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Travel Association

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# GBTA Business Travel Outlook Poll Q1 Results

January 31, 2023



# Methodology

**An online flash poll was conducted of GBTA members and non-members worldwide, including corporate travel managers and travel suppliers**

- Data collection was conducted January 16-26, 2023
- An email invitation was sent to 19,101 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's Daily News Brief sent to travel professionals worldwide
- In total, 637 business travel professionals responded
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number





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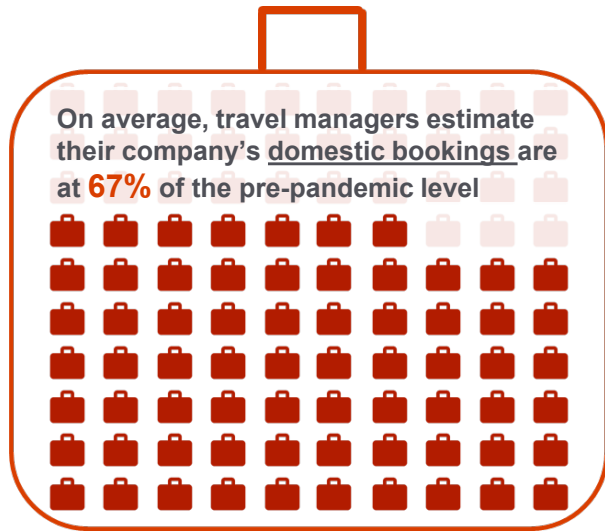
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# The State of Global Business Travel



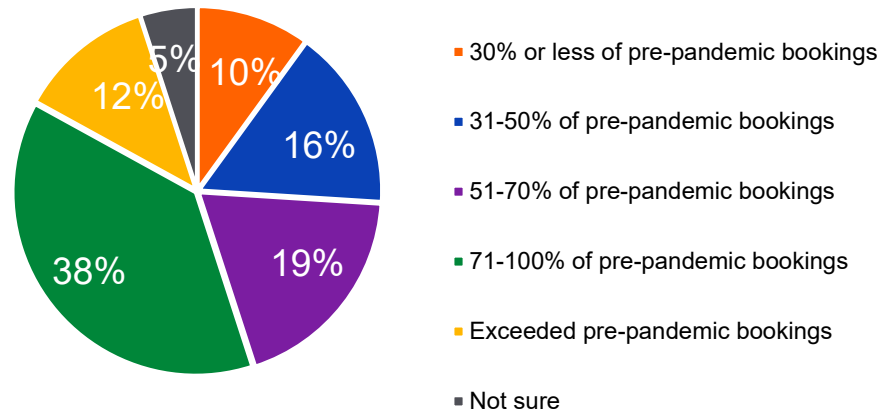
# The State of Domestic Business Travel

## Domestic Business Travel Leads the Recovery



Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Thinking about domestic bookings, are travel programs currently at...?



The business travel recovery continues to move forward.

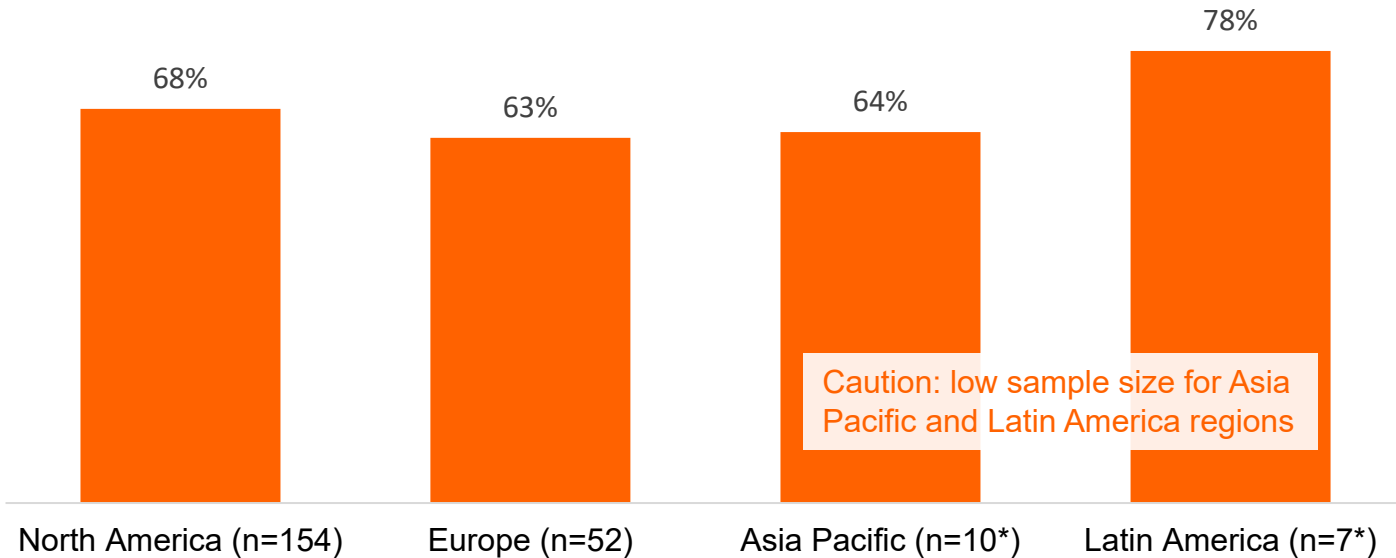
On average, travel managers estimate their company's domestic bookings are at 67% of the pre-pandemic level. This is up from 63% in October 2022.

Q. Thinking about your company's current domestic business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine. Note: Question only displayed to travel buyers/procurement professionals (n=224).



# The State of Domestic Business Travel (Cont.)

Thinking about domestic bookings, are travel programs currently at...?  
*estimated averages by region*



Q. Thinking about your company's current domestic business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

Note: Question only displayed to travel managers/procurement professionals

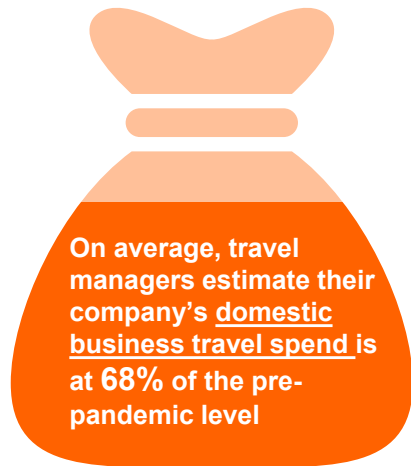
\*indicates small sample size for travel buyers in Asia Pacific and Latin America

**Europe's domestic recovery slightly lags.** On average, Europe-based travel managers estimate their company's domestic business travel bookings have recovered to 63% of the pre-pandemic level.

This is slightly lower than the estimated average for North America (68%). However, Europe has seen stronger recovery of international bookings (see p. 9)

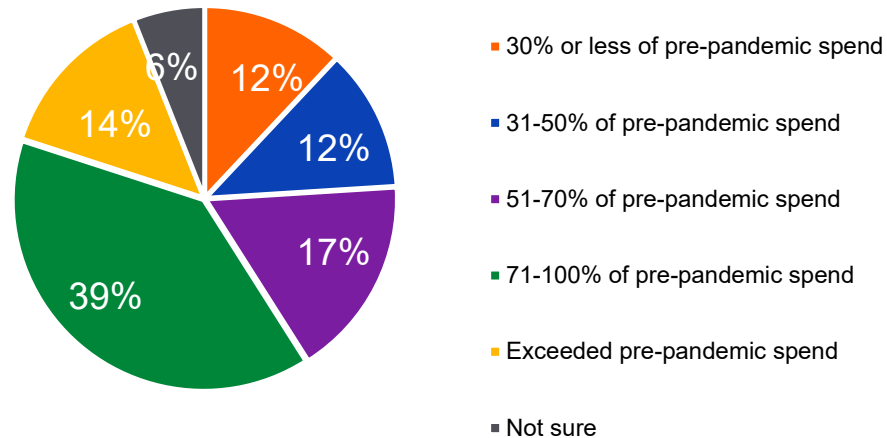
# The State of Domestic Business Travel (Cont.)

## Domestic Business Travel Leads the Recovery



Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Thinking about domestic spend, are travel programs currently at...?



**Domestic spend recovers at a similar pace as bookings.** On average, travel managers estimate their company's domestic business travel spend has recovered to 68% of the pre-pandemic level.

