

GBTA Business Traveler Sentiment Index™ Global Report – At a Glance July 2015

In partnership with American Express



Key Research Highlights:

- Wi-Fi tops the list of technologies that business travelers say are vital to helping them be effective and productive on the road.
- Millennial business travelers are among early adopters of mobile apps, social media and sharing economy services when traveling for work and expect to rely on them even more in coming months.
- Business travelers everywhere are concerned about the health of the global economy, but are optimistic about their own companies and industries.

Summary

From Wi-Fi to mobile apps, technology is changing how business travelers worldwide get work done, get around and stay productive when they're on the road, according to the first-ever GBTA Business Traveler Sentiment Index™ Global Report in partnership with American Express.

Global business travelers have grown to rely on Wi-Fi and expect it wherever they go, including hotels and airplanes, according to the Index, which measures global business travelers' attitudes and forecasts business travel trends.

Worldwide, more business travelers are beginning to use mobile devices, social media, cashless wallets, and sharing economy apps, such as on-demand ride services, while they're on the road to stay productive, get around, research travel vendors and meet up with business friends and colleagues.

Millennials are some of the most eager adopters of technology for business travel. According to the Index, 69% of global business travelers ages 18 to 34 "agree" or "strongly agree" that it's important to be able to access their itinerary or expenses on a mobile app. About half (53%) agree that when they travel for work, social media and internal company networks improved their ability to find reviews of travel suppliers. In the next 12 months, 39% of Millennial-age global business travelers expect to use an on-demand car service such as Uber or Lyft, compared with 24% of global business travelers overall.

Business travelers remain concerned about the health of the global economy, but are more optimistic about the health of their own companies and industries. Overall, 55% of global business travelers had neutral feelings about the world economy, compared with 34% who "agreed" or "strongly agreed" the economy is excellent and 11% who "disagreed" or "strongly disagreed" with the statement.

However, economic concerns don't appear to be cutting into business travelers' time on the road. Over the next three months, 70% plan to take the about same number of domestic trips and 67% plan to take about the same number of international trips. Overall, 71% of global business travelers said they were "satisfied" or "very satisfied" with their overall business travel in the past three months, according to the Index.

Background and Methodology

The GBTA Business Traveler Sentiment Index™, in partnership with American Express, is a proprietary, data-based barometer of business travelers' attitudes, and defines business travel as a trip with a business purpose that includes a minimum overnight stay or journey of 50 miles or more from the employee's primary residence. Results are based on a survey that GBTA conducted in partnership with American Express from March 17 to April 6, 2015. The survey polled 3,851 part-time or full-time employees in Australia, Brazil, Canada, Germany, Japan, Mexico, the United Kingdom, and the United States who



traveled for business four or more times in the previous 12 months. This is the first global Index and is being used as a benchmark; as a result, values

for all non-U.S. countries are set at 100. Values for U.S. results reflect changes since the U.S. Index launched in Q1 2015.

The Index is based on seven business travel components:

Overall Trip Experience and Travel Friction - Attitudes toward air travel, hotel stays and ground transportation.

Expense Tracking and Management - Satisfaction with business travel expense management and tracking, and using credit or charge cards for business travel.

Travel Management Policy Friction - Attitudes toward company travel policy management, flexibility and comprehension.

Business Travel Safety - Satisfaction with employers' efforts to keep travelers safe while they're on the road.

Corporate and Macroeconomic Environment - Feelings about the health of travelers' companies, industries and the economy.

Technology for Business Travel - Opinions about technology's impact on business travel.

Social Media Experience - Attitudes toward using social media while traveling for work, including finding or posting reviews of travel suppliers.

Key findings include:

Travelers want Wi-Fi and mobile-enabled services to stay connected and help with expense management - Business travelers from Tokyo to Rio de Janeiro value services that help them stay productive while they're on the road, such as Wi-Fi. Overall, 78% "agree" or "strongly agree" that access to Wi-Fi is vital to their work (see Fig. 1). 61% of all global business travelers said that in the future they would be "interested" or "very interested" in using GPS navigation tools to find services when they travel. Likewise, one-half (50%) said in the future they would be "interested" or "very interested" in using a mobile device to coordinate meals and travel, keep track of payments and expenses (49%), and take pictures of expense receipts (46%). Business travelers in Mexico are especially open to trying new services like these, and in the next 12 months, said they "will" or "definitely will" use an app-based car service (47%) and cashless wallet (36%).

