

# **Empower The Future Of Work With Intelligent Travel And Expense Solutions**

How Integrated, AI-Driven Travel And Expense Platforms  
Unlock Employee Value And Save Money

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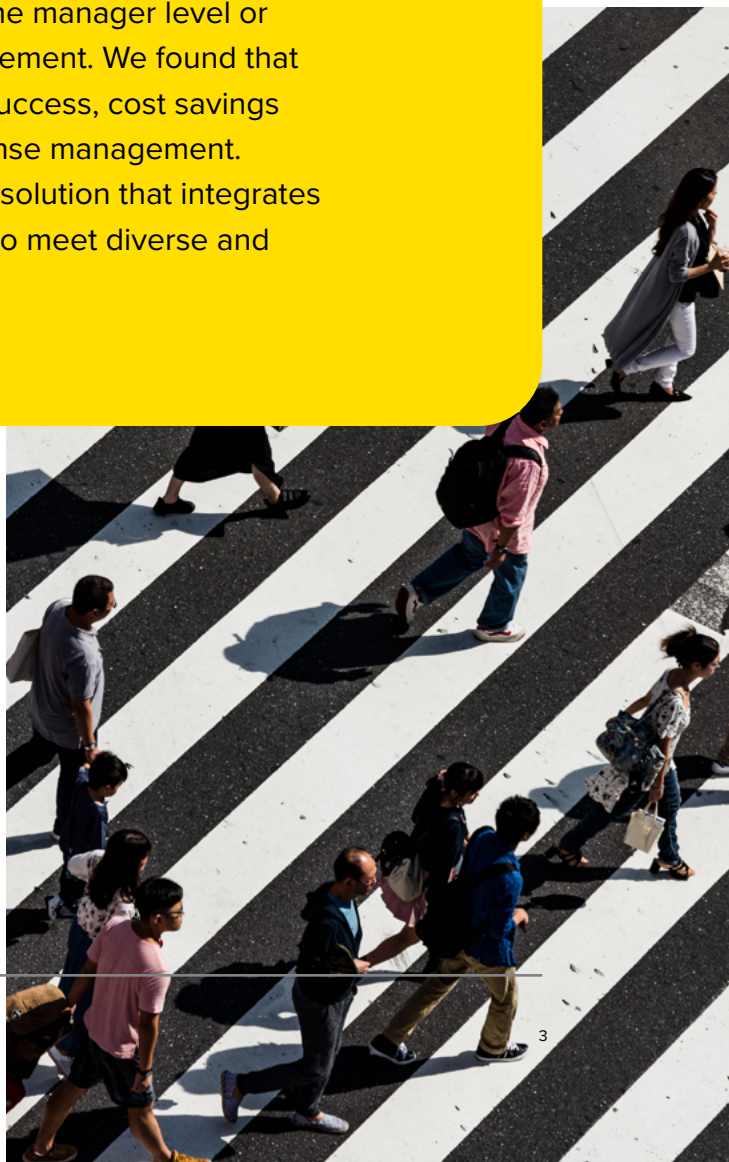


## Executive Summary

To combat inflation, rising interest rates, and supply chain disruptions, investing in technologies that strengthen business resilience, improve operations, and create value is imperative. Furthermore, as the future of work becomes reality, employees are calling for processes and policies that are efficient, safe, cost-effective, and productive. Corporate travel and expense (T&E) management is a prime opportunity to achieve all these goals.

Across the globe, organizations are embracing technologies and processes that streamline T&E activities. While automation can play a powerful role in unlocking employee time and energy, highly integrated T&E platforms combined with AI-driven processes improve employee experience (EX), reduce costs, increase ROI, and even contribute to sustainability.<sup>1</sup>

In April 2023, SAP Concur commissioned Forrester Consulting to evaluate T&E challenges and the benefits of intelligent T&E solutions. To explore this topic, Forrester conducted a global online survey of 415 decision-makers with responsibility for T&E software purchasing at the manager level or higher in IT, finance, travel administration, or procurement. We found that while employee travel is fundamental to business success, cost savings and financial visibility are critical concerns for expense management. Organizations of all sizes require an intelligent T&E solution that integrates easily with existing systems and is flexible enough to meet diverse and changing business needs.



## Key Findings



**Decision-makers want a single solution.** An overwhelming number of respondents said they prefer a single platform that manages both travel and expense. Decision-makers whose companies already had these integrated solutions reported significant benefits such as improved data security, greater financial visibility, and enhanced EX.



**Connection is key.** Having a single solution is great, but if it cannot connect to other internal or external systems, it can't deliver the transformational benefits needed. T&E platforms must integrate easily and securely with broader platforms before companies can leverage the most impressive capabilities.



**Employee travel is an important part of business success.** For good reason, a renewed sense of why travel is truly important is pervasive. Everyone knows business travel helps acquire new customers and strengthen existing business relationships. However, it is also vital to company culture, collaboration, innovation, and hybrid work environments. Leaders in companies of all sizes recognize these truths.



**AI-powered T&E is evolving to empower employees.** As AI enters the mainstream, forward-thinking business leaders will find new ways to save money and create value. T&E is an optimal use case for the next generation of AI-powered automation — it frees employees from mundane tasks and unlocks their capacity for greater creativity, innovation, and/or more strategic work.



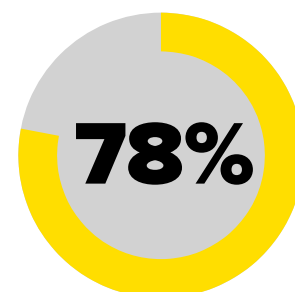
## Travel and Expense Is Evolving

Lasting changes brought about by the COVID-19 pandemic combined with recent global disruptions (think record inflation and disrupted value chains) have brought corporate T&E management to an inflection point as companies adapt to a new way of operating. Faced with companywide budgetary constraints, business leaders are now focused on improving efficiency and reducing costs.

However, despite these constraints, an unmistakably renewed energy surrounding travel has emerged. With business growth still a top priority, intelligent T&E platforms offer the ability to help usher in the future of work by not only delivering cost savings but also by creating value by unlocking workforce time and innovation.

To meet modern demands, T&E solutions must be holistic, easily integrated with existing systems as well as with external partners, and go beyond simply automating processes. They must create value by leveraging AI to avoid mistakes, improve policy compliance, and scale processes to meet changing business needs. In surveying 415 T&E decision-makers across the globe, we found that:

- **Macroeconomic forces are straining businesses of all sizes.** Record inflation, geopolitical instability, and rising cost of capital: The effects are being felt across the globe, from small- and medium-sized businesses to enterprise-level organizations. Sixty-four percent of decision-makers reported their companies are under pressure to manage costs and optimize resources more effectively. In the past 12 months, nearly half of respondents saw increased pressure to improve operational efficiency in response to macroeconomic forces. For 40% of respondents, this pressure led to a reduction of the overall business budget. Returning to pre-pandemic “normal” will likely never happen, and many companies are still learning to adapt and operate in this new paradigm. For some



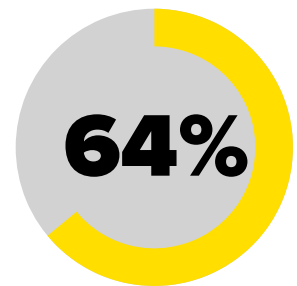
of decision-makers  
want a single solution  
to manage their entire  
T&E process.

decision-makers said, this led to less business travel for client interaction (39%) and internal collaboration (33%), which is a trend more pronounced in Europe and Asia/Pacific (APAC) than in North America.

