

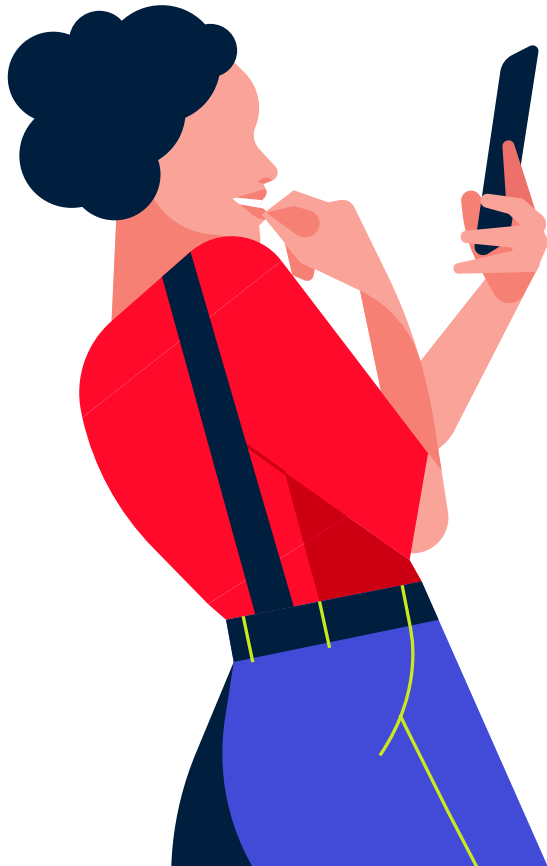
# Ground Transportation in Europe:

## Adapting Travel Policies in a Changing Landscape



OCTOBER 2020

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# Introduction



From airline pricing to personalised booking, rapid innovation has transformed business travel. However, no industry sector has seen more significant change in recent years than ground transportation. Ride-hailing apps have made considerable inroads in managed corporate travel. Rental car companies have consolidated, and micro-mobility services – such as electric scooters and bicycles-for-rent – have continued to gain traction. Even before the Coronavirus pandemic, the ground transportation sector had undergone major transformation worldwide.

The Coronavirus has brought even more notable change. Ground transportation companies have introduced new safety measures—such as mask requirements, enhanced cleaning, and in-vehicle partition screens. Furthermore, customer behaviour and expectations have changed as well. In all likelihood, some changes will endure for years after the pandemic.

This study examines ground transportation on business trips in Europe – focusing on seven key markets:



The study is based on two separate surveys – one of business travellers and one of corporate Travel Managers—and fifteen qualitative, in-depth interviews with Travel Managers. It addresses several key questions including:

1

### Travel policies

How do corporate travel policies address ground transportation on work trips? Have policies changed as a result of the Coronavirus?

2

### Travel preferences

Which modes of ground transportation do business travellers prefer to take on work trips? Have preferences changed as a result of the pandemic?

3

### Coronavirus response

How have travel programmes responded to the pandemic? Have Travel Managers had conversations with preferred ground transportation providers about sanitation practices? Are business travellers interested in allowing their company to track data about their ground transportation rides to aid contact tracing?

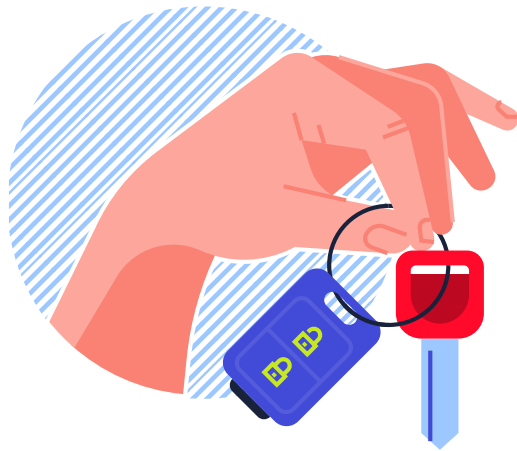
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### Ride-hailing apps

What do business travellers and Travel Managers view as the most important features of ride-hailing mobile apps? How often do travel programmes in Europe have a formal relationship, contract, or company account with a ride-hailing technology company?



# Key Findings



## Ride-hailing among business travellers in Europe is growing in popularity.

A majority of business travellers in the seven countries (ranging from 51% – 76%) surveyed say they are "interested" or "very interested" in using private hire vehicles (PHV) or independent drivers ordered through a mobile app. This sentiment is consistent even in the current Covid-19 environment, as business travellers remain interested in using PHVs and independent drivers for ground transportation. A majority of European business travellers (ranging from 58% - 87%) note they use a ride-hailing mobile app "always" or "often" during business travel. Given the widespread use and interest in PHVs and independent drivers, travel programmes should ensure this ground option is permitted, in order to help promote traveller satisfaction.

## A growing number of travel programmes have a formal relationship, contract or company account with a ride-hailing technology company.

Given the popularity and use of ride-hailing among business travellers, as well as the perceived benefits in terms of increased data visibility and expense reporting, it's not surprising more travel programmes have a formal relationship or contract. In fact, one-third of Travel Managers surveyed expect their programme will begin a formal relationship with a ride-hailing company within the next year. There is a strong opportunity for ride-hailing technology companies to expand market share and customer base by entering formal relationships with travel programmes who currently do not have one.

## Sustainability is a key priority for many European travel programmes and business travellers, but it presents challenges for travel programmes.

In fact, sustainability is a key factor many business travellers consider when choosing ground transportation when travelling for business, and many European companies also have corporate goals surrounding sustainability (including reducing their carbon footprint). Ride-hailing companies will benefit by promoting sustainability features – especially when including electric cars in their service. In addition, ride-hailing companies who show a commitment to sustainable practices and provide more information on sustainability, will likely find a receptive audience among Travel Managers and travellers alike.

## The Coronavirus is changing traveller choices and ground transportation policies to emphasize safety and sanitation.

More Travel Managers report that their company has revised policies concerning ground transportation due to the pandemic but encouraged or allowed certain modes of transportation over others. There is also evidence suggesting a need for increased data on traveller safety and location. Additionally, most business travellers are interested in using preferred ground transportation providers that maintain high safety and sanitation standards, and allow their company to track ride data in order to help with contact tracing. Ground transportation providers who offer the information Travel Managers and travellers need concerning safety, sanitation, and hygiene, will have an advantage over companies and transportation modes that cannot.

## Few corporate travel programmes address micro-mobility services in their travel policies, although there is interest among business travellers for this option.

Bicycles and electric scooters for rent are a relatively new trend in the ground transportation category, but are largely absent from travel policies. Liability concerns, practicality and a perceived lack of traveller interest typically explain why Travel Managers do not include micro-mobility in their travel programme. However, a sizeable number of business travellers are interested in this option. Travel Managers should explore this option, especially considering the pandemic, as travellers may be hesitant to take public transportation or ride in cars due to health concerns.



# Europe Perspective Amongst Travellers and Travel Managers in the Seven Markets



1

# Current state of ground transportation policies

## Do corporate travel policies address...?

### The Travel Manager's Perspective

#### Traditional taxis/black cabs:

hailed manually or ordered through a mobile app

96%

#### Rental cars

96%

#### Long distance passenger rail/trains

95%

#### Public transit: buses or metrorail

90%

#### Private hire vehicles/independent drivers

ordered through a mobile app

89%

#### Limos/chauffeured transportation

85%

#### Car share: rental cars by the hour

56%

#### Bicycles for-rent

46%

#### Electric scooters for-rent

45%

Q. Prior to the COVID-19 pandemic, how did your company's travel policy address the following modes of ground transportation on business trips? (n=123-125)  
 Note: This graph only shows how often travel policies address the specified mode of transportation; policies that address a mode could allow it or prohibit it.



## In Europe, corporate travel policies address some modes of ground transportation – but not others.

Prior to the pandemic, travel policies commonly covered traditional taxis/black cabs (96%), rental cars (96%), long distance passenger rail/trains (95%), and public transit (90%). However, fewer policies addressed "micro-mobility" services such as rentable bicycles (46%) or electric scooters (45%). There are several possible reasons why:

### 01. Recent trend.

Electric scooters have only recently exploded in popularity around the world. Many companies update their travel policy on a fixed schedule—such as every three years— and not an ongoing basis. These companies have not had a chance to include micro-mobility in their policies.

### 02. Traveller interest.

In interviews, some Travel Managers predicted their employees would not want to use bicycles or scooters on work trips. However, the business traveller survey – conducted by GBTA and FREE NOW for Business for this study – contradicts this view. While most European travellers are generally not interested, a significant percentage (ranging from 31% – 57% depending on the market) are interested in using bicycles or electric scooters on business trips.

### 03. Liability concerns.

Micro-mobility can bring liability concerns. In most cases, business travellers do not have insurance when they take a bicycle or scooter. Additionally, they may not have important safety equipment – such as a helmet or headlights.

## Will the Coronavirus push micro-mobility forward?

### Some business travellers are interested:

Micro-mobility has quickly gained traction in Europe and around the world. While bicycles for-rent have been widely available in major cities for more than a decade—and are often provided by local governments to promote sustainability or reduce traffic—the number of electric scooters for-rent has exploded in the past three years. In Europe, some business travellers are interested in using bicycles or scooters on work trips (ranging from 31% to 57% depending on the market). However, fewer than half of corporate travel policies in these countries even address micro-mobility. This can create confusion when travellers want to use these services.

## Will the Coronavirus drive greater interest?

Bicycles and electric scooters can potentially reduce the risk of exposure to the Coronavirus. In most cases, the traveller rides alone and does not interact with a driver or other passengers. About half of business travellers are interested in using micromobility services if they were to take a work trip in the current COVID-19 environment.

# 31%-57%



European Travellers are interested in using bicycles for rent or electric scooters for rent on business trips

## A worldwide trend with regional differences

### Ride-hailing looks different around the world:

Ride-hailing mobile apps emerged only a decade ago and quickly transformed ground transportation on work trips. However, the impact was different across the world. In the U.S., these apps not only changed how business travellers order rides; they also changed the types of rides they order. American travellers primarily use apps—such as Uber and Lyft— to order rides with independent drivers. In Europe, travellers commonly use apps—such as FREE NOW (formerly mytaxi), Addison Lee, or Gett— to order fully licenced, traditional taxis. Increasingly, however, some of these apps also give European travellers the option to order private hire vehicles (PHVs) or independent drivers—similar to the types of rides that Americans commonly take. Almost seven in 10 corporate travel policies “always” or “often” allow these rides (see graph on next page).



## Travel policies allow different modes of ground transportation.

As shown earlier, travel policies address a variety of ground transportation options. However, this does not necessarily mean they allow them. Many policies mention when specific modes of transportation—such as limos or electric scooters—are not allowed. Several key points stand out when analysing the modes of ground transportation that policies allow.

### 01. In Europe, travel policies commonly allow rental cars.

Of those who indicated their policy addressed rental cars, a large majority of Travel Managers say it always (69%) or often (15%) allowed them prior to the pandemic.