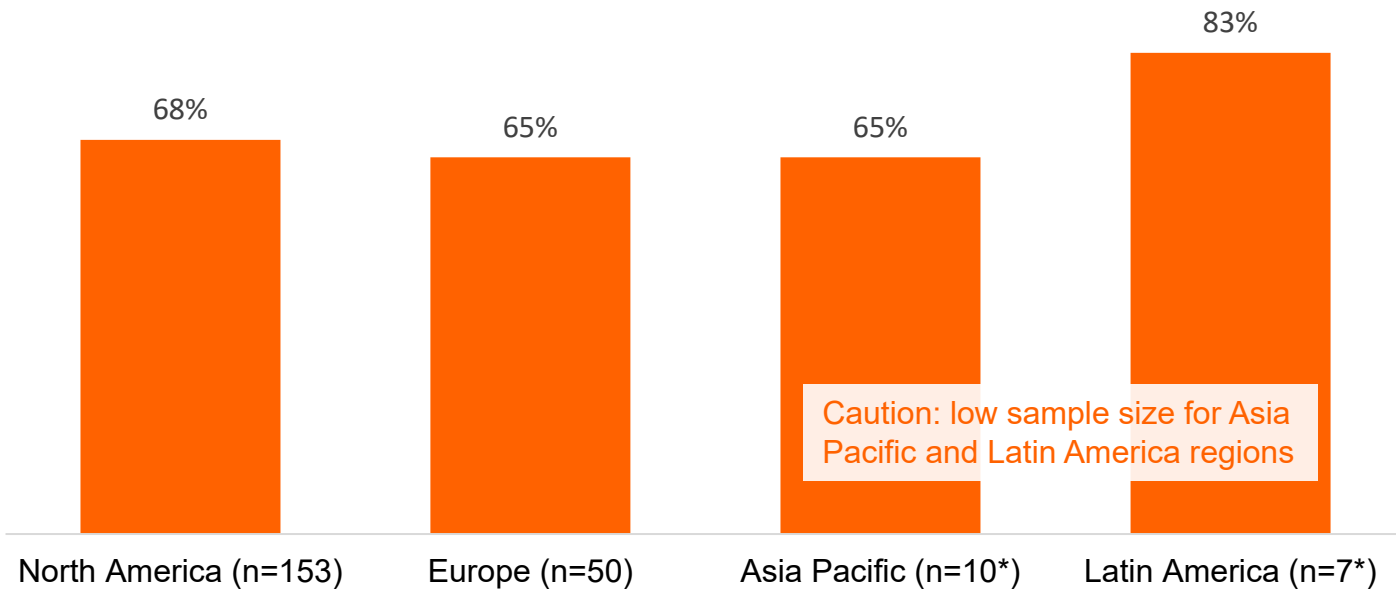
Q. Thinking about your company's current domestic business travel spend, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

Note: Question only displayed to travel buyers/procurement professionals (n=235).

# The State of Domestic Business Travel (Cont.)

Thinking about domestic spend, are travel programs currently at...?

*estimated averages by region*



**Domestic spend recovers across the world.** On average, North America and Europe-based travel buyers estimate their company's business travel spend has recovered to about two-thirds of the pre-pandemic level.

Q. Thinking about your company's current domestic business travel spend, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

Note: Question only displayed to travel managers/procurement professionals

\*indicates small sample size for travel buyers in Asia Pacific and Latin America

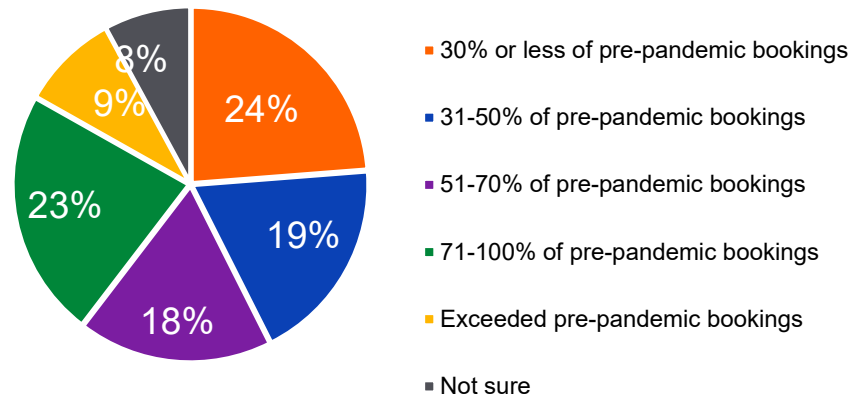
# The State of International Travel

## International Business Travel Continues to Gain Ground



**Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges**

Thinking about international bookings, are travel programs currently at...?



Q. Thinking about your company's current international business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine. Note: Question only displayed to travel buyers/procurement professionals (n=236).**

**International business travel continues to slowly gain ground.** Last January, international business travel remained virtually at a standstill with almost three in five travel managers (59%) saying their company “never” or “rarely” allowed these trips. In the ensuing months, these trips made a strong comeback.

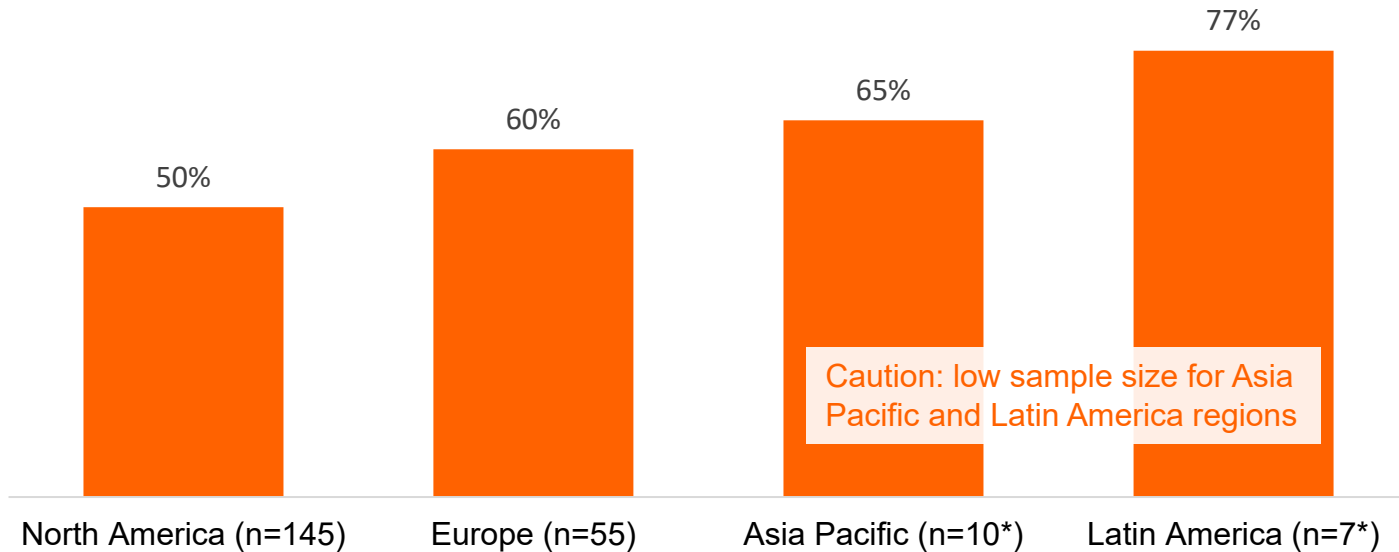
In October 2022, travel managers estimated their company's international bookings had recovered to **50%** of the pre-pandemic level on average. Since then, the recovery has slowed – but continues to trend in a positive direction. On average, travel managers currently estimate their company's international bookings have recovered to **54%** of the pre-pandemic level.



# The State of International Business Travel (Cont.)

Thinking about international bookings, are travel programs currently at...?

*estimated averages by region*



Q. Thinking about your company's current international business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

Note: Question only displayed to travel managers/procurement professionals

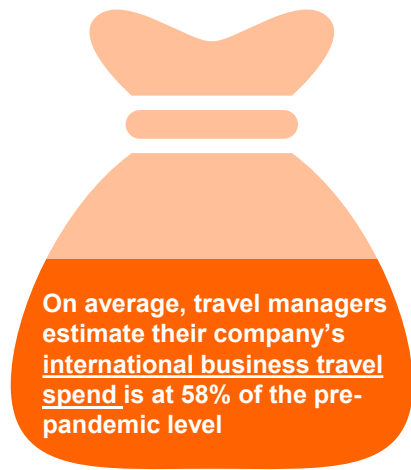
\*indicates small sample size for travel buyers in Asia Pacific and Latin America

**Europe's international recovery outpaces North America.** While Europe-based travel managers report less recovery in domestic bookings (see slide 5), compared to their North American counterparts, they report more recovery in international bookings.

On average, Europe-based respondents estimate their company's international bookings have recovered to 60% of their pre-pandemic level. This is higher than the estimated average for North America (50%).

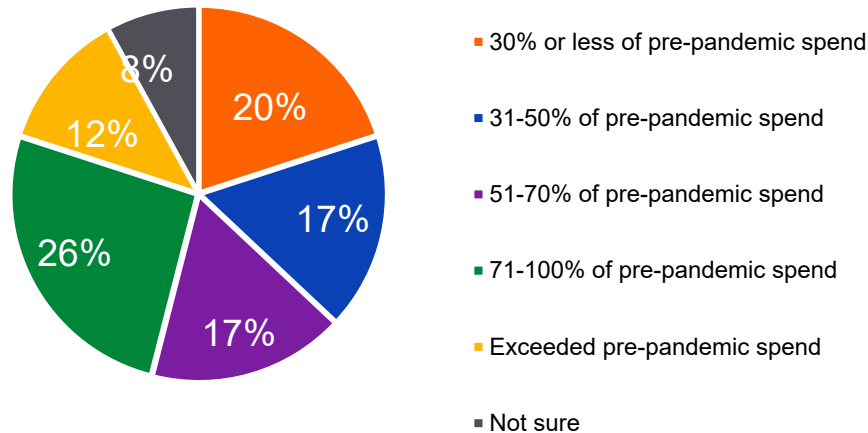
# The State of International Business Travel (Cont.)

