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Global Business Travelers Report

May 2023

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Global Business Travelers

Executive Summary

Today's business travelers are eager to travel and recognize the importance of doing so for both their companies and their careers. **Yet travelers' desire and need for flexibility and companies' current policies concerning travel frequency, duration, and destinations are not always aligned.** Travelers are understandably concerned for their own health and safety, including the ability to maintain an acceptable work-life balance, as well as voicing broader concerns around the environmental impacts of travel and the social and cultural circumstances in various destinations.
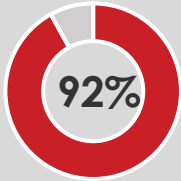
More than 9 in 10 business travelers (91%) are willing to decline an assigned trip that conflicts with these needs, values, and preferences. **What's more, nearly all business travelers with a formal corporate travel policy (91%) expect their company to allow the flexibility to book travel outside of company policy in cases where policy may conflict with their needs or values.** This is so important that nearly 3 in 10 business travelers (28%) would turn down a business trip that lacks the flexibility to make adjustments outside of company policy.

These decisions to take a hard line are not made lightly, however. Business travelers consider travel critical to their careers, essential to maintaining important relationships, and imperative for aiding employee advancement. Yet such travel is becoming increasingly expensive and fraught with cancellations and delays that may require companies to make adjustments. **As companies seek to balance corporate belt-tightening with travelers' demands, it is imperative they recognize the experience of business travelers and find solutions that provide the flexibility travelers seek – but do so within the purview of company travel programs and budgets.**
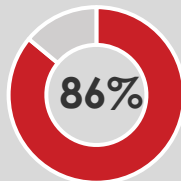
In partnership with Wakefield Research, SAP Concur surveyed 3,850 business travelers across 25 global markets, to gain insight into the current state of business travel and what the next year will bring.
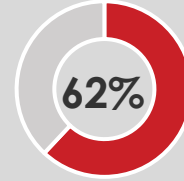
Key Findings

92% assert the future of their career is dependent on their successful business travel in the next 12 months

86% say the uncertain economy has impacted business travel at their company

62% feel they haven't always had an equal opportunity for business travel as others at their company

Flexible Travel and Booking
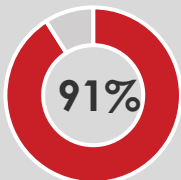
91% at companies with a corporate travel policy expect to be allowed to make travel choices outside of company policy for reasons like safety, work-life balance and sustainability
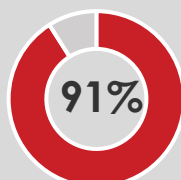
91% are willing to decline an assigned business trip for reasons like health and safety or social, environmental or work-life balance concerns
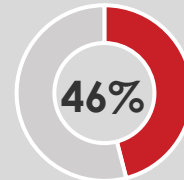
46% typically book their business travel directly with an airline, hotel or car rental company website or app

Health and Safety Remain Top of Mind
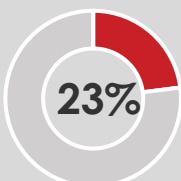
23% have felt they were in immediate danger while on a business trip
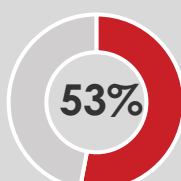
53% have changed their accommodations on a business trip in the past 12 months specifically because they felt unsafe
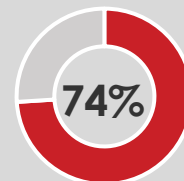
74% have experienced negative situations on a business trip, like unwanted attention, unfair treatment, or discrimination

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Tightrope Walking: Balancing Tightening Budgets with Employee Needs and Experience

Even as the logistics of business travel become more subject to economic volatility, shrinking budgets, and actions to improve environmental sustainability, the vast majority say travel is critical to their continued success. **In fact, more than 9 in 10 business travelers (92%) assert the future of their career depends on successful business travel in the coming year.** Over two-thirds (67%) are very willing to travel for business in the next 12 months, an increase from the 55% who were this willing to travel last year. Even among those who are perhaps slightly less eager, nearly all (98%) are willing to travel for business over the next 12 months.