The sharing economy is coming to business travel - On-demand travel services and social media that have become immensely popular with leisure travelers are catching on for business trips, with certain countries adopting tech-based offerings faster than others. Younger business travelers around the world are more likely to use app-based car services, crowd-sourced review sites for researching travel providers and social networks to connect with acquaintances on the road, according to the survey.



Fig. 1 Tech Keeps Business Travelers Productive on the Road

Wi-Fi has become a business travel mainstay. Close to eight in 10 business travelers worldwide agree it's vital to being productive on the road and rate it substantially higher than social media and mobile apps.

Business travelers who “agree” or “strongly agree” with the following:	Global Percent	Australia	Brazil	Canada	Germany	Japan	Mexico	UK	U.S.
Having access to Wi-Fi is vital to my work productivity while traveling	78%	75%	87%	83%	70%	52%	90%	80%	81%
My overall business travel experience is enhanced by the use of mobile applications that are provided by travel suppliers, event organizers or travel destinations	55%	57%	67%	53%	44%	36%	71%	55%	55%
Social networking sites improve my ability to make plans to meet up with friends when I am traveling for work	43%	42%	56%	39%	29%	35%	62%	42%	38%
Social networking sites or internal company networks improve my ability to find reviews about suppliers	43%	40%	60%	38%	32%	36%	62%	42%	36%
Social networking sites improve my ability to meet up with colleagues or business contacts when I'm traveling for work	36%	33%	50%	31%	26%	33%	54%	36%	30%

Source: 2015 Global Business Travel Sentiment Index July 2015, GBTA Foundation and American Express

Millennials are early adopters in the business travel space - Millennials, digital natives ages 18 to 34 who grew up alongside computers, the Internet and mobile devices, are among the first wave of global business travelers to fully embrace technology tools to stay in touch and be productive on the road. In addition to looking up travel supplier reviews, Millennial business travelers worldwide “agree” or “strongly agree” that when they’re traveling for work social media helps their ability to meet up with friends (59%) and colleagues and business partners (48%), compared with 43% and 36% of global business travelers of all ages respectively.

Millennials are interested in increasing how much they use tech-based travel tools. In addition to on-demand car services, Millennials said in the future they are “interested” or “very interested” in using GPS navigation tools (67%) and mobile devices for tracking loyalty and rewards points (62%), tracking payments and expenses (60%), coordinating business meals and local travel (61%) and recording images of business receipts (59%). Millennials in some countries are integrating new technologies into their business travel more rapidly than others. For example, 87% of Mexican business travelers in that age group “agree” or “strongly agree” that it’s important to be able to access their itinerary or expenses on a mobile app, compared with 69% of all Millennial business travelers and 64% of global business travelers of all ages.

Fig. 2 Global Millennials are Early Adopters

Business travelers ages 18 to 34 are among the most eager to try mobile apps and other tech for staying connected and effective when they're on the road for work.

How interested are you in being able to do each of the following when traveling for business (Among 18-34 year olds globally):	Interested	Neutral	Not interested
Using GPS navigational tools to find nearby stores, restaurants, service providers, etc.	67%	31%	2%
Ability to separate business expenses from personal expenses	64%	34%	3%
Keeping track of loyalty/rewards points or other benefits for your credit cards on your mobile device	62%	33%	5%
Using your mobile device to keep track of payments and expenses	60%	36%	4%
Using your mobile device to coordinate business meals, local travel, etc.	61%	36%	4%
Using your mobile device to record or image receipts	59%	34%	6%
Using loyalty rewards / points for business travel transactions	56%	32%	12%

Source: 2015 Global Business Travel Sentiment Index July 2015, GBTA Foundation and American Express

Travelers feel better about their companies and industries than the global economy - Financial uncertainties in the European Union, Brazil, Japan and other parts of the globe have affected attitudes of business travelers worldwide, who consistently put more faith in the health of their own companies and industries than the economy overall. More specifically, at least half of travelers from Mexico (65%), the United States (54%), United Kingdom (52%) and Canada (50%) agree the overall health of their industries is excellent. That's compared with less than half of travelers from Australia (46%), Germany (43%), Brazil (41%), and Japan (36%).

