ECN

Office to Onboard:

How Programmatic DOOH reaches the Travelling Professional

VIOOH

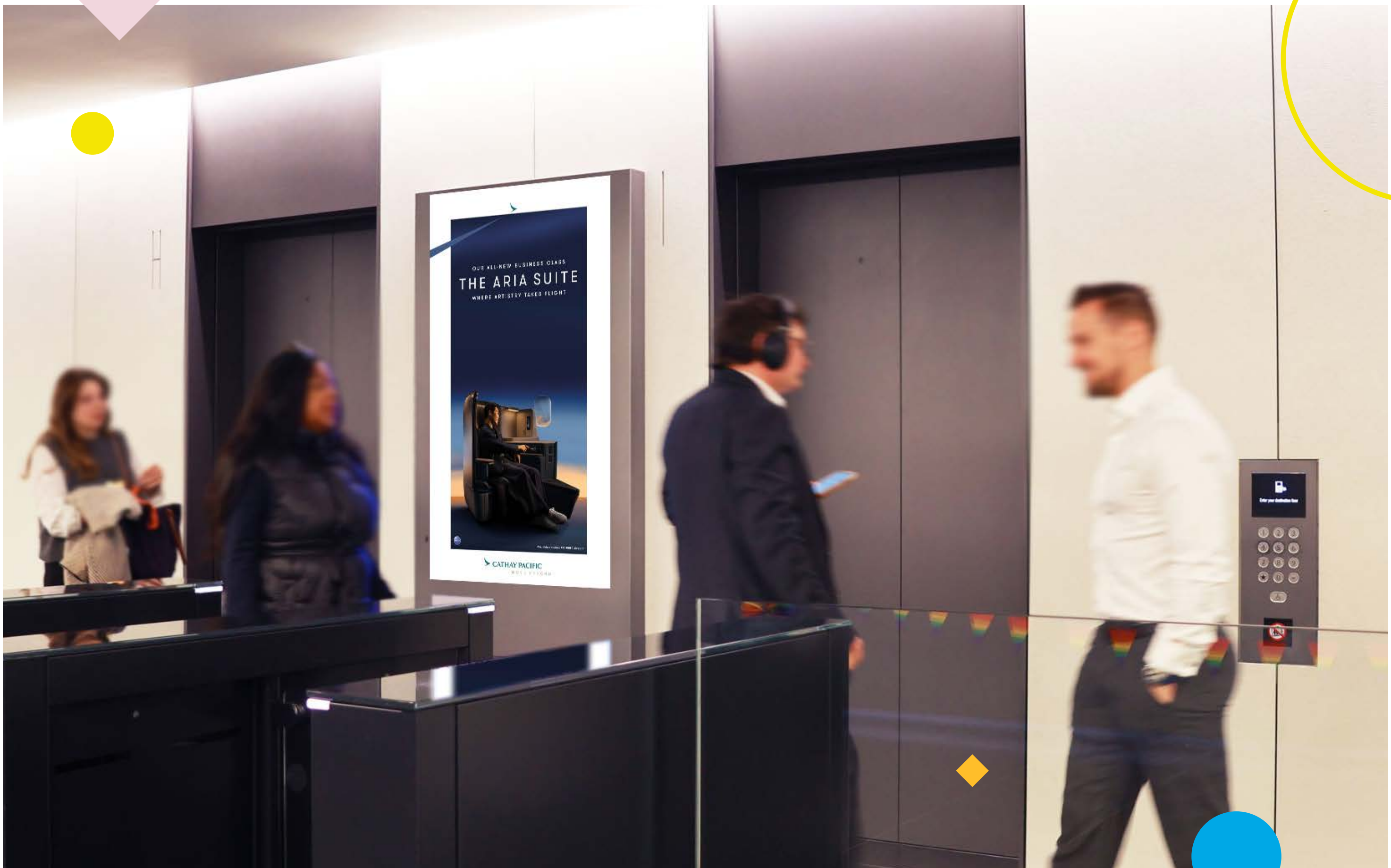
July 2025

Introduction

Business travel remains a vital aspect of professional life across dynamic economies such as the UK, France, and Germany. Yet, as business patterns evolve post-pandemic, a new cornerstone has emerged for advertisers: the office.

Today's professionals are not only travelling; they are also returning to city-centre offices in large numbers and with greater frequency. This renewed presence has created a powerful and consistent media environment within Central Business District (CBD) offices, meaning that programmatic digital out-of-home (pDOOH) advertising can now reach professionals both on the move and crucially, at the heart of their planning and booking behaviours.

In partnership with ECN, VIOOH explored the evolving behaviours of business travellers in the UK, Germany, and France. This report examines their travel habits, workplace patterns, and attitudes toward advertising, while making the case for the office as the most reliable, frequent, and effective space for brands to connect with high-value business audiences.



The Business Travel Landscape

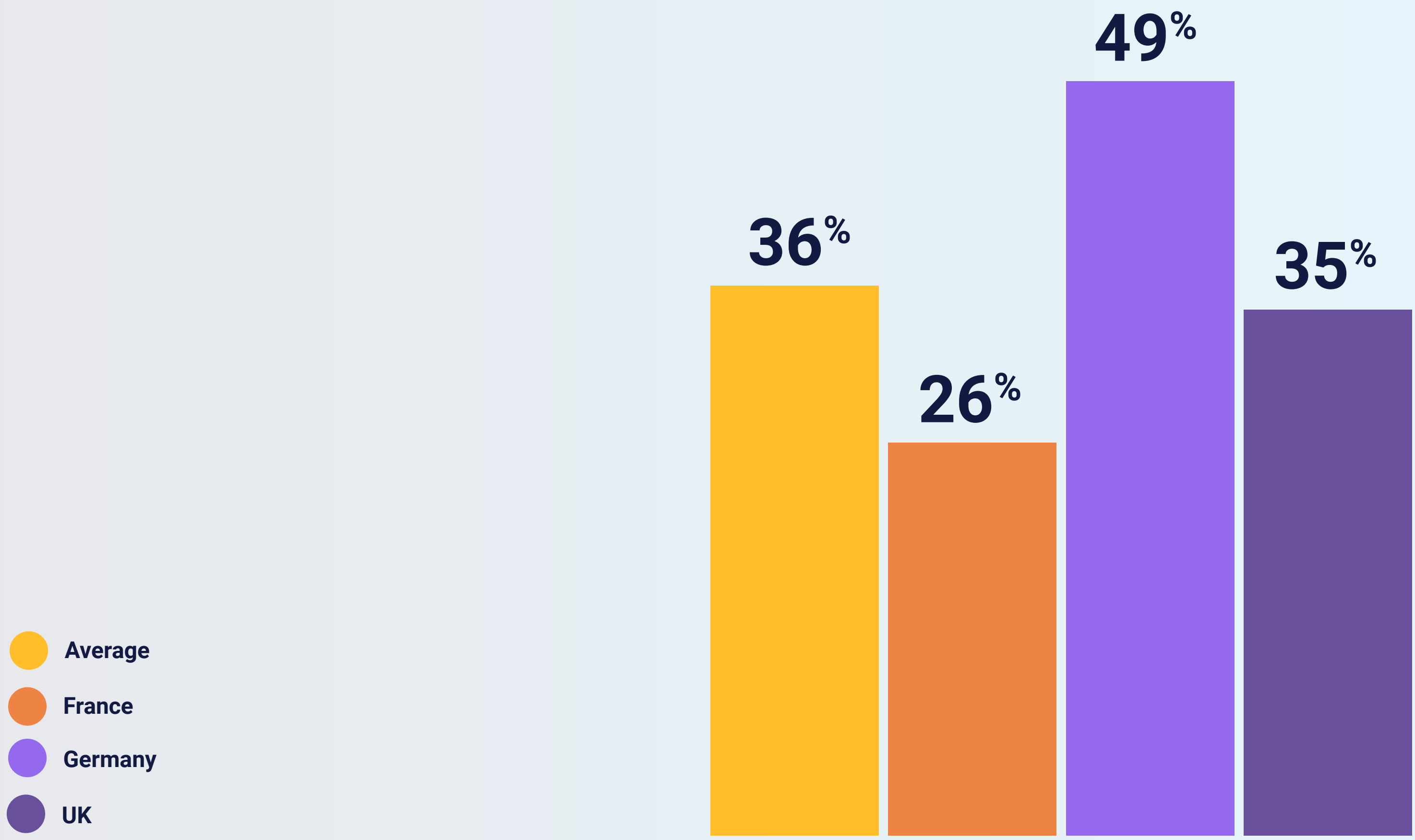
49%

nearly half of all respondents expect to travel more in the coming 12 months

The rise of virtual meeting platforms such as Zoom, Google Meet and Microsoft Teams during the COVID-19 pandemic has transformed communication across the business landscape. With 83% of respondents describing virtual meetings as often or always effective[1], it's clear these tools now play a critical role in daily workflows.

