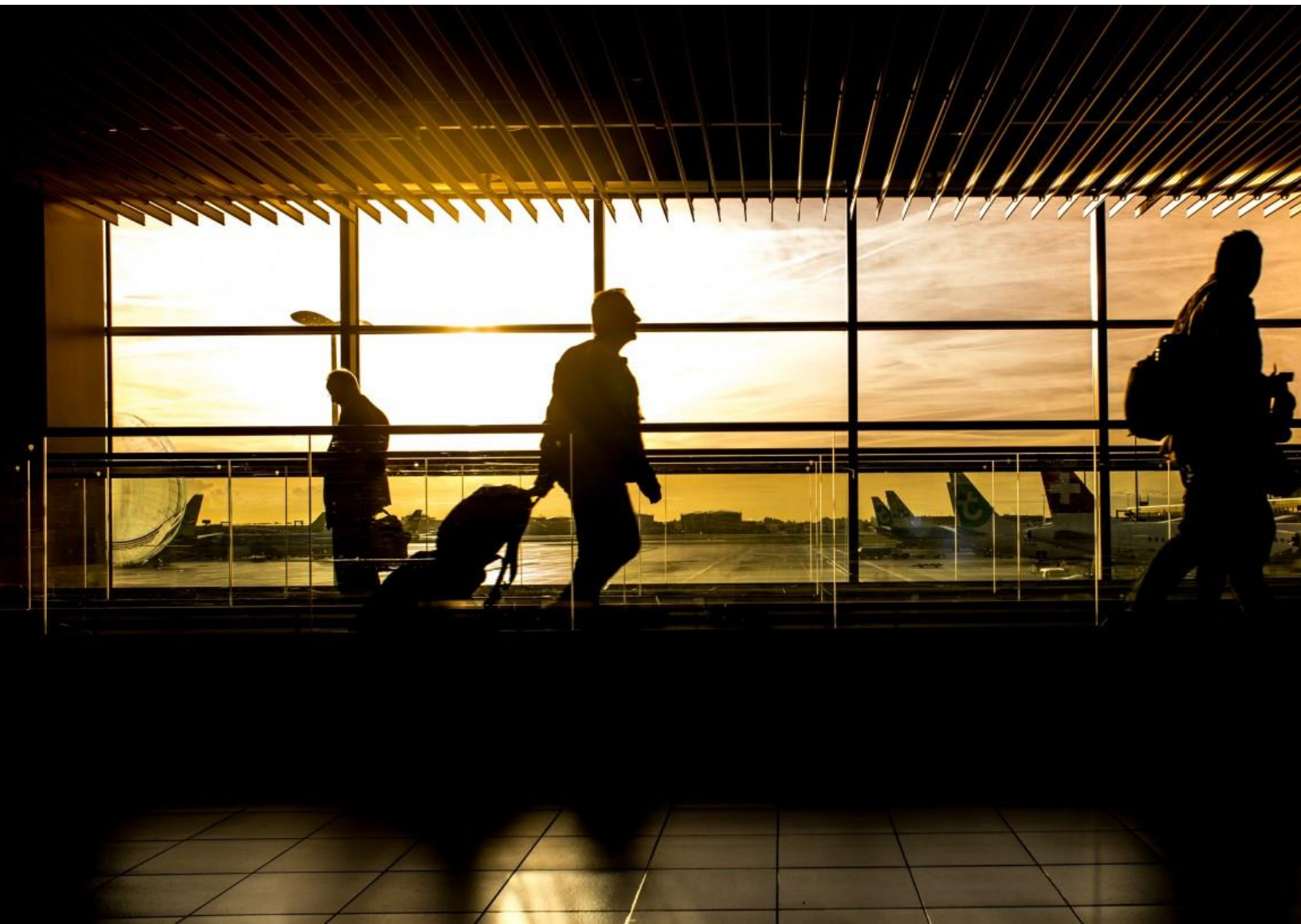




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BUSINESS TRAVEL REPORT

JULY 2020

Executive Summary

COVID-19 may have upended business travel for months on end, but as restrictions are lifted, business travelers are looking to how they can best prepare to resume operations and return to the road.

