

ABOUT THE SAP CONCUR WHITE PAPER

The market-specific data in this addendum is part of the SAP Concur survey of 3,850 business travellers. The survey includes travellers from 25 global 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.

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SAP Concur White Paper Addendum for APAC Business Travellers

APAC travellers are ready to get back to the road.

Overwhelmingly, Asia-Pacific (APAC) business travellers are ready to resume travel and get back to what they do best: 95% are willing to travel in the next 12 months, including 63% who are very interested.

APAC BUSINESS TRAVELLERS' WILLINGNESS TO RESUME TRAVEL



*ASKED AMONG 1,050 BUSINESS TRAVELLERS FROM APAC MARKETS

This is driven by travellers' belief that they will suffer if their company does not increase business travel in the next year. However, in order to feel comfortable on the road, they expect increased flexibility, marking changes in how they travel and do business.

APAC travellers worry that failing to resume travel will hurt both their career as well as their own lives.

For many, business travel is inextricably tied to their career success and fulfillment—so much so that 81% of APAC business travellers worry the inability to increase business travel will affect them personally. Their personal career concerns include **difficulty developing and maintaining business connections (51%, compared to 45% globally)**, **not advancing in their career (39% compared to 33% globally)** and making less money (39%). Nearly 1 in 7 (14%) worry they will lose their job, and for very frequent business travellers (16+ trips a year), that number goes up to nearly 1 in 4 (22%).

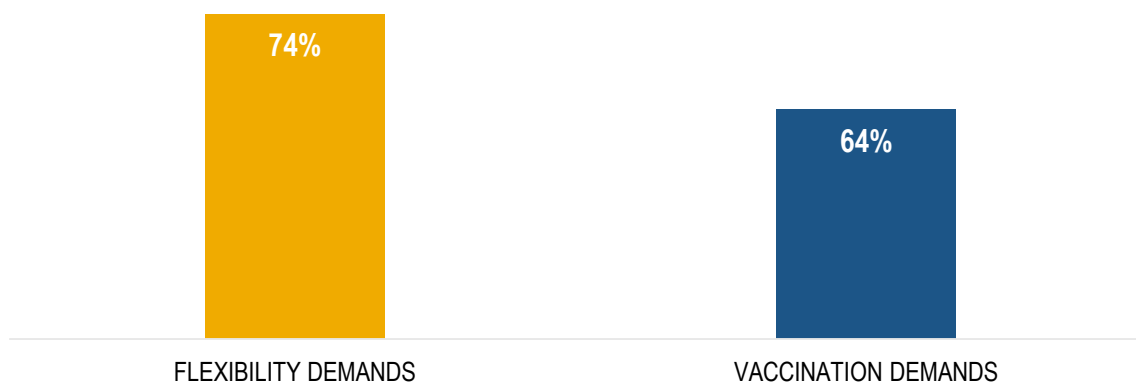
As a result, nearly two-thirds of APAC business travellers (65%) say they are driving the return to the road rather than their company—largely in part because they view trips as opportunities to strengthen business relationships and broaden their horizons: A majority want to make personal connections with customers and colleagues (57%) as well as experience new places (53%).

Flexibility will be a top driver for APAC business travellers.

In a key departure from the narrative of the previous year, 74% of APAC business travellers rank flexibility as a top-consideration for business travel, well ahead of vaccination-related demands at 64%. This includes everything from planning through the completion of their trips: business travellers cite being able to select their preferred accommodations (49%) and mode of travel (43%) as essential travel perks.

Findings suggest that structured policies aren't an issue for business travellers—provided those policies are up to date. Those whose company has a mandated travel policy (43%) or guidelines (44%) are more likely to value the ability to book travel directly on supplier websites.

APAC BUSINESS TRAVELLERS WANT FLEXIBILITY WHEN RESUMING TRAVEL*



*ASKED AMONG 1,050 BUSINESS TRAVELLERS FROM APAC MARKETS

Once they are on the road, almost all APAC business travellers (93%) expect changes to their travel routine, including more frequently staying in larger hotels (41%), **prioritizing domestic trips (39%, compared to 33% globally)** and using a personal vehicle instead of public transportation (37%). More than 3 in 5 (61%) expect to engage in more sustainable practices, such as prioritizing trips with shorter distances (37%), avoiding layovers (28%) and prioritizing alternatives to air travel (23%).

Flexibility can also mean more bleisure: about 9 in 10 APAC business travellers (92%) will add personal vacation time to their business trips in the next 12 months. Of those who will, they plan to add vacation time to 28% of their business trips in the next 12 months.

