Booking Behaviour II

A Survey of Business Travellers in Germany, the United Kingdom, and France

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INTRODUCTION

Last year, the GBTA Foundation conducted a study about booking behaviour and preferences.[1] The study was based on a survey of 741 business travellers in Europe's three largest business travel markets: Germany, the United Kingdom, and France. The survey focused on several key questions including the types of booking channels business travellers use; their reasons for using different channels; and their preferred channels.

This year, the GBTA Foundation set out to examine this topic in greater depth, conducting another survey of business travellers in the same three markets. While some of the questions are the same from the previous study in order to make comparisons, this survey also asked several additional questions including:

1) Are business travellers satisfied with their company-provided online booking tool (OBT)?

2) Why do business travellers use their OBT?

3) Which booking channels will business travellers use more often in the near future? Which will they use less often?

4) Are booking policies more lenient for hotel reservations than they are for air reservations?

5) How often have business travellers booked on a mobile device? Will they do so more or less often in the near future?

6) How often do business travellers book sharing services on work trips? Do they expect to do so more or less often in the near future?

KEY FINDINGS

- **A majority of business travellers use a corporate online booking tool when they have access to one.** In each of the three countries, roughly three out of five business travellers who had OBT access used one to book a work trip in the past year, similar to the rate obtained in last year's survey.

- **Yet a substantial share of these same travellers also use alternative channels.** In the past year, even when they had OBT access, at least one-third of business travellers in each country booked directly with a supplier, and at least one-quarter used an online travel agency (OTA) or site. Of those who booked directly with a supplier—despite having OBT access—roughly half or more make direct bookings for work trips "in many cases" or "always". The share who booked directly with a supplier is roughly in line with last year's survey. However, this year's survey found higher rates of OTA use, though it is unclear whether this reflects an actual increase or the unique profile of this year's survey respondents.

- **When thinking about why they use an OBT, business travellers most commonly indicate a desire to conform to company policies or preferences.** The most commonly indicated reasons are *I am required or strongly encouraged to use it* and *I know I'm following travel policy*

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[1] GBTA Foundation, *Booking Behavior--The Business Traveller's Perspective: A Survey of Business Travellers in the United Kingdom, Germany, and France* (Alexandria, VA: GBTA Foundation, 2016).

when I book through the OBT. They less commonly indicate *it is easy to use*, *my travel plans are automatically shared with my organisation*, and I get better rates for air travel or lodging.

- **Business travellers are generally "satisfied"—but not "very satisfied" —with the online booking tool they have used in the past year.** In each of the three countries, at least seven out of 10 travellers who used an OBT in the past year are "satisfied" or "very satisfied" with their tool. However, the share who is "very satisfied" is under one-quarter in each country.

- **Many companies have different policies for air and hotel bookings.** In each of the three countries, a majority of business travellers who used an OBT in the past year are always required to use one to book flights, while a much smaller share—under half in Germany and France—are always required to use one to book hotels.

- **Direct booking could grow in the near future.** In each of the three countries, roughly one-fourth to one-third of business travellers who made a direct booking in the past year expect to do so more often in the next year. A smaller share—generally under one-fifth—expect do so less often.

- **A majority of business travellers booked at least one work trip on a mobile device in the past year.** They commonly used a mobile device to book hotel stays, rail tickets, and air tickets. Moreover, a decent share expect to book on a mobile device more often in the next year.

- **Despite the rapid growth of sharing services, at least two-thirds of business travellers in each of the three countries "rarely" or "never" use them on work trips.** However, Millennials use sharing services at a much higher rate than older business travellers, suggesting that business travellers could be much more likely to use sharing services in the future, as older travellers exit the workforce.

METHODOLOGY

An online survey was conducted of business travellers in the United Kingdom, Germany, and France. The survey was conducted by the GBTA Foundation using a business traveller panel. Fielding took place from October 12, 2016, to October 19, 2016.

Respondents qualified if they were employed (full-time or part-time), worked for a company that "required (them) to follow (its) published and enforced travel policies" or "encouraged (them) to follow general guidelines" for travel, and had traveled at least twice for business in the past year.

Seven hundred and twelve business travellers completed the survey. Quotas were set for age and gender within each country to obtain a sufficient number of respondents from each demographic and to mirror the business traveller population, thereby allowing comparison between groups. However, after sampling, a few groups remained underrepresented. As a result, the data was weighted to roughly approximate the desired distribution within each country. All percentages and sample sizes reported throughout are weighted.

The table on p. 23 shows the weighted age and gender distribution of respondents.

Results were tested for significant differences between comparison groups at the 95% confidence level. When found, the significantly higher result is marked with the letter that corresponds to the significantly lower result. Comparison groups include:

- **Country:** Germany, United Kingdom, France
- **Age:** 18 to 34; 35 to 54; 55 or older
- **Number of business trips in the past year:** two to five; six to 11; 12 or more;
- **Number of employees at company:** Less than 1,000; 1,000 to less than 3,000; 3,000 or more;
- **Travel policy:** Mandated policy ("I am required to follow my company's published and enforced travel policy"); Guidelines ("I am encouraged to follow general guidelines").

Throughout the report, results are sometimes filtered to focus on two specific subgroups: (1) business travellers who had access to a corporate online booking tool (OBT) in the past year and (2) business travellers who used an OBT at least once in the past year.

Readers should exercise caution when interpreting direct comparisons between countries, as a result of some differences between them. For instance, 46% of France-based business travellers work for larger organisations (more than 1,000 employees), compared to 35% of Germany-based travellers and 33% of U.K.-based travellers.

In addition, readers should exercise caution when comparing this year's results to last year's results. The study did not use a longitudinal panel – and therefore polled a different sample of respondents each year.

BOOKING CHANNEL USE AND SATISFACTION

Which booking channels do business travellers use?

A majority of business travellers use a corporate online booking tool when they have access to one. In each of the three countries, roughly three out of five business travellers who had OBT access used one to book a work trip in the past year, similar to the rate obtained in last year's survey. Yet these same travellers also use alternative channels. In the past year, at least one-third in each country booked directly with a supplier, and at least one-quarter used an online travel agency or site, despite having OBT access. The share who booked directly with a supplier is roughly in line with last year's survey. However, this year's survey found higher rates of OTA use, though it is unclear whether this reflects an actual increase or the unique profile of this year's survey respondents.

There are several group differences when it comes to OBT use (see next page). Millennials are least likely to use an OBT when they have access to one. This could mean they have a strong preference for vendor choice or the "consumer experience", or are less familiar with OBTs as a result of limited travel experience. Surprisingly, high frequency travellers *do not* use an OBT at a much higher rate than low frequency travellers. This suggests that greater exposure to company booking policies may not always lead to higher OBT use. In addition, while last year's study found that employees who are required to follow a mandated travel policy were much more likely to use an OBT, compared to those who follow general guidelines, this year's survey found only a modest difference. This could mean that even when companies have a mandated policy in place they experience considerable booking non-compliance or commonly allow policy exceptions.

Methods Used to Book Business Trips in the Past Year

All business travellers   **Had option to use an OBT**

Directly with an airline, hotel or car-for-hire company

	All business travellers	Had option to use an OBT
Germany	39%	32%
United Kingdom	45%	39%
France	46%	42%

Corporate online booking tool provided by my organisation

	All business travellers	Had option to use an OBT
Germany	39%	57%
United Kingdom	38%	59%
France	49% BC	60%

Calling or emailing a travel manager/travel agent

	All business travellers	Had option to use an OBT
Germany	33%	29%
United Kingdom	27%	29%
France	25%	28%

Someone else (not a full-time travel manager/specialist) booking for me

	All business travellers	Had option to use an OBT
Germany	29%	25%
United Kingdom	43% BD	33%
France	31%	30%

Online travel agency (OTA) or travel site

	All business travellers	Had option to use an OBT
Germany	28%	29%
United Kingdom	33% D	39%
France	24%	29%

■ Germany (n=226) B   ■ Germany (n=133) E
■ United Kingdom (n=231) C   ■ United Kingdom (n=126) F
■ France (n=237) D   ■ France (n=156) G
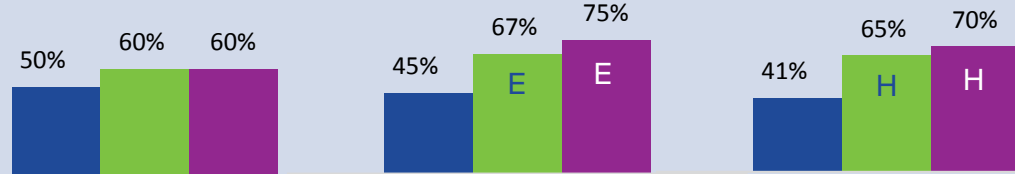
Q. In the past 12 months, which of the following specific methods have you used to book your business travel? Please select all that apply.