Travelers are relatively satisfied with transportation options - Travelers are relatively satisfied with transportation options for business travel, though there is a substantial opportunity for improvement, especially in particular areas (see Fig. 3). Overall, 64% of respondents say they were "satisfied" or "very satisfied" with business trips that involved plane travel during the previous three months, 61% expressed the same sentiment about renting a car, 59% for taking a taxi, private chauffeured car or on-demand car service, and 54% for taking the train (a transportation option not available in every country surveyed). German business travelers were least happy with train travel, with only 41% saying they were "satisfied" or "very satisfied."

Fig.3 Satisfaction with Business Travel

Business travelers are generally satisfied with traveling for work but there's still plenty of room for improvement across the spectrum of business travel-related services, most notably airport security.

Business travelers who say they're "satisfied" or "very satisfied" with...	Global Percent	Australia	Brazil	Canada	Germany	Japan	Mexico	UK	U.S.
Being able to meet all your business goals for the trip	75%	78%	73%	78%	70%	55%	83%	77%	79%
Staying at hotels	72%	70%	70%	78%	71%	49%	80%	70%	77%
Your business travel experiences overall	71%	74%	70%	75%	65%	47%	81%	72%	75%
Making your travel arrangements	70%	73%	66%	73%	64%	49%	81%	75%	73%
Traveling on an airplane	64%	70%	65%	62%	67%	52%	72%	69%	59%
Renting a car	61%	60%	57%	67%	63%	35%	68%	60%	67%
Taking a taxi, private chauffeured car, Uber or Lyft	59%	61%	54%	62%	57%	34%	67%	64%	63%
Riding on a train	54%	58%	62%	57%	41%	45%	61%	61%	57%
Getting through security at the airport	50%	56%	50%	49%	39%	36%	55%	49%	55%

Source: 2015 Global Business Travel Sentiment Index July 2015, GBTA Foundation and American Express

Most travelers feel safe - Most global business travelers feel safe on the road and think their companies and travel vendors do a good job of looking out for their safety. In all, 55% of global business travelers “agree” or “strongly agree” they always feel safe when traveling, 59% “agree” or “strongly agree” that business travel is generally very safe, and 62% “agree” or “strongly agree” that their companies care about their well-being and safety when they’re on the

road. While global travelers feel safe, they are frustrated with one common method of ensuring they are safe when they travel, namely airport security. Across the board, global business travelers are less satisfied with getting through airport security than with any other aspect of travel. Only half (50%) are “satisfied” or “very satisfied” with airport security, compared with 72% who say they are “satisfied” or “very satisfied” with hotel stays, 64% with air travel, 61%

with car rentals and 59% with taxi, private chauffeured car, Uber or Lyft.

Business travel payment options - When they’re on the road, global business travelers are generally satisfied with their company’s corporate card program provided to cover travel expenses, with 67% saying they were “satisfied” or “very satisfied.” Using mobile cashless wallets as payment options is catching on, in some countries faster than others.

More than a third of business travelers in Mexico (36%) and Brazil say in the next year they're "likely" or "very likely" to use cashless wallets, where credit or corporate card information is stored on a smartphone. That compares to 22% of global business travelers overall who say they are likely to try or switch to a cashless wallet in the coming year and only 16% of German business travelers and 13% of Canadian business travelers.

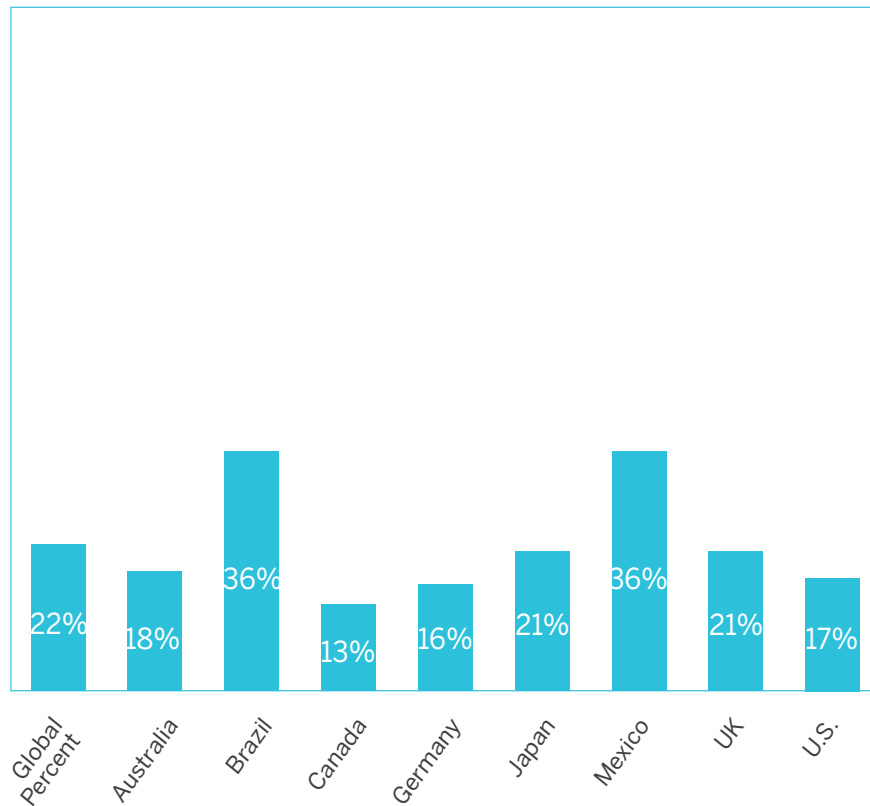
Fig.4 Interest in Mobile Cashless Wallets Growing

