

A person wearing a light blue long-sleeved shirt is pointing a black pen at a document on a desk. The document features a circular chart with five segments and a line graph below it. The background is a bright, out-of-focus office setting.

amadeus

# Nordic Business Travel Report

Insights and learnings from the Nordic  
Corporate Traveler study, 2012 – 2019

# Understanding the Nordic traveler

Commerce, communication and human interaction are becoming increasingly global. Evolving technologies and the pace of change is also getting faster.

Travel has always been significant, but what impact does this fast-changing globalized and digital world have on corporate traveler behavior and the management of business travel processes?



During the lock-down situation brought about by the COVID-19 pandemic, businesses have had little choice but to operate remotely through digital channels. While no one can predict the future, it makes people wonder what changes are here to stay and which will be quickly consigned to history.

Fundamentally, humans have demonstrated a strong desire to interact in person, and that includes when conducting business. We believe this deep-seated motivation will help accelerate a return to a new normal.

At Amadeus, we are convinced that understanding the needs and behaviors of business travelers is key to developing travel technology. Our goal is to jointly address the changing needs of business travelers and deliver flexible solutions that accommodate the directives and policies of companies of various sizes and industry verticals. Spanning a period of seven years, we have commissioned an online survey to help improve the understanding of the evolution of Nordic business travel<sup>1</sup>.

## Tapping into Nordic decision making

This survey was conducted across all Nordic countries—including Sweden, Finland, Norway and Denmark—to increase the understanding of how technology and new entrants such as shared economy companies are impacting corporate traveler behavior. We surveyed both decision-makers and business travelers to examine how company needs and preferences as well as technological development have evolved across the Nordic region and how these changes may impact the future success of business travel management.

What are the latest trends in Nordic business traveler behavior and how have they changed over the last seven years? How do the needs and wants of business travelers align or conflict with those of policy-makers? And how do business travelers want to manage their expenses? These are some of the key questions that we'll explore in this paper.

We hope you will find the insights we've compiled in this report as fascinating as we have.



**Ulla Persson, Amadeus Associate Director, Business Travel in Northern, Eastern, Central, Southern Europe**



**Johan Nordqvist, Amadeus General Manager in Scandinavia**

<sup>1</sup> This survey was carried out by Nordic Bench in the years 2012, 2014, 2017 and 2019.







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# 01 Methodology

Our online survey was conducted by the Nordic Bench company in 2012, 2014, 2017 and 2019.

An average of 1,100 respondents answered the survey each year. In 2019, 70% of the survey respondents worked for companies with a company travel policy and of these, 33% were from Sweden, 28% from Norway, 27% from Finland and 12% from Denmark. A similar split was observed in preceding years and the surveyed group included the same individuals to the extent possible.



33%  
Sweden



28%  
Norway



27%  
Finland



12%  
Denmark



# 01 Methodology

The survey was sent to business travelers and decision-makers from Nordic corporations. These two groups received slightly different questions, depending on their role in the travel administration process. In the 2019 survey 54% of the respondents were corporate travelers, 39% were decision makers, and 7% were company travel arrangers. Of the companies surveyed, 51% were small to mid-sized with 1-199 employees and the remaining were large companies with employee numbers ranging from 200 to more than 5000. The amount of large companies in the survey has grown over the years, from 40% in 2014 to 49% in 2019.

The survey was conducted late 2019 and the report was prepared in 2020 during the first months of the COVID-19 outbreak. Whilst the disruption across the travel industry due to COVID-19 has resulted in unprecedented uncertainty and change, the results of this study can provide a benchmark to address any future changes and support travelers, companies and the industry in the path to recovery.



## 02

# Business traveler behaviour

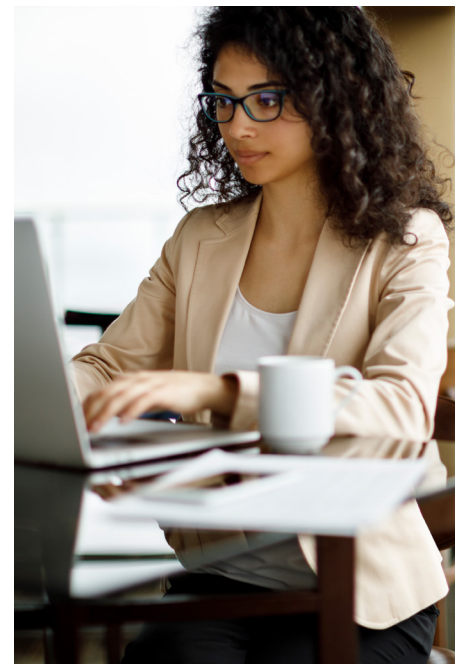
## Self-booking tools are on the rise

How do business travelers and decision-makers want to book their corporate travel, and how has this changed over the last seven years? This was a big area of focus in our surveys.

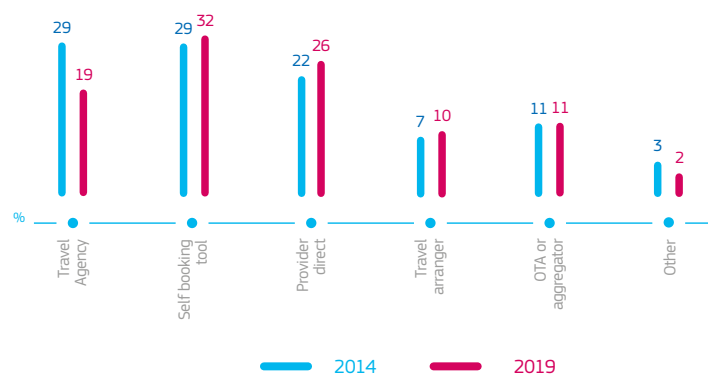
We asked survey respondents which channels they prefer to use including:

- Offline travel agencies - is travel booked over the phone or via email?
- Self-booking tools - do business travelers rely on a corporate travel booking tool which they can use to plan work trips themselves?
- Provider direct - do corporate travelers book travel on airline and hotel websites directly, with no intermediaries?
- Travel arranger - do corporate travelers rely on someone within their own company to manage all of their travel bookings?
- Travel aggregators - do business travelers use online travel agencies or metasearch engines such as Kayak, Skyscanner or Expedia to compare offers from various sources?