To capture the new normal of business travel—and to help companies make travel as safe and as accommodating as possible—SAP Concur surveyed 4,850 business travelers in 23 markets to determine what measures they believe are necessary, both from themselves as well as from their employers. This research suggests that travelers are excited to get back on the road—but that they want support and solutions so they can do so safely.



Business travelers recognize that travel is important to success, and nearly a third are *excited* to get back on the road.

Key Findings



"Excited" ranked second (32%) among business travelers when asked about feelings on a return to travel.



52% expect a reduced number of deals or contracts that require in-person interactions to be signed.



92% expect negative business consequences as a result of not being able to travel.



97% expect new norms on the road, including wearing facemasks (54%) and enforced social distancing (47%).



Because of these changes, 45% of travelers now say the trip itself is the most stressful stage of business travel.



96% think safety measures need to be in place before they return to the road.

65% who want new safety measures will make changes if those measures aren't implemented.



In fact, 18% who want safety measures implemented would look for another position if changes are not put in place.



94% say company-provided training would be helpful before resuming travel.



The most popular training is on how to protect health and safety while traveling (54%).



Travelers are twice as likely to hold themselves accountable (36%) for their own well-being than their employers (18%).



46% say traveler safety information is the most important feature in a mobile business travel app.

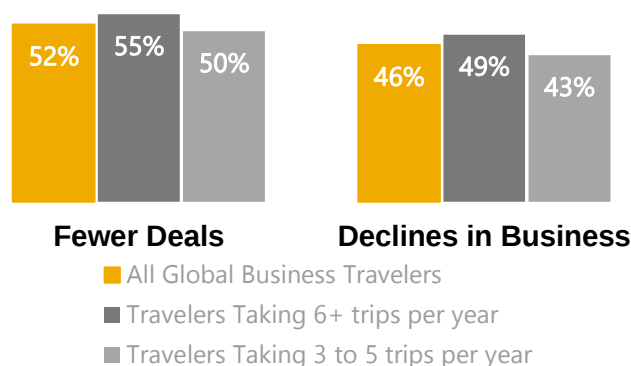


Back to Business

Given the stress of returning to the road in these unprecedented circumstances, it's understandable that 39% of business travelers feel worried about resuming travel once restrictions are lifted. **But nearly a third (32%) feel excited as well.** In fact, 59% of travelers identified a positive emotion associated with their next business trip. Travelers from the Americas (40%) were most likely to feel excited, compared to 30% in the Europe/Middle East region (EMEA) and 29% in the Asia-Pacific region (APAC). Similarly, travelers under 40 (36%) are more excited about the return to the road than their older peers (26%).

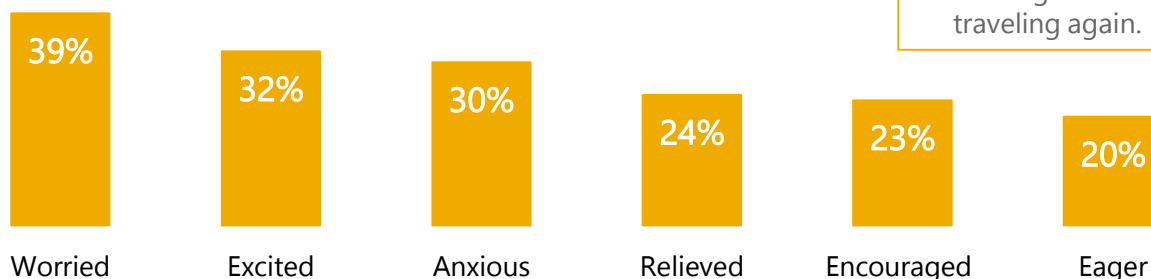
There are findings that suggest travelers at companies with more structure and solutions at hand are more eager to return. **Online booking tools (OBTs) make a big difference, with travelers who use their company's OBT 33% more excited than travelers who do not.** The same is also true among travelers who use travel management companies, who are 13% more excited than travelers who do not. Travelers at companies with mandated travel policies are 14% more excited than those from companies with no written policies.

