The art of data storytelling for travel management



SAP Concur



A trip from numbers to narrative

You can see the problem from a mile away: The endless drifts of data your travel program generates. Every booking, each reimbursement, and all those itineraries leave a digital trail literally winding around the globe.

That data is essential, of course, but the numbers themselves don't tell your program's full story. More reports don't add more meaning. Your peers and your C-suite don't want to sift through the digits, they want to see how travel drives value—how it influences critical business results, like cost control, traveler wellbeing, sustainability, and stable growth.

That's why leading travel managers are turning reporting into storytelling.

> "You can't get anything done in this world without data—and the stories you build from them. You absolutely need to be able to defend your metrics, your performance, and your company's performance with data-driven stories."
>
> ***—Jason Grunin, Principal Value Advisor, SAP Concur***

Data storytelling transforms raw information into influence. It connects insights to business goals, builds trust across departments, and shows leadership teams that travel is far more than a cost center—it's a performance lever.

This guide will give you the steps to get there. Read on, and you'll learn to:

- **Build a foundation of complete, reliable data.**
- **Shape clear, credible stories that resonate with stakeholders.**
- **Use those stories to drive action and strategy.**

Whether you're new to travel management or a seasoned program leader, this is your playbook for moving from metrics to meaning and measurable impact.

Travel managers are moving away from the day-to-day details of every trip to focus more on big-picture thinking.

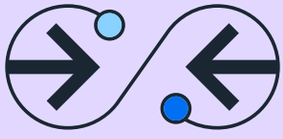
54% of travel managers say their company evaluates travel strategy at the c-suite or board level.

50% say that their company attaches specific KPI's to the travel budget.

Source:
2025 Deloitte Corporate Travel Study



Part 1: The foundation—creating the story behind the numbers



> "You have to compare apples to apples. You have to make sure that what you're talking about is based on the same measurement that any other data set is comprised of. And you can't get there with disparate systems. That's why integrated travel, expense and payments are so important. You get one, consistent, uniform way of measuring what matters."
>
> ***—Jason Grunin, Principal Value Advisor, SAP Concur***

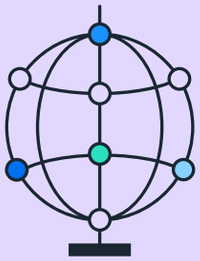
Build trust through complete, connected data

Every data story begins with credibility. If you or your audience can't trust the numbers—or if the numbers only tell half the story—your insights lose power before the conversation even begins. Sound familiar?

With many travel programs, bookings live in one tool, expenses in another, and payment data somewhere else entirely. To make matters worse, each system reports a slightly different truth, so you spend time reconciling discrepancies instead of acting on insight.

So how do you create a complete, reliable picture?

- Start with simplicity. Clean data begins at the source, and the fewer manual steps your travelers and finance team have to take, the better your travel and expense (T&E) data will be.
- Next, you'll want to bring every data source—travel, expense, and card—into one connected ecosystem. Because when all your information is unified, accuracy improves immediately. You'll uncover spend you didn't know you had, see patterns you didn't know existed, and eliminate the noise that leads to misinterpretation.



The solution: **Complete by SAP Concur and Amex GBT**

Complete revolutionizes business travel by unifying travel booking, servicing, and expensing into one, seamless, AI-powered experience—one that's effortless for employees and empowering for travel and finance leaders. Announced in October 2025, with new features rolling out through 2026, Complete will deliver:

Access to more than 600 airlines and two million properties by integrating the Amex GBT marketplace into the experience—providing travel programs with greater incentives and cost savings.

Expedited releases of new distribution capabilities (NDC) content—increasing content options, choice, and clarity of fares while improving compliance within existing travel policies.

Combined AI offerings trained on an unrivaled volume of travel data from Concur Travel & Expense and Amex GBT—using millions of trips and transactions to fine-tune experiences in near real-time.

Unified traveler support via an integrated chat agent—giving users a single, time-saving experience where they can manage their entire trip.