## International Business Travel Continues to Gain Ground



Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Thinking about international spend, are travel programs currently at...?



**International spend outpaces bookings.** On average, travel managers estimate their company's international business travel spend has recovered to 58% of the pre-pandemic level.

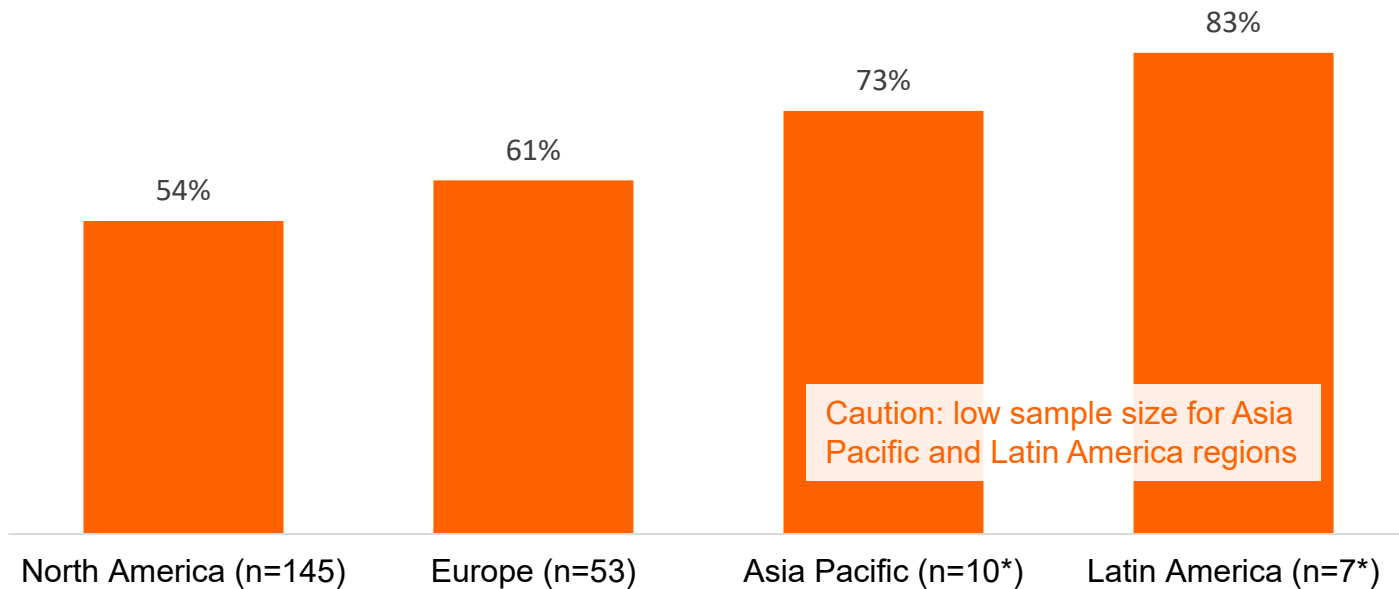
This is higher than the estimated recovery level for international bookings (54%) which suggests that companies are spending more per international trip than they did before the pandemic.

Q. Thinking about your company's current international business travel spend, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine.** Note: Question only displayed to travel buyers/procurement professionals (n=235).

# The State of International Business Travel (Cont.)

Thinking about international spend, are travel programs currently at...?

*estimated averages by region*



Q. Thinking about your company's current international business travel spend, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

Note: Question only displayed to travel managers/procurement professionals

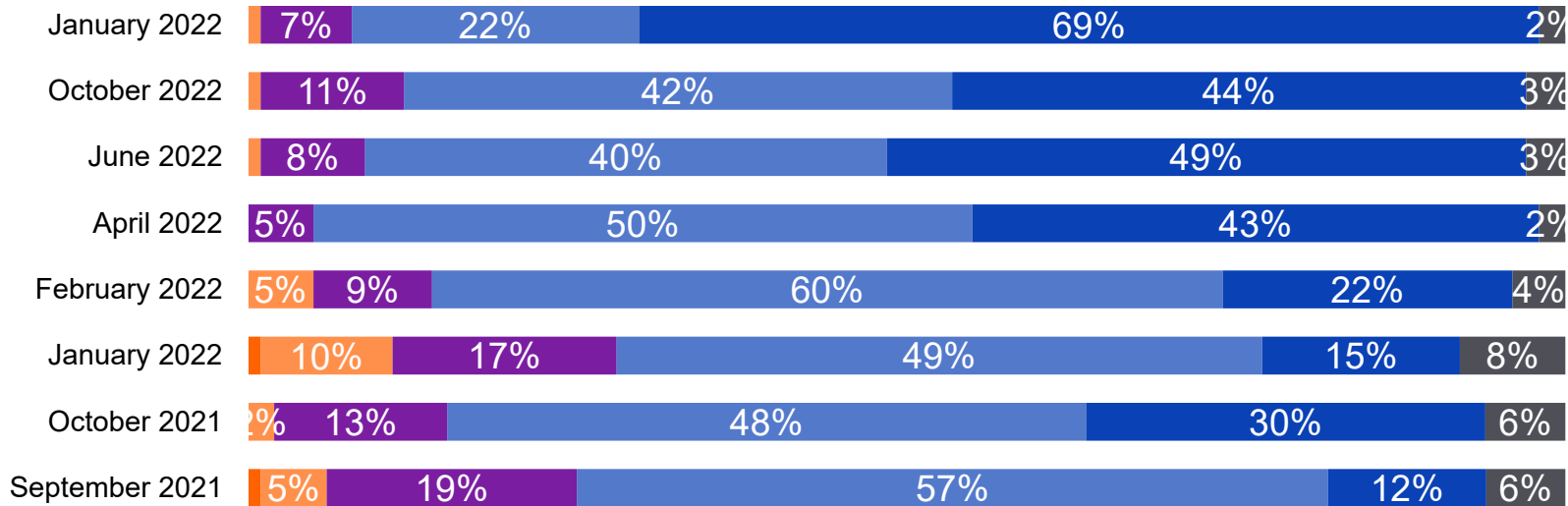
\*indicates small sample size for travel buyers in Asia Pacific and Latin America

On average, Europe-based respondents estimate their company's **international** business travel spend has recovered to 61% of the pre-pandemic level. This compares to 54% in North America.

# Are Employees Willing to Travel For Work?

## Do travel managers think their company's employees are willing to travel?

■ Not willing at all 
 ■ Not willing 
 ■ Neither willing nor unwilling 
 ■ Somewhat willing 
 ■ Very willing 
 ■ Not sure



Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=191-448)

**Willingness to travel soars.** Nine in 10 travel buyers (91%) say their company's employees are at least somewhat willing to travel for work in the current environment.

While this is similar to the figure obtained in October 2022 (86%), there has been a dramatic increase in the share who feel their employees are "very willing" to travel. Almost seven in 10 travel managers (69%) say their company's employees are very willing to travel (compared to 44% in October).



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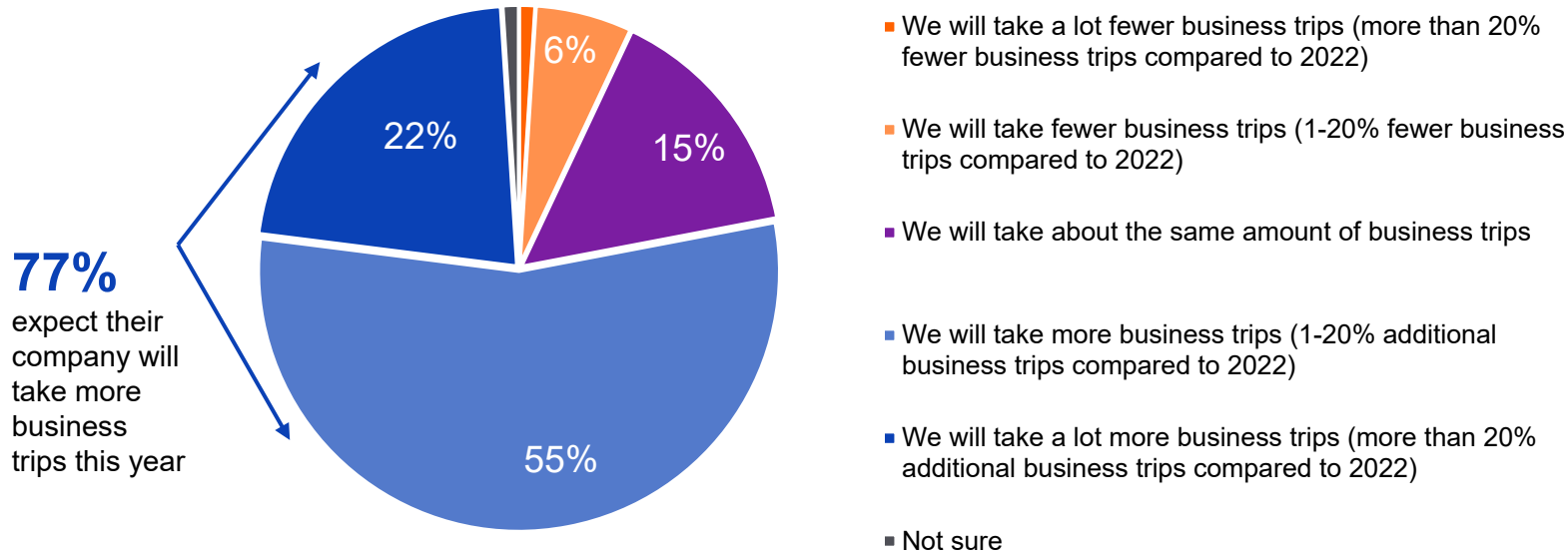
# Key Highlights