% Who Anticipate Seeing Fewer Deals or Declines in Business



Meanwhile, the consequences of not being able to conduct travel are clear. **Over half of business travelers (52%) anticipate fewer contracts or deals that would require in-person meetings and more than 2 in 5 (46%) expect declines in new business due to lack of in-person meetings.** Travelers who take 16 or more trips per year report the highest percentage of their work which cannot be replaced by video meetings or other telework.

Top-Six Emotions for Business Travelers Regarding a Return to the Road



59% have **positive** feelings about traveling again.

The New Normal of Business Travel Post-COVID

Just because many business travelers are excited to return does not mean they think business travel will look exactly the way it did before COVID-19. Instead, **an overwhelming 97% of business travelers expect a “new normal” with changing norms and practices.** And those from companies with written travel policies—either mandated (98%) or guidelines (97%)—are significantly more likely to expect new travel behaviors than those from companies with no written policies (91%).

A New Normal

97% of business travelers expect a “new normal” for business travel, with some new behaviors expected to persist **even after COVID-19 related restrictions are lifted.**



54% expect to wear facemasks during travel



52% anticipate hand sanitizers becoming standard accessories



47% foresee travel-enforced social distancing



42% think they'll take up contactless greetings



41% predict temperature screenings will be routine

BUSINESS TRAVELERS ARE CHANGING THE WAY THEY TRAVEL

Travel's new normal starts with how travelers expect to get from one place to another: **37% expect limiting the use of public transportation and 29% predict using their personal vehicle for traveling.** Travelers from the Americas (33%) are more likely than those from EMEA (27%) and APAC (27%) to use their personal vehicle for travel, a trend which points to the need for technology solutions which can provide greater visibility into spend when travelers are driving for work.



Air travel could be particularly different: **29% expect to prioritize taking the shortest route between locations, such as direct flights,** which might impact travel budgets as businesses rethink the concept of lowest-logical-fares in their travel programs in order to allow more direct flights as a traveler safety measure. More than a fifth (21%) expect to avoid airports in major cities, while 26% expect enforced quarantine upon arrival.

But 65% do not expect to routinely limit attendance at conferences or events when business travel resumes, meaning employers will need to consider these new travel preferences in order to safely bridge this divide.

COVID-19 MEANS NEW RULES FOR TRAVEL ETIQUETTE

Once they are back on the road, business travelers expect they and their colleagues will handle themselves a bit differently in the wake of COVID-19. **Nearly half (47%) predict travel-enforced social distancing, and nearly as many travelers (42%) predict alternative contactless greetings to stand in for handshakes.**

Interestingly, the most frequent travelers (16+ trips per year) anticipate somewhat fewer changes than their peers: **Just under half of very frequent travelers expect wearing masks (49%) and using hand sanitizer (48%) to be part of the new normal for business travel.** This is compared to 55% of less frequent travelers who predict wearing masks and 53% who expect widespread hand sanitizer.

Masks are likely to be more common in APAC, where mask use was more widespread and accepted prior to COVID-19—65% of business travelers in that region predict they will wear a mask. **Travelers from the Americas (57%) and EMEA (45%)—where masks are less common—are not as likely to predict they will use masks.** The Americas, meanwhile, seem more interested in using hand sanitizer (59%, compared to 51% in APAC and 50% in EMEA).

COVID-19 INCREASES RISK OF DISCRIMINATION

Not every change to travel norms is one to be celebrated or emulated—some hold much darker implications. **The vast majority of travelers (90%) expect increased discrimination in the wake of COVID-19,** especially against travelers exhibiting cold or flu symptoms (59%), travelers from countries with high infection rates (49%)—and even travelers of Asian descent (32%).

Travelers also predict that there will be an increase in discrimination against those wearing enhanced personal protective equipment (27%) and the elderly (26%).

Interestingly, travelers from the Americas (41%) are more concerned about racial or ethnic discrimination against people of Asian descent (compared to 30% of APAC or EMEA travelers).