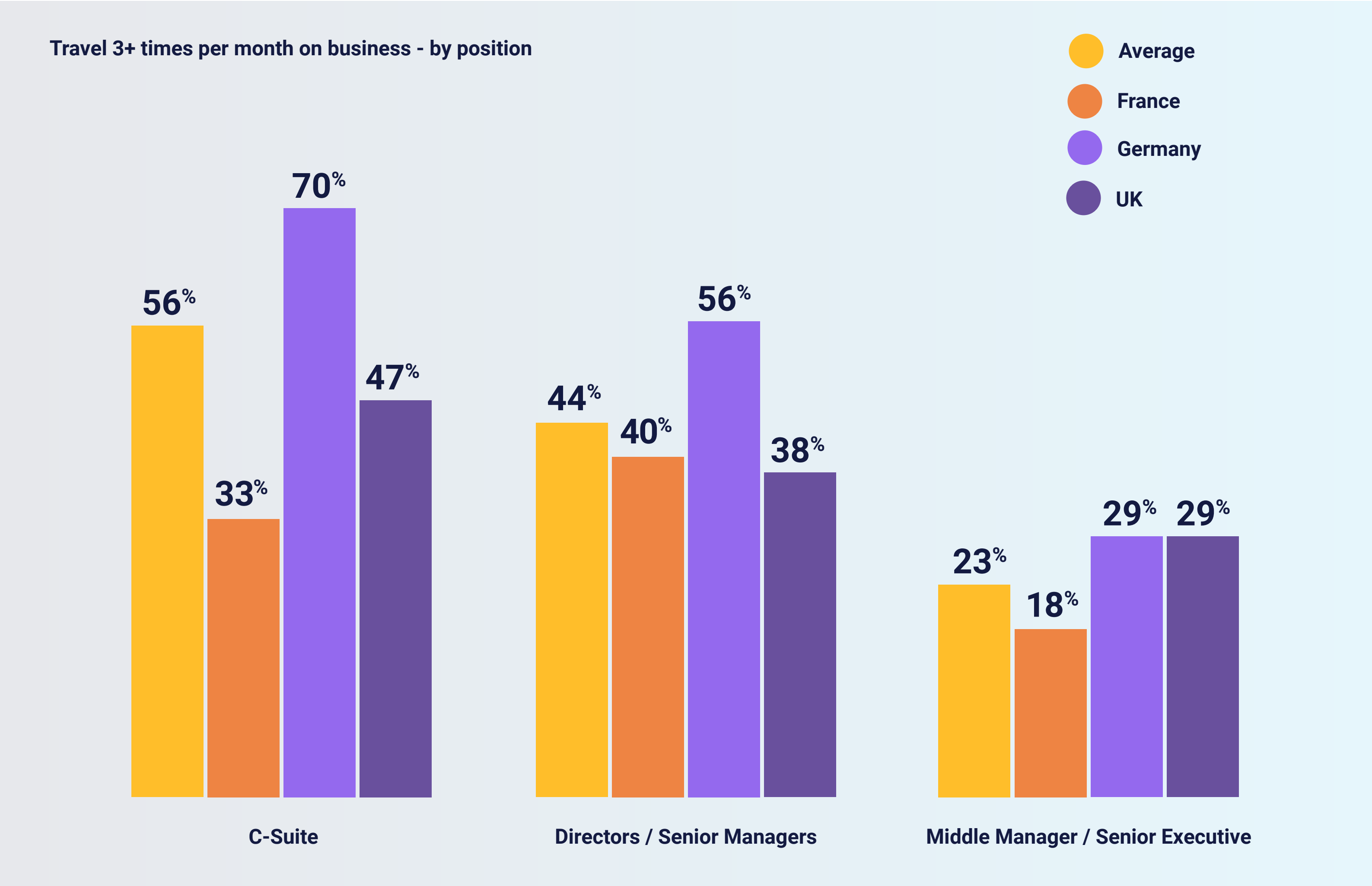
Yet this shift does not signify the end of business travel. In fact, in-person interactions remain a valued aspect of professional engagement—whether meeting face-to-face or experiencing new products first-hand. Over a third (36%) of respondents still travel for business at least three times per month, a figure that rises significantly in Germany - a disparity likely influenced by Germany's decentralised network of business cities.[2]

If we look further ahead, the appetite for travel appears strong, where nearly half (49%) of all respondents expect to travel more in the coming 12 months than they did over the past year.



Travel 3+ times per month for business

Senior executives, especially the C-Suite, emerge as the most frequent travellers, with over half (56%) reportedly taking three or more business trips per month, compared to 44% of Directors or Senior Managers and just 23% of middle managers.



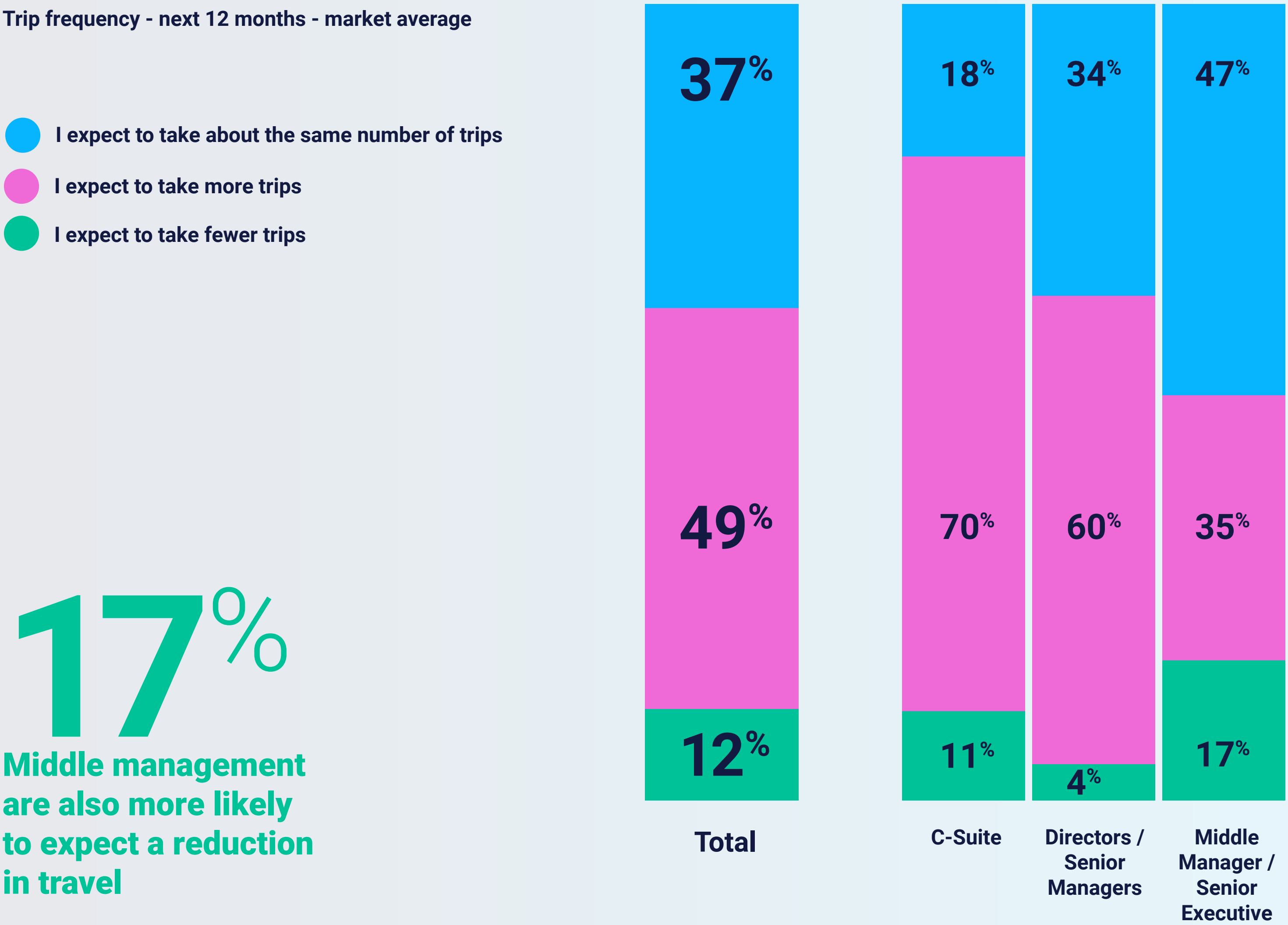
56%

Senior executives, especially the C-Suite, emerge as the most frequent travellers

