Methodology

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

- Data collection from September 20 through September 26, 2022
- An email invitation was sent to 16,386 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, 594 business travel professionals responded
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number
The State of Business Travel
The State of Business Travel
October 2022

- 69% plan to resume domestic business travel in the near future (1-3 months)
- 44% plan to resume international business travel in the near future (1-3 months)

14% of companies have canceled or suspended most or all domestic business trips
32% of companies have canceled or suspended most or all international business trips
The State of Domestic Business Travel

% of companies allowing some or more domestic business travel within their country

Note: Small sample size for Latin America-based respondents in recent polls (n<30)
Percentages calculated by subtracting the percentage who have canceled or suspended “most” or “all” business trips from 100
0% 20% 40% 60% 80% 100%


% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*

All companies  U.S.-based companies  Canada-based  Europe-based companies  Latin America-based companies

69%

61% average since Oct 2021

*Figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country

Note: Small sample size for Canada, Europe, and Latin America-based respondents (n<30)
On average, travel managers say their company’s domestic business travel bookings have recovered to 63% of the pre-pandemic level. Only one-quarter (27%) say their domestic bookings are below 50% of the pre-pandemic level. Two in five (43%) say their domestic bookings have exceeded 70% of the pre-pandemic level.

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=278).
Business travel recovery gains steam worldwide. On average, North America-based travel managers estimate their company’s domestic business travel bookings have recovered to 63% of the pre-pandemic level. This is similar to the average for Europe-based travel managers (61%).

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Domestic Bookings</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>63%</td>
</tr>
<tr>
<td>Europe</td>
<td>61%</td>
</tr>
<tr>
<td>Latin America</td>
<td>53%</td>
</tr>
</tbody>
</table>

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.

*indicates small sample size for Latin America (n<30)
The State of International Business Travel

% of companies allowing some or more international business travel

Note: Small sample size for Latin America-based respondents in recent polls (n<30)
Percentages calculated by subtracting the percentage who have canceled or suspended “most” or “all” business trips from 100
The State of International Business Travel (Cont.)

% of companies that plan to resume international business travel in the near future (next 1-3 months)*

*Figures are among those that indicated their company has canceled or suspended most or all international business trips
Note: Small sample size for Canada and Latin America-based respondents in recent polls (n<30)
During the recovery, international business travel has significantly lagged domestic travel. Recently, it has closed the gap. On average, travel buyers say their company’s international business travel bookings have recovered to 50% of the pre-pandemic level. More than one-quarter (26%) say their international bookings exceed 70% of the pre-COVID level.

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.
There is little difference in the pace of recovery of international business travel across regions. On average, North America and Europe-based travel managers estimate their company’s international bookings have recovered to roughly half of the pre-pandemic level.

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

- North America (n=198): 49%
- Europe (n=56): 53%
- Latin America (n=9*): 44%

*indicates small sample size for Latin America (n<30)

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.

GBTA
Supplier Bookings Continue to Climb

How have bookings from corporate customers changed in the past month?

- Our bookings have decreased
- Our bookings have remained the same
- Our bookings have increased

<table>
<thead>
<tr>
<th>Month</th>
<th>Decreased</th>
<th>Remained</th>
<th>Increased</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2022</td>
<td>6%</td>
<td>15%</td>
<td>79%</td>
</tr>
<tr>
<td>June 2022</td>
<td>5%</td>
<td>11%</td>
<td>84%</td>
</tr>
<tr>
<td>April 2022</td>
<td>7%</td>
<td>5%</td>
<td>88%</td>
</tr>
<tr>
<td>February 2022</td>
<td>35%</td>
<td>20%</td>
<td>45%</td>
</tr>
<tr>
<td>January 2022</td>
<td>60%</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>October 2021</td>
<td>19%</td>
<td>27%</td>
<td>55%</td>
</tr>
<tr>
<td>September 2021</td>
<td>38%</td>
<td>30%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Note: Question only displayed to respondents who work for an airline, hotel chain, hotel property, TMC, or ground transportation company

Q. You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past month? (n=137-218)

While business travel largely returned in the first half of the year, there is still room for continued recovery. Four in five travel suppliers (79%) say their bookings from corporate customers increased in the past month.
Companies Widely Allow Non-Essential Business Travel

Almost 9 in 10 respondents (86%) say their company at least sometimes allows non-essential domestic business travel. Three-quarters (74%) say their company at least sometimes allows non-essential international business travel.

