

# How Traveller Booking Behaviour Impacts Safety

November 2017

In partnership with:



## Table of Contents

Overview .....	p. 3
Methodology .....	p. 3
Key Findings .....	p. 4
Traveller Perceptions of Duty of Care .....	p. 6
Do business travellers think their organization cares about their safety? .....	p. 6
Booking Methods: The Duty of Care Connection.....	p. 7
Booking methods and preferences .....	p. 7
The duty of care connection .....	p. 10
Travel Risk Services .....	p. 12
Assistance hotline .....	p. 13
Travel advisories/notifications.....	p. 16
SMS text alerts and communication .....	p. 17
Travel safety training .....	p. 20
GPS tracking .....	p. 24
Conclusion .....	p. 28
Works Cited .....	p. 29
Respondent Profile .....	p. 30
About the GBTA Foundation .....	p. 32
About Concur .....	p. 32

## Overview

All companies have a moral and legal responsibility for the safety of their employees. “Duty of care” not only applies at the workplace, but also when employees work from a remote location or travel for business. This study, based on a survey of business travellers in France, Germany and the United Kingdom, and conducted in partnership with Concur, examines duty of care from the business traveller’s perspective. It focuses mainly on two key aspects of duty of care:

1. **Booking data and programme visibility:** Virtually every risk management function that companies perform depends to some extent on booking data. What happens when travellers book outside of their company’s preferred channels? How does their company capture data from these bookings?
2. **Risk services:** How often do companies provide travellers with various risk services such as an emergency assistance hotline, traveller training, travel advisories, and SMS (text) communication?

## Methodology

An online survey was conducted of business travellers in Germany, the United Kingdom, and France. The survey was conducted by the GBTA Foundation using a business traveller panel. Fielding took place from September 26, 2017, to October 3, 2017. Seven hundred and thirty-five business travellers completed the survey in France (243), Germany (245) and the United Kingdom (247).

Respondents qualified if they were employed (full- 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 travelled at least twice for business in the past year. However, this does not mean their company had a fully managed programme. For instance, in each of the three countries, at least one-third of travellers say their organisation does not use a travel management company (TMC) for any product or service, or do not know if it uses one (see p.31).

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.

Readers should exercise caution when making comparisons between the three countries as result of some differences between them.

To supplement these findings, in-depth interviews were conducted with Travel Managers, from each of the three countries. Quotes from two of these interviews are presented throughout the report.

## Key Findings

- **When business travellers book outside of company channels, their company may not be able to capture their plans.** Fewer than two out of five travellers say their organisation “has a system in place that captures (their) travel plans” when they book directly with a supplier.”
- **About two-thirds of business travellers whose company uses a travel management company (TMC) agree that not booking through company channels can “affect (their) safety by making it more difficult for (their company or TMC) to locate/contact (them) in an emergency.”** While the majority still book through an OBT, the irony is that roughly 7 out of 10 travellers booked outside of company channels at least once in the past year, even when they had access to an OBT.
- The GBTA Foundation has tracked the booking behaviour of business travellers in Europe’s three largest business travel markets over the past three years. **Over this period, a fairly constant share have used a corporate online booking tool (OBT) or booked directly with a supplier, while a growing share have used an online travel agency (OTA) such as Expedia or Odopo.<sup>1</sup>**
- **Travellers feel their company takes duty of care is seriously.** In Germany, the United Kingdom, and France, at least three-quarters of business travellers “agree” or

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<sup>1</sup> When making year-over-year comparisons, it is important to know that each survey was fielded to a different sample of business travellers. As a result, small differences may reflect the unique makeup of the different samples, and not year-over-year change.

“strongly agree” that their organisation “cares about (their) safety when (they) travel for work.

- **Yet access to various risk management services is far from universal.** Roughly one-third or more do not have access to various basic risk management services. This could reflect that many travellers are not part of a fully managed programme<sup>2</sup>. However, even when travellers say their company uses a “travel management company (TMC) for any product or service,” more than one-fifth do not think they have access to various key services. These travellers may (1) not be aware of services that are actually available to them or (2) work for companies that use TMCs in a limited way.
- **More than one half of business travellers say their organisation provides *travel safety training*, though the topics covered can vary.** In each country, a majority who have **received** training would want to receive it more than once annually. In addition, more than one-third of travellers believe they would have benefitted from customised training or resources, based on personal characteristics such as gender, sexual orientation, or religion, in the past year.

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<sup>2</sup> Respondents qualified for this survey only if their company had a travel policy. However, this does not mean their company had a fully managed programme. For instance, in each of the three countries, at least one-third of travellers say their organisation does not use a travel management company (TMC) for any product or service, or do not know if it uses one (see p. 28).

## Traveller Perceptions of Duty of Care

### Do business travellers think their company cares about their safety?

In Europe, most business travellers think their company takes duty of care seriously. In the three countries surveyed, respondents overwhelmingly agree that their “organisation cares about (their) safety when (they) travel for work.”

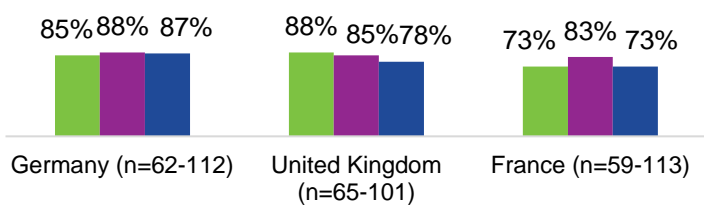
This includes more than one-third in each country who strongly agree (not shown). Employees of small, mid-sized, and

large companies all agree that their employer cares about their safety when they travel. This may reflect that small companies provide various risk services at comparable—if only slightly lower—rates as their larger counterparts. Younger travellers are more likely to think their company takes duty of care seriously.

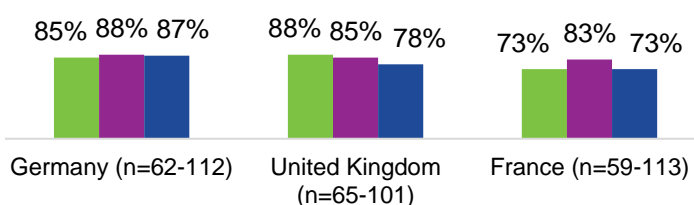


### Do Business Travellers Think Their Company Cares About Their Safety When They Travel? % “agree” or “strongly agree”

by # of employees at company



by age



■ Less than 500 ■ 500 to less than 1,000 ■ 1,000 or more ■ 18 to 34 ■ 35 to 54 ■ 55 or older

## Booking Methods: The Duty of Care Connection




Booking data plays a critical role in duty of care – enabling virtually every risk management function that companies perform. Many companies use booking data to send travellers alerts about their travel destination or trip, or to locate them in an emergency. Companies also use booking data to identify first-time or infrequent travellers and brief them about the assistance resources available through their company or TMC. Booking data can also play a role in the pre-trip approval process – enabling companies to flag high-risk trips and make sure these receive proper vetting.

### Booking methods and preferences

In the past two years, the GBTA Foundation, in partnership with Concur, conducted surveys about the booking methods and preferences of business travellers in Europe's three largest markets: Germany, the United Kingdom, and France.<sup>3 4</sup>

This year's survey also included relevant questions about booking because of its importance to duty of care.<sup>5</sup>

In all three surveys, a majority of business travellers who had access to an OBT say they used one to book at least one work trip in the past year. However, roughly seven out of 10 travellers booked at least one trip through an alternative channel, such as a supplier website or OTA, even though they had OBT access (see next page).







Booking Methods Used in the Past Year among business travellers who had access to an OBT	Online booking tool		
			
2015	52%	51%	60%
2016	57%	59%	60%
2017	51%	51%	51%

Germany: 2015 n=109; 2016 n=133; 2017 n=147  
United Kingdom: 2015 n=64; 2016 n=126; 2017 n=139  
France: 2015 n=81; 2016 n=156; 2017 n=166

<sup>3</sup> 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).

<sup>4</sup> 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).

<sup>5</sup> When making year-over-year comparisons, it is important to know that each survey was fielded to a different sample of business travellers. As a result, small differences may reflect the unique makeup of the different samples, and not year-over-year change.