Looking toward the next 12 months, senior leaders also drive expectations for increased travel. Across all markets, 70% of C-Suite executives and 60% of Directors/Senior Managers anticipate more frequent trips—compared to just 35% of middle managers. This upward trend is particularly visible in the UK and Germany, both markets where executive travel is already high.

Middle management are also more likely to expect a reduction in travel, compared with other levels of seniority. Overall, 17% of middle managers foresee fewer trips in the year ahead, compared to just 7% of respondents at Director/Senior Manager level or above (4% Directors/Senior Managers, 11% C-Suite).[3]

Trip frequency - next 12 months - market average



17%

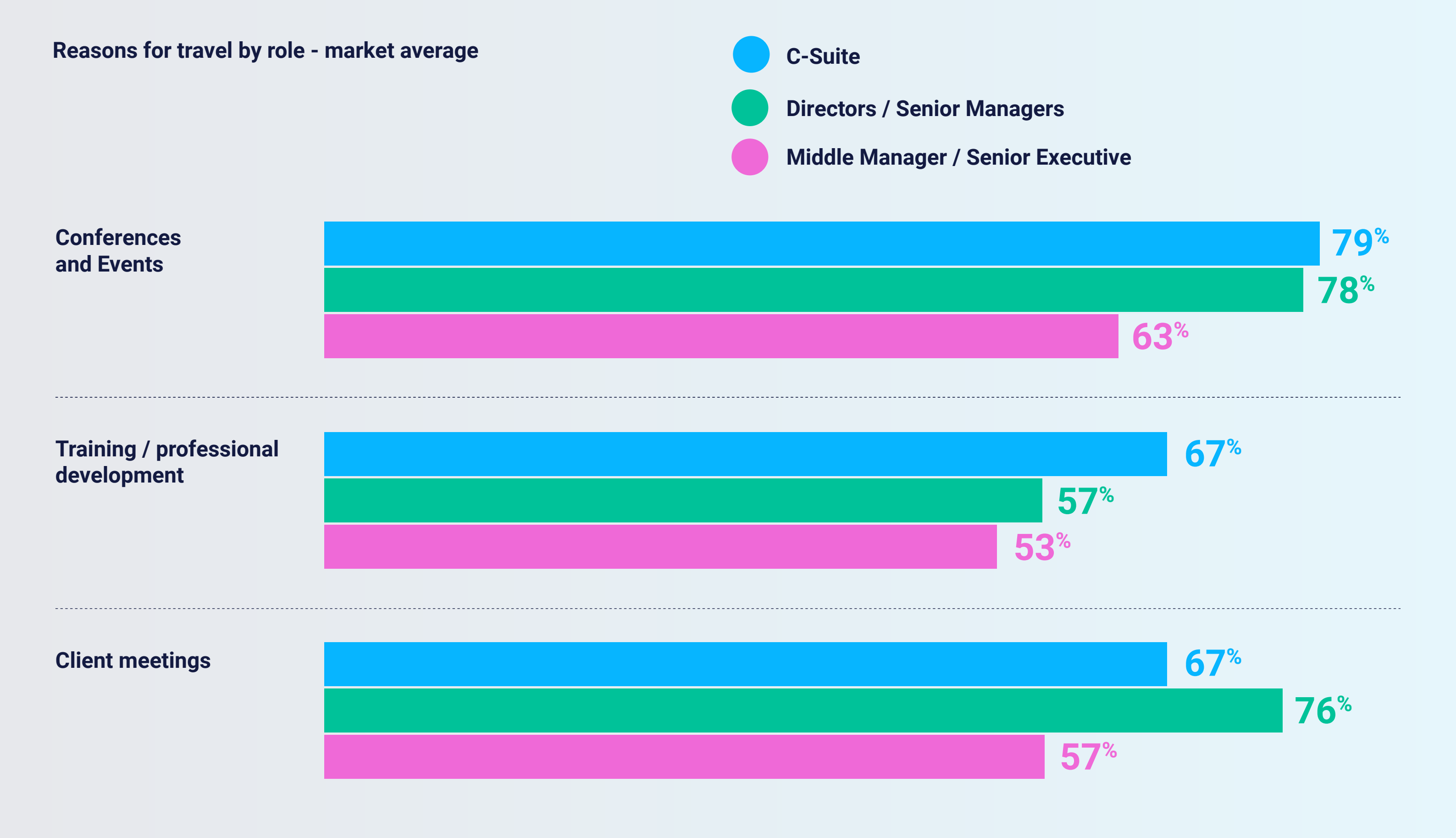
Middle management are also more likely to expect a reduction in travel

Company size remains a key determinant of travel frequency. Half (50%) of those travelling three or more times per month work in large businesses (250+ employees), while this drops to 36% in medium-sized companies (50–249 employees), and to just 9% and 5% for small (10–49 employees) and micro (0–9 employees) businesses respectively.[4]

Travel 3+ times per month by business size - market average

In terms of the reasons why executives travel, it's notable that those in more senior roles travel extensively to attend conferences and events. A majority of C-Suite executives (79%) and Directors/Senior Managers (78%) travel for this purpose, compared to 63% of middle managers.

C-Suite executives also travel regularly for training and professional development, with 67% doing so—compared to 57% of Directors and 53% of middle managers. When it comes to client meetings, Directors/ Senior Managers lead (76%), followed by the C-Suite (67%) and middle management (57%). [5]



79%

of those in more senior roles travel extensively to attend conferences and events

[1] Q11: How effective do you feel virtual meetings (i.e. video platforms such as Zoom) are as an alternative to traditional face-to-face meetings? Base: 600
[2] Q7: How often do you travel for business purposes (not commuting)? Base: 600
[3] Q10: Over the next 12 months, how do you think your frequency of business trips will change compared to the past 12 months? Base: 600
[4] Q8: What is your business size, by number of employees? Base 600
[5] Q9: What are the key reasons for your business trip? Base: 600 Multi-code question.

Business Travel Begins In The Office

The office is the highest intent and highest frequency environment to reach business travellers. While virtual meetings remain effective and senior leaders expect an increase in travel, this is not coming at the expense of time in the office, where in-person work is experiencing a resurgence.

City-centre offices function as strategic hubs for large, high-value businesses. Among companies with 250+ employees, 59% are based in CBDs, compared to 26% in business hubs outside the city and only 13% in suburban locations.[6]

These offices are key sites for business decision-making. 65% book business travel from the office and 55% book accommodation from the office — positioning the office as a crucial conversion point for advertisers seeking to engage professionals at the moment of decision. [7]

65%

book business travel from the office

78%
of respondents are in the office 3+ days a week

City-centre workplaces not only host a steady presence of affluent senior decision-makers, but are also equipped with premium indoor digital screens, often found in office lift lobbies and reception areas — which are among the most trusted media formats for business travellers. Forty percent of respondents trust indoor OOH advertising, and this trust is even higher among high-value segments: 46% among C-suite executives, 43% among CBD-based professionals, and 44% among employees at large firms.[8]

Metric	Business Travel (Total)	Office Attendance (Total)
High Frequency	5+ trips/month (10%)	5 days/week (28%)
Moderate Frequency	3-5 trips/month (26%)	3-4 days/week (50%)
Low Frequency / None	<2 trips/month (64%)	1-2 days/week (18%)

55%
book accommodation from the office

Despite being digital-natives, business travellers face constant online noise and distraction. Indoor OOH in office settings offers a unique blend of credibility, trust, and high dwell time — capturing attention when it matters most.

