THE CHANGING FACE OF THE BUSINESS TRAVELER 2017-18

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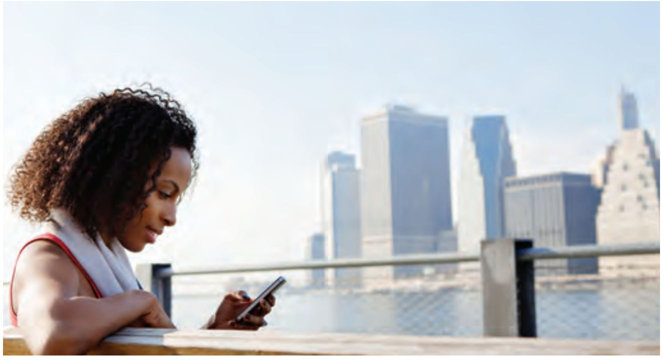

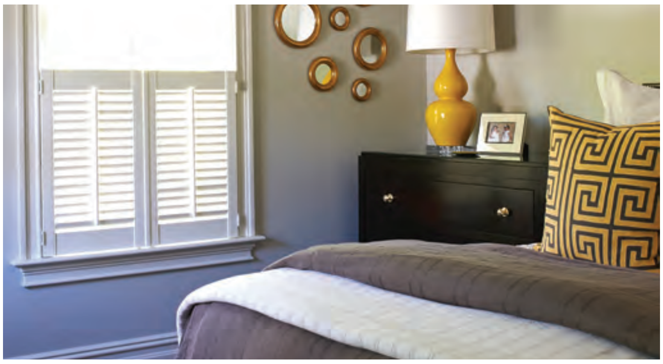

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FOREWORD

Business travel today is evolving quickly. In 2017, travelers are increasingly younger, more tech-savvy and comfortable with change. Corporations are expanding where they do business to an ever-increasing number of countries and they are changing when and how their employees travel.

While this makes for an exciting time to be part of the global mobility industry, it also makes sense to take a moment to better understand the current state of business travel and recalibrate what we do and how we do it. Who are today's travelers? Where are they headed? What's most important to them? How can we meet their needs?

As a start, we partnered with The Forum for Expatriate Management (FEM) to reach out to global mobility heads, consultants and senior executives across a wide range of industries and regions to learn some of these answers via a survey on *The Changing Face of the Business Traveler*.

The majority of those surveyed said that the number of business travelers in their organization had increased in the past year. Traditional long-term assignments (one to five years) and short-term moves (three months – one year) are still common, but the vast majority of trips are for less than one month.

So travel is up, but where are people headed? Asia leads the regions as a travel destination, followed closely by North America and Continental Europe.

Who is traveling? The oldest millennials are now in the 31-40 age group and they now make up the largest group of business travelers. As they move into managerial and more senior positions they bring with them the integration of technology into all aspects of their lives and an openness for changing the way things have always been done.

In taking a look at their needs, travelers identified having a high-speed internet/technology/media package as their top priority in selecting accommodations. They also want space, privacy and a kitchen, among other amenities. In a world where people increasingly work remotely, home can be anywhere, so travelers want their accommodation to reflect how they want to live.

Corporations are more focused on cost, but also rate security for both accommodations and their travelers as a top priority. Companies are not only advising their employees on potential risks in areas, they are increasingly expecting their global mobility partners to assist them in the event something happens in an area where their employees are staying.

So, what is a global mobility provider to do? Evolve. Our hope is that you will find this data useful in better understanding today's travelers and their needs, while also balancing the concerns and needs of their employers.

We would like to thank all those who generously gave their time to take part in this survey.

T.J. Spencer,
Vice-President Global Sales,
Oakwood Worldwide

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EXECUTIVE SUMMARY

Just under 200 unique individuals from a wide range of industries and regions across the world took part in the survey – the majority of whom are global mobility heads or managers, or hold other senior positions within their organizations.

The key findings of our survey:

• An equal percentage of 18.3% identified themselves as a global head of global mobility and a global mobility manager reporting to global or regional head. Of those who replied that their title was 'other' than those listed, the majority identified themselves as managing directors and global mobility specialists and consultants.

• The majority of respondents were from North America (41.8%) with the next largest groups headquartered in Continental Europe and the UK. When combined, the percentage of Asia and Australia/New Zealand-based companies was 13.7%. Responses from organizations based in South America were at 2.6% and the Middle East and North Africa (0.7%).

• The top five industries comprised technology, IT and telecommunications (19.3%), banking/financial services (18.7%), professional services (16.7%) energy, oil & gas (14%) and manufacturing (10.7%) along with consultancies/agency (10%), but the results showed a broad spread of sectors with other responses from those working in defense, life sciences, engineering, mining and chemicals/pharmaceuticals.

Business travel structure and reporting

• The results here echoed the recent findings of FEM's 2017 *Managing the Global Mobility Function* survey - the largest percentage of respondents have a small assignee population (39.4% with under 50 assignees). However, 19.7% here also manage over 2,000 assignees.

• The number of business travelers roughly matches the number of assignees, but there is a more even spread of those who have between 50 and 2,000 travelers.

• In-house travel departments account for the largest percentage of authorizers, but, strikingly, authorization is also made by 22.6% of the individual travelers themselves. Most other authorizations are made by a global mobility function (16.5%) and HR (15%).

• 77.6% of the respondents operate the traditional long-term assignments of between one to five years and 79% have short-term moves (three to 12 months) as well as 62.4% permanent transfers. Respondents also manage local and cross-border commuters (41.6%), contract/project assignments (30.45%) rotational assignments (15.2%) training/developmental assignments (24%), and assignee initiated assignments (17.6%).

• The clear majority of trips are for less than one month (71.8%), with 10.5% for less than two months, and with small percentages (6.5%) that are less than three months and (4.8%) that are less than six months.