Booking Methods Used in the Past Year among business travellers who had OBT access	Direct with supplier			OTA		
						
2015	35%	44%	36%	27%	35%	21%
2016	32%	39%	42%	29%	39%	29%
2017	36%	55%	43%	44%	51%	40%

Germany: 2015 n=109; 2016 n=133; 2017 n=147

United Kingdom: 2015 n=64; 2016 n=126; 2017 n=139

France: 2015 n=81; 2016 n=156; 2017 n=166

Travelers have a variety of different booking preferences. When business travellers have OBT access, one-fourth indicate that an OBT is their “most preferred” booking method, assuming they had “no restrictions on how to book (their) business travel.” Roughly one-half of these same travellers indicate that direct booking or OTAs are their most preferred method. These are similar to the figures obtained in the previous two years.

If Business Travellers Had No Restrictions, Which Channels Would They Use? % ranked as #1 choice	Business Travellers Who Had Option to Use OBT		
			
 Direct with supplier	23%	27%	32%
 Online travel agency	26%	31%	23%
 Corporate online booking tool	27%	24%	25%
 Travel management company	23%	19%	18%








Germany: 2015 n=109; 2016 n=133; 2017 n=147

United Kingdom: 2015 n=64; 2016 n=126; 2017 n=139

France: 2015 n=81; 2016 n=156; 2017 n=166



Even roughly seven out of 10 business travellers have booked at least one business trip outside of their OBT in the past year, one-third to one-half say they plan to use their OBT “more often” in the next year, while fewer than 15% plan to use it “less often.” However, one-fifth to two-fifths of these same travellers also plan to book direct, or use an OTA, more often in the next year.

Anticipated Use of Various Booking Methods in the Next Year	Business Travellers Who Had Option to Use OBT					
						
	% “Less often”	% “More often”	% “Less often”	% “More often”	% “Less often”	% “More often”
 Corporate online booking tool	7%	35%	7%	49%	13%	42%
 Online travel agency	11%	27%	12%	41%	20%	36%
 Direct with supplier	15%	22%	12%	38%	17%	28%
 Travel management company	11%	28%	25%	29%	22%	21%

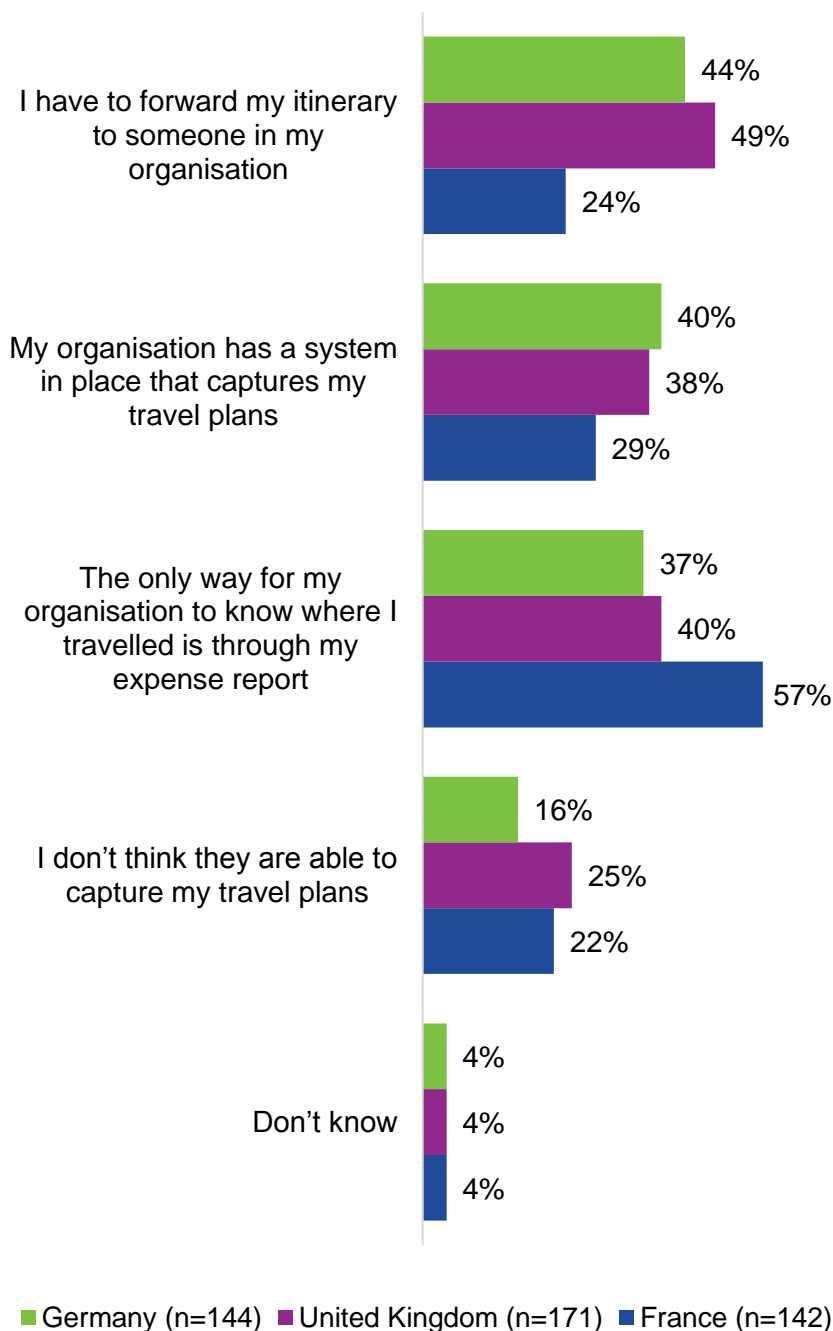
Germany: n=147  
United Kingdom: n=139  
France: n=166

## The duty of care connection

Missing or incomplete booking data can hinder duty of care. Fewer than two out of five travellers say their organisation “has a system in place that captures (their) travel plans” when they book directly with a supplier. As often, companies expect their travellers to manually “forward (their) itinerary to someone in (their) organisation.” This approach can pose problems. Travellers may forget to forward their itinerary, or not know they are expected to do so; or they may change their travel plans at the last minute and forget to forward their itinerary.

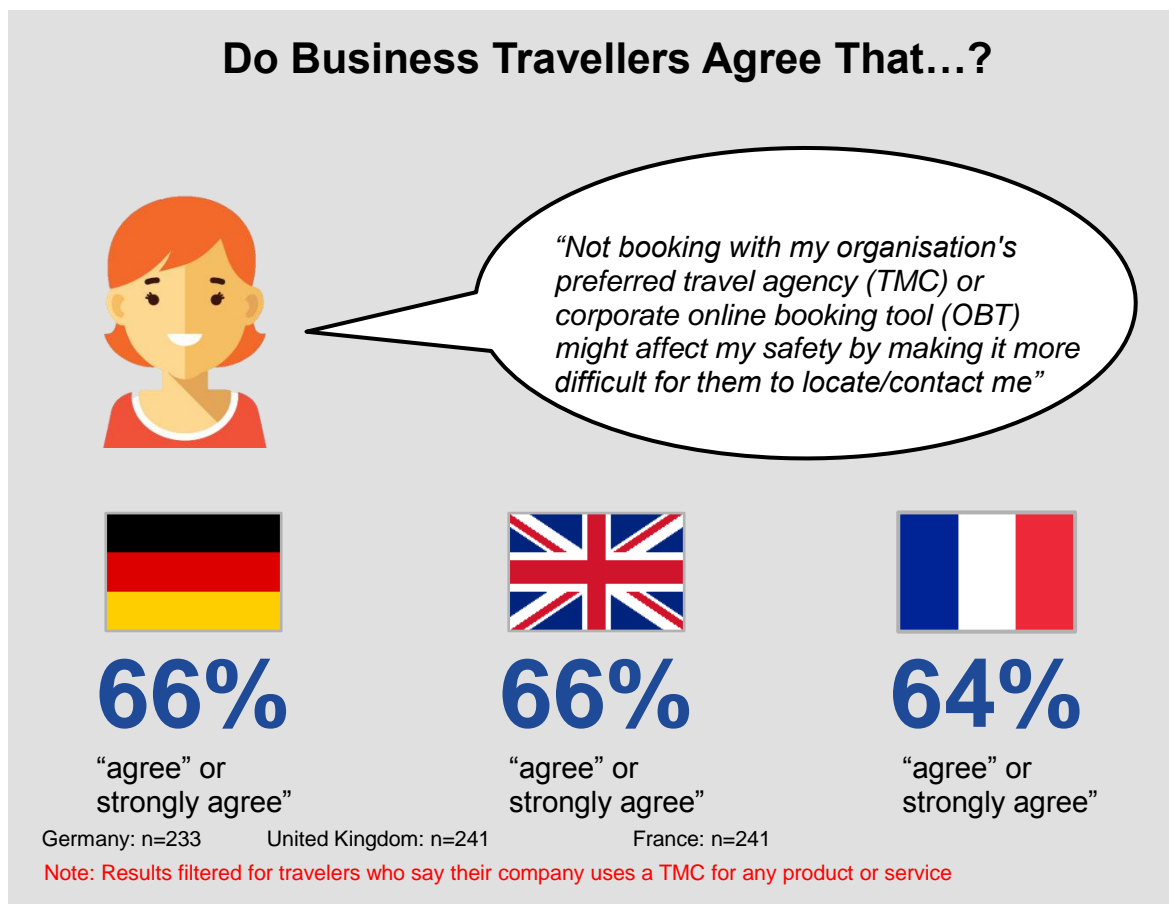
Many business travellers say that “the only way for (their) organisation to know where they travelled is through (their) expense report.” This includes 37% in Germany, 40% in the United Kingdom, and 57% in France. While this data may give travel programmes spend visibility, it would not help them—in most cases—with their duty of care. Expense data gives companies visibility after the trip has occurred; yet unless it is integrated with other technology platforms, it generally does not provide real-time, actionable data that companies can use to assist their travellers in an emergency or unexpected event.

