



GLOBAL BUSINESS TRAVEL



TRAVELER 360°

A research report
from American Express
Global Business Travel

American Express Global Business Travel (GBT) is a joint venture that is not wholly owned by American Express Company or any of its subsidiaries (American Express). "American Express Global Business Travel," "American Express," and the American Express logo are trademarks of American Express and are used under limited license.

In November and December of 2017, American Express Global Business Travel (GBT) partnered with research firm GfK to conduct an international survey of business travelers across the United States, the United Kingdom, France, Germany, Australia, India, and Singapore.

This research uncovered valuable insights into the opinions and behaviors of business travelers, a group of people with unique needs and concerns that are sometimes overshadowed by their employers' company policies and focus on business results.

While there are differences among travelers from each country, the findings led us to identify four key global themes.



Business travel and work-life balance:

Being on the road can take its toll on employees. Travelers value employers who support business travel and traveler flexibility, both of which can impact employee satisfaction and work-life balance as well as attraction and retention.



Travel policy compliance:

The findings show that there is a direct correlation between company policy enforcement, whether it be strict or lax, and traveler compliance. Receiving more education appears to be an underlying need for many travelers.



Preferences and pain points for booking and expense:

Travelers tend to model their behavior around booking and expenses after those who are approving them. Meanwhile, while most travelers report having company systems or apps to book travel and report expenses, they don't always say they are easy to use.



Duty of care disconnect:

Travelers believe that it is important for their employers to invest in technology to support them in times of emergency or travel disruption. But they are conflicted about location-detecting technologies that they feel might infringe on their privacy.



GLOBAL BUSINESS TRAVEL



Business Travel and Work-life Balance

Business Travel and Work-life Balance

Most business travelers agree that business travel helps create and maintain strong relationships, helps with professional development, and is a good use of their time. Also, more than three-quarters of travelers across all countries agree that business travel is enjoyable and more than 9 in 10 travelers reported that their employer is supportive of business travel.

When asked about the amount of time they spend traveling for business, respondents from each country reported favorably. Singapore showed the lowest level of satisfaction at 88%. Comparably, respondents reported similar or slightly lower levels of satisfaction with their work-life balance.

Not surprisingly, these high levels of satisfaction with time spent on the road and work-life balance jive with respondents' overwhelming happiness in their jobs. (One hundred percent of respondents from Germany report being satisfied with their jobs.)



Three-quarters of travelers across all countries agree that business travel is enjoyable

Yet, even with high levels of traveler satisfaction, there appear to be opportunities for employers to show they care for and value their business travelers, particularly in Singapore. Questions about how considerate their employers are of their well-being and personal lives yielded the following:

- › Only 14% of respondents in Singapore and 33% of respondents in the UK believe their employer always has their safety in mind when they travel for business (59% and 70% respectively say always or most of the time)
- › 21% of respondents in Australia report always being allowed to be flexible with the amount of time they travel to accommodate their personal lives with 51% saying always or most of the time
- › 26% of US travelers say their employer always shows they care about their well-being

Travelers in each country encounter different challenges. For instance:

- › For French respondents, security concerns are top of mind. They also worry about not being able to adjust their travel arrangements if something unexpectedly happens.
- › Meanwhile, the US respondents were the only ones who didn't rank the ability to change travel plans in the event of an emergency among their top three concerns.

Top 3 Challenges Identified by Business Travelers

	#1	#2	#3
Keeping my day-to-day workload and commitments on track, while planning to travel, traveling, and post trip			
Having to travel over weekends, holidays, or outside of normal business hours			
Being away from family and friends			
Not being able to adjust travel arrangements if something unexpectedly happens			
Increasingly prevalent severe weather events			
Domestic security concerns			
International security concerns			

Three issues make business travel challenging according to a majority of business travelers from each country.



Business travel can be emotional. It takes people away from spending time with family and friends. It can be stressful. And it can infringe on personal time and abilities to meet other work obligations. Travelers were asked to identify words or phrases to describe how they feel upon returning home from a business trip. There were two emotions that came to the forefront:

1. Motivation:

Travelers from India and France are more likely to return feeling motivated (50% and 42% respectively).

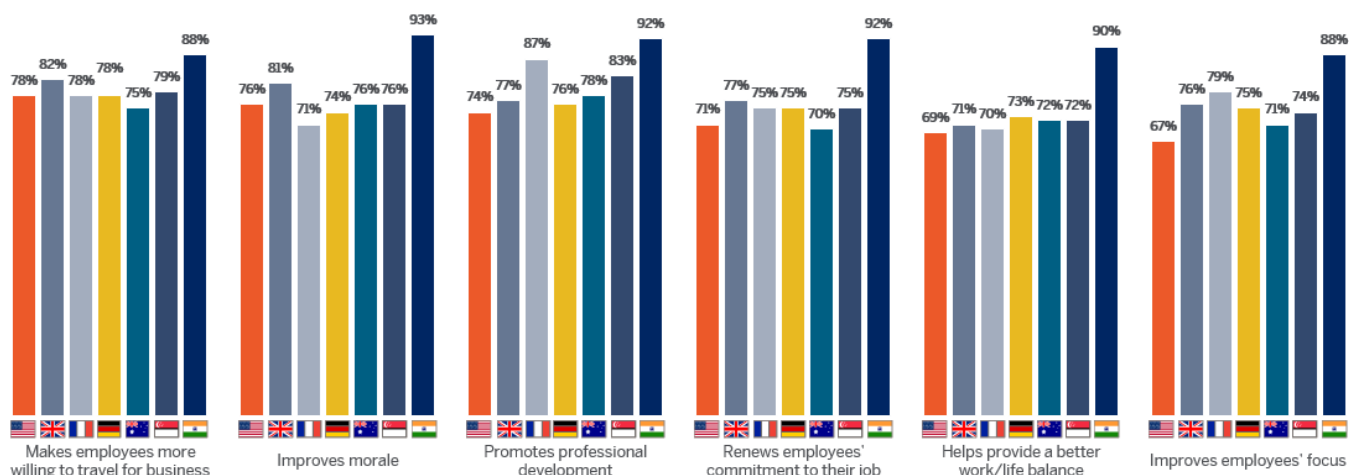
2. Relief:

Travelers from the US (67%), Germany (48%), Singapore (44%), Australia (44%), and the UK (36%) say they return feeling relieved to be home.