### 02. PHVs gain acceptance in Europe.

Most travel policies always (49%) or often (20%) allow rides with private-hire vehicles (PHVs) or independent drivers. These typically have different licencing requirements compared to traditional taxis and use different types of vehicles. In most cases, travellers order these rides through a ride-hailing mobile app. These rides are typically cheaper than traditional taxis/black cabs.

### 03. Many travel policies restrict micro-mobility.

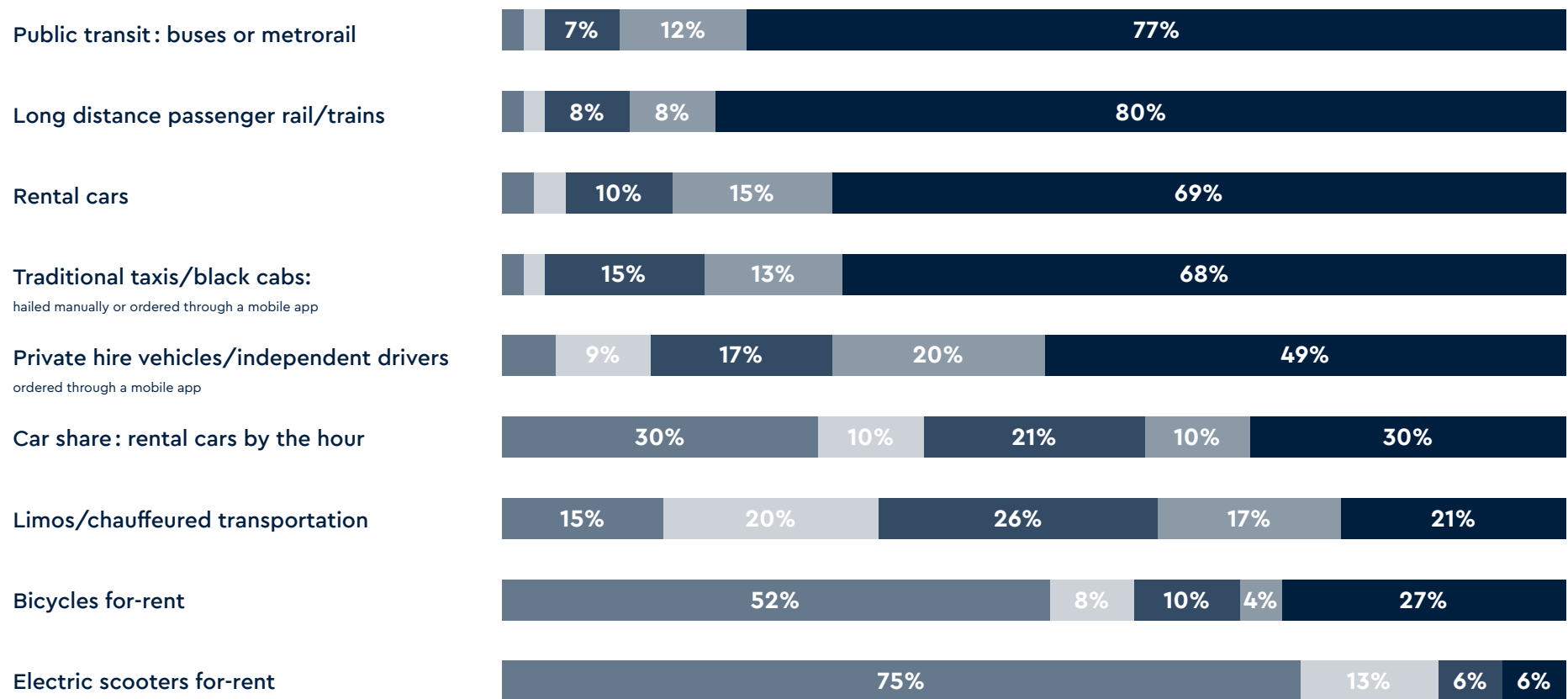
When policies address micro-mobility, they commonly restrict it. For instance, three-quarters of policies (75%) that address electric scooters never allow them.

Most travel policies, always **(49%)** or often **(20%)** allow rides with private-hire vehicles (PHVs)



## Do travel policies allow

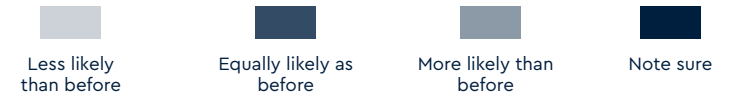
### The Travel Manager's Perspective



Q. Prior to the COVID-19 pandemic, how did your company's travel policy address the following modes of ground transportation on business trips? (n=52-120)

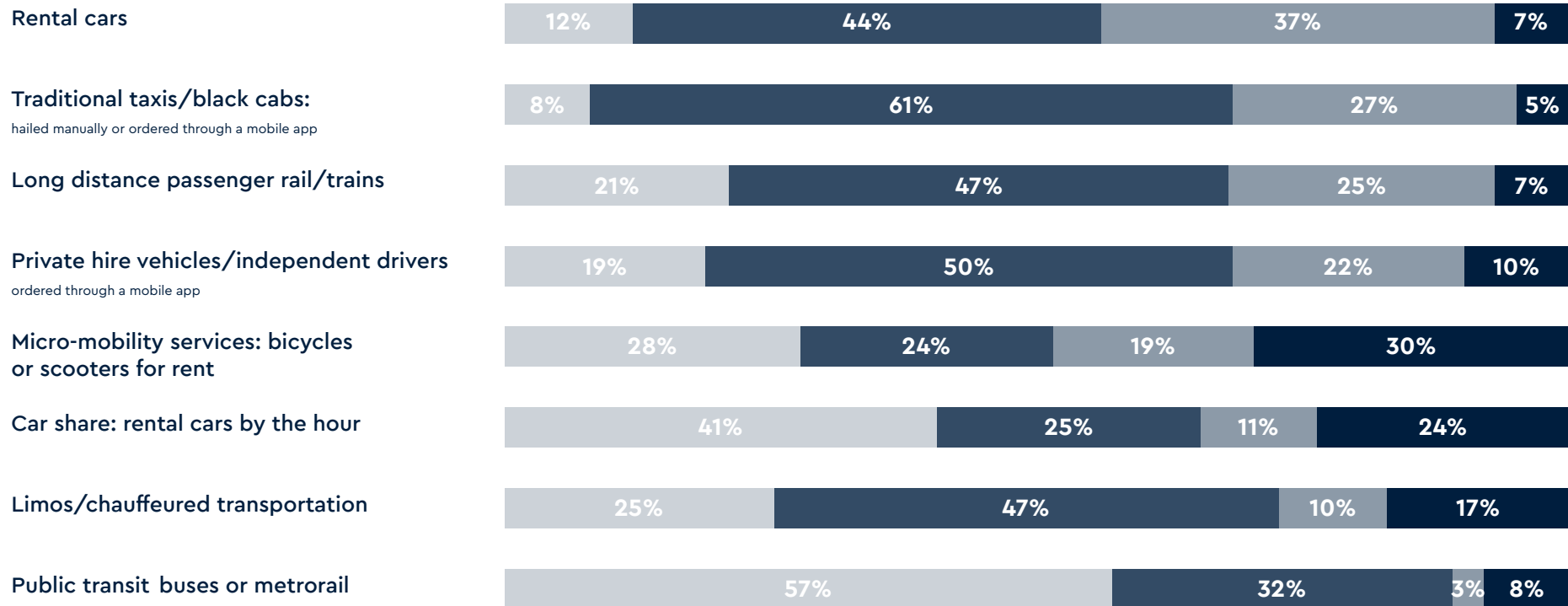
## The Coronavirus has made companies rethink policies on ground transportation.

Half of European Travel Managers (50%) say their company has changed its policies on ground transportation as a result of the Coronavirus pandemic. In addition, European Travel Managers say their company will be more likely to allow some modes of ground transportation and less likely to allow others (see below).



### As a result of the Coronavirus, are travel programmes more or less likely to allow

#### The Travel Manager's Perspective



Q. As a result of the COVID-19 pandemic, do you think your company will be more or less likely to allow or encourage...? (n=99-104)

## Will the Coronavirus drive travel policy changes?

About half of Travel Managers (50%) say their company has changed its policies toward ground transportation as a result of the COVID-19 pandemic. While some changes are expected, others might be more surprising.

### Some changes are expected:

Almost three in five Travel Managers (57%) say their company will be less likely to allow or encourage public transit as a result of the COVID-19 pandemic. In addition, more than one-third of travel programmes (37%) are more likely to allow or encourage rental cars.

### Other changes might be more surprising:

More than one-quarter of travel programmes (27%) are more likely to allow or encourage traditional taxis as a result of the pandemic. This is actually higher than the share that are less likely to allow them. In all likelihood, some programmes will encourage taxis in scenarios when they previously encouraged public transportation. Surprisingly, some programmes are less likely to allow car share (41%) and micromobility (28%) than they were before the pandemic. This is surprising because these modes of transportation promote social distancing—allowing employees to travel alone and avoid interacting with a driver.

# 50%



of Travel Managers say their company has changed its policies toward ground transportation as a result of the COVID-19 pandemic



## 2

## What ground transportation options do business travellers want to use?

**In a normal environment (without a pandemic), European business travellers are interested in using different modes of ground transportation on work trips.**

They are commonly interested in using long-distance rail, rental cars, traditional taxis or black cabs, and private hire vehicles or independent drivers. Several key points stand out when analysing traveller preferences:

**01. While business travellers care about sustainability, they also value convenience.**

A larger number are interested in using rental cars than public transit on business trips (see below). Green-minded companies will need design travel policies that balance sustainability with traveller preference.

**02. Business travellers are interested in using traditional taxis and PHVs.**

In Europe, many ride-hailing mobile apps allow travellers to order traditional, licenced taxis on-demand. However, some apps can be used to order rides with private-hire vehicles (PHVs) or independent drivers. These typically have different licencing requirements compare to traditional taxis traditional taxis and use different types of vehicles. In many cases, these rides are cheaper than traditional taxis. Business travellers are interested in using both modes of transportation on work trips.

**03. Business travellers are interested in micro-mobility:**

Roughly two in five business travellers in each country are interested in using electric scooters for-rent or bicycles for-rent on business trips. Yet company travel policies might not even address these services – causing confusion when these travellers want to use them.



## % interested + very interested in using on work trips in normal (non pandemic) times

### The Business Traveller's Perspective



	France	Germany	United Kingdom	Spain	Poland	Portugal	Ireland
Long-distance passenger rail/trains	80%	79%	79%	80%	80%	71%	66%
Rental cars	79%	77%	68%	82%	81%	73%	69%
Traditional taxis/black cabs: hailed manually or ordered through a mobile app	71%	72%	70%	77%	77%	68%	65%
Private-hire vehicles/independent drivers ordered through a mobile app	65%	51%	68%	76%	75%	75%	70%
Public transit: buses or Metrorail	60%	58%	68%	65%	67%	58%	57%
Car share: rental cars by-the-hour	56%	50%	56%	52%	64%	50%	52%
Limos/chauffered transportation	43%	52%	59%	44%	54%	34%	48%
Bicycles for-rent	46%	41%	48%	52%	57%	35%	53%
Electric scooters for-rent	39%	44%	46%	40%	44%	31%	53%

Q. In a normal environment (without a global pandemic), please rate your interest in using each of the following modes of ground transportation while travelling on business. (n=100-112)

## 3

## What ground transportation options do business travellers actually use?

Business travellers use different modes of ground transportation on work trips.