- **Remote and hybrid work add complexity and increase data-security risk.** Even as employees continue to return to the office, remote and hybrid work are here to stay. The shift to remote operations changes the types of trips and expenses employees claim, meaning many of the new challenges will remain. The most pronounced consequence of remote/hybrid work is increased data security risks for more than half of respondents' organizations. With this increased risk, 72% said they are concerned about personal and company data security as it relates to their T&E solution. But beyond security, remote/hybrid work is driving increased risk of fraudulent or noncompliant activities, new complexity managing travel and spending, and insufficient visibility into spending data. To overcome these challenges, organizations need a T&E solution that empowers both employees and business leaders to thrive in this new environment while ensuring better compliance.
- **Business travel is increasing.** Seventy-seven percent of decision-makers expect demand for travel to grow due to remote work as well as events now happening that were canceled due to the COVID-19 pandemic. While business travel has not yet fully recovered, 32% of decision-makers expect it to increase over the next 12 months, and 58% expect travel to remain steady.

## **AUTOMATION, EMPLOYEE EXPERIENCE, AND INNOVATION DRIVE GROWTH**

Even with wide spread budgetary constraints, growing and scaling the business is still a top priority. Facing this uphill battle, business leaders are looking for new ways to create value, and automation remains a powerful tool. However, when implementing automation alone, companies cannot realize its full potential. If implemented properly, the next generation of AI-power automation will improve company culture and unlock value across the organization in new and powerful ways.



of respondents' companies are under pressure to manage costs and optimize resources more effectively.

- **Automate T&E to increase efficiency and productivity.** T&E tasks can be tedious and repetitive, which drains employees' valuable time. When asked about their companies' initiatives in the coming year, T&E decision-makers noted that the most important companywide goal is to improve efficiency and productivity by increasing automation, with 76% reporting it is a critical or high priority (see Figure 1). Two-thirds said that a more automated T&E platform will deliver the needed boost to efficiency and productivity, and 77% reported that automating approvals and audits is more important now with the added pressure to increase efficiency and reduce costs.
- **Automate T&E to improve EX and drive innovation.** Improving EX is the second most important companywide initiative in the study, with 72% of decision-makers ranking it a critical or high priority. Sixty-one percent reported the same for improving their companies' ability to innovate and adapt. At a fundamental level, investing in advanced automation is an investment in employees. When done well, it frees the workforce from mundane tasks and unlocks their capacity for greater creativity, innovation, and more strategic work.

Employees drive productivity. Engage and empower them with a better work experience through AI-powered T&E validation so they can better leverage their creativity and relationship-building skills to do what machines cannot: grow the business.

**Figure 1**

### Company Initiatives In The Coming Year

(Showing total of “High priority” and “Critical priority” responses)

Increasing automation to improve efficiency and productivity	76%
Improving EX	72%
Growing and scaling business	67%
Improving ability to innovate/adapt	61%
Improving sustainability/resiliency	60%
Improving cash-flow management	54%
Managing regulatory and tax compliance and reporting	51%
Reducing internal financial and compliance risk	47%

Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

## EMPLOYEE TRAVEL DRIVES BUSINESS SUCCESS

Human relationships are at the heart of business success. They drive new-customer acquisition, generate momentum with existing clients, build company culture, and fuel innovation.

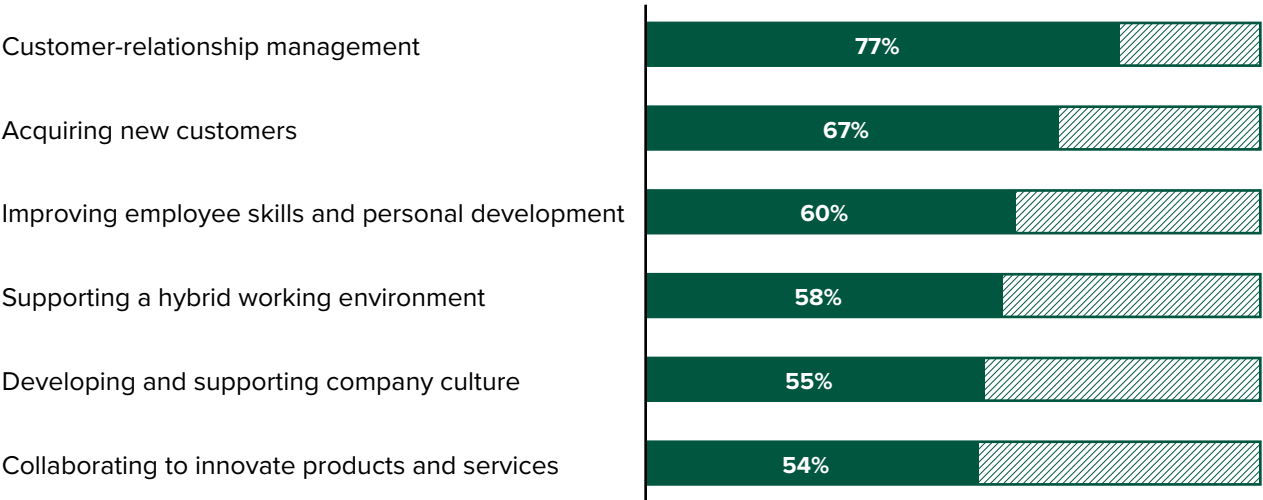
Video-conferencing technology opened a new way to conduct business, leading to unexpected cost savings. But while the remote/hybrid work model can work well on a day-to-day basis, it removes an important element from the equation: Long-lasting, meaningful relationships are built over time and in person.

Of the many significant ways employee travel is essential to conducting business, the most important according to 77% of decision-makers is managing customer relationships, including customer satisfaction, cross-selling, and upselling (see Figure 2). Sixty-seven percent reported the same for acquiring new customers. This underscores the intuitive understanding that sharing a meal or talking through a problem face-to-face with a client allows us to communicate more fully, be more creative, and build stronger bonds.

**Figure 2**

### Importance Of Employee Travel To Achieving The Following Goals

(Showing total of “Very important” and “Important” responses)



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

Employee travel also creates value by improving employee skills (60%), supporting hybrid work (58%), developing company culture (55%), and collaborating to innovate products and services (54%).

These findings held for both small- and medium-sized businesses as well as enterprise companies. Employees are the core of any organization, no matter the size. Bringing them together to bond and collaborate, grow, and learn from each other may not be as easy as it once was, but it is no less important. Investing in T&E tools that empower employees and maximize growth while managing costs will define the most successful businesses of the future.