If employers can find ways to make business travel more enjoyable, it can lead to more willingness to travel for business, improve work-life balance, improve morale, and alleviate employee burnout.

BENEFITS OF MAKING BUSINESS TRAVEL MORE ENJOYABLE

% Agree



Q34. Below is a list of statements. For each one, please indicate if you agree or disagree. Making business travel more enjoyable...



GLOBAL BUSINESS TRAVEL

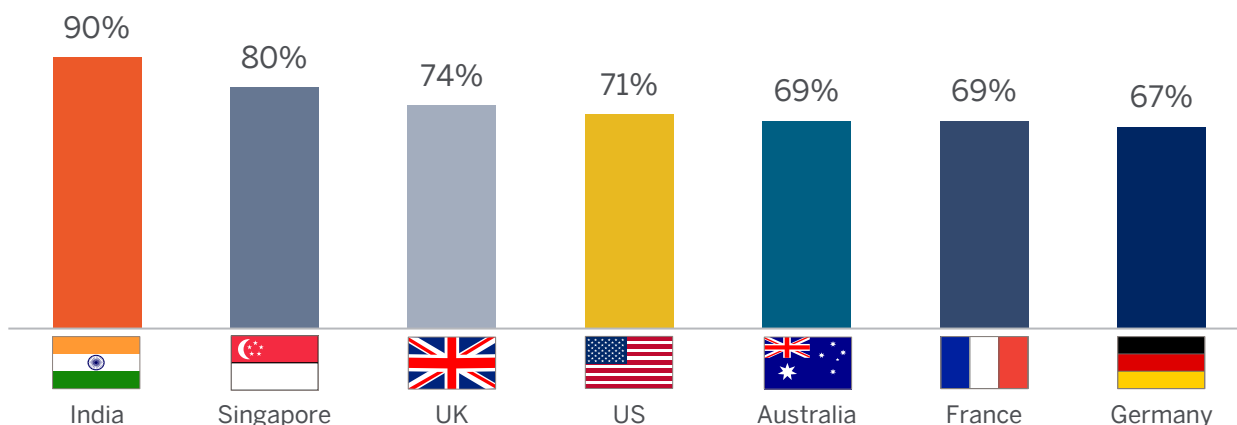
A background image showing a man and a woman in business attire (white shirts) sitting at a table, looking down at documents. The woman is in the foreground, and the man is slightly behind her. The image is overlaid with a semi-transparent white box containing the title text.

Travel Policy Compliance

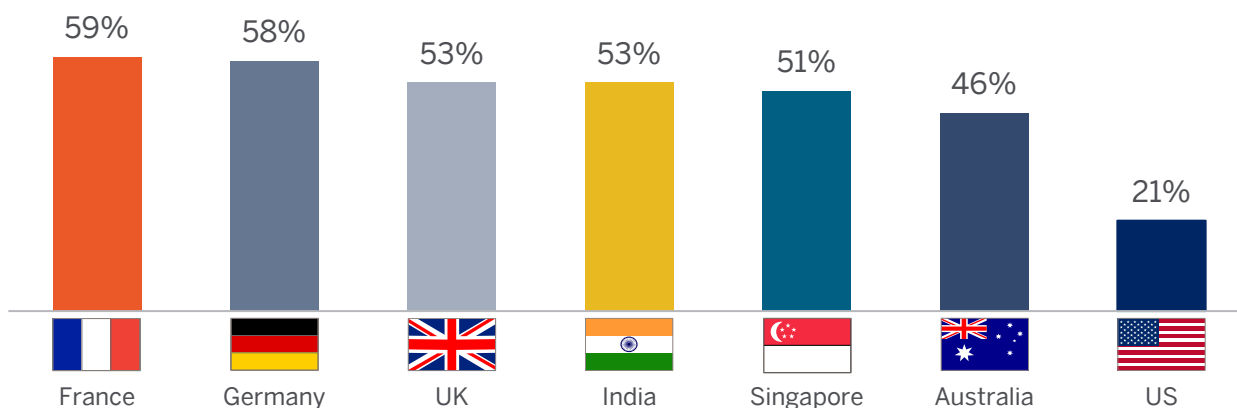
Travel Policy Compliance

Business travel policies are an important piece of a company's travel management program. They provide guidelines for employees to book travel in order to take advantage of savings opportunities, preferred supplier relationships, and duty of care services, among other things. Most travelers know if their company has a travel policy, and most say they are at least "very familiar" with it.

Company has a business travel policy:



And yet, just because travelers know they have a policy and they are familiar with it does not mean the policy is clear to them. In each country, with the exception of the US, roughly half of travelers agree with the statement **"My company does not have a clear policy when it comes to business travel and expense reporting."**



