



Key Findings from a survey of
corporate travel managers in North
America and Europe

Innovation and the Perfect Business Trip:

AI, TMC Innovation, and
Hotel Distribution



AI

in Managed Corporate Travel:

Transformative Potential,
Limited Impact

AI makes slow inroads in managed corporate travel.

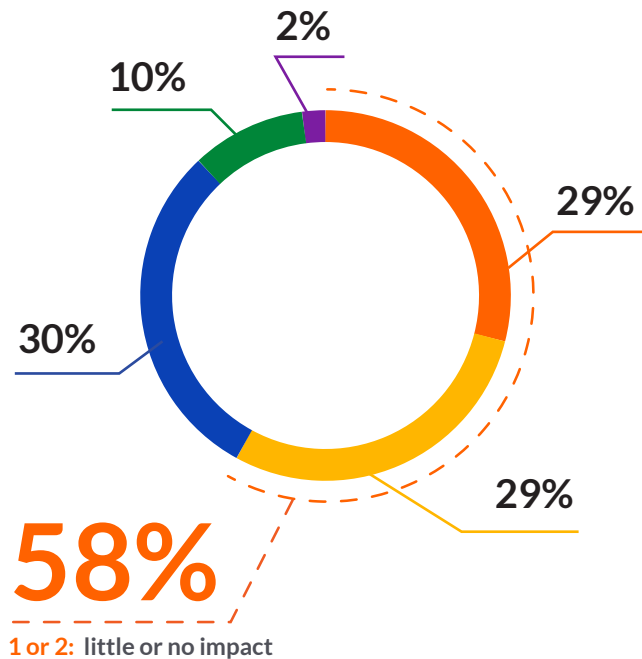
This is because of emerging capabilities and not lack of interest.

Travel buyers are comfortable with AI, and interested in various use cases.



01

So far, AI fails to transform managed travel programs



- 1 No impact on our program
 ○ 2
 ○ 3
○ 4
 ○ 5 Dramatically improved our program

Q. How would you assess the extent to which AI has impacted your travel program so far? (n=218)

02

Yet, travel buyers are widely interested in AI use cases

Top 5 (% interested)



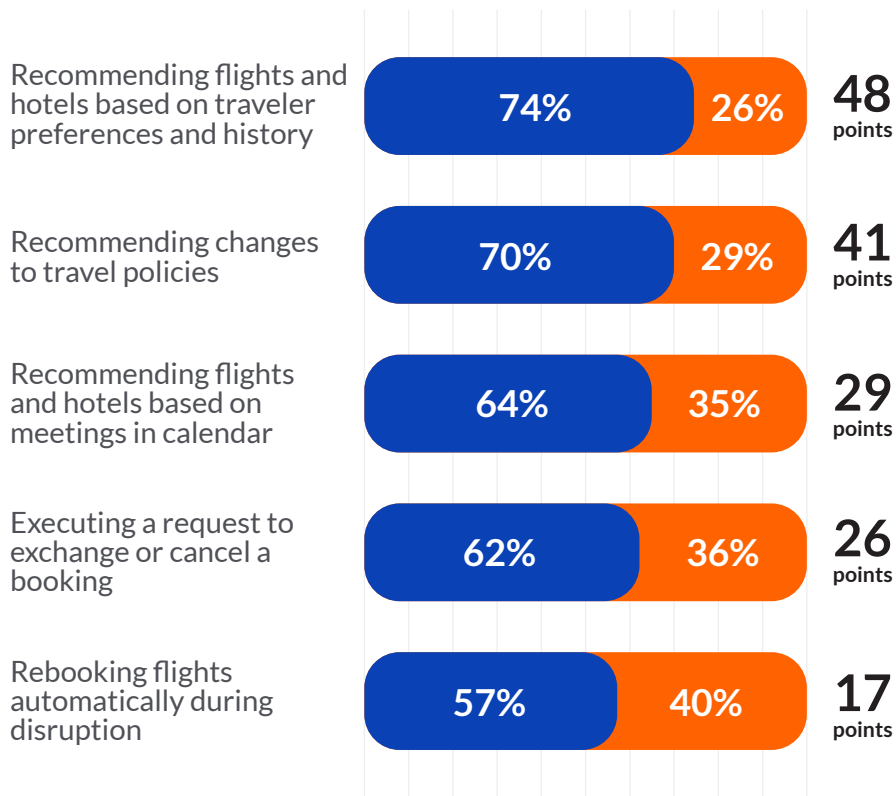
Q. Thinking about your travel program, please rate your interest in adoption the following AI features or capabilities over the next 12-18 months? (n=218)

