial intelligence to drive better and more efficient customer service," says Raksa Ouk, senior director of digital traveller experience and product marketing at American Express Global Business Travel.

She says: "Many of today's business travellers are happiest self-booking on a platform that serves them the best choices with clarity and simplicity, and when they want the human touch for support or expertise, they may well prefer live webchat to making a phone call."



OPTIMISED FACETIME

Video-conferencing will remain an integral part of the way people work but the need for face-to-face human interaction will be more pronounced than ever, especially when it comes to securing deals.

By Jenny Southan

One of the big questions hanging over the industry is: will video-conferencing replace business travel, now that everyone has been forced to embrace it and can acknowledge its benefits? The simple answer is no.

In fact, while technology from Zoom and competing companies such as Microsoft Teams, BlueJeans and Google Hangouts will remain a core part of the way companies operate in the Covid world and beyond – its main use will be for internal meetings and as a replacement for face-to-face communication within offices as remote working takes over (see page 31 for our Corporate Nomads trend).

Video-calls during the pandemic haven't been what has prevented business travel from occurring – it has been travel bans. As data from

our survey of *Business Traveller* readers revealed, there has been a 55% increase in business travel since lockdown restrictions eased, and by the end of 2020, almost half of business travellers expect to be back on the road again, with another 37% expecting to be travelling in 2021.

What's holding them back right now? Quarantines are a big hurdle – according to our survey, 91% would be less likely to travel if they had to self-isolate for a period at their destination.

Andrew Crawley, chief commercial officer for American Express Global Business Travel, says: "The inability to travel freely has reinforced the value of meeting in person. Video-conferencing has been very useful, but we have all been operating in a diminished state. Many of our clients have talked about how video technology has

helped them 'get by' – but serious companies and organisations don't want to just 'get by'. To build a positive culture, to develop bonds and relationships, to cultivate creativity and inspire people, we need to meet face-to-face."

With huge pent-up demand for business travel, and the fact that 76% of frequent flyers surveyed by *Business Traveller* agree that being face-to-face with clients is preferable to remote working for sales meetings and pitching,

flight bookings will begin to resurge.

However, due to the increased risk to health and safety, and the fact that travel budgets for many companies will have been reduced, facetime with clients will need to be optimised.

There will need to be a clear return on investment for all trips undertaken.

With less spending on team meetings, some companies will have more budget available for sales trips, which will be critical for rebuilding balance sheets after the crisis.

According to our survey, 60% of business travellers believe that the majority of deals and decisions can't be made virtually, which suggests that there will be a rush to meet with clients and "green light" projects as soon as it becomes possible to do so.

"Zoom fatigue" (a condition that relates to mental exhaustion from too much video-conferencing) is real, after all, and if anything will be whetting people's appetite for sitting round a real-life table. Even if it means wearing a face mask and not shaking hands.





HEALTH CERTIFICATES

Creating a rigorous Covid testing and certification system that is valid, credible and internationally recognised is a major challenge. But until a vaccine is widely available, this will be the best solution for business travel.

By Rose Dykins

HEALTH CERTIFICATES

For the sake of the global economy, it's encouraging to see nations with closed borders making exceptions for business travellers. For example, although Australia's international travel ban will likely be in force until some time in 2021, Prime Minister Scott Morrison has suggested there will be some scope for "essential business travellers" to come and go. However, when it comes to gaining access, arrivals will need to have proof of a clean bill of health, something that will become as vital as a passport in months to come.

A sensible alternative to blanket quarantines, health certificates make business travel considerably more viable. Quarantine requirements not only mean two weeks of isolation for travellers, but the conditions are constantly reviewed and

changed at short notice when Covid-19 cases rise. For example, Singapore recently made it mandatory for passengers arriving from Hong Kong, Japan and Australia's Victoria state – all of which have seen a surge in cases – to spend their 14-day quarantine in a dedicated facility, instead of their place of residence.

The International Air Transport Association (IATA) has urged governments to avoid quarantining air passengers in favour of a "layered approach" of measures. For travellers coming from countries deemed to be higher risk, this includes Covid-19 testing prior to arrival at the departure airport, with documentation to prove a negative result. Still, destinations vary wildly in the health certification they now require – and loopholes for business travellers aren't without risk either.

Since July, all air passengers flying to China have to present a negative Covid-19 test before boarding the plane. They must have taken a test within five days before boarding in a facility recognised by overseas Chinese embassies or consulates. Meanwhile, a reciprocal "fast lane" agreement is in place for essential business travellers flying between six Chinese provinces (Chongqing, Guangdong, Jiangsu, Shanghai, Tianjin and Zhejiang) and Singapore (see case study on page 39).

The Safe Travel Pass requires business travellers from the two nations to get tested upon arrival and remain in local-authority-mandated places for one to two days until the test result comes through. If they test positive, they must undergo treatment straight away, at their own expense. If not, they



are free to hit the ground running and carry on with their business.

Other destinations have introduced Covid-19 testing on arrival for all inbound passengers to give them an option other than quarantine. For example, Vienna airport charges arriving passengers €190 for the service, and the British government is being lobbied to do the same – at the time of writing, Heathrow airport's Terminal 2 was about to

pilot a paid-for service.

Looking ahead, as more becomes known about how the virus is transmitted, predictive technology could replace physical testing. For example, Etihad has launched a Covid-19 risk assessment tool, soon to be added to its mobile app. Created in partnership with Austrian healthcare company Medicus AI, it's a five-minute questionnaire that helps travellers evaluate the probability

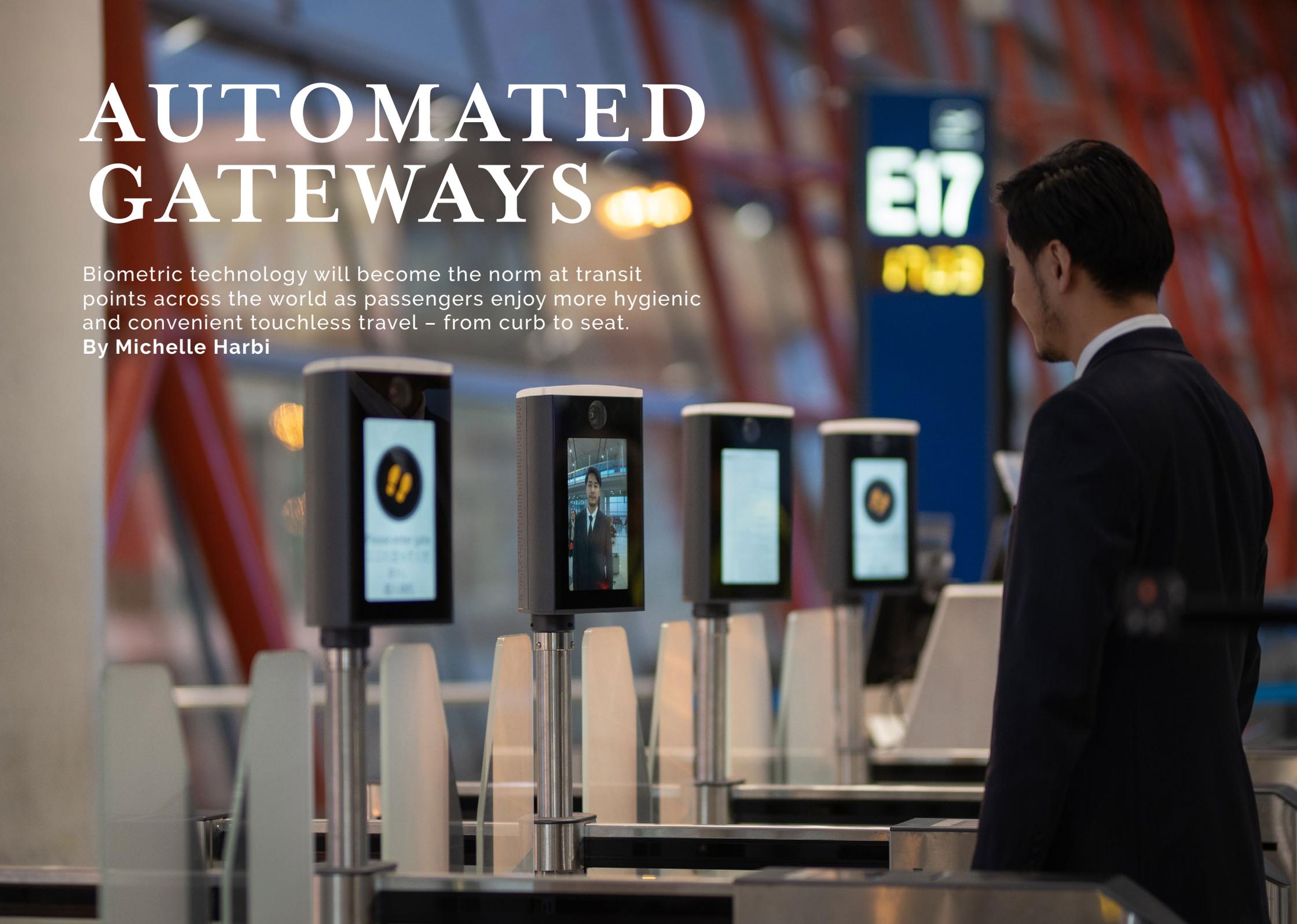
that they've contracted the virus. Sophisticated AI technology could eventually be an alternative option for certifying business travellers' health.

