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SAP Concur

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Executive Summary

For business travel to provide the best return on investment, there should be a balance between the needs of the business and the needs of the traveler: in exchange for long hours worked and many miles logged, the business traveler wants to feel fully supported. Today's business travelers want access to the latest technology to help them be both productive and safe while on the road. Technology has become an integral part of how business travelers manage each stage of their trip—and indeed their lives—but employees are feeling that the tech provided by their employer is lagging. Today's professionals expect the flexibility to book, plan, change, file expenses or check-in for business trips through a wide variety of platforms of their own choosing, quickly and easily, so that they can go about the business of *actually* doing business. But often business travelers feel out of step with the home office, even on matters as urgently important as safety on the road.

Given the cost and importance of business travel, alignment between employees and the businesses they represent is critical. **To better understand the challenges employees face while traveling, SAP Concur commissioned a survey of 7,850 business travelers— defined as those who travel for business 3+ times annually—from 19 global markets: Australia, Belgium, Brazil, Canada, China/Hong Kong/Taiwan, Denmark, Finland, France, Germany, India, Japan, Luxembourg, Mexico, Netherlands, Norway, Singapore/Malaysia, Sweden, U.K., and U.S.**

While administrative inconveniences present problems for today's business travelers, personal safety is top of mind. Unfortunately, business travelers don't believe their companies are prioritizing their safety and wellbeing. A plurality of business travelers (31%) say safety is their top priority on the road. **Yet, over half of business travelers (54%) at companies with a formal travel policy say their safety is *not* one of their companies' top priorities.** When comparing employees' top priorities with their employers', nearly 2 in 3 (65%) report feeling out of step.

And while businesses are investing in solutions to improve their employees' experience, business travelers still see room for improvement: 2 in 3 business travelers (67%) believe their company lags behind when it comes to adopting the latest technologies to make business travel easier, including a third (33%) who agree *strongly*.

Business travel is ultimately a time and labor-intensive proposition—one that requires a significant commitment and investment by both the employer and the employee in order to reap potential benefits. This survey examines the relationship between employer and employee through the lens of business travel, demonstrating that from administrative tasks to safety issues, business travelers are quick to name the solutions they want and that their employers should strive to provide.

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Help Wanted: Business Travelers Need More from Their Business Travel Solutions

Battling Stress

Business travel management is a complex endeavor for any business, with companies developing policies to maximize traveler satisfaction while also increasing their own visibility and saving time and money for the company. Globally, more than 9 in 10 (94%) business travelers describe their company's travel policy as either structured (58%) or somewhat structured (36%). But even business travelers at companies with a policy still experience stress on the road.

When asked about which phase of the business trip is the most stressful—before, during, or after— nearly 2 in 5 (37%) business travelers said they were most stressed before, when they had to plan, book and organize the trip. After the trip came in a close second, with 1 in 3 (33%) business travelers saying that catching up on emails and filing expense reports was the most stressful stage.

Most business travelers are most stressed *before* or
after a business trip

Before the Trip	During the Trip	After the Trip
37%	**30%**	**33%**

When it comes to what it is that makes the period after the trip so stressful, business travelers are quick to single out one particular task as one they are loathe to do: expense reporting. In fact, given a choice between filling out an expense report and getting a cavity filled, nearly 1 in 4 (24%) say they'd rather go to the dentist and endure that pain than spend any more time itemizing expenses and tallying receipts.

Globally, younger employees in particular loathe paperwork, with Gen Z (32%) leading the charge and Millennials (24%) not far behind; Boomers, meanwhile, are the least likely to say they would rather take a trip to the dentist (20%).

Of all the frustrations of business travel, expense reports are a common pain point for road warriors. When asked which was more likely—their plane leaving on time or their expenses being reimbursed on time—business travelers were evenly split between being more optimistic about expenses (51%) and their flight (49%).
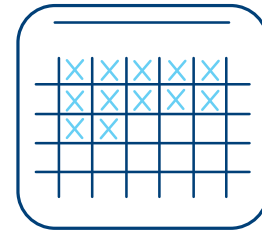

24% of business travelers would rather have a *cavity filled* than have to fill out expense reports

Jokes aside, delays in getting reimbursed for business travel expenses is a big problem. When asked about the longest length of time it has taken to be reimbursed for their expense report, business travelers report an average 12-day wait. Furthermore, a quarter (25%) of business travelers report that they have waited 15 days or more. The delay is even longer in Norway and France, with an average lengthiest delay of 17 full days.