With office attendance expected to remain stable or increase over the next year, indoor OOH in these environments presents a logical and lucrative pDOOH channel that can drive brand recall and influence both B2B and B2C purchasing decisions - before they even embark on a journey.

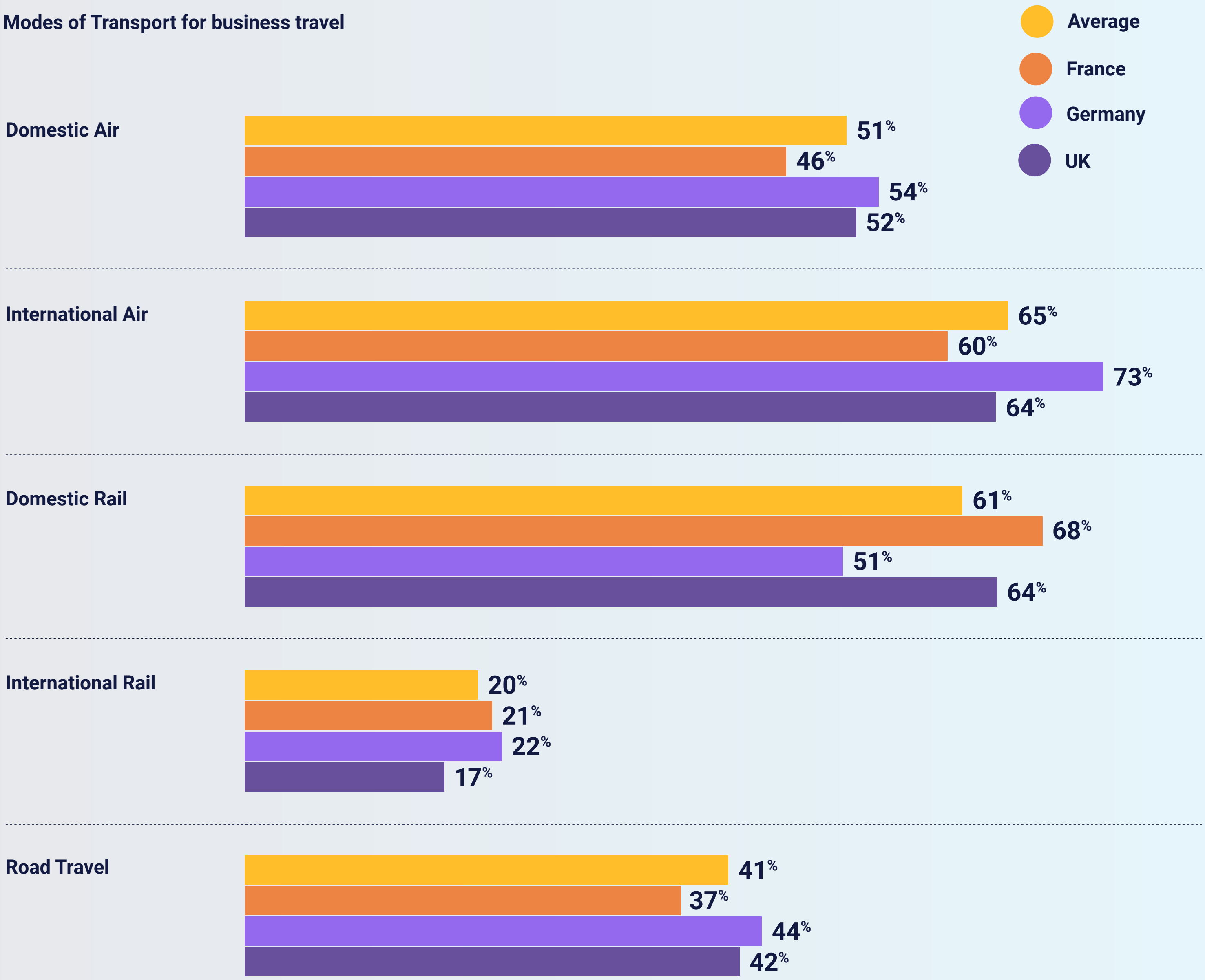
40%
of respondents trust indoor OOH advertising, this is even higher among high-value segments

[6] Q27: Thinking about your company's office location, please tell us which of the following most closely matches the one you visit most regularly during the average week. Base: 574
[7] Q12: If you are responsible for booking business travel and accommodation, where do you physically tend to do so? Base: 600
[8] Q31. Which of the following types of advertising do you trust? Base: 600. Multi-code question.

The Business Traveller Journey: Key Touchpoints for pDOOH

As this business traveller audience heads out on a typical journey, navigating between a mix of office environments and transit hubs, a wealth of prime programmatic digital out-of-home opportunities emerge. Airports, train stations, road networks, and crucially, the office itself, all serve as impactful touchpoints for reaching professionals in motion.

Travel behaviours indicate a diverse use of transport modes. International air travel leads, used by 65% of respondents for business, followed by domestic rail (61%), domestic flights (51%), and road travel (41%). Additionally, 20% use rail services to cross international borders—highlighting the multi-modal nature of business mobility. [9]



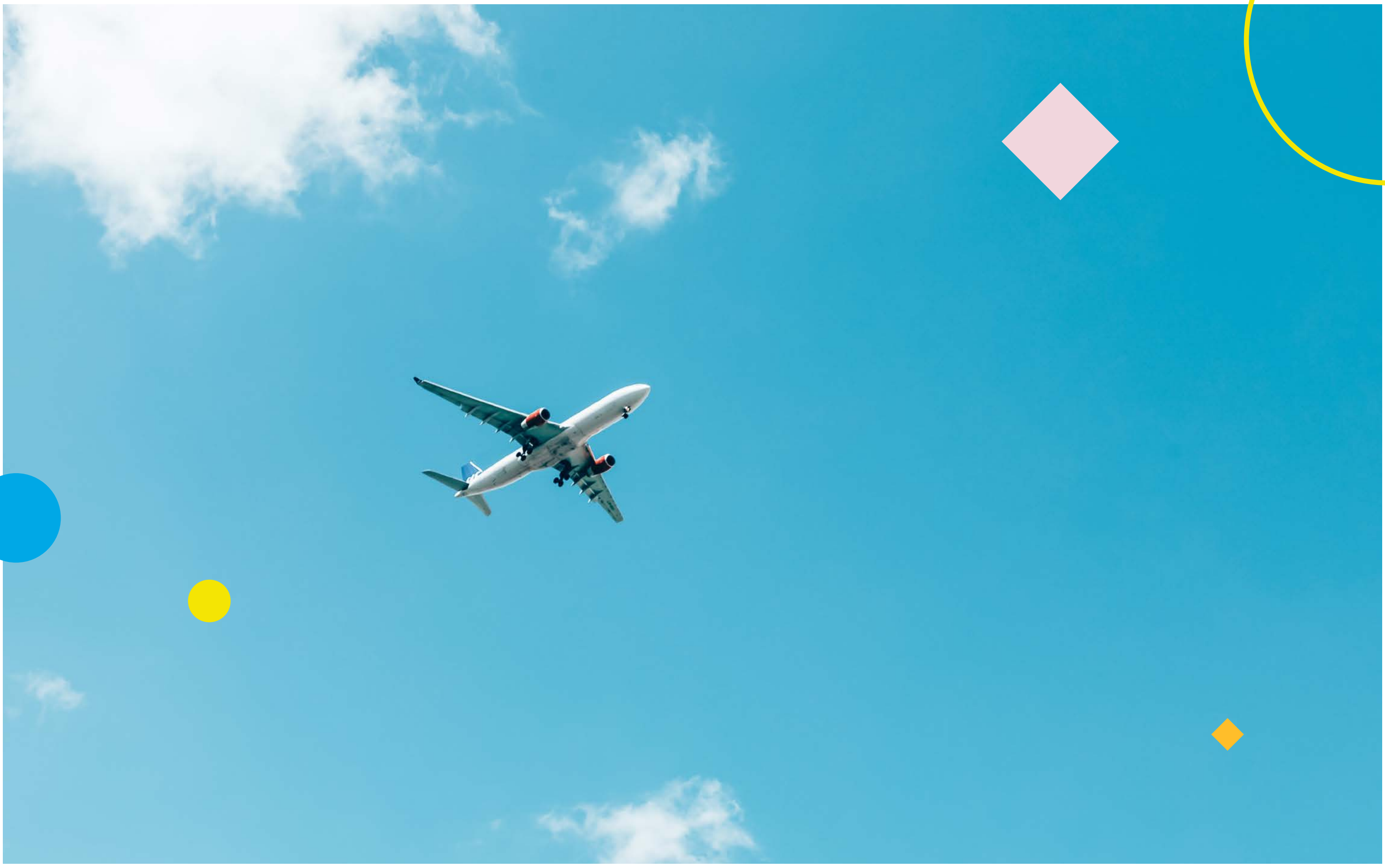
65%

Travel behaviours indicate a diverse use of transport modes. International air travel leads, used by 65% of respondents for business

The office continues to play a central role in the planning phase of business travel. With a large proportion of travellers booking transport and accommodation from the office, this provides advertisers with a valuable window to engage decision-makers within CBD and city-centre work environments.

