



MAXIMISING DUTY OF CARE

**CHOOSING YOUR SAFEST 'LAST MILE'
OPTION FOR BUSINESS TRAVEL**

FREENOW ✓
FOR BUSINESS

 **GBTA**

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INTRODUCTION

This study examines how travel programmes can maximise the safety of ground transport on business trips. It is based on a survey of business travellers and corporate travel managers in four European markets: Germany, the United Kingdom, Spain, and Ireland. It addresses a number of key questions including:

- **Perceptions of safety:**
Do business travellers think ground transport is more or less safe than air and rail transport?
- **“Managed” risk:**
How can travel programmes improve the safety of ground transport? What are areas where they most need to improve?
- **Choosing ground transport:**
Is safety viewed as important when choosing ground transport?
- **Modes of transportation:**
Which modes of ground transport do travel managers view as safest?

7 KEY TAKEAWAYS

Companies pursue measures to ensure the safety of business travel. However, these measures do not always extend to ground transport specifically.

- 01** A large majority of travel programmes (85%) have risk-related policies for business travel. However, only about half (55%) “always” or “often” address ground transport in these policies.
- 02** Most travel programmes (63%) conduct a formal analysis of their company’s unique “risk profile”, as recommended by ISO 31030 – the Travel Risk Management Standard. However, only two in five (41%) “always” or “often” include ground transport risks in this analysis.
- 03** Most travel programmes (62%) conduct regular safety trainings for employees about business travel. However only about half (56%) “always” or “often” include ground transport risks in these trainings.
- 04** Data is a particular weakness. Whilst a large majority of travel programmes (89%) have a traveller tracking system in place, only one-quarter (24%) can “always” or “often” track employees using ground transport data specifically. Companies can receive real-time data if they work with a ground transport technology company.

Travel risk protocols do not always adequately address ground safety.



7 KEY TAKEAWAYS

(Cont.)

Choosing safe ground transport is the simplest and most straightforward way to improve safety.

05 Taxis are viewed as the safest third-party mode of ground transport.

Travel managers were asked to rank the safest modes of ground transport for business travel. A larger number rank taxis (50%) as one of the two safest options than rental cars (43%) or public transit (26%).

06 Travel programmes can have a formal relationship, contract, or business account with a ground transport vendor.

They can prioritise safety when choosing their vendor(s) – and mandate or encourage employees to book with the vendor(s). Virtually all business travellers (94%) surveyed say such a relationship would increase efficiency.

07 When choosing ground transport vendors for their company, travel managers rate various safety features as important.

These include regular inspections/safety checks for vehicles (93%), working with well-known/ established brands (93%), and drivers with professional licenses/ qualifications (91%).

Taxis are viewed as the safest third-party mode of ground transport.



MAXIMISING DUTY OF CARE

‘LAST MILE’ SAFETY

A woman with grey hair and a man in a suit are sitting in the back of a car. They are both looking at a tablet computer held by the man. The woman has her hand near her chin, looking thoughtful. The man is pointing at the screen. The background shows the interior of the car and a window looking out onto a blurred city street.

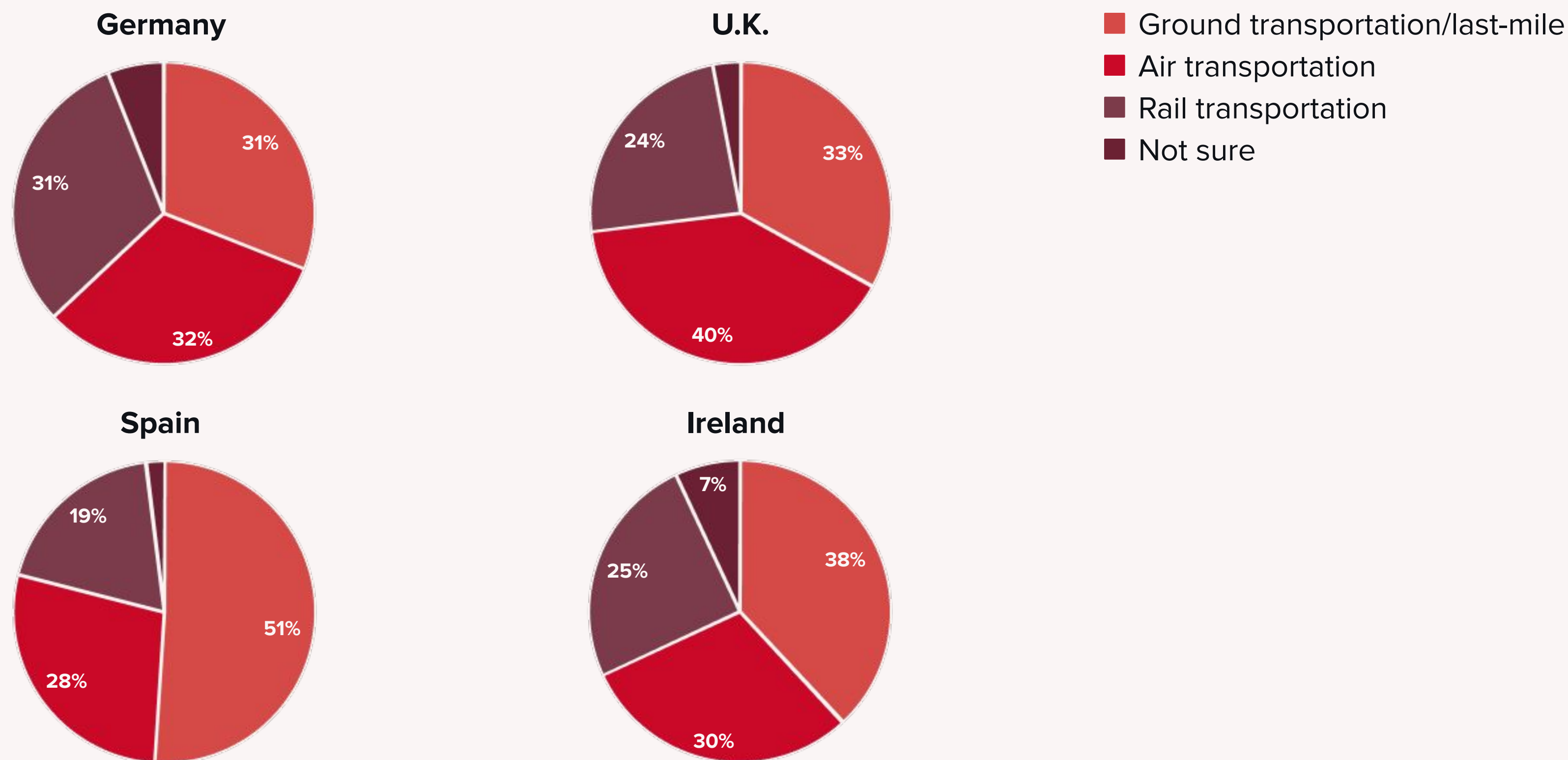
‘LAST MILE’ TRANSPORTATION

‘Last mile’ transportation refers to ground transportation trips that are taken over distances of 75 kilometres or fewer. Typically, these are rides taken in a taxi, rental car, private hire vehicle (PHV), or public transit.



MANY BUSINESS TRAVELLERS DO NOT HAVE AN ACCURATE VIEW OF TRANSPORTATION RISKS

Type of Transportation Most Likely to Experience a Safety-Related Incident During Business Travel



Most business travellers do not have an accurate view of transportation risks. Business travellers were asked which type of transportation is most likely to experience a safety-related incident or accident.

In three of the four countries surveyed (Germany, UK, and Ireland), fewer than half of business travellers say ground transport. A larger number falsely believe that either air or rail transport is more dangerous. **If business travellers do not fully understand the risk, they might not take adequate precautions.**

Q. Thinking about the following types of transportation, which of the following do you think is most likely to experience a safety-related incident or accident when employees are travelling for work?

A SHARED RESPONSIBILITY



Even though ground transportation is more dangerous than air transportation, the risk can be reduced. Employees and companies have a shared responsibility.

- **The traveller's responsibility:**

Employees have a responsibility to make smart choices while travelling. They should not drive when they are tired. They should not drive in a foreign country where they do not understand traffic laws or road signs. Employees should use safe modes of ground transport such as licensed taxis with professional drivers. Employees should exercise caution when walking in an unfamiliar city or country— especially when it is late at night, or they have consumed alcohol.

- **The company's responsibility:**

Companies have a responsibility to protect employees. They should require or encourage employees to use safe modes of ground transport. They should integrate ground transportation in Travel Risk Management (TRM) processes and protocols. Currently, many of these protocols do not adequately address ground-related risks. Given that more than nine in 10 traffic fatalities (92%) occur in low-income countries, companies should analyse risk at the country level – and ensure they have special measures in place for high-risk countries. Companies should work with trusted ground transportation companies that have a demonstrated safety record. They should educate employees about the risks of ground transportation. Many employees do not fully understand these risks – falsely believing that ground transportation is safer than air or rail travel (see previous page).

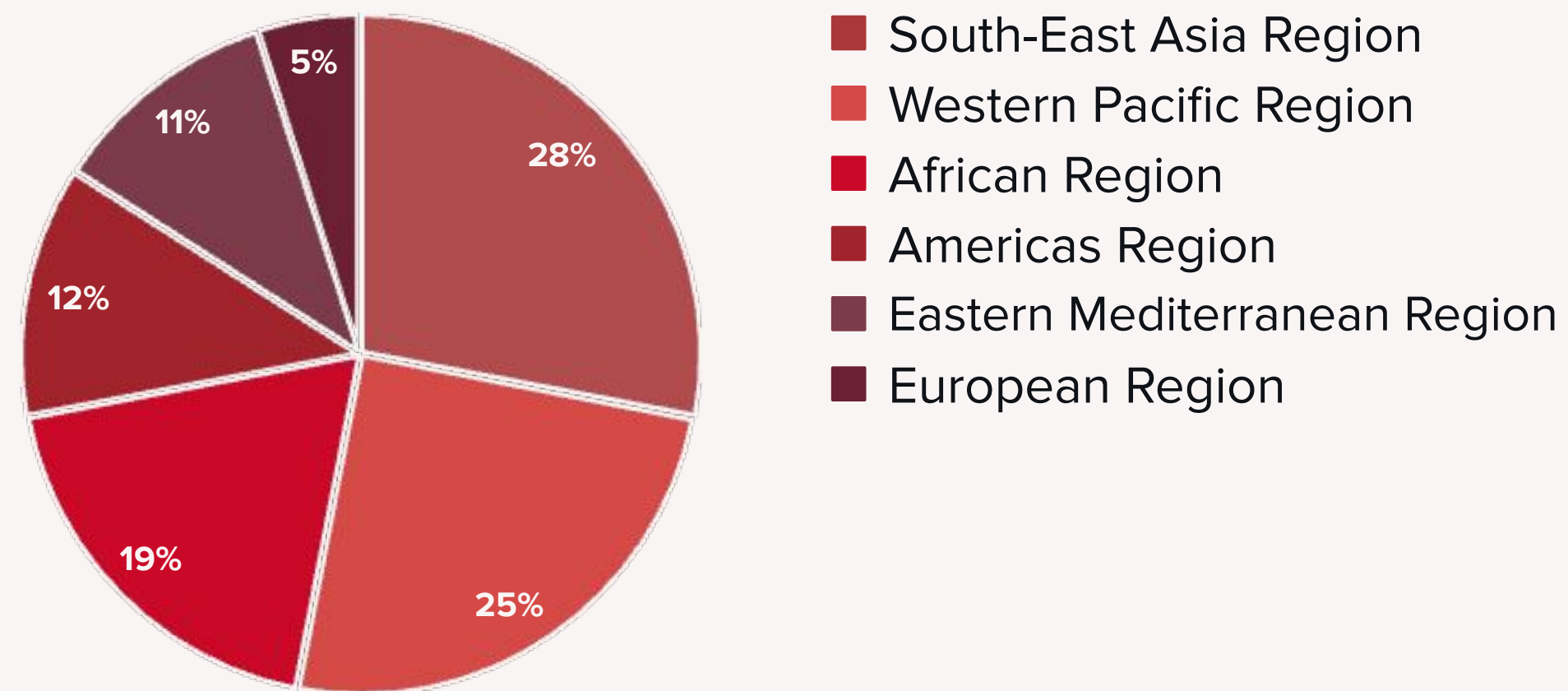


LAST MILE SAFETY: THE EUROPEAN REGION

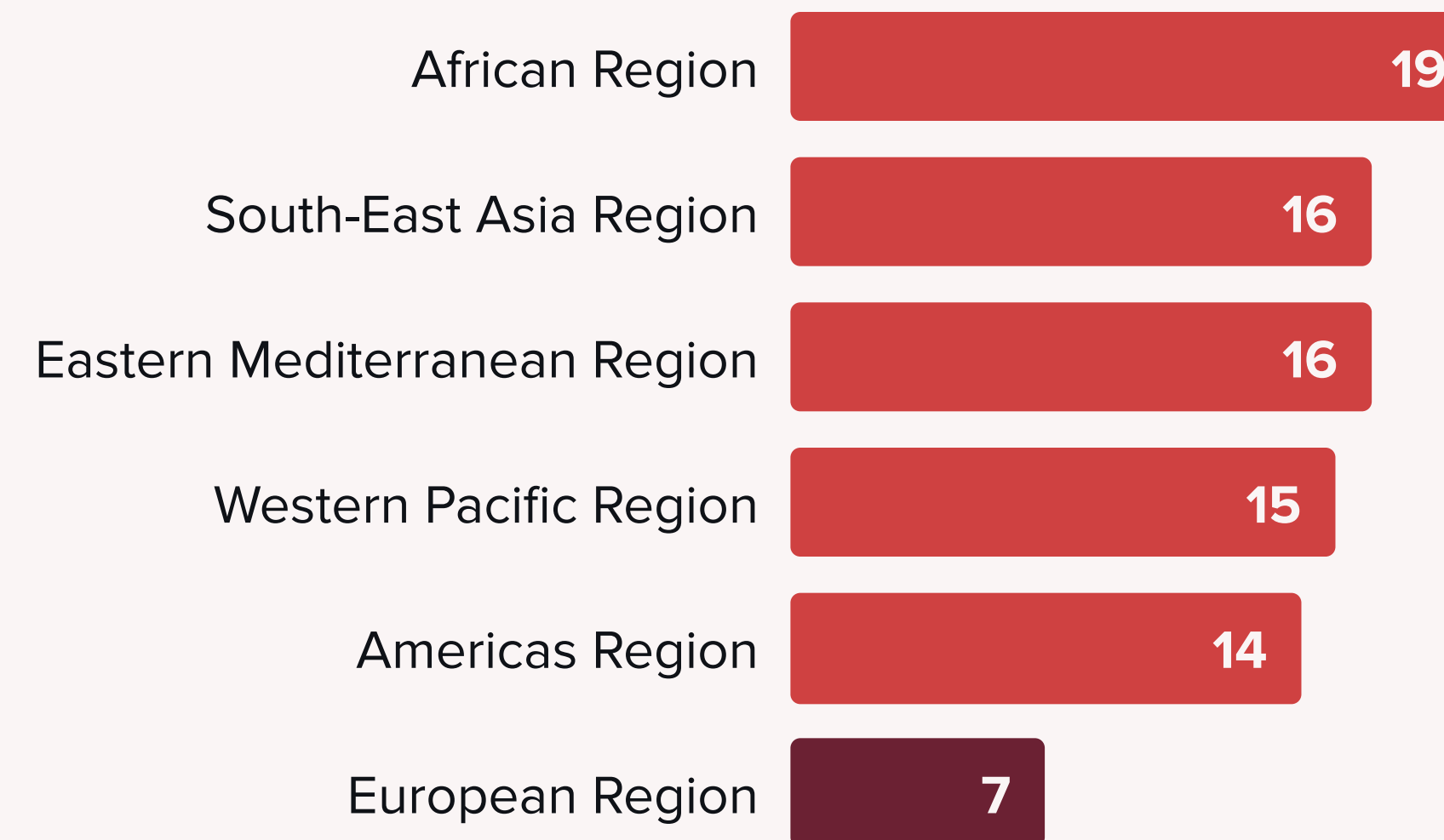
Roughly **59,500 people** in the European region died from road injuries in 2021. However, Europe has the safest roads in the world.

