



The Digital Business Traveler

A Survey of Business Travelers in North America,
Germany, Italy, Spain, and the Nordic Countries

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INTRODUCTION

Technology plays a growing role in managed travel. Last year, the GBTA Foundation released *Travel Manager 2020*, in partnership with Sabre¹, a report based on survey results of more than 200 U.S.-based Travel Managers about the direction of their profession. Of those surveyed, three out of five Travel Managers indicated *evaluating and applying technology solutions* is “very important” to the “success of a Travel Manager” today. Even more (75%) expected it would be “very important” to their success in the next three to five years.

Yet technology has not only impacted travel management; it has also impacted the business traveler’s experience. This new study examines technology trends from the business traveler’s perspective, focusing especially on mobile apps. It is based on a survey of 756 North America-based business travelers and another 970 travelers who are based in Germany, Italy, Spain, and four Nordic countries. The primary goals were to discover:

- 1) How do business travelers feel about travel technology trends including personalized offers, mobile payment, sharing economy services, and social media? Do they use these on business trips – and do they feel these have improved, or could improve, their experience?
- 2) What types of mobile apps do business travelers typically use? Do they use supplier apps at a higher rate than TMC and other company-preferred apps?
- 3) How often do companies recommend travel apps to their travelers? Do companies commonly require travelers to use particular apps?

EXECUTIVE SUMMARY

Business travelers prefer using self-service technology to manage their own travel. If given the choice, a solid majority in each country would manage their own business travel using self-service technology, as opposed to work with (their) organization’s travel agency or internal travel department.

Most business travelers want personalized travel options—but are only willing to share some information to receive them. In most countries surveyed, about seven out of 10 travelers think “receiving travel options catered to (their) personal travel history and preferences” is “important” or “very important.” Yet in general, travelers are only willing to share some information to receive these. They are commonly willing to share information about their travel preferences—such as preferred brands, amenities, and flight times. They are less commonly willing to share more private information—such as their travel history, preferred leisure activities while traveling, and their business calendar with booked appointments.

Despite the prevalence of social media, business travelers do not frequently use it to share experiences while traveling. In each country surveyed, only about one-third of travelers or fewer “often” or “always” use it to share experiences. Another one-fifth to one-third in each country “sometimes” use it to share experiences.

¹ GBTA Foundation, *Travel Manager 2020: Foundational Shifts in the Role of the Travel Manager* (Alexandria, VA: GBTA Foundation, 2015).

Business travelers use a variety of travel-related mobile apps during their trips. In all countries surveyed, supplier apps are much more commonly used than TMC, itinerary management, and expense management apps.

Most companies do not require or recommend travel apps. In each country surveyed, only one-fifth of travelers or fewer say their organization “has specific apps they require for business travel.” Another one-fifth to one-third say their organization “allows (them) to use (their) own preferred apps for business travel” and about half in each country say their “organization does not recommend any travel apps.”

While many business travelers are moderately interested in using ride sharing services during their trips, few are very interested. In each country surveyed, a majority are at least “somewhat interested” in using ride sharing services on business trips. However, a much smaller share, generally one-fifth or fewer, are *very* interested in using them. The only exception is the United States, where 31% of business travelers are *very* interested in using ride sharing services on their trips.

While business travelers do not typically use mobile payment or e-wallet technology, many would likely use it if they had the opportunity. In each country, fewer than 15% of travelers typically use mobile payment to pay for business-related expenses while traveling. However, in most countries surveyed, half of travelers or more would “likely” or “very likely” use it if they had the opportunity.

METHODOLOGY







An online survey was conducted of business travelers in nine countries: the United States, Canada, Germany, Italy, Spain, Denmark, Finland, Norway, and Sweden. The four Nordic countries are grouped together and referred to as one region throughout the report.² Fielding took place from March 21st, 2016 to April 3rd, 2016. Respondents qualified if they were employed full-time and had traveled for business in the past year.







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 traveler population, thereby allowing comparison between groups. However, after sampling, a few groups remained underrepresented. As a result, the data were weighted to roughly approximate the desired distribution within each country. All percentages and sample sizes reported throughout the report are after weighting. The table on the next page displays the weighted age and gender distribution of respondents.

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

² The figures for Nordic-based business travelers are not representative of the region and are skewed towards Norway. Specifically, it is made up of more Norway-based travelers (36%) compared to Denmark (16%), Finland (25%), and Sweden-based (24%) travelers. In addition, while there is a balanced age and distribution across the group, there is not a balanced distribution within each country.

RESPONDENT PROFILE

Demographics and Travel Behavior	North America-based Business Travelers			Europe-based Business Travelers		
						
Gender	(n=502)	(n=254)	(n=246)	(n=251)	(n=225)	(n=248)
Male	59%	55%	61%	60%	59%	60%
Female	41%	45%	39%	40%	41%	40%
Age	(n=502)	(n=254)	(n=246)	(n=251)	(n=225)	(n=248)
18 to 24	6%	6%	9%	3%	3%	4%
25 to 34	24%	24%	20%	20%	24%	24%
35 to 44	28%	26%	20%	32%	34%	28%
45 to 54	22%	21%	26%	30%	26%	25%
55 to 64	15%	18%	21%	14%	12%	18%
65 or over	5%	5%	4%	0%	0%	2%
Estimated average	43 years	43 years	44 years	43 years	42 years	43 years
Number of business trips in past year	(n=502)	(n=254)	(n=246)	(n=251)	(n=225)	(n=248)
1 to 5 trips	61%	75%	63%	59%	61%	69%
6 to 11 trips	25%	16%	21%	27%	24%	20%
12 or more trips	15%	8%	16%	14%	15%	11%
Estimated average	7 trips	6 trips	8 trips	7 trips	8 trips	6 trips
Position type	(n=490)	(n=250)	(n=244)	(n=248)	(n=222)	(n=244)
Mainstream / support	20%	20%	26%	29%	32%	37%
Middle management	40%	51%	47%	40%	39%	36%
Upper management	23%	18%	14%	16%	13%	9%
C-level	12%	7%	11%	7%	7%	13%
Other	4%	3%	2%	7%	9%	5%

Demographics and Travel Behavior (Cont.)	North America-based Business Travelers			Europe-based Business Travelers		
	 (n=490)	 (n=251)	 (n=244)	 (n=248)	 (n=221)	 (n=244)
Number of employees at organization						
Less than 499	31%	26%	32%	34%	36%	45%
500 to less than 4,999	41%	46%	39%	35%	39%	29%
5,000 or more	27%	28%	28%	25%	23%	22%
Not sure	2%	1%	1%	5%	1%	4%
Estimated average	3,300	3,500	3,500	3,200	3,000	2,800
Type(s) of business travel destinations in past year						
Domestic only	63%	39%	44%	38%	39%	30%
International only	7%	14%	9%	8%	9%	29%
Both	31%	47%	47%	54%	51%	41%
Company travel policy						
I am required to follow my organization's published and enforced travel policies	31%	37%	39%	37%	31%	43%
I am encouraged to follow general guidelines	36%	37%	29%	43%	36%	27%
I have no stated restrictions or organization's guidelines to follow	30%	22%	25%	17%	28%	20%
I don't know if my organization has a travel policy	2%	4%	5%	2%	5%	8%
My company has a travel policy, but I don't know what it is	1%	1%	3%	1%	0%	1%

