



GBTA BUSINESS TRAVELER SENTIMENT INDEX™

Global Report – June 2016

In partnership with American Express

KEY HIGHLIGHTS

- Across the globe, companies are adopting travel policies that allow employees to use car-sharing or home-sharing services when they travel for work. However, more than one in five business travellers aren't sure if their employers allow such options.
- Mobile devices, apps and social networks are becoming relied-upon business travel tools, with Millennials leading the way. Of all business travellers, 64% use a mobile device to check their itinerary at least once a day and 50% check social media for work purposes that often or more.
- When they're in the air, slightly more than half of business travellers want to take a break from work (51%), while the rest prefer to work either online (31%) or offline (18%).
- Composite GBTA Business Traveler Sentiment Index™ component scores improved in 2016 from last year for business travellers from Mexico, Germany and the United States, declined for Canadian travellers, and remained approximately the same for travellers from Australia, Japan and the United Kingdom.

SUMMARY

Companies across the globe are broadening options for business travellers to help make their time on the road more productive and satisfying. In particular, some travellers' transportation and hospitality options are increasing to include sharing-economy options, according to the GBTA Business Traveler Sentiment Index™ Global Report - June 2016, in partnership with American Express. Some companies are allowing employees to book alternatives to traditional transportation and lodging, with 44% of business travellers noting their employer's travel policies allow ride-sharing services such as Uber and Lyft, and 28% saying they can use home-sharing services such as Airbnb and HomeAway. However, such services are still so new that more than one in five travellers aren't sure if the options are covered by their company's policies.

Mobile devices and social media also are becoming relied-upon business travel tools, with a majority of business travellers using smartphones and apps to keep track of itineraries and stay up to speed on expenses when on the road for work, according to the survey. Compared to last year, more employees agree that using social media helps their ability to connect with work contacts, colleagues and friends when on the road and Millennials and employees of mid-sized businesses (those with 100 to 999 employees) lead the way.

When travellers have down time on plane flights, they're almost evenly divided on how they like to spend it. Slightly more than half (51%) prefer to take a break from business, and the remainder either want to do internet-based work (31%) or work offline (18%). Business travellers who want to work during flights cite lack of in-seat power outlets and USB outlets as some of the obstacles to accomplishing that goal.

Composite GBTA Business Traveler Sentiment Index™ component scores for business travellers from Mexico, Germany and the United States improved in the first part of 2016, compared to 2015. The Index scores, which are based on a variety of business travel-related factors, declined in 2016 compared to 2015 for Canadian business travellers and remained approximately the same for travellers from Australia, Japan and the United Kingdom. Because Hong Kong appears in the Index for the first time, component ratings are benchmarked against the composite average of all countries for the year.

Fig. 1 - GBTA Business Traveler Sentiment Index™ Global Report – June 2016 Overall Scores

	2015	2016
Australia	101.4	102.2
Canada	98.8	89.6
Germany	97.3	102.2
Hong Kong*	100.0	93.5
Japan	93.0	91.5
Mexico	106.3	109.7
United Kingdom	101.4	100.5
United States	98.2	105.6

*Benchmarked against composite average of all countries

BACKGROUND AND METHODOLOGY

The GBTA Business Traveler Sentiment Index™ Global Report, in partnership with American Express, aims to understand how business travellers feel about their travel experiences and how those feelings affect their travel behaviours. The results of this edition, or wave, of the research are based on an online survey conducted by the GBTA Foundation from March 31 to April 13, 2016. The survey polled 3,500 part-time or full-time employees in Australia, Canada, Germany, Hong Kong, Japan, Mexico, the United Kingdom and the United States who travelled for business at least four times in the previous 12 months.

The GBTA Business Traveler Sentiment Index™ consists of seven key components of the business travel experience: Overall trip experience and travel friction; expense tracking and management; travel management policy friction; business travel safety; corporate/macroeconomic environment; technology for business travel; and social media experience. Each component is tracked to see how it changes over time and a new value is calculated based on the percentage change. The June 2016 report is the fifth wave of this research, which was first conducted in Q1 2015 against an index of 100 in each category.



KEY FINDINGS

Travellers Remain Satisfied With Overall Work Trip Experience

Most business travellers remain upbeat about work trips. A total of 73% are satisfied with their overall business travel experience over the past three months, compared with 71% in 2015. In addition, 77% say they are able to meet business goals on work trips, about on par with 75% who felt that way in 2015. Overall business traveller satisfaction is highly correlated with their satisfaction with meeting business goals for a trip. Respondents who aren't satisfied or feel neither satisfied nor dissatisfied with meeting business goals for trips, feel the following would have helped: improved Wi-Fi access (46%), clearer objectives (42%), more time with clients (40%), and a larger budget so the trip could be extended (37%).

