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GLOBAL TRAVEL MANAGER REPORT

JUNE 2021

Travel Managers Prepared to Clear the Runway for Takeoff

Travel managers grasp that change is needed to make corporate travel work and they have identified areas of focus for implementing new policies. **Nearly all travel managers (99%) expect challenges in the next 12 months, and the top one is communicating and ensuring compliance with new and revised travel policies (60%),** followed by last-minute changes or cancellations to bookings (53%) and changes to government regulations (51%). A key issue will be navigating the complexities of an ever-changing travel landscape.

Travel managers in the Americas and Europe are almost twice as likely to expect changes to government regulations as in APAC.



60% in the **Americas** anticipate changes



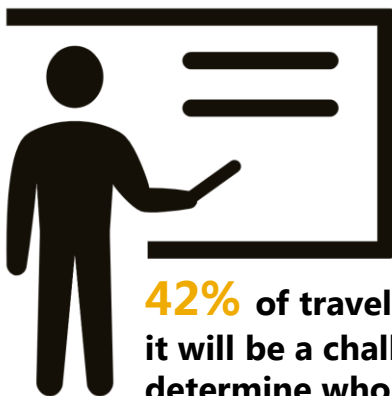
58% in **Europe** anticipate changes



31% in **APAC** anticipate changes

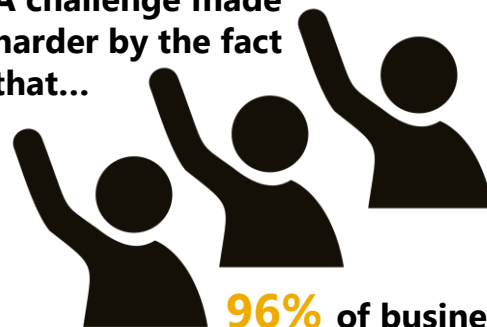
New policies empowering business travelers could produce logistical issues for travel managers. Nearly half of travel managers say their jobs are more challenging because of travelers wanting to select alternatives to air travel (49%) and having different preferences on where they'd like to stay (49%). This expectation aligns with the fact that business travelers are now prioritizing flexibility (72%) when it comes to business travel.

Travel managers face balancing the vital need for increased travel with the realities of travel budgets that haven't returned to pre-COVID-19 levels. They acknowledge internal challenges such as increased difficulty in deciding who gets to travel (42%) and reduction of travel budgets (36%). Choosing who gets to travel is even more difficult when taking into account the 96% of business travelers who are willing to travel for work.



42% of travel managers say it will be a challenge to determine who gets to travel.

A challenge made harder by the fact that...

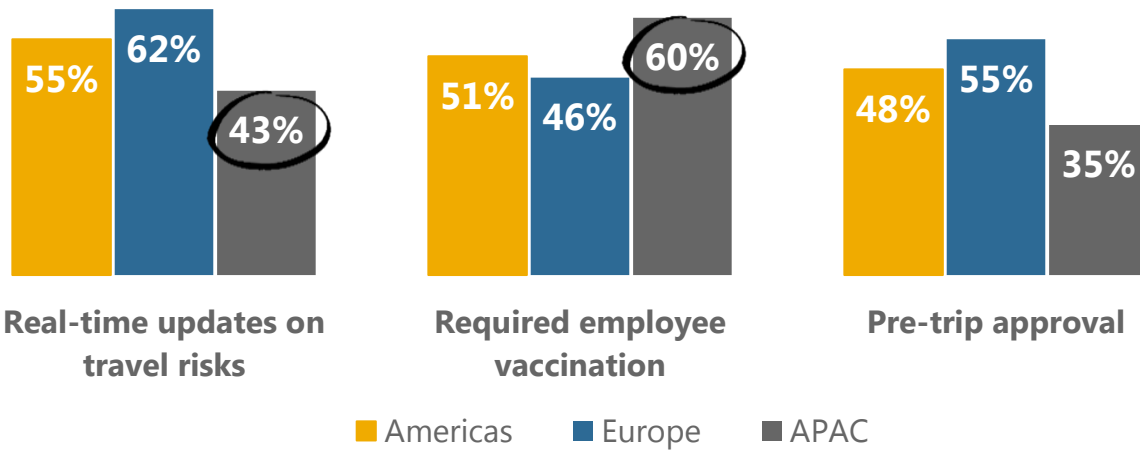


96% of business travelers are willing to travel.

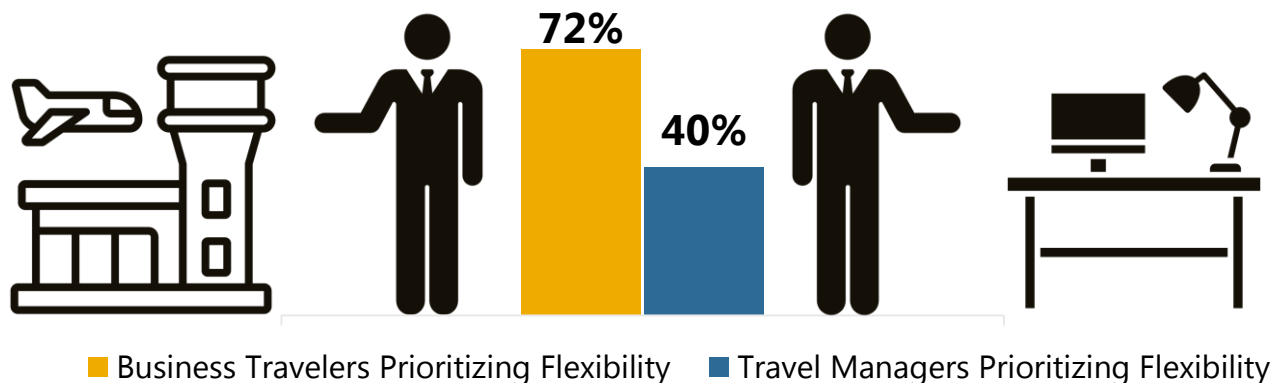
The travel policy pivot also will occur rather quickly. **All travel managers (100%) expect changes to travel guidelines or policies in the next 12 months.** The top policies are real-time updates and alerts on potential travel risks (54%) and requiring employees to be vaccinated before travel (51%). Last year, slightly over a third (35%) of travel managers expected their company to implement pre-trip approval for the long-term. **A year later, however, the expectation that their company will implement pre-trip approvals has risen to nearly half (47%).**

