



# Travel Smart

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

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November 2022 [updated June 2023]

## Summary

The COVID-19 pandemic caused unprecedented disruptions in global business travel. With the world having emerged 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 during 6-10 October 2022, of the opinions of corporate employees and business travelers in a representative sample of 2,506 respondents across France, Germany, Spain, the United Kingdom (UK), and the United States (U.S.). A complementary survey conducted by Ipsos was commissioned during 12-18 April 2023 in a representative sample of 1,500 adults across Belgium, Poland and Switzerland.

## Survey October 2022

The results in France, Germany, Spain, the UK and the U.S. in October 2022 showed 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.

Survey April 2023<sup>1</sup>

Likewise, the complementary poll in April 2023 in Belgium, Poland and Switzerland confirms the results regarding expectations by employees and business travelers for corporate travel within their companies:

1. **A majority of employees in Belgium, Poland and Switzerland want their company to set targets to reduce flying.** 70% of employees in the three countries believe companies play an important role in the fight against climate change, including setting travel targets and policies to reduce corporate flying. 71% of employees believe that reducing the number of corporate flights is a key factor in reducing a company's carbon footprint. A majority of respondents also call for companies and business leaders to set targets in this regard.
2. **A majority of employees believe they themselves play an important role in changing their company's travel policy.** This is the case for 86% of Swiss employees, and around two-thirds of Polish (67%) and Belgian (62%) employees.
3. **A majority of business travelers in the three countries are ready to take steps to reduce the impacts of their travel.** These steps include using fewer business flights for internal meetings (56%), planning more local versus global meetings (58%) or using a more environmentally friendly mode of transport (55%).

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.

<sup>1</sup> Updated June 2023

## 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.<sup>2</sup>

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.<sup>3</sup>

As the world has emerged from the pandemic, businesses are now at a crossroads. While international business travel remained at 54% of pre-pandemic levels in 2022, domestic travel was back to 67%.<sup>4</sup> At the same time, millions of workers have planned to switch jobs in pursuit of better work-life balance.<sup>5</sup> 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?

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. The campaign 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.

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<sup>2</sup> International Air Transport Association [press release](#), 25 January 2022.

<sup>3</sup> YouGov [poll](#) commissioned by the European Climate Foundation, April 2021.

<sup>4</sup> Global Business Travel Association, Business Travel Outlook [Poll](#), Q1 2023.

<sup>5</sup> Forbes, [Millions of Workers Plan to Switch Jobs in Pursuit of a Work-Life Balance](#), 23 June 2021.

## 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.

A complementary survey conducted by Ipsos was subsequently commissioned:

- Fieldwork was undertaken between 12-18 April 2023.
- The total sample size was 1,500 adults across Belgium, Poland and Switzerland. To qualify for the survey, respondents had to be employed full-time at an organization with at least 50 employees.
- The sample size included 786 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.<sup>6</sup>

### 3.1 Nearly three quarters of employees want their company to set targets to reduce flying<sup>7</sup>

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 in the 5 surveyed countries 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%

- The survey conducted in Belgium, Poland and Switzerland in 2023 also shows that seven in ten of full-time employees believe businesses must play an important role in fighting climate change, including setting targets and travel policies to reduce levels of corporate flying:

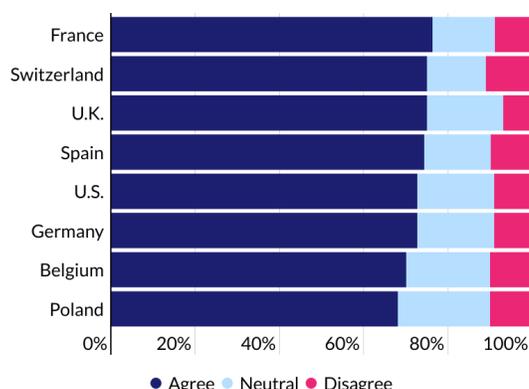
A business has an important role to play in the fight against climate change	Total	Belgium	Poland	Switzerland
A business has an important role to play in the fight against climate change	71%	69%	70%	73%
An important factor for reducing a business’s carbon footprint is reducing levels of corporate flying	71%	70%	68%	75%
To reduce levels of corporate flying, a business must set targets and include travel policies	72%	70%	70%	75%

<sup>6</sup> Morning Consult, The State of Travel & Hospitality [report](#), H2 2022.