Without a return to travel, APAC business travellers worry they will face extreme consequences.

More than half of APAC business travellers (54%) would make changes if their company doesn't provide the necessary policies or measures to protect their health and safety, including **nearly 2 in 5 (37%, compared to 31% globally) who would ask to limit their travel** and 16% who would look for a different position.

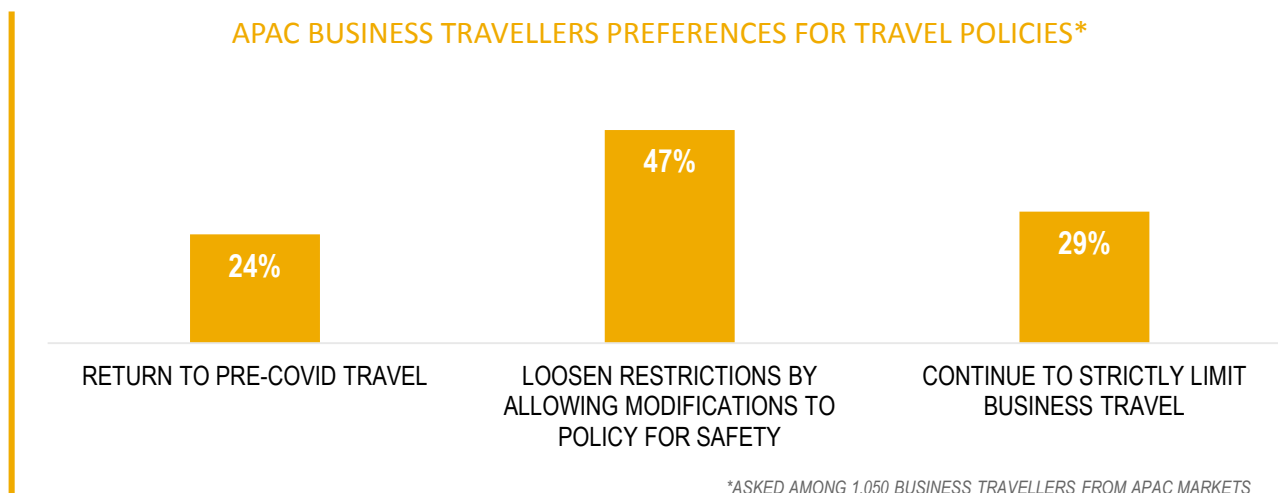
While retention issues are a significant concern (20%), APAC business travellers see a failure to resume travel as a risk to the company's bottom line: 80% have concerns if their company does not increase business travel in the next 12 months. Specifically, they worry that without increased travel, it will be more difficult to sign new deals (40%), build new relationships (39%) and renew contracts with existing clients (39%). In fact, 9% are afraid their business will shut down.

APAC business travellers do not want COVID-19 travel policies to stay in place.

About 3 in 4 (76%) business travellers do not want their company to return to pre-COVID-19 policy. **Nearly half (47%, compared to 37% globally) expect their company to adjust by allowing modifications to policies for health and safety.**

Business travellers with guidelines (53%) or mandated policies (40%) are more likely to want looser restrictions, compared to those whose company has no written policy (36%¹). With greater flexibility, they'd stay at larger hotels (43% and 42%, respectively vs. 24%¹) and take trips closer to home (37% and 41% vs. 22%¹).

But not having written policy at all, leaves business travellers in a state of uncertainty. They are more likely to assume responsibility for their well-being on trips (39% mandated and 42% guidelines vs. 52%¹ no policy) yet don't consider changing travel plans without repercussions essential (44% vs. 36% and 23%¹).

APAC BUSINESS TRAVELLERS PREFERENCES FOR TRAVEL POLICIES***Safety remains a priority, but one that APAC travellers place on themselves.**

Last year, 35% of business travellers held themselves most accountable for their health and safety on a trip and 12% held their company's travel agency most accountable. Now, 41% hold themselves most responsible, followed by their employer (26%) and their company's travel agency (14%).

Stress has become a problem at every phase of APAC travellers' journey.

While the trip itself was seen as the most stressful by far last year (48%), this year has seen a return to pre-pandemic stress patterns, with before (27%) and particularly after (39%) the trip being seen as the most stressful.

¹Small base size; findings are directional.



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METHODOLOGICAL NOTES

The SAP Concur Survey – Business Travelers was conducted by Wakefield Research (www.wakefieldresearch.com) 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.

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. Margins are slightly larger for subgroups. The margin of error for the 1,050 respondents from APAC in this study is +/- 3.0 at 95% confidence.