Employees Depend on Successful Business Travel

More than 9 in 10 business travelers say the future of their career is dependent on successful business travel in the coming year

Business travelers in the Americas are extremely eager to hit the road, with 4 in 5 (80%) very willing to travel for business this year, compared to 68% last year. The percentage who are very willing to travel has risen in other regions as well, increasing from half of European travelers in 2022(50%) to 61% in 2023 and from slightly less than half of Asia-Pacific (APAC) travelers last year (48%) to 60% this year.

When it comes to business travel, what's good for the employee is good for the company as well. **For more than 2 in 5, their**

business travel is critical for maintaining strong relationships with existing clients (42%) and establishing relationships with new clients (41%).

Business travel is important to their ability to remain current and relevant in their field as well, including keeping up on the latest trends, technology, and advancements (38%), networking with others in the field (37%) and visiting and showing a presence at industry events and conferences (34%).

Beyond external relationships, business travel is also critical for internal purposes, including collaborating creatively with members of their team (36%), forming meaningful connections with co-workers (34%), and being more visible and building a stronger relationship with their managers (30%).

Critical for Company and Career

Maintaining strong relationships with clients
42%

Establish relationships with new clients
41%

Keep up on latest trends, tech and advancements
38%

Network with others in my field
37%

Collaborate with members of team
36%

Form meaningful connections with co-workers
34%

Despite many clear advantages and opportunities, 92% of business travelers recognize there are threats to their company's business travel, including more

than a third (34%) who view inflation as among the biggest threats to business travel today and nearly as many (31%) who say the same of cuts to travel budgets or travel freezes.

For nearly 9 in 10 business travelers (86%) the uncertain economy is already affecting their company's business travel, with the most common impact being reduced travel budgets (40%). In many cases, companies' responses to economic uncertainty include travel policy changes that impact the comfort and pleasure of their business travelers. **For nearly a third (31%), the economy has led their company to require travelers to stay in lower quality accommodations and/or less safe areas. Likewise, companies now emphasize lower airline fares even if it means layovers, indirect routes or alternative airports (31%).** Companies have tightened business/premium class travel policies for more than a quarter (26%). This may not be a wise trend, however, as nearly 1 in 5 business travelers (18%) would decline a business trip that required them to book lower-class airfare or an indirect flight.

Economy is Affecting Business Travel
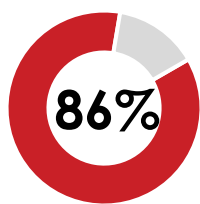
86% say the uncertain economy has impacted their company's business travel

And it's not just the challenges of getting there and back with a tightened budget; schedules on the ground are increasingly demanding, which is often a prerequisite to getting the travel approved. Nearly a third of business travelers (32%) say their company has reduced the number of overnight trips, requiring more same-day returns. For nearly as many, their

company has started requiring a minimum number of meetings per trip to secure approval (28%).

While these changes are beneficial for the company's bottom line, they may be creating tension with travelers. **For more than 2 in 5 (43%) the most stressful stage of business travel is before the trip, including planning, booking, and organizing the trip – a 4-point increase over the 39% who said this last year.**

Business travel is critical, but many feel it's unfairly assigned to a select few

While business travelers view their trips as integral to career advancement, many say travel isn't being offered equally to all. More than 3 in 5 business travelers (62%) think they haven't always had an equal opportunity to take business trips compared to their co-workers for reasons relating to their demographics, sexual orientation, physical appearance, or health conditions.

For example, nearly a third of LGBTQ+ business travelers (31%) believe they don't always have equal opportunity for business travel because of their sexual orientation, 29% of Gen Z business travelers say they haven't gotten the same opportunity for business travel as others because of their age, and 23% of women believe they received less opportunity for business travel because of their gender. Other travelers think they haven't received equal opportunities due to their accent (17%), physical appearance (16%), ethnicity or race (15%), status as a parent or caretaker (13%), or disability (7%).

Value Proposition: Business Travel That Is Safe and Sustainable Is a Must

While many adhere to managers' oversight and their employers' corporate travel policy, business travelers expect and often require more flexibility. The vast majority (91%) expect their company to allow them to make travel choices that are outside of company policy for reasons like safety, work-life balance and sustainability.

Nearly half of business travelers with a formal corporate travel policy expect their employer to allow them to book travel that falls outside of company policy to ensure they feel safe while traveling in certain areas of the world (48%) or to support their ability to maintain a healthy work-life balance (47%). When it comes to seeking greater flexibility, supporting work-life balance is more important for countries in APAC (53%) and the Americas (50%) than in Europe (39%).