03 AI comfort outweighs discomfort

● % comfortable

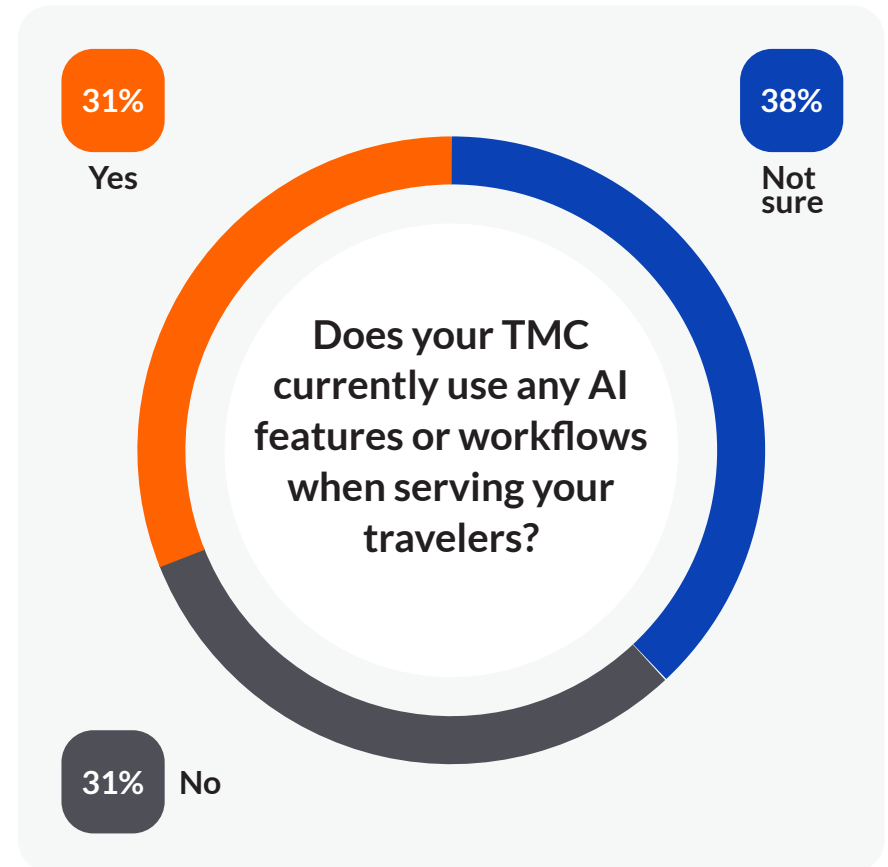
● % uncomfortable

Comfort -
discomfort



Q. How comfortable are you with the thought of AI making the following decisions? (n=208-210)

04 Many buyers are unaware of their TMC's AI capabilities when serving travelers



Q. Does your TMC currently use any AI features or workflows when serving your travelers? (n=208)

TMCs:

Fragmented Service and Technology in a Global World

85% of buyers say their program is global or multinational.

While travel programs are global, travel companies too often are not. TMCs typically have a larger presence in some regions than others.

Even when they operate globally, they often depend on joint venture partners or partially-owned subsidiaries in other countries or regions.

Global travel programs struggle with siloed data and fragmented technology and service.

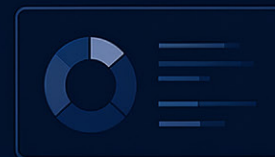
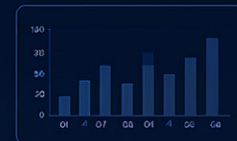
TMC
North America

TMC
Latin America

TMC
Europe

TMC
Asia Pacific

TMC
Middle East & Africa



05 Technology and servicing are about equally important when selecting a TMC

We asked Travel Buyers to numerically rate the importance of tech vs. servicing capabilities if they were to choose a new TMC.

They were given 100 percentage points to allocate between the two.

