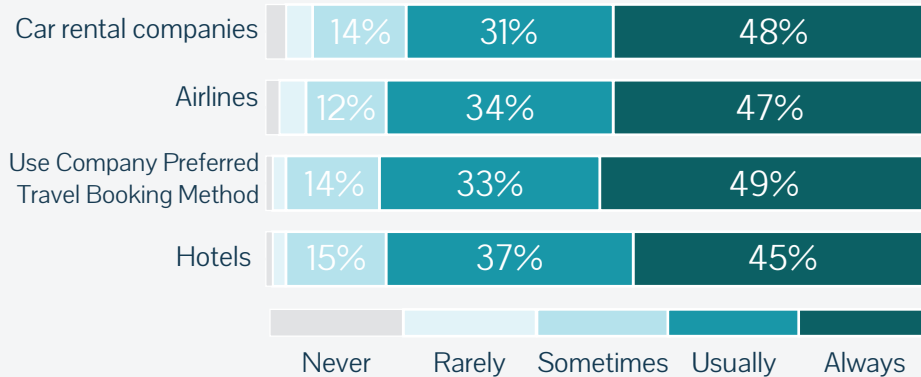


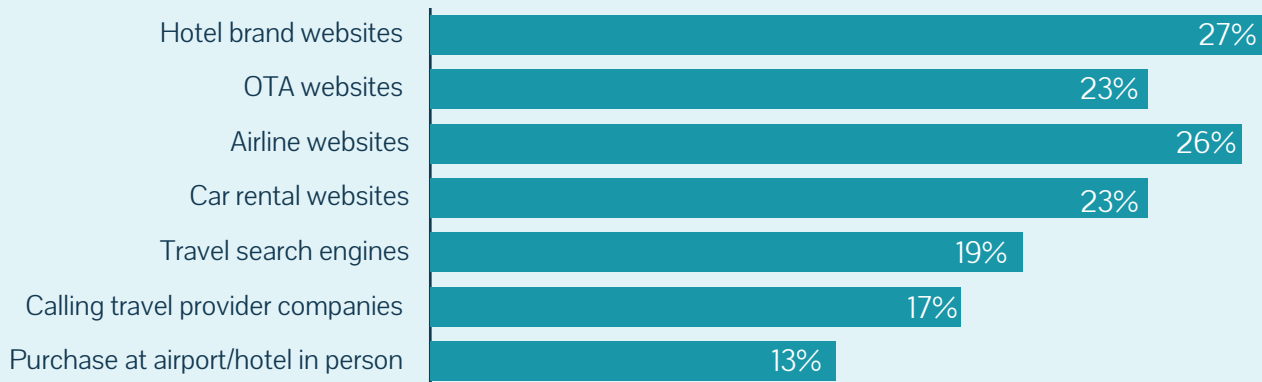
# INVISIBLE SPEND



## 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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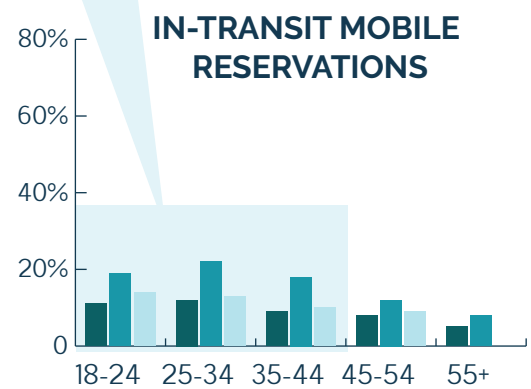
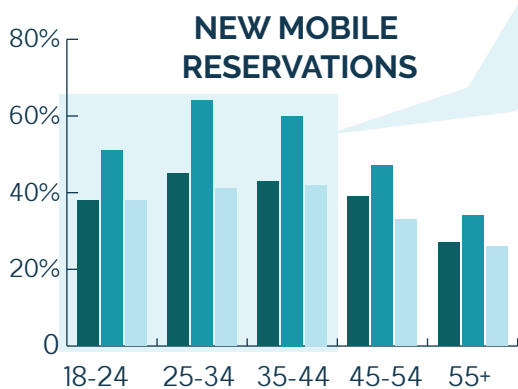
# MILLENNIALS ARE CHANGING MANAGED TRAVEL



