GBTA Business Travel Outlook Poll Results

April 26, 2022
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 10 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, 803 business travel professionals responded
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number
New Distribution Capability (NDC)
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.

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)
3 in 5 Travel Buyers Oppose a U.S. 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?

Travel buyer vs. supplier

<table>
<thead>
<tr>
<th></th>
<th>Travel manager/procurement professional (n=277)</th>
<th>30%</th>
<th>36%</th>
<th>60%</th>
<th>36%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am not familiar with NDC</td>
<td></td>
<td>11%</td>
<td></td>
<td>29%</td>
<td></td>
</tr>
</tbody>
</table>

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?
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

<table>
<thead>
<tr>
<th>Region</th>
<th>Support for NDC</th>
<th>Do not Support for NDC</th>
<th>Not Familiar with NDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>29%</td>
<td>71%</td>
<td>30%</td>
</tr>
<tr>
<td>Europe</td>
<td>44%</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>29%</td>
<td>71%</td>
<td>32%</td>
</tr>
<tr>
<td>Latin America</td>
<td>18%</td>
<td>82%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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?
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.

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?

- Yes, positively impacted (6%)
- Yes, negatively impacted (28%)
- No (36%)
- Not sure (29%)

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)
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

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

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Yes, positively impacted</th>
<th>Yes, negatively impacted</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America (n=170)</td>
<td>26%</td>
<td>34%</td>
<td>29%</td>
<td>17%</td>
</tr>
<tr>
<td>Europe (n=55)</td>
<td>55%</td>
<td>17%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Asia Pacific (n=23*)</td>
<td>13%</td>
<td>24%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Latin America (n=24*)</td>
<td>26%</td>
<td>30%</td>
<td>42%</td>
<td>30%</td>
</tr>
</tbody>
</table>

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)
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?

- We have started to implement NDC without experiencing any challenges
- We have started to implement NDC, and the transition has largely gone smoothly – but we have experienced a few challenges
- We have experienced some challenges when it comes to NDC implementation
- We have experienced many challenges when it comes to NDC implementation
- We have not started to implement NDC
- It is too early to say
- Not sure

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 (n=273)
There Are Not Major Regional Differences In Buyer Opinions About NDC Implementation

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.
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.

Q. Thinking about your company’s ability to distribute NDC content to your corporate clients, which statement best represents your experience? (n=95)

- It has gone smoothly - we have made NDC content available to clients without experiencing any challenges
- It has mostly gone smoothly - we have made NDC content available to clients and the transition has largely gone smoothly – but we have experienced a few challenges
- We have experienced some challenges when it comes to NDC content distribution
- We have experienced many challenges when it comes to NDC content distribution
- We have largely not made NDC content available to corporate clients
- It is too early to say
- Not sure

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>53%</td>
<td>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</td>
</tr>
<tr>
<td>29%</td>
<td>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</td>
</tr>
<tr>
<td>17%</td>
<td>Don’t know/Not sure/Other</td>
</tr>
</tbody>
</table>

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

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

- North America (n=167)
- Europe (n=55)
- Asia Pacific (n=22*)
- Latin America (n=24*)

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.
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

- Yes: 17%
- No: 81%
- Not sure: 3%

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)

*indicates small sample size for buyers in Asia Pacific and Latin America (n<30)
Regardless of Region, Travel Buyers Feel They Need More Information and Education About NDC

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.

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

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.

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

- Yes: 32%
- No: 50%
- Not sure: 18%

Note: Question only displayed to travel buyers/procurement professionals (n=276)
Across the World, a Similar Number of Buyers Say Their TMC Needs More Information About NDC

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

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.

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

Note: Question only displayed to travel buyers/procurement professionals (n=274)
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*

<table>
<thead>
<tr>
<th>Region</th>
<th>Yes</th>
<th>Not yet but our budgeting process is underway</th>
<th>No, we haven’t and don’t intend to do so</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America (n=168)</td>
<td>2%</td>
<td>5%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Europe (n=55)</td>
<td>24%</td>
<td>18%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Asia Pacific (n=22*)</td>
<td>67%</td>
<td>58%</td>
<td>36%</td>
<td>54%</td>
</tr>
<tr>
<td>Latin America (n=24*)</td>
<td>7%</td>
<td>18%</td>
<td>23%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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)*
The Post-Pandemic Business Travel Industry Workforce
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.