The European region accounted for **5%** of road fatalities globally in 2021

Traffic Fatalities by WHO Region



Fatalities per 100,000 population (2021)





EUROPE IS AT THE FOREFRONT OF TRAFFIC SAFETY – BUT TRAVEL BUYERS BEWARE

- **Europe at the forefront:**

Europe's roads are the safest in the world. In 2021, the European Region experienced seven traffic fatalities per 100,000 residents. This is lower than any other region. This could be driven by a number of factors including traffic laws, vehicles, the design or condition of roads and sidewalks, and population density.

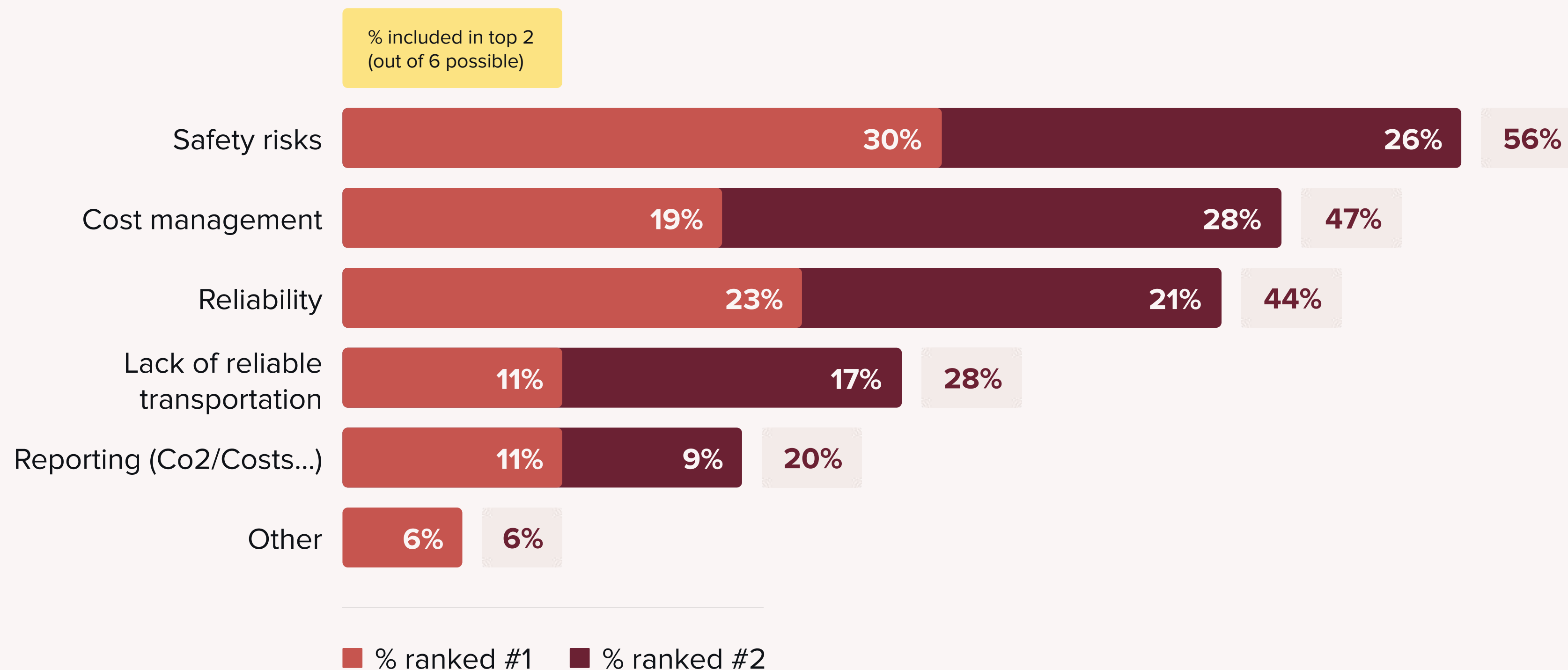
- **Travel buyers beware:**

Whilst traffic fatalities are less common in Europe, they are still common. Roughly 59,500 people in the European region still died from traffic injuries in 2021. Traffic accidents still represent the most significant risk that travel programmes face in the region. In addition, Europe's safe roads are a double-edged sword. European travellers might behave in ways that expose them to risk when they are travelling outside of Europe. For instance, they might be comfortable walking, biking, or scooting in urban areas. Even though these activities are generally safe in much of Europe, they could have a different risk profile outside of Europe where road conditions, traffic laws, and driver behaviour are different. Nonetheless, employees might engage in these activities because their perceptions of safety are shaped by their home countries.



SAFETY IS THE MOST PRESSING LAST MILE CHALLENGE

What Is the Most Significant Challenge Your Company Faces With Last-Mile Transportation?



Even though business travellers often do not fully acknowledge ground transport risks, travel managers say these risks are a significant challenge.

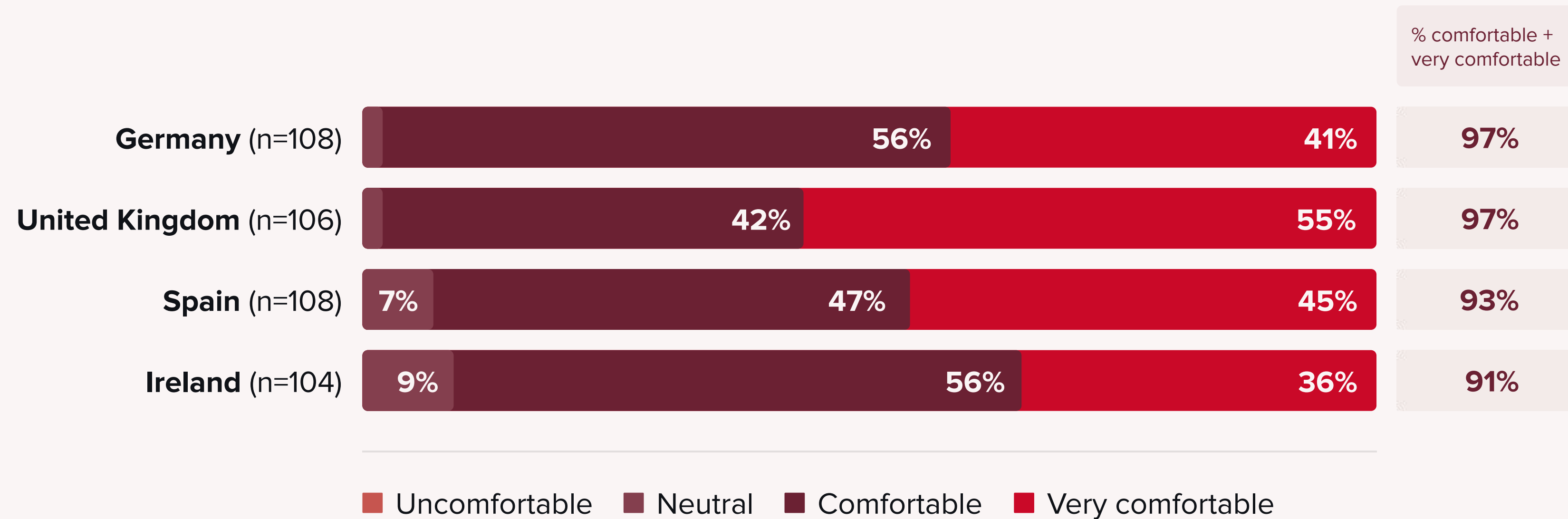
Travel managers were asked to rank the challenges that their company faces with ground transportation. More than half (56%) indicate safety risks are one of the top two challenges they face (out of six possible). This includes almost one-third (30%) who say safety risks are the single greatest challenge. Safety risks are mentioned at a much higher rate than other challenges.

TRAVEL RISK MANAGEMENT (TRM) AND GROUND TRANSPORT



MANY BUSINESS TRAVELLERS DO NOT HAVE AN ACCURATE VIEW OF TRANSPORTATION RISKS

Level of Comfort With Company's Last Mile/Ground Transportation Safety Measures



Business travellers are comfortable with the measures their company has in place to ensure the safety of ground transport. In all four countries surveyed, virtually all travellers are “comfortable” or “very comfortable” with the measures their company has in place. Yet is this comfort misplaced? Whilst companies have safety measures for ground transport, **these measures sometimes fall short**, as shown on the next seven pages.



TRAVEL RISK MANAGEMENT (TRM) BEST PRACTICES

Travel Risk Management (TRM) demands a proactive approach. Successful programmes not only respond to incidents; they prevent incidents from happening in the first place.

The most widely recognized framework for TRM best practices is a 47-page ISO standard published in 2021.

The current GBTA-FREENOW study examines (1) the extent to which companies follow best practices and (2) whether these practices account for last mile risks. In general, companies have robust policies and processes to manage travel-related risk. **However, these efforts do not always adequately account for last mile risks which could be the most serious travel-related risks that companies face.**



PROGRAMME DESIGN AND STRATEGY

Thinking About Your Organisation's Travel Risk Management Programme, Does It Perform the Following Practices?

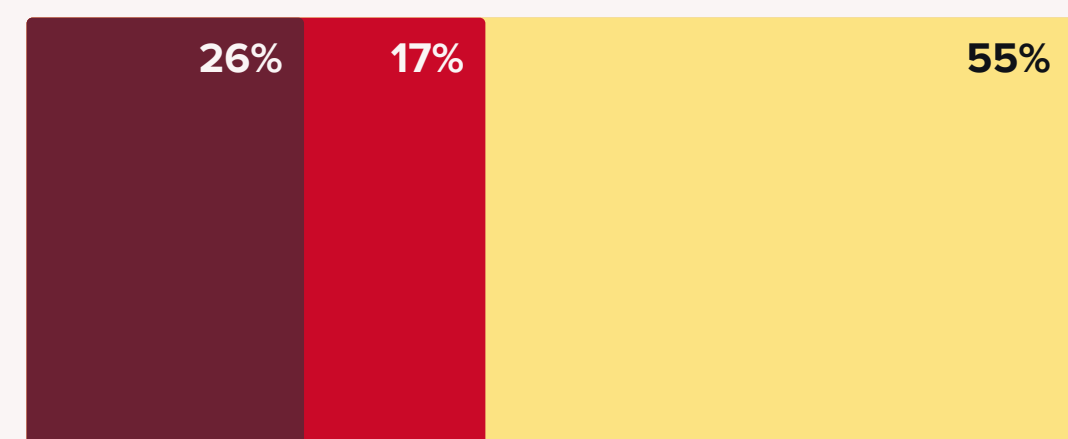
if "yes" →

How Often Do Travel Programmes....?

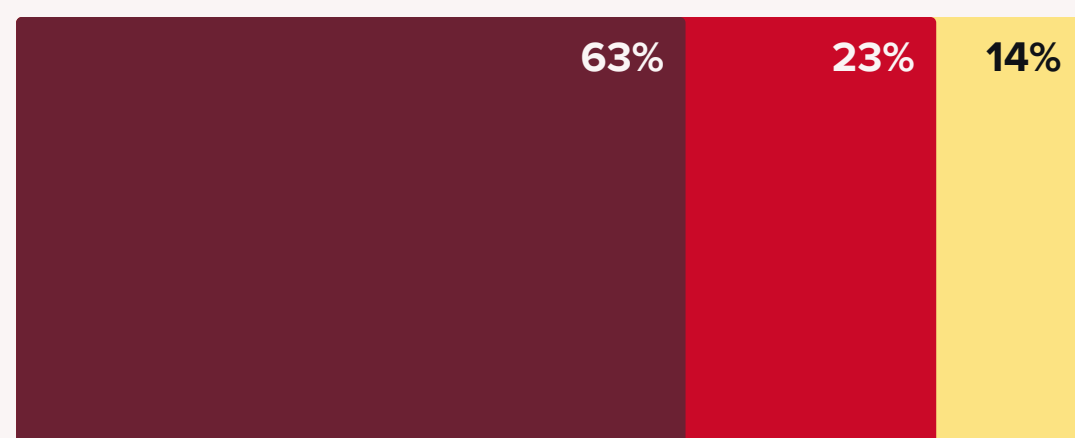
We address risk/safety in our regular travel policy or a separate TRM policy (n=65)



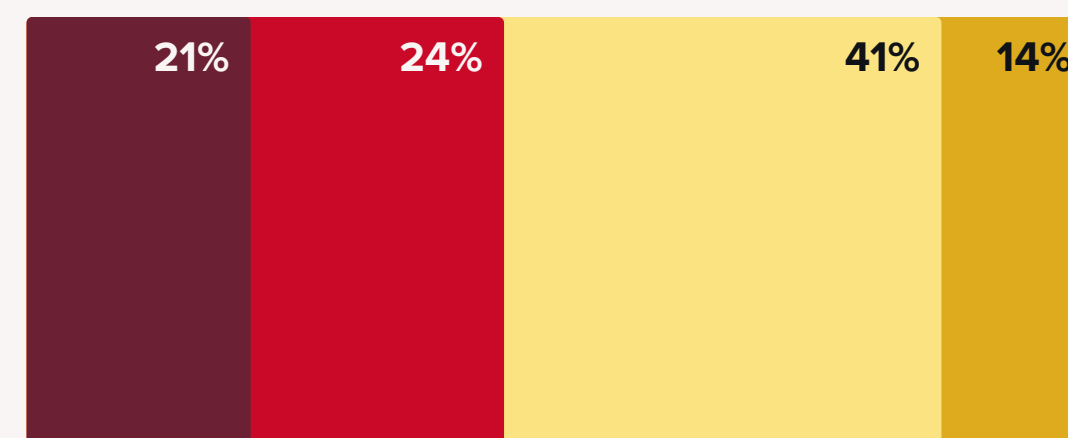
We cover the safety of ground transportation/ last mile in our regular travel policy or TRM policy (n=42)



We conduct a formal analysis of our organisation's "risk profile" based on factors such as top travel destinations, demographics of travelling population, and nature of work performed by employees when travelling (n=64)



Our analysis of our company's "risk profile" covers ground transportation/last mile-related risks (n=29*)



■ Yes ■ No ■ Not sure

■ Never/Rarely ■ Sometimes ■ Always/Often ■ Not sure

Companies widely have TRM policies. However, these policies sometimes overlook ground transport/last mile risks.