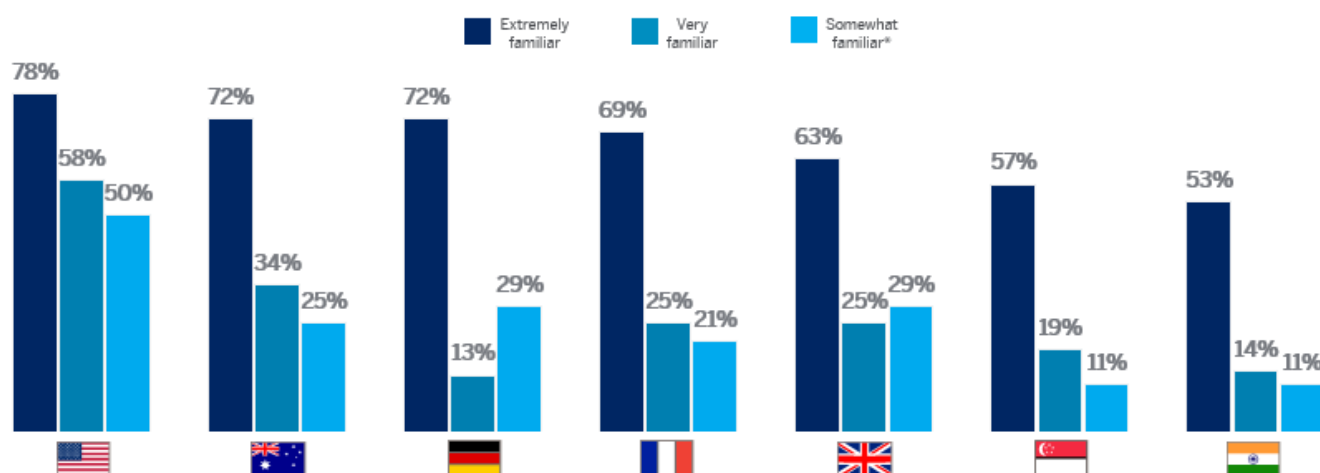
Why do US travelers seem to understand their companies' travel and expense policies better than their overseas counterparts? One potential explanation is necessity, as 3 out of 4 of US travelers also report that their companies strictly enforce said policies.

When travelers asked to classify their companies' approaches to policy enforcement, there were two camps, strict and lax. For most countries, the majority of travelers reported having a strict policy. France and India are the exceptions with 57% of those in France and 53% of those in India saying they have a lax policy.

Travelers who reported being "extremely familiar" with their company travel policy are more likely to also say they follow their policy all of the time. But the same does not hold true for those who reported having a company with a strict policy enforcement. The correlation between policy enforcement style and following policy all of the time does not differ too much between strict enforcement and relaxed enforcement. Actually, in India, more travelers who said their company had a relaxed enforcement approach are likely to follow policy all the time.

ENCOURAGING COMPLIANCE BY PROMOTING BETTER UNDERSTANDING OF POLICY

Compliance with Business Travel Policy and Guidelines by Familiarity
% Follow Policy "All of the Time"

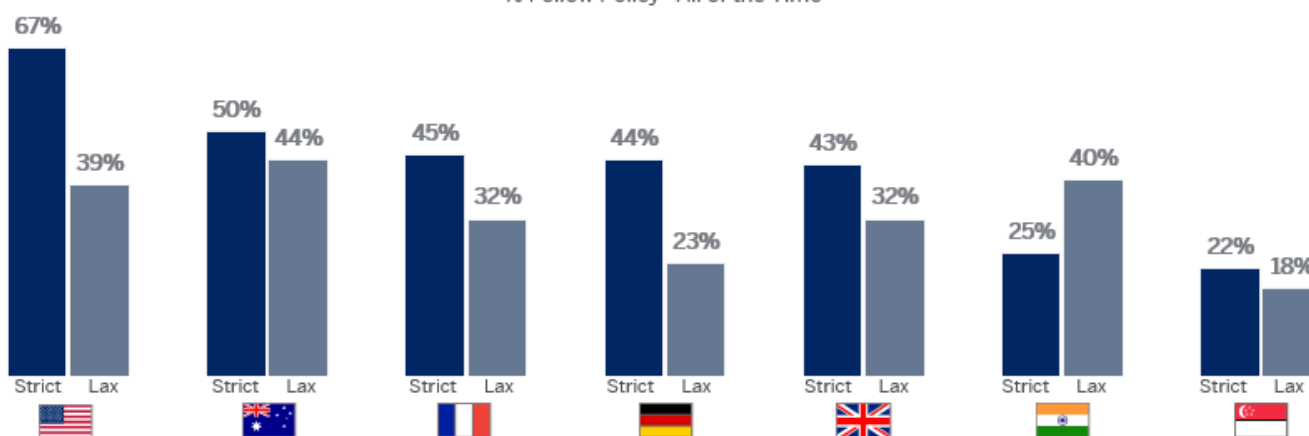


Q18. How familiar would you say you are with your company's business travel policy/guidelines? Asked of those whose company has a business travel policy/set of guidelines.

Q21. When you're traveling for business, how often do you follow each of your company's business travel policy/guidelines? Asked of those whose company has a business travel policy/set of guidelines. *Indicates small sample size.

UNDERSTANDING THE RELATIONSHIP BETWEEN COMPLIANCE AND POLICY ENFORCEMENT

Compliance with Business Travel Policy and Guidelines by Policy Enforcement Type
% Follow Policy "All of the Time"

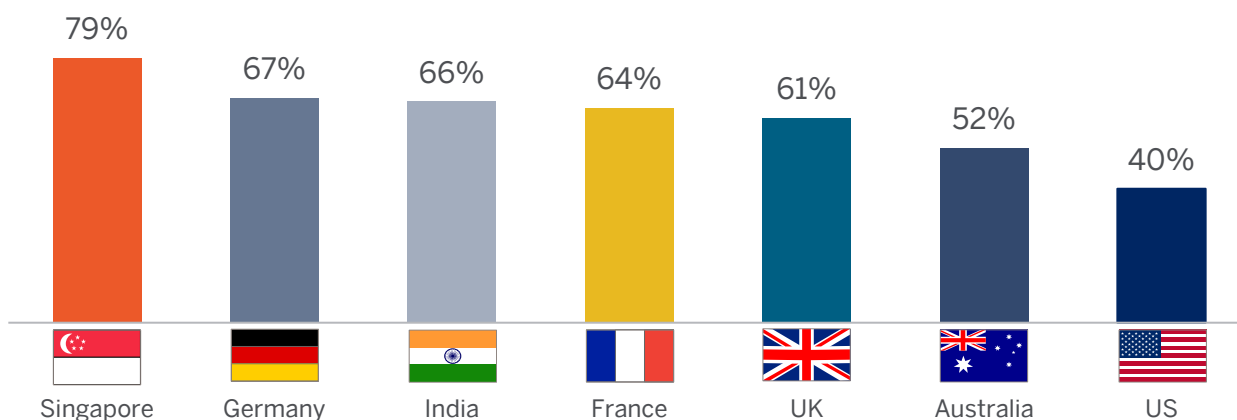


Q20. Would you say that your company's business travel policy/guidelines are strictly enforced or are they more lax? Asked of those whose company has a business travel policy/set of guidelines.