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

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

<table>
<thead>
<tr>
<th>Region</th>
<th>No, there are no significant labor shortages or recruiting challenges at my company</th>
<th>Yes, there are some/significant labor shortages and recruitment challenges</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>28%</td>
<td>68%</td>
<td>4%</td>
</tr>
<tr>
<td>Europe</td>
<td>21%</td>
<td>75%</td>
<td>4%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>21%</td>
<td>79%</td>
<td>0%</td>
</tr>
<tr>
<td>Latin America</td>
<td>41%</td>
<td>56%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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%).
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%).
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

<table>
<thead>
<tr>
<th>Position</th>
<th>North America (n=176)</th>
<th>Europe (n=50)</th>
<th>Asia Pacific (n=31)</th>
<th>Latin America (n=32)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry-level/Operations</td>
<td>39% 36% 26%</td>
<td>30% 28% 26%</td>
<td>52% 47% 39%</td>
<td>28% 25% 22%</td>
</tr>
<tr>
<td>Sales and account management</td>
<td>41% 40% 34%</td>
<td>40% 39% 31%</td>
<td>40% 39% 34%</td>
<td>31% 29% 27%</td>
</tr>
<tr>
<td>Technology development</td>
<td>26% 28% 11%</td>
<td>25% 22% 11%</td>
<td>26% 18% 16%</td>
<td>22% 16% 13%</td>
</tr>
<tr>
<td>Travel consultants/agents</td>
<td>11% 18% 16%</td>
<td>11% 13% 6%</td>
<td>11% 13% 6%</td>
<td>13% 6% 6%</td>
</tr>
<tr>
<td>Data analysis</td>
<td>2% 4% 9%</td>
<td>6% 4% 6%</td>
<td>9% 6% 6%</td>
<td>16% 9% 6%</td>
</tr>
<tr>
<td>Meetings managers</td>
<td>13% 6% 6%</td>
<td>6% 6% 6%</td>
<td>6% 6% 6%</td>
<td>16% 6% 6%</td>
</tr>
<tr>
<td>Marketing and communications</td>
<td>9% 16% 6%</td>
<td>16% 16% 6%</td>
<td>6% 16% 6%</td>
<td>16% 16% 6%</td>
</tr>
<tr>
<td>Executive-level</td>
<td>16% 16% 11%</td>
<td>16% 16% 11%</td>
<td>16% 16% 11%</td>
<td>16% 16% 11%</td>
</tr>
</tbody>
</table>

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
Note: Only selected response options shown
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.

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

Note: Results filtered to only show travel buyers/procurement professionals (n=337).
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.

type buyers only by region

<table>
<thead>
<tr>
<th>Position</th>
<th>North America (n=207)</th>
<th>Europe (n=69)</th>
<th>Asia Pacific (n=28*)</th>
<th>Latin America (n=28*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology development</td>
<td>30% 29%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entry-level/Operations</td>
<td>21% 10% 7%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data analysis</td>
<td>18% 18%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Procurement/sourcing</td>
<td>16% 12% 7%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel consultants/agents</td>
<td>9% 7% 11% 11%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel manager/buyer</td>
<td>5% 6% 11% 14%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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
Travel buyers regularly interact with 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%).