Use of Corporate Online Booking Tool in the Past Year
-amongst business travellers who had the option to use an OBT

By age group

Germany
- 50%
- 60%
- 60%

■ 18 to 34 (n=45) B
■ 35 to 54 (n=60) C
■ 55 or older (n=28)* D

United Kingdom
- 45%
- 67% E
- 75% E

■ 18 to 34 (n=50) E
■ 35 to 54 (n=54) F
■ 55 or older (n=22)* G

France
- 41%
- 65% H
- 70% H

■ 18 to 34 (n=41) H
■ 35 to 54 (n=81) I
■ 55 or older (n=34) J

By # of business trips in the past year
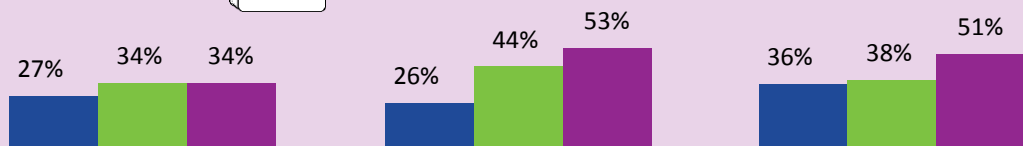
Germany
- 57%
- 59%
- 54%

■ 2 to 5 (n=41) B
■ 6 to 11 (n=44) C
■ 12 or more (n=48) D

United Kingdom
- 58%
- 54%
- 66%

■ 2 to 5 (n=48) E
■ 6 to 11 (n=42) F
■ 12 or more (n=36) G

France
- 59%
- 54%
- 65%

■ 2 to 5 (n=56) H
■ 6 to 11 (n=42) I
■ 12 or more (n=58) J

By # of employees at organisation
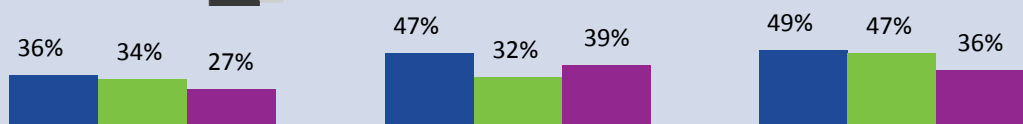
Germany
- 49%
- 64%
- 58%

■ Less than 1,000 (n=45) B
■ 1,000 to less than 3,000 (n=34) C
■ 3,000 or more (n=54) D

United Kingdom
- 52%
- 54%
- 71%

■ Less than 1,000 (n=45) E
■ 1,000 to less than 3,000 (n=30) F
■ 3,000 or more (n=50) G

France
- 38%
- 56%
- 76% H

■ Less than 1,000 (n=49) H
■ 1,000 to less than 3,000 (n=30) I
■ 3,000 or more (n=77) J
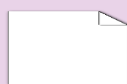
By type of travel policy
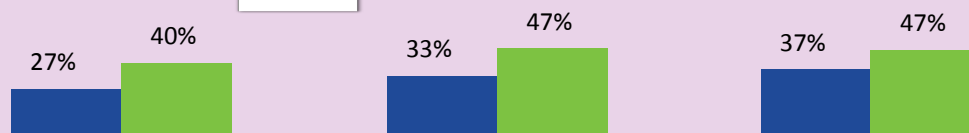
Germany
- 60%
- 53%

■ Mandated policy (n=82) B
■ General guidelines (n=47) C

United Kingdom
- 65%
- 53%

■ Mandated policy (n=66) D
■ General guidelines (n=59) E

France
- 56%
- 65%

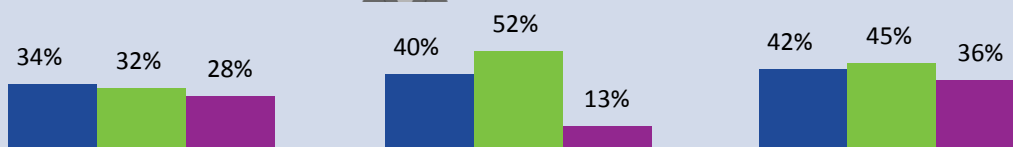■ Mandated policy (n=85) F
■ General guidelines (n=69) G

Q. In the past 12 months, which of the following specific methods have you used to book your business travel? Please select all that apply.

Use of Direct Booking in the Past Year
-amongst business travellers who had the option to use an OBT

By age group

Germany
- 34% 18 to 34 (n=45) B
- 32% 35 to 54 (n=60) C
- 28% 55 or older (n=28)* D

United Kingdom
- 40% 18 to 34 (n=50) E
- 52% 35 to 54 (n=54) F
- 13% 55 or older (n=22)* G

France
- 42% 18 to 34 (n=41) H
- 45% 35 to 54 (n=81) I
- 36% 55 or older (n=34) J

By # of business trips in the past year

Germany
- 27% 2 to 5 (n=41) B
- 34% 6 to 11 (n=44) C
- 34% 12 or more (n=48) D

United Kingdom
- 26% 2 to 5 (n=48) E
- 44% 6 to 11 (n=42) F
- 53% 12 or more (n=36) G

France
- 36% 2 to 5 (n=56) H
- 38% 6 to 11 (n=42) I
- 51% 12 or more (n=58) J

### By # of employees at organisation

Germany
- 36% Less than 1,000 (n=45) B
- 34% 1,000 to less than 3,000 (n=34) C
- 27% 3,000 or more (n=54) D

United Kingdom
- 47% Less than 1,000 (n=45) E
- 32% 1,000 to less than 3,000 (n=30) F
- 39% 3,000 or more (n=50) G

France
- 49% Less than 1,000 (n=49) H
- 47% 1,000 to less than 3,000 (n=30) I
- 36% 3,000 or more (n=77) J

By type of travel policy

Germany
- 27% Mandated policy (n=82) B
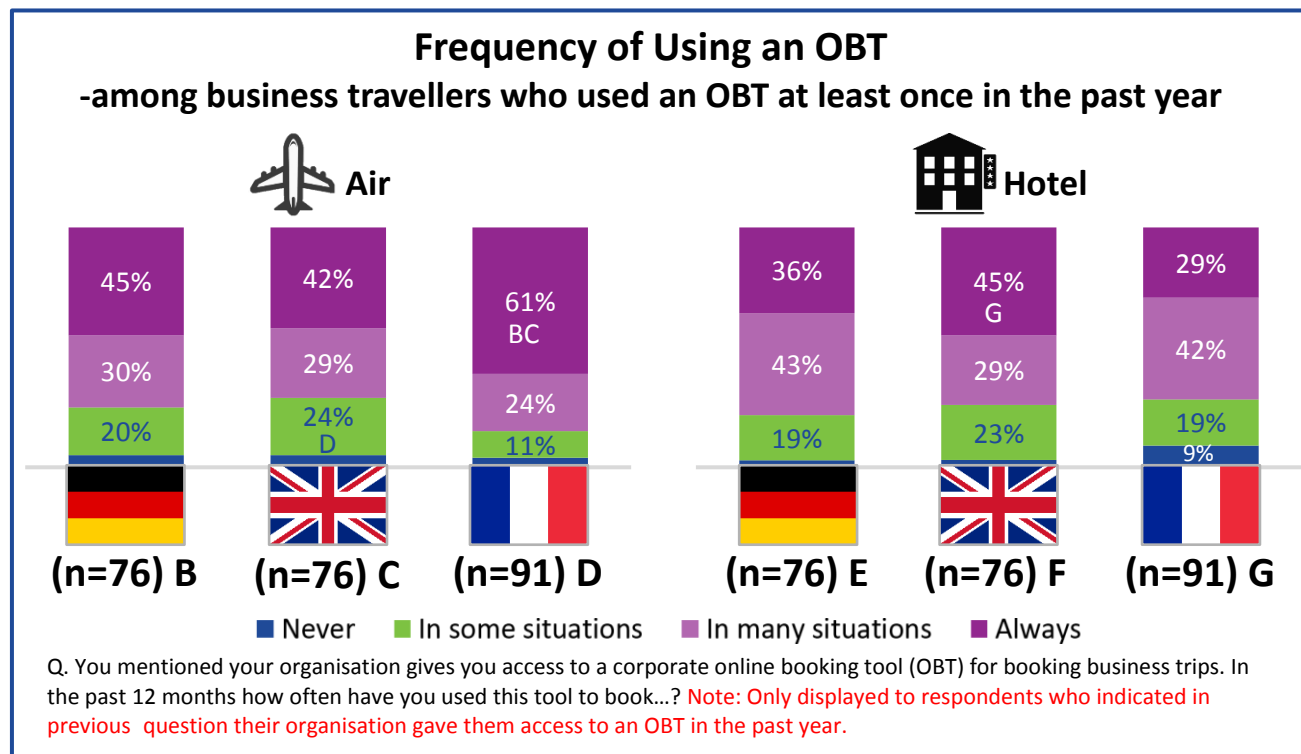- 40% General guidelines (n=47) C