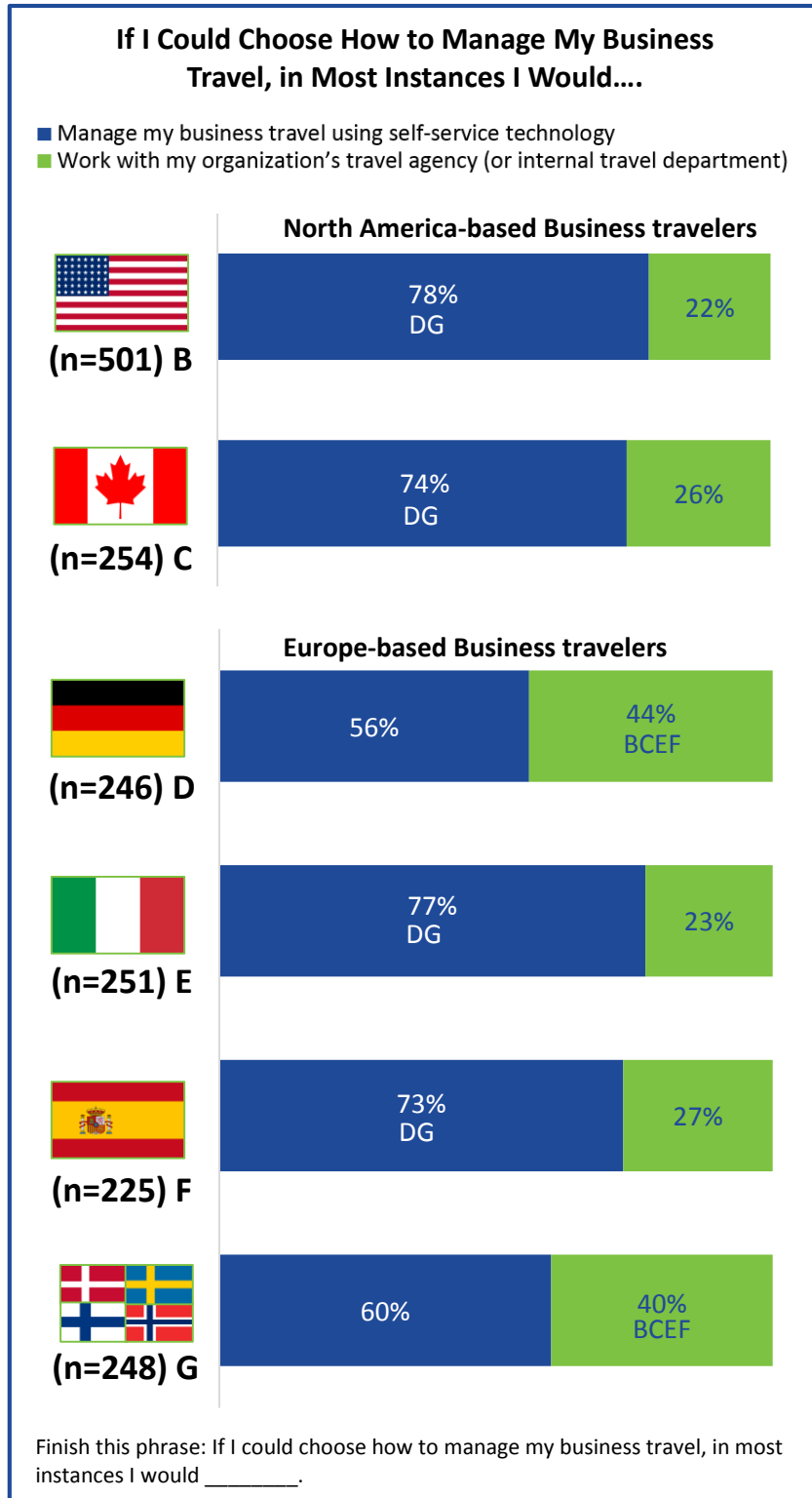
TECHNOLOGY TRENDS

Technology and Travel Autonomy

For more than a decade, technological innovation has decentralized the travel process: It has given business travelers control of tasks for which they had traditionally depended on travel agents. Travelers no longer need to call an agent to plan an itinerary or book a trip; they can make their own arrangements online. Mobile technology can perhaps accelerate this trend further – giving travelers the option to manage their own travel while they are in-transit.

In general, business travelers appear to embrace this shift. In each country surveyed, a majority would *manage (their) business travel using self-service technology* in most instances, if given a choice. The rate is higher in North America, Italy, and Spain, compared to Germany and Nordic countries, where at least two out of five would still *work with (their) organization’s travel agency (or internal travel department)* in most instances.

While most business travelers prefer autonomy, this does not mean they dislike working with travel professionals. A recent GBTA Foundation study found that 82% of U.S.-based business travelers who booked with a travel manager or agent in the past year were satisfied doing so, higher than the rate for online booking tools (75%).³



³ GBTA Foundation, *TMCs Today and Tomorrow: A Survey of Business Travelers and Corporate Travel Managers* (Alexandria, VA: GBTA Foundation, 2015), 35.

Age comparisons

For much of their lives, Millennials have had the option to use the Internet to accomplish tasks their parents performed using other means. They are frequently accustomed to shopping, playing games, and dating online.

Surprisingly, however, Millennials are generally *not* much more likely than their older counterparts to prefer “manag(ing) their own travel using self-service technology.” In most countries surveyed, at least seven out of 10 Millennials prefer managing their own travel using technology to working with travel professions. These figures are generally similar to those among Gen-X and Baby Boomer travelers. In the United States, the share of Millennials who prefer managing their own travel using technology is slightly *lower* than the share among Gen-X travelers.







Percentage Who Prefer Managing Their Own Travel Using Self-Service Technology

18 to 34
B

35 to 54
C

55 or over
D

-by age

	18 to 34 B	35 to 54 C	55 or over D
 (n=103-259)	72%	82% B	78%
 (n=52-128)	79%	75%	64%
 (n=55-121)	57%	56%	54%
 (n=36-156)	87% D	74%	69%
 (n=25-137)*	75%	74%	66%
 (n=50-137)	69% C	54%	61%

Finish this phrase: If I could choose how to manage my business travel, in most instances I would _____.