On their last work trip, business travellers in Europe commonly used long-distance rail, traditional taxis, rental cars, and public transit.<sup>1</sup>

### Which modes of ground transportation did business travellers use on their last work trip?

#### The Business Traveller's Perspective



	France	Germany	United Kingdom	Spain	Poland	Portugal	Ireland
Long-distance passenger rail/trains	47%	43%	36%	47%	48%	30%	35%
Traditional taxis/black cabs: hailed manually or ordered through a mobile app	26%	50%	27%	46%	43%	31%	39%
Rental cars	39%	34%	31%	48%	42%	45%	33%
Public transit: buses or Metrorail	25%	25%	37%	32%	40%	32%	18%
Private-hire vehicles/independent drivers ordered through a mobile app	20%	21%	24%	29%	30%	36%	38%
Car share: rental cars by-the-hour	16%	18%	24%	22%	27%	16%	18%
Bicycles for-rent	11%	16%	19%	16%	19%	8%	17%
Limos/chauffered transportation	10%	17%	14%	16%	16%	8%	16%
Electric scooters for-rent	9%	11%	17%	7%	13%	10%	17%

1. Note: These figures are filtered to only show respondents who took their last business trip before March 15, 2020 – around the time when companies worldwide suspended travel as a result of the Coronavirus pandemic.  
Q. On your last business trip, which of the following modes of ground transportation did you actually use? Please select all that apply.(n=100-109)



## Different countries, different behaviour?

Adoption of various modes of ground transportation is fairly similar across the seven countries surveyed. However, some interesting differences stand out.

### 01. Traditional taxis:

Half of Germany-based business travellers (50%) used a traditional taxi on their last work trip (see previous page). While this is similar to the share of Spain-based travellers (46%) who used one, it is significantly higher than the share of France (26%) and U.K.-based travellers (27%) who used one. In all likelihood, this reflects strict regulations in Germany that limit rides with independent drivers. As a result, travellers might use traditional taxis instead.

### 02. PHVs/independent drivers:

Business travellers who are based in Portugal, Ireland and Poland were most likely to take a ride with a PHV or independent driver on their last work trip. A decent number of travellers who are based in Spain and the U.K. used one, while travellers who are based in Germany and France were less likely to use one.

### 03. Public transit:

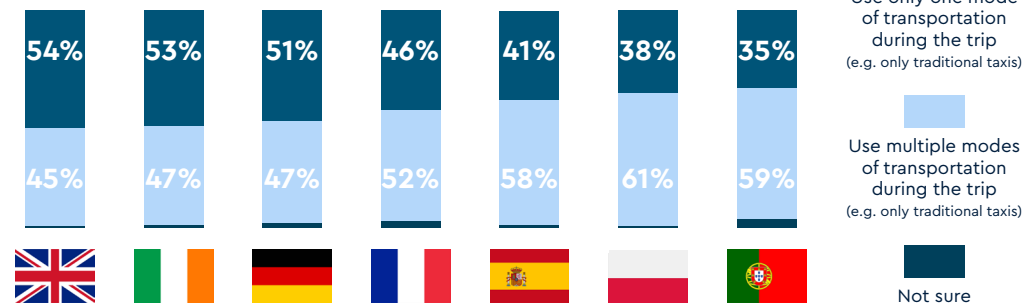
Business travellers who are based in the U.K. and Poland were most likely to use public transit on their last work trip. However, it is not clear why. These travellers may be more likely to travel to densely populated cities—such as London and Warsaw—where public transit is widely available.

## Many business travellers use multiple modes of ground transportation.

On their last work trip, roughly half of business travellers used multiple modes of ground transportation. For instance, they might take a taxi from the airport but use public transit to get around within the city. <sup>2</sup>

### On their last work trip, did business travellers...?

#### The Business Traveller's Perspective



<sup>2</sup> Note: These figures are filtered to only show respondents who took their last business trip before March 15, 2020 – around the time when companies worldwide suspended travel as a result of the Coronavirus pandemic.  
 Q. Thinking about your last business trip. Which best describes your situation? (n=68-69)

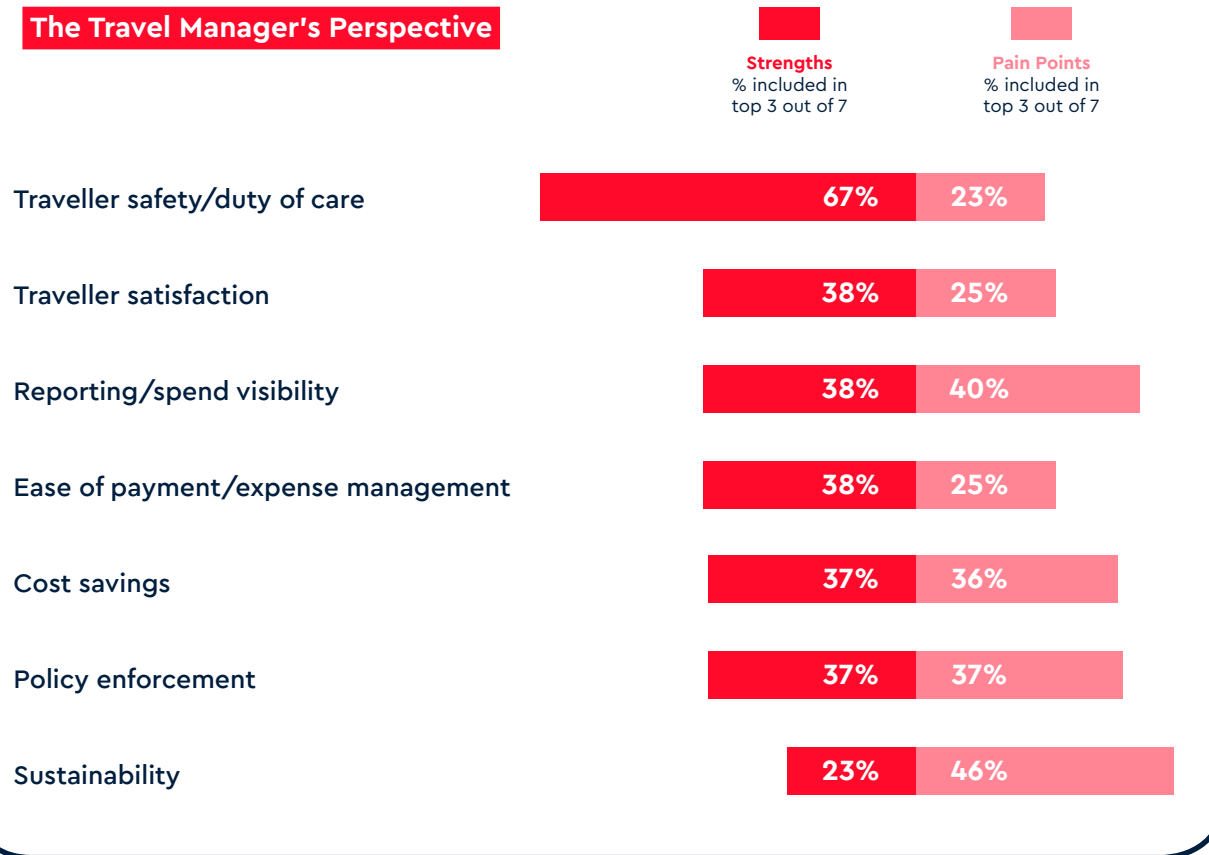
### The case for car-sharing?

More than one-third of business travellers in each of the seven countries used a rental car on their last work trip (see p. 15). Of these travellers, more than half still used more than one mode of ground transportation. For instance, they might use their rental car during the day but take a taxi to a pub after-hours. For some travellers, car-sharing might make sense as an alternative to traditional rental cars. Car-sharing allows travellers to rent cars by-the-hour. This can save money when travellers want to rent a car but would only use it at certain times during the day.

# 4 Ground transportation programmes: current challenges

What do Travel Managers view as their ground transportation programme's greatest...?

**The Travel Manager's Perspective**



Travel Managers identify several strengths of their managed ground transportation programme.

They most commonly include in the top three (out of seven possible) traveller safety/duty of care (67%), traveller satisfaction (38%), reporting/spend visibility (38%), and ease of payment/expense management (38%). They also identify a number of pain points. Most commonly included in the top three pain points (out of seven possible) are sustainability (47%), reporting/spend visibility (40%), and policy enforcement (37%).

Business travellers have diverse priorities when choosing ground transportation on work trips.

Most commonly included in the top three (out of eight possible) are: safety, convenience, and comfort.

Q. Thinking about your company's ground transportation programme in general, what are its three greatest strengths? Please select up to 3. (n=105)  
 Q. Thinking about your company's ground transportation programme in general, what are its three greatest pain points? Please select up to 3. (n=104)

## Will the Coronavirus make ground transportation less sustainable?

### Sustainability in the spotlight:

Despite recent efforts, sustainability remains a challenge for travel programmes. In Europe, a large number Travel Managers (46%) say sustainability is the one of the three greatest pain points with their ground transportation programme (see previous page). In addition, only about one-quarter of business travellers in Europe say sustainability is one their top three priorities when choosing ground transportation on work trips (see next page)

### Will the Coronavirus put sustainability on the backburner?

The Coronavirus has the potential to make ground transportation even less sustainable. As shown earlier (see p. 11), some travel programmes are less likely to allow or encourage public transit as a result of the pandemic. In addition, when renting a car or taking a taxi, employees from the same company might use separate vehicles to reduce risk of infection.

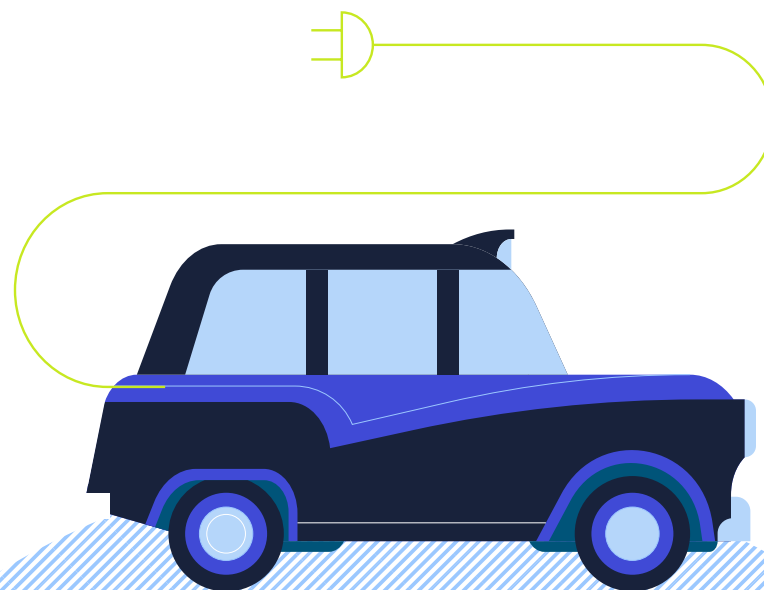
### Travel programmes can still take action:

These challenges make it important for travel programmes to find alternative ways to promote sustainability. Travel programmes can seek out ground transportation providers that offer hybrid or electric vehicles. They can encourage travellers to rent compact cars or use a ride-hailing app that allows users to request electric vehicles. They can also allow employees to use micromobility services such as bicycles or electric scooters.