<sup>7</sup> Updated June 2023

Employee survey

**An important factor for reducing a business’s carbon footprint is reducing levels of corporate flying**



Source: Travel Smart Topline  
 \*Poll in France, Germany, Spain, UK, and US conducted in October 2022  
 Poll in Belgium, Poland, and Switzerland conducted in April 2023

- 62% of business travelers surveyed in the 5 countries 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%

- In the second phase of the survey, 58% of business travelers in Belgium, Poland and Switzerland are flying at least somewhat less than they used to before the start of the pandemic. Moreover, the trend continues and more than half (56%) never travel for work.<sup>8</sup>

Base: Business Travelers	Total	Belgium	Poland	Switzerland
I have stopped flying for business altogether	18%	33%	16%	12%
I fly for business much less than as I used to	20%	16%	18%	23%
I fly for business somewhat less than I used to	20%	13%	20%	24%

<sup>8</sup> Updated June 2023

Base: All Respondents	Total	Belgium	Poland	Switzerland
Never travel for work	56%	71%	64%	34%

### 3.2 A majority of business travelers are ready to take steps to reduce the impacts of their travel<sup>9</sup>

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 two thirds of business travelers are completely or very willing to take fewer flights for internal meetings, or plan more local meetings than global. Almost one fifth are completely or very willing to prioritise travel according to a carbon budget (59%), or making each trip a longer stay (58%).

Base: Business Travelers	Total	U.S.	U.K.	France	Germany	Spain
Taking fewer business flights for internal meeting	72%	76%	68%	62%	76%	71%
Planning more local meetings than global meetings	67%	70%	68%	59%	67%	69%
Prioritising travel according to a carbon budget through setting a cap on total allowable carbon	59%	63%	56%	54%	55%	66%
Making each trip a longer stay	58%	66%	56%	51%	57%	57%

- Likewise, almost three fifths of business travelers in Belgium, Poland and Switzerland are completely or very willing to take fewer flights for internal meetings, or plan more local than global meetings.

Base: Business Travelers	Total	Belgium	Poland	Switzerland
Taking fewer business flights for internal meeting	56%	60%	48%	59%
Planning more local meetings than global meetings	58%	57%	50%	63%
Using a more environmentally friendly mode of transportation <sup>10</sup>	55%	55%	46%	60%
Making each trip a longer stay	49%	48%	42%	54%

<sup>9</sup> Updated June 2023

<sup>10</sup> This answer to this multiple choice question was updated for this second phase of the survey. This was the only response which differed from the first phase.

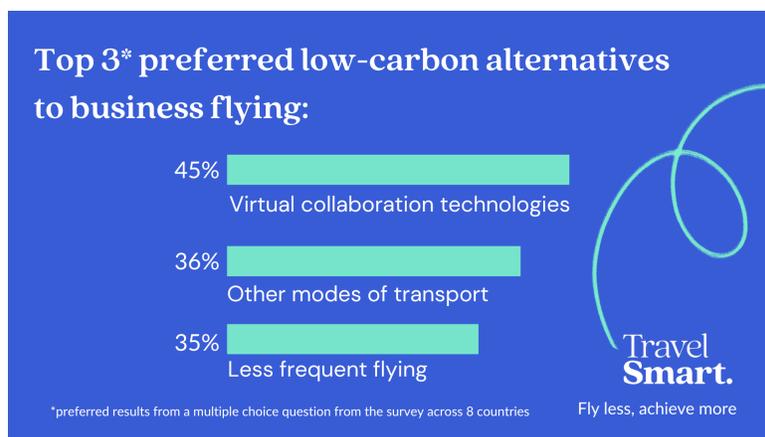
- Among expanded choices in low-carbon alternatives to reduce flying, over half of travelers responding to the first phase of the survey preferred virtual collaboration technologies, and one third less frequent flying and opting for other modes of transport.