*Small sample size (n<30) for Spain-based travelers 55 or older

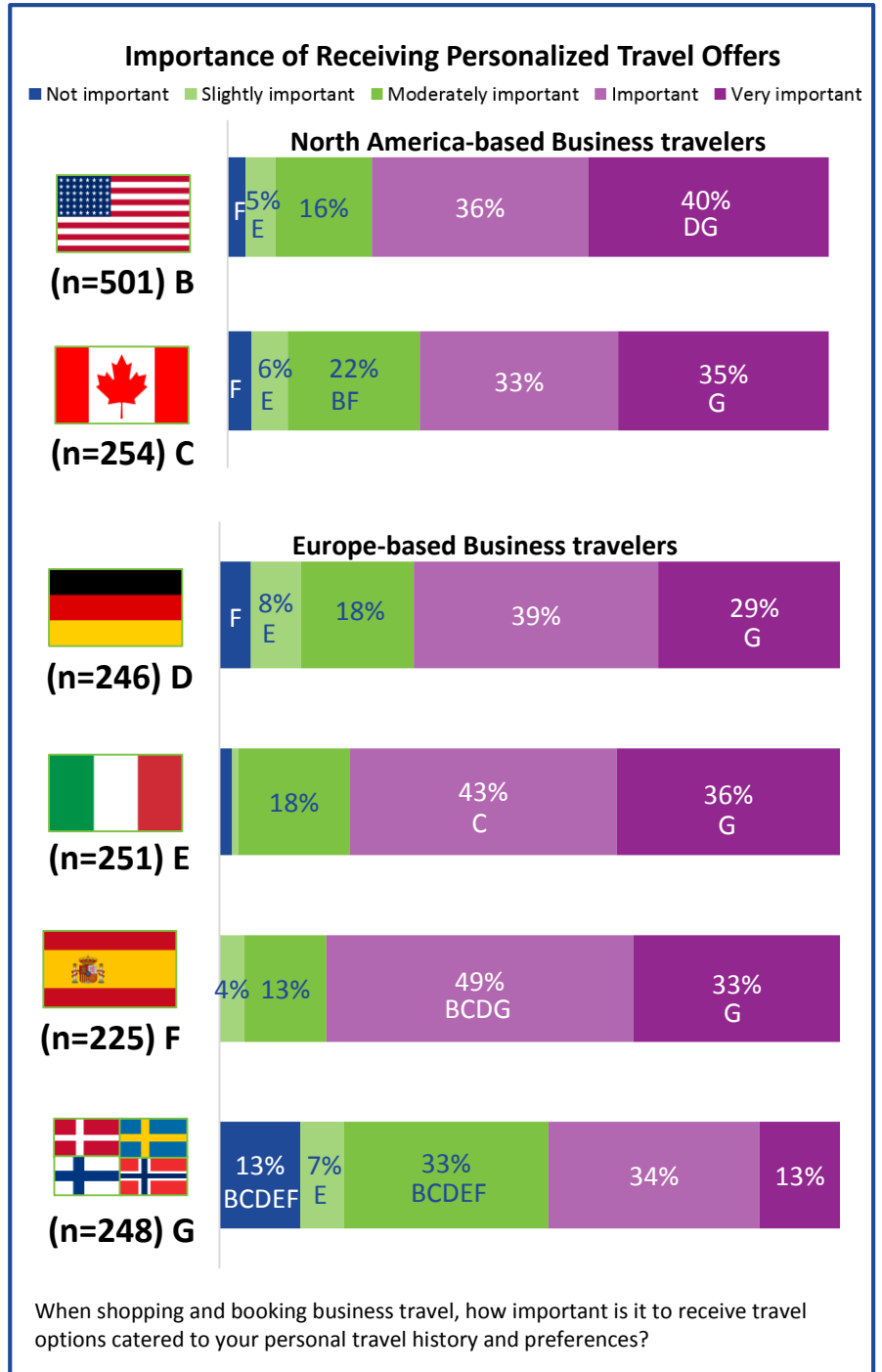
Technology and Personalization

The corporate travel industry can use big data to provide personalized travel options. For instance, online booking engines might sort search results according to a traveler's favorite providers or preferred travel times. Airlines and hotels can track the ancillary items travelers have purchased and offer them related items in the future.

When travel programs have control of this process, it can help them improve traveler satisfaction and promote in-policy behavior. Travelers will have less reason to go out-of-policy when they can easily find satisfactory in-policy options. At the same time, personalized offers pose challenges. For instance, they could undermine traveler privacy and encourage greater spending on ancillary items and upgrades.

In general, travelers want to receive personalized travel options. In North America, roughly seven out of 10 travelers say receiving "travel options catered to (their) personal travel history and preferences" is "important" or "very important," while only 3 say it is "not important."

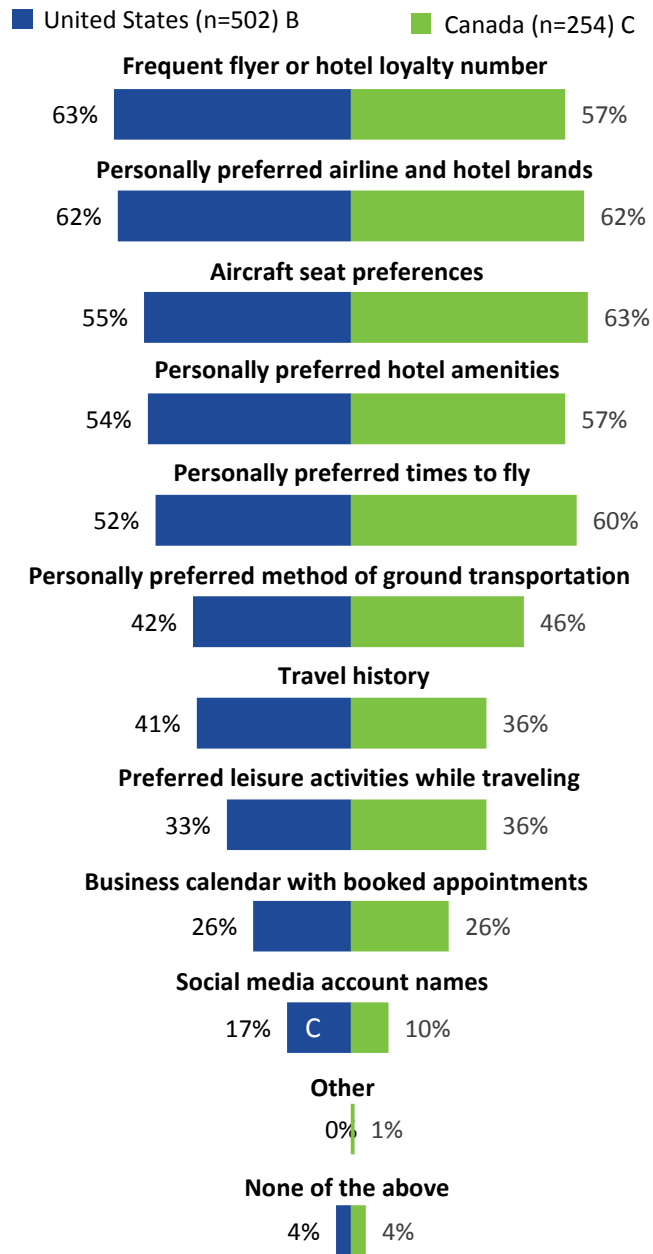
In Europe, the story is largely similar. In Germany, Italy, and Spain, the share who think receiving personalized offers is important ranges from 68% to 82%. It is much lower, however, among Nordic-based business travelers.







Even though business travelers want personalized options, they are generally only willing to share some information to obtain them. They are commonly willing to share information about their travel preferences. In North America, majorities are willing to share their *frequent flyer or hotel loyalty number*, *preferred airline and hotel brands*, *aircraft seat preferences*, *preferred hotel amenities*, and *preferred times to fly*. However, they are less commonly willing to share more private information. Fewer than half would share their *travel history*, *preferred leisure activities while traveling*, their *business calendar with booked appointments*, and their *social media account names*.

Like their North American counterparts, many of the Europe-based business travelers surveyed are willing to share their *preferred hotel amenities*, *preferred times to fly*, *preferred airline and hotel brands*, and *aircraft seat preferences* (see next page). Fewer than half are willing to share other details such as their *travel history*, *preferred leisure activities while traveling*, their *business calendar with booked appointments*, and their *social media account names*. The Europe-based travelers are generally less likely than their North American counterparts to say they are willing to share their *frequent flyer or hotel loyalty program number* and their *business calendar with booked appointments*.

What Information Would Travelers Be Willing to Share in Exchange for a More Personalized Travel Experience? North America-based Business Travelers



What personal information and preferences would you be willing to share in order to receive a more personalized experience while traveling for business?
Please select all that apply.