Profiling business travelers

• The largest group currently being managed (32.3%) is the 31-40-year-old age group – generally identified as

Millennials, with the next largest being Generation X employees (41-50-year-olds) and then (21.8%) a younger cohort sometimes called Gen Z (26-30-year-olds) and an older group (16%) of Baby Boomers (51-60 years old).

• 53% of the respondents said that the number of business travelers in their organization had increased in the past year and 38.9% reported the number had remained the same. By contrast only 8% said that the number had decreased.

• Although 26.3% report that the number of business travelers has increased by between 5-10%, 24.6% have seen an increase of 10-20% and 22.8% report a 20-30% increase and 8.8% have witnessed an increase of 30-40% and another 7% between 40-50%.

• The most striking increase in future destinations is for Asia at 63.4%. North America (54.5%), followed by Continental Europe (53.6%) UK (39.3%), Australia/New Zealand (24.1%) and Middle East and Africa (24.1%).

Costs and benefits

• If, when looking at unexpected costs that can be added to business travelers' bills we add the results of the 'sometimes' and 'often' responses together we can see: Service charges account for the highest percentage of unexpected costs (48.5%), followed by internet access fees (46.9%) breakfast and other meals delivered to the room (46.3%) along with parking at the same percentage (43.3%) and then laundry services (35.4%), meeting room facilities (27.6%) and office services (24.4%).

• Amenities for exercise was selected by the highest percentage of respondents in a list of possible improvements for travelers (54.1%), with space for meetings/work (43.9%), separate living space within the accommodation (36.7%), cooking facilities (30.6%), personalised service such as local recommendations for eating/entertaining (28.6%) and privacy (25.5%).

• A clear majority give, or at least offer specific advice to travelers in challenging or high risk locations

(76.4%), but almost a quarter (23.6%) say that they do not.

• Information about the local area was selected by the highest percentage of respondents (76.9%) in a list of possible available information. Personal security advice specific to the location was a close second (75.6%). Emergency preparedness and mass notification (71.8%) was another significant percentage along with clear property security and safety standards (60.3%).

Booking preferences and a scale of priorities

• Almost half of respondents (49.5%) preferred to book accommodation online and another 31.1% opted for an end-to-end online solution. Just 7.8% chose an offline system with a dedicated account representative, and even fewer (4.9%) wished to use an end-to-end offline solution.

• Consolidated reporting and analytics compatible with online reservations is shown to be a priority (72.3%). Also selected were consolidated billing (48.5%), mobile access to housing solution services (37.6%) and automated responses (25.7%).

• When asked what was important to their organization on a scale of 1-5, with 1 being not at all important and 5 being very important, the price of business travel accommodation was clearly the most important factor (69.1%), the physical security of the accommodation (64.8%), a location close to the job assignment (58.7%), online booking facilities (58.7%). Quality of service (51.1%), quality of accommodation (47.3%), clear information on disaster/emergency preparedness (44.6%). Experience with the government market (12.1%) and the provider having a GSA schedule (10.5%).

• When asked what was important to their business travelers on a scale of 1-5, with 1 being not at all important and 5 being very important, the answers showed that a high-speed internet/technology/media package was judged to be the most important amenity (67.7%). Physical security of the accommodation (67%), quality of accommodation (57.6%), location close to job assignment (55.4%), quality of service (51.6%), a location close to shops/restaurants (31.9%), separate rooms within the accommodation (28.1%), onsite exercise facilities (14.4%).

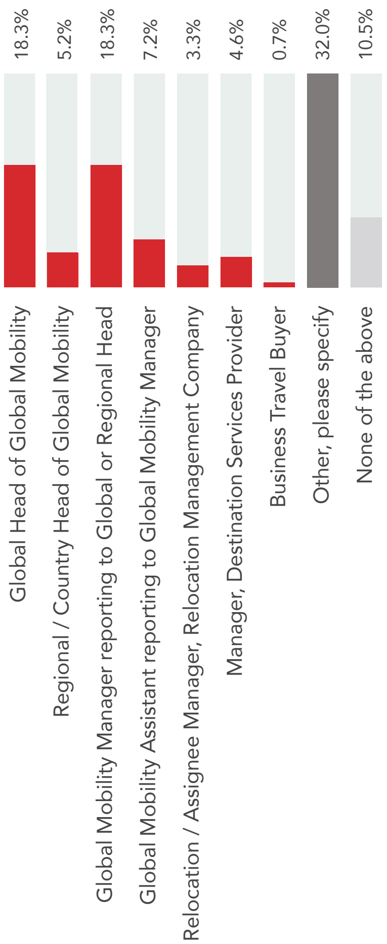
• Only 9.2% said that they plan to change their providers, 11.2% plan to increase bookings in serviced accommodation from hotels and 8.2% to increase bookings in hotels from serviced accommodation. 75.5% opted for 'none of the above' – reflecting little appetite for change.

PARTICIPANT DEMOGRAPHICS

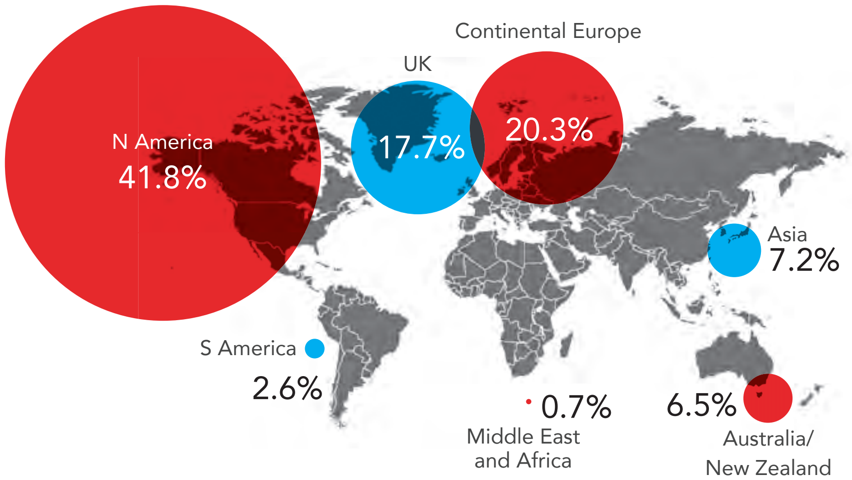
This section sets out the demographics of the survey population, including the participants' job title, headquarter location and industry sector.

