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Introduction

In an ever-changing landscape, managed corporate travel programs continue to deliver significant value. Today, many programs have an impact beyond travel, helping companies manage risk, improve employee satisfaction and retention, ensure employee safety, and deliver on critical business objectives.

This study examines the changing world of travel management. It is based on a survey of U.S.-based corporate Travel Managers, and addresses several key questions:

1. **The Travel Manager’s role:** What are the key priorities of Travel Managers today? Compared to five years ago, what do they focus on more today? What do they focus on less? Which technology innovations are Travel Managers most excited about? How will these help them achieve their priorities?

2. **Policy compliance and invisible spend:** Are travel policies more flexible today, or stricter? How often are bookings made outside of corporate channels? How do companies capture these bookings?

3. **Traveler well-being and safety:** Are companies more traveler focused today? Do they spend more time addressing traveler concerns? How do travel programs address duty of care? How do they track and communicate with travelers in an emergency? Do these processes differ by company size?

4. **Content distribution:** Do Travel Managers value having control over the booking options shown to their travelers? How do they feel about promoting their travel management company’s (TMC) preferred suppliers? In which circumstances would they allow it?

While examining several topics, the study emphasizes two general themes:

1. **New boundaries:** The priorities and responsibilities of Travel Managers have broadened over time. While they are more focused on technology, duty of care, and traveler employee satisfaction, they still have work to do in these areas.

2. **Familiar challenges:** Even as travel management broadens, familiar challenges remain. Travel Managers still struggle to capture bookings made outside of corporate channels. In addition, many do not know how long it would take to confirm every employee’s safety in an emergency.
Methodology

An online survey was conducted of U.S.-based Travel Managers who are GBTA members. Fielding took place between May 31, 2018, and June 10, 2018.

An email invitation was sent to 1,719 buyers in the U.S. One hundred and seventy-four recipients answered at least one question, for a response rate of 10%. Of these, 143 were eligible to take the survey based on the following requirements: (1) they are buyers or procurement professionals and (2) their organization uses a travel management company (TMC) for any product or service. Of those who qualified, 116 completed the entire survey.

In addition, semi-structured interviews were conducted with a non-random sample of seven business travelers. Interview quotes and anecdotes are presented throughout the report. Finally, results are occasionally compared to a similar GBTA survey conducted in 2017, also in partnership with SAP Concur.
Key Findings

- **The Travel Manager’s role:** The Travel Manager’s role broadens – yet familiar tasks consume a lot of time. Compared to five years ago, experienced Travel Managers spend more time on data/analysis reporting, evaluating or implementing new technology, and traveler safety/duty of care. However, they still spend significant time on familiar tasks such as managing cards/payment.

- **Technology innovation:** Data integration is not widespread. Only half of travel programs use an integrated travel and expense tool. This can simplify tasks such as expense reconciliation and approval. **Even fewer use an integrated travel, expense, and safety tool.** Integration gives companies greater visibility before expense reports are submitted and reconciliation occurs. This allows them to use expense data in real-time for traveler tracking and assistance.

  Travel Managers are excited about different booking innovations. These include a more consumer-friendly booking experience, personalized booking, and live online chat.

- **Policy compliance and invisible spend:** Invisible spend remains a challenge – and not only when companies have flexible policies. On average, almost two out of five hotel bookings are made outside of corporate channels. The average is similar between programs with strict “mandated” travel policies and those with flexible policy “guidelines.”

  Travel programs may have difficulty capturing invisible spend. Four out of five (80%) do not use technology to capture bookings made outside of their program. **When companies do not capture invisible spend, it can be difficult to receive negotiated discounts, conduct pre-trip approvals, locate or assist travelers in an emergency, or prevent out-of-policy bookings or upgrades.**

- **Traveler safety and experience:** Are companies more traveler focused today? In some ways, they appear to be. Many emphasize traveler communication, offer traveler-facing technology, or provide access to managed travel services when employees extend work trips for leisure.

  Traveler safety is a growing priority – but loopholes remain. One third of Travel Managers do not know how long it would take to confirm every employee’s safety in an
emergency. In addition, a decent share continue to rely on manual communication methods, such as ad-hoc emails.