Fig. 2 - Overall Trip Experience and Travel Friction Component

	2015	2016
Australia	103.1	102.6
Canada	93.3	82.9
Germany	97.0	101.6
Hong Kong*	100.0	93.9
Japan	93.6	92.0
Mexico	103.3	103.9
United Kingdom	102.2	104.5
United States	100.1	105.2

*Benchmarked against composite average of all countries

During the previous three months, business travellers averaged four work trips, including eight total nights in a hotel, two flights and one international trip. Though 42% would travel more for business if they could, more than seven in 10 expected little or no change to their work trips in the following quarter, including domestic trips (73%), international trips (72%), hotel stays (71%), or work-related plane flights (72%).

Fig. 3 - Satisfaction with Elements of Travel

	2015	2016
Stay at hotels	72%	75%
Overall travel experience	71%	73%
Making your own travel arrangements	70%	73%
Travelling on an airplane	64%	69%
Renting a car	61%	62%
Riding on a train	54%	56%
Taking a taxi, private chauffeured car, Uber, or Lyft	59%	62%
Getting through airport security	49%	54%

Travellers continue to be more satisfied with hotel stays than any other aspect of business trips, 75%, compared to 72% in 2015. They are least satisfied with getting through airport security, though those attitudes improved from a year ago, 54% v. 49%.

Slightly more than half of business travellers (51%) prefer to spend plane flights reading, watching a movie or doing something other than work. The number is even higher for business travellers in Japan (61%) and Australia (60%), and for Boomers (those ages 55 and older, 57%).

Employees who want to work during flights say lack of in-seat power outlets is the biggest hindrance to inflight productivity. Seventy-two per cent say too few outlets contribute to at least some to their inability to get work done, followed by seat size (68%), tray table size (67%), and lack of adequate USB outlets (65%). Regions with the largest portions of business travellers who want to work online during flights include Mexico (48%) and Hong Kong (40%).

Electronic Receipts Surpass Hard Copies

More business travellers submit expense receipts in some electronic form (54%) than on hard copies (45%) or something else (1%), which could help explain why 65% report being satisfied with their ability to keep track of receipts, compared to 59% in 2015. Travellers who submit expenses electronically do so as electronic receipts (22%), scanned images (19%) or smartphone photos (13%). In addition, close to half (44%) of business travellers said they used a mobile device to access their expenses once or more a day during work trips.

Submitting receipts electronically contributes most to travellers' satisfaction with expense reporting (60%), followed by using expense management software and companion mobile apps (44% and 31% respectively), having reports pre-populated with commonly-entered data (33%), and using expense management software integrated with their travel folio (26%).

Although a majority of business travellers are satisfied with expense reporting, some see room for improvement. When asked about the most frustrating part of work trips, 17% of business travellers cited the expense reporting process, behind only lack of access to reliable Wi-Fi (25%) and getting from one place to another (19%).

Business travellers prefer paying for trip-related expenses with a corporate card (42%) more so than with a personal card (31%), a mobile wallet linked to their corporate card (12%), a mobile wallet tied to a personal card (7%), cash (8%) or something else (1%).

The Index's Expense Tracking and Management Component, which tracks business travellers' satisfaction with expense reporting methods among other things, improved in 2016 compared to 2015 in Australia, Germany, Mexico and the United States, stayed relatively the same in the United Kingdom, and dropped either slightly or a significant amount in Japan and Canada.

Fig. 4 - Expense Tracking and Management Component

	2015	2016
Australia	99.8	101.8
Canada	100.4	92.4
Germany	98.4	104.0
Hong Kong*	100.0	92.2
Japan	95.4	94.3
Mexico	103.6	112.1
United Kingdom	102.9	102.6
United States	97.5	104.6

*Benchmarked against composite average of all countries





Some Travel Policies Open to Ride and Home-Sharing Services

In 2016, fewer business travellers report being required to follow a company travel policy, 44% compared to 50% in 2015. Another 21% don't have any travel policy restrictions v. 15% last year. Looser requirements could help explain why six in ten business travellers say they are satisfied with their company's travel policies, compared to 54% in 2015. A majority of travellers who are required to follow a travel policy or guidelines are satisfied with ease of understanding travel policies (61%), flexibility in planning trips (60%), and changing their itinerary as needed (58%).

