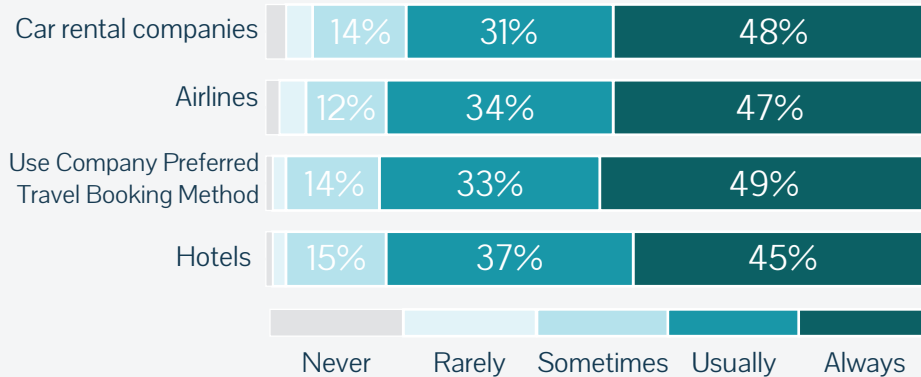


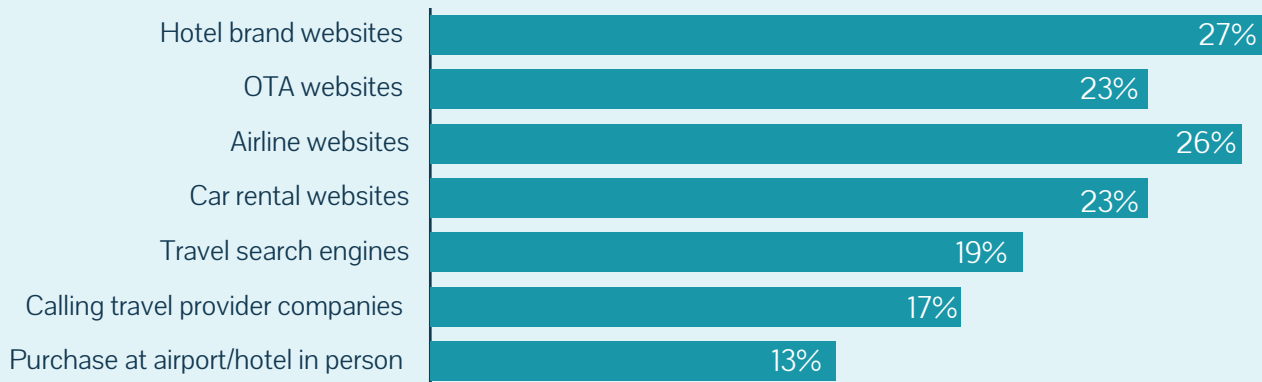
INVISIBLE SPEND



HOW MANY BOOK OUTSIDE OF POLICY?



WHERE ARE THEY BOOKING WHEN THEY GO OUTSIDE OF POLICY?



WHAT PROBLEMS DOES THIS CAUSE FOR MANAGED TRAVEL PROGRAMS?

Duty of Care

Supplier Leverage

Compliance

62%

Expect the corporate tool will capture reservations even if made outside of the company tool

23%

Believe that the company's duty of care tools will work even if they didn't use the booking method recommended by the company

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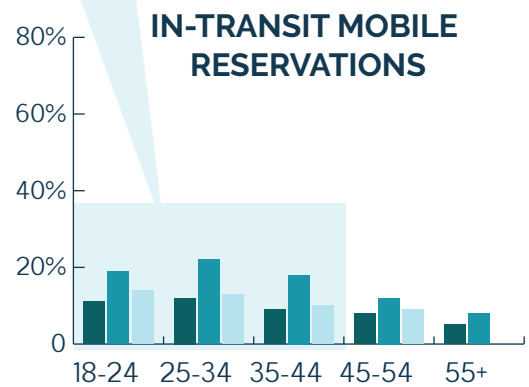
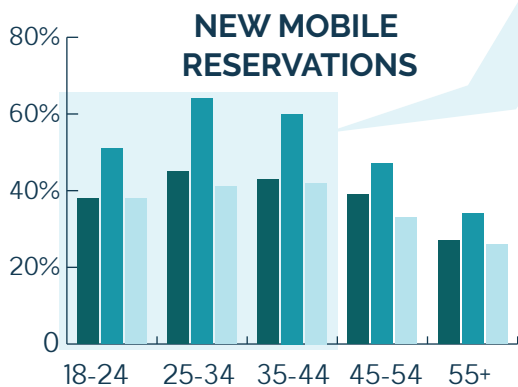
MILLENNIALS ARE CHANGING MANAGED TRAVEL



With the changing workforce and the adoption of smartphones, the **old ways of managing travel are no longer sufficient.**

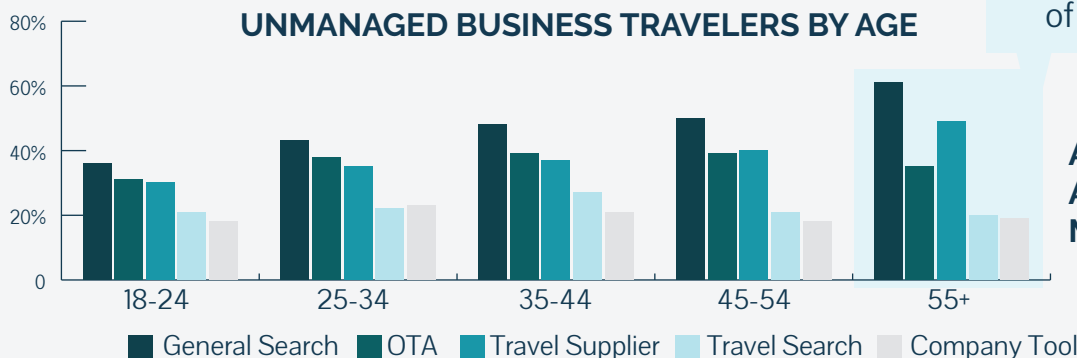
MILLENNIALS AND GEN X

have highest levels of new and in-transit mobile reservations



Across generations, general search, OTAs and travel search are more popular than the company's mobile booking tool