- **Content distribution:** Travel Managers think it is important to have control of the “content” they display through corporate booking channels. They value labeling preferred suppliers, controlling the order in which hotel options are displayed, and controlling the rates that are included in the shopping results. **Nonetheless, a decent share say their corporate online booking tool (OBT) promotes their TMC’s preferred suppliers, displaying them higher in the shopping results.**
The Travel Manager’s Role

- The Travel Manager’s role broadens – yet familiar tasks consume a large amount of time. Compared to five years ago, experienced Travel Managers spend more time on a variety of functions today. These include data analysis reporting (66%), evaluating or implementing new technology (66%), and traveler safety/duty of care (60%).

These responsibilities involve collaboration with other stakeholders, which represents a greater time commitment for more than half of experienced Travel Managers.

In addition, TMCs remain relevant strategic partners, focusing on technology, safety and security, and data analysis. Travel Managers continue to spend significant time working with TMCs.

How have Travel Managers made time for these growing demands? Based on their responses, it does not appear they have made time. Fewer than one-quarter spend less time on

### Compared to 5 years ago, how much time do you spend on the following today? (n=76-101)

<table>
<thead>
<tr>
<th>Task</th>
<th>Less/Much less</th>
<th>The same amount</th>
<th>More/Much more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data analysis/reporting</td>
<td>6%</td>
<td>28%</td>
<td>66%</td>
</tr>
<tr>
<td>Evaluating or implementing new technology</td>
<td>9%</td>
<td>25%</td>
<td>66%</td>
</tr>
<tr>
<td>Traveler safety/duty of care</td>
<td>8%</td>
<td>32%</td>
<td>60%</td>
</tr>
<tr>
<td>Cross-department meetings or collaboration</td>
<td>18%</td>
<td>29%</td>
<td>52%</td>
</tr>
<tr>
<td>Managing or fine-tuning technology that we already use</td>
<td>16%</td>
<td>36%</td>
<td>48%</td>
</tr>
<tr>
<td>Working with TMCs</td>
<td>7%</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Managing corporate cards/payment</td>
<td>24%</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td>Communicating with travelers or addressing their concerns</td>
<td>12%</td>
<td>54%</td>
<td>34%</td>
</tr>
<tr>
<td>Negotiating with airlines</td>
<td>14%</td>
<td>56%</td>
<td>30%</td>
</tr>
<tr>
<td>Negotiating with hotels</td>
<td>19%</td>
<td>56%</td>
<td>26%</td>
</tr>
<tr>
<td>Troubleshooting travel reservations</td>
<td>38%</td>
<td>38%</td>
<td>23%</td>
</tr>
<tr>
<td>Administrative tasks</td>
<td>33%</td>
<td>44%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Note: Question only displayed to Travel Managers with at least five years of experience.

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1 In this study, experienced Travel Managers are defined as those who have worked in “business travel management” for at least five years.

2 This could partly reflect psychological response bias – the tendency of survey takers to think they are busier than they actually are.
familiar tasks—such as negotiating with suppliers or managing corporate cards/payment—while a larger share spend more time.

A decent share spend less time *troubleshooting travel reservations* (38%) or *performing administrative tasks* (33%), such as pre-trip approvals or expense reconciliation. This could reflect technology automation, such as the integration of booking and expense platforms (see next page), which has freed time for other priorities.

- **Regardless of their experience, Travel Managers have adapted to changing business demands.** Very experienced Travel Managers—who have at least 15 years of experience—have seen their role change in similar ways as their less experienced counterparts.

### What Do Travel Managers Spend *More* Time On?

- **by years of experience**

<table>
<thead>
<tr>
<th>Activity</th>
<th>5 to less than 15 years</th>
<th>15 or more years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data analysis/reporting</td>
<td>68%</td>
<td>65%</td>
</tr>
<tr>
<td>Evaluating or implementing new technology</td>
<td>59%</td>
<td>70%</td>
</tr>
<tr>
<td>Traveler safety/duty of care</td>
<td>54%</td>
<td>64%</td>
</tr>
<tr>
<td>Cross-department meetings or collaboration</td>
<td>62%</td>
<td>47%</td>
</tr>
<tr>
<td>Managing or fine-tuning technology that we already use</td>
<td>45%</td>
<td>50%</td>
</tr>
</tbody>
</table>

- 5 to less than 15 years (n=34-38)    15 or more years (n=58-63)
Technology Innovation

Data integration

- **Data integration can make the Travel Manager’s job easier**, simplifying day-to-day tasks such as expense reconciliation and approval. However, it is not yet widespread.

