

ABOUT THE SAP CONCUR WHITE PAPER

SAP Concur White Paper Addendum for Italy

The market-specific data in this addendum is part of the SAP Concur survey of 4,850 business travelers—defined as those who travel for business 3+ times annually. The survey includes travelers from 23 global markets: US, Canada, Brazil, Mexico, UK, France, Germany, ANZ region (Australia and New Zealand), SEA region (Singapore and Malaysia), Greater China, Hong Kong, Taiwan, Japan, India, Korea, Italy, Spain, Dubai, Benelux (Belgium, Netherlands, and Luxembourg), Sweden, Denmark, Norway, and Finland.

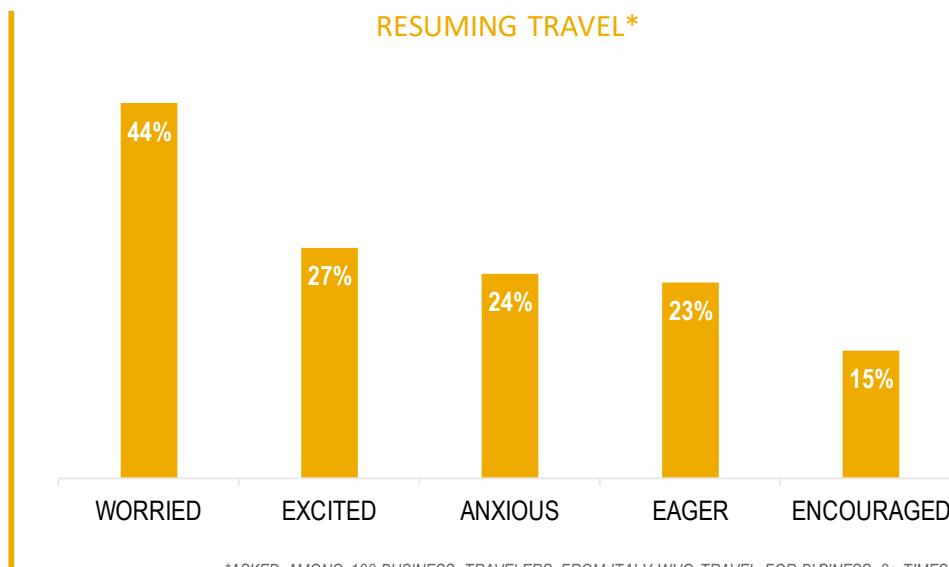
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Many Italian business travelers are looking forward to getting back to business.

Over 2 in 5 Italian business travelers (44%) feel worried about resuming travel once restrictions are lifted, but over a quarter (27%) feel excited as well. Italian business travelers at companies with mandated travel policies (41%*) are more excited than those from companies with no written policies (13%*). Over half (53%) have positive feelings about traveling again.

TOP EMOTIONS ITALIAN BUSINESS TRAVELERS HAVE IN RESPONSE TO RESUMING TRAVEL*



*ASKED AMONG 100 BUSINESS TRAVELERS FROM ITALY WHO TRAVEL FOR BUSINESS 3+ TIMES ANNUALLY

Nearly half of Italian business travelers (49%) expect declines in new business due to lack of in-person meetings, and more than 2 in 5 (42%) anticipate fewer contracts or deals that would require in-person meetings.

Italian business travelers predict a new normal for business travel post-COVID.

Nearly all Italian business travelers (97%) expect a “new normal” with changing norms and practices. Specifically, close to a third (30%) expect limiting the use of public transportation and 25% predict using their personal vehicle for traveling. Nearly a fifth (18%) expect to avoid airports in major cities, while 16% expect enforced quarantine upon arrival. Additionally, over 1 in 10 (13%) expect to prioritize taking the shortest route between locations, such as direct flights.

While travel may look different post-COVID, 76% of Italian business travels do not expect to routinely limit attendance at events and conferences (compared to 65% globally), suggesting changes will be needed to meet their new expectations.

COVID-19 means new rules for travel etiquette—and an increased risk of discrimination.