The mindset isn't just about value; it's about *values*. More than a third of business travelers (36%) expect their company to allow travel choices outside of company policy to book more sustainable travel options. They care deeply about their carbon footprints, and **89% will take extra steps over the next 12 months to reduce the environmental impact of their business travel.** This includes nearly 1 in 5 (19%) who will take the even more direct step of purchasing carbon offsets for their business travel this year. Nearly a quarter (23%) would take a more direct approach, saying they'd decline a business trip if they had concerns about the environmental impact of the travel, on par with the 24% of business travelers who said they would decline a trip that required using non-sustainable travel options last year.

Critical Traveler Expectations

Ensure I feel safe traveling in certain areas of the world
48%

Support ability to maintain healthy work-life balance
47%

Book more sustainable travel options
36%

Add-on personal travel to work trip
34%

Booking for a conference
31%

Ideological or lifestyle differences with travel destination
30%

This values mindset also applies to the cultures or political climates of their destinations. Nearly a third of business travelers with a corporate travel policy (30%) expect the ability to book travel outside of their company's travel policies when they have ideological or lifestyle differences with the travel destination. In fact, more than a quarter of business travelers (26%) would decline a business trip that required travel to a region, state, or country with a government or culture they do not support.

Beyond differences, some business travelers are simply seeking to make the most out of their destination; 34% expect the ability to make exceptions to policy to add on personal travel to their work trips.

Flexibility is non-negotiable for travelers, and they are not afraid to stand firm when needed. **Indeed, the vast majority of business travelers (91%) are willing to decline an assigned trip for reasons like**

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health and safety, social, environmental or work-life balance concerns. More than 2 in 5 would decline a business trip if they had safety or social concerns about traveling to certain parts of the world (44%) or if they had health concerns about traveling to a particular destination (41%).

Flexibility Required

28% would decline a business trip with a lack of flexibility to make adjustments to the trip outside of company policy

Americas	APAC	Europe
31%	**34%**	**22%**
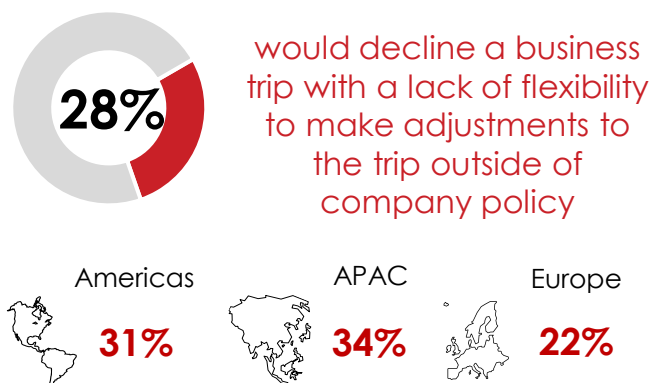
Nearly 3 in 10 business travelers (28%) would decline a business trip that lacked the flexibility to make adjustments to the trip outside of company policy, including 34% of travelers from APAC, 31% from the Americas and 22% from Europe.

Highlighting the need for flexibility is the increasingly common experience of last-minute travel changes. Nearly 2 in 5 business travelers (39%) view last-minute delays and cancellations by airlines as one of the biggest threats to business travel today.

Flexibility in Booking Options Meets Traveler Needs But at the Cost of Corporate Control

Even as companies attempt to manage tightening budgets, many of their travelers are reducing the company's visibility by going outside their purview to book their business travel. Nearly half of business travelers (46%) typically book their business travel directly using an airline, hotel or car rental company's website or app.

Many travelers are changing or canceling flights using this direct approach as well – 37% typically use the airline's website or app and 19% call the airline directly. Fewer use their company's online booking tool (25%) or call their travel agency (18%) to cancel or change their flight.

Fewer (43%) typically book using their company's travel agency or travel department, particularly in APAC (41%) and Europe (40%), while nearly half of business travelers in the Americas (47%) use their company's travel agency or department. Online booking tools such as Concur Travel are typically used by just over a third of business travelers (36%), with this being most common in APAC (47%), followed by the Americas (38%) and Europe (27%).