But for many business travelers, the problems surrounding reimbursements isn't just a matter of when—it is a question of if they will get reimbursed at all. **More than 2 in 5 (43%) business travelers worldwide were not reimbursed for an expense in 2018, either because they thought it was not worth reporting or because their company failed to reimburse them for it**.

Business travelers are reporting an average of 12 business days as the *longest* it has taken to have their expenses reimbursed

This was especially prevalent in the Americas (48%), with over half of Canadian business travelers (54%) forfeiting expenses in 2018; by country, business travelers in Luxembourg (68%)[1], Australia (57%) and India (55%) were most affected.

And business travelers are forfeiting a significant amount of money. The average reported by business travelers who were not reimbursed in 2018 is a whopping $893.

Technology: A Solution at Hand

While businesses have struggled to deliver the best solutions to their employees, business travelers have tapped into the wide marketplace of solutions for business travel and are opting to use multiple solutions: more than half (53%) are using 2 or more platforms when booking their travel, including a quarter (25%) who use 3 or more.

Their reasons for doing so vary according to the platform: online travel agencies/sites were the most used (57%), with more than 3 in 5 (62%) business travelers who use them citing their better prices and the majority (61%) doing so because they are more convenient. Half (50%) of business travelers like to book directly, with nearly 3 in 5 (56%) of those who do saying they do so because it is more convenient. More than 2 in 5 (41%) use their company's travel agency or travel department, with 3 in 5 (60%) also citing that it is more convenient, and nearly half (46%) say they do so for the ability to talk to a real person.

More than half of business travelers are using *2 or more* booking platforms

53% of business travelers use multiple booking platforms

1 tool	2 tools	3 or more tools
47%	28%	25%
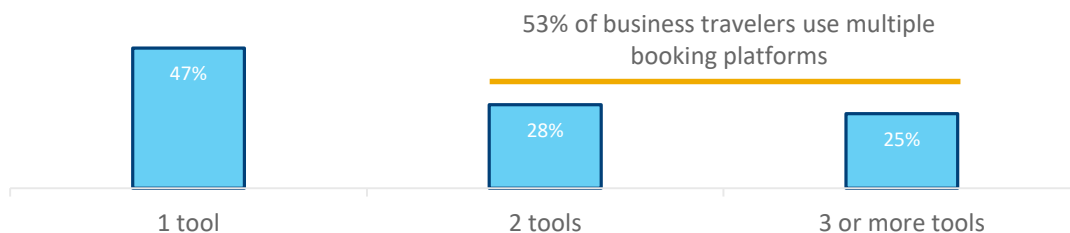
Online booking tools are particularly popular with frequent business travelers, with 43% saying they like to use them (compared to 31% of those who travel less frequently). Furthermore, international business travelers are also more likely to use online booking tools (33%) than those who travel only domestically (19%). Meanwhile, those who use online booking tools are particularly enthusiastic about the benefits: 2 in 3 (66%) use their online booking tool report liking it because it has better information, and nearly as many because it's more convenient (65%) or for the better prices (64%).
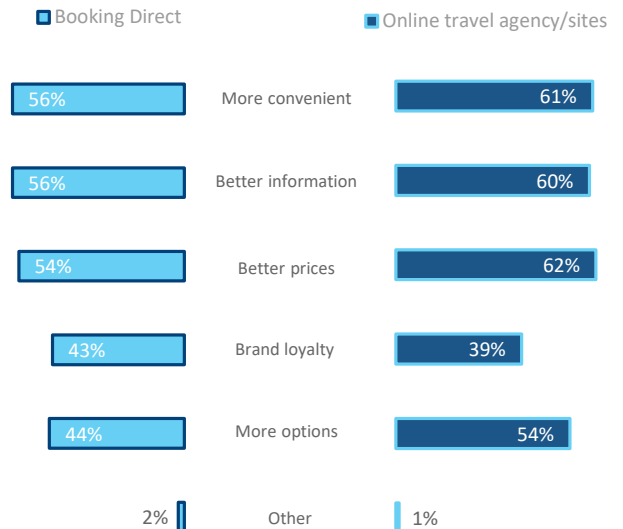
[1] Small base size; directional findings only.

