



**WAKEFIELD**

6<sup>th</sup> Annual  
**Global  
Business  
Travelers  
Report**

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# Executive Summary



The majority of business travelers (67%) consider hitting the road critical to their career, including 51% who also enjoy traveling for business. **But undercutting that enjoyment is cutbacks to flexibility, which 91% have experienced over the last year**, according to a survey of 3,750 business travelers in 24 global markets conducted by Wakefield Research on behalf of SAP Concur. These include not being allowed to spend a night to avoid a long day trip, not being able to opt for costlier preferred travel options like direct flights, and not being allowed to add personal travel to a business trip—or even traveling for non-client purposes, like conferences or training or internal staff meetings.

These hits to traveler flexibility may lead to increased tension with their employers. **Virtually all (92%) would decline a business trip for reasons like safety, social, or environmental concerns or the potential impact on their work-life balance.** And this pushback could come up against company priorities, given that 42% of travelers believe their businesses are prioritizing cost cutting over travel flexibility.

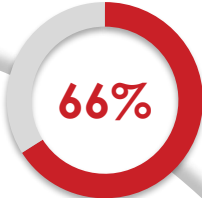
**There are some compromises, including “booking buffers,” the extra time that 86% of travelers see as necessary due to unpredictable travel delays.** This flexible travel option is in the company’s best interest to avoid missing important business meetings. It may also be overshadowed by the additional steps companies are implementing in an attempt to manage spending, including requiring pre-travel approvals. AI may offer a path forward, as business travelers are overwhelmingly open to it to lessen their administrative burdens. Yet this, too, comes with additional expectations of the company, primarily regarding training and data privacy.

At a time riddled with concerns over safety, costs, and sustainability, companies and travelers alike need to reach a new understanding of what flexibility is, and how to use it to achieve both of their objectives.

# Key Findings



of business travelers cite cuts to travel flexibility over the last 12 months.



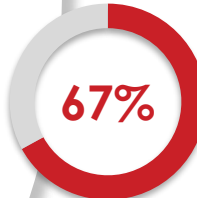
of business travelers feel they haven't received equal opportunity to travel.



of business travelers have been forced to make last-minute changes in the past year because of unexpected delays, cancellations, or the need to re-route.



of business travelers add time to the beginning or end of their journey as a proactive buffer for unexpected travel schedule changes.



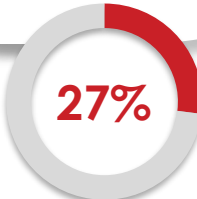
of business travelers have seen increased focus on requiring pre-travel approvals.



of business travelers are open to using AI-enabled options for booking their travel.



of business travelers would need company-provided support to make them feel comfortable using AI-enabled options for bookings.



of business travelers indicate their company has cut back on allowing employees to pay more to use more sustainable travel options over the past 12 months.



# Travelers vs. The Home Office

Companies and employees may find themselves increasingly at odds as the need for flexibility runs against businesses' desire to keep costs down. **In the last 12 months, 91% of business travelers have seen cuts to the travel flexibility their company allows.** For many, this includes tightening in key areas that aid their work-life balance and enable them to more easily manage stressful travel situations.

**More than a quarter (27%) note cuts to authorizing remote work during personal travel to avoid taking leave days, while 25% cite cutbacks on adding personal travel to their business trips.** Paring back on these recent additions to travelers' flexibility suggests companies may be seeking to reassess what is—and isn't—a must-have.

But employees are drawing lines in the sand, especially around their ability to take time for themselves. **More than one in five are willing to decline a business trip that doesn't allow them to extend the trip for personal travel (22%).**

As industries shift their spending, travelers no longer have the same options available to them, like booking business or premium class (27%) as well as areas that help them circumvent unruly travel schedules.

**Travelers have been asked to use public transportation instead of options like taxis or rideshares (27%), and for 28% their companies have cut back on more expensive non-stop flights or direct routes.**

This follows the 31% of travelers who last year reported their companies were emphasizing lower fares even if they included layovers or indirect flights.