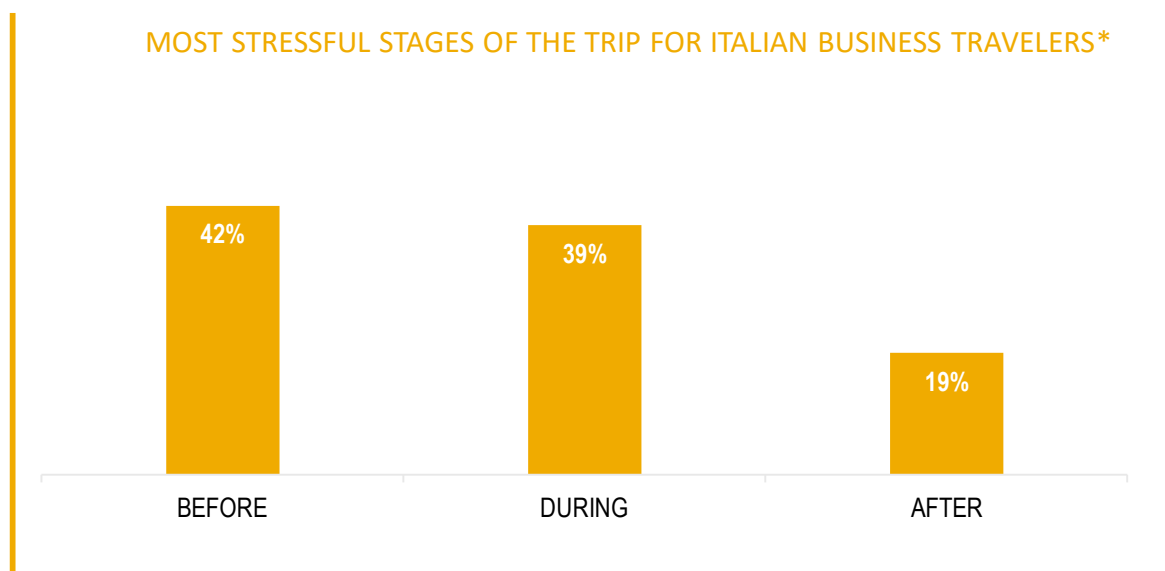
Almost 2 in 5 (38%) Italian business travelers predict travel-enforced social distancing, and nearly as many travelers (18%) predict alternative touchless greetings to stand in for handshakes.

* Small base size; directional findings only.

Troublingly, the vast majority of Italian business travelers (90%) expect increased discrimination in the wake of COVID-19, especially against travelers exhibiting cold or flu symptoms (47%), travelers of Asian descent (31%) — and travelers from countries with high infection rates (29%). Italian business travelers also predict that there will be an increase in discrimination against the elderly (25%) and those wearing enhanced personal protective equipment (20%).

The trip itself is the second most stressful stage of travel for Italian business travelers.

More than 2 in 5 Italian business travelers say they experience the most stress **before the trip (42%, compared to 26% globally)**, followed by during the trip (39%). Less than 1 in 5 (19%) say they are most stressed after the trip. Italian business travelers from companies that do not use a TMC (47%*) are more concerned about the actual trip than those at companies using a TMC (31%*).



More than a third (35%) say their health and safety is their top priority while traveling for business—more than twice as many who say business needs (14%). Given this stress, it stands to reason that 92% of Italian business travelers feel concerned about resuming travel. They are especially worried about the possibility of infecting family (56%) or getting sick themselves (50%). Additionally, the trip itself is likely to be anxiety-inducing: among those with concerns, 50%* are concerned about being on a plane, followed by using public transportation (32%*), staying in a hotel (33%*) and being on a train (33%*).

Companies should help to meet the expectations of Italian business travelers—or risk the consequences.

All Italian business travelers (100%) consider some measures critical for safely returning to the road, especially limiting travel to only the most critical trips (47%), mandatory personal health screenings for traveling employees (44%), and easier access to personal protective equipment (32%). The anticipated implementation of these various safety measures might be why over 1 in 10 Italian business travelers (12%) also believe pre-trip approvals are critical to safely return to the road.

Among Italian business travelers who see the need for changes, 35% say they would ask to limit travel if their company does not implement the measures they want—and 26% would look for a position that does not require travel, including 10% who would consider a position at a different company.

* Small base size; directional findings only.

