



Travel Smart

Business travelers want corporate executives to set flying reduction targets - Survey

November 2022

Summary

The COVID19 pandemic caused unprecedented disruptions in global business travel. As the world emerges from the pandemic, businesses are now at a crossroads. Will corporate leaders return to 'business as usual' flying? Or will they define more purposeful travel, innovating better ways of connecting for the well-being of their employees and the planet?

The [Travel Smart Campaign](#), a global effort aimed at encouraging companies to reduce their business air travel emissions, has commissioned a survey, conducted by Ipsos, of the opinions of corporate employees and business travelers in a representative sample of 2,506 respondents across the United Kingdom (UK), France, Germany, Spain and the United States (U.S.). The results show a clear direction in what employees and business travelers want:

1. Three quarters of employees want their company to set targets to reduce flying. Three in five business travelers report flying less than they were before the pandemic, and believe employees play an important role in driving change in their company's travel policy.

2. A majority of business travelers are ready to take steps to reduce the impacts of their travel. Among expanded choices in low-carbon alternatives to reduce flying, over half of travelers prefer virtual collaboration technologies, and one third less frequent flying and opting for other modes of transport.

3. Over half of travelers report good impacts on their work-life balance, productivity and health from reduced travel. 67% are willing to avoid long-haul flights by planning more local meetings than global meetings, while even more (72%) are willing to take fewer flights for internal meetings.

The survey comes at a time when there is a growing sense that lower levels of business flying are here to stay. Roughly three in five business travelers report flying less compared to before the pandemic. Of those who travel regularly (1,279 business travelers across five countries), 63% have curbed their flying habits as a result of the pandemic.

The pandemic has shown the ease with which business travelers can reduce corporate flying, turning to expanded choice in other low-carbon alternatives. The Travel Smart Campaign calls on corporate leaders to replace long-haul flying with virtual collaboration technologies, reduce frequent flying and shift to high-speed rail where possible.

Companies should seize the moment to pledge to keep their company's air travel to under 50% of pre-pandemic levels, as a key measure to cut corporate emissions.

1. Context and objectives of the survey

During the early phase of the pandemic, global flying ground to a halt. In 2020, air travel experienced a massive drop to 35% of 2019 levels. In 2021, flying was still at just over 40% of pre-pandemic levels.¹

At the same time, businesses successfully adapted to a new way of working. Many companies were still able to continue their projects, maintain connections with customers and even grow. The ease with which many employees and customers adjusted to being home and flying less revealed that those long-held ideas of the need to fly for work no longer stand.

A pan-European survey conducted in January 2021 revealed a significant change in work life and business connectivity. A large majority (70%) of European business travelers stated that the shutdown of air travel during 2020 either had no impact on their work lives, or improved their work life. And 42% of these business travelers said they would fly less often as a result of video conferencing software, even once COVID19-related travel restrictions were lifted.²

As the world emerges from the pandemic, businesses are now at a crossroads. While international business travel remains at 50% of pre-pandemic levels, domestic travel is back to over 60%.³ At the same time, millions of workers plan to switch jobs in pursuit of better work-life balance.⁴ Will corporate leaders return to 'business as usual,' 'road warrior' flying, the most carbon-intensive and fatiguing way of travel? Or will they draw on lessons learned to define more purposeful travel, innovating better ways of connecting for the well-being of their employees and the planet?

¹ International Air Transport Association [press release](#), 25 January 2022.

² YouGov [poll](#) commissioned by the European Climate Foundation, April 2021.

³ Global Business Travel Association, Business Travel Recovery [poll](#), October 2022.

⁴ Forbes, [Millions of Workers Plan to Switch Jobs in Pursuit of a Work-Life Balance](#), 23 June 2021.

At this crucial moment, the Travel Smart Campaign decided to survey employee opinion in Europe and the United States. The campaign is a global effort aimed at encouraging companies to reduce their business air travel emissions, keeping flying to under 50% of pre-pandemic levels. *Travel Smart* champions expanded choice in low-carbon alternatives for connectivity, promoting innovation in new and better ways of doing business for a healthier workforce and a safe climate.

