

# MEET TOMORROW'S BUSINESS TRAVELERS

Who is shaping the future of  
business travel?

March 2025

# Introduction

## Introduction from Ipsos

Welcome to this report into the future of business travel.

American Express Global Business Travel (Amex GBT) has partnered with Ipsos to conduct a horizon scan of the drivers of change for this fast-evolving sector.

We have supplemented this with a new survey of business travelers in the US and UK to understand their views on some of the big changes that are occurring, as well as expert consultations from Amex GBT and its customers.

## Reading this report

In this report we detail the context that is shaping the sector, before exploring the two axes of uncertainty that will shape tomorrow's business travelers.

We then detail what our survey reveals about what the needs of the business traveler of the future might look like.

The data is presented unweighted due to the target audience: full technical details and reporting conventions are provided in the appendix.



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**WELCOME TO  
THIS REPORT**

**01**

# Welcome

**We know travel is a powerful source of business value – driving growth, enabling innovation and company culture.<sup>1</sup>**

As the workplace and business travel evolve, we partnered with Ipsos to explore what travel means to business travelers today and understand the role it plays in their personal lives and career development.

Reviewing the data, it's clear most employees see business travel as something that enhances working life, many regard it as a perk, most look forward to business trips.

**The majority believe business travel will get easier in the future and many expect to be doing more in five years' time.**

But look closer, and not everyone fully shares in that positivity.

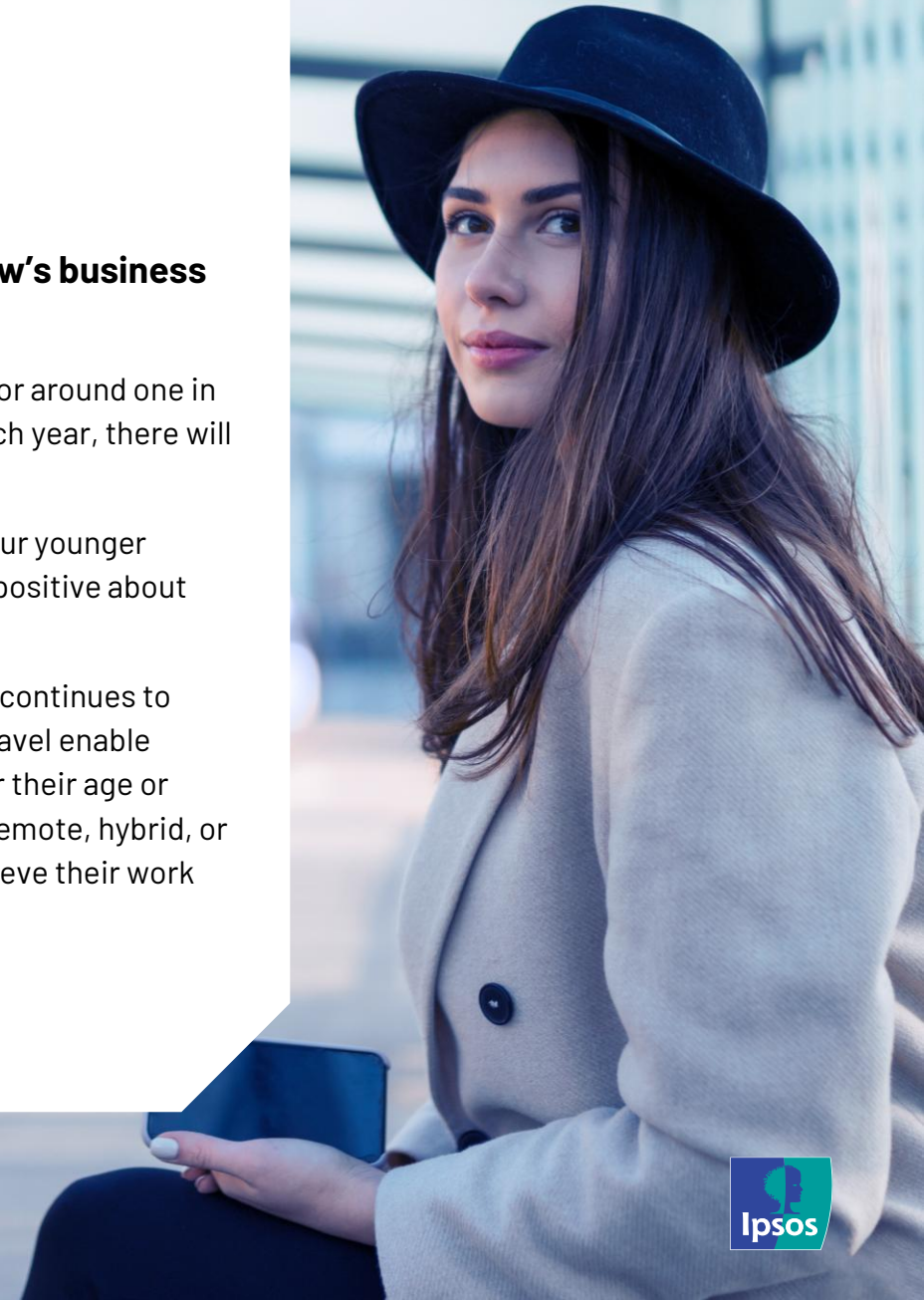
Travelers from Generation Z (aged 28 and under) are more likely than people from older cohorts to say business travel is stressful; less likely to see travel for work as a perk; less likely to connect career progress with travel; and feel more guilt about its environmental impact.

**Gen Z are tomorrow's business travelers.**

Today, they account for around one in ten travelers; with each year, there will be more of them.

So, how can we help our younger colleagues feel more positive about business travel?

And as the workplace continues to transform, how can travel enable employees – whatever their age or work arrangements (remote, hybrid, or office based) – to achieve their work and personal goals?





# Welcome

**According to the employees we surveyed, digital tools and technologies like AI can help to give travelers good experiences.**

But as the data indicates, the most effective travel programs balance digital and human support.

Each organization will find its own balance, depending on its culture, business focus, and employees' preferences. We hope this report helps you find the best balance for your travelers.

Thank you to the Amex GBT customers who helped us create this report – your insight and advice were invaluable.



*Evan Konwiser*  
**Chief Product and  
Strategy Officer,**  
**Amex GBT**



# A CONTEXT OF RISING DISRUPTION

# 02

Ongoing evolution in the landscape  
of business travel

# The good news: Business travel is popular and well-regarded

## **Our new survey reaffirms the importance of travel for work.**

In our survey of UK and US employees who travel for work, roughly six in ten agree that there is no substitute for face-to-face time with clients and colleagues, with limited variation between age groups and work location.

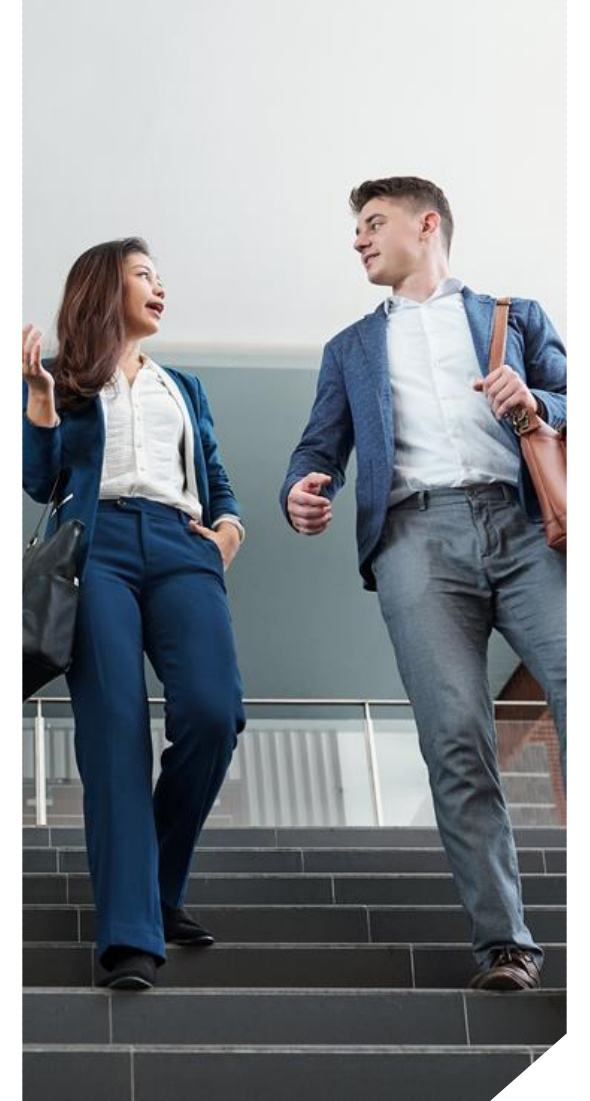
It is also clear that travel is an appealing incentive for many. As detailed overleaf, key phrases associated with business travel include “good for my career” and “motivating”.

Sixty-nine per cent of all business travelers agree that they look forward to work trips and 55% say traveling for work is a perk that makes their work more interesting and rewarding. Only 15% see it as a chore.

One quarter (26%) say that if they were looking for a new job, opportunities for travel would be one of the most important factors they would consider, rising to almost half (45%) of the most frequent travelers.

## **In fact, many would like to travel with their companies more.**

There is an expectation from many that they will travel more for work in the future, with 55% expecting an increase over the next five years and just ten per cent expecting a decline.