While on the road for work, some business travellers are using new travel services such as ride sharing and home sharing. Forty-four per cent say their company's travel policies allow for ride-sharing services such as Uber and Lyft and 28% can use home-sharing services such as Airbnb or HomeAway. However, the options are so new that more than one in five don't know if their employer's travel policies allow ride-sharing or home-sharing services (22% and 23%, respectively). Millennials are more likely than business travellers of other age groups to have used ride or home-sharing services on work trips they'd taken in the previous three months.

Companies in some countries are more open to sharing economy options than others, with 79% of business travellers in Mexico and 61% in the United States able to use Uber and other ride-sharing services, and 39% of Hong Kong-based business travellers free to use home-sharing services.

Travel Management Policy Friction Component scores improved or stayed the same in Australia, Germany, Mexico, the United Kingdom, and the United States and declined in Canada and Japan.

Fig. 5 - Travel Management Policy Friction Component

	2015	2016
Australia	100.9	101.2
Canada	100.8	96.4
Germany	96.2	99.9
Hong Kong*	100.0	93.7
Japan	93.0	88.6
Mexico	106.9	113.5
United Kingdom	99.6	99.8
United States	100.3	105.3

*Benchmarked against composite average of all countries

Travellers Feel Slightly Safer than Last Year

In most countries, business travellers feel slightly safer on work trips than they did a year ago, with the majority agreeing that business travel is generally safe, their company cares about their well being when they travel for work, and that travel suppliers and travel security officials do a good job of ensuring their safety.

Almost three in five (58%) business travellers always feel safe when they travel, especially travellers from Mexico (75%), Australia (66%) and Canada (65%). More men than women feel safe on work trips, 60% v. 55%, respectively.

Fifty-four per cent of business travellers feel travel security officials do an excellent job of ensuring their safety during work trips, compared to 50% in 2015. Likewise, 58% feel airlines and other travel suppliers look out for their safety during work trips, compared with 55% in 2015.

The Traveller Safety Component of the Index improved or stayed approximately the same over the past year for Australia, Germany, Mexico, the United Kingdom, and the United States, and declined in Canada and Japan.

Fig. 6 - Business Traveller Safety Component

	2015	2016
Australia	103.4	104.0
Canada	100.0	94.7
Germany	100.6	101.8
Hong Kong*	100.0	92.4
Japan	87.7	85.6
Mexico	107.3	111.5
United Kingdom	101.0	99.9
United States	98.2	103.7

*Benchmarked against composite average of all countries



Confidence in Employers Outweighs Faith in Economy

Business travellers aren't immune to concerns about the economy. Employees who travel for work remain most confident about their own employer, with 57% agreeing the company they work for is in excellent financial shape, on par with 2015 attitudes (57%). In addition, 51% feel the overall health of the industry they work in is excellent, v. 49% in 2015. Thirty-five per cent agree the overall health of the economy is excellent, slightly more than last year (33%).

Business travellers at mid-sized companies (those with 100 to 999 employees) have brighter outlooks than travellers at larger or smaller companies, with 61% believing their company is in excellent financial shape, 55% confident in the health of their industry, and 43% saying the overall economy is in excellent health. Millennials are also more optimistic than most, with 55% agreeing that the health of their industry is in good shape, and 42% saying the overall health of the economy is excellent.

In terms of the importance of business travel, 62% of travellers agree their management feels business travel is very important for their company's overall financial performance. The portion who shares that sentiment is highest among business travellers from Mexico (82%) and the United States (73%).

Feelings about the economy are demonstrated in the Corporate/Macroeconomic Environment Component of the Index, which shows significantly lower scores for Canada, Japan, and the United Kingdom, along with unchanged or higher scores for Australia, Germany, Mexico, and the United States.

Fig. 7 - Corporate/Macroeconomic Environment Component

	2015	2016
Australia	99.2	98.5
Canada	97.9	94.8
Germany	100.9	100.7
Hong Kong*	100.0	97.9
Japan	94.7	88.9
Mexico	110.4	117.7
United Kingdom	102.4	96.3
United States	94.4	98.3

*Benchmarked against composite average of all countries



Technology Remains Key to Productivity

Seventy-three per cent of business travellers are provided with a laptop for work trips and 66% get company-issued smartphones when they travel. Fewer travellers report getting tablets (35%), feature phones (13%), nothing (5%) or something else (2%). Japanese companies lag behind businesses in other parts of the world for the technology they provide employees who travel. While 61% of Japanese business travellers get laptops for trips, only 45% have company-issued smartphones, 24% have feature phones, and 11% receive no electronic devices for work trips. At the other end of the spectrum, 82% of Mexican business travellers report getting smartphones for work trips, the highest of any country surveyed.

