



Sponsored by SAP



GLOBAL BUSINESS TRAVELER REPORT

JUNE 2021

EXECUTIVE SUMMARY

Business travelers entering the post-pandemic era overwhelmingly want to return to business travel, regardless of where in the world they work, company size, or their generation. They believe business will suffer if their company does not increase business travel in the next year, including concerns about being able to sign new deals or renew contracts with existing customers. However, in order to feel comfortable on the road, they expect increased flexibility from their company. Employers may now be moving into uncharted territory.

For insight, **SAP Concur organization surveyed 3,850 business travelers in 25 global markets** to determine the best strategy to bridge the gap between the needs of today's business travelers and pre-pandemic travel norms.



96% of business travelers are willing to travel this year.



KEY FINDINGS



96% are willing to travel in the next 12 months.



52% expect freedom to book direct flights.



80% worry that the inability to travel will hurt them personally and professionally.



69% want to loosen travel policy restrictions or return to pre-COVID-19 policy.



68% clearly state that they want to return to business travel on their own terms.



31% would ask to limit their travel if their company does not amend its travel policies.



72% rank flexibility as the top driver for business travel.



42% hold themselves most responsible for their health and safety on a trip.



If travel doesn't increase, **33%** worry they can't advance in their careers and **18%** worry they will lose their job.

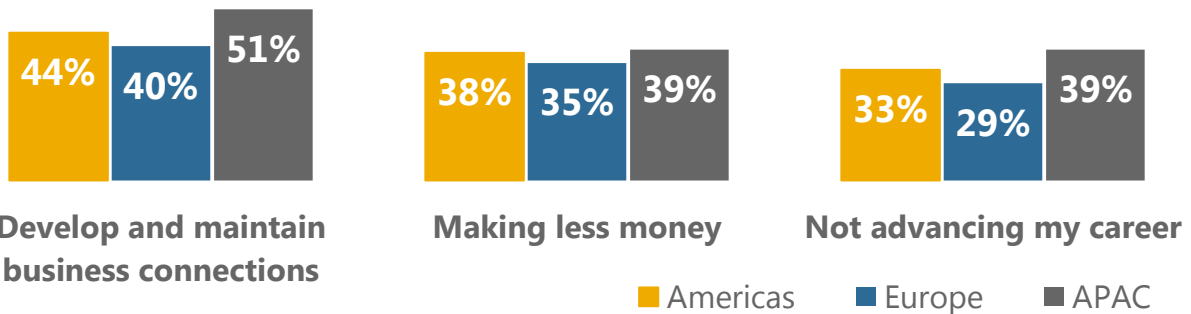


Getting Travel Back on Track is Critical

The COVID-19 pandemic brought business travel to a halt but also highlighted the major role that trips play in the lives of business travelers. In fact, **80% worry the inability to increase business travel will affect them personally**. For many, business travel is inextricably tied to their career success and fulfillment. **Their personal career concerns include difficulty developing and maintaining business connections (45%), making less money (38%) and not advancing in their career (33%)**. Nearly 1 in 5 (18%) worry they will lose their job, and for **very frequent business travelers (16+ trips a year)**, that number goes up to nearly 1 in 4 (24%).

Worldwide Worry

APAC Travelers Are Most Concerned About Staying Grounded



After a fraught year, this desire to travel for work is not stemming from a sense of duty or tempered by apprehension – business travelers want to get back on the road. **More than two-thirds of business travelers (68%) best sum up their view on travel as a desire to travel for work, rather than their company insisting.**

This is largely tied to the fact that they view their trips as opportunities to strengthen business relationships and broaden their horizons. **A majority want to make personal connections with customers and colleagues (54%) as well as experience new places (52%).**

More than 2 in 3 business travelers say **they** are driving the return to the road – not their company.



If there ever was a question about the existence of pent-up demand for getting back on the road, business travelers have resoundingly put it to rest.

Nearly all business travelers (96%) are willing to travel for business over the next 12 months, including about 2 in 3 (65%) who are very willing to travel.



