



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA BUSINESS TRAVEL OUTLOOK POLL Q1 RESULTS

January 31, 2023

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.



Poll Results

1. Which of the following best describes you?

- Travel manager/buyer: 39%
- Procurement/sourcing professional: 7%
- Supplier: 37%
- TMC: 10%
- Other: 7%

2. [SUPPLIER/TMC] Which of the following best describes the company you work for?

- Hotel chain: 31%
- Travel management company: 22%
- Ground transportation: 6%
- Individual hotel property: 11%
- Travel technology: 7%
- Airline: 13%
- Meetings management provider: 1%
- Payment company: 2%
- Consultant: 2%
- Global distribution system (GDS): 1%
- Other: 5%

3. [BUYERS/PROCUREMENT PROFESSIONALS] This year (2023), do you expect your company will engage in more or less business travel than it did last year?

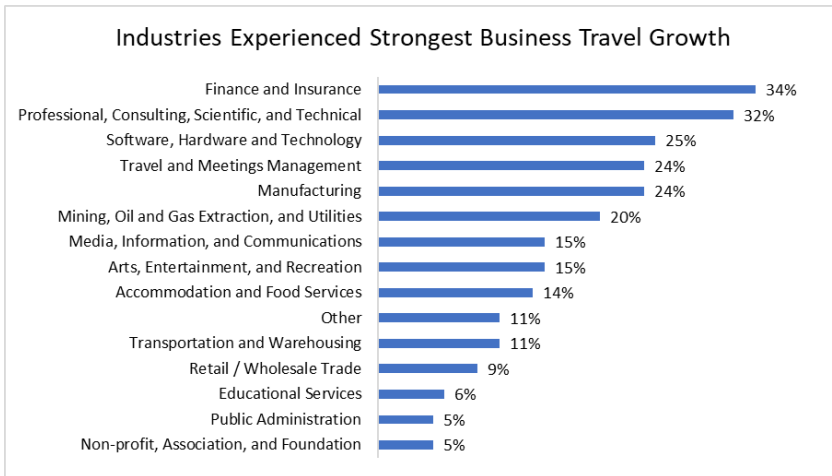
- We will take a lot more business trips (more than 20% additional business trips compared to 2022): 22%
- We will take more business trips (1-20% additional business trips compared to 2022): 55%
- We will take about the same amount of business trips: 15%
- We will take fewer business trips (1-20% fewer business trips compared to 2022): 6%
- We will take a lot fewer business trips (more than 20% fewer business trips compared to 2022): 1%
- Not sure: 1%

4. [SUPPLIER/TMC] This year (2023), what do you expect business travel spending with your company by corporate customers will be?

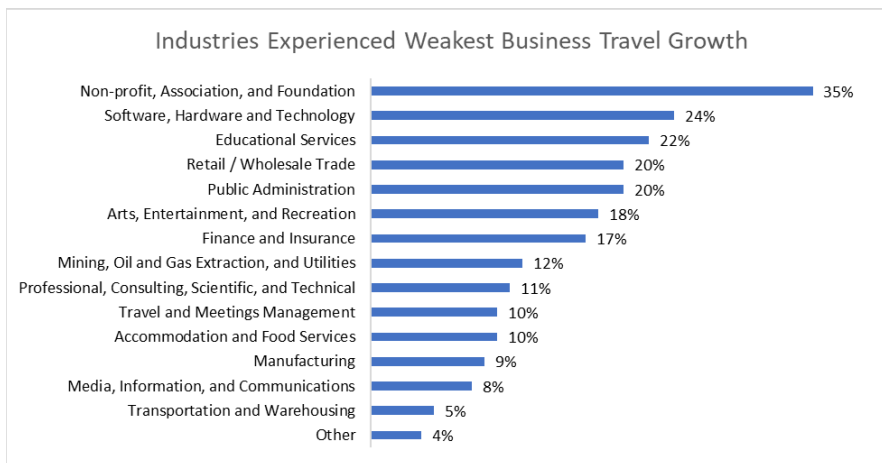
- Much higher than it was last year (more than a 20% increase in business travel spending compared to 2022): 26%

- Somewhat higher than it was last year (approximately a 1-20% increase in business travel spending compared to 2022): 60%
- About the same as it was in 2022: 9%
- Somewhat lower than it was last year (approximately a 1%-20% decline in business travel spending compared to 2022): 1%
- Much lower than it was last year (more than a 20% decline in business travel spending compared to 2022): 0%
- Not sure: 4%

5. [SUPPLIER/TMC] Thinking about your company’s corporate clients/customers specifically, which of the following industries have seen the strongest growth in business travel spend in the past year? Please select up to three.