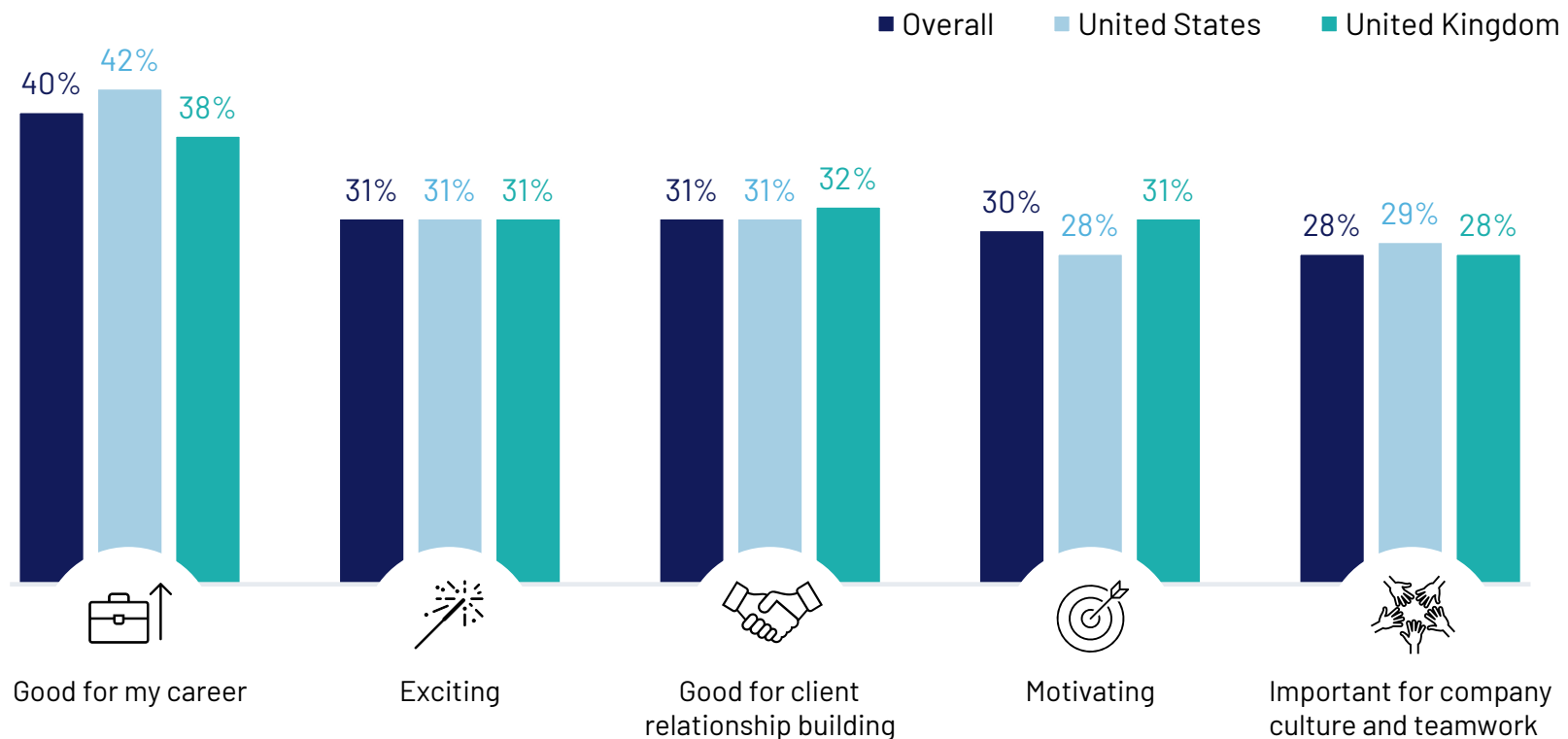
# Business travel – good for me, my career, my company

## Strong positivity around business travel

Word association for business travel is strongly positive – the top five responses for UK and US travelers are shown to the right.

There are signs of negativity at the fringes: Generation Z travelers (aged 28 and under) are slightly more likely to pick words like “stressful” and “exhausting”. Older groups are more likely to feel it is a “necessary evil”. But these terms are far from the top five.

The most frequent travelers are especially likely to see business travel as good for company culture and client relationship building, too.



Question: Thinking about all the times you have traveled for work, which of the following words and phrases, if any, best sum up how you feel about travel for work? Top five responses  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 – 25 September 2024  
 Source: Amex GBT x Ipsos

# But there are clouds on the horizon

This rosy picture is likely to encounter turbulence over the coming years. Our horizon scan identifies five likely sources of future friction that may threaten business travelers' positivity further ahead:

## Fragmenting traveler needs

The types of people traveling for business, the purposes for which they travel, and their expectations around the roles business travel plays in their wider lives, are becoming more varied.

This is set to increase the tension that already exists between a desire for greater simplicity and personalization on the part of travelers, and businesses' interest in controlling how people travel for work. Getting this wrong may fuel travel fatigue.

Already, less than half of travelers say they "always" use managed channels for work travel;<sup>1</sup> this proportion may fall further.

## Moving beyond "Bleisure"

Flexible working policies have created new patterns and possibilities that blend business with leisure which are now fully mainstream: two-thirds of corporate travelers said they extended a business trip for leisure in 2023.<sup>2</sup>

This expectation of flexibility and autonomy may be hard-wired into business travelers, particularly younger cohorts. It will extend to more areas of personal and professional life, bringing with it opportunities and threats for businesses – and shaping employee satisfaction with business travel experiences.

## Intentional travel

Continued cost pressures are creating a greater need to demonstrate a clear return on investment in business travel.

Against a backdrop of rising costs and disruption, business travel will become more intentional, requiring travelers to prioritize opportunities for travel.

The focus is likely to be on those that offer the best chance of creating value, boosting productivity, collaboration or innovation, or align closest with their company's culture and values.



It used to be pretty standard to fly across the country or over the ocean for a day.

The expectation now is that I'm going to go, spend the money, fill the days with meetings that are going to contribute to the return on investment for the company"

**Colleen Kearney**

Global Corporate Travel Leader, RTX

# The disruption will be normalized, while climate action will ebb and flow over time

## **Disruption is not “new news”. But business travel won't be as simple as before**

While travel has always faced disruption, the impact of COVID-19 has been unusually prolonged.

“Outside-in” factors like extreme weather and geopolitics, as well as “inside-out” factors such as changes in traveler needs, mean that this patch of unpredictability and turbulence is expected to continue into the medium term, at least.

The result is a change in the outlook of business travelers, making them more attuned to disruption; Amex GBT's After Hours Servicing call volumes have increased by half compared with 2019.<sup>1</sup>

## **Agility and resilience is key**

Repeated exposure to travel disruption may negatively affect traveler attitudes, leading to higher anxiety around business travel, as well as greater desire for trips that are secure, well-planned and more predictable.

In this context, it is likely the “just in case” mindset will triumph over “just in time”.

Companies will be expected to be more agile – but also more resilient – in the future. This means future business travel will need to focus more strongly on security and employers' duty of care to employees, alongside responsiveness and deep knowledge to care for employees.

## **Pressure to act on climate change will wax and wane**

Many countries and companies have committed to stretching climate goals; with 2030 serving as a critical milestone.

Further into this decade, the scale of the challenge will come into clearer focus: Already, the UK and the US are rated as ‘Insufficient’ in their work to reduce emissions to keep global heating within the 1.5°C limit set by the Paris Agreement.<sup>2</sup>

The priority climate action is given by politicians, business leaders – and the public – will rise and fall over the coming years. But by 2030, it is likely that companies will be looking at how to balance their sustainability

commitments with practical business needs. This will put more focus on clearer emissions reporting and offering solutions that cut emissions from the entire business travel supply chain.

Demonstrating green values will be important to increasingly sustainability-minded employees, yet employee travel behaviors are another question mark. It seems unlikely the gap that exists between individuals' green intentions and their more polluting real-life actions will narrow.

As the 2020s wear on, this tension will put greater emphasis on company action, mandates, and leadership.

# MEET TOMORROW'S BUSINESS TRAVELERS

# 03

How will generation and location influence the needs and interests of future business travelers?



# Against this backdrop, what will tomorrow's business travelers be like?

## The macro picture is one of significant uncertainty

The broadly positive sentiment we have uncovered towards business travel is likely to come under increasing pressure as the factors driving disruption – geopolitics, traveler preference, and extreme weather to name just a few – strengthen and proliferate.

And while the survey findings are indeed positive, they represent the view of today, not the view of tomorrow.

## Who are the business travelers of tomorrow?

Analysis of wider evidence and new survey data identifies two important factors that will shape tomorrow's business travelers.

- The first is **generation**: Gen Z will progressively take up a larger chunk of the workforce, so understanding their values is vitally important.
- The second is **location**: where you work has an important bearing on what business

travel is for and how people feel about it.

On the following pages, we detail the influence each of these factors has on traveler satisfaction and experience.

How these factors develop and interact will shape who tomorrow's business travelers are, how they approach work trips, and what their needs and expectations will be in the future.

# Positivity for business travel is more muted among Generation Z



## Generation Z (age 28 and under)

**53%** agree there is no substitute for face-to-face time with colleagues

**45%** experienced a lot or a fair amount of disruption in their work travel plans

**65%** would have liked to have extended their last work trip to include more leisure time



## Millennials (age 29 – 44)

**59%** agree there is no substitute for face-to-face time with colleagues

**36%** experienced a lot or a fair amount of disruption in their work travel plans

**74%** would have liked to have extended their last work trip to include more leisure time



## Generation X (age 45 – 58)

**63%** agree there is no substitute for face-to-face time with colleagues

**32%** experienced a lot or a fair amount of disruption in their work travel plans

**65%** would have liked to have extended their last work trip to include more leisure time

## A new outlook, or just a phase?

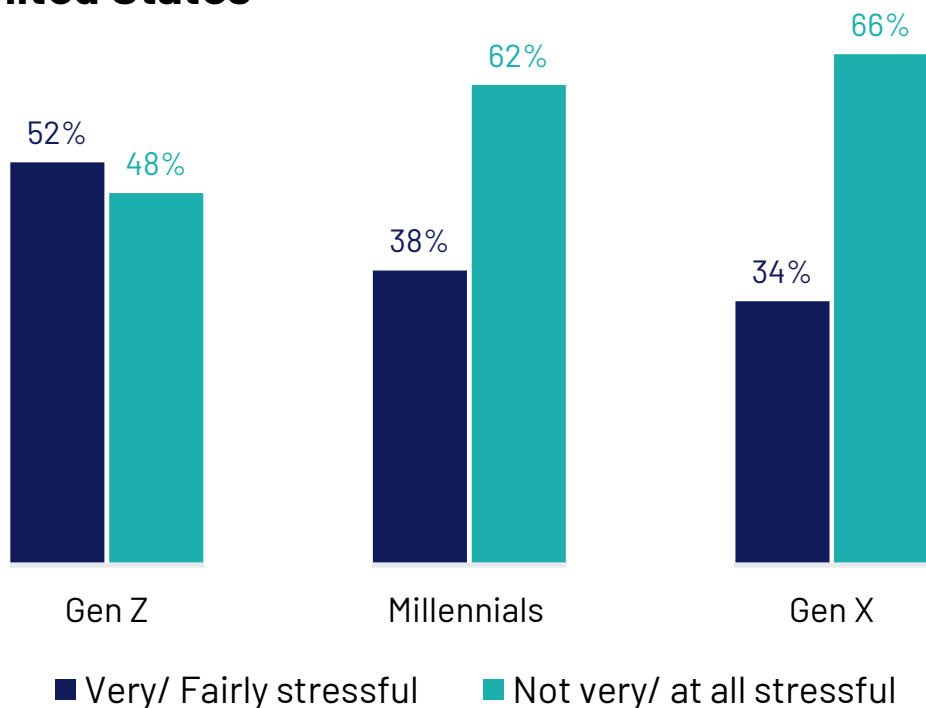
Generation Z – the youngest cohort in the workforce – stands out as having more mixed emotions when it comes to business travel. By comparison, Millennials and Gen X are straightforwardly positive on the importance and rewards of business travel.

Generational differences may be driven by their life stage: Gen Z's ambivalence could reflect their typically less senior roles, lower pay, and shorter engagement with their employers. We could expect views to improve over time as they age.