Which of the following most accurately corresponds to your role?

An equal percentage of 18.3% identified themselves as Global Head of Global Mobility and a Global Mobility Manager reporting to Global or Regional Head. Regional or country Heads of Global Mobility accounted for 5.2%. Of those who replied that their title was 'other' than those listed, the majority identified themselves as Managing Directors and Global Mobility Specialists and Consultants – the number of Specialists and Consultants perhaps a reflection of the shift towards self-employment and contracting across the employment landscape as a whole.

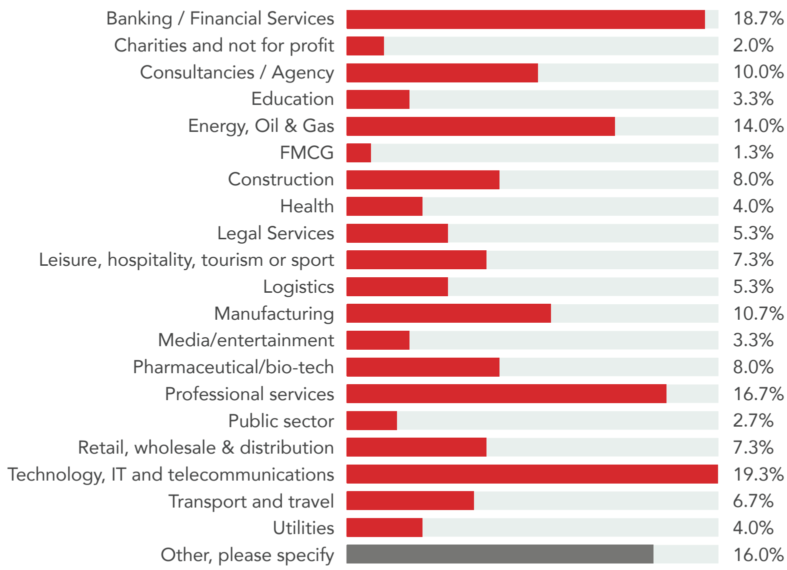


Where is your company headquartered?



In which sector(s) does your organization operate?

While the top five industries comprise technology, IT and telecommunications (19.3%), banking/financial services (18.7%), professional services (16.7%), energy, oil & gas (14%), and manufacturing (10.7%) along with consultancies/agency (10%), the results show an incredibly broad spread of sectors. Of those who specified other sectors the majority of the answers came from those working in defense, life sciences, engineering, mining and chemicals/pharmaceuticals.

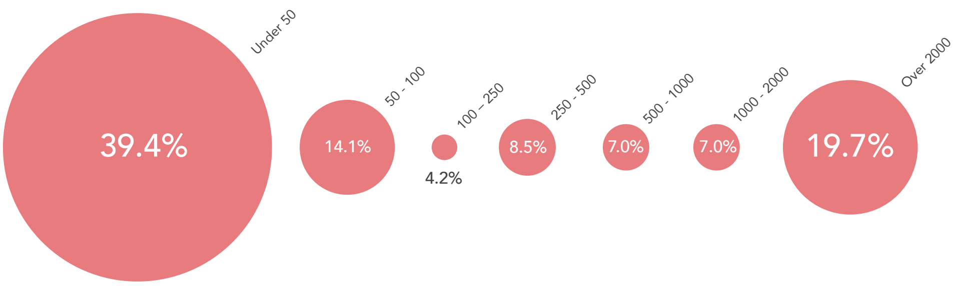


BUSINESS TRAVEL STRUCTURE AND REPORTING

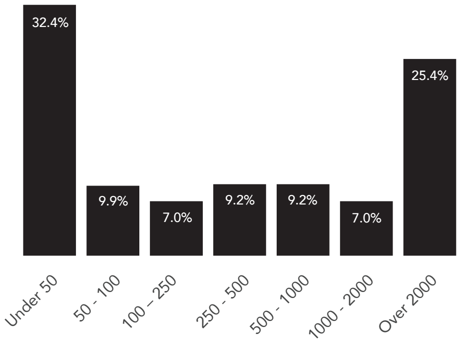
This section looks at the number and types of business travelers in the context of an organization's mobility population. We also looked at which department or individual authorizes travel.

How many assignees does your organization manage worldwide?

(Including all assignees or short-term business visitors for whom relocation services are provided)



How many business travelers does your organization manage per year?