As mobile devices become ubiquitous, business travelers in some countries expect to use mobile cashless wallets in lieu of other kinds of payments.

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Travelers likely to use a mobile, cashless wallet where your credit card information is stored on your phone and you no longer need to carry cash or physical credit cards



Source: 2015 Global Business Travel Sentiment Index July 2015, GBTA Foundation and American Express

Country Highlights: Business Travel Around the World

Australia - Australian business travelers value their time on the road and see it as having a direct result on their individual and company performance. That could help explain why they value their companies' travel policies. In all, 73% of Australian business travelers "agree" or "strongly agree" that traveling for work is critical for helping them meet annual performance goals, compared with 67% for all global business travelers, 62% of business travelers from Germany and 51% from Japan. A full 97% of Australian business travelers believe business travel is "somewhat effective" or "very effective" in helping their companies acquire new clients. 70% "agree" or "strongly agree" that it's very easy to follow company travel policies, compared to 67% of all global business travelers, 61% of business travelers in Germany and 45% in Japan.

Brazil - Business travelers in Brazil are among the most enthusiastic and advanced users of social media and mobile devices while traveling for work. Of all Brazilian business travelers, 60% agree that social networking sites or internal company networks improve their ability to find reviews about suppliers, compared with 43% for global business travelers overall. In addition, more than half of Brazilian business travelers find social media helpful while on business



trips for meeting up with friends (56%) and colleagues or business contacts (50%), compared with averages of 43% and 36% respectively for all business travelers worldwide.

Canada - Canadian business travelers agree more than most that technology helps them stay productive when they're out of the office, but are generally more comfortable with tried-and-true services than emerging offerings. 69% "agree" or "strongly agree" that access to technology helps them keep up with work demands while they're on the road, compared to 74% for the average global business traveler. Of all Canadian business travelers, 85% say Wi-Fi access is "very important" wherever they are. Yet, Canadians aren't as quick to try newer travel apps and sharing-economy services

as some. Only 6% said they "definitely will" use an app-based, private car service in the next 12 months, compared with 24% for all global business travelers. Likewise, only 13% said they would use a mobile-based cashless wallet in the next year, compared with 22% of all global business travelers.

Germany - Compared with business travelers in other parts of the world, Germans are slightly less satisfied with many aspects of their work trips. In all, 65% of German business travelers said they were "satisfied" or "very satisfied" with their overall business travel experiences in the past three months compared with a global average of 71%. Of all German business travelers surveyed, only 39% were "satisfied" or "very satisfied" with getting

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through airport security, for example, compared with a global average of 50%. Substantially more German travelers report that they always feel safe when traveling (62%) than feel business travel in general is safe (44%). It is possible that travelers' perceptions were adversely affected by the March 24 Germanwings plane crash in France, which took place during the time the Index survey was conducted.

Japan - Japanese business travelers take the train more than any other business travelers surveyed, one outgrowth of a rail system known for its high-speed trains and regarded as one of the best in the world.¹ In the past 3 months, 53% of Japanese business travelers took 1 to 3 train trips, compared 27% of all global business travelers. Despite how frequently they use it, more than half (53%) of Japanese business travelers are neutral on train travel, reporting that they were neither satisfied nor dissatisfied with it, a slightly greater contingent than the 45% who said they were "satisfied" or "very satisfied." Lower satisfaction levels could be the result of cultural differences, as Japanese business travelers also indexed lower than business travelers from all other countries across all other Index components except for social media.