In the four countries surveyed, a large majority of travel programmes (85%) have TRM policies.

These policies can be written for employees and/or stakeholders involved with the TRM programme. However, these policies sometimes overlook last mile risks.

Only about half (55%) of travel managers say their company's policies "always" or "often" cover ground transport/last mile risks.

The ISO standard also recommends that companies conduct a formal analysis of their "risk profile." This exercise allows companies to identify the unique risks they face and prioritise resources accordingly. For instance, a company that travels to rural/remote areas might face different risks from a company that travels primarily in urban areas.

While most TRM programmes (63%) analyse their risk profile, **only two in five (41%) say this analysis "always" or "often" covers ground transport/last mile risks.**

Q. Thinking about Travel Risk Management (TRM), does your company have the following in place? (n=64-65)

Q. Thinking specifically about ground/last mile transportation, how often does your company do the following?

Note: Respondents only asked about policies or processes that they previously indicated their company has in place

*** Indicates small sample size (n<30) for travel managers who say their company analyses its risk profile**



BOOKING, DATA, AND TRACKING

Thinking About Your Organisation's Travel Risk Management Programme, Does It Perform the Following Practices?

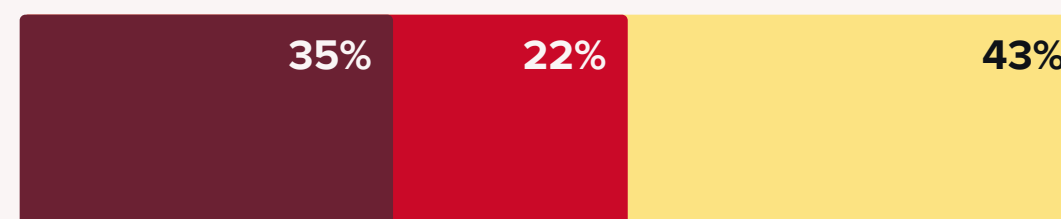
if "yes" →

How Often Do Travel Programmes....?

We mandate booking through managed corporate channels (e.g., TMC or corporate booking tool) (n=64)



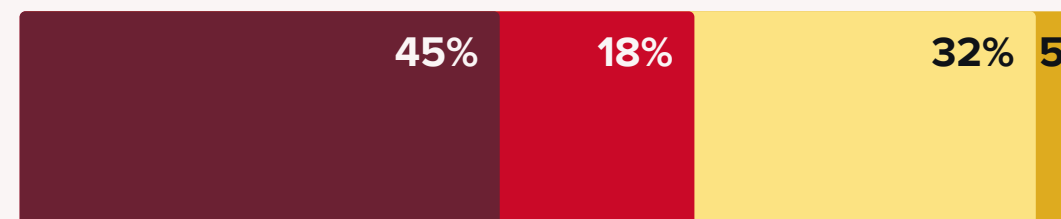
We mandate booking ground transportation/ last mile trips through specific channels (n=46)



We use risk management/traveller tracking software/technology (n=66)



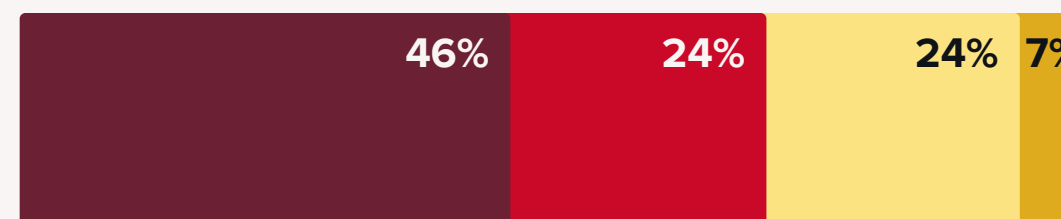
We can track ground trips/last mile trips using our risk management/ traveller tracking software/ technology (n=44)



We have in place a traveller tracking system that we can use to locate employees based on itinerary data, expense data, GPS data, or employee "check-ins" (n=65)



We can track/locate travelling employees using ground transportation/last mile data (n=46)



Yes No Not sure

Never/Rarely Sometimes Always/Often Not sure

Companies collect critical data that they use for risk management.

However, they have limited data about ground transportation specifically.

Only one-quarter of travel managers (24%) say their company can "always" or "often" track travelling employees using last mile data.

Q. Thinking about Travel Risk Management (TRM), does your company have the following in place?

Q. Thinking specifically about ground/last mile transportation, how often does your company do the following?

Note: Respondents only asked about policies or processes that they previously indicated their company has in place

THE “MISSING LINK”



- **The central role of the booking process:** The booking process is the foundation of a successful TRM programme. It allows companies to collect data. Companies use this data to perform critical risk management functions. These include (1) conducting pre-trip approvals to decide if a trip is safe enough to actually happen; (2) deciding if a trip needs additional risk mitigation measures such as a pre-trip briefing; (3) locating or assisting employees in an emergency; and (4) analysing the company’s travel patterns to assess its “risk profile”. Most companies have an effective booking process that allows them to collect data.
- **The “missing link:”** However, companies collect limited data about ground transport specifically. Fewer than half of travel programmes (43%) “always” or “often” mandate booking ground transport through specific channels. Only one-quarter of travel managers (24%) say their company can “always” or “often” track/locate travelling employees using ground transport/last mile data.
- **What are the implications?** For travel programmes, missing last mile data poses a number of challenges. It can be difficult to recognize—and intervene—when employees are using unsafe ground transport. It can be difficult to precisely locate employees in an emergency. And it can be difficult to analyse the company’s ground transport patterns and identify (and address) potential safety concerns.
- **What’s the solution?** Travel programmes can work with trusted vendors that provide data. Some taxi and ride-hailing technology platforms allow companies to track employee rides. They also provide reporting that allows companies to analyse travel patterns and identify potential safety concerns – such as a large number of late-night rides, or rides in unsafe cities/neighborhoods. Companies can mandate or recommend booking with these “preferred” platforms. Vendor relationships (FREENOW for Business) are discussed in greater detail on page 46.



PRE-TRIP INFORMATION

Thinking About Your Organisation's Travel Risk Management Programme, Does It Perform the Following Practices?

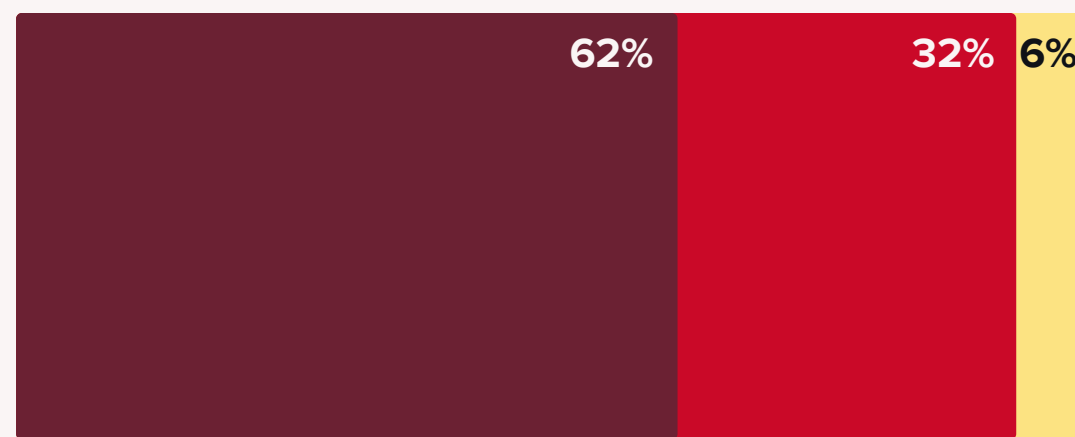
if "yes" →

How Often Do Travel Programmes....?

We provide pre-trip briefings/information packets for high-risk trips (n=65)

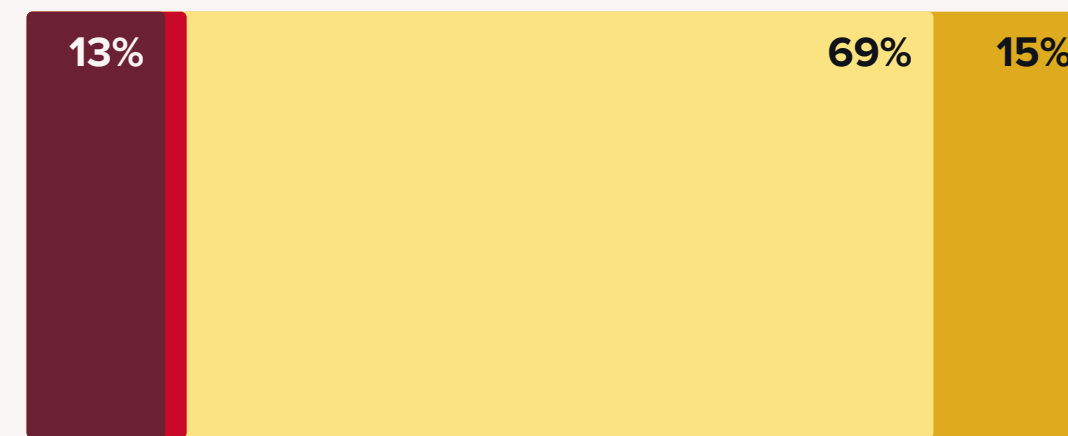


We conduct regular safety trainings (n=64)

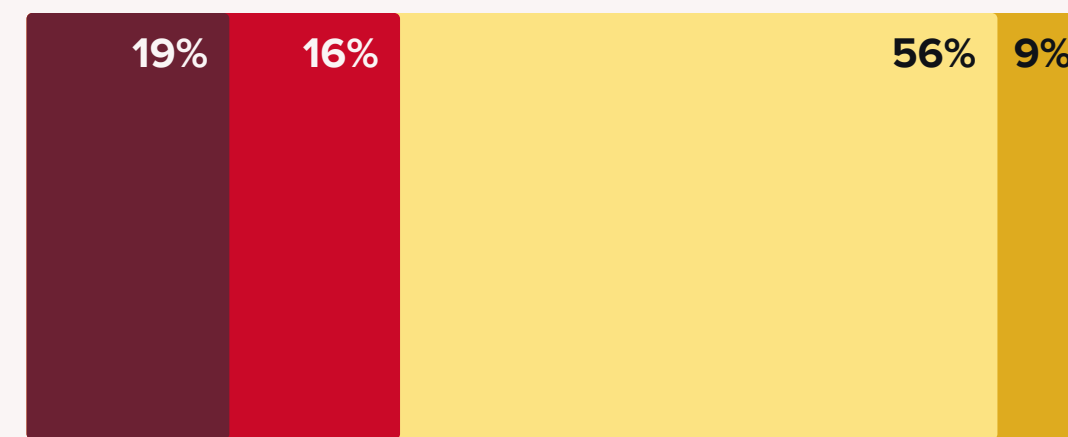


■ Yes ■ No ■ Not sure

We cover ground transportation/last-mile transportation in our pre-trip briefings for high-risk trips (n=39)



We cover ground transportation/last mile transportation in our regular safety trainings (n=32)



■ Never/Rarely ■ Sometimes ■ Always/Often ■ Not sure

A successful TRM programme gives employees information needed to make prudent decisions.

Companies provide trainings and briefings. However, these do not always cover ground transport.

Three in five travel programmes (62%) conduct regular safety trainings about business travel. However, only about half of these programmes (56%) "always" or "often" cover ground transport in their trainings. A decent number (35%) say their trainings sometimes, rarely, or never, cover ground transport.

Q. Thinking about Travel Risk Management (TRM), does your company have the following in place?

Q. Thinking specifically about ground/last mile transportation, how often does your company do the following?

Note: Respondents only asked about policies or processes that they previously indicated their company has in place



ASSESSMENTS AND APPROVALS

Thinking About Your Organisation's Travel Risk Management Programme, Does It Perform the Following Practices?

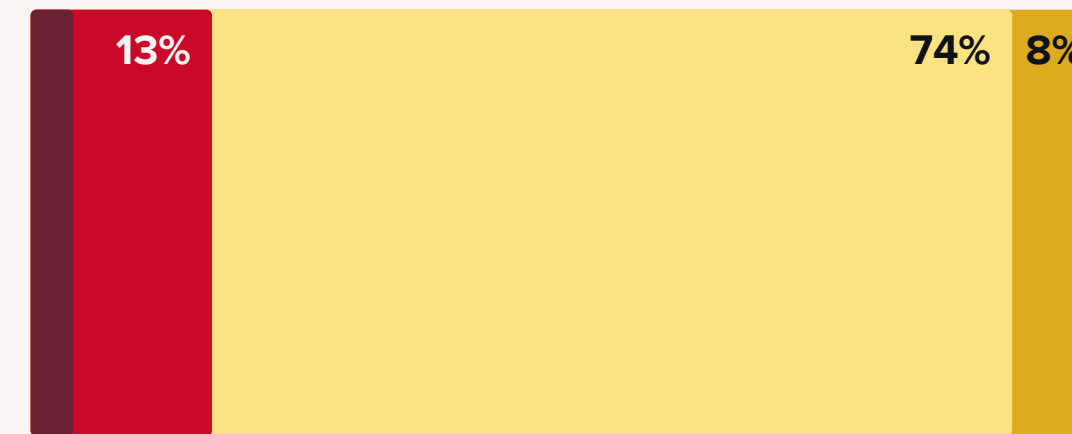
if "yes" →

How Often Do Travel Programmes....?