Flexibility is the Future

Companies today have to recognize that the pandemic has reshaped the mindset of business travelers and they must be prepared to meet these new needs. In key departure from the narrative of the previous year, **72% of business travelers rank flexibility as a top-consideration for business travel, well ahead of vaccination- related demands at 62%.**

From planning through the completion of their trips, business travelers are looking for more logistical leeway. **The more essential perks for business travel include allowing travelers to select their preferred accommodations (46%) and mode of travel (43%).**

Findings suggest that structured policies aren't an issue for business travelers — provided those policies are up to date. **Those whose company has a mandated travel policy (42%) or guidelines (39%) are more likely to value the ability to book travel directly on supplier websites.**

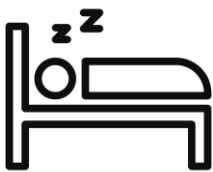
On The Web

Travelers at Companies With Mandated Policies or Guidelines More Likely to Value Ability to Book Travel Directly on Supplier Websites



As COVID-19 has shown, travel-related circumstances can quickly change and travelers anticipate the need to be nimble. **Almost all business travelers (92%) expect changes to their travel routine including more frequently staying in larger hotels (36%), using a personal vehicle instead of public transportation (35%) and prioritizing domestic trips (33%).** Further, over 3 in 5 (63%) expect to engage in more sustainable practices, such as prioritizing trips with shorter distances (32%), avoiding layovers (31%) and prioritizing alternatives to air travel (26%).

92% expect changes to their travel routine, including...



36% will stay in larger hotels



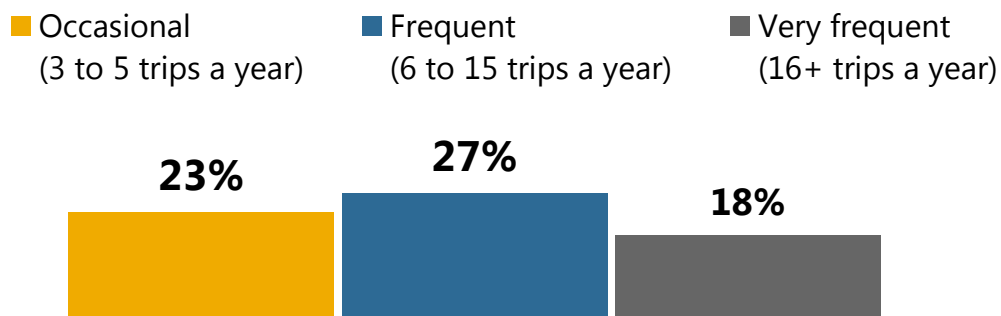
35% will use a personal vehicle instead of public transportation



33% will prioritize domestic trips

Flexibility while traveling for business also gives travelers an opportunity to make the most of their time away. **About 9 in 10 business travelers (89%) will add personal vacation time to their business trips in the next 12 months.** Of those, they plan to add vacation time to 25% of their business trips in the next 12 months.

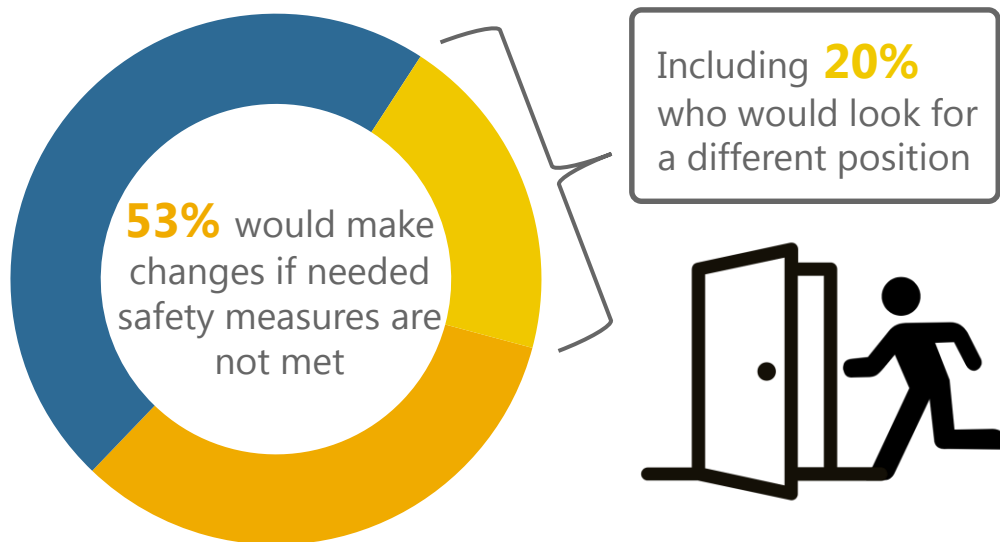
The Bleisure Bump: Business travelers who don't travel quite as much are even more eager to make the most of it...