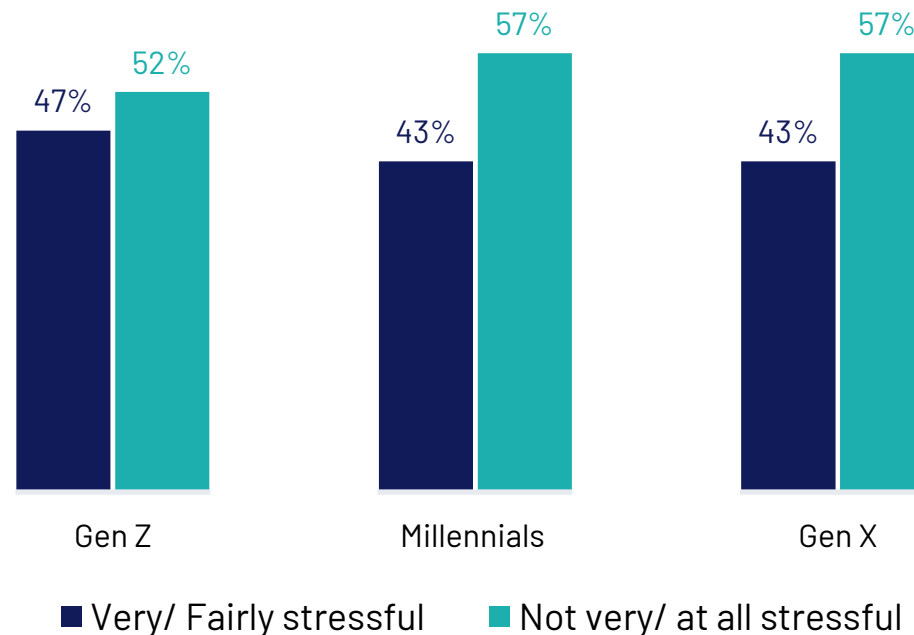
But perhaps there is a unique cohort difference; their reticence may need to be managed over time too.

# Gen Z find traveling for work more stressful

## United States



## United Kingdom



Question: Still thinking about traveling for work how stressful, if at all, do you find traveling for work?  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 - 25 September 2024  
 Source: Amex GBT x Ipsos

# How do we help Gen Z to fall in love with business travel?

## A uniquely disrupted start

Most Gen Z employees have entered the workforce since the start of the COVID-19 pandemic. This ongoing, disrupted, initiation is very different to older generations, who had shorter, sharper shocks in their early years.

## Gen Z's more muted enthusiasm for business travel should be an area of focus.

While it is important to note that they are positive overall, there are warning signs: Gen Z are more likely to report stress in travel, more likely to say they have experienced disruption, and more likely to say they found the process of arranging their last trip difficult.

Amex GBT's data shows that the average age of a business traveler in 2023 was 43.3 – an elder Millennial.<sup>1</sup> This group represents the peak of positivity when it comes to business travel; 74% of Millennials would have liked to have extended their last trip to include more leisure time, compared with 68% overall.

If business travel is currently set up to meet the needs of Millennials and Gen X, then understanding what Gen Z want from travel is the next priority.

## Will Generation Z will follow in Millennials' footsteps?

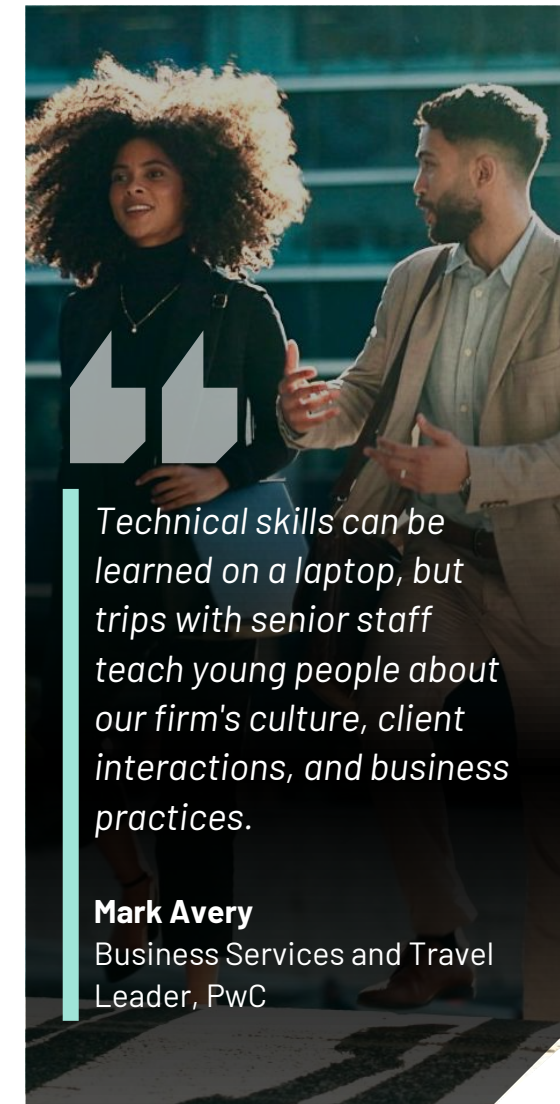
As Gen Z becomes more senior and build their careers in the post-COVID world, will they view travel as positively

as their elder siblings? Or will they be more cautious and concerned, having spent the formative years of their careers working from home? There is a clear case for helping this cohort build excitement around travel for work.

## Providing reassurance in a chaotic-feeling world

Greater emphasis on security and duty of care feels like a clear priority for Gen Z travelers.

Gen Z experience more stress, disruption, and difficulty than older generations – but they are also less likely to appreciate that their employer has a responsibility to keep them safe while they are traveling (63%, versus 68% overall and 73% of Millennials).



*Technical skills can be learned on a laptop, but trips with senior staff teach young people about our firm's culture, client interactions, and business practices.*

**Mark Avery**  
Business Services and Travel  
Leader, PwC



# Location, location, location

## Business travel has different appeal in a distributed workforce

### Three workforces in one

The way people work has clear impacts on their views of business travel.

**Fully remote** workers are the most conflicted – their view is closer to seeing business travel as a necessary evil.

Those in **hybrid working** patterns fall somewhere in the middle; but the data suggests they are getting the best of both worlds, with more opportunities for travel for personal development.

Those who work **full-time at an office** or employer's location have the most straight-forward views and are positive about traveling for work



### Remote workers

**22%** say traveling for work is a chore

**32%** say business travel is good for their career

**43%** experienced a lot or a fair amount of disruption in their work travel plans



### Hybrid workers

**16%** say traveling for work is a chore

**39%** say business travel is good for their career

**39%** experienced a lot or a fair amount of disruption in their work travel plans



### Location workers

**11%** say traveling for work is a chore

**46%** say business travel is good for their career

**28%** experienced a lot or a fair amount of disruption in their work travel plans

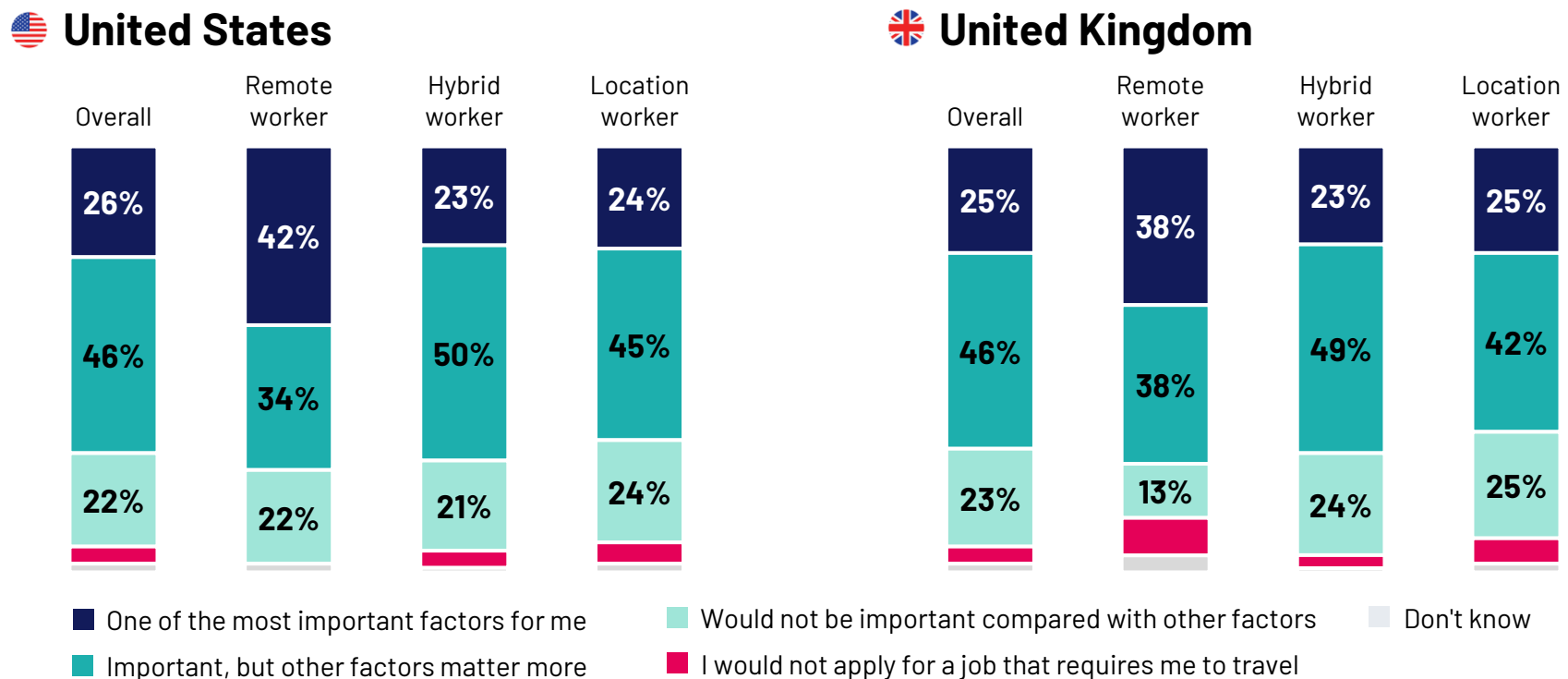
# The business travel tension in a remote workforce

## A benefit and a burden

Fully remote workers are most likely to see traveling for work as a chore – but work trips are, if anything, more important to the appeal of a position.

When asked where travel ranked against other benefits when looking for a new job, four in ten of those who work remotely said it would be one of the most important factors. This is far above the quarter of the overall business traveler population who said the same.

This points to greater tension about travel for remote workers – they think more about it when applying for a job, but also find it more draining.



Question: Imagining that you were looking for a new job, how important would opportunities for travel be for you, compared with other factors like the pay, working hours and benefits it provides?  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 – 25 September 2024  
 Source: Amex GBT x Ipsos

# Hybrid's winning edge

## The best of both worlds?

In those industries where it is a possibility, hybrid working remains in dynamic equilibrium. The balance continues to change, reflecting the relative strength of employees and employers in the labor market.

When it comes to travel for work, hybrid workers tend to occupy the half-way spot between fully remote and fully on-location workers.

For instance, while 46% of full-time location-based workers described business travel as being good for their career and 32% of remote workers said the same, the figure for hybrid workers was 39%.

Yet there are subtle signs that hybrid flexibility increases the variety of reasons employees travel for.