When selecting transport modes, business travellers consider a range of influencing factors. Respondents ranked these in order of importance, offering insight into the priorities that shape their travel decisions.

[9] Q13: Which modes of transport do you regularly use for business travel? Base: 600. Multi-code question.



Air Travel

When it comes to air travel, convenience is king. Across key European markets, business travellers cite schedule flexibility (84%) as the leading factor when booking flights—closely followed by airline reputation (83%) and price (80%). While loyalty schemes remain part of the mix, frequent flyer points rank lower at just 53%. [10]

The journey to the airport highlights another layer of business travel behaviour. Most respondents favour a mix of car travel (68% using personal or company vehicles), and taxis or rideshares (62%). Rail is also a core part of the mix, with 66% arriving by train—split between airport express services (40%) and standard trains (26%). [11]

Inside the airport, premium experiences come into sharper focus. A majority of travellers (57%) access lounges for most or all short-haul flights, rising to 62% for long-haul. [12]

The premium trend continues in cabin class choices. Nearly half of all business travellers (49%) opt for Business or First Class on short-haul routes, increasing to 64% on long-haul journeys. [13]

84%

Across key European markets, business travellers cite schedule flexibility as the leading factor when booking flights

[10] Q14. Please select the top three factors that are most important to you when booking flights for business. Base: 474
[11] Q17. When travelling to the airport for business purposes, which of the following modes of transportation have you used in the last 12 months? Base: 474. Multi-code question.
[12] Q16: When travelling by air for business trips, do you use airport lounges? Base: 474
[13] Q15: When travelling by air for business, which class do you usually travel in? Base: 474

Train Travel

Comfort (66%), cost (65%), and speed (64%) continue to be the leading drivers when booking train travel, underscoring a pragmatic approach among business travellers. Loyalty or frequent traveller schemes remain a secondary consideration, with just 23% citing them as a key factor in their decision-making.[14]

When it comes to station access, patterns closely mirror those of air travel. A majority—59%—opt for a personal or company car to reach the train station, while 58% use taxis or rideshare options. [15]

Onboard preferences further reveal differences in travel style. While 53% of business travellers journey in standard economy, 46% choose First Class. [16]

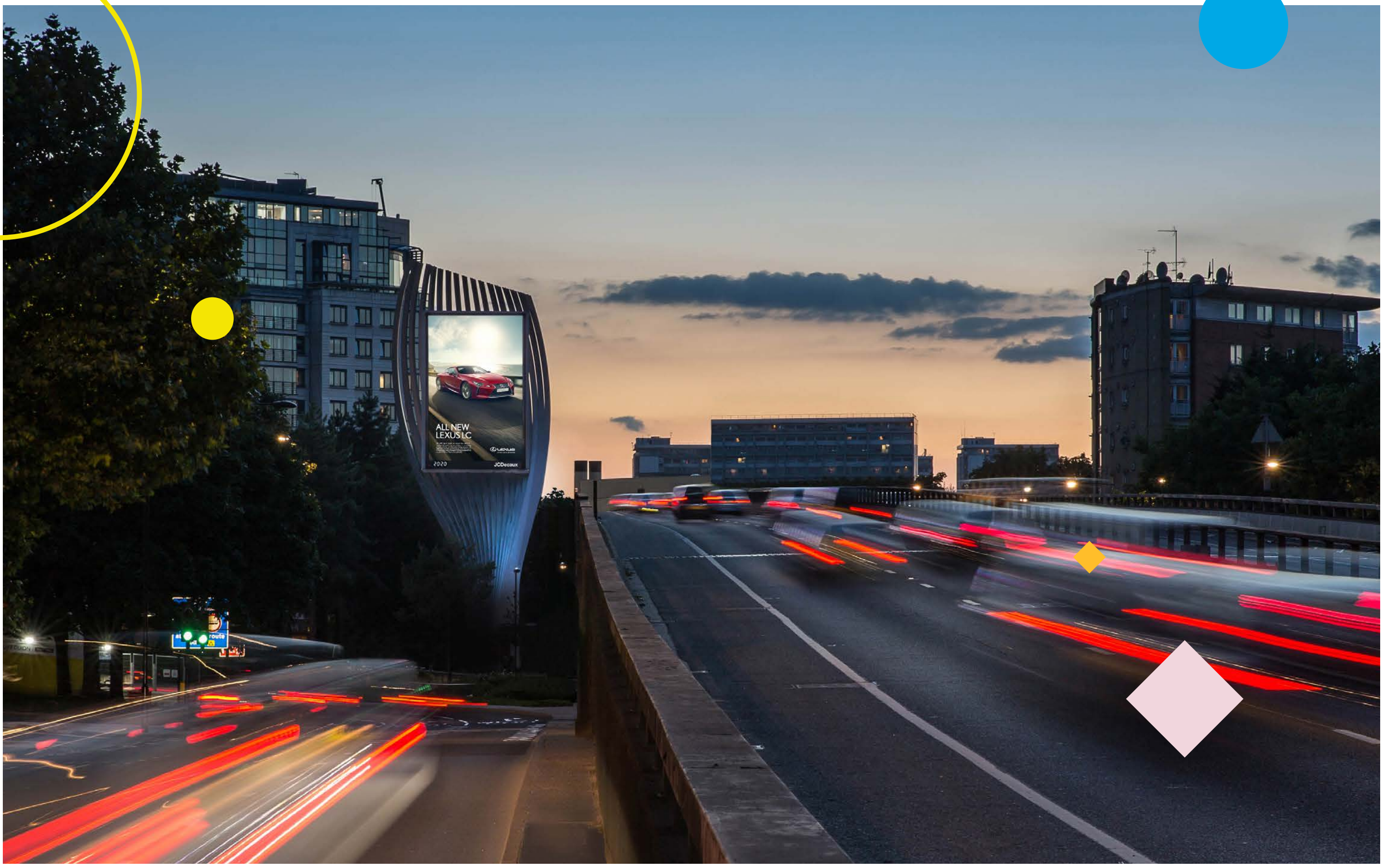
66%

Comfort continues to be the leading driver when booking train travel

[14] Q18. Please select the top three factors that are most important to you when booking trains for business. Base: 397
[15] Q20: When travelling by rail on business (not commuting), which of the following modes of transportation have you used to get to the DEPARTURE STATION in the last 12 months? Base: 397. Multi-code question.
[16] Q19: When travelling by train for business, which class do you usually travel in? Base: 397

Road Travel

Road travel remains a key mode of transport for business meetings, with 41% of respondents choosing to travel by road. Among this group, company-provided vehicles (61%) and personal cars (58%) are the most commonly used options. Additionally, 44% opt to rent a car, while 23% rely on ridesharing services to reach their destinations. [17]



Support services also play a significant role in the road travel ecosystem. More than half (56%) of road-travelling professionals receive a fuel card from their employer, while 45% participate in loyalty programmes with fuel or charging providers. A further 38% are members of rental car loyalty schemes. [18]