United Kingdom
- 33% Mandated policy (n=66) D
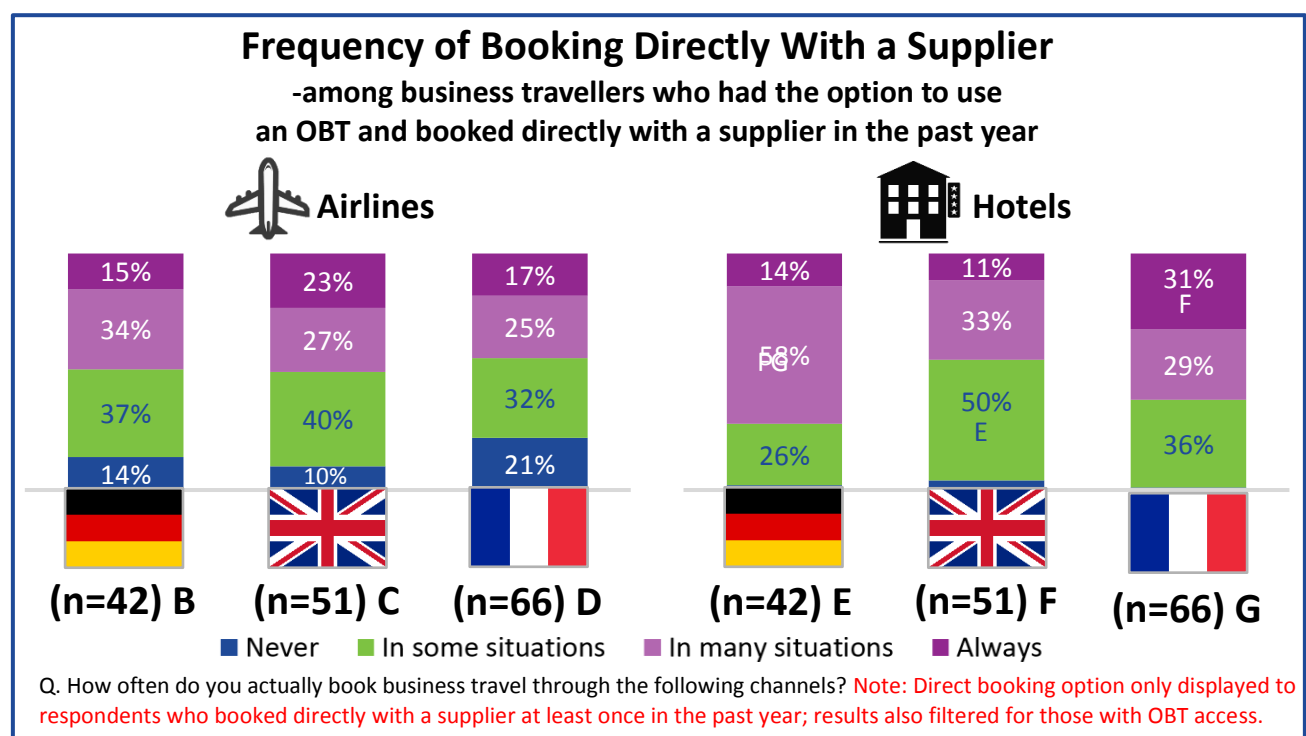- 47% General guidelines (n=59) E

France
- 37% Mandated policy (n=85) F
- 47% General guidelines (n=69) G

Q. In the past 12 months, which of the following specific methods have you used to book your business travel? Please select all that apply.

As shown earlier, a decent share of business travellers—roughly two out of five in each country—*did not* use an OBT when they had the option to use one in the past year, relying exclusively on different methods (traditional or alternative). Yet when business travellers do use an OBT, they do so frequently. Large majorities of those who used one in the past year say they do so "in many situations" or "always".

Frequency of Using an OBT
-among business travellers who used an OBT at least once in the past year

✈ Air   🏨 Hotel

	Air			Hotel		
Always	45%	42%	61% BC	36%	45% G	29%
In many situations	30%	29%	24%	43%	29%	42%
In some situations	20%	24% D	11%	19%	23%	19%
Never						9%
	(n=76) B	(n=76) C	(n=91) D	(n=76) E	(n=76) F	(n=91) G

🟦 Never 🟩 In some situations 🟪 In many situations 🟣 Always

Q. You mentioned your organisation gives you access to a corporate online booking tool (OBT) for booking business trips. In the past 12 months how often have you used this tool to book…? Note: Only displayed to respondents who indicated in previous question their organisation gave them access to an OBT in the past year.

Yet this doesn't mean that business travellers do not use other channels. As shown earlier, roughly one-third of business travellers who had OBT access still booked directly with suppliers at least once in the past year, consistent with last year's study, suggesting that direct booking is not a trend that will soon fade. Of these travellers, a good share do so "in many situations" or "always", especially when booking hotel stays. Reasons for using other channels will be discussed later in the report.

Frequency of Booking Directly With a Supplier
-among business travellers who had the option to use
an OBT and booked directly with a supplier in the past year

✈ Airlines   🏨 Hotels

	Airlines			Hotels		
Always	15%	23%	17%	14%	11%	31% F
In many situations	34%	27%	25%	58% FG	33%	29%
In some situations	37%	40%	32%	26%	50% E	36%
Never	14%	10%	21%			
	(n=42) B	(n=51) C	(n=66) D	(n=42) E	(n=51) F	(n=66) G

🟦 Never 🟩 In some situations 🟪 In many situations 🟣 Always

Q. How often do you actually book business travel through the following channels? Note: Direct booking option only displayed to respondents who booked directly with a supplier at least once in the past year; results also filtered for those with OBT access.

OBT policy

Last year's survey asked business travellers if they were always required to use their organisation's online booking tool. This year's survey included the same question, but asked about air and hotel bookings separately.

Many companies have different policies for air and hotel bookings. In each of the three countries, a majority of business travellers who used an OBT in the past year are always required to use one to book flights, while a smaller share are always required when booking hotels. This disparity between air and hotel requirements ranges from only 3 percentage points in the United Kingdom to 24 points in Germany and 31 points in France.

Are You Always Required to Use an OBT to Book…? -among business travellers who used an OBT at least once in the past year	✈ Air			🏨 Hotel		
	(n=77) B	(n=76) C	(n=93) D	(n=77) E	(n=76) F	(n=93) G
Yes	66%	54%	71% C	42%	51%	40%
No	19%	18%	12%	23%	25%	27%
It depends	15%	28%	17%	35%	25%	33%

Q. You mentioned you have used your organisation's online booking tool to book your business travel in the past 12 months. Are you **always required** to book through this method? Note: Only displayed to respondents who used an OBT at least once in the past year.

It may come as a surprise that fewer than half of business travellers say they are always required to use an OBT to book hotel stays. Yet there are a number of possible explanations. First, it could mean that companies commonly have in place policy exceptions allowing travellers to use different channels in specific circumstances, such as attending a conference or travelling to a destination where the company does not have preferred properties. Second, some companies may give travellers the option to regularly book through alternative channels at their own discretion, perhaps using special technology to integrate these bookings with the company's own system. Third, some companies may require travellers to use only *traditional* channels – such as an OBT *or* a travel agent—while prohibiting alternative channels.[2] Finally, many travellers may not understand their company's policy. They may not realize that booking directly with hotels can be "out-of-policy" even though it commonly occurs in practice.

When looking at subgroups, a decent share of travellers who follow policy guidelines are always required to use an OBT. Thus, the policy flexibility that their companies offer does not always extend to the choice of a booking tool. There are no major differences by organisation size.
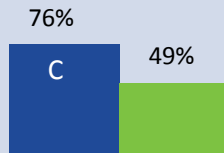
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[2] However, this third explanation likely cannot account for the large disparities between air and hotel booking policies in Germany and France

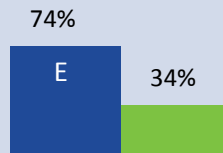# Are You Always Required to Use an OBT to Book...?

% "Yes" By Type of Travel Policy
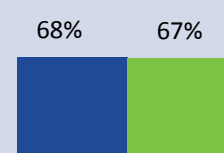
Air Travel

Germany
- 76% C
- 49%
- Mandated policy (n=84) B
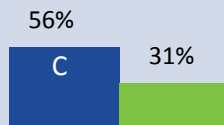- General guidelines (n=48) C

United Kingdom
- 74% E
- 34%
- Mandated policy (n=64) D
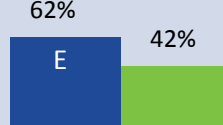- General guidelines (n=57) E

France
- 68%
- 67%
- Mandated policy (n=86) F
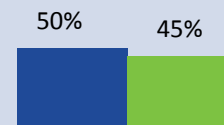- General guidelines (n=66) G

Hotel stays

Germany
- 56% C
- 31%
- Mandated policy (n=86) B
- General Guidelines (n=66) C

United Kingdom
- 62% E
- 42%
- Mandated policy (n=64) D
- General guidelines (n=57) E

France
- 50%
- 45%
- Mandated policy (n=86) F
- General guidelines (n=66) G
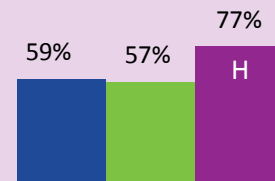
% "Yes" By Organisation Size

Air travel

Germany
- 72%
- 74%
- 57%
- Less than 1,000 (n=49) B
- 1,000 to less than 3,000 (n=36) C
- 3,000 or more (n=52) D
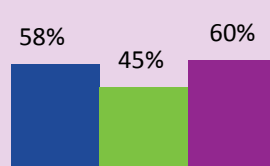
United Kingdom
- 58%
- 45%
- 60%
- Less than 1,000 (n=43) E
- 1,000 to less than 3,000 (n=29)* F
- 3,000 or more (n=49) G

France
- 59%
- 57%
- 77% H
- Less than 1,000 (n=51) H
- 1,000 to less than 3,000 (n=28)* I
- 3,000 or more (n=75) J

Hotel stays
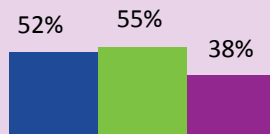
Germany
- 52%
- 55%
- 38%
- Less than 1,000 (n=49) B
- 1,000 to less than 3,000 (n=36) C
- 3,000 or more (n=52) D
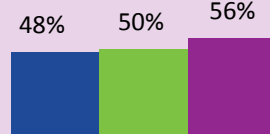
United Kingdom
- 48%
- 50%
- 56%
- Less than 1,000 (n=43) E
- 1,000 to less than 3,000 (n=29)* F
- 3,000 or more (n=49) G

France
- 62% J
- 60% J
- 35%
- Less than 1,000 (n=51) H
- 1,000 to less than 3,000 (n=28)* I
- 3,000 or more (n=75) J

