

# Lost in Translation

Changing Landscape, Familiar Challenges



*IN PARTNERSHIP WITH*

**SAP Concur**



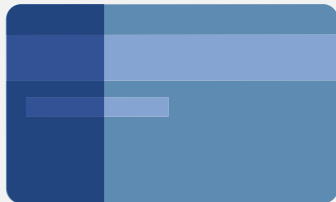
# The Travel Manager's Role Broadens- Yet Familiar Tasks Still Consume a Large Amount of Time

Compared to 5 Years Ago, How Much Time do you Spend on the Following Today?

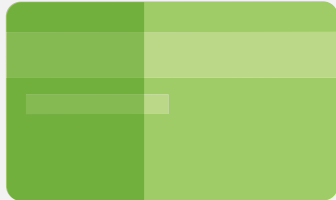
■ Less Time    ■ Same Amount of Time    ■ More Time

Managing Corporate Cards and Payment

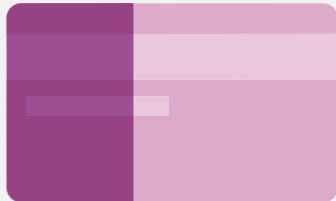
24%



39%



37%



Data Analysis & Reporting



Evaluating or Implementing New Technology



Traveler Safety and Duty of Care



Cross-Department Meetings or Collaboration



Working with TMCs

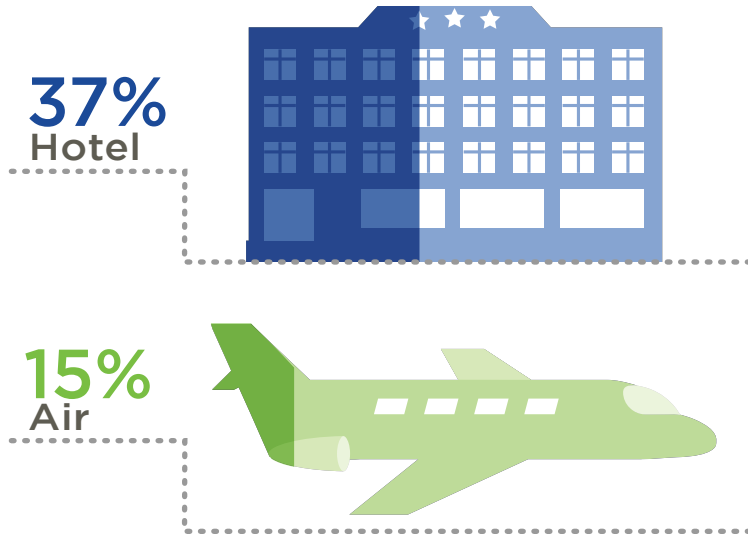


Communicating with Travelers or Addressing Their Concerns



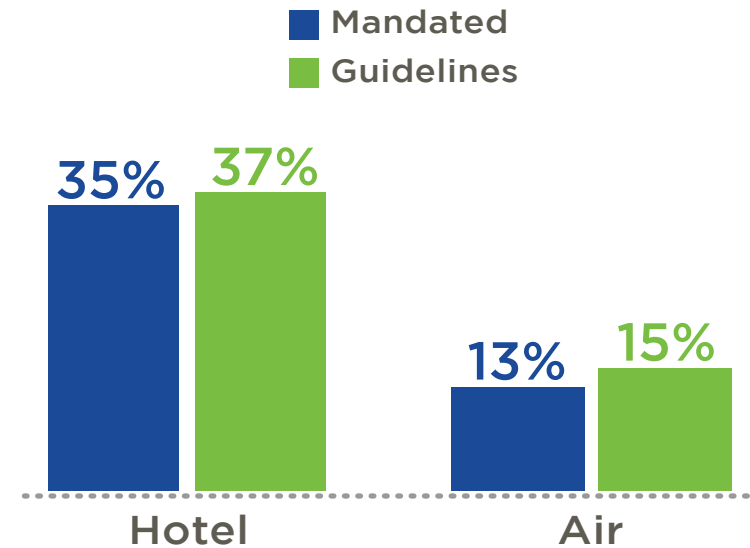
# Invisible Spend Remains a Problem

On Average, **37%** of Hotel Bookings are Made Outside of Corporate Channels



Average Leakage is Similar Between Companies with Strict and Flexible Travel Policies