We perform risk assessments for trips to high-risk destinations (n=65)



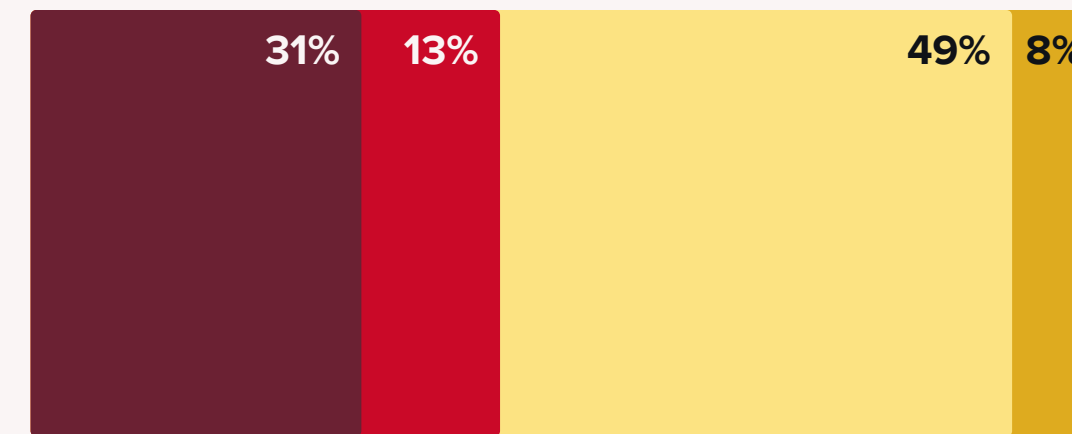
We consider ground transportation/last mile risks when conducting risk assessments for trips to high-risk destinations (n=39)



We require pre-trip approvals for some/all trips (n=67)



We consider ground transportation/last mile risks when conducting pre-trip approvals (n=39)



Yes No Not sure

Never/Rarely Sometimes Always/Often Not sure

Companies conduct special reviews of high-risk trips.

Four in five travel programmes (82%) perform risk assessments for trips to high-risk destinations. These assessments determine whether it is safe to travel - and if additional safety measures are needed. Ground transport is typically considered in these assessments.

In addition, most programmes (79%) require pre-trip approvals for some/all trips. Managers evaluate the purpose of travel – and determine whether the trip is important enough to justify the risk and cost involved. Ground transport is only sometimes considered in these approvals.

Q. Thinking about Travel Risk Management (TRM), does your company have the following in place?

Q. Thinking specifically about ground/last mile transportation, how often does your company do the following?

Note: Respondents only asked about policies or processes that they previously indicated their company has in place



INCIDENT PREPARATION/RESPONSE

Thinking About Your Organisation's Travel Risk Management Programme, Does It Perform the Following Practices?

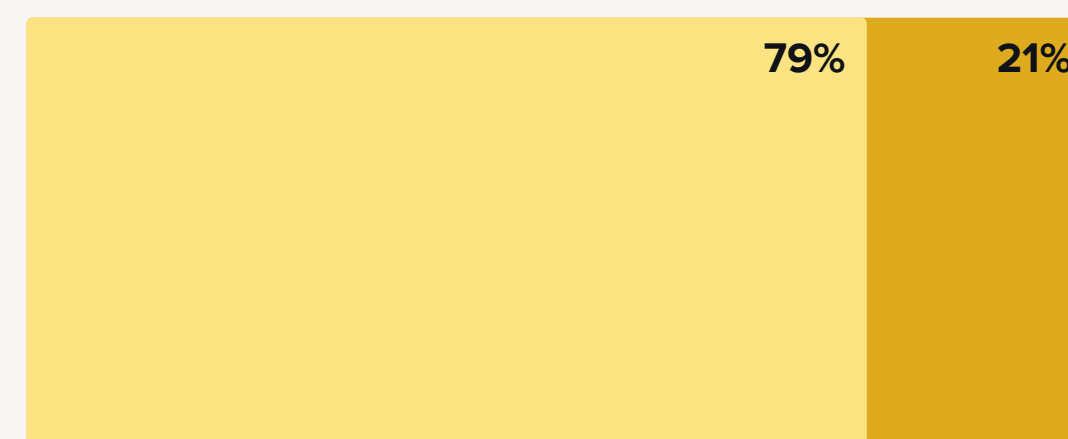
if "yes" →

How Often Do Travel Programmes....?

We have in place travel insurance for some/all trips (n=65)



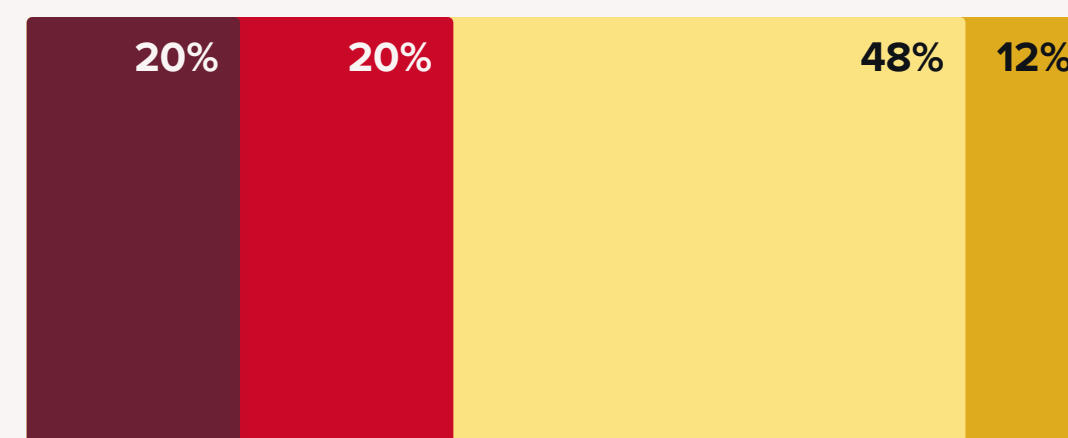
Our travel insurance covers ground transportation/last mile-related risks (n=47)



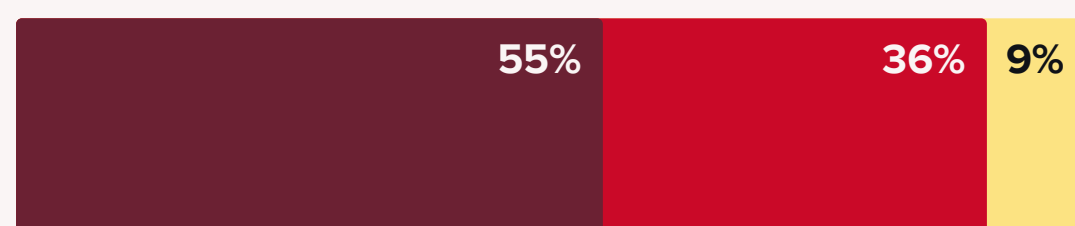
We monitor risks (e.g., crime statistics, geopolitical developments) worldwide or in our top travel destinations on an ongoing basis (n=65)



We practice how our organisation would respond to ground transportation/last mile-related emergencies (n=25*)



We conduct regular exercises to practice how our organisation responds in an incident/crisis (n=64)



■ Yes ■ No ■ Not sure

■ Never/Rarely ■ Sometimes ■ Always/Often ■ Not sure

Companies prepare for incidents.

Virtually all travel programmes (92%) have travel insurance in place for at least some trips. More than four in five (83%) monitor risks on an ongoing basis.

About half of travel programmes (55%) conduct regular exercises to practice how they would respond in an incident/crisis. However, when travel programmes do practice incident response, fewer than half (48%) “always” or “often” rehearse how they would respond to ground transport incidents – **even though these are the incidents they are most likely to actually face.**

Q. Thinking about Travel Risk Management (TRM), does your company have the following in place?

Q. Thinking specifically about ground/last mile transportation, how often does your company do the following?

Note: Respondents only asked about policies or processes that they previously indicated their company has in place

CHOOSING SAFE GROUND TRANSPORT



CHOOSING SAFE GROUND TRANSPORT



Companies can improve how they manage risk from ground transport. Some measures take time and effort to implement. Yet one of the most impactful measures is fairly simple and straightforward. **Companies should use safe ground transport.** They should use safe modes of transport—such as licensed taxis—and work with specific companies that prioritise safety and have a demonstrated track record.

Business travellers and travel managers prioritise safety when choosing ground transport.

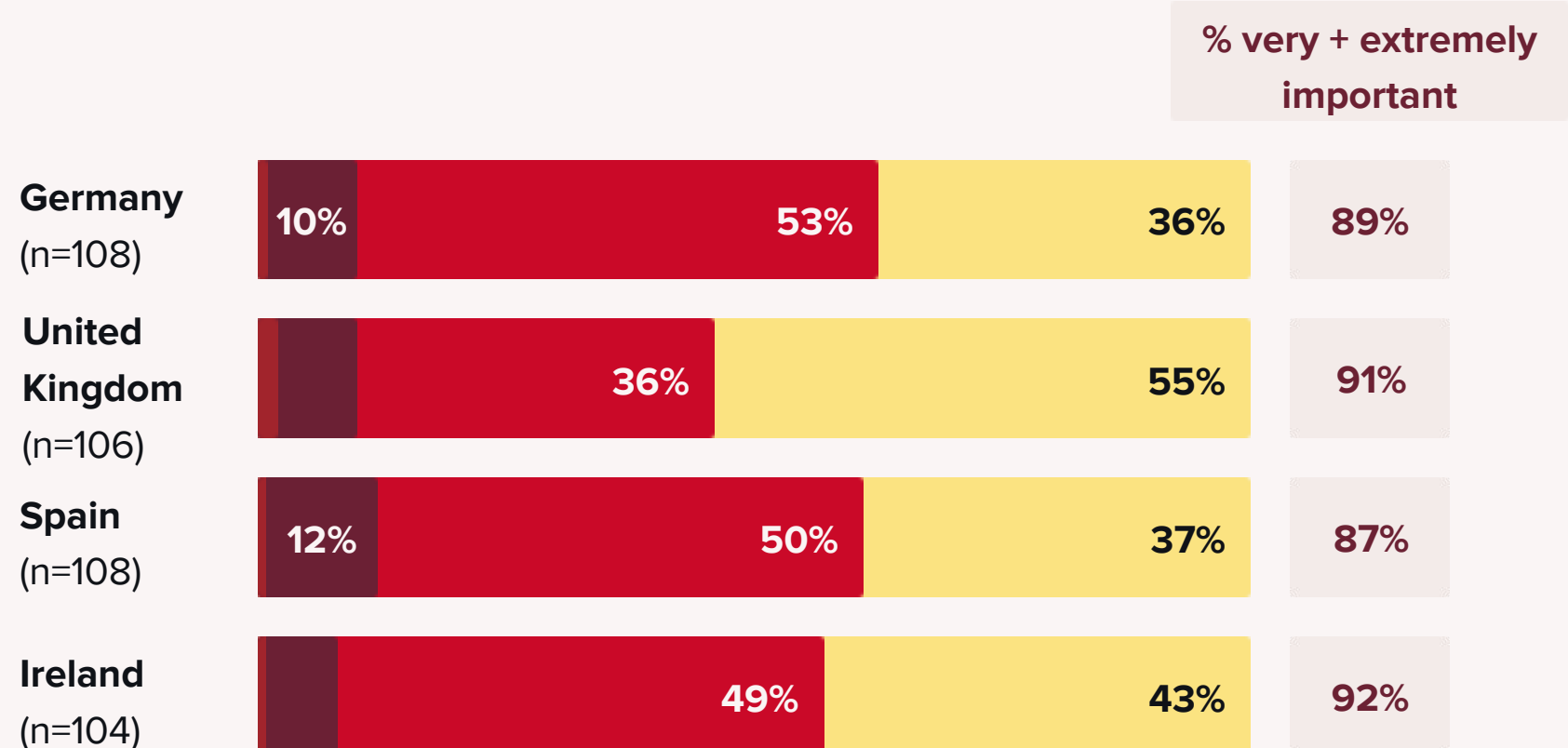


BUSINESS TRAVELLERS PRIORITISE SAFETY WHEN CHOOSING GROUND TRANSPORT

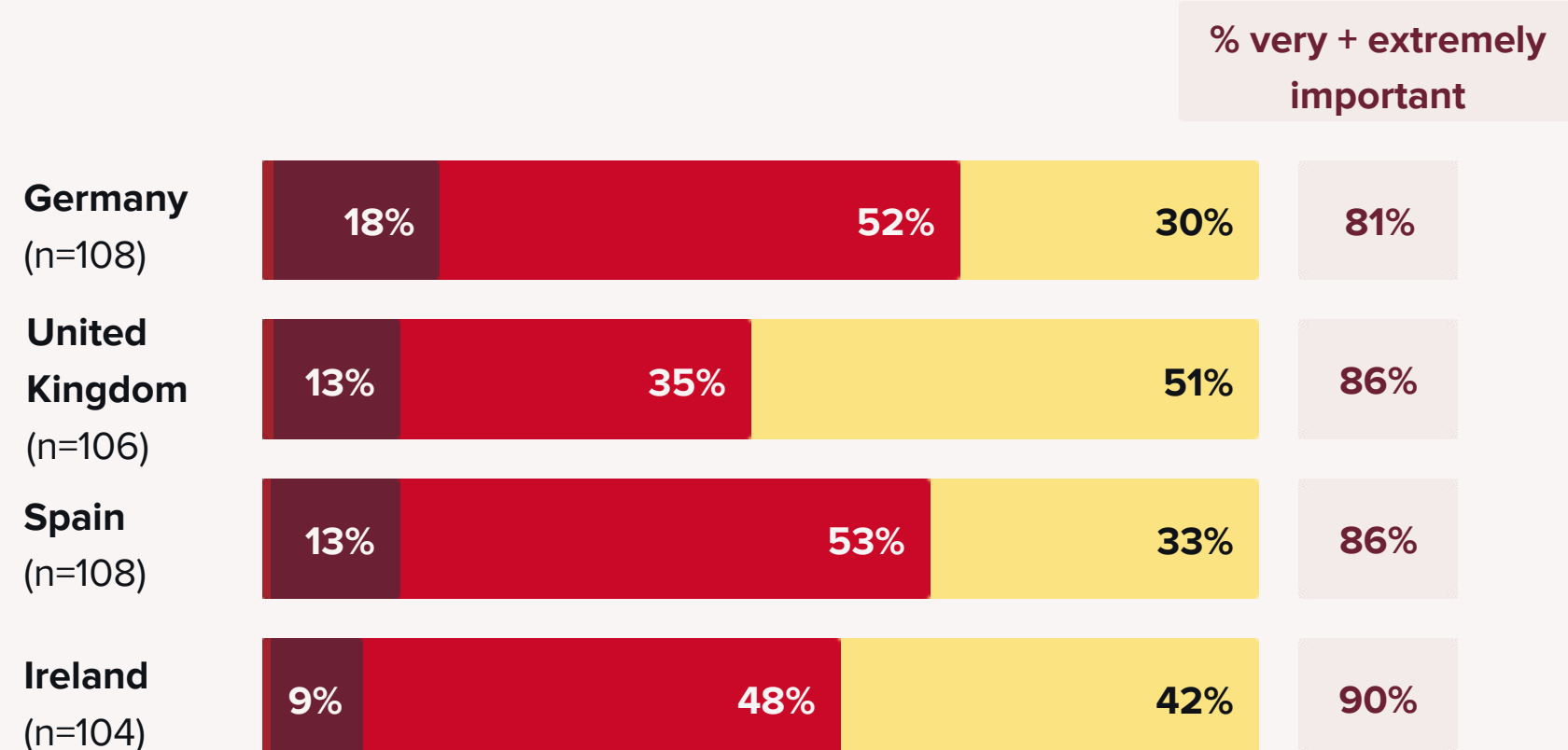
Importance of Safety When Choosing...



