



**GBTA** Global Business  
Travel Association

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# GBTA Business Travel Recovery Poll Results

April 26, 2023



# Methodology

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

- Data collection from April 6 through April 21, 2023
- An email invitation was sent to 17,759 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, 805 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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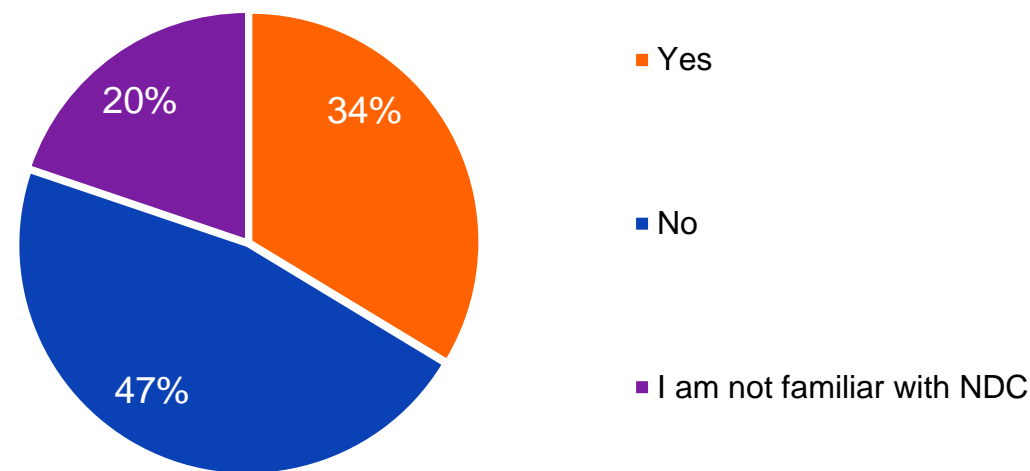
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# New Distribution Capability (NDC)



# Do Business Travel Professionals Support a Major Airline’s Decision to Remove Content From Legacy Distribution Channels?

Do business travel professionals support a U.S. airline’s decision to make some content only accessible through “modern” channels?

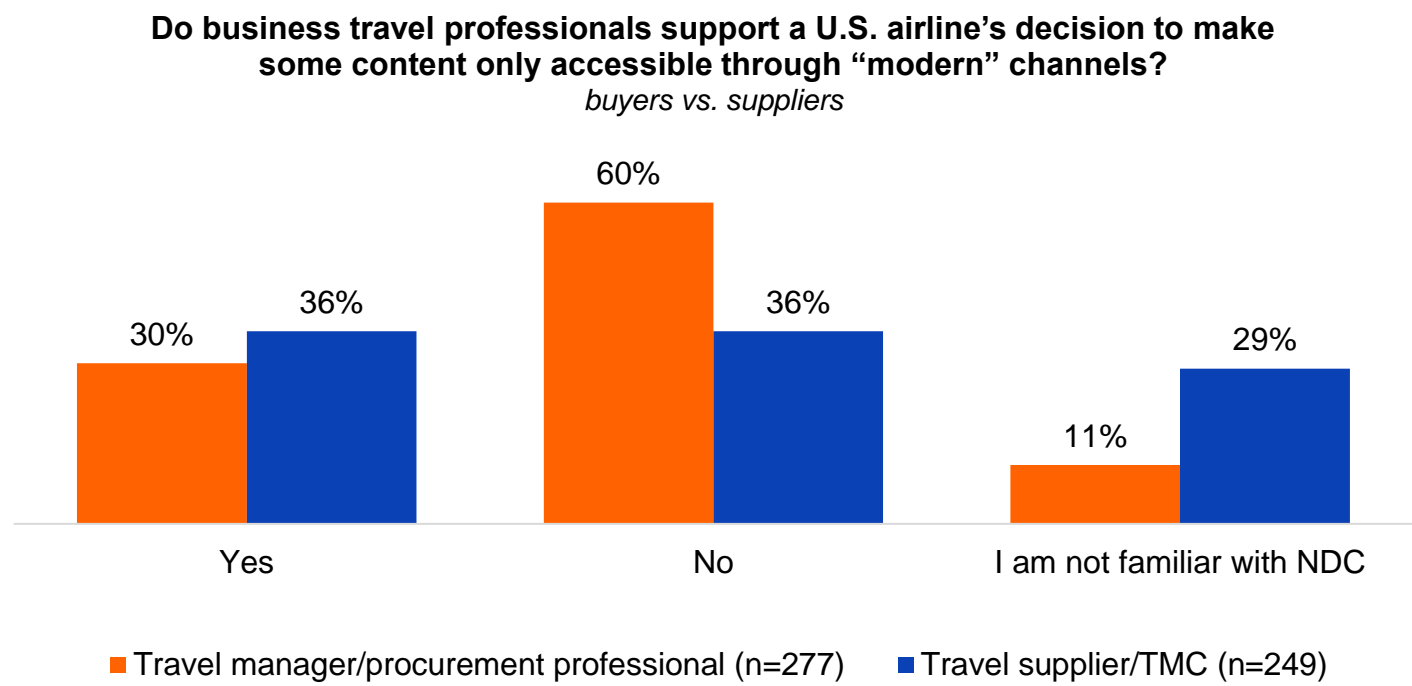


Q. A U.S. airline has informed travel agencies that more than 40 percent of its existing content, as well as newly developed offers, would be accessible only through “modern” channels as of April 2023. Some view this as an effort to expedite the distribution of New Distribution Content (NDC). Do you support this effort? (n=576)

A major U.S. airline recently removed a large portion of its fares and inventory from traditional EDIFACT-based distribution channels which third-party intermediaries—such as TMCs, GDSs, and OBTs—use to access them. This airline will only make this content available to intermediaries through “modern retailing channels.” These channels include New Distribution Capability (NDC)-compliant application programming interfaces (APIs). Business travel professionals have mixed opinions about this decision. One-third (34%) support it while half (47%) do not. One in five (20%) say they are not familiar with NDC.



# 3 in 5 Travel Buyers Oppose a U.S. Airline’s Decision to Remove Content From Legacy Distribution Channels

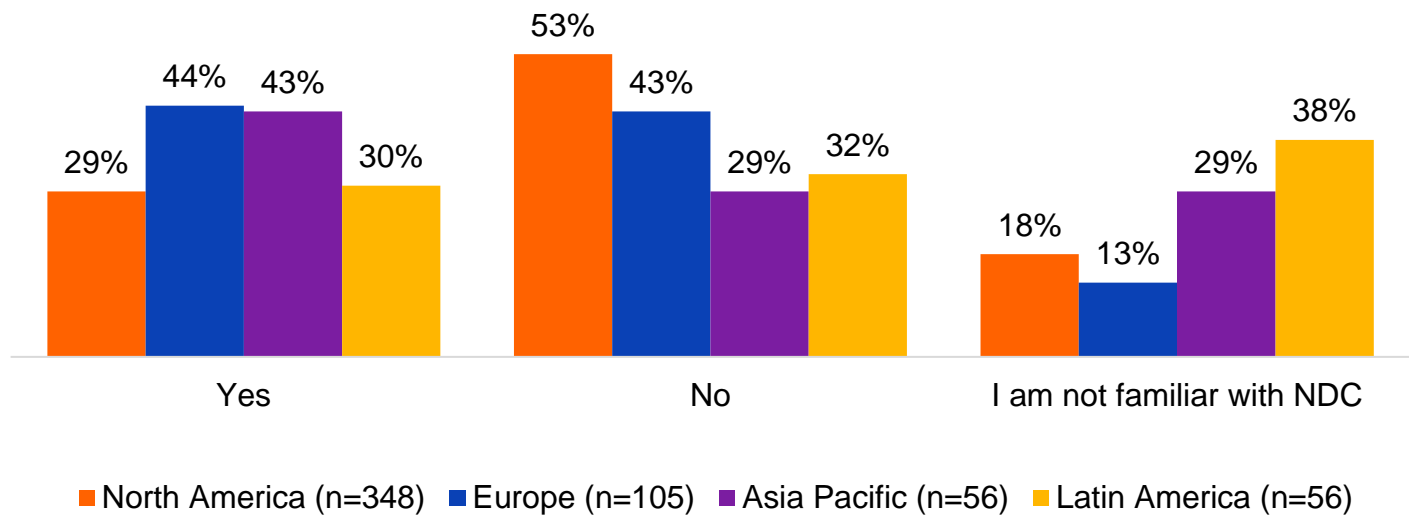


Travel buyers are more likely than suppliers to oppose removing content from legacy distribution channels. While a decent number of buyers (30%) support a U.S. airline’s decision to make some fares and inventory only accessible through “modern retailing channels,” a larger number (60%) oppose this decision.

Q. A U.S. airline has informed travel agencies that more than 40 percent of its existing content, as well as newly developed offers, would be accessible only through “modern” channels as of April 2023. Some view this as an effort to expedite the distribution of New Distribution Content (NDC). Do you support this effort? (n=576)

# Support for Distribution Changes Varies by Region

Do business travel professionals support a U.S. airline’s decision to make some content only accessible through “modern” channels?  
*by region*



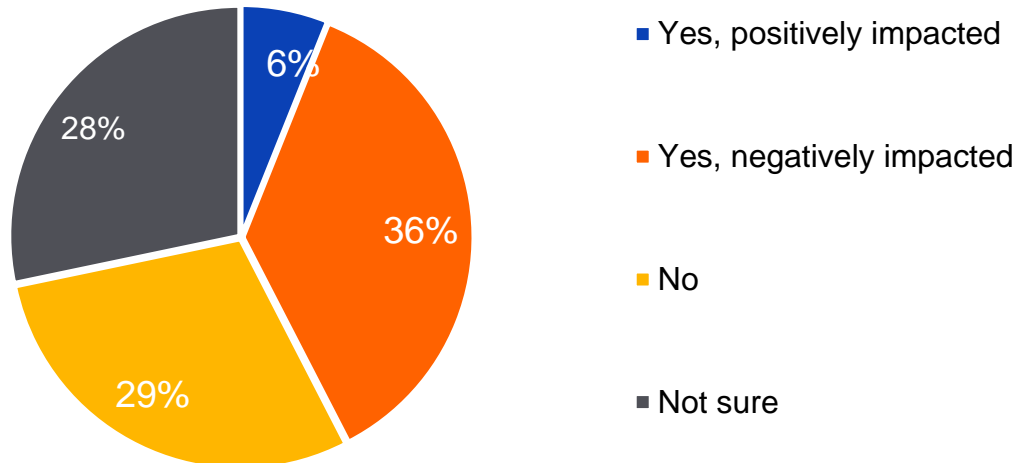
Q. A U.S. airline has informed travel agencies that more than 40 percent of its existing content, as well as newly developed offers, would be accessible only through “modern” channels as of April 2023. Some view this as an effort to expedite the distribution of New Distribution Content (NDC). Do you support this effort? (n=576)

**Support for distribution changes varies by region.** Europe (44%) and Asia Pacific-based business travel professionals (43%) are more likely to support a major airline’s decision to make certain fares and inventory only available through “modern” channels. North America (29%) and Latin America-based business travel professionals (30%) are less likely to support this effort.

# The **Travel Buyer's** Perspective

## 2 in 5 Travel Buyers Say Their Program Has Been Impacted By the Removal of Content From Traditional Distribution Channels

Have travel programs been impacted by similar moves to integrate NDC by other carriers?  
*travel buyers only*

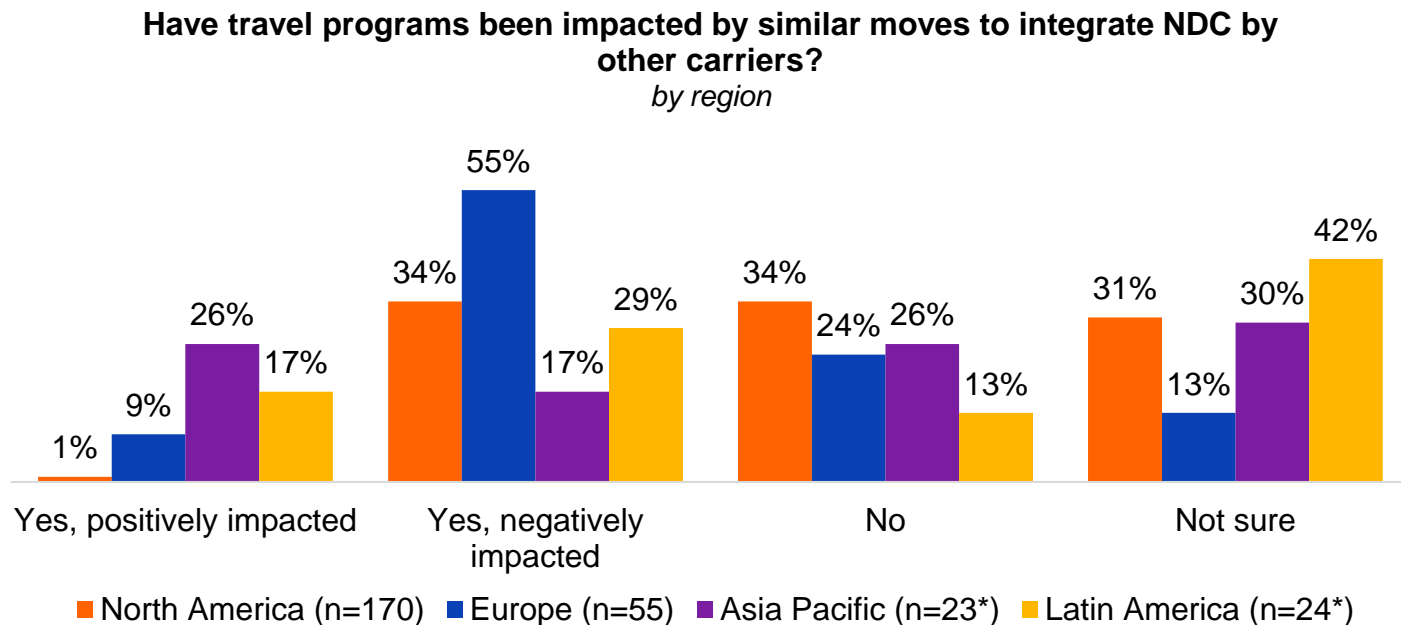


Q. Has your travel program been impacted by similar moves to integrate NDC by other carriers?

**Note: Question only displayed to travel buyers/procurement professionals (n=277)**

**A major U.S. airline recently removed certain fares and inventory from legacy distribution channels.** However, this airline is not the first—or the only—carrier to make such a move. Several other major airlines—especially in Europe—have implemented or announced similar plans. More than two in five travel buyers (42%) say their program has been impacted by similar moves to integrate NDC by other airlines. They are more likely to say their travel program has been “negatively impacted” (36%) than “positively impacted” (6%) by such moves.

