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INTRODUCTION

BUSINESS TRAVEL IS EVOLVING AT A RAPID PACE.

The changes are being driven by a multitude of factors, including:
• The return to travel since the COVID-19 pandemic
• New employee work patterns and remote/hybrid working
• Increasing pressures to promote sustainability
• Technological advances (such as AI, machine learning, smart devices, datafication, new energy solutions, blockchain, edge and quantum computing)

In this update of our **2020 GTBA FREENOW whitepaper,** we've once again conducted a survey of European business travellers and travel managers to assess ground transport's changing landscape. We re-examine the state of ground business travel in seven key markets:

KEY HIGHLIGHTS

1. European travel managers are winning at policy enforcement but struggling with traveller satisfaction.

When asked to indicate the top three strengths of their ground transport programme (out of seven options), travel managers most commonly include policy enforcement, traveller safety/duty of care, cost savings and ease of payment/expense management. However, they also recognise the challenges and pain points of their programme. The most frequent top three pain points include traveller satisfaction, reporting/spending visibility and sustainability.

WHY THIS MATTERS
A successful ground transportation programme entails multiple components. Focusing on these key components and continuously working to enhance traveller satisfaction, reporting capabilities and sustainability efforts, travel managers can create a more successful and well-rounded ground transportation programme that aligns with corporate goals and values.

2. On average, European travel managers say 30% of their company's ground transport spend is on public transportation.

In addition, approximately 20% of spend is allocated to traditional taxis and 14% allocated to private hire vehicles. For comparison, the 2020 GBTA-FREENOW study found average spending on public transport accounted for just 16% of ground transportation spend and 18% was spent on private hire vehicles. The shift towards increased spending on public transport and the corresponding decrease in spending on rental cars and private hire vehicles suggests increased sustainability efforts in travel programs.

WHY THIS MATTERS
European travel programmes demonstrate their commitment to sustainability efforts by allocating a higher percentage of ground spending to public transport. The decrease in spending on private hire vehicles suggests a shift towards more eco-friendly alternatives - like public transport and electric taxis.

POLICY VS. SATISFACTION

PUBLIC TRANSPORT

RIDES-HAILING APPS

MULTIPLE MODES OF TRANSPORT

CARBON EMISSIONS

3. Business travellers like the convenience of ride-hailing apps.

"Ease of booking", "shorter wait times/availability of rides", and "cost" were all highlighted as important features of ride-hailing apps by business travellers.

However, they also value features only available when their company has a formal relationship or contract with a provider, including automatically importing rides to expense reporting systems and allowing their company to configure the app to enforce travel policies.

WHY THIS MATTERS
As ride-sharing is a popular means of ground transportation for business travellers, travel programmes can really benefit from entering a formal relationship and/or contract with a ride-hailing provider to help enforce travel policies and improve the traveller experience.

4. Travel managers are very interested in contracting with companies that offer multiple types of ground transport.

Modes of transport that travel managers were interested in included rental cars, carsharing, private hire vehicles (PHVs)/ride-shares, eScooters and eBikes. In fact, half (53%) of travel managers express interest in contracting with the same provider for multiple ground products or services.

WHY THIS MATTERS
Establishing a formal contract with a company (or companies) that provide multiple ground transportation services would help streamline expenses, thus increasing overall efficiencies in the travel programme. In addition, communication with employees and training on how to use contracted services effectively are key to maximising the benefits of contracts and ensuring a positive traveller experience.

POLICY VS. SATISFACTION

PUBLIC TRANSPORT

RIDES-HAILING APPS

MULTIPLE MODES OF TRANSPORT

CARBON EMISSIONS

5. Travel managers find it is difficult to track carbon emissions generated by ground transportation.

Half of European travel managers feel it is more difficult to track carbon emissions from ground transportation compared to other categories. In addition, a significant number of travel managers are unsure of the percentage of electric vehicle bookings for ridesharing, rental cars or limos/chauffeured cars suggesting there is an information gap.

WHY THIS MATTERS
Travel programmes need data and metrics on carbon emissions generated from their business travellers. Ground transportation suppliers that can provide emissions data efficiently and in a user-friendly manner are likely to be well-received by travel managers.

By providing CO2 reporting, transportation providers can improve data-driven decision making, performance benchmarking, transparency and employee engagement.

POLICY VS. SATISFACTION

PUBLIC TRANSPORT

RIDES-HAILING APPS

MULTIPLE MODES OF TRANSPORT

CARBON EMISSIONS

CURRENT STATE OF GROUND TRANSPORTATION POLICIES

The Travel Manager's Perspective

How Travel Managers characterise their company's approach to Ground transportation now vs. 2019?

Q. Compared to 2019 (pre-pandemic), how would you describe your company's approach to ground transportation today? (n=152)

More focused on sustainability and eco-friendly vehicles — **38%**

More cost-focused — **22%**

More employee experience-focused — **12%**

Approach hasn't changed — **24%**

Other — **5%**

When European travel managers were asked to cite their company's single greatest priority as it relates to ground transportation, half (49%) cited cost containment/savings, followed by sustainability (22%) and employee experience (12%).

While cost containment remains a top priority for travel programmes, the COVID-19 pandemic impacted how many corporates approach ground transportation. The 2020 study, for example, found many European travel programmes emphasised rental car and other transport modes that minimised direct contact with others to try and mitigate exposure risk for their travellers.

Today, sustainability and eco-friendly ground transportation options are a higher priority in many programmes compared to pre-pandemic 2019. In fact, when asked to pick how their company's approach to ground transportation has changed the most since before the pandemic (2019), nearly two-fifths (38%) of travel managers say it is more focused on sustainability and eco-friendly vehicles. An additional one in four (24%) European travel managers say their company's approach to ground transportation has not changed since 2019, but one in five (22%) characterise their company's approach as more cost-focused.
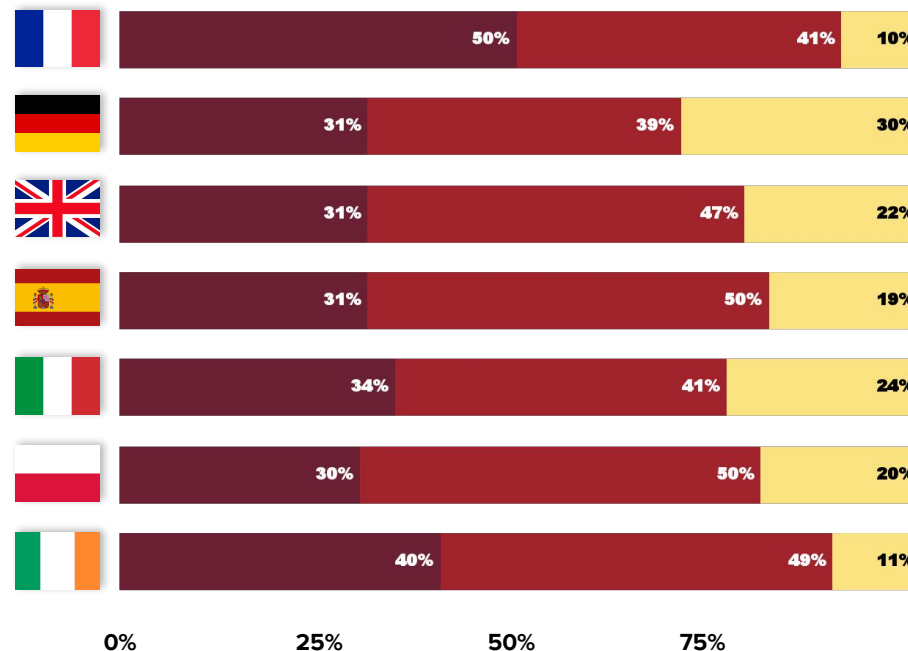
The Business Traveller's Perspective

What is your single greatest priority when choosing ground transportation on business trips?

- ■ **Cost containment:** Limiting the cost of ground transportation; helping my company save money or contain cost
- ■ **Comfort/experience:** Having a pleasant experience while travelling; maximising my comfort, time, or productivity
- ▢ **Sustainability:** Limiting or reducing carbon emissions from my ground transport

Country	Cost containment	Comfort/experience	Sustainability
France	50%	41%	10%
Germany	31%	39%	30%
UK	31%	47%	22%
Spain	31%	50%	19%
Italy	34%	41%	24%
Poland	30%	50%	20%
Ireland	40%	49%	11%

0% 25% 50% 75%

Q. What is your single greatest priority when choosing ground transportation on business trips? (n=104-112)

From the business traveller perspective, their greatest priority tends to centre on comfort/experience, followed by cost containment/savings and sustainability in that order.

The notable exception is among French business travellers, who rank cost containment/savings higher than comfort and sustainability.
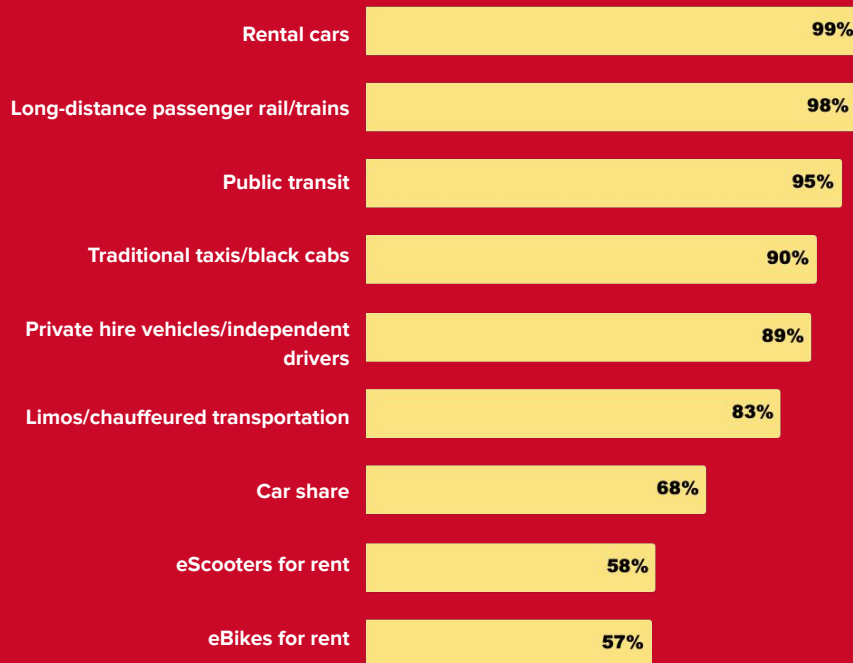
GROUND TRANSPORTATION POLICIES IN MANAGED TRAVEL PROGRAMMES

The Travel Manager's Perspective

Do corporate travel policies address...?

Q. How does your company's travel policy address the following modes of ground transportation on business trips? (n=123-134)

Mode	Percentage
Rental cars	99%
Long-distance passenger rail/trains	98%
Public transit	95%
Traditional taxis/black cabs	90%
Private hire vehicles/independent drivers	89%
Limos/chauffeured transportation	83%
Car share	68%
eScooters for rent	58%
eBikes for rent	57%

Managed business travel programmes in Europe address a host of ground transportation options, with rental cars (99%), long-distance trains (98%), public transport (95%), traditional taxis/black cabs (90%), private hire/independent drivers (89%) and limos/chauffeured transportation (83%) most commonly addressed.

GROUND TRANSPORTATION POLICIES IN MANAGED TRAVEL PROGRAMMES

More travel programmes address "newer" ground transportation options compared to 2020 when GBTA and FREENOW for Business last surveyed European travel managers.

For example, two in three (68%) travel programmes now address carsharing versus 54% who did so in 2020.

eScooters (58% vs. 42% in 2020) and eBikes (57% vs. 44% in 2020) are also now more frequently addressed in European travel programmes compared to three years ago.

Overall, the increasing inclusion of newer transportation options like car-sharing, eScooters, and eBikes in managed business travel programmes reflects the changing landscape of transportation in Europe.