Base: All Respondents	Total	U.S.	U.K.	France	Germany	Spain
Use virtual collaboration technologies (e.g., Zoom, Microsoft Teams)	46%	57%	55%	35%	40%	43%
Reduce frequent flying	33%	30%	29%	28%	45%	32%
Switch to another means of transport	32%	28%	30%	38%	36%	30%
Purchase Sustainable Aviation Fuels (SAF)	17%	17%	17%	7%	20%	22%
Offset emissions on your flights	16%	15%	15%	16%	16%	22%
Other	6%	5%	7%	8%	5%	3%

- In the second phase of the survey, using virtual collaboration technologies continue to be the most preferred alternative options for travelers in both Belgium and Switzerland, followed by switching to other means of transport and reducing frequent flying. Polish travelers slightly prioritise switching to other means of transport (46%) over using virtual collaboration technologies (43%).

Base: All Respondents	Belgium	Poland	Switzerland
Switch to another means of transport	38%	46%	43%
Use virtual collaboration technologies (e.g., Zoom, Microsoft Teams)	43%	43%	48%
Reduce frequent flying	32%	41%	43%
Purchase Sustainable Aviation Fuels (SAF)	16%	16%	26%
Offset emissions on your flights	12%	15%	26%
Other	8%	5%	3%

- Considering respondents in both first and second phases of the survey, virtual collaboration is the top preferred option across the 8 countries surveyed



### 3.3 Over half of travelers reported good impacts on their work-life balance, productivity and health from reduced travel, with this perception lessening in the second phase of the survey<sup>11</sup>

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%

- In the survey conducted 6 months later in Belgium, Poland and Switzerland; the impact of the reduction of corporate travel is perceived by travelers to be somewhat less. The work-life balance (41%) and the motivation (40%) continue to be perceived as the most impacted.

Base: Business Travelers	Total	Belgium	Poland	Switzerland
Work-life balance	41%	36%	47%	41%
Productivity levels	34%	30%	44%	31%
Health	37%	28%	47%	37%
Motivation	39%	33%	50%	36%

- 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%

<sup>11</sup> Updated June 2023

- In the poll conducted in Belgium, Poland and Switzerland in 2023, a different set of possible answers was offered. A strong majority (73%) of employees believe that better international rail connections will have at least some influence on the company’s decision to reduce the amount of flights its employees take for work. Two-thirds believe that less expensive sustainable travel options and more investments in virtual collaboration technologies will influence the company's decisions on flying.<sup>12</sup>

Base: All Respondents	Total	Belgium	Poland	Switzerland
More investments in virtual collaboration technologies	69%	66%	70%	71%
Sustainable travel options are less expensive	69%	67%	70%	71%
Better international rail connections	73%	71%	74%	73%
Companies need to report about the emissions related to their business travels	66%	58%	66%	73%
Clear targets for sustainable business travel for large companies	67%	61%	70%	70%

### 3.6 Conclusions<sup>13</sup>

Overall, the results from both phases of the survey conducted in 2022 and 2023 indicate that there is strong support by employees for their companies to establish targets to reduce corporate flying, to shift to low-carbon alternatives to reduce environmental impacts, and to redefine more purposeful travel to avoid unnecessary trips and minimize high-emissions long-haul flying. Among those employees who were business travelers before the pandemic, an average of over 60% of business travelers across the 8 countries are already flying at least somewhat less than they used to before the start of the pandemic. As for the preferred low carbon alternatives to flying, using virtual collaboration technologies continue to be the preferred option for business travelers in most countries. Across countries, expanded choices in low carbon alternatives are available to drive the changes in business travel that employees are seeking.

<sup>12</sup> Updated June 2023

<sup>13</sup> Updated June 2023

## 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 business air travel emissions reduction targets are required in national emissions reduction plans, corporate climate plans and 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 during the pandemic, and align with employees' expectations.

## Further information

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