6. [SUPPLIER/TMC] Thinking about your company’s clients/customers specifically, which of the following industries have seen the weakest or negative growth in business travel spend in the past year? Please select up to three.



7. [SUPPLIER/TMC] Thinking about your company's staff size, is it larger or smaller than it was pre-pandemic (2019)?

- Much larger: 8%
- Somewhat larger: 17%
- About the same: 28%
- Somewhat smaller: 33%
- Much smaller: 14%
- Not sure: 0%

8. [SUPPLIER/TMC] This year (2023), do you expect your company will increase or decrease its overall staff size compared to 2022?

- Our staff size will increase a lot: 10%
- Our staff size will increase somewhat: 55%
- Our staff size will remain the same: 26%
- Our staff size will decrease somewhat: 3%
- Our staff size will decrease a lot: 0%
- Not sure: 5%

9. [BUYER/PROCUREMENT] Thinking about your travel program's staff size, is it larger or smaller than it was pre-pandemic (2019)?

Note: For purposes of this question, travel program staff include people who spend at least half of their time managing or procuring travel or working on related issues such as travel risk management.

- Much larger: 5%
- Somewhat larger: 17%
- About the same: 56%
- Somewhat smaller: 13%
- Much smaller: 7%
- Not sure: 2%

10. [BUYER/PROCUREMENT] This year (2023), do you expect your travel program will increase or decrease its overall staff size compared to 2022? Note: For purposes of this question, travel program staff include people who spend at least half of their time managing or procuring travel or working on related issues such as travel risk management.

- Our travel program staff size will increase a lot: 4%
- Our travel program staff size will increase somewhat: 17%
- Our travel program staff size will remain the same: 70%
- Our travel program staff size will decrease somewhat: 4%
- Our travel program staff size will decrease a lot: 1%
- Not sure: 3%

11. 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.

[MATRIX: ALL OF THE TIME, MOST OF THE TIME, SOME OF THE TIME, NEVER, NOT SURE]

	All the time	Most of the time	Some of the time	Never	Not sure
Domestic	22%	5%	20%	49%	3%
international	34%	9%	22%	31%	3%

12. [BUYER/PROCUREMENT] 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)

- Much higher: 3%
- Higher: 42%
- About the same: 41%
- Lower: 8%
- Much lower: 2%
- Not sure: 3%

13. [BUYER/PROCUREMENT] Thinking about your company’s 2023 travel spend, approximately what percent of likely be allocated to the following purposes?

	% Buyers
Conferences, trade shows, or industry events	18%
Internal company meetings with colleagues	20%
Sales/account management meetings with current or prospective customers	28%
Service trips	14%
Supplier meetings	6%
Employee training or development	9%
Other	6%

14. 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?

	All	Buyer	Supplier
I support these policies and think they should be continued	56%	57%	54%
Countries should have less strict COVID-19 requirements for passengers entering from China	18%	14%	22%
Countries should have stricter COVID-19 requirements for passengers entering from China	8%	8%	8%
Not sure	18%	21%	15%

15. 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?

- These policies will lead to a significant decrease in the amount of business travel to and from China: 15%
- These policies will lead to a moderate decrease in the amount of business travel to and from China: 37%
- These policies will not have an impact on the amount of business travel to and from China: 26%
- These policies will lead to a moderate increase in the amount of business travel to and from China: 4%
- These policies will lead to a significant increase in the amount of business travel to and from China: 1%
- Not sure: 18%

16. [BUYER/PROCUREMENT] 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?

- Employees are typically allowed to travel to China: 24%
- Employees are typically allowed to travel to China – but we recommend against it: 28%
- Employees are typically not allowed to travel to China: 29%
- Not sure: 19%

17. [BUYER/PROCUREMENT] 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.