Travel managers are adapting to meet the evolving preferences and needs of business travellers, with a focus on sustainability, cost-efficiency, and convenience.
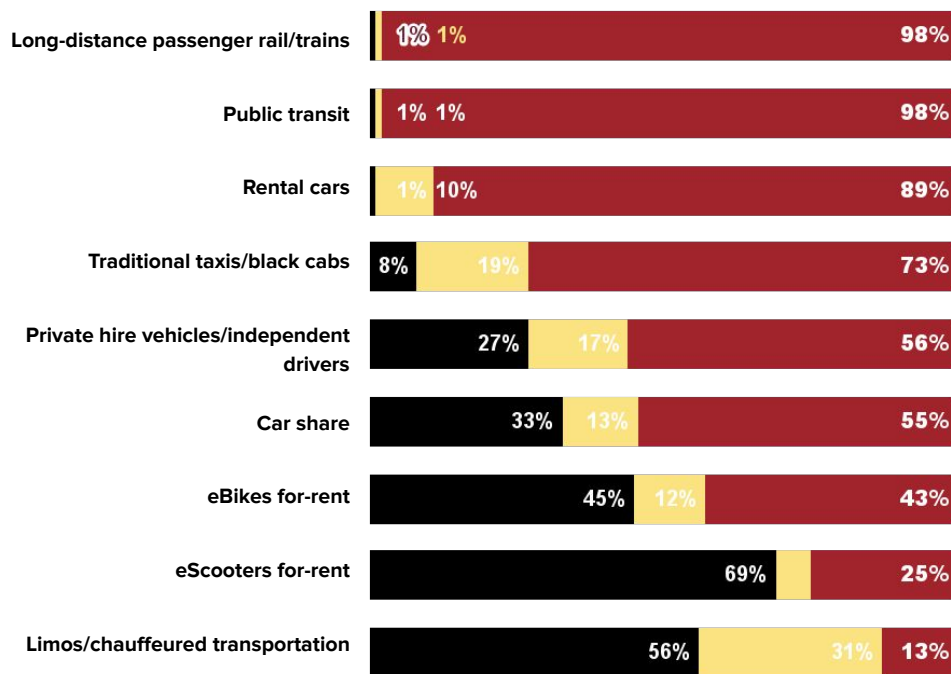
The Travel Manager's Perspective

How do travel policies address specific modes of ground transportation on business trips?

- ■ Never/Rarely allowed
- ▨ Sometimes allowed
- ■ Often/Always allowed

Whilst many travel policies may address various ground transportation modes, they might not necessarily permit them.

Mode	Never/Rarely	Sometimes	Often/Always
Long-distance passenger rail/trains	1%	1%	98%
Public transit	1%	1%	98%
Rental cars	1%	10%	89%
Traditional taxis/black cabs	8%	19%	73%
Private hire vehicles/independent drivers	27%	17%	56%
Car share	33%	13%	55%
eBikes for-rent	45%	12%	43%
eScooters for-rent	69%		25%
Limos/chauffeured transportation	56%	31%	13%

Q. How does your company's travel policy address the following modes of ground transportation on business trips? (n=123-134)

GROUND TRANSPORTATION POLICIES IN MANAGED TRAVEL PROGRAMMES

Travel policies often include guidelines and restrictions to ensure compliance with company rules, safety standards and cost-effectiveness. However, almost all European travel programmes allow their travellers to use long-distance passenger rail (98%) and public transport (98%) – which in part might be due to the growing emphasis on sustainability in the EU and other European countries.

Rental cars (89%) and taxis/black cabs (73%) are largely permitted, as are private hire vehicles/independent vehicles (56%). The 2020 study found half (50%) of managed travel programmes always allowed private hire vehicles (PHV) for their business travellers.

⟫ PERSPECTIVE
THE EVOLUTION OF GROUND TRANSPORT POLICIES

Three years ago, GBTA and FREENOW surveyed corporate travel managers – asking them how their company's travel policy addressed various modes of ground transport before the pandemic. This year's study included the same questions. The goal was to see how travel policies have evolved. Several key trends emerge.

A Clamp-Down On Limos/Chauffeured Transport

Over the past three years, travel policies have clamped down on limos/chauffeured transport. Today, when travel policies address limos/chauffeured transport, fewer than half (44%) at least "sometimes" allow it. This includes fewer than one-third (31%) that "always" or "often" allow it. Before the pandemic, this was a different story. Almost two-thirds of travel policies (65%) at least "sometimes allowed" limos/chauffeured transport including two in five (38%) that "always" or "often" allowed it.

An Evolving Approach To Micro Mobility

A growing number of travel policies address micromobility. Three in five (58%) travel policies address eScooters for-rent. This is up from less than half (45%) three years ago. Similarly, three in five policies (57%) address bicycles-for-rent which is up from less than half (46%) prior to the pandemic.

Of the policies that address eScooters, seven in 10 (69%) "never" or "rarely" allow them. This is similar to the share (75%) that restricted them prior to the pandemic.

However, bicycles have gained greater acceptance. Of the travel policies that address bicycles-for-rent, more than half (55%) at least "sometimes" allow them including two in five (43%) that "always" or "often" allow them. Before the pandemic, fewer than half of travel policies (40%) at least "sometimes" allowed them.

Carsharing Gains Acceptance

The number of travel policies that at least sometimes allow rental cars (89%) is largely consistent from three years ago (94%). However, a growing number of policies allow carsharing. These programmes allow employees to rent a car on an hourly or per-trip basis.

Of the travel policies that address carsharing, two-thirds (68%) at least "sometimes" allow it including more than half (55%) that "always" or "often" allow it. Before the pandemic three in five policies (60%) at least "sometimes" allowed it including fewer than half (40%) that "always" or "often" allowed it.

WHAT TRANSPORTATION MODES DO BUSINESS TRAVELLERS PREFER?

Business travellers are interested in utilising a host of ground transportation modes when traveling for work. They are most interested in using long-distance passenger rail/trains (with over 70% in each market interested) and rental cars while travelling on business (with 64%-81% in each market expressing interest).

However, there are some notable differences, including business travellers in France are less interested in using traditional taxis and limos, while those in Spain are more interested in utilising private hire vehicles and those in Italy are more interested in eScooters...

WHAT TRANSPORTATION MODES DO BUSINESS TRAVELLERS PREFER?

The Business Traveller's Perspective

Please rate your interest in using each of the following modes of ground transportation while travelling for business (n=101-112)

% Interested or very interested in using on work trips

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Long-distance passenger rail/trains	79%	78%	84%	79%	77%	74%	73%
Rental cars	64%	81%	77%	78%	73%	68%	71%
Traditional taxis/black cabs: hailed manually or ordered through a mobile app	61%	69%	74%	79%	71%	67%	70%
Private-hire vehicles/independent drivers ordered through a mobile app	62%	67%	71%	83%	67%	67%	71%
Public transit: buses or Metrorail	68%	74%	76%	64%	64%	58%	72%
Car share: rental cars by-the-hour	53%	65%	59%	48%	70%	59%	54%
Limos/chauffeured transportation	32%	58%	59%	46%	44%	48%	50%
Bicycles for-rent	53%	55%	62%	48%	64%	59%	53%
Electric scooters for-rent	44%	53%	52%	43%	63%	47%	48%

WHAT TRANSPORTATION MODES DO BUSINESS TRAVELLERS PREFER?

The Business Traveller's Perspective

On your last business trip, which of the following modes of ground transportation did you actually use? Please select all that apply. (n=104-112)

% Used on last business trip

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Long-distance passenger rail/trains	48%	53%	37%	45%	45%	33%	31%
Rental cars	45%	49%	35%	43%	47%	47%	35%
Traditional taxis/black cabs: hailed manually or ordered through a mobile app	30%	39%	40%	44%	38%	35%	38%
Private-hire vehicles/independent drivers ordered through a mobile app	28%	30%	39%	50%	43%	29%	32%
Public transit: buses or Metrorail	33%	48%	46%	38%	35%	45%	55%
Car share: rental cars by-the-hour	14%	24%	27%	23%	28%	28%	23%
Limos/chauffeured transportation	4%	16%	10%	9%	10%	13%	16%
Bicycles for-rent	10%	16%	17%	14%	10%	23%	13%
Electric scooters for-rent	13%	21%	18%	10%	9%	13%	14%

Given the growing concerns (and subsequent policies at many European companies) about sustainability, it is noteworthy that European business travellers are largely open to using ground transportation modes that are less polluting, including rail and public transit.

Europe has an extensive and efficient rail network, making it a convenient and eco-friendly alternative to flying for many intra-European routes. High-speed trains offer competitive travel times, making them a viable choice for business travel as well.

The growing interest in micro-mobility options, such as eScooters and eBikes/bikes for-rent, among business travellers reflects a broader trend towards sustainable and flexible transportation choices. Roughly two in five business travellers (and more in some markets) are interested in using eScooters for-rent and more than half are interested in bicycles for-rent when travelling for work.

However, it's important to note that while travellers are increasingly interested in these options, many company policies have yet to catch up with these newer forms of ground transportation.

The use of multiple modes of ground transportation by European business travellers on work trips is common and reflects the need for flexibility and convenience when navigating within a city or region.

Combining various transportation modes can optimise travel time and cost, as well as enhance the overall travel experience. **On average, two-thirds (65%) of European business travellers say they used multiple modes of ground transportation during their last business trip.** This is an increase from the 2020 study, when roughly half of business travellers said they used multiple modes of transportation on their last business trip.

PERSPECTIVE
WILL MOBILITY PLATFORMS
HELP COMPANIES SOLVE
THE 'GROUND PUZZLE'?

EUROPEAN BUSINESS TRAVELLERS USE MULTIPLE MODES OF GROUND TRANSPORT

Two-thirds of Europe-based business travellers (65%) used multiple modes of ground transport on their last work trip. On average, business travellers used 2.6 different modes.

A traveller might take a long-distance train to their destination city, take a taxi to their hotel, and use a bicycle, scooter, or bus to commute to nearby restaurant for dinner. Moreover, no single mode predominates. Of nine modes tested, five were used by at least one-third of business travellers on their last work trip.

THE 'GROUND PUZZLE'

The managed corporate travel industry has devoted significant effort to address 'content fragmentation': the need to book travel—and access travel-related data—using multiple platforms or sources.

Employees can often use the same online booking engines (OBEs) for reservations for hotels *and* home-share reservations (e.g., Airbnb or Vrbo). And increasingly, low-cost air carriers (LCCs) can be booked using OBEs.

However, ground transport remains a significant puzzle as it is often booked across different platforms. The fragmented nature of ground transport poses challenges for employees and companies.

WHAT TRANSPORTATION MODES DO BUSINESS TRAVELLERS PREFER?

THE CHALLENGE FOR EMPLOYEES

Content fragmentation hurts the employee experience. It can be difficult—and time-consuming—to comparison shop.

For instance, let's say an employee needs to commute from a hotel to a business meeting. They decide whether to take a bus, taxi or bicycle. They might need to research prices and availability across multiple websites or apps before making their decision.

If they want to mix modes of transport, they would need to use separate apps - and enter their payment information twice - to purchase the bus ticket and bicycle ride.

Finally, expense reporting can be a challenge. They might need to access multiple apps and manually enter a good amount of expense data.
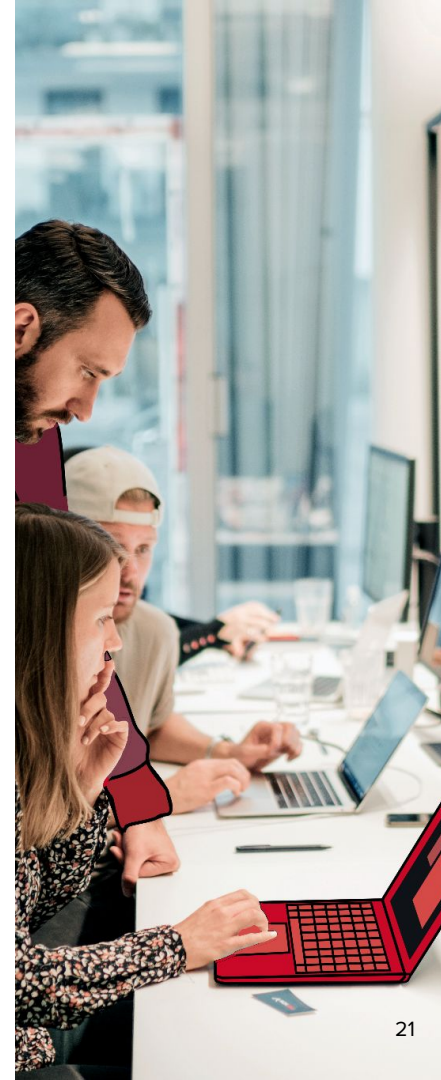
>>> **PERSPECTIVE**
WILL MOBILITY PLATFORMS
HELP COMPANIES SOLVE
THE 'GROUND PUZZLE'?