Throughout the last seven years, our survey documented a steady rise in the use of corporate self-booking tools for hotel and airline bookings, and a reduction in the use of offline travel agency bookings. In addition, our surveys reported an increase in bookings made through direct providers, such as airline websites and hotels. The amount of airline direct bookings rose from 22% in 2014, to 26% in 2019. This appears to be a clear reflection of the content fragmentation seen in the airline industry. With airlines no longer distributing all fares in all channels travelers are increasingly being pushed to search for and book flights direct on airline websites.



### How did you last book your business flight?





## 02 Business traveler behaviour

### Travelers want to stay at their favorite hotels

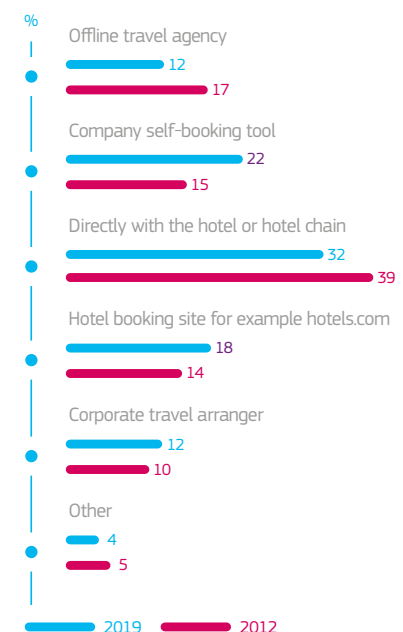
A similar pattern was observed with hotel bookings. In 2019, self-booking tools were more often used for hotel bookings than offline travel agencies. It's a dramatic change: in 2012 the situation was the opposite. However, unlike air bookings, direct hotel bookings have always had a larger share than other channels although the proportion of direct bookings have actually slightly decreased between 2012 and 2019. Direct bookings have always been popular for hotels because the majority of hotel bookings made by business travelers are paid with personal credit cards, unlike flight bookings.

In addition, hotel location is one of the first things travelers consider when planning a trip – they want to be close to where they need to be for meetings, and sometimes what they're looking for isn't available in their corporate booking tool. However, booking outside the managed channel puts corporate travel managers in a difficult position when they are negotiating with hotel suppliers – corporations with bigger proven travel volumes often get better deals. In addition, it's harder for corporate travel managers to follow through on duty-of-care obligations if they don't have full visibility of their travelers' whereabouts.

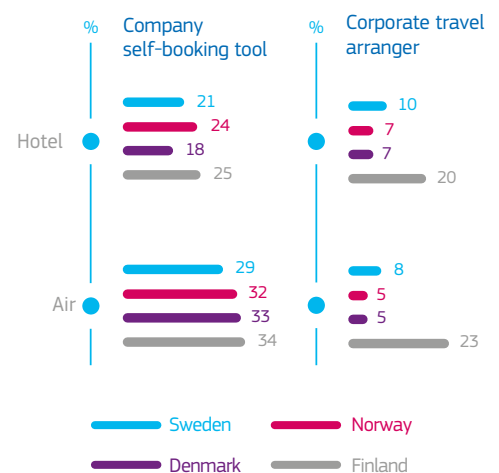
### Company travel arrangers are popular in Finland

Of all the countries surveyed, Finland is the most reliant of self-booking tools and travel arrangers. Finnish respondents are twice to four times more likely to use a company travel arranger than respondents from other Nordic countries. This could indicate a difference in company structure. Sweden has experienced a decrease in demand for company assistants over the past couple of years<sup>2</sup>. Many companies are restructuring and removing administrative assistants in an effort to save money by having each individual handle their own administrative tasks. Based on our survey findings, this seems to be a trend that hasn't yet happened in Finland.

#### How did you last book a hotel for a business-trip?



#### How did you last book your business flight and hotel?



<sup>2</sup> Arbetsförmedlingen 2019, Prognos: Var finns jobben 2019?, page 13  
<https://arbetsformedlingen.se/om-oss/statistik-och-analyser/analyser-och-prognoser/arbetsmarknadsprognoser/riktet/var-finnis-jobben-2019>

## 02 Business traveler behaviour

# Size matters

## Cost control is crucial for large companies

The survey found that the size of a corporation tends to impact travelers' choice of booking channel, regardless of whether or not they have a company travel policy.

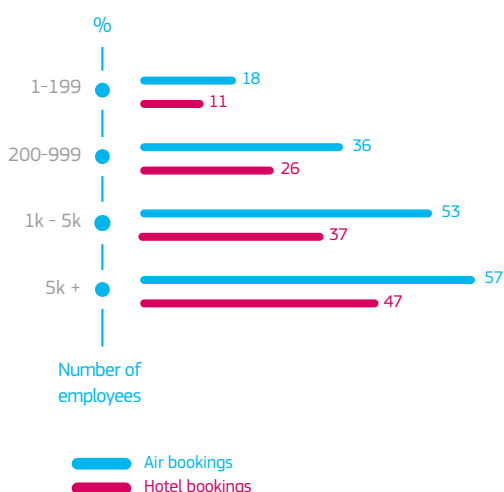
We found that employees working for larger companies are far more likely to use self-booking tools compared to those working for smaller companies. For example, our 2019 survey found that in companies with 5000 or more employees, 57% use self-booking tools for flights and 47% for hotels, compared to just 36% and 26% for companies with less than 1000 employees. Booking directly with airlines and hotel providers is less common amongst large companies - airline direct bookings reach 8%, and 18% of hotel bookings are made directly on hotel websites. Despite these lower percentages for larger organizations, the numbers represent a substantial group of travelers, which presents problems for the corporation that goes beyond duty of care issues.