  - Only half (51%) of travel programs use an integrated travel and expense tool, slightly higher than the share (47%) obtained last year. 3
  
  - Even though duty of care is a growing priority, only one quarter (27%) of travel programs use an integrated booking, expense, and safety tool. This reflects an increase from last year (21%).4 Integration gives companies greater visibility before expense reports are submitted and reconciliation occurs. This allows them to use expense data in real-time for traveler tracking and assistance.

Booking innovation

- **The booking process remains a cornerstone of travel management,** “enabling virtually every function that travel programs perform,” according to a GBTA study conducted last year.5

For business travelers, however, the process is not always painless. In interviews, one said her company-provided booking tool was “not user-friendly,” while another mentioned the inconvenience of booking a flight through his company’s tool, and using the carrier’s website or mobile app to check in or purchase upgrades.

However, this may change as booking providers focus on several innovations to improve the user experience. Outlined below is the interest Travel Managers indicated in offering these innovations through their program.

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3 This increase may not be statistically significant
4 This increase may not be statistically significant.
• **Consumerization:** *Offering a more user-friendly booking experience.* Four out of five (78%) Travel Managers rank this among the top three innovations they are most excited about offering out of the six assessed.

• **Personalized booking and predictive intelligence:** Seven out of 10 (70%) Travel Managers rank *personalized booking* among the top three innovations they are most excited about offering. This involves an *online booking tool analyzing past purchases or using traveler profile data to offer more relevant booking options in the future.* Some Travel Managers are also interested in *predictive intelligence,* which involves *predicting traveler preferences based on personal information,* such as age or gender. Two out of five (40%) rank this among the top three innovations they are excited about offering. In interviews, several business travelers said they were interested in a more personalized booking experience.

• **Chat capabilities:** Booking providers are introducing chatbots that *use artificial intelligence (AI) to answer questions during the booking process.* Yet many travel Managers still prefer a human “touch”. One third (32%) include AI chat as one of the three innovations they are most excited about. A larger share (67%) include *live travel agents answering questions through a chat feature in the booking tool.*

• **Virtual reality:** Thirteen percent of Travel Managers rank *using a virtual headset to experience 3-D simulations of travel choices, such as hotel rooms or airline seats,* among the top three innovations of interest.
Policy Compliance and Invisible Spend

- **Experienced Travel Managers have differing views about the recent direction of corporate travel policies.** While two out of five (40%) agree travel policies are generally *more flexible today*, compared to five years ago, a similar percentage agree they are *more strict* (43%) or *about the same* (36%).

- **While travel programs generally restrict booking through consumer channels, they may allow it on rare occasions.** Seven out of 10 (72%) “never” or “rarely” allow direct booking on supplier websites. However, this includes 48% who “rarely” allow it, suggesting some flexibility for exceptions. Almost half (48%) “never” allow booking with online travel agencies, while 35% “rarely” allow it.

- **Nonetheless, outside bookings commonly occur.** On average, 37% of hotel bookings, and 15% of air bookings, are made outside of a TMC or online booking tool (see next page). In interviews, business travelers mentioned several reasons why they book outside of company channels. These include earning better loyalty rewards, finding a more convenient hotel, planning a complex international trip, and wanting to stay at a hotel where a conference is taking place.

- **Even when travel programs have strict policies in place, they still experience leakage.** When Travel Managers have a “mandated” policy in place, they estimate that 35% of their hotel bookings, and 13% of their air bookings, are made outside of corporate channels. These are almost identical to the averages among programs with more flexible policy “guidelines” (see next page).

- **Travel programs may have difficulty capturing invisible spend.** Eighty percent do not use technology to capture bookings made outside of their program. An even larger share (86%) do not *use a tool that enables suppliers to automatically send direct reservations to TMCs*, or *a tool that applies their policy and ensures negotiated rates are honored when bookings are made outside of the booking tool* (81%).

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6 Note: These percentages do not add to 100. Respondents were asked three different questions, and some gave inconsistent answers.
When companies do not capture invisible spend, it can be difficult to receive negotiated discounts, conduct pre-trip approvals, locate or assist travelers in an emergency, or prevent out-of-policy bookings or upgrades.

