



WAKEFIELD

Global Business Travelers Report

July 2022

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SAP Concur 

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Executive Summary



Nearly all business travelers are willing to travel this year, yet the way companies are managing the return to travel may prove problematic. **Most business travelers report their companies are returning to pre-pandemic travel levels but are spreading it among fewer employees, an approach that leaves the majority unhappy with their travel frequency.**

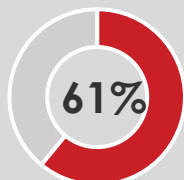
And while most of those traveling too little are willing to wait for things to improve, **many who are on the road more than they'd like are ready to bring about the change themselves – even if that means a change of employers.** But recruiting these eager travelers will come at a cost during this era of intense labor competition, as nearly all want extra perks to take a job requiring more travel.

Meeting business travelers' expectations is likely the better option for companies, which includes ensuring their travel schedules meet needs as well as offering the travel flexibility they deem essential. Business travelers are focused on safeguarding their well-being amid lingering COVID-19 health and safety concerns. Sustainable travel continues to be a key consideration for business travelers as well, offering an additional opportunity for employers to cater to employees' travel requirements.

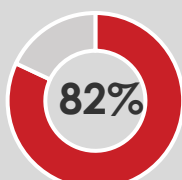
These findings come from a survey of 3,850 business travelers across 25 global markets commissioned by SAP Concur through Wakefield Research.

Key Findings

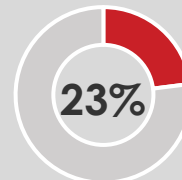
Current State of Business Travel



of business travelers say their current travel schedule doesn't match expectations

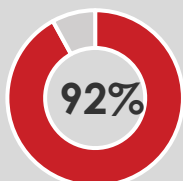


feel their company is returning to pre-pandemic levels of travel with a "more travel on fewer shoulders" approach

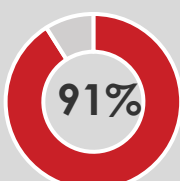


who aren't traveling at their ideal frequency will search for a new position if their company's business travel continues at its current pace

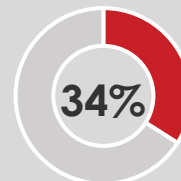
Traveler Expectations



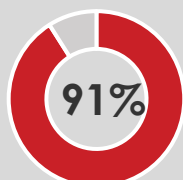
would require additional salary, benefits or travel flexibility to take a position with more travel



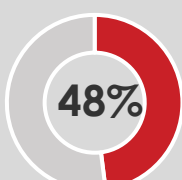
are willing to decline a business trip assigned to them



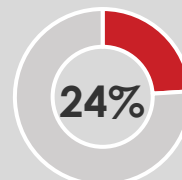
see health and safety concerns from COVID-19 as the top threat to business travel



have travel flexibility expectations they see as essential for ensuring their health and safety while traveling



say having sustainability information for each travel option when booking business travel is very or extremely important



would decline a business trip if it required using non-sustainable travel options

Business Travelers

Travel Frequency a Sore Spot for Many

As the level of business travel continues to return to more familiar territory, business travelers are dissatisfied with the direction of their company's travel plans. In fact, **3 in 5 business travelers (61%) report their current travel frequency is not meeting their expectations.**

The vast majority (82%) say a change in corporate travel direction is to blame, reporting their company is returning to pre-pandemic levels but with a “more travel on fewer shoulders” approach, utilizing a smaller group of travelers. There are regional differences, though, as 88% of business travelers in APAC and 86% of those in the Americas agree that this is the new approach at their company, while fewer (75%) see this in Europe.

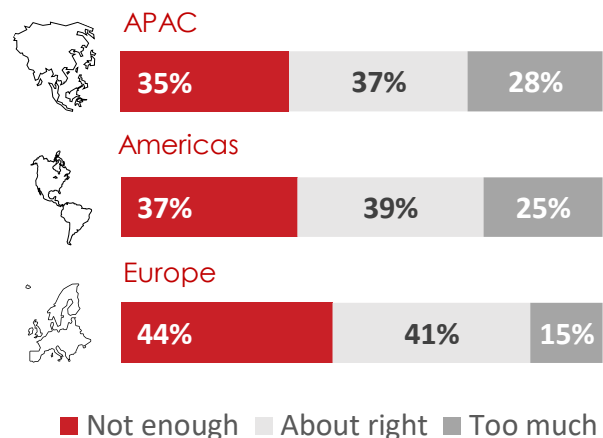
Travelers Unhappy with Schedule



3 in 5 business travelers are unhappy with their current travel frequency

In the wake of the pandemic that has reshaped attitudes about business travel, it is more important than ever for companies to find the appropriate level of travel for individuals. **Nearly 2 in 5 business travelers (39%) want to travel more while 22% want to travel less.**