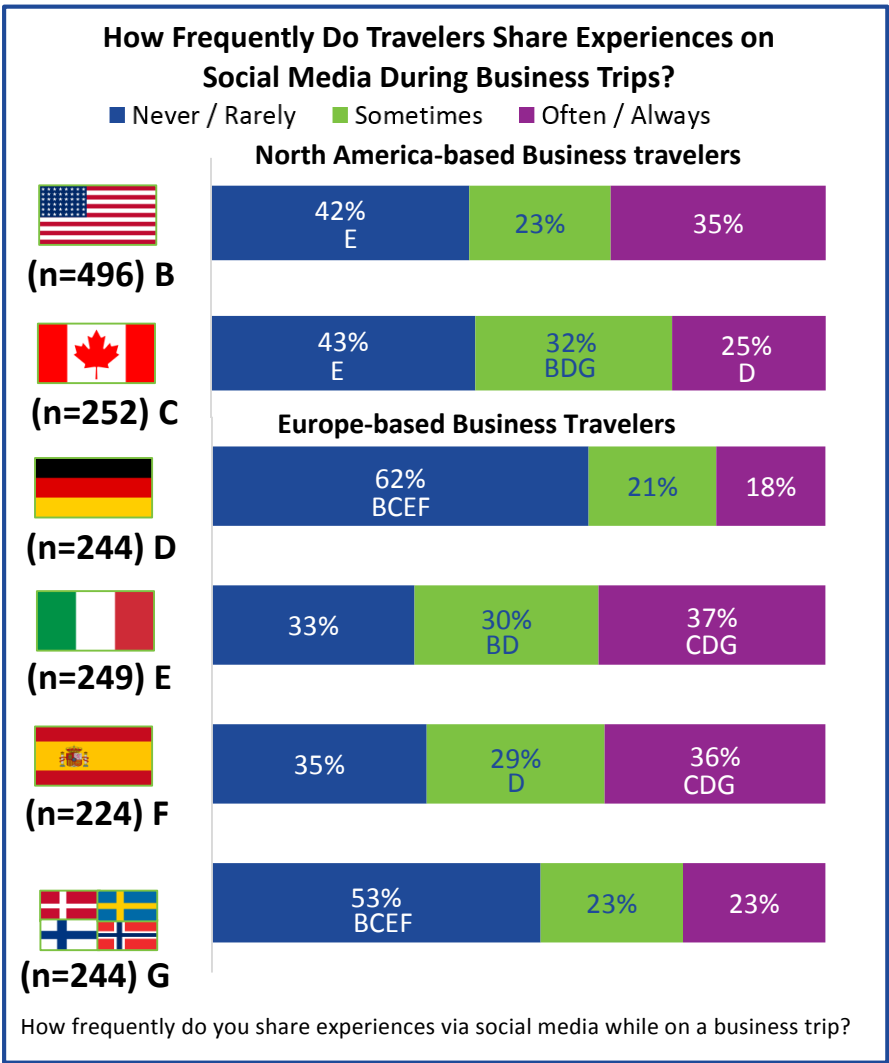
What Would Business Travelers Share for a More Personalized Travel Experience?	Europe-based Business Travelers			
	 (n=246) D	 (n=251) E	 (n=225) F	 (n=248) G
Personally preferred hotel amenities	65% EFG	51% G	54% G	32%
Personally preferred times to fly (ie. early morning, late afternoon, etc.)	57% G	55% G	71% DEG	46%
Personally preferred airline and hotel brands	55% G	49%	61% EG	41%
Aircraft seat preferences	52% E	36%	52% E	43%
Frequent flyer or hotel loyalty number	41% E	27%	39% E	47% E
Personally preferred method of ground transportation	35%	37% G	46% DG	26%
Travel history	23%	40% D	33% D	36% D
Preferred leisure activities while traveling	24%	31% G	38% DG	19%
Business calendar with booked appointments	18%	22% G	35% DEG	14%
Social media account names	9%	14% G	18% DG	7%
None of the above	6%	2%	1%	13% DE

What personal information and preferences would you be willing to share in order to receive a more personalized experience while traveling for business? **Please select all that apply.**

Social media

Despite the prevalence of social media, business travelers do not frequently use it to share experiences while traveling. In each country surveyed, only about one-third of travelers or fewer “often” or “always” use it to share experiences. Another one-fifth to one-third in each country “sometimes” use it to share experiences.

The travelers who at least sometimes share their experiences were asked what experiences they share. The vast majority gave non-work-related answers—such as reviews of airlines or hotels or pictures of local attractions. However these figures mask significant age differences. In every country surveyed, Millennials are most likely to “often” or “always” share experiences on social media during business trips.

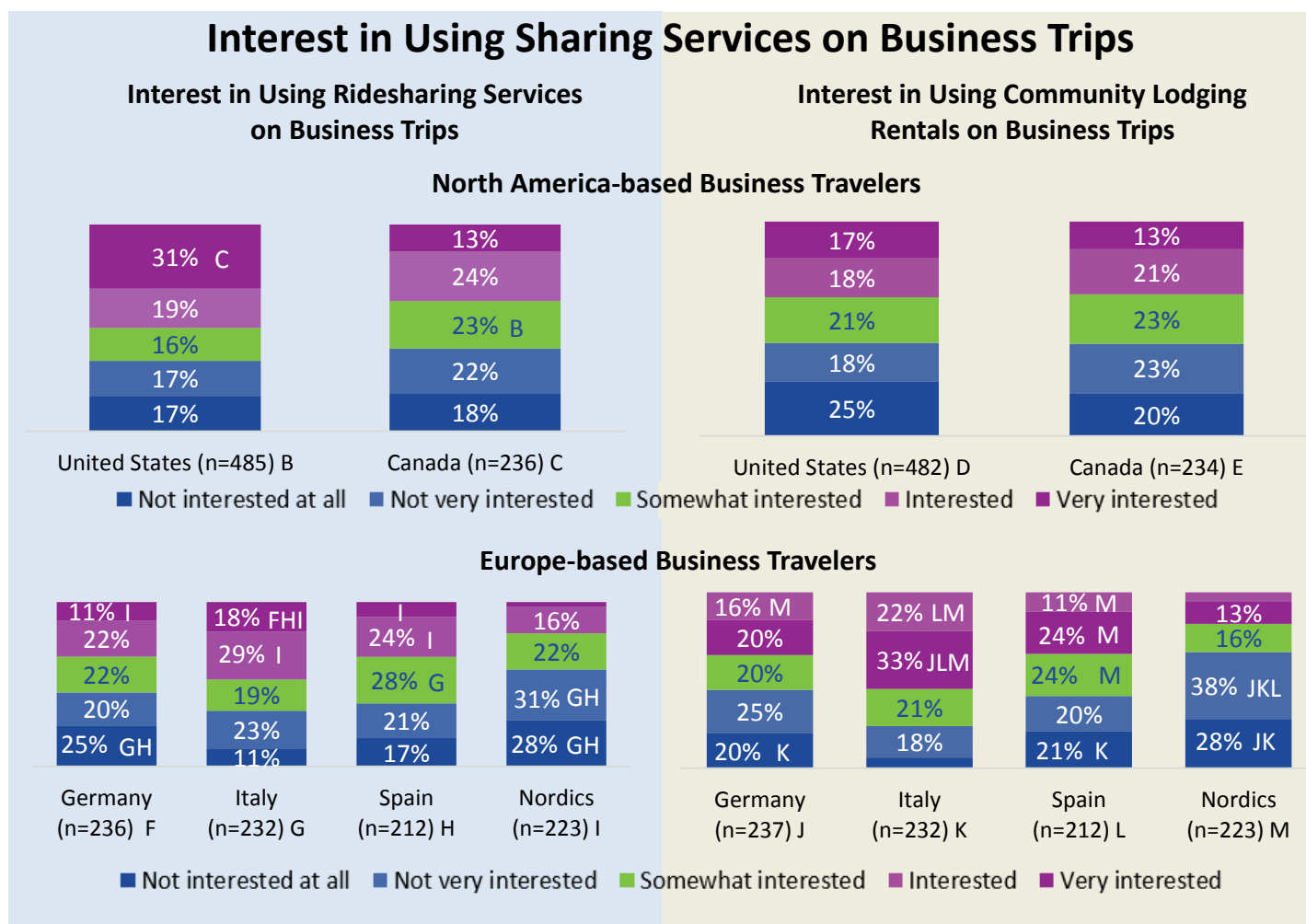


Percentage Who "Often" / "Always" Share Experiences Via Social Media While on a Business Trip	18 to 34	35 to 54	55 or over
	B	C	D
-by age			
USA (n=102-256)	57% CD	31% D	16%
Canada (n=51-128)	44% CD	20% D	12%
Germany (n=54-120)	29% D	17% D	6%
Italy (n=36-154)	51% CD	34%	25%
Spain (n=25-137)*	50% CD	32%	26%
Scandinavia (n=48-135)	30% D	23%	14%