Tools Used to Book Business Travel

Directly with an airline, hotel, or car rental company website or app
46%

Company's travel agency or travel department
43%

Online booking tools, such as Concur Travel
36%

Companies with a travel policy are seeing more business travelers book through the company's travel agency or travel department (46%, compared to 28% of travelers without a travel policy) or using online booking tools such as Concur Travel (41%, compared to 24%). However, this makes little difference in keeping travelers from booking directly with an airline, hotel or car rental company through their website or app, which 46% of business travelers at companies with a formal corporate travel policy do, as do 50% of travelers at companies without travel policies.

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Duty of Care: Health and Safety Remain Top of Mind

Staying healthy and safe while traveling for business isn't just a top concern for travelers; threats to this can be a dealbreaker. **The most commonly viewed threat to business travel today is health and safety concerns (44%).** This is most common among travelers in APAC (51%) and the Americas (49%) yet is also seen as a top threat by more than a third of travelers in Europe (35%). In addition, more than a third (34%) say international or local conflicts and tensions are a threat to business travel.

Dangerous Situations

23%
have felt in immediate danger on a business trip

Americas	APAC	Europe
28%	**24%**	**17%**

Unfortunately, travelers' fears are well-founded. **Nearly 1 in 4 business travelers (23%) have experienced a situation on a business trip where they felt they were in immediate danger.** This experience is more common among travelers in the Americas (28%) and APAC (24%) than among European travelers (17%). Business travelers expect their companies to ensure their health and safety while traveling. Even as 31% of business travelers say their company is requiring stays in lower quality accommodations and/or accommodations in less safe areas as a result of the uncertain economy, nearly half of travelers at companies with a formal travel policy (48%) expect their company to allow them to make choices that are outside of company policy to ensure they feel safe when traveling to certain areas of the world.

Unsafe Accommodations

53%
have changed accommodations on a business trip because they didn't feel safe

Indeed, over half of business travelers (53%) have changed their accommodations on a business trip in the past 12 months specifically because they felt unsafe, with 28% saying they've done this more than once. Nearly two-thirds of travelers from the Americas have done so (64%), as have 58% of APAC travelers, while fewer European travelers (42%) have taken this step.

Whether based on gender, ethnicity, religion or community, discrimination is a harsh reality throughout the world. But for business travelers, outright or subtle discrimination and/or harassment can undermine expectations of safety and get in the way of a productive and rewarding experience. While nearly 3 in 4 business travelers (74%) have experienced negative situations on a business trip, for some the unwanted attention became particularly unsettling.

Many business travelers have experienced direct discrimination, including unfair or improper security screening (26%), being the target of unwanted sexual advances or comments (22%), or having derogatory language directed at them (20%). Others have faced more subtle forms of discrimination, like being ignored by service workers who weren't otherwise busy (31%), being asked if they are traveling with their spouse (25%), or having fellow travelers assume they worked at the hotel (19%).

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Business travel particularly concerning for LGBTQ+ travelers