Balance of Travel Varies by Region



Those in Europe are particularly likely to be traveling less than they desire (44%), compared to those in the Americas (37%) and APAC (35%). Likewise, travelers in APAC (28%) and the Americas (25%) are more likely than those in Europe (15%) to report traveling more than they prefer right now.

Travelers Poised to Act if Change Doesn't Happen

A significant number of business travelers have made clear the consequences of companies not striking the right balance – they'll look for other opportunities. **Nearly 1 in 4 business travelers who are not traveling at their ideal frequency (23%) say they'll look for a new position if their travel schedule doesn't improve.**

It's notable that those currently traveling more than they'd like are also the most willing to look elsewhere if their load isn't lightened. **Fully 3 in 10 business travelers who are traveling more than they'd prefer**

right now (30%) say they'll search for a new position if the schedule doesn't change – double the amount that will simply ask to reduce the travel in their current position (15%).

In contrast, those who are traveling less than they'd like are looking to take less drastic steps. Just 20% of those traveling less than they'd prefer will look for a new position if things don't change. Instead, more than 1 in 4 of these business travelers (27%) will ask to increase the travel in their current position.

Travelers Expect Perks to Leave

Larger salary and/or a bonus

59%

Higher category travel options

40%

Additional vacation time

39%

Ability to work from home

37%

Ability to book directly on supplier sites

31%

Hiring new talent to fill the positions vacated by those willing to walk won't be easy, either. Aware of the labor market, **travelers aren't willing to accept a position that requires more travel without added perks: 92% say they'd need additional salary, benefits, or travel flexibility.**

While **nearly 3 in 5 (59%) would want a larger salary and/or bonus to take a position that requires more travel than their current one**, others could be attracted by benefits to make their work

Higher Category Travel Options



APAC

48%



Americas

44%



Europe

32%

more enjoyable. Nearly 2 in 5 business travelers (39%) would need additional vacation time, and nearly as many (37%) want the ability to work from home as a lure. Additional vacation time would be of particular interest for business travelers in APAC, where 44% say this could attract them to a position with more travel.

Business travelers also want options to make travel more relaxing and scheduling less stressful. A full 2 in 5 business travelers (40%) say they'd want the ability to choose higher category transportation and accommodation options to take a position with more travel, and 3 in 10 (31%) want the ability to book their travel directly on supplier websites. Booking higher category travel options is of particular interest to travelers in APAC (48%) and the Americas (44%), while fewer business travelers in Europe (32%) would be tempted by this option.

More equitable distribution of travel on the front end can also minimize the need for last-minute reassignments as travelers flex their empowerment muscles. **The vast majority (91%) are willing to decline a business trip, with more than a quarter (26%) willing to pass on an assigned trip if they're feeling burnt out with travel** and need a break. APAC travelers are most likely to do so (30%, compared to 25% in Europe and 23% in the Americas).

High-Level Concerns

Even executive-level business travelers are ready to search for a new position if their travel schedule doesn't improve. **More than 1 in 4 executive-level business travelers who are not happy with their current level of travel (27%) say they're likely to move on if no progress is made**, compared to 21% of other business travelers unhappy with their travel schedules.

But successfully attracting these executives to positions requiring additional travel may take more than higher salaries and bonuses. In fact, little more than half of executive-level business travelers would take a position with more travel based on this perk (51%), compared to about 2 in 3 business travelers not in executive-level positions (64%).

Safety Still a Top Concern

Health and safety concerns from COVID-19 are viewed as the top threat to business travel by more than 1 in 3 business travelers (34%) – more than double the next most common top concern, which is rising oil prices and inflation (14%). COVID-19 concerns are even higher in APAC, where nearly half of business travelers (47%) selected it as the top threat to business travel, compared to more than 1 in 3 business travelers in the Americas (35%) and less than a quarter of those in Europe (23%).