Q. Which of the following best describes your company’s current position on employees traveling for business? (n=497-539)

Note: Some respondents indicated “Not applicable/Not sure.” These responses were excluded from calculations.
North American Companies Slightly More Likely to Allow Non-Essential Domestic Trips

North American travel programs are more likely to allow non-essential domestic trips. Almost nine in 10 North America-based respondents (88%) say their company “sometimes” or “usually” allows these trips. This compares to four in five (80%) Europe-based respondents.

<table>
<thead>
<tr>
<th>Company's current position on employees traveling for business</th>
<th>% “usually” or “sometimes” allowed by region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-essential domestic business trips</td>
<td>North America (n=374) 88%</td>
</tr>
<tr>
<td></td>
<td>Europe (n=92) 73%</td>
</tr>
<tr>
<td></td>
<td>Latin America (n=12*) 92%</td>
</tr>
<tr>
<td>Non-essential international business trips</td>
<td>North America (n=374) 85%</td>
</tr>
<tr>
<td></td>
<td>Europe (n=92) 76%</td>
</tr>
<tr>
<td></td>
<td>Latin America (n=12*) 92%</td>
</tr>
</tbody>
</table>

Q. Which of the following best describes your company’s current position on employees traveling for business?

*small sample size for Latin America (n<30)
Few Companies Cancel or Suspend Business Trips

32% of companies have canceled or suspended most (23%) or all (9%) international trips.

14% of companies have canceled or suspended most (10%) or all (4%) domestic travel within their own country.

Q. Thinking about your company, how has the coronavirus impacted business travel to...? (n=384-449)

Are companies planning to resume travel to...?

- Do not plan to resume travel in near future
- Have considered resuming travel in near future, but no definite plans
- Plan to resume travel in near future (1-3 months)
- Not sure

Q. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

Note: Respondents only asked about countries/regions where they indicated their company has canceled or suspended most or all business travel (n=55-115)
Key Highlights
Three-Quarters of Travel Managers (78%) Expect Their Company Will Take More Business Trips Next Year

What Do Travel Managers Expect for Next Year?

0%
We expect the number of business trips taken by employees will be much lower than it was this year

2%
We expect the number of business trips taken by employees will be lower than it was this year

17%
We expect the number of business trips taken by employees will be similar as than it was this year

17%
We expect the number of business trips taken by employees will be much higher than it was this year

61%
We expect the number of business trips taken by employees will be higher than it was this year

Q. Which of the following best describes your expectations for next year (2023) for your company’s business travel?
Note: Question only displayed to travel managers/procurement professionals (n=272)
Regardless of Region, Travel Managers Expect More Trips in 2023

What Do Travel Managers Expect for Next Year (2023)?

- We expect the number of business trips taken by employees will be lower/Much lower than it was this year: 2% (North America), 19% (Europe), 11% (Latin America)
- We expect the number of business trips taken by employees will be similar as it was this year: 5% (North America), 20% (Europe), 1% (Latin America)
- We expect the number of business trips taken by employees will be higher/Much higher than it was this year: 78% (North America), 73% (Europe), 89% (Latin America)
- Not sure: 0%

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

Note: Question only displayed to travel managers/procurement professionals
*indicates small sample size for North America-based travel managers (n<30)

Around the world, travel managers expect their company will engage in more business travel next year.
Travel Managers Are Optimistic About Internal *and* External Business Travel

Travel managers are optimistic about internal *and* external business travel. Two-thirds (66%) expect their company will engage in more internal business travel next year. A similar number (67%) expect their company will engage in more external travel.