# 46%



**of Travel Managers say sustainability is the one of the greatest pain points with their ground transportation programme**



## Top priorities when choosing ground transportation on business trips

### The Business Traveller's Perspective



	France	Germany	United Kingdom	Spain	Poland	Portugal	Italy
Safety	55%	60%	60%	70%	82%	71%	57%
Convenience	30%	40%	54%	21%	49%	29%	44%
Comfort	47%	38%	38%	58%	54%	56%	47%
Ease of booking	46%	28%	34%	32%	31%	41%	22%
Sustainability	32%	28%	25%	28%	26%	18%	27%
Ease of payment/expense reporting	28%	39%	21%	22%	18%	23%	35%
Cost savings for my company	23%	28%	25%	29%	11%	32%	27%
Policy compliance (i.e. making sure I follow my company's policies and rules)	20%	25%	27%	24%	20%	23%	30%

Q. When choosing ground transportation on business trips, how important are the following priorities? (n=98-112)

## 5

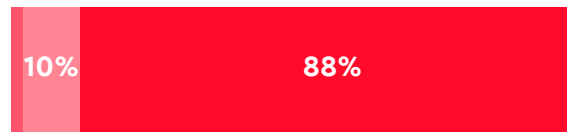
## How will COVID-19 change ground transportation programmes?

In the COVID-19 environment, are Travel Managers Interested in...?

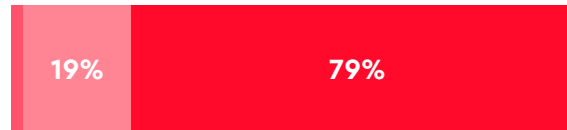
### The Travel Manager's Perspective

Not interested/Not interested at all      Neither interested nor uninterested      Interested/Very interested

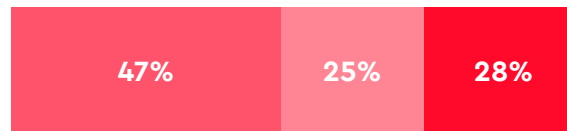
Using "preferred" ground transportation providers that we have vetted to ensure they meet safety/sanitation standards



Tracking data about ground transportation rides—such as destinations or driver names—to aid in contact tracing (i.e. to help notify me or others about possible exposure to COVID-19)



Allowing travellers to use "micro-mobility" services—such as bicycles or electric scooters for-rent—on short trips to avoid contact with other people



Ground transportation companies have responded forcefully to the Coronavirus pandemic. They have introduced new safety measures such as mask requirements, enhanced cleaning, and in-vehicle partition screens. While these measures are critical, it is also important for Travel Managers to act on their own. A key goal of this study was to explore how travel programmes might respond to the pandemic.

### Travel Managers are interested in Coronavirus-related safety measures.

In the current COVID-19 environment, a large majority of Travel Managers are interested in using "preferred" ground transportation providers they have vetted to ensure they meet safety/sanitation standards (88%) and tracking data about ground transportation rides—such as destinations or driver names—to aid in contact tracing (79%). However, fewer are interested in allowing travellers to use micro-mobility services—such as bicycles or electric scooters for-rent—on short trips to avoid contact with other people (28%).

## Relationships build trust

### Travel programmes have preferred relationships:

Many travel programmes have formal agreements with ground transportation providers. Of the Travel Managers surveyed, a decent number say their company has a negotiated contract or preferred relationship with a rental car company (78%), a passenger rail company (54%), a ride-hailing technology company (50%), a limo/chauffeured car company (47%), or a car-share company (25%). A large majority of these respondents (80%) say they have had "some" (51%) or "many" (26%) conversations with their vendor(s) about COVID-19 sanitation efforts.

### Relationships build trust:

There are a variety of reasons why travel programmes have formal agreements with vendors. A formal agreement can help companies save money, streamline processes (e.g., payment and invoicing), and receive detailed reporting. However, the Coronavirus has underscored another key benefit: a formal relationship can foster communication and trust, and allow travel programmes to vet the safety practices of their vendors. It is not surprising, then, that in the current COVID-19 environment, almost nine in 10 Travel Managers (88%) are interested using "preferred" ground transportation providers they have vetted to ensure they meet safety/sanitation standards.

## It is not only Travel Managers who are interested in Coronavirus-related safety measures; business travellers are also interested in these same measures.

If they were to take a work trip in the current COVID-19 environment, most business travellers would be interested in using preferred ground transportation providers that their company has vetted to ensure they meet safety/sanitation standards and allowing their company to track data about their ground transportation rides—such as their destinations or driver names—to aid in contact tracing (i.e. to help notify their or others about possible exposure to COVID-19). Travel Managers are also interested in these same measures. However, there is one key difference when comparing business travellers and Travel Managers. While only about one-quarter of Travel Managers are interested in allowing travellers to use micro-mobility services in the current COVID-19 environment, more than half of business travellers are interested in using these services if they were to take a work trip in the current environment.

### % interested + very interested in Coronavirus-related safety measures

#### The Business Traveller's Perspective



	FR	DE	UK	ES	PL	PT	IT
Using "preferred" ground transportation providers that my company has vetted to ensure they meet safety/sanitation standards	75%	70%	77%	79%	85%	82%	60%
Allowing my company to track data about my ground transportation rides—such as my destinations or driver names—to aid in contact tracing (i.e. to help notify me or others about possible exposure to COVID-19)	66%	63%	62%	75%	71%	66%	57%
Using "micro-mobility" services—such as bicycles or electric scooters for-rent—on short trips to avoid contact with other people	54%	51%	53%	63%	64%	44%	45%

Q. If you were to take a business trip in the current COVID-19 environment, please rate your interest in the following (n=101-108)

## COVID-19 exposes the ground transportation "data gap"

### COVID-19 underscores the importance of travel programme data:

Data is essential for travel risk management. In a global pandemic, data allows companies to locate business travellers in affected hotspots. For instance, Italy imposed a nationwide lockdown in early March. Data would allow companies to identify employees who are travelling in Italy—especially in the hard-hit northern provinces— and reach out to assist them.

### The ground transportation "data gap":

In many cases, airline and hotel data comes automatically from corporate online booking engines (OBEs). This gives companies critical risk-related information— such as flight numbers and hotel locations. In general, ground transportation data is much more limited. If an employee takes a bus, taxi, scooter, or PHV, their company typically does not capture key details – such as the destination, driver name, licence number, or time of trip.

### Travel Managers want to collect ground data and business travellers are willing to share it:

In the current COVID-19 environment, a large majority of Travel Managers (79%) are interested in tracking data about ground transportation rides—such as destinations or driver names—to aid in contact such

as tracing (i.e. to help notify me or others about possible exposure to COVID-19). Similarly, roughly two-thirds of business travellers are interested in allowing their company to track data about their ground transportation rides—such as my destinations or driver names—to aid in contact tracing.

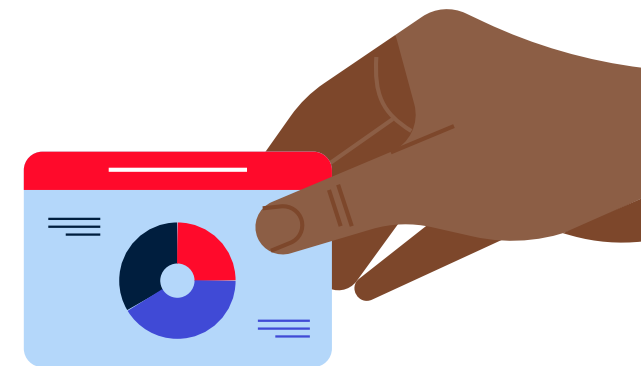
### How can this work?

There are several ways to gain access to better data about ground trips. Companies can encourage business travellers to use ride-hailing mobile apps. These apps track data about key trip details –such as destinations, driver names, and license plate numbers—which might be used in contact tracing. Travel programmes can also have a formal relationship with a ride-hailing technology company – such as FREE NOW for Business, Bolt Business, or Uber for Business. This gives them rich data about the rides their employees have taken through the app.

#### Travel Managers:

# 79%

are interested in tracking data about ground transportation rides



# The Evolution of Ride-Hailing: How Will It Change Travel Programmes?












1

# Business traveller views on ride-hailing

## % prefer to order traditional taxis or black cabs on business trips

### The Business Traveller's Perspective

							
Prefer to order taxis or black cabs on-demand through a mobile app	65%	63%	52%	50%	50%	45%	41%
Prefer to ask hotel or company to arrange a taxi	17%	20%	32%	28%	28%	41%	23%
Prefer to hail taxis or black cabs on the street	12%	10%	12%	14%	14%	12%	22%
Do not use traditional taxis or black cabs on business trips	5%	3%	3%	5%	7%	2%	8%
Don't know	1%	5%	1%	4%	2%	1%	6%

Regardless of transportation mode, business travellers regularly use mobile apps both on business trips and in their personal lives.

Whether ordering a traditional taxi or a ride-hailing provider, business travellers value the convenience and ease that comes with using an app. In fact, when ordering traditional taxis on business trips, travellers largely prefer using an app, followed by asking their hotel/company to arrange the ride. Few travellers report they do not use traditional taxis whilst on business travel, demonstrating an opportunity for alternative providers of ground transportation, including ride-hailing technology companies, to increase market share to this target group.