For now, the tech works in tandem with the rest of Etihad's new measures, including its "Fit to Fly" self-service check in and temperature screening service at Abu Dhabi airport, which checks travellers' heart rates, temperatures and respiratory systems.

AUTOMATED GATEWAYS

Biometric technology will become the norm at transit points across the world as passengers enjoy more hygienic and convenient touchless travel – from curb to seat.

By Michelle Harbi



AUTOMATED GATEWAYS

Using your face as a passport will soon be a much more common feature of the business travel experience. A growing number of airports have been introducing biometric technology to streamline the passenger journey through the terminal, and that trend is set to accelerate swiftly in the post-Covid world as authorities seek to mitigate risk and limit human interaction.

Using facial recognition to clear immigration is not new, but it's in the whole end-to-end journey from curb to gate that great strides are now being taken. Delta Air Lines was one of the pioneers of this, in late 2018 launching the first "biometric terminal" in the US at its Atlanta hub, allowing passengers to check in, drop their luggage, pass security and board using facial recognition.



The same year, SITA, an IT company specialising in aviation, reported that 71 per cent of airlines and 77 per cent of airports were planning major programmes or research into the technology. SITA chief executive Barbara Dalibard believes the Covid-19 crisis will speed up adoption, telling travel tech news site

PhocusWire in July: "I was talking to a group of customers recently and they said it would be major for them, to make sure they could implement biometrics as quickly as possible." SITA's Smart Path facial recognition system is in use at the likes of Beijing Capital, Qatar's Hamad International and Kuala Lumpur.

In May, Ibrahim Ibrahim, managing director of Portland Design, a London-based consultancy that has worked with a number of airports, told *CNBC Global Traveler*: "We are seeing five years' innovation in five months, and much of the impact will be permanent. We will see a turbo-charged uptake

on tech-driven, zero-touch check in, security and boarding."

Airports such as Heathrow and Dubai International have been spending big on biometrics in the past couple of years, with Emirates having installed a "biometric path" from check in to boarding at its hub's Terminal 3. British Airways, American Airlines and Lufthansa are among the carriers using biometric boarding in some locations. Rome Fiumicino began trials at security and boarding at the start of this year.

Star Alliance is working with Japan's NEC Corporation on a biometric data-based identification programme that will allow members of its carriers' frequent flyer schemes to "pass through curb-to-gate touchpoints" in participating airports.

Singapore Changi has responded to

the pandemic by upgrading its automated immigration lanes with a face and iris recognition system replacing traditional fingerprint scanning, and rolling out contactless check in and bag-drop kiosks. American Airlines has introduced touchless bag-drop for domestic passengers across more than 230 airports.

And it's not only airports that are looking to make journeys safer and speedier. From March next year, Eurostar will start trialling facial recognition, too, allowing rail passengers to pass through a "biometric corridor" to board services at St Pancras International.

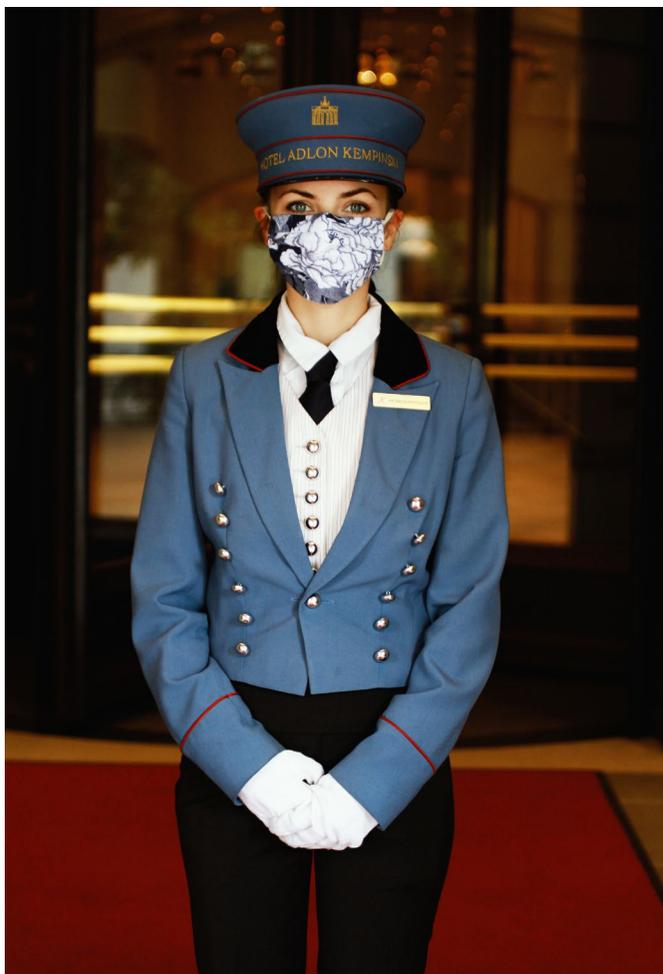
Some people may have privacy concerns about the use of such technology but, post-Covid, many may see it as an acceptable price to pay for staying healthy on the road.

CARING ECONOMY

Recognising that health and safety is now equally important to business travellers as price, savvy airlines, hotels and travel management companies are doing everything they can to ensure the individual is protected.

By Marisa Cannon





In an effort to restore confidence among business travellers, the industry is ramping up efforts to make travel safe again. Among these are a range of enhanced duty-

of-care policies, as well as new hygiene and health protocols across airlines, airports and hotels.

In the age of Covid-19, corporate travel policies will put employee safety

first – at the expense even of business performance. Global health insurance may become mandatory for business travellers, and greater interest in “premium” policies may begin to build, says Laura Hay, global head of insurance at KPMG.

Major insurers such as Allianz and Axa have developed policies that include cover for pandemic-related cancellation across insured events, as well as varying degrees of overseas medical assistance. Business travel insurance in Italy, which was one of Europe’s worst-affected countries during the peak of the outbreak, is the market segment expected to grow the most in the next seven years, with an estimated jump of 15.6%.

Airlines are also trying to provide reassurance. In July, Emirates said it

would cover the cost of passengers’ medical expenses up to €150,000 with a daily €100 quarantine allowance for 14 days should they be diagnosed with Covid-19 during travel. Etihad subsequently launched a similar wellness insurance scheme for people on flights operating until the end of the year.

Traveller tracking tools will also see enhanced adoption, not only monitoring a traveller’s destination and accommodation, but who they plan to meet and where. This will invite greater protections around privacy and data controls, alongside clear advice around the ethical use of traveller tracking technology.

Corporate travel managers will, in addition, need to work with risk management providers to monitor high-risk zones and disable booking requests on online

booking tools to cities where the infection rate is no longer at a safe level.

According to an IATA survey conducted in July, a third of travellers said that they would avoid travel to mitigate their exposure to Covid-19, but the top three measures that would make them feel safe are airport screening, compulsory face masks and social distancing on aircraft. Airlines have taken this stance on board, with many dressing cabin crew in full PPE, and mandating the use of passenger face masks and even face shields (in the case of Qatar Airways).