# Travel Managers Expect More Trips This Year

Will travel programs engage in more or less business travel this year?  
*travel buyers/procurement professionals only*



**77%**  
expect their company will take more business trips this year

- We will take a lot fewer business trips (more than 20% fewer business trips compared to 2022)
- We will take fewer business trips (1-20% fewer business trips compared to 2022)
- We will take about the same amount of business trips
- We will take more business trips (1-20% additional business trips compared to 2022)
- We will take a lot more business trips (more than 20% additional business trips compared to 2022)
- Not sure

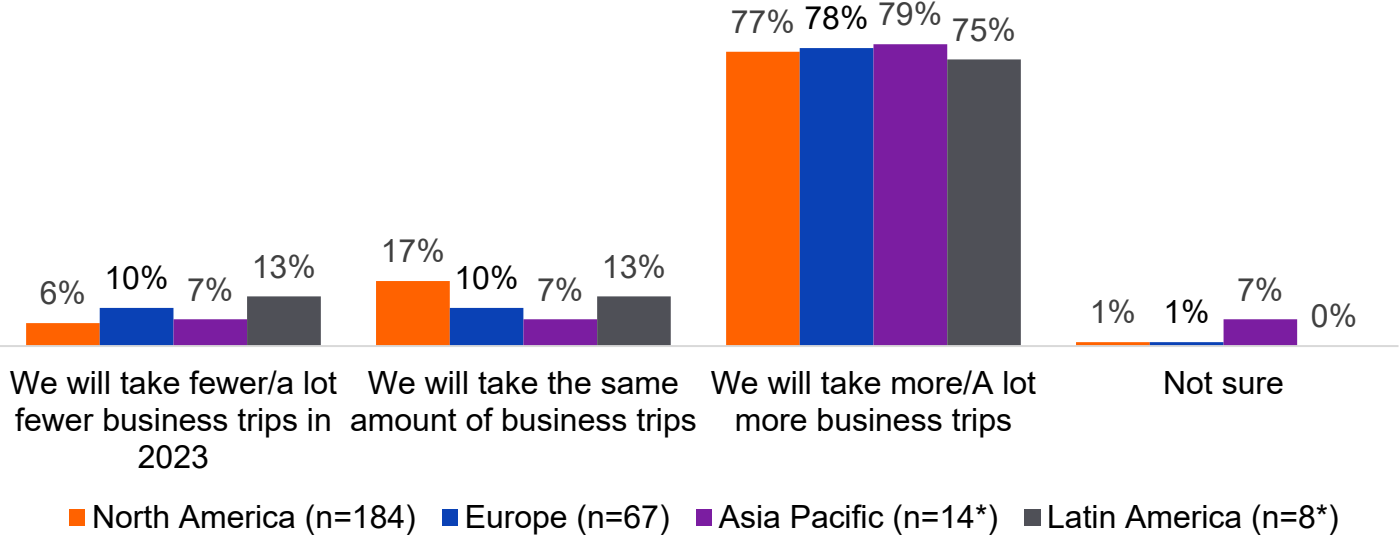
Q. This year (2023), do you expect your company will engage in more or less business travel than it did last year? (n=275)

Business leaders widely anticipate a recession this year. **However, travel managers expect more business travel.**

Three-quarters of travel managers (77%) expect their company will take more business trips this year than it did last year. Only 7% expect their company will take fewer trips.

# Regardless of Region, Travel Managers Expect Their Company Will Take More Business Trips

**Do travel managers expect their company will engage in more or less business travel this year?**  
*travel managers only*

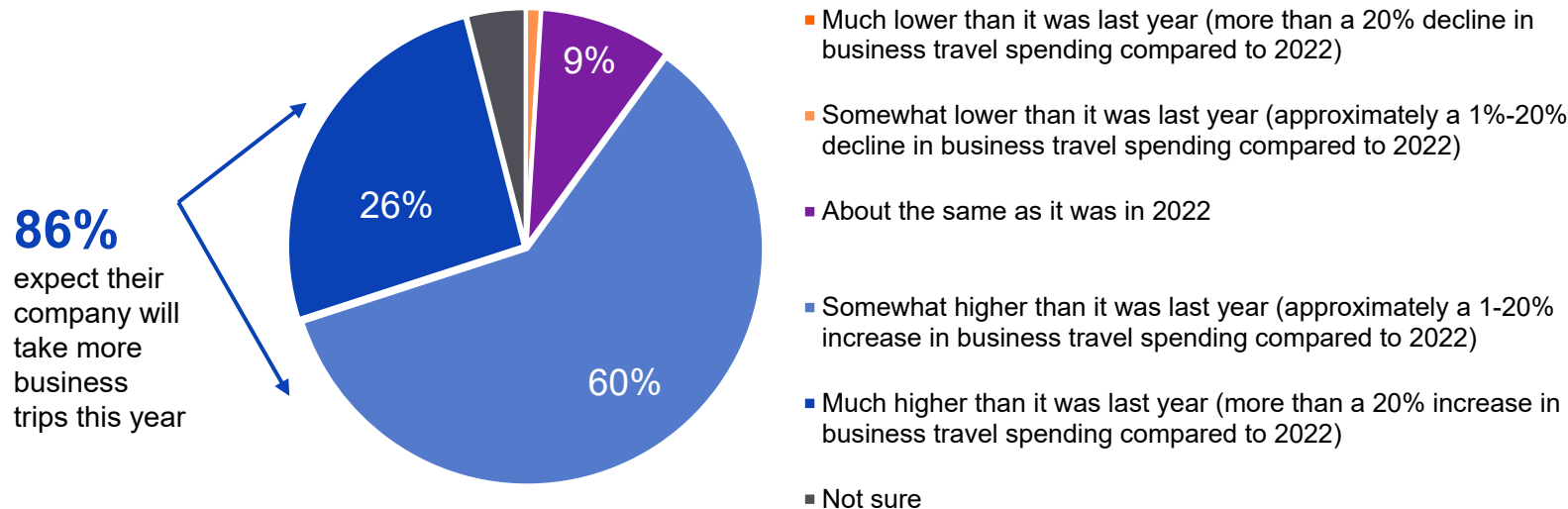


**Regardless of region, travel managers expect their company will take more business trips this year.** More than three-quarters of North American and European travel managers expect their company will take more trips.

Q. This year (2023), do you expect your company will engage in more or less business travel than it did last year?  
 Note: Question only displayed to travel managers/procurement professionals  
 \*indicates small sample size for travel buyers in Asia Pacific and Latin America

# Travel Suppliers and TMCs Are Optimistic About Business This Year

Do travel supplier and TMC employees expect business travel spending by corporate clients will be...?  
*travel supplier/TMC employees only*



**Travel suppliers are optimistic about business travel.** Almost nine in 10 respondents (86%) who work for a supplier or TMC expect spending by their corporate clients will be higher this year. This includes one-quarter (26%) who expect spending will be much higher.

Q. Which of the following best describes your expectations for next year (2023) for your company's business travel?

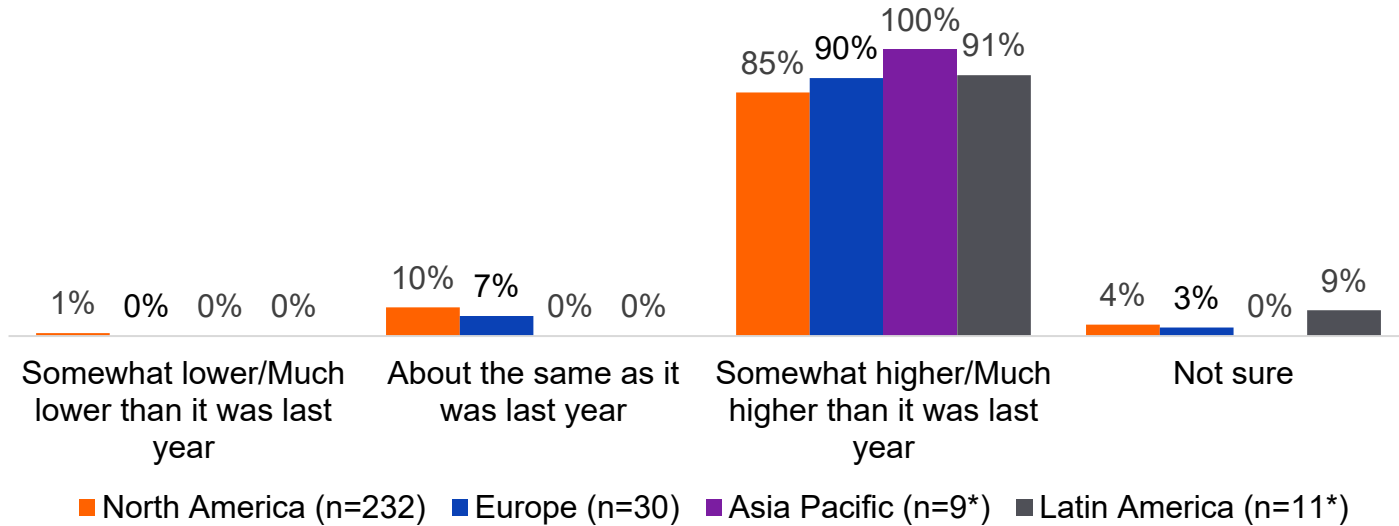
Note: Question only displayed to travel managers/procurement professionals (n=283)

\*indicates small sample size for North America-based travel managers (n<30)

# Regardless of Region, Travel Suppliers Are Optimistic About This Year

Do travel supplier/TMC employees expect business travel spend by corporate customers to be higher or lower than it was last year?