The objective was to have an up-to-date picture of the views of business travelers on travel behavior and attitudes, climate action and employee well-being, and provide corporate decision makers with a clear understanding of what employees expect from a corporate responsibility point of view.

2. Methodology of the survey

The survey was commissioned by the Travel Smart Campaign, and carried out by Ipsos, one of the largest market research and polling companies globally, and conducted as follows:

- Fieldwork was undertaken between 6 – 10 October 2022.
- The total sample size was 2,506 adults across five countries in Europe and North America – U.S., U.K., France, Germany and Spain. To qualify for the survey, respondents had to be employed full-time at an organization with at least 50 employees.
- The sample size included 1,279 business travelers, referring to those that say they flew for work before COVID or currently fly for work.
- The survey was conducted online.
- The data for the total sample were weighted based on demographic targets for all employed adults in each country.

3. Main results of the survey

Overall, the results indicate that there is strong support by employees for reduced corporate flying, a shift to low-carbon alternatives to reduce environmental impacts, and more purposeful travel to avoid unnecessary trips and minimize high-emissions long-haul flying. A high proportion of employees believe businesses should act in the fight against global warming, setting flying reduction targets and travel policies. They are willing themselves to make changes to their travel patterns for sustainability, and also believe they have an important role in shaping their company's travel policies, including to take into account employee well-being and work/life balance.

These results confirm the lasting effect of changes in employees' workplace expectations and travel habits post-pandemic, consistent with earlier polling showing readiness to fly less and use more video conferencing, even once travel restrictions were lifted. This tracks closely with current studies concluding that the business travel downturn is likely permanent, with 40 to 60% of global business travelers previously traveling three times a year or more, not planning to make any more trips.⁵

⁵ Morning Consult, [The State of Travel & Hospitality report](#), H2 2022.

3.1 Three quarters of employees want their company to set targets to reduce flying

Strong majorities of full-time employees in each country believe businesses must play an important role in fighting climate change, including setting targets and travel policies to reduce levels of corporate flying.

When asked about corporate responsibility, carbon footprint and climate action:

- Over seven in ten employees believe that a business has an important role to play in the fight against climate change (77%) , and that an important factor for reducing a business’s carbon footprint is curbing flying (74%).

A business has an important role to play in the fight against climate change	Total	U.S.	U.K.	France	Germany	Spain
A business has an important role to play in the fight against climate change	77%	77%	79%	80%	75%	75%
An important factor for reducing a business’s carbon footprint is reducing levels of corporate flying	74%	72%	75%	76%	72%	75%
To reduce levels of corporate flying, a business must set targets and include travel policies	74%	73%	71%	77%	70%	77%

- 62% of business travelers surveyed say they are flying at least somewhat less than they used to before the start of the pandemic, including 23% that have stopped flying altogether. Among all full-time employees surveyed, more than half (55%) say they currently never fly for work.

Base: Business Travelers	Total	U.S.	U.K.	France	Germany	Spain
I have stopped flying for business altogether	23%	22%	24%	22%	28%	17%
I fly for business much less than as I used to	19%	19%	18%	18%	18%	20%
I fly for business somewhat less than I used to	21%	23%	18%	21%	22%	19%

Base: All Respondents	Total	U.S.	U.K.	France	Germany	Spain
Never travel for work	55%	50%	62%	66%	54%	44%

