

ABOUT THE SAP CONCUR WHITE PAPER

This addendum analyzes data from India in order to provide a clearer understanding of how this market fits into the broader analysis of global data posited in the SAP Concur White Paper Report.

The market-specific data in this addendum is part of the SAP Concur survey of 7,850 business travellers—defined as those who travel for business 3+ times annually—from this and 18 other global markets: US, Canada, UK, Germany, France, Belgium, Netherlands, Luxembourg, Sweden, Denmark, Norway, Finland, Australia, Japan, China/Hong Kong/Taiwan, Singapore/Malaysia, Mexico and Brazil.

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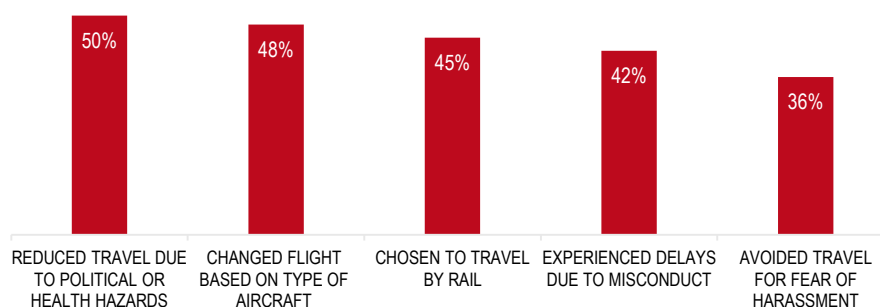
SAP Concur White Paper Addendum for India

Indians do not put safety as a priority despite their experiences with risk on the road.

Globally, business travellers are most likely (31%) to prioritize safety above all else while they are on the road. However, Indian business travellers are an exception: while 28% say they prioritize safety first, slightly more say they put business first (29%). But while Indian business travellers are not as likely to put safety first, they de-prioritize it despite their experience on the ground.

Indian business travellers are among the most likely (88%) to have experienced safety concerns on the road in the last 12 months (global average: 77%). In fact, Indian business travellers are significantly more likely to have experienced every type of safety concern: reducing travel to a certain location due to political unrest or health hazards (50%; global average: 38%), selecting or changing a flight based on the type of aircraft (48%; global average: 36%), travelling by rail over air because of environmental concerns (45%; global average: 33%), experiencing delays due to another passenger's misconduct (42%; global average: 34%) and avoiding somewhere for fear of being sexually harassed (36%; global average: 24%).

DIFFICULTIES FACED BY INDIAN BUSINESS TRAVELLERS IN THE LAST 12 MONTHS*



*ASKED AMONG 500 INDIAN BUSINESS TRAVELLERS

Those who have avoided a place out of fear of sexual harassment include nearly half of female Indian business travellers (49%; global average among female business travellers: 28%), pointing to the travails these women have experienced on the road. A shocking 87% of female Indian business travellers have been harassed on a business trip, among the most of all markets surveyed (global average: 77%), especially the indignity of being asked if they were travelling with their husband (62%; global average 42%).

Things are also deeply difficult for LGBTQ+ Indian business travellers, nearly 3 in 4 (73%)¹ of whom have hidden their sexuality on a business trip out of concern for their safety (global average: 57%).

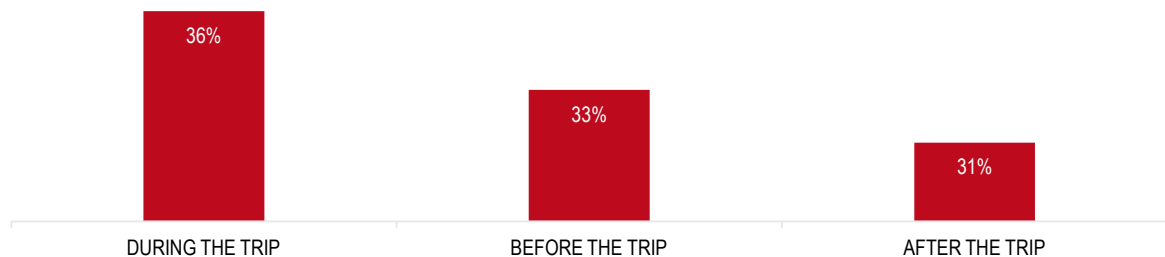
¹ Small base size; directional findings only.



Indians feel most stressed while on the road.

With all they have experienced on the road, Indian travellers are coming down clearly on when they feel the most burdened. Nearly 2 in 5 Indian business travellers (36%) say that the most stressful part of a business trip is during the trip itself, among the highest of all markets surveyed (global average: 30%). They are more likely to say that the trip itself is the most stressful compared to the period before the trip (33%) or after (31%).