THE CHALLENGE FOR COMPANIES

Content fragmentation also hurts companies. It makes it difficult to understand the full scope of a company's ground spend. For instance, companies might need to manually combine data from different sources—such as rental car companies and OBEs —to understand the full picture. As a result, they might rely on expense data—as opposed to supplier or booking data, but this data can have omissions and limited detail or granularity. Companies might need to set up (and train employees to use) multiple booking platforms for different types of ground transport. A growing number of mobility platforms allow employees to book different types of ground transport in the same place. These might include traditional taxis, PHVs, rental cars, carshare, scooters, and bicycles.

This could make it easier for employees to compare different options and book multi-mode trips. It can also simplify expense reporting—especially if data automatically imports to expense systems—and allow companies to have a consolidated view of their spend across different modes of ground transportation. Companies might also be able to negotiate with a single provider for multiple types of ground products or services at the same time. This could reduce time spent on negotiations and account reviews. More than half of travel managers (53%) are interested in negotiating with a single provider for multiple types of ground services. Only one in five (21%) are not interested (see p. 41).

GROUND TRANSPORTATION PROGRAMMES: PRIORITIES, STRENGTHS AND PAIN POINTS

The Travel Manager's Perspective

Top Priorities Travel Managers Have for Their Ground Transportation Programme
% included in top 3 (out of 7)

Priority	%
Traveller safety/duty of care	68%
Policy enforcement	51%
Cost savings	50%
Sustainability	44%
Traveller satisfaction	35%
Reporting/spend visibility	26%
Ease of payment/expense management	25%

European travel managers recognise there are multiple priorities for their corporate ground transportation programmes.

Topping the list for travel managers is traveller safety/duty of care (68%), followed by policy enforcement (51%) and cost savings (50%).

Also noteworthy, sustainability (44%) and traveller satisfaction (35%) are ranked higher priorities than reporting/spend visibility (26%) and expense management (25%).

The ranking of priorities reflects the multifaceted nature of managing corporate ground transportation programmes. Travel managers must often strike a balance between ensuring traveller safety, enforcing policies, controlling costs, promoting sustainability and enhancing traveller satisfaction.

Indeed, the relatively lower prioritisation of reporting and expense management may indicate that these areas are already well established or are viewed as tools to support the broader goals of safety, policy enforcement and cost savings.

Q. Thinking about your company's ground transportation programme in general, what are your biggest priorities? Please rank in order of importance with 1=most important and 7=least important. (n=111)

GROUND TRANSPORTATION PROGRAMMES: PRIORITIES, STRENGTHS AND PAIN POINTS

Understanding the priorities of business travellers when selecting ground transportation is essential for travel managers in order to design policies that enhance the overall employee experience during work-related trips.

The priorities identified, including safety, comfort, ease of booking and convenience, provide valuable insights into what matters most to travellers.

It's interesting to note the variations in safety prioritisation among different markets, with Irish and German travellers slightly less likely to emphasise safety.

This may be due to varying perceptions of safety in different regions or differences in the way travellers evaluate and prioritise safety concerns.

**The Business
Traveller's Perspective**

Importance of various priorities when choosing ground transport in business trips.

Q. When choosing ground transportation on business trips, how important are the following priorities? (n=736-740)

% Important + very important

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Safety	91%	84%	91%	91%	90%	91%	86%
Comfort	81%	87%	87%	90%	89%	92%	83%
Ease of booking	81%	88%	78%	79%	92%	90%	87%
Convenience	79%	87%	79%	84%	86%	94%	85%
Ease of payment/expense reporting	74%	86%	80%	88%	86%	88%	81%
Policy compliance	78%	78%	78%	83%	83%	80%	82%
Sustainability	75%	80%	72%	84%	81%	74%	71%
Cost savings for my company	76%	80%	76%	78%	80%	75%	74%

Q. When choosing ground transportation on business trips, how important are the following priorities?.(n=736-740)

The Business Traveller's Perspective

Q. Thinking about recent global events, which of the following has had the biggest impact on your business travel? (n=101-112)

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Increase in costs from rising gas and fuel prices	57%	49%	38%	53%	50%	66%	43%
Company budget cuts & layoffs	23%	24%	35%	18%	24%	15%	31%
Staff shortages, causing lack of, or cancellation of, trips	14%	15%	24%	18%	13%	11%	25%
Other	0%	1%	0%	3%	1%	0%	0%
No external event has impacted our policy	6%	11%	3%	8%	12%	8%	1%

Q. Thinking about recent global events, which of the following has had the biggest impact on your business travel?

GROUND TRANSPORTATION PROGRAMMES: PRIORITIES, STRENGTHS AND PAIN POINTS

Also of note, global events play a role in terms of impacting business travel. For example, business travellers, especially Polish (66%) and French (57%) are more likely to recognise the impact of increasing fuel and petrol prices on business travel compared to travellers in the UK (38%) and Ireland (43%).

However, British (35%) and Irish (31%) business travellers are more likely to attribute company budget cuts and staff reductions, as well as staffing shortages (24% and 25% respectively) as impacting their travel compared to travellers in other markets.

Overall, this data underscores how market factors, as well as economic conditions, can influence how business travellers perceive and respond to challenges related to their travel experiences.

It also highlights the importance of understanding the unique concerns and priorities of travellers in different markets when managing corporate travel programs or devising travel related decisions.
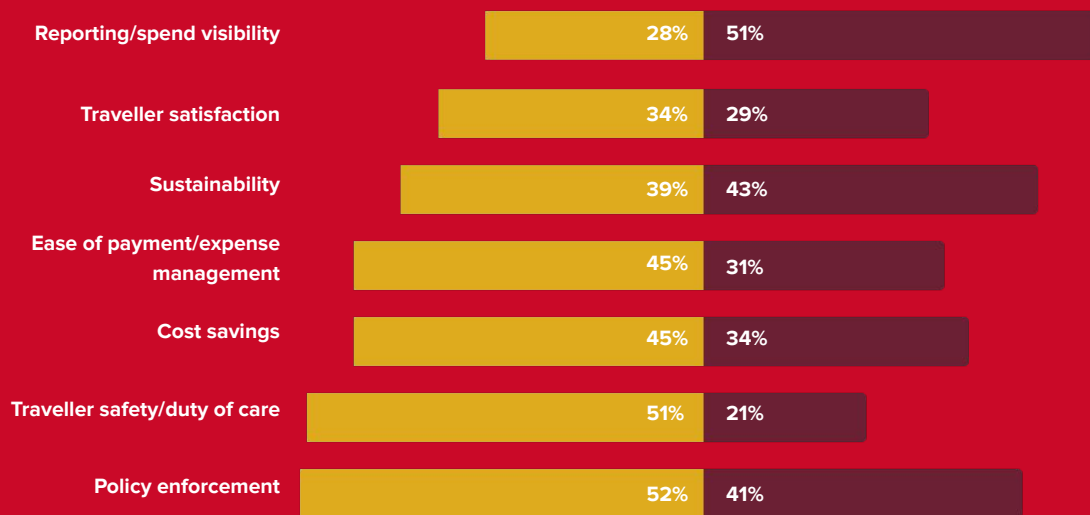
The Travel Manager's Perspective

Ground transport strengths
% included in top 3 (out of 7)

Ground transport pain points
% included in top 3 (out of 7)

	Strengths	Pain points
Reporting/spend visibility	28%	51%
Traveller satisfaction	34%	29%
Sustainability	39%	43%
Ease of payment/expense management	45%	31%
Cost savings	45%	34%
Traveller safety/duty of care	51%	21%
Policy enforcement	52%	41%

Q. Thinking about your company's ground transportation programme in general, what are its three greatest strengths? Please select up to 3. (n=116)

Q. Thinking about your company's ground transportation programme in general, what are the three biggest pain points? Please select up to 3. (n=110)

European travel managers identify several strengths (and pain points) of their ground transportation programme.

Top strengths most commonly include policy enforcement (52%), traveller safety/duty of care (51%), cost savings (45%) and ease of payment/expense management (45%).

However, travel managers also recognize there are challenges or pain points with their programme.

The most frequent top three pain points include traveller satisfaction (57%), reporting/spending visibility (51%) and sustainability (43%). It is noteworthy in the 2020 study, reporting/spending visibility was also a top three pain point, but only four in ten (40%) travel managers cited it as a challenge.

This increase might be simply due to more business travel in 2023 versus 2020 and thus more reporting and spending visibility needs.

GROUND TRANSPORTATION SPENDING

Unlike other business travel spending, ground transportation is split by multiple modes of transport - and the **share of spend is changing.**

When asked to estimate the percentage of company ground transportation spend by category, approximately a third of ground transportation spend is dedicated to **public transport (30%),** with an additional quarter **(27%) going to rental cars.**
Approximately 20% of spend is allocated to traditional taxis and 14% allocated to private hire vehicles.

For comparison, **the 2020 study found** average spending on **public transport accounted for just 16%** of ground transportation spend and **18% was spent on private hire vehicles.**

The shift towards **increased spending on public transport** and the corresponding decrease in spending on rental cars and private hire vehicles suggests increased **sustainability efforts in travel programs.**

This trend may also be influenced by factors such as government policies promoting public transport and a shift in traveller preferences toward more sustainable choices.

When asked to characterise ground transportation spending compared to 2019's spending, half (50%) of European travel managers indicate their company's spending on **long-distance passenger rail/trains and on passenger rail/trains (49%) has increased.** In addition, reported spending is lower compared to 2019's levels on rental cars (29%), traditional taxis (29%) and private hire vehicles (25%), further suggesting a shift towards more sustainable options.

Overall, these findings underscore the growing importance of sustainability in corporate travel programs and reflect a broader commitment to reducing carbon emissions and promoting responsible travel practices within organisations.
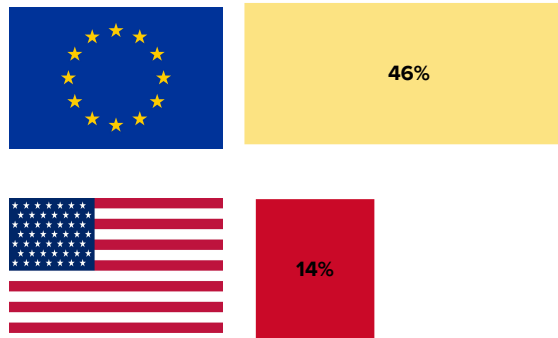
》》》 PERSPECTIVE
FROM PLANES TO TRAINS: SUSTAINABILITY RESHAPES GROUND TRANSPORT IN EUROPE

EUROPE PRIORITISES SUSTAINABILITY
In Europe, sustainability concerns are shaping business travel's future.

A GBTA study released last year sheds light on this dynamic: Two-thirds of Europe-based travel managers (64%) say sustainability is a "major priority" or the "top priority" for their travel programme. This compares to one-third of North America-based travel managers (33%) who say so.

In the same study, almost half of **Europe-based travel managers (46%)** say their company has a carbon emissions reduction target specifically for business travel. These are concrete commitments to reduce business travel emissions by a defined amount (e.g., 50% reduction by 2025 or carbon neutrality by 2030). **Only 14% of North America-based travel managers** say their company has such a commitment.

46%

14%

Sustainability has reshaped how companies approach ground transport on business trips.

Europe-based travel managers were asked how their company's spending on various modes of ground transport compares to the pre-COVID (2019) level. While several modes of transport have seen an uptick in spending, the increase is particularly dramatic for rail. **Half of travel managers (50%) say their company spends more on long-distance rail today than it did before the pandemic.** Only 14% say their company spends less on long-distance rail.

What makes these numbers even more dramatic is that business travel volumes remain down from the pre-COVID level, as shown in the April GBTA Business Travel Outlook Poll, in which Europe-based travel managers estimated their company's domestic business travel bookings were at 65% of the pre-COVID level on average and their international bookings were at 64%.

In all likelihood, European companies are switching to rail for a fairly significant number of business trips for which they would have previously relied on air travel. This transition is expedited by recent laws in some countries that prohibit certain short-haul commercial flights.

〉〉〉 **PERSPECTIVE**
FROM PLANES TO TRAINS: SUSTAINABILITY
RESHAPES GROUND TRANSPORT IN EUROPE

THE RAIL ADVANTAGE

While the carbon footprint of a business trip depends on different variables, rail travel typically has a dramatically lower impact than air travel. A 2019 BBC article provides this example:

The article considers a trip from London to Madrid. A train ride is expected to produce 43 kg of CO_2 emissions, which is about 36% of the emissions typically generated by a flight, according to EcoPassenger.
However, this does not capture the full disparity. Planes also release a large amount of non-CO2 gases - such as nitrous oxide - at high altitudes where it can become easily trapped in the atmosphere and substantially contribute to global warming.