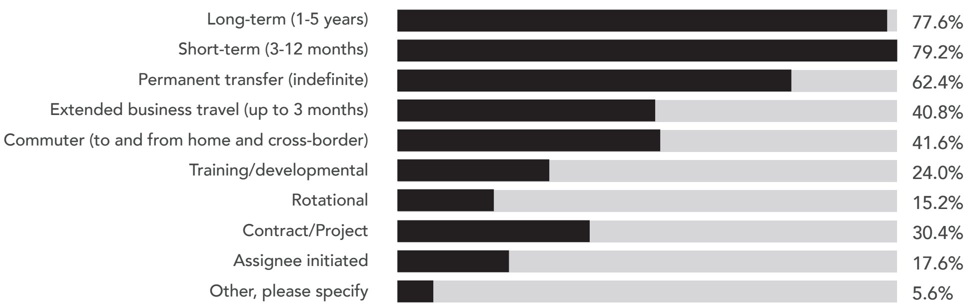
FEM has recently conducted its annual *Managing the Global Mobility Function* survey, where the results echoed the findings here that the largest percentage of respondents have a small assignee population (39.4% with under 50 assignees). However, 19.7% here also manage over 2,000 assignees – but given the types of sectors represented in the responses to the previous question, such as banking, professional services and energy, which have offices across the globe, it is not surprising that so many respondents would have a large assignee population. The answers to the question about business travelers roughly matches the number of assignees, but there is a more even spread of those who have between 50 and 2,000 travelers – confirmation that business travel remains a core activity of most organizations.

Which department(s) in your organization authorizes business trips?

Although in-house travel departments account for the largest percentage of authorizers, the most striking result here is that authorization is made by 22.6% of the individual travelers themselves. However, after that, most authorizations are made by a global mobility function (16.5%) and HR (15%). Of those who answered 'other', the majority of responses cited the employee's line managers, though their exact titles varied.

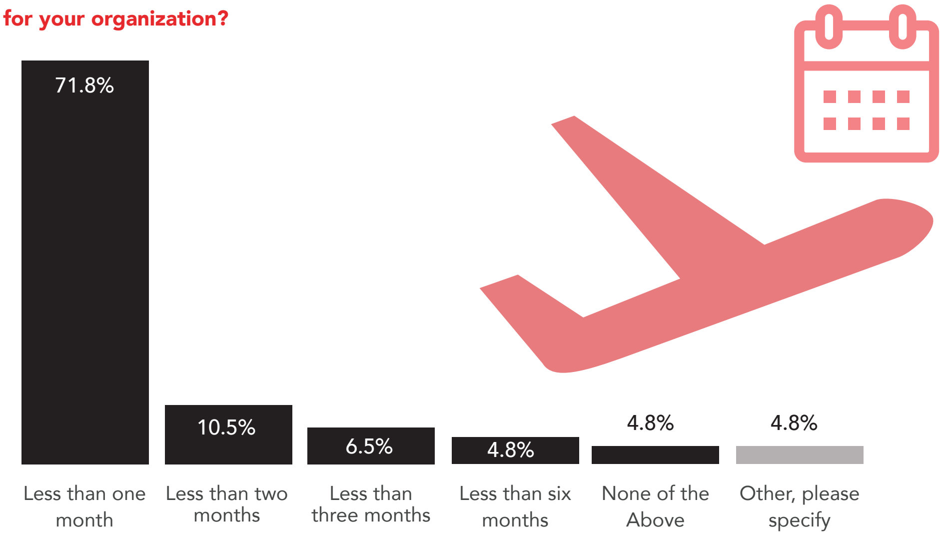
What kind of formal assignment policies do you currently operate?

77.6% of the respondents operate the traditional long-term assignments of between one to five years and 79% have short-term moves (three to 12 months as well as 62.4% permanent transfers. Our respondents also manage local and cross-border commuters (41.6%), contract/project assignments (30.45%) rotational assignments (15.2%) and a surprisingly high percentage of training/developmental assignments (24%), and assignee-initiated assignments (17.6%).



What is the average length of a business trip for your organization?

The clear majority of trips managed by our respondents are for less than one month (71.8%), with 10.5% for less than two months, and with small percentages (6.5%) that are less than three months and (4.8%) that are less than six months.



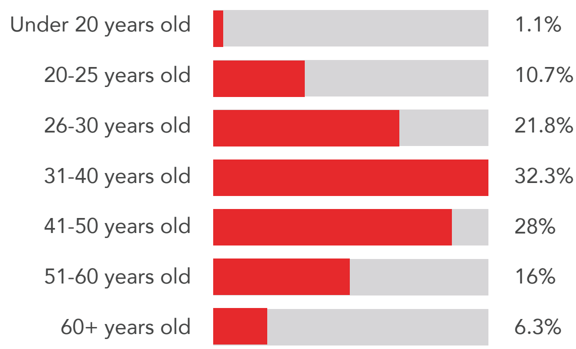
PROFILING BUSINESS TRAVELERS

In this section we examined the ages of business travelers, and asked whether the numbers of travelers has increased over the past 12 months, and to which regions participants anticipated sending more business travelers in the coming year.

What is the breakdown of your business traveler population by age?

The significant finding is that the largest group here (32.3%) is the 31-40-year-old age group – generally identified as so-called Millennials, with the next largest being Generation X employees (41-50-year-olds) and then, (21.8%) a younger cohort sometimes called Gen Z (26-30-year-olds) and an older group (16%) of Baby Boomers (51-60 years old). The figures seem to confirm that the Millennials are now coming of age within their organizations, moving into managerial or more senior positions and becoming more globally mobile.

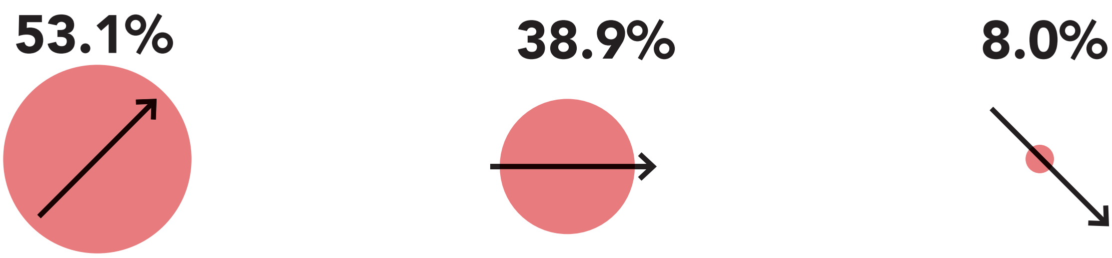
While such terms as Millennials or Gen X and Z have become common currency in the business world, we should keep in mind that any such labelling is an unscientific and imprecise pursuit. However, if we do accept some of the commonly held characteristics of Millennials in particular, (such as those listed by Pew Research Center in the USA)[1] which may include an interest in and ease with technology, and that they are more ethnically diverse, self-expressive, confident and open to change, then it becomes obvious that global mobility professionals and business travel providers need to adjust their policies and offerings to accommodate the needs of such a group.