THE TRIP ITSELF IS NOW THE MOST STRESSFUL STAGE OF TRAVEL

While travelers are excited to return to work, the trip itself has begun to feel increasingly difficult: **More than 2 in 5 (45%) now say they experience the most stress during the trip**, rather than before (26%) or after the trip (29%). This is a 50% increase from last year, when just 30% said the same. This is especially true in APAC (48%, compared to 43% in the Americas and 43% in EMEA).

A company's policies and solutions make a key difference in how their employees experience travel stress. **Travelers from companies that do not use a TMC (48%) or an OBT (47%) are more concerned about the actual trip than those at companies using a TMC (42%) or OBT (43%).**



45% of business travelers find the **actual trip the most stressful stage**, an increase of 50% since last year (30%).

Safety is likely playing a big role in how travelers are feeling on the road. **Nearly 2 in 5 (38%) say their health and safety is their top priority while traveling for business—more than twice as many who say business needs (16%) top their needs.** Safety was travelers' top priority last year as well, but the effects of COVID-19 have exacerbated the issue leading to a jump from 31% to 38%. Business travelers from APAC (42%) and the Americas (40%) are even more concerned about health and safety than those from EMEA (33%) this year.

Given this stress, it stands to reason that **90% of travelers have concerns about resuming travel, especially the possibility of infecting family (55%) or getting sick themselves (53%).** Those living with children are especially concerned about infecting their family (58%, compared to 51% of those without children). Additionally, the trip itself is likely to be anxiety-inducing: among those with concerns, 51% are concerned about flying, followed by using public transportation (44%) and staying in a hotel (34%).

Travel is particularly stressful for APAC travelers, where 54% are concerned about flying, 48% about using public transportations, and 41% about using a hotel.

Those who travel 16+ times a year express the fewest concerns about returning: those who travel very frequently are less concerned about getting on an airplane (39%, compared to 52% of those who travel less frequently) or using public transportation (40%, compared to 45% of those who travel less frequently).

COMPANIES SHOULD CONSIDER THE CONSEQUENCES

Many travelers expect their company to make changes as well: **an overwhelming 96% consider some measures critical for safely returning to the road, especially mandatory personal health screenings for traveling employees (39%) and limiting travel to only the most critical trips (39%).**

More than
1 in 5 very
frequent
business
travelers



would look for a new position if their company *didn't* implement the travel safety measures they want.

Companies should take heed. Among those who see the need for changes, 45% say they would ask to limit travel if their company does not implement the measures they want—and **18% would look for a different position, including 8% who would consider a position at a different company.**

Not every traveler is looking to limit travel. **Those who travel very frequently (38%) are less likely to limit travel than those who travel less frequently (46%)—but they are more likely to look for a new position (22%) than less frequent travelers (17%).**

How Companies Can Help Their Travelers

To capitalize on their employees' excitement—and to ensure they minimize stress and safety concerns during the trip—companies should pay attention to what their employees say will make them more comfortable with resuming travel: training, tools and policies that reflect the new normal of business travel.

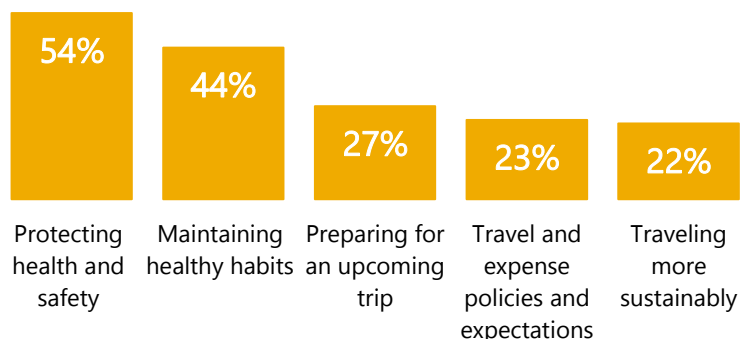
TRAVELERS SAY TRAINING CAN GO A LONG WAY

A powerful 94% of travelers say company trainings would be beneficial, especially trainings on how to protect their health and safety while traveling (54%) and how to maintain healthy habits while traveling (44%). This represents an increased interest in maintaining healthy habits from last year (37%), which is likely a result of increased attention on protecting health on the road.