Even when companies have flexible travel policies, they commonly use negotiated rates. When Travel Managers have policy guidelines, they estimate that 53% of their company’s hotel bookings are their own negotiated rates. This is identical (53%) to the average among those who follow "mandated" policies.\(^7\)

\(^7\) Note: These figures are based on data collected for a forthcoming GBTA study, scheduled for release in September 2018; they may or may not appear in the September study.
Traveler Safety and Experience

Traveler safety

- A large majority (69%) of respondents say their Travel Department plays a role in duty of care.

- Traveler safety is a growing priority. More than half (60%) of experienced Travel Managers spend more time on traveler safety/duty of care, compared to five years ago.

In addition, most travel programs use various risk management services, such as a third-party risk firm, or a safety and security tool (see below). Adoption of a safety and security tool appears to have risen in the past year.

Adoption of Safety-related Services and Technology

- About half of travel programs use various forms of automated communication, including automated email to employees’ corporate email addresses (53%), and automated SMS (text) via a mass communication system (46%).

<table>
<thead>
<tr>
<th>Service Description</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety and security management tool</td>
<td>61%</td>
<td>70%</td>
</tr>
<tr>
<td>Services or technology of third-party safety or security company</td>
<td>65%</td>
<td>63%</td>
</tr>
<tr>
<td>Integrated booking, expense, and safety tool</td>
<td>21%</td>
<td>27%</td>
</tr>
</tbody>
</table>
• While traveler safety is a growing priority, some loopholes may still remain.

  ▪ **Traveler location:** Despite growing adoption of safety and security technology (see previous page), one-third of Travel Managers still do not know how long it would take to confirm every employee’s safety in an incident. This is even higher than the share obtained last year. Moreover, travelers may expect their company to reach out quickly. In an interview, one said he thinks his company “should be able to contact [him]…within an hour”. To locate travelers more effectively, companies should consider adopting automated communication and integrating their security tool(s) with other sources, such as booking and expense data.

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9 Note: The two surveys had different qualification criteria which may explain part of the difference.

10 Note: Difference is probably not statistically significant.
On average, how much time usually elapses from the moment an incident occurs until you have confirmation of every employee’s safety?

2017 (n=123) 2018 (n=135)

- Less than 1 hour
- 1-2 hours
- More than 2 hours
- Don’t know

Communication: To communicate about disruptions or emergencies, many programs continue to use manual methods (see previous page). When using these methods, the amount of time needed to contact employees can vary. If a small number of employees are impacted, it may take minutes to reach them all. If a large number are impacted, it may take hours.

Data integration: One-quarter (27%) of travel programs use an integrated booking, expense, and safety tool, as shown earlier. When companies integrate data in a single system, they can quickly pinpoint a traveler’s location in an emergency or disruption.

While most Travel Managers use an app provided by their TMC or one of its partners, few say their app includes duty of care features (23%) or provides travel policy information (21%). However, many companies may use separate safety and security apps.
• Small programs—those with travel spend of less than $10 million—lag behind large programs ($30 million+) when it comes to adoption of various safety-related services. However, these companies may engage in less international travel. Medium-spend programs—those with spend of $10 to $30 million—lag behind large programs when it comes to automated communication.

Adoption of Safety-related Services and Technology
-by company travel spend

<table>
<thead>
<tr>
<th>Services or technology of third-party safety or security company</th>
<th>Safety and security management tool</th>
<th>Automated email to employees' corporate email addresses</th>
<th>Automated SMS via mass-communication system</th>
</tr>
</thead>
<tbody>
<tr>
<td>42% 67% 73%</td>
<td>52% 77% 73%</td>
<td>43% 50% 65%</td>
<td>37% 43% 57%</td>
</tr>
</tbody>
</table>

Less than $10 million (n=31) $10 million to less than $30 million (n=43) $30 million or more (n=37)

Traveler experience

• Are companies more traveler-focused today? In some ways, they appear to be, with many emphasizing traveler communication, or offering traveler-facing technology.