## European Travel Programs Are Most Likely to Have Been Impacted by Distribution Changes



Q. Has your travel program been impacted by similar moves to integrate NDC by other carriers?

**Note: Question only displayed to travel buyers/procurement professionals**

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

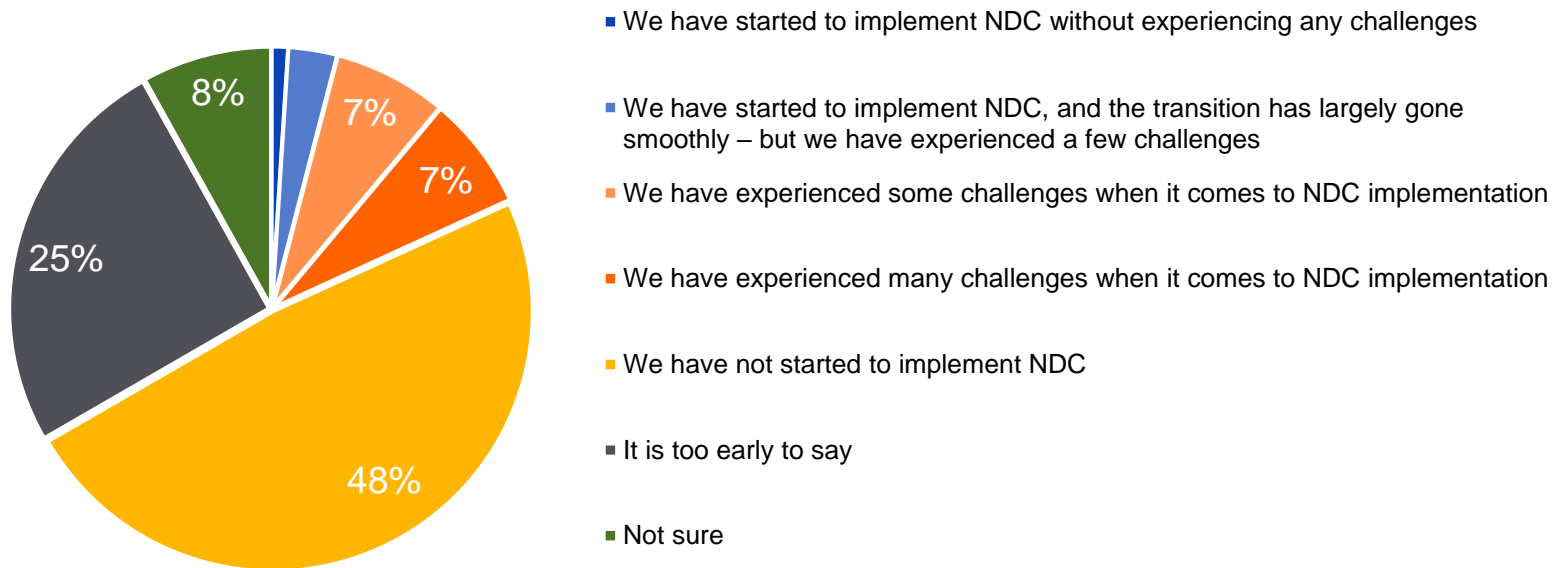
European travel programs are most likely to have been impacted by the removal of content from traditional distribution channels. Almost two-thirds of Europe-based travel managers (64%) say their program has been impacted by such changes. This compares to only one-third of North America-based buyers (35%) who say their program has been impacted. A larger number of Europe-based buyers say their program has been “negatively impacted” (55%) than “positively impacted” (9%).



# The **Travel Buyer's** Perspective

## For Travel Buyers, The Jury Is Still Out on NDC Implementation

Thinking about your travel program's implementation of NDC, which statement best represents your experience?  
*travel buyers only*



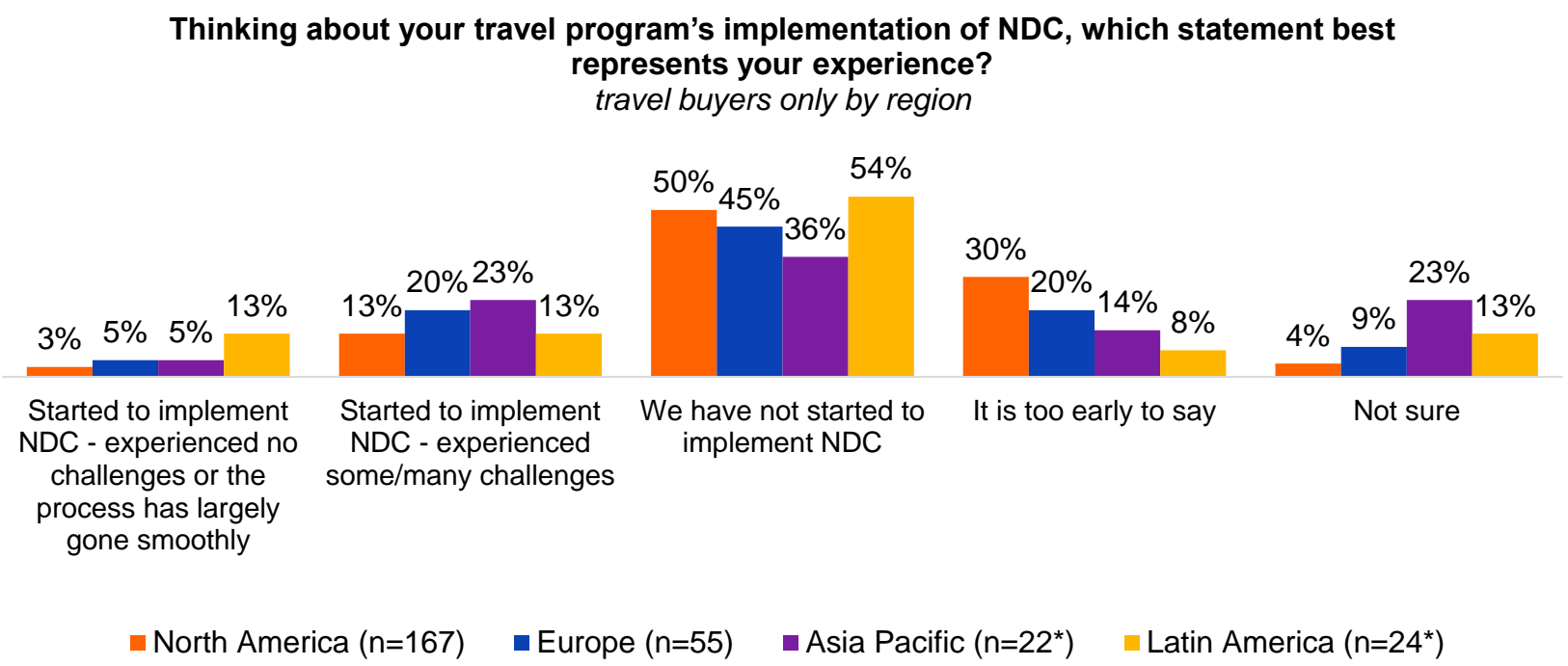
Q. Has your travel program been impacted by similar moves to integrate NDC by other carriers?

**Note: Question only displayed to travel buyers/procurement professionals (n=277)**

**Most travel programs have not made enough progress with NDC implementation to be able to assess how the process has gone.** Only 4% of travel buyers say their program has started to implement NDC and they have not experienced any challenges (1%) or the transition has largely gone smoothly (3%). Fourteen percent say they have started to implement NDC and have experienced some (7%) or many (7%) challenges. A much larger number say their program has not started to implement NDC (48%) or it is too early to say (25%) how the process has gone.

# The **Travel Buyer's** Perspective

## There Are Not Major Regional Differences When It Comes to Buyer Opinions About NDC Implementation



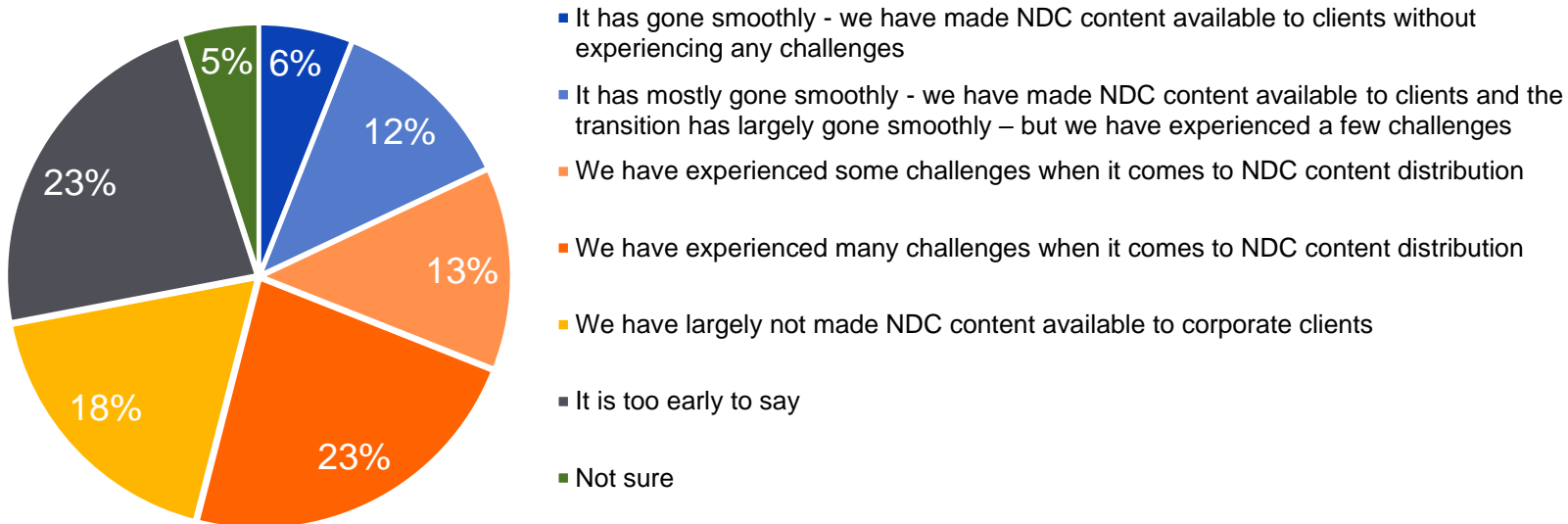
Q. Thinking about your travel program's implementation of NDC, which statement best represents your experience?  
**Note: Question only displayed to travel buyers/procurement professionals**  
**\*indicates small sample size for buyers in Asia Pacific and Latin America (n<30)**

Regardless of region, most travel managers say their program has not started implementing NDC – or it is too early to assess how the implementation process has gone.

# The **Travel Intermediary's** Perspective

## Some Intermediaries Say They Have Faced Challenges With NDC Implementation

Thinking about your company's ability to distribute NDC content to your corporate clients, which statement best represents your experience?  
*intermediaries only*



Q. Thinking about your company's ability to distribute NDC content to your corporate clients, which statement best represents your experience?

**Note: Question only displayed to respondents who work at a TMC, GDS, or OBT**

**Third-party intermediaries—including TMCs, GDSs, and OBTs — have done significant work to pave the way for NDC.** They have invested heavily in technology and revamped decades-old processes. Intermediaries are split when asked how this transition has gone. Like buyers, a fairly significant number of employees at intermediaries (23%) think it is too early to assess. Almost one in five (18%) say they have made NDC content available to clients without experiencing any challenges (6%) – or while experiencing only a few challenges (12%). More than one-third (36%) say they have experienced some (13%) or many (23%) challenges when it comes to NDC content distribution.