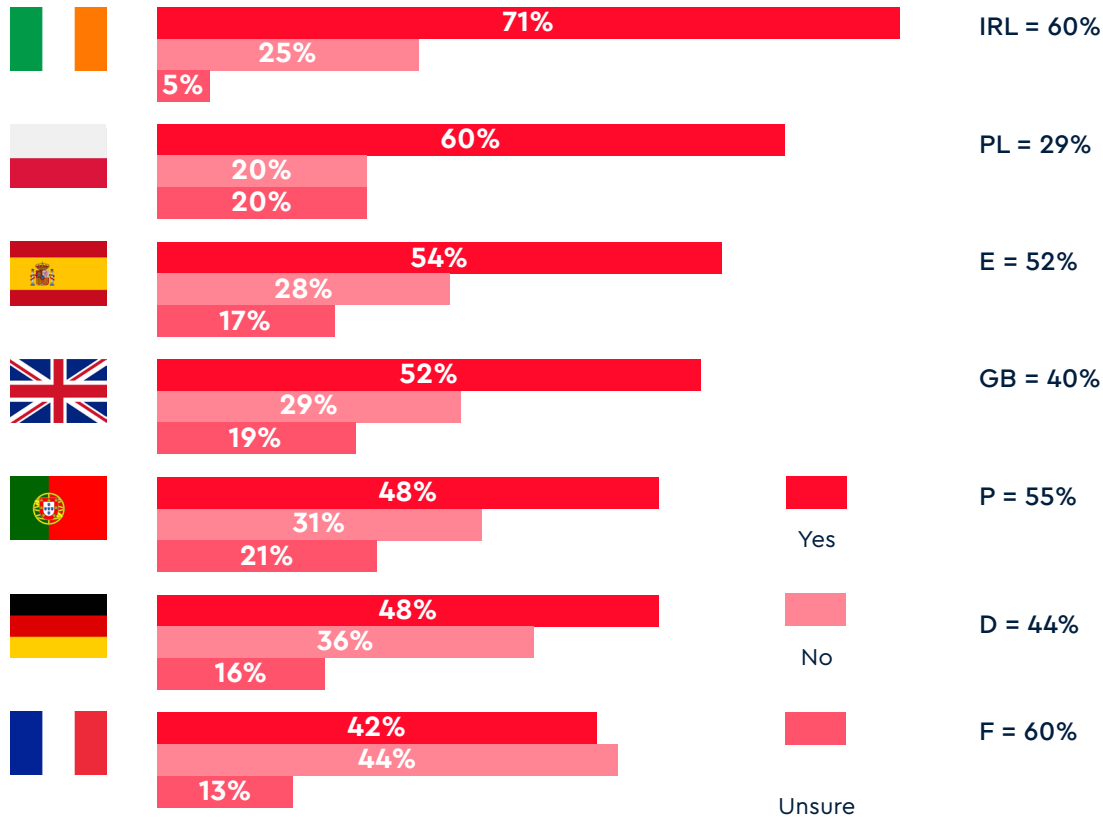
Q. If you were to take a business trip in the current COVID-19 environment, please rate your interest in the following (n=101-108)

## 2 Adoption of ride-hailing policies

### Does company have formal relationship with a ride hailing technology company?

*% very interested + interested if don't have formal relationship or are unsure*

#### The Business Traveller's Perspective



European business travellers use ride-hailing mobile apps with similar frequency for both business and personal trips. Given the popularity of ride-hailing among business travellers, it is not surprising that half (50%) of Travel Managers report their programme has a formal relationship, contract or account with a ride-hailing technology company. In addition, one-third (33%) of Travel Managers whose company does not have a formal relationship believe their company is likely to have one within the next year, demonstrating the growing acceptance of this method of ground transportation among business travellers. An additional two-thirds (33%) of travel managers say their programme is unlikely to enter a formal relationship with a ride-hailing company, whereas a further 33% are neutral to the idea. This demonstrates an opportunity for the industry to expand agreements with companies and increase market share by promoting the benefits of including ride-hailing technology partners in a corporate travel programme.

Business traveller awareness of company ride-hailing policies vary. In most markets, a majority of travellers know if their company has a formal relationship with a ride-hailing technology provider. In fact, few business travellers are unsure about their company's policy concerning ride-hailing providers, demonstrating strong traveller awareness and potential interest in ride-hailing.

Q. To the best of your knowledge, does your company have a formal relationship or contract with a ride-hailing technology company (e.g., FREE NOW for Business, Gett Business Solutions and Uber for Business)? (n=100-107)  
 Q. Would you be interested in your company having a formal relationship or contract with a ride-hailing technology company? (n=30-63)

As mentioned earlier, European business travellers use ride-hailing apps frequently for both work and personal car rides. In fact, except for Spain, Poland and Germany, business travellers in the key markets surveyed use ride-hailing apps in equal frequency for both business- and personal-related rides. This trend demonstrates ride-hailing is ingrained as a transportation option among business travellers in Europe. The widespread personal use of ride-hailing among business travellers explains why more travel programmes permit use for business travel as well.

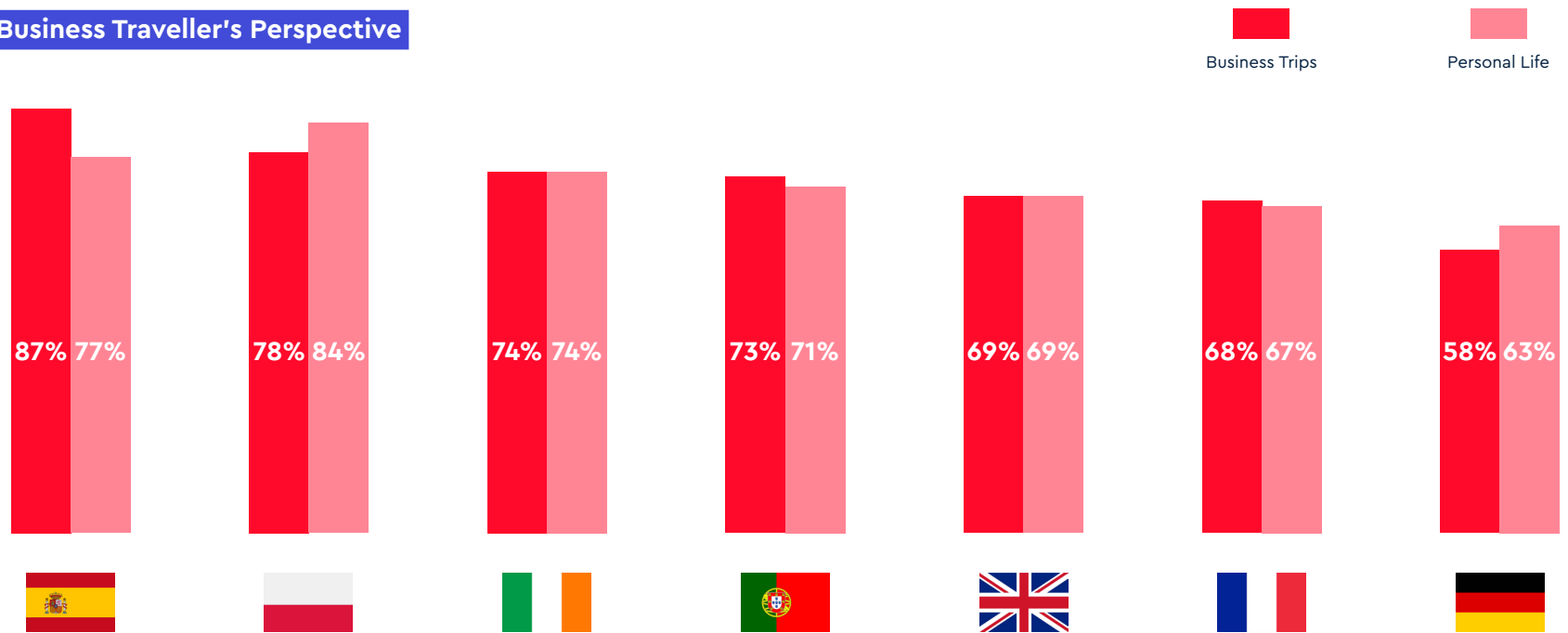
50%



of Travel Managers report their programme has a formal relationship, contract or account with a ride-hailing technology company.

### How often do you use a ride-hailing mobile app?

#### The Business Traveller's Perspective



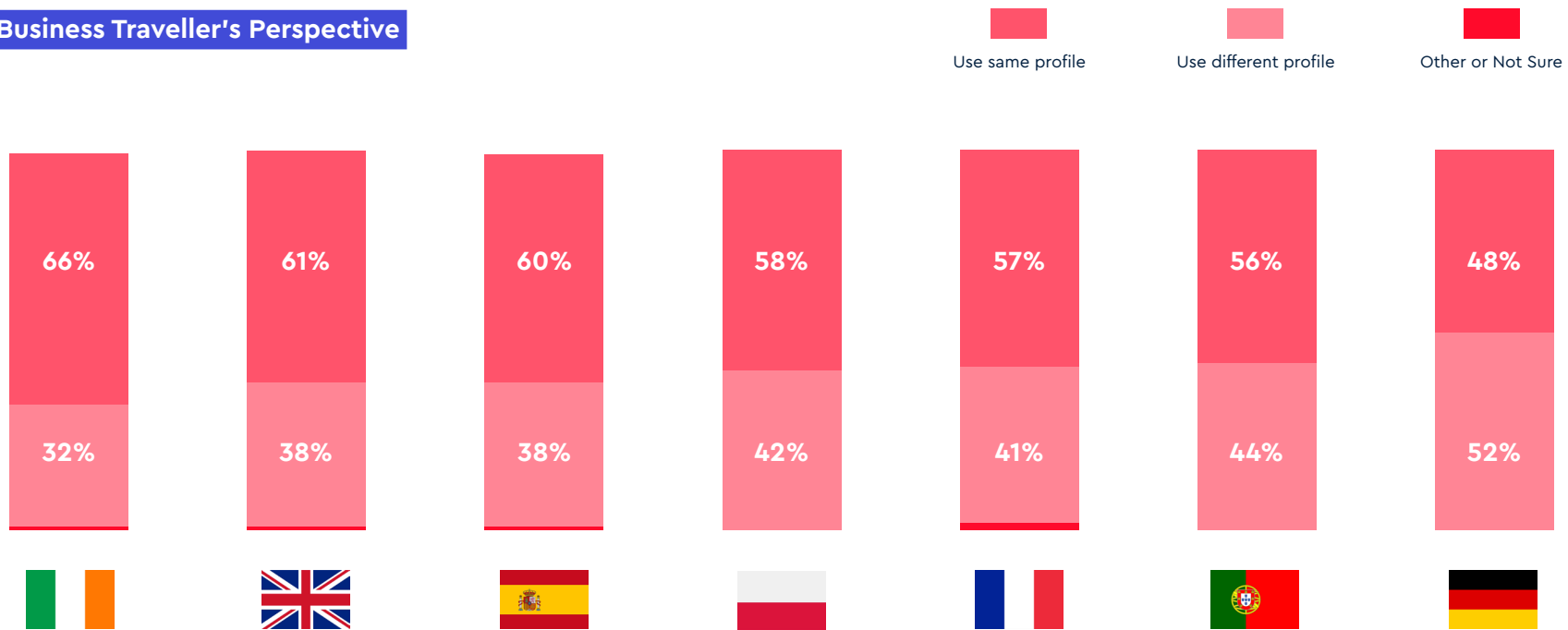
Q. When travelling on business trips, how often do you use a ride-hailing app? (n=57-81)  
 Q. In your personal life (when you are not traveling on business), how often do you use a ride-hailing mobile app? (n=64-88)

# 3 Business travellers: ride-hailing apps profiles and payments

Most business travellers who use ride-hailing apps largely use the same profile for both business and personal rides, however a sizeable minority have separate profiles depending on travel purpose (i.e., personal vs. business rides). Several reasons might explain this trend, including travellers might use different ride-hailing providers than their company's agreement or contract, a desire to keep personal and work rides separate or ease of submitting expenses for reimbursement. In addition, EU GDPR concerns might account for different profiles for some business travellers, particularly in Germany.