## Small companies prefer booking direct

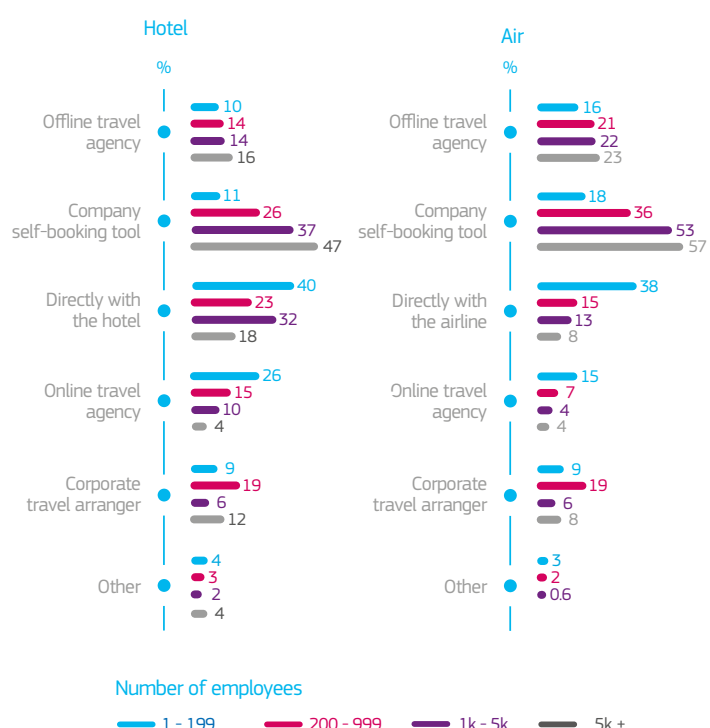
For smaller companies with less business travel, having a self-booking tool or a dedicated business travel agency may not be as necessary or cost-effective. Duty-of-care may also be easier to manage: if fewer employees are traveling, automated systems to keep track of employees may not be necessary. As a result, employees from smaller corporations are more likely to make their travel bookings directly on airline and hotel websites.

For corporations with up to 199 employees only 18% use self-booking tools for flights, while 38% prefer to book directly on an airline website. For hotel bookings only 11% of the respondents use a self-booking tool, compared to 40% who book directly on a hotel website.

### Air and hotel bookings with self-booking tools according to company size



### How did you last book corporate travel? According to company size





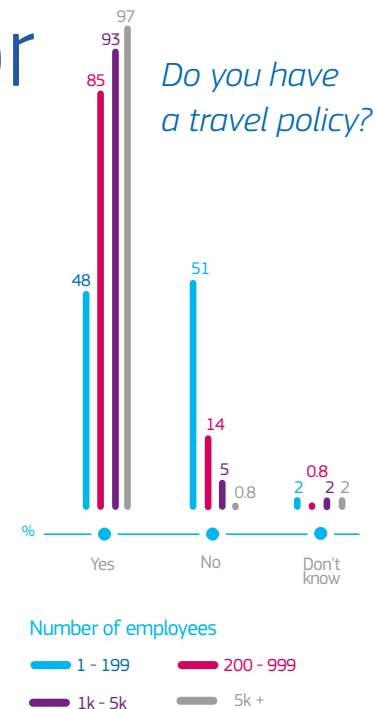
## 02 Business traveler behaviour

# How travel policies effect booking behavior

In 2019, 70% of the companies surveyed had a travel policy. As expected, our survey found that travel policy compliance was related to travelers' access to corporate booking tools.

### Company size influences the existence of a travel policy

The larger a company is, the more common it is to have a travel policy. In fact, our survey found that 97% of corporations with more than 5000 employees have a travel policy. Those companies with travel policies are much more likely to rely on offline travel agencies, self-booking tools and company travel arrangers. In contrast, only 48% of, companies with 199 employees or less have a travel policy, and, as previously outlined, they are much more likely to book their travel directly on airline and hotel platforms.

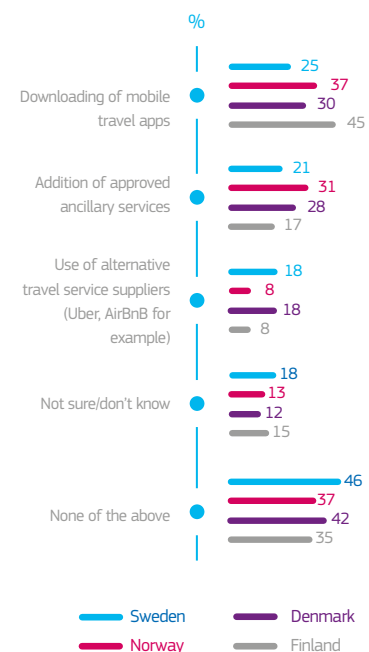


### Common Travel Policy Dilemmas

When asked what, if anything, corporate decision-makers plan to change or update in their company's travel policy, these topics were top of mind:

- **Mobile travel apps:** what should employees be allowed to download and use?
- **Ancillary services:** what should be included in the company's travel program?
- **Alternative suppliers:** should employees be allowed to use AirBnB, Uber, or other social sharing platforms?

*What areas are you planning on updating in your company's travel policy during the coming year?*



### Same but different

When it comes to travel policy changes, travel managers across Nordic markets have similar priorities, but their order of importance is slightly different. For example, although updating travel policies for mobile travel apps is a top priority across all markets, Finnish respondents are the most concerned about this topic. Meanwhile, policies around the use of alternative service suppliers are the most popular in Sweden and Denmark. This may be because Uber drivers convicted of providing illegal taxi services<sup>3</sup> made the headlines in Swedish tabloids in 2016, damaging Uber's brand credibility. In addition, Uber was forced to suspend all driving services between April 2017 and 2019 in Denmark due to the introduction of new taxi laws<sup>4</sup>. It is likely that these two events have encouraged corporations in Sweden and Denmark to clarify their travel policies to align with national rules and regulations.