It's a troubling truth that business travelers who identify as LGBTQ+ face particular, often greater, safety concerns than business travelers overall. Most LGBTQ+ business travelers have had negat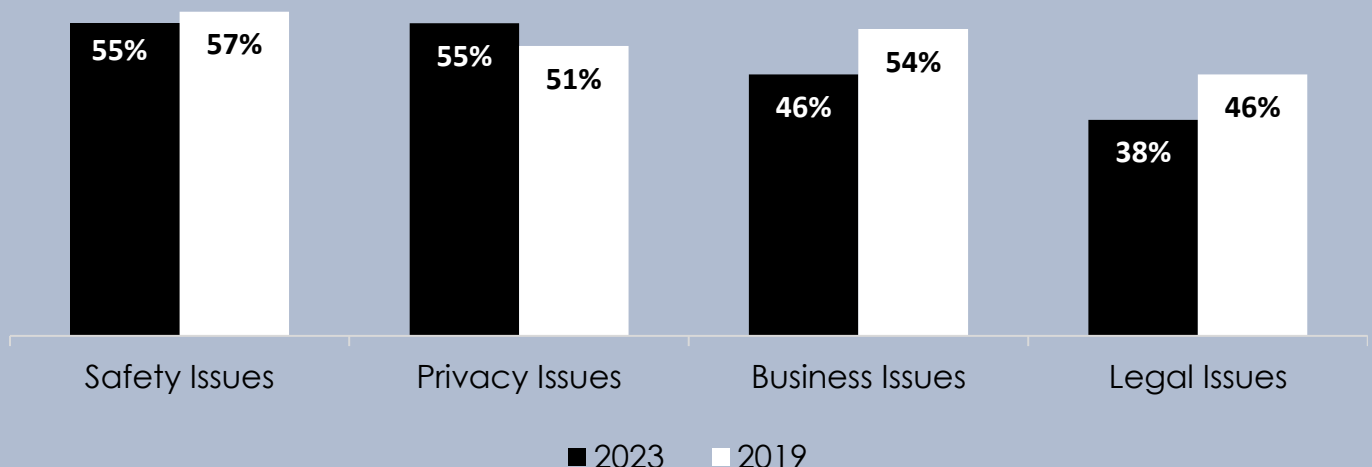ive experiences while traveling for work. **Nearly a third of LGBTQ+ business travelers (32%) have felt they were in immediate danger while on a business trip, 2 in 5 (40%) have been the target of unwanted sexual advances or comments, and a third (33%) have had derogatory language directed at them.** More than 4 in 5 (82%) have changed their accommodations on a business trip in the past 12 months because they felt unsafe, including 64% who did so more than once.

This is a major reason 9 in 10 business travelers who identify as LGBTQ+ (90%) have hidden their sexual orientation on a business trip, similar to the 95% who reported this when the question was last asked in 2019. While over half (55%) say they've hidden their identity for privacy reasons, others have done so for more concerning considerations. **Over half have hidden their sexual orientation on a**

business trip for safety reasons (55%) and nearly 2 in 5 (38%) have hidden their sexual orientation on a business trip for legal reasons due to the region they visited having anti-LGBTQ+ laws. In addition, close to half of LGBTQ+ business travelers (46%) have hidden their sexual orientation on a business trip because they felt their business goals had a better chance of success if they hid their identity.

Companies need to be especially mindful of this, as over half of LGBTQ+ travelers at companies with a formal travel policy (56%) expect their company to allow them to make travel choices outside of company policy to ensure they feel safe when traveling to certain areas of the world. Likewise, over 2 in 5 (43%) expect allowances if they have ideological or lifestyle differences with a travel destination. A third of LGBTQ+ business travelers (33%) would decline a business trip that required travel to a region, state or country with a government or culture they do not support, compared to 26% of other business travelers.

LGBTQ+ Traveler Concerns Show Little Decline Since 2019

	Safety Issues	Privacy Issues	Business Issues	Legal Issues
2023	55%	55%	46%	38%
2019	57%	51%	54%	46%

■ 2023 □ 2019

Conclusion

The business and career benefits of business travel are undeniably crucial to the success of employees and companies alike, yet tightening budgets are clashing with traveler needs as businesses seek the best path forward. Companies have a duty to their employees to ensure the travel that is critical to success is not conducted at the expense of their travelers. Yet in the grip of economic volatility, they must also face the realities of their fiscal responsibilities. With the costs of flights and first-class accommodations rising, companies are moving toward same-day returns, second-rate accommodations, and back-to-back meeting schedules.

Business travelers expect flexibility in their company's policies and are willing to decline a trip if they feel unsafe or overextended, or if they're expected to travel in a manner that is inconsistent with their commitment to the environment or to countries with values that don't align with their own. They are also quite commonly booking their business travel directly with suppliers, outside of corporate tools, leaving companies with limited visibility. To accommodate both, companies must provide business travelers with booking options and travel policies that acknowledge and accommodate their concerns while also addressing the company's need for cost-cutting measures.

Travelers' willingness to decline trips despite the value they view as critical to their own career should sound an alarm in every company that relies on business travelers to get the job done.

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Methodological Notes

The Concur Survey - Travel Managers was conducted by Wakefield Research (www.wakefieldresearch.com) between April 7th and April 28th, 2023, 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.

The Concur Survey - Business Travelers was conducted by Wakefield Research (www.wakefieldresearch.com) between April 7th and April 28th, 2023, 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. 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 3,850 interviews conducted in this 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.

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Thank You

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