*supplier/TMC employees only*



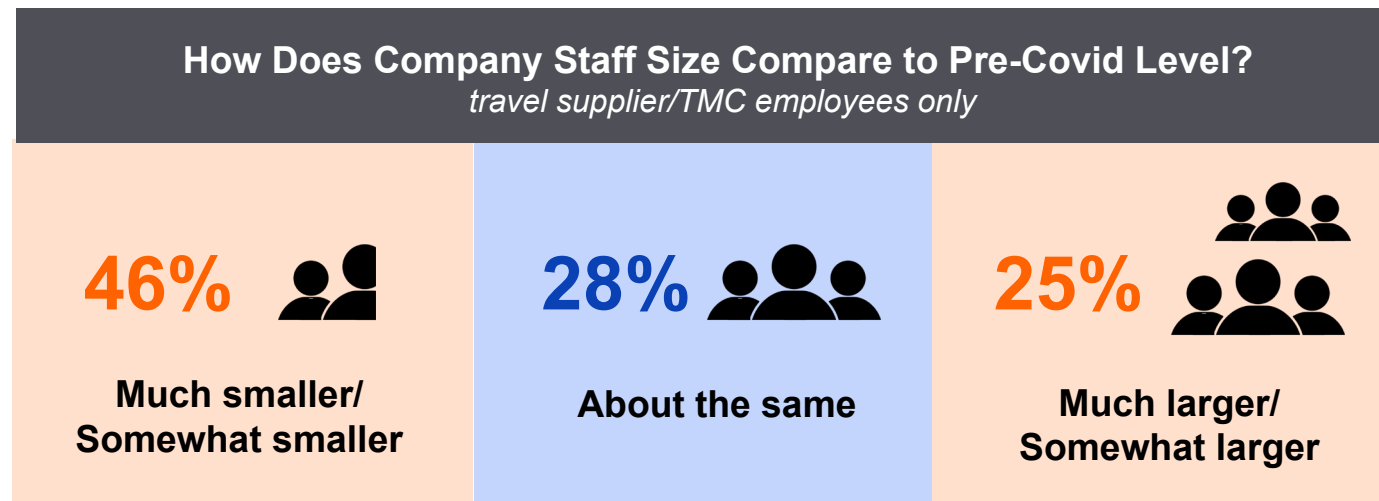
Regardless of region, travel suppliers expect more business from corporate customers this year.

Q. This year (2023), do you expect your company will engage in more or less business travel than it did last year?

Note: Question only displayed to travel managers/procurement professionals

\*indicates small sample size for travel buyers in Asia Pacific and Latin America

# Almost Half of Travel Supplier/TMC Employees Say Their Company Has Fewer Staff Than It Did Pre-Pandemic



Q. Thinking about your company's staff size, is it larger or smaller than it was pre-pandemic (2019)?

**Note: Question only displayed to travel supplier/TMC employees (n=248)**

Travel suppliers and TMCs were forced to reduce staff during the pandemic. To this day, many of these companies have not fully re-staffed.

Almost half of travel supplier and TMC employees (46%) say their company's staff size is smaller than it was before the pandemic. This has led to concerns about quality of service and account management.



# Travel Suppliers and TMCs Expect to Add Staff This Year

Will your company's staff size increase or decrease in 2023?  
*travel supplier/travel management company professionals only*

■ Decrease a lot ■ Decrease somewhat ■ Remain the same ■ Increase somewhat ■ Increase a lot ■ Not sure

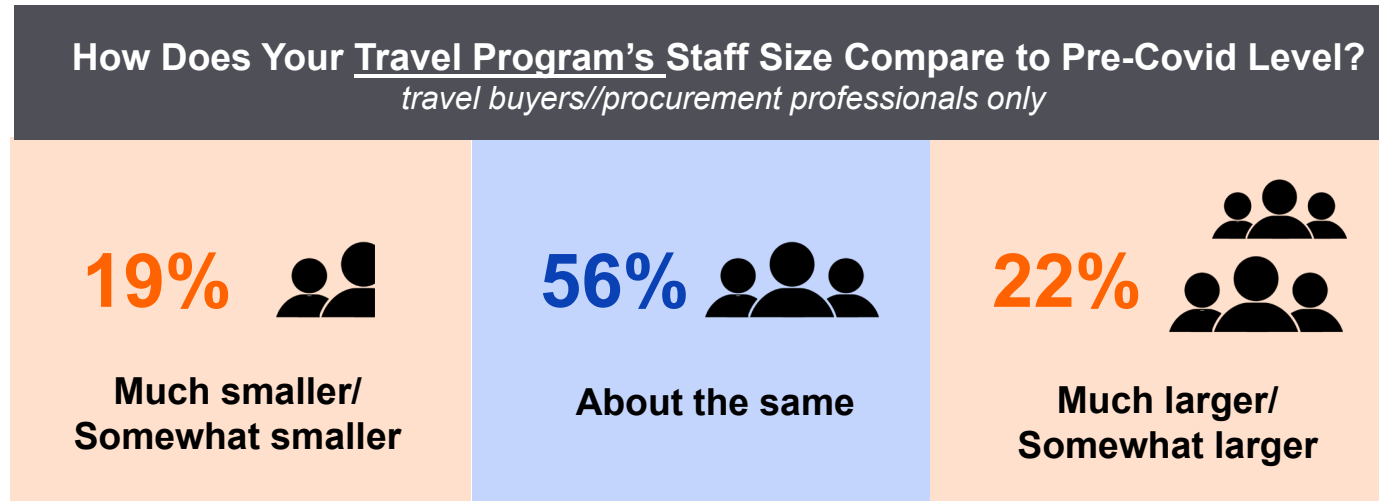


Despite recession fears, travel suppliers and travel management companies expect to add staff. More than two-thirds (65%) of respondents who work for a supplier or TMC expect their company's staff size will increase this year.

Q. This year (2023), do you expect your company will increase or decrease its overall staff size compared to 2022?

Note: Question only displayed to travel supplier/TMC employees (n=248)

# Travel Programs Largely Have Similar Staff Levels as They Did Pre-Pandemic



Note: 2% indicated "not sure" (not shown)

Q. Thinking about your travel program's staff size, is it larger or smaller than it was pre-pandemic (2019)?

Note: Question only displayed to travel buyers/procurement professionals (n=272)

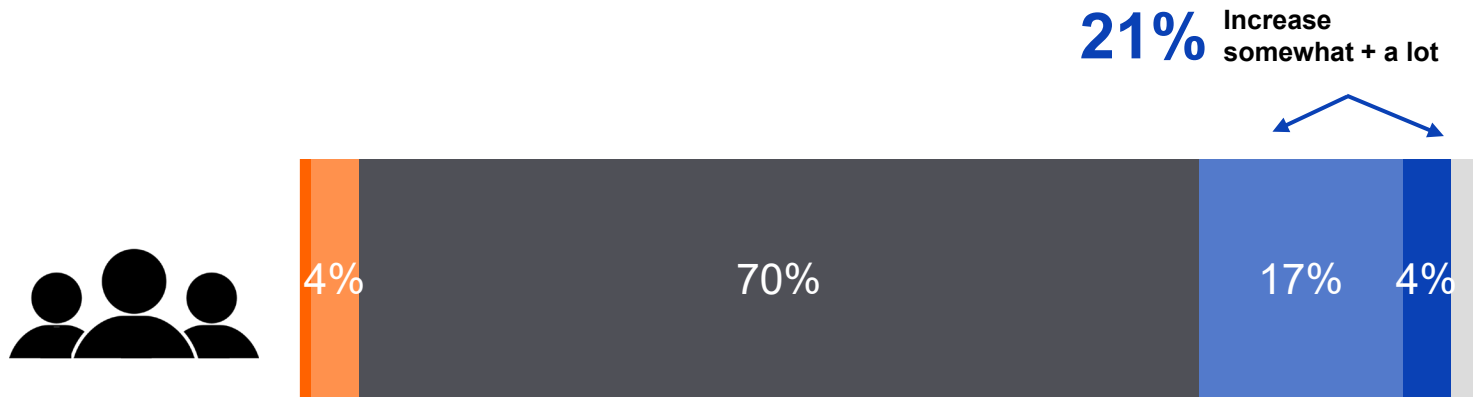
While many travel suppliers have emerged from the pandemic with fewer staff, the same has rarely happened with travel programs.

