

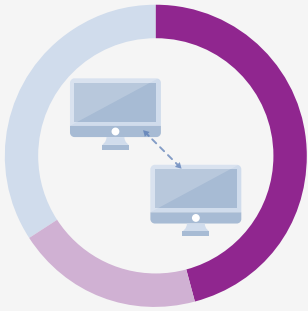


## The Evolution of Corporate Travel Content



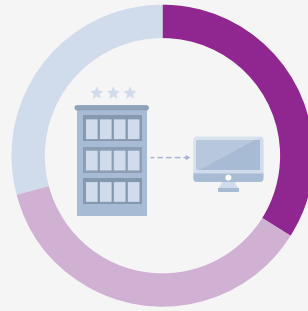
## TECHNOLOGY AND CONTENT INCORPORATION

More than ever before, travel managers are looking to incorporate technology that integrates direct bookings with their managed travel program.



**46%** of travel managers say direct connect bookings are currently incorporated into their managed travel program

**20%** say they expect to incorporate direct connect bookings within the year




**34%** of travel managers currently have integration between supplier direct bookings and their travel program


**37%** plan to have this type of integration within the next year




**12%** of travel managers say NDC bookings are currently part of their managed travel program

**46%** say they plan to incorporate NDC bookings into their program within the next year

 Part of travel managers' managed programs today

 Not part of programs today, but expect to be implemented within the next year

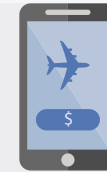
 Not part of programs today and don't expect to be implemented within the next year

## EXPECTED CHANGES IN BOOKING CHANNELS

Even though they plan to incorporate technology that captures direct bookings, many travel managers say they expect direct bookings to decrease



of travel managers say in the next three years, bookings made through their **corporate online booking tool** will **increase**



**40%**

say **direct** bookings on **airline websites** will **decrease** in the next three years



**38%**

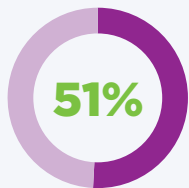
expect direct bookings on **hotel websites** to **decrease** in the next three years

## REACTING TO CHANGING FEE STRUCTURES

Many travel managers plan to avoid increased airline fees for bookings made via TMC/GDS connections

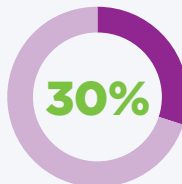


**Four in five** travel managers say they would try to avoid fees



would attempt to negotiate with the airlines to eliminate fees

would seek alternative sources without fees



## EXPECTATION VS. ACTION

Despite confidence in OBT bookings, most travel managers only make OBT configuration changes on an as-needed basis

**87%** of travel managers say they are at least partly responsible for making necessary configuration changes to their OBT

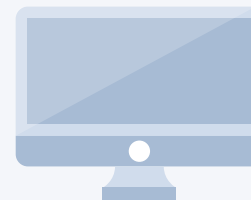


**30%**

say the travel manager/travel department is fully responsible for making changes

**57%**

say their TMC is responsible for making changes, but only with explicit direction from the travel manager/travel department



**However**

**53%** of travel managers say they only review their OBT configuration settings on an **as-needed basis**, such as when there are traveler complaints that require review or when changes to suppliers or policies are made



## ABOUT GBTA

The Global Business Travel Association (GBTA) is the world's premier business travel and meetings trade organization headquartered in the Washington, D.C. area with operations on six continents. GBTA's 9,000-plus members manage more than \$345 billion of global business travel and meetings expenditures annually. GBTA delivers world-class education, events, research, advocacy and media to a growing global network of more than 28,000 travel professionals and 125,000 active contacts. To learn how business travel drives lasting business growth, visit [gbta.org](http://gbta.org)

## ABOUT SAP CONCUR

SAP® Concur® is the world's leading provider of integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes. With SAP Concur, a top-rated app guides employees through every trip, charges are effortlessly populated into expense reports, and invoice approvals are automated. By integrating near real-time data and using AI to audit 100% of transactions, businesses can see exactly what they're spending without worrying about blind spots in the budget. SAP Concur eliminates yesterday's tedious tasks, makes today's work easier, and helps businesses run at their best every day. Learn more at [concur.com](http://concur.com) or the SAP Concur blog.

## METHODOLOGY

- An online survey was conducted of corporate travel managers. The survey fielded between July 1 and July 8, 2019. An email invitation was sent to 1,689 GBTA members. Two hundred and thirty completed at least one question for a response rate of 14%. Of these, 226 qualified given they:
  - Are a travel manager/buyer or a procurement/sourcing specialist
  - Use a travel management company (TMC) for any product or service, or are a certified Corporate Travel Department (CTD)
- Of those who qualified, 197 completed the entire survey