HOW TECHNOLOGY IMPACTS TRAVELLER BEHAVIOUR AND SAFETY

In partnership with:
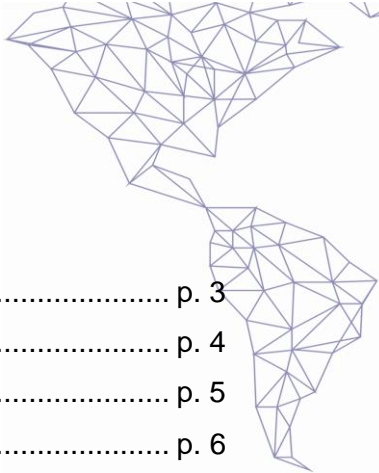
SAP Concur

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Introduction

Corporate travel is an ever-changing environment, with travel managers' responsibilities now lying beyond travel management to include risk management and traveller satisfaction. Technology is critical in managing this landscape, as in recent years, travel managers have been working with booking providers to expand the content available through corporate channels to ensure the capture of traveller data. Nevertheless, business travellers continue to book outside of corporate channels, creating significant challenges in capturing all traveller data, maintaining savings from negotiated rates, and fulfilling traveller safety responsibilities.

Over the past four years, GBTA has partnered with SAP Concur to explore business traveller booking behaviour and preferences, and how booking behaviour affects the moral and legal responsibility of duty of care. This study aims to examine this topic in greater depth, looking at the ways in which technology can play a role in traveller booking behaviour and, in turn, keep travellers safe. It focuses on four main aspects:

1. **Traveller booking methods:** How do travellers typically book their business travel? Under what circumstances will they book outside of corporate booking channels?

2. **Booking channel relationship to traveller safety:** Do organisations have the resources in place to keep travellers safe, even if they book through non-corporate channels?

3. **Travellers' expectations of duty of care:** What are traveller expectations of duty of care? Are organisations prepared to meet these expectations? How does bleisure impact traveller safety?

4. **Technology's role in traveller safety:** What technological innovations would motivate travellers to book through corporate channels? Are travellers willing to share personal data in exchange for a more personalised, and more efficient, business travel experience?

Before jumping into the key aspects of the reports we'll take a look at key findings and report methodology.

Key Findings

- **Many travellers continue to book through alternative channels, causing major concern for travel managers as they might not have a way to capture traveller data otherwise.** A majority of business travellers book their air or hotel directly with suppliers or through an online travel agency (OTA), yet less than half indicate their organisation has a way to capture traveller data if they book outside of corporate channels. This lack of visibility has critical implications for both travel spend and duty of care.

- **Travellers have high expectations of their organisation when it comes to their safety.** The majority of travellers expect their organisation to proactively contact them within two hours of an emergency. However, proactive communication is only feasible when companies know where their travellers are located and have up-to-date information, which many companies might not have when travellers book outside corporate channels.

- **Travellers value both efficiency and duty of care components in company tools.** Considering the high expectations that their organisation takes their safety seriously while travelling for work, it comes as no surprise that travellers want to see safety-related features such as emergency support and safety notifications in their company resources.

- **Most travellers want booking tools that are personalised and efficient. However, travellers' preferences might conflict with traditional travel management best practices.** One-third of business travellers say efficiency is the number one priority in using their company's booking tool, and in looking towards the future, many business travellers want to have personalised booking experiences. However, if travellers regularly book with non-preferred suppliers,

companies will need technology to offer personalised results that are in-policy
and provide ways to capture all traveller data.

- **Travellers are willing to share personalised data in exchange for the
  efficient and personalised experiences they desire.** Many business
  travellers are willing for their booking tool to use personal data such as age,
  contact information, and travel preferences in order for personalised
  experiences. However, the General Data Protection Regulation (GDPR)
  requires travel programs to be transparent in their use of this data.

Methodology

- A survey was conducted of 1,252 business travellers in Germany (152), France
  (151), the UK (152), the Nordics[1] (513), Belgium (155) and the Netherlands[2]
  (129) using an online panel. The survey fielded between September 21, 2018
  and October 16, 2018. Respondents qualified if they (1) were employed full-time
  or part-time, and (2) traveled for business more than once in the past year[3].

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

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[1] **Nordic countries surveyed include Denmark, Finland, Norway, and Sweden.**
[2] **For the purposes of analysis, Belgium and the Netherlands have been combined.**
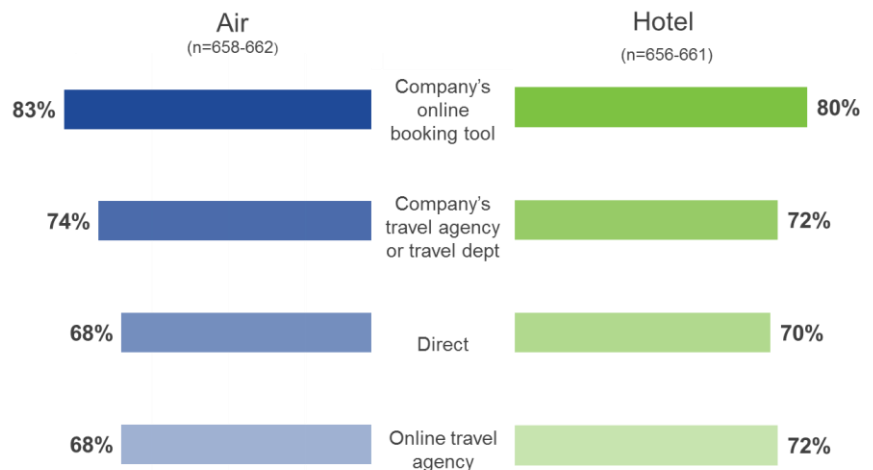[3] **In previous years, an additional qualifier existed in which travellers had to work for a company that a)
required them to follow published and enforced travel policies or b) encouraged them to follow general
guidelines for travel. While this qualifier remained for previously surveyed countries (France, UK, and
Germany), this restriction was lifted in the Nordic countries, Belgium, and the Netherlands.**