Travel buyers were asked how their program's staff compares to the pre-pandemic level. More than half (56%) say it is about the same. Roughly one in five say it is larger (22%) than it was pre-pandemic.

# Some Travel Managers Expect Their Program Will Add Staff This Year

Will your travel program's staff size increase or decrease in 2023?  
*travel buyer/procurement professionals only*

■ Decrease a lot ■ Decrease somewhat ■ Remain the same ■ Increase somewhat ■ Increase a lot ■ Not sure



Q. This year (2023), do you expect your travel program will increase or decrease its overall staff size compared to 2022?

Note: Question only displayed to travel buyers/procurement professionals (n=269)

**Some travel managers expect to add staff to their program.** Seven in 10 travel managers (70%) expect their program's staff size will not change this year. However, a decent number (21%) expect it will increase. This could reflect the growing scope and responsibilities of travel programs.

Increasingly, programs are focused on sustainability and workforce mobility and might need additional staff to help tackle these new priorities.

# Which Types of Business Trips Will Companies Take in 2023?

Approximately what percentage of travel spend will be allocated to each of the following types of trips in 2023?  
*averages calculated from open-end responses*



Q Thinking about your company's 2023 travel spend, approximately what percent of likely be allocated to the following purposes? **Note: Question only displayed to travel buyers/procurement professionals (n=196).**

While sales trips will lead the way, internal and conference travel are close behind. On average, travel managers estimate their company will allocate 28% of its travel spend to sales/account management trips in 2023.

This is higher than the share for any other type of trip. However, travel managers also expect their company will allocate a decent share of spend to internal (19%) and conference travel (18%) on average.

# Almost Half of Travel Programs Will Have a Higher Budget for Their Operations This Year

Will travel program budgets be higher or lower in 2023?  
*travel buyer/procurement professionals only*

■ Much lower ■ Lower ■ About the same ■ Higher ■ Much higher ■ Not sure

46% higher + much higher



Q This year (2023), do you expect the budget expenditures for your company's travel program operations (i.e., staff salaries, technology, consultants, etc.) will be higher or lower than it was last year (2022)? **Note: This asks about the budget for your travel program's operations (i.e., staff salaries, technology, consultants, etc). It does not ask about any budget for actual business trips)**

Note: Question only displayed to travel buyers/procurement professionals (n=259)

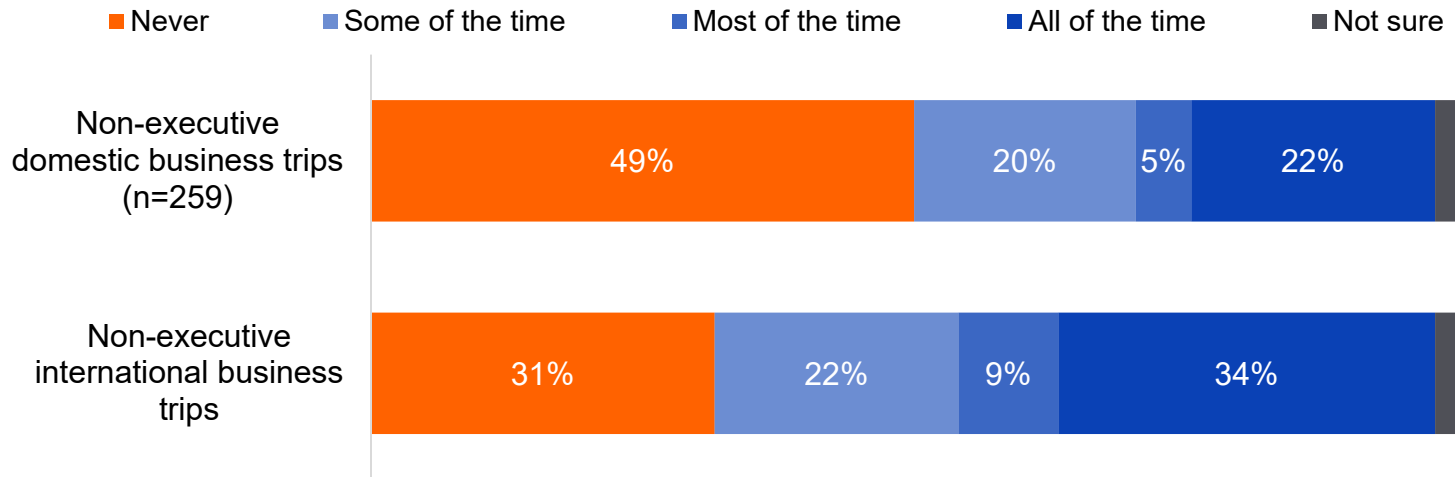
Many travel programs have a higher budget for operations this year. Travel programs commonly have budgets to cover operations. These budgets might cover travel manager salaries, consulting fees, and technology, among other things.

Almost half of travel managers (46%) say their program's budget is higher this year than it was last year. Two in five (41%) say their budget is about the same while one in 10 (10%) say it is lower.



# Will Stricter Approval Processes Persist Post-Pandemic?

How often do travel programs require manual pre-trip approval by someone outside of the employee's chain of command?  
*travel buyers/procurement professionals only*



Q Thinking about the following types of business trips, how often does your company's travel policy require employees to obtain manual pre-trip approval for their trip by staff or executives who do not supervise them, or are not higher in their chain of command? **Examples include travel, risk, sustainability, finance, or HR managers who do not supervise the employee who is seeking to travel**

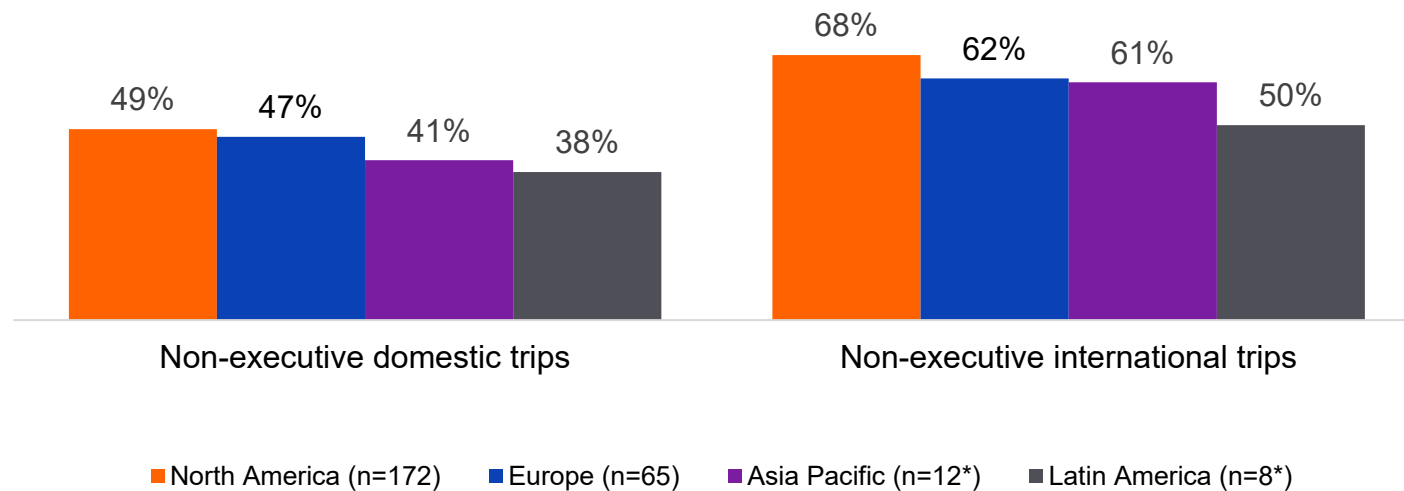
Note: Question only displayed to travel buyers/procurement professionals

During the height of the pandemic, many travel programs adopted stricter pre-trip approval processes because of risk management concerns. While they previously required employees to obtain approval from their manager in order to travel, they now required approval from additional stakeholders—such as risk, HR, legal, or senior leadership. As the pandemic wanes, this approach might have staying power.

With companies cutting cost in anticipation of a possible recession, they might require trips to be approved by the finance/accounting department. Or, they might require approval from the travel department or the sustainability/CSR department. More than one-quarter of travel programs (27%) still require manual approval of non-executive domestic trips by stakeholders outside of the employee's chain of command "most of the time" or "all of the time." Two-fifths of travel programs (41%) require such approval for non-executive international trips "most of the time" or "all of the time."