[1] Pew Research Center, *Millennials – A Portrait of Generation Next* – February 2010. www.pewsocialtrends.org/2010/02/24/millennials-confident-connected-open-to-change/

How has the number of business travelers in your organization changed over the last 12 months?

53% of the respondents said that the number of number of business travelers had increased in the past year and 38.9% reported the number had remained the same. By contrast only 8% said that the number had decreased. These results echo those in FEM's *Policy in Practice Report 2017*, where we found 67.4% of respondents reported that the number of business travelers in their organization had increased over the past 12 months.



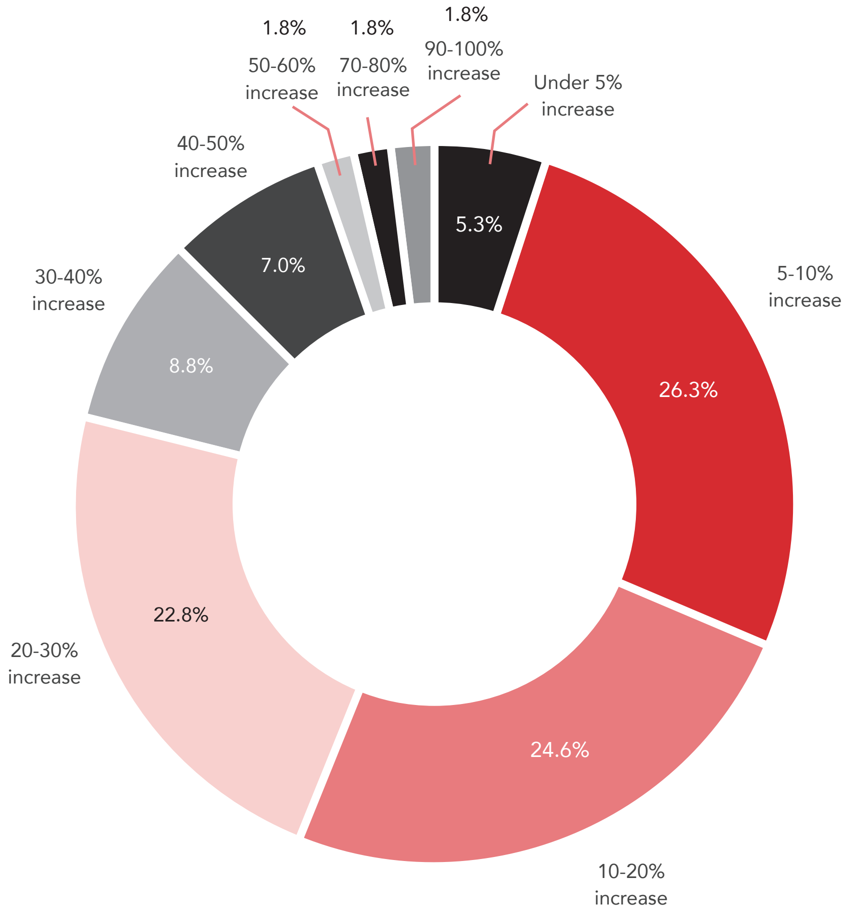
The number of business travelers has increased

The number of business travelers has remained the same

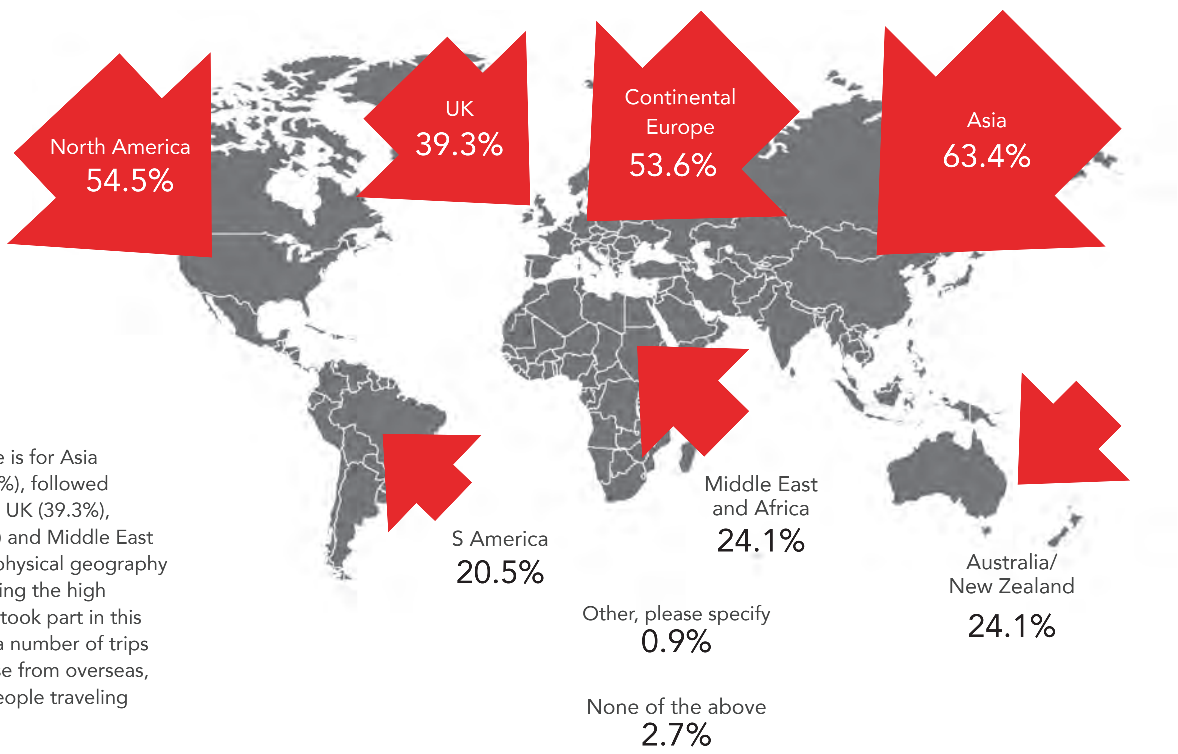
The number of business travelers has decreased