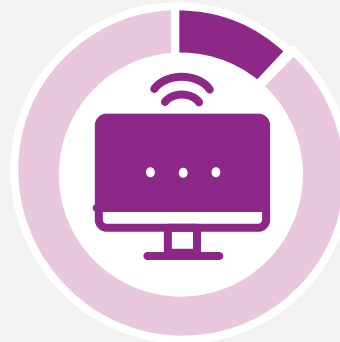
-by travel policy type



## How do Companies Capture Invisible Spend?



**20%** use technology to capture outside bookings

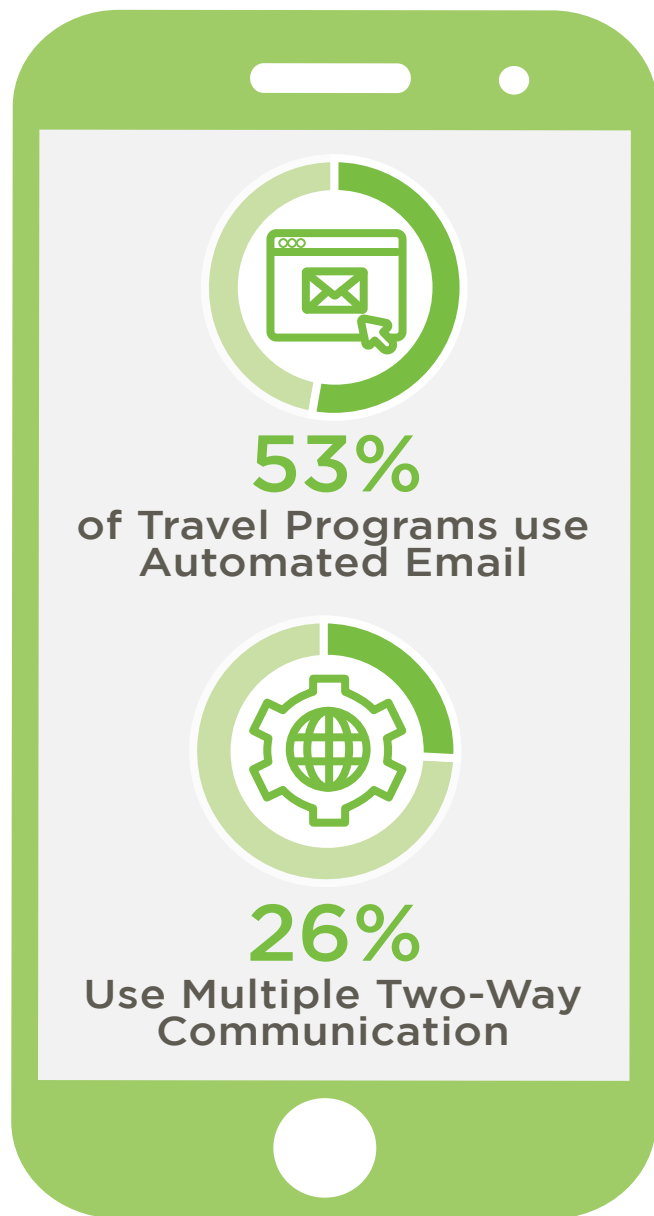


**14%** use a tool that enables suppliers to automatically send direct reservations to TMCs



**19%** use a tool that applies their policy and ensures negotiated rates are honored when travelers book outside of their tool

# Traveler Safety is a Growing Priority- But Some Loopholes Remain



**51%** of Travel Programs Use an  
Integrated Travel and Expense Tool  
*(compared to 47% last year)*



**27%** of Travel Programs Have  
an Integrated Booking, Expense,  
and Safety Tool  
*(compared to 21% last year)*

**34%** of Travel Managers do not  
Know How Long it Would Take to  
Confirm Every Employee's Safety  
in an Emergency Situation  
*(compared to 29% last year)*



# Travel Managers Value Having Control of the Booking Content They Display

## How Important is...?

- Less Important
- Very Important

Being Able to Label Preferred and Non-Preferred Suppliers



Having Control of the Order in Which Hotel Options are Presented to Their Travelers



Having Control Over the Hotel Rates that are Displayed to Travelers



**44%** of Travel Managers say their OBT Promotes Their TMC's Preferred Suppliers

# Methodology

- An online survey was conducted of U.S.-based Travel Managers who are GBTA members
- Survey fielded between May 31, 2018 and June 10, 2018
- An e-mail invitation was sent to 1,719 GBTA buyers in the U.S.
- 174 recipients completed at least one question, a response rate of 10%
- Of these, 143 qualified, given:
  - They are buyers or procurement professionals
  - Their organization uses a travel management company (TMC) for any product or service
- Of those that qualified, 116 completed the entire survey
- In addition, semi-structured interviews were conducted with a non-random sample of seven business travelers. Interview quotes are presented throughout the report



## About GBTA

The Global Business Travel Association (GBTA) is the world's largest professional association representing the \$1.4 trillion business travel industry. Our global membership includes 9,000-plus business travel professionals from every continent. Collectively, our members directly control more than \$345 billion of global business travel and meetings expenditures annually, and also represent every facet of the global travel industry marketplace.

SAP Concur



## About CONCUR

SAP® Concur® solutions simplify expense, travel, and invoice management for greater visibility and control. For more than 20 years, these leading, innovative solutions have kept customers a step ahead by delivering time-saving tools, connected spending data, and a dynamic ecosystem of diverse partners and apps. User-friendly and business-ready, SAP Concur solutions unlock powerful insights that help businesses reduce complexity and see spending clearly, so they can manage it proactively.