Sources: GBTA, GBTA Business Travel Recovery Poll Results – April 26, 2023. Alexandria, VA: GBTA, 2023. GBTA, The Journey to More Sustainable Corporate Travel and Meetings Management Programs. Alexandria, VA: GBTA, 2023. "'Climate change: Should you fly, drive or take the train?" BBC.com, August 24, 2019. Accessed August 23, 2023. https://www.bbc.com/news/science-environment-49349566

RIDE-HAILING TECHNOLOGY

Ride-hailing apps allow employees to order taxis, private-hire vehicles or other ground transport with a tap of their finger on a mobile phone.

Introduced in 2009, these apps were quickly adopted by consumers worldwide. Yet in the world of managed corporate travel, adoption was slower.

Today, these apps are widely allowed by corporate travel policies - and used by employees - for business trips. However, a decent number of companies still do not have a formal relationship or contract with a ride-hailing company.

>>> PERSPECTIVE
THREE SHADES OF
RIDE-HAILING APPS

In fewer than 15 years, ride-hailing technology has transformed ground transport. Business travellers widely use these apps. In each country surveyed, more than three in five respondents sometimes or often use these apps on business trips. However, there are differences when it comes to the types of ground transport they actually use.

Whilst some apps focus on a particular type of ground transport, others allow employees to book multiple types.

Traditional taxis:
Some ride-hailing apps allow employees to order traditional licenced taxis or black cabs.
These are essentially the same types of taxis that people might hail on the street or at a taxi rank.

PHVs/independent drivers:
Some apps allow employees to order rides with private hire vehicles (PHVs) or independent drivers. Depending on the country, these drivers might have a special licence from the government. However, they are not official taxis or black cabs. Typically, drivers use personal vehicles that are not retrofitted to resemble taxis or black cabs.

Chauffeured cars/premium transport:
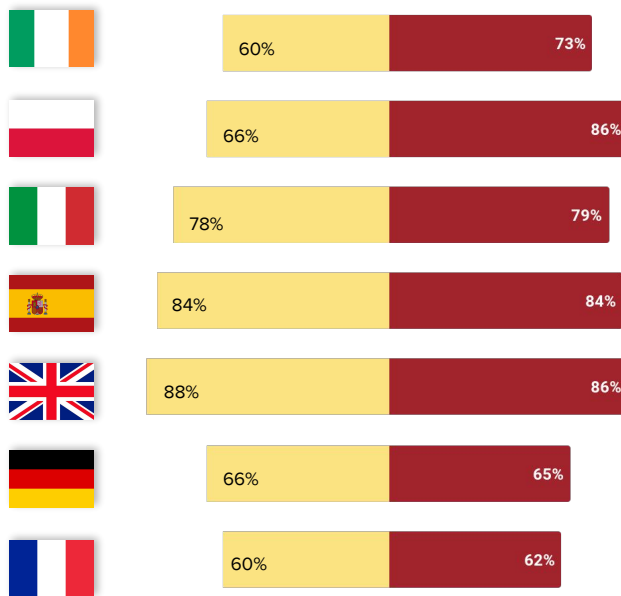Some apps allow employees to order limos/chauffeured transportation.

BUSINESS TRAVELLERS AND RIDE-HAILING APPS

The Business Traveller's Perspective

% of business travellers who "often" or "sometimes" use a ride-hailing app

- 🟨 **Personal Life**
- 🟥 **On work Trips**

Country	Personal Life	On work Trips
Ireland	60%	73%
Poland	66%	86%
Italy	78%	79%
Spain	84%	84%
United Kingdom	88%	86%
Germany	66%	65%
France	60%	62%

Q. In your personal life (when you are not travelling on business), how often do you use a ride-hailing mobile app?.(n=104-112)

Q. When travelling on business trips, how often do you use a ride-hailing mobile app? (n=102-112)

Business travellers widely use ride-hailing apps on work trips.

In each of the seven European countries surveyed, at least three in five business travellers say they "sometimes" or "often" use ride-hailing apps on work trips. The share is higher in the United Kingdom (86%), Poland (86%), and Spain (84%) than it is in Germany (65%) and France (62%).

Moreover, business travellers use these apps with similar frequency on work trips and in their personal lives.

In five of the seven countries surveyed, the share of travellers who at least sometimes use ride-hailing apps on work trips is similar to the share who at least sometimes use them in their personal lives.

BUSINESS TRAVELLERS AND RIDE-HAILING APPS

The two exceptions are Poland and Ireland where business travellers are more likely to use these apps on work trips than in their personal lives.

When compared to the 2020 GBTA-FREENOW survey, the share of business travellers who at least sometimes use ride-hailing apps on work trips…

Increased

- The United Kingdom (86% vs. 69%)
- Germany (65% vs. 58%)
- Poland (86% vs. 78%)

Remained flat

- Spain (84% vs. 87%)
- Ireland (73% vs. 74%)

Decreased

- France (62% vs. 68%)

The Business Traveller's Perspective

Q. How important are the following features of a ride-hailing mobile app? (n=101-111)

% important + very important

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Easy to book	85%	88%	87%	88%	90%	93%	85%
Short wait times/availability of rides	86%	82%	84%	82%	87%	88%	83%
Cost	86%	82%	81%	83%	82%	83%	85%
Automatically billing rides to corporate credit card or central company account	77%	70%	78%	81%	79%	79%	70%
Automatically importing receipts to expense management platform	71%	77%	77%	80%	75%	80%	73%
Different types of services available through same app (e.g., traditional taxis, private-hire vehicles, bicycles, car-share, etc.)	70%	76%	70%	78%	82%	76%	69%
Sustainability (i.e., ability to book electric vehicles or track the carbon emissions of my rides)	77%	72%	70%	72%	76%	77%	67%
Policy enforcement (i.e., only allowing rides at certain times; only requesting rides from drivers that meet their company's safety standards)	67%	70%	71%	74%	73%	75%	72%
Allowing my company to track my whereabouts	49%	54%	70%	68%	74%	59%	70%

BUSINESS TRAVELLERS AND RIDE-HAILING APPS

Business travellers say various features of ride-hailing apps are important. Of nine features tested, eight are rated as "important" or "very important" by at least two-thirds of travellers.

The most important features are ease of booking, short wait times/availability of rides, and cost.

However, business travellers also value features that are only available when their company has a formal relationship or contract with a ride-hailing company. These include automatically importing rides to expense reporting systems and allowing their company to configure the app to enforce travel policies (i.e., only allowing rides at certain times).

European business travellers are increasingly focused on sustainability and cost-effectiveness when using ride-hailing apps for business purposes. They appreciate features that enable them to make environmentally friendly choices, streamline the booking process, minimise wait times and control costs. On the other hand, features related to tracking traveller locations and automating receipt management are of lower importance.

Business travellers also identify their likes and concerns about using ride-hailing apps when travelling for work (see next page).

Topping their list of likes includes "convenience", followed by "price" and "not having to use cash".

Travellers in Poland are more likely to cite convenience as what they like the most about ride-hailing apps, whilst German travellers are less likely to cite price as a key feature. Additionally, the perception of safety associated with ride-hailing services is notable, suggesting the apps are seen as a secure and reliable mode of transportation for business travellers, particularly in comparison to public transportation options.

The Business Traveller's Perspective

Q. What do business travellers like most about using ride-hailing while traveling for business? Please select up to 5. (n=104-112)

% included in top 5 out of 12 possible

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Convenience	44%	56%	48%	49%	48%	62%	51%
Price	48%	39%	48%	48%	49%	50%	47%
Don't have to use cash	32%	39%	32%	49%	37%	40%	41%
Safer than public transportation	33%	33%	39%	45%	36%	39%	36%
The driver knows where I need to go even if I do not speak the language	33%	38%	25%	38%	29%	45%	35%
Receipts provided digitally, making expense reports easier	38%	35%	30%	35%	39%	30%	28%
Increases options for travelling while travelling for work	26%	31%	34%	43%	43%	25%	31%
I can choose eco-friendly vehicles	33%	28%	35%	36%	34%	29%	33%
Can select type of car	26%	29%	30%	34%	30%	33%	28%
My company has a preferred agreement with a ride-hailing app company	38%	30%	29%	28%	22%	14%	24%
Creates jobs	28%	30%	27%	26%	23%	24%	27%
Use it in my personal life so I am used to it	19%	27%	30%	22%	28%	30%	39%

Despite the high comfort levels using ride-hailing whilst on business travel, European travellers also have some concerns.

Safety and cleanliness rise to the top as primary concerns about using ride-hailing for business trips. Notably, business travellers in Spain are more likely to indicate unlicensed/uninsured drivers to be a top concern, along with cleanliness and it not being allowed in their company travel programme.

The Business Traveller's Perspective

Q. What concerns you the most about using ride-hailing for business trips? Please select up to 5 (n=104-112).

(% included in top 5 out of 10 possible)

Despite the high comfort levels using ride-hailing whilst on business travel, European travellers also have some concerns.

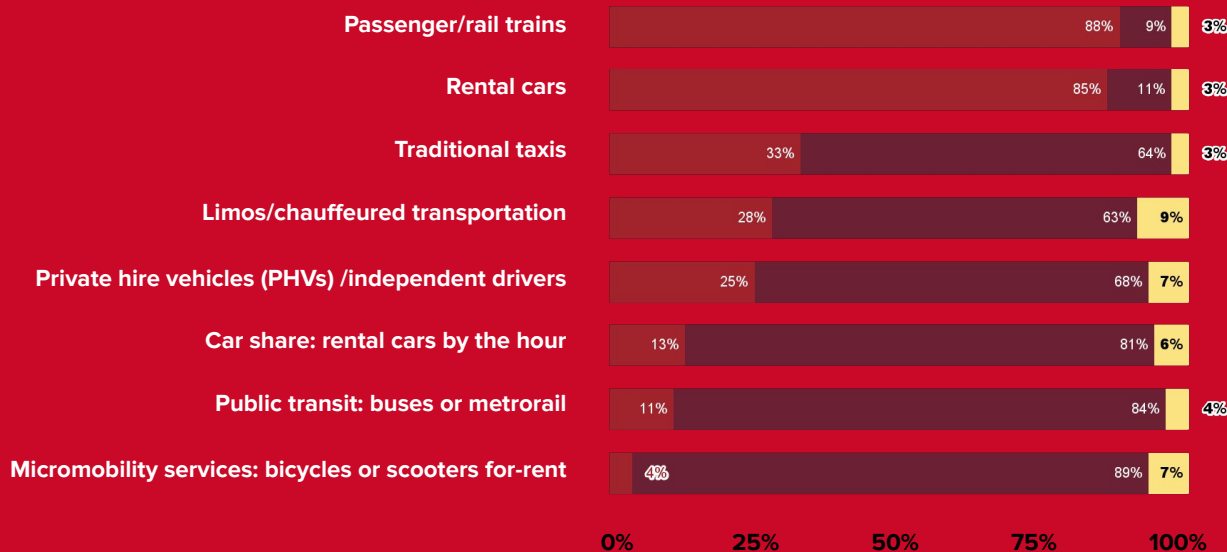|	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Safety	57%	42%	50%	65%	47%	52%	53%
Cleanliness	41%	43%	42%	63%	48%	47%	39%
Increases traffic and congestion, emissions, and vehicles on the road	50%	40%	42%	32%	33%	38%	42%
Unlicenced and/or uninsured drivers	38%	31%	34%	52%	34%	43%	36%
Privacy concerns (GDPR)	37%	38%	37%	44%	37%	37%	32%
Difficult to report driver to the company if there is a problem	34%	32%	39%	30%	36%	31%	33%
Unreliable	34%	29%	29%	44%	36%	31%	33%
Drivers can earn low wages	31%	36%	39%	29%	36%	26%	39%
Discourages use of public transportation	29%	29%	29%	24%	25%	32%	36%
Not allowed in company travel programme	27%	23%	25%	37%	21%	21%	20%

MANAGED RIDE-HAILING

The Travel Manager's Perspective

Do travel programmes offer the ability to pre-arrange ground transportation through an online booking engine?