Q21. When you're traveling for business, how often do you follow each of your company's business travel policy/guidelines? Asked of those whose company has a business travel policy/set of guidelines.

Regardless of how strict or relaxed their companies are on policy compliance, most travelers report not following the rules all the time. Here again, the US is the only country that appears to be an outlier.

Travelers who admit to going rogue, by country:



There are many reasons travelers report booking travel outside of their company policy. A top reason across all countries is to be closer to their meeting or event location. The US and France also say they book out of policy to stay in a safer location. That does not come as a big surprise

in France since travelers there reported security concerns as their top travel challenge. Singapore and India say convenient location is a good reason to book out of policy, while the UK and France also say they would book out of policy to minimize any negative impact to their health and well-being.

RATIONALE FOR GOING ROGUE

% Saying Good Reason to Book Outside of Policy or System

	U.S.	UK	France	Germany	Australia	Singapore	India
To be at the same hotel as the client	84%	91%	87%	87%	91%	91%	94%
To be closer to the meeting/business event venue	86%	94%	91%	94%	94%	95%	96%
To save the company money	85%	92%	88%	92%	92%	90%	92%
To earn loyalty points or rewards	65%	84%	85%	87%	84%	85%	92%
To stay in a safer location	86%	93%	93%	93%	91%	91%	94%
To stay in a location that is more convenient	85%	91%	90%	92%	91%	95%	96%
To stay in a better quality hotel	71%	90%	90%	91%	89%	87%	96%
To stay with family or friends	76%	86%	86%	82%	87%	87%	94%
Prefer to fly with another airline not under current policy	55%	87%	89%	83%	77%	83%	88%
Prefer to stay at hotels not under current policy	52%	84%	88%	76%	77%	81%	87%
To avoid traveling economy/coach on long-haul business trips	62%	89%	88%	89%	86%	89%	92%
To have business lounge access	49%	87%	87%	82%	82%	85%	93%
To minimize any negative impact to my health and well-being	81%	94%	93%	87%	92%	90%	93%
To minimize the amount of time needed to acclimate/minimize jetlag	75%	92%	85%	89%	89%	91%	94%

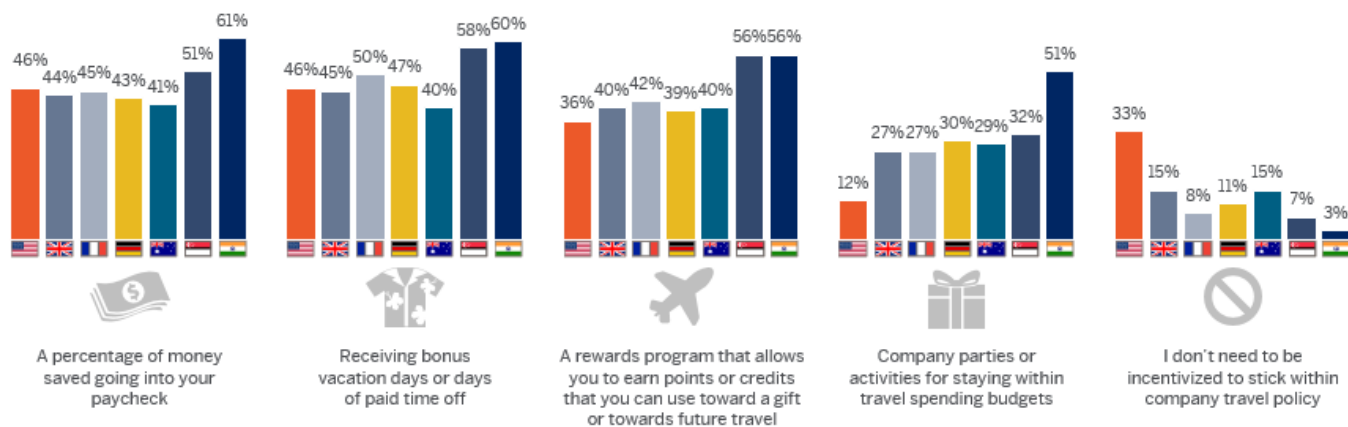
! While most rationale is persuasive, the top reason to ignore company system or policy according to business travelers in all countries, except France, is to be closer to the meeting or business event venue. A safer location is also a major priority to travelers.

Q25. Here are a number of reasons people have said are why they do not use the company-approved system or policy when booking business travel. For each one, please indicate how good of a reason you think it is to book business travel that falls outside of their company system or policy.

Since having a strict policy enforcement approach does not work for all countries or companies, offering incentives could be a way to change traveler behavior. Travelers responded favorably to things like having a percentage of the money they saved by booking within policy put into their paycheck and receiving bonus vacation days or paid time off. Travelers from Singapore and India are most impacted by incentives. On the other hand, only one-third of US travelers say they do not need to be incentivized in order to stick within company policy.

ENCOURAGING BUSINESS TRAVELERS TO BOOK WITHIN POLICY

Incentives' Impact on Increasing Business Travelers' Likelihood to Book Within Policy



Q36. Would any of the following incentives increase your likelihood of booking within company policy?