When asked about the purpose of their last work trip, hybrid workers were more likely to report a wider range of travel categories.

This was especially true for client work such as project work, relationship building and sales meetings: this was the aim of the trip for 55% of hybrid employees, compared with 49% of remote and 47% of location workers.

There was also a hybrid edge for personal development such as conferences, training and leadership meetings – 70% against 67% for location and 61% of remote workers.

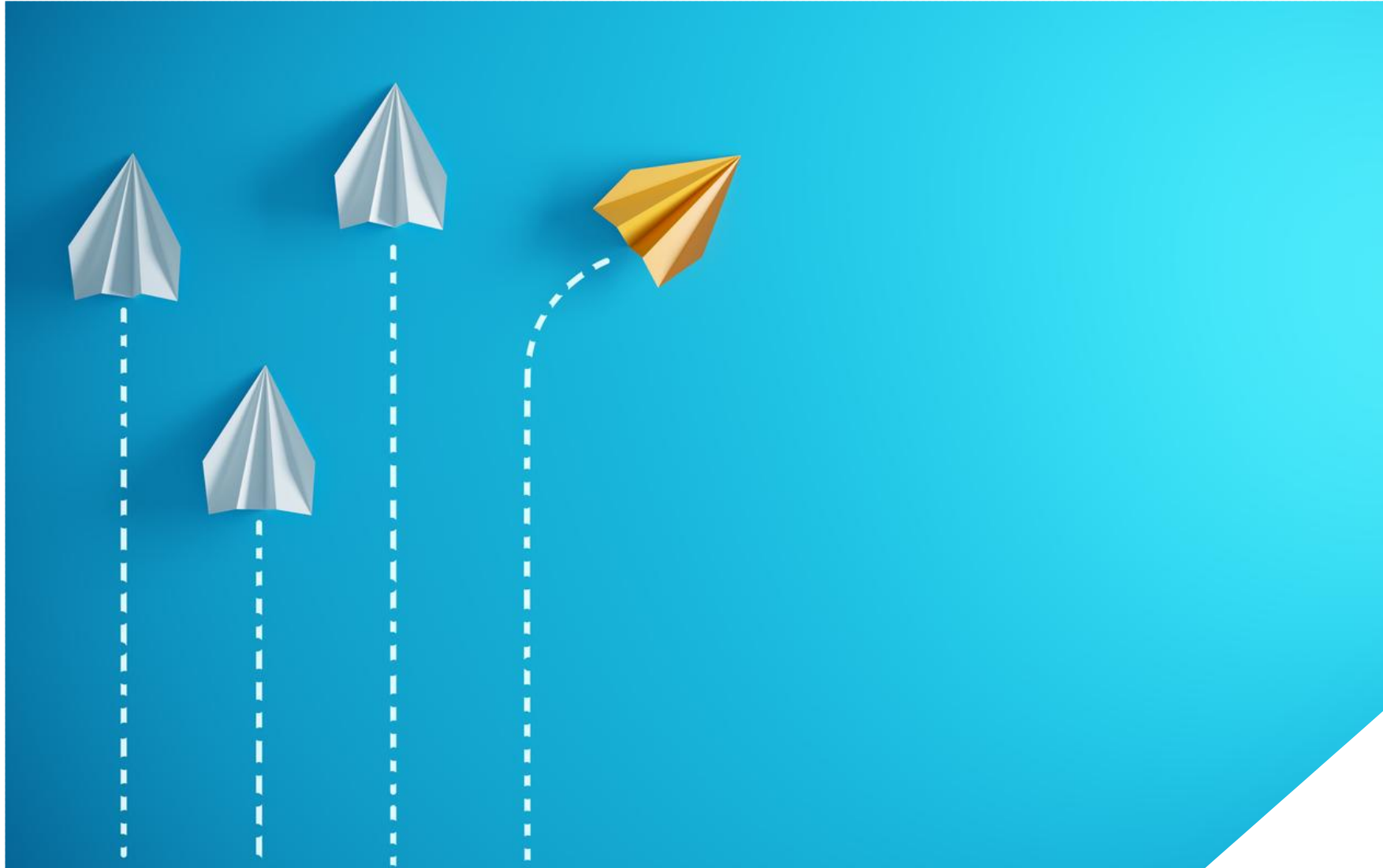


As long as the company can make hybrid work, we're in a good position and working remotely is not affecting our business goals, then we won't change our policy.

If our employees can have that flexibility, then it is a good work-life balance. We're looking for results, content employees, and happy clients.

## Martha Ferguson

Director, Global Head Of Travel Services,  
Lazard & Co



# Many futures for business travel

**Generation and working location are key axes of uncertainty shaping tomorrow's business travelers.**

- While we know that Gen Z will grow as a proportion of the business traveling population, what we don't know is how they will feel about travel.
- By contrast, the future of hybrid working is more dynamic. The equilibrium continues to shift and differs markedly between industry sectors.

How both develop will have important influence on future business traveler needs. We explore this further in the next chapter.

# MEETING THE NEEDS OF TOMORROW'S TRAVELERS

# 04

How to build enthusiasm for business travel in tomorrow's travelers?

# The future of business travel: Easier and more frequent trips?

## Frequency of travel is expected to increase.

In the survey, business travelers broadly expect the amount they will travel in the future to increase: 55% expect to travel more for work over the next five years, while only 10% expect a decline.

Agreement is higher still among the most frequent travelers, 70% of whom expect an increase. It is also elevated among the Millennial generation (61%) as well as those who have taken a "bleisure" trip that merges business and leisure.

## Widespread optimism that travel for work will become easier.

A larger proportion – 65% – think traveling for work will become easier in the future. This view is higher still among the most travel-happy: especially Millennials and those who see travel for work as a perk (both 71%).

However, this optimistic outlook may face challenges if disruption continues to escalate and travelers' needs fragment further.

How can the industry meet these expectations? We have four data-driven recommendations.



# Four areas of need for tomorrow's travelers



## Making travel more **secure**

How can the optimism of tomorrow's travelers be shielded against a rising tide of disruption?



## Making travel more **seamless**

What are the small-scale frictions and pain points that could turn tomorrow's travelers off work trips?



## Making travel more **special**

Bleisure travel is mainstream, but how can the blending of work and personal life be prevented from burdening tomorrow's travelers?



## Making travel more **sustainable**

Value alignment is currently close between workers and firms, but how can businesses manage a widening gap with tomorrow's travelers?

# Making travel more **secure**

While disruption to work travel remains a minority experience among business travelers, it is clearly a significant dampener on enjoyment. Those who report disruption are more likely to show a range of negative sentiments toward travel for work.

The good news is that most employees rate their employers highly at helping them cope with disruption.

However, with perceptions of disruption on the rise, how can businesses better prepare their employees to overcome issues while protecting the warm feelings most have toward business travel?





# Making travel more **secure**

## Impact from disruption is relatively limited at present

### **Disruption to travel plans remains a minority experience.**

Thankfully, most business travelers reported smooth journeys over the past year, although over a third (37%) said they experienced disruption to their business travel plans.

The groups who are more likely to experience disruption are those who are already more negative about business travel – younger people and remote workers. More than four in ten Gen Z travelers reported disruption in the past year (36% for Millennials and 32% for Gen X). A similar proportion of remote workers said the same (43%, versus 39% for hybrid workers and 28% for full-time location workers).

### **At present the impact of travel disruption is relatively limited.**

While business travel disruptions can be frustrating, their overall impact on both personal and professional life appears to be relatively limited.

Only a third of those who experienced disruption said it was a big problem for their personal or professional life (34% and 31%). But again, the impact is greater for younger generations and remote and hybrid workers.

### **Most rate their employers well at providing support.**

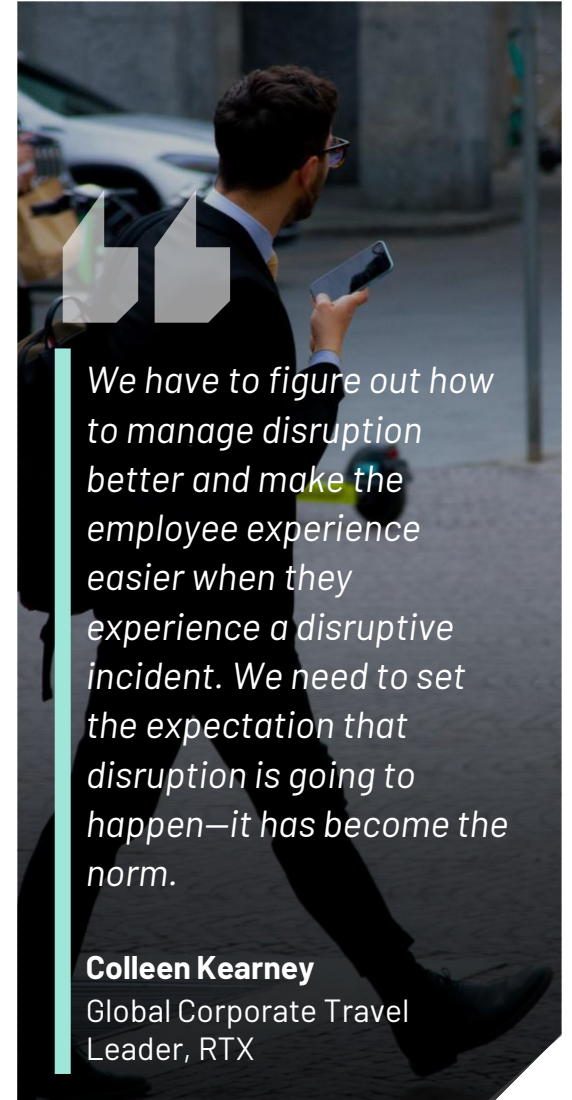
Businesses score well when asked about how they supported employees – close to nine in ten (87%) felt supported during disruptions, with limited variation between age groups and work

location. A smaller proportion – nearly 7 in 10 – say they are aware that their employers are responsible for keeping them safe while traveling for work.

### **Will rising travel disruption stretch existing support?**

Experience of disruption is clearly correlated with more negative views of business travel. Among those who have experienced more disruption to their travel plans, 62% describe business travel as a chore while 57% of this group say they find traveling for work stressful.

If disruption is to become a bigger feature of the future it could overwhelm existing employer support, risking damage to the confidence of travelers – especially younger and remote workers.