Traveller Booking Methods – Past, Present and Future

- **Over two-thirds of travellers book outside of corporate channels, despite having access to an online booking tool (OBT).** In the past year, over 80% of European travellers used their company's online booking tool to book air (83%) and hotel (80%), making OBT use relatively consistent over the past two years. However, over two-thirds of business travellers book air directly (68%) or through an OTA (68%), and seven in ten book their hotels directly (70%) or through an OTA (72%). Furthermore, over the past three years, rates of OTA use increase on more occasions than those of OBT use, which might indicate that alternative channel use might continue to increase. These alternative channels might offer more convenience, selection, and better prices, making them appealing to travellers. However, in many cases, non-corporate channels are not authorized booking channels within a company's travel policy, causing significant leakage and traveller safety concerns.

How Often Travellers Book

% who say "in some situations" or more

	Air (n=658-662)		Hotel (n=656-661)
Company's online booking tool	83%		80%
Company's travel agency or travel dept	74%		72%
Direct	68%		70%
Online travel agency	68%		72%

*of those who had access to an OBT

Air Booking Methods

	Total			France			Germany			UK			DK/ FI/ NO/ SE	BE/ NL
	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2018	2018
OBT	92%	84%	83%	92%	87%	87%	92%	81%	82%	91%	84%	82%	78%	86%
Travel Agency/ Dept	66%	82%	74%	67%	84%	73%	62%	81%	74%	69%	83%	74%	67%	79%
OTA	61%	78%	68%	60%	81%	70%	60%	73%	64%	63%	81%	67%	66%	76%
Direct	67%	79%	68%	65%	82%	67%	63%	70%	57%	72%	86%	78%	64%	80%

Hotel Booking Methods

	Total			France			Germany			UK			DK/ FI/ NO/ SE	BE/ NL
	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2018	2018
OBT	92%	83%	80%	92%	82%	83%	92%	81%	76%	91%	87%	83%	72%	84%
Travel Agency/ Dept	66%	80%	72%	67%	82%	70%	62%	75%	74%	69%	83%	73%	62%	79%
OTA	61%	77%	72%	60%	76%	68%	60%	74%	68%	63%	83%	79%	70%	79%
Direct	78%	83%	70%	87%	86%	73%	74%	76%	58%	72%	86%	78%	63%	80%

- **Booking alternative channels is common despite mandated policies.**
  On average, two-thirds of travellers with mandated policies book business travel through alternative channels. While numbers are slightly higher for those with less restrictive policies, the fact remains that a majority of travellers with mandated policies still book through alternative channels, indicating that stricter policies might not control for out-of-policy bookings.

Direct Bookings

Hotel: Mandated Policy 64%, Guidelines 76%
Air: Mandated Policy 64%, Guidelines 73%

■ Mandated Policy (n=321)
■ Guidelines (n=277)

OTA Bookings

Hotel: Mandated Policy 67%, Guidelines 76%
Air: Mandated Policy 63%, Guidelines 70%

■ Mandated Policy (n=325)
■ Guidelines (n=274)
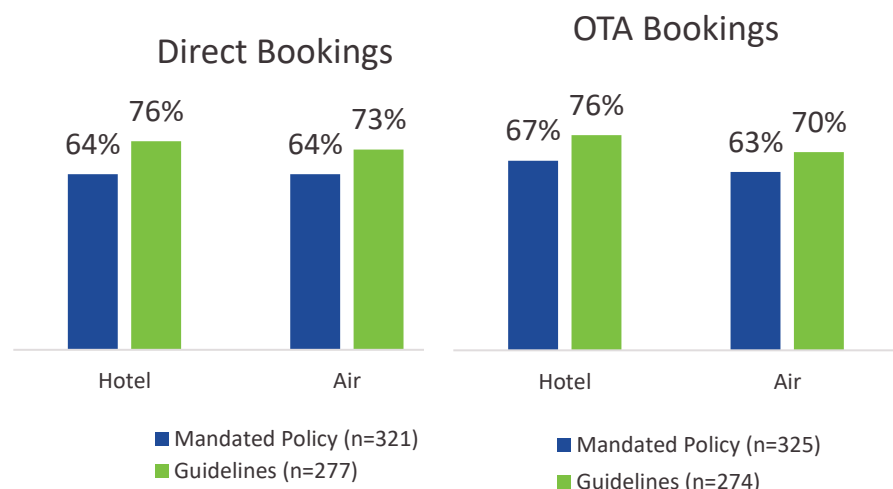
- **Travellers' predictions do not necessarily reflect traveller behaviour.**

  Business travellers were asked which booking methods they anticipated using in the next year. Nearly half (47%) of business travellers[4] say they expect to use their online booking tool more often in the next year. However, over one-third of travellers expect to use online travel agencies (40%) and direct bookings (37%) more in the next year as well. Since 2016, it seems that travellers are optimistic in the projections of their booking method use. While business travellers in the UK, Germany, and France accurately predicted an increase in OTA and direct bookings in 2016, travellers have consistently been over-optimistic in their predictions with booking through corporate channels. Therefore, while more travellers say they will be using corporate channels more often, the trend of travellers using alternative channels to book is unlikely to end, and travel managers should plan accordingly.