But even business travelers who have an online booking tool at their disposal still continue to look elsewhere, with the majority (62%) booking through online travel agencies/sites (compared to 49% of those without online booking tools). More than 2 in 5 (43%) with an OBT are still booking through their companies' travel agency or department, compared to 34% of those without OBTs. In fact, 2 in 3 business travelers whose companies have an OBT (67%) use more than one booking method—more than double the rate of business travelers at companies without an OBT (30%). This seems to indicate that while OBTs might elicit more enthusiasm for their benefits, no single tool is more valuable to a business traveler than the flexibility to pick and choose from the options available in the marketplace.

Businesses should look for technology which ensures they have visibility into employee travel, regardless of where it is booked. Additional flexibility reduces stress for the traveler, and the travel manager can still perform duty of care functions to keep travelers safe, and receive their negotiated corporate discounts.

Many business travelers book through external platforms in search of *convenience* and *better prices*

(Top benefits among those who like to use each tool)

■ Booking Direct   ■ Online travel agency/sites

|	Booking Direct		Online travel agency/sites
More convenient	56%		61%
Better information	56%		60%
Better prices	54%		62%
Brand loyalty	43%		39%
More options	44%		54%
Other	2%		1%

Integrated travel and expense technology can help ease the post-trip burden on travelers by automatically creating the expense report while the employee is on the road, so that when they return to the office, they only need to review, and submit.

With so many options available to them, business travelers are quick to compare their companies' own solutions and find them lacking. More than 2 in 3 business travelers (67%) believe their company lags behind when it comes to adopting the latest technologies to make business travel easier, including a third (33%) who agree strongly. This is especially true in Asia-Pacific, where 70% agreed (compared to 65% in the Americas or Europe), with business travelers from India (77%) and China/Hong Kong/Taiwan (73%) the most likely to feel behind. And globally, younger employees are most likely to say their company lags: more Gen Z (68%), Millennial (69%) and Gen X (66%) business travelers feel like their tech is behind the time compared to Boomers (56%).

Business travelers who say their companies are behind in technology name tools for *booking and expense reporting* and *travel safety* as the areas that need the most improvement

(Among those who believe their companies are behind in adopting the latest business travel technology)

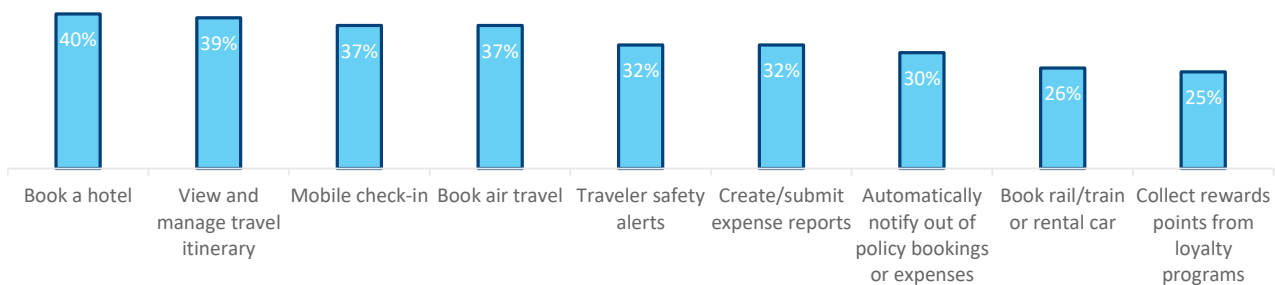| Booking and expense reporting tools	Travel safety tools	Itinerary management tools	Virtual payment tools
58%	52%	50%	48%
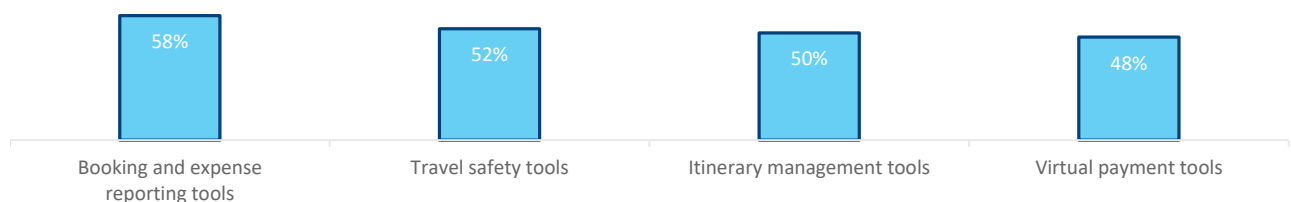
And business travelers are not shy about where they see their company failing to keep up with technological advances. **Business travelers who say their companies' tech is lacking say they are most behind when it comes to booking and expense-reporting tools (58%), as well as travel safety tools (52%)—highlighting the necessity of addressing both in order for businesses to build and grow their relationships with their employees.**

While these are the most popular features business travelers want to see improved, half (50%) also say itinerary management tools and nearly as many (48%) say virtual payment tools—showing that, just as business travelers cast a wide net for booking tools in order to capture a variety of benefits, they also want to see a variety of features and benefits in their business travel tools.