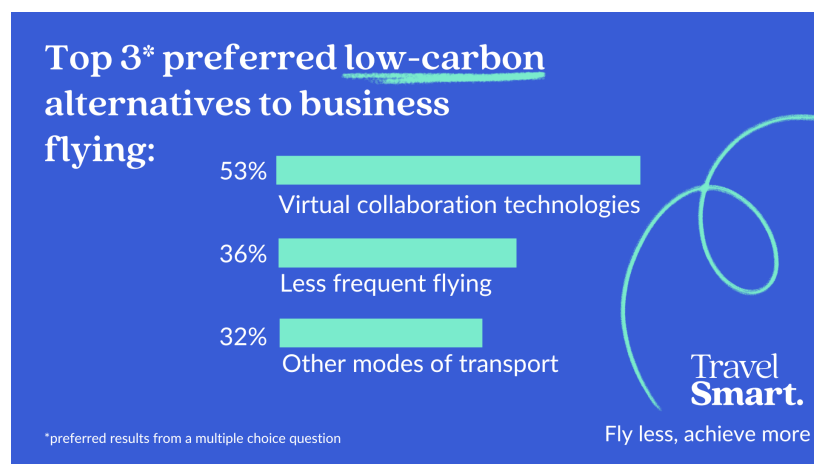
3.2 A majority of business travelers are ready to take steps to reduce the impacts of their travel

Most respondents are willing to make changes to their travel patterns for sustainability, with even more believing businesses must play an important role. And 60% of business travelers say that they play an extremely or very important role in changing their company’s travel policy.

- More than a third of business travelers are completely willing to take fewer flights for internal meetings, or plan more local meetings than global. A quarter of them are completely willing to prioritise travel according to a carbon budget (29%), or making each trip a longer stay (26%).

Base: Business Travelers	Total	U.S.	U.K.	France	Germany	Spain
Taking fewer business flights for internal meeting	38%	36%	36%	39%	40%	37%
Planning more local meetings than global meetings	35%	39%	36%	34%	30%	34%
Prioritising travel according to a carbon budget through setting a cap on total allowable carbon	29%	33%	28%	29%	26%	27%
Making each trip a longer stay	26%	32%	27%	22%	24%	25%

- Among expanded choices in low-carbon alternatives to reduce flying, over half of travelers prefer virtual collaboration technologies, and one third less frequent flying and opting for other modes of transport.



3.3 Over half of travelers report good impacts on their work-life balance, productivity and health from reduced travel

Employees also saw work-life balance, health and well-being as amongst the most significant factors for a company’s decision to reduce the amount of employee flights.

- Half or more of these business travelers report that the reduction in travel in the last few years has had a great or good amount of impact on their work-life balance (55%), productivity levels (50%), health (50%) and motivation levels (49%).

Base: Business Travelers	Total	U.S.	U.K.	France	Germany	Spain
Work-life balance	55%	63%	60%	39%	51%	56%
Productivity levels	50%	58%	62%	33%	51%	52%
Health	50%	57%	51%	32%	52%	54%
Motivation	49%	52%	51%	40%	52%	51%

- A strong majority (75%) believe that cost savings for the company will have at least some influence on the company’s decision to reduce the amount of work flights taken, followed by employee work-life balance (62%), and health and well-being (62%).

Base: All Respondents	Total	U.S.	U.K.	France	Germany	Spain
Cost savings	75%	74%	70%	73%	77%	82%
Work-life balance	62%	63%	57%	61%	64%	69%
Health and well-being	62%	64%	56%	58%	65%	68%

3.6 Conclusions

Overall, the results indicate that there is strong support by employees for reduced corporate flying, a shift to low-carbon alternatives to reduce environmental impacts, and more purposeful travel to avoid unnecessary trips and minimize high-emissions long-haul flying. Across countries, expanded choices in low-carbon alternatives are available to drive the changes in business travel employees are seeking.

Key demands

Corporate leaders have a key role to play in innovating new practice in business connectivity, by:

1. Seizing the moment to pledge to keep their company's air travel to under 50% of pre-pandemic levels, as a key measure to cut corporate emissions.
2. Redefining purposeful travel through travel policies that prioritize replacing long-haul flying by virtual collaboration technologies, reducing frequent flying, and shifting to high-speed rail.
3. Reducing their emissions and publicly reporting on progress achieved.

Governments can play their part to ensure that air travel targets are required in corporate climate plans and emissions reporting.

The benefits of reducing long-haul business flying and its disproportionate impacts have never been clearer. Corporate and government decision makers should seize this golden opportunity to lock in the lower levels experienced by the pandemic, and align with employees' expectations.

Further information

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