## Profiles used for ride-hailing apps on business trips

### The Business Traveller's Perspective



Q. You mentioned you at least sometimes use a ride-hailing app on business trips. Which best applies? (n=58-70)

Business travellers cite a host of reasons for using different ride-hailing accounts and/or profiles. Most say they use different payment methods and/or different app profiles to make expense reporting easier. In addition, most business travellers use different payment methods for business trips and personal trips, likely due to many having corporate credit cards which can make expense reporting easier.

### % use different ride-hailing accounts for business trips than personal trips

#### The Business Traveller's Perspective



I prefer to keep receipts separate to make expense reporting easier

67%

64%

61%

60%

59%

52%

46%

I use a different ride-hailing app on business trips than I use on personal trips

48%

35%

17%

26%

24%

15%

33%

I use a different payment method on business trips than I use on personal trips

29%

56%

30%

58%

53%

50%

42%

I have a separate "for business" profile

27%

44%

39%

53%

44%

31%

35%

Q. You mentioned you use a different ride-hailing account/profile on business trips than you do on personal trips. Which of the following are reasons why? Please select all that apply.(n=48-77)



## How do travellers pay when using ride-hailing providers?

Business travellers in Europe largely use their personal credit cards for payment for rides ordered through a ride-hailing app and then receive reimbursement from their employer. This is generally consistent across the seven countries surveyed, however there are some differences.

### Personal payment:

Use of personal payments when travelling for business is highest in Ireland (69%) and France (64%), followed by business travellers in Germany (57%), the United Kingdom (53%) and Poland (52%). Many companies recognise their travellers use ride-hailing in their personal lives and as such, allow the option to use personal payments and will reimburse for rides on business trips. In addition, not all companies provide corporate credit cards or company payment mechanisms for business travel.

### Company-provided payment:

A majority of business travellers in Portugal (58%) and Spain (54%) use company-provided payments (either with a corporate credit card or central company account). Company contracts or agreements likely play a role, as travellers might prefer (or be required) to use a company-sanctioned payment for business travel.

## 4

## Critical ride-hailing app criteria for both managers and travellers

Travel Managers value different features of ride-hailing mobile apps.

When thinking about having a formal relationship with a ride-hailing technology company, they say a number of features are important. They most commonly include in the top 3 (out of 11 possible) easy to book, cost, and short wait times/availability of rides.

### What are the most important features of a ride-hailing mobile app platform?

#### The Travel Manager's Perspective



Q. When thinking about having a formal relationship with a ride-hailing technology platform, what are the most important features? Please select up to 3. (n=99)

### Business travellers also value ride-hailing mobile apps.

For business travellers, the most important features (out of eight possible) are easy to book, short wait times/availability of rides, and cost. These are the same as the most important features most commonly identified by Travel Managers.

#### How important are features of ride-hailing apps?

##### The Business Traveller's Perspective



	France	Germany	United Kingdom	Spain	Poland	Portugal	Ireland
Easy to book	63%	43%	51%	56%	54%	59%	52%
Short wait times/availability of cars	51%	46%	40%	51%	62%	37%	54%
Cost (e.g., sign-up fees, subscription fees, admin fees)	45%	31%	37%	34%	37%	51%	30%
Different types of services available through same app <small>(e.g. traditional taxis, private-hire vehicles, bicycles, car-share, etc.)</small>	33%	34%	25%	39%	32%	28%	27%
Automatically billing rides to corporate credit card or central company account	26%	39%	26%	30%	39%	25%	29%
Policy enforcement <small>(i.e. only allowing rides at certain times; only requesting rides from drivers that meet their company's safety standards)</small>	15%	32%	38%	32%	21%	37%	37%
Automatically importing receipts to expense management platform	16%	26%	29%	23%	24%	29%	34%
Allowing my company to track my whereabouts	15%	20%	22%	14%	16%	17%	18%

Q. What are the most important features of a ride-hailing mobile app when travelling on business? Please select up to 3? (n=98-109)



## Business travellers and Travel Managers step into each other's shoes

Travel Managers and business travellers value similar features of ride-hailing mobile apps. However, several key points stand out when analysing their preferences.

### Travel Managers care about the trip experience:

Travel Managers care about the trip experience for their company's employees. When thinking about having a formal relationship with a ride-hailing technology company, they say the most important features are easy to book, cost, and short wait-times. Two of these features—easy to book and short wait-times—deal primarily with the trip experience. Travel Managers say these are more important than other key features—such as automated billing and quality of data—which make their own lives easier. In other words, they are not only looking for a product that meets their own needs; they want to meet their travellers' needs first.

### Both groups value automated billing/invoicing:

Automated billing and invoicing is a key feature for 75% or more European Travel Managers and business travellers (depending on country). A formal agreement with a ride-hailing company can simplify billing. Travellers do not need to pay with their own money and request reimbursement from their company. The ride-hailing provider can automatically bill or invoice the traveller's company for rides taken through the app. This can help the traveller and the company save time. The traveller spends less time filling out expense reports; the company spends less time reviewing expense claims and reimbursing travellers.

### Policy enforcement is a key feature for some business travellers:

Some business travellers say policy enforcement is one of the most important features of a ride-hailing app. In the United Kingdom, Portugal, and Ireland, more than one-third of travellers include policy enforcement as one of the most important features. In other words, many business travellers want to follow the

rules that their company puts in place for them. In some cases, they might not know what the rules are. For instance, does their company allow them to use micromobility services? Does it allow PHVs, or trips after work hours? When travel programmes have a formal relationship with a ride-hailing company, they can configure the app to automatically apply policies. For instance, they can only allow certain types of rides (e.g., traditional taxis) or rides at certain times.



### Travel Managers are satisfied with their ride-hailing provider.

Of the travel programmes that have a formal-relationship with a ride-hailing company, three-quarters (80%) are satisfied with the platform their company uses.

### Business travellers identify benefits of using ride-hailing apps on work trips.

Most commonly included in the top five (out of 11 possible) are convenience, safer than public transportation, and price.

#### What do business travellers like most about using ride-hailing apps?

##### The Business Traveller's Perspective



	France	Germany	United Kingdom	Spain	Poland	Portugal	Ireland
Convenience	50%	47%	52%	35%	67%	45%	51%
Safer than public transportation	43%	46%	46%	60%	46%	42%	52%
Price	44%	39%	39%	52%	36%	57%	38%
Don't have to use cash	34%	43%	31%	34%	45%	52%	47%
The driver knows where I need to go even if I don't speak the language	31%	33%	36%	41%	47%	38%	43%
Can select type of car	33%	40%	29%	30%	43%	32%	28%
Receipts provided digitally, making expense reports easier	27%	41%	31%	32%	27%	29%	51%
Increases options for travelling while travelling for work	24%	35%	30%	34%	31%	39%	45%
My company has a preferred relationship with a ride-hailing app provider	23%	32%	24%	33%	19%	28%	36%
Creates jobs	17%	17%	18%	28%	27%	39%	26%
Use it in my personal life so I am used to it	16%	20%	20%	17%	21%	21%	26%

Q. What do you like most about using ride-hailing while travelling for business? (n=99-110)

## Business travellers also identify concerns with using ride-hailing apps on work trips.

Most commonly included in the top five concerns (out of 11 possible) are safety, possible greater risk for becoming infected with COVID-19, and cleanliness.

### What concerns business travellers about using ride-hailing apps?

#### The Business Traveller's Perspective



	France	Germany	United Kingdom	Spain	Poland	Portugal	Ireland
Safety	37%	42%	42%	56%	39%	59%	56%
Possible greater risk for becoming infected with COVID-19	34%	39%	42%	61%	38%	52%	49%
Cleanliness	38%	37%	43%	52%	37%	54%	46%
Unlicensed and/or uninsured drivers	35%	29%	39%	41%	44%	38%	38%
Increases traffic and congestion, emissions, and vehicles on the road	24%	26%	31%	36%	30%	27%	42%
Privacy concerns (GDPR)	23%	38%	34%	21%	33%	31%	25%
Unreliable	16%	41%	35%	27%	35%	29%	31%
Drivers can earn low wages	33%	25%	27%	21%	21%	21%	29%
Discourages use of public transportation	20%	22%	21%	24%	27%	20%	36%
Difficult to report driver to the company if there is a problem	21%	25%	30%	18%	26%	35%	35%
Not allowed in company travel programme	21%	24%	19%	15%	14%	29%	29%

Q. What concerns you the most about using ride-hailing for business trips? Please select up to 5. (n=100-110)

# Conclusion



In recent years, the ground transportation landscape has changed dramatically. Business travellers have more ground transportation options than ever before—including car-sharing and micro-mobility—and frequently use mobile apps to order rides. Over a few months, the Coronavirus has upended ground transportation further – transforming supplier practices, travel programme priorities, and business traveller behaviour and preferences. This research suggests several steps Travel Managers can take to adapt to a fast-changing industry:

## 01. Review travel policies:

Travel policies have not kept up with the rapid pace of change in the ground transportation industry. In Europe, a decent number of policies do not even address car-sharing, bicycles for-rent, and electric scooters for-rent. This can create confusion when travellers want to use these services.

## 02. Focus on sustainability:

Almost half of European Travel Managers (46%) say sustainability is one of the greatest pain points with their ground transportation programme. This is higher than the share who indicated any other pain point. The Coronavirus can make sustainability an even greater challenge. Many travellers are less likely to take public transit or share rides with colleagues. However, travel programmes can focus on other sustainability measures – such as renting electric cars or taking electric taxis/PHVs.

## 03. Consider formal relationships:

There are many reasons why companies have formal agreements with ground transportation providers. A formal relationship can help companies save money, streamline processes (e.g., payment and invoicing), and receive data and reporting. However, the Coronavirus has underscored another key benefit: A formal relationship can foster communication and trust, whilst also allowing travel programmes to vet the safety practices of their vendors. While most travel programmes (78%) in Europe have a formal agreement with a car rental company, fewer have one with a ride-hailing vendor (50%), limo/chauffeured car company (47%), or car-sharing company (25%). When they have a formal relationship, Travel Managers should discuss safety and sanitation with the vendor.

## 04. Capture data:

Data is essential for risk management. In the event of a Coronavirus outbreak, travel data can potentially be used for contact tracing. Yet while travel programmes commonly have data about flights and hotel stays, they have more limited data about ground transportation rides. Companies can encourage travellers to rent cars using the online booking engine (OBE), or when taking a taxi use a ride-hailing mobile app which captures key trip details such as destinations, driver names, and licence plate numbers.

# United Kingdom Market Snapshot



Statistics show that business travellers in the United Kingdom use ride-hailing apps for their business and personal lives in equal measure.