MOBILE SITES/APPS USED BY MANAGED AND UNMANAGED BUSINESS TRAVELERS BY AGE



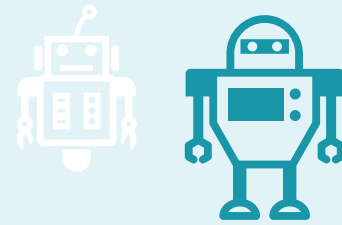
55+ have the highest use of travel supplier sites

ALL AGE GROUPS ARE EMBRACING MOBILE TECHNOLOGY

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BUSINESS TRAVELER EXPECTATIONS OF CORPORATE PLANNING/BOOKING TOOL

Traveler expectations are high, and new technology such as **AI/machine learning** and **chatbots** will increase their expectations



HOW DOES YOUR CORPORATE TRAVEL MOBILE TOOL STACK UP AGAINST TRAVELERS' EXPECTATIONS?

77%

expect the tool to easily help change plans when needed

58%

expect the tool to capture reservations even if made outside of the company tool

16%

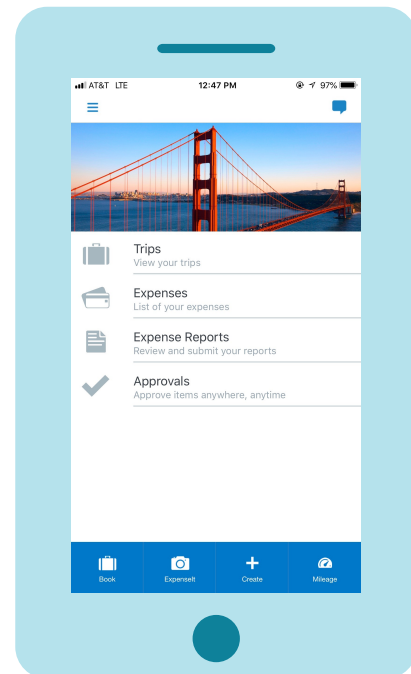
want to chat with their travel agent

19%

want to chat with customer service

64%

expect the tool to know their preferences and automatically make recommendations that fit their needs



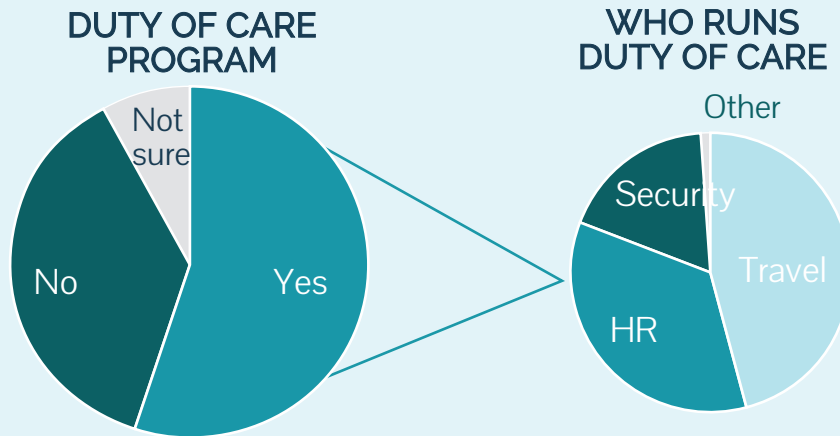
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DUTY OF CARE

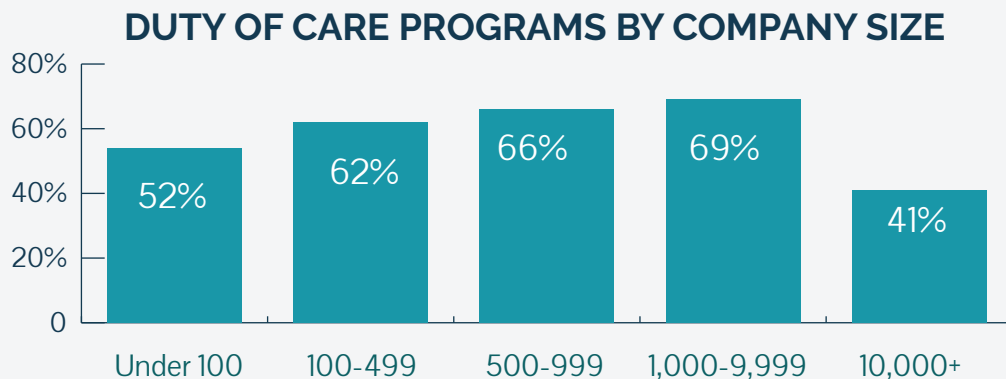
55% OF MANAGED AND UNMANAGED COMPANIES HAVE DUTY OF CARE PROGRAMS

46% DUTY OF CARE RUN BY TRAVEL DEPARTMENT



Travel departments rely heavily on their TMCs for duty of care employee tracking. With more than ½ of managed business travelers having made at least one new hotel reservation on mobile, invisible spend can impact the accuracy of TMC duty of care reporting.

41% OF MANAGED AND UNMANAGED COMPANIES WITH 10,000+ EMPLOYEES HAVE DUTY OF CARE



72% OF MANAGED TRAVEL COMPANIES HAVE DUTY OF CARE



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