Market instability affected travel last year, when 32% of travelers indicated their company was pushing for more same-day returns due to economic uncertainty. **This year, 28% have similarly seen a decrease in being allowed to stay overnight to avoid a long day of travel, suggesting the trend has continued.**

## Cutbacks to Flexibility Over the Past 12 Months



**28%**

Staying overnight to avoid a long day trip



**28%**

Paying more for a non-stop or direct flight



**27%**

Working remotely while traveling for pleasure to avoid taking leave



**27%**

Using taxis or rideshares rather than public transportation



## Opportunity Cost

For business travelers, the open road is more than just a perk: 67% assert it is critical for career advancement, a trend that holds true across the globe, from 64% of travelers in EMEA to 68% in the Americas and 72% in APAC. But not every traveler feels they are given the same chances.

**An alarming 66% of business travelers believe they haven't always had an equal opportunity to take business trips compared to their colleagues.**

This follows our 2023 study when 62% indicated unfairness was at play. Reasons for this vary, with 25% of Gen Z citing their age, while 20% join their millennial colleagues (20%) in suspecting seniority plays a role.

**Meanwhile, 16% of fully remote workers feel shortchanged due to how often they go into the office.**

LGBTQ+ travelers in particular think they are held back for troubling reasons such as physical appearance (20%, compared to



**2 in 3** travelers feel they **haven't always received an equal opportunity** for business travel compared to colleagues

12% of non-LGBTQ+ travelers) or gender (17%, compared to 11% of non-LGBTQ+ employees)—**and 20% believe they've been denied equal opportunity because of their sexual orientation.**

More than one in ten travelers (11%) think they haven't received the same opportunities due to their accent, while 10% feel it is due to their ethnicity or race.

**In addition, 13% of travelers who consider themselves a person with special needs believe the inequality they've faced is due to their disability.**

# Flexibility That Works for the Company

While companies may feel less obligated to accommodate travelers' flexibility requests in some areas, the potential business implications of cutting back on all options are crystal clear. **Eighty-eight percent of business travelers have been forced to take unanticipated steps like spending more time on a trip or using alternate transportation methods in the past 12 months because of unexpected delays, cancellations or the need to re-route.** This has had huge business impacts—including canceled or rescheduled meetings, which have affected 38% of travelers.

Dealing with these unprecedented challenges also adds to the strain on employees' work-life balance, leaving 29% willing to decline a business trip because of the likelihood of delays or cancellations. This willingness to say no comes from hard-won experience. **Unexpected travel ordeals have forced 57% to endure longer layovers or other unplanned delays in the past 12 months.**

## Unanticipated Steps Due to Travel Delay



**57%**

Longer layovers or additional, unplanned days



**38%**

Cancelled or rescheduled meetings

In an effort to bypass some of these challenges, travelers are adding “booking buffers”—extra time at the front or back end of their trip to accommodate potential delays or changes to their travel schedule. **The majority of business travelers (61%) proactively book extra time for their arrival to avoid missing meetings due to delays, while 46% book extra time for their departure to avoid stress on the return home.** More than a quarter (27%) include cushions on both sides of their business trip.

These buffers are a flexibility companies afford travelers, yet it is one that is in their own interest to avoid business interruptions. While 70% of business travelers indicate their company has shifted over the past year to allow employees to make more demands, it is undermined by the dwindling options and lower flexibility elsewhere. **Case in point: 42% believe their company is prioritizing cutting back on travel costs over meeting their employees' needs for flexible options.** This is consistent across all regions, including EMEA (44%), the Americas (41%) and APAC (38%).

Even further, **among employees who have not been able to make more flexibility demands, 50% believe cutting costs has been prioritized over their needs.** Travel managers, as well, are struggling with this problem as 42% foresee company directives to cut travel costs will make their job even more challenging over the next year. The fact may be that while employees feel empowered to ask for accommodations, seeing so many direct cuts to perks and benefits outweighs the sense that they are afforded more options.

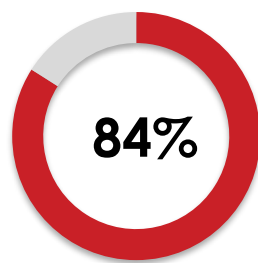


## Pre-approval Prevalence

An emphasis on cost cutting has businesses instituting more pre-approval requirements for travel expenses. **Two-thirds of business travelers (67%) note an increased focus at their company on pre-travel approvals that had not previously been required, including more than a quarter (27%) who have seen this implemented for all trips.** Coupled with the 17% who have always had these requirements, an overwhelming 84% must file for pre-travel approvals for at least some trips, with APAC leading the charge (89%), followed by the Americas (84%) and EMEA (82%).

