

Wakefield Research has compiled the following data for Indian business travellers to support the global white paper. Bolded sentences indicate notable findings.

Indian business travellers are at odds with their company over cuts to flexibility.

- A powerful 68% of Indian business travellers consider going on the road critical to their career.
- But undercutting that are the flexibility cutbacks 95% have experienced, **such as adding personal travel to business trips (37%, compared to 25% globally, the highest overall)** or cuts to authorising remote work during personal travel to avoid taking leave days (35%).
- Perhaps as a result, 26% would decline a trip that doesn't allow them to extend it for personal travel.

Indian travellers think companies prioritise cost-cutting as they deal with delays and cancellations.

- In the past 12 months, 91% have been forced to take unanticipated actions because of unexpected travel circumstances—including cancelling or rescheduling meetings (36%).
- **After 67% endured longer layovers or other delays (compared to 57% globally, the second highest overall), 42% would decline a trip to avoid delays or cancellations (compared to 29% globally, tied for highest).**
- There are compromises like “booking buffers.” While 64% proactively book extra time for their arrival, 55% book extra time for their departure.
- Despite their struggles, 27% believe their company prioritises cost-cutting over their need for flexible options.

Indian business travellers are putting their foot down.

- Overall, 95% would decline a trip, including over safety concerns about the destination (44%) or **concern for the safety of the mode of transportation (44%, compared to 33% globally, the second highest overall).**

Indian business travellers see AI as a solution—if implemented correctly.

- While 99% would consider using AI-enabled options for booking their travel, just 3% are comfortable doing so now.
- A strong majority (97%) require company-provided support to feel comfortable using AI-enabled options for bookings, **including market-leading demand for personal data protection (63%, compared to 48% globally) or company-provided training (54%, compared to 38% globally).**
- Travellers are most willing to consider using AI-powered automation for **guidance on wellbeing and safety (49%, compared to 37% globally) or cancellations or rebooking recommendations (46%, compared to 34% globally and tied for the second highest overall).**

Spotlight: Opportunity Cost

- An alarming 73% haven't always felt they had an equal opportunity to take trips compared to their colleagues, especially because of their **level of seniority (34%, compared to 19% globally, the most of all markets)**, age (26%), or **their ethnicity or race (20%, compared to 10% globally, the second highest overall).**

Spotlight: Pre-approval Prevalence

- **More than 3 in 4 (78%) note increased focus at their company on pre-travel approvals (compared to 67% globally, the second highest overall)**, including just over a third (36%) who have seen this implemented for all trips—yet still, 38% have incurred additional expenses on a business trip because of unexpected travel challenges.
- **An alarming 46% of Indian travellers have been forced to book travel directly with suppliers due to unexpected challenges (compared to 30% globally, the highest of all markets).**

Spotlight: Sustaining Sustainability

- **A market-leading 41% see their company more focused on sustainable travel than flexibility or cutting travel costs (compared to 29% globally), and many approve: 40% would decline a trip due to the environmental impact or the inability to choose sustainable options (compared to 27% globally, the second highest overall).**



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METHODOLOGICAL NOTES

The Concur Business Travelers - Global Survey was conducted by Wakefield Research (www.wakefieldresearch.com) between April 5th and April 26th, 2024, among 3,750 Business Travelers in 24 markets: U.S., Canada, UK, Germany, France, Benelux (Belgium, Netherlands, Luxembourg), Sweden, Denmark, Norway, Finland, Italy, Spain, ANZ (Australia, New Zealand), Middle East (UAE & Saudi Arabia), Japan, Korea, India, Mexico, Brazil, SEA (Singapore & Malaysia), South Africa, Portugal, Switzerland, and Austria. Includes an oversample to increase the total number of U.S. Healthcare respondents to 100, and an oversample to increase the total number of U.S. Higher Education respondents to 100.

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 100 respondents from India in this study is +/- 9.8 percentage points at 95% confidence.