Business travelers are also keen to cite a variety of features that they most want from business travel mobile applications. The most important features business travelers want to see in a mobile app are the ability to book a hotel (40%) and the ability to view and manage their itinerary (39%), followed closely by both mobile check-in (37%) and the ability to book air travel (37%).

Business travelers' *most important* features to have in business travel mobile applications

Book a hotel	View and manage travel itinerary	Mobile check-in	Book air travel	Traveler safety alerts	Create/submit expense reports	Automatically notify out of policy bookings or expenses	Book rail/train or rental car	Collect rewards points from loyalty programs
40%	39%	37%	37%	32%	32%	30%	26%	25%

Travel safety tools are markedly more important in Asia-Pacific (61%) compared to the Americas (52%) and Europe (46%), with Singapore/Malaysia (67%) and India (66%) restating their elevated concern for safety. Furthermore, these safety-oriented countries are also the most likely to cite booking and expense-reporting as areas where their company can improve, with Asia-Pacific (64%) more focused than the Americas (57%) or Europe (53%), driven by familiarly cautious stalwarts Singapore/Malaysia (69%), India (67%) and China/Hong Kong/Taiwan (64%).

Other important features include traveler safety alerts (32%), expense reporting (32%) and automatic notifications for any out-of-policy bookings or expenses (30%). Most tellingly, 73% selected booking features as the most important feature mobile apps used for business travel should have, mirroring findings that cite the importance of improving this feature among business travelers who find their companies' business travel technology lagging behind.

Despite the popularity of modern tech solutions, a surprising number of business travelers are still going out of their way to get a direct human connection. More than a quarter of business travelers (28%) would rather rebook canceled travel arrangements over the phone than online. This finding highlights the importance of flexibility and suggests employers need to take their employees' desire for different options into consideration when selecting business travel solutions.

All Companies, Big and Small

A desire for technological solutions is especially appealing at smaller companies, where employees already feel their companies lag behind. Business travelers at companies with fewer than 1,000 employees are more likely to say their company is behind in adopting the latest technologies to make business travel easier (70%) when compared to business travelers from companies with 1,000+ employees (62%). The lack of booking tools is further evidenced by what business travelers from smaller companies want from their employers: they are more interested in training on how to book cost-effective travel (47%) than business travelers at larger companies (41%).

Companies of different sizes face different challenges when it comes to forfeited expenses. While employees at companies with 1,000+ employees are slightly less likely to have forfeited expenses (41%) than those at smaller companies (45%), the average amount they forfeited was higher: $1,089 at large companies compared to the average of $776 at smaller companies.

This further demonstrates the degree of difficulty faced by companies seeking to engineer the ideal employee experience. From large companies with myriad resources to smaller companies with fewer staff to manage, business travel expense reporting and reimbursements present a real problem that adds up to a lot of lost money for employees.

Safety First

The business travelers' desire to have multiple options for booking and rebooking travel is driven by more than just a desire for convenience, it is also driven by their own experiences. Nearly 3 in 5 (58%) business travelers have changed their travel accommodations specifically because they felt unsafe, including nearly 1 in 3 (31%) who have done so more than once. This is especially common in Asia-Pacific (63%) and the Americas (63%) and less common in Europe (51%). Business travelers in Luxembourg (82%)[1], Australia (77%) and Canada (70%) are the most likely to have changed their accommodations out of concern for their safety.

58% of business travelers have *changed accommodations* because they felt unsafe
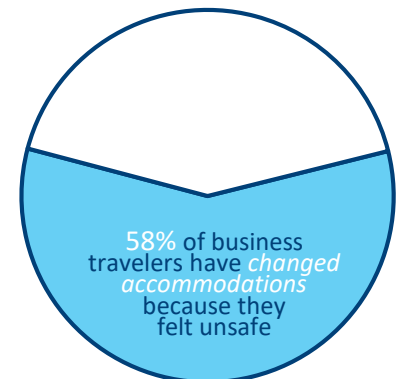
Female business travelers are especially attuned to safety concerns when traveling, in part because of experiences they have actually had. More than 3 in 4 (77%) female business travelers have had a negative experience related to their gender, most commonly being asked if they're traveling with their husbands (42%), being ignored by service workers (38%), having fellow business travelers assume they are hotel employees (31%) or being catcalled (31%). These experiences are especially common among women who travel internationally (84%) compared to those who travel domestically (69%).