The lingering health and safety concerns are also likely fueling perspectives on the most stressful stages of traveling. Nearly 2 in 5 business travelers (38%) say during the trip is now the most stressful stage of

COVID-19 Concern is High in APAC



travel, including ensuring their personal safety and health – a 7-point increase from the 31% of business travelers who said this in 2021.

Most business travelers are unwilling to take unnecessary risks that would jeopardize their wellbeing. **Over half of business travelers (51%) would decline a business trip their company assigns if they have COVID-19 related health concerns about the trip.** This is particularly true of business travelers in APAC (60%) and the Americas (52%) but less so of travelers in Europe (42%).

In addition, **business travelers continue to expect flexible travel and booking options to protect their health and safety while traveling, expectations which remain largely unchanged from 2021.**

Over 2 in 5 say protecting their health and safety means allowing them to select their preferred mode of travel (45%) and accommodations (44%).

For Many, Safety Means Flexibility

Selecting preferred mode of travel

45%

Selecting preferred accommodations

44%

Deciding how long the trip will be

38%

Changing travel plans without repercussions

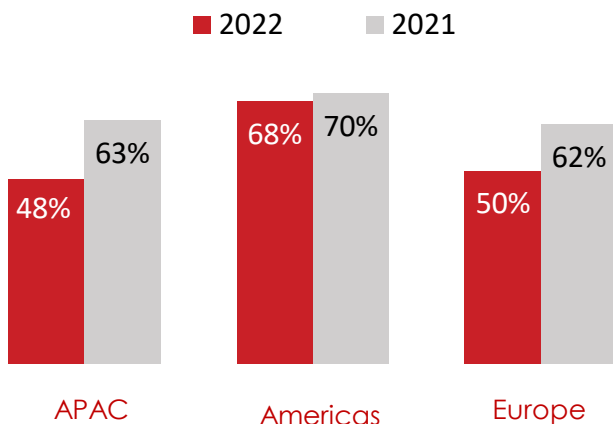
36%

Having more control over the trip's schedule is critical as well. **Nearly 2 in 5 business travelers deem it essential that their company allow them to decide how long their trip will be (38%) and change travel plans without repercussions (36%) to ensure their health and safety while on the road.** A similar percentage (37%) expect the ability to book travel directly through supplier websites to protect their health and safety.

Interest in Travel High, Despite Concerns

Overall willingness to travel is on par with last year at 98%, though the percentage who say they are very willing to do so has declined from 65% in 2021 to 55% this year. Business travelers in the Americas remain similarly likely to say they are very willing to travel – 68% this year compared to 70% last year, while those in other regions are less eager this year than last. In APAC, the percentage who are very willing to travel has dropped 15 percentage points, from 63% last year to 48% this year. Similarly, in Europe the percentage who are very willing has dropped 12 percentage points, from 62% last year to 50% this year.

Outside of the Americas, Fewer are Very Willing to Travel This Year



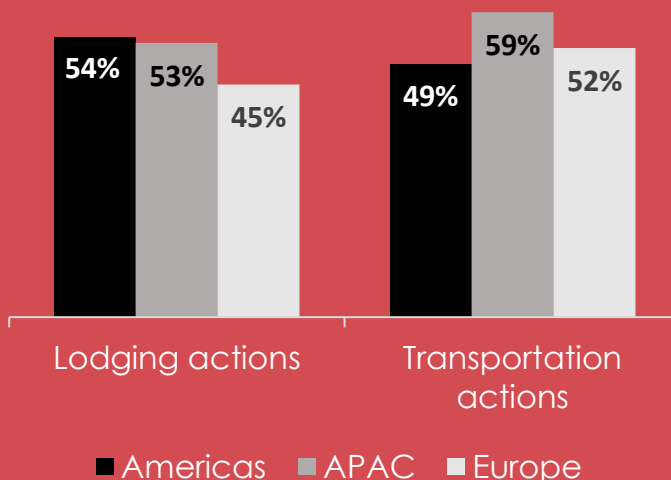
Nearly all (96%) are eager to reclaim the advantages of travel this year. This includes the personal benefits to be gained through business travel, such as experiencing new places and cultures (44%), going out to nice dinners and events (39%), and simply taking a break from everyday life (34%). Travelers are also eager to restore aspects beneficial to their business, including the relationship-building opportunities of in-person connections (46%) and the productivity of in-person meetings (41%).

Business Travelers Driving Sustainability Push

Nearly all business travelers (94%) are looking to take their own steps to ensure greener travel over the next 12 months, and it seems those from APAC and the Americas – where sustainability has historically been less emphasized than in Europe – may be looking to catch up with their European peers.