2017 Booking Behaviour Study

Q. You mentioned you have used your organisation's online booking tool to book your business travel in the past 12 months. Are you **always required** to book through this method? Note: Only displayed to respondents who used an OBT at least once in the past year.
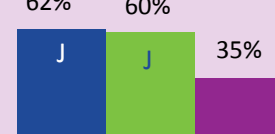
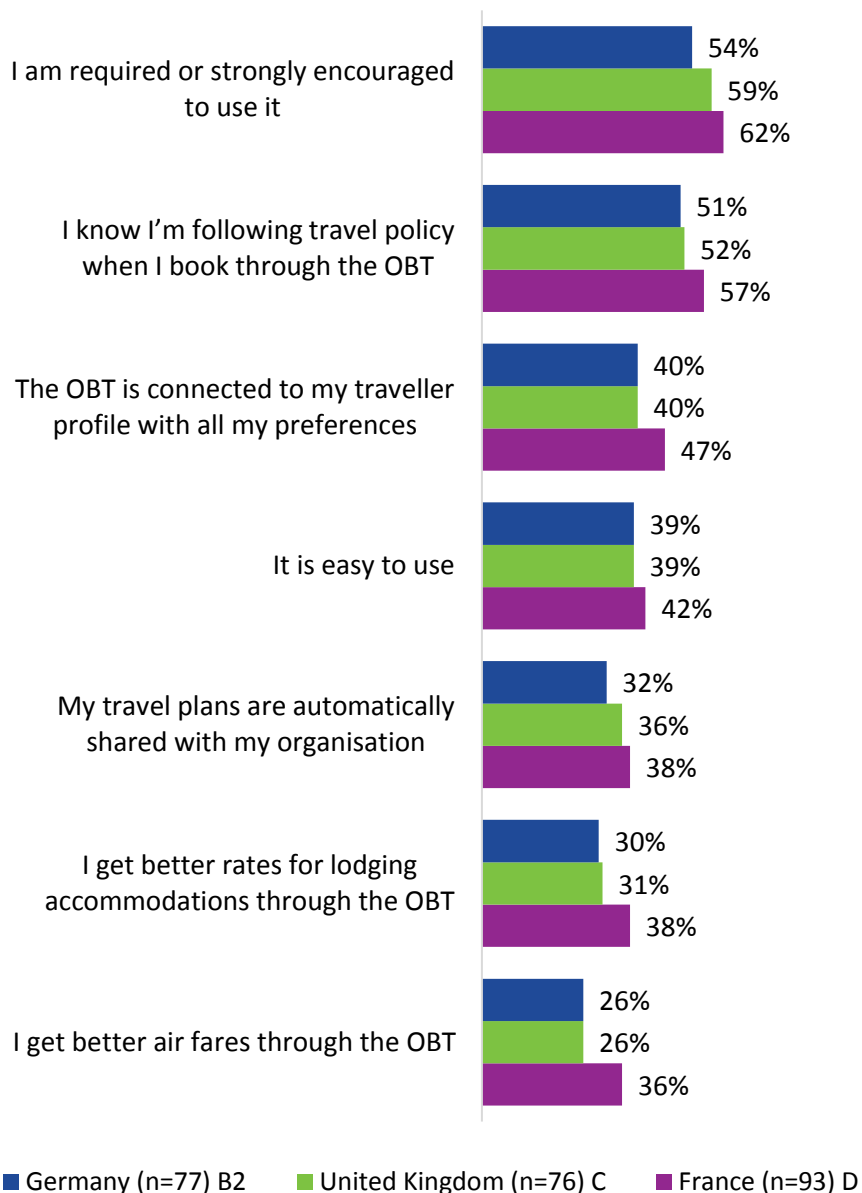## Why do business travellers use various booking channels?

When thinking about why they use an OBT, business travellers most commonly indicate a desire to conform to company policies or preferences. The most commonly indicated reasons are *I am required or strongly encouraged to use it* and *I know I'm following travel policy when I book through the OBT*.

The least commonly indicated reasons are better rates for air and lodging.Thus, many business travellers likely use an OBT because they are expected to, not because they agree that they achieve greater savings when they use one.

Similar to last year, business travellers give a variety of reasons for booking directly with suppliers. The most common are greater convenience, better pricing/offers, and the ability to earn loyalty status / receive loyalty benefits.

Reasons for Using a Corporate Online Booking Tool
-amongst business travellers who used an OBT at least once in the past year

Reason	Germany	United Kingdom	France
I am required or strongly encouraged to use it	54%	59%	62%
I know I'm following travel policy when I book through the OBT	51%	52%	57%
The OBT is connected to my traveller profile with all my preferences	40%	40%	47%
It is easy to use	39%	39%	42%
My travel plans are automatically shared with my organisation	32%	36%	38%
I get better rates for lodging accommodations through the OBT	30%	31%	38%
I get better air fares through the OBT	26%	26%	36%

■ Germany (n=77) B2   ■ United Kingdom (n=76) C   ■ France (n=93) D

Q. Which of the following are reasons why you **use** your organisation's corporate online booking tool (OBT)? Please select all that apply.

Reasons for Booking Directly
With a Supplier

All business travellers	Had option to use an OBT

More convenient

52% 50%
60% 52%
58% 58%

Better pricing/offers

52% 51%
64% 68%
45% 40%

Earn loyalty status/receive loyalty benefits

39% 41%
54% 54%
51% 51%

Ability to purchase seats, upgrades, amenities, bundles at time of booking

45% 51%
47% 39%
30% 32%

Better descriptions of hotel, rooms, flights, seat maps, car types, etc.

43% 53%
35% 40%
34% 37%

More selection

37% 37%
26% 40%
46% 52%

■ Germany (n=86) B　　　　　　■ Germany (n=42) E
■ United Kingdom (n=104) C　　■ United Kingdom (n=51) F
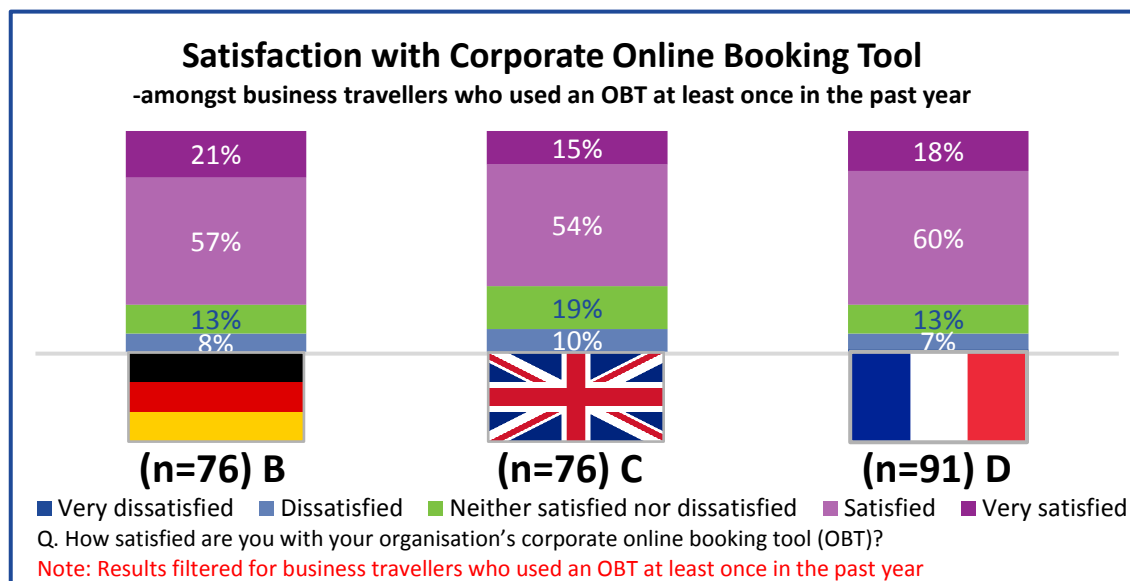■ France (n=110) D　　　　　　■ France (n=66) G

Q. Which of the following are reasons why you have booked directly with a supplier (hotel, airline, car-for-hire, etc)?
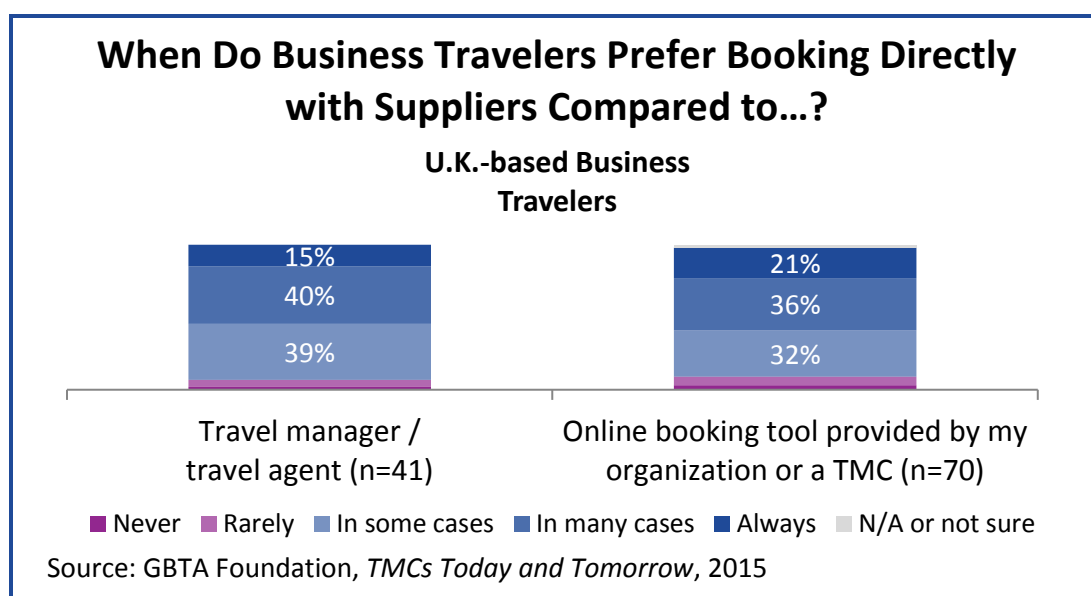
Note: Question only displayed to business travellers who used booked directly with a supplier at least once in the past year.