Wi-Fi remains a linchpin of productive business trips. Three-quarters of business travellers say Wi-Fi is vital to being productive on the road. Business travellers are most satisfied with Wi-Fi availability and reliability in hotel rooms (84%), compared with airplanes (50%) and trains (48%). They also say not having access to reliable Wi-Fi is the most frustrating part of business trips (25%), more than getting from one place to another (19%), the expense reporting process (17%), or booking or changing travel plans (14%).

Fig. 8 - Technology for Business Travel Component

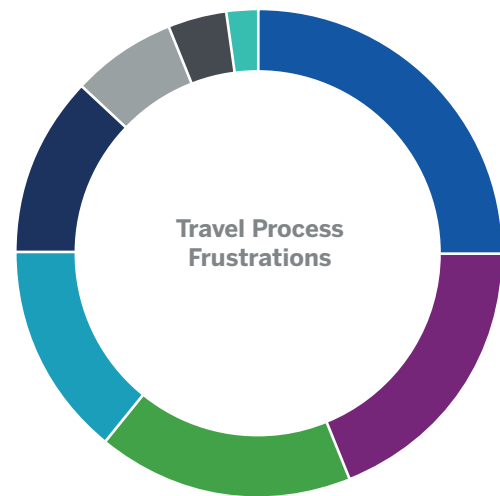
	2015	2016
Australia	100.8	99.3
Canada	100.2	99.5
Germany	94.4	93.9
Hong Kong*	100.0	97.1
Japan	88.9	86.8
Mexico	106.6	106.8
United Kingdom	100.1	100.1
United States	99.5	101.5

*Benchmarked against composite average of all countries

In addition, for trips they took in the past three months, business travellers put having better Wi-Fi access at the top of the list of support that would have helped them meet business goals (46%), over clearer objectives (42%), more time with clients (40%), a larger travel budget (37%), better tech support (32%) or something else (7%).

Among other things, business travellers' satisfaction with their access to technology, including Wi-Fi and mobile apps, helped keep scores for the Technology for Business Travel component of the Index close to what they were in 2015 for most countries. In 2016, component scores for Mexico, the United States, and the United Kingdom increased slightly from what they were in 2015, while scores for other regions declined.

Fig. 9 - Business Travellers' Most Frustrating Part of Travel Process



- 25% Not having reliable access to Wi-Fi
- 19% Travel itself (getting from one place to another)
- 17% The expense reporting process
- 14% Booking and/or changing travel plans
- 12% Not receiving reimbursements in a timely manner
- 7% Being required to stay within your company's travel policy
- 4% Nothing
- 2% Other

Millennials Lead Way in Using Mobile, Social Media for Work Trips

Millennials lead all other business travellers in their use of mobile devices and social media for work purposes when they're on the road. Seventy-two per cent of Millennials and 64% of all business travellers use mobile devices to check travel itineraries one or more times a day during trips. In addition, 55% of Millennials and 44% of all business travellers use mobile devices to check their expenses at least once a day while on the road.

When they're on work trips, 61% of Millennials and 50% of all business travellers use social networks such as Facebook, LinkedIn, Twitter, Xing or Mixi once or more a day for work-related purposes.

An increase in business travellers' adoption of social media helped boost Social Media Experience component scores in 2016 over 2015 for a majority of countries surveyed, including Australia, Germany, Mexico, and the United States.

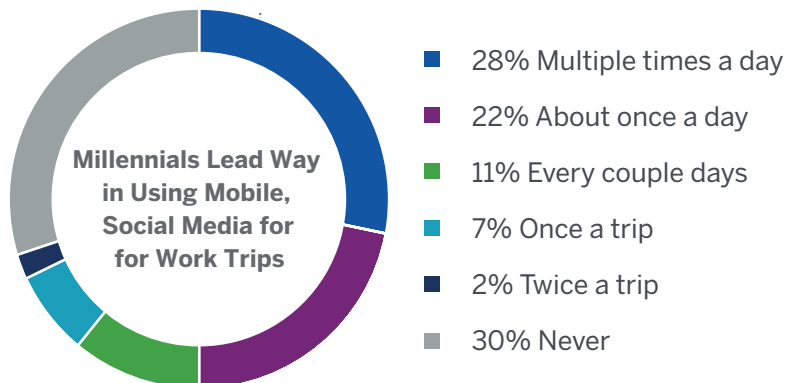
Employees of mid-sized businesses are also more enthusiastic than the average business traveller about using social media during work trips, with 58% checking social networks at least once a day while on the road. In addition, 54% agree that social media improves their ability to find reviews about hotels and other travel suppliers, 53% agree using social media helps them make plans to meet up with friends when they travel for work, and 49% say social networks improve their ability to connect with colleagues or business contacts.