*We have to figure out how to manage disruption better and make the employee experience easier when they experience a disruptive incident. We need to set the expectation that disruption is going to happen—it has become the norm.*

**Colleen Kearney**  
Global Corporate Travel Leader, RTX

# Making travel more **secure**

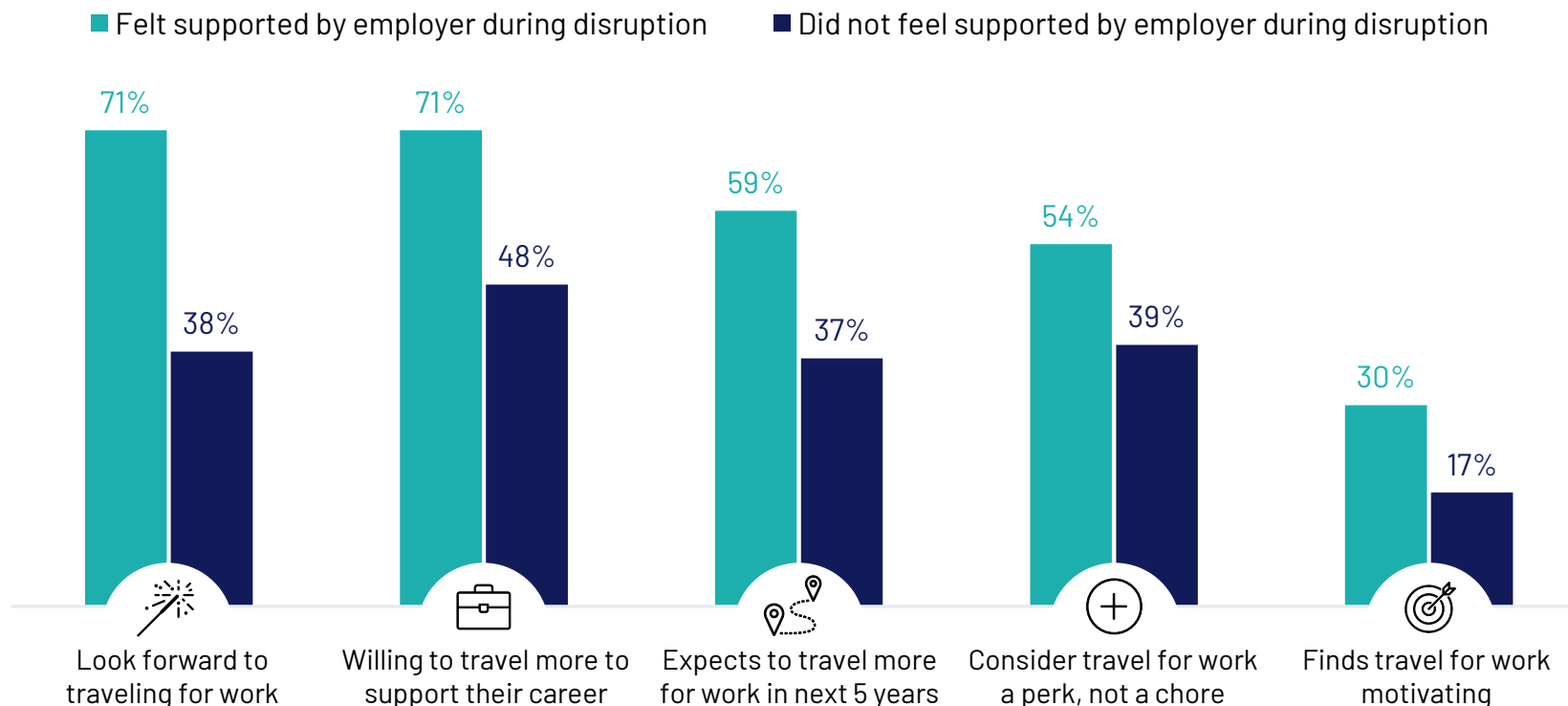
## Support from employers is vital to maintain travel enthusiasm

### Protecting travelers' confidence

A large majority of travelers who experienced disruption to work travel plans say they felt well supported by their employer – 84% in the UK and 90% in the US.

This feeling of protection is vital to maintaining traveler confidence. The proportion of employees who say they look forward to work travel among well supported travelers is double what it is among those who did not feel supported.

This pattern is also found across a range of important indicators of employee willingness, excitement and interest in travel for work.



Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 – 25 September 2024  
Source: Amex GBT x Ipsos



# Will disruption derail the positivity of tomorrow's travelers?

## Rising travel disruptions pose a threat to positive views of business travel in the future.

With disruption on the rise, how can businesses better prepare their employees to overcome issues while seeing travel as a benefit?

Important questions arise around what Ipsos calls "the perils of perception".<sup>1</sup> Firstly, how closely are travelers' views of the risks of disruption aligned with reality? And secondly, how useful do they think the support they receive from employers is to deal with the disruption they are concerned about?

At present, the balance between perception and reality appears close. But if travelers experience more

disruption in the future, things may go awry.

For example, if business travelers of the future are more sensitive to disruption and less excited about business travel, there may be more need for up-front assurances of support. This would be even more important if employees are traveling more often, to unfamiliar destinations, with a different risk profile than more traditional destinations.

But there is also the chance that traveler perceptions would change less than the reality: the question then is, how do businesses strike the right balance between offering reassurance and protecting the excitement of business travel?



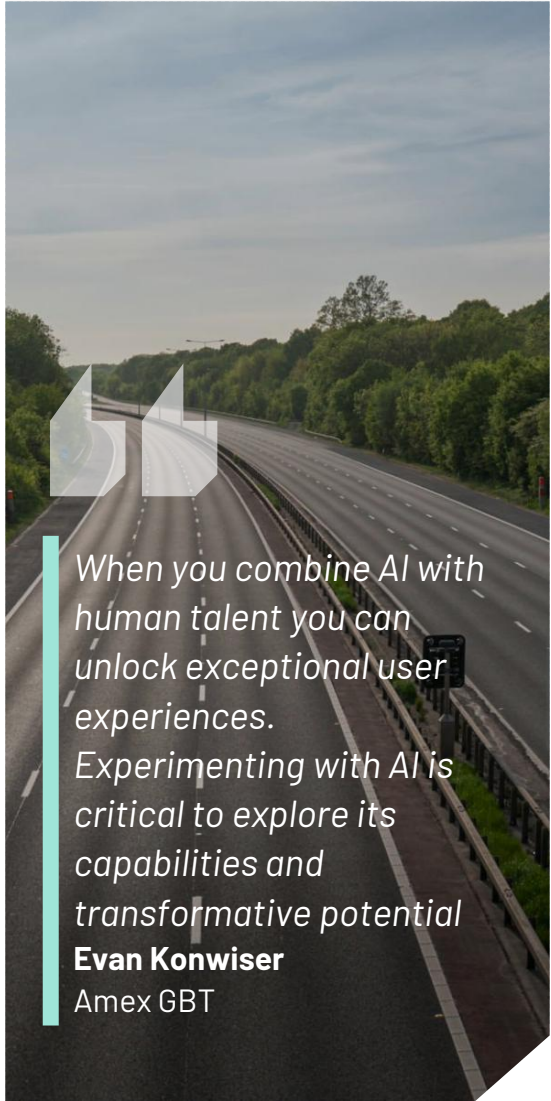
## Making travel more seamless

Despite the positivity we see around business travel, a reasonably large minority of travelers experience friction in arranging their trips. Again, younger travelers appear to experience the most inconvenience.

How can firms smooth the path for tomorrow's business travelers?

We find widespread openness to the use of digital tools and excitement about the role generative AI could play in the future.

The challenge for business is not just to demonstrate the effectiveness of these tools, but also to empower employees to use them confidently.



*When you combine AI with human talent you can unlock exceptional user experiences.*

*Experimenting with AI is critical to explore its capabilities and transformative potential*

**Evan Konwiser**

Amex GBT

# Making travel more **seamless**

## Openness to tech-assisted travel management

### Friction in arranging business travel is relatively widespread

While almost half disagree, over one-third (36%) of business travelers found the process of arranging travel for their last work trip difficult.

Difficulties are higher among the important groups for the future of business travel:

- Greater difficulty for Generation Z (44%) and Millennials (38%), compared with 26% among Gen X.
- Hybrid and remote workers are also experiencing higher levels of friction (39%) compared with location-based workers (30%).

Experiencing friction can take the joy out of business travel; half (49%) of those who said they experienced difficulties in the process of arranging their most recent travel consider traveling for work a chore, rather than a perk.

### Openness to human and self-service solutions

If travelers experience an issue when traveling for work, the uniform preference is for speaking with a person who can help. However the option of self-serving with digital tools also has majority appeal, pointing to travelers being solution-oriented when it comes to dealing with problems, rather than focussing on the channel.

### Excitement around AI in the business travel community

The potential for generative AI solutions to simplify business travel procedures elicits widespread interest.

Three quarters of this audience say they are knowledgeable about this area of technology, while more than half say they are comfortable with chatbots carrying out tasks ranging from completing expense reports, through to booking hotels and restaurants on their behalf.

But there are risks; moving too quickly to use generative AI may result in negative experiences that disenchant travelers with this new technology.

# Making travel more seamless

## Preference for human touch, but room for digital, self-service solutions

### A human-first approach

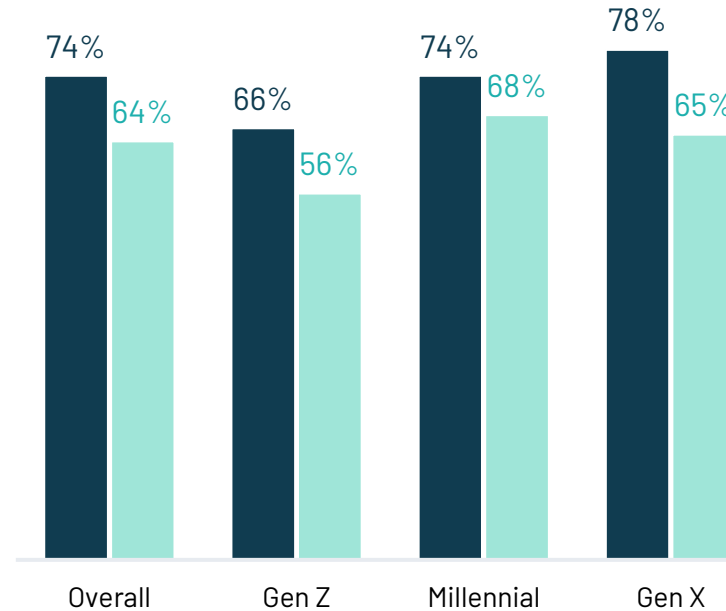
Business travelers are solution-minded when it comes to sorting issues on the road.

Seven in ten say that when something goes wrong when traveling for work, they would prefer to speak to a person who can help them. Yet a slightly smaller majority – closer to six in ten – also say they prefer to use digital tools to find a solution for themselves.

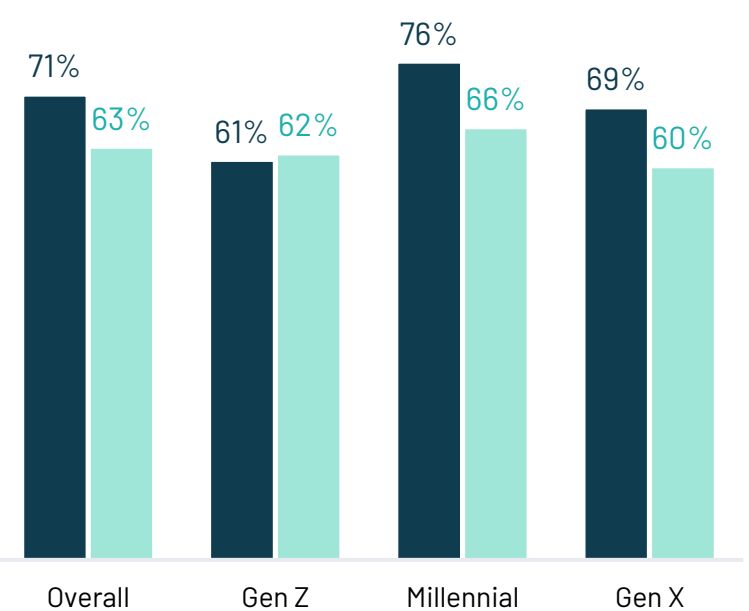
On the one hand, high interest in both approaches reaffirms the importance of human interaction during disruption.