How frequently do you share experiences via social media while on a business trip?
 *Small sample size (n<30) for Spain-based travelers 55 or older

Sharing services







Mobile apps have contributed to rapid growth of the sharing economy. This trend can have a major impact on business travel. Last year, the expense management company Certify analyzed transaction data, and found that in the third quarter of 2015 employees used ride sharing services for business travel more often than they used taxis.⁴ One year earlier (in Q3 of 2014), they still used taxis much more often. Survey respondents are moderately interested in using sharing services during their trips. In each country surveyed, a majority are at least “somewhat interested” in using ride sharing services on business trips. However, a much smaller share are “very interested” in using them, except in the United States, where 31% are “very interested.”



How interested are you in using the following while traveling for business:

When it comes to age comparisons, Millennials are substantially more interested in using ride sharing and community lodging, compared to Ge-X travelers and Baby Boomers. Gen-X travelers are more interested in using these services compared to Baby Boomers.

⁴ “Ridesharing Surpasses Taxis, Sets a Course for Rental Cars,” Certify. <https://www.certify.com/Infographic-Ridesharing-Surpasses-Taxies-Sets-a-Course-for-Rental-Cars.aspx>

Percentage Who Are "Interested" / "Very Interested" in Using Sharing Services on Business Trips -by age	Ridesharing			Community Lodging		
	18 to 34	35 to 54	55+	18 to 34	35 to 54	55+
	B	C	D	E	F	G
 (n=96-237)	74% CD	45% D	26%	55% FG	30%	21%
 (n=47-121)	55% CD	36% D	15%	45% G	34% G	17%
 (n=55-117)	41%	30%	27%	49% FG	32%	26%
 (n=34-141)	62% CD	45%	27%	71% FG	52%	41%
 (n=24-132)*	36%	33%	28%	42%	33%	26%
 (n=39-127)	33% CD	16% D	5%	31% FG	15%	10%

How interested are you in using the following while traveling for business:

* Small sample size (n<30) for Spain-based travelers 55 or older

MOBILE TECHNOLOGY

What travel-related mobile apps do business travelers use?

Business travelers use a variety of travel-related mobile apps during their trips. In all countries surveyed, supplier apps are more commonly used than travel management company (TMC), itinerary management, and expense management apps.

Business travelers were asked to indicate which types of travel-related mobile apps they “most typically use while traveling for business.” In North America, of the five most commonly used types, three are travel supplier apps (airline, lodging, and ground transportation) and the other two are online booking site and restaurant apps. Surprisingly, despite the popularity of ride-sharing services, fewer than three out of five typically use these during business trips, including 18% in Canada. These apps may be less popular on business trips than they are in other scenarios.

In general, travelers do not commonly mention using TMC, itinerary management, and expense management apps. This could reflect, however, that some respondents do not work for companies with a managed travel program. For instance, between one-fifth and one-third of respondents in each country say their company does not have a travel policy. However, even among those who say their company has a travel policy, these types of apps are not commonly used (see next page).

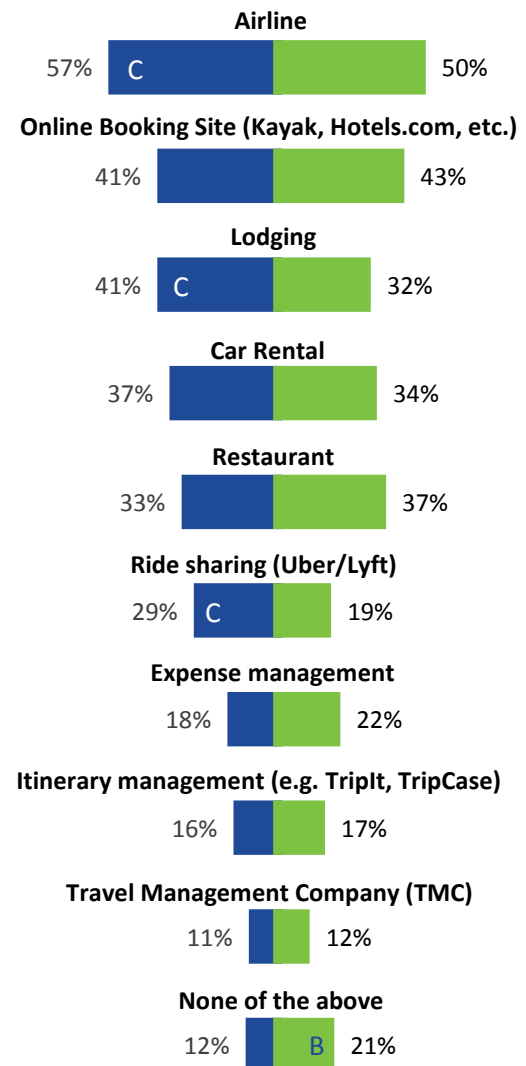
When comparing the United States and Canada, one-fifth of Canada-based business travelers typically used none of the apps tested, compared to only 11% of United States-based business travelers. United States-based travelers are more likely to use airline and lodging apps.

These findings underscore a potential role for Travel Managers when it comes to mobile apps. Because of widespread use of supplier and OTA apps, Travel Managers could address these in their travel policy, or encourage travelers to download a preferred provider’s app. In addition, Travel Managers could promote awareness and adoption of other types of apps that more closely align with their priorities. Examples include corporate online booking, TMC, itinerary management, expense management, and safety/security apps.

Which Travel-Related Apps Do Business Travelers Typically Use *Most* While Traveling?

North America-based business travelers





■ United States (n=502) B ■ Canada (n=254) C









What travel-related apps on your phone do you most typically use while traveling for business? Please select all that apply.

In the European countries surveyed, a similar pattern emerges. Travelers typically use supplier and OTA apps at much higher rates than itinerary management, expense management, and TMC apps. In addition, in each European country surveyed, fewer than 15% of travelers typically use ride sharing apps during business trips. This is much lower than the rate in the United States (28%).

When comparing the various countries, Germany and Nordic-based travelers are especially likely to use none of the apps tested, compared to Italy and Spain-based business travelers.

Which Apps Do Business Travelers Use the <i>Most</i> While Traveling?	Europe-based Business Travelers			
	 (n=246) D	 (n=251) E	 (n=225) F	 (n=248) G
Restaurant	41% G	44% G	42% G	23%
Airline	34%	49% DG	52% DG	36%
Online Booking Site (Kayak, Hotels.com, etc.)	34% G	40% G	52% DEG	25%
Lodging	29% G	26% G	57% DEG	8%
Car rental	28% G	32% G	41% DG	18%
Expense management	17% G	20% G	26% DG	7%
Itinerary management (Triplt, TripCase etc.)	13%	20% DG	19% G	10%
Ride sharing (Uber, Lyft)	9%	10%	14% G	7%
Travel management company (TMC)	7%	9%	13% DG	7%
None of the above	23% EF	14% F	6%	38% DEF

What travel-related apps on your phone do you most typically use while traveling for business?
Please select all that apply.