46%

Average weight given to servicing

54%

Average weight given to tech

Q. If you were to choose a new TMC, what weight would you give to technology vs. servicing capabilities in your evaluation? Please enter a number. Total must add to 100%. (n=201)

06 Self-service is the “norm” – but assisted bookings are an important part of the mix

61%

Average percentage of “self-service” bookings made by employees themselves through OBT/TMC

31%

Average percentage of “assisted” bookings made with a travel agent

8%

Average percentage of “other” bookings



19%

of travel programs are “high-adoption” (90%+ self-service)

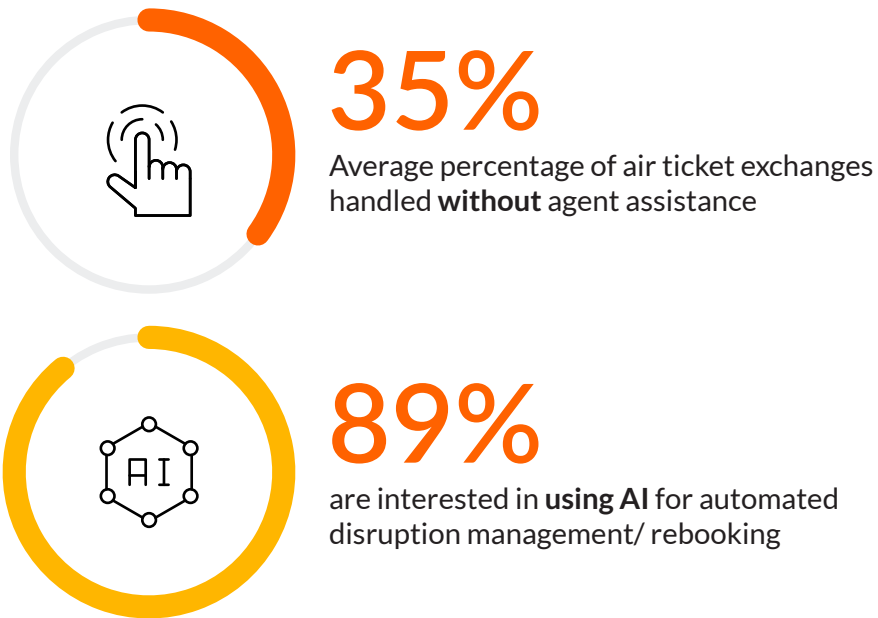


17%

are “high-touch” (50%+ assisted)

Q. Thinking about the “managed” bookings made through your travel program, what percentage are...? (n=203)

07 Air exchanges remain manual – but AI has the potential to help



Q. What percentage of air ticket exchanges are handled via self-service without agent assistance? (n=141).

Q. Thinking about your travel program, please rate your interest in adoption the following AI features or capabilities over the next 12-18 months (n=219-220).

08 Managing global travel remains a challenge

61% say managing a global program is a major/moderate challenge

Top 3 challenges among those who indicated it is a challenge

Lack of consolidated reporting across regions

63%

Inconsistent traveler support quality across regions

60%

Multiple TMC relationships to manage

52%

Q. How significant a challenge is managing your travel program across different regions with different tools, policies, or TMCs? **Note: Question only displayed to managers of global programs.** (n=156).

Q. You mentioned that managing travel across different regions is a challenge. What makes it a challenge? Please select all that apply. **Note: Only displayed to those who indicated managing travel globally is a challenge** (n=95).

09 Global travel programs struggle with siloed data...



12%

Only 12% of global companies have a consolidated view of the travel program from a **single data source**

10 ...and fragmented tech

Only 68% of buyers say data from their OBT flows into a centralized analytics platform

68%

Only 32% say data from their TRM tool flows into a central platform

32%

Only 26% say data from their third-party benchmarking tool(s) flows into a central platform.

26%

Q. Does your company incorporate the following data sources into a centralized analytics and reporting environment? Please select all that apply.

Note: Recode conducted to only show respondents who use the specified tool at their company (n=35-186)

Q. Does your company incorporate the following data sources into a centralized analytics and reporting environment? Please select all that apply.

Note: Recode conducted to only show respondents who use the specified tool at their company (n=35-186)

New Models of Hotel Retailing

For the last decade, a lot of attention has been paid to New Distribution Capability (NDC). This is a “technological standard” that is transforming how airlines “distribute” (i.e., sell) their products through third-party channels including corporate TMCs and OBTs.

Yet, hotel retailing is also ripe for disruption. A key goal of this study was to examine the potential implications of new models of hotel retailing for corporate buyers.



11

New retailing models might enable employees to purchase “add-ons” or amenities through the OBT/TMC booking path...



Breakfast
(if not included in rate)

85%

interested including **21%** who are only interested if employee can pay out of pocket (“split pay”)



Early check-in

85%

Interested including **23%** only interested if “split pay”



Parking

83%

Interested including **17%** only interested if “split pay”



Late check-out

83%

Interested including **25%** only interested if “split pay”

12

... and allow “attribute-based retailing”...

Attribute-based retailing

Employees might be able to select a particular room through the booking flow.