But on the other, it highlights a level of permission to experiment with digital solutions, if the user experience – and most importantly the outcomes – are good.

### United States



### United Kingdom



■ ...I prefer to speak to a person who can help me    ■ ...I prefer to use digital tools to find a solution for myself

Question: If something goes wrong when traveling for work...  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 – 25 September 2024  
 Source: Amex GBT x Ipsos

# Making travel more seamless

## Confidence in generative AI for business travel management

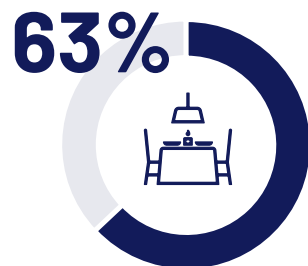
### Gen AI saves the day?

With claimed familiarity with generative AI high - 73% say they know about it - we find most business travelers are comfortable with its use in a broad range of travel tasks.

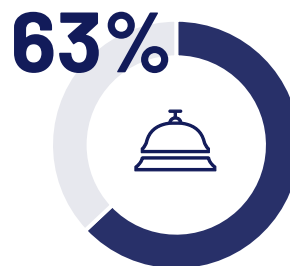
In fact, comfort is highest for tasks that might be considered more personal, such as booking a hotel or restaurant.

Six in ten are comfortable with generative AI booking planes, trains and automobiles, as well as completing expense reports and rebooking flights.

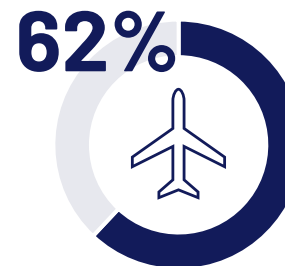
Comfort is lowest in dealing with visas, where the implications of errors might be highest.



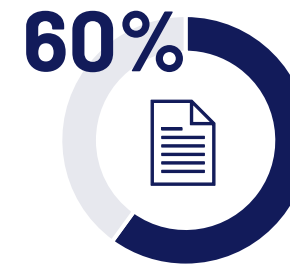
Choosing and booking a restaurant for you



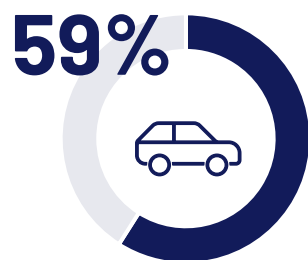
Booking your hotel



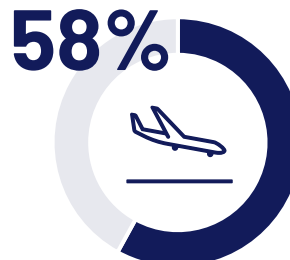
Booking your plane travel



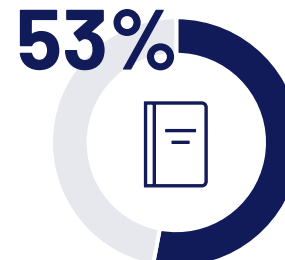
Completing expense reports



Booking your last mile travel such as taxis and trains



Rebooking your flight if it is canceled



Sorting visas and government travel authorizations

**% comfortable with the use of AI**

Question: Thinking about traveling for work, how comfortable or uncomfortable would you be with the use of generative AI in the following tasks?  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 - 25 September 2024  
 Source: Amex GBT x Ipsos



# How will tomorrow's travelers overcome travel frictions?

## The immediate tech fix

Greater use of technology can help an increasingly diverse workforce to navigate a world of rising disruption.

When facing disruption, the impulse for most travelers is to seek support from a human – but digital tools have wide acceptance, too.

Building employee confidence in digital solutions is an immediate step that can help get tomorrow's business travelers back on track.

This can be done by meeting travelers half-way: solutions which are reliable, flexible, and user-friendly will play an important role in ensuring smooth trips for tomorrow's business travelers.

## Human and machine: a powerful cocktail

Looking forward, the human-computer binary will become an outmoded approach. Our world is moving toward a future where human intelligence and artificial intelligence are increasingly blended.

However, the human touch will always remain significant. In the future, the ultimate luxury will be pressing a button and having a "real" person respond.



## Making travel more special

The concept of “bleisure” – personal trips built around travel for work – is well-engrained among business travelers. Amex GBT data suggests that at least a fifth of transactions has a bleisure element, rising to a quarter over the summer and holiday seasons.<sup>1</sup>

However, this flexibility is now cutting both ways: many travelers saying they have added business elements to their personal trips. This poses some questions around compliance and control, as well as where the business duty of care ends.

How can the positives of blended travel for employees be harnessed, while avoiding the pitfalls of a highly mobile workforce?



# Making travel more **special**

## Widespread excitement and interest in blended travel

### **Business travel is an opportunity for adventure**

Three quarters of business travelers say they would like to have more time at the destinations they travel to for work to explore the local area (72%). This rises to 76% of Millennials. Gen Z are again the most reticent, but in this group too, two-thirds agree they'd like more time to explore.

This sentiment is stronger still among frequent travelers: 85% would like to explore more on business trips.

The call of the unknown is strong, too: two thirds (67%) say they would prefer to travel to new and unfamiliar destinations for work.

### **"Bleisure" is mainstream**

Over six in ten (62%) of business travelers say they have extended business trips to include leisure travel. This rises to almost seven in ten (68%) of the most frequent business travelers, 66% of fully remote workers and 65% among Millennials.

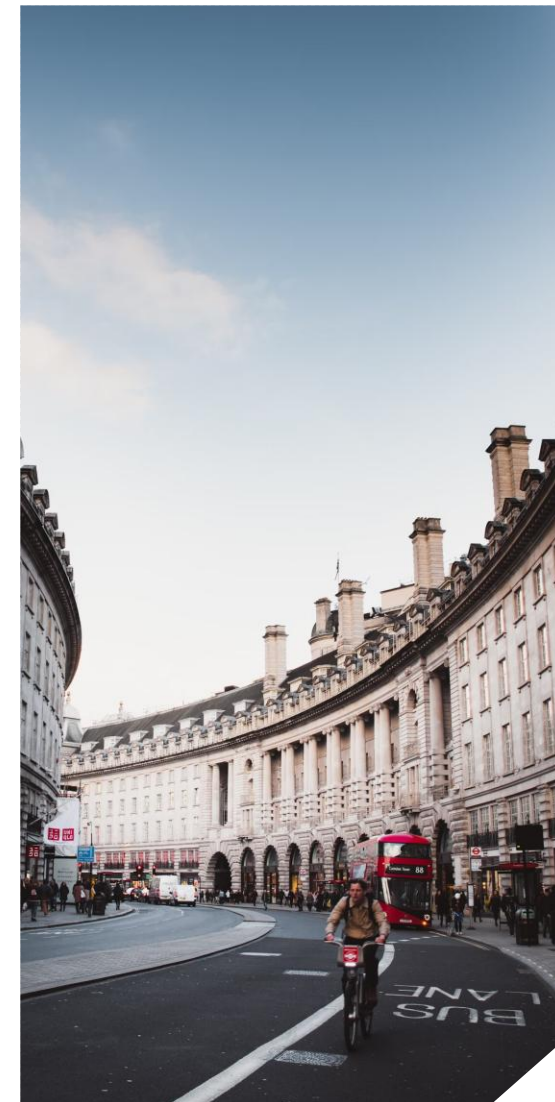
The same proportion (62%) say that the ability to gather loyalty points from airlines and hotels, which they can then use in personal travel, is one of the key benefits of travel for work. This rises to over seven in ten of the most frequent travelers (71%).

### **Are we moving beyond bleisure?**

With bleisure widespread, we see similarly high levels of the opposite – a blending of business into leisure, which could perhaps be called "lusiness".

Half of travelers (52%) say they have mixed work meetings into leisure trips, with this behavior more common among both Gen Z (55%) and Millennials (57%) than it is for Gen X (42%), pointing to an age-based split in the workforce.

This may reflect the "work from anywhere" policies some companies offer. But unmanaged, it may threaten employees' work-life balance, while opening the risk of non-compliance with policies around data protection, insurance and duty of care.



# Making travel more special

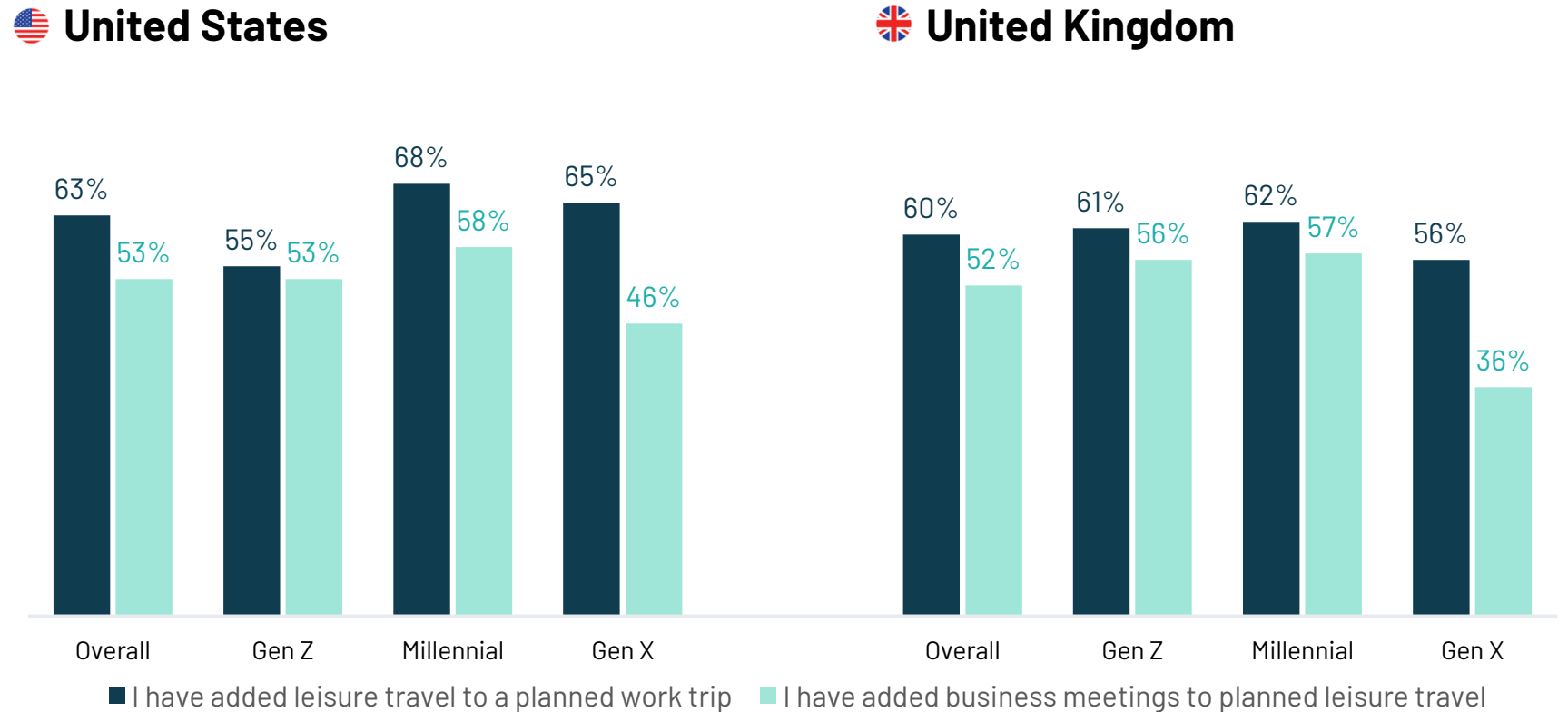
## Mixing leisure with business, and business with leisure

### Another shift in work-life balance

While around six in ten business travelers have taken a bleisure trip, the proportion who have added work meetings to a personal trip is not far behind.