Satisfaction with corporate online booking tool

While business travellers most commonly use an OBT to conform to expectations (see p. 12), they are generally satisfied with the tool they have used. In each of the three countries, at least seven out of 10 travellers who used an OBT in the past year are "satisfied" or "very satisfied" with their tool. However, the share who is "very satisfied" is under one-quarter in each country.

Satisfaction with Corporate Online Booking Tool
-amongst business travellers who used an OBT at least once in the past year

	Germany (n=76) B	U.K. (n=76) C	France (n=91) D
Very satisfied	21%	15%	18%
Satisfied	57%	54%	60%
Neither satisfied nor dissatisfied	13%	19%	13%
Dissatisfied	8%	10%	7%

■ Very dissatisfied ■ Dissatisfied ■ Neither satisfied nor dissatisfied ■ Satisfied ■ Very satisfied

Q. How satisfied are you with your organisation's corporate online booking tool (OBT)?
Note: Results filtered for business travellers who used an OBT at least once in the past year

Satisfaction with alternative channels is likely higher. Last year, the GBTA Foundation surveyed 710 business travellers, including 208 in the United Kingdom.[3] Of the U.K.-based business travellers who had booked directly with a supplier *and* used an OBT in the past year, 89% prefer booking with a supplier at least "in some cases," including 57% who prefer doing so "in many cases" or "always" (see below left).

When Do Business Travelers Prefer Booking Directly with Suppliers Compared to…?

U.K.-based Business Travelers

	Travel manager / travel agent (n=41)	Online booking tool provided by my organization or a TMC (n=70)
Always	15%	21%
In many cases	40%	36%
In some cases	39%	32%

■ Never ■ Rarely ■ In some cases ■ In many cases ■ Always ■ N/A or not sure

Source: GBTA Foundation, *TMCs Today and Tomorrow*, 2015

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[3] GBTA Foundation, *TMCs Today and Tomorrow: A Survey of Business Travelers and Corporate Travel Managers* (Alexandria, VA: GBTA Foundation, 2015).
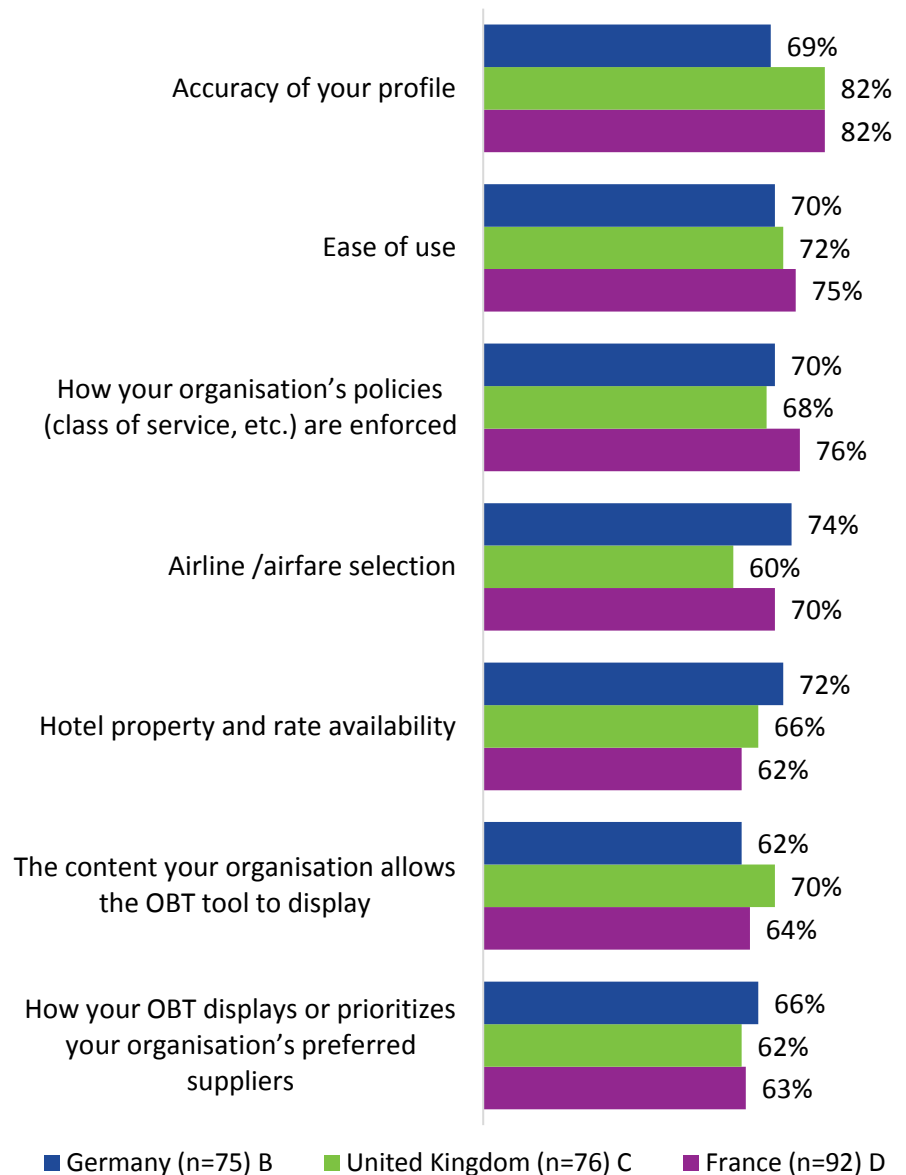
Business travellers also rated their satisfaction with various elements of their OBT. In general, they are "satisfied"—but not "very satisfied"—with these elements. The share who are "satisfied" or "very satisfied" exceeds 60% in each country for each element tested. However, the share who are "very satisfied" is generally less than one-quarter for each element (not shown).

While satisfaction ratings for all of the elements are fairly similar, the highest-rated elements deal with general functionality and the lowest-rated elements deal with content. Surprisingly, satisfaction with *hotel property and rate availability* is fairly high, even though hotel bookings are commonly made through alternative channels.

A correlation analysis was conducted to determine how the various elements relate to overall satisfaction with OBTs. All of the elements are modestly correlated with general satisfaction—and all of the correlations are statistically significant. However, the elements that correlate most strongly are *ease of use* and the *content your organisation allows the OBT tool to display*. The elements that correlate least strongly are *accuracy of your profile* and *how your organisation's policies (class of service, etc.) are enforced.*

Satisfaction With Aspects of Corporate Online Booking Tool

-% "satisfied" or "very satisfied" amongst business travellers who used an OBT at least once in the past year

Element	Germany (n=75) B	United Kingdom (n=76) C	France (n=92) D
Accuracy of your profile	69%	82%	82%
Ease of use	70%	72%	75%
How your organisation's policies (class of service, etc.) are enforced	70%	68%	76%
Airline /airfare selection	74%	60%	70%
Hotel property and rate availability	72%	66%	62%
The content your organisation allows the OBT tool to display	62%	70%	64%
How your OBT displays or prioritizes your organisation's preferred suppliers	66%	62%	63%

■ Germany (n=75) B   ■ United Kingdom (n=76) C   ■ France (n=92) D

Q. How satisfied are you with the following characteristics of your organisation's OBT? Note: Results filtered for business travellers who used an OBT at least once in the past year.

Which booking channels do business travellers prefer?

Business travellers were asked to rank their "most preferred" booking channels. Thirty percent who had OBT access in the past year rank this channel as their top choice, even if they had no restrictions. Like last year, this is higher than the rate for any other channel[4], reinforcing that most travellers are satisfied with their OBT (see p. 14). At the same time, roughly half of business travellers in each country would prefer booking directly with a supplier or using an online travel agency.

If Business Travellers Had No Restrictions, Which Channels Would They Use? % ranked as #1 choice	All Business Travellers			Business Travellers Who Had Option to Use OBT		
	🇩🇪 (n=235) B	🇬🇧 (n=235) C	🇫🇷 (n=242) D	🇩🇪 (n=139) E	🇬🇧 (n=128) F	🇫🇷 (n=159) G
✈ Direct with supplier	30%	37%	31%	23%	34% E	26%
OBT Online corporate booking tool	27% C	19%	32% C	30%	24%	37% F
OTA Online travel agency	20%	26%	20%	22%	28%	24%
Travel management company	21%	16%	16%	24% EG	13%	13%

Q. If you had no restrictions on how to book your business travel, please rank the following methods where your most preferred method = 1?

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[4] While the share who prefer using an OBT is higher than any other channel, it is considerably lower than last year; this likely reflects an error made when programming last year's survey.

THE FUTURE OF BOOKING

A key focus of this year's study is the future of booking. In particular, this year's survey focused on two questions:

1) How often will business travellers use alternative booking channels in the next year?

2) Has the growth of mobile technology changed how employees book work trips?