Booking Method Use

among business travellers who had OBT access

	2016 Actual Use	2016-2017 Projected Increase	2017 Actual Use	2017-2018 Projected Increase	2018 Actual Use	2018-2019 Projected Increase
OBT	**92%**	23%	**84%**	42%	**82%**	47%
Travel Agency/ Dept	**66%**	N/A	**81%**	26%	**73%**	35%
OTA	**61%**	23%	**78%**	35%	**69%**	40%
Direct	**78%**	31%	**81%**	29%	**69%**	36%

"projected increase" refers to the percentage of travellers who say they will use the specified booking method "more often" in the next year

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[4] **Average calculated from travellers in the UK, Germany, and France**

- **Travellers continue to book outside of corporate channels, mainly for pricing and convenience.** In recent years, booking providers have made an effort to expand the content available through corporate channels. Many have partnered with consumer aggregators to display hotel and accommodation offers that may also be available on consumer websites such as Airbnb and Booking.com. Nonetheless, in the past year, more than half (52%) of European travellers who booked through an online travel agency (OTA) did so for better prices while almost half (49%) did so for better selection. Two out of five (44%) who booked through direct channels did so for better prices while an identical share did so for more selection (44%). These are similar to the percentages obtained in past years.
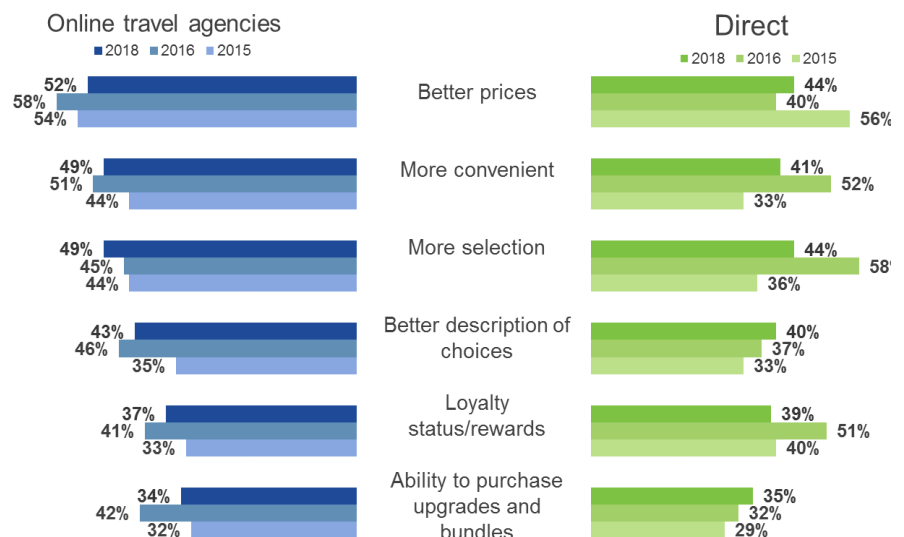
Moreover, travel suppliers continue to advertise extra loyalty benefits or rewards when customers book through direct channels. In the past year, two out of five (39%) European travellers who booked a work trip through direct channels mention "loyalty status/rewards" as a reason why they did so. Some OTAs have their own rewards programs – which may explain why 37% also mention loyalty as a reason for booking with an OTA.

Reasons Travellers Booked Outside of Corporate Booking Channels

among business travellers who had OBT access

Online travel agencies
■ 2018 ■ 2016 ■ 2015

Direct
■ 2018 ■ 2016 ■ 2015

	Online travel agencies				Direct		
	2018	2016	2015		2018	2016	2015
Better prices	52%	58%	54%		44%	40%	56%
More convenient	49%	51%	44%		41%	52%	33%
More selection	49%	45%	44%		44%	58%	36%
Better description of choices	43%	46%	35%		40%	37%	33%
Loyalty status/rewards	37%	41%	33%		39%	51%	40%
Ability to purchase upgrades and bundles	34%	42%	32%		35%	32%	29%

Booking Channel Relationship to Traveller Safety

When booking outside of corporate channels, travel managers might not always have visibility into traveller behaviour and safety, making it difficult to fulfill duty of care responsibilities and ensure traveller safety. While better pricing and convenience might be appealing to travellers, booking through non-corporate channels can significantly hinder the ability for travel buyers to capture traveller data. In fact, a recent GBTA study found that 80% of travel buyers don't use technology to capture outside bookings[5]. While seemingly saving money to the traveller, booking cheaper rates through non-corporate channels can be costlier in the long run as a) travel buyers are unable to capture data to leverage the volume that isn't tracked and b) travellers are unable to receive negotiated rates when booking direct. Additionally, booking outside of corporate channels can create significant problems related to traveller safety. These issues are heightened when organisations might not always have processes in place to capture traveller data when they book outside of corporate channels (see next page).