- ■ Yes
- ■ No
- ■ Not sure

	Yes	No	Not sure
Passenger/rail trains	88%	9%	3%
Rental cars	85%	11%	3%
Traditional taxis	33%	64%	3%
Limos/chauffeured transportation	28%	63%	9%
Private hire vehicles (PHVs) /independent drivers	25%	68%	7%
Car share: rental cars by the hour	13%	81%	6%
Public transit: buses or metrorail	11%	84%	4%
Micromobility services: bicycles or scooters for-rent	4%	89%	7%

0%   25%   50%   75%   100%

Q. Does your travel programme offer the ability to pre-arrange the following types of ground transportation through an online booking engine (OBE)? (n=110-116)

Many travel programmes utilise a host of technological features to help facilitate a seamless experience when organising ground transportation for travellers.

For example, online booking engines (OBE) allow travel managers or employees to pre-arrange ground transportation for ease and convenience.

In fact, six out of seven travel programmes offer the ability to pre-arrange passenger/rail train (88%) and rental car (85%) transportation through an online booking engine.

However, other ground transportation options are less likely able to be booked in advance, including traditional taxis (33%), limos/chauffeured transport (28%), private hire vehicles (25%), car share (13%), public transport (11%) and micro-mobility services (4%).

The use of technology, particularly online booking engines, plays a significant role in facilitating ground transportation for travellers.

However, the availability of pre-booking options varies depending on the type of transportation, with some options being more readily available for advance booking than others.

Travel programmes can also have a formal relationship or contract with a ride-hailing company. This gives them access to detailed reporting or interactive dashboards and allows them to automatically apply travel policies. It can also streamline payment and expense reporting.
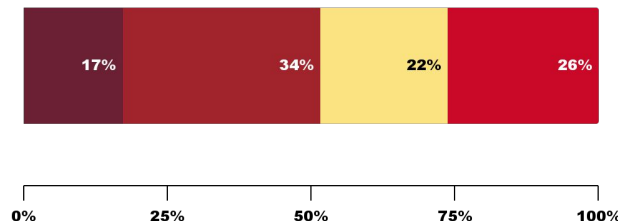
The Travel Manager's Perspective

How likely are travel programmes to begin a formal relationship with a ride-hailing technology company in the next year?

■ Not sure

■ Not likely at all/Not likely

■ Neither likely nor unlikely

■ Likely/Very likely

| 17% | 34% | 22% | 26% |

0%   25%   50%   75%   100%

Q. Please rate the likelihood that your travel programme will begin a formal relationship with a ride-hailing technology company within the next year.
Note: Question only displayed to Travel Managers who indicate their company does not have or they don't know if their company has a formal relationship, contract, or company account with a ride-hailing technology company. (n=58)

Only half of Europe-based travel managers (49%) say their company has a formal relationship or contract with a ride-hailing company. This number is unchanged from the GBTA-FREENOW survey three years ago (50%).

The share of travel programmes that have a formal contract with a ride-hailing company is considerably lower than the share that have one with a rental car company (91%) or passenger train/rail provider (80%), but similar to the share that have one with a limo/chauffeured car company (50%).
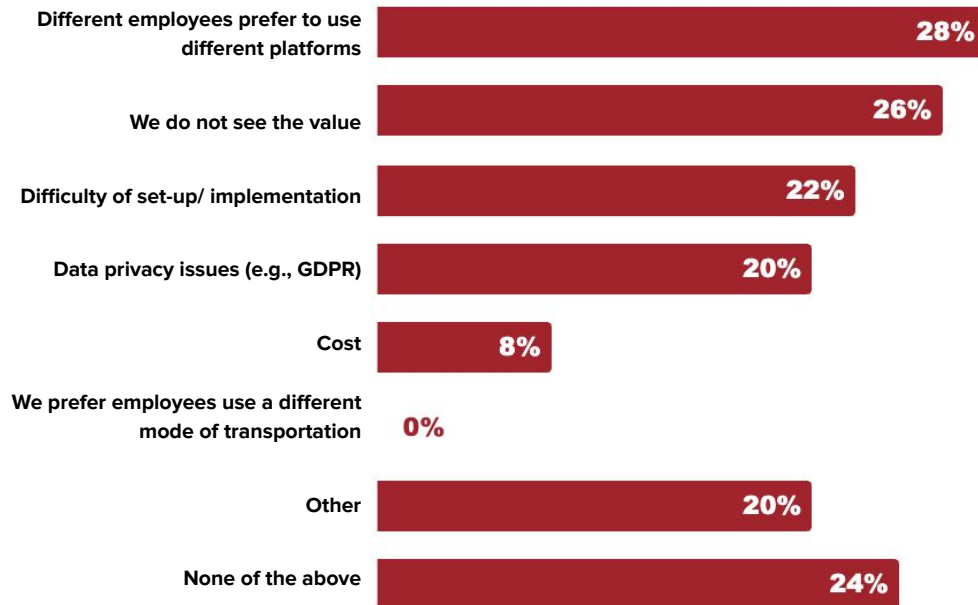
Of the travel programmes that do not have a formal relationship or contract with a ride-hailing company, one-quarter (26%) expect to begin one within the next year.

The Travel Manager's Perspective

Reasons travel programmes do not have a formal relationship with a ride-hailing technology firm (multiple answers allowed)

Reason	%
Different employees prefer to use different platforms	28%
We do not see the value	26%
Difficulty of set-up/ implementation	22%
Data privacy issues (e.g., GDPR)	20%
Cost	8%
We prefer employees use a different mode of transportation	0%
Other	20%
None of the above	24%

Q. You mentioned your company does not have a formal relationship or contract with a ride-hailing technology platform. Which of the following are reasons why? Please select all that apply. **(n=50)**

Whilst half of travel programmes do not have a formal relationship or contract with a ride-hailing company, barriers to adoption vary.

The travel managers who say their company does not have a formal relationship were asked why. Of five barriers tested, four are indicated by at least one in five travel managers. However, no barrier is indicated by more than one-third. The most commonly indicated barrier is that different employees prefer using different ride hailing platforms and companies are reluctant to mandate that they all use the same one.
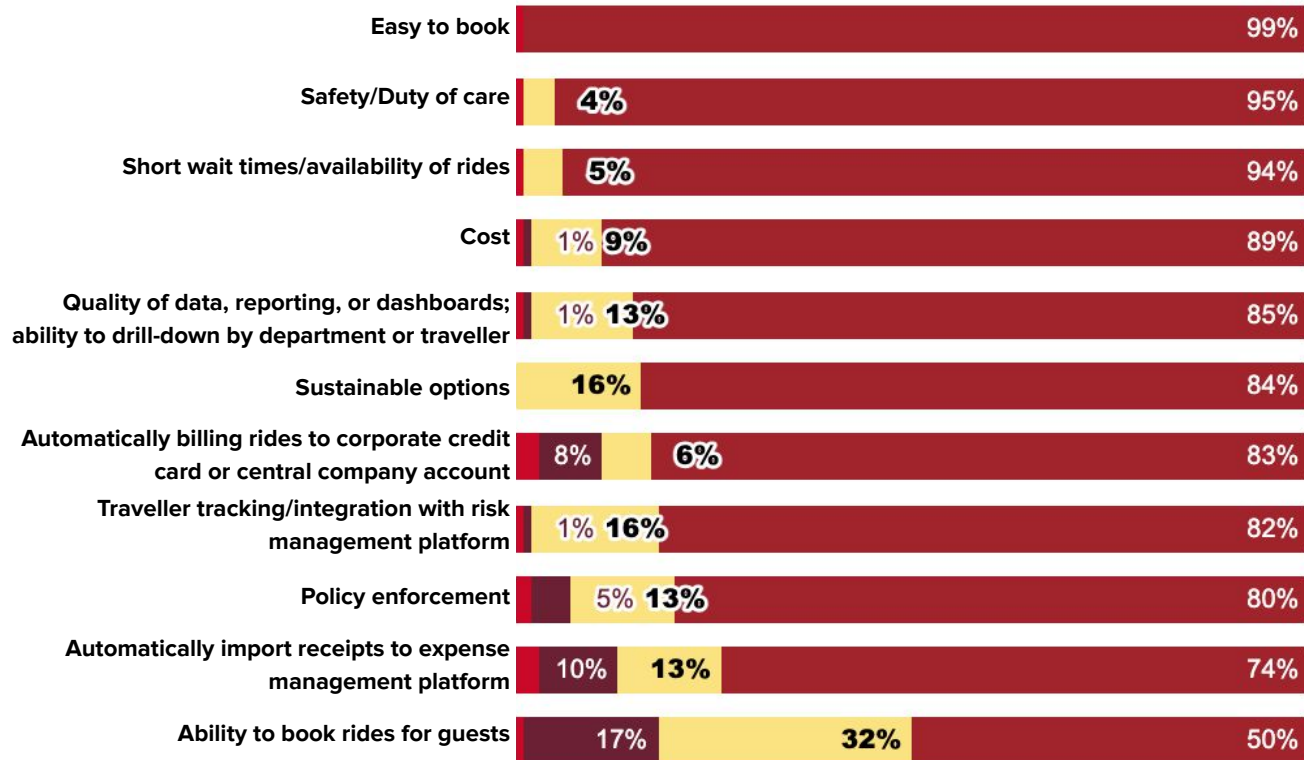
The Travel Manager's Perspective

How important are various features of ride-hailing mobile apps?

- ■ Not sure
- ■ Not important at all/Not important
- ■ Neither important nor unimportant
- ■ Important/Very important

Feature			
Easy to book			99%
Safety/Duty of care	4%		95%
Short wait times/availability of rides	5%		94%
Cost	1%	9%	89%
Quality of data, reporting, or dashboards; ability to drill-down by department or traveller	1%	13%	85%
Sustainable options	16%		84%
Automatically billing rides to corporate credit card or central company account	8%	6%	83%
Traveller tracking/integration with risk management platform	1%	16%	82%
Policy enforcement	5%	13%	80%
Automatically import receipts to expense management platform	10%	13%	74%
Ability to book rides for guests	17%	32%	50%

When choosing a "preferred" ride-hailing partner, travel managers have a number of "important" criteria.

Of 11 criteria tested, nine are rated as "important" or "very important" by at least four in five travel managers. In general, travel managers prioritise general features of the app or service ahead of specific benefits they would realise from a formal relationship.

In other words, whilst travel programmes are looking to realise benefits from a formal relationship— such as improved data, policy enforcement and easier expense reporting—these are less important than other factors such as ease of booking, cost, and availability of rides when choosing a specific provider.

»» PERSPECTIVE: WHAT BUSINESS TRAVELLERS AND MANAGERS WANT

Managed ride-hailing

Business travellers widely use ride-hailing platforms. In each European country surveyed, at least three in five travellers say they sometimes or often use ride-hailing apps on work trips.

However, this does not mean companies "manage" ride-hailing spend. Half of travel managers (49%) say their company has a formal relationship/contract with a ride-hailing technology company. Two in five (43%) say their company does not have a formal relationship and nine percent are not sure if it does. There are several reasons why a company might have a formal contract with a ride-hailing provider.

Business travellers and travel managers were asked to rate the importance of these reasons...

47

Data:
Companies receive reports or dashboard analytics from ride-hailing providers. This can help them monitor policy compliance and identify opportunities for savings. They might be able to drill-down by department or even individual travellers. They can see how much their company is spending on different types of transport such as traditional taxis, PHVs, black cars, eScooters, and eBikes/bicycles for rent.

Almost nine in 10 travel managers (85%) say quality of data, reporting, dashboards is an important feature when thinking about a formal relationship with a ride-hailing technology company.

Streamlined payments/expense reporting:
When companies have a formal relationship with a ride-hailing technology company, they can streamline payment and expense reporting. The company can often choose to pay a single monthly invoice. This can save time and reduce administrative expense from reimbursing employees for rides paid out-of-pocket.

Three-quarters of business travellers say automatically billing rides to a corporate credit card or central company account is an important feature of a ride-hailing platform. An even higher number of travel managers (83%) say this is an important feature.

In addition, companies can often automatically import receipts from ride-hailing software to expense systems, such as SAP Concur and Amadeus Cytric. Roughly three-quarters of business travellers and travel managers rate this feature as important.

Policy configuration:
Companies can configure a ride-hailing platform to apply travel policies. They can set company-wide policies or tailor policies to specific departments or teams.

Four in five travel managers (80%) say policy enforcement is an important feature when thinking about a formal relationship with a ride-hailing technology company.

Surprisingly, business travellers agree. Three-quarters of business travellers say this is an important feature of a ride-hailing app. For business travellers, it might be easier if companies automatically apply policies using technology.

Safety:
A formal relationship can help with risk management.

Travel programs can track rides in real-time using a company dashboard. They can often restrict specific modes of transport such as eScooters, bicycles-for-rent or PHVs. They might also be able to add additional insurance.