Hotels across the world have ramped up cleaning procedures, focusing on public touchpoints such as door handles and elevators, as well as enhanced in-room sanitisation. IHG is working with the Cleveland Clinic in the

US to develop resources such as the availability of individual guest amenity cleaning kits, and hand sanitiser and disinfecting wipes in rooms. Marriott has adopted electrostatic sprayers with hospital-grade disinfectant to sanitise all surfaces, plus signage in lobbies to remind guests to socially distance.

In the UK, Southend airport is working to minimise touchpoints during passenger screening, installing equipment that can scan hand luggage without the need to remove liquids and electronics from bags. It is also installing more self-service bag drops to avoid staff coming in contact with luggage. London City airport has installed “CrowdVision” technology that uses smart cameras to detect where clusters of people are gathering, so that staff can channel passengers elsewhere.

ULTRA FLEXIBILITY

Free cancellations, date changes and elite status extensions will become par for the course as the industry attempts to bolster future bookings.

By Marisa Cannon



ULTRA FLEXIBILITY

Covid-19 and cancellations have become synonymous in the world of travel, with flexibility the word on every travel buyer's lips. A poll from the Global Business Travel Association (GBTA) published in July found that more than half of TMCs have changed their travel policies to include clarifications around unused tickets and more detailed pre-trip communications, a trend that is set only to intensify as business travellers look to safeguard their trips against evolving travel restrictions.

Free cancellations, date changes and elite status extensions are now standard among major hotels and airlines, with United permanently eliminating change fees on economy and premium bookings for flights within the US. Delta is waiving change fees until September 2022 and

Qatar Airways is allowing unlimited date changes until the end of 2020.

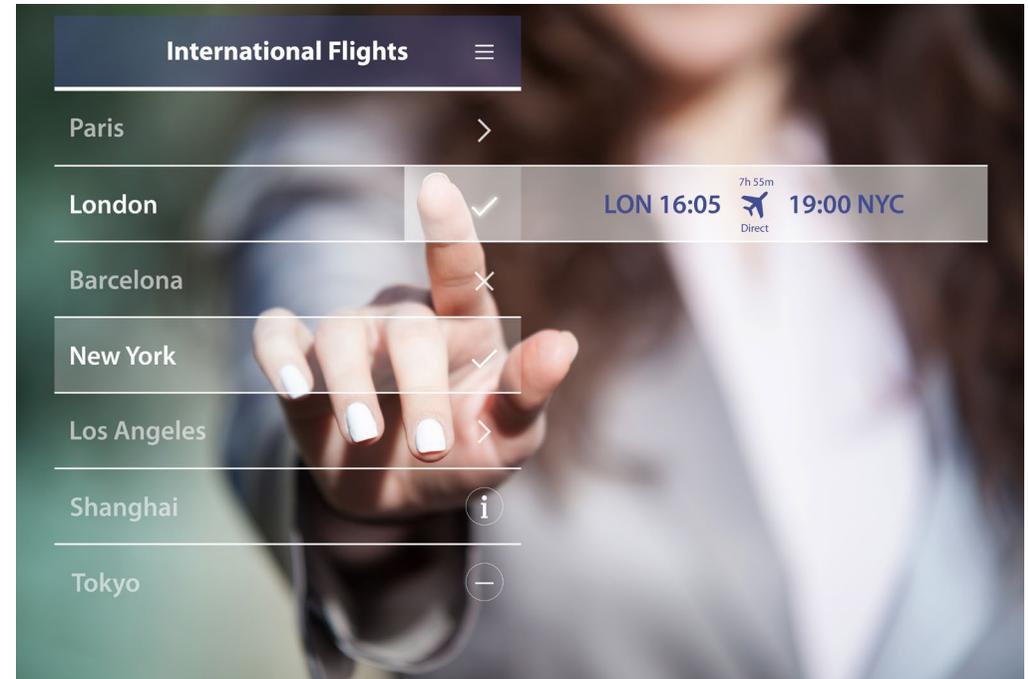
In the same vein, members of elite airline clubs such as Cathay Pacific's Marco Polo Club, United's MileagePlus and British Airways' Executive Club will benefit from a one-year extension on their status, notwithstanding several caveats.

Major hotel groups such as Marriott, Hilton and Intercontinental Hotels Group (IHG) have instated short-term extensions on their cancellation policies, while Langham Hotels has gone further, extending its policy to offer full refunds on all stays up to December 18, 2020.

While demand for flexibility continues to soar, the pandemic has reinforced the importance of giving business travellers access to comprehensive offers that also meet their company's biosafety

standards, and pressure is on travel management companies to provide this visibility. "For hotel bookings, there could be a range of rates for a property, such as your corporate negotiated rate, the TMC's own special rate, or from providers such as Booking.com or Expedia," says Margaret Bowler, director of global hotel strategy at American Express Global Business Travel. "But as long as you're booking via the TMC channel, we can help determine which is the best rate for you, factoring in price, flexibility of cancellation terms, and what amenities are included."

As country entry requirements continue to shift, business travellers will look to cover all bases in the event of a sudden border closure, ensuring "know before you go" information is at their fingertips. Travel managers are looking



to meet these demands through security alerts, interactive risk destination mapping and Covid-19 dashboards offering information on the spread of the virus and health risk ratings for most frequently visited destinations. Having access to real-time updates on area lockdowns, quarantine measures and flight restrictions will be non-negotiable for

employees returning to business travel.

For meeting planners, flexibility is yet more crucial, with the threat of spiking drop-outs in the face of travel blockades. Wyndham Hotels & Resorts' "Count on Us" initiative, launched in May, has been expanded to the group's meetings and events business, offering heightened wiggle room for planners.

"We are working closely with [planners] on flexible cancellation fees, more flexible attrition," said senior vice-president of global sales Carol Lynch in an interview with *Breaking Travel News*. "We're working with them on reduced F&B minimums, anything we can do to add flexibility where they need it in order to just even plan. You really have to be flexible."



CORPORATE NOMADS

With many companies adopting 'out-of-office' working on a long-term basis, business travellers will be able to stay in the field for as long as they like.

By Rose Dykins



During the pandemic, businesses that were able to operate digitally were forced to implement blanket remote working to survive. And for some companies, there's no looking back. Nationwide, for example, has shifted to a 98 per cent remote working set up, and will transition permanently

to a "hybrid" model, where employees have access to an office but mostly work from home. Meanwhile, Twitter and Facebook have pledged to allow staff to work remotely "forever".

As working in a fixed location seems less necessary for so many, the trend for Corporate Nomadism – salaried employees with no fixed

location – has sped up rapidly. Formerly office-based employees have got a taste for flexible working and appreciated how it can boost their productivity, cut out their commute and enhance their work-life balance (those with young children may disagree...). A new wave of professionals will take remote working a step

further by packing their laptop and clocking in from a different country.

Hit hard by lost tourism revenue, certain destinations are marketing themselves to Corporate Nomads, who are seeking to stay for more than a couple of weeks. For example, the new Barbados Welcome Stamp permits visitors to work from the island under a 12-month visa, combining their career with a Caribbean climate. Chairman of the Barbados Tourism Marketing Inc, Sunil Chatrani, said:

"Barbados boasts the fastest fibre internet and mobile services in the Caribbean and, with a range of different flexible office space locations, the working environment in Barbados definitely enables you to get things done. As our country also offers excellent health care and a high education standard, we know it is ideal for

those who want to bring their families to the island for the 12-month period." The Barbados Welcome Stamp costs US\$2,000 per person, or US\$3,000 for families. Other countries offering similar visas for employed professionals and entrepreneurs include Bermuda, Georgia and Estonia (the latter was available pre-Covid).

Airbnb also plans to capitalise on the Corporate Nomadism trend. Its CEO Brian Chesky has forecast that professionals won't just want to work from home, they'll want to "work from any home". In April, the company feared a 54% decrease in year-on-year revenue for 2020, with short-term lettings taking a devastating hit. But moving forwards, Airbnb is focusing on longer-term stays – since the spring, about 80% of Airbnb hosts now accept longer stays, while half of

its listings offer discounts to guests who stay for more than a month. The option of longer stay combined with Airbnb's self-contained, homely accommodation would appeal to Corporate Nomads seeking a change of scene.