[5] **Lost in Translation: Changing Landscape, Familiar Challenges. GBTA, 2018.**

o Just under half (47%) say their organisation has a system in place that captures their travel plans when they book with an OTA or directly with a supplier, which remains unchanged since last year (47%). With the exception being a majority of travellers in the UK (54%), Belgium, and the Netherlands (59%), that still leaves over half of travellers who do not say their organisation has a system in place. This is compounded by the fact that two in ten (21%) business travellers do not think their organisation has the ability to capture travel plans.

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

My organisation has a system in place that captures my travel plans
- 47%
- 35%
- 47%
- 54%
- 46%
- 59%

The only way for my organisation to know where I travelled is through my expense report
- 45%
- 53%
- 38%
- 42%
- 37%
- 55%

I have to forward my itinerary to someone in my organisation
- 38%
- 33%
- 38%
- 37%
- 38%
- 51%

I don't think they are able to capture my travel plans
- 21%
- 23%
- 23%
- 19%
- 22%
- 19%

■ Total (n=622)
■ France (n=160)
■ Germany (n=166)
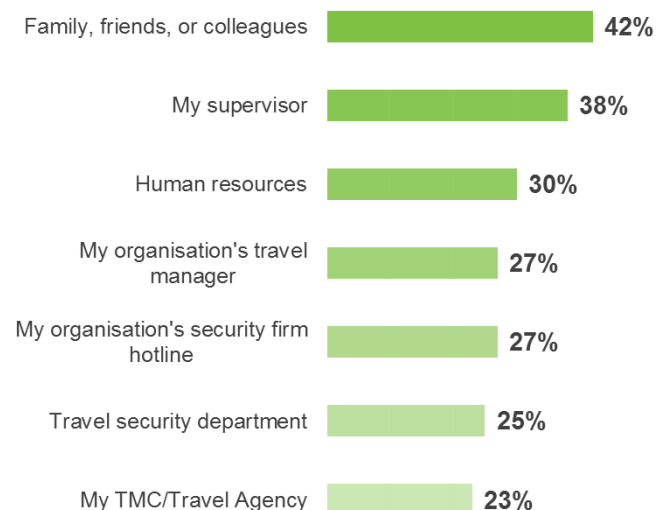■ United Kingdom (n=174)
■ Nordics (n=55)
■ BE/NE (n=67)

- o Nearly half (45%) of business travellers say that the only way for their organisation to know where they travelled is through their expense report, including over half of travellers in France (53%) and Belgium and the Netherlands (55%). While expense data may give travel programmes spend visibility after the trip has occurred, it does not necessarily help with traveller safety concerns that arise during a trip. This can create some friction as many travellers expect their organisation to promptly and proactively contact them in case of emergency during business trips (see next page).

- o Over one-third (38%) of companies expect their travellers to manually forward their itinerary to someone in their organisation. This is also not a complete solution as travellers may forget to forward their itinerary, or change their travel plans at the last minute and forget to forward their updated itinerary. Therefore, travel managers need a better way to capture complete, accurate information of all travellers on business trips in order to fulfill duty of care responsibilities.

Travellers' Expectations of Duty of Care

- **No matter how travel is booked, travellers expect their organisation to be proactive in duty of care.** Over eight in ten (82%) business travellers think it is important for their organisation to know about their plans ahead of time, both because it is more cost effective (43%) and it can better guarantee their safety when traveling for work (38%)

    o Nearly three-quarters (73%) of travellers expect their company to proactively contact them within 2 hours of an emergency or security event, which can be difficult if employees book outside of company channels and/or if plans are not known ahead of time. This expectation has remained unchanged since last year (73%), meaning travellers' still heavily rely on their organisation's proactive communication for their safety. Moreover, with the exception of calling their supervisors (38%), on average three-quarters of business travellers did not indicate they would contact a member of their organisation if they were in need of assistance, leaving the responsibility solely on the organisation. Yet in reality, this expectation might not be met: nearly one-third (34%) of travel buyers say they do not know how long it would take them to contact the travellers in case of emergency[6].

Who would travelers call if they were in need of assistance on a business trip?

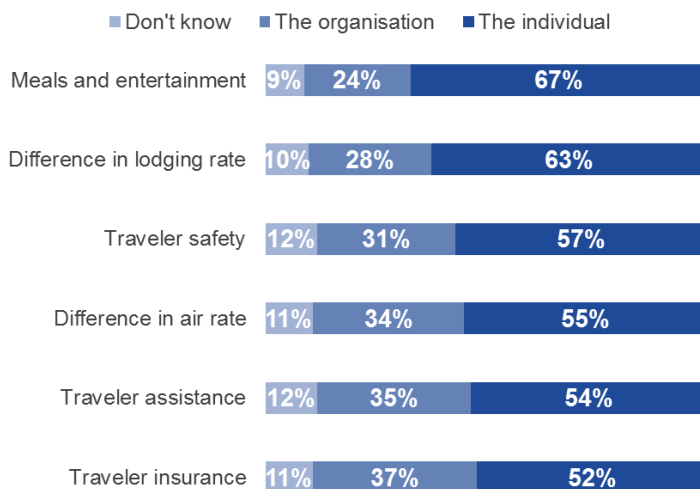|	
Family, friends, or colleagues	**42%**
My supervisor	**38%**
Human resources	**30%**
My organisation's travel manager	**27%**
My organisation's security firm hotline	**27%**
Travel security department	**25%**
My TMC/Travel Agency	**23%**

[6] **Lost in Translation: Changing Landscape, Familiar Challenges. GBTA, 2018.**

Therefore, it is critical for organisations to proactively know where their travellers are, particularly in high-risk areas, which can be leveraged through technology in the booking process.

