



**GBTA** Global Business  
Travel Association

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# GBTA Business Travel Recovery Poll Results

October 6, 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 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





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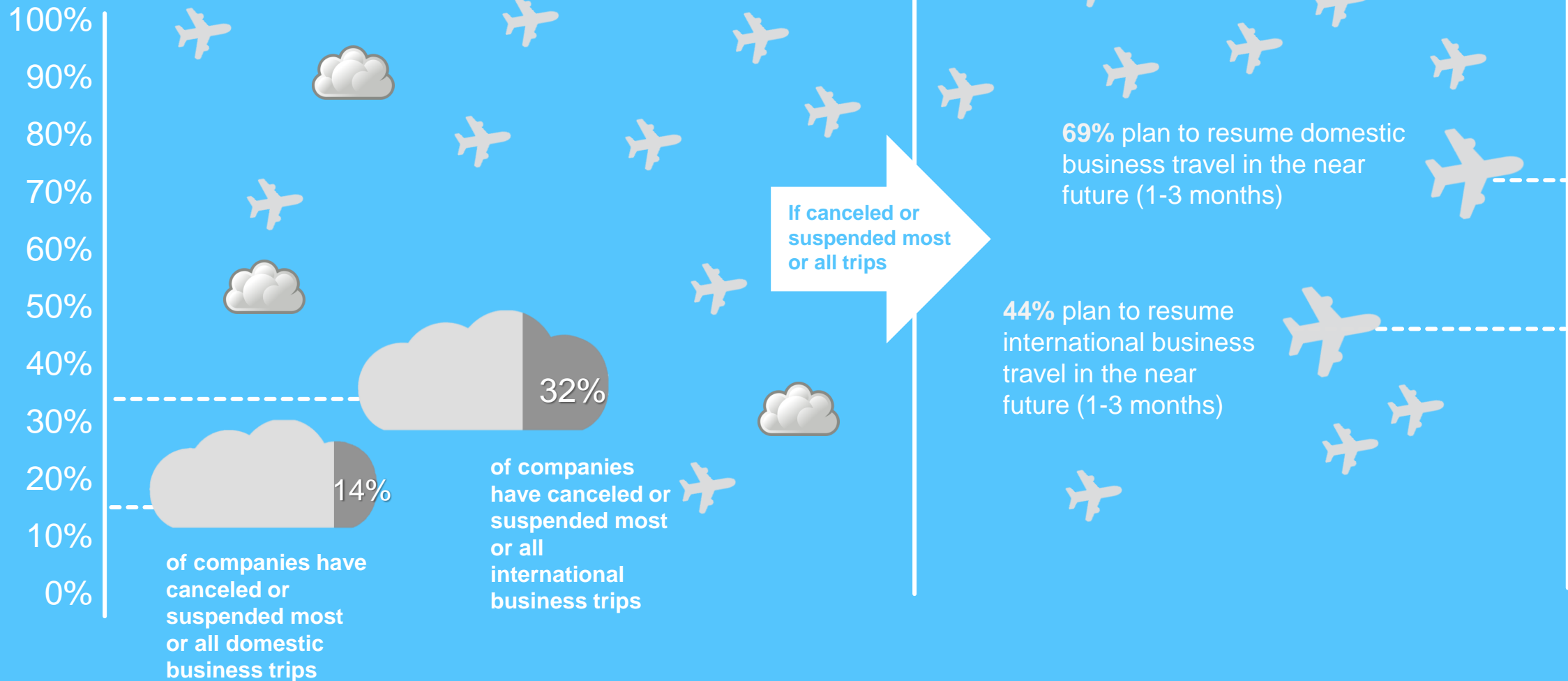
# The State of Business Travel