<sup>3</sup> Sveriges Radio 2016, 21 Uber drivers have been charged, viewed on 10 February 2020, <https://sverigesradio.se/artikel/6388461>

<sup>4</sup> Oppegard, S (Fafo), Anna Ilse (FAOS, Copenhagen University), Jesnes, K (Fafo), Rolandsson, B (Gothenburg University) and Saloniemi, A (University of Tampere), March 2019, Fafo, Uber in the Nordic countries: Challenges and adjustments, <https://faos.ku.dk/pdf/faktaark/Nfow-brief1.pdf>

03

# Travel Expenses

## Expense Reporting

Our survey respondents identified travel expense administration as one of the most prioritized areas for improvement. To keep track of travel costs, corporations need travel expense reporting that allows accurate real-time updates of current travel expenses.<sup>5</sup>

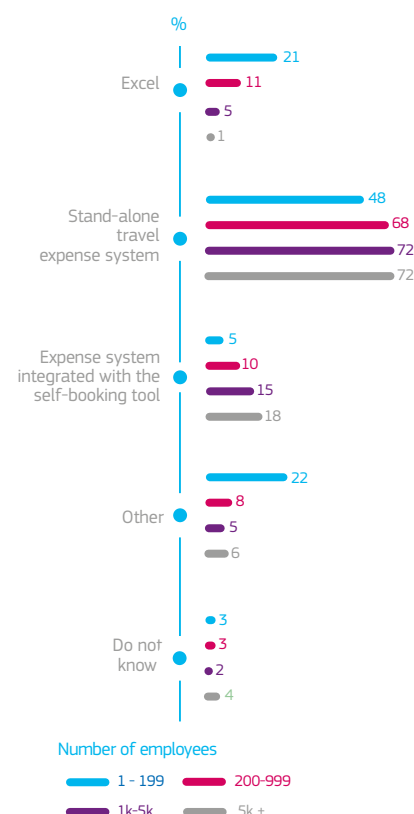
The main methods used by Nordic corporations to manage travel expenses include:

- **Stand-alone travel expense systems:** An expense management system that lets the user submit their expense reports and automatically handles approvals of expenses, per diem calculations etc. but where data from the travel system is not automatically transferred and pre-populated.
- **Integrated travel and expense systems:** An expense management system that lets users submit their expense reports and automatically handles approvals of expenses, per diem calculations etc. and where data from the travel system such as flight and hotel booking data is automatically transferred into the expense part of the system.
- **Offline solutions:** this includes excel spreadsheets and other non-digital travel expense management.

### Larger companies have bigger technology needs

Of our respondents, 59% used a stand-alone travel expense system to report their travel expenses in 2019. This number varies a lot depending on company size. For small companies, 50% of expense reporting is managed with general business software such as Excel or other offline solutions. For corporations with 1000 employees or more, 72% use a standalone expense system. The portion of corporations that have a travel expense reporting tool integrated with their self-booking tool remains low. Even in the largest corporations with more than 5000 employees, only 18% work with an integrated system which incorporates both booking and expense management in one single tool. Of those corporations who don't yet have an integrated tool, only 25% list this as a priority.

### How does your company report travel expenses?



<sup>5</sup> Amadeus IT Group and LSE Consulting 2017, Managing Every Mile: How to deliver greater return on investment from Travel and Expense, <https://amadeus.com/en/insights/white-paper/managing-every-mile-how-to-deliver-greater-return-on-investment#modal1728895156>



## 03 Travel Expenses

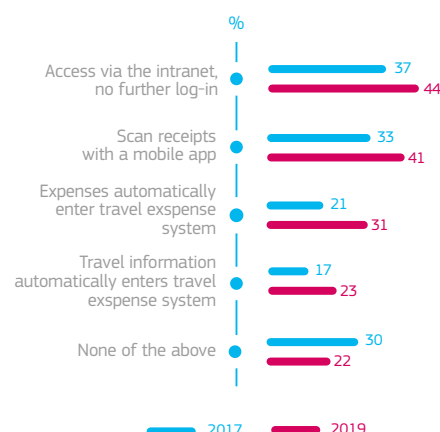
# Technological maturity a key enabler in the Nordics

All Nordic countries have gone through a digitalization process supported by pan-Nordic broadband networks<sup>6</sup> and access to data centers spread all over the region<sup>7</sup>. Denmark however appears to be slightly more old-fashioned than its neighbors as 25% of respondents still use Excel for travel expense reporting. Finland in contrast appears to be the most technologically advanced country – 71% of Finnish corporations have standalone travel expense systems. There is no significant difference across markets in the use of integrated travel and expense systems.

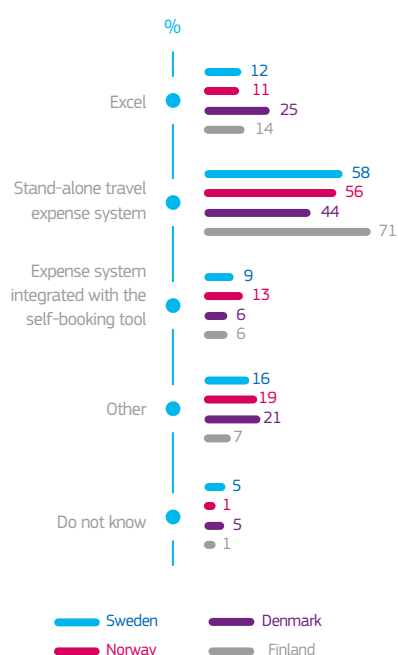
The top three most commonly used functions in expense reporting in the Nordic countries are access to expenses reporting through the intranet with no further login; scanning of receipts using a mobile app; and the automatic entering of expenses into travel expense systems during travel. All three areas have experienced an increase in usage in 2019 compared to 2017, which reflects the technological development in the expense sector during these years.

When it comes to travel expense automation, there are some significant differences between Nordic countries. Sweden in particular has a lower level of automation than its neighbors. This can be traced back to local legislation in Sweden, which as recently as February 2020 does not allow the digitalization of receipts. As a result, receipt scanning in Sweden is significantly lower compared to the other countries – only 20% compared to 54% in Norway. It appears that this has an impact on the use of other functionalities as well: Swedish users are also less likely to automatically enter their expenses during a trip compared to users from other Nordic countries.