Anticipated use of alternative booking methods

As shown earlier, a decent share of business travellers used an alternative channel to book a work trip in the past year, even when they had OBT access (see p. 6). These travellers were asked how often they expect to use these channels in the next year. Roughly one-fourth to one-third in each country expect to rely on direct booking more often in the next year. A smaller share—generally under one-fifth—expect to rely on it less often. This suggests that direct booking could grow. However, this growth will not necessarily come at the expense of OBT booking. A good share of these same business travellers also expect to rely on an OBT more often in the next year. Travellers are split, however, when predicting their use of OTAs in the next year.

Anticipated Use of Alternative Booking Methods in the Next Year	All Business Travellers						Business Travellers Who Had Option to Use OBT					
	🇩🇪 (n=118)		🇬🇧 (n=140)		🇫🇷 (n=144)		🇩🇪 (n=67)		🇬🇧 (n=78)		🇫🇷 (n=95)	
	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"
Directly with airline	15%	25%	12%	25%	18%	30%	16%	25%	15%	31%	24%	28%
Directly with hotel	10%	31%	17%	31%	24%	31%	10%	36%	18%	34%	27%	29%
Directly with car-for-hire	17%	24%	12%	23%	18%	23%	17%	28%	11%	30%	19%	23%
Air through OTA	19%	22%	17%	16%	29%	15%	12%	31%	16%	22%	25%	20%
Lodging through OTA	20%	17%	20%	15%	30%	14%	17%	24%	17%	21%	30%	18%
Car-for-hire through OTA	19%	13%	15%	11%	26%	21%	17%	20%	13%	18%	28%	27%
Air through OBT	--	--	--	--	--	--	14%	13%	13%	25%	18%	29%
Lodging through OBT	--	--	--	--	--	--	13%	22%	12%	20%	20%	24%
Car-for-hire through OBT	--	--	--	--	--	--	14%	21%	17%	21%	16%	25%

Q. Thinking about the last 12 months, would you say you will book a business trip through the following *More Often, About the Same or Less often in the next 12 months*? I will book… Note: Question only displayed to business travellers who booked a business trip directly with a supplier or through an OTA at least once in the past year.
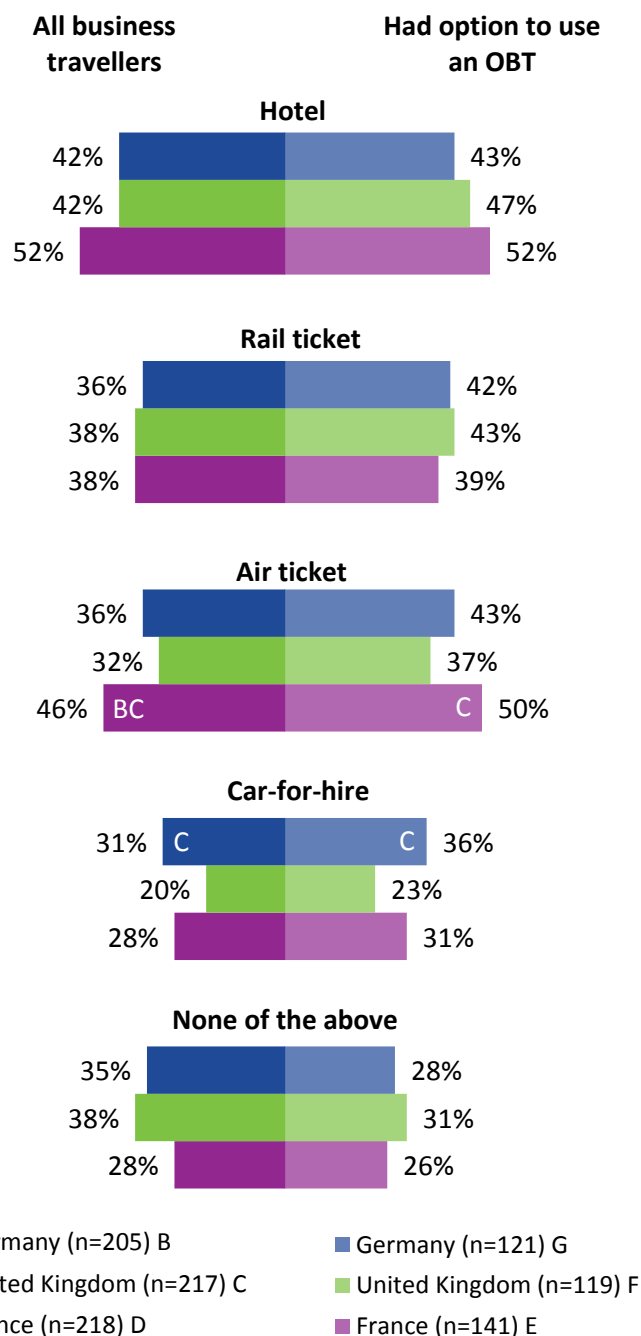
Mobile booking

A majority of business travellers booked at least one work trip on a mobile device in the past year. They commonly used a mobile device to book hotel stays, rail tickets, and air tickets. Yet it is not clear *how frequently* they booked on a mobile device. Many travellers may do so only in specific situations, such as updating a reservation while already in transit.

In prior studies, the GBTA Foundation has considered whether mobile devices could drive an uptick in non-OBT booking in the short-term. Several TMC apps do not have the same booking capabilities as OBTs. This could force travellers to book outside of company channels when using a mobile device.

Mobile booking varies across groups**.** When it comes to age, Millennials are clearly most likely to book on a mobile device (see next page) compared to other age groups. High frequency travellers (12 or more trips annually) are generally more likely than low frequency travellers (2 to 5 trips) to do so. Employees who follow policy guidlines are sometimes more likely to book on a mobile device, compared to those who are required to follow a mandated policy. This could reflect that mobile apps do not always support booking through the company's own system (see previous paragraph).

Mobile Devices Used to Book a Business Trip in the Past Year

All business travellers   **Had option to use an OBT**

Hotel

All business travellers	Had option to use an OBT
42%	43%
42%	47%
52%	52%

Rail ticket

All business travellers	Had option to use an OBT
36%	42%
38%	43%
38%	39%

Air ticket

All business travellers	Had option to use an OBT
36%	43%
32%	37%
46% BC	C 50%

Car-for-hire

All business travellers	Had option to use an OBT
31% C	C 36%
20%	23%
28%	31%

None of the above

All business travellers	Had option to use an OBT
35%	28%
38%	31%
28%	26%

■ Germany (n=205) B   ■ Germany (n=121) G
■ United Kingdom (n=217) C   ■ United Kingdom (n=119) F
■ France (n=218) D   ■ France (n=141) E
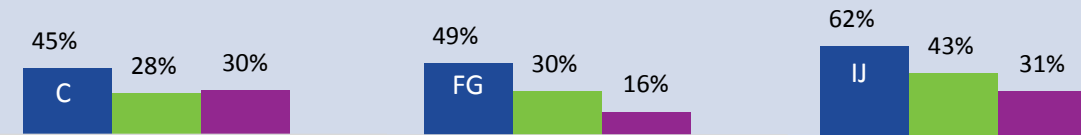
Q. In the last 12 months, thinking about business trips only, which of the following have you booked on a mobile device? Please select all that apply.

Use of Mobile Booking to Book Air Ticket in the Past Year

By age group

Germany

45% C | 28% | 30%

- 18 to 34 (n=53) B
- 35 to 54 (n=106) C
- 55 or older (n=46) D

United Kingdom

49% FG | 30% | 16%

- 18 to 34 (n=66) E
- 35 to 54 (n=97) F
- 55 or older (n=54) G

France

62% IJ | 43% | 31%

- 18 to 34 (n=57) H
- 35 to 54 (n=113) I
- 55 or older (n=48) J

By # of trips in the past year

Germany

25% | 35% | 43% B

- 2 to 5 (n=74) B
- 6 to 11 (n=71) C
- 12 or more (n=60) D

United Kingdom

25% | 36% | 43% E

- 2 to 5 (n=66) E
- 6 to 11 (n=97) F
- 12 or more (n=54) G

France

47% | 50% | 42%

- 2 to 5 (n=80) H
- 6 to 11 (n=52) I
- 12 or more (n=86) J

By # of employees at organisation

Germany

38% | 33% | 28%

- Less than 1,000 (n=87) B
- 1,000 to less than 3,000 (n=49) C
- 3,000 or more (n=68) D

United Kingdom

29% | 36% | 33%

- Less than 1,000 (n=98) E
- 1,000 to less than 3,000 (n=44) F
- 3,000 or more (n=71) G

France

56% J | 45% | 38%

- Less than 1,000 (n=75) H
- 1,000 or 3,000 (n=40) I
- 3,000 or more (n=101) J

By type of travel policy

Germany

32% | 38%

- Mandated policy (n=122) B
- General guidelines (n=75) C

United Kingdom

25% | 41% D

- Mandated policy (n=109) D
- General guidelines (n=101) E

France

38% | 55% F
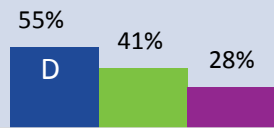
- Mandated policy (n=119) F
- General guidelines (n=96) G

Use of Mobile Booking to Book Hotels in the Past Year

By age group

Germany
55% (D) · 41% · 28%

United Kingdom
56% (G) · 43% (G) · 26%

France
61% · 51% · 44%

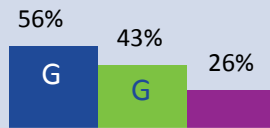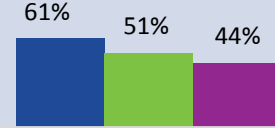**Germany**
- 18 to 34 (n=53) B
- 35 to 54 (n=106) C
- 55 or older (n=46) D