- **Even on leisure days added to business travel, travellers expect organisations to be involved in keeping them safe.** Over half (56%) of business travellers extended their business trips into personal or leisure time in the past year.

  o For those that did take "bleisure", 40% say that they encountered issues during these added leisure days and that their company helped resolve the problems, including over half (57%) of travellers in the United Kingdom.

Who is responsible for the following during added leisure days?
(n=740)

- Don't know
- The organisation
- The individual

	Don't know	The organisation	The individual
Meals and entertainment	9%	24%	67%
Difference in lodging rate	10%	28%	63%
Traveler safety	12%	31%	57%
Difference in air rate	11%	34%	55%
Traveler assistance	12%	35%	54%
Traveler insurance	11%	37%	52%

o While over half of travellers generally see themselves as responsible for expenses and safety on added leisure days, between 24 – 37 % expect the organisation to be responsible for these aspects, and around one in ten do not know who is responsible. Moreover, when it comes to issues of duty of care, travellers in Belgium and the Netherlands are particularly likely to place responsibility on the organisation, as nearly half believe the organisation is responsible for traveller assistance (42%) and traveller insurance (42%). Even though companies routinely provide safety-related services to their travellers, they may not automatically provide these for the leisure portion of the trip. With the expectation that organisations will be proactive in traveller safety, even on leisure days, it

is critical for organisations to have resources in place to capture traveller data and keep them safe, and to educate travellers about which resources are available on leisure days.

- **Most business travellers report their organisations having resources in place to keep them safe on business trips.** While the expectation is high for organisations, most business travellers report having access to resources and tools that keep them safe, and travellers in the UK, Belgium, and Netherlands report higher than average access to these resources. However, considering the lack of visibility organisations might have for all travellers, there is still opportunity for providing technology to make booking through corporate tools more appealing and, in turn, allow for transparent and safe business trips.
  - o Less than half (47%) of travellers report receiving travel safety training, which can proactively keep travellers safe if their organisation is unable to reach them during their trip. However, compared to last year (42%), most markets have seen slight increases in reports of safety training.
  - o Just over one-third (36%) of travellers report their organisation has GPS tracking capabilities. While numbers appear to be increasing across markets, lack of GPS tracking still leaves duty of care responsibilities reliant on the organisation knowing traveller plans ahead of time.
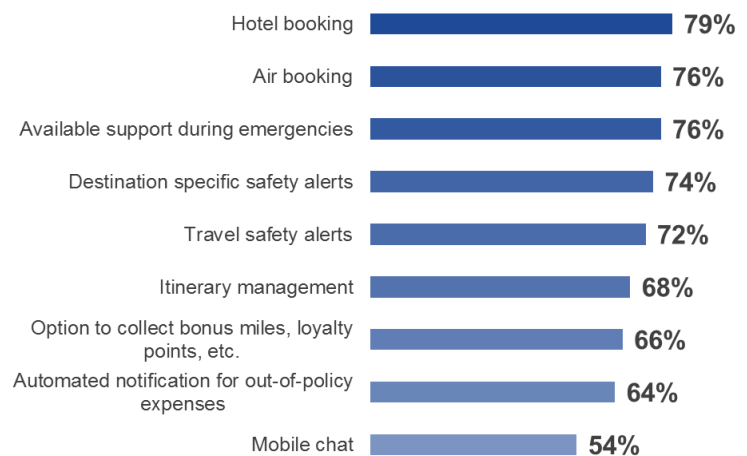
Resources Available to Travellers

	Total		France		Germany		UK		DK/FI/NO/SE	BE/NL
	2017	**2018**	**2017**	**2018**	**2017**	**2018**	**2017**	**2018**	**2018**	**2018**
Assistance/Emergency hotline	57%	62%	65%	62%	49%	57%	57%	70%	50%	67%
Travel notifications	57%	58%	56%	52%	52%	64%	62%	59%	43%	61%
Travel health advisories	51%	55%	54%	55%	45%	51%	53%	61%	49%	58%
Access to an online assistance website	53%	52%	56%	46%	48%	53%	54%	57%	47%	56%
Travel safety training	42%	47%	40%	41%	36%	47%	51%	55%	38%	51%
GPS tracking of travellers	30%	36%	28%	31%	29%	30%	34%	45%	33%	44%

Technology's Role in Traveller Safety

- **Beyond booking capabilities, an overwhelming majority of travellers desire features that will keep them safe when using company-provided tools and apps.** When asked how important various features are in using a company-provided travel app, 79% say hotel booking is "somewhat" or "very" important to have, and 76% believe the same for air booking capabilities. While efficiency and practical elements are unsurprisingly most important in using a company booking tool, traveller safety is still a top priority. Rounding out the top 5 most important elements of a company app are available support during emergencies (76%), destination specific safety alerts (74%), and travel safety alerts (72%). Travellers highly value these safety services, and having them available within travel technology could be a huge draw to travellers using company travel tools, and keeping travellers safe.