Use of Company-Preferred Travel-related Mobile Apps	North America-based Business Travelers			Europe-based Business Travelers		
	 (n=334) B	 (n=189) C	 (n=176) D	 (n=200) E	 (n=148) F	 (n=174) G
-Filtered for travelers who work at organizations with a travel policy						
Expense management	19% G	23% G	19% G	20% G	27% BG	7% G
Itinerary management (Triplt, TripCase, etc.)	15%	17% G	15%	20% G	20% G	10%
Travel Management Company (TMC)	11%	13%	8%	10%	13% G	7%

What travel-related apps on your phone do you most typically use while traveling for business? Please select all that apply.

Why do business travelers use travel-related apps?

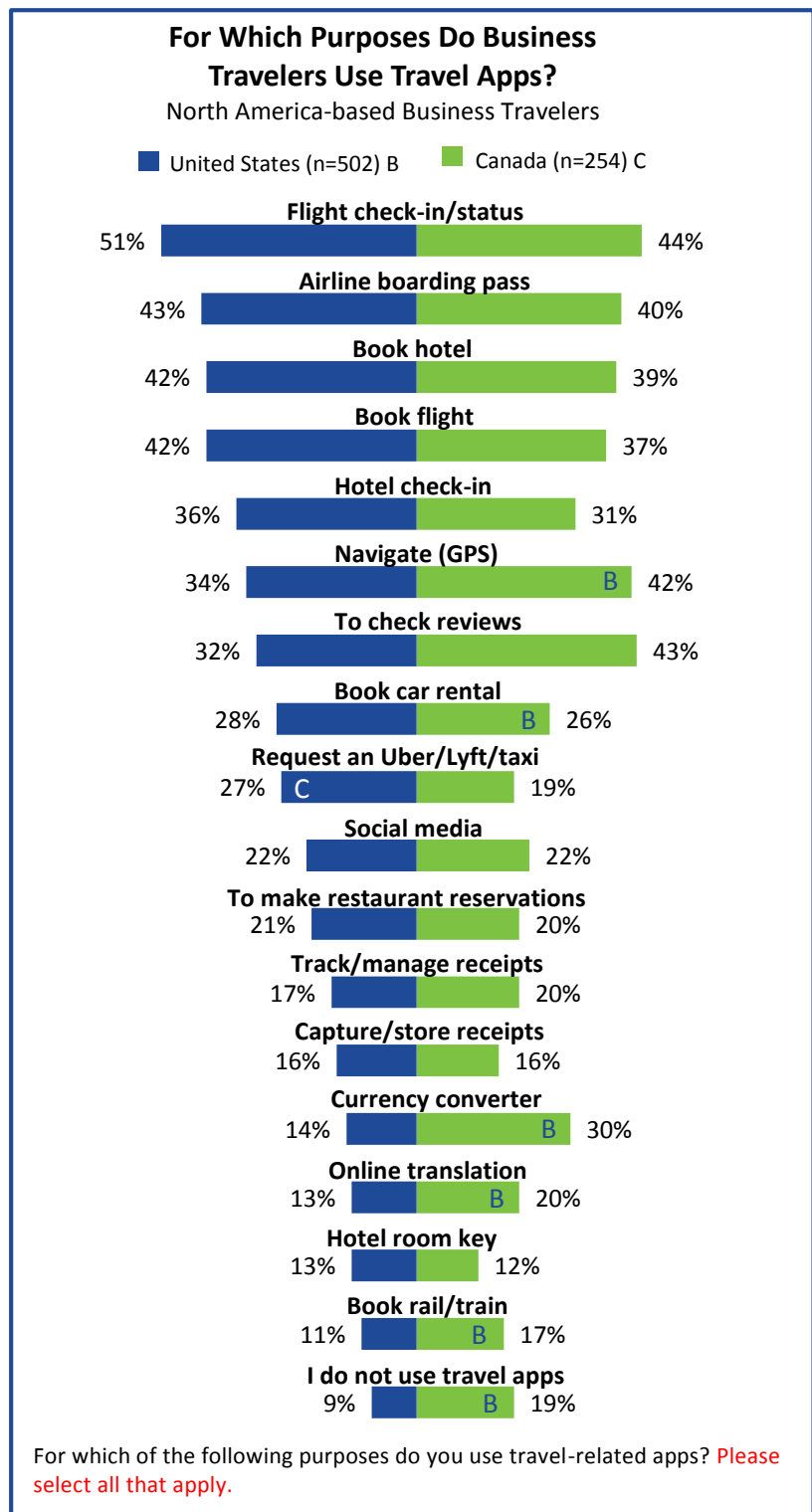
Business travelers use travel-related mobile apps for a variety of purposes. In North America, the most common purposes are *flight check-in / status*, generating an *airline boarding pass*, and *booking hotels and flights*.

In North America, roughly one-fifth to one-third of business travelers use apps to *request an Uber / Lyft / taxi* or post trip details or photos on social media.





The fairly widespread use of travel apps for booking may pose a challenge to travel programs. Since only a small share of travelers typically use TMC apps (see p. 15), many of these bookings likely go through supplier or OTA apps, which could be out-of-program.

When comparing the U.S. and Canada, Canada-based business travelers are more likely to use travel apps for *navigation*, *checking reviews*, *currency conversion*, and *booking rail / train*. They are also more likely to say they do not use travel apps for any purpose tested, compared to their American counterparts. United States-based travelers are more likely to use them to *request an Uber / Lyft / taxi*.

In the European countries surveyed, business travelers use travel-related apps for many of the same purposes as their North American counterparts. However, compared with U.S.-based business travelers, Germany and Nordic-based travelers are less likely to use travel-related apps for booking, while Spain-based travelers are more likely to do so.









In all European countries surveyed, business travelers are more likely to use apps to *book rail / train*, compared with their North American counterparts, and less likely to use them to *request an Uber / Lyft / taxi*.

For Which Purposes Do Business Travelers Use Travel-related Apps?	Europe-based Business Travelers			
	 (n=246) D	 (n=251) E	 (n=225) F	 (n=248) G
Navigate (GPS)	43% G	43%	39%	34%
Flight check-in / status	38%	36%	44%	39%
Book hotel	31%	41% DG	52% DEG	28%
Airline boarding pass	29%	28%	45% DE	38% DE
Currency converter	27% E	19%	21%	21%
Book car rental	26% G	29% G	35% DG	15%
Online translation	25% G	25% G	23%	17%
Hotel check-in	24%	24%	26%	19%
To check reviews	23%	40% DG	31% D	26%
Book flight	22%	40% DG	52% DEG	23%
Book rail/train	22%	35% DG	31% DG	20%
To make restaurant reservations	16%	26% DG	19%	14%
Social media (sharing trip details / pictures)	12%	17%	20% D	17%
Request an Uber / Lyft / Taxi	10%	15% G	11%	8%
Capture / store receipts	10% G	12% G	17% DG	5%
Track / manage expense reports	8% G	16% DG	18% DG	3%
Hotel room key	7% G	8% G	19% DEG	3%
I do not use travel apps	20% EFG	10%	7%	25% EF

For which of the following purposes do you use travel-related apps? **Please select all that apply.**







Even among business travelers who say their company has a travel policy, a good share have booked a trip using supplier or OTA apps in the past year.