**When it comes to internal business travel at their company, what do travel managers expect next year?**

- 66%: There will likely be more internal travel in 2023 compared to 2022
- 25%: There will likely be about the same amount of internal travel in 2023 compared to 2022
- 7%: There will likely be less non-internal travel in 2023 compared to 2022
- 5%: Not sure

**Q** What do you anticipate the volume of internal business travel such as travel to meet with colleagues or work at other company offices will be at your company in 2023 compared to 2022? *Note: Question only displayed to managers/procurement professionals (n=274).*

**When it comes to external business travel at their company, what do travel managers expect next year?**

- 67%: There will likely be more non-internal travel in 2023 compared to 2022
- 23%: There will likely be about the same amount of non-internal travel in 2023 compared to 2022
- 7%: There will likely be less non-internal travel in 2023 compared to 2022
- 3%: Not sure

**Q** What do you anticipate the volume of non-internal business travel such as travel to meet with colleagues or work at other company offices will be at your company in 2023 compared to 2022? *Note: Question only displayed to managers/procurement professionals (n=273).*
Travel Suppliers Are Also Optimistic About 2023

A growing number of economists and business experts are worried about a possible recession next year. However, most travel suppliers expect continued recovery of business travel. More than four in five (85%) expect the number of bookings by corporate clients will be higher next year than it was this year. Four in five (80%) expect spending by corporate clients will be higher next year than it was this year.

Q. Which of the following best describes your expectations for next year (2023)?
Note: Question only displayed to respondents who work for airlines, hotel properties or chains, ground transportation companies, or TMCs (n=183).

*We expect the number of bookings by corporate clients will be higher/much higher than it was this year*
85%

*We expect the number of bookings by corporate clients will be similar as it was this year*
14%

*We expect the number of bookings by corporate clients will be lower/much lower than it was this year*
1%

*Not sure*

Q. Which of the following best describes your expectations for next year (2023)?
Note: Question only displayed to respondents who work for airlines, hotel properties or chains, ground transportation companies, or TMCs (n=181).

*We expect business travel spending by corporate clients will be higher/much higher than it was this year*
80%

*We expect business travel spending by corporate clients will be similar as it was this year*
15%

*We expect business travel spending by corporate clients will be lower/much lower than it was this year*
5%

*Not sure*
Despite Economic Concerns, Most Travel Programs Do Not Currently Plan to Limit Business Travel

Looking ahead to 2023, which best describes your likely approach?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>We are already implementing a plan to limit business travel because of economic concerns</td>
</tr>
<tr>
<td>18%</td>
<td>We are considering limiting business travel because of economic concerns but have not made any decision yet</td>
</tr>
<tr>
<td>45%</td>
<td>We are taking a wait-and-see approach but are not seriously considering limiting business travel because of economic concerns</td>
</tr>
<tr>
<td>30%</td>
<td>We are unlikely to limit business travel because of economic concerns</td>
</tr>
</tbody>
</table>

Q Looking ahead to 2023, which of the following best describes your likely approach?  
Note: Question only displayed to travel managers/procurement professionals (n=269).
As Travel Suppliers Look Ahead to Next Year, Economic Concerns Trump COVID Concerns

For more than two years, COVID-19 loomed over business travel. Finally, the industry appears to be turning a corner. Looking ahead to next year, COVID-19 is not the industry's chief concern. Four in five travel suppliers (80%) say economic conditions are most likely to limit business travel next year. Only 4% say COVID-19 is most likely to limit business travel next year.

Q. Thinking ahead to next year, which of the following do you think is more likely to reduce or limit the growth of business travel bookings with your company? Note: Question only displayed to travel suppliers/TMC employees (n=237).
Only 12% of Respondents Say Their Company Has a Full-Time In-Office Policy

Which of the following best describes your company’s current in-office/work-from-home (WFH) policy?