Travelers Adding Vacation Time to 26%-50% of Trips

Inadequate Response Can Prove Costly

Companies that fail to accommodate their business travelers risk paying the price down the line. **More than half (53%) of business travelers would make changes if their company doesn't provide the necessary policies or measures to protect their health and safety**, including nearly a third (31%) who would ask to limit their travel and 20% who would look for a different position.



While retention issues are a significant concern (22%), business travelers see a failure to resume travel as a risk to the company's bottom line. **The vast majority (80%) have concerns if their company does not increase business travel in the next 12 months.** Their broad concern is not being able to effectively generate business. **Specifically, they report it will be more difficult without increased travel to build new relationships (38%), sign new deals (37%) and renew contracts with existing clients (34%).** In fact, many doubt their company will have a future at all without increased travel. **One in 7 (14%) business travelers are afraid their business will shut down.**

80% have concerns if business travel doesn't increase, including...



38% building new relationships



37% signing new deals



34% renewing contracts



14% going out of business

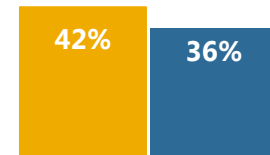
Meet Business Travelers Where They Are

Business travelers are indicating that business as usual won't fly. **More than 2 in 3 (68%) business travelers do not want their company to return to pre-COVID-19 policy.** Nearly 2 in 5 (37%) expect their company to adjust by allowing modifications to policies for health and safety.

Flexible travel policies will allow business travelers to take even greater ownership of their well-being on trips. Last year, 36% of business travelers held themselves most accountable for their health and safety on a trip and 10% held their company's travel management company (TMC) most accountable. **Now, over 2 in 5 (42%) business travelers hold themselves most responsible,** followed by their employer (22%) and their company's travel agency/TMC (15%).

Most Accountable for Travel Safety

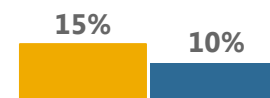
2021 2020



Myself



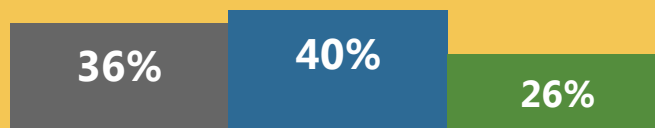
Employer



Travel Agency/TMC

TRAVEL POLICIES

■ Mandated Policy ■ Guidelines ■ No Written Policy



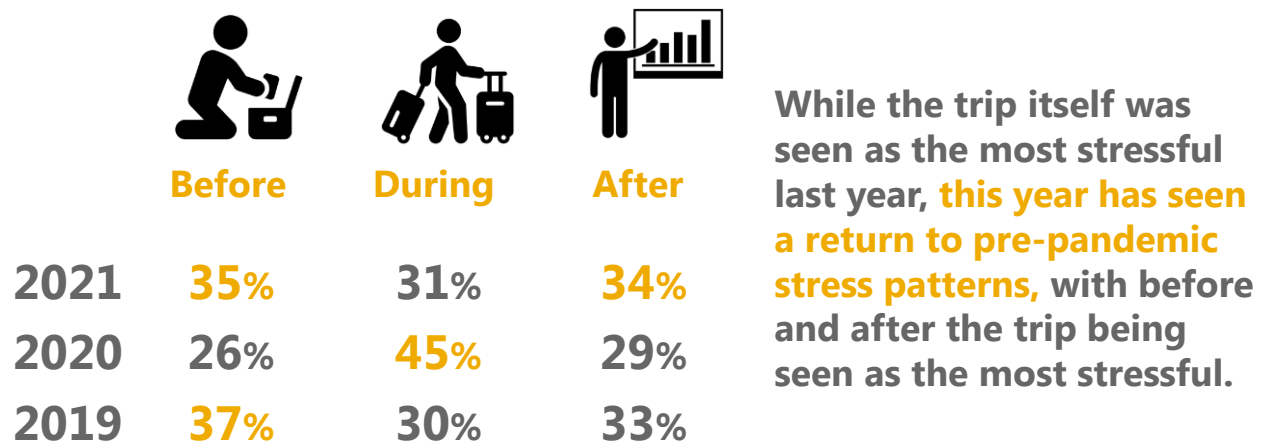
Travelers Who Want Looser Restrictions on Company Travel Policy