Monumental Marketing is a communications agency that currently has ten employees dispersed across the UK, Beirut and Switzerland. "We decided soon after lockdown was announced that we wouldn't be returning to the office until 2021," says the agency's CEO Jamie Love. "We decided that as long as the team was able to work UK hours, they could do so from anywhere. This was very well received. My team didn't want to be cooped up in their flat-shares, and would rather be with family and loved ones. It has had a great impact on happiness and wellness and, in turn, productivity."



AIRLINE INNOVATION

As civil aviation scrambles to recoup billions of dollars in losses, customers can expect to see wide-ranging improvements to flying, from more fuel-efficient fleets to anti-microbial aircraft interiors.

By **Jenny Southan**

AIRLINE INNOVATION

There is no denying the damage wreaked on commercial aviation, with airlines around the world collectively losing hundreds of billions of dollars. (According to industry body IATA, revenues from civil aviation will fall 50%, from US\$838 billion in 2019 to US\$419 billion by the end of 2020.)

However, IATA also predicts that in 2021, losses are expected to be cut to US\$15.8 billion as revenues rise to US\$598 billion. Alexandre de Juniac, IATA's director general and CEO, says: "Provided there is not a second and more damaging wave of Covid-19, the worst of the collapse in traffic is likely behind us."

What's interesting about times of crisis is that it forces a "survivalist" mentality on to people and companies, with the most resilient among us able to switch to

a mindset that turns negatives into positives, and challenges into opportunities. Loss, for some, will be unavoidable but what the global battle with the Covid-19 coronavirus is ultimately doing is accelerating changes that were already taking place (for example in terms of digitisation and sustainability) and catalysing mass innovation.

For those airlines that have managed to hang in there thus far, the next 12 to 18 months will be about creativity, thinking afresh and implementing new ideas, fast – not only to secure their business model but to restore customer confidence in flying again, which will mean a better experience for everybody, and hopefully the planet.

Harry Boneham, aerospace and defense associate analyst at GlobalData, says: "The campaign to reduce the



environmental impact of commercial aviation predates the current crisis, with concepts such as *flygskam* [flight shame] growing in prominence.

"However, a campaign to incorporate and accelerate the adoption of green policies in the economic restart following the Covid-19 pandemic has been gathering pace. For instance, in the European Union, air transport associations have called for decarbonisation to be prioritised in post-Covid-19 recovery funding. Among the initiatives suggested is

the replacement of older [aircraft] models which are on average 20-25% less fuel efficient than newer generations."

In addition to sustainability, which will remain high on the agenda, improved airline efficiency and technology will also be outcomes to look forward to. Route networks and fleets may be slimmed down, but in the grand scheme of things, flying full, modern, fuel-efficient planes will be better than sending aging, half-empty jumbos to all four corners of the Earth on a daily basis.

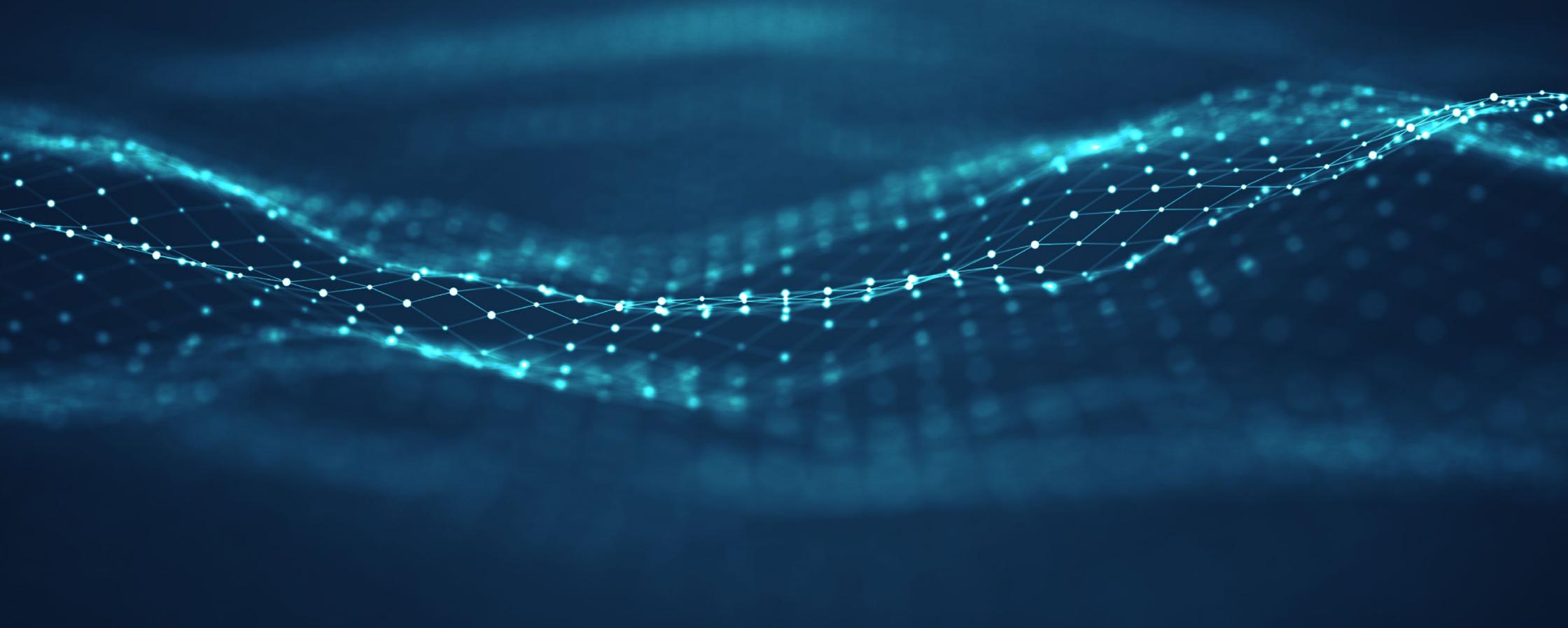
Travellers will be more discerning about the trips they book and airlines will be equally savvy about the places they offer connections to. ROI will be imperative. Dynamic pricing will be used to both entice and then capitalise on customer demand, while contactless technology and surgical-style sanitisation measures will mean spending time in airports and on planes will be better than ever.

In 2021, we can also expect innovation to start transforming onboard design, with the introduction of new seat types and even cabin classes. For example, design firm PriestmanGoode's Pure Skies concept (pictured on the previous page and on the cover of this report) envisions the introduction of fully enclosed "Rooms" in place of business class, with surfaces covered in an "anti-microbial finish".

Nigel Goode, founding director of PriestmanGoode, says: "Those companies who embrace innovation and invest in it – whether they be airlines or in any other sector of the economy – are those who typically succeed and deliver to growth in the long term. Clearly there are some pressing concerns in the present which take priority, but the process of innovation must be allowed to continue.

"Short-term fixes will not solve passenger anxieties or improve the overall experience for business travellers. To implement solutions that bring passengers back and meet certification standards, it will take time. Therefore, brands that want to differentiate their future offering to customers and be ready for increasing passenger numbers must start this process now."

CASE STUDIES & INTERVIEWS





Based in the UK, ITM (the Institute of Travel Management) was established in 1956 to support corporate travel professionals. The organisation now has more than 4,000 members across the UK and Ireland. Members are business travel buyers – who negotiate and manage corporate travel on behalf of companies

– and suppliers, brands that “supply” business travel, including airlines, hotels, ground transport providers, and meeting and events venues.

Accustomed to supporting its members through challenging times, ITM has continued its role in providing centralised, timely information and guidance for the business travel

industry during Covid-19.

“Corporate travel managers have been collaborating to establish protocols, processes and policies that are beginning to enable business travel once again,” says Scott Davies, CEO of ITM. “As markets, countries and cities open and adjust their entry requirements, travel management companies

and suppliers of all kinds are working hard to inform stakeholders and travellers and put in place the elements that build confidence in safety and hygiene throughout the journey.”