LGBTQ+ business travelers are much more likely to have changed their accommodations because they felt unsafe (85%, compared to 53% of non-LGBTQ+ business travelers). This could be because LGBTQ+ business travelers often find themselves in the position of disguising their identity while traveling. **Nearly all (95%) of LGBTQ+ business travelers have hidden their sexual orientation for traveling, especially for safety (57%) or because they felt it would be easier to get work done if they hid their sexual orientation (54%).** Over half have hidden their sexual orientation to protect their privacy (51%) and nearly as many (46%) were concerned about anti-LGBTQ+ laws in the region they visited.

[1] Small base size; directional findings only.

In addition to changing their accommodations, another regularly employed safety tactic used by business travelers can be found in their pocket: their cell phones, specifically the location-sharing function. More than 9 in 10 (91%) business travelers have shared their location while traveling, with safety (58%) being the most common reason.

When it comes to safety, business travelers are looking to their employers to take the lead: business travelers believe safety trainings would be the most important educational tool an employer could provide (52%), a topic that outranks travel prep (49%) and booking travel (44%). Expense reporting (42%), sustainable travel (39%) and use of the company travel booking tool (37%) were less popular choices. At first glance, the two most desired types of training may not seem related to one another—but in actuality, they point to the two most top-of-mind issues business travelers face, and speak to a need for an integrated solution that can address both. Consider the leading reasons business travelers say they like to use various booking methods—regardless of which method, a majority of business travelers say they like them for the better information: online booking tools (66%), online travel sites or agencies (60%), booking directly (56%) or their company travel agency or department (51%). This better information includes descriptions of hotels and airlines that allow business travelers to make a decision about which accommodation is best—and the safest—according to their priorities.

Conclusion

Business travelers work in high-stress environments, and this difficult work can reap high rewards for both the employee and their employers. Given the importance of this work, employers owe it to their employees to equip them with the very best tools available, to increase efficiency before, during and after their trip, and to improve safety. For business travelers, this means providing business tools that reflect their need for top-of-the-line solutions and give them the flexibility they want while navigating their own difficult work. And while employers compartmentalize paperwork or reporting away from safety concerns, these two priorities influence one another—ultimately impacting employees' wellbeing and their travel experience. Demonstrating proficiency in one can ensure that employers can reassure employees of their commitment to the other.

The key takeaways from this global survey are:

1. **Safety is top of mind for business travelers worldwide.** This assertion by business travelers is further illustrated through the actions they take in the name of safety and security.
2. **Employees want the flexibility and convenience to book their business travel however they want,** even when they have an online booking tool. Business travelers want to choose from a variety of methods in order to maximize the benefits of the many solutions available to them.
3. **Tech is driving employees' desire for both flexibility and convenience, as well as safety**—pointing to a single integrated tool as the best way to meet their needs. There is a desire for consumer-grade applications that meets the needs of the modern business traveler and companies owe it to their staff to provide the best solutions they can.
4. **Better travel solutions will create happier and more dedicated employees.** Satisfied employees are more productive in the short term and more likely to stay with the company in the long term.

By showing their commitment to their employees—on business travel issues both large and small— companies can take steps toward developing and nurturing a relationship of trust and empathy that benefits all.

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METHODOLOGICAL NOTES

The SAP Concur Survey was conducted by Wakefield Research (www.wakefieldresearch.com) among 7,850 business travelers, defined as those who travel for business 3+ times annually from the following markets: Australia, Belgium, Brazil, Canada, China/Hong Kong/Taiwan, Denmark, Finland, France, Germany, India, Japan, Luxembourg, Mexico, Netherlands, Norway, Singapore/Malaysia, Sweden, U.K., and U.S. 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 Australia, Belgium, Brazil, Canada, China/Hong Kong/Taiwan, France, Germany, India, Japan, Mexico, Netherlands, Singapore/Malaysia, U.K., and U.S., 6.9 percentage points in Denmark, Finland, Norway, and Sweden, 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.