# The **Travel Buyer's** Perspective

## Half of Travel Buyers Say Airlines Are Moving Too Fast to Roll Out NDC

Thinking about the overall roll-out of NDC in the industry,  
which of the following best describes your view?  
*buyers only*



53%

**Airlines are moving too fast:** Some airlines are trying to roll out NDC bookings too quickly and have not given third-party intermediaries--such as GDSs, TMCs, OBTs, and back-office technology providers--enough time to develop the technology and processes needed to efficiently handle and service these bookings



29%

**Intermediaries should be ready:** Third-party intermediaries have had enough time to work on NDC and should be ready to efficiently handle and service NDC bookings

17%

**Don't know/  
Not sure/  
Other**

**NDC adoption has largely been driven by airlines.** However, *successful* adoption will depend crucially on intermediaries. These companies might need to invest in technology development, reinvent processes and protocols, and train staff. Have intermediaries had enough time to work through these issues?

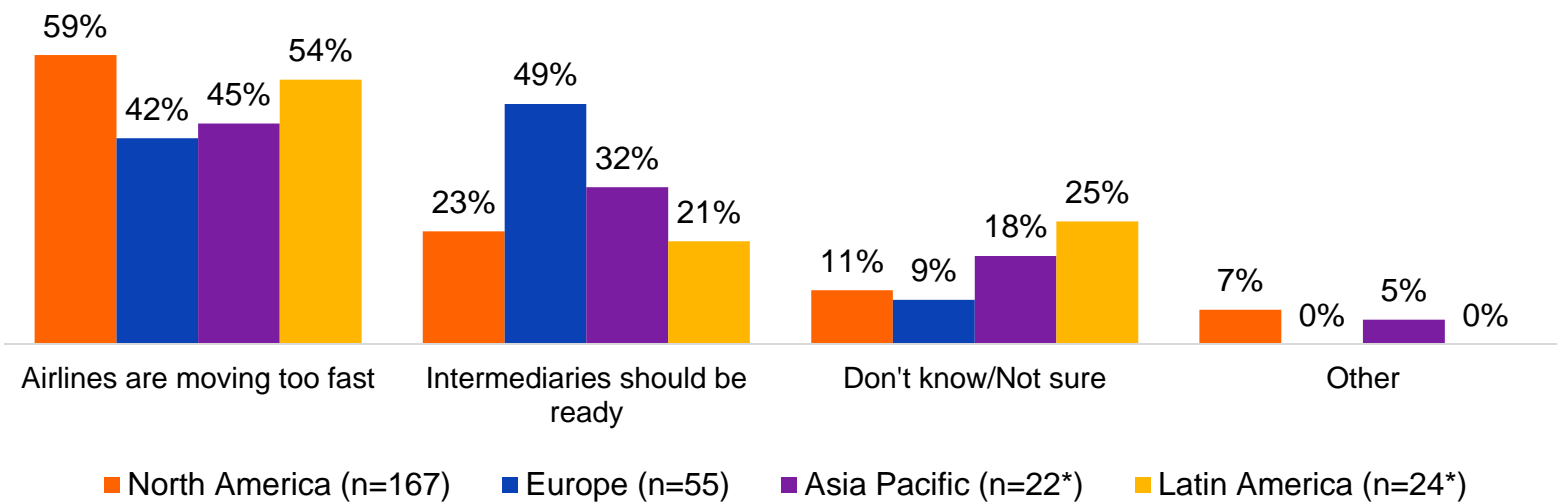
Half of travel buyers (53%) think airlines are moving too fast to roll out NDC and have not left intermediaries enough time to develop the technology and processes needed to efficiently handle and service these bookings. While this is the view most commonly held by buyers, it is not universal. More than one-quarter of buyers (29%) say that intermediaries have been given enough time to work on NDC and should be ready to handle and service these bookings

Q. Thinking about the overall roll-out of NDC in the industry, which of the following best describes your view?  
**Note: Question only displayed to travel buyers/procurement professionals (n=273)**

# The **Travel Buyer's** Perspective

## North American Travel Buyers Are Most Likely to Feel Airlines Are Moving Too Fast With NDC

Thinking about your travel program's implementation of NDC, which statement best represents your experience?  
*travel buyers only by region*



Q. Thinking about your company's ability to distribute NDC content to your corporate clients, which statement best represents your experience?  
**Note: Question only displayed to respondents who work at a TMC, GDS, or OBT**

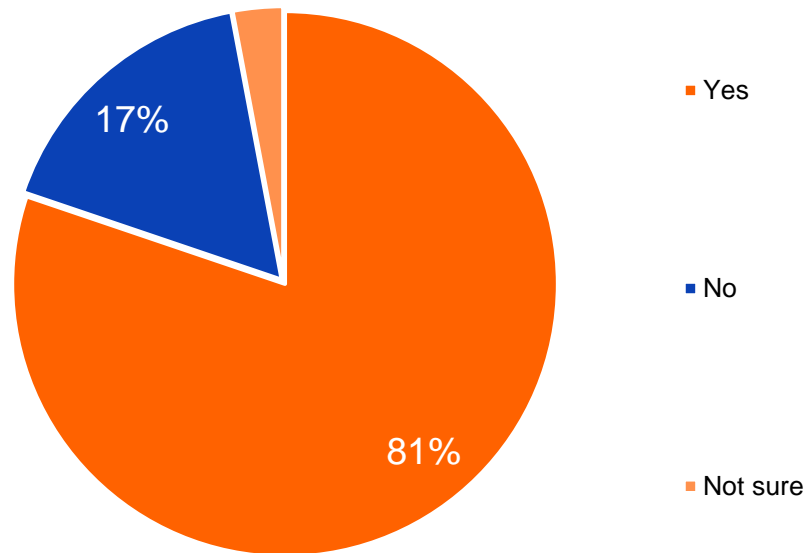
North American travel managers are more likely to say intermediaries are moving too quickly to roll out NDC. Of these travel managers, three in five (59%) say airlines are moving too fast to roll out NDC. Fewer than one-quarter (23%) say intermediaries have had enough time to prepare and should be ready.



# The **Travel Buyer's** Perspective

## Widespread Need for More Information and Education About NDC

In general, do you feel you need more information or education about NDC/airline retailing/ distribution?  
*buyers only*



Q. Thinking about your travel program's implementation of NDC, which statement best represents your experience?

**Note: Question only displayed to travel buyers/procurement professionals**

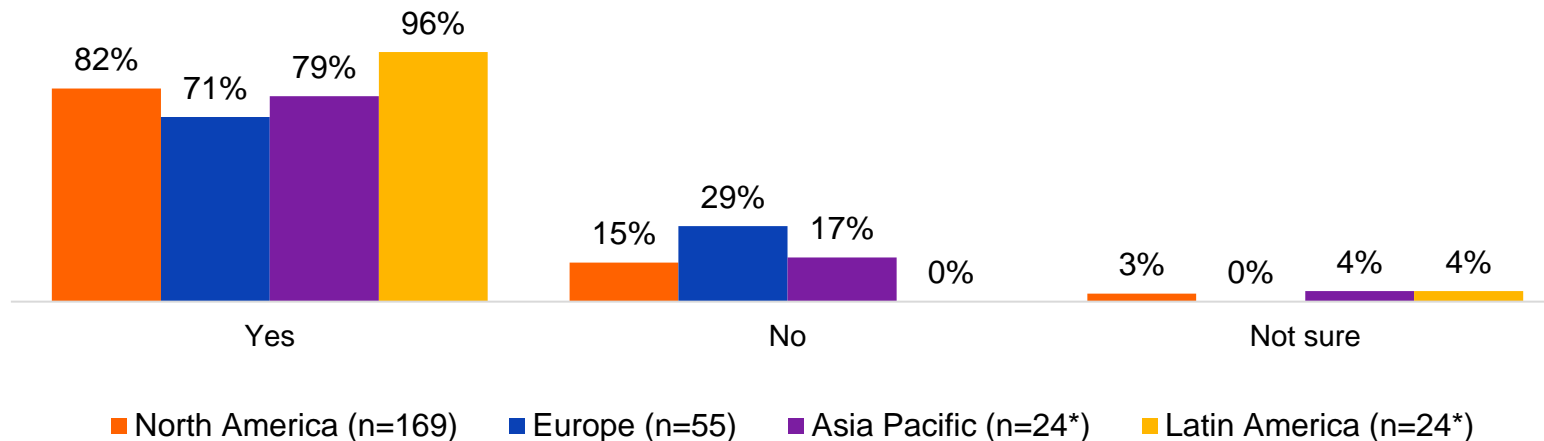
**\*indicates small sample size for buyers in Asia Pacific and Latin America (n<30)**

**Four in five travel buyers (81%) feel they need more information and education about NDC. Only 17% do not feel they do not.**

# The **Travel Buyer's** Perspective

## Regardless of Region, Travel Buyers Feel They Need More Information and Education About NDC

In general, do you feel you need more information or education about NDC/airline retailing/ distribution?  
*travel buyers only by region*



Q. In general, do you feel you need more information or education about NDC / airline retailing / distribution?

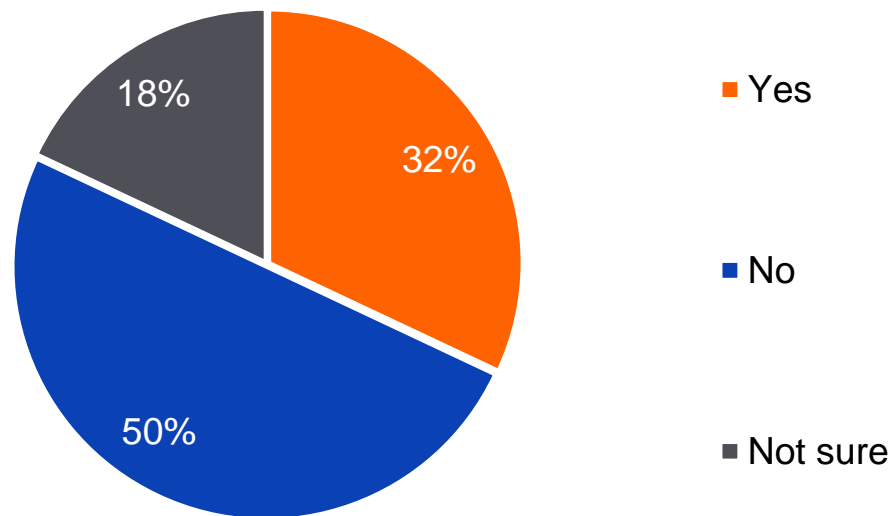
**Note: Question only displayed to travel buyers/procurement professionals (n=277)**

Regardless of region, travel buyers feel they need more information and education about NDC. However, Europe-based travel managers are less likely to feel this way than travel managers in other regions.

# The **Travel Buyer's** Perspective

## Travel Buyers Also Feel Their TMC Needs More Information About NDC

Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?  
*buyers only*



Q. Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?

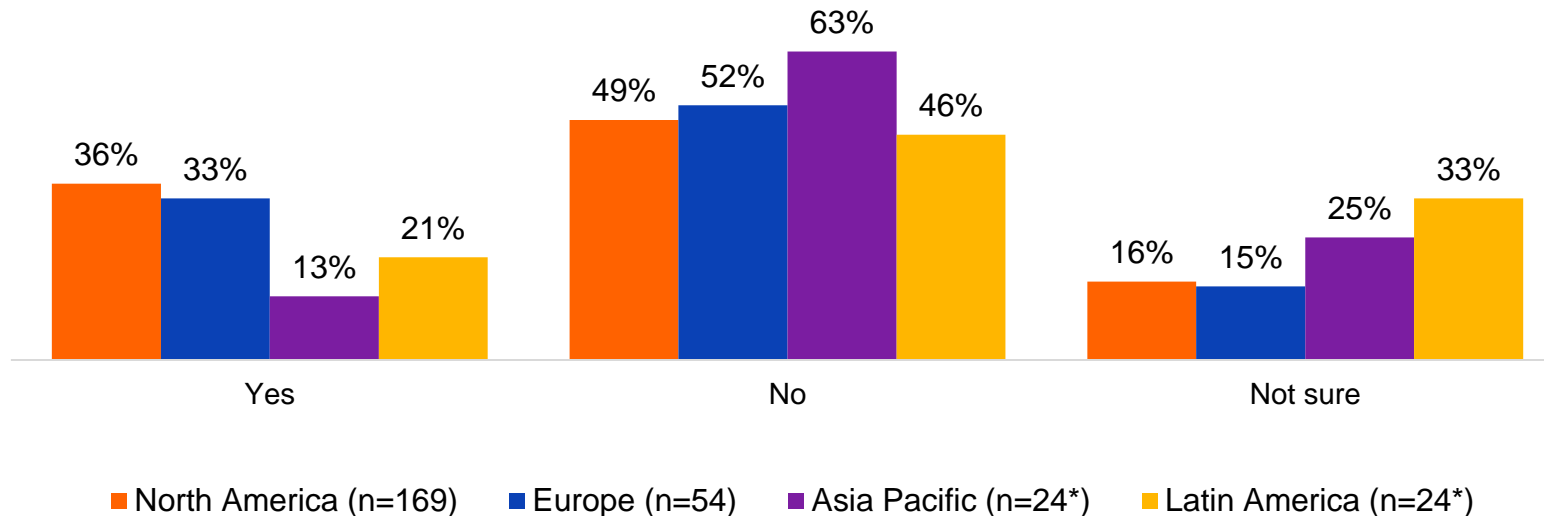
**Note: Question only displayed to travel buyers/procurement professionals (n=276)**

Only one-third of travel managers (32%) say their TMC has enough information on NDC and is communicating plans including potential mitigation. A larger number (50%) feel their TMC does not have enough information and is not sharing its NDC-related plans.