### What functions do you most commonly use in your travel expense system?



### How does your company report travel expenses?



<sup>6</sup> Harrie, E 2019, The Nordics peak in 2019 digital EU index, Nordicom, viewed on 10 February 2020, <https://www.nordicom.gu.se/en/latest/news/nordics-peak-2019-digital-eu-index>

<sup>7</sup> Business Sweden n.d., Smart Industry, Business Sweden, viewed on 10 February 2020,

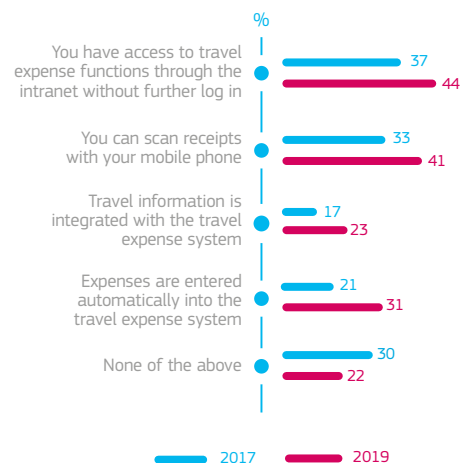
<https://www.business-sweden.se/en/Invest/industries/Data-Centers-By-Sweden/news-and-downloads/investment-news2/investments-in-nordic-data-centres-set-to-double-by-2025-new-report-reveals/>

## 03 Travel Expenses

### Ease-of-use and efficiency is key

When asked about their priorities for an expense system, decision-makers respond that efficiency and user friendliness are their top priorities. This seems like a reasonable answer given those functionalities are key in any online tool. The third runner up is the demand for scanning of receipts with a mobile phone. This priority has also increased in importance since 2017. Somewhat more surprising is that having expense tools integrated with the travel booking system is given 15% less importance in 2019 compared to 2017, which goes against the trend of increased automation that is otherwise seen across the survey. Decision-makers give the least importance to having all functionality integrated in one application.

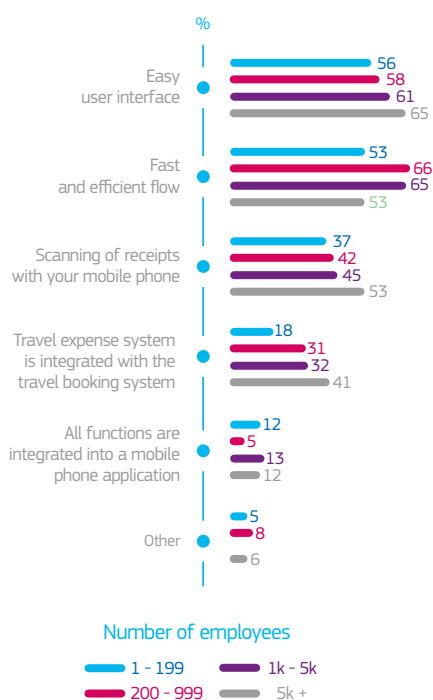
*What are the most important functions when reporting travel expenses?*



## 03 Travel Expenses

When comparing companies based on size, the main difference is that companies with more than 5000 employees prioritize the integration of travel expenses reports in their travel booking system more than smaller corporations.

*What are the top priorities for your travel expense system?*





## 04

# Business traveler trends

## Mobile is king

According to research from Deloitte in 2019, 92% of Nordic consumers use a smartphone every day.<sup>8</sup> Other than using smartphones for social media, banking errands or internet searches, the mobile phone has become an important tool for travel. Today, most travelers expect to be able to search for flights and accommodation on their mobile, as well as check-in to flights and download boarding passes. The demand for mobile travel services is growing.

*Which of the following travel functions have you used your mobile phone for during the past 12 months?*



### Mobile in the frontline of travel services

The most popular use of mobile phones in business travel among Nordic respondents are:

1. Checking in to flights,
2. Searching for flights,
3. Searching for hotel accommodation.

Checking in is by far the leading category, however between 2017 and 2019, there was no increase in the number of users who had checked in for a flight on their mobile in the previous 12 months.

However, mobile phone use for flight and hotel search and booking increased by 5% in just two years. This could be explained by the fact that this functionality is more widespread across airlines than it was previously.

Interestingly the survey shows that the use of mobile phones for travel purchases appears to be affected by the cost of what is being purchased. In regard to hotel and rail, the number of respondents who made a search is more or less the same as the number who made a booking, which means they likely searched and booked immediately on their mobile phone. For flights however, this is not the case. Instead there are 14% more people who searched for a flight on their mobile, compared to those who booked a flight. This means that people appear to not yet feel confident enough with their mobile apps to make a large and definite purchase like an airline ticket.

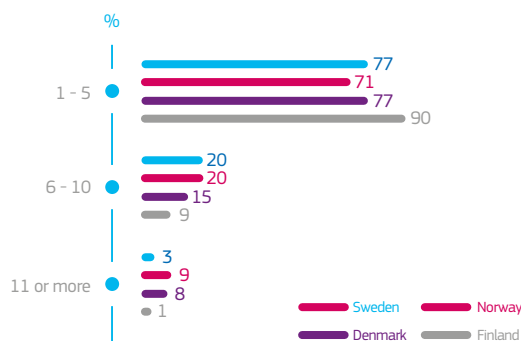
<sup>8</sup> Deloitte 2019, Global Mobile Consumer Survey 2019 – The Nordic Cut, Deloitte, viewed 10 February 2020, <https://www2.deloitte.com/content/dam/Deloitte/se/Documents/technology-media-telecommunications/Global-Mobile-Consumer-Survey-2019-Nordic-Cut.pdf>

## 04 Business traveler trends

### Finland less keen on mobile apps

The Nordic countries are famous for being early adopters of new technology<sup>9</sup> and consequently they are also frequent users of mobile apps. There is however a significant difference to be found between Finland and the other Nordic countries. Only 10% of Finnish travelers say that they have more than five applications installed on their phones, compared to 25% of respondents from other Nordic countries. These findings are supported by a recent Nordic study made by Statista<sup>10</sup> on the amount of mobile app downloads in 2019 in Nordic countries. The study shows that as many as 4% of Finnish people did not download a single mobile app in 2019. And while the majority of respondents in other Nordic countries downloaded 31 or more mobile apps in 2019, the majority of Finnish mobile users downloaded only 1-20 apps in 2019.