Travel policy compliance stems from a level of understanding and a carrot and stick approach. The more travelers understand their company travel policy and the benefits that are in it for them, the more they will comply.



GLOBAL BUSINESS TRAVEL

Preferences and Pain Points for Booking and Expense Reporting

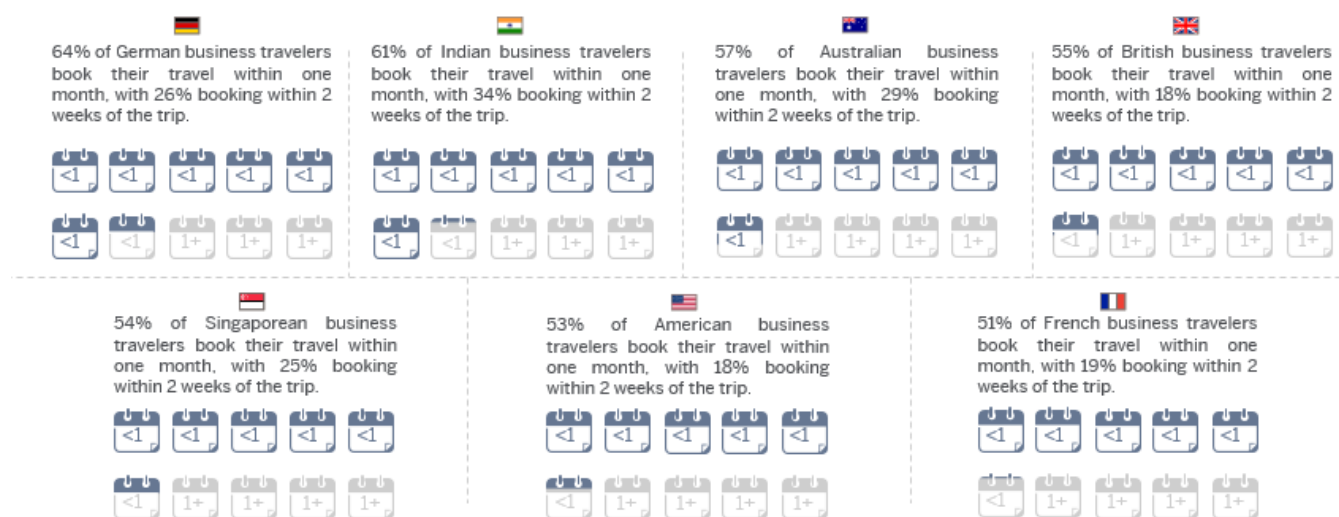
Preferences and Pain Points for Booking and Expense Reporting

Understanding traveler behavior is important in shaping how and what companies should be communicating to their travelers when it comes to booking company travel and reporting expenses. Across all countries surveyed, the majority of travelers indicated it is important that they save their company money when booking business travel.

Most travelers know about their business trips well in advance. Travelers in the US, Australia, and France often know over a month ahead of time. However, even when given ample notice about an upcoming trip, most travelers wait to book their trip within one month, with some notable percentages of travelers waiting to book within two weeks of their trip.

TIMELINE FOR BOOKING BUSINESS TRAVEL

How Far in Advance Business Travelers Book Their Travel



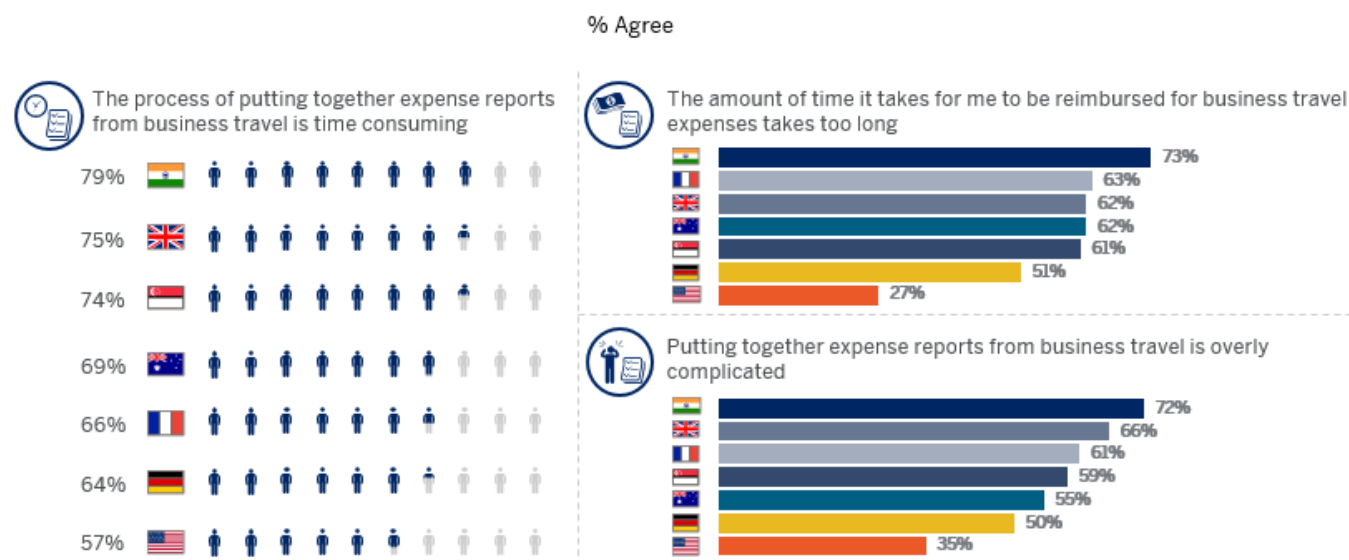
Q11. If given ample notice of an upcoming business trip, how far in advance do you book your travel?