- **Tracking sustainability has a strong foothold in corporate priorities.** Sustainability is one of the top five companywide initiatives: 60% of decision-makers identified it as a critical or high priority. Even with macroeconomic headwinds, more than half of the decision-makers stated that their organizations plan to invest in sustainability initiatives, which indicates they see it as a competitive advantage. As leaders look for ways to not only increase sustainability but also to demonstrate it publicly, they need visibility into sustainability metrics. A modern T&E solution is an important tool to achieve this. Whether it is helping employees pick the most sustainable travel option, reducing paper from the process, or supporting advanced reporting, an intelligent T&E platform will drive improved sustainability scores.

Decision-makers said increasing automation to improve efficiency and productivity is their organization's most important companywide goal.





## Travel and Expense Challenges Affect The Entire Organization

Since T&E management touches nearly every aspect of business operations, challenges with technology or processes can have a widespread impact. When asked if T&E challenges hurt their organization, 65% of decision-makers reported that constrained T&E resources had a large or very large negative impact on the entire company (see Figure 3). Considering that 96% of decision-makers said that over the 12 months preceding this study, T&E has changed at their organizations, not investing in an integrated, intelligent T&E solution threatens to expose their companies of myriad risks. We found that:

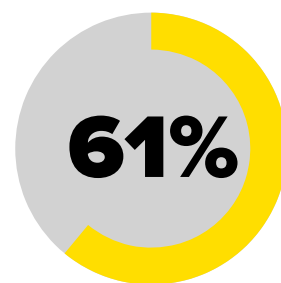
- **Cumbersome processes frustrate employees.** T&E is a prime area to improve EX while driving cost savings. Without employee buy-in, business and T&E leaders risk damaging company culture or driving poor adherence to policies. Seventy-two percent of decision-makers said improving EX is a critical or high priority for their organization, but the lack of automation and cumbersome expense processes are major problems that drain employee time and lead to significant frustration among the workforce. For another 59% of T&E leaders, employee frustration resulted in a large or very large negative business impact at their organizations.
- **Lack of automation costs time and money.** As T&E management evolves to meet new business demands, automating T&E processes is critical to business success. Rather than using scarce and expensive labor, companies can easily set tolerance limits according to expense categories and have the system automatically monitor them. Without automation, identifying fraudulent or out-of-policy spending requires extensive manual work, which is a challenge nearly half of decision-makers said their companies face. With the risk of out-of-policy expenses increasing for 43% of respondents' organizations, automating fraud detection not only saves money, but it also frees employees to spend their time on more value-adding work. Lack of automation also contributes to delays in T&E processes and expense reporting. However, with built-in AI-driven processes, automation takes on new power as it continuously learns and improves its ability to

ensure compliance and save money.

- **Inadequate visibility into spending compounds the impact of constrained budgets.**

As budgets tighten and the scrutiny of spending increases, effectively managing T&E will play a crucial role in weathering economic headwinds. Firms need to preserve capital, especially as inflationary and recessionary pressures loom. To contend with these cost-saving challenges, finance leaders are reprioritizing smart, cost-effective decisions that support critical employee travel and spend. However, it is concerning that 61% of decision-makers noted their organizations' finance leaders do not have enough visibility into near-real-time employee spend data. Digging deeper, we found that many companies struggle to track spending (54%) or do not have timely financial data to make important decisions (47%). This is happening even as visibility into financial data is increasingly more important to organizations (44%). When nearly half of respondents say their organizations don't have the data they need to make decisions, something is seriously wrong.

- **Data security is a top concern.** As data security becomes more regulated and threats become more advanced, especially in hybrid working scenarios, 72% of decision-makers are concerned about personal and company data security as it relates to their T&E solution. Because T&E platforms handle large amounts of sensitive data, they must have strict data security standards built in from the ground up.



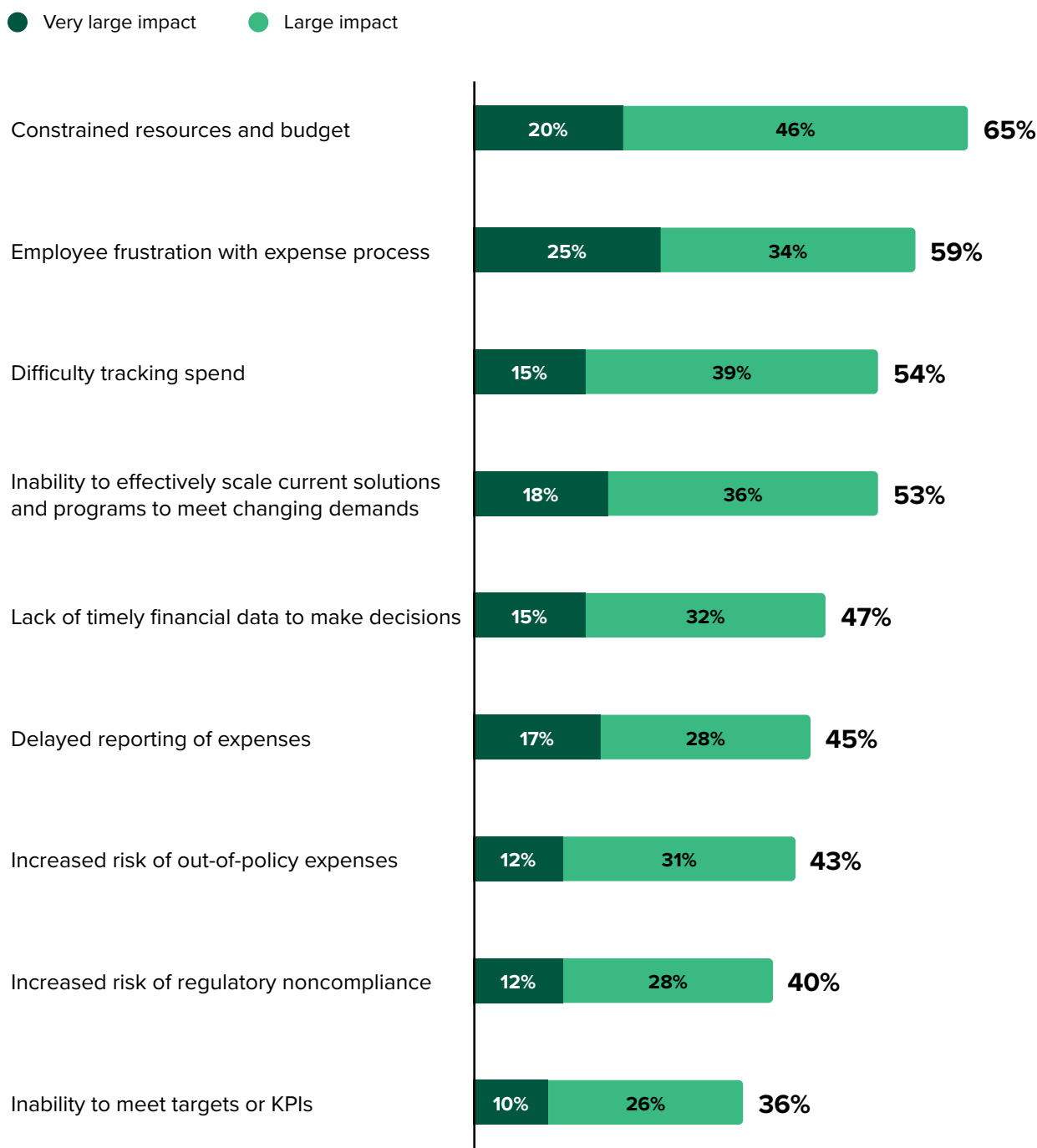
of decision-makers said  
finance leaders at their  
companies don't have  
enough visibility into  
near-real-time employee  
spend data.