  ▪ One third (34%) of experienced Travel Managers spend more time communicating with travelers or addressing their concerns, compared to five years ago.
Most travel programs offer traveler-facing technology, such as apps for expense management, mobile itinerary management, or ones provided by their TMC or one of its partners. ¹¹

Many travelers extend work trips for leisure. When they do, most travel programs allow using managed travel services for the leisure portion (see next page). However, travelers may not always take advantage of these services. In interviews, several said they would still book the leisure portion of the trip through consumer channels, even if they could use a corporate tool.

<table>
<thead>
<tr>
<th>Adoption of Traveler-facing Technology (n=119-136)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online booking tool</td>
</tr>
<tr>
<td>Expense management</td>
</tr>
<tr>
<td>App provided by TMC or one of its partners</td>
</tr>
<tr>
<td>Safety and security management</td>
</tr>
<tr>
<td>Mobile itinerary management</td>
</tr>
</tbody>
</table>

When travelers combine business and leisure travel, does your company allow them to….? (n=114-115)

<table>
<thead>
<tr>
<th></th>
<th>Use our negotiated rates for the leisure portion</th>
<th>Book the leisure component through company channels</th>
<th>Use TMC services on the leisure portion (e.g. assistance hotline)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not sure</td>
<td>13%</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Yes - always</td>
<td>40%</td>
<td>37%</td>
<td>43%</td>
</tr>
<tr>
<td>Yes - sometimes</td>
<td>44%</td>
<td>41%</td>
<td>30%</td>
</tr>
<tr>
<td>No - never</td>
<td>44%</td>
<td>41%</td>
<td>30%</td>
</tr>
</tbody>
</table>

¹¹ Note: Respondents qualified for this survey if their company uses a TMC for “any product or service.” Adoption of these products would likely be lower among companies that do not use a TMC.
Content Distribution

- The Microsoft Travel Innovation Summit’s *Corporate Travel Manifesto* brought renewed attention to travel content distribution, raising two questions in particular.\textsuperscript{12}

  - **Technology disruption**: How will new technologies—such as the New Distribution Capability (NDC) and blockchain—impact key distribution players including TMCs and GDS providers?

  - **Financial incentives**: TMCs may sometimes have an incentive to steer bookings toward suppliers that pay them commissions or incentives. How aggressively do they actually do this? What impact will this have on travel programs?

These issues were a key focus of this study.

- Travel Managers think it is important to have control of the “content” they display through corporate booking channels. They value labelling preferred suppliers, controlling the order in which hotel options are displayed, and controlling the rates that are included in the shopping results.

Thinking about your booking tool, how important is it to have control over the following elements of the shopping experience? (n=114-115)

<table>
<thead>
<tr>
<th>Element</th>
<th>1-3: Not important</th>
<th>4-7: Somewhat important</th>
<th>8-10: Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Being able to label preferred and non-preferred suppliers</td>
<td>5%</td>
<td>85%</td>
<td>93%</td>
</tr>
<tr>
<td>Having control of the order in which hotel options are presented to travelers</td>
<td>13%</td>
<td>82%</td>
<td>85%</td>
</tr>
<tr>
<td>Having control over the hotel rates that are displayed to travelers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Even though virtually all Travel Managers think it is important to control the content they display, more than two out of five (44%) say their OBT promotes their TMC’s preferred suppliers, displaying them higher in the shopping results.

• Only 3% of Travel Managers say their OBT suppresses content their TMC does not wish to display. However, this practice may be more common than Travel Managers realize.

Thinking about flights and hotels in particular, is your primary booking tool configured for the following? Please select all that apply. (n=115)

- Company Preferred suppliers appear higher/NonPreferred suppliers appear lower: 95%
- Notifications are displayed to travelers when they make out-of-policy bookings: 83%
- Company Preferred suppliers are graphically promoted in the tool: 82%
- TMC Preferred suppliers appear higher/NonPreferred suppliers appear lower: 44%
- Manual approval is required for out-of-policy bookings: 30%
- TMC Preferred suppliers are graphically promoted in the tool: 19%
- Company Non-preferred suppliers aren’t shown in shopping results: 8%
- TMC Non-preferred suppliers aren’t shown in the shopping results: 3%

Note: Question only displayed to respondents who say their company has an OBT
While Travel Managers value having control of the content they display, most (74%) would promote their TMC’s preferred suppliers, in exchange for a reduced transaction fee. However, two out of five (40%) say the amount of the reduction would have to exceed $5 per transaction.