For instance, they might choose a room on a higher floor for safety reasons – or a room with a view. Today, these requests are often made manually after booking.



of buyers say this would improve the self-service booking experience

Q. Please rate your interest in having the following hotel amenities available for purchase through the OBT/OBE at the time of booking (n=187-203).

Q. Which new features are most desired for improving traveler self-service experiences for hotel bookings? **Please select all that apply** (n=204).

13

The average self-reported “leakage” rate is 32%

On average, buyers estimate

32%

of their company’s hotel bookings are made outside of “managed” channels (i.e., TMC or OBT)



14

What would reduce leakage the most?



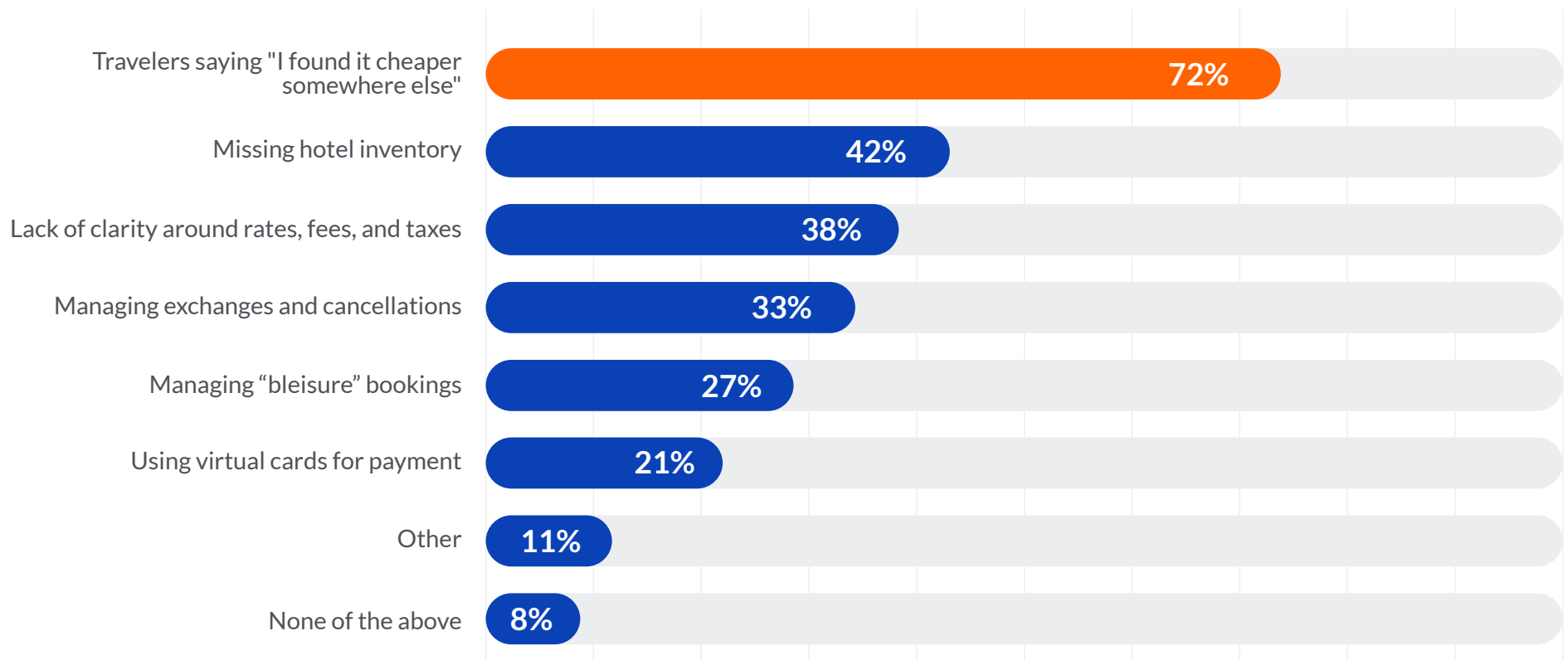
Q. What percentage of hotel bookings do you estimate occurs outside your company’s online booking tool or TMC resulting in leakage? (n=178)

Q. Thinking about your travel program, which tactics would move the needle the most for reducing hotel leakage? Please select all that apply. (n=184)

15

“I found it cheaper somewhere else” is the biggest hotel booking pain point by far

Corporate hotel booking pain points



Q. What are the biggest pain points for self-service hotel bookings? Please select all that apply. (n=209)

Methodology:

- GBTA conducted a survey of travel buyers in North America and Europe
- We collected data from March 10-March 23, 2026
- 269 travel managers responded, with 187 completing the full survey
- Of the respondents, 118 were in North America and 69 were in Europe