- Full-time in-office: Most employees are required or expected to report to the office most or all days
- Hybrid: Most employees are required or expected to work from the office some days – but are permitted to work from home other days
- Full-time remote: Employees are allowed or expected to work from home most or all days

Q  Which of the following best describes your company’s current in-office/work-from-home (WFH) policy? (n=526)
Many Travel Managers Think Flexibility to Work Remote Won’t Impact Business Travel

With remote work on the rise, the business travel industry has speculated about how this will reshape business travel. For instance, companies might hold more internal meetings and gatherings to build relationships and facilitate collaboration between colleagues. In other cases, remote work might actually lead to less travel. For instance, an employee who was formerly based in a large metropolitan area was able to easily travel to meet with clients. If she moves to a remote area, it might be more difficult to travel. It is also possible that changing largely will not impact business travel at all. For respondents whose companies allow remote or hybrid work, this seems to be the prevailing view. Of these respondents, almost three-quarters (72%) expect flexibility to from home will not impact the number of business trips taken by employees.

Q: You mentioned your company has a hybrid or remote work policy. Do you think this will result in more or less business travel? Note: Question only displayed to respondents who indicated their company has a hybrid or full-time remote work policy (n=460)

- 14% Flexibility to work from home will not impact the number of business trips taken by our employees
- 14% Flexibility to work from home will result in employees taking more business trips
- 72% Flexibility to work from home will result in employees taking fewer business trips
Travel Managers Have Limited Involvement With Planning Internal Team-Building Events or Retreats

Do travel managers have more responsibility for planning team-building events/internal retreats than they did pre-pandemic?

- I have more responsibility for arranging these types of meetings: 17%
- I have about the same level of responsibility for arranging these types of meetings: 42%
- I have less responsibility for arranging these type of meetings: 27%
- I never had/don’t have the responsibility to arrange these type of meetings: 10%
- Don’t know: 4%

Q In 2022, as a travel manager has your responsibility for arranging team building events, offsite meetings and/or executive retreats changed versus 2019?  
Note: Question only displayed to travel managers/procurement professionals (n=269)

Remote work could drive companies to hold more internal summits or retreats. If staff are spread around a country or the world, employers might hold regular internal meetings where employees meet in person to facilitate collaboration and company culture. However, travel managers largely do not have more responsibility for arranging these meetings than they did pre-pandemic.
Only Some Companies Reimburse Remote Working Expenses

Only some companies reimburse remote working expenses. Of the respondents who say their company has a remote or hybrid work policy, one-quarter (27%) say it reimburses employees for any costs or expenses incurred while they are working remotely. Two in five (42%) say their company does not reimburse these expenses while one-quarter (25%) say it depends on manager discretion.

Q  Does your company reimburse employees for any costs or expenses incurred while they are working remotely?  
Note: Question only displayed to respondents who indicated their company has a hybrid or full-time remote work policy (n=459)
Of the respondents who say their company has a hybrid or fully remote work policy…

44% say employees are allowed to work remote for an extended period outside the city, state or province where they are typically based including 22% that even allow employees to work for an extended period outside the country where they are typically based.

45% say employees are expected to work from in the city, state, province or country where they are typically based.

11% say “other” (5%) or “not sure” (6%).

Q: You mentioned your company allows hybrid or full-time remote work options. Thinking about your company, which of the following best describes its policy? Note: Question only displayed to respondents who indicated their company has a hybrid or full-time remote work policy (n=461)
2 in 5 Travel Programs See an Increase in “Bleisure” Interest

A decent number of travel managers (41%) say they have seen an increase in employees asking to take “bleisure” trips where they add a vacation component to a work trip. This could be driven by remote or hybrid work policies that might allow employees to take bleisure trips without using vacation time.

Have travel managers seen an increase in employees asking for blended travel/bleisure considerations?

- Yes: 41%
- No: 42%
- Don’t know: 17%

Q  Have you seen an increase in employees asking for blended travel/bleisure considerations?
Note: Results filtered to only show travel managers/procurement professionals (n=264)
Most Companies Don’t Help Pay for the Leisure Component of “Bleisure” Trips

A large majority of respondents (88%) say their company does not reimburse costs associated with the leisure component of “bleisure” trips. One in 10 travel managers (10%) say their company does not even automatically reimburse the cost of transportation if an employee extends a work trip for leisure.

Q Does your company reimburse employees for anything beyond the business trip’s initial inbound and outbound transportation costs when an employee extends a trip for leisure (air/train, hotel, car, meals), also known as blended or bleisure travel? (n=505)