41%

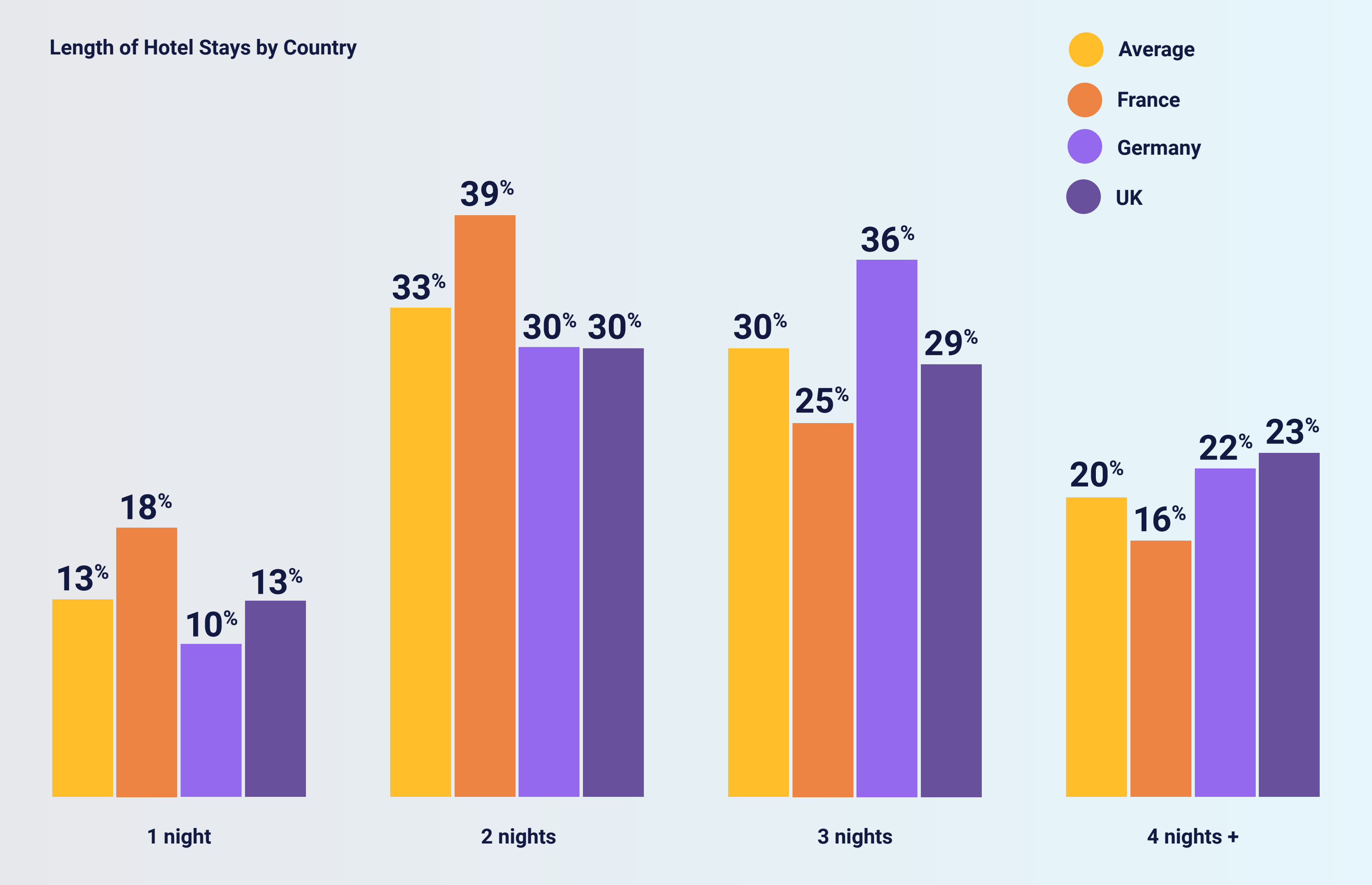
Road travel remains a key mode of transport for business meetings, with 41% of respondents choosing to travel by road

[17] Q21: When travelling by road for business, which of the following methods do you use? Base: 245. Multi-code question.
[18] Q22: When travelling by road for business, do you use any of the following cards or loyalty programmes? Base: 245. Multi-code question.

Hotels and Accommodation

When it comes to accommodation choices, location remains the top priority for business travellers, with 71% selecting it as their main consideration. Amenities follow closely at 62%, while price influences 59% of bookings. Loyalty programmes (22%) and sustainability practices (18%) rank lower in decision-making. [19]

Length of stay also varies across markets. Overall, most business trips span two (33%) or three nights (30%), with only 13% staying a single night and 20% booking four nights or more. [20]



Looking ahead, travel expectations are shifting, especially among senior professionals. Across markets, 35% of those at Director level and above foresee longer trips in the coming year, while 21% of middle managers say the same. A further 41% of senior leaders and 60% of middle managers anticipate no change in trip length.[21]

[19] Q24: Thinking about using hotels for business travel, what are the top three factors that are most important to you? Base: 575. Multi-code question.
[20] Q23: Thinking about your most recent business trip, how long was your hotel stay? Base: 600
[21] Q25: Over the next 12 months, how do you think the duration of your business trips will change compared to the past 12 months? Base: 600

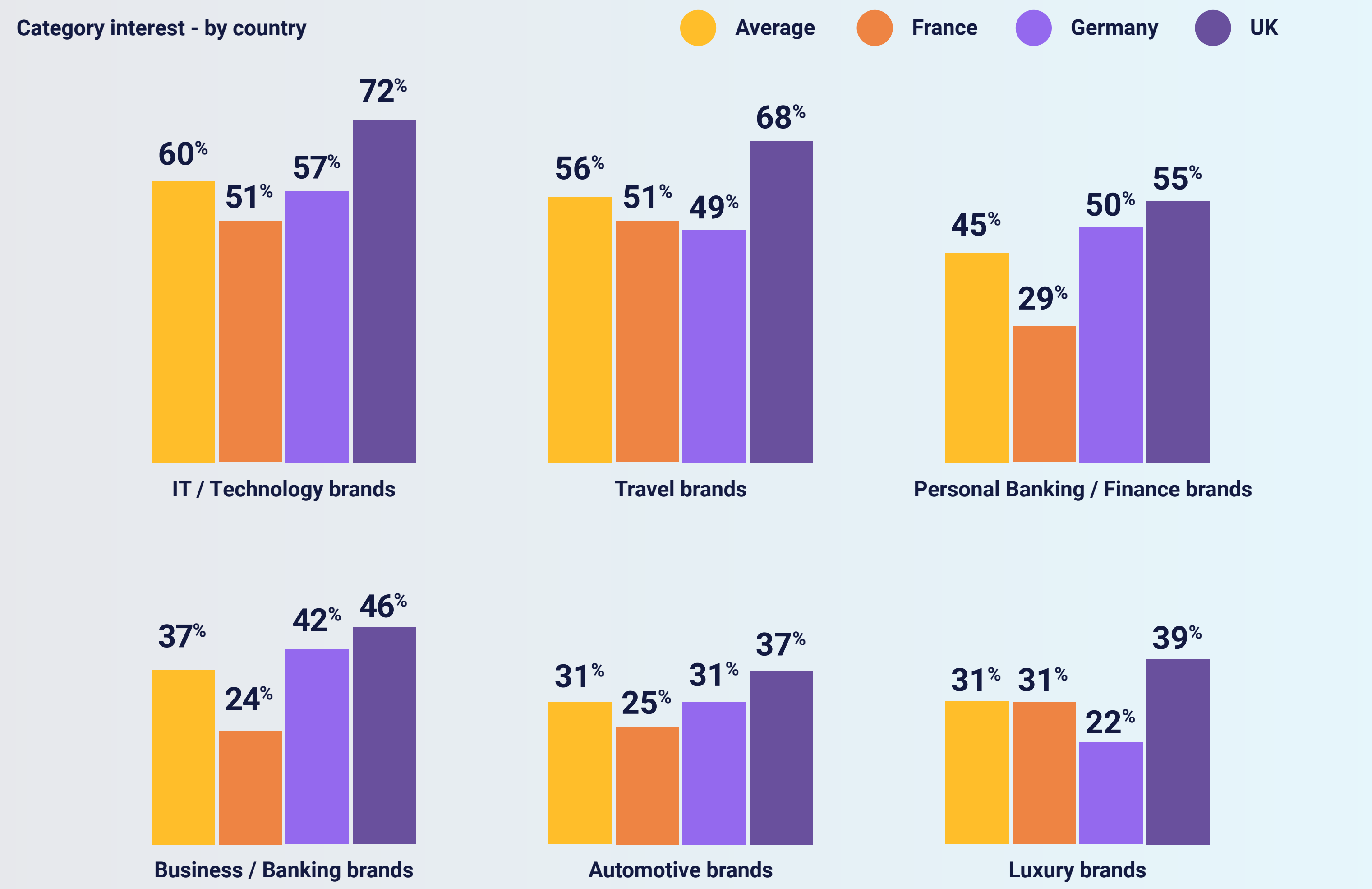
Leveraging pDOOH for Effective Business Audience Targeting

Programmatic digital out-of-home continues to transform how brands connect with business professionals. By harnessing real-time data on travel patterns, peak transit moments, and key audience demographics, advertisers can craft highly relevant, targeted messages that align with the interests and behaviours of today's mobile workforce.