Other popular trainings include travel and expense policies (23%) and traveling more sustainably (22%). **Training on preparing for an upcoming trip, including travel best practices are especially important to those who consider pre-trip approval critical (33% vs. 26% for those who don't).**



94% of business travelers believe they'd benefit from trainings including:



TRAVELERS WANT TECH THAT CAN KEEP UP

Travelers also want more from the technological solutions their company offers. **The most important mobile app features for when business travel resumes include traveler safety information (46%),** followed by mobile check-in (41%) and the ability to view and manage their trip itinerary (36%). Nearly a quarter (24%) want automatic notifications for out-of-policy bookings.

Real-time safety information is especially coveted in APAC (48%) and the Americas (48%), though a sizable 43% of EMEA travelers also agree.

Ultimately, travelers are looking to a broad swath of on-demand functions, including the ability to create and submit an expense report (25%) and even the ability to track and offset their carbon footprint (19%).

TRAVELERS EXPECT NEW POLICIES IN PLACE

Interestingly, 23% of business travelers also expect an increase in pre-trip approvals—something previously more common outside of the U.S. Among travelers who expect an increase in pre-trip approval, 33% say they would appreciate training on how to prepare for a trip (compared to 26% of travelers who do not expect pre-trip approvals).

TRAVELERS HOLD THEMSELVES ACCOUNTABLE—BUT THEIR EMPLOYERS AREN'T OFF THE HOOK

To make resuming travel as easy as possible, employers should consider their employees' needs, especially whether they have direct-booking solutions that travelers want to use. When travel starts, **travelers are most likely to start their booking directly with an airline or hotel website/app (22%),** with online travel agencies (21%), or with internet search engines (20%). Comparatively, only 19% expect to first use their company's travel booking tool and only 18% will go to their company's travel agency.

Booking directly is popular regardless of a company's travel policy: 25% of travelers with no written policies book directly, on par with the 24% of travelers with guidelines who book directly and the 20% of travelers with mandated policies who book directly. And, while employees might have their own sense of responsibility, they are not letting their companies off the hook.

A plurality of travelers (36%) hold themselves most accountable for protecting their own well-being once business travel resumes—but **18% say their employer will be most accountable**, as well as the government (13%) or transportation providers such as airlines.

Travelers also hold TMCs (10%) and lodging providers (5%) accountable—in other words, everyone has a part to play in making sure business travel returns in a safe manner. APAC travelers (20%) are more likely than those from the Americas (16%) to hold their employers accountable for their travel health and safety.

Conclusion

The changing face of travel represents challenges for companies—but more importantly, it also represents opportunities which their travelers are eager to seize.

The 2020 Business Travel Survey shows how successful travel should capitalize on key findings:

- Travelers expressed feelings of excitement for returning to business travel, along with worry. Overall, travelers expressed more positive emotions with the prospect of returning to the road than negatives. An overwhelming 97% expect changes to travel norms reflecting renewed interest in safety and well-being.
- With these changes in place, 45% of travelers now say the trip itself is the most stressful phase of travel, a 50% increase from last year.
- A meaningful 96% expect their employers to proactively take steps to improve traveler safety and lower the stress associated with travel.
- Companies must listen to employees and invest in solutions their travelers want, including measures they see as necessary when travel resumes, such as improved traveler safety information, requiring pre-trip approval, or greater ability to change travel plans quickly.

More than 1 in 5 business travelers expect to **book directly**, across regions.

22% in EMEA
book directly

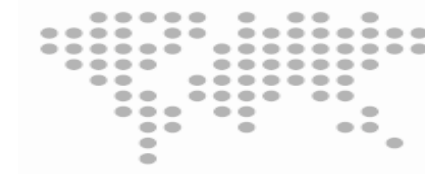


23% in APAC
book directly



21% in the Americas
book directly





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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 and Malaysia), Greater 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.



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