Fig. 10 - Social Media Experience Component

	2015	2016
Australia	100.5	101.4
Canada	96.7	85.9
Germany	86.3	91.5
Hong Kong*	100.0	107.5
Japan	102.3	98.5
Mexico	115.9	127.1
United Kingdom	99.2	98.8
United States	101.1	115.9

*Benchmarked against composite average of all countries

Fig. 11 - How Often Business Travellers Use Social Media For Work During Business Trips



BUSINESS TRAVELLERS AROUND THE WORLD

Australia

Australian business travellers are generally positive about business travel experiences, with 79% satisfied with work trips they took in the three months prior to the survey and 81% satisfied they met all work-related goals on the trips. Two-thirds (66%) agree that they always feel safe when they're travelling on business. They're more optimistic about their company and industry than the overall economy, with 52% agreeing their respective employers are in excellent financial shape, 47% feeling that way about their industries, and 25% confident about the economy overall.

They are some of the least satisfied with access to reliable Wi-Fi when they're on the road, be it on airplanes, trains or hotel rooms. Given that, it's no wonder that 60% who travel for business prefer to do non-work activities on plane flights and 39% report never using a mobile device to access expenses while they're on the road. Likewise, 41% say they don't use social media for business purposes while travelling.

Canada

In 2016, Canada had the lowest composite Index score of all countries surveyed, dropping to 89.6 from 98.8 last year. Among other things, the overall decline reflects a drop in Canada's Expense Tracking and Management Component score, to 92.4 in 2016 from 100.4 last year. That drop could reflect business travellers' attitudes toward Canadian companies' slow adoption of new travel technologies. For example, more than half (53%) of business travellers in the region still submit hard copies of expense reports, compared to 45% of all business travellers.

However, Canadian business travellers are pleased with some aspects of being on the road: 81% are satisfied with their overall travel experiences and being able to accomplish goals for trips, 75% feel their company cares about their well-being when they travel for business, and 73% are satisfied with their options for taking taxis, private chauffeured cars or ride-sharing services. In addition, Canadians are some of the most satisfied with using a corporate card to pay for business travel expenses, 83% v. 71% for all business travellers.

Germany

German business travellers averaged five trips in the three months prior to the survey and approximately 14 trips in the preceding 12 months, more than business travellers in any other country surveyed. Germans are generally satisfied with work trips, but lag behind others in using mobile devices to track expenses or their itinerary, social media and sharing economy services for business trips.

Being on the road so much could make these business travellers more particular about the experience: they're among the least satisfied with getting through airport security, 44% v. 54% for the average business traveller, and with riding on a train, 50% v. an average of 56%. While 77% get laptops from their employer for business-related travel, 66% still submit hard copies of expense reports, and 37% say they never use a mobile device to access expenses when travelling. Likewise, 16% say they never use a mobile device to check their itinerary, compared to 10% of all business travellers. German companies are among the least likely to cover ride-sharing services in travel policies. Half of business travellers there say their employer's policy doesn't allow for using the services, 21% say they do, and 29% don't know.

Hong Kong

Business travellers in Hong Kong are among the least satisfied compared to other business travellers. Only 51% are happy with their overall experience, well under the 73% average for all business travellers. Hong Kong business travellers also are more likely to have to follow company travel policies: 51% say they are required to follow policies, compared to 44% of all business travellers. Less than half are satisfied with their employer's travel policy (46%) and the flexibility they have to plan trips (38%). Employees here who travel for work are among the least satisfied with hotel stays (56%), airplanes (54%), taxis, private chauffeured car services, or ride share services (45%), getting through airport security (41%), and completing expense reports (38%).

On a more positive note, Hong Kong business travellers have adapted quickly to new technology. When they travel for business, the vast majority use a mobile device at least once a day to check their travel itinerary (81%) or access expenses (61%) and use social media for business purposes (78%).