Mexico - Business travelers in Mexico rate their experiences

with work trips higher than the global average across every Index component. Mexican business travelers' sentiments are particularly high regarding using social media and the state of their companies and the economy. In the next three months, Mexican business travelers are more likely to expect to take more domestic business trips, compared to business travelers from any other country surveyed. 32% of Mexican business travelers expected to "greatly increase" work trips within the country during the following 90 days, compared with 12% of business travelers overall, 10% in Japan, 9% in the United Kingdom, and 6% in Canada.

United Kingdom - U.K. business travelers are in the middle of the pack when it comes to adopting mobile apps and sharing economy-based services for work trips, with one exception - paying for and tracking expenses. Six in 10 U.K. business travelers are "satisfied" or "very satisfied" with processes they use to complete expense reports, compared with 55% of all global business travelers. Paper receipts are still most common (71%), but U.K. business travelers also submit receipts as images from a photocopier or scanner (36%) or mobile device (24%).

United States - U.S. business travelers remain relatively upbeat about traveling for work, with 79% "satisfied" or "very satisfied" with being able to

meet business goals for trips over the past three months. Overall, the GBTA Business Traveler Sentiment Index™ for U.S. business travelers fell slightly (though not a statistically significant drop), to 98.7 points in Q2 from the initial benchmark of 100 in Q1, the change that is not statistically significant. In Q2, more than seven in 10 said they were "satisfied" or "very satisfied" with staying in hotels (77%) and making their own travel arrangements (73%) compared with 78% and 75% respectively in the previous quarter. U.S. business travelers remain satisfied with the flexibility they have in planning business trips (65%), their company's travel policies (62%), ease of understanding travel policies (62%), and making changes to itineraries (58%). U.S. travelers' attitudes toward expense tracking and management fell 1.9 points from Q1, to 98.1, the biggest drop of any other Index component. Although the drop is not statistically significant, it highlights the opportunity that the travel industry has to enhance this component. Even so, 63% of U.S. business travelers are satisfied with their ability to keep track of their receipts, and 57% are satisfied with the methods they use to complete expense reports. In Q2, 65% of U.S. business travelers said they felt like their companies cared about their well-being and safety when they were traveling for work, compared with 71% in Q1.

¹ [Trains](#), Japan: the Official Guide, Japan National Tourism Organization

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RECOMMENDATIONS

The GBTA Business Traveler Sentiment Index™, in partnership with American Express, offers insights into ways companies could help increase business traveler satisfaction and productivity while on the road. Some of those include:

Support technology tools to help Millennials and other business travelers be productive - More business travelers of all ages, and especially Millennials, are using social media to connect with friends, colleagues and business contacts while on the road, giving travel providers an opportunity to improve how they connect with customers. As social media sites become an increasingly common way for travelers to connect with friends and colleagues, and share experiences and recommendations, providers should be prepared to respond quickly to comments and feedback. Especially in early social media adopter countries such as Brazil and Mexico, companies could use the opportunity to find out what types of information business travelers would prefer to receive through that channel.

Consider integrating alternative car services into your travel policy – Review your company's travel policy for guidelines on using app-based car services available in a growing number of countries as alternatives to traditional taxis and private chauffeured cars. If these services are a fit for your

company's needs and culture, they may add convenience and cost savings, and align with travelers' growing interest in trying new, mobile-based services.

Help travelers stay comfortable – Counteract travelers' frustrations with airport security by making other aspects of air travel as convenient, productive and comfortable as possible. That could include offering a range of flexible and affordable flight options, covering ancillary fees for Wi-Fi and baggage, investing in programs such as TSA PreCheck™ in the United States, and offering travelers opportunities to save money or earn rewards on travel. Travel managers could negotiate additional fees into airline contracts, which can offer substantial savings to their program.

Strike a balance between policy and control - Structure travel guidelines to fit a company's unique needs, ensuring that the policy includes clear guidelines but is also responsive to the changing needs of your business travelers. In countries such as Japan, Brazil and Germany where satisfaction with business travel is lower, educating travelers on policy requirements and ongoing, open communication about travel and finances could improve attitudes toward traveling for work.

Help travelers feel safe - Companies have a moral and legal obligation to protect the health, safety, and security of their employees, particularly those who travel abroad. Put duty of care measures in place to help protect

and reassure employees, including risk management programs that incorporate health, medical and safety policies, traveler training and awareness, destination information, traveler tracking, and security support. On the industry level, continue to help find ways to reduce travelers' pain points while maintaining safety.