# The **Travel Buyer's** Perspective

## Across the World, a Similar Number of Buyers Say Their TMC Needs More Information About NDC

Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?  
*travel buyers only by region*



Q. Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?

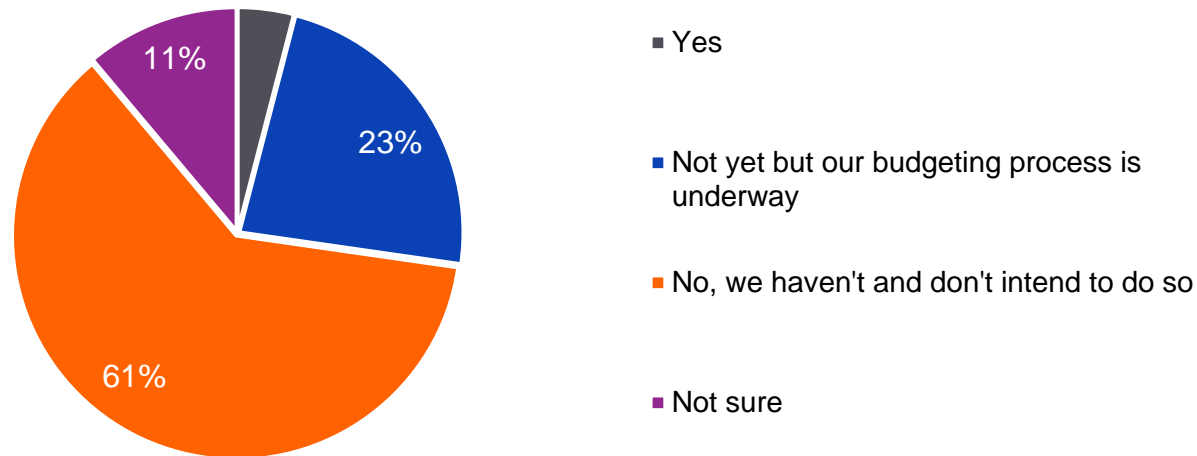
**Note: Question only displayed to travel buyers/procurement professionals**

**\*indicates small sample size in Asia Pacific and Latin America (n<30)**

Across the world, a similar number of travel buyers say their TMC does not have enough information about NDC and is not doing enough to communicate its NDC-related plans. Half of North America-based travel managers feel this way (49%) which is similar to the share in Europe (52%) and Asia Pacific (46%).

## Most Companies Do Not Plan to Budget Extra Money For NDC-Related Servicing Costs

Have you budgeted for potential additional servicing costs for NDC-related bookings?  
*buyers only*



Q. Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?

**Note: Question only displayed to travel buyers/procurement professionals (n=276)**

**One of the most significant pain points with NDC is the difficulty of canceling or modifying bookings.** In some cases, this cannot currently be done by travelers using a corporate booking tool. Travelers might need to call or email the airline or TMC for assistance. As a result, their company could be charged fees for some of these interactions. However, travel programs are not currently budgeting extra money to cover these fees. Three in five travel buyers (61%) say their company has not budgeted extra money for NDC-related servicing costs.

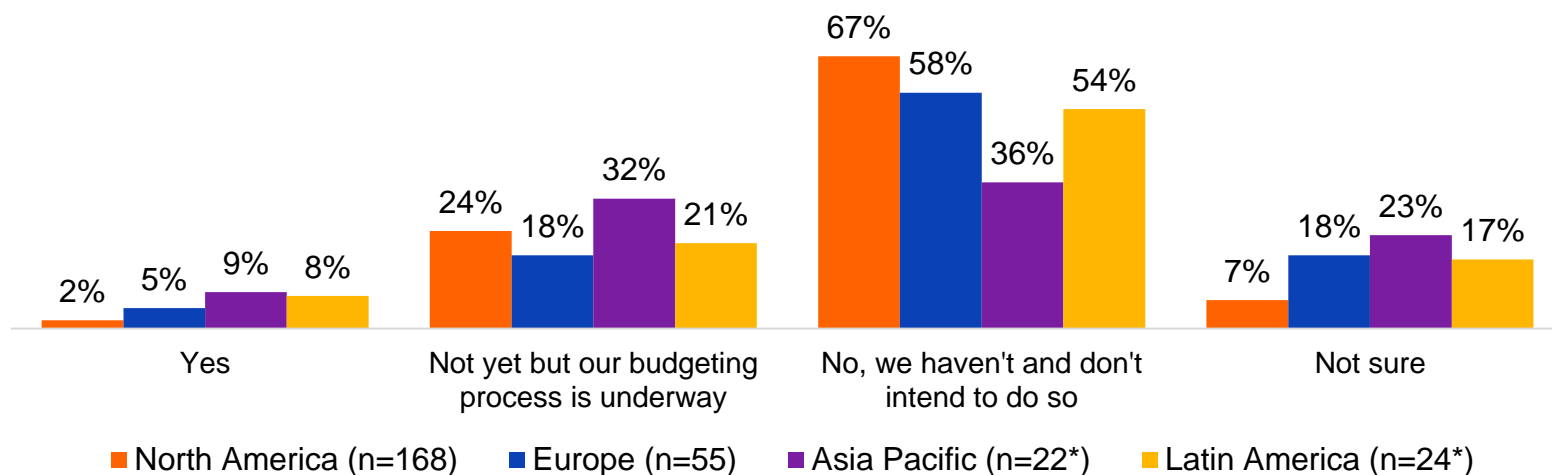


# The **Travel Buyer's** Perspective

## In Every Region, an Overwhelming Majority of Travel Programs Have Not Budgeted for Additional Servicing Costs

Have you budgeted for potential additional servicing costs for NDC-related bookings?

*travel buyers only by region*



Q. Have you budgeted for potential additional servicing costs for NDC-related bookings?

**Note: Question only displayed to travel buyers/procurement professionals**

**\*indicates small sample size in Asia Pacific and Latin America (n<30)**

In every region, fewer than ten percent of travel programs have budgeted for additional NDC-related servicing costs.



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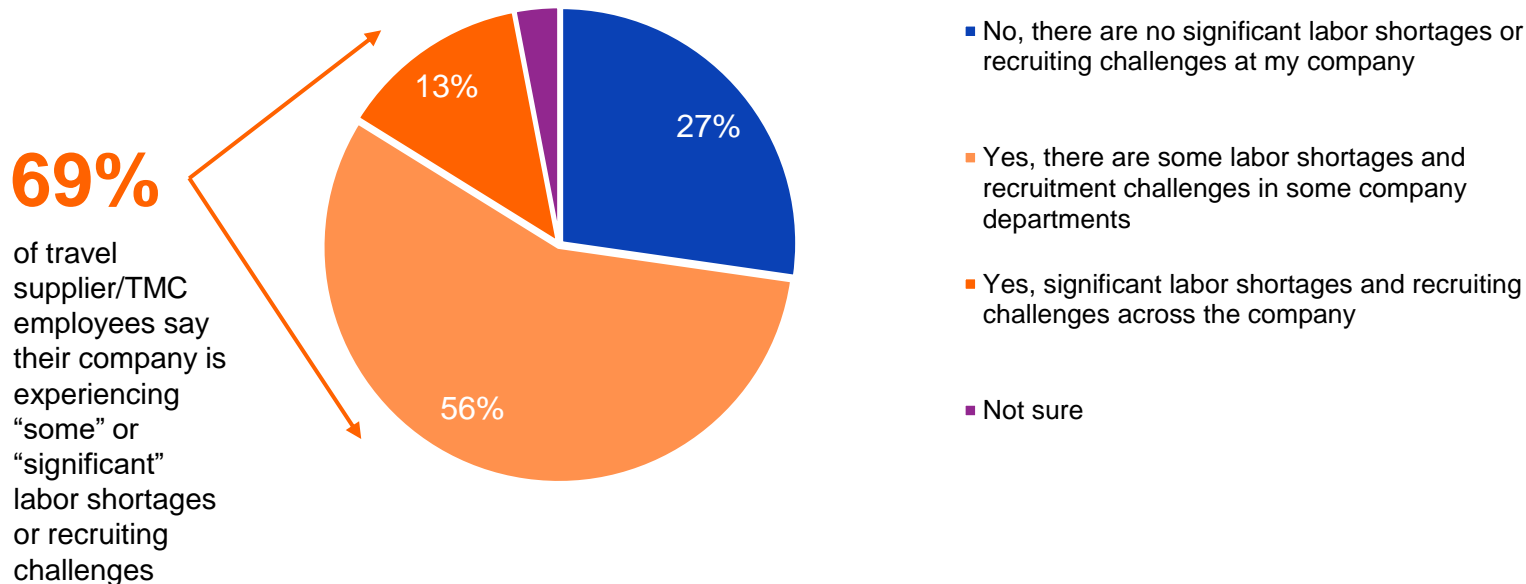
# The Post-Pandemic Business Travel Workforce



# The **Travel Supplier's** Perspective

## 7 in 10 Travel Suppliers Say Their Company Is Experiencing Labor Shortages/Recruitment Challenges

Is your company experiencing labor shortages and/or challenges recruiting staff?  
*results filtered to only show travel supplier/TMC employees*



Q. Is your company experiencing labor shortages and/or challenges?

**Note: Results filtered to only show travel supplier/TMC employees (n=306).**

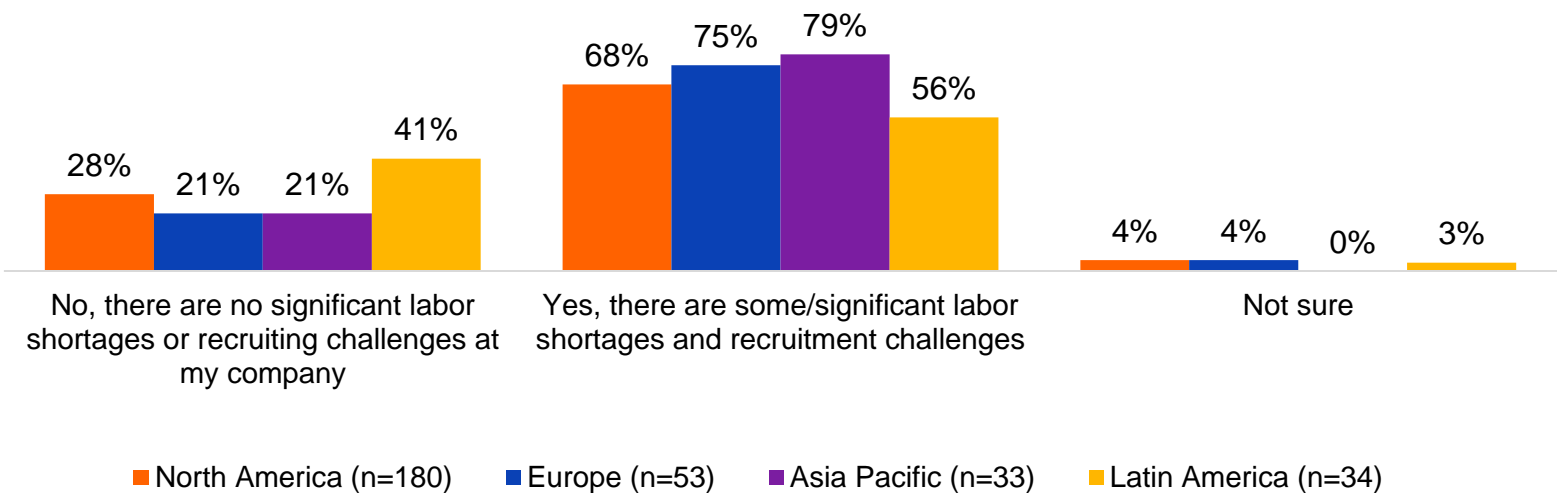
**The travel industry suffered massive layoffs at the height of the pandemic.** A lot of impacted employees found jobs outside of the industry. As travel made a stronger-than-expected comeback last year, travel *companies* remained understaffed. Low unemployment and rising wages worldwide have made it difficult to recruit new talent to the industry.

As the recovery continues, these challenges persist. Seven in 10 travel supplier/TMC employees (69%) say their company is experiencing at least some labor shortages or recruitment challenges in some departments. However, this includes only 13% who say their company is experiencing significant labor shortages and recruiting challenges.