## When Travellers Use Alternative Booking Channels, How Does Their Company Capture Their Travel Plans?



Note: Question only displayed to respondents who indicated booking directly with a supplier, or through an online travel agency, at least once in the past year.

About two-thirds of business travellers whose company uses a TMC agree that not booking through company channels can “affect (their) safety by making it more difficult for (their company or TMC) to locate/contact (them) in an emergency.” The irony is that roughly seven out of 10 travellers book outside of company channels (see p. 7) even though many agree that it can affect their safety.



Most Travel Managers would agree that these alternative bookings—made outside of company channels-- can complicate duty of care by making it difficult to locate travellers. However, they might pursue different approaches to address this

problem. They can tighten their travel policy – mandating that travellers book through specific channels, limiting exceptions, and even promising to withhold reimbursement from travellers who ignore the policy. Yet this approach, if pursued too aggressively, can make it cumbersome to approve justifiable exceptions and may even force travellers to make reservations that do not

*When you don't have any travel arranger and the traveler is doing it by himself, it's very difficult to get him to go through the online tool...They all prefer to call."*

**-France-based Travel Manager**

meet their needs or their company's needs. Alternatively, companies can adopt technology to capture bookings made directly with certain suppliers, or forwarded by travellers via email as well as processes to educate and help the traveller understand the importance of capturing their travel plans.

For most companies, however, a one-sided approach—which relies exclusively on strengthening their travel policy or adopting technology to capture outside bookings—is likely insufficient. Yet a combination of strategies can help companies achieve high compliance while capturing bookings that are inevitably made outside of their travel programme.

## Travel Risk Services

This section examines whether business travellers have access to six basic risk-related services:

1. An assistance hotline to call in an emergency or unrelated event
2. Travel advisories/notifications
3. Travel health advisories
4. Communication via SMS (text) messaging
5. Travel safety training
6. GPS tracking

Two takeaways emerge when analyzing the risk services that travellers can access:

- 1. Even though business travellers feel their company cares about their safety when they are on the road, at least one-quarter commonly do not have access to key services that “managed” travel programmes would commonly provide.** For instance, more than three out of ten respondents do not have access to an *assistance hotline to call in an emergency or unexpected event*. This means that (1) many travellers are not part of a managed programme<sup>6</sup> and (2) others may be unaware of the services available to them.

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<sup>6</sup> Respondents qualified for this survey only if their company had a travel policy. However, this does not mean their company had a fully managed programme. For instance, in each of the three countries, at At

- **More than one half of business travellers say their organisation provides *travel safety training*, though the topics covered can vary.** In each country, a majority who have received training would want to receive it more than once annually. In addition, more than one-third of travellers believe they would have benefitted from customised training or resources, based on personal characteristics such as gender, sexual orientation, or religion, in the past year.

## Assistance hotline

A majority of respondents say their company provides an *assistance hotline to call in an emergency or unexpected event* – one of the most essential risk services available. However, access is far from universal. In Germany, more than half (51%) of travellers either do not have access to one (38%) or do not know if they have access (13%). A decent share in the U.K. (36%) and France (29%) also say they their company does not provide a hotline.

In each country, one-quarter to one-third of travellers do not have OBT access even when they say their company uses a TMC<sup>7</sup>, though this could reflect limited awareness about available resources.

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<sup>7</sup> A least one-third of travellers say their organisation does not use a travel management company (TMC) for any product or service, or do not know if it uses one (see p. 31).