Since February, ITM’s community of buyers has been gathering online each week for “virtual huddles” to discuss the evolving Covid-19 situation, and how it is affecting the way they assist their clients. The insights gleaned from these webinars are then shared on ITM’s online Resource Centre, which has reports, updates, first-hand information – such as members’ personal experiences staying at particular hotels during the pandemic – and best-practice resources to help ITM members safely support corporate travellers.

ITM’s virtual huddles with its buyers are a chance to raise concerns

about the complexities of managing corporate travel during Covid-19 – be it cost, hygiene or general protocols.

For example, a recent ITM virtual huddle raised the issue of how subjective opinions about the severity of the risk, and the raft of new safety measures to be considered, are influencing the way business trips are being risk assessed.

“There was a discussion about how much can be dictated from a corporate level given that personal views [about Covid-19] need to be taken into consideration,” said Sandy Moring, ITM’s director of education, while sharing the buyer feedback.

“A couple of buyers have said they’re treating each journey as a project in its own right, and risk assessing it from beginning to end. That’s fine while the

numbers are as they are, but let’s face it, it’s not going to work when we’ve got more people travelling. And also, what answers come out [of a risk assessment] may be different according to the culture of the organisation, or the destinations involved.”

The Institute of Travel Management has also published reports sharing best business travel practice during Covid-19. Its “Covid-19 Pop-Up Policies” documents for buyer members pools knowledge from the network and makes it available for everyone to see. It means buyers can observe what their peers are doing to update company travel policies or support their clients, and it includes a risk assessment template to help standardise the process across the business travel industry.

BY ROSE DYKINS

CASE STUDY: VIRGIN ATLANTIC

Virgin Atlantic's Covid-19 journey typifies the near-impossible situation and tough decisions airlines found themselves facing at the start of the pandemic.

In March, Virgin Atlantic's leadership team took voluntary pay cuts. The carrier also moved forward the retirement of its final fuel-hungry Airbus A340-600 aircraft to strip out inefficiencies.

When British commercial flights were suspended in April, some 80% of Virgin Atlantic's workforce were granted access to the government's Coronavirus Job Retention Scheme. The same month, the airline shifted to a cargo-only set up, operating more than 1,400 passenger-free flights in April, May and June.

In May, the airline was forced to scale down, and 3,550 job cuts were made across all departments (more redundancies were

made in September). May also saw the airline close its Gatwick base – retaining a slot portfolio at the airport for potential future opportunities – and it now solely operates out of Heathrow and Manchester to New York JFK, Los Angeles and Hong Kong.

Sadly, the airline said in September that it does not foresee transatlantic flying from the UK extending "beyond current skeleton operations until the beginning of 2021".

Since Virgin Atlantic resumed some of its commercial flights, it has levelled up its cleaning procedures at check-in, boarding gates and on board. Cabins and toilets receive electrostatic spraying of high-grade disinfectant before each flight and customers are provided with a personal Health Pack, which contains three medical-grade face masks, plus surface wipes and hand gel. Lee Haslett, vice-



president of sales at Virgin Atlantic, says: "Where possible, customers will be given additional space."

Virgin Atlantic now offers a simplified hot food service across all cabins, designed to limit interaction between cabin crew and passengers. Economy and premium economy passengers are given a meal box with a choice of two hot dishes and drinks, while Upper Class customers can choose between three hot

meals, delivered to their seat on a tray.

Most recently, Virgin Atlantic won approval for a five-year business restructuring plan for a private-only solvent recapitalisation of the airline. This involves a refinancing package worth £1.2 billion over 18 months, and cost savings of £280 million per year. A dedicated £880 million will fund the rephasing and delivery of aircraft over the next five years.

"With the support of shareholders Virgin Group and Delta, new private investors and existing creditors, [the plan] paves the way for the airline to rebuild its balance sheet and return to profitability from 2022," says Haslett.

He adds: "By 2022, Virgin Atlantic will fly the same number of sectors as 2019 despite its smaller scale, demonstrating productivity and efficiency improvements. The airline will operate a streamlined

fleet of 37 twin-engine aircraft following the retirement of seven B747s and four A332s by the first quarter of 2022, with rescheduled delivery of outstanding A350s and A339s."

Looking to the future, Virgin Atlantic's slimline fleet will help it tackle its sustainability goals. In July, CEO Shai Weiss joined Prime Minister Boris Johnson for the UK's first ever Jet Zero Council meeting – a new partnership between leaders in aviation and sustainability, and the British government.

The Jet Zero Council's aim is to ensure the UK delivers net zero carbon emissions on commercial flights by 2050. "At Virgin Atlantic, we are well positioned to achieve this, with one of the industry's youngest and most fuel-efficient fleet of wide-body twin-engine aircraft," says Haslett.

BY ROSE DYKINS

CASE STUDY: SAFE SPACES BY UPFLEX

Upflex is the world's first flexible and sustainable coworking booking platform. Individuals or a team of employees can search through more than 5,000 workspaces across 1,600 cities in 70 countries, including individual desks, private offices and meeting rooms, and rent them for the day. Brands include WeWork, Knotel, Breather

and Servcorp. Every time a seat is booked via Upflex, the company plants a tree, and it has planted more than 10,000 to date.

In June, Upflex launched its Safe Spaces alliance in response to Covid-19. The aim was to highlight flexible workspaces that comply with strict health and safety guidelines, to mitigate the risk

for companies and employees wanting to return to an office environment after months of home working. Businesses can access a network of more than 1,300 approved, safe, flexible workspaces, viewable via Upflex's website or app.

"The virus has accelerated a change already in motion: a move to a flexible, distributed workforce," says Christophe Garnier, CEO and co-founder of Upflex. "Safe Spaces embraces these changes by allowing employees to keep flexible work arrangements, alleviate work-from-home constraints and easily find safe workspace close to home, so they can avoid public transport."

To earn a Safe Spaces stamp of approval, workspaces need to comply with the World Health Organization guidelines. Safe Spaces

also has its own health and safety criteria on top of this, which varies depending on the location of the venue. They include six-foot social distancing policies between desks, touch-free temperature screening and frequent disinfection of the office space.

Upflex membership costs US\$115 per team per month for renting an individual desk, or US\$299 per team per month for private offices. This equates to five day passes per month, which can be shared among an unlimited number of team members.

On top of this, companies can pay to hire meeting rooms from US\$15 per hour where available. And, for companies of a certain size with a global reach, Hub by Upflex grants members a large private HQ, with the rest of their international team renting other locations around

the Upflex network.

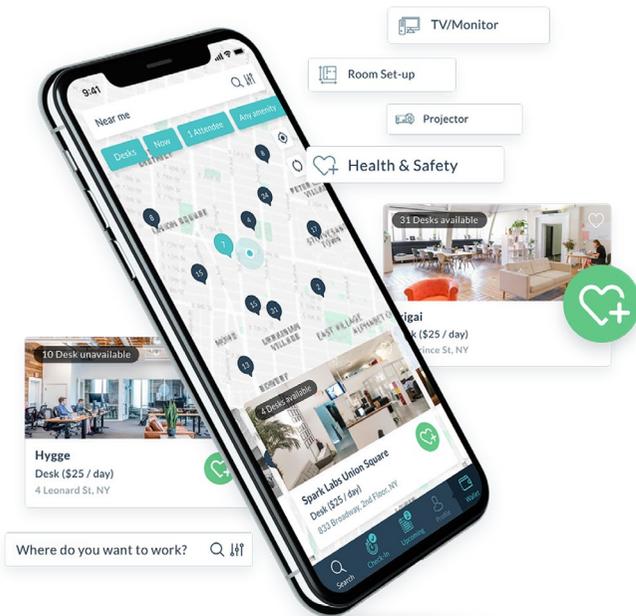
Upflex's Safe Spaces could restore business travellers' confidence in working on the road, while helping their company meet duty-of-care requirements. By renting office space around the world via a single platform – rather than working in cafés, paying for airport lounge access or renting hotel meeting rooms – users get a consolidated bill, which saves time when filing expenses. Upflex's sustainable ethos is also attractive to those looking to offset their business travel carbon footprint.