By what (approximate) percentage has the number increased?

Although 26.3% report the number of business travelers has increased by between 5-10%, 24.6% have seen an increase of 10-20% and 22.8% report a 20-30% increase and 8.8% have witnessed an increase of 30-40% and another 7% between 40-50%.



To which region(s) do you anticipate sending more of your business travelers in the next 12 months? (respondents selected all that apply)



The most striking increase here is for Asia at 63.4%. North America (54.5%), followed by Continental Europe (53.6%) UK (39.3%), Australia/New Zealand (24.1%) and Middle East and Africa (24.1%). Given the physical geography of the USA and when considering the high percentage of Americans who took part in this survey (41.8%), it is likely that a number of trips here are made not just be those from overseas, but from American business people traveling throughout their own country.

COSTS AND BENEFITS

In this section we asked about the unexpected costs entailed in business travel, what kind of amenities, facilities or services might improve business travelers' experience and whether organizations offered specific advice to employees traveling to challenging or difficult locations.

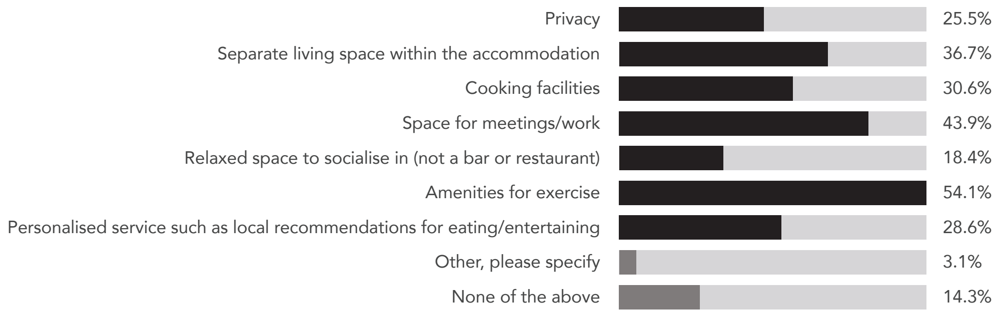
How regularly do the following add unexpected costs to your business travelers' bills?

Looking at the responses to 'often' we can see that parking, service charges and breakfast or other meals delivered to rooms are the items that most frequently add extra costs at around 15.5% – with internet access fees also being a significant figure at 10.4%. The percentage of respondents who find that charges 'sometimes' add unexpected costs include: Internet access fees (36.5%), service charges (33%), breakfast and other meals (30.5%) parking (27.8%), laundry services (27.1%), meeting room facilities (23.5%) and office services (22.3%). If we add the results from these two columns together the picture is clearer: Service charges account for the highest percentage of unexpected costs (48.5%), followed by internet access fees (46.9%) breakfast and other meals delivered to the room (46.3%) along with parking at the same percentage (43.3%) and then laundry services (35.4%), meeting room facilities (27.6%) and office services (24.4%).

	Not applicable	Never	Seldom	Sometimes	Often
Resort taxes	38.9%	13.7%	29.5%	13.7%	4.2%
Internet access fees	20.8%	12.5%	19.8%	36.5%	10.4%
Parking	19.6%	9.3%	27.8%	27.8%	15.5%
Service charges	18.6%	8.2%	24.7%	33.0%	15.5%
Meeting room facilities	23.5%	11.2%	37.8%	23.5%	4.1%
Laundry services	17.7%	15.6%	31.3%	27.1%	8.3%
Breakfast and other meals/ snacks delivered to room	16.8%	7.4%	29.5%	30.5%	15.8%
Office services	21.3%	16.0%	38.3%	22.3%	2.1%

Would any or all of the following improve your business travelers' experience?
(respondents selected all that apply)

Amenities for exercise was the top answer (54.1%), with space for meetings/work the second highest percentage selected (43.9%). Respondents also selected separate living space within the accommodation (36.7%), cooking facilities (30.6%), personalised service such as local recommendations for eating/entertaining and then privacy (25.5%). It is interesting to compare these answers with those in the question where the importance of a range of options to the business traveler are ranked 1 to 5 (p.13).



Would any of the following be useful?
(respondents selected all that apply)

Following on from the previous question, this one probed a little deeper and the results seem to confirm the impression that safety and security is currently one of the most important concerns for organizations sending their employees on a business trip – either within the home nation or overseas. While information about the local area was the top answer (76.9%), personal security advice specific to the location was a close second (75.6%). Emergency preparedness and mass notification (71.8%) was another significant percentage along with clear property security and safety standards (60.3%).

