



WAKEFIELD

6th Annual
**Global
Travel
Managers
Report**

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Executive Summary



Feeling unappreciated, unsupported, and overburdened, travel managers are looking to the door. **More than two in five (41%) are likely to search for a new position in the next 12 months.** For those planning to stay, change is crucial and overdue. Business travelers expect flexibility and have become accustomed to going outside company policy when needed to support their safety, work-life balance, or adherence to social, political, and environmental values during their business travel. Yet 36% of travel managers are struggling to balance this with the competing expectations of their company for mandatory cost-cutting measures. At the same time, prioritizing sustainable travel options while offering the lowest-cost options is a recipe for stress.

With nearly all travel managers (99%) anticipating a more challenging year ahead, training and tools are two things they need more of, especially when asked to take on a more strategic role in the company, demonstrate ROI, and use AI-powered tools. While AI could provide some relief for these stretched travel managers, not all are eager to embrace it, with 34% struggling to use these tools without adequate training.

A Wakefield Research survey of 600 travel managers across six global markets for SAP Concur points to an uncertain future for travel managers if companies don't take steps to better align the tools and support they provide in these increasingly challenging roles.

Mounting Tension, Lower Motivation

Nearly all travel managers (99%) anticipate a more challenging year ahead. **For more than a third (36%), this bleak prediction is due in part to the struggles they face in managing the increasingly competing expectations of their travelers and their company.** They navigate a difficult path, trying to simultaneously serve both parties.

As the travel manager position continues to evolve, demands mount. They are asked to do more with less, specifically in the areas of sustainable travel, new technology, and taking on a more strategic role in the company without proper support. **Concerningly, nearly two in five (37%) find it difficult to continue delivering high-quality travel programs while under increased stress.** It's not just the stress of the role though—close to a third (31%) find it a challenge to remain

motivated when they feel undervalued by their company.

Company priorities reflect the pressure leaders are under to achieve a delicate balance among duty of care, sustainability, and the company's bottom line. Interestingly, managers are evenly divided when it comes to what their companies view as most important. **For more than a third (35%), their company is focused on meeting employees' demands for flexible travel options, such as allowing travel choices outside of company policy when employees feel it is necessary.** Yet for nearly as many the emphasis is on sustainable travel (33%) or cutting back on travel costs (32%). This trifecta offers a glimpse into the concurrent mandates across the industry that travel managers are trying to meet.

Amidst this turbulent environment, **41% are likely to look for a new job in the year ahead, including 20% who will look for a position outside of travel management altogether.** Yet even among those looking to remain in their current role, 41% intend to push for changes to that position, demonstrating that staying put won't necessarily equate to staying silent.



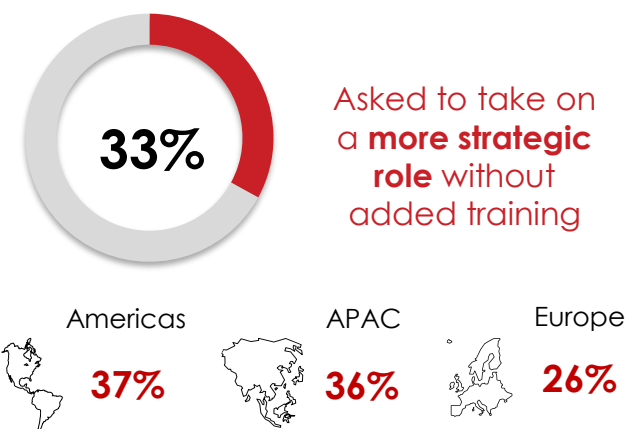
Good for Travelers, Good for Companies

The companies most likely to retain their travel managers are the ones prioritizing their travelers. **Among travel managers planning to stay put without advocating for change—certainly the happiest of the travel managers—41% indicate their employer is emphasizing meeting employees' demands for flexible travel options above cutting costs or sustainable travel.** In contrast, far fewer travel managers looking to remain in their current position as-is say their company's primary focus is either sustainable travel (30%) or budget cuts (29%), rather than meeting employee needs.

Colliding Expectations, Lagging Support

Nearly all travel managers (99%) experience disconnects between the tasks their company expects them to perform and the tools, support, and budget provided, leaving them feeling like success is a challenge. Managers are asked to demonstrate ROI, yet do not have the right data and tools to accomplish this (34%). **Equally as concerning, a third (33%) have been asked to take on a more strategic role but were not provided with additional training or education.** This divide is felt most strongly among travel managers in the Americas (37%) and APAC (36%), while fewer in Europe (26%) experience this dilemma.