When travelers are ready to plan their trip, most of them report booking through an online system or app that their company requires them to utilize. The US is the exception to this finding with only 46% of respondents saying their company has an online booking system or app.

Seventy-five percent of travelers in Singapore said they use a system or app, but only 45% say it is easy to use. Travelers from the remaining countries scored their booking system or app higher on ease of use. However, since about a quarter to one-third of travelers say their online systems or apps are not easy to use, there are opportunities to educate users and to improve the tools themselves.

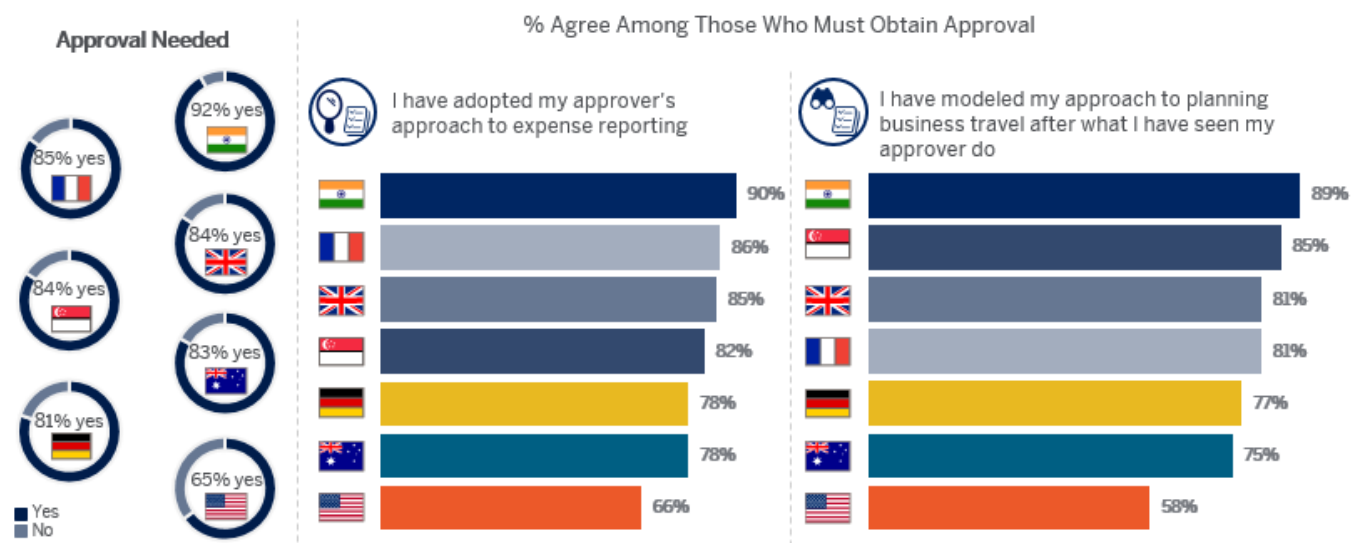
Just as there is opportunity to make the online booking process easier, there is also opportunity to improve the expense reporting process. Most travelers agree that putting together expense reports is time-consuming. Travelers outside the US are also more likely to say that the process of putting together the reports are overly complicated and the wait time for reimbursement is too long, particularly in India.

ATTITUDES TOWARDS EXPENSE REPORTING



Q12. Please indicate if you agree or disagree with each of the following statements based on your experiences traveling for business with your company.

More than 8 in 10 travelers across India, France, the UK, Singapore, Australia, and Germany say they require approval prior to booking travel and/or when submitting an expense report. This is compared to just over 6 in 10 US business travelers. Those travelers who reported needing approval also said that they have adopted their approver's approach to expense reporting and planning business travel. The percentages are slightly lower in the US but still a majority.



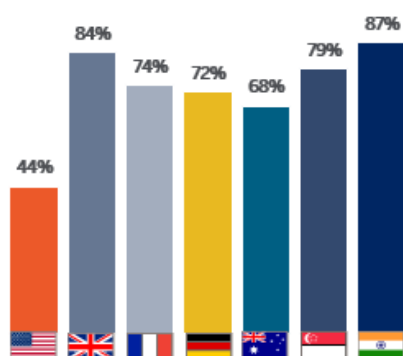
Q30. When you are traveling for business, are you required to obtain approval prior to booking your business travel and/or when submitting an expense report?

Q32. Please indicate if you agree or disagree with each of the following statements.

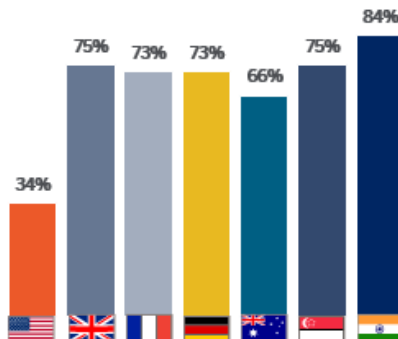
While US travelers appear to be somewhat of an anomaly in terms of expense reporting and business travel, travelers from the other six countries say that the flexibility they have, or don't have, when it comes to business travel is dependent upon who is approving it. It is also common for approvers to weigh in on travel arrangements and how to better save money. It is a potentially significant finding that business travel and expense report approvers, at least outside of the US, wield such influence on travelers. Companies would do well to consider engaging this particular group of stakeholders with more education on T&E policy and the roles they are expected to play to enforce them.

APPROVERS' INFLUENCE

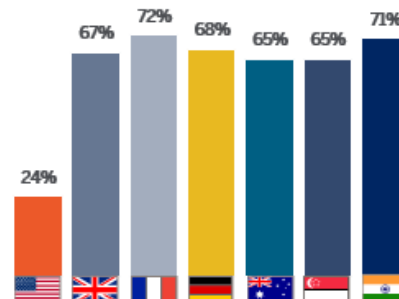
% Agree Among Those Who Must Obtain Approval



At my company, an employee's ability to blend business travel and leisure travel or activities depends on who their approver of business travel and expense reports is



At my company, how enjoyable business travel is depends on who the approver of your business travel and expense reports is



My approver is cheaper than what official company travel policy allows

Q32. Please indicate if you agree or disagree with each of the following statements.