Business travelers with guidelines (40%) or mandated policies (36%) are more likely to want looser restrictions, compared to those whose company has no written policy (26%). With greater flexibility, they'd stay at larger hotels (37% and 38%, respectively vs. 24%) and take trips closer to home (32% and 34% vs. 23%).

But not having written policy at all, leaves business travelers in a state of uncertainty. They are more likely to assume responsibility for their well-being on trips (38% mandated and 41% guidelines vs. 57% no policy) yet don't consider changing travel plans without repercussions essential (25% vs. 34% and 39%). They are also least likely to be concerned that a lack of increase in travel will make it difficult to retain employees (15% no policy vs. 21% guidelines and 26% mandated).

That business travelers want more control over their travel is also reflected in their concern about the planning and post-trip stages. In a significant shift, the trip itself is no longer the most stressful stage (31% this year vs. 45% last year). This year, business travelers reported before the trip (35%) and after (34%) as the most stressful. That aligns with 2019 findings where 37% cited before the trip as most stressful, followed by after the trip (33%) and the trip itself (30%).

Most Stressful Stage of a Business Trip



Having a more defined travel policy signals a commitment to care for business travelers. **Those whose company has a mandated travel policy (23%) or written guidelines (23%) are more likely than those whose company has no written policy (15%) to hold their employer most accountable for their health and safety on a trip.**

Conclusion

Business travelers across the board are united in their desire to get back on the road, fearing their companies' futures will be jeopardized if business travel isn't increased over the next year. The potential negative impacts include fewer new deals signed and fewer contract renewals.

However, travelers report company policy and guidelines must be amended to increase travel as well as ensure a commitment to responsible travel. The key, is providing them flexibility in managing their trips.

Failure to adjust to the new business travel environment can turn travel issues into talent management matters. Travelers are concerned about the prospect of making less money, not advancing in their career, and losing their job if travel does not pick up.

Travelers understand they are best positioned to take care of themselves on the road and want to be empowered to do so. Forward-thinking companies will succeed by upgrading their travel programs to provide the tools that serve the needs of employees while advancing business objectives.



ABOUT WAKEFIELD RESEARCH

Wakefield Research is a leading, independent provider of quantitative, qualitative, and hybrid market research and market intelligence. Wakefield Research supports the world's most prominent brands and agencies, including 50 of the Fortune 100, in 90 countries. Our work is regularly featured in media.

To learn more, visit: www.wakefieldresearch.com

For additional insights from prior studies, visit: [Global Business Traveler Report 2020](#)

[Business Traveler Report 2019](#)



METHODOLOGICAL NOTES

The SAP Concur Survey – Business Travelers was conducted by Wakefield Research between April 15th and May 10th, 2021, among 3,850 Business Travelers 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. The data has been weighted to ensure reliable representation of the business traveler population in each market. The overall margin of error for this study is +/- 1.6 at the overall level, at 95% confidence.

The SAP Concur Survey – Travel Managers was conducted by Wakefield Research between April 15th and May 10th, 2021, among 700 Traveler Managers in 7 Markets including US, Mexico, UK, France, Germany, SEA region (Singapore, Malaysia) and Hong Kong. The overall margin of error for this study is +/- 3.7 at the overall level, at 95% confidence.



SPONSORED BY:

SAP Concur 



WAKEFIELDRESEARCH.COM