Virtually all travel managers (95%) say safety/duty of care is an important feature when thinking about a formal relationship with a ride-hailing platform.

Moreover, while tracking employees can pose data privacy challenges, most employees appear receptive. More than three in five business travellers (63%) say allowing their company to track their whereabouts is an important feature of a ride-hailing app.

》》》 MANAGED GROUND PROGRAMMES AND SUSTAINABILITY

Sustainability at the forefront

Sustainability is a key priority for travel programmes. Travel managers were asked how their company's approach to ground transport has changed since pre-pandemic times (2019). They could only choose one answer. Two in five (38%) say their programme is more focused on sustainability or eco-friendly vehicles. This is higher than the percentage who chose any other answer chosen.

How can companies work with ground partners to achieve sustainability goals?

An effectively managed ground transportation programme makes it easier for companies to achieve their sustainability objectives. There are two primary ways:

Data/reporting

Emissions tracking remains a significant challenge with ground transport.

While three-quarters of Europe-based travel managers (75%) say their company tracks ground emissions from business travel in some capacity, estimates can be fairly imprecise. Only one-quarter (27%) track ground emissions and are confident their estimates are comprehensive and accurate. A larger number (48%) track ground emissions but say their estimates are rough or not comprehensive.

In addition, half of travel managers (50%) say it is more difficult to track emissions from ground transport than other travel categories such as air or hotel.

Ground emissions depends on a number of variables. These include the distance driven, type of car (e.g., gas-powered vs. electric), size of car (e.g., compact vs. intermediate), and even the type of driving (e.g., urban vs. highway).

For instance, a company might know that an employee spent €20 on a taxi but does not know the distance driven or the type of car. As a result, it might come up with imprecise emissions estimates or none at all.

A formal relationship with a ride-hailing company can give businesses access to precise emissions data that accounts for the distance driven, the type of car, and the size of car. Companies can also track how often employees rent electric cars—or use electric taxis—and set goals to increase usage over time.

>>> **MANAGED GROUND PROGRAMMES
AND SUSTAINABILITY**

Influencing traveller behaviour

A managed programme can make it easier to influence behaviour. Companies can encourage employees to use low emission vehicles, or even restrict high-emission vehicles.

Companies can often configure their online booking engine (OBE) to promote low-emission rental cars—displaying these higher in the search results or even blocking out high-emission cars.

If companies have a formal relationship with a ride-hailing company, they might be able to configure the app to restrict high-emission taxis or PHVs.
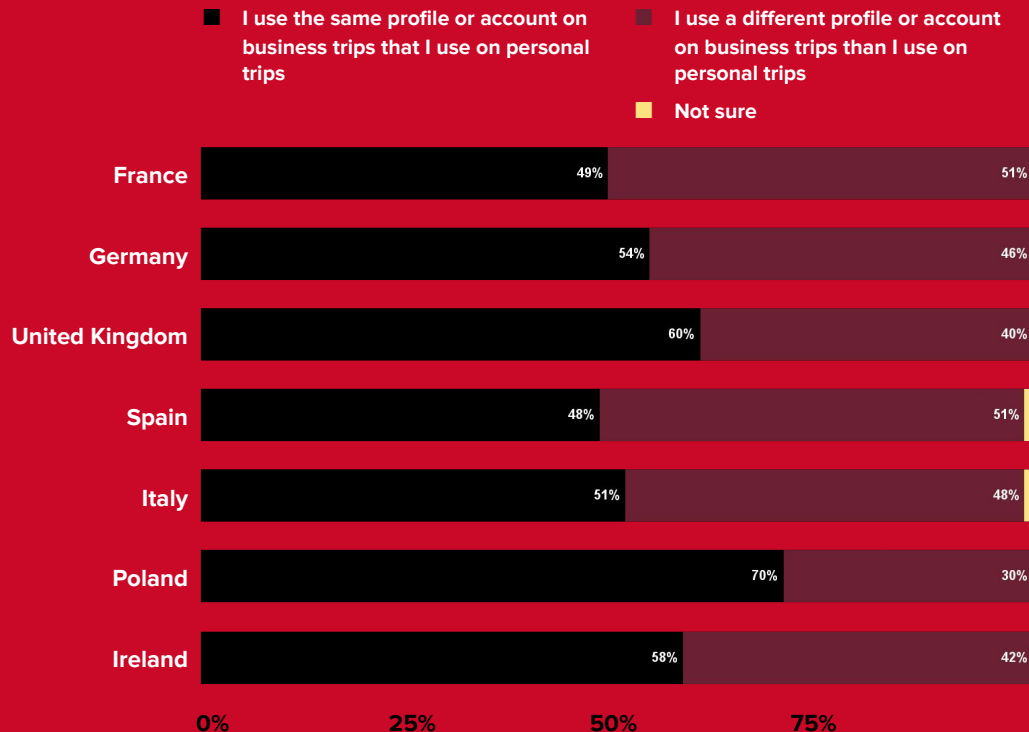
RIDE-HAILING PAYMENT AND EXPENSING

Whilst business travellers widely use ride-hailing apps on business trips, the way in which they use them varies. When their company has a formal relationship or contract with a ride-hailing company, employees can set up a separate 'business-only' profile. This allows them to automatically use separate payment for their business and personal rides - and have receipts for business rides in a separate place.

However, business travellers often do not do this. In six of the seven countries surveyed, a majority of these business travellers use the same ride-hailing profile on work trips that they use in their personal lives – even though their company has a formal relationship or contract with a ride-hailing company. This can make payment and expense reporting more difficult and hurt the quality of data available to travel managers. Travel managers should consider including instructions or tutorials about how to set up a ride-hailing business account in their travel policy or other communications or travel-related trainings.

The Business Traveller's Perspective

Do business travellers use the same or different ride-hailing profile on work trips?

- ■ I use the same profile or account on business trips that I use on personal trips
- ■ I use a different profile or account on business trips than I use on personal trips
- ■ Not sure

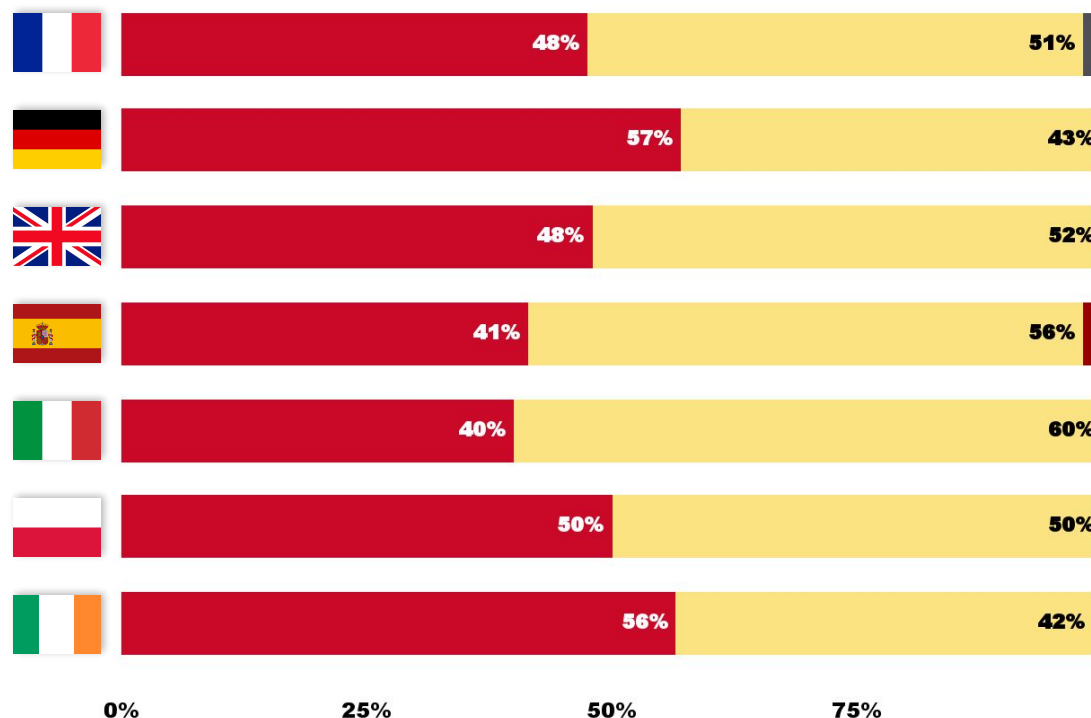| Country	Same	Different
France	49%	51%
Germany	54%	46%
United Kingdom	60%	40%
Spain	48%	51%
Italy	51%	48%
Poland	70%	30%
Ireland	58%	42%

0%   25%   50%   75%

The Business Traveller's Perspective

How do business travellers typically pay for ride-hailing on work trips?

- ■ **I use personal payment (e.g., my own credit card) and receive reimbursement from my company**
- ■ **I use a company-provided payment method (e.g., a corporate credit card or central company account)**
- ■ **Other**
- ■ **Not sure**

Q. Which best describes how you pay for rides ordered through a ride-hailing app on business trips? Note: Question only displayed to respondents who "often" or "sometimes" use ride-hailing on work trips (n=65-96))

Country	Personal payment	Company-provided
France	48%	51%
Germany	57%	43%
UK	48%	52%
Spain	41%	56%
Italy	40%	60%
Poland	50%	50%
Ireland	56%	42%

0%   25%   50%   75%

RIDE-HAILING PAYMENT AND EXPENSING

Business travellers are split when it comes to how they pay for ride-hailing. In each country surveyed, a fairly significant number - ranging from two in five to three in five - say they use personal payment (e.g., their own credit card) and receive reimbursement from their company. One possible reason is their personal credit card might be the default payment method for their ride hailing profile and they do not want to enter a corporate card number and manually switch back-and-forth between payment methods.

Travel managers should consider promoting greater use of corporate payment for ride-hailing. This can save time on expense reports and reduce administrative cost. If companies have a formal relationship with a ride-hailing provider, they can ask about monthly invoicing where the company pays for all employee rides in a single invoice.
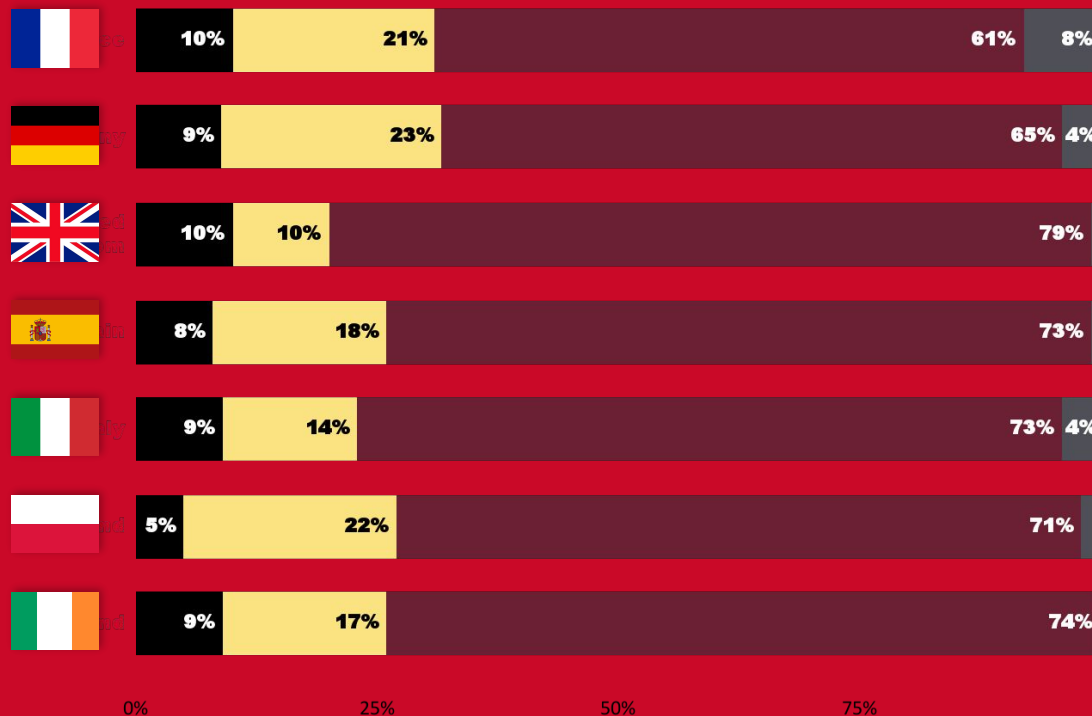
DATA PRIVACY

The Business Traveller's Perspective

Are business travellers interested in allowing their company to collect data about rides they have taken on work trips?

