

2018 Year in Review

Travel & Expense Management Trends

It has been another exciting year for business travel and expense in North America. The SpendSmart™ Year in Review Report tracks T&E spending benchmarks drawn from more than \$3.3B in expense transactions processed by Certify in 2018. We identify the leading expense categories, most expensed brands, and those who are earning the highest ratings.

HOW THE T&E EXPENSE BUDGET WAS SPENT IN 2018

Meals held its position as most expensed category in 2018, with 17.2% of receipts. It's a reminder of just how large—and often overlooked—this category can be for organizations.

T&E Category Benchmark Averages in 2018	
% of receipts by category	
MEALS	17.2%
RIDE HAILING*	15.3%
AIRFARE	13.9%
HOTEL	12.2%
FUEL	11.3%
MISCELLANEOUS	11.1%
SUPPLIES	4.8%
CELL PHONE	4.5%
CAR RENTAL	4.2%
GROCERY	2.2%
SHIPPING	2.0%
PARKING	0.8%
TOLLS	0.5%

*Ride hailing includes taxis and sharing economy vendors.

Percent of total annual company travel and entertainment receipts by expense category based on more than 50 million receipts and expenses processed by the Certify system in 2018.

AVERAGE TRANSACTION COST BY EXPENSE CATEGORY

With seven out of ten categories seeing an increase in average expense costs, organizations grappled with higher T&E spend in 2018. That said, the average costs for ride hailing, airfare, and car rentals all came down.

Category	2018 Average Expense Cost	Change from 2017
MEALS	\$32.08	+
RIDE HAILING*	\$24.26	-
AIRFARE	\$277.65	-
HOTEL	\$264.46	+
FUEL	\$36.86	+
MISCELLANEOUS	\$120.30	-
SUPPLIES	\$115.32	+
CELL PHONE	\$91.86	-
CAR RENTAL	\$192.99	-
GROCERY	\$70.78	+
SHIPPING	\$132.58	+
PARKING	\$37.04	-
TOLLS	\$45.98	+

*Ride hailing includes taxis and sharing economy vendors.

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MOST EXPENSED VENDORS OVERALL

Digital disruption continued in 2018 with brands such as Uber, Amazon, and Lyft jostling into position in the top ten most expensed vendors. Business travelers' continued reliance on ride hailing vendors kept Uber in the number one spot with 11% of all transactions.

Vendor	2018 Expense Percentage
UBER	11.0%
STARBUCKS	4.1%
AMAZON	4.0%
DELTA	3.6%
AMERICAN AIRLINES	3.4%
LYFT	2.8%
SOUTHWEST AIRLINES	2.8%
UNITED AIRLINES	2.7%
WALMART	2.7%
SHELL	2.5%

MOST EXPENSED BRANDS YEAR-OVER-YEAR COMPARISON

Vendor	2017 Expense Percentage
UBER	8.7%
STARBUCKS	4.2%
DELTA	3.8%
AMAZON	3.6%
AMERICAN AIRLINES	3.5%
SOUTHWEST AIRLINES	2.8%
WALMART	2.7%
UNITED AIRLINES	2.7%
SHELL	2.6%
MCDONALD'S	2.4%

MOST EXPENSED VENDORS BY CATEGORY

The most expensed brands in 2018 remain unchanged from our 2017 report, holding onto their lead category positions for meals, hotel, car rental, ride hailing, and airfare.

Meals	STARBUCKS	23.4%
Hotel	HAMPTON INN	14.9%
Car Rental	NATIONAL CAR RENTAL	36.2%
Ride Hailing	UBER	73.0%
Airfare	DELTA	22.5%

THE BRANDS BUSINESS TRAVELERS LOVE MOST

Consumer-focused and digital brands took top marks in user ratings in 2018, showcasing the importance of delivering exceptional experiences.

Meals	CHICK-FIL-A	4.6
Hotel	MARRIOTT	4.4
Car Rental	NATIONAL CAR RENTAL	4.4
Ride Hailing	LYFT	4.7
Airfare	JETBLUE	4.6

*Average rating represents the average 1 through 5 star rating for all expenses for each vendor, with 5 stars being the highest rating and 1 being the lowest.

Vendor	2016 Expense Percentage
UBER	6.3%
STARBUCKS	4.4%
DELTA	4.1%
AMERICAN AIRLINES	3.6%
AMAZON	3.0%
SOUTHWEST AIRLINES	2.9%
SHELL	2.7%
UNITED AIRLINES	2.7%
MCDONALD'S	2.5%
WALMART	2.4%

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RIDE HAILING INDUSTRY TRENDS

The industry shake-up in 2015—led by ride hailing pioneer Uber—fundamentally changed the way we travel for business and pleasure. As business travelers and consumers continued to place a premium on convenience in 2018, ride hailing companies grew.

Top Ride Hailing Brands		Average Cost Per Ride*		Average User Rating	
UBER	72.9%	TAXI	\$33.35	LYFT	4.7
LYFT	18.9%	UBER	\$25.88	UBER	4.5
TAXI	8.3%	LYFT	\$24.50	TAXI	4.0

*Average cost may or may not include tips.

FOOD DELIVERY

Another signal of shifting business traveler preferences is the gravitation to digital brands that provide the convenience of a warm meal delivered right to one's hotel or office. The category has seen a 118% year-over-year growth compared with 2017.

Top Five Brands		Average Cost Per Expense		Average User Rating	
GRUBHUB	35.9%	DOORDASH	\$72.32	SEAMLESS	4.8
UBER EATS	25.3%	SEAMLESS	\$69.06	UBER EATS	4.7
DOORDASH	20.9%	GRUBHUB	\$64.26	DOORDASH	4.5
POSTMATES	10.7%	POSTMATES	\$58.79	POSTMATES	4.4
SEAMLESS	7.2%	UBER EATS	\$35.40	GRUBHUB	4.3

*Average rating represents the average 1 through 5 star rating for all expenses for each vendor, with 5 stars being the highest rating and 1 being the lowest.

Want to learn more about the Certify SpendSmart™ Report?

Contact Certify at 1-888-925-0510 or visit www.certify.com/CertifySpendSmartReport.aspx

About Certify

Certify is the leading online spend management solution for companies of all sizes. Organizations worldwide book travel, complete expense reports, and digitize the procure-to-pay process quickly and easily using Certify cloud and mobile applications. For more information about Certify, please call 1-207-773-6100 or visit www.certify.com.

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