## Does Your Organisation Provide Any of the Following Travel Risk Services?



Assistance hotline to  
call in an emergency or  
unexpected event



**49%**

Yes

**38%**

No

**13%**

Don't  
know

Germany: n=245



**57%**

Yes

**36%**

No

**7%**

Don't  
know

United Kingdom: n=247



**65%**

Yes

**29%**

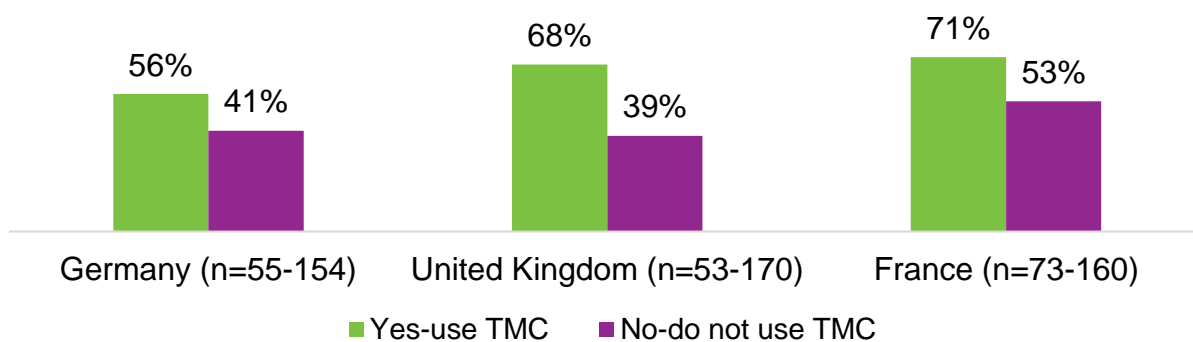
No

**6%**

Don't  
know

France: n=243

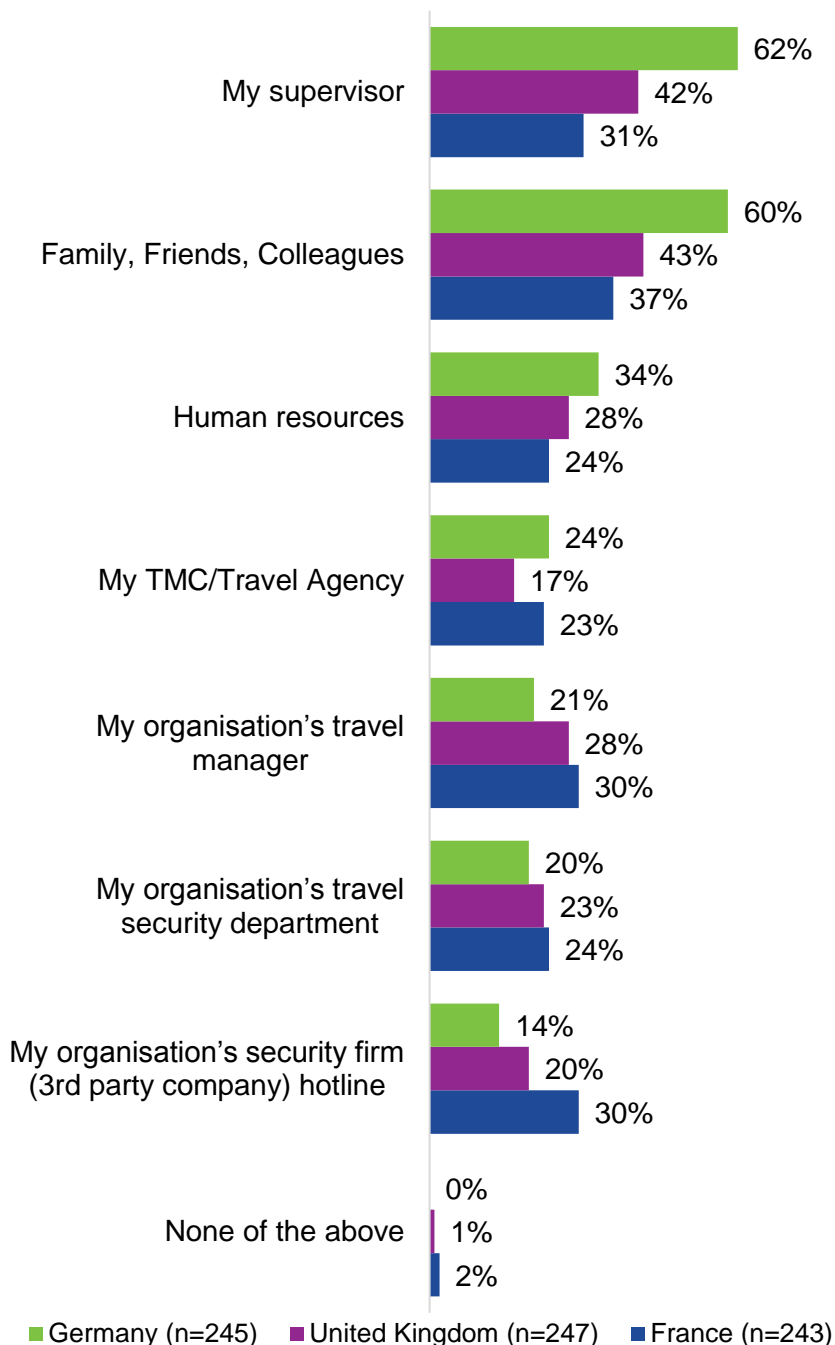
### Access to an Assistance Hotline % "yes" by use of TMC



When travellers do not have access to an assistance hotline, they can perhaps rely on other company resources to assist them in an emergency. Examples include their company's human resources or security department. Yet when asked whom they would call in an emergency, travellers most commonly indicate their *supervisor*, followed by *family*, *friends*, or *colleagues*.

In each country, only one-third of travellers or fewer would call *human resources* personnel. Similarly, even though about two-thirds of travellers say their organisation uses a travel management company (see p. 28), fewer than one-fourth would call their TMC in an emergency. Many travellers may not know that these resources can help them in an emergency. It is important that travellers know how to request help from their company – especially when they do not have access to an assistance hotline. Moreover, companies should offer travellers different ways to request assistance in an emergency and should communicate about these resources through different channels.

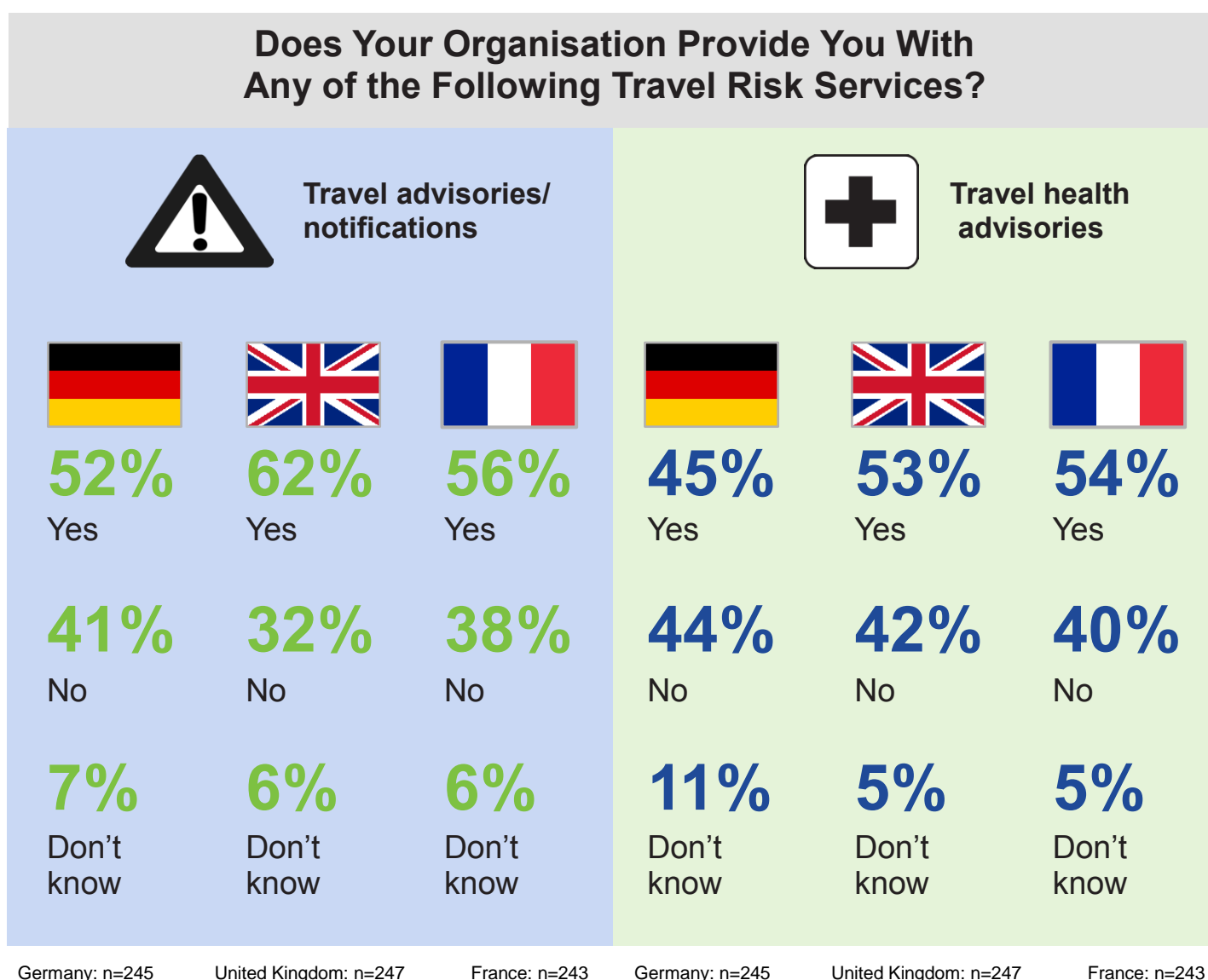
### Who would you call if you were in need of support/assistance due to an emergency or safety and security situation when on business travel?



## Travel advisories/notifications

A small majority of business travellers say their company provides *travel advisories/notifications*, while a similar share say it provides *travel health advisories*. Unsurprisingly, companies are much more likely to provide these when they use a TMC (see next page).

While advisories can help travellers, companies can only send them when they know where their employees are going. This can be difficult when employees book outside of company channels (see p. 7).