- ■ Not interested/ Not interested at all
- ■ Neither interested nor uninterested
- ■ Interested/Very interested
- ■ Not sure

Country	Not interested	Neither	Interested	Not sure
France	10%	21%	61%	8%
Germany	9%	23%	65%	4%
UK	10%	10%	79%	
Spain	8%	18%	73%	
Italy	9%	14%	73%	4%
Poland	5%	22%	71%	
Ireland	9%	17%	74%	

0%   25%   50%   75%

Q. Please rate your interest in allowing your company to collect data about the trips you have taken using a ride-hailing app on business trips.

DATA PRIVACY

One of the most compelling reasons to have a formal relationship with a ride hailing company is to have better data. In some cases, companies can drill-down to the individual traveller level to see the types of vehicles that travellers use, destinations and the times they travel. This data can help with risk management (i.e., traveller tracking), programme optimisation and policy enforcement. At the same time, it poses privacy concerns.

Travel managers might have access to more data than employees are comfortable sharing and might use it in questionable ways. For instance, a company might ask an employee why they took a work-related ride in the middle of the night. Nonetheless, most business travellers are interested in allowing their company to collect data about the rides they have taken using ride-hailing apps - although willingness is lower in France and Germany than the other European countries surveyed.

Traveller willingness to share data could persuade more companies to work with ride-hailing providers. Of the travel managers who say their company does not currently have a formal relationship or contract with a ride-hailing provider, one-third (33%) would be interested if most of their company's travellers would opt-in to allow collection of data about their rides.

MOBILITY PROVIDERS

The past few years have seen a proliferation of ground options. Employees are confronted with a dizzying number of options for short-distance travel. These include traditional taxis, PHVs, public buses or trains, rental cars, bicycles, carshares, or eScooters – among other options. In many cases, employees rely on different providers. For instance, they might use one app to order taxis and a different app to order PHVs. They might rent cars from one provider and car-shares from another. For travel programmes, this creates complexity. Travel managers might need to negotiate with a number of different suppliers.

In addition, travel programmes often need to deal with fragmented data. For instance, they might have different types of ground data in different places and different formats - and with varying levels of granularity - which can make it difficult to understand programme performance. One trend that has the potential to alleviate this challenge is the rise of mobility providers. A growing number of companies offer multiple types of ground transport. For instance, some companies offer rental cars, car-shares and limos. Other companies offer PHVs/ride-shares, eScooters, and bicycles-for-rent. Travel programmes can negotiate with providers for multiple ground services at the same time.
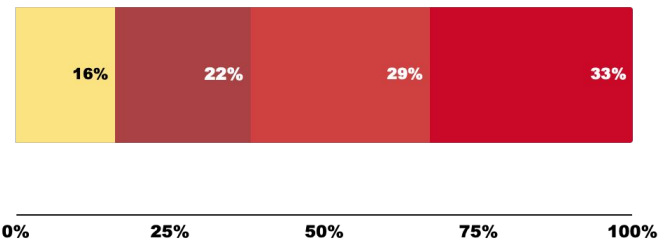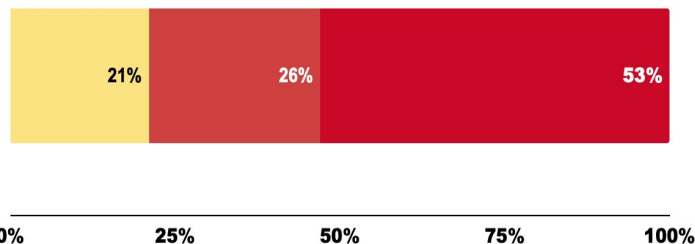
The Travel Manager's Perspective

How interested would **Travel Managers** be in having a formal relationship with a ride-hailing technology platform if most of their travellers were willing to "opt-in" to allowing data collection about their rides?

16%	22%	29%	33%

0%   25%   50%   75%   100%

- Not sure
- Not interested at all or Not interested
- Neither Interested nor uninterested
- Interested/very Interested

Q. If most of your travellers were willing to "opt-in" to allow collection of data about their ground transportation rides, would you be interested in having a formal contract or relationship with a ride-hailing technology platform? Note: Question only displayed to Travel Managers who indicate their company does not have or they don't know if their company has a formal relationship, contract, or company account with a ride hailing technology company. (n=51)

Are **Travel Managers** interested in contracting with the same provider for multiple ground transportation products or services?

21%	26%	53%

0%   25%   50%   75%   100%

- Not interested at all or Not interested
- Neither Interested nor uninterested
- Interested/very Interested

Q. Please rate your interest in contracting with the same provider for multiple ground transportation products or services (e.g. ride-share, taxis, scooters, public transport, fleet, limos, and car-share, among others). (n=105)

Half of travel managers (53%) are interested in contracting with the same provider for multiple ground products or services. One in five (21%) are not interested while one-quarter (26%) are neither interested nor uninterested.

59

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

The Travel Manager's Perspective

Do companies currently track carbon emissions from employee ground transportation on business trips?

We track ground emissions from employee business travel - and our estimates are accurate and comprehensive
27%

We track ground emissions from employee business travel - but our estimates are "rough" or are not comprehensive
48%

We do not track ground emissions from employee business travel
25%

Three in four European travel managers acknowledge the importance of tracking business travel carbon emissions from ground transport. This is a positive sign that emphasis on sustainability is increasing.

However, there are challenges and opportunities for improvement, highlighted by the perception the much tracking data is a "rough" estimate (48%) and the fact that one in four (25%) companies does not track ground emissions from employee business travel, suggesting there is still work to be done in this area.

Q. Does your company currently track carbon emissions from employee ground transportation on business trips? (n=110)

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

While a majority of European travel programmes track emissions generated from ground transportation (in some capacity), corporate approaches to limiting or reducing carbon emissions vary. In fact, half (52%) of travel managers say their organisation pursues both a cost-focused and investment-focused approach to limiting or reducing carbon emissions from business travel.

One in five (21%) travel managers report their company has adopted a cost-focused approach by mandating or encouraging employees to select or use more fuel efficient and/or electric vehicles, whilst an additional one in five (22%) report their company is not meaningfully trying to reduce emissions from employee ground transportation on business trips.

These findings highlight the diversity of approaches that European organisations are taking to address carbon emissions from ground transportation used during business travel. While some are actively pursuing sustainability goals and encouraging more eco-friendly transportation options, others are not prioritising this aspect as much. This suggests that there is room for continued growth in sustainable travel practices across the corporate sector in Europe.

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Rent a smaller car (i.e., compact instead of intermediate)	68%	80%	69%	64%	74%	70%	68%
Take public transit more often	63%	84%	66%	65%	68%	63%	75%
Wait longer for an electric taxi	53%	70%	68%	62%	63%	46%	59%
Use an electric scooter, bike (or other type of electric micor-mobility) instead of taking a taxi	54%	61%	61%	55%	61%	54%	63%
Pay more for an electric taxi or rental car	48%	65%	63%	51%	58%	42%	63%

Are business travellers willing to make sacrifices to reduce carbon emissions of ground transport on work trips?
(% willing + very willing)

Q. Please rate your willingness to do the following to reduce the carbon emissions of your ground transportation on business trips (n=101-112).

**The Business
Traveller's Perspective**

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Use public transit	72%	81%	66%	66%	65%	71%	71%
Take an electric taxi or ride-share	48%	50%	49%	46%	54%	61%	46%
Rent an electric car	42%	50%	46%	38%	50%	49%	43%
Take an electric limo, chauffeured car, or private hire vehicle	31%	42%	44%	30%	31%	39%	48%
Use an electric scooter, bike (or other type of micro-mobility)	34%	38%	38%	29%	42%	43%	34%

Did business travellers take eco-friendly ground transport on their last work trip (% yes)

Q. Thinking about your last business trip, did you...?
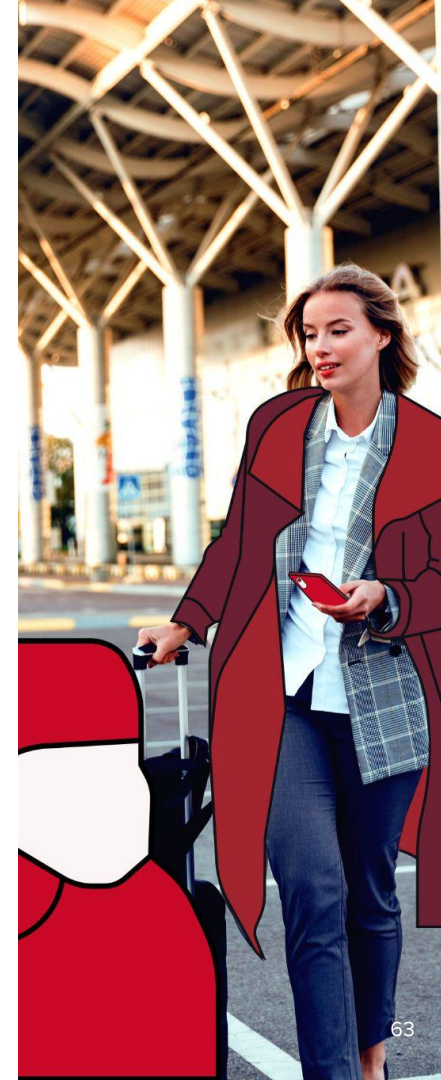(n=101-112)
% = Yes

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

European business travellers themselves are willing to take actions to reduce carbon emissions generated by ground transportation. For example, a majority of business travellers say they would be willing to rent a smaller car or take public transport more often.

Notably, business travellers in Germany express greater willingness to take public transit more often as a means to reduce their carbon emissions. At the same time, those in Germany, Ireland and the UK are more willing to pay extra for an electric taxi or rental car, whilst Polish business travellers tend to be less willing to do the same. Regional variations in these preferences may reflect local infrastructure, cultural attitudes and government incentives related to sustainability. Encouraging and supporting sustainable choices can help further reduce the carbon footprint of business travel in Europe.

In terms of what travellers used on their last business trip, a majority report they used public transportation, followed by taking an electric taxi or rideshare. Fewer European business travellers say they used an electric limo, chauffeured car, electric private hire vehicle, or an electric scooter/bike.

The data suggests public transportation and electric taxis or rideshares are the more popular choices among European business travellers for their last business trips. Overall, travellers exhibit a preference for more sustainable and environmentally friendly transportation options, indicating a growing awareness of the environmental impact of travel choices. Encouraging the use of electric vehicles and public transit can further contribute to reducing carbon emissions from business travel in Europe.

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

Among travellers who did not take public transit or use an electric vehicle or taxi on their last business trip, limited availability (39%) and comfort/convenience (35%) were the top reasons for not using public transit or electric mobility options. In addition, one in four (24%) cited they did not think about using public transit or use an electric vehicle - 14% stated these options were too expensive.

As travel programmes continue to advance, sustainability initiatives and corporate policies to support sustainability goals, travel managers note it is challenging to accurately track emissions from ground transportation versus other travel-related verticals such as hotels and air. In fact, half (50%) of European travel managers say it is more difficult to accurately track emissions from ground transportation than other travel categories (see next page). At the same time, only one-tenth (9%) feel it is easier to accurately track emissions, with an additional two fifths (41%) indicating it is equally easy/difficult. Travel managers do have some insights into electric vehicle bookings made by their travellers. One fifth say 30% or more of rental car (17%) and ride-share/taxi (20%) bookings are electric vehicles.

The Travel Manager's Perspective

Is it easier or more difficult to accurately track emissions from ground transportation than other travel categories?

It is more difficult to accurately track emissions from ground transportation than other travel categories (e.g., air or hotel)
50%

It is easier to accurately track emissions from ground transportation than other travel categories (e.g., air or hotel)
9%

It is equally difficult/easy to accurately track emissions from ground transportation than other travel categories (e.g., air or hotel)
41%

However, a significant number of travel managers are unsure of the percentage of electric vehicle bookings for ridesharing (40%), rental cars (24%) or limos/chauffeured cars (49%) suggesting there is an information gap.

European business travellers are showing a growing interest in using more sustainable ground transportation options, especially given the current economic climate and increasing awareness of environmental concerns. In fact, at least half (if not more) of European business travellers express interest in using sustainable long-distance trains (instead of flying), using public transportation and electric taxi options (see next page).