BOOKING PREFERENCES AND A SCALE OF PRIORITIES

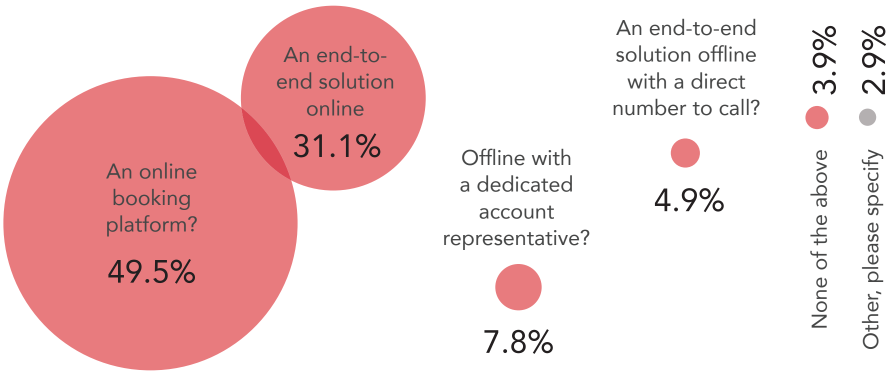
In this section we asked about preferred booking methods and our respondents also rated a range of facilities and services on a scale of 1 to 5, with 1 being not at all important and 5 being very important, both from the perspective of their organization and their business traveler population.

Do you offer specific advice to business travelers in challenging and/or high-risk locations?

A clear majority give, or at least offer, specific advice to travelers in challenging or high-risk locations (76.4%), but almost a quarter (23.6%) say they do not. In the context of so much economic and political upheaval and the heightened security measures in place at airports and city centres around the world, this seems surprising. However, when FEM's *Policy in Practice Report – Managing Risk and Compliance in an Uncertain World*, was published in February 2017, we asked a similar question and found that an astonishing 67.9% of respondents reported their organizations did not offer personal security training. Of course, there is a difference between advice and training, but, even so, given the response to the FEM report both online and from delegates at the Houston Global Mobility Conference and Americas Summit where the report's findings were presented, and the other incidents around the world since then, it is possible there has been a shift in attitude and that the 77.4% here is a reflection of that.

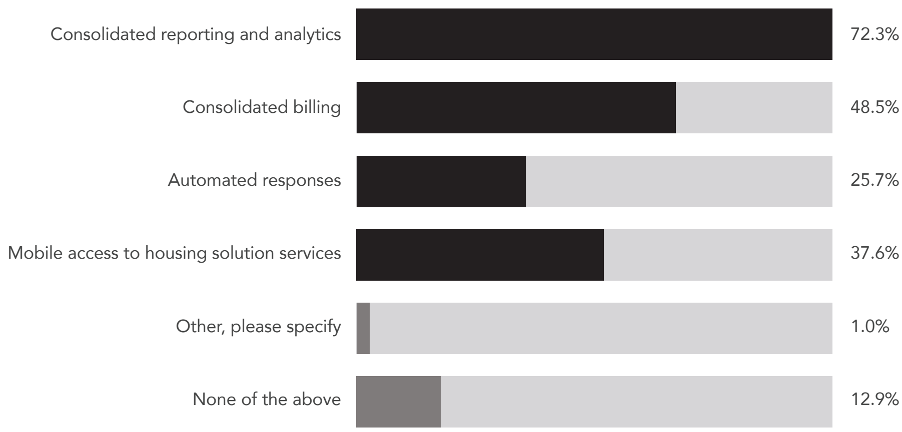
Would you prefer to book via...

Technology was the clear winner here, with almost half of respondents (49.5%) preferring to book accommodation online and another 31.1% opting for an end-to-end online solution. With just 7.8% of those who responded choosing an offline system with a dedicated account representative, and even fewer (4.9%) wishing to use an end-to-end offline solution with a direct number to call, it appears most of those who book travel want to have the facilities to research, make comparisons and book accommodation without the involvement of another party.

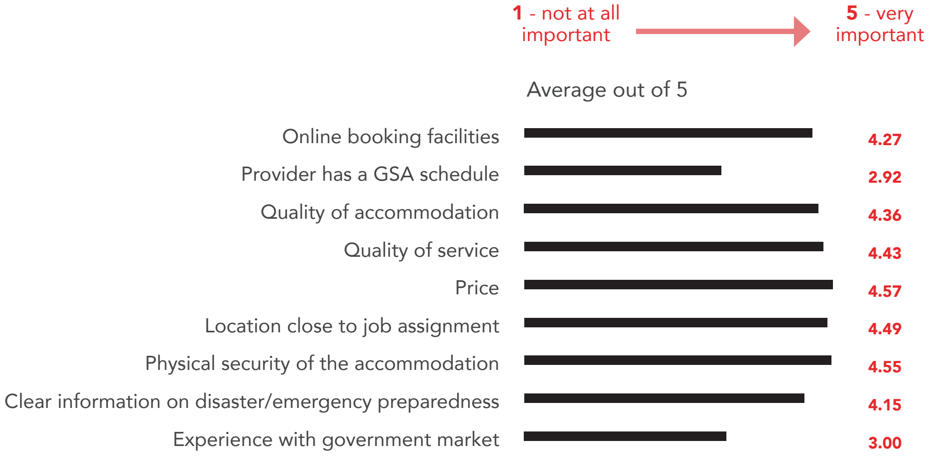


Would any of the following be useful?
(respondents selected all that apply)

Another likely reason for this distinct preference for online booking is revealed in this set of answers, where the consolidated reporting and analytics compatible with online reservations is shown to be a priority (72.3%). When this is looked at together with the percentage that also selected consolidated billing (48.5%), mobile access to housing solution services (37.6%) and automated responses (25.7%) it becomes clear why the online solution is selected over above anything else.