Learn more

When all your data works together, you'll be able to develop consistent categories, standardized metrics, and common definitions across travel, finance, and procurement stakeholders. That makes it easier for your people to work together—and working from the same version of the truth creates alignment while establishing your reports as a credible foundation for decision-making.

A few practical steps to follow as you connect your data:

- Examine what data you currently have, how it's classified, where it lives, and who has access to it.
- Integrate travel, expense, and payment feeds into a single platform.
- Standardize naming conventions and the units you'll use to measure the data, so finance, HR, and travel teams interpret results the same way.
- Schedule quarterly data-quality reviews to verify accuracy and completeness—and to catch trends or recurring errors.

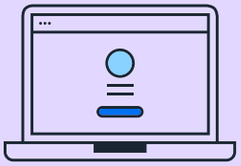
Why it matters: Data credibility is corporate currency. When your numbers are consistent and complete, cross-functional teams are on the same page, and your recommendations carry more weight in every conversation.

Define what matters

Once you have a solid data foundation, your next step is deciding which metrics deserve the most attention. Remember that every organization defines success differently, so determine specifically what your company wants to prioritize.

How? Meet with stakeholders across finance; procurement; compliance; tax; operations; human resources (HR); and environmental, social, and governance (ESG) to understand what they value most.

- What does finance need to know to build their forecasts, and what level of detail do they require?
- What do they care about when it comes to travelers meeting (or exceeding) their budgets?
- Does HR want to dig deeper into traveler satisfaction and wellbeing? How do they plan to align these travel-based metrics with their broader workforce wellbeing key performance indicators (KPIs)?
- And what carbon-tracking details do sustainability leaders require to meet regulatory requirements?



The solution: **Concur Intelligence**

Concur Intelligence gives you the power to showcase what matters most to you and to your stakeholders, making your program's value instantly visible. With turnkey dashboards and automated reporting, you can:

Share easy-to-understand data across teams, helping align finance, HR, travel and other leaders around the same priorities.

Schedule automated reports so leaders always see progress—no manual spreadsheet updates or cleanup required.

Organize data by department, traveler type, or region, predicting future spend/travel trends and highlighting the most valuable insights.

> "Insight is the bridge between data and action. It's not just information, it's influence—so instead of being a travel manager with a report, you're an advisor at the table."
>
> ***—Anne Delgado, Director Travel and Payments, SAP***

When you connect those priorities to your travel metrics, generic, surface-level reporting becomes strategic alignment.

What could those KPIs look like?

- Pre-trip and actual spend captured in T&E—to measure forecasting accuracy and visibility.
- Policy compliance rate—to measure adoption and cost control.
- Average cost per trip—to set efficiency benchmarks for budgeting.
- Savings from negotiated rates and discounts—to establish value and to stress the importance of using those negotiated rates.
- Sustainability metrics—to gauge CO_2 emissions per trip and to encourage rail vs. air booking.
- Traveler wellbeing information—to measure traveler experience and its impact on retention.

Why it matters: Metrics are only as strong as the goals they support. When you measure and prioritize what matters to leadership—and to your peers—you elevate travel from a transactional process or cost center to a strategic business contributor.

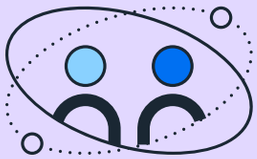
Translate information into insight

With reliable data and the right metrics in place, the next step is making sure everyone understands what the data is saying. Or to put it another way, humanizing the data through storytelling.

Your travel data is especially rich with stories waiting to be uncovered. For example:

- A sharp quarter-over-quarter increase in travel spend by one department may point to last-minute airfare and/or lodging booked for an event.
- Rising hotel costs in certain markets could spotlight the need for supplier renegotiations.
- Repeated change fees or unused tickets might signal that policy guidance isn't matching traveler preferences.

The more you connect these threads, the clearer your story becomes. And you're not just dishing out spend data—you're showing how travelers, processes, and policies interact to create value (or waste) within your program.