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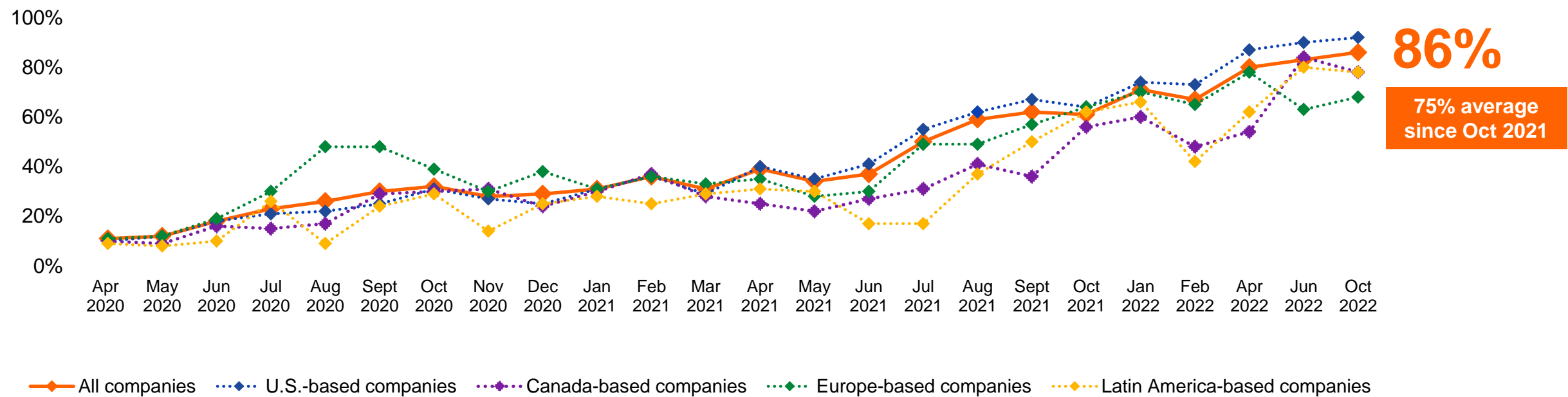
October 2022

Open skies for  
business travel



# The State of Domestic Business Travel

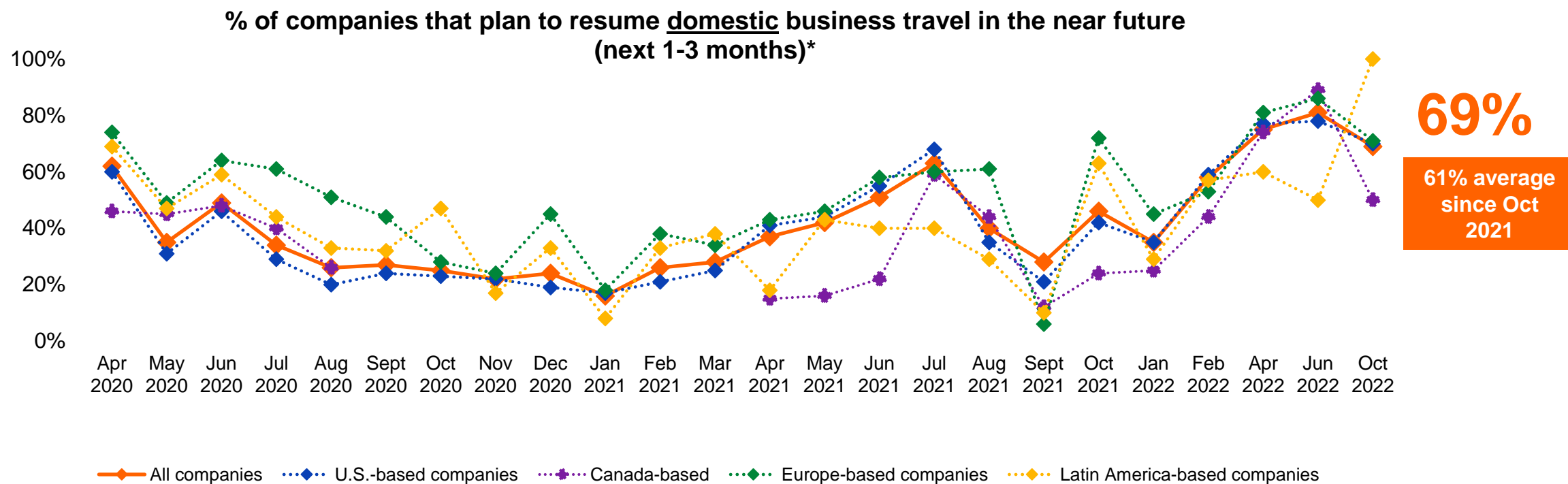
% of companies allowing some or more domestic business travel within their country



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



# The State of Domestic Business Travel (Cont.)

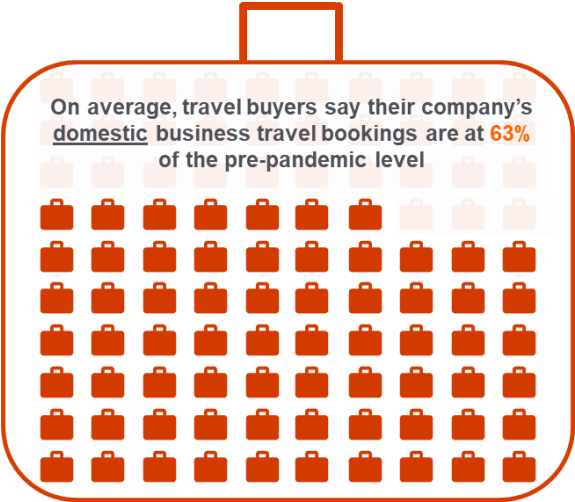


\*Figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country

Note: Small sample size for Canada, Europe, and Latin America-based respondents (n<30)