# The **Travel Supplier's** Perspective

## Travel Companies Worldwide Face Labor Shortages and Recruiting Challenges

Is your company experiencing labor shortages and/or challenges recruiting staff?  
*travel suppliers by region*

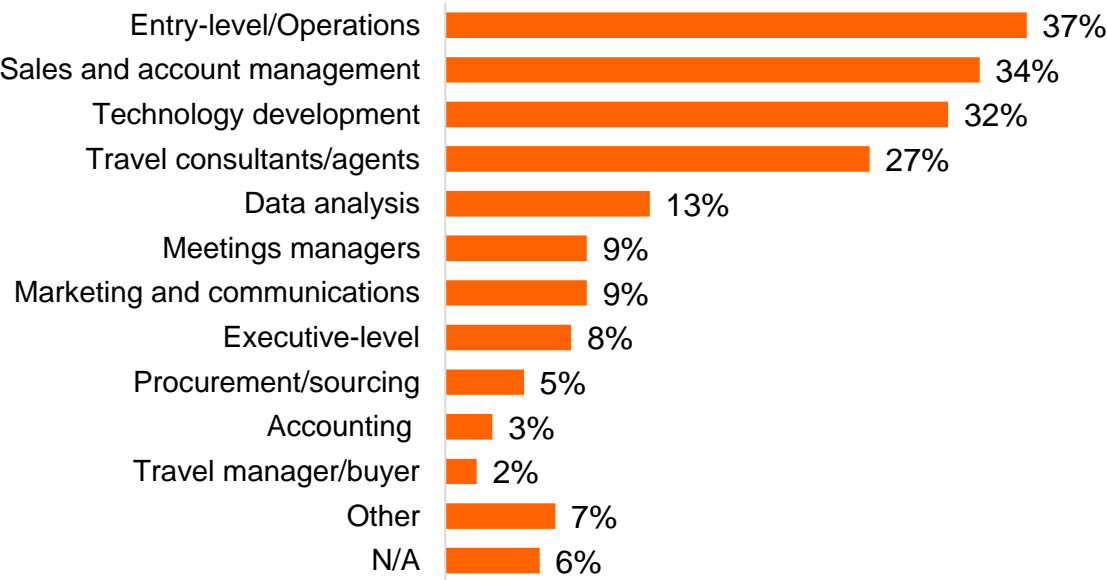


Q. Is your company experiencing labor shortages and/or challenges?  
**Note: Results filtered to only show travel supplier/TMC employees (n=306).**

**Travel companies worldwide face labor shortages and recruiting challenges.** In three of the four regions surveyed, at least two-thirds of travel supplier/TMC employees say their company faces at least some labor shortages and recruiting challenges. These include North America (68%), Europe (75%), and Asia Pacific (79%).

## What Are There Biggest Labor Gaps at Travel Companies?

What types of positions do you think are most needed at your company?  
Please select up to three.  
*results filtered to only show travel suppliers*



**Travel companies continue to face labor shortages.** However, some types of talent are needed more than others. Asked to pick up to three types of positions that their company needs the most, travel supplier/TMC employees commonly pick entry-level/operations (37%), sales and account management (34%), and technology development (32%).

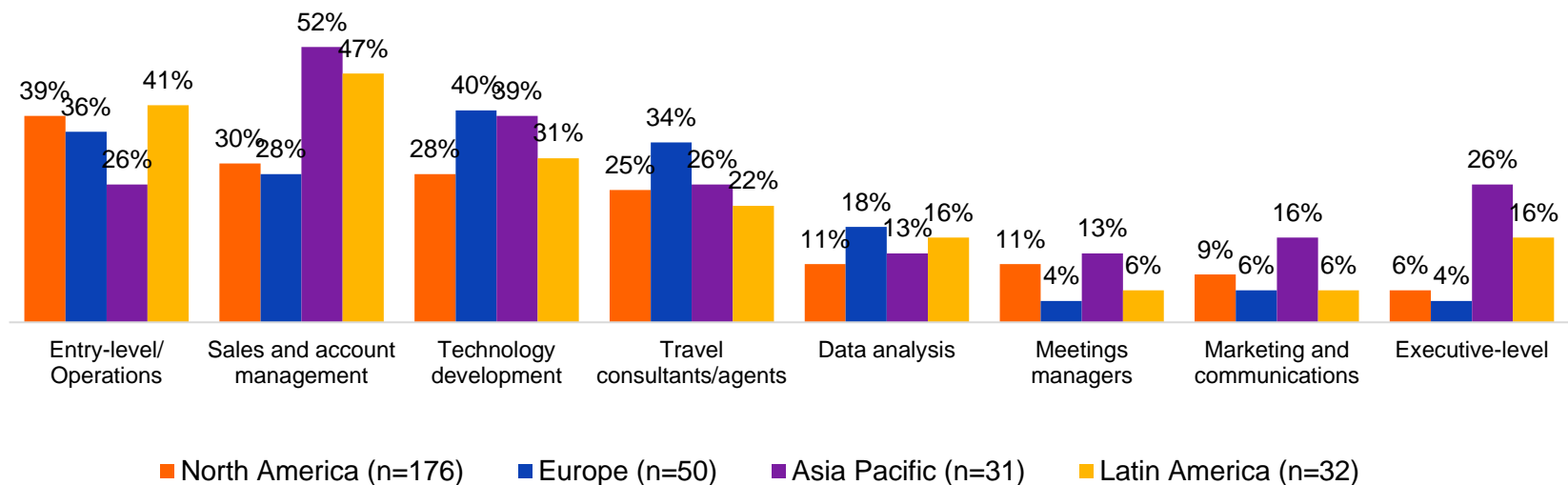
Q. What types of positions do you think are most needed at your company? Please select up to three.  
**Note: Results filtered to only show travel supplier/TMC employees (n=295).**



# The **Travel Supplier's** Perspective

## Are There Regional Differences When It Comes to the Types of Positions Needed?

What types of positions do you think are most needed at your company? Please select up to three.  
*travel buyers only by region*



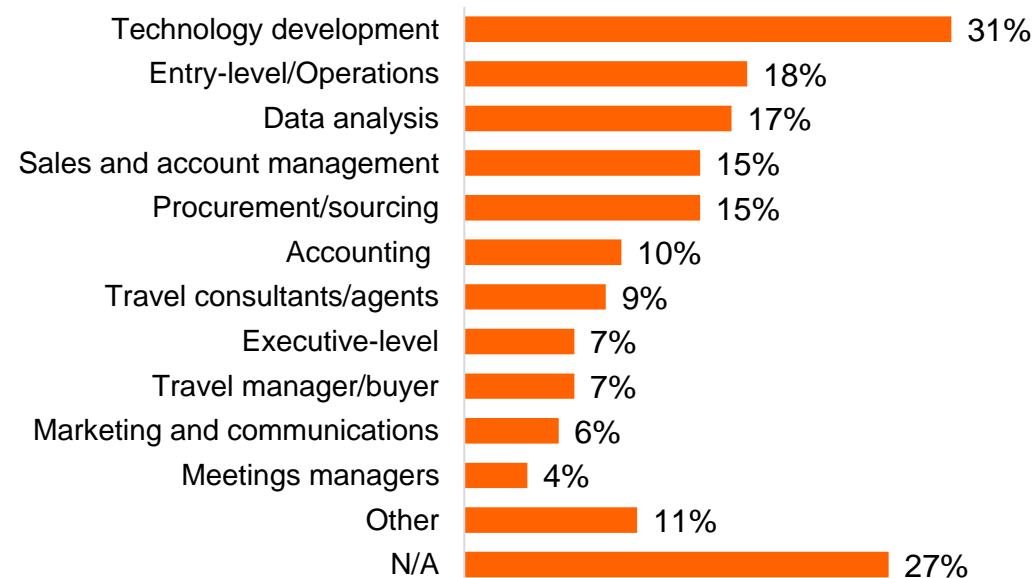
Q: What types of positions do you think are most needed at your company? Please select up to three

**Note: Results filtered to only show travel supplier/TMC employees**

There are some regional differences when it comes to the types of positions that travel companies need the most. Asia Pacific-based respondents are least likely to pick entry-level/operations as one of the top three positions their company needs the most. Asia Pacific and Latin America-based respondents are more likely to pick sales/account management as one of the top three positions their company needs the most.

## What Are There Biggest Labor Gaps at Buyer Companies?

What types of positions do you think are most needed at your company?  
Please select up to three.  
*results filtered to only show travel buyers*



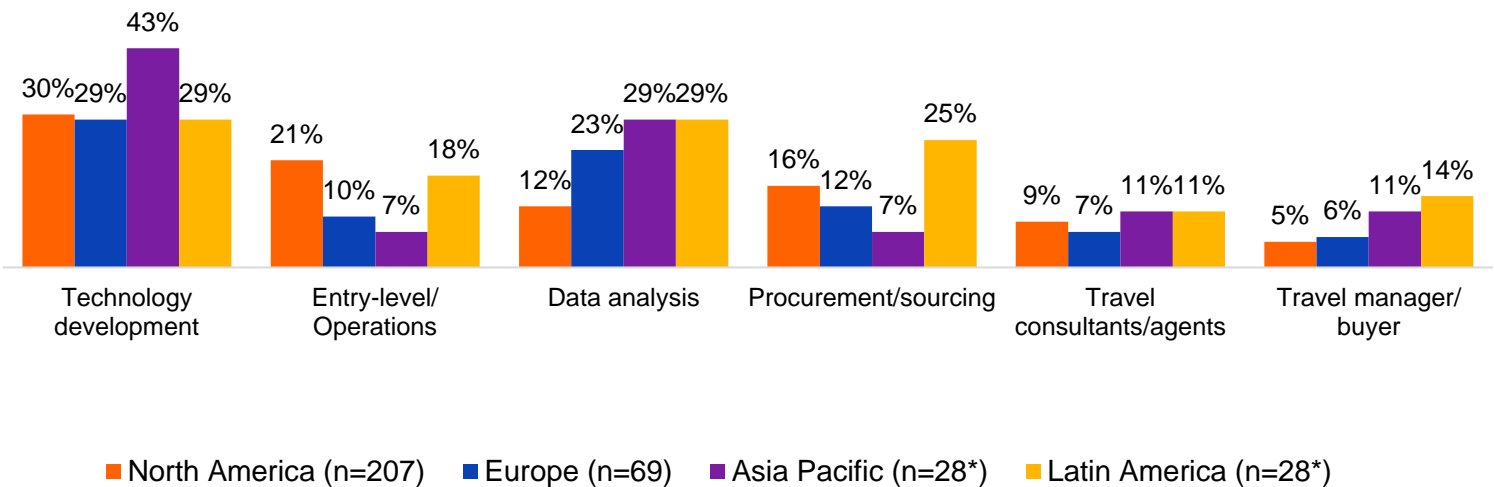
Q. Is your company experiencing labor shortages and/or challenges?  
**Note: Results filtered to only show travel buyers/procurement professionals (n=337).**

**Travel *buyers* were also asked about labor gaps at their own company.** Asked to pick up to three positions that their company needs the most, they most commonly pick technology development (31%). However, they do not appear to need additional help with their own job. Only 7% pick travel manager/buyer as one of the three positions that their company needs most.

# The **Travel Buyer's** Perspective

## Are There Regional Differences When It Comes to the Types of Positions Needed?

What types of positions do you think are most needed at your company? Please select up to three.  
*travel buyers only by region*



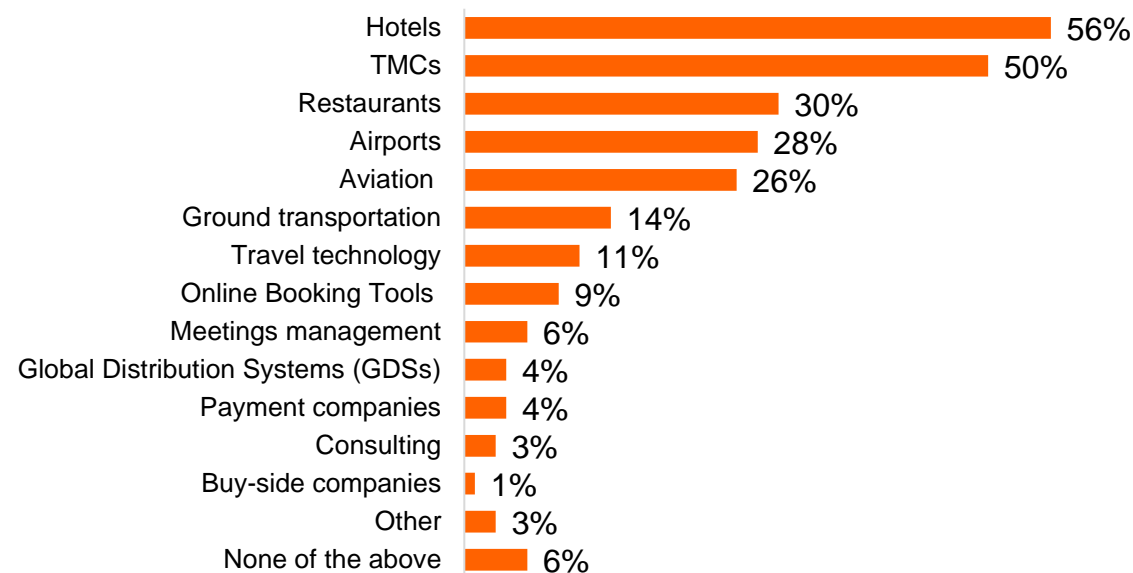
Q. What types of positions do you think are most needed at your company? Please select up to three.

**Note: Results filtered to only show travel buyers/procurement professionals**

There are not major regional differences when it comes to the types of positions travel buyers think their company needs most.

## Travel Buyers Think Hotels Are Struggling The Most With Workforce Recruitment and Retention

Which types of travel companies have the biggest gaps in terms of recruitment and retention?  
*results filtered to only show travel buyers*



Q. Regardless of the type of company you work for, which business travel sectors do you think have the biggest gap in terms of workforce recruitment and retention challenges? Please select up to three.