How important* are the following features when it comes to using a company app?
(n=968)

Feature	%
Hotel booking	79%
Air booking	76%
Available support during emergencies	76%
Destination specific safety alerts	74%
Travel safety alerts	72%
Itinerary management	68%
Option to collect bonus miles, loyalty points, etc.	66%
Automated notification for out-of-policy expenses	64%
Mobile chat	54%

*% who indicated the features were "somewhat" or "very" important

- **A majority of travellers believe their organisation is technologically advanced in multiple aspects. Nevertheless, there is room for growth.** Knowing what we know about travellers' priorities, it's important to understand where there is room for growth. On average, 62% of business travellers believe their organisation is "somewhat" or "very" advanced in the technology they offer, including functionalities like pre-trip approvals, personalised booking, expense reporting, and expense audits. However, on average 28% of business travellers believe their technology to be average, and one in ten believe their
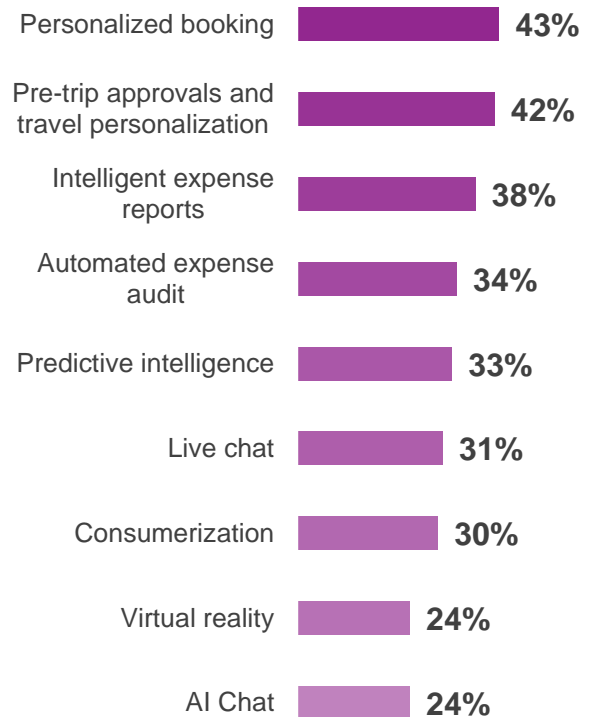
organisations to be "somewhat not advanced" or "not advanced at all", indicating some organisations might be falling behind on technology that could make booking and expensing more efficient and, in turn, travellers more satisfied with their company tools.

- **In looking at next steps for technology innovation, most travellers are looking for technology that will make the booking process more personalised and efficient.** When it comes to what travellers want to see in the future of their company's tools, many desire capabilities that would make booking and expensing more efficient.

  o Nearly half (43%) of travellers ranked personalised booking, pre-trip approvals and travel personalisation (42%), in their top three interests. In recent years, personalisation has emerged as a hot topic in travel. Through artificial intelligence (AI) and machine learning, booking tools will have greater ability to analyze past purchases, loyalty information, or demographic traits to "predict" which offers travellers will prefer. This can give rise to a better booking experience, but at the same time, it poses challenges for "managed travel", as travellers' preferences may conflict with the what is preferred in travel programs. Yet travellers may

% of travelers who ranked the following in their top 3 choices

Personalized booking	**43%**
Pre-trip approvals and travel personalization	**42%**
Intelligent expense reports	**38%**
Automated expense audit	**34%**
Predictive intelligence	**33%**
Live chat	**31%**
Consumerization	**30%**
Virtual reality	**24%**
AI Chat	**24%**

increasingly prefer using consumer channels which offer a more personalised experience.

- o Intelligent expense reports, which can autofill and/or provide e-receipts was also placed in the top three by nearly four in ten (38%) travellers.
- o One-third of travellers placed automated expense audits (34%), which can catch fraudulent or out-of-policy expenses, and predictive intelligence (33%), that will predict traveller preferences based on personal characteristics, in their top 3.
- o Three in ten travellers are very interested in live chat to provide live travel agents to answer questions through a chat feature in the booking tool (31%), and consumerization to offer a more user-friendly booking experience (30%). However, interest in consumerization is higher for Nordic (39%), Belgian, and Dutch (39%) business travellers.
- o One-quarter of travellers indicated they were highly interested in virtual reality, which uses a virtual headset to experience 3-D simulations of travel choices such as hotel rooms or airline seats (24%), and AI chat in which chatbots use artificial intelligence to answer questions during the booking process (24%). Interest in virtual reality was significantly higher for UK travellers (32%).

- **Unsurprisingly, business travellers are willing for their booking tools to collect and use personal data if doing so is GDPR compliant. However, traveller safety and the promise of personalised, efficient booking are also motivating factors.** Many individuals in the EU are cognizant of the GDPR, so it comes as no surprise that travellers are most willing for their booking tool to collect and use personal data if it is clear how the information is being used (45%) and they have the option to opt out any time (42%), two critical tenets of the legislation. However, about one-third of travellers would also allow company tools to use their data for the benefit of their safety, such as if sharing their data

could make it easier to contact them in case of emergency (37%), or if it made booking easier by making it faster (34%) or providing travellers with more relevant search results (33%).