More Strategic Role, Same Training



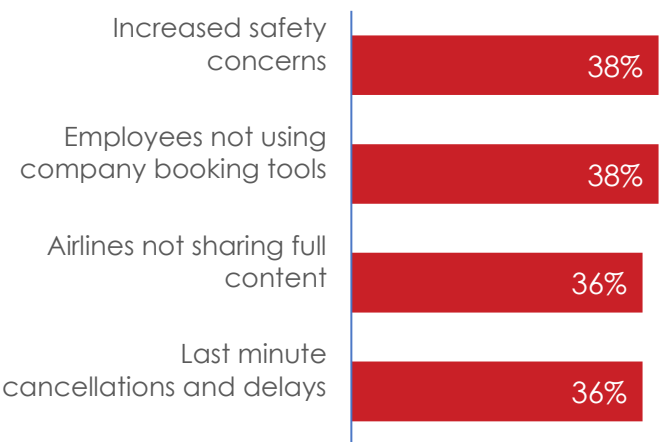
Against the backdrop of intensifying worldwide conflict, 38% of travel managers cite increased safety concerns amidst geopolitical tensions as a challenge for their role this year. **Despite this, nearly two in five travel managers (37%) are expected to support travelers’ duty of care without visibility into all travel** – a predicament that no doubt adds to their stress.

Part of the struggle is ensuring employees can meet business travel objectives while up against unanticipated changes to schedules. An alarming 88% of business

travelers have been forced to take unanticipated steps in the past 12 months because of unexpected delays, cancellations, or the need to re-route during business travel. **More than a third of travel managers (36%) cite these all-too-frequent, last-minute flight changes and cancellations as a factor that will make their role more difficult this year.**

Navigating these challenges within the industry is made even more difficult by the actions travelers take in the moment. A majority of business travelers (64%) prefer to make changes to their reservations through the airline, hotel, or car rental company directly, oftentimes leaving travel managers in the dark about changes until after the fact. **For 38% of travel managers, employees not booking or updating travel plans using company tools is yet another factor they anticipate making their job harder in the year ahead.** Airlines not sharing full content from traditional channels can make direct booking a preferable option for travelers—which may contribute to why 36% of travel managers cite this as an added burden in the next 12 months.

Challenges for The Year Ahead



Budget, Tools Leave Managers Uncertain

While controlling travel spend is top of mind for travel managers, frequent flight changes, geopolitical problems, and economic uncertainty make this tough to manage. **More than two in five travel managers (42%) – including close to half of those in APAC (48%) – anticipate company directives to cut travel costs amidst ongoing challenges will make their job more difficult in the next 12 months.**



42% expect company **cost cutting** directives

A front-burner issue for all industries, sustainability is a particular complication when it comes to travel budgets. Nearly two in five travel managers (39%) will face the obstacle of new or increasing sustainability regulations and requirements this year. **And, more than a third (36%) are finding it difficult to be successful in meeting company expectations for more sustainable travel options without adequate travel budgets.** For about a quarter of business travelers (27%), their

company has cut back on allowing them to pay more to use more sustainable travel options over the past 12 months.

For some, outdated or fragmented company tools are making this even more demanding—31% of travel managers find successfully managing travel spend difficult because they don't have access to all travel and expense data. The evolving nature of supplier discounts also presents a hurdle. **More than a quarter (27%) cite the expectation to negotiate travel discounts despite economic and industry changes outside of their control as a barrier to being successful in their role.**

AI Could Help, But Only If Training Is Provided

A majority of travel managers (64%) would like to see AI-enabled components incorporated into the tools they use to book travel. **About a quarter are bullish on using AI to automate as many tasks as possible (24%), including 33% of executives and 19% of non-executives.** Another 40% are more comfortable with automating only the repetitive tasks.

Yet this perceived benefit could become a challenge if companies don't provide the necessary guidance. **More than a third of travel managers (34%) believe their potential for success is being limited by their company's expectation to adopt AI-powered tools without training.** Business travelers also require training on AI tools (38%), as well as company assurances such as data protection (48%) or lack of bias (37%).

In contrast to the 95% of business travelers who are open to using AI-powered automation for booking travel, **36% of travel managers aren't interested in AI-enabled components being incorporated into their booking tools at all,** including 4% who don't want AI used in their role out of fear it could replace them altogether.

Conclusion

Business travel is gripped by a growing number of obstacles, from cancellations to global economic volatility. Travel managers feel unsupported and stressed as they straddle the line between company demands for efficiency and cost-effectiveness and the employees counting on them to ensure a safe and manageable travel experience.

If companies don't make a series of overdue changes to both ease the job of their travel managers and ensure they feel appreciated along the way, the next 12 months may see a steady exit as many head to more responsive competitors, or even new careers. To retain travel managers, companies must provide them with realistic options and upgraded tools that allow them to manage the increasing demands of their role. By supporting travel managers' efforts instead of forcing them to choose among ensuring travelers' safety, meeting sustainability requirements, and avoiding budgetary concerns, companies can foster greater loyalty from their travel managers.

Methodological Notes

The Concur Travel Managers - Global Survey was conducted by Wakefield Research (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.

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 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.

A woman with curly hair is shown from the side, working at a desk. She is holding a smartphone in her hands, looking at the screen. A laptop is open in front of her, and a cup of coffee is on the desk. The background is a red overlay with a white geometric pattern.

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Thank You

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