For Which Purposes Do Business Travelers Use Travel-related Apps?	North America-based Business Travelers			Europe-based Business Travelers		
	 (n=334) B	 (n=189) C	 (n=176) D	 (n=200) E	 (n=148) F	 (n=174) G
-Filtered for travelers who work at organizations with a travel policy						
Flight check-in / status	52% DE	45%	40%	36%	44%	43%
Airline boarding pass	43% DE	42% DE	31%	30%	43% DE	43% DE
Navigate (GPS)	33%	41%	44% BG	43% BG	43% BG	32%
Book flight	43% DG	39% DG	22%	38% DG	50% CDEG	22%
Book hotel	40% DG	41% DG	28%	41% DG	50% BDEG	28%
Hotel check-in	33% DEG	33% DEG	23%	23%	24%	20%
To check reviews	32%	44% BDG	23%	42% BDG	33%	26%
Book car rental	27% G	25% G	25% G	28% G	32% G	13%
Request an Uber / Lyft / Taxi	26% DEGF	19% G	12%	16% G	11%	8%
Social media (sharing trip details / pictures)	19%	24% D	13%	18%	17%	18%
To make restaurant reservations	18% G	22% G	16%	26% BDG	18% G	11%
Capture / store receipts	17% G	16% G	12% G	13% G	18% G	6%
Track / manage expense reports	16% D	22% D	9%	17% D	21% D	3%
Currency converter	14%	31% BEG	29% BE	20%	24% B	20%
Book rail/train	13%	19%	25% B	34% BCG	30% BCG	21% B
Hotel room key	13% DG	13% G	7%	8% G	19% DG	3%
Online translation	11%	23% B	26% B	26% B	21% B	18% B
I do not use travel apps	10%	15% EF	18% BEF	8%	5%	26% BCDF

For which of the following purposes do you use travel-related apps? Please select all that apply.

Do companies recommend travel-related apps?

Most companies do not require or recommend travel apps. In each country surveyed, only one-fifth or fewer say their organization *has specific apps they require for business travel*. Another one-fifth to one-third say their organization *allows (them) to use (their) own preferred apps for business travel*. About half in each country say their organization *does not recommend any travel apps*.

Does your organization currently recommend travel-related mobile apps?	North America-based Business Travelers		Europe-based Business Travelers			
	 (n=498) B	 (n=252) C	 (n=245) D	 (n=250) E	 (n=224) F	 (n=247) G
My organization has specific apps they require for business travel	20% BDFG	13%	13%	12%	18%	13%
My organization allows us to use our own preferred apps for business travel	38% DG	34% DG	21%	36% DG	36% DG	19%
No, my organization does not recommend any travel apps	46%	49%	54% B	50%	49%	59% BCEF
Not sure	4%	9%	18% BCEFG	6%	4%	11% BEF

Does your organization currently recommend travel-related mobile apps? **Please select all that apply.**

The limited efforts by most Travel Managers to require or promote travel apps may contribute to low usage rates for TMC and expense management apps (see pp. 15-16). However, Elizabeth West notes in *Business Travel News* that some Travel Managers have reservations about undertaking these efforts. Some worry about facing liability for data security breaches, or needing to provide IT support for recommended apps⁵. However, Travel Managers should also consider the costs of remaining idle. They could miss an opportunity to curb out-of-policy behavior that travelers might engage in when they use their own favorite apps.

Mobile payment







In 2014, the GBTA Foundation surveyed more than 240 U.S.-based Travel Managers, and found that they had “lukewarm” interest in adopting mobile payment technology.⁶ While almost seven out of 10 were at least “somewhat interested” in adopting mobile payments, only 40% were “interested” or “very interested.” However, another study, conducted last year, found that two-thirds (66%) of U.S.-based Travel Managers felt “alternative forms of payment technology” would become a higher priority “in their

⁵ Elizabeth West, “GBTA: Business Travelers Want Their Companies to Recommend Travel Apps,” *Business Travel News*. September 25, 2015, <http://www.businesstravelnews.com/Travel-Management/GBTA-Business-Travelers-Want-Their-Companies-To-Recommend-Travel-Apps>.

⁶ GBTA Foundation, *Payment Solutions for Travel Managers (United States)*, GBTA Foundation (Alexandria, VA: GBTA Foundation, 2015), p. 38.

role as a Travel Manager” in the next three to five years.⁷ This is higher than other significant priorities—such as “globalization of your travel program,” “justification of a managed travel program,” and the “need to address regulation issues.”

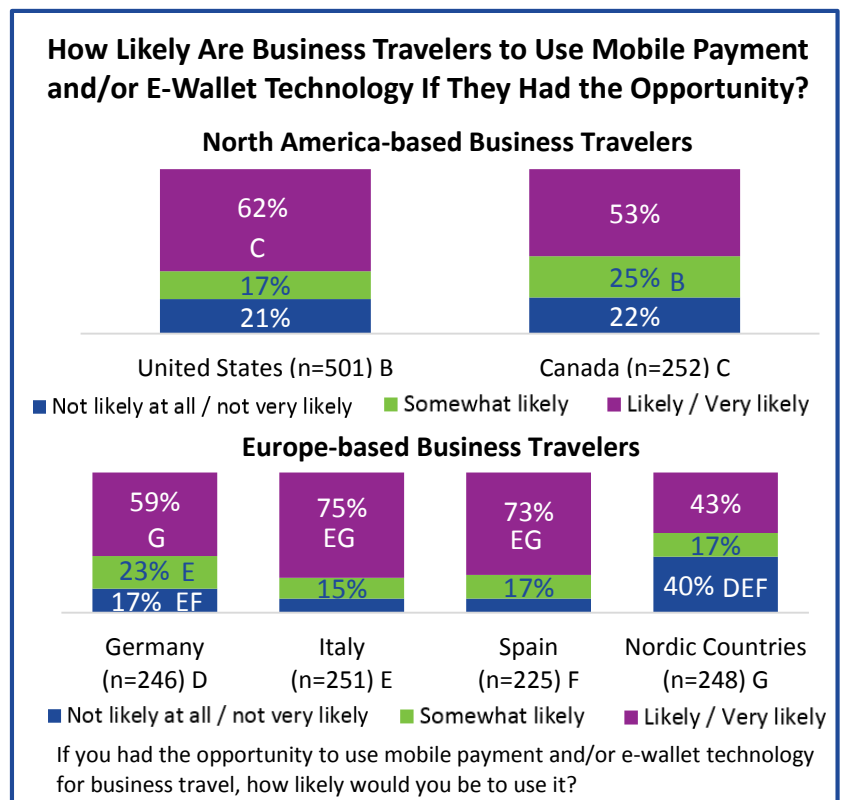
Business travelers overwhelmingly use traditional methods to pay for their expenses. In the current survey, majorities in each country typically use their personal credit card to pay for “business-related expenses while on a business trip.” Similarly, at least two out of five typically use a corporate card to pay for these expenses. Roughly one-fifth of North America-based travelers use cash to pay for these expenses, much lower than the rate in Germany, Italy, and Spain.

How Do Business Travelers Typically Pay for Business-related Expenses While on a Business Trip?	North America-based Business Travelers		Europe-based Business Travelers			
	 (n=490) B	 (n=248) C	 (n=244) D	 (n=248) E	 (n=223) F	 (n=244) G
Personal credit card	59%	62% F	54%	64% DF	51%	62% F
Corporate business card	53%	50% E	44%	40%	53% E	44%
Cash	20%	23%	40% BCG	38% BCG	45% BCG	16%
E-wallet (mobile payment)	11%	7% D	3%	8% D	9% D	2%
Virtual payment	10%	10%	9%	13% G	20% BCDF	5%







How do you typically pay for business related expenses while on a business trip? **Please select all that apply.**

Even though business travelers do not commonly use mobile payment or e-wallet technology, many would likely use it if they had the opportunity. The share who would likely do so ranges from 43% (Nordic countries) to 75% (Italy).

However, these figures mask significant age differences. In general, Baby Boomers are less likely to use mobile payment if they had the opportunity, compared to Millennials and Gen-X travelers.