# Regardless of Region, Some Travel Programs Require Manual Approval

**% of travel programs that at least “some of the time” require manual approval of trips by someone outside of the employee’s chain of command for the following types of trips**  
by region



Q. Thinking about the following types of business trips, how often does your company’s travel policy require employees to obtain manual pre-trip approval for their trip by staff or executives who do not supervise them, or are not higher in their chain of command? Examples include travel, risk, sustainability, finance, or HR managers who do not supervise the employee who is seeking to travel.

Note: Question only displayed to travel buyers/procurement professionals

Regardless of region, a decent number of travel programs require manual approval of trips by someone outside of the employee’s chain of command – such as a travel manager, risk manager, or finance manager.

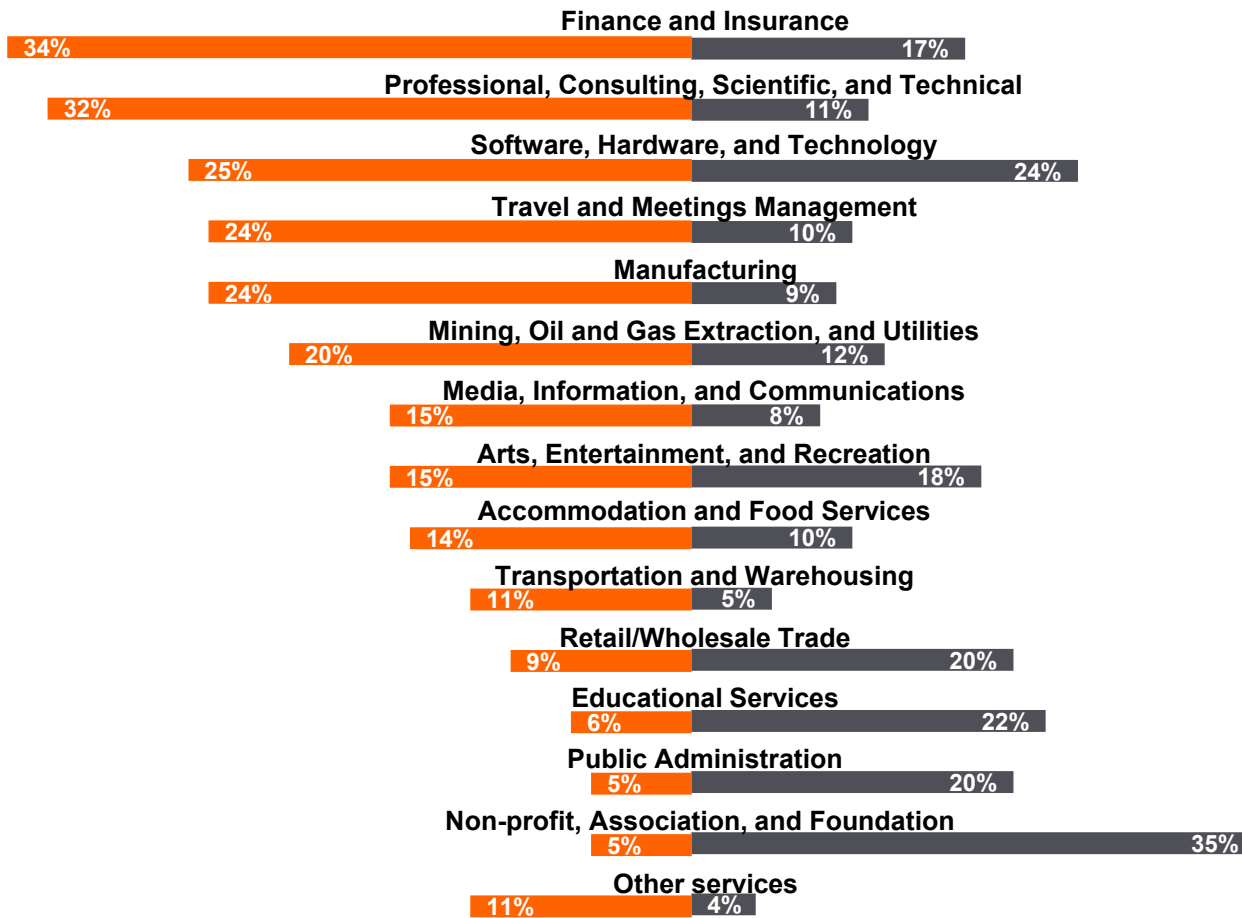
A similar number of North America and Europe-based travel buyers say their company at least sometimes requires such approvals for non-executive domestic and international trips.

# Which Industries Fared Better Last Year?

Thinking about your customers/clients, which industries saw the..?  
*travel supplier/TMC professionals only*

**Strongest** growth in business travel spend in the past year  
*up to 3 answers allowed*

**Weakest** growth in business travel spend in the past year  
*up to 3 answers allowed*



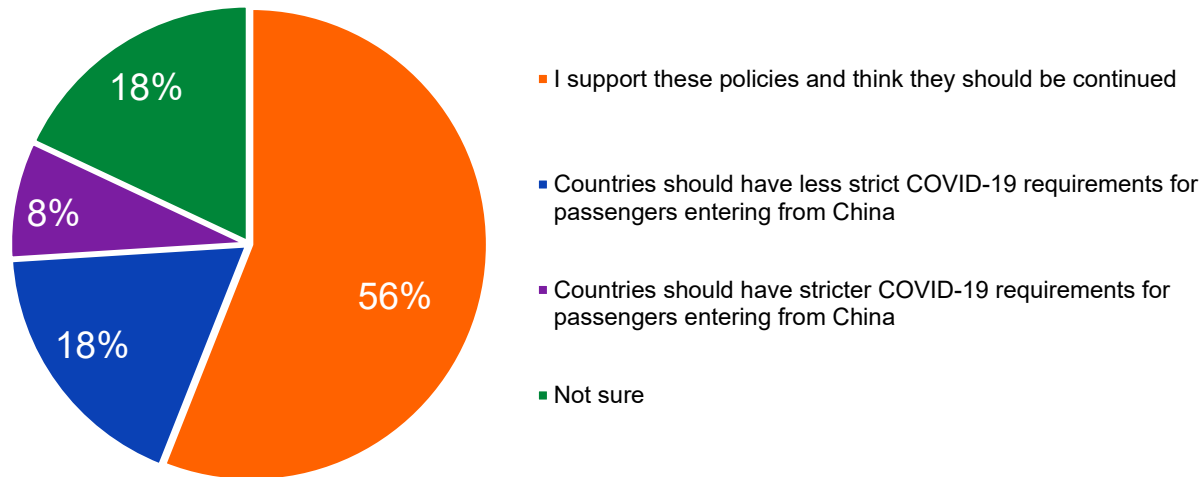
## Some industries have recently fared better than others.

Respondents who work for a travel supplier or TMC were asked to pick three industries that have had the strongest growth in business travel spend in the past year, and three that have had the weakest growth. They commonly say finance and insurance (34%) and professional, consulting, scientific and technical (32%) saw the strongest growth. These industries largely resumed travel last year after lagging other industries—such as manufacturing—in 2021.

However, other industries continue to lag behind. A decent number of travel suppliers saw weak growth from the non-profit sector (35%), software, hardware, and technology (24%), educational services (22%) and public administration (20%).

# Do Business Travel Professionals Support Government Policies Requiring COVID Tests for Inbound Travelers From China?

Do respondents support requiring negative COVID tests—or proof of recovery—for inbound passengers from China?



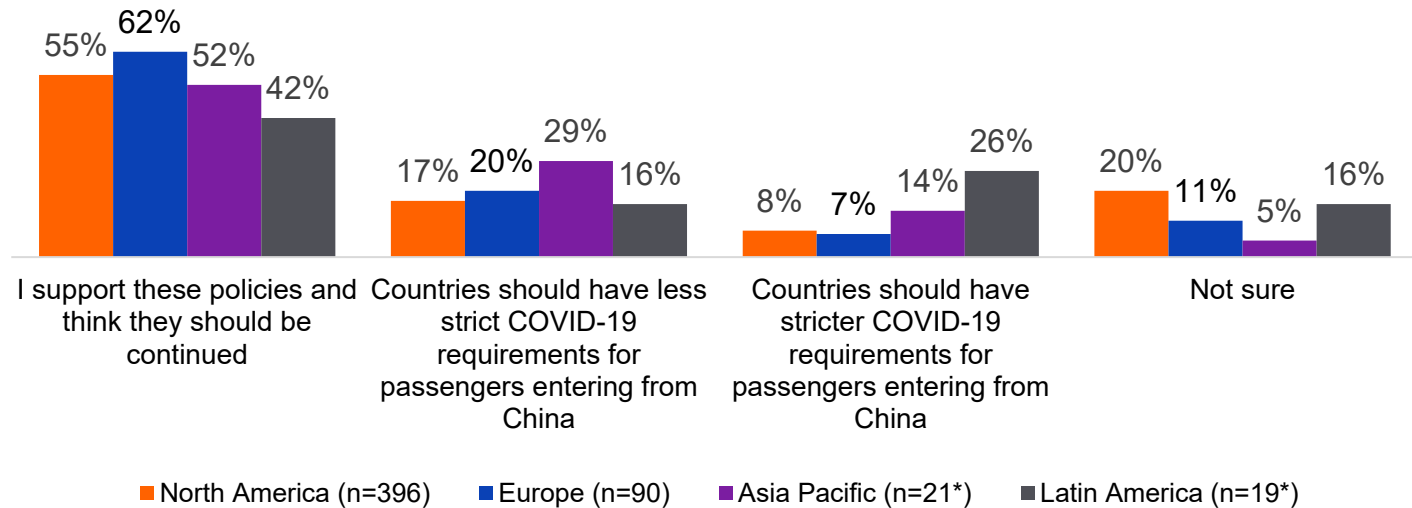
Q Some countries have recently introduced policies that require passengers who are boarding inbound flights from China to provide a negative COVID-19 test or proof of recent recovery in order to enter. Which of the following best describes your view as an industry professional? (n=529)

**Most respondents support COVID testing requirements for inbound passengers from China.** China has recently seen a rising number of COVID-19 cases and some countries—including the U.S. and Japan—have re-introduced testing requirements for inbound passengers from China.