- **When it comes to the data travellers are willing to share, generic information is most likely to be shared, with more personal information being less common.** Overall, about half (47%) of travellers are willing to share their travel preferences, such as their preferred hotel brand or airlines, with their online booking tools. Unsurprisingly, travellers are willing to share this information as doing so will likely result in more personalised search results, and more efficient booking. Over four in ten are also willing to share their contact information (45%) and company location (43%), pointing to the willingness to share information that might be helpful in case of an emergency or unexpected event. However, as the data becomes more personal, and perhaps less useful in booking or duty of care, travellers are less likely to share this information.

    - 38% are willing to share their date of birth.
    - 33% are willing to share their place of residence.
    - 27% are willing to share biometric data, such as fingerprints or body height.
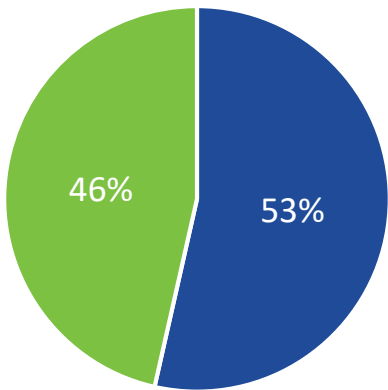
Conclusions

- **Booking data continues to play a critical role in traveller safety, and technology plays a critical role in how travellers book.** More than anything, travellers desire an efficient booking experience that is personalised to their needs. If these features are missing from a company tool, travellers are likely to book elsewhere, which might create significant challenges in not only maintaining savings from negotiated rates, but capturing traveller data and fulfilling traveller safety responsibilities.

- **Online booking tool use is expected to increase, but non-corporate bookings still need to be addressed.** Over two-thirds of travellers still book business travel directly or through online travel agencies, and use of alternative channels has remained fairly constant over the past four years. While travellers might use these channels for their prices or selection, booking through these non-corporate channels can hinder duty of care. Therefore, organisations should make sure they have appropriate policies or technology in place to capture bookings made outside of corporate channels.

- **Travellers increasingly expect their organisations to be responsible for their safety while travelling, which can be made more difficult if bookings are done outside of corporate channels.** Three-quarters of business travellers expect their organisation to contact them within two hours of an emergency, despite knowing that their organisations might not have resources in place to capture traveller data when they book through alternative channels. This is compounded by the fact that around one-third of travellers expect their organisation to be responsible for their safety when they add leisure days to their trips. With most travellers now taking "bleisure", organisations should communicate what is covered during leisure days to travellers, and ensure they have ways to capture all travellers' data during business trips.

- **There is room for improvement when it comes to booking and expense technology.** Travellers mainly book through alternative channels for pricing and convenience, providing a clear opportunity for travel managers to be communicative about the discounts received by booking through corporate channels. Many business travellers also value features that provide them with the efficient, personalised experience they desire, such as personalised booking, pre-trip approvals, and intelligent expense reports. Organisations should consider ways in which their booking tools are average or lacking in these features, and consider implementing technology and tools that allow for personalised experiences.

- **Travellers value efficiency in their company tools, and place high importance on a combination of booking and traveller safety features to assist them on business travel.** Along with efficient and personalised booking and expensing, travellers desire traveller safety features in company-provided tools. Organisations should consider providing travellers with the safety features they desire, such as emergency support and safety alerts. Moreover, a majority of travellers desire safety features that are mobile, making it easier for organisations to reach travellers as they are on business trips.

- **In order to improve tools, travellers are willing to share a variety of data, provided there is transparency in its use and doing so will allow for an easier business travel experience.** Along with technology implementation, organisations should be transparent in the ways in which data is used. In general, travellers are willing to share their data with their company for a better booking and business travel experience. However, with the GDPR now being law, business travellers in Europe are increasingly aware of how their data is being used, so travel buyers should be communicative about the ways in which traveller data can be used to provide a better traveller experience.
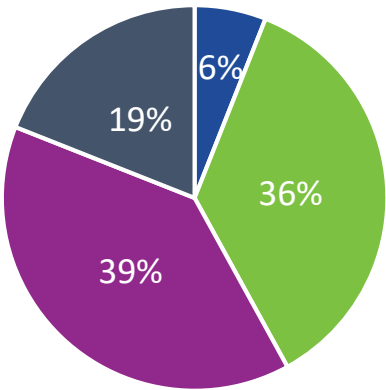
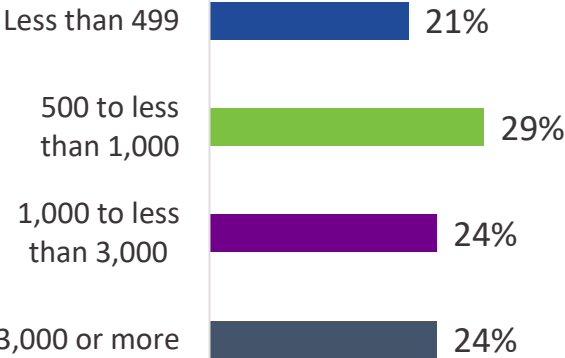# Respondent Profile[7]