Japan

Japanese business travellers are among the least likely to be satisfied with almost every aspect of the experience, including various elements of travel, company travel policies, feeling safe, and options for expense reports. Only 48% are satisfied with their business travel experience in the three months prior to the survey and 55% are satisfied with their ability to meet business goals for those trips, compared to 73% and 77% for all travellers, respectively.

Some of the dissatisfaction could stem from their concerns about the economy. A majority neither agrees nor disagrees that their company is doing well financially (57%), their industry is in good shape (63%), or the overall economy is healthy (65%). Business travellers here are least likely to be satisfied with plane flights (49%), staying in a hotel (48%), airport security (35%), or taking a taxi, private chauffeured car or ride service (34%). Corporate travel policies are another source of frustration. Japanese employees are least satisfied of any business travellers surveyed with the flexibility they have for planning trips (34%), ease of understanding policies (33%), and options for changing itineraries as needed (30%).

Mexico

Every Index component score for business travellers in Mexico improved slightly or significantly from 2015 to 2016, giving it the highest composite score of the eight countries surveyed. Eighty-one per cent of Mexican business travellers are satisfied with the work trips they took in the three months prior to the survey v. 73% of all travellers. Travellers are satisfied with everything from hotels (85%) and plane flights (84%) to completing expense reports (80%) to paying for travel expenses with a corporate card (80%) or personal card (78%).

Mexican business travellers are on the cutting edge of travel technology on multiple fronts. Electronic receipts are three times as popular there as the average, 64% v. 22%. More than any other travellers, they prefer to pay for travel expenses with a mobile wallet linked to a corporate card (27%) or personal card (12%). They're also most likely to use social media at least once a day on the road (85%) or find it useful to read supplier reviews (77%), meet up with friends (74%) or connect with colleagues (73%). Mexican business travellers are most likely to say they feel safe on the road, 75% v. 58% for all travellers. Given such generally positive attitudes, it's not surprising that 70% would travel more if given the chance.

United Kingdom

U.K. business travellers' attitudes toward work trips are closer to average than any other country's travellers surveyed, a position that's been steady since 2015. Travellers here are more satisfied with some aspects of work trips than others, but expressed the least optimism about the economy of all business travellers polled, a view that appears to impact their attitudes toward future work trips. The vast majority is pleased with meeting business goals for trips (78%) and their overall travel experience (70%), including hotel stays (78%), plane flights (76%), renting a car (66%) and completing expense reports (58%).

Not all U.K. employees use travel technologies to make trips more productive. More than half (56%) still submit hard copies of expense receipts, 38% never use a mobile device to access expenses, and 14% don't use the devices to check itineraries. Only 22% agree the overall health of the economy is strong, compared to 35% of all travellers. In addition, they are less likely than other business travellers to believe management feels business travel is important for their company's overall financial performance, 54% v. 62% respectively. That could be the reason 67% say they'd travel the same amount or less if they could in the future, compared with 58% of all travellers surveyed.

United States

U.S. employees are enthusiastic business travellers, buoyed by a relatively stronger economic outlook for their company and industry, support they receive from management and travel policies, as well as their use of modern technology to be productive on the road. Close to seven in 10 (69%) believe their employer is in excellent financial shape, and 65% feel the same about their industry, compared to global averages of 57% and 51%, respectively. Travellers feel supported in their work, with 73% agreeing that management feels business travel is important to their company's financial performance. In addition, 78% agree their company cares about their well being on the road and 73% are satisfied with flexibility they have to plan work trips.

They use modern business travel tools to be productive: 77% get a company-provided laptop and 66% a smartphone. Eighty-four per cent say access to such technology helps them keep up with work demands on the road and 61% say submitting receipts electronically contributes to higher satisfaction with tracking expenses. Given the choice, 92% say they would travel the same amount or more in the future.

RECOMMENDATIONS

The GBTA Business Traveler Sentiment Index™ Global Report – June 2016, in partnership with American Express, offers insights into ways companies can help increase business traveller satisfaction and productivity while they are on the road and, at the same time, improve efficiencies and reduce costs. Some of those include:

Provide clear objectives and tools for success

Satisfaction with business travel is mixed, with business travellers in Japan and Hong Kong less satisfied than travellers from other countries. Company travel managers can use program benchmarking tools and other strategies to improve satisfaction levels. Business travellers feel more satisfied with their travel experiences if they feel supported by management and can meet goals for a trip. Companies can help by sending employees on the road with clear objectives and tools for success, including mobile devices, reliable Wi-Fi, and itineraries and expense reporting tools that are easy to access and use.