Specific modes of transportation when travelling for work



Specific ground transport providers/vendors when travelling for work



■ Not important
 ■ Moderately important
 ■ Very important
■ Extremely important

■ Not important
 ■ Moderately important
 ■ Very important
■ Extremely important

Business travellers prioritise safety when choosing ground transport. An overwhelming majority say it is “very” or “extremely” when choosing modes of transport — such as licensed taxis or rental cars—as well as specific vendors.



SAFETY MATTERS WHEN CHOOSING LAST MILE VENDOR(S)

What Criteria Are Most Important When Selecting a Travel Vendor for Last-Mile Solutions?

% included in top 2 (out of 6 possible)



70%

Safety records



57%

Service quality



35%

Cost-effectiveness



28%

Vehicle quality



11%

Environmental sustainability

Safety is also important to travel managers. It influences the choices they make about ground transport for their programmes.

Seven in 10 travel managers (70%) say safety records are one of the two most important criteria that they consider when selecting a vendor for ground transport.

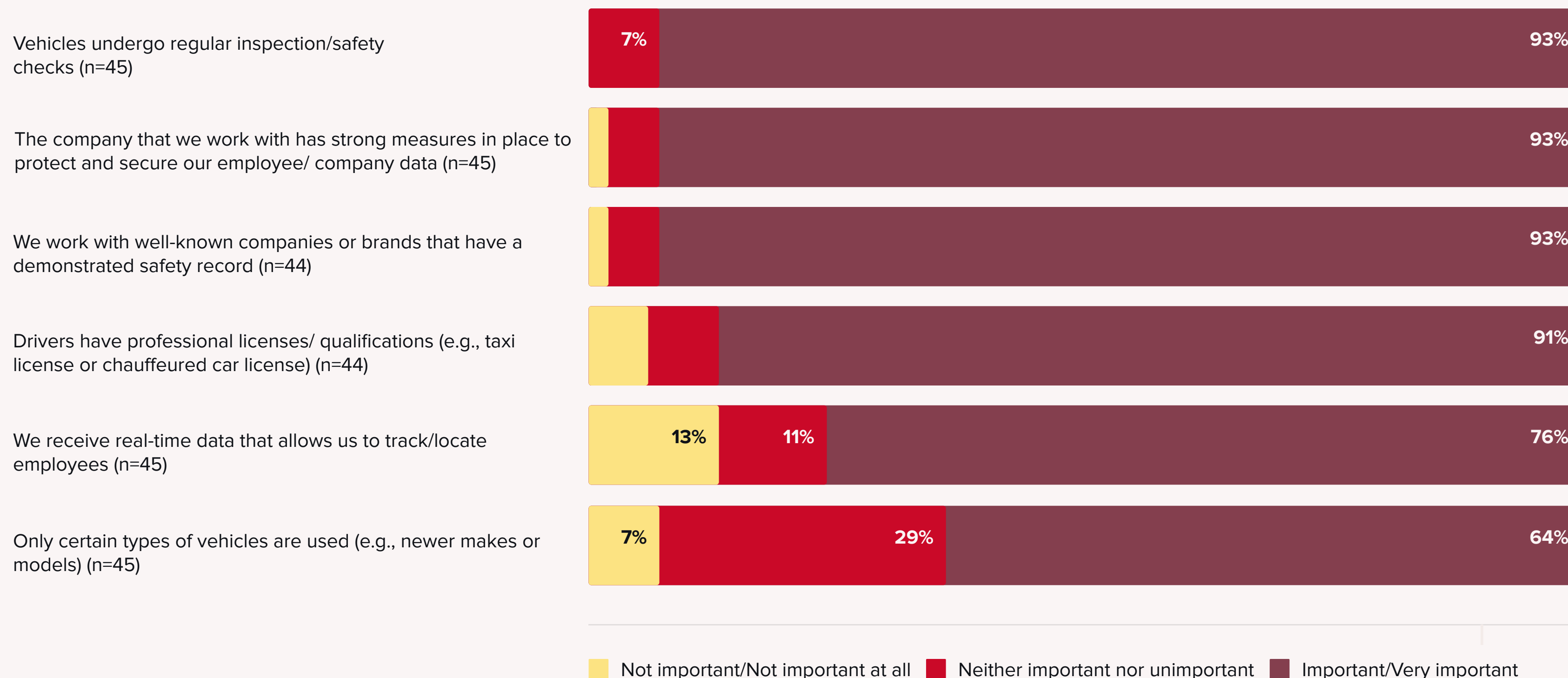
This is higher than any other criteria.

Q. What criteria are most important when selecting a travel vendor for last-mile solutions?
Please drag and drop each item so 1 equals the most important and 5 equals the least important (n=46).



LICENSED DRIVERS, VEHICLE INSPECTIONS, REAL-TIME DATA, AND BRAND REPUTATION ARE VIEWED AS IMPORTANT LAST MILE SAFETY FEATURES BY TRAVEL MANAGERS

Please Rate the Following Safety Features When It Comes to Ground Transportation/Last Mile Travel



Safety is viewed as important by business travellers and travel managers. Both groups consider safety when making decisions about ground transport. There are many factors they can consider.

Travel managers say various factors are important. These include regular inspections/safety checks for vehicles (93%), working with well-known/ established brands (93%), and drivers with professional licenses/ qualifications (91%).

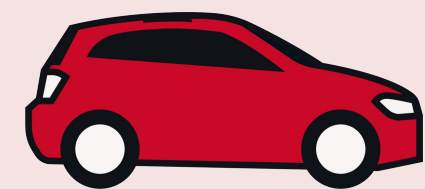
Q. Please rate the following safety features when it comes to ground transportation/last mile travel



TAXIS ARE VIEWED AS A SAFE OPTION FOR GROUND TRANSPORT

Which Modes of Ground Transportation Are Viewed as Safest?

% included in top 2 (out of 6 possible)



74%

Company cars



50%

Taxis (with or without ride-hailing app)



43%

Rental cars



26%

Public transportation

Taxis are viewed as one of the safest options for ground transport.

Travel managers were asked to rank the safety of different modes of ground transport. A large number (74%) indicate company cars are one of the two safest options. However, typically, companies do not actually have their own cars available in destinations where employees travel.

Taxis are viewed by travel managers as the safest third-party option.

They are viewed as safer than rental cars. This could reflect the perceived danger of employees driving in cities where they do not fully understand traffic laws or driving norms.

Taxis are also viewed as safer than public transportation.

Travel managers might be worried about the risk of crime—such as pickpockets—when employees take public transit. Taxis also have other features that support safety (see next page).

Q. Which mode of transport do you perceive as the safest for corporate travel?
Please drag and drop each option so #1 equals the one that you perceive as safest (n=42).

THE SAFETY OF TAXIS



Taxis are viewed as one of the safest options available: Half of travel managers indicate taxis are one of the two safest modes of ground transport for business travel. This is higher than the share who indicate rental cars (43%) or public transportation (26%). There are several possible reasons why.

- **Qualified drivers:** In many countries, taxi drivers have professional licenses or qualifications. This license can be denied or revoked if they have a poor driving record, or criminal history. In addition, they might need to pass a special test. An overwhelming majority of travel managers (91%) say drivers with professional licenses/qualifications are an important safety feature for ground transport.
- **Vehicle inspections:** Taxis might be subject to special inspections. For instance, taxi vehicles in the UK are sometimes required to undergo more frequent—or thorough— inspections than the standard MOT test required annually of every vehicle in the country. Virtually all travel managers say regular vehicle inspections/safety checks (93%) is an important safety feature for ground transport.

- **Safe vehicles:** Standard vehicles are used as taxis across specific markets. There is little variation in the type or model of vehicle used. Often, regulations dictate which types of vehicles can be used. For instance, some countries might have a “suitable vehicle list.” Almost two-thirds of travel managers (64%) say using only certain types of vehicles (e.g., newer makes or models) is an important safety feature for ground transport.

- **Data/tracking:** Today, taxis are commonly booked using technology. Detailed information is recorded. These include the driver’s name, vehicle type, and the route and duration of a trip. This data can be used locate employees in an emergency, respond to an incident, or analyse the company’s travel patterns to identify safety concerns. Three-quarters of travel managers (76%) say receiving real-time data/reporting is an important safety feature of taxis.

TAXI VS PHV CASE STUDY: A COMPARATIVE REVIEW IN SPAIN

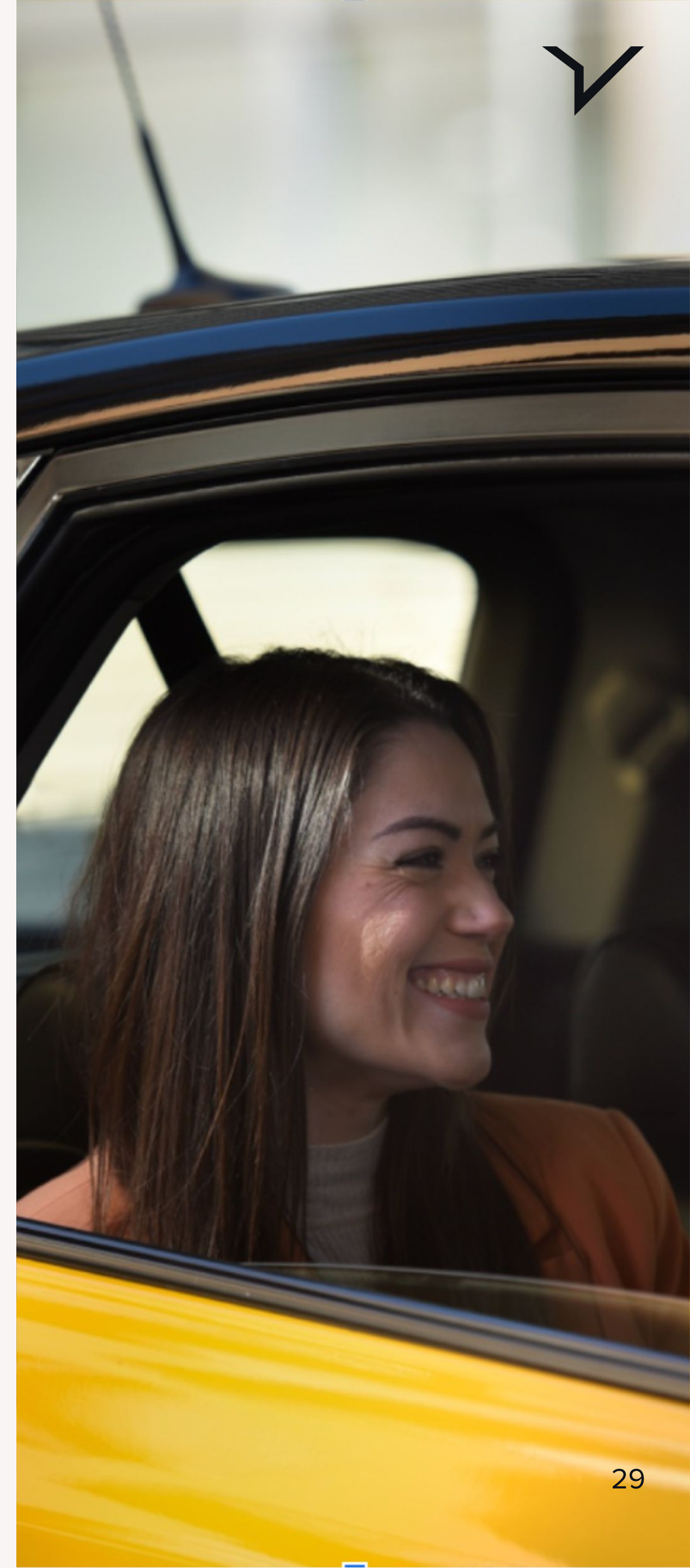
Safety and accident rates

■ Lower Accident Rates for Taxis:

- Studies show taxis have consistently lower accident rates compared to PHVs.
 - **RACE Foundation Study (2022):** Taxi accident rates were 20% lower than PHVs in 2019-2020 in Madrid.
 - **DGT Report (2021):** Taxi accident rates were 35% lower than PHVs in Madrid, Barcelona, and Valencia.
 - **Madrid City Council (2022):** Taxi accidents with victims were 28% lower than PHVs.

■ Frequent Vehicle Inspections:

- Taxis undergo vehicle inspections (ITV) annually to ensure safety, then every 6 months after five years.
- Taxis are required to maintain a vehicle maintenance log reviewed periodically by authorities.
- In most cities, taxis must be less than 10 years old.





TAXI VS PHV CASE STUDY: A COMPARATIVE REVIEW IN SPAIN

Driver experience and knowledge

Experienced Taxi Drivers:

- Taxi drivers generally have more years of professional driving experience than PHV drivers.
- Taxis are required to maintain a vehicle maintenance log reviewed periodically by authorities.
- In most cities, taxis must be less than 10 years old.