Gender

■ Male ■ Female

46%   53%

Age

■ 18 to 21 ■ 22 to 37 ■ 38 to 53 ■ 54+

6%
19%
36%
39%

of Employees at Company

Less than 499	21%
500 to less than 1,000	29%
1,000 to less than 3,000	24%
3,000 or more	24%

Employment Status

■ Employed full-time ■ Employed part-time

7%
92%
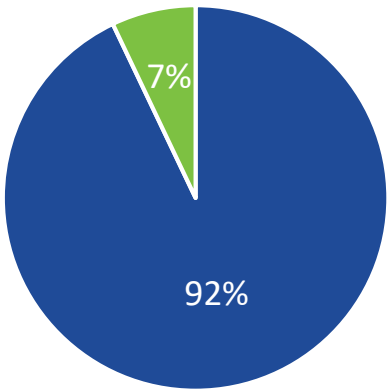
[7] **All percentages shown are after weighting; n=1,252**

of Business Trips in Past Year

2 to 5	44%
6 to 9	27%
10 to 24	18%
25+	10%
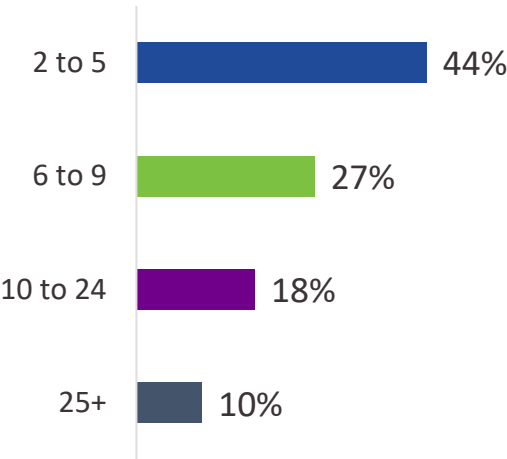
Types of Business Travel Destinations in the Past Year

|	
International within EU	61%
Domestic destinations	53%
International long-haul	25%
All of the above	12%
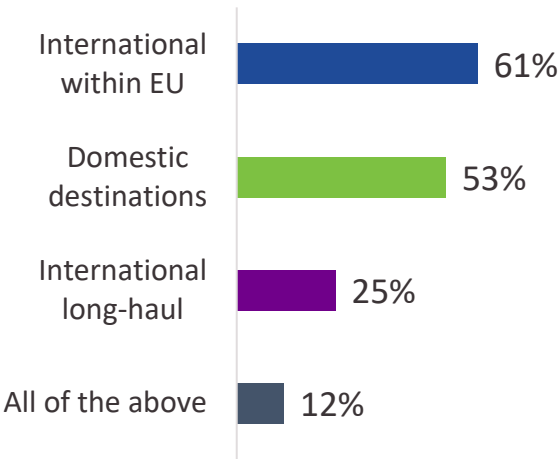
Company's Travel Policy

- I am required to follow my company's published and enforced travel policies
- I am encouraged to follow general guidelines
- My company has a travel policy, but I don't know what it is

5%
43%
50%
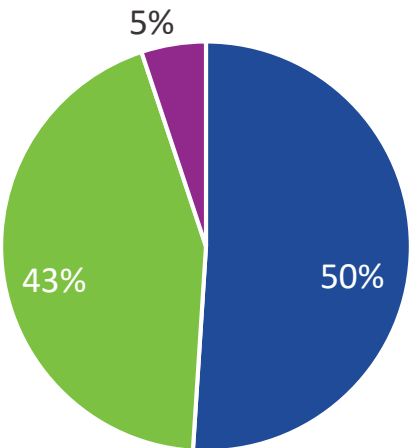
In the past 12 months, has your organisation/TMC/agency given you the option to book business trips through a specified corporate online booking tool (OBT)?

- Yes
- No

29%
71%
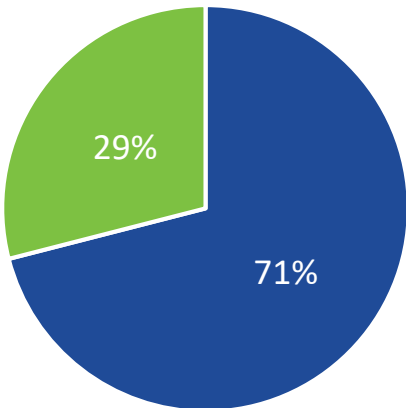
About the Global Business Travel Association

The Global Business Travel Association (GBTA) is the world's premier business travel and meetings trade organisation headquartered in the Washington, D.C. area with operations on six continents. GBTA's 9,000-plus members manage more than $345 billion of global business travel and meetings expenditures annually. GBTA delivers world-class education, events, research, advocacy and media to a growing global network of more than 28,000 travel professionals and 125,000 active contacts. To learn how business travel drives lasting business growth, visit **www.gbta.org**.

About SAP Concur

SAP® Concur® solutions simplify expense, travel, and invoice management for greater visibility and control. For more than 20 years, these leading, innovative solutions have kept customers a step ahead by delivering time-saving tools, connected spending data, and a dynamic ecosystem of diverse partners and apps. User-friendly and business-ready, SAP Concur solutions unlock powerful insights that help businesses reduce complexity and see spending clearly, so they can manage it proactively.