Ensure connectivity on the road

Travellers want Wi-Fi wherever they are to stay productive, and cite lack of reliable online connections as the most frustrating aspect of work trips. The problem is especially acute in places such as Australia where business travellers are dissatisfied with availability and reliability of Wi-Fi in planes, trains, and hotel rooms. Companies can keep business travellers productive and satisfied by providing reliable Wi-Fi connections as much as possible, including but not limited to offering hot spot internet access. So many business travellers appreciate being able to track itineraries and expenses electronically, companies should consider making smartphones standard travel gear if they don't already.

Consider using social media

Social media has the potential to be a powerful business tool; companies should determine internally how much or little they want to leverage it. If companies choose to encourage travellers to incorporate social media into work trips, they should consider establishing rules around its use. For example, companies can clearly communicate guidelines for publishing comments on crowd sourced review sites so the lines between business travellers' personal and professional social networking do not become blurred and less social media-savvy travellers don't inadvertently run into problems. Employees who've mastered social networking tools can help other co-workers adopt the tools.

Communicate safety concerns and procedures

Business travellers generally feel safe on work trips, but attitudes vary greatly, with employees in Japan and Hong Kong feeling less safe while travelling for business than employees in other regions. Companies can help make business travellers feel more secure and comfortable by communicating potential safety threats prior to departure and retaining travel insurance and assistance services. They can also help by ensuring travellers know what to do if problems occur. Having their employer express concern for their safety could go a long way toward making business travellers feel as if their company cares about them – a pivotal part of job satisfaction.

Emphasise the importance of travel

Business travellers don't work in a vacuum. They're in tune with what's happening in the world and have more confidence in the financial health of their own employer and industry than the economy at large. Companies can continue to boost that confidence by sharing information through multiple communication channels, including explaining the link between business travel and the organisation's financial performance, and the roles individual business travellers play in it.

Make managing expenses easier

Business travellers like the convenience of managing expense reports electronically. Companies struggling in this area may want to consider investing in expense management software. They may also want to look into features travellers say they appreciate, such as reports pre-populated with commonly entered data. Enough travellers are interested in using mobile wallets linked to corporate cards to pay for travel-related expenses that companies may want to explore offering that option. If companies move to mobile payments, they should consider offering similar fraud and security protections on them that business travellers appreciate having on corporate cards.

Educate employees on travel policies

Travel managers should educate employees on their corporate travel policies and consequences for going outside prescribed parameters and practices. At the same time, companies should make sure policies are flexible enough to accommodate travellers' needs. With more than one in five employees not knowing what their travel policies allow when it comes to sharing-economy options, companies have a big knowledge gap to fill. Organisations without policies addressing these areas should determine what is and is not covered to ensure their travellers' safety and security and then communicate it so travellers have clear information before they leave the office.

APPENDIX

Methodology

The GBTA Business Traveler Sentiment Index™ Global Report – June 2016, in partnership with American Express, was fielded between March 31 and April 13, 2016. The GBTA Foundation conducted an online survey of 3,500 business travellers whose primary residences are located in Australia, Canada, Germany, Hong Kong, Japan, Mexico, the United Kingdom and the United States, who are employed part-time or full-time, and who have taken at least four business trips in the previous 12 months. Because this research was conducted with an online, nonprobability sample, the margin of error cannot be calculated.

A business trip is defined as travel for a business purpose that includes an overnight stay or where a person travels 50 miles or more, one-way, from their primary residence, not including commuting to and from an office. A trip is further defined as starting when a person leaves their home location and ending when they return to their home location, regardless of how many places they visited in between.

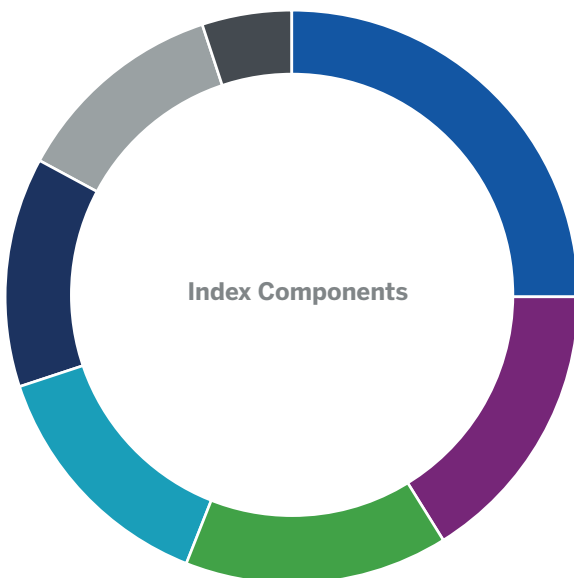
Respondent quotas were set by gender and age to ensure proper demographic, geographical and industry representation. In addition, several demographics and firmographics were included in the questionnaire to understand the characteristics of the population and divide data into meaningful comparison groups.