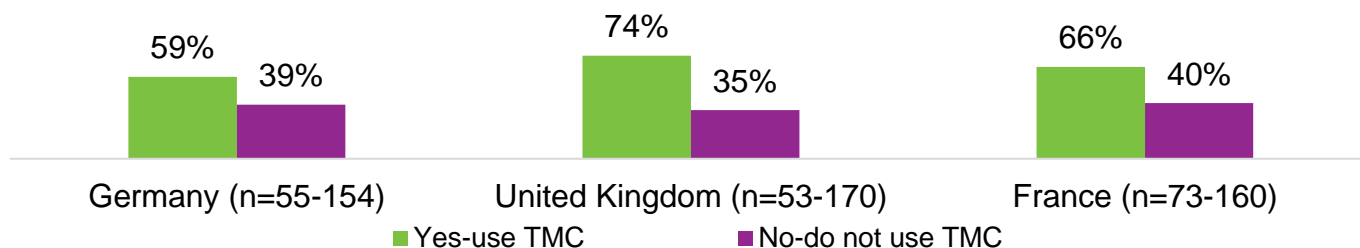




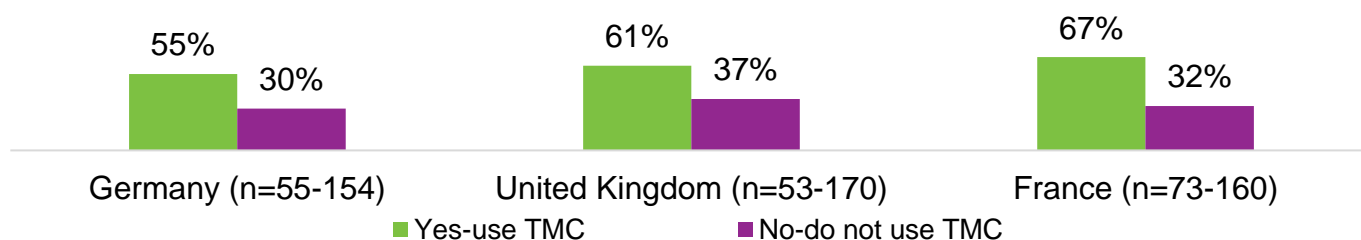
## Does Your Company Provide... % yes by use of TMC



### Travel Advisories/Notifications



### Travel Health Advisories



## SMS text alerts and communication

Companies may need to communicate with travellers to notify or assist them in an emergency. Yet fewer than three out of five business travellers say their company provides SMS (text message) alerts and communications when they are on the road. This capability is especially important in a mobile-first world in which employees can use smart phones to manage their schedules and communicate with each other. Employees might have a negative view of their travel programme if it lags behind the rest of their company when it comes to adoption of user-friendly technology.

*"We've got a lot of examples on where we've had to get people out of countries quickly because there's an uprising... Paris or Brussels... we've reached out to people within 30 minutes of a situation happening to check that they're OK. Do they need any support?"*

**-U.K.-based Travel Manager**

## Does Your Organisation Provide Any of the Following Travel Risk Services?



SMS text alerts and communication



**44%**  
Yes

**45%**  
No

**12%**  
Don't know



**55%**  
Yes

**38%**  
No

**7%**  
Don't know



**57%**  
Yes

**36%**  
No

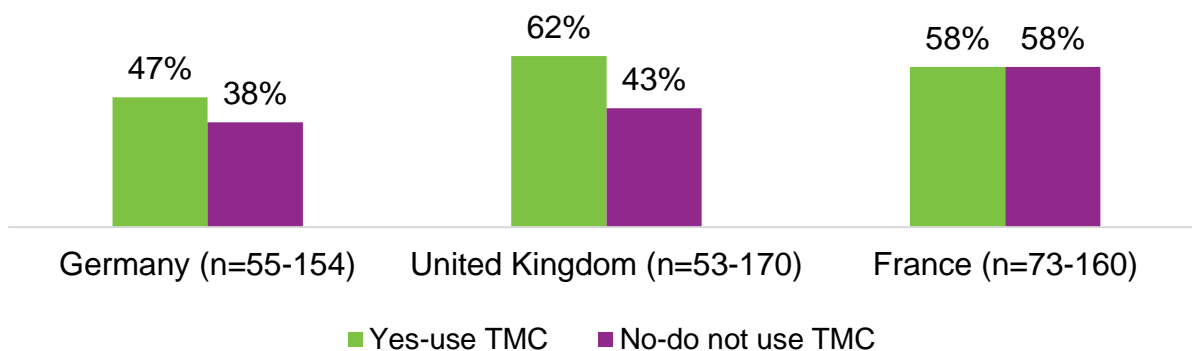
**7%**  
Don't know

Germany: n=245

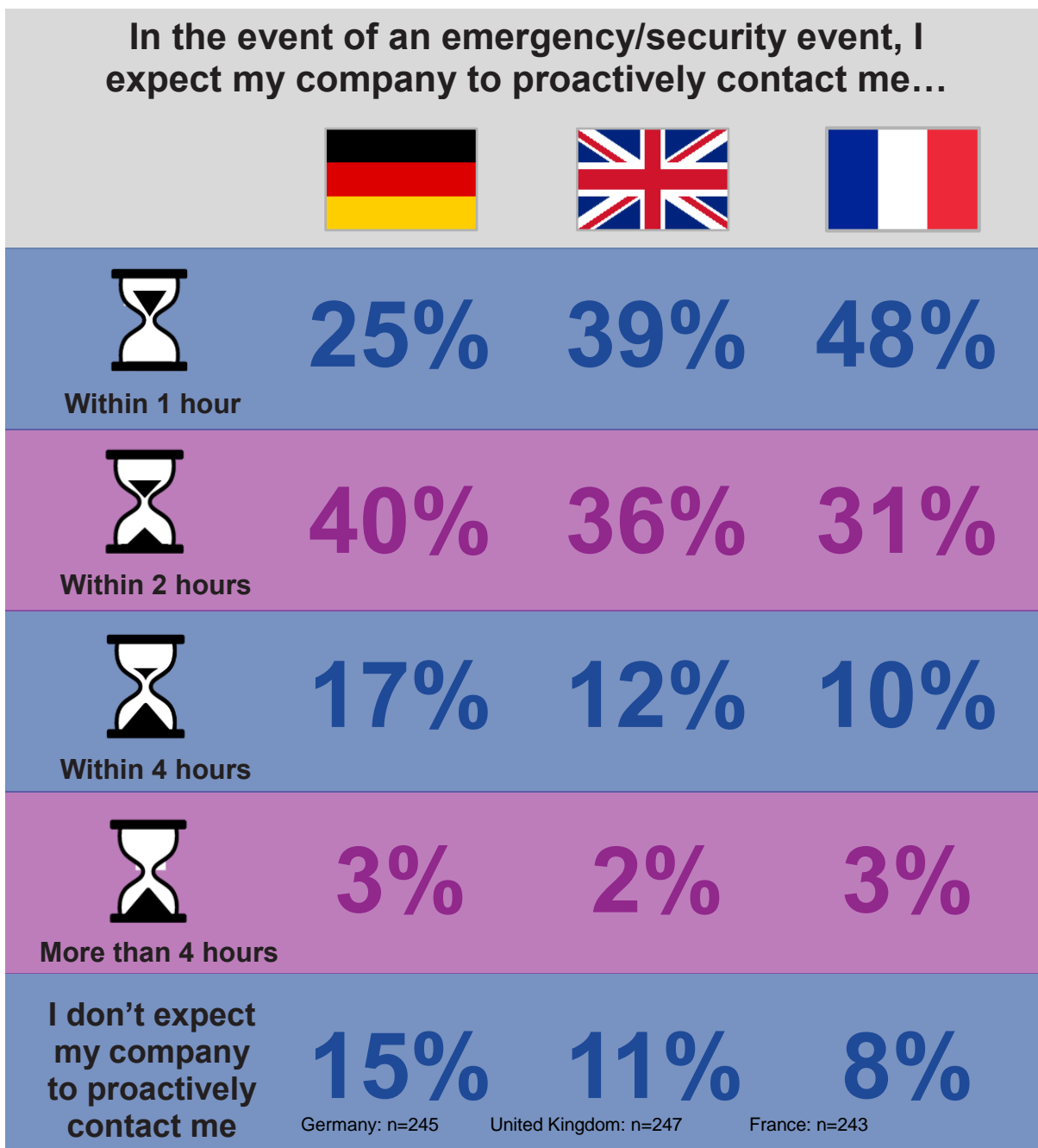
United Kingdom: n=247

France: n=243

## Access to SMS Text Alerts/Communication % "yes" by use of TMC



In an emergency or security event, business travellers would expect their company to proactively contact them. At least two-thirds of travellers in each country would expect their company to proactively contact them within two hours. While SMS and mobile apps can help companies reach large numbers of travellers quickly, these are useful only when (1) companies know where their travellers are located and (2) have up-to-date traveller profiles with accurate contact information.