In fact, seven in ten (69%) use ride-hailing apps "often" or "sometimes" on business travel, as well as in their day-to-day outside of work. This also demonstrates that whatever the trip purpose, there is little distinction in which ride-hailing providers are used. However, approximately one in three (31%) British travellers report "rarely" or "never" using ride-hailing mobile apps, irrespective of travel purpose. Travel programmes should consider keeping policies flexible – accounting for the diverse behaviours and attitudes of UK business travellers toward ride-hailing.



I just think the fact that people are using the [ride-hailing] companies in their private lives, they're used to it, they're accustomed to doing it. I think for us, I don't have any qualms about using a company like Uber if Uber can demonstrate to me that they will take responsibility when the chips are down.

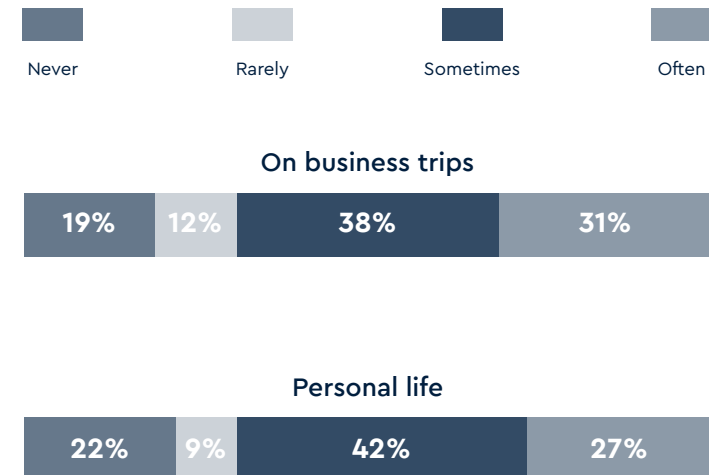


– London-based Travel Manager, Multinational Financial Services Provider

The Travel Manager's Perspective

How often do business travellers use ride-hailing mobile apps...?

## UK-Based Traveller's Perspective



Half (52%) of British business travellers say their company has a formal agreement or contract with a ride-hailing technology company and one in five (19%) are unsure. This likely explains why a sizeable minority of British travellers (22%) do not use ride-hailing providers on business travel: a lack of awareness of company travel policies. There is an opportunity for providers to work with companies when agreements are signed, to encourage communication about which ride-hailing options are included in their travel policies.

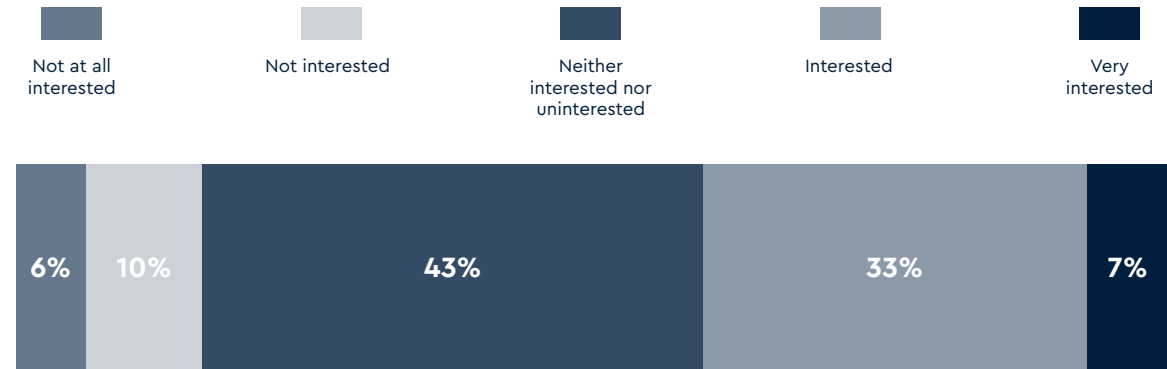
**Two in five (40%) UK business travellers whose company does not have a formal relationship with a ride-hailing technology company, would like their company to have one.**

This is low compared to other markets surveyed, but still a significant number. That being said, four in five (43%), do not have a relationship at all. This is one of the highest statistics among the European markets examined. Given the higher indifference among British business travellers, providers have an opportunity to promote the benefits of ride-hailing as an option for business travel to Travel Managers. This could lead to increased interest and, ultimately, agreements with companies.

Two-thirds (65%) of British business travellers are required to follow their company's travel policies – the highest among any of the European countries examined. With this in mind, it is important for ride-hailing ground transportation to be permitted in company travel policies. Travel Managers and other decision-makers are a critical audience with regards to increasing traveller ridership.

## Are business travellers interested in their company having a formal relationship with a ride-hailing technology platform?

### UK-Based Traveller's Perspective



Q. Would you be interested in your company having a formal relationship or contract with a ride-hailing technology company?

Note: Question only displayed to business travellers who indicated their company does not have a formal relationship with a ride-hailing technology company. (n=31)

A majority of British business travellers (80%) report that their organisation uses a corporate travel agency or travel management company – one of the highest figures in Europe. Additionally, the same percentage of travellers can book travel using this agency or company. This suggests travel is generally more managed in the United Kingdom compared to other European countries, therefore providing excellent travel data is critical.

In a non-pandemic environment, British business travellers are interested in using long-distance passenger rail/trains (79%), traditional taxis (70%), rental, and PHV/independent drivers (68% each). In addition, almost half are interested in bicycles for rent (48%) and electric scooters (46%),

demonstrating an interest in micro-mobility. While interest in most forms of ground transportation declines in the current Covid-19 environment, interest in private hire vehicles and/or independent drivers remains essentially the same (68% vs. 66%). This is an opportunity for providers to capitalize on the existing comfort and enthusiasm British travellers have with this mode of ground transportation. They can do so via marketing and communication efforts.

## Business travellers in the United Kingdom are interested in coronavirus-related safety measures, particularly using preferred ground transportation providers.

Three in four (77%) are interested in using preferred (and vetted) ground transportation providers that meet safety/sanitation standards and allow their company to track data in order to aid contact tracing (62%). In addition, British business travellers are interested in micro-mobility services as a means of avoiding close contact with other travellers (53%). Approximately one in five Britons do not have an interest either way, suggesting that there is industry opportunity to promote alternative options and ways of helping to ensure traveller safety.

### Are British business travellers interested in...?

#### UK-Based Traveller's Perspective



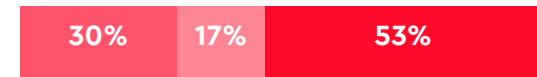
Use "preferred" ground transportation providers that my company has vetted to ensure they meet safety/sanitation standards



Allow my company to track data about my ground transportation rides—such as my destinations or driver names—to aid in contact tracing (i.e. to help notify me or others about possible exposure to



Use "micro-mobility" services—such as bicycles or electric scooters for-rent—on short trips to avoid contact with other people



Q. If you were to take a business trip in the current COVID-19 environment, please rate your interest in the following? (n=104)



So every trip for me is a project. Whether it was COVID or not, there are key things that you need to ensure that your traveller is aware of and that they are safe. And we are responsible for them from the moment they leave their home or office to go away and then coming back.

– London-based Travel Buyer, Multinational Financial Services Provider



#### The Travel Manager's Perspective

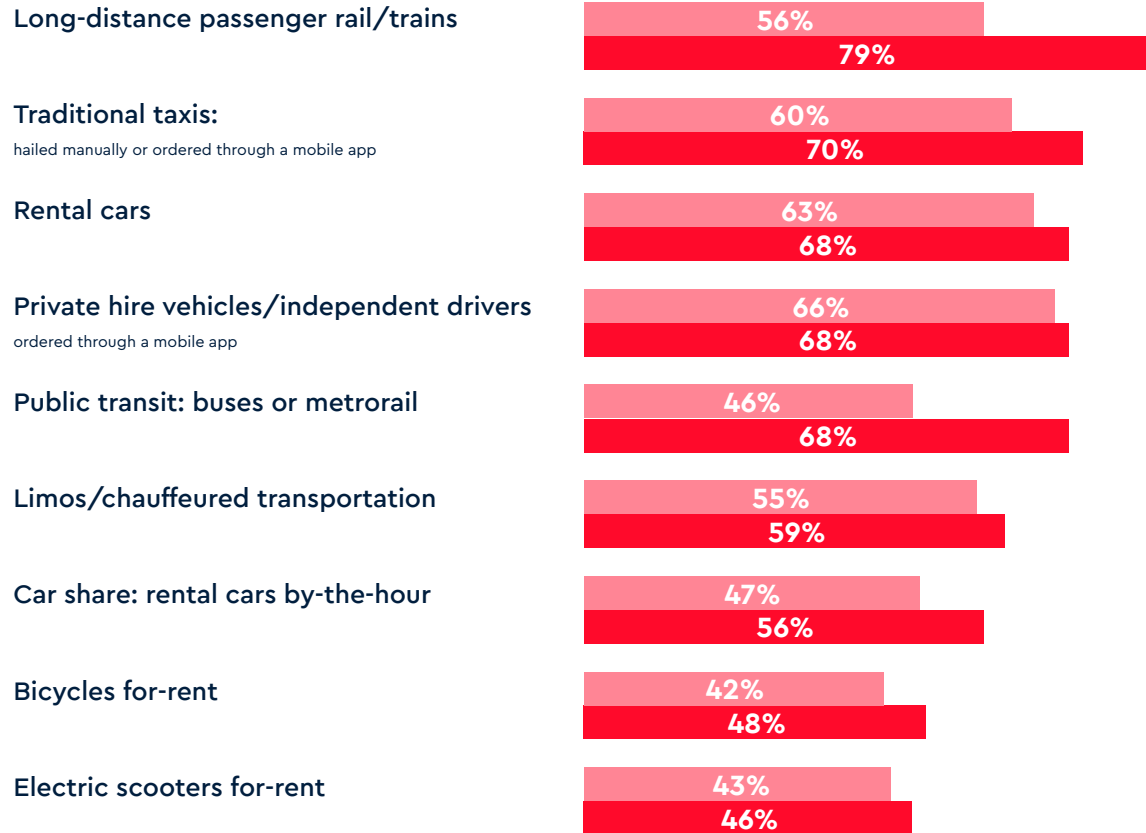
### The concerns of UK travellers who use ride-hailing for business centre on cleanliness, increased Covid-19 risk, and safety.

In addition, British business travellers are concerned about unlicensed/uninsured drivers and the reliability of ride-hailing providers. Messaging surrounding cleanliness, safety and reliability will resonate well in the current Covid-19 environment and beyond.

## Interest in Ground Transportation for Business Travel

### Ireland-Based Traveller's Perspective

■ Current Covid Environment
 ■ Normal, Non-Pandemic Environment



Q. In a normal environment (without a global pandemic), please rate your interest using each of the following modes of ground transportation while traveling on business (n=110)  
 Q. If you were to take a business trip in the current COVID-19 environment, please rate your interest in using each of the following modes of ground transportation (n=110)



# Methodology

This study is based on results from two surveys—one of business travellers and one of corporate Travel Managers. The survey of business travellers polled an online panel provided by the company Qualtrics. Data collection took place in between September 3, 2020 and September 20, 2020. It included business travellers in Germany, France, the United Kingdom, Spain, Poland, Portugal and Ireland.