Knowledge of the City:

- Taxi drivers must pass a city knowledge exam, ensuring they know routes and areas, contributing to safer and more efficient trips.
- PHV drivers are not typically required to pass said exams, which can lead to less familiarity with city layouts and potentially less safe navigation.

Work Conditions for Taxi Drivers:

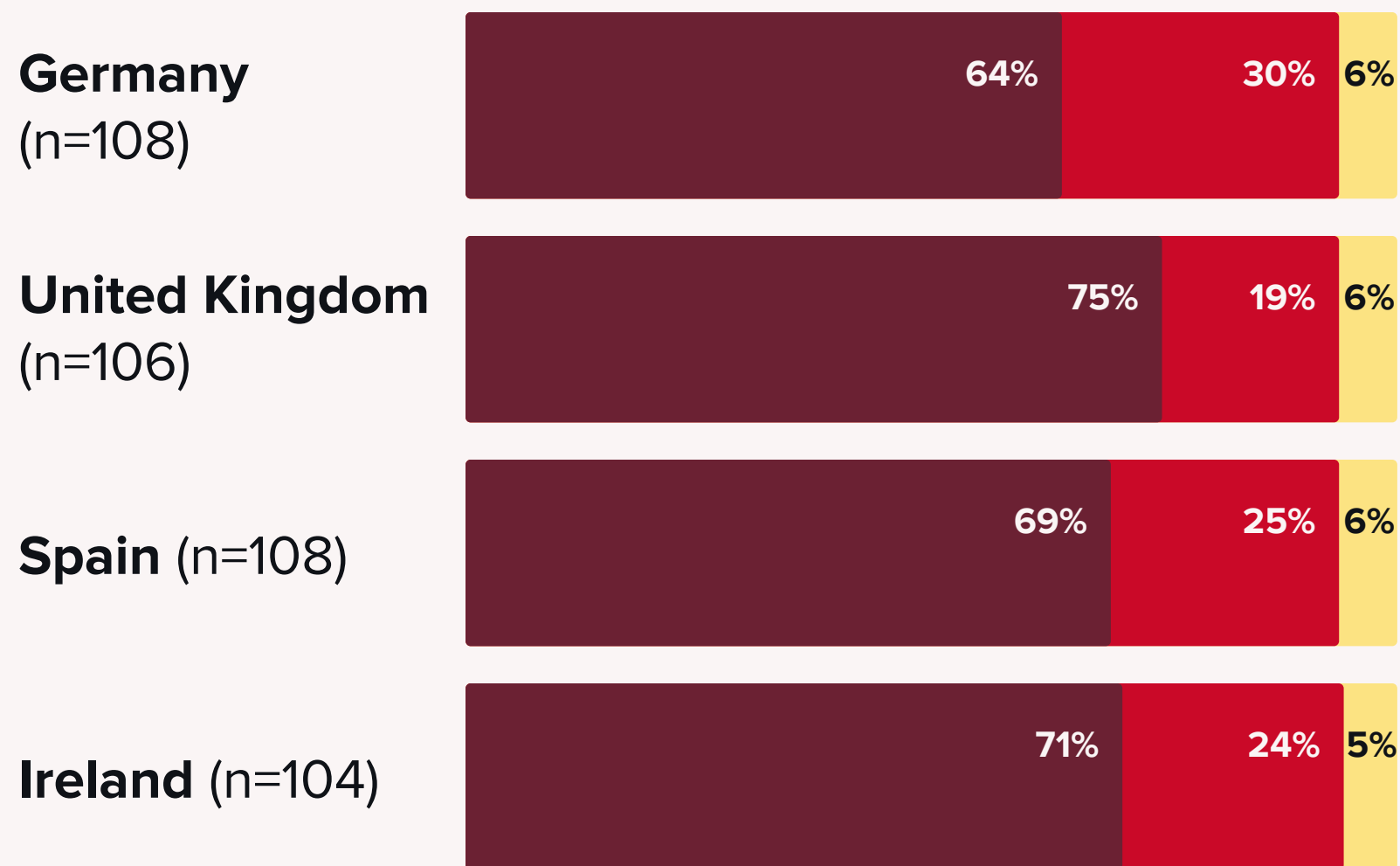
- Taxi drivers have regulated working hours, with limits on daily and weekly shifts, as well as mandatory rest periods.



RELATIONSHIPS WITH GROUND TRANSPORT VENDORS CAN INCREASE EFFICIENCY

Importance of Safety When Choosing...

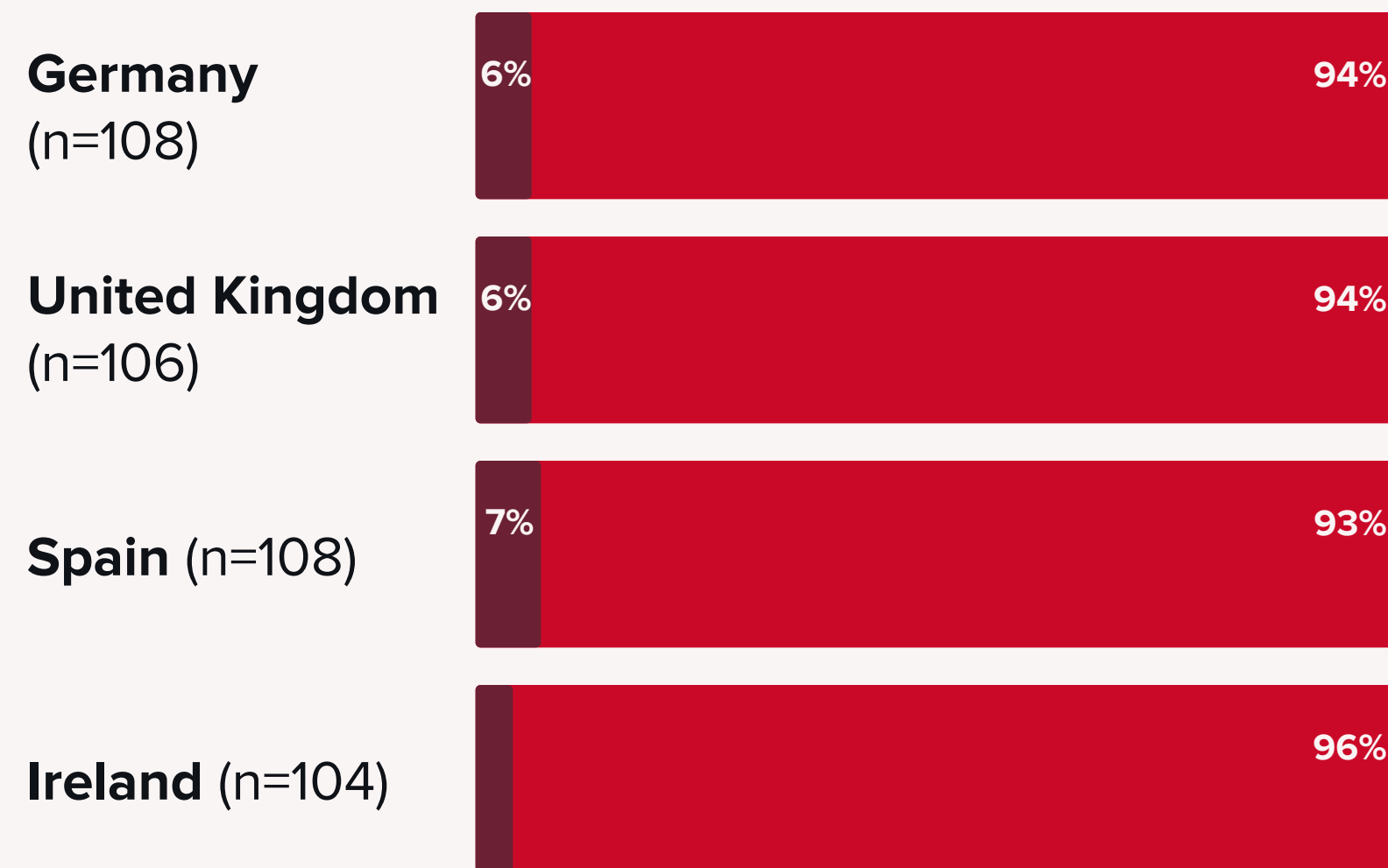
Does Company Have a Formal Relationship, Contract, or Business Account With a Ground Transport/Last Mile Vendor?



■ Yes ■ No ■ Not sure

Q. Thinking about your company, which of the following apply?
My company's travel policy specifies which modes of ground transportation/last-mile transportation employees can use on business travel (e.g., we can use taxis but not chauffeured transportation; we can use rental cars in some scenarios but not others)

Would Having a Formal Relationship, Contract, or Account With a Last-Mile Transportation Provider Increase Efficiency?



■ No ■ Yes

Q. Do you think having a formal relationship, contract, or business account with a last-mile transportation provider would increase efficiency?

Companies commonly have a formal relationship or business account with a ground transport vendor. This could be a taxi company/ technology platform, a rental car company, or a chauffeured car company among others. A “preferred” relationship allows companies to receive reporting and dedicated account support, apply travel policies, and streamline processes such as payment and expense reporting. In addition, companies can choose to work with vendors have a demonstrated **safety record** — and mandate or encourage employees to book with these vendors.

While this can limit traveller choice, it can improve safety. It might also improve efficiency. For instance, rides might automatically import to an expense tool – saving employees time on expense reporting. In each of the four countries surveyed, more than nine in 10 business travellers agree that such “preferred” relationships increases efficiency.



FREENOW'S COMMITMENT TO SAFETY

Safety Management Approach:

- FREENOW is dedicated to making its platform safer for everyone through a proactive safety management approach.
- A globally aligned safety procedure is in place, supported by a dedicated safety response team.
- The team works closely with law enforcement and licensing authorities to address safety issues.

Compliance and Documentation:

- Regular compliance reviews ensure that all required documentation for drivers, vehicles, and companies is collected as per local regulations.
- Any missing, expired, or rejected documents result in the driver's or company's account being blocked until updated.

Collaboration with Authorities:

- FREENOW tracks all trips, allowing for a swift response in emergencies.
- The company cooperates with authorities by sharing relevant trip data upon formal request for investigations.

Data safety

- FREENOW is ISO 27001 certified which means your data is safe with us.

FREENOW'S COMMITMENT TO SAFETY

(Cont.)

Ride-Hailing Safety Features:

- **Driver Profile:** Riders can view driver profiles, including ratings, photos, and vehicle details before starting a trip.
- **Live Location Sharing:** Riders can share their live trip location with friends and family using external messaging apps, offering peace of mind.
- **Hidden Phone Numbers:** Riders and drivers communicate through the app without revealing their personal phone numbers.
- **In-App Support:** Riders can report safety issues directly within the app, allowing the support team to respond quickly.
- **Rating System:** Both riders and drivers can rate each other, helping maintain high service standards.
 - Ratings are reviewed daily, with manual checks and automatic alerts for ratings below 4.7/5.



How FREENOW uses technology to ensure your employees are safe.



One of the reasons for choosing FREENOW (over their competition) is safety. Safety is a crucial aspect of our last mile solution. We want to make sure that our employees are safe while travelling for work. And this has been the case over the last 6 years that we are using FREENOW for Business. The relationship with the drivers and the drivers themselves make all the difference and we know that our employees are in good hands."



— Julien Thomas,
Managing Director/Associate at Ginini



“At FREENOW, safety is our top priority. We strive to ensure that every trip is as safe as possible, whether it's a taxi journey or using one of our multi-mobility options. Our commitment to safety is built on a foundation of proactive management, strict compliance with local regulations, and continuous collaboration with authorities. By integrating safety features into our app and ensuring transparency, we provide peace of mind for both riders, drivers, and your company.”

— **Felix Brand**, Chief Strategy Officer
at FREENOW

METHODOLOGY

METHODOLOGY

Two online surveys

Travel manager survey (Germany, UK, Spain, and Ireland)

- Data collection from 10 September through 4 October 2024
- An email invitation was sent to 1,299 business travel managers in Germany, the United Kingdom, Spain and Ireland
- In total, 100 completed at least one question, for a response rate of 7.7%
 - Of those who responded, 76 qualified because they are at least “a little involved” when it comes to managing or overseeing ground transportation policies, processes, or vendors at their company

Business traveller survey (Germany, UK, Spain and Ireland)

- Data collection from 5 September through 24 September 2024
- Sample from online panel provided by the company Qualtrics
- Respondents qualified if: (1) they are at least 18 years old; (2) they are employed full-time or part time; (3) they have travelled at least once for work in the past year; (4) their company uses a corporate Travel Management Company (TMC) or a corporate Online Booking Engine (OBE)
- In total, 425 business travellers completed the survey in Germany (108), the United Kingdom (106), Spain (108), and Ireland (103)