On a scale of 1-5, with 1 being not at all important and 5 being very important, please rate the importance to your organization of each of the following, when booking extended lodging or business travel accommodation

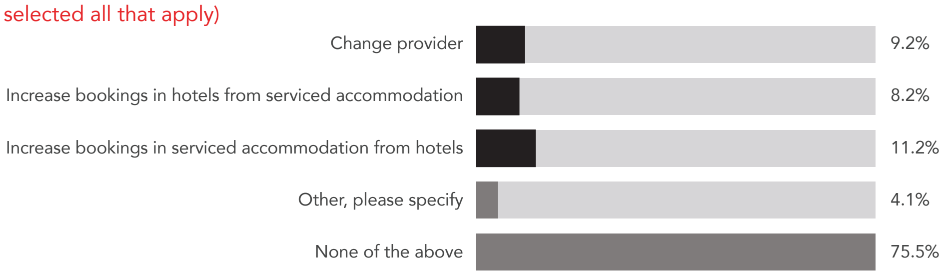


Price is the number one consideration here (69.1%), with the physical security of the accommodation being the second (64.8%), and a location close to the job assignment and online booking facilities in joint third place among the percentages (58.7%). Quality of service is judged to be slightly more important (51.1%) than the quality of accommodation (47.3%) and clear information on disaster/emergency preparedness not far behind (44.6%). Experience with the government market (12.1%) and the provider having a GSA schedule (10.5%) was far less important. The emphasis on price perhaps being a reflection of the financial squeeze that so many businesses are experiencing, but also possibly, a sign that the business travel accommodation market has reached a certain level of maturity, with accommodation being of such a standard that other considerations (such as price and specific location) are coming to the fore in the decision-making process.

Please rate the importance to your business travelers of each of the following, in an extended stay lodging or business travel accommodation

In contrast to the answers on p.11 amenities such as an onsite exercise facility received a low ranking (14.4%) here, while high-speed internet/technology/media package was judged to be the most important amenity (67.7%). And echoing the concerns flagged up on p.11 the physical security of the accommodation (67%) is the second most important consideration. The quality of accommodation (57.6%), location close to job assignment (55.4%) and quality of service (51.6%) came next, then a location close to shops/restaurants (31.9%) and separate rooms within the accommodation (28.1%).

Are you considering altering your business travel accommodation choices in any of the following ways in the next 12 months? (respondents selected all that apply)



There appears to be remarkably little appetite for change here. Only 9.2% said they plan to change their providers, 11.2% said they plan to increase bookings in serviced accommodation from hotels and 8.2% to increase bookings in hotels from serviced accommodation. Otherwise, the striking percentage here is that 75.5% opted for 'none of the above'.

CONCLUSION

Of the near 200 individuals who took part in this survey, the majority of the respondents had ‘global mobility’ in their title and were either heads, regional/country heads or senior managers. Most were from North America and then the next largest groups were headquartered in Continental Europe and the UK - all the traditional centers of business.

However, one of the striking findings of this report was the anticipated increase in the number of travelers who will go to Asia in the next 12 months (63.4%) along with a more even spread across other regions such as Continental Europe (53.6%) UK (39.3%), Australia/ New Zealand (24.1%) and Middle East and Africa (24.1%).

In terms of the age of the business traveler population, it is clear that the so-called Millennials (those born around 1980-1995) have come of age in business. They are now the largest generation in the USA – where the majority of the respondents to this survey (41.8%) are based – and have reached a level of seniority that justifies increased travel. The number of travelers in the organizations that took part in this survey has risen too, and, of those, almost a quarter (24.6%) have seen an increase of between 10-20%.

When we asked questions about the kinds of items that add unexpected costs to business travel, it became clear that although certain costs, such as service charges (48.5%) are hard to avoid, other items such as internet access fees (46.9%) meals delivered to the room (46.3%) parking (43.3%), laundry services (35.4%), meeting room facilities (27.6%) and office services (24.4%) are simply the kinds of ‘essentials’ that professionals need to do their job whilst traveling.

Another set of responses that point to a change in priorities are those connected to our questions about offering specific advice to travelers in challenging or high risk locations. 76.4% have said that they do offer advice, although in the context of so much economic and political upheaval and the heightened security measures in place at airports and city centres around the world, the fact that almost a quarter (23.6%) still do not, seems surprising.

However, when FEM’s Policy in Practice Report – *Managing Risk and Compliance in an Uncertain World* – was published in February and we asked a similar question, we were astonished to find 67.9% reported their organizations did not offer personal security training. Whilst we acknowledge that there is a difference between advice and training, given the huge response to the FEM report both online and from delegates at the Houston Global Mobility Conference and Americas Summit where the PIP report’s findings were presented, it is possible there has been a shift in attitude and that the 76.4% here is a reflection of that.

The fact that (75.6%) of those who answered this survey also thought that personal security advice specific to the location was important along with emergency preparedness and mass notification (71.8%) and clear property security and safety standards (60.3%) reinforces this impression. Online reservation systems that are compatible with consolidated reporting and analytics (72.3%) and billing (48.5%), are also a priority for those who answered the survey and it seems that organizations are increasingly keen to use more complex technology.

The price of business accommodation was the number one consideration (69.1%) among a list of options that included physical security, location, online booking facilities and quality of service and accommodation. At first glance that might appear to be a reflection of the reduced budgets that so many organizations are now operating within (and that is probably true) but it may also be a sign that business travel accommodation is now of such a standard that other considerations (such as price and specific location) are coming to the fore in the decision-making process. A positive level of satisfaction would also seem to be confirmed by the apparently small appetite that respondents show (9.2%) for changing suppliers.

Business travel is an immensely complex activity to manage and because we have addressed issues such as risk management and immigration and tax compliance in other FEM reports, we have not included it here. This report aims to present a snapshot of a part of business travel management we hope you will find both interesting and useful.

FEM is grateful to all those who participated in the survey and of course to the report’s sponsor, Oakwood Worldwide.

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