*“Everybody, even the people that are going to a country like Germany, we will know exactly where they are and how long, etc. So we will always find people if something happens. For example, if something should happen in Paris or in Hamburg, we will know it. We will have all of the phone numbers to contact the families of the people, when it happens to be something where people are injured. And [our TMC] also sends us, very quickly after the accident or whatever, the list of people that are supposed to be in the country. And with this list, we go to the people and try to get in touch with them.*

**-France-based Travel Manager**

## Travel safety training

Traveller safety training represents a commonly overlooked component of risk management. Such training can cover a variety of topics – ranging from general safety tips, destination-specific information, and briefing about medical assistance or other resources available in an emergency. A key goal of this study was to examine this topic in greater detail. This section addresses three questions:

1. How many business travellers receive training?
2. What information do they receive in training?
3. Are travellers interested in customised training based on personal characteristics such as their gender, ethnicity, or sexual orientation?

### Does Your Organisation Provide Any of the Following Travel Risk Services?



Travel safety training



**36%**

Yes



**51%**

Yes



**40%**

Yes

**52%**

No

**45%**

No

**54%**

No

**11%**

Don't know

**5%**

Don't know

**6%**

Don't know

Germany: n=245

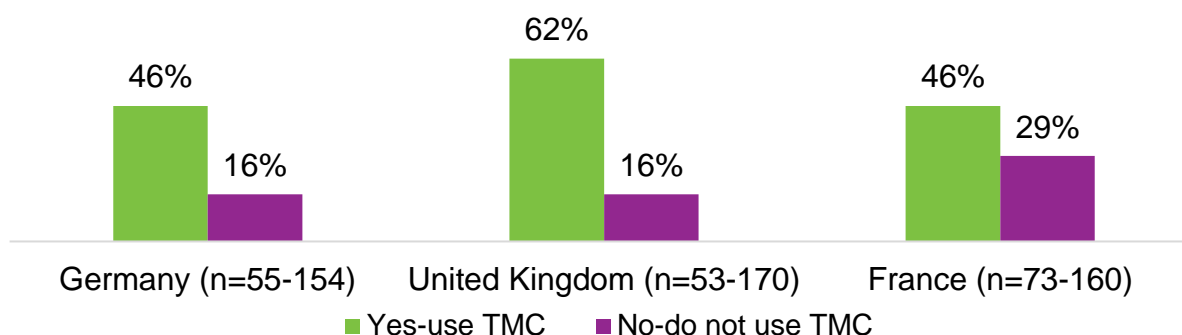
United Kingdom: n=247

France: n=243

More than half of respondents say their company provides *travel safety training*. This includes 49% in Germany, 57% in the United Kingdom, and 65% in France.

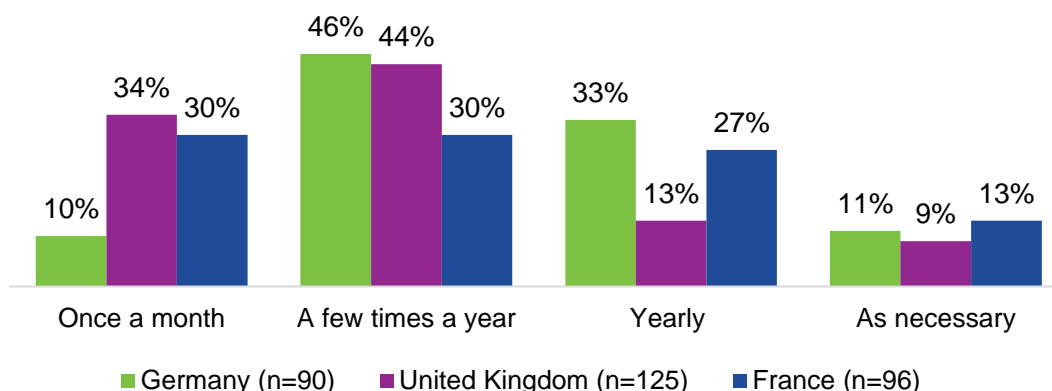
Companies are more likely to provide travel safety training when they use a TMC. This discrepancy appears to be slightly larger for training than it is for other services such as an *assistance hotline to call in an emergency or unexpected event* or *SMS text alerts and communication*.

### Does Company Provide Travel Safety Training? % “yes” by use of TMC



Of the travellers who say their company provides safety training, a large majority would prefer to receive it more than once annually.

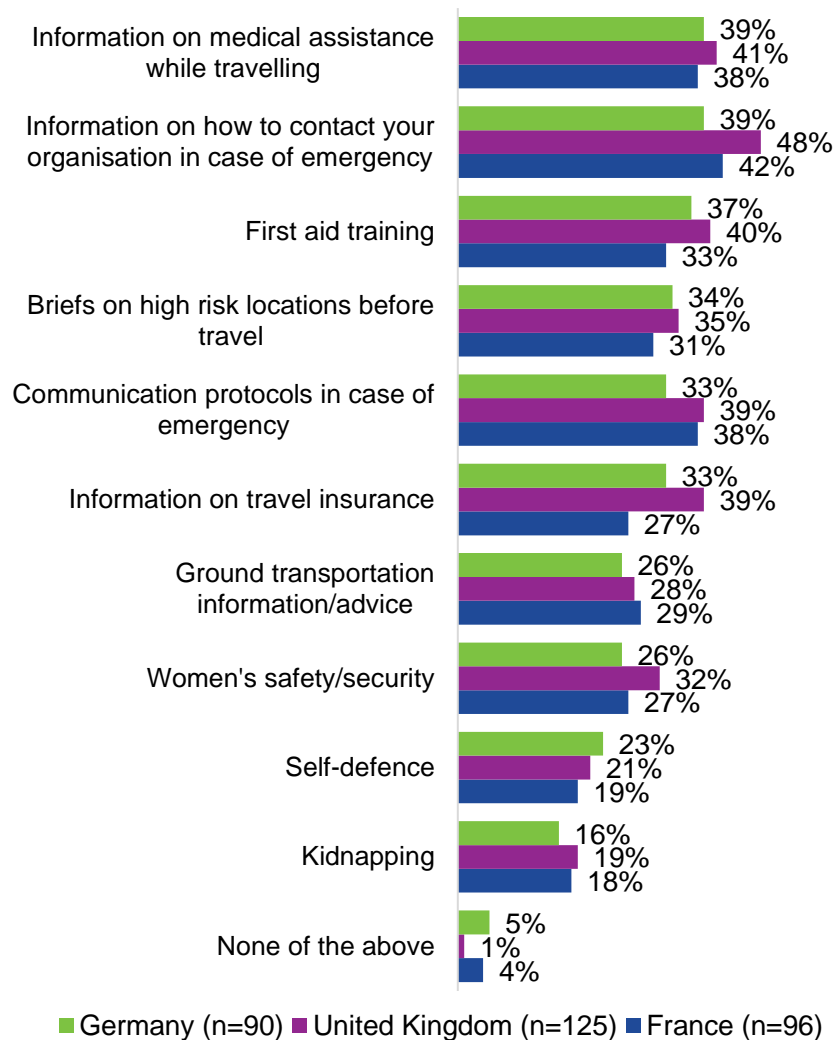
### How Often Do Business Travellers Want to Receive Travel Safety Training? -among those who say their company offers training



Note: Question only displayed to respondents who indicated that their organization provides travel safety training.

When business travellers say their company provides training, they indicate receiving training on a variety of topics. The most commonly indicated are *information on medical assistance while travelling, information on how to contact (their) organisation in an emergency, and first aid training*. It is critically important that companies provide travellers with information on how to access medical assistance or contact their company in an emergency. As shown earlier, when faced with an emergency, many travellers would call their supervisor, friends, or colleagues—people who are unlikely to provide the most effective assistance.