The purpose of the study is to measure change over time. Therefore, to ensure consistency with the methods, data inclusion, and calculations across both waves of research, the components and indices from 2015 were recalibrated and may not match the figures reported last year. While this may appear to be a significant discrepancy, because of how the Index and its components are calculated, it is imperative to reassess the data from the previous research wave in relation to the most recent wave.

This year's research included Hong Kong instead of Brazil. Because of this, Hong Kong's component ratings are benchmarked against the composite average of all countries for the year.

The Index is calculated by using key components of business traveller experience uncovered through our analysis and weighting those factors based on how well they correlated with overall business travel satisfaction, resulting in the graphical representation below. The value of each component represents how much of the overall sentiment index that component comprises.

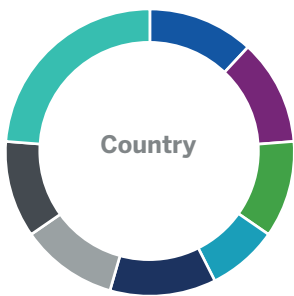
GBTA Business Traveler Sentiment Index™
 Composition of Index Components



- 25% **Overall Trip Experience and Travel Friction**
Attitudes toward air travel, hotel stays, and ground transportation
- 16% **Expense Tracking and Management**
Satisfaction with business travel expense management and tracking, and using credit or charge cards for business travel
- 15% **Travel Management Policy Friction**
Attitudes toward company travel policy management, flexibility and comprehension
- 14% **Business Travel Safety**
Attitudes toward travel safety and to what extent employers, travel suppliers, and security officials care about travellers' safety
- 13% **Corporate/Macroeconomic Environment**
Feelings about the health of the economy, company traveller works for and their industry
- 12% **Technology for Business Travel**
Opinions about technology's impact on business travel
- 5% **Social Media Experience**
Attitudes toward using social media while travelling for work, including finding or posting reviews of travel suppliers



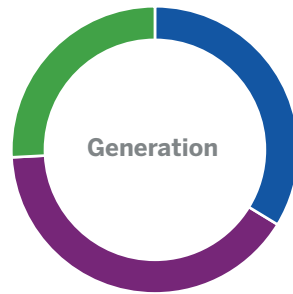
Respondent Profile



- 12% Australia
- 12% Canada
- 11% Germany
- 8% Hong Kong
- 12% Japan
- 11% Mexico
- 12% U.K.
- 24% U.S.



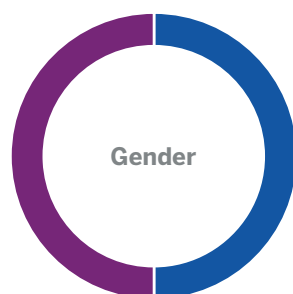
- 34% Small (99 or fewer employees)
- 32% Mid-sized (100-999)
- 32% Large (1,000+)



- 34% Millennial (18-34)
- 41% Gen X (35-54)
- 26% Baby Boomer (55+)



- 3% Administrative support
- 19% Associate or staff
- 29% Manager
- 17% Director
- 6% Vice President
- 19% Senior/Executive management
- 7% Other



- 50% Male
- 50% Female

About the GBTA Foundation

The GBTA Foundation is the education and research foundation of the Global Business Travel Association (GBTA), the world's premier business travel and meetings trade organisation headquartered in the Washington, D.C. area with operations on six continents. Collectively, GBTA's 7,000-plus members manage more than \$345 billion of global business travel and meetings expenditures annually. GBTA provides its growing network of more than 28,000 travel professionals and 125,000 active contacts with world-class education, events, research, advocacy and media. The Foundation was established in 1997 to support GBTA's members and the industry as a whole. As the leading education and research foundation in the business travel industry, the GBTA Foundation seeks to fund initiatives to advance the business travel profession. The GBTA Foundation is a 501(c)(3) non-profit organisation. For more information, see gbta.org and gbta.org/foundation.

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