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)
Does Buyer Sentiment About Labor Gaps Vary 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

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Travel Buyers (n=242)</th>
<th>Travel Suppliers/TMCs (n=242)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary levels and benefits are not attractive to new talent</td>
<td>66%</td>
<td>72%</td>
</tr>
<tr>
<td>Lack of candidates with sufficient qualifications or experience</td>
<td>52%</td>
<td>49%</td>
</tr>
<tr>
<td>Job requirements are not attractive to new talent</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>Organizations not invested in retaining talent and supporting professional development</td>
<td>46%</td>
<td>47%</td>
</tr>
<tr>
<td>Hiring and training required for new professionals coming from outside the travel industry</td>
<td>43%</td>
<td>47%</td>
</tr>
<tr>
<td>Incoming workforce is looking for remote positions (instead of in-office)</td>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td>Inadequate professional development pathways within the industry</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Inadequate budget for new roles</td>
<td>35%</td>
<td>39%</td>
</tr>
<tr>
<td>Existing workforce largely lacks the skillsets/talent needed for the future workplace</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>Industry is perceived as not welcoming diverse candidates</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Incoming workforce is looking for in-office positions (instead of remote)</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Barrier</th>
<th>North America (n=302)</th>
<th>Europe (n=80)</th>
<th>Asia Pacific (n=41)</th>
<th>Latin America (n=49)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job requirements are not attractive to new talent</td>
<td>44%</td>
<td>44%</td>
<td>61%</td>
<td>58%</td>
</tr>
<tr>
<td>Organizations not invested in retaining talent and supporting</td>
<td>55%</td>
<td>55%</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>professional development</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incoming workforce is looking for remote positions (instead of in-office)</td>
<td>48%</td>
<td>30%</td>
<td>20%</td>
<td>48%</td>
</tr>
<tr>
<td>Inadequate professional development pathways within the industry</td>
<td>55%</td>
<td>55%</td>
<td>56%</td>
<td>49%</td>
</tr>
<tr>
<td>Existing workforce largely lacks the skills/talent needed for the future workplace</td>
<td>56%</td>
<td>32%</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>Industry is perceived as not welcoming diverse</td>
<td>6%</td>
<td>9%</td>
<td>15%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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.”
Business Travel Disruption and 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

48% 41% 9%

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 (n=583)

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

An unpleasant travel experience hurts the most in Asia Pacific. Seven in 10 respondents (70%) 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.

<table>
<thead>
<tr>
<th>Region</th>
<th>% who say concerns about travel disruptions or an unpleasant travel experience have “somewhat” or “greatly” reduced their willingness to travel for work</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>50%</td>
</tr>
<tr>
<td>Europe</td>
<td>49%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>70%</td>
</tr>
<tr>
<td>Latin America</td>
<td>42%</td>
</tr>
</tbody>
</table>

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
Buyers hear complaints about travel disruptions and pain points. A significant number of buyers say they frequently hear complaints from employees about delayed flights (76%), 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%).
Do Complaints Vary 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.
The State of Business Travel
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.

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.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Estimated Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America (n=163)</td>
<td>75%</td>
</tr>
<tr>
<td>Europe (n=49)</td>
<td>65%</td>
</tr>
<tr>
<td>Asia Pacific (n=19*)</td>
<td>72%</td>
</tr>
<tr>
<td>Latin America (n=24*)</td>
<td>62%</td>
</tr>
</tbody>
</table>

*Caution: low sample size for Asia-Pacific and Latin America*

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).
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).
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.

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 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 percent 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.

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 Travel Buyer’s Perspective

The State of International Business Travel (Cont.)

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.

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

Caution: low sample size for Asia-Pacific and Latin America

The Travel Buyer’s Perspective

The State of International Business Travel (Cont.)

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.

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

Caution: low sample size for Asia-Pacific and Latin America
The **Travel Buyer’s Perspective**

The State of International Business Travel (Cont.)

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

- 30% or less of pre-pandemic spend
- 31-50% of pre-pandemic spend
- 51-70% of pre-pandemic spend
- 71-100% of pre-pandemic spend
- Exceeded pre-pandemic spend
- Not sure

On average, travel managers estimate their company’s international business travel spend is at 66% of the pre-pandemic level.

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.

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

estimated averages by region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>68%</td>
</tr>
<tr>
<td>Europe</td>
<td>68%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>59%</td>
</tr>
<tr>
<td>Latin America</td>
<td>59%</td>
</tr>
</tbody>
</table>

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)