Covid-19 has reinforced the collective shift in how businesses approach leasing workspace. Over the coming years, commuting to a fixed, permanent workspace will seem inefficient and risky. With the knock-on effects of the pandemic, companies won't be certain how much office



space they will need in a year's time. Instead, a "hub-and-spoke" model will be more viable and cost-effective, in which some of a team operates at HQ, with other employees based at a coworking space near their home. Meanwhile, the team's frequent business travellers can access high-quality workspace wherever they are in the world, whenever they need it.

BY ROSE DYKINS



CASE STUDY: SINGAPORE FAST LANES

Like so many countries around the globe, Singapore's travel sector is trying to pull itself upright after a devastating 43% decline in arrivals in Q1 2020, which, at its lowest in April, numbered just 750. The outlook has become a little more optimistic, with figures showing that arrivals topped out at 2,200 in June, a number that will likely increase thanks to

the implementation of "fast lanes" with Brunei, China, Malaysia, New Zealand, Japan and South Korea.

The reciprocal "fast lane" with China allows travellers access to and from Singapore and six Chinese provinces and municipalities, namely Chongqing, Guangdong, Jiangsu, Shanghai, Tianjin and Zhejiang. Residents making essential business

trips between the two countries can move among these regions but must take a Covid-19 test within 48 hours of departure and present a negative certificate at their destination's point of entry.

A similar scheme between Singapore and Malaysia launched on August 10, allowing for cross-border business travel between the two

countries. To be eligible, business travellers entering Singapore must be sponsored by a Singapore-based company or government agency. They also need a Safe Travel Pass approval letter and to have taken a PCR test within 72 hours of departure showing a negative Covid-19 result.

Once in Singapore, visitors must submit and adhere to their itinerary, are required to use the state's TraceTogether app and are not allowed to use public transport (except for hire cars or taxis) during their stay. In Malaysia, travellers must download and use the MySejahtera contact tracing app.

Two iterations of the scheme have been rolled out: the Periodic Commuting Arrangement (PCA) for long-stay travellers, which requires travellers to remain in the destination country for at least 90 days before they can return home for

leave; and the Reciprocal Green Lane (RGL), which allows short-term business travellers access for up to 14 days. Permanent residents of either country will be eligible to use the PCA scheme providing they have a valid work visa.

Travellers using the RGL must take another Covid-19 test on arrival in both Singapore and Malaysia at their own expense, and must remain at their accommodation until results are released.

PCA travellers in Singapore are subject to a home surveillance order and are required to quarantine for seven days before taking another Covid-19 test, after which time they can begin working. The same PCA health protocols do not apply in Malaysia, however.

On August 21, restrictions were lifted for short-term visitors travelling from New Zealand to Singapore. Travellers can apply

for an Air Travel Pass for entry to Singapore, though Singapore citizens, permanent residents and long-term pass holders need not apply for the documentation. The arrangement is, however, unilateral, with New Zealand's borders remaining closed.

Singapore also has reciprocal fast lanes for essential business travel with Brunei, South Korea and Japan. Travellers must be sponsored by either a Singapore-based company or state agency in order to obtain a travel pass, which they must present alongside a valid visa, a negative Covid-19 test certificate and a return ticket.

Companies or government agencies must transport the traveller from the airport to their accommodation, where they must remain until they have obtained a second negative test for Covid-19.

BY MARISA CANNON



CASE STUDY: AMEX GBT TRAVEL VITALS

At a time when everything we thought we knew about travel is compromised, what the industry needs is the confidence to keep moving safely. Thanks to the launch of Travel Vitals from American Express Global Business Travel (Amex GBT), the world is one step closer to achieving this goal.

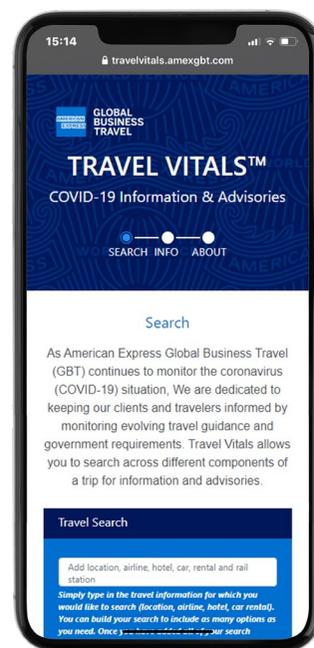
A dynamic travel briefing platform that provides a single source for all the information travellers need before, during and after a business trip, this tool shows travel restrictions for specific locations, while also identifying Covid-19 infection rate spikes and hot spots.

Product strategy director at Amex GBT Marilyn Markham is part of the team that brought Travel Vitals to life. She says: "Our team all had itchy feet to start travelling

again but in the current climate, gathering enough information and confidence to feel like plans were under control felt like a huge hurdle.

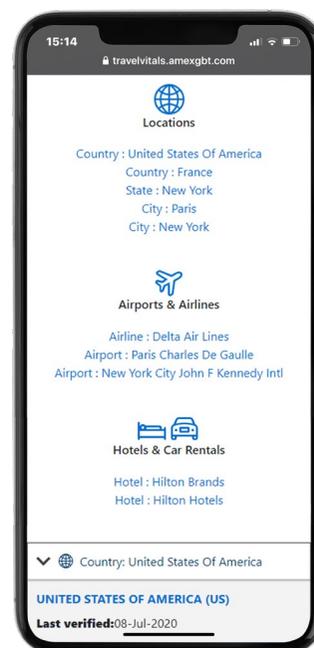
"We surveyed a panel of travellers and it turned out they shared our concerns. The industry was doing a really good job at explaining what they were doing to reassure and protect travellers, but finding the information was hard work – and nobody has time for hard work. We thought if we could provide this information as a service then it would be easier to ascertain the risk involved and travellers could decide for themselves whether it was worth it."

Travel Vitals aggregates data from hundreds of sources, enabling users to search travel guidelines by destination, airline, airport, hotel chain, train operator and ground



transportation provider. The journey assistant is free and available to all travel managers, travel management companies and travellers.

For Amex GBT clients and travellers, the platform powers itinerary-specific information in digital channels, including the Amex GBT mobile app, chat and online booking tools. Markham has



already put Travel Vitals to work on a vacation from her home in Newark, New Jersey.

"I booked a trip to see family in Richmond, Virginia, with two extra days either side for some personal admin appointments," she says. "After entering my itinerary into Travel Vitals, I found out that Virginia is actually on the 'watch out list' for New Jersey,

so on my return I would have to quarantine.

"With this information I was prompted to reschedule my appointments. I also learnt that Newark airport was no longer allowing rideshares, so I headed straight over to the taxi rank, saving myself the headache of going to the wrong place. I even double-checked whether I was expected to wear a mask at the airport or on the plane. Travel Vitals told me United Airlines was offering masks in-flight so I didn't take as many [of my own] as usual."

One of Markham's favourite features of the Travel Vitals service is the search function. The results encompass answers to questions one might not have even thought of asking, going above and beyond to deliver a package of truly comprehensive information.

"Enter your departure airport and arrival airport, the airline you plan to fly, or perhaps the ground transportation or hotel you want, and Travel Vitals comes back with all of that plus advice for your departure and arrival country, including city- or state-level information," says Markham.

Traveller and supplier feedback has been fantastic, with many people passing the service on to friends and family through word of mouth. "It's been really rewarding to see Travel Vitals in action," says Markham. "Although we're very much a business travel company, with Travel Vitals we are able to support all travellers for the foreseeable future and help get our industry moving again."

BY OLIVIA PALAMOUNTAIN



Andrew Crawley, chief commercial officer for American Express Global Business Travel (Amex GBT)

How has Covid-19 affected business travel management?

If we have learnt anything from the past six months, it's that the world suffers when people's movement is restricted. The health of individuals, economies and societies is hindered to varying degrees. However, the value of managed business travel has never been more evident.

In March, as the world locked down, thousands of our highly skilled travel counsellors around the world worked around the clock repatriating more than 35,000 travellers and processing more than 100,000 air fare refunds.

In addition, the inability to travel freely has reinforced the value of meeting in person. Video-conferencing has been very useful, but we have all been operating in a diminished state.