**Note: Results filtered to only show travel buyers/procurement professionals (n=316)**

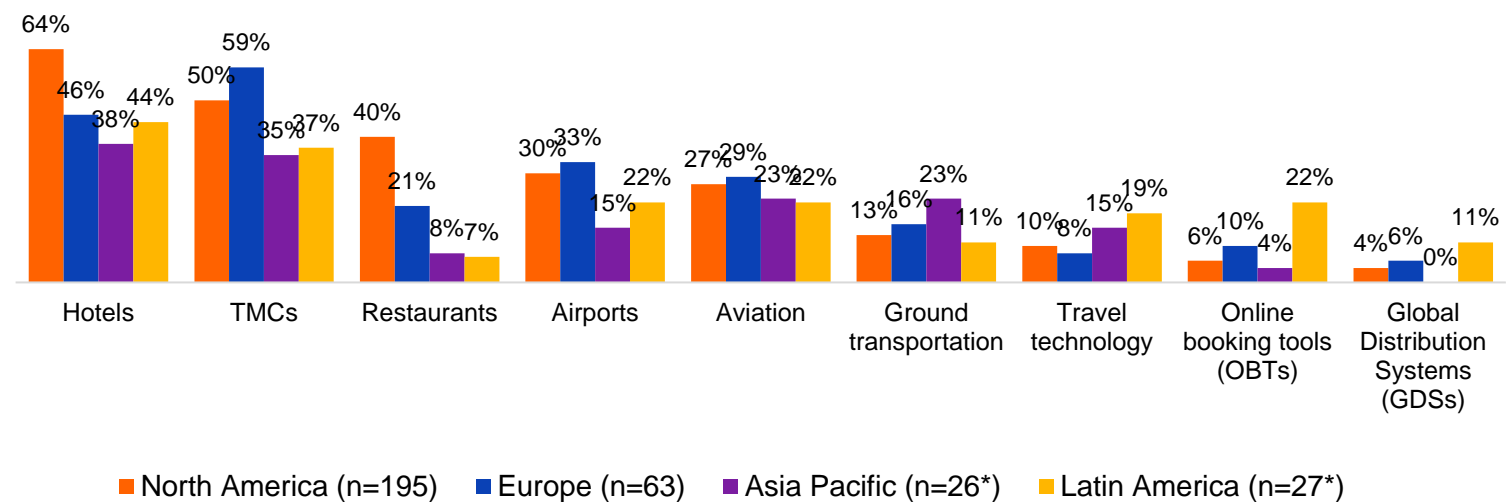
Travel buyers regularly interact different players in the business travel ecosystem – from hotel account managers to TMC support agents. This gives them a window to assess how much these suppliers are struggling with recruitment and retention. Are some types of suppliers having more difficulty than others?

Asked to pick up to three business travel-related companies that have the greatest workforce recruitment and retention challenges, buyers most commonly pick hotels (56%) followed by TMCs (50%) and restaurants (30%). Fewer pick aviation (26%) or ground transportation (30%).

# The Travel Buyer's Perspective

## Does Buyer Sentiment About Labor Gaps Vary by Region?

Which types of travel companies have the biggest gaps in terms of recruitment and retention?  
*travel buyers only by region*



**Buyer perceptions of labor gaps vary by region.** Almost two-thirds of North America-based buyers (64%) pick hotels as one of the three types of companies that have the biggest gap in terms of recruitment and retention. This is considerably higher than any other region. Europe-based buyers are most likely to pick TMCs as one of the three types of companies that have the biggest recruitment and retention challenges.

Q. Regardless of the type of company you work for, which business travel sectors do you think have the biggest gap in terms of workforce recruitment and retention challenges? Please select up to three.  
**Note: Results filtered to only show travel buyers/procurement professionals**  
**Note: Only select response options shown**



# Buyers and Suppliers Have Similar Perceptions of Recruitment Barriers

What are the biggest barriers that the global business travel industry faces in achieving a robust, diverse, and sustainable workforce?  
*% included in top 5*

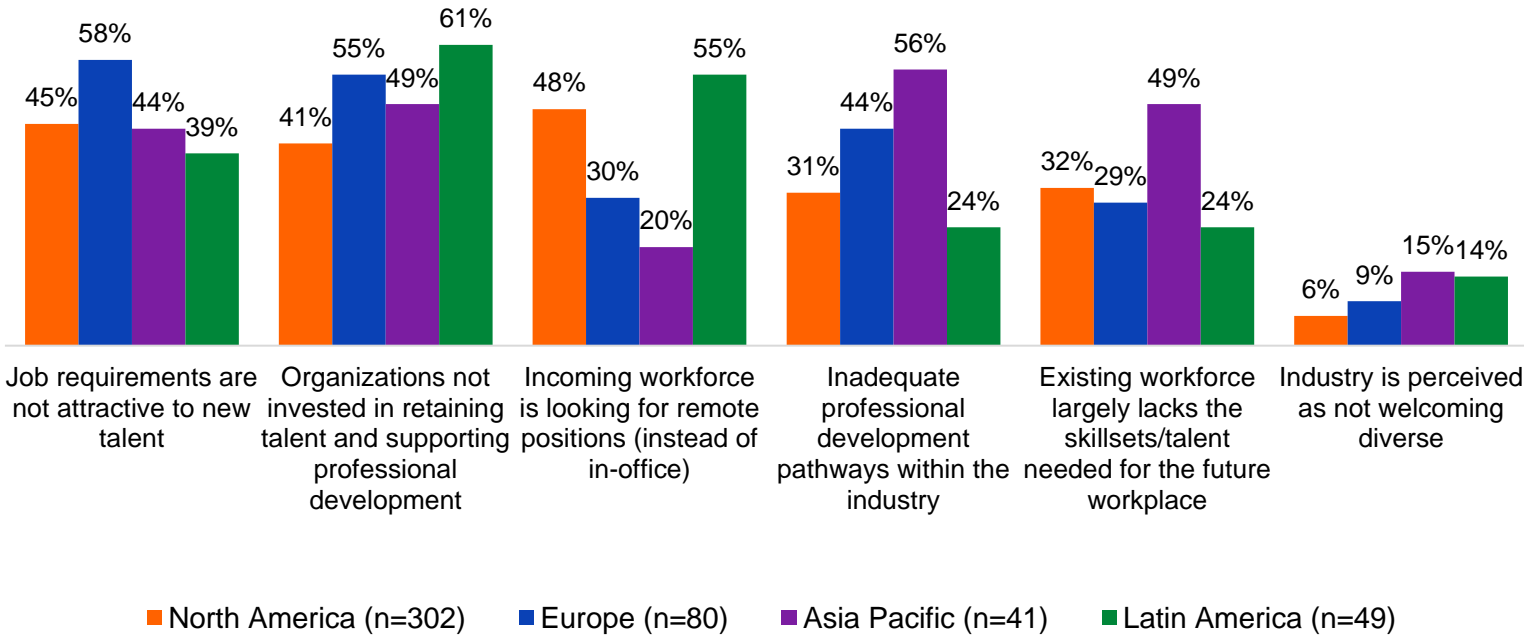


Buyers and suppliers have similar perceptions of recruitment barriers. Asked to pick up to five barriers that the travel industry faces in achieving a robust, diverse, and sustainable workforce, a large majority of both groups say “salary levels and benefits are not attractive to new talent.” Similarly, half of buyers (52%)—and a similar number of suppliers (49%)—pick “lack of qualifications with sufficient experience”—as one of their five biggest barriers.

Q. What are the biggest barriers that the global business travel industry faces in achieving a robust, diverse, and sustainable workforce? Please select up to five and rank them in order of importance with one being most important.

# There Are Regional Differences When It Comes to Recruitment Barriers

What are the biggest barriers that the global business travel industry faces in achieving a robust, diverse, and sustainable workforce?  
*% included in top 5 by region*



Q. What are the biggest barriers that the global business travel industry faces in achieving a robust, diverse, and sustainable workforce? Please select up to five and rank them in order of importance with one being most important.

**Note: only statistically significant differences (at the 95% confidence level) are shown**

**There are regional differences when it comes to recruitment barriers.** Asked to pick up to five barriers that the industry faces, respondents in Europe are most likely to pick “job requirements are not attractive to new talent.” Respondents in North America and Latin America are most likely to say the “incoming workforce is looking for remote positions.” Respondents in Asia Pacific are most likely to say there are “inadequate professional development pathways within the industry” or the “existing workforce largely lacks the skills/talent needed for the future workplace.”



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# Business Travel Disruptions/ Pain Points



# An Unpleasant Travel Experience Can Reduce Willingness to Travel

Would you say that travel disruptions or an unpleasant travel experience have...?

■ Not affected my willingness to travel for work   ■ Somewhat reduced my willingness   ■ Greatly reduced my willingness   ■ Not sure

**50%** say concerns about travel disruptions or an unpleasant travel experience have “somewhat” or “greatly” reduced their willingness to travel for work



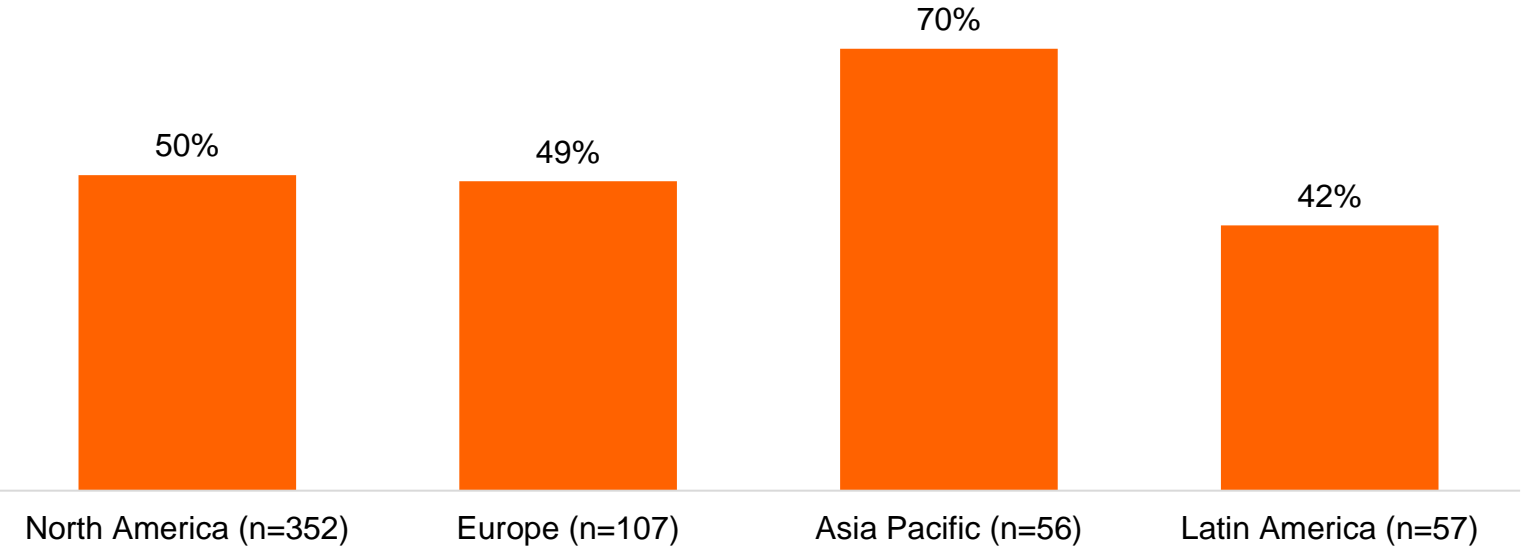
Q. Thinking about yourself specifically, would you say that concerns about travel disruptions or an unpleasant travel experience have...? **For purposes of this question, these concerns might include canceled or delayed flights, long airport security lines, crowded airports, or long lines to check your baggage at an airport or check in to a hotel, among other things.**

The past year-and-a-half has seen a remarkable surge in travel demand. At the same time, it has also heralded a more unpleasant travel experience. Pain points might include canceled or delayed flights, crowded airports, poor customer support, and long lines for security screenings or hotel check-in, among other things.

These pain points can hurt business travel. Almost half of business travel professionals (50%) say concerns about travel disruptions or an unpleasant travel experience have “greatly” (9%) or “somewhat” (41%) reduced their willingness to travel for work.