## **T&E PLATFORMS THAT CANNOT SCALE HURT BUSINESS**

Manual and semi-automated T&E solutions do not scale and cannot keep up with today's pace of change. Fifty-three percent of decision-makers told us their companies' inability to effectively scale and adapt current T&E platforms and programs has had significant negative business consequences (see Figure 3).

**Figure 3**

**Negative Impact Of The Following T&E-Related Challenges In The Past 12 Months**



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

Note: Total percentages may not equal separate values due to rounding. Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

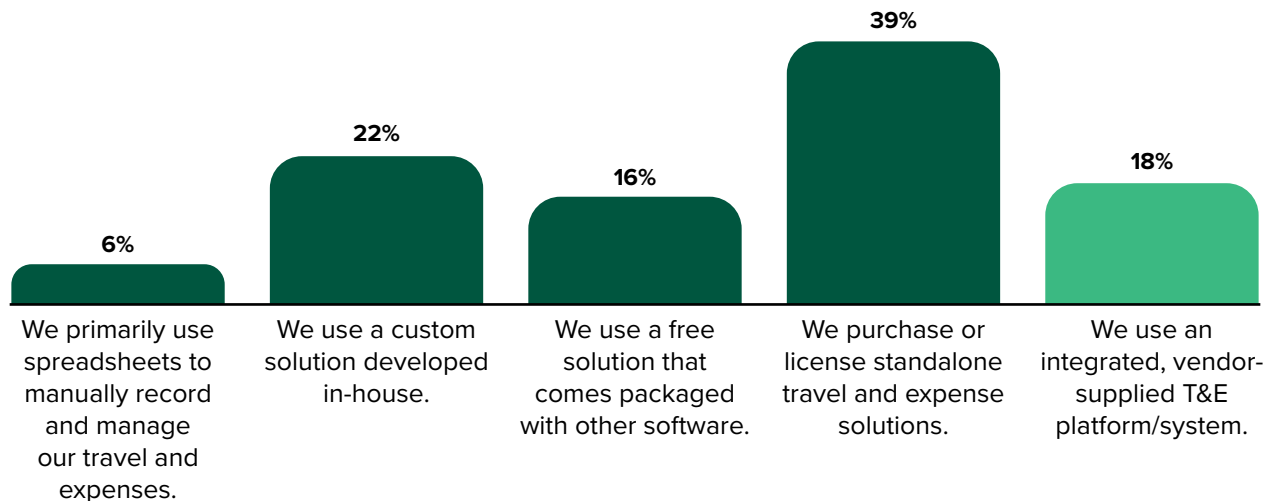
As companies face new challenges such as new types of payment methods (45%), new partners or vendors (37%), or an increased number of spend categories being regularly submitted (36%), implementing an adaptable T&E platform that can meet these needs is critical.

Looking at these patterns at a regional level, only 38% of decision-makers from North American-based companies face new types of payment methods, but in Europe and APAC it is 50% and 47% respectively. However, companies in North America are more likely to face increased T&E-related risk and fraud.

**COMPANIES USING T&E PLATFORMS THAT ARE NOT INTEGRATED FACE SIGNIFICANTLY MORE CHALLENGES**

We asked respondents how their organizations currently manage T&E, and we found that combining T&E into a single platform offers important material benefits. But most companies have not invested adequate resources to integrate their solutions in a single platform (see Figure 4). When looking at organizational challenges, those using non-integrated platforms are much more likely to face a lack of automation, difficulty integrating with other systems, a lack of visibility, and a lack of employee adoption.

**Figure 4**  
**Current Travel And Expense Management Solution**



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

Specifically, only 29% of decision-makers from organizations using integrated platforms reported a lack of automation and tools as a challenge. But of respondents from companies with separate T&E solutions, 54% don't have adequate automation and tools.

When it comes to connecting T&E software to broader business systems, 50% of respondents' organizations using non-integrated solutions struggle compared to only 27% of respondents' organizations with integrated platforms.

Visibility is another important distinction. Decision-makers from organizations that use separate T&E platforms are 1.5 times more likely to say the lack of near-real-time visibility into data, processes, or systems is a challenge for their companies.

## **T&E SOLUTIONS ARE STILL EVOLVING**

Not surprisingly, integrated platforms offer significantly more capabilities. They have better reporting functionality and more robust mobile applications, and their APIs allow integrations to be in real time. They are also more customizable, enabling companies to build a solution that fits their unique business needs more efficiently (see Figure 5).

When asked how satisfied they are with their companies' T&E solution, the most profound differences between integrated and non-integrated platforms are with automating policies and maintaining compliance (72% satisfaction vs. 32% respectively), supporting data-driven decision-making (73% vs. 39%), having a global or multinational reach (76% vs. 44%), and user experience (79% vs. 53%) (see Figure 6).

But even some integrated solutions still do not offer important capabilities. Approximately half of the decision-makers whose companies use an integrated platform said their existing solution does not easily integrate with multiple external partners. And with 70% being the identified threshold for acceptable levels of satisfaction, only 61% of respondents from organizations using integrated platforms are satisfied with their T&E solutions' partner ecosystems.

Investing in a platform that delivers these important capabilities opens new opportunities for business leaders to not just save money, but also to create value by unlocking employees' potential for innovation and more meaningful work.