## Types of Training Received in the Past



*"[Our travellers] get pre-trip advice before they travel... That gives them anything from details in the country they're travelling to, what the risk level is, what to do if they have any issues while they're away, who to contact."*

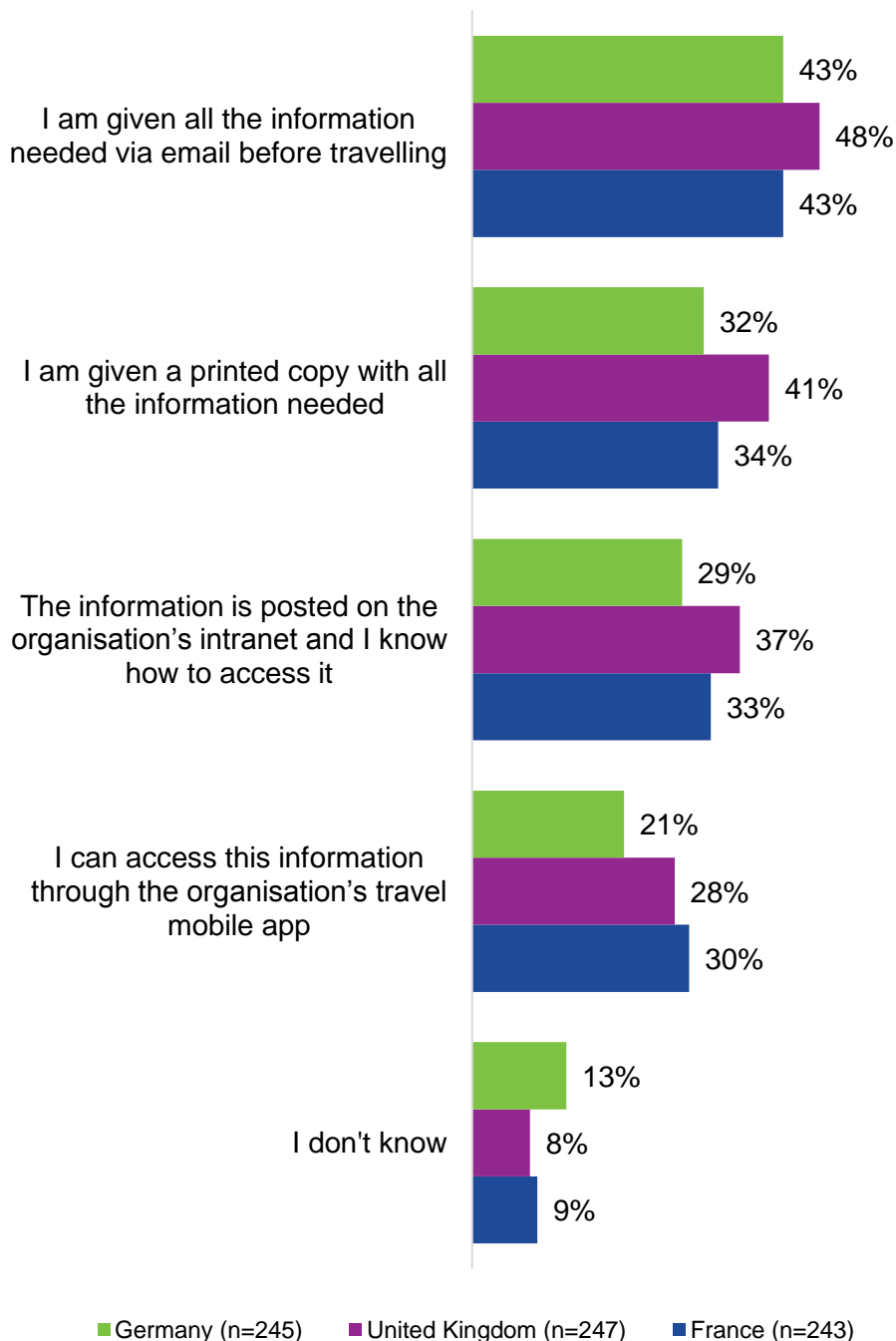
**-U.K.-based Travel Manager**

Note: Question only displayed to respondents who indicated that their organization provides travel safety training.

While most travellers expect their company to proactively contact them in an emergency (see p. 19), employees frequently need to request assistance on their own initiative. While companies can proactively reach out in a natural disaster or security event, how will they know when a traveller suffers a medical emergency? It is critically important that companies communicate to travellers about how to access the resources available to them.

When asked how their companies communicate about these resources, travellers paint a mixed picture. They most commonly say they *are given the information needed via email before travelling*. However, fewer than half of travellers in each country indicate this option. Travel programmes should disseminate information through multiple channels to maximize the likelihood that employees will see it.

## How does your company ensure you have access to assistance in case of emergency?



Business travellers can face unique challenges depending on their gender, ethnicity, sexual orientation, or religion. Customised training or resources might help them deal with these challenges. Between one-third and one-half of travellers say they would have benefitted from such training in the past year.

### Thinking of all the business trips that you took in the past year, would you have benefitted from any of the following?\*

- Training or resources for women travellers
- Training or resources for LGBT travellers
- Training or resources for minority travellers
- Training or resources to help travellers observe religious customs while travelling



39%

Yes



48%

Yes



36%

Yes

**\*Respondents who did not indicate “yes” indicated either “no” or “not sure”**

Germany: n=245

United Kingdom: n=247

France: n=243

Similarly, almost half of business travellers would have benefitted from training tailored to their destination in the past year (see next page). This training may be especially valuable in a world of heightened geopolitical uncertainty.





## Thinking of all the business trips that you took in the past year, would you have benefitted from any of the following?

- Training or information about a particular destination's culture
- Training or information about a particular destination's religious customs
- Training or information about a particular destination's laws or legal system



47%

Yes



54%

Yes



44%

Yes

**\*Respondents who did not indicate "yes" indicated either "no" or "not sure"**

Germany: n=245

United Kingdom: n=247

France: n=243

For many companies, safety training can pose challenges. Global companies may have thousands of employees who work in different locations and speak different languages. In addition, Travel Managers and HR personnel may not have necessary subject expertise. It can be difficult, moreover, to identify the most important information, and to provide customised training to specific groups or about specific destinations – even though many travellers want such training. To overcome these challenges, travel programmes should explore ways to leverage technology—such as webinars or on-demand videos—or consider investing in off-the-shelf products.

*"I think [training] would be very challenging for us. We certainly can't do it on site because we're in hundreds of locations in the world. It just wouldn't be cost effective. We could potentially do online training scenarios, but it would be difficult to target what that would be for...And what would that cover? I'm not too sure that we would be able to tailor that to everyone's specific needs."*

**-U.K.-based Travel Manager**

## GPS tracking

More than one-quarter of respondents say their company provides *GPS tracking of travellers*. When enabled, this allows companies to locate business travellers in real-time. While a decent share of companies *provide* this service—likely through a TMC or travel safety app—it is unclear *how many travellers actually use* this service.

Adoption of GPS tracking is higher at companies that use TMC services (see below).