⁷ GBTA Foundation, *Travel Manager 2020: Foundational Shifts in the Role of the Travel Manager* (Alexandria, VA: GBTA Foundation, 2015), p. 8.

Percentage Who Would "Likely" / "Very Likely" Use E-wallet Technology / Mobile Payment	18 to 34	35 to 54	55 or over
	B	C	D
 (n=103-258)	79% CD	58%	47%
 (n=52-126)	64% D	56% D	31%
 (n=55-121)	73% CD	57%	48%
 (n=36-156)	83% D	75% D	58%
 (n=25-137)*	76% D	76% D	54%
 (n=50-137)	52% D	43%	29%







If you had the opportunity to use mobile payment and/or e-wallet technology for business travel, how likely would you be to use it?

* Small sample size (n<30) for Spain-based travelers 55 or older

Traveler safety / duty of care apps

Some mobile apps—commonly developed by TMCs or third-party safety or security firms— can assist with duty of care. When travelers have these apps, they can check-in with their company upon arrival at their destination or in an emergency, or allow their company or TMC to track their location and send push notifications in an emergency. In general, however, only a small share of travelers use these apps.

In most countries surveyed, one-fifth to one-fourth of business travelers have used a mobile app to *check-in with (their) company at various points during their trip in the past year*. The one exception is Spain where roughly one-third used a mobile app for this purpose. Even fewer have used a mobile app *that allows (their) company to track (their) location*. In addition, while a decent share of business travelers have called or emailed their company to request assistance in the past year, fewer than 15% in each country have used a mobile app to request assistance.

Usage of Technology for Duty of Care in the Past 12 Months	North America-based Business Travelers		Europe-based Business Travelers			
	 (n=495) B	 (n=252) C	 (n=244) D	 (n=247) E	 (n=223) F	 (n=246) G
I've called or emailed my company to check-in during my trip	43% DF	41% DG	17%	44% DG	50% DG	19%
My organization does not have the technology to track me during any of my business trips	25% EF	24% EF	29% EF	16%	12%	39% BCDEF
I've used a mobile app to "check-in" with my company at various points during my trip	25% G	24%	19%	20%	36% BCDEG	17%
I've used a mobile app that allows my company to track my location	17%	15% G	10%	15% G	19% DG	9%
I've used a mobile app to request emergency assistance	13% G	10%	10%	12% G	12% G	5%
I've called or emailed my company to request emergency assistance	8% DG	9% G	7%	10% G	9%	4%
None of the above	22%	25%	36% BCEF	25%	23%	33% BF

In the past 12 months, which of the following have applied? **Please select all that apply.**

While most travelers do not use these apps, a majority would allow their company to track their location via their mobile device for duty of care purposes. This includes three-fifths of travelers in the United States and Canada. Surprisingly, the share is at least that high in Germany, Italy, and Spain—EU countries that likely have stronger privacy norms.

Would Business Travelers Let their Company Track Their Location Via their Mobile Phone for Duty of Care?

■ Yes ■ No

North America-based Business travelers



(n=414) B



(n=215) C



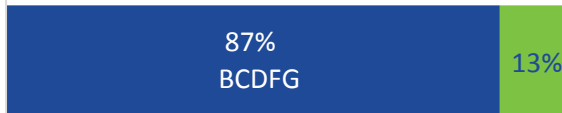
Europe-based Business travelers



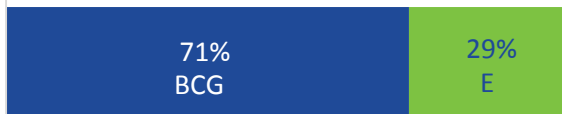
(n=218) D



(n=213) E



(n=178) F



(n=226) G









Would you be willing to allow your organization to track your location via your mobile phone while traveling for business should they need to reach you in the event a security or weather related issue and they had the technology to do so?

Itinerary Management







When business travelers change their itinerary while traveling, they often use a mobile app to do so. In North America, two out of five travelers say they *make changes (themselves) through a mobile app* when they “are traveling and need to proactively update their trip.” In the European countries surveyed, the share ranges from one-fifth to one-third.

This may pose a challenge given the low usage of TMC apps (see pp. 13-14). It likely means that many travelers are updating their itineraries using supplier or OTA apps. If travelers would otherwise call their travel agency or department to make the change or use a corporate online booking tool, this is especially concerning. It could mean the mobile apps they use increase out-of-program behavior.

How Do Business Travelers Update Their Itinerary While on a Trip?	North America-based Business Travelers			Europe-based Business Travelers		
	 (n=491) B	 (n=251) C	 (n=246) D	 (n=251) E	 (n=225) F	 (n=244) G
Reach out to the airline or hotel	55% DEFG	53% DEFG	39%	33%	39%	36%
Make changes myself through a mobile app	39% DG	42% DG	26%	32% G	30% G	20%
Reach out to my administrative assistant or an internal company resource	19%	30% BG	33% BEG	24% G	26% BG	16%
Reach out to my organization’s travel agency or travel management company	23%	28%	30% B	27%	34% BC	27%
Reach out to my organization’s travel manager / travel department	23%	26%	26%	28%	28%	26%
None of the above	6%	4%	7%	6%	4%	13% BCDE

What steps do you take when you want to proactively make a change to your itinerary while on the trip? **Please select all that apply.**

Business travelers were also asked to identify the one method that best describes how they monitor their itinerary while traveling. In every country except Spain, they more commonly monitor their itinerary online than through a mobile app.

How Do Business Travelers Monitor Their Itinerary While Traveling?	North America-based Business Travelers			Europe-based Business Travelers		
	 (n=491) B	 (n=251) C	 (n=244) D	 (n=249) E	 (n=223) F	 (n=244) G
Checking online	51% F	61% BEFG	56% FG	52% F	26%	45% F
Checking a mobile app	34% CDG	19%	22%	32% CDG	34% CDG	19%
Phone system	5%	9% B	6%	7%	13% BDEG	7%
Screens at the airport	9%	8%	10%	9%	26% BCDE	28% BCDE

Which of the following **best describes** how you monitor your travel itinerary when traveling for business?

CONCLUSION

Technological innovation has given business travelers greater control of their own travel, which doesn't need to equate as trouble for a managed travel program. In the contrary, Travel Managers can use the travelers' embrace of mobile technology to remain closer to the travelers when they are on the road. Being able to assist with minor incidents as rebooking a flight or changing a hotel reservation, to reminding travelers of their travel policy on the go, to tracking them in case of emergency all are benefits for both the traveler and the Travel Manager and can be accomplished with mobile technology.

In general, business travelers have embraced this trend. In each country surveyed, a majority of travelers would *manage (their) business travel using self-service technology*, rather than *work with (their) organization's travel agency (or internal travel department)*. But for many Travel Managers, however, this trend could pose a challenge. In many cases business travelers use supplier and online travel agency (OTA) apps at a much higher rate than TMC, expense management, and safety / security apps. As a result, when travelers have greater control, they could be more likely to engage in out-of-policy behavior.

In most countries surveyed, one-fifth of travelers or fewer say their *organization has specific apps they require for business travel*, and still adoption of these apps is low, a larger share indicate *(their) organization allows (them) to use their own preferred apps for business travel* or *(their) organization does not recommend any travel apps at all*.

If this trend is here to stay, Travel Managers should make sure all the right tools and policies are in place to maintain the control and visibility needed while supporting the traveler's needs and preferences.

The opportunity is there for travel programs to adopt a mobile strategy that resonates with their travelers, as the Digital Traveler can only move travel programs forward in the future.

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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 5,000-plus members manage over \$340 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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