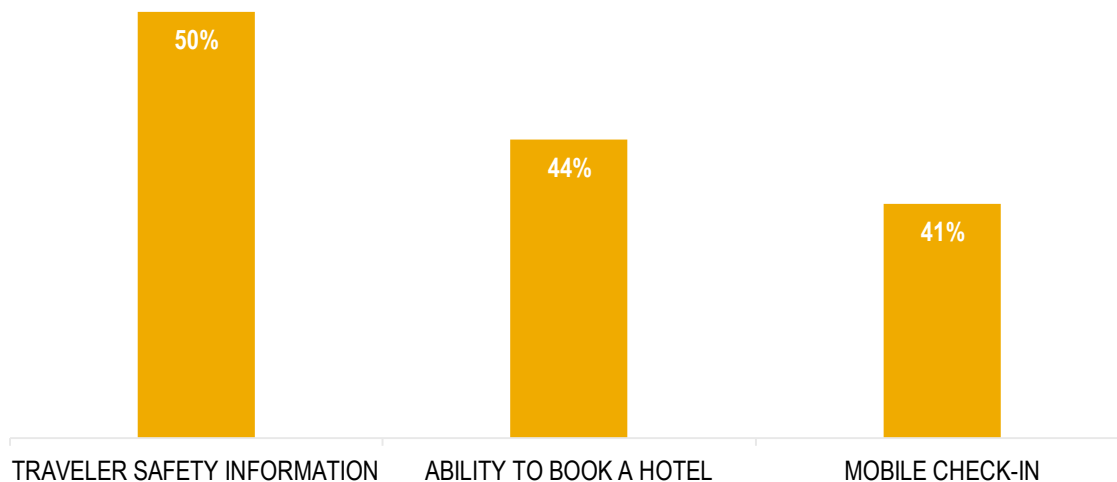
Italian business travelers say training can go a long way to helping them safely return to the road.

A powerful 95% of Italian business travelers say company trainings would be beneficial, especially trainings on how to protect their health and safety while traveling (48%) and how to maintain healthy habits while traveling (39%). Other popular trainings include travel and expense policies (20%) and traveling more sustainably (23%).

Italian business travelers want tech that can keep up.

The most important mobile app features for Italians when business travel resumes include traveler safety information (50%), followed by the ability to book a hotel (44%), mobile check-in (41%) and the ability to view and manage their trip itinerary (33%). A fifth (20%) also want automatic notifications for out-of-policy bookings or expenses. Ultimately, Italian business travelers are looking to a broad swath of on-demand functions, including the ability to track and offset their carbon footprint (25%) and the ability to automatically create and submit an expense report (20%).

TOP MOBILE APP FEATURES FOR ITALIAN BUSINESS TRAVELERS*



*ASKED AMONG 100 BUSINESS TRAVELERS FROM ITALY WHO TRAVEL FOR BUSINESS 3+ TIMES ANNUALLY

Italian business travelers hold government and themselves accountable—but employers aren't off the hook.

When travel starts, Italian business travelers are most likely to start their booking directly with an airline or hotel website/app (28%), with internet search engines (24%), or with online travel agencies (21%). Comparatively, only 14% will go to their company's travel agency and only 13% expect to first use their company's travel booking. The popularity of booking directly had some differences based on a company's travel policy: 38%* of travelers with no written policies book directly on an airline or hotel's website or app, more than the 26%* of travelers with guidelines or mandated policies who book directly.

Of all markets surveyed, only in Italy do a plurality of travelers hold the government (30%, compared to 13% globally) most accountable—but 21% hold themselves most accountable for protecting their own well-being once business travel resumes and 20% say their employer will be most accountable. Travelers also hold lodging providers (8%), transportation providers and airlines (7%), local transit authorities (6%) accountable—in other words, everyone must help travelers feel safe.

* Small base size; directional findings only.



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METHODOLOGICAL NOTES

The SAP Concur Survey of Business Travelers was conducted by Wakefield Research (www.wakefieldresearch.com) between May 20th and June 9th, 2020. The survey was conducted among 4,850 Business Travelers who travel for work requiring an overnight stay 3+ times per year. The survey was conducted in 23 markets: US, Canada, Brazil, Mexico, UK, France, Germany, ANZ region (Australia and New Zealand), SEA region (Singapore, Malaysia), Greater China, Hong Kong, Taiwan, Japan, India, Korea, Italy, Spain, Dubai, Benelux (Belgium, Netherlands, and Luxembourg), Sweden, Denmark, Norway, and Finland.

Results of any sample are subject to variation. The overall margin of error for this survey of 4,850 respondents is +/- 1.4 at 95% confidence. Meaning, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 1.4 percentage points from the result that would be obtained if interviews had been conducted among all persons in the universe represented by the sample. Margins are slightly larger for subgroups. The margin of error for the 100 respondents from Italy in this study is +/- 9.8 at 95% confidence.