The solution: **Consultative Intelligence**

Use Consultative Intelligence to help uncover the stories hiding inside your data. By partnering with Concur analytics experts (who are, yes, actual people), you get extra eyes on the same data you use every day—empowering you to see what you might otherwise miss. This means you can:

Spot trends and anomalies that reveal new opportunities for cost control or traveler experience improvements.

Explore data through interactive, accessible dashboards and visualizations that replace complexity with context.

Collaborate with experts who specialize in interpreting patterns, benchmarking performance, and identifying which actions to take.

That clarity helps you proactively steer change before leadership asks you for explanations or requests a shift in direction.

When you can walk into a meeting and say, "Here's what's driving the trend, and here's how we fix it," you go from reporting results to setting the agenda.

Why it matters: Insight transforms your program from reactive to proactive. It builds credibility by showing that you understand the why behind the numbers, not just the what. And it gives your audience the confidence to trust your recommendations—because you're showing cause, effect, and opportunity, all in the same breath.

Part 1 wrap-up

When your data is complete, credible, and connected to business goals, it gives your insights real weight. That's how you earn trust, mine foresight from information, and set the stage for stories that inspire action.





Part 2: The story—communicating with context and clarity



Start with a clear framework

A strong data story gives shape and meaning to what you've uncovered—it connects metrics to results and paves a clear path to action. Think of it as a narrative framework:

- **Establish context**—set the stage for your story and explain why the topic matters now.
- **Share the challenge or the "what"**—the key question or issue the data helps answer.
- **Present the data**—the evidence and key data points, findings, or trends.
- **Define the action**—what was or will be done based on the insights.
- **Outline the impact or outcome**—the results or projected benefits.
- **Describe the future**—connect the story to broader goals or next steps.

> A good data story doesn't overwhelm with numbers—it distills them into meaning people can act on."
>
> ***—Shaun Healey, Senior Presales Specialist & Travel Expert, SAP Concur***



> The same data can tell a dozen different stories to leaders all across the company. The travel manager's job is to connect those dots—and make the story matter to each of them."
>
> ***—Anne Delgado, Director Travel and Payments, SAP***

Every story should reveal a specific truth about your program and its impact on the overall business—it must be something leaders can grasp in seconds and remember long after the meeting. So start simple: Choose one insight that truly matters, then frame it through impact. For example:

"By identifying off-channel bookings, **we uncovered a 12% savings opportunity and improved visibility for duty of care.** When we traced the behavior, we discovered many travelers were booking directly to secure better loyalty perks—unaware they were forfeiting negotiated rates and risk coverage. After improving communication, offering more engagement channels, and clearly explaining the importance of booking through the approved online booking tool (OBT), **in-policy bookings increased by 18%**.

The story presents far more than data—it articulates the context, the stakes, and the right direction.

Why it matters: Facts alone don't drive change—understanding does. A clear, credible story elevates your analysis into a shared vision for improvement, helping leadership see what's possible and why it matters.

Know your audience

Every audience sees the story through a different lens, and the more you tailor your message to those audiences, the more persuasive your insights will become. Here are a few examples:

- **Finance cares about return on investment (ROI), predictability, and risk,** so highlight cost control, trend forecasting, and strategic outcomes. 53% of CFOs also believe travel managers should do more on traveler safety, while 51% said travel managers should do more to keep travelers happy.[1] This means you'll also want to highlight data stories about duty of care and retention when speaking to finance leaders.
- **HR leaders are most concerned with building critical skills and competencies,** improving employee retention and engagement, and ensuring their people strategies align with business goals. Other key priorities to consider as you draft your story include change management and fostering a positive organizational culture.

[1] 7th Annual SAP Concur Global Business Travel Research Report



> Data alone is persuasive, but it's not memorable. When you visualize it clearly and pair it with a real example—an employee, a team, a result—you give people something they can see, feel, and remember long after the slide is gone."
>
> ***—Jason Grunin, Principal Value Delivery Consultant Advisor, SAP Concur***

- **Suppliers respond to transparency and value.** Total spend is key, as well as incremental revenue (like meals and amenities), to strengthening your negotiations.