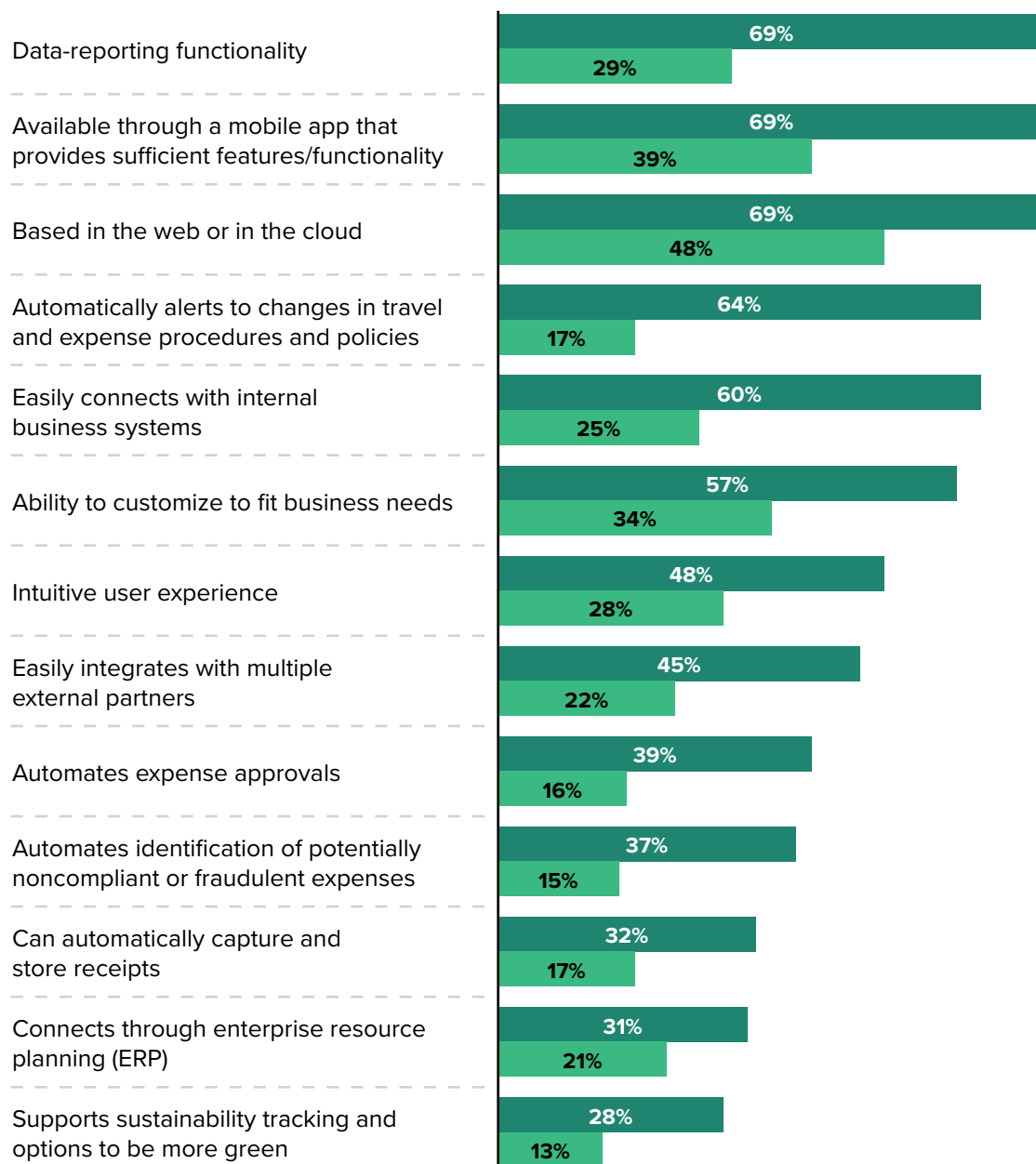


**Figure 5**

## Capabilities Of Existing T&E Solution

● Companies with integrated solution\*

● Companies with non-integrated solution†



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

\*Base: 75 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at organizations that currently use an integrated T&E solution

†Base: 340 global global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at organizations that do not currently use an integrated T&E solution

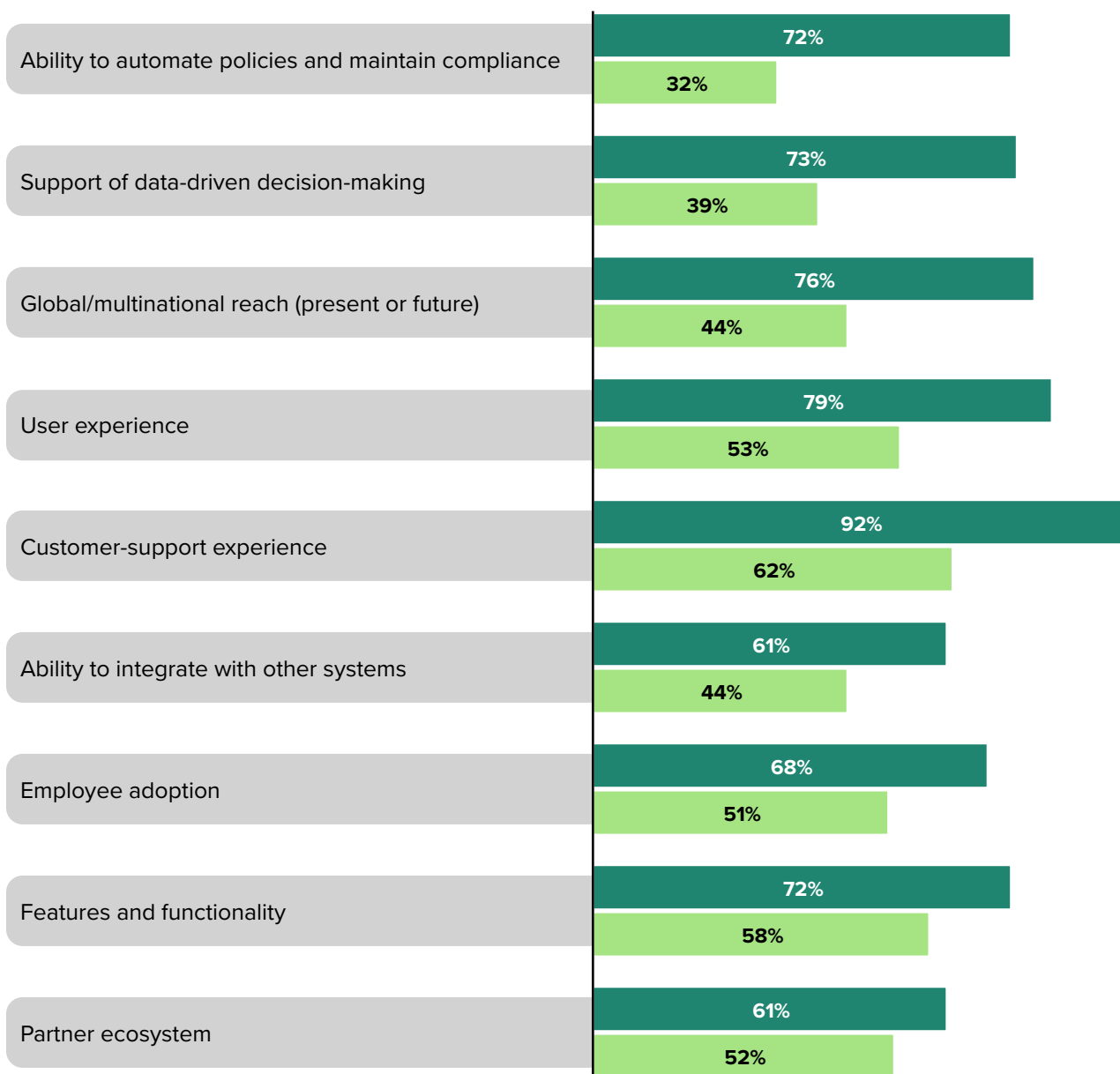
Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

**Figure 6**

**Satisfaction With Existing Capabilities**

● Companies with integrated solution\*

● Companies with non-integrated solution†



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

\*Base: 75 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at organizations that currently use an integrated T&E solution

†Base: 340 global global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at organizations that do not currently use an integrated T&E solution

Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

## Investing In An Intelligent T&E Solution Unlocks Significant Benefits

As T&E management becomes more important to the business, investing in a T&E platform that is widely integrated, automated, and AI-driven offers many important benefits. A modern solution allows T&E management to be an important source of cost savings and value creation. With this in mind, it is no surprise that 78% of respondents said they prefer a single platform to manage their organization's entire T&E process.