Upcoming Travel Policies to be Implemented

APAC travel managers are *more likely* to implement required employee vaccination, but *less likely* to implement real-time updates.



Interestingly, while 72% of business travelers prioritize flexibility when it comes to feeling comfortable while traveling, only 40% of travel managers say their company will implement increased travel flexibility in the next 12 months, demonstrating that employers' priorities may not be aligned with their employees.





The COVID-19 era has reinforced travel managers' responsibility to do all they can to keep business travelers safe and secure. **Nearly half of travel managers expect enhanced duty of care policies (47%) as well as allowing booking at supplier websites (46%).** This is in line with the 39% of business travelers who find it essential to have the ability to book travel directly on supplier websites.

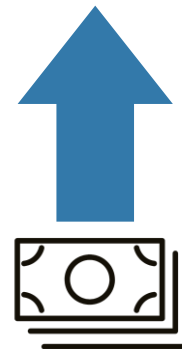
Anticipated increases in travel budgets may come with restrictions. **Nearly all (98%) travel managers expect their company's travel spending to increase in the next 12 months, and on average, they expect travel spending to increase by 30%.** Despite this, over 2 in 5 (44%) still say their company will limit travel to business-essential trips, creating some possible tension with the 68% of business travelers who want to travel for business in the next 12 months.

Travel managers expect travel for client meetings to be considered the most essential. **A majority say their company will prioritize new sales meetings (52%) and meetings with existing clients (52%) in the next 12 months.** This is followed by travel for internal executive-level meetings (42%) and industry conferences, exhibitions or events (38%).



And...

They expect an average spending increase of 30%



Company executives are ready to meet in person again, with those in the Americas and Europe more likely than in APAC.



50% in the Americas expect prioritization of executive-level internal meetings



46% in Europe expect prioritization of executive-level internal meetings



31% in APAC expect prioritization of executive-level internal meetings



Spotlight on Sustainability

COVID-19 may have ground travel to a halt, but travel managers pushed ahead with sustainability adjustments to policy. **Over two-thirds (69%) of travel managers say they've made updates to have a greater focus on sustainability and another 22% say they plan to make such changes in the next 12 months.** Stronger ties to their communities may be fueling smaller companies' greater push for sustainable travel; smaller companies are more focused on the goal of sustainable travel (77%, compared to 62% of larger companies).


Certain markets took advantage of the lockdown to move toward more sustainable travel. Travel managers in APAC (77%) are more likely than their counterparts in the Americas (67%) and Europe (66%) to have updated their travel policies or guidelines.



And the environmentally friendly moves are likely to be welcomed by business travelers. **Nearly 2 in 3 (63%) expect to make more sustainable changes to their travel habits,** including 32% who will prioritize trips with shorter distances, 31% who will avoid layovers and 26% who will prioritize alternatives to air travel.

Conclusion

While travel managers demonstrate that their companies are adapting to the changing travel norms, they also need to prioritize flexibility moving forward. To do so, travel managers will move into an even greater strategic role in their company as they secure buy-in from leadership.



A return to responsible travel will produce numerous challenges for travel managers. They must address issues such as regulatory compliance, budget and more robust duty of care as part of meeting travelers' greater expectations.

Travel managers need tools and solutions that will allow them to meet business priorities and provide business travelers with the increased flexibility that they desire. Achieving that balance will be essential in a business world with new expectations.



ABOUT WAKEFIELD RESEARCH

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For additional insights from prior studies, visit: [Global Travel Manager Report 2020](#)



METHODOLOGICAL NOTES

The SAP Concur Survey – Business Travelers was conducted by Wakefield Research between April 15th and May 10th, 2021, among 3,850 Business Travelers in 25 Markets: US, Canada, Brazil, Mexico, LAC (Colombia, Chile, Peru, and Argentina), UK, France, Germany, ANZ region (Australia and New Zealand), SEA region (Singapore and Malaysia), China, Hong Kong, Taiwan, Japan, India, Korea, Italy, Spain, Dubai, Benelux (Belgium, Netherlands and Luxembourg), South Africa, Sweden, Denmark, Norway and Finland. The data has been weighted to ensure reliable representation of the business traveler population in each market. The overall margin of error for this study is +/- 1.6 at the overall level, at 95% confidence.

The SAP Concur Survey – Travel Managers was conducted by Wakefield Research between April 15th and May 10th, 2021, among 700 Traveler Managers in 7 Markets including US, Mexico, UK, France, Germany, SEA region (Singapore, Malaysia) and Hong Kong. The overall margin of error for this study is +/- 3.7 at the overall level, at 95% confidence.



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