#### Number of mobile app downloads in 2019



*"[I want] a good booking app for business travel within Europe that is linked to a forum where business travelers can exchange experiences."*

- Sandra, employee at a mid-sized Swedish trade company with 50-60 travel days per year.



<sup>9</sup> Carlsson, J 2019, Why the Nordics are the Tech Market to Watch, First Capital, viewed 10 February 2020, <https://www.firstcapital.co.uk/smarter-thinking/why-the-nordics-are-the-tech-market-to-watch/>

<sup>10</sup> Tankovska, H 2019, Number of apps installed on a smartphone in the Nordic countries in 2019, by country, Statista <https://www.statista.com/statistics/569743/number-of-apps-installed-on-a-smartphone-in-the-nordic-countries/>

## 04 Business traveler trends

# Ancillary services increase in importance with travel frequency

Forty percent of Nordic travelers say that they find ancillary services important, but that number increases to 65% for road warriors with more than 80 travel days per year.

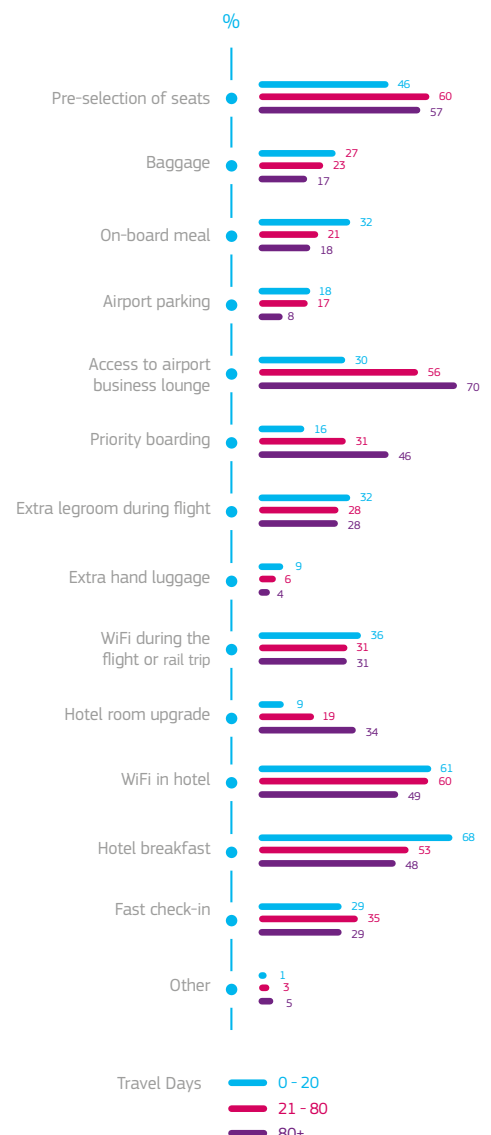
The importance of ancillary services has increased significantly since 2014, probably as a consequence of airlines unbundling their fares, making ancillary services a necessity if the same service level is to be maintained. The popularity of ancillary services varies slightly depending on travel frequency. However overall traveler priorities are:

1. **Business lounge access**
2. **Hotel breakfast**
3. **Pre-seating**

For frequent travelers with more than 80 travel days a year, access to a business lounge is the top priority followed by pre-selection of seats and hotel Wi-Fi.

In contrast 68% of travelers with 20 travel days or less prefer hotel breakfast above all other ancillary services. For frequent travelers, traveling is a regular part of their job, so the most important factor is to be able to secure a proper working environment. For sporadic travelers, traveling is more of a luxury, so the top priority is to secure a pleasant experience.

*Pick the three ancillary services most important to you*



*“Fast track is most important for me because I travel a lot”*

Fredrik, sales manager at a manufacturing company with more than 80 travel days per year.

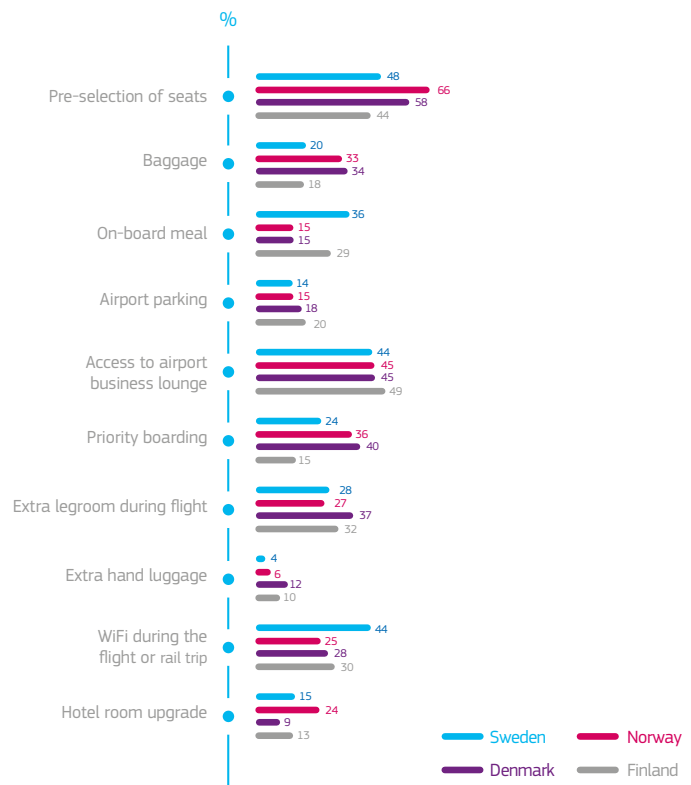


## 04 Business traveler trends

### Norwegians find ancillary services extra important

Ancillary services appear to be most important for Norwegians (47%) and Danes (43%), while Swedes (36%) and Finns (35%) find them less important. Finland is also the country with the most respondents (28%) who say that they find ancillary services to be unimportant. However, when looking at the types of ancillary services that each country prefers, Finland stands out as the only country where the majority of respondents prefer hotel breakfast above any other ancillary services. An overwhelming 73% of Finnish respondents request hotel breakfast, while the favorite ancillary service amongst Swedes (66%) is hotel Wi-fi. The top service for Norwegians is pre-seating (66%) as it is for the Danes (58%). It is however difficult to draw any clear conclusions out of these results as the choice of important ancillary services could be due to the airlines used and their respective offering.