While intended to keep trips on budget, adhering to pre-approved travel plans can be nearly impossible in an ever-fluctuating travel landscape. **More than a third of business travelers (36%) have incurred additional expenses on a business trip because of unexpected travel challenges, and 34% have had to use an alternate transportation method.**

Among travel managers, 38% anticipate a more difficult year ahead due to travelers not using company tools to book or update their travel plans—**yet 30% of travelers have been forced to book travel directly with suppliers due to unexpected challenges like delays, cancellations or the need to re-route.** The result? Managers lack visibility to track spend, negotiate supplier rates, enhance sustainability—or worse—ensure employee safety.



Must file for **pre-travel approvals** for at least some of their trips





# Who's at The Wheel

As businesses seek to put more parameters around both budget and flexibility, travelers are pushing back. **Nearly all (92%) are willing to decline a business trip for reasons like safety, social or environmental concerns, or the potential impact on their work-life balance.** In particular, 24% would decline a trip that lacked the flexibility they expect to make adjustments to the trip outside of company policy. But this is just one of the reasons travelers would put their foot down.



**24%** would **decline** a trip without flexibility to **make adjustments outside of policy**

Understandably, travelers are most willing to decline a trip that could put their wellbeing at risk. **More than two in five (44%) would refuse a business trip out of safety concerns about the destination,**

**while 33% are ready to decline if they are worried about their welfare depending on the mode of transportation.** Meanwhile, 35% would say no if the destination gave them political or social concerns, especially travelers in EMEA (36%) or APAC (36%). Given the increasing political upheaval, this figure is even higher than the 26% of travelers willing to decline a trip last year to avoid a region, state, or country with a government or culture they do not support.

This willingness to refuse travel has put company travel managers in a seemingly impossible bind: **More than a third of travel managers (36%) cite managing competing expectations of travelers and the company as a reason why their role will become more difficult in the year ahead.** The dilemma travel managers find themselves in has become emblematic of the broad push and pull between employers and employees about who gets final say on all matters of business travel.

## *Sustaining Sustainability*

Sustainability is a focus of not just individuals, but businesses as well. **For more than a quarter of business travelers (29%), their company is more focused on sustainable travel options than meeting employees' need for flexibility or cutting travel costs.** To some extent, this is a trend that travelers are on board with, as 27% would decline a business trip due to the environmental impact of the travel or the inability to choose sustainable options—a boundary held by travelers across the Americas (28%), APAC (28%), and EMEA (27%). Indeed, nearly a quarter (23%) cite recommendations for reducing carbon emissions as a critical element for their company's travel booking tool.

**On the other hand, 27% indicate their company has cut back on allowing employees to pay more to use more sustainable travel options over the past 12 months.** Travel managers have seen this trend as well, with 36% finding it difficult to successfully meet their company's expectations to provide more sustainable travel options without adequate travel budgets.

# AI on the Horizon

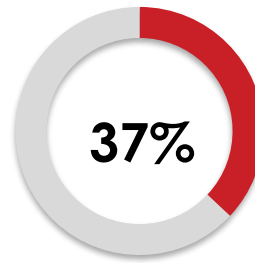
As with so many challenges businesses face today, the push-pull between travelers' needs and businesses' priorities may soon get some help: artificial intelligence (AI). **But while nearly all business travelers (95%) are open to using AI-enabled options for booking their business travel, just 7% are comfortable doing so now.** If businesses want to implement AI, they need to get employees on board with using it.

**Close to nine in ten business travelers (89%) require company-provided support to feel comfortable using AI-enabled options for bookings.** As media report on increasing concerns about privacy and potential bias due to human inputs skewing AI algorithms, travelers want assurances. Nearly half (48%) want to know their personal data will be protected, and 37% want to feel confident that the tools do not create any potential bias. Concerns about bias are most prominent in APAC (41%), compared to 36% of travelers in both the Americas and EMEA.