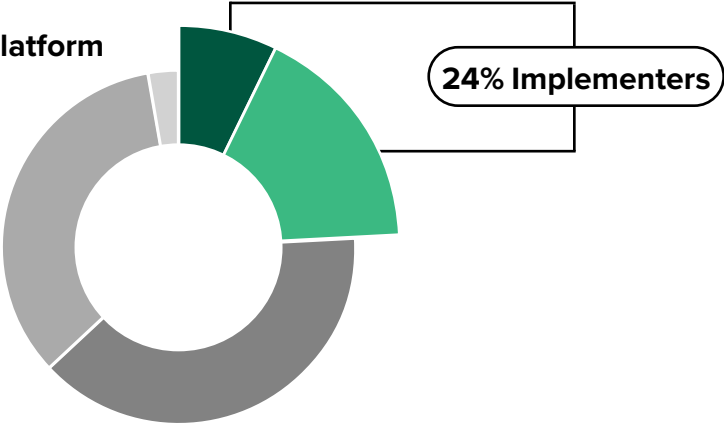
Approximately a quarter of respondents' companies have devoted resources to implementing a modern platform. We'll call those organizations "implementers." We analyzed the benefits they reported from that investment (see Figure 7). But we must also note that another 39% of decision-makers reported their companies intend to implement a modern solution in the next year, while another 34% are interested, but do not yet have plans. Clearly, companies see the value of an advanced solution. We found that:

- **Increasing automation, improving user experience, and controlling costs or cashflow are top T&E goals.** As T&E management enters a new era, understanding the needs of companies and end users is critical to creating a T&E strategy that successfully aligns with topline business goals. Over half of the decision-makers said eight separate objectives or initiatives were critical or high priorities for their organizations (see Figure 8). This speaks to the impact an intelligent, automated T&E solution can have across a company.
- **Next-generation automation unlocks value in multiple important ways.** At a more granular level, we found that AI-powered processes deliver a variety of benefits. Sitting at the top of the list, 75% of respondents said that increasing automation of approval and auditing processes is a critical or high priority. Automation is the most important priority because it allows companies to achieve many other important T&E priorities we asked about, such as improving user experience (68%), controlling costs (62%), and facilitating near-real-time decision-making (56%).

Figure 7

Investment Plans For A Modern T&E Platform

- 7% Expanding or upgrading implementation
- 17% Implemented, not expanding or upgrading
- 39% Planning to implement in the next 12 months
- 34% Interested but no plans to implement
- 3% Not interested



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations  
Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

Figure 8

Importance Of The Following T&E Objectives And Initiatives

(Showing total of “High priority” and “Critical priority” responses)



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations  
Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

## THE BENEFITS OF INTEGRATED, AUTOMATED, AND AI-DRIVEN T&E

Integration and AI-driven processes are now within reach of companies looking to empower their employees and grow their businesses. As T&E management becomes increasingly complex, these tools will continue to become more important to companies looking to save costs, increase compliance, and empower employees to drive innovation.

Looking at the benefits reported by implementers, 54% noted reduced costs and 42% noted improved ROI (see Figure 9). But we found the benefits extend across organizations in important ways:

- **Increasing security and data protection.** With new risks and regulations governing data, 72% of decision-makers are concerned about personal and company data security relative to their organization's T&E solution. A modern platform must deliver at a high level, and 71% identified increased security and data protection as the top benefit of implementing a modern T&E solution in this study.
- **Increasing financial visibility and improving decision-making.** Over half of decision-makers reported that controlling overall company costs, facilitating near-real-time decision-making, and increasing visibility into spending pattern are all critical or high priorities. For many implementers, the benefits match these needs as they reported that their companies have achieved increased financial visibility (68%) and the ability to deliver actionable insights to the business (54%). However, 62% also noted that investment in an intelligent T&E solution led to fewer expense errors, offering greater clarity to financial numbers.
- **Enhancing the user experience goes beyond making employees happy.** Among the many benefits of more advanced automation, improving the user experience is a critical piece to the T&E puzzle: 68% of implementers have seen their modern T&E platform improve EX. At a time when financial visibility is more important than ever, improving the user experience enables employees to enter data more quickly and accurately, giving business leaders the visibility to make important decisions when they need to be made. It can also contribute to an improved company culture by empowering employees and keeping them happy, rather than burdening them with cumbersome processes.