Take up of this second option is higher among younger generations – for both Gen Z, where the level is close to the proportion who have taken a bleisure trip, as well as Millennials. The older Generation X are less likely to have worked from a personal trip.

This effect is driven by age, rather than cohort, with the workforce roughly divided between those over and under 45. This suggests that a more blended future of work is here to stay, along with the attendant risks of burnout.



Question: For each of the following statements, select the extent to which you agree, or disagree with each ... % net agree shown  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 – 25 September 2024  
 Source: Amex GBT x Ipsos



*Blended travel is about retaining good employees who want to work hard... This keeps a good balance with our employees – we care about their personal lives just as much as when they're in the office*

**Martha Ferguson**

Director, Global Head of Travel Services, Lazard & Co

## Will bleisure become a burden for tomorrow's travelers?

### Balancing the benefits and risks of mixing business with leisure

The widespread nature of blended travel – both building personal time into work trips and adding meetings to a vacation – can be seen as a positive trend.

It suggests that employees feel empowered to adopt a more flexible approach to work, which can have positive effects for both the company and the traveler. It may also help with the recruitment and retention of staff, by enhancing job satisfaction and reducing burnout.

Yet there are potential risks to the new combinations of business and leisure we identify among tomorrow's

business travelers.

If employees come to feel pressured to work during their personal trips, this will undermine work-life balance and could shift bleisure from being an exciting perk, to a burdensome task.

Further, this novel blended approach introduces new risks, such as non-compliance with policies related to data protection, insurance, and duty of care.

To maximize the benefits of new bleisure, businesses must strike a careful balance, with new policies that empower employees to enjoy flexibility while mitigating the challenges of a highly mobile workforce.



## Making travel more sustainable

Currently there is a close perception of alignment between the values of business travelers and the values they believe their employer holds.

This is particularly true in climate, where there is an assumption that employers share employees' values in terms of feelings of guilt about travel as well as interest in more accessible and sustainable ways to travel for work.

While the present seems harmonious, how can companies keep close to their employee's values as business travel comes under greater environmental scrutiny?



*We've been measuring and reporting our emissions since 2010. When we started, travel accounted for about 60% of our business's emissions. It's now 80%. This increase isn't because other factors have changed, but because we've invested in reducing emissions from our buildings and other areas.*

*Travel is our last and most difficult challenge.*

**Mark Avery**

Business Services and Travel  
Leader, PwC

## Making travel more **sustainable**

### Alignment in sustainable values for now

#### **Many business travelers feel their values are supported**

The good news for companies is that few business travelers experience a conflict between their employer and their personal values when traveling.

Two thirds (65%) say their employer enables them to stick to their personal values on the road. The most frequent travelers concur more strongly still, with nearly eight in ten agreeing this is the case.

Although six in ten Generation Z members also agree, this is an area of comparative underperformance when it comes to value alignment.

#### **Assumed alignment between employer and employee values**

When it comes to sustainability, travelers' sense of their own values and those of their employer are closely linked: for instance, 44% of business travelers say they feel guilty about the environmental impact of business travel, and 44% also say that this phrase describes their employer.

Among groups who feel more guilty about their travel footprint, assumptions of employer guilt rise too: for instance, among Gen Z, 50% say they feel guilty and 51% say the same about their employer.

#### **Wide interest in sustainable and accessible travel**

This alignment also features in other areas. Six in ten say their employer is more interested in finding ways to travel for work that are more accessible (62%) and environmentally friendly (60%).

Half of (49%) say that their employer is looking to cut back on the number of work trips take to lessen their impact on the environment, including half of the most frequent travelers. And a similar proportion say they are doing the same personally, too. This may be a point of tension between workers and employers in the future.

# Making travel more sustainable

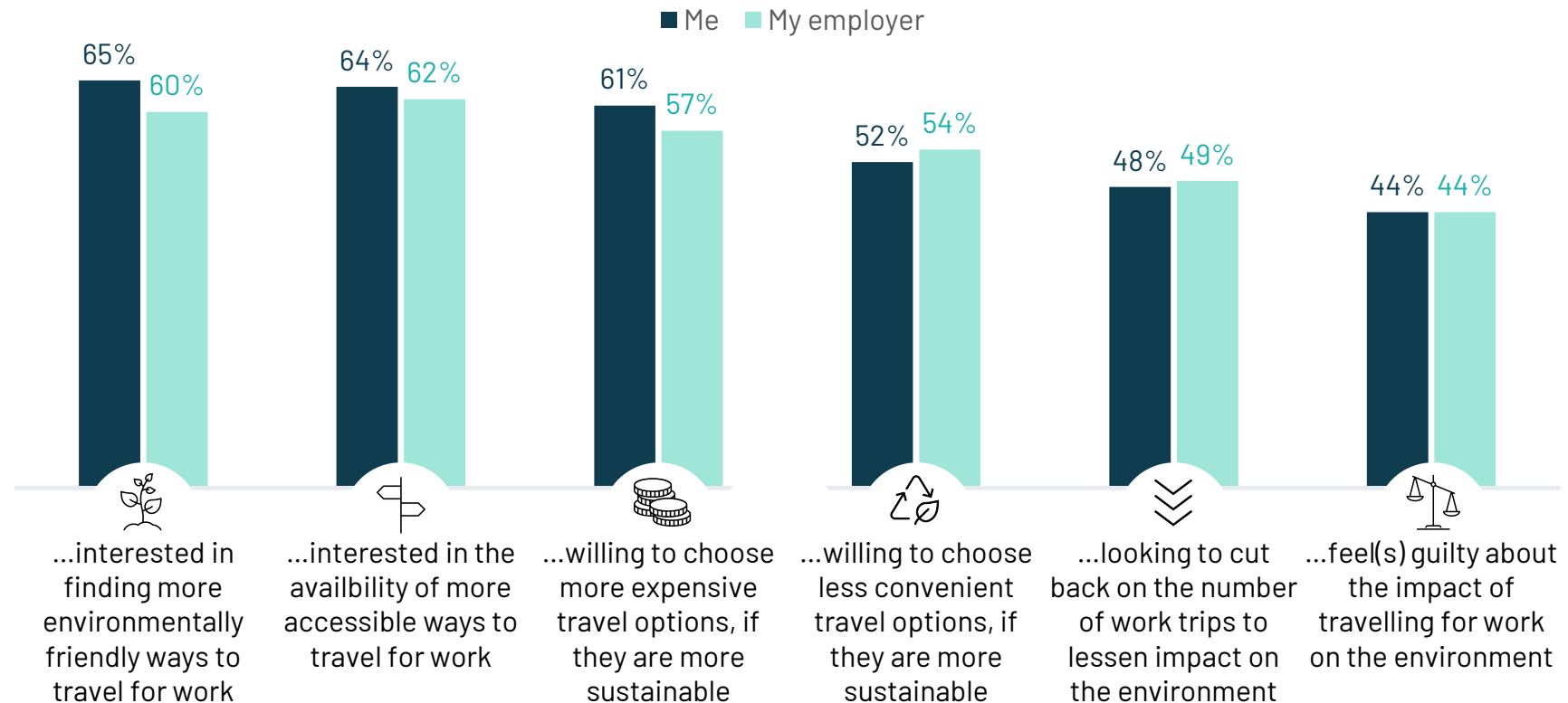
## Bridging the climate say-do gap

### Will behaviors match intentions?

The data shows a reasonably high level of stated interest in more sustainable and accessible methods of travel for work, as well as a commitment to be greener when traveling, even if it is more expensive, or less convenient.

But are these just warm words? The gap between words and deeds is known to be wide when it comes to climate action.<sup>1</sup> And almost six in ten *don't* feel guilty about the impact of their work travel on the planet.

But business travelers clearly expect the same level of commitment from their workplaces – this points to a role for business in bridging the climate action gap.



Question: For each of the following statements, please consider the extent to which you feel this describes... % a great extent/a fair extent shown  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 – 25 September 2024  
 Source: Amex GBT x Ipsos



## How far will the values of tomorrow's travelers diverge?

### **A climate reckoning may test employer-employee agreement**

The comfortable alignment between employers and travelers reflects that neither has so far faced a stern test of their environmental values.

However, the work required to meet existing business climate goals will only increase in the coming years, which may lead to more scrutiny on business travel.

Travelers' commitment to climate action could be challenged by unexpected policy changes and adjustments to travel opportunities.

Some may have already become more environmentally-minded and welcome the chance to reduce their carbon footprint. But others may take a

different view – especially if they are working with markets where in-person work culture remains deeply ingrained and they feel limits on travel mean business opportunities are being lost.

If either employers or employees take greater levels of climate change, the other may not keep up.