*Pick the three ancillary services most important to you*



05

# Travelers and decision makers don't always agree

## Travelers demand better travel systems and easier expenses reporting

All respondents were asked: “What do you lack, or what would you like to improve, throughout the process from booking a business trip to when you or company employees return home and report their expenses?” As this was a free text question a wide range of different answers were received which was then grouped into different topics.

The results showed that respondents asked for improvements across the full chain of the travel process: **travel systems, booking, expense administration, handling of receipts** and **apps**. Many respondents also specifically requested for all travel administration functions to be fully integrated.



## 05 Travelers and decision makers don't always agree

### What the travelers want :

“An integrated system with an app where all parts of the trip can be collected.”

“Obtain all receipts via email so you don't have to keep track of loose paper receipts.”

“Integration between the travel agency's invoices, credit card invoices used for relevant costs and the travel expenses system.”

“To have a fully integrated system that follows the journey and all expenses in order to minimize work on this after the trip.”



## 05 Travelers and decision makers don't always agree

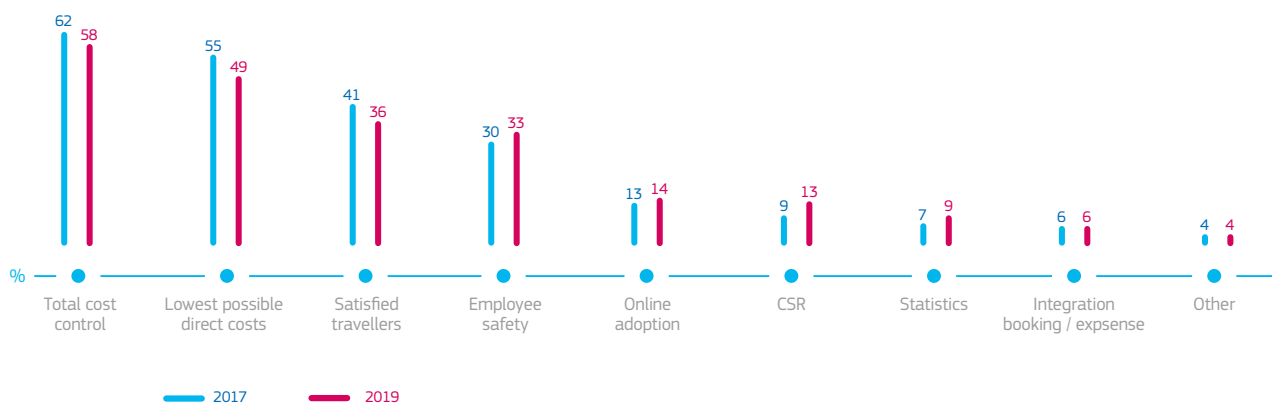
### Employer responsibility on the rise

Last but not least, the decision-makers were asked to select what was the most important to them when it comes to their company's business travel administration. They had a pre-defined list of topics from which they could select three.

It's no surprise that employers value cost above all else: cost-control earns a top position with lowest possible direct cost ending up in second place. But while cost-control is a top priority regardless of company size, the importance of reaching the lowest possible direct costs decreases in importance as corporations increase in size. For the largest companies, it is actually ranked in the second-to last-position.

Although cost-control has been a priority since 2017, in 2019 the percentage decreased somewhat to give room to focus on other areas such as employee safety, corporate social responsibility, online adoption, and statistics, which have all increased in importance. Somewhat sadly, the importance of traveler satisfaction has decreased in importance during this time. The category given the least importance is the integration between travel bookings and expense systems. This is unfortunate as it was one of the main system improvements asked for by the travelers in the free text question.

*What are your top priorities in business travel administration?*



## 05 Travelers and decision makers don't always agree

### Corporate social responsibility

There is currently a big focus on sustainability in the travel industry and possibly even more so in the Nordic countries due to the famous Swedish environmental activist Greta Thunberg. In our survey, the topic had received a 3 % increase compared to the previous survey however we expect this to continue to increase in upcoming studies as the topic is not likely to disappear from corporate agendas any time soon.

### Employee safety

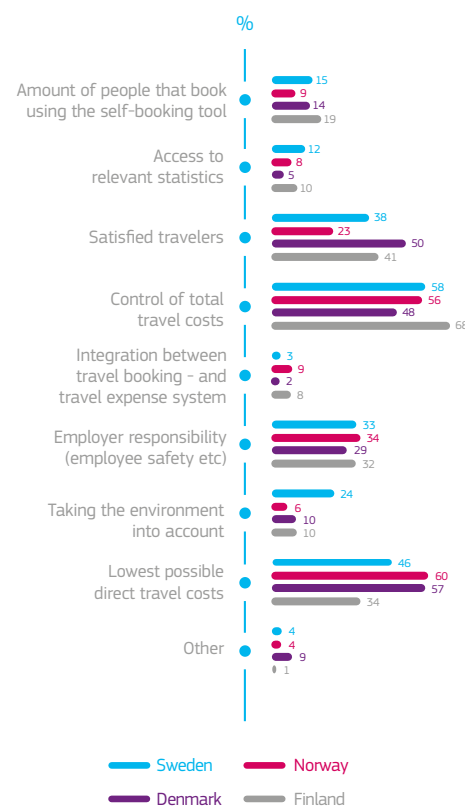
The larger a company is, the more importance is given to employee safety. Thirty percent of companies with 199 employees or less select this as a priority, compared to 53% for corporations with more than 5000 employees – this being their second highest priority after total cost control. Of course, these figures don't mean that smaller companies place less value on employee safety. They are more likely a reflection that more efforts are required to ensure employee duty-of-care in a large company with many employees. Also, considering disruptions in recent years, including COVID-19, it is not a surprise that the topic received additional focus amongst companies of all sizes.