Many of our clients have talked about how video technology has helped them "get by" – but serious companies and organisations don't want to just "get by".

To build a positive culture, to develop bonds and relationships, to cultivate creativity and inspire people, we need to meet face-to-face. Travel is also the engine room of the global economy. We therefore need to get the world moving again in the safest, most efficient way possible if we are to protect jobs and grow economies.

How has Amex GBT adapted to the crisis and changed the way it works with clients?

The lockdown period was intense. Our travel counsellors and client management teams mobilised around the world, and were working

evenings and weekends getting people home to their loved ones. Since then, we have been working with clients in various ways.

Travel managers need data, insights and analysis to make well-informed, thoughtful decisions about creating travel policies fit for the current environment. In the past, travel policies – the rules that govern how employees undertake business travel – were reviewed once, or maybe twice a year. In this new era, they may require review and amendment on a much more regular basis given the constant easing and tightening of travel restrictions in countries and cities around the world.

We help travel managers implement new approval processes to make sure travellers get the right permission to travel before they book.

In this era of uncertainty, and in the absence of reliable forecasting data, negotiating with airlines, hotels and ground transportation companies is hard. We are therefore helping bring clients and suppliers together to create mutually beneficial pricing for the future.

How is Amex GBT restoring confidence to business travellers?

People need good information to feel confident in their decisions and choices – so for us, effectively communicating the most relevant, up-to-date information is key.

There's a vast amount of data out there – from government advisories and travel restrictions, to airline, airport, hotel, rail and ground transport biosafety standards and protocols. But it's highly fragmented, so we have aggregated this data

into a single source, delivered to travellers' mobile devices in timely, itinerary-specific updates.

Travellers also want a consistent experience, whether it's in airports, on aircraft or in hotels. We have therefore worked with governments and industry associations, such as IATA and the World Travel and Tourism Council (WTTC), to influence the implementation of consistent processes in all areas of travel.

What are the greatest challenges to business travel over the next year?

Until a vaccine is widely available, we're in an era of potentially constant change. Governments and authorities can revise guidelines on a daily basis.

Travel plays a vital role in economic recovery, and we are talking to

government ministers and leaders about how policies could better support travel.

As well as these direct conversations, we are collaborating with industry partners – for example, along with another 100 industry leaders, we co-signed letters from the WTTC to the G7 heads of state, opposition leaders and the European Commission president, recommending more joined-up policies that can enable economies to reopen.

How important will sustainability be for business travel going forward?

Our clients say sustainability remains a priority for their travel programmes. We recently launched a new feature in our online booking platform that allows travellers to filter search results by level of CO2



emissions. It enables the booker to make well-informed choices when selecting rail and air options for their trip.

Last year, we were the first global travel management company to offset 100% of staff travel CO2 emissions.

Sustainability is also a priority for meetings and events, and we help clients source eco-conscious venues, reduce waste, choose low-mileage, sustainable food options, and bring community engagement into their programmes.

Investing in digital technology has been a key strategy for us to create more sustainable, efficient solutions – now with the current restrictions, hybrid meetings technology means smaller physical gatherings can be joined

by virtual attendees around the world.

How will working from home change the way people travel for business?

The rise of home-working is leading more companies to examine their real-

estate strategy. With a more dispersed workforce, you reduce commuting and office costs, but colleagues still need to meet face-to-face, potentially increasing the need for business travel.

Long before the current situation, people predicted the rise of virtual collaboration tools would result in business travel decline – just as people before them said the same about video-conferences, emails and fax. Once again, it hasn't happened. These online tools have made it easier to work together on new ideas and projects with virtual teams around the world.

In fact, this technology fosters more human interaction: those virtual teams inevitably need to meet at some point, to build relationships and take their ideas to the next level. Creating new projects creates the need to travel.

EXPERT PREDICTIONS



Riskline:
Kennet Nordlien, founder and CEO

"The global pandemic has shone a spotlight on the environmental impact of travel, prompting many companies to look at their own carbon footprint. The future of business travel is likely to be greener, with funding in new green technologies already under way. Travel has now become more complex and we'll see more trip approval and compliances built into the booking process.

"I believe it will be three years before business travel returns in a substantial way, but it will never reach pre-pandemic levels and the MICE [meetings, incentives, conferences and exhibitions] industry

will suffer. Conversely, duty-of-care providers and travel managers are now in high demand as people want an individual to help them navigate the new restrictions, rather than rely on a self-booking tool.

"I estimate around 20% of business travel will disappear altogether due to the growth of online meetings and new, stricter travel policies. Companies have been forced to re-evaluate travellers' needs, and place more emphasis on duty of care and enhanced focus on sustainability going forward.

"We've seen an increased focus on granular or localised data – risk intelligence pertaining to what is happening in someone's immediate vicinity. There has also been an uptick in requests for destination information based on travellers' country or state of origin."



Lyft: Caitlin Gomez, head of corporate travel partnerships

"As we begin to navigate our new normal, we're excited about the opportunity to innovate. Business travel partners will have to push harder than ever to make the entire travel experience easier and more valuable.

"Safety and security will be at the forefront, and platforms and tools that provide peace of mind and enhanced user experience, with a focus on personalisation and partnership, will win the recovery.

"Access to public transport alternatives is going to be critical. Companies will need to stay informed of where their travellers

are before, during and after their business trips or commutes. The advantage of rideshare is the visibility and transparency it brings. Lyft Pass allows businesses to create custom ride programmes and control cost, ride type, pick-up/drop-off location and time of day.

"Additionally, our Health Safety Program includes new requirements to protect riders and drivers. Business travellers may be wary of venturing far from home, so safe and reliable ground transport and locally accessible travel will be critical.

"This is where Lyft has the opportunity to shine, with multiple modes that serve multiple uses. Our platform collates all transportation needs into one place, from bikes and scooters to public transit, car rentals and classic rideshare."



IATA: Andrew Stevens, assistant director, corporate communications

"Imagine a seamless, contactless travel experience. You have checked yourself and your luggage in at home, dropped your bags off at a self-service kiosk and completed immigration and security with minimum fuss and virtually no contact with airport officials. All that remains is to move from the lounge to your airline seat.

"This scenario has long been a distant vision for the airlines. But the impact of Covid-19 is bringing that vision a big step closer to reality. For trusted, premium travellers in particular, the silver lining to this devastating pandemic may well mean

a more streamlined and pleasant travel experience in the not-too-distant future. IATA's recent global passenger survey was clear – 84 per cent of travellers say they feel safer with contactless procedures. Our industry is listening.

"We have created a blueprint (ICAO Council's Aviation Recovery Task Force Take-Off Guidance for Air Travel through the Covid-19 Public Health Crisis) for restarting aviation, which outlines a clear path ahead – contactless processes and technology including biometrics such as facial or iris recognition. It can be used at self-service bag drops, boarding gates and retail outlets. IATA already has its One ID initiative where passengers will eventually move from curb to gate using a single biometric travel token. Sound futuristic? It is, but Covid-19 is bringing that future closer."

EXPERT PREDICTIONS



**Black Box Partnerships:
Raj Sachdave,
managing partner**

"Travel demand will always exist, however the threshold for physical movement has changed forever, with a forecasted 20% to 40% downturn for some sectors as remote working becomes more established. As we look to rebound the economy, travelling for business development will be at an all-time high, but low-level trips will tank out.

"Managed, specialist services to support business environments will continue to add value and grow in tandem with technology to offer seamless and connected trips with personalised information. Hopefully, this will see some local economic benefit.

"Technology will also add a new dimension; our health vitals will show how fit we are to travel and we will see the use of smart wearable devices that share information.

"I can see more consolidation at the top and mid level, with some businesses disposing of non-essential travel divisions. Meanwhile, SMEs looking to tap into larger business networks will mean the SME (local market) sector will be a champion (by volume) when it comes to travel.

How suppliers act commercially is going to drive new behaviours that will affect travel budgets and service propositions – there's now an evident cost line around increased hygiene.

"Overall, it's going to take a few good years to get into a new rhythm for travel, but the threshold is at an all-time high, regardless of length or cost."



**The PC Agency: Paul
Charles, founder and
CEO**

"If we are to learn to live with Covid-19 then we have to be creative in our approach to business travel. Starting with a clean sheet is a refreshing and exciting challenge.