# Asia Pacific Respondents Are More Likely to Say Concerns About an Unpleasant Travel Experience Have Reduced Their Willingness to Travel

% who say concerns about travel disruptions or an unpleasant travel experience have “somewhat” or “greatly” reduced their willingness to travel for work  
*by region*



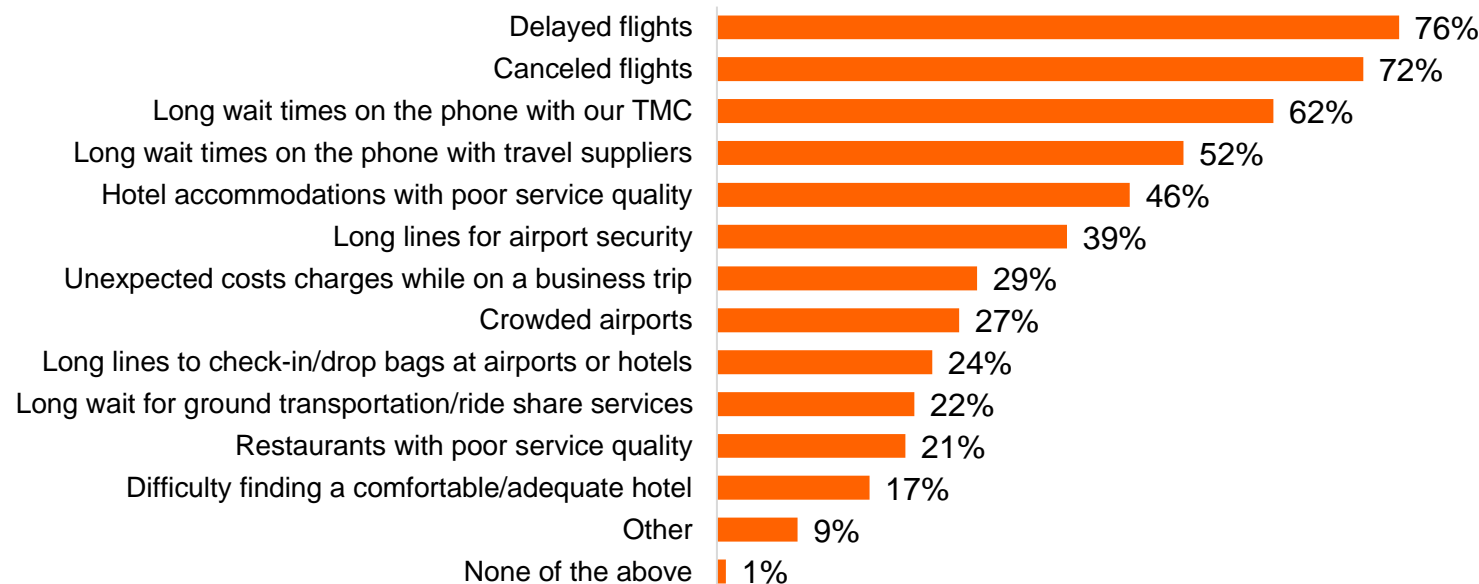
**An unpleasant travel experience hurts the most in Asia Pacific.** Seven in respondents in Asia Pacific say concerns about travel disruptions or an unpleasant travel experience have “somewhat” or “greatly” reduced their willingness to travel for work. This compares to half or fewer respondents in each of the three other regions.

Q. What are the biggest barriers that the global business travel industry faces in achieving a robust, diverse, and sustainable workforce? Please select up to five and rank them in order of importance with one being most important.

**Note: only statistically significant differences (at the 95% confidence level) are shown**

## Travel Managers Hear Complaints About Disruptions

Thinking about your role as a travel manager, have you frequently heard complaints from employees about the following? Please select all that apply.  
*buyers only*



Q. Thinking about your role as a travel manager, have you frequently heard complaints from employees about the following?  
Please select all that apply.

**Note: Question only displayed to travel buyers/procurement professionals (n=277)**

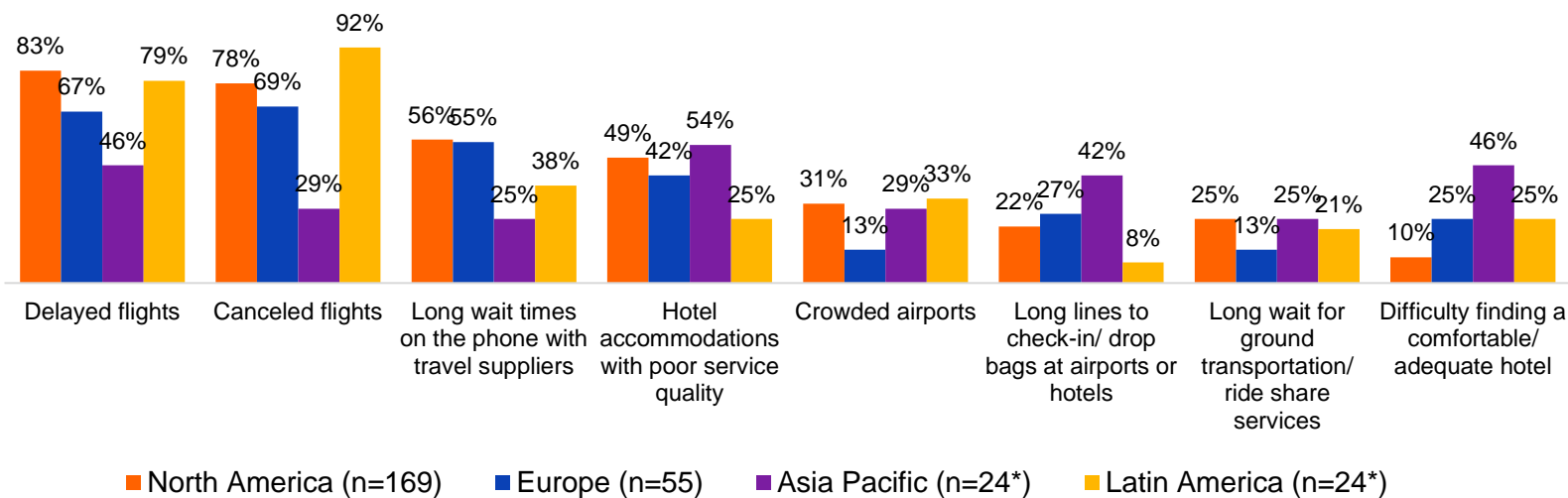
**Buyers hear complaints about travel disruptions and pain points.** A significant number of buyers say they frequently hear complaints from employees about delayed flights (72%), canceled flights (72%), long wait times on the phone with their TMC (62%), long wait times on the phone with suppliers (52%), and hotel accommodations with poor service quality (46%).



# The **Travel Buyer's** Perspective

## Do Complaints Vary by Region?

Thinking about your role as a travel manager, have you frequently heard complaints from employees about the following? Please select all that apply.  
*travel buyers only by region*



Across the world, buyers hear complaints about pain points that employees experience when they travel for work. However, the complaints vary by region. Buyers in North America and Latin America are most likely to hear complaints about canceled or delayed flights. Asia Pacific-based buyers are most likely to hear hotel-related complaints such as hotel accommodations with poor service quality or difficulty finding a comfortable/adequate hotel.

Q. Thinking about your role as a travel manager, have you frequently heard complaints from employees about the following?  
Please select all that apply.

**Note: Question only displayed to travel buyers/procurement professionals**  
**\*indicates small sample size for Asia Pacific and Latin America-based buyers (n<30)**  
**Note: Only options with significant differences (at the 95% confidence level) shown**



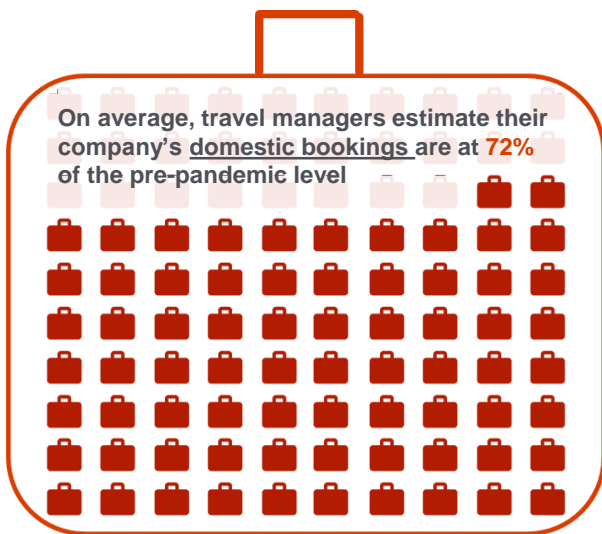
**GBTA** Global Business  
Travel Association

Many Voices. One Purpose.

# The State of Business Travel

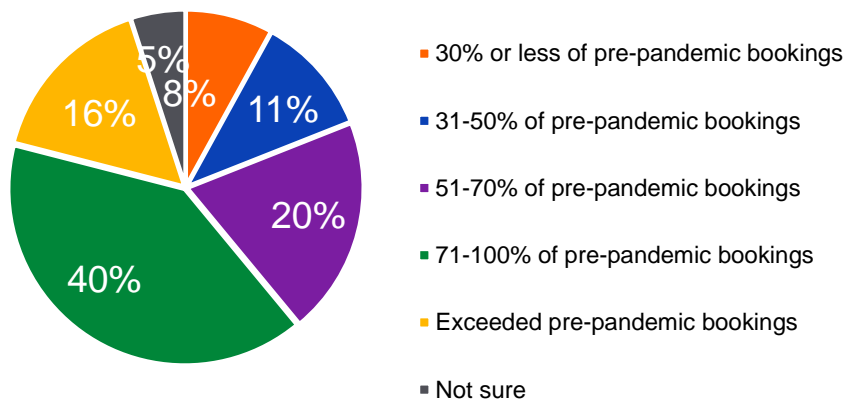


## The State of Domestic Business Travel



**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...?



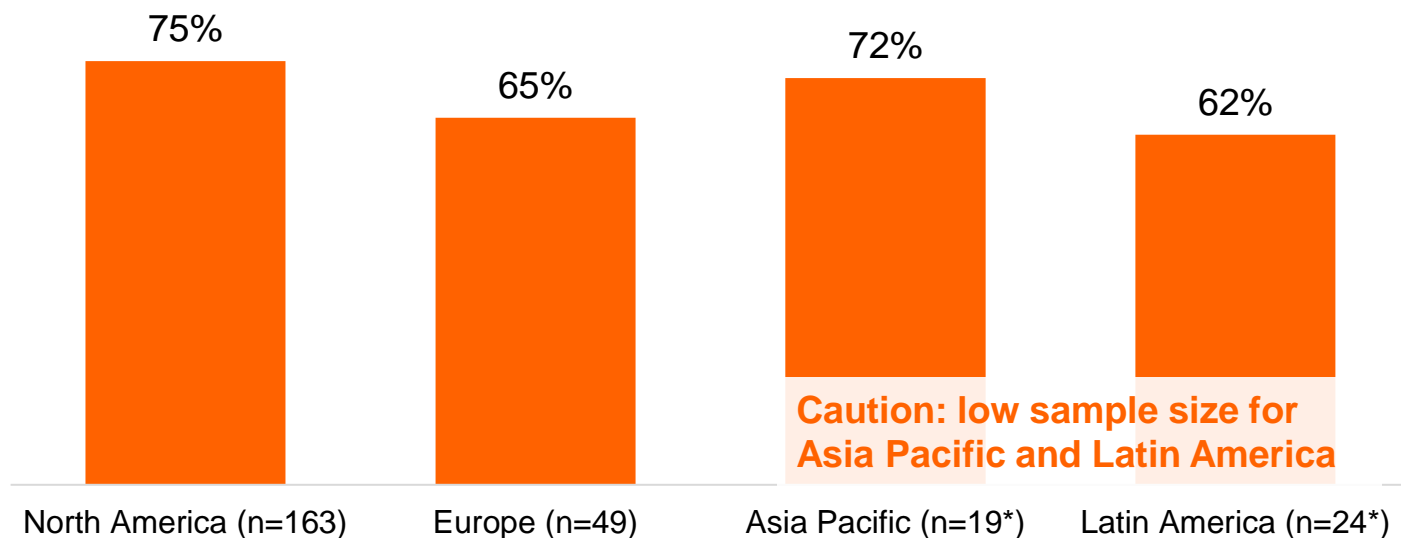
Q. Thinking about your company's current domestic business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine. Note: Question only displayed to travel buyers/procurement professionals (n=259).**

**The business travel recovery continues to inch forward.** On average, travel managers estimate their company's domestic bookings are at 72% of the pre-pandemic level. This is up from 67% in January 2023.