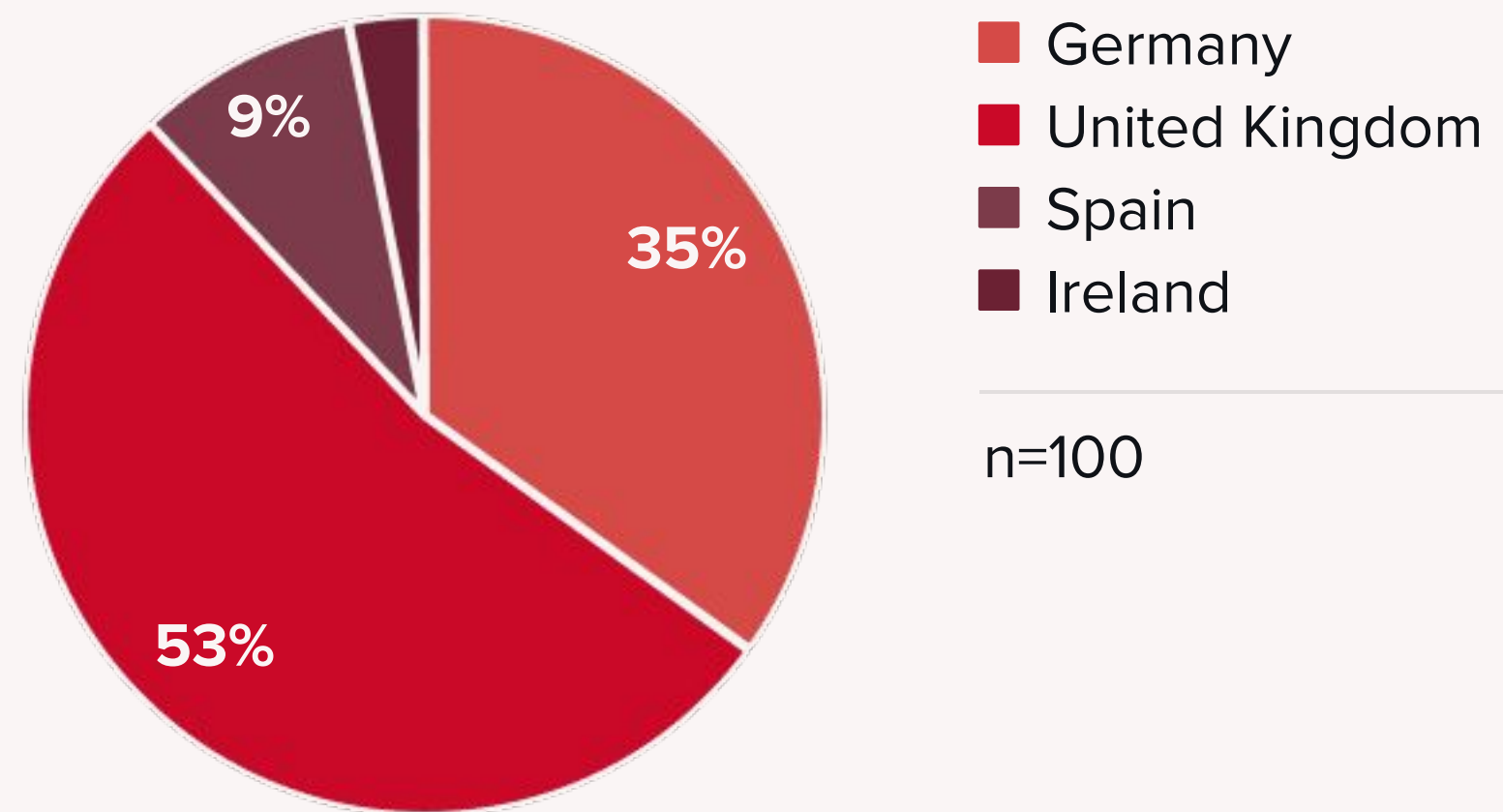


RESPONDENT PROFILE

TRAVEL BUYER PROFILE



Country



Involvement when it comes to managing or overseeing ground transportation policies, processes, or vendors at your company

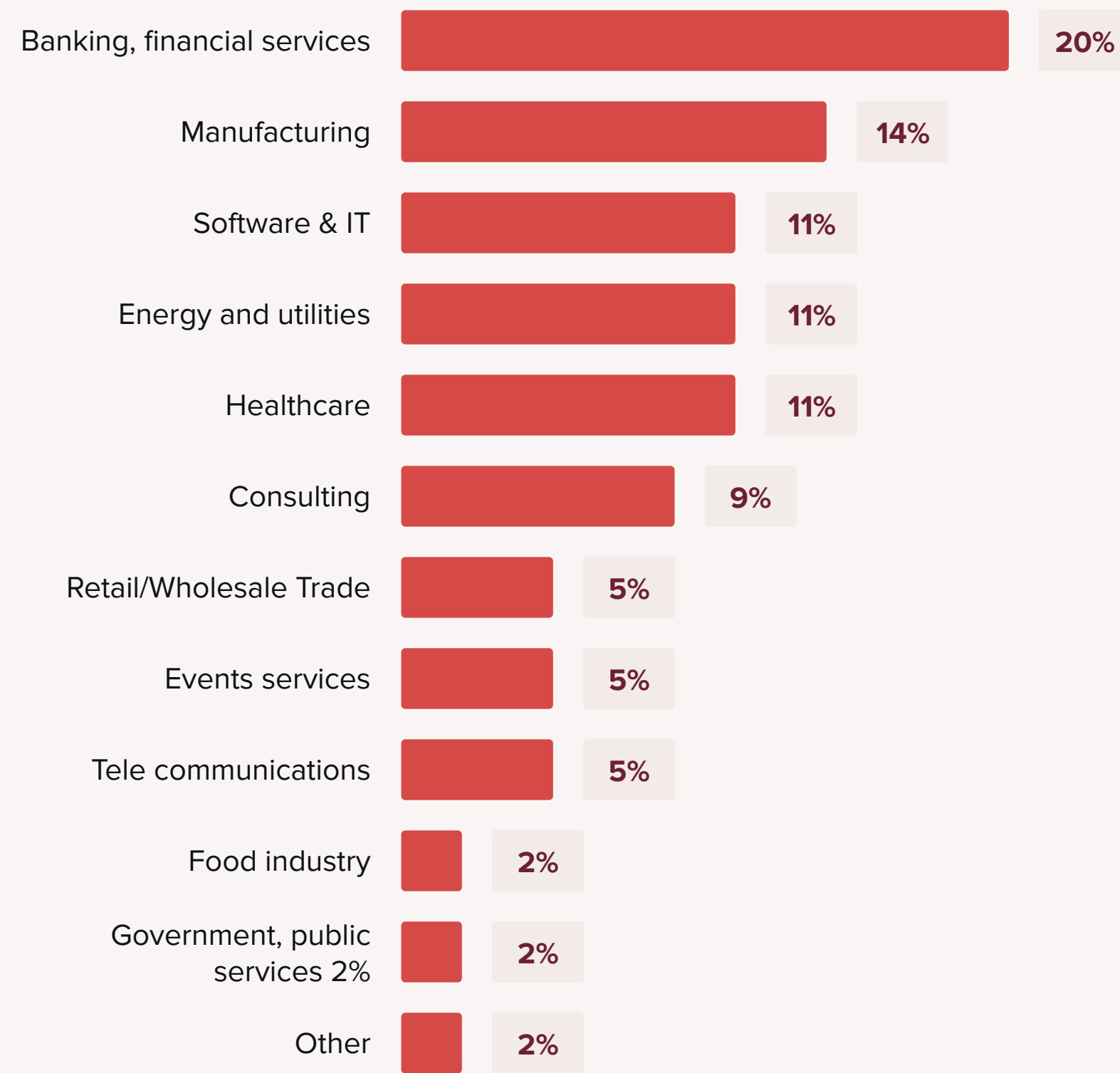


■ A little involved ■ Somewhat involved ■ Very involved

n=76

TRAVEL BUYER PROFILE

Which of the following industries best describes your organisation?