GLOBAL BUSINESS TRAVEL

A photograph of a man with a beard and short brown hair, wearing a light blue jacket over a white shirt. He is looking down at a white smartphone in his right hand. The background is a blurred city street at night, with warm bokeh lights from buildings and streetlights. A semi-transparent white box is overlaid on the image, containing the title text.

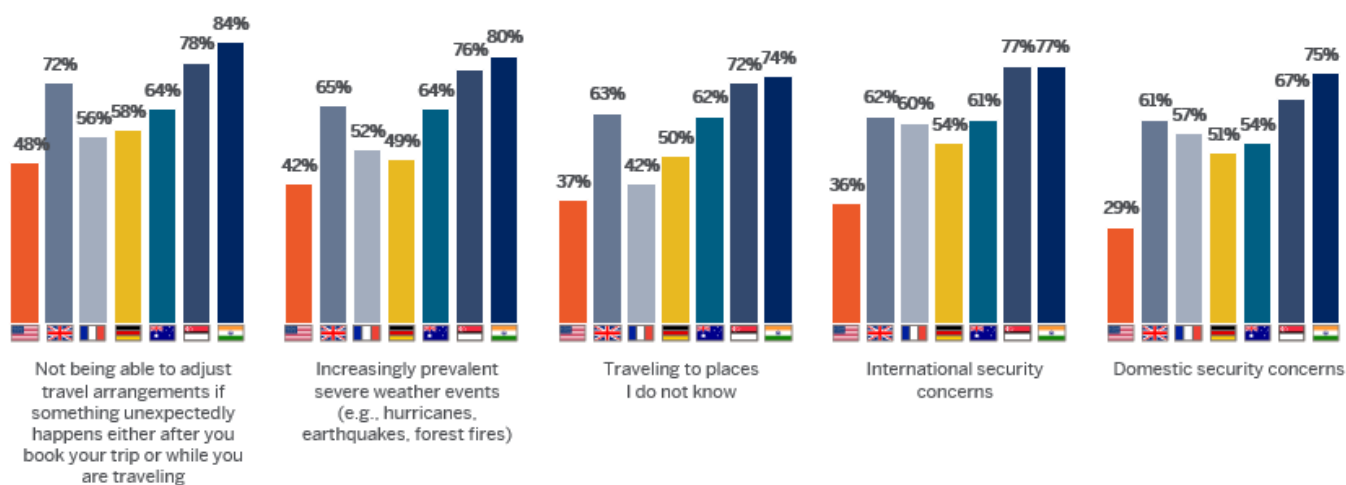
Duty of Care Disconnect

Duty of Care Disconnect

Traveler safety and security are important for both businesses and their business travelers alike. Business travelers outside the US have concerns and see more challenges when it comes to these aspects of business travel. US travelers do not see security concerns as much of a challenge, which could be due to the fact that they are mostly traveling domestically.

SECURITY CONCERNS, UNCERTAINTY, AND INFLEXIBILITY CHALLENGES

Business Travel Challenges

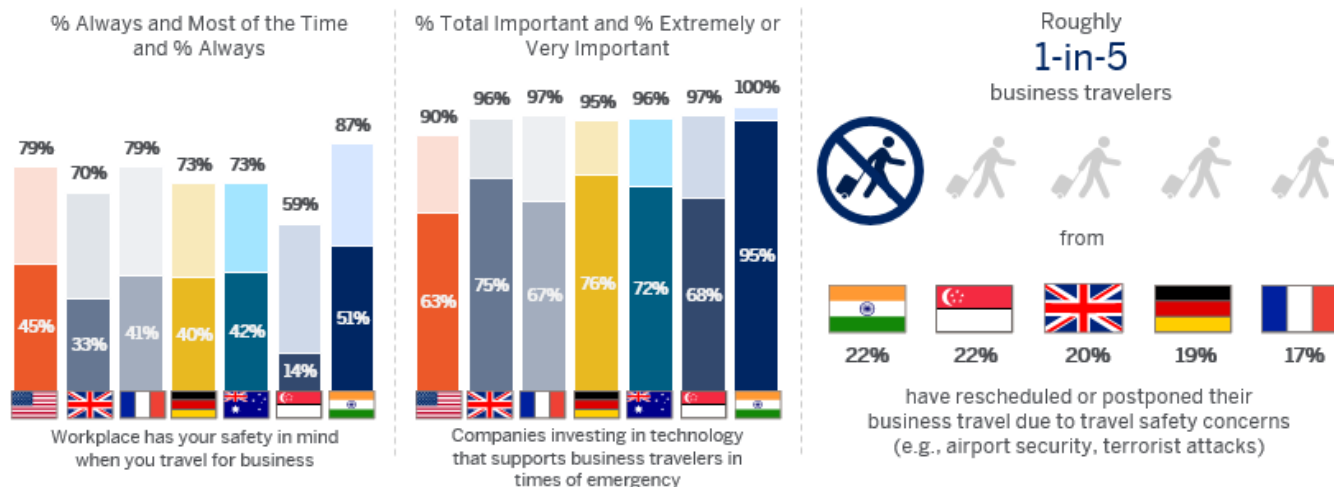


Q06. Here is a list of reasons some people have said make business travel challenging. For each, please indicate if you think it makes business travel very challenging, somewhat challenging, not too challenging, or not at all challenging.

If something were to happen unexpectedly while traveling, over 8 in 10 travelers say they know who to contact for help. Similarly, they also have confidence in their employers' ability to provide them immediate assistance in the event of a travel disruption. With the exception of Singapore, at least 7 in 10 travelers believe that their employers have their safety in mind most of the time when they travel for business. Fifty-nine percent of travelers from Singapore feel this way.