## The State of Domestic Business Travel (Cont.)

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

*estimated averages by region*



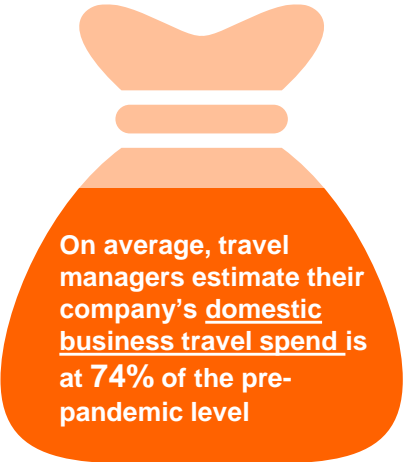
Q. Thinking about your company's current domestic business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

**Note: Question only displayed to travel managers/procurement professionals**

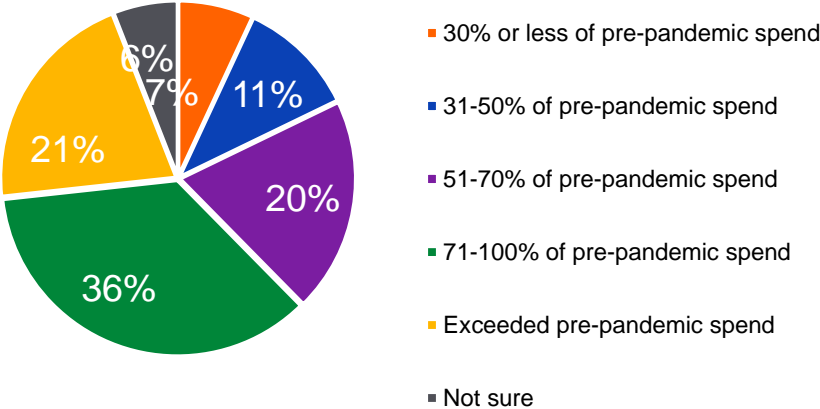
**\*indicates small sample size for travel buyers in Asia Pacific and Latin America**

**Europe's domestic recovery continues to slightly lag.** On average, Europe-based travel managers estimate their company's domestic business travel bookings have recovered to 65% of the pre-pandemic level. This remains slightly lower than the estimated average for North America (75%). However, Europe has seen stronger recovery of international bookings (see p. 9)

## The State of Domestic Business Travel (Cont.)



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



**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

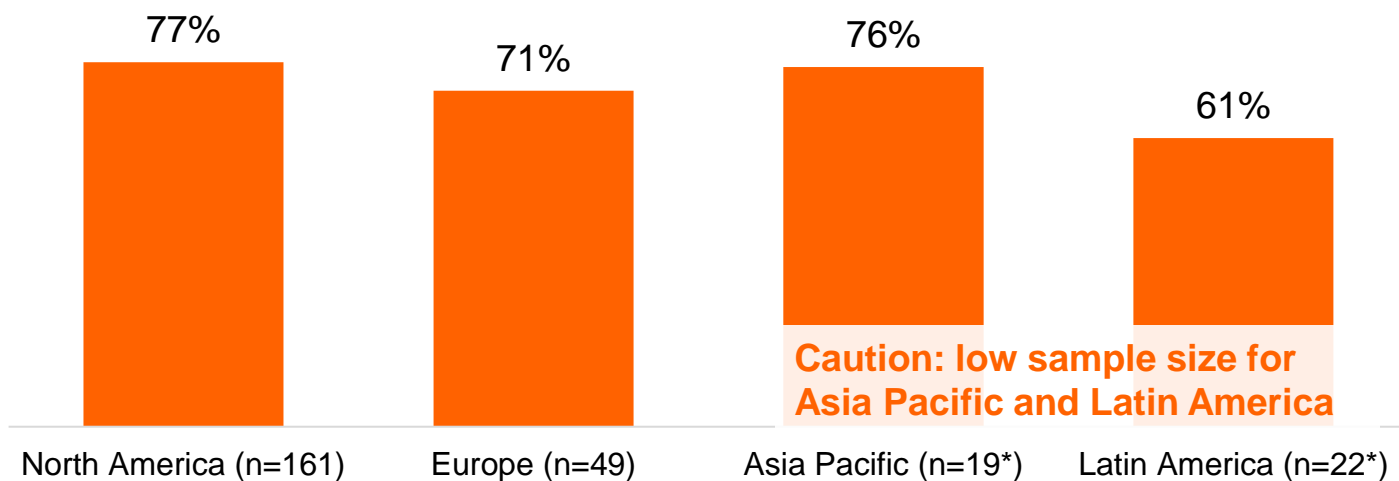
On average, travel managers estimate their company's domestic business travel spend is at 74% of the pre-pandemic level which is up six percentage points from the January, 2023 poll.

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=272).

## The State of Domestic Business Travel (Cont.)

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

*estimated averages by region*

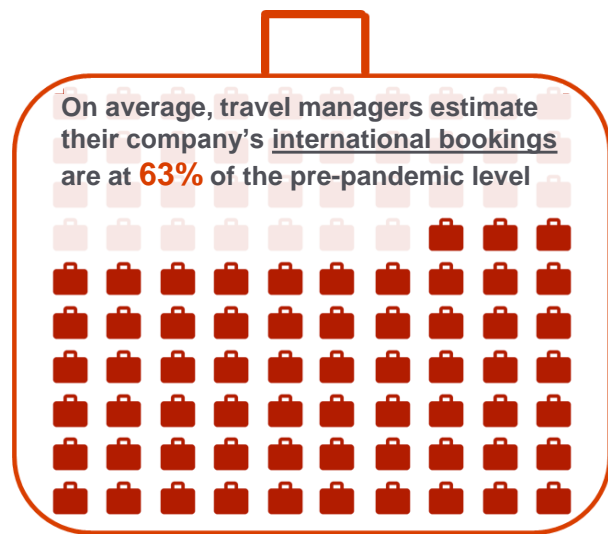


Q. Thinking about your company's current domestic business travel spend, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine.** Note: Question only displayed to travel buyers/procurement professionals (n=272).

**Europe's spend lags less than bookings.** On average, Europe-based travel managers estimate their company's domestic business travel spend has recovered to 71% of the pre-pandemic level. This compares to 77% in North America. The difference of six percentage points between the two regions is less than the difference of 10 percentage points in bookings. This could reflect high travel price inflation in Europe.

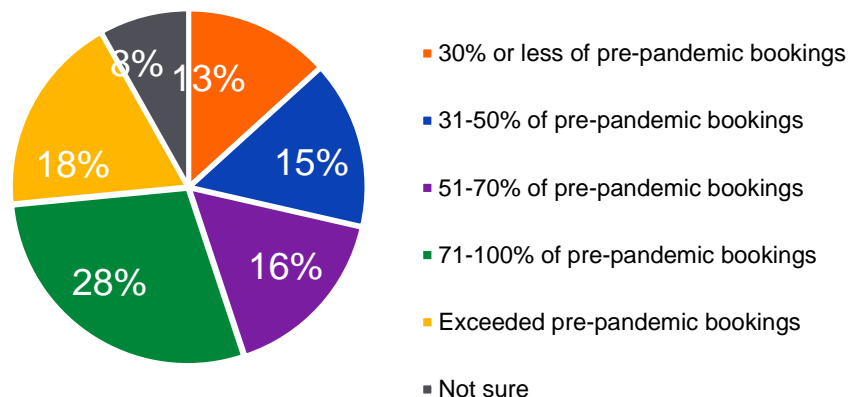


## The State of International Business Travel



**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...?

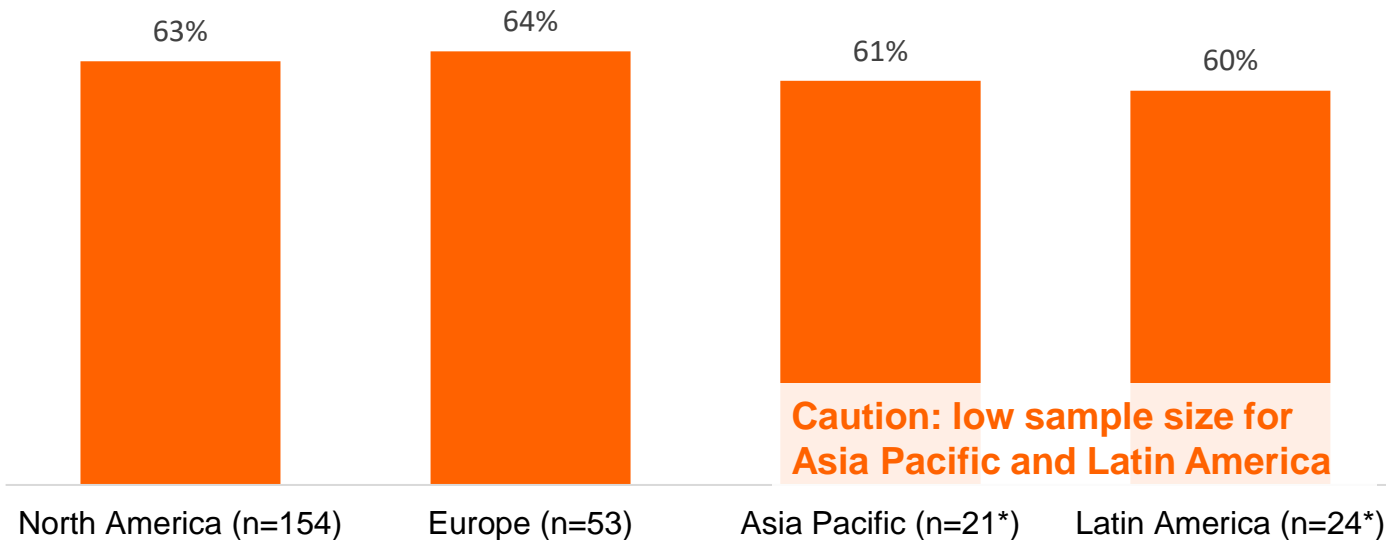


Q. Thinking about your company's current international business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine.** Note: Question only displayed to travel buyers/procurement professionals (n=248).

**The recovery of international business travel continues to gain steam.** On average, travel managers estimate their company's international bookings have recovered to 63% of the pre-pandemic level, up from 54% in January, 2023. This nine percentage point gain outpaces the gain in domestic bookings. In other words, while international business travel has recovered less than domestic travel, it has gained ground more quickly this year.

## 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**

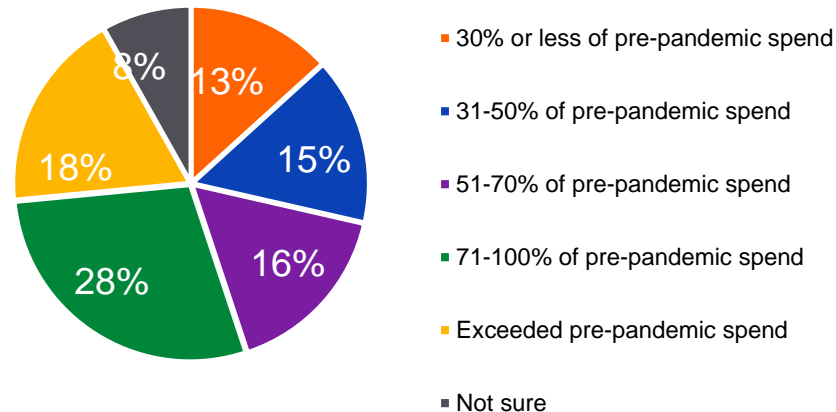
**North America's international recovery catches up to Europe.** In the January, 2023 GBTA Business Travel Outlook Poll, Europe's international recovery outpaced North America. In that poll, Europe-based travel managers estimated their company's *international* bookings had recovered to 60% of the pre-pandemic level on average. This was significantly higher than the average recovery in North America (50%). However, the current poll—conducted roughly three months later—tells a different story. While both regions continue to see recovery, North America has caught up to Europe. Travel managers in both regions estimate their company's international bookings have recovered to 68% of the pre-pandemic level on average.

# The **Travel Buyer's** Perspective

## The State of International Business Travel (Cont.)



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



**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

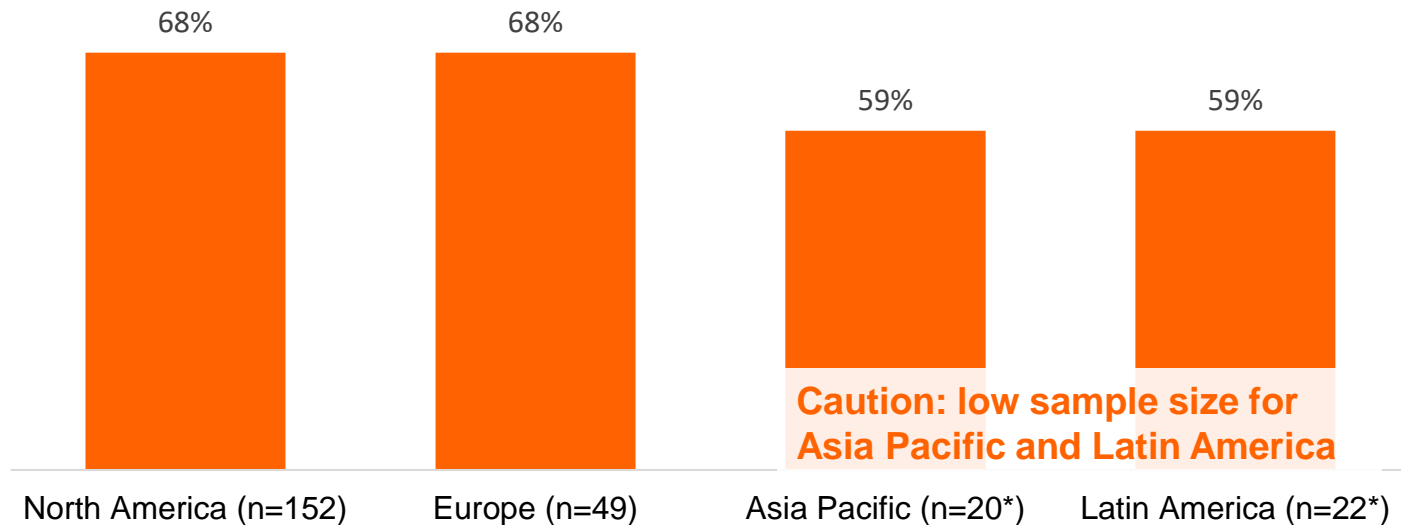
On average, travel managers estimate their company's international business travel *spend* has recovered to 66% of the pre-pandemic level.

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=248).

## 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 (n<30)**

Travel managers in Asia Pacific and Latin America estimate their company's international spend has recovered less, on average, than in North America and Europe. However, one caveat is that a small sample size was obtained for these two regions.