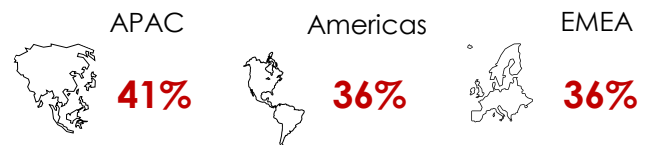
Employees are also looking for more tactical support, including nearly two in



**9 in 10** travelers require company support or training to **feel comfortable using AI-enabled options** for booking their business travel



**Want assurance that AI-enabled booking tools don't create potential bias**



five (38%) who want company-provided training on how to use AI-enabled options and a third (33%) who simply want the ability to use non-AI enabled tools if they'd prefer. **And some just want to know they're not going to get in trouble: nearly a third (32%) want company-provided assurances they won't face repercussions if the AI-suggested bookings don't comply with company policy.**

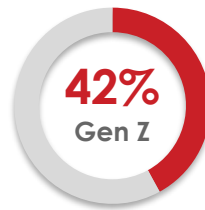
Businesses can tailor their AI-powered assistance to areas where employees need help: research and administrative tasks. **Travelers are most willing to consider using AI-empowered automation to provide guidance on wellbeing and safety (37%), visa and documentation support (37%), assistance capturing and reporting expenses (37%), and help finding sustainable travel options (37%)—all functionality businesses could implement to gain employees' trust and enthusiasm.**

Companies can also consider moving into other functions that could pique users' interest. **Nearly one in five business travelers (19%) would prefer an AI-curated list of business travel options based on their preferences and needs instead of taking a DIY approach or getting recommendations from a travel agent or their colleagues.**

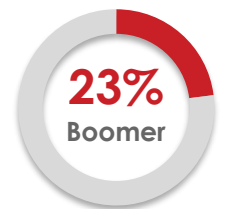
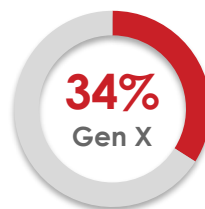
## Gen AI

Despite their reputation for being more tech-savvy, younger business travelers are more wary of using AI without the proper know-how. **Gen Z (42%) and millennial (40%) business travelers are most likely to require company-provided training on AI-enabled options for booking to feel comfortable using them, followed by Gen X (34%) and boomers (23%).** Indeed, 12% of boomers and 10% of Gen X are already comfortable using AI-enabled options for booking their business travel, while just 4% of Gen Z and 6% of millennials indicate the same.

Younger travelers may simply be doubling down on their desire for flexibility, as these generations want the option to use other tools instead. **Specifically, 36% of millennials want this, followed by 31% of Gen Z, 30% of Gen X but just 18% of boomers.** This may be another example of travelers wanting not just robust tools, but multiple options.



**Require company-provided training on AI-enabled options for booking to feel comfortable using them**





## Conclusion

Travelers are willing to make demands and put their foot down, requesting accommodation and turning down trips for a growing number of reasons. But this feeling of empowerment is being overshadowed by company cuts that feel more urgent and overwhelming, resulting in a perceived setback for travelers' work-life balance. While companies have implemented compromises such as booking buffers, travelers must wonder whether these are due to a willingness to help employees or the simple necessity of ensuring travelers can accomplish their business goals in the face of an increasingly complex travel landscape.

AI and AI-enabled tools may help companies allay some concerns, but more important than the tool is the reason for offering it: making travelers' lives easier while still positioning them to achieve and exceed their business objectives. This offers an opportunity for buy-in, as ultimately employees want AI and other solutions to help advance their objectives both for work and work-life balance.

# Methodological Notes

The Concur Travel Managers - Global Survey was conducted by Wakefield Research ([www.wakefieldresearch.com](http://www.wakefieldresearch.com)) between April 5th and April 26th, 2024, among 600 Travel Managers, defined as those who direct or administer travel programs for businesses, across 6 markets: Germany, Canada, Japan, ANZ Countries (Australia and New Zealand), UK, and U.S. 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 50.

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 4.0 percentage points in the global sample, 9.8 percentage points in the U.S. Healthcare oversample, and 13.9 percentage points in the U.S. Higher Education oversample, from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

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The Concur Business Travelers - Global Survey was conducted by Wakefield Research ([www.wakefieldresearch.com](http://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 3,750 interviews conducted in this study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 1.6 percentage points in the global sample, and 9.8 percentage points in the U.S. oversamples for Higher Education and Healthcare, from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

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The 2024 study included a shift in the markets surveyed compared to the previous year, which should be considered when comparing findings. Specifically, Austria, Middle East (UAE and Saudi Arabia) Portugal, and Switzerland have been added this year, while China, Dubai, Hong Kong, LAC (Columbia, Chile, Peru, Argentina), and Taiwan have been removed.



# WAKEFIELD

## Thank You

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