It helps to think of each audience as a stakeholder in your story: The CFO needs confidence, finance needs collaboration, and suppliers need partnership. Your job is to connect each of them to the data in ways that move their priorities forward.

Why it matters: A single story told multiple ways can transform how people perceive your program. Tailoring your narrative creates connection, trust, and alignment across the organization.

Add visuals to amplify impact

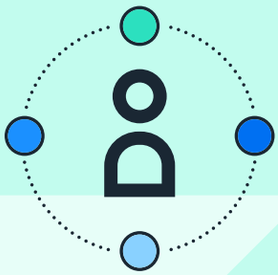
As with any good story, pictures help bring it to life. Data storytelling naturally lends itself to "showing" more than "telling," so use visuals to your advantage. Charts, graphs, infographics, even (and perhaps especially) images you create in the audience's mind—simplify complexity, and real examples bring your data to life.

Use visual impact to highlight change:

- Show trends over time to demonstrate progress or risk.
- Use side-by-side comparisons to illustrate cause and effect.
- Pair key visuals with short narrative insights to anchor interpretation.

You're creating clarity and meaning here, and you'll want to combine that clarity with human details, like a traveler quote, customer anecdote, or department-level win. Because when the numbers jump off the page, the story sticks.

Why it matters: Visuals and stories do together what neither can do alone: They simplify the message and make it memorable. And people remember impact, not numbers on a spreadsheet.



> When people see their unique priorities reflected in the same data, alignment stops being an aspiration and becomes the way decisions get made."
>
> ***—Anne Delgado, Director Travel and Payments, SAP***



Create shared understanding

Even the strongest data story loses impact if your stakeholders don't see the same picture. And if travel, finance, and procurement leaders interpret data differently, collaboration breaks down. It takes shared visibility and open conversations to bring them back into sync.

Earlier in this guide, you learned about tailoring your message to each audience. Here, you'll see the importance of helping each group find their place within the same, connected narrative. Because when finance, HR, and travel all interpret T&E data through a shared lens, parallel conversations begin to transform into collective understanding and action.

Building this shared understanding takes a commitment to transparency and repetition.

- Keep KPIs and dashboards in sync so each stakeholder tracks success the same way.
- Be consistent with terms, tactics, and techniques in every report and in all communications.
- Be sure to meet with your teams regularly to dig deeper than the data—discussing how to improve and refine your reports as well as examining trends and context together.

When you and your stakeholders have a shared understanding of your travel-data story, it becomes a business conversation, not just another update. It's an effective way to bridge departments, break down silos, and step forward.

Why it matters: Shared understanding creates momentum. It ensures that every stakeholder sees the story through their individual lens, and it all ties back to a single source of truth. When everyone is working from the same foundation, your travel program becomes a model for how data can unify the business and move closer to your shared goals.

Part 2 wrap-up

A well-told story makes data, well, unforgettable. Allow your travel and expense data to become a leadership tool by connecting insight to meanings—and meanings to the outcomes that matter most—then you'll move people to act.



Part 3: The inspiration—using stories to shape strategy



> Data doesn't change minds, but strong stories can. When you translate numbers into impact and tie that impact to business results, decisions follow naturally."
>
> *—Jason Grunin, Principal Value Delivery Consultant Advisor, SAP Concur*

Influence decisions and drive change

Insight earns attention, but influence earns results. Strong stories can't stop with describing performance—they need to demonstrate to leadership what action looks like. These stories connect travel behavior to business goals, highlight opportunities, and make outcomes measurable. For example, with the right story, you can:

- Show how improved policy compliance frees budget for additional client-facing trips.
- Prove that sustainable travel choices support ESG targets and reduced costs.
- Use trend data to guide supplier negotiations and strengthen long-term value.

Why it matters: When you show clear cause and effect, you're not just presenting data, you're steering direction. At that point, leadership doesn't have to wait for updates—they start coming to you for answers.