INDIAN BUSINESS TRAVELLERS MOST LIKELY TO SAY DURING THE TRIP IS THE MOST STRESSFUL STAGE OF BUSINESS TRAVEL*



**ASKED AMONG 500 INDIAN BUSINESS TRAVELLERS*

Indians are combatting stress with safety habits.

Perhaps for Indian business travellers, safety is less a priority than a habit. Indian business travellers are also among the most likely to have changed their travel accommodations specifically because they felt unsafe (68%; global average: 58%). This points to Indian business travellers not necessarily overlooking safety: in fact, they are already so invested in their own safety that it has become second nature.

This is reflected in how Indian business travellers use the resources available to them to feel safe. Nearly all Indian business travellers (98%) have shared their location while travelling for business, the most of all markets surveyed (global average: 91%). This includes nearly 3 in 4 (73%) who did so for safety specifically, second only to Mexico (76%) as the most likely to do so (global average: 58%).

Indians prefer technology as a solution for business and safety alike.

Indian business travellers are particularly likely to be willing to share information in order to improve their business travel experience: nearly all (99%) would be willing, the most of all markets surveyed (global average: 94%). This includes transportation expenses (62%) and hotel expenses (61%).

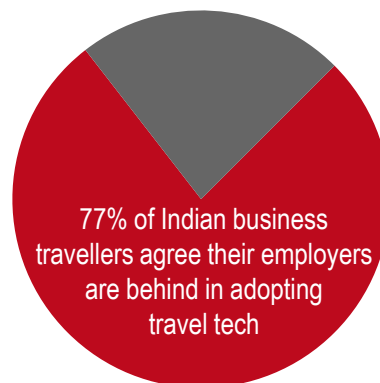
Their preference for technology coincides with how they book their trip. Nearly 3 in 4 Indian business travellers (73%) book using online travel agencies or sites, second only to business travellers from neighboring China/Hong Kong/Taiwan (77%) in their preference for doing so (global average: 57%). Indian business travellers are also the second-most likely to use online booking tools (53%, second only to 54% of Australian business travellers; global average: 38%).

And, given that they find during the trip to be the most stressful stage of business travel, Indian business travellers are also looking for modern solutions for problems on the road. More than 4 in 5 (84%) Indian business travellers would rather rebook canceled travel arrangements online than do so over the phone, the most of all markets surveyed (global average: 72%).

Indian business travellers' preference for technology means their employers have to do more to keep up.

Indian business travellers are also more prone to be critical of the business travel solutions being offered to them by their employer. More than 3 in 4 Indian business travellers (77%) say their company is behind in adopting the latest technologies to manage business travel, among the most of all markets surveyed.

INDIAN BUSINESS TRAVELLERS AGREE THEIR EMPLOYER IS BEHIND IN ADOPTING THE LATEST TRAVEL MANAGEMENT TECHNOLOGY*



*ASKED AMONG 500 INDIAN BUSINESS TRAVELLERS

Those who agree point to booking and expense-reporting tools as the area where their employers' tech lags behind (67%, second only to 69% of business travellers from Singapore/Malaysia; global average: 58%). And while Indian business travellers say safety is not their top priority, they are particularly interested in seeing their employer improve the travel safety tools they offer (66%, second again to 67% of business travellers from Singapore/Malaysia; global average: 52%).

Conclusion

Indian business travellers demonstrate a strong preference for tech-forward travel solutions as well as a clear need for safety tools. For both of these reasons, Indian businesses are a prime candidate for an integrated travel solution that could help ensure the safety of Indian business travellers while also providing an all-in-one platform for booking and expense reporting.



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METHODOLOGICAL NOTES

The SAP Concur Survey was conducted by Wakefield Research (www.wakefieldresearch.com) among 7,850 business travellers, defined as those who travel for business 3+ times annually from the following markets: US, Canada, UK, Germany, France, Belgium, Netherlands, Luxembourg, Sweden, Denmark, Norway, Finland, Australia, Japan, China/Hong Kong/Taiwan, Singapore/Malaysia, India, Mexico and Brazil. Fielding occurred between July 29 and August 12, 2019, using an email invitation and an online survey.

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 1.1 percentage points overall, 4.4 percentage points in the US, Canada, UK, Germany, France, Belgium, Netherlands, Australia, Japan, China/Hong Kong/Taiwan, Singapore/Malaysia, India, Mexico and Brazil, 6.9 percentage points in Sweden, Denmark, Norway, Finland, and 13.9 percentage points in Luxembourg, from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.