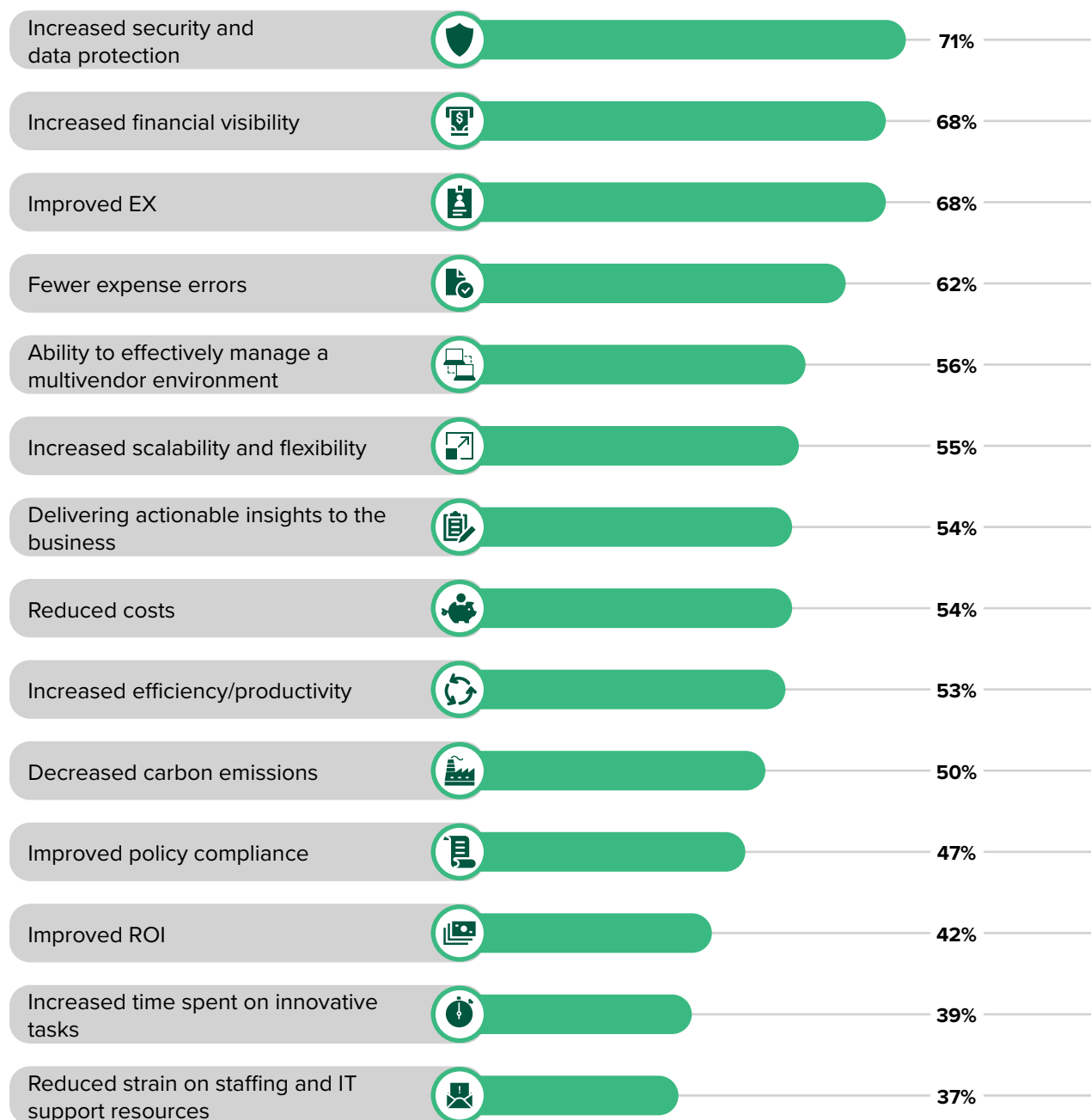


- **Driving efficiency, productivity, and innovation.** Modern T&E solutions allow companies to leverage AI-driven processes and broad integrations to move beyond reducing costs, which is also a major benefit. Respondents whose companies have implemented an intelligent T&E solution reported increased efficiency and productivity (53%), more time spent on innovative tasks (39%), and a reduced strain on staff and IT support resources (37%). As companies expand adoption and transition more fully to a state of empowering employees rather than controlling them, these numbers will grow.
- **Scaling to meet changing business needs.** Companies require a T&E solution that is flexible enough to support their evolving needs as they grow and adapt to changing economic environments. When companies implement an integrated T&E solution, they can increase scalability and flexibility (55%) and effectively manage a multivendor environment (56%).
- **Improving sustainability.** With more visibility into the carbon footprint of travel and the tools to encourage employees to choose more sustainable options, implementing intelligent T&E solutions have decreased carbon emissions for 50% of implementers. Beyond carbon emissions, paperless processes also further reduce negative environmental impacts. To maximize these benefits, developing effective policies and generating employee buy-in will lead to more significant transformation. Importantly, advanced visibility and reporting capabilities allow companies to demonstrate their improved sustainability.

**Figure 9**

**“What benefits has your company realized or would you expect it to realize from investing in a modern T&E solution (i.e., one that is highly integrated, automated, and AI-driven)?”**

(Showing “Implementers” responses)



Base: 98 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing, who have devoted resources to implementing a modern platform

Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

## COMPANIES NEED A ROBUST, DIVERSE, AND HOLISTIC T&E SOLUTION

We asked respondents how important different features of a T&E platform would be to their companies, and we found that modern T&E solutions must provide significant value across a wide range of features and functionality. Notably, over half of respondents said that all 15 features offered for consideration would be critical or important to their companies (see Figure 10). This reinforces the fact that T&E platforms must be robust, diverse, and holistic in order to meet the demands of the future of work.

The most important feature in this study is a mobile application with near parity to the web platform (78%). A thoughtful and effective mobile app affects T&E management in many important ways: It improves convenience for employees, encourages more timely and accurate data entry, enables costs savings, increases compliance, and creates greater visibility for management.

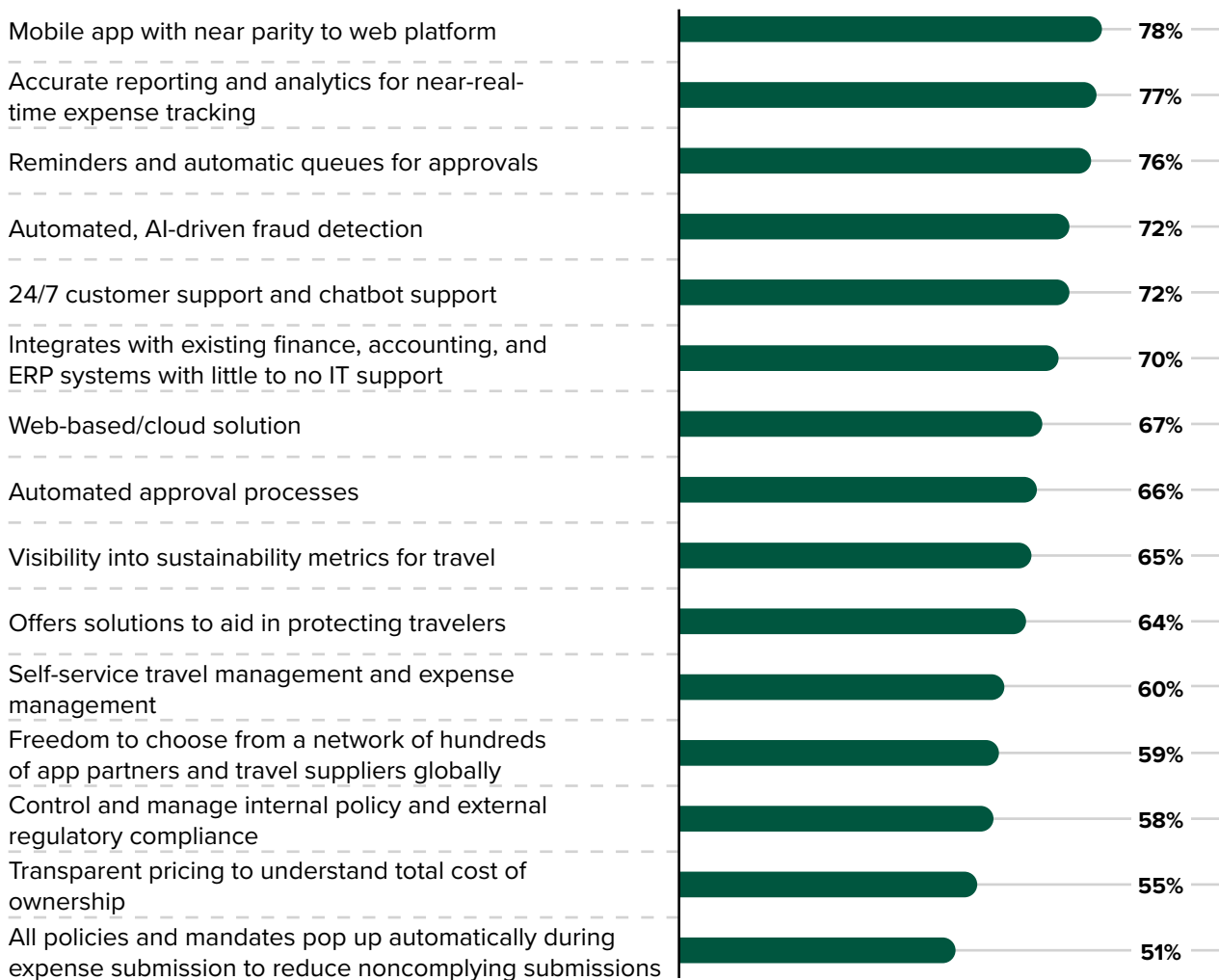
- **Companies need automation throughout their platform.** This study found that automation is a critical or important function across capabilities, including driving queues (76%), fraud detection (72%), and approval processes (66%). Fifty-one percent of decision-makers also said their companies need a solution that automatically displays all policies and mandates during expense submission in order to reduce noncompliance. While automation is not a new phenomenon, injecting AI-driven processes throughout the platform significantly enhances its capabilities and unlocks new benefits.
- **Integration empowers data-driven decisions by improving reporting and visibility.** Integrated T&E platforms are not limited to facilitating processes. They also provide accurate and timely data to make important decisions. Top-performing solutions will deliver accurate reporting and analytics for near-real-time expense tracking as well as visibility into sustainability metrics, which are critical or important capabilities for 77% and 65% of decision-makers, respectively. However, reporting must also be interconnected with other business systems, which is why 70% said their companies need a T&E platform that integrates with existing finance, accounting, and enterprise resource planning (ERP) systems with little to no IT support.

