

ABOUT THE SAP CONCUR WHITE PAPER

The market-specific data in this addendum is part of the SAP Concur survey of 4,850 business travelers—defined as those who travel for business 3+ times annually. The survey includes travelers from 23 global markets: U.S., Canada, Brazil, Mexico, 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), Sweden, Denmark, Norway, and Finland.

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SAP Concur White Paper Addendum for France

Many French business travelers are looking forward to getting back to business.

Over a third of French business travelers (34%) feel excited about resuming travel once restrictions are lifted, and about the same amount feel worried (33%). Three in 5 (60%) have positive feelings about traveling again. There is an eagerness to return to the road, which is likely because nearly half of French business travelers anticipate a reduced number of deals or contracts signed (48%) and 40% expect declines in new business due to lack of in-person meetings.

French business travelers predict a new normal for business travel post-COVID.

Nearly all French business travelers (97%) expect a “new normal” with changing norms and practices. Over 2 in 5 (41%) expect limiting the use of public transportation and 30% predict using their personal vehicle for traveling. A quarter (25%) also expect to prioritize taking the shortest route between locations, such as direct flights, 17% expect to avoid airports in major cities, and nearly as many (14%) expect enforced quarantine upon arrival.

However, while travel may look different post-COVID, **75% of French business travelers (compared to 65% globally)** do *not* expect to routinely limit attendance at events and conferences, suggesting changes will be needed to meet their new expectations as they return to the road.

The trip itself is now the most stressful stage of travel for French business travelers.

More than 2 in 5 (41%) French business travelers now say they experience the most stress during the trip, rather than before (26%) or after the trip (33%). Today, nearly 2 in 5 (38%) say their health and safety are their top priority while traveling for business—over three times as many who cite business needs (11%).

Companies should meet the expectations of French business travelers.

An overwhelming 99% of French business travelers consider some measures critical for safely returning to the road, especially mandatory personal health screenings for traveling (37%), limiting travel to only the most critical trips (36%), and easier access to personal protective equipment (34%). The anticipated implementation of these various safety measures might be why nearly a fifth of business travelers (19%) also believe pre-trip approvals are critical to safely return to the road.

A powerful 94% of French business travelers say company trainings would be beneficial, especially trainings on how to protect their health and safety while traveling (45%), maintaining healthy habits while traveling (40%), and traveling more sustainably (27%).

French business travelers want tech that can keep up.

The most important mobile app features for French business travelers include the **ability to view and manage their trip itinerary (42%, compared to 36% globally)**, traveler safety information (41%), the ability to book a hotel (38%), and the ability to book air travel (32%). Nearly a quarter (23%) want automatic notifications for out-of-policy bookings or expenses, and 18% want the ability to track and offset their carbon footprint.

When travel starts, French business travelers are most likely to start booking **directly with an airline or hotel website/app (29%, compared to 22% globally)**, with internet search engines (24%), or with their company's travel agency (22%).



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METHODOLOGICAL NOTES

The SAP Concur Survey of Business Travelers was conducted by Wakefield Research (www.wakefieldresearch.com) between May 20th and June 9th, 2020. The survey was conducted among 4,850 Business Travelers who travel for work requiring an overnight stay 3+ times per year. The survey was conducted in 23 markets: U.S., Canada, Brazil, Mexico, UK, France, Germany, ANZ region (Australia and New Zealand), SEA region (Singapore, Malaysia), China, Hong Kong, Taiwan, Japan, India, Korea, Italy, Spain, Dubai, Benelux (Belgium, Netherlands, and Luxembourg), Sweden, Denmark, Norway, and Finland.

Results of any sample are subject to variation. The overall margin of error for this survey of 4,850 respondents is +/- 1.4 at 95% confidence. Meaning, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 1.4 percentage points from the result that would be obtained if interviews had been conducted among all persons in the universe represented by the sample. Margins are slightly larger for subgroups. The margin of error for the 250 respondents from France in this study is +/- 6.2 at 95% confidence.