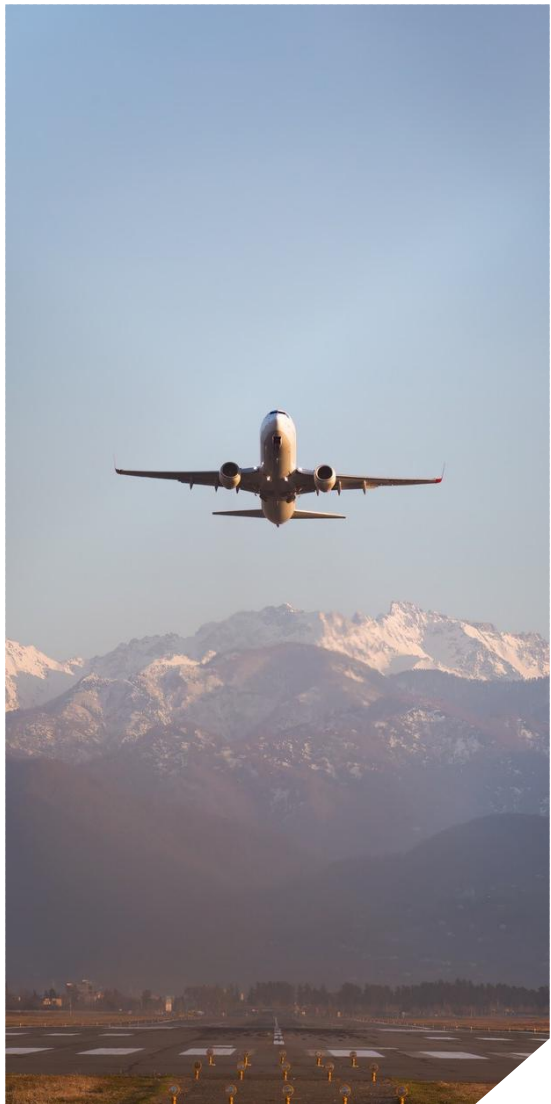
The first challenge in this future is understanding: how can companies keep close to their employee's values as business travel comes under greater scrutiny?

The second is action: how can businesses adapt their travel programs to demonstrate that they are being more environmentally and accessibility-minded?



# CONCLUSIONS

# 05



# Multiple trajectories for the future of business travel

## A prolonged period of turbulence

Business travel sits at the center of a whirlwind of competing forces.

Economic drivers, most notably a sharp increase in costs since the pandemic, have reduced the purchasing power of companies' travel budgets.

Environmental drivers are significant too. Firstly, they are a leading cause of heightened disruption through extreme weather events, which are occurring with increasing regularity.

Secondly, the process of decarbonization is a major catalyst for change, increasing interest in greener methods of travel like rail, while putting pressure on flight and car journeys.

## The purposes of travel are in flux

In the face of these forces, businesses are experimenting and innovating over when face-to-face time is necessary and when it is a "nice to have".

These forces are influencing, and being influenced by, social change: a bottom-up driver of change to the sector.

As we have explored in this report, the views of the emerging Generation Z and the wants and needs of the three workforces – hybrid, remote and location – are changing how business travel is viewed as part of the employee value proposition.

## Brace for further uncertainty

Yet travel remains pivotal to business. In many parts of the world, economic growth is found increasingly overseas. The importance of travel in broadening horizons and cultural boundaries remains as important now as it has been for most of human history.

The tensions between top-down and bottom-up change we see in the landscape of business travel suggest multiple possible futures, with uncertainty likely to continue into the medium term.

To prepare for the future, understanding who tomorrow's business travelers are, and what they need, is becoming more important.



# How best to support tomorrow's business travelers?

## An outline of the future

This report identifies that generational replacement and the hybrid working equilibrium will set the outlines of who the business traveler of the future is.

While Generation Z are currently underwhelmed with travel for work, understanding how far they will adopt the interests and values of older cohorts as they age will help businesses develop policies to help them fall in love with business travel.

The balance of hybrid, location and remote working is likely to continue to ebb and flow over time. Recognizing that these workforces have distinct needs from business travel will again help businesses to prepare.

## Meeting the needs of tomorrow's business travelers

New survey data revealed in this report points to areas of need that may become more important in a more disrupted and changeable future: greater reassurance and protection; more effective blending of technology and human assistance; better understanding of the gap between employees' values and behavior; and vigilance and support when it comes to the blending of work and life.

The challenge to the business travel industry is to provide answers to these needs that will make travel more safe, secure, special, and sustainable. Amex GBT provide some first steps overleaf.

# Steps to meet the needs of tomorrow's travelers

## Making business travel more **sustainable**

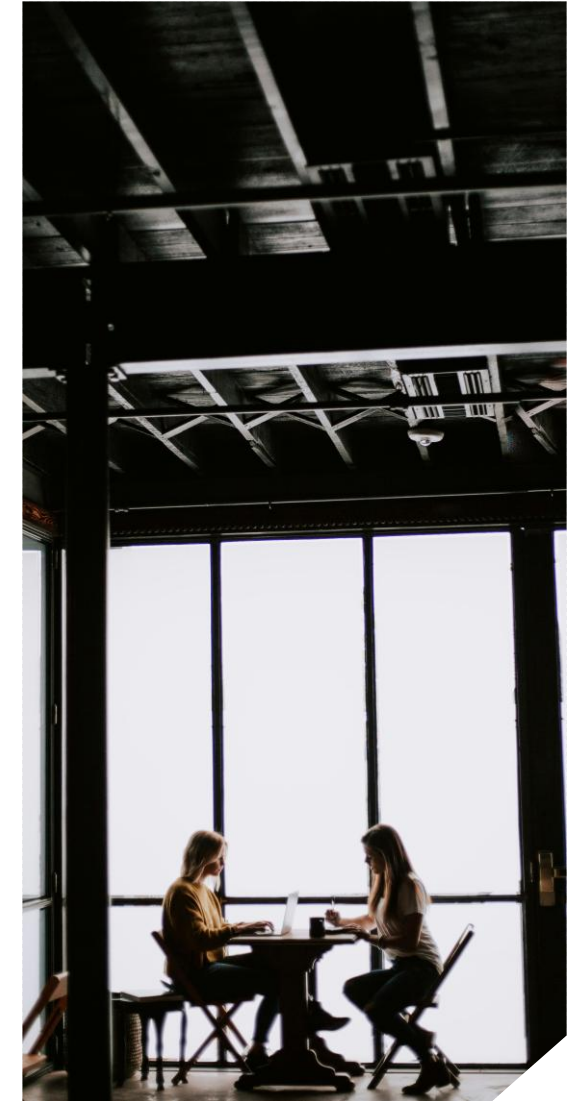
### **Better, more responsive, experiences for a diverse traveler base**

- Recognising that the business traveler of the future will be more diverse – professionally as well as personally – means rethinking what experiences will be most important to them.
- With an understanding what traveler need looks like in 2025, companies can work closely with their partners to secure the most relevant packages and perks for their employees, making business trips smoother, more flexible, and enjoyable, while also generating excitement for the journey.

## Making business travel more **secure**

### **Business travel advice tailored to Gen Z's disrupted workplace experience**

- It is often easy to forget that many in Generation Z have not been working long enough to know what working life was like before the pandemic.
- While travel is a key part of their education, providing practical guidance for face-to-face meetings, networking, and understanding business etiquette may help them feel prepared and confident.
- Any new guidance needs to speak to Gen Z's needs and consider new communication and learning methods that will connect most effectively with this generation





# Steps to meet the needs of tomorrow's travelers

## Making business travel more **seamless**

### **Balancing human and technology in travel support**

- The likely productivity gains from further incorporation of generative AI means that this technology will have a big role to play in travel support – it is also an area of key interest for many of tomorrow's business travelers.
- But there are big risks in moving too far, or too fast. The personal touch remains very important, especially in the face of travel disruptions.
- There will always be demand for empathetic human support; finding a way to improve the efficiency of agents, rather than replacing them with digital tools, may be the right first step.

## Making business travel more **special**

### **Building re-enchantment with travel**

- Travel remains an attractive proposition for many. The continued rise of bleisure points to the desire to fit work travel around employees' personal lives.
- To continue to build excitement and appreciation for business travel, companies could focus on creating new programs that build on the fact that introducing elements of leisure can enhance the business travel experience.
- This might include organizing guided tours to experience local destinations, joining local networking events, or other activities that go beyond the typical business trip. This will require greater flexibility in travel schedules, but it may reignite employee passion for travel for work.

# METHODOLOGICAL APPENDIX AND REFERENCES

# 06

# Business travel survey and methodology details

## Survey technical details

Ipsos UK conducted online surveys of 817 business travelers resident in the UK and 1,000 business travelers resident in the US, between 20 and 25 September 2024.

A business traveler was defined as someone who has taken a flight for business purposes at least once in the past two years, or expects to take at least one flight for business purposes in the coming twelve months.

The online sample from which the business traveler sample was recruited is representative of the wider UK population aged 16–75, and the wider US

population aged 18–75, using quotas on age, gender, region and working status.

As the make-up of the business traveler universe is unknown in both countries, the data is presented unweighted. Comparisons between groups should be considered as an indicative read on the views of the wider population.

## Amex GBT transaction data

Amex GBT internal data is used at points in this report.

These are referenced in the subsequent section but remain proprietary information of Amex GBT.

## Reporting conventions

Where percentages are given without explicit reference to an audience type, they refer to the overall score across the UK and US surveys.

The report identifies generations as an important lens for the business traveler of the future. The definitions we used for each are detailed below:

- Generation X – aged 45 – 58
- Millennials – aged 29 – 44
- Generation Z – aged 28 and under

The Baby Boomer generation (aged 58–78) is not examined due to a small base size for this cohort.

The report also examines the views of remote, hybrid and location workers, who are defined as:

- Remote workers – usually work from home 5 days or more a week
- Hybrid workers – usually work from home between 4 and 1 day per week
- Location workers – usually work away from home every day

Another group examined are “frequent travelers”. This group is identified as those who have taken more than 11 flights for work in the past two years.

# References

## Page 5

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<https://experience.amexglobalbusinesstravel.com/hbr/2024/>

## Page 10

1. Deloitte:  
<https://www2.deloitte.com/us/en/insights/focus/transportation/corporate-business-travel-survey-2024.html>
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1. Amex GBT proprietary data on After Hours Servicing call volumes.

2. Climate Action Tracker:

UK:  
<https://climateactiontracker.org/countries/uk/>

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<https://climateactiontracker.org/countries/usa/>

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1. Amex GBT proprietary data.

## Page 27

1. Ipsos:  
<https://www.ipsos.com/en/perils>

## Page 33

1. Amex GBT proprietary air booking data for FY 2023 and 2024 to August.

## Page 39

1. Ipsos: <https://www.ipsos.com/en-uk/addressing-sustainability-say-do-gap>

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# Appendix table: Confidence in generative AI business travel management

<i>% very/fairly comfortable</i>	<b>Generation Z (age 28 and under)</b>	<b>Millennials (age 29-44)</b>	<b>Generation X (age 45-58)</b>
Completing expense reports	53%	67%	57%
Booking your plane travel	60%	66%	55%
Booking your hotel	60%	67%	61%
Booking your last mile travel such as taxis and trains	58%	61%	57%
Rebooking your flight if it is canceled	55%	61%	56%
Sorting out visas and government travel forms	49%	58%	47%
Choosing and booking a restaurant for you	58%	70%	58%

Question: Thinking about travelling for work, how comfortable or uncomfortable would you be with the use of generative AI in the following tasks? % very/fairly comfortable shown  
 Base: 817 UK adults and 1,000 US adults in employment who have flown for work in the past two years, or intend to do so in the next year, interviewed online 20 - 25 September 2024  
 Source: Amex GBT x Ipsos

# MEET TOMORROW'S BUSINESS TRAVELERS

Who is shaping the future of  
business travel?

March 2025