- **Ease of use is a top investment consideration.** Seventy percent of decision-makers agreed that their companies need a T&E platform that can be tailored to meet their companies' unique business needs. When purchasing a new solution, the top five considerations are whether the platform: 1) is easy for employees to use, 2) improves process efficiency, 3) integrates T&E to give a single view, 4) meets data security requirements, and 5) is built by a trusted partner.

**Figure 10**

**“How important are the following features to a modern T&E solution that your company would need?”**

(Showing total of “Critical” and “Important” responses)



Base: 415 global decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing at their organizations

Source: A commissioned study conducted by Forrester Consulting on behalf of SAP Concur, February 2023

## Key Recommendations

Companies must find ways to better control costs while maintaining a level of travel that nurtures client relationships, drives new business, and enables hybrid/remote teams to meet in person. The simple yet critical question that must be considered is, “Will this platform make life easier for our users and travelers?”

Forrester’s in-depth global survey of 415 decision-makers yielded several important recommendations:

### **Develop a business case for an intelligent T&E platform.**

Organizations of all sizes are rethinking the entire T&E journey, from booking to reconciliation and everything in between. Start by building a business case that provides clear and actionable direction. This will help socialize the new and varied ways modern T&E can contribute to business success.

### **Make sure your T&E platform can integrate everywhere you need.**

Simplifying T&E policies, programs, and solutions is a strategic priority for travel and finance leaders. Select a T&E platform that can seamlessly combine fragmented pieces of the full experience — including booking, trip management, customer service, and expensing — all in one convenient integration. This is essential for unifying all company-related expenses, including real-time reporting, transparent tracking, simplified reconciliation, and other cost-reduction solutions. Furthermore, the ability to securely connect to broader platforms such as financial systems through an ERP will play an important role in achieving these goals.

### **Empower your employees through intelligent automation.**

At a time when companies face the dual challenges of attracting and then retaining talent, establishing flexible T&E policies and processes can be a differentiating factor. Put people first while effectively managing ongoing business challenges. When done well, employees feel protected and reciprocate trust by using company-provided tools and technologies.



Automated and simplified tools and policies foster happier employees. Reap the benefits of AI-driven processes, visibility, and insights into your employees' individual preferences, travel practices, and spending patterns to effectively manage costs while maximizing returns.

**Make an important contribution to your organization's sustainability journey.**

Sustainability in corporate travel is no longer part of a wishlist. You need to define and demonstrate responsible corporate practices and rethink new modes of travel. Empower your employees to make their own travel decisions and incentivize them to choose more sustainable options. Track your organization's carbon footprint and nudge employees to make more sustainable choices before, during, and after their journey.

**Have short-term goals but plan for the long haul.**

Continuously push the limits by asking yourself if your T&E solution will improve efficiencies for your finance team and employees. This might be a long journey, so finding a T&E partner that can grow with you is important. Define incremental steps that will help you through the early stages. Start by eradicating paper and manual processes, then remove unnecessary redundancies in the T&E process. Bring in self-service capabilities, advanced automation, and deep integration. Then, become an example of T&E long-term excellence by facilitating team travel, using dynamic benchmarking through incentivizing cost savings, tracking sustainability metrics, and automating receipt itemization.

Implementing these and many other changes have proven to drive growth, improve company culture, and help organizations empower the future of work. To prepare for the future, take time to proactively choose the right T&E platform that can streamline your entire process, improve traveler safety, reduce company costs, create business value, and — most importantly — make employees happier.

## Appendix A: Methodology

In this study, Forrester conducted an online survey with 415 global decision-makers to evaluate T&E challenges and the benefits of intelligent T&E solutions. Survey participants included decision-makers in managerial or more senior positions in IT, finance, travel administration, or procurement for T&E software purchasing. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in February 2023 and was completed in April 2023.

## Appendix B: Demographics

COUNTRY	
United States	22%
Australia	16%
United Kingdom	16%
Germany	16%
Japan	15%
Canada	15%

COMPANY SIZE	
250 to 499 employees	15%
500 to 999 employees	21%
1,000 to 4,999 employees	25%
5,000 to 19,999 employees	23%
20,000 or more employees	15%

T&E SOFTWARE PROCUREMENT RESPONSIBILITY	
Final decision-maker	19%
Part of a team making decisions	41%
Influences decisions	40%

RESPONDENT LEVEL	
C-level	14%
Vice president	25%
Director	29%
Manager	32%

POSITION/DEPARTMENT	
Travel management/admin	33%
IT	31%
Finance/accounting	23%
Procurement	13%

INDUSTRY (SHOWING TOP 6)	
Retail	8%
Healthcare	7%
Telecommunications service	6%
Technology and/or technology services	6%
Business or professional services	6%
Manufacturing and materials	6%

Percentages may not total 100 due to rounding.

## Appendix C: Endnotes

<sup>1</sup> Source: “The Future Of US Jobs, 2032: The Rise Of Human/Machine Teams,” Forrester Research, Inc., March 16, 2022.





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