Under these policies, passengers might need to test negative prior to departure, or provide proof of recent recovery. More than half of respondents (56%) support these policies and think they should be continued. One in five (18%) think countries should have less strict COVID-19 requirements for passengers entering from China.

# Support for Restrictive China-Related COVID Policies Is Consistent Across Regions

Do respondents support requiring negative COVID tests—or proof of recovery—for inbound passengers from China?  
by region



Q. Some countries have recently introduced policies that require passengers who are boarding inbound flights from China to provide a negative COVID-19 test or proof of recent recovery in order to enter. Which of the following best describes your view as an industry professional?

\*denotes small sample size for Asia Pacific and Latin America (n<30)

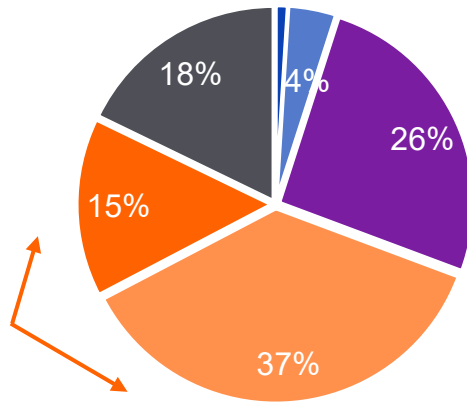
Attitudes about China-related COVID policies do not vary much by region.



# Most Business Travel Professionals Think Restrictive COVID-Related Policies Will Hurt Business Travel To and From China

## How will China-related COVID policies impact the amount of business travel to and from China?

**52%** expect these policies will lead to a significant/moderate decrease in the amount of business travel to and from China



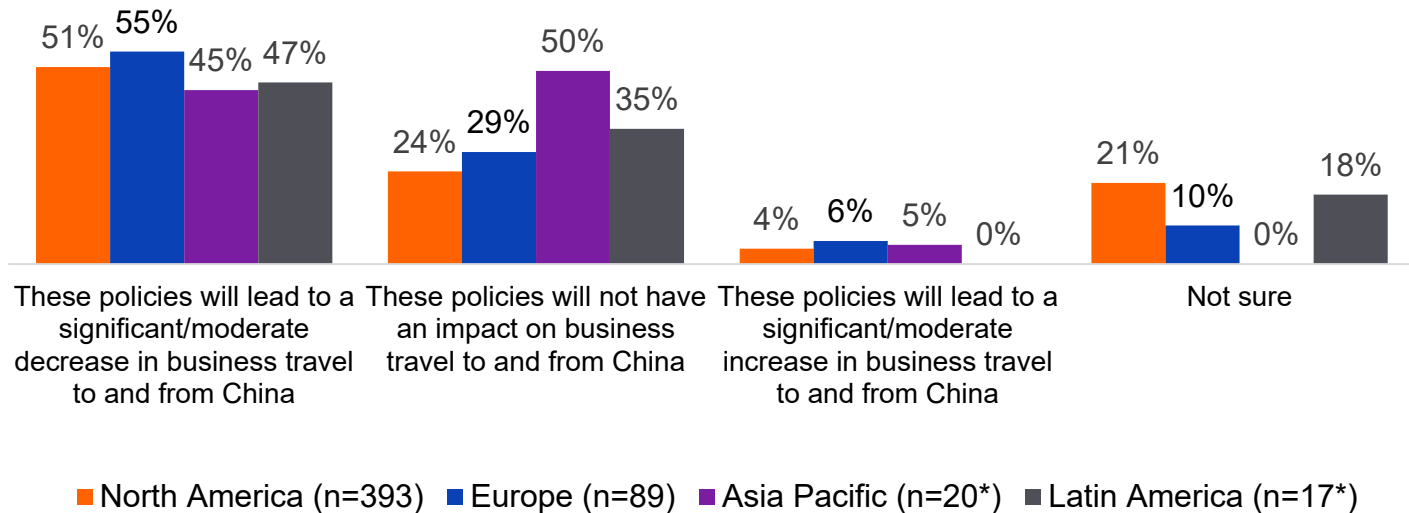
- These policies will lead to a significant increase in the amount of business travel to and from China
- These policies will lead to a moderate increase
- These policies will not have an impact on the amount of business travel to and from China
- These policies will lead to a moderate decrease
- These policies will lead to a significant decrease in the amount of business travel to and from China
- Not sure

Q Some countries have recently introduced policies that require passengers who are boarding inbound flights from China to provide a negative COVID-19 test or proof of recent recovery in order to enter. Which of the following best describes your view as an industry professional? (n=522)

**Restrictive COVID policies are expected to hurt business travel to and from China.** More than half of business travel professionals (52%) think testing requirements for inbound passengers

# Regardless of Region, Most Business Travel Professionals Think COVID-Related Policies Will Hurt Business Travel To and From China

How will China-related COVID policies impact the amount of business travel to and from China?  
by region



Q. Some countries have recently introduced policies that require passengers who are boarding inbound flights from China to provide a negative COVID-19 test or proof of recent recovery in order to enter. Which of the following best describes your view as an industry professional?

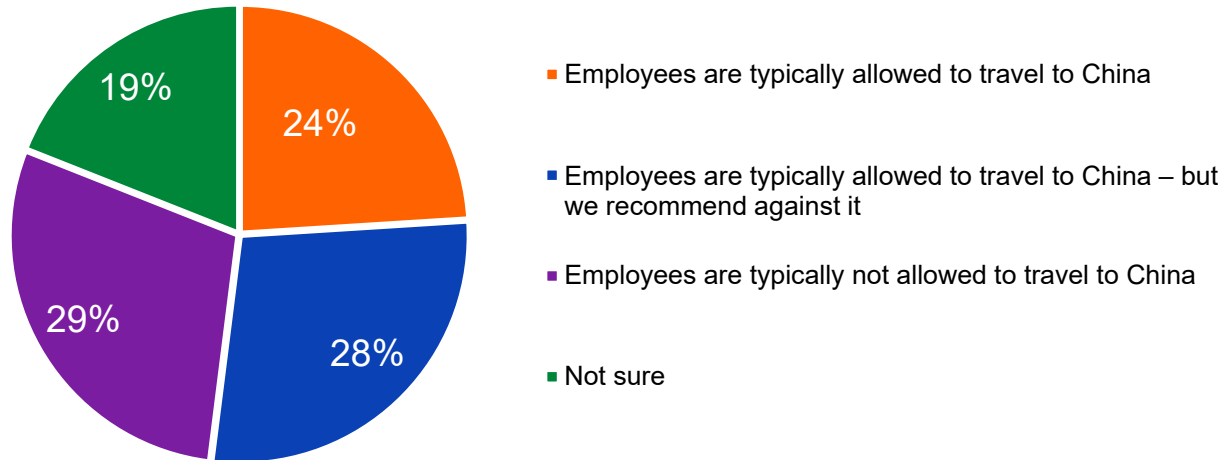
\*denotes small sample size for Asia Pacific and Latin America (n<30)

Across the world, a fairly similar number of business travel professionals think restrictive COVID-related policies will hurt business travel to and from China.

# U.S. Travel Policies Are Split When It Comes to Travel to China

## How Do U.S. Travel Policies Currently Address Travel Policies to China?

*U.S.-based travel managers only*



Q China has recently seen a rising number of COVID cases. Some countries require negative COVID tests for inbound passengers who are entering from China. Thinking about your company specifically, how does it currently address business travel to China?

Note: Question only displayed to U.S.-based travel managers (n=150)

**U.S. travel policies are split when it comes to travel to China.** The U.S. recently introduced a policy that requires inbound passengers from China—including returning U.S. citizens—to provide a negative COVID test or proof of recovery in order to enter the U.S. **This can create problems for travel programs.** If an employee travels to China and contracts COVID, she might need to remain in the country for an additional number of days. Currently, almost one-third of U.S. travel programs (29%) do not typically allow employees to travel to China. A similar number (28%) allow it but recommend against it. One-quarter (24%) currently allow business travel to China.



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# Thank you for your interest in GBTA Research

*For more information on this research or to discuss how GBTA can assist with your research needs, reach out to Chris Ely and Mark Sharoff at [research@gbta.org](mailto:research@gbta.org).*