Simplify expense reporting where possible - Streamline processes to make expense reporting more efficient and travelers more productive. Especially in countries such as Japan where business traveler attitudes toward work trips aren't as strong, companies could benefit from greater efforts to improve the expense reporting process. Consider offering electronic or mobile-based processes for filing expense receipts and reports to help business travelers get reimbursed faster, and improve compliance with travel spending policies.

Look at travel vendors with rewards programs - Frequent business travelers value collecting and using rewards and perks, so consider partnering with travel vendors that offer such programs, including offerings that let travelers collect points from transactions made on a corporate card, or track them on a mobile device. Such programs are most likely to appeal to travelers in countries such as Mexico and Brazil, where a large majority of business travelers are interested in using points for business travel transactions and keeping track of points on mobile devices.

Appendix

METHODOLOGY

The GBTA Business Traveler Sentiment Index™ Study – July 2015, conducted in partnership with American Express, was conducted March 17 to April 6, 2015, among frequent business travelers in Australia, Brazil, Canada, Germany, Japan, Mexico, United Kingdom and United States through an online research panel. Overall, 3,851 respondents qualified for the study (their primary residence is located in one of eight countries in the study, they are part- or full-time employees, and they took at least four business trips in the previous 12 months, from the point that the survey was taken). The survey was carried out by the GBTA Foundation.

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NUMBER OF RESPONSES AND MARGIN OF ERROR BY COUNTRY

Margin of Sampling Error by Country

	Number of Respondents	Margin of Sampling Error (+/-)
Global	3,851	1.6
Australia	431	4.7
Brazil	427	4.7
Canada	441	4.7
Germany	435	4.7
Japan	409	4.8
Mexico	440	4.7
United Kingdom	430	4.7
United States	838	3.4

In the study, 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 or from an office. A trip is further defined as starting with a person leaving their home location and ending when they return to their home location, regardless of how many places they visit in between.

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

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GBTA BUSINESS TRAVELER SENTIMENT INDEX™: CURRENT VALUES

The analysis represents the second wave of responses from U.S. business travelers and first wave of responses from business travelers in seven other countries. The first wave of responses established a benchmark for a business traveler sentiment index based on five key components: (1) Overall Trip Experience and Travel Friction, (2) Travel Management Policy Friction, (3) Expense Tracking and Management, (4) Business Travel Safety, and (5) Social Media Experience. The second wave refined existing questions, added new questions, and included two new components: (6) Technology for Business Travel and (7) Corporate/Macroeconomic Environment.

The partners aim to track changes to the overall Business Traveler Sentiment Index™ and individual Index components over time. As this is the first global analysis, it is being used as a benchmark, with all values set at 100. New values will be calculated based on percentage change overall and for individual components. For example, a 3% increase in business travel safety would push that index component to 103.

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 organization. Headquartered in the Washington, D.C., area, GBTA has operations on six continents and 7,000-plus members who collectively manage more than \$345 billion annually in global business travel and meetings expenditures. GBTA provides a growing network of more than 28,000 travel professionals and 125,000 active contacts with world-class education, events, research, advocacy and media. The GBTA 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 funds initiatives to advance the business travel profession. The GBTA Foundation is a 501(c)(3) nonprofit organization. For more information, see gbta.org and gbta.org/foundation.

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ABOUT AMERICAN EXPRESS GLOBAL CORPORATE PAYMENTS

Through its Global Corporate Payments division, American Express offers a suite of B2B and T&E payment solutions that can help organizations streamline processes and identify opportunities to help drive savings and efficiency. American Express can help your organization improve working capital flexibility and your relationships with suppliers. For more information, visit <https://business.americanexpress.com/us/>

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The next GBTA Business Traveler Sentiment Index™ will measure attitudes and plans for U.S. business travel for the third quarter of 2015. The GBTA Foundation and American Express plan to release the Q3 U.S. report later in the year.

This executive summary of the GBTA Business Traveler Sentiment Index™ is available online (<https://business.americanexpress.com/us/business-trends-and-insights/business-traveler>).

To purchase the full report of the GBTA Business Traveler Sentiment Index™, visit <http://www3.gbta.org/1/5572/2015-07-09/2jwdv5>.

For questions or additional information about the study's methodology, please contact resources@gbtafoundation.org.

American Express has partnered with the GBTA Foundation to create this report.

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