### Priorities differ between countries

There are some big differences between the different countries when it comes to priorities. For Denmark, employee satisfaction is the top priority, although in Norway, only 23% of decision-makers include this in their top three. However, Norway is on top when it comes to employee safety with 34%, but only 6% prioritize Corporate Social Responsibility, compared to 24% for Sweden. This is an indication that the "Greta effect" is perhaps mainly touching the Swedish market. Finland is more than 10% ahead of the other markets for cost control, but far below the other markets for lowest possible direct costs.

#### *What are your top priorities in business travel administration? Country comparison*



## 06

# Key findings and conclusions

## Full-speed digitalization

The Nordics are on the frontline of travel management digitalization. The use of digital tools has increased substantially during the seven years of the study, and business travelers ask for full-scale integration from mobile travel apps to travel system and expenses reporting. Nordic companies appear to be rather fast in adopting new technology, but in some cases, local regulations are slowing down technological development.

The degree of digitalization in companies also depends on company size. Large companies have a greater need for centralized travel management, self-booking tools, and expense management systems, due to their duty-of-care obligations and large number of employees. As a result, large companies seem to depend more on digital solutions. Smaller companies, on the other hand, have fewer traveling employees which means that the cost-benefits do not always justify the expense of using a travel agency or a self-booking tool, even though the demand for ease-of-use and digitalized services still exists among their employees.





## 06 Key findings and conclusions



### Content is king

The survey showed a slight but still very present increase in direct airline bookings over the last seven years, likely due to the increased content fragmentation in the travel industry. If travelers can't access all fares in their booking system, they are more likely to rely on other channels to get the flight they want. This trend emphasizes the importance for corporations or travel agencies to keep content availability top of mind when sourcing a self-booking tool. If corporations are to achieve cost efficiency, they need to maintain a certain amount of travel volume, and this requires travelers to book within their booking tool as much as possible.

Also, for hotels, almost half of bookings are done through an unmanaged channel, which means that in many cases, corporations may lack visibility of their travelers' hotel booking. Travel managers need to ensure that their self-booking tools have the content and features travelers need so that they book within travel policy and guidelines. One way to achieve this could be through a company survey which asks travelers which hotel providers they prefer, so that travel managers can source the appropriate content to keep their employees happy.

### Ancillary service preferences depends on travel frequency

As airlines unbundle their offer, the demand for ancillary services is growing among Nordic business travelers. However, traveler preferences depend largely on how often they travel. Ancillary services can become a great way for travel managers to increase traveler well-being and company loyalty at a limited cost. While an occasional traveler can live with unassigned seating, this can cause extra stress for somebody traveling on a regular basis. Travel managers may consider giving frequent travelers access to extra ancillaries. This could be beneficial both for frequent travelers who will feel more valued, well-rested and motivated, as well as for the corporation which will gain a more productive and loyal employee. Similar findings were also reported in a previous Amadeus study on traveler well-being<sup>11</sup>

<sup>11</sup> Amadeus IT Group 2019, Business traveler well-being - How to keep your employees healthy, happy and productive when they travel for work, <https://amadeus.com/en/insights/white-paper/business-traveler-well-being>

## 06 Key findings and conclusions

### Decision-makers and travelers don't always agree on priorities

Traveler demands don't always align with the priorities of decision-makers. In the free text question of the survey travelers prioritized access to a fully integrated system between travel booking and expense management. At the same time, this was the lowest priority for decision-makers. Understandably, decision-makers are more focused on cost-control over other priorities, and this is reflected in the fact that less than 20% of the largest corporations have an integrated travel and expense process. This number is significantly lower for smaller companies. However, a change in strategy could satisfy both decision-makers' hunger for cost-savings as well as employee demand for travel booking and expense integration.

An integrated solution can provide cost-savings, shorter expense processing times, and improved visibility of all travel options, which encourages travelers to stay within the company travel program. All of this translates into increased savings for companies looking to reduce travel agency offline costs, duty-of-care administration times and lost savings in hotel negotiations.

### Notable differences between different Nordic markets

Although there are similarities across the Nordic region, the survey makes it clear that certain topics like workforce structure and local regulations have a significant impact on business travel management. Travel managers and travel agencies should be aware of these country differences as they develop business travel policies to meet the needs of each country's unique travelers.

So, as the travel industry continues to evolve, and as traveler behavior and demands change, the challenge for companies is to ensure that every business trip is as smart as it can be – both for the corporation and also for the traveler. There is no doubt that traveling for business is inherently good for a company and its employees. It's up to the organization to leverage the right technology and implement the necessary travel policies, to ensure employees make the most of their trip and deliver in return to the corporation.



# Appendix

## Terms used in the survey:

Offline travel agency:	An external travel agency handling corporate travel. The booking is made by contacting the travel agency over e-mail or phone.
Self booking tool:	An online booking tool used by employees directly to do their business travel bookings. The tool is setup to reflect the corporation's needs around policy compliance, payment, reporting, and preferred vendor usage. Fulfillments of booked tickets are still done by an offline travel agency.
Provider direct:	Booking a hotel or a flight directly from the webpage of the hotel or the airline.
Travel arranger:	A person in charge of corporate travel management at a company
Online Travel Agency/Aggregator:	A webpage that gathers different options for flights and accommodation, for example Hotel.com, booking.com, Trivago and Kayak.
Stand-alone travel expense system:	An IT system used only for reporting of travel expenses
Ancillary services:	Services attached to your journey, for example choice of seat during a flight (pre-seating), Wi-fi during flight or at hotel, hotel breakfast, business lounge access and fast track check-in at the airport.





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### Sweden

Hälsingegatan 49, 113 31  
Stockholm, Sweden

### Denmark

Lufthavnsboulevaden 14, 2770  
Kastrup, Denmark

### Norway

Munchs Gate 5B, 0165  
Oslo, Norway

### Finland

Tietotie 9, 01531  
VANTAA, FINLAND