"Businesses should start by being more sustainable – adopting a long-haul face-to-face approach and a short-haul digital-first policy. Meetings that might have previously required a short flight can be done initially on Zoom, for example, but then followed up with a face-to-face meeting if needed, such as for contract-signing or a site inspection.

"Firms should budget for regular testing of their staff who need to

travel, with swab and saliva testing carried out in offices. A plethora of companies are now emerging that are experts in this area. These measures could be linked to greater testing at airports, with frequent flyers prioritised for quick results in arrivals in a Nightingale-style medical facility at major hub airports such as Heathrow.

"Business facilities could also be expanded further at airports, meaning that meetings could be held more often just after touchdown, rather than us having to travel into a city and potentially spread the virus to more people.

"All of these would remove the need for damaging quarantine measures, which stifle demand and reduce productivity due to employees, and bosses, not being able to work or go to an office or meeting."



**ACI World: Luis Felipe
de Oliveira, director
general**

"Although the global lockdown has prompted businesses to be creative, it has also shown that there is no substitute for face-to-face meetings and communication – so a safe, secure and hygienic travel experience will be a top priority. We can expect to see more touchless processing and more processes completed remotely.

"Greater use of mobile and automated solutions and AI, including touchless self-service and biometrics, will be implemented, alongside greater use of data, such as health information, to enable travel to continue to be seamless and safe.

"Check in and bag

drop may move largely off airport, to hotels and conference centres, and services will more commonly include bag pick-up and delivery.

We will also see greater integration with other transit systems. Companies that have found they can conduct operations efficiently on a remote basis will look at the cost of business travel in a new light.

"Many conferences are now being held digitally as longer events that are broken down into manageable virtual chunks. In the longer term, we anticipate a return to 'business as usual', possibly as hybrid models with combined virtual and physical events, or hub-and-spoke type arrangements with smaller events being held in satellite locations. However, the days of the handshake might just have to become a thing of the past."

EXPERT PREDICTIONS



**Quest Apartment
Hotels: Anthea
Dimitrakopoulos,
general manager sales**

"Business travellers will make the decision to travel to locations based on perceived safety. The regulations of state governments and the ability to contain and manage outbreaks will determine whether business travel resumes in certain locations.

"Due to perceived health risks, business travellers are likely to prioritise shorter travel and/or same-day travel. Due to budget restrictions, business travel buyers will, out of necessity, deal directly with their suppliers to procure travel programme requirements.

"Health and safety will be the key driver and influence over where and when business travel will resume, with domestic and regional trips the first to rebound ahead of any international travel due to the complexity of the different government regulations, mandatory quarantine requirements and the risk of fast-changing policies. Business travel for major industry conferences and trade events will likely be the last to return due to the public safety issues arising from large groups.

"Quest Apartment Hotels' Stay Safe Promise exceeds the health and safety standards mandated by the World Health Organization and the Australian government. Our properties are a home away from home and more relevant than ever as business travellers seek privacy to curate their business stay, their way."



**Hilton: John Giacalone,
vice-president of global
safety and security**

"Hilton is in the business of people serving people. We believe the desire to travel, experience new cultures and connect with others is core to the human experience, and are confident that people – including business travellers – will return when it is safe to do so.

"During the pandemic, Hilton has worked diligently to enhance hygiene and cleanliness protocols to meet our customers' changing travel needs.

"The launch of Hilton CleanStay in collaboration with RB, maker of Lysol and Dettol, builds upon the already high standards of housekeeping and

hygiene at Hilton's more than 6,200 properties worldwide, where hospital-grade cleaning products and upgraded protocols are currently in use.

"Additionally, to support new considerations for in-person meetings, we introduced EventReady with CleanStay to address safe group travel practices and evolve the event experience by providing booking flexibility and safe, socially responsible solutions.

"The award-winning Hilton Honors App can be used as a replacement for some of the physical interactions that were once required on property. Guests can now use the app to check in and choose their room, unlock their guestroom door, message hotel staff and check out of their room, if they so choose."



**World Travel & Tourism
Council: Virginia
Messina, managing
director**

"Business travel is crucial to the travel ecosystem and WTTC is doing its best to ensure governments around the world support the sector, which is crucial to helping drive economic recovery post Covid-19. The focus on securing a healthy and hygienic travel environment for business – and leisure – travellers will become a priority. Innovation will also be part of the future, with technologies playing a bigger role in reducing face-to-face contact, as well as a bigger emphasis on sustainability and inclusion.

"Employees have

become used to working remotely, however there are things that technology can't replace, such as team-building, trust and many of the personal experiences that come with face-to-face contact and that are crucial for successful business travel. WTTC has been working hard to rebuild consumer confidence to travel, through the establishment of its Safe Travels protocols.

"We know the MICE sector is beginning to recover, particularly in countries like China, where businesses have taken the necessary precautions and are beginning to conduct meetings or events. This is great news and proves that we need to learn to live with the virus while we enable the economy to recover.

"We are hopeful that business travel will be back during 2021."

EXPERT PREDICTIONS



**Enterprise Europe:
George O'Connor, vice
president of sales and
business development**

"Enterprise Holdings has been able to weather the Covid-19 storm and support those who still needed to travel during this time, including as an essential service provider to key and emergency services during the crisis.

"At Enterprise Rent-A-Car and National Car Rental we introduced kerbside pick-up and delivery options, and a Complete Clean Pledge, which goes above and beyond our already rigorous cleaning protocols.

"The way everyone approaches business travel has changed and will continue to change. The crisis prompted

us to accelerate many of the innovations we already had in the pipeline, such as a trial of a low-touch rental process and an eventual no-touch rental experience. We believe that the explosion of home-working during the crisis is likely to have a lasting impact on society.

"Planning business journeys will change, and people will want access to a reliable and convenient form of transport that enables them to control the environment in which they are travelling.

"We have now added to our network with our Car Club offering, which provides a range of fuel-efficient vehicles that can be rented by the hour or the day, 24/7. The vehicles are available at a range of convenient street, train station, car park and Enterprise rental office locations."



**Business Traveller
magazine: Tom Otley,
editorial director**

"The statistics and surveys, while essential to any decision-making, take us only so far in determining when – and in what numbers – travellers will return to their former ways. Just as determinative is the motivation within many of us to leave the house to meet others for business, for pleasure, and because somehow it is hardwired into our DNA.

"In recent years, right up until the lockdowns were implemented across Europe, *Business Traveller* ran popular reader events, from evening drinks to lunches and large-scale wine-tastings. The venues were a draw, and so was the

food and drink, but the reason people attended, sometimes adjusting their business trips to be in town that night, was so they could meet fellow travellers.

"They all wanted to swap information and stories about their favourite restaurants, bars, airlines and hotels. What did those who had tried the new British Airways Club World Suite think of it? How did it compare with the Virgin Upper Class Suite? As host of many of these events, I couldn't help reflecting that while, on the surface, this was all about the mutual exchange of useful – and possibly money-saving – information, it was also meeting a deeper need.

"We created the events because we believed that the more dominant social media becomes, the more people crave personal interaction. It's a cruel irony that Covid-19

has made this impossible in the short term, but the desire is still there. The question is not when travel will return, but how big and in what form the bounceback will be.

"In recent weeks, while observing all the protocols, I have been returning to business travel, at airports, on flights, in hotels, in various cities and even on a UN World Tourism Organization trip to the Canary Islands, and I can testify that we all felt real pleasure in connecting once again.

"It is these impulses, once they are released (and once we are released) that will power the revival of business travel. It will be different, of course, but travellers can put up with a lot of inconvenience as shown by the security checks we have all endured for the past two decades. There is a lot to look forward to."



**WWStay Inc: Rajeev
Goswami, CEO and co-
founder**

"I anticipate business travel will shift towards more relationship building rather than just transactional meetings, which will be replaced with virtual technologies. Working from home could have new variation – working from a different location to provide variety and break the monotony for employees.

"I also foresee the average stay duration going up as there will be less transient travel and more project travel. At WWStay we are looking to provide better quality internet and food delivery. Overall it will take 18 to 24 months for business travel to recover."

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