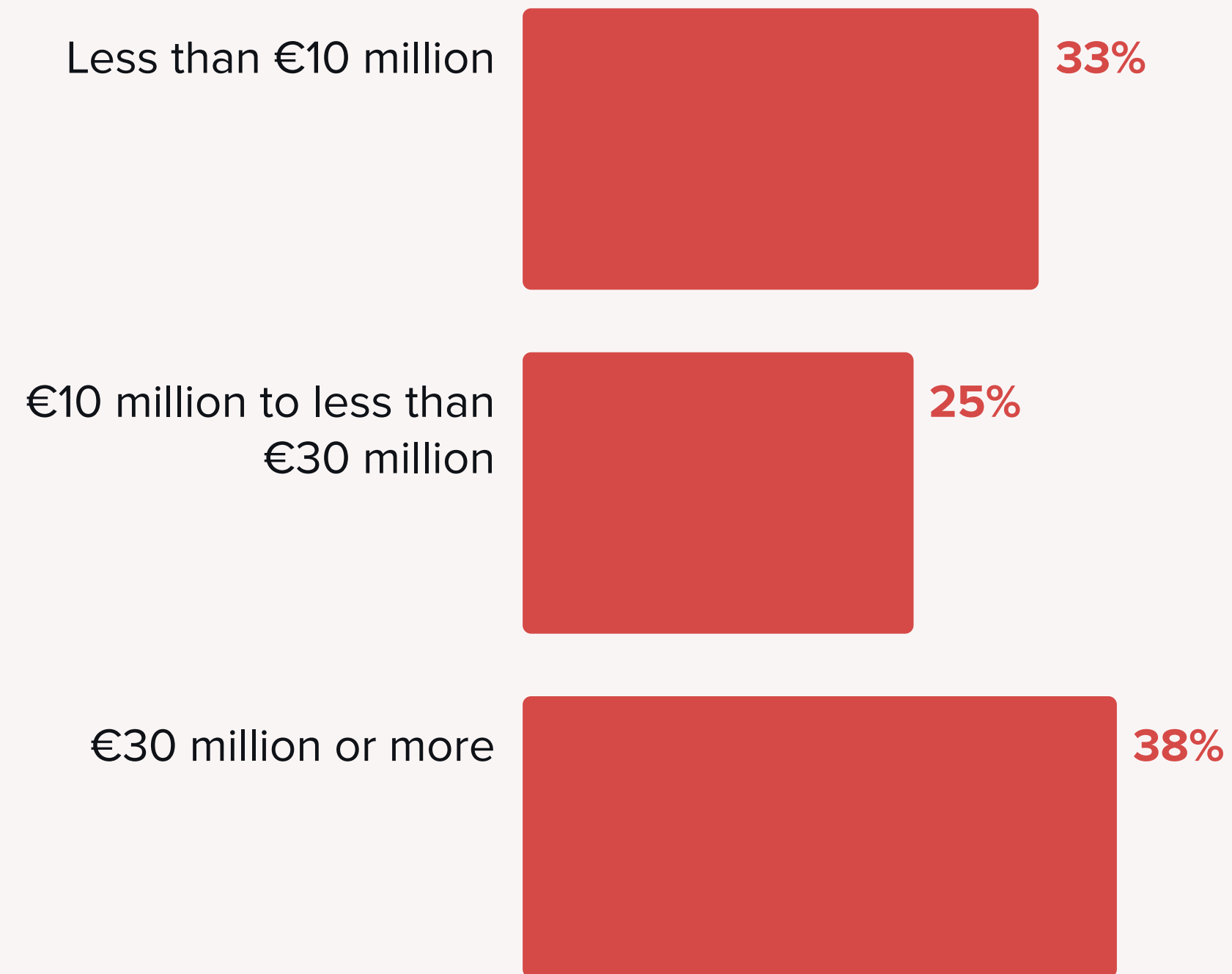
n=44



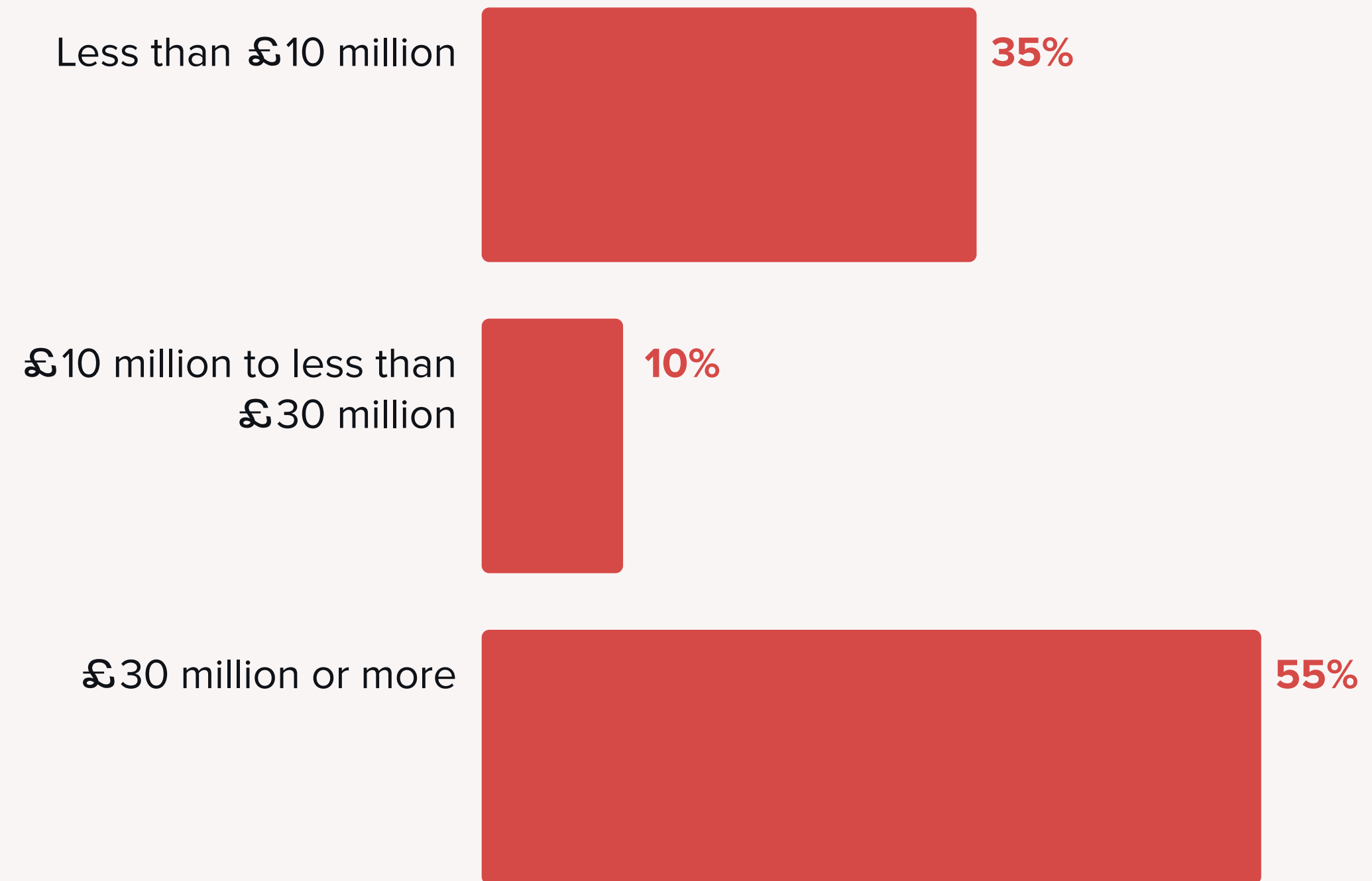


TRAVEL BUYER PROFILE

Travel spend in Euros



Travel spend in Pounds



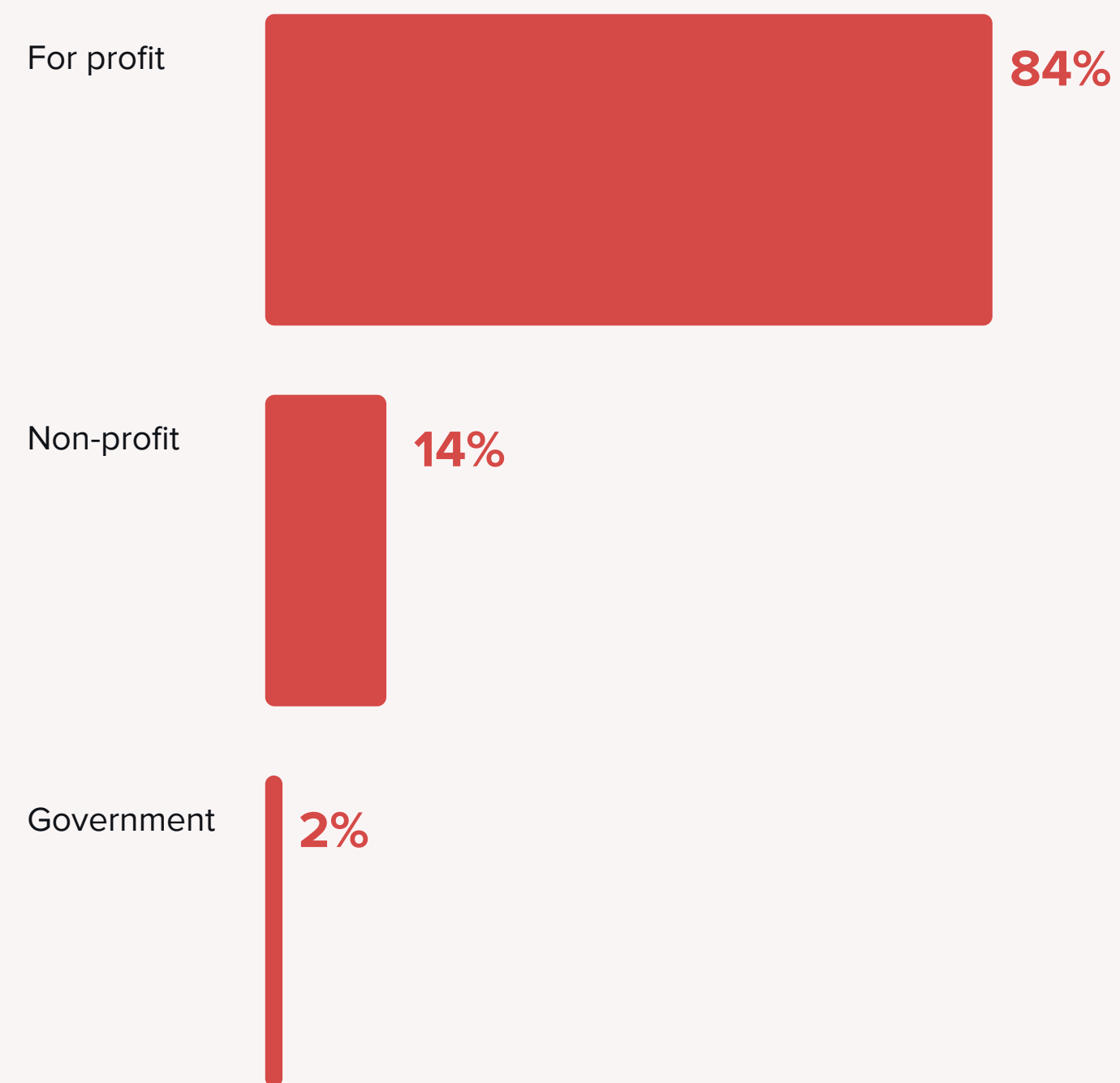
Q: [DISPLAY IF Q1=GERMANY, IRELAND, OR SPAIN] What was your company's total travel spend in 2023 in euros (including air, hotel, car rentals, meetings, etc.)? Please use your best estimate. (n=24)

Q: [DISPLAY IF Q1=UK] What was your company's total travel spend in 2023 in GBP (including air, hotel, car rentals, meetings, etc.)? Please use your best estimate. (n=20)



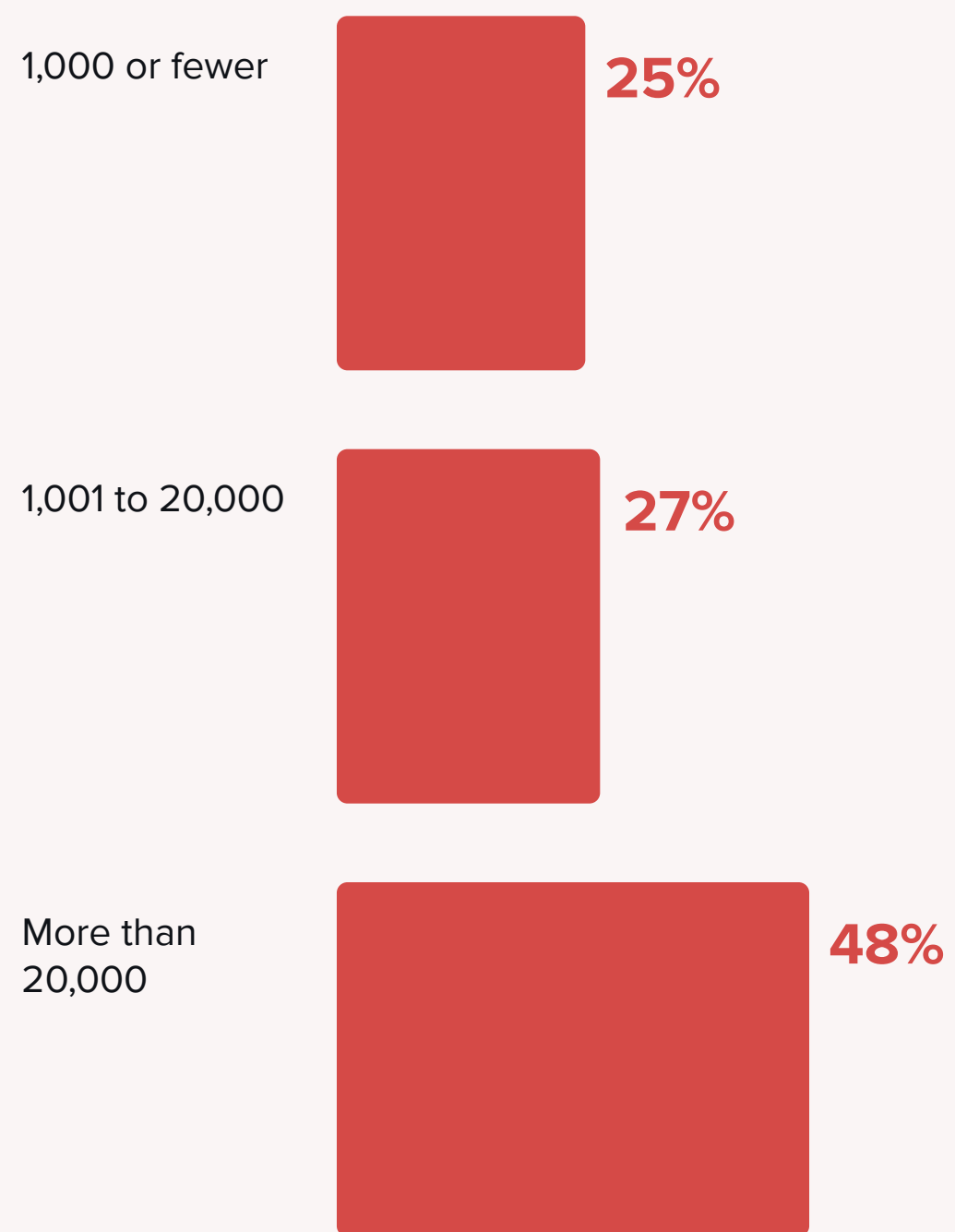
TRAVEL BUYER PROFILE

Company Profile



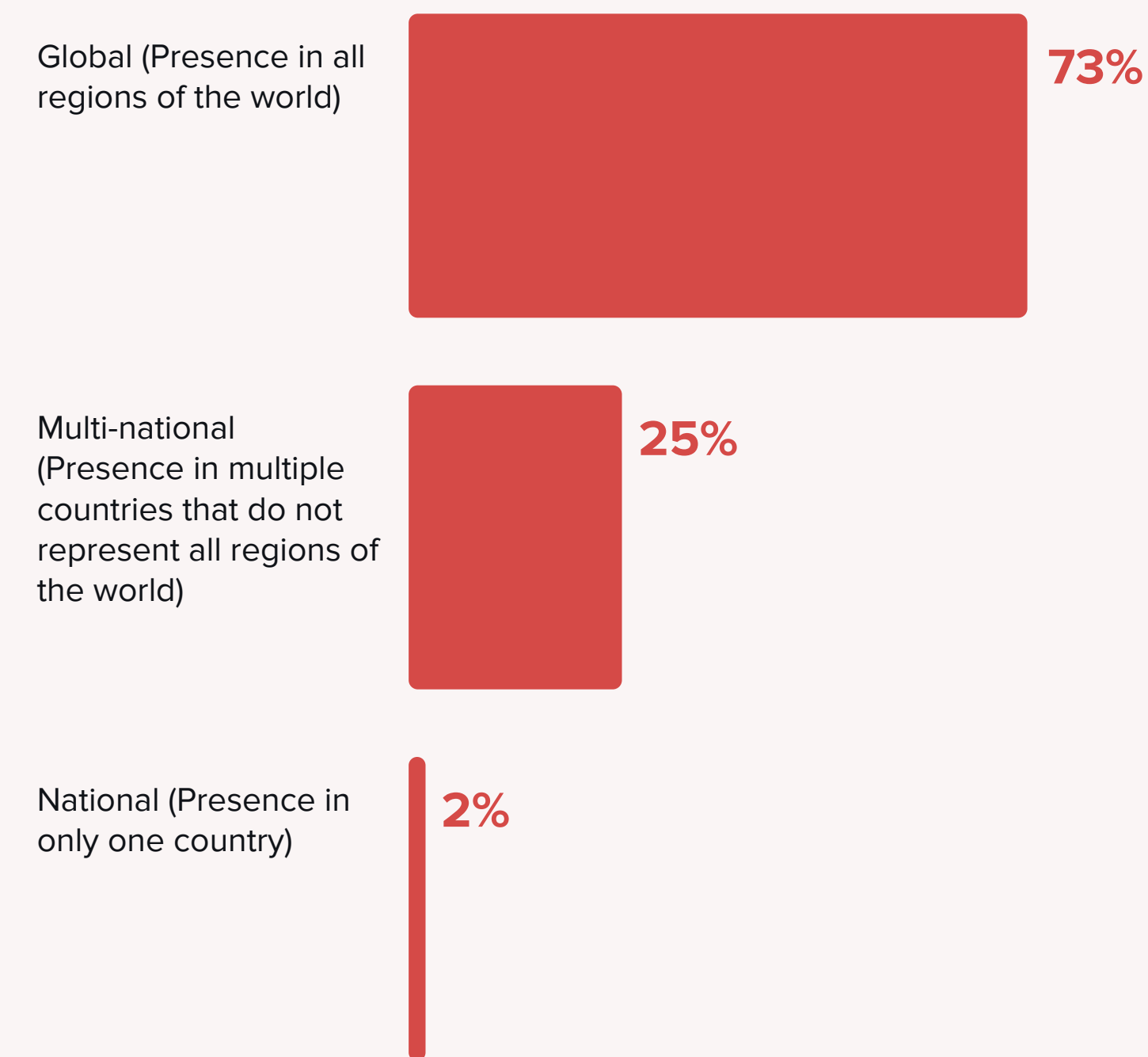
Q: [Which of the following best describes your organisation? (n=44)]

Number of Employees



Q: How many employees does the organisation you work for have across all locations? Your best estimate is fine. (n=44)





Company Reach



Q: How would you define your company's reach? (n=44)

BUSINESS TRAVELLER PROFILE







Business Traveller Profile				
				
Gender				
Female	31%	41%	35%	36%
Male	69%	59%	65%	63%
Other/diverse	0%	0%	0%	1%
Age				
18 to 34	68%	64%	41%	59%
35 to 54	29%	35%	49%	37%
55+	4%	1%	11%	4%
Employment Status				
Employed full-time	91%	88%	84%	89%
Employed part-time	9%	12%	16%	11%

BUSINESS TRAVELLER PROFILE

(Cont.)







Business Traveller Profile (Cont.)				
				
Does Company Use a Travel Management Company (TMC)?				
Yes	94%	88%	83%	82%
No	5%	6%	9%	10%
Not sure	2%	6%	7%	9%
Does Company Use an Online Booking Engine (OBE)?				
Yes	89%	83%	83%	87%
No	8%	12%	14%	13%
Not sure	3%	5%	3%	0%
Company's Travel Policies				
I must follow my company's stated policies	64%	56%	55%	49%
I am encouraged to follow general guidelines	29%	34%	38%	47%
I have no restrictions or company guidelines to follow	6%	10%	7%	4%



BUSINESS TRAVELLER PROFILE





(Cont.)

Business Traveller Profile (Cont.)				
				
Number of Business Trips in Past Year				
1 to 2 trips	55%	43%	43%	32%
3 to 5 trips	31%	38%	30%	47%
6 or more trips	15%	20%	27%	21%
Position				
Administrative/ Support Staff	13%	20%	17%	22%
Middle Management	69%	46%	56%	45%
Upper Management	11%	24%	25%	23%
C-level	7%	10%	2%	10%



BUSINESS TRAVELLER PROFILE

(Cont.)

Business Traveller Profile (Cont.)				
				
Number of Employees at Company				
500 or fewer	41%	51%	52%	49%
501 to 1,000	21%	22%	15%	15%
More than 1,000	37%	26%	32%	36%
Not sure	0%	1%	1%	1%
Travel Destinations in Past 2 Years				
Domestic destinations only	41%	22%	39%	15%
International destinations only	30%	21%	14%	40%
Both domestic and international destinations	30%	58%	47%	46%



About FREENOW

FREENOW is Europe's multi-mobility app with taxi offering at its core, available in 9 European markets and over 150 cities. Its users can access various mobility services within a single app, including taxis, PHV, carsharing, car rental, eScooters, eBikes, eMopeds and public transport. FREENOW partners with numerous mobility brands and aggregates their offering with the ambition to make urban mobility more efficient and sustainable without adding new vehicles on the street. FREENOW is backed by its shareholders: BMW Group and Mercedes-Benz Mobility. FREENOW's HQ is located in Hamburg and the company is led by CEO Thomas Zimmermann.

About the Global Business Travel Association

The Global Business Travel Association (GBTA) is the world's premier business travel and meetings trade organization headquartered in the Washington, D.C. area serving stakeholders across six continents. GBTA and its 7,600+ members represent and advocate for the \$1.48 trillion global business travel and meetings industry. GBTA and the GBTA Foundation deliver 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. For more information, visit [GBTA.org](https://www.gbta.org) and [GBTAFoundation.org](https://www.gbtafoundation.org).

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