Roughly 1 in 5 travelers from India, Singapore, the UK, Germany, and France have had to reschedule or postpone their business travel due to travel safety concerns. This explains why these travelers view "not being able to adjust travel arrangements if something unexpectedly happens either after you book your trip or while traveling" as a challenge of business travel.

IMPORTANCE OF INVESTING IN TECHNOLOGY TO SUPPORT BUSINESS TRAVELERS IN TIMES OF EMERGENCY



Q02. How often, if at all, does your workplace...? Darker colors used to indicate intensity.

Q28. How important is it for companies to invest in technology that supports business travelers in times of emergency? Darker colors used to indicate intensity.

S08. In the past 12 months, please indicate if any of your business trips included any of the following. Re-scheduling/postponing due to travel safety concerns (e.g., airport security, terrorist acts).

Travelers appear to have mixed feelings regarding their employers' capabilities to monitor their travels. While almost all respondents believe it is important for companies to invest in technology that supports business travelers in times of emergency, most feel that their employer does not need any other method of locating them beyond their cell phone.

ATTITUDES TOWARD BUSINESS TRAVELER MONITORING AND ACCESSIBILITY

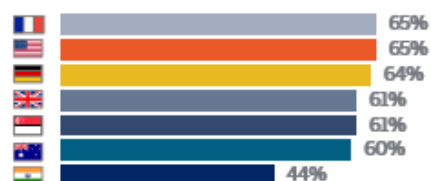
Attitudes Toward Business Traveler Location Technology – % Agree



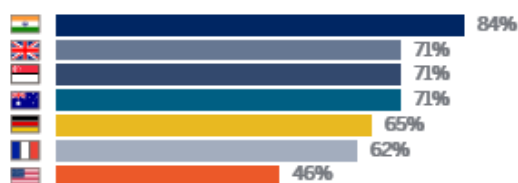
My employer can reach me by cell phone and doesn't need any other methods of locating me



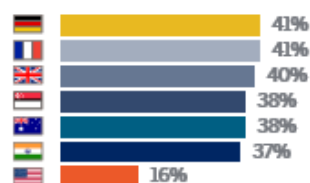
My employer does not need to know where I am at all times



My employer should know where I am and how to reach me at all times



My employer doesn't do enough to maintain communication channels



Q29. When it comes to business traveler location technology, I think...

There is a balancing act for employers to play in regards to monitoring their travelers' locations when they are on the road. They need to know where their employees are meeting, staying overnight, flying, etc., but their travelers do not want to feel like they are being watched at all times. Communicating to travelers about the importance of booking within company channels and how that can link to monitoring their safety and security is an important piece of the duty of care message.

A blurred background image of an airport terminal with people walking and bright lights.

Conclusion

Conclusion

This look at the human side of business travel serves to reinforce some of what we already know, uncovers some intriguing trends, and highlights some potentially telling differences from region to region. Overall, we see the following items as food for thought for anyone interested in creating better experiences for business travelers.

1. Travelers report being satisfied with their companies, their jobs, and the amount they travel for work, regardless of how much time they spend on the road. However, business travel is not without its challenges for employees.

Reviewing and updating company policies around travel and the flexibility associated with it can be a way to make employees feel more productive on the road and not as exhausted when they return home.

2. Having strict travel policy enforcement guidelines doesn't always result in traveler compliance. There appears to be greater compliance among travelers who are more familiar with the policy.

Educating your travelers on policy and the options and benefits that are included for them when they book through the company booking channels can help them become more knowledgeable. This also may lead to incentivizing travelers to book their next trip within policy.

3. Employee education on travel policy is critical, but could travel and expense approvers be more important pupils?

Travelers largely report taking cues on travel policy compliance from whomever approves their trips/expense reports. What can companies do to leverage this influence approvers seem to wield? One way might be to include policy refreshers in manager trainings.

4. What's the right balance between traveler safety and traveler privacy?

Travelers are largely in favor of employers using technology to support their well-being on the road, but they aren't comfortable with employers knowing their every move. Companies may have to do a balancing act to be sure travelers understand the importance of managing their travel through the company tools and providing the most up-to-date contact information so they can be contacted while on the road without feeling that "big brother" is watching them.



About this research

American Express Global Business Travel partnered with market research firm GfK to conduct this research of business travelers. GfK conducted an online survey of adult business travelers using a blend of KnowledgePanel™ and opt-in sample. The survey was conducted among business travelers living in the United States (N=750), United Kingdom (N=201), France (N=206), Germany (N=200), Australia (N=200), Singapore (N=205), and India (N=201) from November 17 – December 6, 2017. For the purposes of this study, business travelers are defined as those who have spent at least the equivalent of five days in the past 12 months traveling for business that included overnight stays.



About GfK

GfK is a trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts worldwide combine their passion with GfK's 80 years of data science experience. This allows GfK to deliver vital global insights matched with local market intelligence from more than 100 countries. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers' experiences and choices.



American Express Global Business Travel (GBT) equips companies of all sizes with the insights, tools, services and expertise they need to keep their travellers informed, focused and productive while on the road. With approximately 12,000 employees and operations in nearly 140 countries worldwide, GBT empowers customers to take control of their travel programs, optimizing the return on their travel and meetings investments, while, more importantly, providing extraordinary traveller care.

Learn more at <https://www.amexglobalbusinesstravel.com/uk/blog>

Follow us on Twitter [@amexgbt](#)

Follow us on [LinkedIn](#)

American Express Global Business Travel (GBT) is a joint venture that is not wholly owned by American Express Company or any of its subsidiaries (American Express). "American Express Global Business Travel," "American Express," and the American Express logo are trademarks of American Express and are used under limited license. © 2018 GBT Travel Services UK Limited