> When insight shows up in the workflow—as travelers are making decisions—it's not a number or more analysis, it's guidance. A nudge towards the best choices and behaviors. That's when data starts to shape actions before they happen, instead of trying to fix things after they occur."
>
> ***—Mimi Shen, Senior Director Travel AI, SAP Concur***



The solutions:
Booking Agent

Simplify travel with this conversational booking tool. Built with Joule AI and policy-aware personalization, it generates compliant itineraries that meet individual preferences and company rules. It also offers real-time cost breakdowns and estimates, ensuring transparency and easier expense management.

Request Assistant

Take the guesswork out of travel requests with generative AI and Concur benchmark data—delivering accurate cost estimates for flights, hotels, trains, car rentals, taxis, and meals. And because every estimate automatically aligns with policy, employees can plan with confidence and your business can stay on budget.

WalkMe

Get step-by-step, in-app guidance directly within the Concur interface. This makes it easier for users to learn and engage with the platform, helping businesses boost adoption, ensure policy compliance, streamline workflows, increase overall productivity and efficiency, and reach ROI faster.

Embed insights into everyday choices

You have strong, meaningful data stories, so don't let them get stuck in presentations and spreadsheets. Bring them to life in your everyday workflows. Make insight part of daily decisions, and your program will continue to improve. And you can stop reacting to fire drills.

Embedding data into everyday travel management can mean:

- Pre-trip booking requests using Gen AI that flag high-cost or high-risk trips before they happen.
- AI-driven booking agent guides travelers through personalized, policy-aware recommendations.
- Real-time education for new employees and infrequent travelers directly within the app using contextual pop-ups, guided walk-throughs, and on-demand information.

These examples make data meaningful in real time, which teaches the system (and your people) how to make smarter choices.

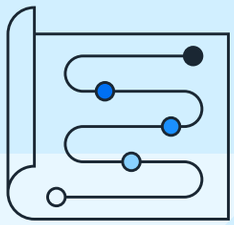
Why it matters: Behavioral change is the true measure of program maturity. The more data and insights are embedded into your daily processes, the more they drive action and the less effort it takes to sustain and improve compliance, cost control, and value.

Measure progress and refine the story

Your story is a good one, so don't give it an ending.

The lasting impact of a smart data story comes from how you keep it alive and evolving—revisiting results, sharing progress, and refining the message as your program grows. Build more meaning into your story by:

- Revising your key metrics each quarter to measure progress.
- Highlighting improvements resulting from your recommendations.
- Capturing new questions coming out of the data, so you can steer the next cycle of analysis.



> A good data story doesn't remain static—it keeps iterating and shaping actions to continuously optimize. Every new metric, every insight, every updated action is a chapter in how your program moves the business forward."
>
> ***—Mimi Shen, Senior Director Travel AI, SAP Concur***

Use this process to create a rhythm for your reporting, so it becomes an ongoing, interactive dialogue across the business.

Why it matters: Reinforcing your story keeps it relevant and strengthens your credibility over time. When you regularly connect results back to insight, your value not only becomes visible, you begin leading by example and others can adopt your best practices. After that, leadership starts to expect your guidance as part of the business-planning process.

Part 3 wrap-up

Strong data stories do more than report the numbers. They guide decisions, embed insight into everyday actions, and create measurable impact. By keeping your story active and evolving, you increase influence and make your program an essential driver of business strategy.



It’s your data story, tell it well

You started with endless data—numbers scattered across systems, insights buried in chaos, and leaders asking for meaning.

Now the story is clear. The signals visible. Every booking, every expense, and every traveler movement connects in one place, telling a story that moves your business ahead. With complete, credible data and a shared understanding across teams, your data story informs decisions, strengthens alignment, and demonstrates value every day.

So instead of delivering another report, you’re delivering relevance. You’re giving your business a way to step forward, not just a reason to.

Data helps you better understand traveler behavior. To better understand your travelers, read this guide.

For more on how to drive strategy and level up both your program and approach, check out these tips.

SAP Concur



enUS (25/11)

© 2025 SAP SE or an SAP affiliate company. All rights reserved.
See Legal Notice on www.sap.com/legal-notice for use terms, disclaimers, disclosures, or restrictions related to this material.