Relevance, particularly in context, remains critical. An executive with prolonged dwell time at an airport may engage more readily with a luxury brand message, while that same individual could be more attuned to productivity-focused advertising when commuting by train. The ability to tailor messaging to specific environments ensures pDOOH campaigns resonate with business travellers at the right time and place.

Among business travellers, interest in IT and technology advertising is notably high. Sixty percent of respondents expressed a desire to see ads from this sector [22].

Interestingly, while 47% of those interested work in IT or technology, 53% come from other industries—highlighting the broader appeal of high-spec laptops and innovative software solutions across the business ecosystem.

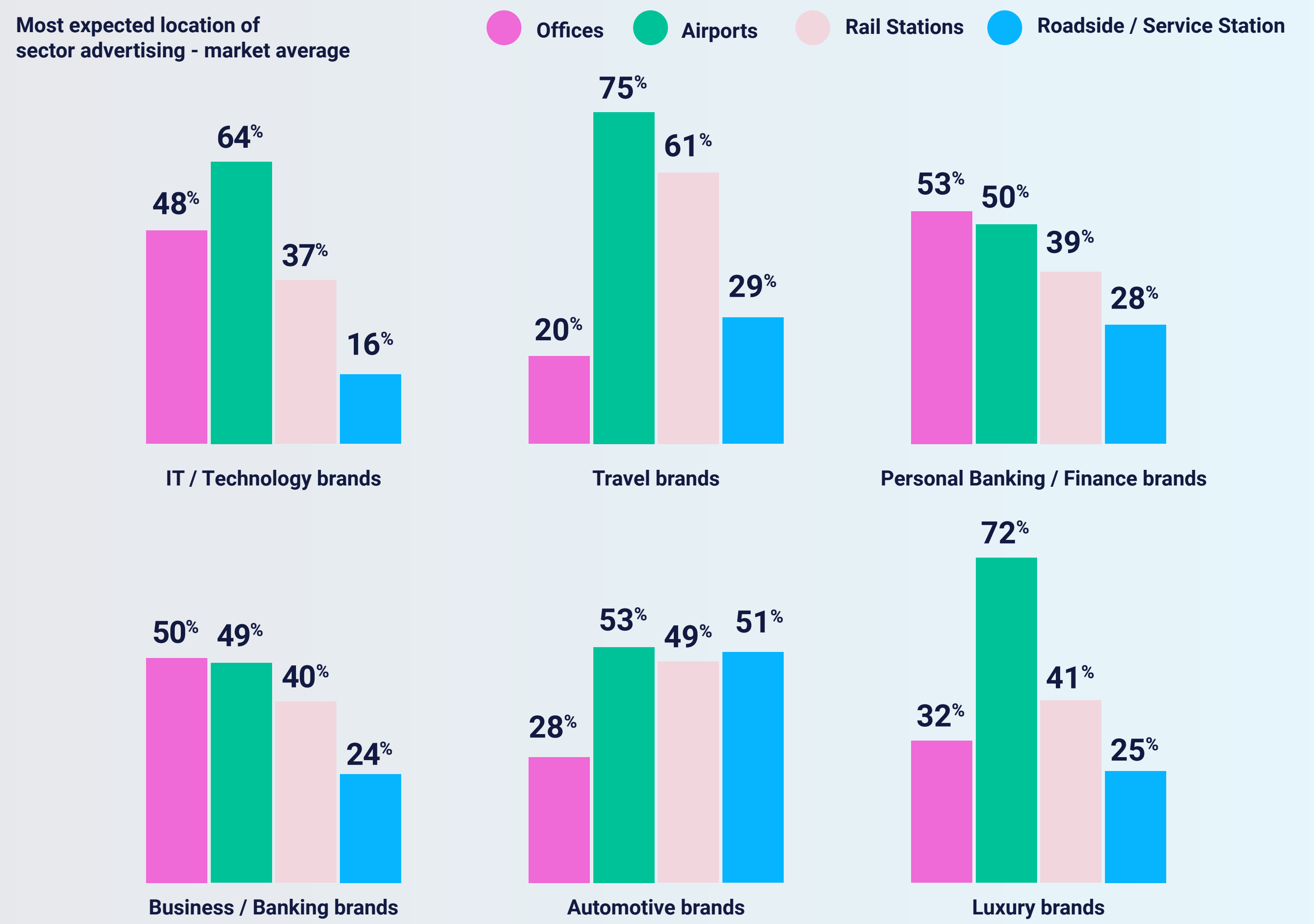


Airports were ranked as the most effective locations for reaching this audience (64%), with offices (48%) and rail stations (37%) following. Notably, UK respondents cited offices as the top location for this category (66%).[23]

[22] Q29: As a business professional, which of the following are you interested in seeing advertised? Base: 600. Multi-code question.
[23] Q30: As a business professional, where would you most expect to see the following sectors advertised? Base: 600. Multi-code question.

Finance also stands out as a strong vertical. Forty-five percent of respondents showed interest in personal banking and finance advertising, while 37% were drawn to business banking offerings. When it comes to ideal advertising environments for financial services, offices (53%) and airports (50%) emerged as the leading channels for personal banking, with similar patterns seen for business banking (offices 50%, airports 49%).

Automotive and luxury categories also capture attention, each appealing to 31% of business travellers overall. For luxury brands, airports were the most expected environment across France, Germany and the UK, followed by rail. Offices also featured, particularly in the UK, where 41% expected to see luxury advertising.



Business travellers actively looking for new productivity tools, software and both business and personal financial products are actually expecting to see advertising for such solutions in offices. Aligning this mindset with easy access devices means that ads can be actionable in real-time, without delay.

Conclusion

While business mobility remains a key advertising opportunity, the office - particularly in Central Business Districts — has become the most consistent and high-frequency environment for reaching this audience.

pDOOH screens in ground-floor office foyers offer advertisers unmatched visibility, attention, and contextual relevance — precisely when professionals are planning trips, making purchases, and engaging with productivity tools. This is the true starting point of the business traveller journey, and unlike more episodic travel (e.g. airports and stations) the office offers repeated, predictable impressions - ideal for brand recall priming and decision influencing.

As a result, premium indoor office environments are no longer just places of work — they are dynamic media ecosystems. For advertisers seeking to connect with today's influential and mobile professional class, city-centre offices should be a central focus.

Indoor office environments combine high purchase intent with trusted, contextually aligned messaging. In an era of hybrid work and shifting travel habits, the office stands out as the most frequent and effective setting to influence business travellers—before they plan, book, and go.

Appendices

Business Size Definitions

Large = 250+ employees
Medium = 50–249 employees
Small = 10–49 employees
Micro = 0–9 employee

Business Traveller Demographics

To build a representative picture, this research drew on a balanced sample of respondents across varying seniority levels, company sizes, and industry sectors. From C-suite leaders to middle managers, participants work in fields including IT and Technology, Construction, and Retail. While the majority are employed by medium to large companies with 50 or more employees (83%), the study also accounted for the business travel behaviours of those in small and micro-sized enterprises.

A significant 89% of respondents are employed full-time, with 4% working part-time and 7% identifying as self-employed or freelance. These figures point to a high degree of consistency in workplace engagement and travel frequency.