## Respondents qualified for the study if they met the following criteria:

- They are at least 18 years of age
- They are employed (full-time or part-time)
- They travelled for business at least three times in 2019
- Their company uses a corporate travel agency/TMC OR gives them the option to book through an online booking engine (OBE)

## In total, 739 business travellers completed the survey including:

- Germany (98)
- France (109)
- United Kingdom (108)
- Spain (105)
- Poland (107)
- Portugal (106)
- Ireland (103)

Quotas and weighting were used to ensure the sample matches the population of employed people in each of the seven countries.

The survey of Travel Managers polled members and non-members of GBTA in Germany, France, United Kingdom, Spain, Poland, Portugal and Ireland. Respondents qualified if they are at least "a little involved" when it comes to "managing or overseeing ground transportation policies, processes, or vendors at [their] company."

## In total, 174 Travel Managers completed at least one question. Of these, 144 qualified to take the survey and 103 completed the entire survey including:

- Germany (18)
- France (23)
- United Kingdom (25)
- Spain (25)
- Ireland (10)
- Poland (2)

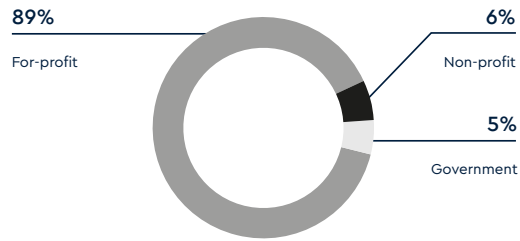
# Respondent Profile



# 1 Travel Managers

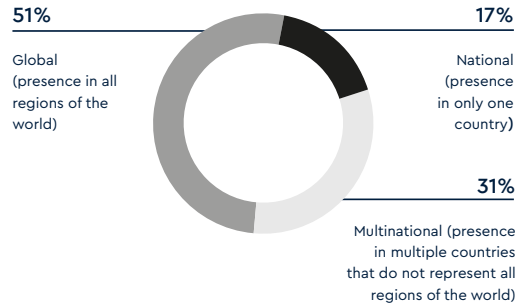
Which of the following best describes your organisation? (n=103)

**The Travel Manager's Perspective**



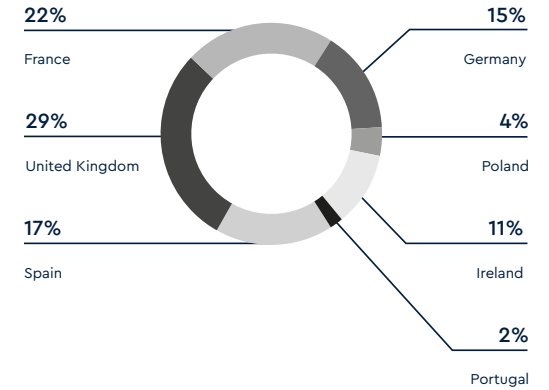
How would you define your company's reach? (n=103)

**The Travel Manager's Perspective**



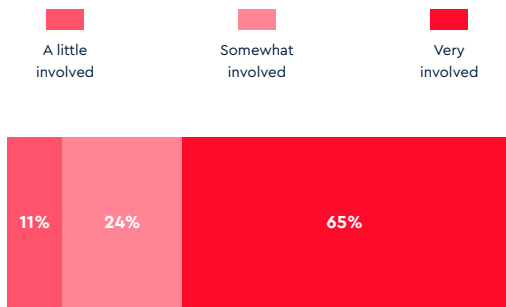
In which of the following countries are you based? (n=174)

**The Travel Manager's Perspective**



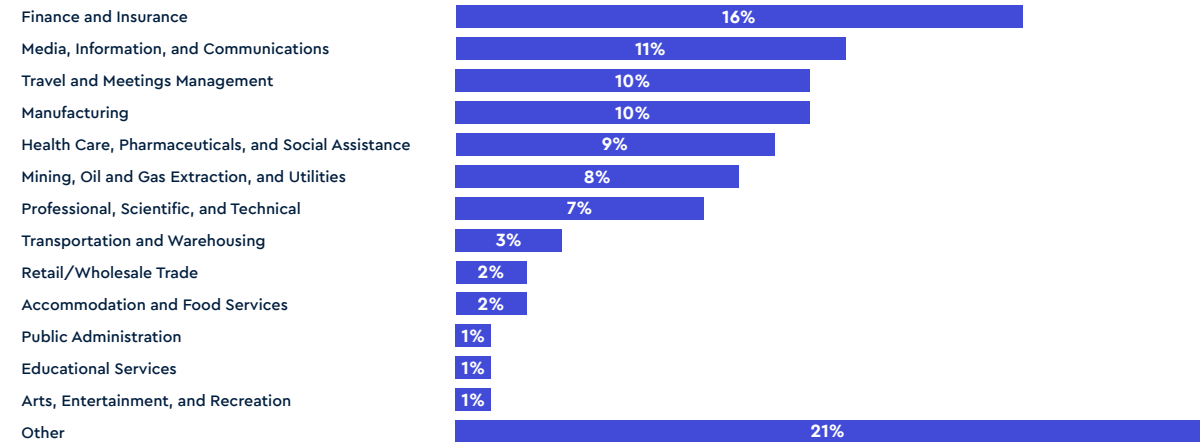
Please rate your involvement when it comes to managing or overseeing ground transportation policies, processes, or vendors at your company. (n=144)

**The Travel Manager's Perspective**



Which of the following industries best describes your organisation? (n=102)

**The Travel Manager's Perspective**



# 2 Business Travellers

## Respondent Profile: Business Travellers<sup>3</sup>

### The Business Traveller's Perspective



By which gender do you identify?

Female	51%	48%	53%	43%	44%	44%	45%
Male	49%	52%	47%	57%	56%	56%	55%

Please select the appropriate age category for yourself.

18 to 24 years	60%	58%	68%	65%	67%	58%	57%
25 to 34 years	56%	50%	56%	52%	64%	50%	52%
35 to 44 years	43%	52%	59%	44%	54%	34%	48%
45 to 54 years	46%	41%	48%	52%	57%	35%	53%
55 years +	39%	44%	46%	40%	44%	31%	53%

Which of the following best describes your employment status?

Employed full-time	92%	89%	79%	92%	95%	93%	86%
Employed part-time	8%	11%	21%	8%	5%	7%	14%

3. Note: Percentages shown in this table are after weighting for age and gender

## Respondent Profile: Business Travellers (Cont.)<sup>4</sup>

### The Business Traveller's Perspective



In 2019, how many business trips have you taken where you travelled at least 30 kilometres from your home? Your best estimate is fine.

3 to 5 trips	31%	54%	41%	44%	48%	40%	37%
6 to 11 trips	26%	30%	36%	33%	21%	23%	30%
12 to 24 trips	60%	58%	68%	65%	67%	58%	57%
25 or more trips	56%	50%	56%	52%	64%	50%	52%
Not sure	43%	52%	59%	44%	54%	34%	48%

When you travel for work, which of the following best describes your company's travel policies? Travel policies include rules like whether or not you are allowed to fly first class, the type of hotel room you are allowed to choose, which ground transportation to use, etc.

I must follow my company's travel policies	61%	52%	65%	48%	49%	58%	56%
I am encouraged to follow general guidelines	25%	35%	25%	36%	38%	25%	33%
I have no restrictions or company guidelines to follow	14%	13%	10%	16%	13%	17%	11%

To the best of your knowledge, does your organisation use a corporate travel agency or travel management company (TMC) for any product or service?

Yes	54%	75%	80%	81%	62%	78%	74%
No	32%	17%	15%	12%	22%	12%	20%
Not Sure	14%	8%	5%	7%	16%	10%	6%

4. Note: Percentages shown in this table are after weighting for age and gender

## Respondent Profile: Business Travellers (Cont.)<sup>5</sup>

### The Business Traveller's Perspective



Does your organisation or its travel management company/agency give you the option to book travel through a corporate online booking tool? Note: These DO NOT include consumer travel websites such as Expedia, Booking.com, or Hotels.com that can be used without your organisation having a contract or subscription.

Yes	83%	90%	81%	77%	91%	75%	87%
No	13%	7%	15%	19%	6%	22%	10%
Not sure	3%	3%	4%	4%	3%	3%	3%

Thinking about your most recent business trip, when did you depart?

Before 15 March 2020	65%	68%	76%	68%	71%	83%	83%
After 15 March 2020	34%	30%	23%	32%	29%	17%	17%
Not sure	1%	2%	1%	1%	0%	0%	1%

To the best of your knowledge, does your organisation use a corporate travel agency or travel management company (TMC) for any product or service?

Yes	54%	75%	80%	81%	62%	78%	74%
No	32%	17%	15%	12%	22%	12%	20%
Not sure	14%	8%	5%	7%	16%	10%	6%

5. Note: Percentages shown in this table are after weighting for age and gender

## Respondent Profile: Business Travellers (Cont.)<sup>6</sup>

### The Business Traveller's Perspective



Which of the following best describes your position?

Administrative/ Support Staff	25%	19%	28%	32%	24%	24%	19%
Middle Management	44%	59%	50%	44%	58%	38%	50%
Upper Management	16%	16%	12%	17%	18%	34%	30%
C-Level	14%	6%	10%	8%	1%	5%	1%

How many employees does the organisation you work for have across all locations?

101 or fewer employees	22%	7%	11%	23%	33%	35%	18%
101 to 1,000 employees	44%	50%	41%	43%	42%	33%	37%
More than 1,000 employees	32%	52%	48%	34%	23%	32%	45%
Not sure	3%	1%	0%	0%	2%	0%	1%

In 2019, did you travel for business to...?

Domestic destinations only	52%	39%	44%	48%	42%	23%	17%
International destinations only	11%	13%	13%	6%	5%	8%	38%
Both domestic and international destinations	36%	48%	43%	46%	54%	69%	45%

6. Note: Percentages shown in this table are after weighting for age and gender

# About GBTA & FREE NOW for Business



## GBTA

The Global Business Travel Association (GBTA) is the world's premier business travel and meetings trade organization headquartered in the Washington, D.C. area with operations on six continents. GBTA's 9,000-plus members manage more than 345 billion dollars' worth of global business travel and meeting 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](http://www.gbta.org).



## FREE NOW for Business

FREE NOW is the multi-service mobility joint venture backed by BMW Group and Daimler AG. Next to ride-hailing, FREE NOW also offers micro-mobility services and car-sharing. FREE NOW for Business is the tailor-made ride-hailing solution that simplifies the daily management of employees' business trips, by offering different payment and invoicing methods or orders for guests. Whether for business meetings, train station/airport trips or home-office journeys, the FREE NOW for Business solution has been designed to offer Travel Managers and their employees reliable, safe and responsible business travel, guaranteeing the best possible experience. Today, FREE NOW for Business has 30,000 client companies across Europe and is available in 10 countries.



# Want to know more?

[Contact our team!](#)

See you soon,  
aboard our vehicles!