Estimated average: 67% of pre-pandemic bookings

- Less than 10% of our pre-pandemic bookings: 2%
- 11-20% of our pre-pandemic bookings: 4%
- 21-30% of our pre-pandemic bookings: 4%
- 31-40% of our pre-pandemic bookings: 7%
- 41-50% of our pre-pandemic bookings: 9%
- 51-60% of our pre-pandemic bookings: 6%

- 61-70% of our pre-pandemic bookings: 12%
- 71-80% of our pre-pandemic bookings: 19%
- 81-90% of our pre-pandemic bookings: 10%
- 91-100% of our pre-pandemic bookings: 9%
- We have already exceeded our pre-pandemic domestic bookings: 12%
- Not sure: 5%

18. [BUYER/PROCUREMENT] 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.

Estimated average: 54% of pre-pandemic bookings

- Less than 10% of our pre-pandemic bookings: 7%
- 11-20% of our pre-pandemic bookings: 8%
- 21-30% of our pre-pandemic bookings: 8%
- 31-40% of our pre-pandemic bookings: 9%
- 41-50% of our pre-pandemic bookings: 9%
- 51-60% of our pre-pandemic bookings: 8%
- 61-70% of our pre-pandemic bookings: 10%
- 71-80% of our pre-pandemic bookings: 14%
- 81-90% of our pre-pandemic bookings: 4%
- 91-100% of our pre-pandemic bookings: 5%
- We have already exceeded our pre-pandemic international bookings: 9%
- Not sure: 8%

19. [BUYER/PROCUREMENT] 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.

Estimated average: 68% of pre-pandemic spend

- Less than 10% of our pre-pandemic spend: 0%
- 11-20% of our pre-pandemic spend: 5%
- 21-30% of our pre-pandemic spend: 6%
- 31-40% of our pre-pandemic spend: 6%
- 41-50% of our pre-pandemic spend: 7%
- 51-60% of our pre-pandemic spend: 8%
- 61-70% of our pre-pandemic spend: 9%
- 71-80% of our pre-pandemic spend: 17%
- 81-90% of our pre-pandemic spend: 13%
- 91-100% of our pre-pandemic spend: 9%
- We have already exceeded our pre-pandemic domestic spend: 14%
- Not sure: 6%

20. [BUYER/PROCUREMENT] 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.

Estimated average: 58% of pre-pandemic spend

- Less than 10% of our pre-pandemic spend: 7%
- 11-20% of our pre-pandemic spend: 7%
- 21-30% of our pre-pandemic spend: 7%
- 31-40% of our pre-pandemic spend: 9%
- 41-50% of our pre-pandemic spend: 8%
- 51-60% of our pre-pandemic spend: 11%
- 61-70% of our pre-pandemic spend: 6%
- 71-80% of our pre-pandemic spend: 13%
- 81-90% of our pre-pandemic spend: 6%
- 91-100% of our pre-pandemic spend: 6%
- We have already exceeded our pre-pandemic domestic spend: 12%
- Not sure: 8%

21. [BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 69%
- Somewhat willing: 22%
- Neither willing nor unwilling: 7%
- Not willing: 1%
- Not willing at all: 0%
- Not sure: 2%

22. [SUPPLIER/TMC] How do you currently feel about the business travel industry's path to recovery?

- Very optimistic: 24%
- Optimistic: 65%
- Neither optimistic nor pessimistic: 9%
- Pessimistic: 3%
- Very pessimistic: 0%

23. [DISPLAY IF BUYER/PROCUREMENT] Which of the following industries best describes your organization?

- Accommodation and Food Services: 1%
- Arts, Entertainment, and Recreation: 2%
- Construction: 1%
- Consulting: 6%
- Educational Services: 2%
- Engineering: 2%
- Finance and Insurance: 11%
- Health Care, Pharmaceuticals and Social Assistance: 11%
- Manufacturing: 15%
- Media, Information, and Communications: 4%

- Mining, Oil and Gas Extraction and Utilities: 5%
- Non-profit, Association and Foundation: 6%
- Professional, Scientific and Technical: 3%
- Public Administration: 1%
- Retail / Wholesale Trade: 3%
- Software/Technology: 14%
- Telecommunications: 3%
- Transportation and Warehousing: 1%
- Travel and Meetings Management: 1%
- Other (please specify): 10%