United Kingdom
- 18 to 34 (n=66) E
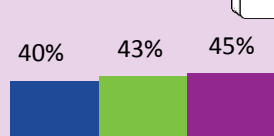- 35 to 54 (n=97) F
- 55 or older (n=54) G

France
- 18 to 34 (n=57) H
- 35 to 54 (n=113) I
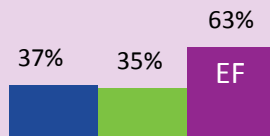- 55 or older (n=48) J
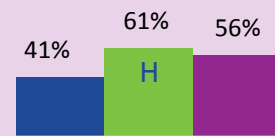
By # of trips in the past year

Germany
40% · 43% · 45%

United Kingdom
37% · 35% · 63% (EF)

France
41% · 61% (H) · 56%

Germany
- 2 to 5 (n=74) B
- 6 to 11 (n=71) C
- 12 or more (n=60) D

United Kingdom
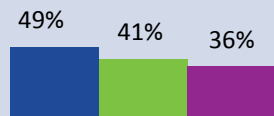- 2 to 5 (n=101) E
- 6 to 11 (n=66) F
- 12 or more (n=50) G

France
- 2 to 5 (n=80) H
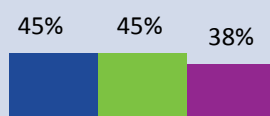- 6 to 11 (n=52) I
- 12 or more (n=86) J
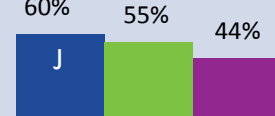
By # of employees at organisation

Germany
49% · 41% · 36%

United Kingdom
45% · 45% · 38%

France
60% (J) · 55% · 44%

Germany
- Less than 1,000 (n=87) B
- 1,000 to less than 3,000 (n=49) C
- 3,000 or more (n=68) D

United Kingdom
- Less than 1,000 (n=98) E
- 1,000 to less than 3,000 (n=44) F
- 3,000 or more (n=71) G

France
- Less than 1,000 (n=75) H
- 1,000 or 3,000 (n=40) I
- 3,000 or more (n=101) J

By type of travel policy

Germany
38% · 48%

United Kingdom
40% · 45%
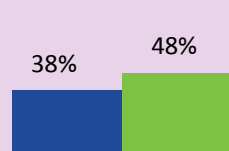
France
43% · 62% (F)

Germany
- Mandated policy (n=122) B
- General guidelines (n=75) C
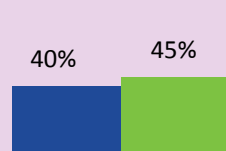
United Kingdom
- Mandated policy (n=109) D
- General guidelines (n=101) E
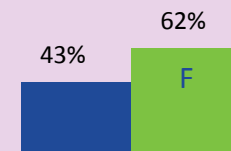
France
- Mandated policy (n=119) F
- General guidelines (n=96) G

Q. In the last 12 months, thinking about business trips only, which of the following have you booked on a mobile device? Please select all that apply.

Use of Mobile Booking to Book Rail Ticket in the Past Year

By age group

Germany
60% CD
29%
21%

- 18 to 34 (n=53) B
- 35 to 54 (n=106) C
- 55 or older (n=46) D

United Kingdom
42% G
45% G
21%

- 18 to 34 (n=66) E
- 35 to 54 (n=97) F
- 55 or older (n=54) G

France
37%
42%
32%

- 18 to 34 (n=57) H
- 35 to 54 (n=113) I
- 55 or older (n=48) J

By # of trips in the past year

Germany
29%
36%
46% B

- 2 to 5 (n=74) B
- 6 to 11 (n=71) C
- 12 or more (n=60) D

United Kingdom
31%
39%
49% E

- 2 to 5 (n=101) E
- 6 to 11 (n=66) F
- 12 or more (n=50) G

France
40%
39%
36%

- 2 to 5 (n=80) H
- 6 to 11 (n=52) I
- 12 or more (n=86) J

By # of employees at organisation

Germany
36%
52% D
26%

- Less than 1,000 (n=87) B
- 1,000 to less than 3,000 (n=49) C
- 3,000 or more (n=68) D

United Kingdom
36%
41%
38%

- Less than 1,000 (n=98) E
- 1,000 to less than 3,000 (n=44) F
- 3,000 or more (n=71) G

France
46% J
47% J
29%

- Less than 1,000 (n=75) H
- 1,000 or 3,000 (n=40) I
- 3,000 or more (n=101) J

By type of travel policy

Germany
32%
42%

- Mandated policy (n=122) B
- General guidelines (n=75) C

United Kingdom
31%
47% D

- Mandated policy (n=109) D
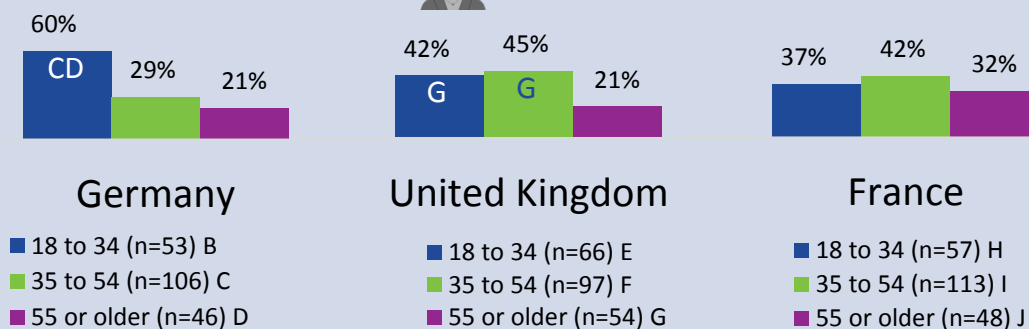- General guidelines (n=101) E

France
29%
47% F

- Mandated policy (n=119) F
- General guidelines (n=96) G

Q. In the last 12 months, thinking about business trips only, which of the following have you booked on a mobile device? Please select all that apply.
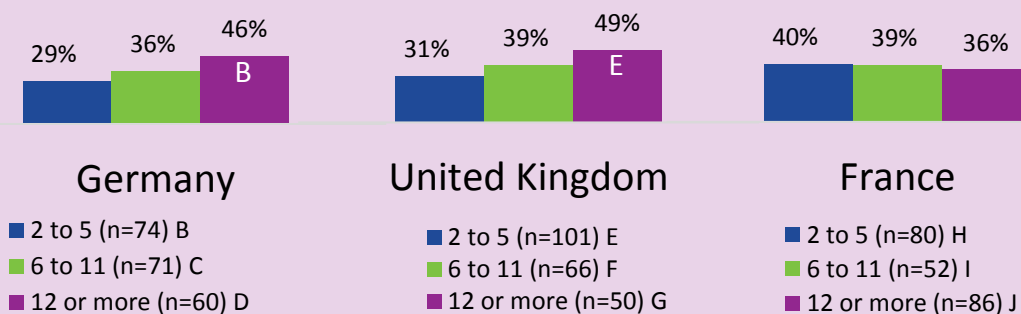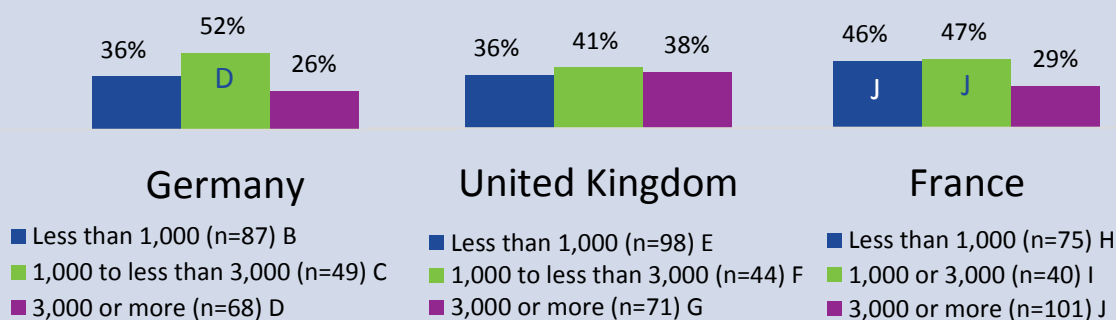
Mobile booking will likely grow in the near future. A decent share of business travellers expect to book on a mobile device "more often" in the next year, while only a tiny share expect to do so "less often". The disparity is especially large for hotel bookings.

In the Next Year, How Often Will Business Travellers Use a Mobile Device to Book…?	All Business Travellers						Business Travellers Who Had Option to Use OBT					
	🇩🇪 (n=235)		🇬🇧 (n=235)		🇫🇷 (n=242)		🇩🇪 (n=139)		🇬🇧 (n=128)		🇫🇷 (n=159)	
	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"	% "Less often"	% "More often"
Hotel	4%	30%	8%	22%	8%	29%	4%	35%	10%	25%	8%	28%
Rail ticket	14%	21%	10%	20%	19%	24%	15%	23%	13%	24%	20%	25%
Air ticket	8%	22%	8%	23%	14%	23%	9%	26%	10%	27%	13%	26%
Car-for-hire	13%	20%	10%	15%	22%	18%	16%	21%	12%	19%	24%	20%

Q. Thinking about the last 12 months, would you say you will book a business trip through the following *More Often, About the Same or Less often in the next 12 months*? I will book…

Sharing services

In Europe, sharing services accounted for €3.6 billion of revenue from €28 billion of transactions in 2015, according to a PwC UK study, released in 2016.[5] This represents a remarkable 97% increase in revenue, and 77% increase in transaction value, over 2014.[6] In 2025, the study projects that revenue will reach €83 billion from €570 of transactions.[7]

This trend can have a major impact on managed travel. When business travellers use ride-sharing or home-sharing services, their travel programmes may be unable to fulfil several key functions including tracking travellers, vetting suppliers for safety and value, and maximizing volume with preferred vendors.