### Does Your Organisation Provide Any of the Following Travel Risk Services?



#### GPS tracking of travellers



**29%**

Yes

**59%**

No

**12%**

Don't know



**34%**

Yes

**61%**

No

**5%**

Don't know



**28%**

Yes

**67%**

No

**5%**

Don't know

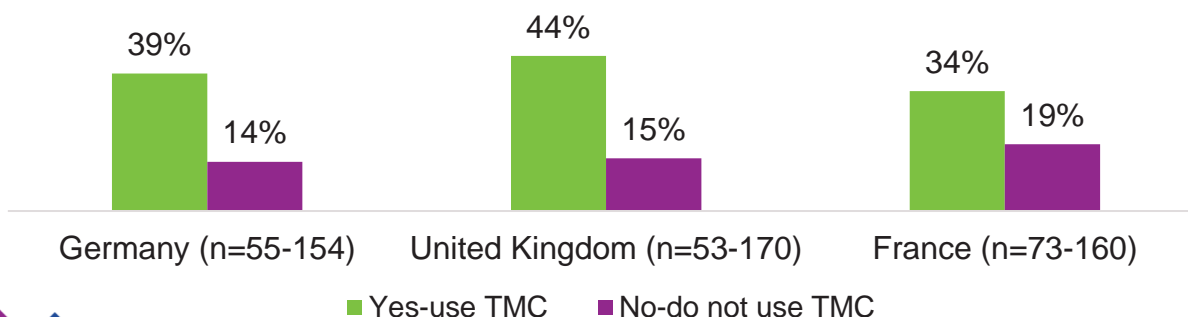
Germany: n=245

United Kingdom: n=247

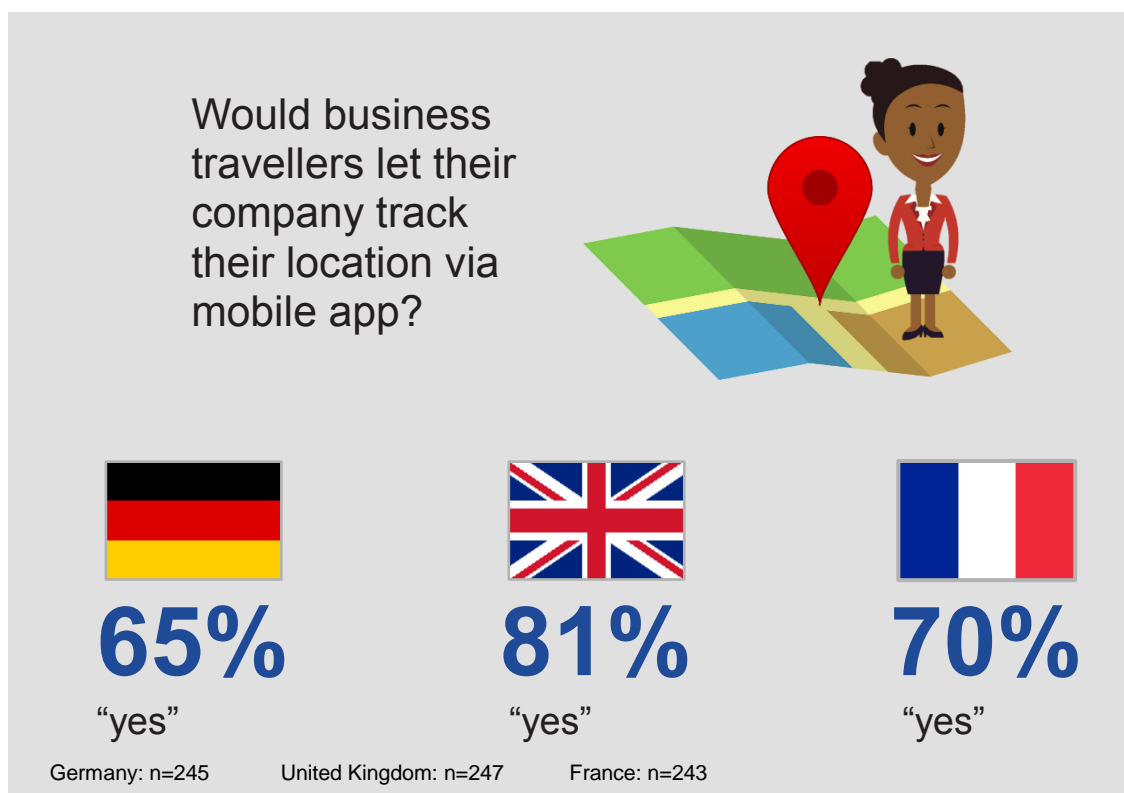
France: n=243

### Does Your Company Provide GPS Tracking of Travellers?

% "yes" use of TMC



Even though most companies do not currently use GPS tracking, a majority of travellers would let their company track them via a mobile app “should they need to reach (them) in the event of a security or weather related issue.” Yet even when travellers are willing, European companies may be reluctant to use GPS tracking because of data privacy concerns. When compared to the U.S., some Western European countries have much higher data privacy standards. To overcome these concerns, companies might rely on technology that allows them to predict a traveller’s location based on their profile or itinerary information.



*“We track [travellers] by their booking. We don’t track them by their mobile device, absolutely not. I think that’s an HR minefield, tracking people by their mobile devices. Because some people may not be where you want them to be. They could be in places where they don’t want people to know where they are. I know some people who track travellers by their credit card as well. We actually don’t do that, for the same reason...We would have to have some very uncomfortable conversations with our travelling community if they thought we were tracking them by their mobile device.”*

**-U.K.-based Travel Manager**

## Conclusion

1. **Booking data plays critical role in duty of care.** It enables companies to locate travellers in an emergency; send routine advisories and notifications; ensure that high-risk trips receive proper approval; and identify travelers who need special training or information, among other things.

In the past year, a majority of travellers booked a business trip through a corporate online booking tool when they had access to one. However, seven out of 10 booked at least one trip directly with a supplier or through an OTA, even though they had OBT access.

**Such bookings can hinder duty of care. Companies should make sure they have appropriate policies or technology in place to capture or prevent bookings made outside of their own channels.** For most companies, a one-sided approach—which relies exclusively on strengthening their travel policy or adopting technology to capture outside bookings—is likely insufficient. Yet a combination of strategies can help companies achieve high compliance while capturing bookings that are inevitably made outside of their travel programme.

2. **Some respondents say they do not have access to key risk management services that “managed” travel programmes would commonly provide.** This means that (1) some travellers are not part of a fully managed programme<sup>8</sup> and (2) others may be unaware of the services available to them. **To maximize awareness, travel programmes should communicate about available resources through multiple channels such as email, SMS, mobile apps, and booking tools.**

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<sup>8</sup> Respondents qualified for this survey only if their company had a travel policy. However, this does not mean their company had a fully managed programme. For instance, in each of the three countries, at least one-third of travellers say their organisation does not use a travel management company (TMC) for any product or service, or do not know if it uses one (see p. 31).




## Works Cited

GBTA Foundation, *Booking Behaviour II: A Survey of Business Travellers in Germany, the United Kingdom, and France*. Alexandria, VA: GBTA Foundation, 2017.

GBTA Foundation, *Booking Behaviour – The Business Traveller’s Perspective: A Survey of Business Travellers in Germany, the United Kingdom, and France*. Alexandria, VA: GBTA Foundation, 2017.



## Respondent Profile<sup>9</sup>

Respondent Demographics			
			
<b>Gender</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
Male	57%	55%	57%
Female	43%	45%	43%
<b>Age</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
20 to 24	9%	10%	6%
25 to 34	19%	22%	21%
35 to 44	21%	21%	25%
45 to 54	27%	20%	25%
55 to 64	20%	18%	19%
65 or over	4%	9%	5%
<b># of Employees at Company<sup>10</sup></b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
Less than 1,000	25%	26%	24%
1,000 to less than 3,000	27%	31%	27%
3,000 or more	46%	41%	48%
<b>Employment Status</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
Full-time	93%	90%	94%
Part-time	7%	10%	6%
<b>Number of Business Trips in Past Year</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
2 to 5	62%	60%	60%
6 to 11	21%	25%	25%
12 or more	17%	14%	14%
<b>Types of Business Travel Destinations in the Past Year</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
Domestic	70%	69%	65%
International within Europe	61%	63%	58%

<sup>9</sup> Note: All percentages shown are after weighting.

<sup>10</sup> Note: One percent of business travelers in each country are "not sure" of their company size (not shown in table).

International long-haul	21%	25%	21%
All of the above	7%	8%	10%
<b>Company's Travel Policy</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
I am required to follow my company's published and enforced travel policies	53%	50%	44%
I am encouraged to follow general guidelines	40%	47%	52%
My company has a travel policy, but I don't know what it is	6%	3%	5%
<b>Does Your Organisation Use a TMC for Any Product / Service?</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
Yes	63%	68%	66%
No	22%	21%	30%
Not sure	14%	11%	4%
<b>Has Organisation / TMC Given You the Option to Book Using a Corporate Online Booking Tool in Past Year?</b>	<b>(n=243)</b>	<b>(n=250)</b>	<b>(n=243)</b>
Yes	60%	56%	68%
No	30%	29%	28%
Not sure	10%	15%	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](http://gbta.org) and [gbta.org/foundation](http://gbta.org/foundation).

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For more than two decades, Concur, an SAP company, has taken companies of all sizes and stages beyond automation to a completely connected spend management solution encompassing travel, expense, invoice, compliance and risk. Our global expertise and industry-leading innovation keep our customers a step ahead with time-saving tools, leading-edge technology and connected data, in a dynamic ecosystem of diverse partners and applications. User-friendly and business-ready, Concur unlocks powerful insights that help businesses reduce complexity and see spending clearly, so they can manage it proactively.