How would you respond if your TMC requested the ability to promote their preferred suppliers in your OBT? (n=110)

- I would not allow it under any circumstances
- Would consider in exchange for reduced transaction fee of $5 or less
- Would consider in exchange for reduced transaction fee of $5--$10
- Would consider in exchange for reduced transaction fee of $10-$20

Note: Question only displayed to respondents who say their company has an OBT

Even though travel programs of all sizes would allow their TMC to promote its preferred suppliers, large programs would demand a larger fee reduction, whereas small programs would settle for a smaller one. The reason for this difference is unclear. One possible explanation is that large programs typically have more negotiated discounts, or better discounts, and benefit from maintaining their volume or market share with preferred suppliers.

How would you respond if your TMC requested the ability to promote their preferred suppliers in your company’s OBT?

- by company travel spend

<table>
<thead>
<tr>
<th>Less than $10 million (n=27)*</th>
<th>$10 million to less than $30 million (n=40)</th>
<th>$30 million or more (n=35)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would not allow it under any circumstances</td>
<td>19% 23% 34%</td>
<td>30% 35% 20%</td>
</tr>
<tr>
<td>Would consider in exchange for fee reduction/avoidance of $5 or less</td>
<td>44% 38% 20%</td>
<td>30% 35% 20%</td>
</tr>
<tr>
<td>Would consider in exchange for fee reduction/avoidance of $6-$10</td>
<td>30% 35% 20%</td>
<td>30% 35% 20%</td>
</tr>
<tr>
<td>Would consider in exchange for fee reduction/avoidance of $11-$20</td>
<td>7% 5% 26%</td>
<td>30% 35% 20%</td>
</tr>
</tbody>
</table>

*Small sample size for low-spend programs
Conclusion

The value of managed travel programs continues to expand. Travel Managers not only drive cost savings, but also play a critical role in traveler safety, business analytics and decisionmaking, and employee well-being.

Travel Managers should consider the following recommendations to “future-proof” their programs:

1) **Embrace efficiency:** Even as the Travel Manager's role broadens, familiar tasks still consume time. **Technology automation can give Travel Managers more time to spend on growing priorities such as improving employee experience and safety.**

2) **Capture invisible spend:** A decent share of bookings are made outside of corporate channels. **When companies do not capture invisible spend, it can be difficult to receive negotiated discounts, conduct pre-trip approvals, locate or assist travelers in an emergency, or prevent out-of-policy bookings or upgrades.**

3) **Confirm OBT content display:** Almost half of Travel Managers say their OBT promotes TMC-preferred suppliers. **Travel Managers should understand how their TMC promotes its preferred suppliers. If necessary, they should address this practice in their TMC contract.**

4) **Focus on traveler safety:** Even though duty of care is a growing priority, a number of loopholes remain. Travel programs should ensure they are able to locate and communicate with all of their travelers in an emergency. **To locate travelers more effectively, travel programs may consider adopting automated communication, or integrating their safety tools with other sources, such as booking or expense data. They might also practice regular “fire drills” to test how long it would take to locate their employees.**
Works Cited


Respondent Profile

Travel Policy Type (n=155)

- Mandated: 36%
- Guidelines: 63%
- We do not have a written policy

Years of Travel Management Experience (n=143)

- Less than 5: 24%
- 5 to less than 20: 42%
- 20 or more: 34%

Organization Type (n=116)

- Government: 6%
- Nonprofit: 14%
- For-profit: 80%
Annual Travel Spend (n=114)

- Less than $10 million: 27%
- $10 million to less than $30 million: 38%
- $30 million or more: 32%
- Not sure: 3%

Industry (n=115)

- Professional, scientific, and technical: 19%
- Manufacturing: 18%
- Retail/wholesale trade: 10%
- Non-profit, association, and foundation: 10%
- Health care, pharmaceuticals, and social assistance: 8%
- Finance and insurance: 7%
- Media, information, and communications: 3%
- Educational services: 3%
- Travel and meetings management: 2%
- Transportation and warehousing: 2%
- Public administration: 2%
- Mining, oil and gas extraction, and utilities: 2%
- Other: 16%
About the Global Business Travel Association

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.

About SAP 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.