In the current study, companies are divided when it comes to their policies on sharing services. Fewer than one-third of business travellers indicate their company allows them to use sharing services. At the same time, a large share indicate their company does not address these services, which may allow them to sometimes use these services in practice.

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[5] Robert Vaughan and Rapahael Daveiro. *Assessing the size and presence of the collaborative economy in Europe* (PwC UK, 2016).

[6] Ibid.

[7] Ibid.

Policy on Sharing Services	Ride-sharing			Home-sharing		
	(n=235) B	(n=235) C	(n=242) D	(n=235) E	(n=235) F	(n=242) G
My organisation allows me to use	22%	29%	28%	28%	29%	26%
My organisation does not allow me to use	42% CD	18%	31% C	43%	28%	35%
My organisation does not address	19%	29% B	30% B	16%	24%	23%
I do not know if service is allowed	16%	23% D	12%	13%	18%	15%

Q. Which of the following statements **best describes** your organisation's stand on the use of **ride-sharing** services (e.g. Uber) during business travel?
Q. Which of the following statements **best describes** your organisation's stand on the use of **homesharing -sharing** services (e.g. Airbnb, HomeAway, VRBO) during business travel?

Despite rapid growth of sharing services, at least two-thirds of business travellers in each of the three countries "rarely" or "never" use them on work trips. This could reflect, among other things, (1) that many companies prohibit these services, and many travellers do not know if they are allowed to use them (see above); or (2) that many travellers likely have the option to receive reimbursement for potentially more expensive options such as car rentals, chaueferred transportation, and hotels.

Use of Sharing Services on Business Trips in the Past Year

Ride-sharing

	(n=235) B	(n=235) C	(n=242) D
Often/All the time	13%	21%	21%
Sometimes	11%	13%	14%
Never/Rarely	76%	66%	66%

Home-sharing

	(n=235) E	(n=235) F	(n=242) G
Often/All the time	14%	16%	18%
Sometimes	9%	12%	10%
Never/Rarely	77%	72%	72%

■ Never/Rarely   ■ Sometimes   ■ Often/All the time

Q. How often have you used ride-sharing services (Uber) while on a business trip in the past 12-months?
Q. How often have you stayed at home-sharing services (Airbnb, HomeAway, VRBO) while on a business trip in the past 12-months?

When travelling for business, Millennials use sharing services at a much higher rate than older business travellers. In each country, one-fourth of Millennial travellers indicate they use them "often" or "all the time" on work trips. This suggests business travellers could be much more likely to use sharing services in the future, as older travellers exit the workforce.

Frequency of Using Ride-Sharing Services in the Past Year
% who used one "often" or "all the time" by age group

Germany	United Kingdom	France
29% CD, 8%, 4%	49% FG, 11%, 2%	37% IJ, 18%, 7%
■ 18 to 34 (n=61) B	■ 18 to 34 (n=71) E	■ 18 to 34 (n=67) H
■ 35 to 54 (n=120) C	■ 35 to 54 (n=107) F	■ 35 to 54 (n=121) I
■ 55 or older (n=54) D	■ 55 or older (n=57) G	■ 55 or older (n=54) J

Frequency of Using Home-Sharing Services in the Past Year
% who used one "often" or "all the time" by age group

Germany	United Kingdom	France
36% CD, 7%, 2%	41% FG, 6%, 0%	28% J, 20% J, 2%
■ 18 to 34 (n=61) B	■ 18 to 34 (n=71) E	■ 18 to 34 (n=67) H
■ 35 to 54 (n=120) C	■ 35 to 54 (n=107) F	■ 35 to 54 (n=121) I
■ 55 or older (n=54) D	■ 55 or older (n=57) G	■ 55 or older (n=54) J

Q. How often have you used ride-sharing services (Uber) while on a business trip in the past 12-months?
Q. How often have you stayed at home-sharing services (Airbnb, HomeAway, VRBO) while on a business trip in the past 12-months?

CONCLUSION

In Germany, the United Kingdom, and France, business travellers frequently use OBTs and are generally satisfied with them. However, even when they had OBT access, at least one-third of business travellers in each of these countries booked directly with a supplier, and at least one-quarter used an online travel agency / site, in the past year.

When thinking about the future, Travel Managers should consider several possible trends:

(1) **Reasons for OBT satisfaction:** Several specific aspects of OBTs correlate moderately with overall OBT satisfaction. The two most strongly correlated are *ease of use* and the *content your organisation allows the OBT tool to display*. Travel Managers can perhaps influence these elements – by providing greater support to OBT users or making more content available.

(2) **Use of alternative booking channels:** At least one-fourth of travellers who made a direct booking for business travel in the past year expect to do so more often in the next year, while a smaller share expect to do so less often. Moreover, Millennials use OBTs less frequently than their older counterparts, suggesting that unless their behaviour changes alternative booking will continue to grow in the long-term. Further, continued growth of sharing services could lead to grater use of alternative channels. As a result, travel programs may have reduced visibility into bookings over time, and thus face greater difficulty ensuring duty of care and achieving cost savings. It's important for Travel Managers to plan for this growing trend in their programs – ensuring they capture and manage employee travel no matter where or how it was purchased.

(3) **The continued rise of mobile booking:** A good share of business travellers—generally more than one-fifth in each of the three countries—expect to rely on mobile booking more often in the next year. A much smaller share expect to rely on it less often. Travel Managers should consider addressing mobile behaviour in their company travel policy, or recommending particular travel apps—such as TMC apps or preferred supplier apps.

WORKS CITED

GBTA Foundation, *Booking Behaviour – The Business Traveller's Perspective: A Survey of Business Travellers in the United Kingdom, Germany, and France.* Alexandria, VA: GBTA Foundation, 2016.

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RESPONDENT PROFILE[8]

Respondent Demographics	🇩🇪	🇬🇧	🇫🇷
Gender	**(n=236)**	**(n=236)**	**(n=242)**
Male	60%	55%	56%
Female	40%	45%	44%
Age	**(n=236)**	**(n=236)**	**(n=242)**
18 to 24	9%	10%	6%
25 to 34	19%	22%	21%
35 to 44	21%	21%	22%
45 to 54	27%	20%	24%
55 to 64	20%	18%	19%
65 or over	4%	8%	6%
Estimated average	44 years	43 years	43 years
# of Employees at Company[9]	**(n=236)**	**(n=236)**	**(n=242)**
Less than 1,000	43%	44%	35%
1,000 to less than 3,000	22%	20%	18%
3,000 or more	35%	33%	46%
Estimated Average	1,700 employees	1,600 employees	1,900 employees
Employment Status	**(n=236)**	**(n=236)**	**(n=242)**
Full-time	93%	90%	94%
Part-time	7%	10%	6%

[8] Note: All percentages shown are after weighting.

[9] Note: Three percent of business travelers in the United Kingdom and 1% in France are "not sure" of their company size (not shown in table).

Number of Business Trips in Past Year	(n=236)	(n=236)	(n=242)
2 to 5	37%	46%	36%
6 to 11	35%	31%	26%
12 or more	29%	23%	38%
Estimated average	10 trips	10 trips	13 trips

Most Common Reason to Travel for Business	(n=236)	(n=236)	(n=242)
Client meeting	29%	26%	31%
Internal company meeting	25%	22%	24%
Conference / training	29%	20%	16%
Off-site work	6%	20%	15%
Trade show / expo	6%	6%	11%
Other	5%	5%	3%

Types of Business Travel Destinations in the Past Year	(n=236)	(n=236)	(n=242)
Domestic	61%	57%	60%
International within Europe	53%	53%	57%
International long-haul	27%	24%	20%
All of the above	14%	19%	14%

Company's Travel Policy	(n=236)	(n=236)	(n=242)
I am required to follow my company's published and enforced travel policies	59%	50%	54%
I am encouraged to follow general guidelines	37%	47%	45%

My company has a travel policy, but I don't know what it is	4%	3%	2%
Does Your Organisation Use a TMC for Any Product / Service?	**(n=236)**	**(n=236)**	**(n=242)**
Yes	65%	70%	72%
No	21%	19%	23%
Not sure	15%	11%	5%
Has Organisation / TMC Given You the Option to Book Using a Corporate Online Booking Tool in Past Year?	**(n=236)**	**(n=236)**	**(n=242)**
Yes	59%	55%	66%
No	29%	36%	30%
Not sure	12%	9%	4%

ABOUT THE GBTA FOUNDATION

The GBTA Foundation is the education and research arm of the Global Business Travel Association (GBTA), the world's premier business travel and corporate meetings organization. Collectively, GBTA's 9,000-plus members manage over $345 billion of global business travel and meetings expenditures annually. GBTA provides its network of 21,000 business and government travel and meetings managers, as well as travel service providers, with networking events, news, education & professional development, research, and advocacy. The foundation was established in 1997 to support GBTA's members and the industry as a whole. As the leading education and research foundation in the business travel industry, the GBTA Foundation seeks to fund initiatives to advance the business travel profession. The GBTA Foundation is a 501(c)(3) nonprofit organization. For more information, see gbta.org and gbta.org/foundation.

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