The education profile of this audience also reflects the calibre of modern business travellers. A strong 71% are educated to degree level—rising to 79% among respondents in France — while a further 15% hold a doctorate or equivalent professional qualification, increasing to 19% in Germany.

The Business Travel Landscape

59% of German business travellers forecast increased trips, followed by 56% in the UK. In France, however, only 34% expect their business travel to increase.

In the UK, 77% of C-Suite respondents expect to increase their travel, along with 72% of Directors and 43% of middle managers. Germany follows closely, with 75% of the C-Suite, 69% of Directors, and 43% of middle managers anticipating more trips. France sees more muted expectations: 47% of C-Suite executives, 40% of Directors, and just 26% of middle managers expect to travel more.

This sentiment is strongest in France, where 20% of middle managers expect to travel less, versus 16% in Germany and 11% in the UK.

In Germany, 63% of high-frequency travellers are employed by large firms, compared to 24% in medium businesses and 13% across both small and micro companies. France shows a more balanced distribution, with 44% from large businesses, 39% from medium, and 18% from small and micro enterprises. The UK, however, bucks the trend: here, 52% of frequent travellers work in medium-sized companies, ahead of 35% in large businesses and 13% in small/micro firms.

Appendices

The Role of Business Hubs and Co-Working Spaces

Co-working spaces and business hubs have long played a role in the professional landscape, but their appeal has grown markedly in the wake of the pandemic. As companies reassessed how and where work should take place, these flexible environments gained traction — offering a unique combination of dedicated workspaces and opportunities to engage with professionals from a wide range of industries.

While 53% of professionals travelling for business three or more times per month are based in city-centre offices, a significant 35% operate from business hubs and parks located outside the city centre. This figure drops sharply to just 7% for those working in suburban offices and business parks. Larger organisations are also more likely to maintain a central presence — 58% of companies with 250 or more employees are located in CBD or city-centre offices.

These findings highlight a clear trend: organisations with frequent business travellers are predominantly city-centre based. For advertisers, this underscores the effectiveness of targeting central business districts and office hubs when looking to engage high-value business audiences through out-of-home media.Regionally, Germany sees a slightly higher proportion of frequent business travellers based centrally, with 56% located in CBDs, compared to 52% in France and 49% in the UK.

The Business Traveller Journey - Key Touchpoints

In Germany, booking travel (58%) and accommodation (48%) from the office falls slightly below average, with home emerging as a stronger planning location. Conversely, office-based booking is more prevalent in France (69% for travel, 60% for accommodation) and the UK (68% and 58%, respectively).

Appendices

Air Travel

For UK professionals, convenience is a dominant priority, with 97% valuing the ability to align flights with their schedules. Cost (82%) and reputation (82%) also play critical roles. In France, price sensitivity stands out, with 87% prioritising cost — just ahead of reputation (83%) and convenience (79%).

Meanwhile, reputation leads the way for German travellers (83%), followed by schedule alignment (76%) and cost (72%). Notably, frequent flyer programmes carry more weight in Germany (67%) than in France (51%) or the UK (39%).

UK travellers show a particular preference for rideshares and taxis (75%), followed by private or company cars (73%). Airport express services are also more frequently used (44%), as are buses (33%)—a notably higher figure than in Germany (22%) or France (15%). German business travellers display similar car usage (74%) but a slightly lower preference for rideshares (59%). They also lead in using non-airport express trains (38%). In France, car travel (57%) and rideshares (53%) dominate, with moderate rail usage—33% via express services and 24% via non-express trains.

German professionals lead lounge engagement—with 64% using them for short haul and 67% for long haul travel. UK travellers follow closely (59% and 69%, respectively), while their French counterparts are less frequent users (49% short haul, 50% long haul).

UK travellers are the most likely to travel in premium classes —56% fly Business or First on short-haul, rising to 71% for longer trips. In Germany, 52% travel in premium classes on short haul and 66% on long haul. French travellers are more conservative, with 38% choosing Business or First for short haul and 53% for long haul.

Train Travel

Preferences vary by market. In the UK and Germany, speed leads as the top priority for rail travellers, with 71% and 63% respectively ranking it highest. In France, both price and comfort take equal precedence at 67%. Loyalty programmes hold limited sway, resonating with only 27% of French and German respondents, and even less so in the UK, where just 15% consider them influential. Notably, environmental concerns ranked low overall, with only 22% across all three markets selecting this as an issue.

German rail travellers drive this trend, with 69% using a car and 61% opting for taxi or rideshare. In the UK, ridesharing edges ahead: 63% of travellers use these services, compared to 60% who drive. In France, the gap is narrower, with 51% choosing taxis or rideshares, and 49% driving themselves or using a company vehicle.

Business travellers in France and the UK show a greater tendency toward premium rail travel, with 49% in both countries booking First Class—outpacing Germany, where 40% do the same.

Appendices

Road Travel

The preference for road travel varies slightly by market. In Germany, where 44% of business travellers commute to meetings by road, 64% use a company car, 56% use their own vehicle, 53% rent, and 20% engage ridesharing. In the UK, where 42% of business professionals travel by road, there is a stronger tendency to use personal vehicles (74%), ahead of 62% who use company cars, with 36% each renting or ridesharing. By contrast, road travel is less common among French professionals, with just 37% using this method. Among them, 55% drive a company car, 42% rent a car, 42% use their own vehicle, and 14% rely on ridesharing.

French professionals are the most likely to have a fuel card (72%), whereas UK travellers lead in loyalty scheme participation with fuel or charging providers, with 58% enrolled.

Hotels

In France, business travellers are particularly location-driven when it comes to accommodation, with 82% citing it as the key factor—well ahead of price (69%) and amenities (52%). Just 22% consider loyalty schemes, and a mere 6% factor in sustainability. UK professionals echo this trend, with 75% prioritising location, followed by amenities (65%) and price (55%). Interestingly, 24% of UK travellers identify sustainability as important, ahead of loyalty schemes at 14%. In Germany, amenities top the list (70%), with location (55%) and price (53%) close behind. Here, loyalty programmes gain more traction, influencing 28% of travellers, while 24% take sustainability into account.

German business leaders are the most likely to expect extended travel, with 43% predicting longer stays — higher than both the UK (38%) and France (20%). Among middle management, 35% in Germany expect trips to lengthen, compared to 29% in the UK and just 10% in France. Meanwhile, the majority of French professionals remain cautious about change. Over half (54%) of senior French travellers expect trip duration to stay the same, rising to 69% among middle managers. This sentiment is mirrored in the UK, where 41% of senior staff and 54% of middle managers expect consistency. In Germany, 32% of Directors and above and 51% of middle managers share this view.

With thanks to Aaron Witcher, Freelance Researcher

Appendices

Leveraging pDOOH for Effective Business Audience Targeting

Where business travellers would most expect to see the following sectors advertised[24]:

FR	IT / Technology brands	Travel brands	Personal Banking / Finance brands	Business / Banking brands	Automotive brands	Luxury brands
Offices	40%	20%	51%	49%	27%	25%
Airports	60%	76%	48%	51%	45%	74%
Rail stations	33%	57%	37%	34%	45%	40%
Roadside / Service station	13%	25%	25%	17%	52%	23%
None of these	7%	2%	9%	11%	7%	10%

DE	IT / Technology brands	Travel brands	Personal Banking / Finance brands	Business / Banking brands	Automotive brands	Luxury brands
Offices	39%	20%	48%	42%	27%	29%
Airports	71%	68%	51%	52%	60%	69%
Rail stations	39%	58%	42%	46%	53%	40%
Roadside / Service station	15%	24%	24%	28%	41%	23%
None of these	4%	3%	6%	7%	6%	10%

UK	IT / Technology brands	Travel brands	Personal Banking / Finance brands	Business / Banking brands	Automotive brands	Luxury brands
Offices	66%	21%	60%	60%	30%	41%
Airports	62%	82%	50%	46%	54%	75%
Rail stations	41%	69%	38%	42%	50%	42%
Roadside / Service station	22%	38%	34%	29%	61%	29%
None of these	4%	2%	10%	10%	6%	9%

[24] Q30: As a business professional, where would you most expect to see the following sectors advertised? Base: 600. Multi-code question.