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

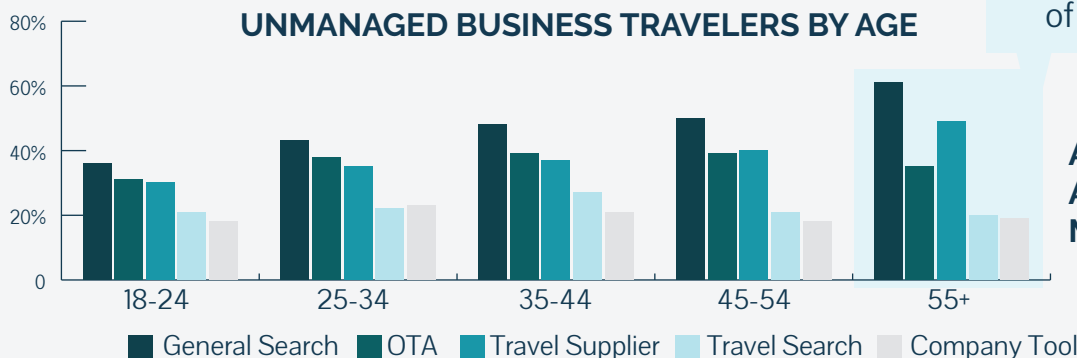
## MILLENNIALS AND GEN X

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



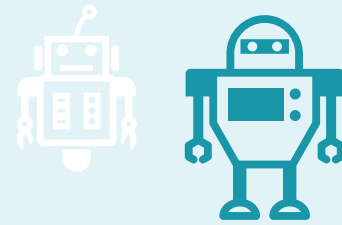
55+ have the highest use of travel supplier sites

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%

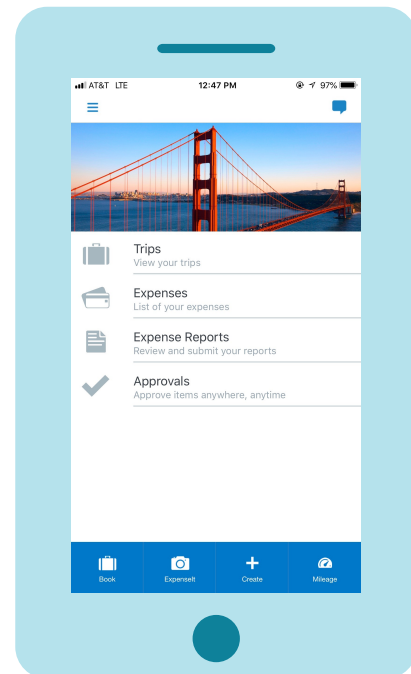
want to chat with their travel agent

19%

want to chat with customer service

64%

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



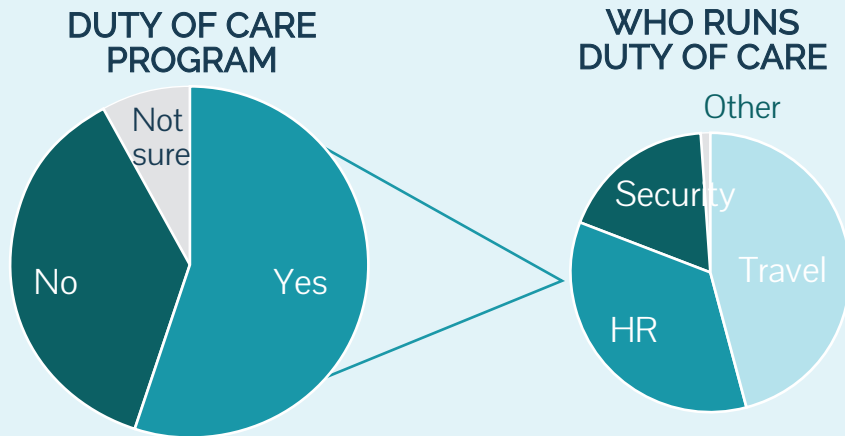
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# DUTY OF CARE

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

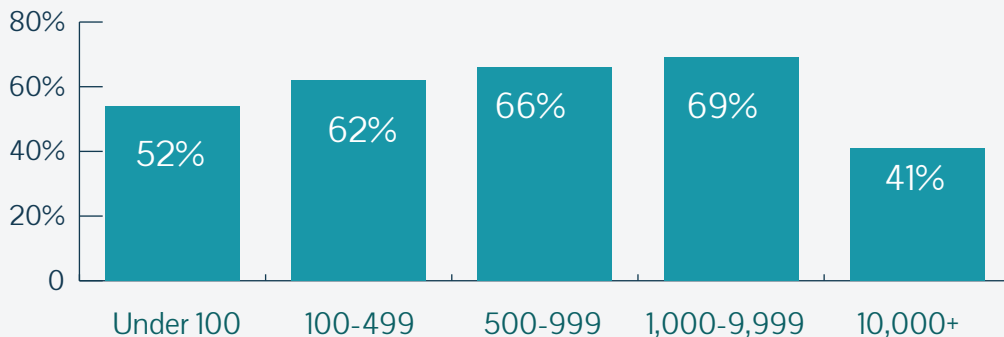
**46%** DUTY OF CARE RUN BY TRAVEL DEPARTMENT



Travel departments rely heavily on their TMCs for duty of care employee tracking. With more than 1/2 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

**DUTY OF CARE PROGRAMS BY COMPANY SIZE**



**72%** OF MANAGED TRAVEL COMPANIES HAVE DUTY OF CARE



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