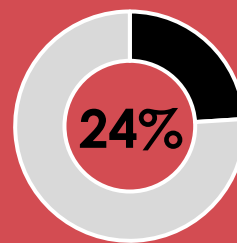
Those in the Americas (54%) and APAC (53%) are even more willing to take lodging-related actions for the sake of sustainability than those in Europe (45%). Those in APAC (59%) are more likely to make transportation related changes than travelers in Europe (52%) and the Americas (49%). The lower intention among those in Europe to take these steps may also be a result of policies in the region, such as the European Green Deal, that require travel to meet a minimum level of sustainability.

Regional Differences in Personal Sustainability Intentions



Some business travelers are even willing to risk the consequences of refusing non-sustainable travel: **nearly 1 in 4 business travelers (24%) would decline a business trip assigned to them by their company if it required using non-sustainable travel options.**

Some Willing to Take a Bold Stand



Would **decline a business trip** assigned to them if it required **using non-sustainable travel options**

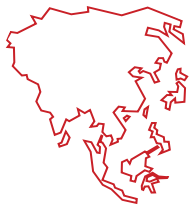
And while they're making personal strides toward more sustainable travel, most are looking to their companies to help. Having sustainability information for their travel options is important to nearly all business travelers (94%). And it's not just a minor concern, as **nearly half (48%) say having visual indicators of the environmental impacts is very or extremely important.** Europeans are notably less likely to say this, at 36%, compared to 54% in APAC and 57% in the Americas. This is particularly true of European travelers who travel only within their home country (28%) or who stay within the region (32%), compared to those who travel outside of Europe (42%) where sustainable measures may be less common.

Conclusion

Business travelers are clearly demonstrating a desire to redistribute travel more evenly among travelers and a willingness to take steps to redress the issue if companies don't act.

But travelers are also interested in safety as well as perks that could make their trips more enjoyable. And with rising interest in sustainable travel, measures to help their travel better align with their environmental values are another important request. **Willingness to reconsider policies on how travel is distributed and to heed travelers' desire for continued flexibility to ensure their health and safety will be required for companies who want to keep their business traveler fleet steady as they return to pre-pandemic levels of travel.**

These key regional overviews can help companies as they work to address the needs business travelers described:



Business travelers in the APAC region remain very concerned about the continued health and safety threats from COVID-19, something which companies operating in this region will need to keep in mind as they consider when and how to enact changes to travel policies. **Many travelers in APAC are also burnt out**, requesting more vacation time as a benefit for a position with more travel and being more likely to refuse an assigned trip because they were burnt out and needed a break. Making this refusal unnecessary by offering additional vacation time, particularly for those with higher frequency travel schedules, may help to retain these important employees.



European business travelers are most likely to want to travel more than their current schedules permit and would require fewer perks to attract them to a position with more travel. Simply offering more travel opportunities may be the best way to boost these travelers' satisfaction levels.



Business travelers in the Americas are the most willing to travel, though they see the “fewer travel on more shoulders” trend and aren't happy with current schedules. Offering higher category travel options and more accessible sustainability information may be the most effective perks to entice these travelers to remain in their current roles.

Methodological Notes

The SAP Concur Survey - Business Travelers was conducted by Wakefield Research (www.wakefieldresearch.com) between April 28th and May 23rd, 2022, among 3,850 Business Travelers, defined as those who traveled for business 3+ times in the past 24 months, in 25 markets: US, Canada, Brazil, Mexico, LAC (Colombia, Chile, Peru, and Argentina), UK, France, Germany, ANZ region (Australia and New Zealand), SEA region (Singapore and Malaysia), China, Hong Kong, Taiwan, Japan, India, Korea, Italy, Spain, Dubai, Benelux (Belgium, Netherlands, and Luxembourg), South Africa, Sweden, Denmark, Norway, and Finland. Data has been weighted to facilitate tracking.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 1.6 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

The SAP Concur Survey - Travel Managers was conducted by Wakefield Research (www.wakefieldresearch.com) between April 28th and May 23rd, 2022, among 700 Travel Managers, defined as those who direct or administer travel programs for businesses, across 7 markets: France, Germany, Hong Kong, Mexico, SEA Countries (Malaysia and Singapore), UK, and US. Data has been weighted to facilitate tracking.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 3.7 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.



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