There is less interest in micro-mobility services (with the exception of Italian travellers) and limo-chauffeured car services for senior staff whilst on business travel. German business travellers are more likely to be interested in most transportation options travellers in other markets.

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

The Business Traveller's Perspective

In current economic climate, how interested are business travellers in …
(% much more interested + somewhat more interested)

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Sustainable electric taxi options	50%	63%	58%	63%	66%	50%	60%
Using public transportation for ground transport	57%	68%	68%	56%	60%	52%	66%
Using ground transportation (e.g. trains or car rentals) instead of flying	64%	70%	64%	68%	64%	53%	65%
Allowing travellers to use micro-mobility services such as bicycles or eScooters for short distances	49%	59%	47%	48%	65%	56%	61%
Offering limo-chauffeured car companies to senior employees	30%	53%	41%	37%	43%	43%	48%

% Interested + very interested in various ground transport-related innovations

Q. The following are innovations that can change ground transportation on business trips. Please rate your interest in each innovation.(n=104-112)

	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
Internet-connected cars/taxis with WI-FI access	66%	73%	79%	79%	74%	73%	77%
Electric cars/taxis	70%	76%	79%	77%	76%	71%	69%
Self-driving cars/taxis	56%	70%	67%	69%	66%	71%	63%
Cars with built-in AI chatbots	54%	69%	65%	65%	66%	53%	65%

SUSTAINABILITY, CARBON REDUCTION AND GROUND TRANSPORTATION

European business travellers are, however, largely satisfied with the number of transport modes offered by their company for business travel.

Two in three (66%) of European business travellers say they are satisfied with the number of modes of transport offered by their company for business travel, while the remaining third (33%) would like their company to provide a variety of ground transportation options and allow travellers to select the option that best meets their needs.

Business travellers are also interested in innovations that could change ground transportation and the traveller experience. Three-fourths of business travellers indicate interest in internet-connected cars/taxis with Wi-Fi access and electric cars/taxis, which are of particularly high interest among travellers in Italy. In addition, self-driving cars and cars with built-in AI chatbots are also of interest.

CONCLUSION

Ground transportation is a critical component of managed travel programmes. In fact, it continues to grow in prominence as today's business travellers have more options than ever when traveling for work. Indeed, ground transportation (in some form) is a component of almost every business trip. As such, travel managers and travellers have multiple needs, expectations and preferences that need to be met.

In addition, ground transport is receiving greater focus as more European travel programmes prioritise sustainability in addition to the more "traditional" review of cost control, policy enforcement, duty of care, traveller satisfaction, risk management and technology.

This study finds there are several actions travel managers can take to address the changing landscape of ground transportation in managed travel programmes.

SUSTAINABILITY

Four in ten (38%) European travel managers reporting their company's approach to ground transportation is more focused on sustainability and eco-friendly vehicles compared to 2019. This suggests that many organizations are actively incorporating sustainability goals into their travel programs. However, many travel managers feel tracking data is just a "rough" estimate (48%) of actual emissions and one in four (25%) companies do not track ground emissions from employee business travel at all, so there's still work to be done in this area. Ground transportation suppliers that recognise the demand for emissions reporting and provide transparent, data-driven insights are likely to attract more business from sustainability-focused managed travel programmes. They can differentiate themselves in the market by offering eco-friendly options and supporting sustainability initiatives.

TRAVELLER PREFERENCES

Business travellers typically have options in terms of what ground transportation they use, but largely prioritise modes that provide the most comfort and savings. However, interest in micro-mobility options, such as eScooters and eBikes/bikes for rent, is strong and reflects a broader trend towards both sustainable and flexible transportation choices.

While European business travellers are increasingly interested in these options, many company policies have yet to catch up with these newer forms of ground transportation. While traditional comfort and cost saving factors remain important, companies should continue to recognise the need to adapt travel policies to accommodate these evolving forms of ground transportation.

TRAVEL POLICY

European travel managers say their company's single greatest priority (as it relates to ground transportation) is cost containment/savings, followed by sustainability and employee experience. In fact, almost all European travel programmes allow their travellers to use long-distance passenger rail and public transport – which could be attributable to growing emphasis on sustainability on the continent. Also typically permitted modes of transportation are rental cars, taxis/black cabs are largely permitted and private hire vehicles/independent vehicles. European travel programs are reflecting the evolving priorities of organisations.

RIDE-HAILING TECHNOLOGY

Business travellers widely use ride-hailing apps on work trips with a similar frequency to their personal lives. App features considered most important include ease of booking, short wait times/availability of rides and cost. However, business travellers also value features only available when their company has a formal relationship or contract with a ride-hailing company such as automatically importing rides to expense reporting systems and allowing their company to configure the app to enforce travel policies. There are many benefits for companies to having a formal relationship with a rideshare provider, particularly for key app features that are perceived as being helpful to travellers which in turn can help boost employee satisfaction.

Methodology
Online survey of travel managers and business travellers in the United Kingdom, Ireland, Germany, France, Spain, Italy or Poland

Travel Manager Survey
Data collection took place between June 29 - July 31, 2023.
Email invitation sent to 2,357 GBTA active and inactive European travel buyers in the UK, Ireland, France, Germany, Spain, Italy and Poland
Of these, 202 completed at least one question.
Of those who qualified, 105 completed the entire survey, yielding a response rate of 4.5%.

Business Traveller Survey
Data collection took place between July 5-18, 2023.
To qualify, respondents had to:
Be at least 18 years old or older.
Live in the United Kingdom, Ireland, Germany, France, Spain, Italy or Poland
Be employed full- or part-time.
Had to have taken at least one business trip in the past 12 months that was at least 30 kms from their home
Quotas were used to ensure a balanced distribution of age, gender, and country.
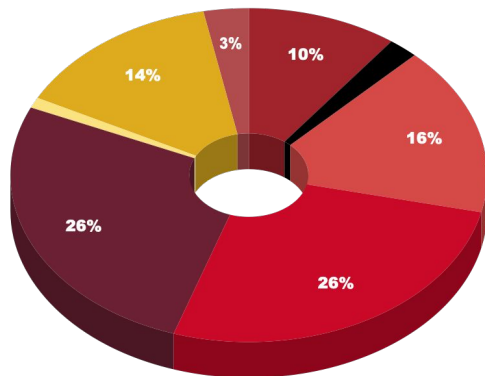740 surveys completed

TRAVEL MANAGER PROFILE

The Travel Manager

In Which of the following countries are you based? (n=202)

- Spain
- Ireland
- Germany
- France
- United Kingdom
- Poland
- Italy
- Other

Pie chart values: 10%, 16%, 26%, 26%, 14%, 3%

Please rate your involvement when it comes to managing or overseeing ground transportation policies, processes, or vendors at your company. (n=189)

| 9% | 10% | 26% | 55% |

0%   100%

- Very involved
- Somewhat involved
- A little involved
- Not involved at all

The Travel Manager

Approximately what was your company's total travel spend in 2022 in [Euros/Pounds/Zloty] (including air, hotel, car rentals, meetings, etc.)? Please use your best estimate. (n=105)
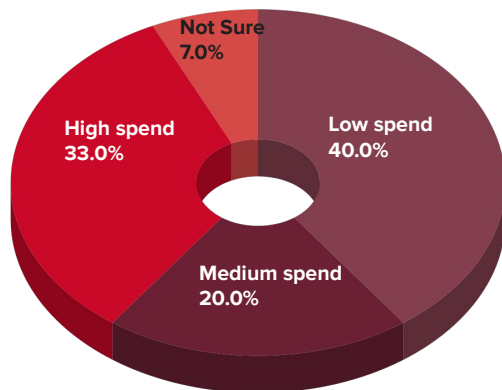
Not Sure
7.0%

High spend
33.0%

Low spend
40.0%

Medium spend
20.0%

Which of the following best describes your organization? (n=106)

■ Nonprofit
8.0%

□ Government
3.0%

For-profit
90.0%

The Travel Manager

How would you define your company's reach? (n=105)

■ **Global (presence in all regions of the world)**
■ **Multinational (presence in multiple countries, do not represent all regions of the world)**
■ **National (presence in only one country)**

7%
30%
64%

Which of the following industries best describes your organisation? (n=104)

Industry	%
Software, Hardware, and Technology	13%
Manufacturing	12%
Finance & Insurance	10%
Professional, Scientific, Consulting, and Technical	10%
Health Care, Pharmaceuticals, and Social Assistance	8%
Retail/Wholesale Trade	7%
Mining, Oil and Gas Extraction and Utilities	6%
Media, Information and Communications	5%
Arts, Entertainment and Recreation	3%
Accommodation and Food Services	3%
Non-profit, Association and Foundation	2%
Travel and Meetings Management	2%
Public Administration	2%
Other services	20%

0   0.05   0.1   0.15   0.2

BUSINESS TRAVELLER RESPONDENT PROFILE

The Business Traveller	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
GENDER							
Male	53%	63%	43%	61%	50%	53%	51%
Female	47%	36%	57%	39%	47%	46%	45%
Non-binary/other/diverse	0%	1%	0%	0%	4%	1%	4%
AGE							
18 to 34	31%	38%	55%	30%	36%	52%	47%
35 to 54	48%	47%	39%	55%	45%	44%	47%
55+	21%	16%	5%	14%	19%	3%	5%
NUMBER OF BUSINESS TRIPS OF AT LEAST 30 KILOMETRES TAKEN IN THE PAST YEAR							
1 to 2 trips	37%	35%	29%	26%	19%	32%	33%
3 to 5 trips	26%	32%	34%	32%	39%	26%	26%
6 or more trips	37%	33%	37%	43%	42%	41%	41%

The Business Traveller	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
WHICH BEST DESCRIBES COMPANY TRAVEL POLICY?							
I must follow my company's travel policies	61%	54%	59%	63%	54%	51%	61%
I am encouraged to follow general guidelines	25%	29%	32%	21%	30%	35%	31%
I have no restrictions or company guidelines to follow	15%	17%	9%	15%	16%	14%	8%
DOES COMPANY USE A TMC FOR ANY PRODUCT OR SERVICE?							
Yes	68%	77%	84%	79%	82%	80%	76%
No	23%	15%	8%	15%	10%	9%	14%
Not sure	8%	8%	7%	6%	9%	12%	10%
DOES COMPANY USE A CORPORATE ONLINE BOOKING TOOL (OBE)?							
Yes	91%	92%	90%	79%	90%	86%	90%
No	7%	8%	9%	10%	10%	11%	7%
Not sure	2%	1%	1%	10%	1%	4%	4%

The Business Traveller	FRANCE	GERMANY	UK	SPAIN	ITALY	POLAND	IRELAND
POSITION TYPE							
Administrative/Support Staff	10%	12%	19%	13%	20%	29%	24%
Middle Management	51%	59%	45%	37%	47%	44%	57%
Upper Management	36%	19%	25%	35%	25%	21%	14%
C-level	3%	10%	11%	14%	9%	6%	5%
NUMBER OF EMPLOYEE AT ORGANIZATION							
500 or fewer	41%	36%	32%	42%	50%	53%	38%
501 to 1,000	17%	17%	21%	23%	19%	28%	19%
More than 1,000	42%	44%	47%	32%	31%	20%	40%
Not sure	0%	3%	0%	3%	0%	0%	2%
TYPE OF BUSINESS TRAVEL DESTINATIONS IN PAST TWO YEARS							
Domestic destinations only	38%	21%	19%	30%	27%	45%	31%
International destinations only	21%	18%	23%	13%	14%	17%	26%
Both domestic and international destinations	40%	61%	58%	56%	59%	38%	43%

ABOUT GBTA

The Global Business Travel Association (GBTA) is the world's largest business travel and meetings trade organization headquartered in the Washington, D.C. area with members on six continents, who manage more than $345 billion of global business travel and meetings expenditures annually. GBTA delivers worldclass 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 www.gbta.org.

FREENOW V

FOR BUSINESS

FREENOW for Business is a leading provider of business travel, employee mobility benefits and client travel solutions for companies. With the backing of BMW Group and Mercedes-Benz Group AG, FREENOW for Business have established a prominent presence in 9 countries and over 150 cities across Europe. FREENOW's comprehensive multi-mobility platform is designed to prioritise the needs of employees, clients and the environment, offering a range of sustainable travel options.

FREENOW's intuitive desktop Admin Panel seamlessly integrates with the user-friendly FREENOW app, streamlining administrative tasks and reducing costs. It's no wonder that more than 30,000 companies have selected FREENOW for Business as their top choice for mobility solutions. For more information, visit FREENOW for Business.

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