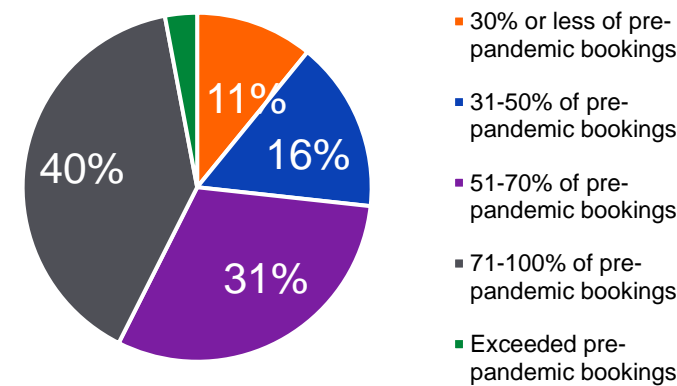
# The State of Domestic Business Travel (Cont.)

## Domestic Business Travel Leads the Recovery



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

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



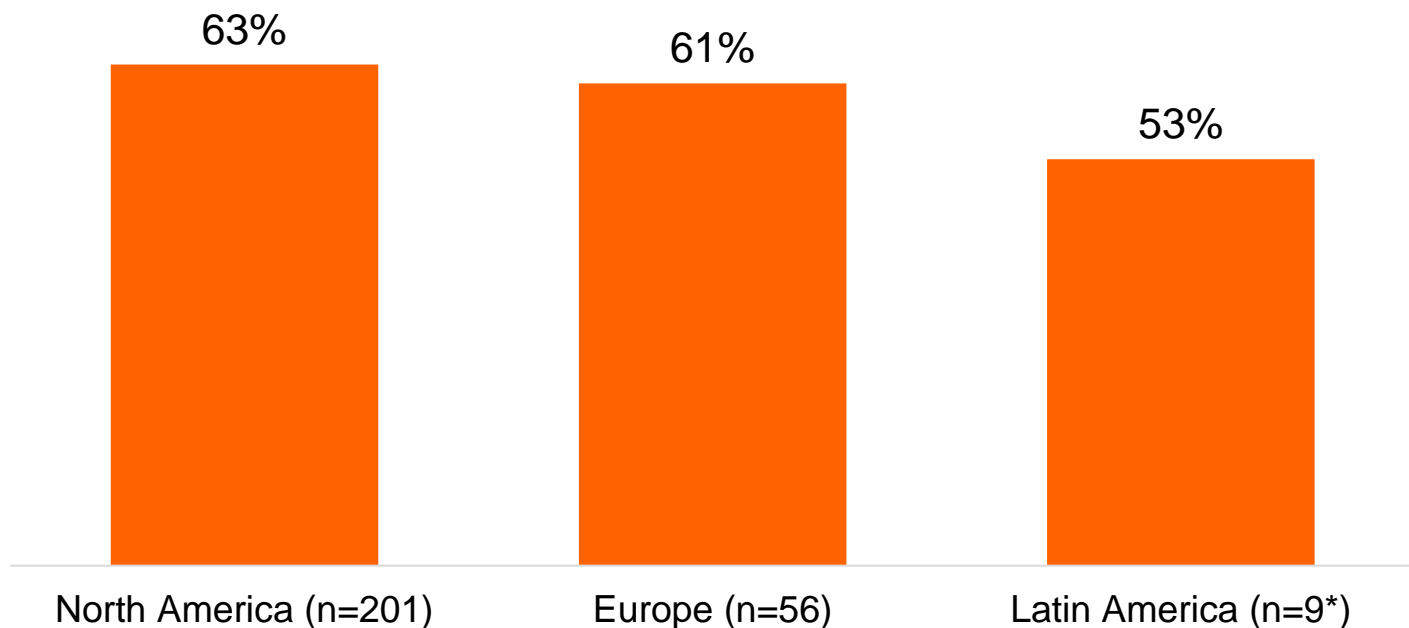
On average, travel managers say their company's domestic business travel bookings have recovered to 63% of the pre-pandemic level. Only one-quarter (27%) say their domestic bookings are below 50% of the pre-pandemic level. Two in five (43%) say their domestic bookings have exceeded 70% of the pre-pandemic 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).

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

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

*estimated averages by region*



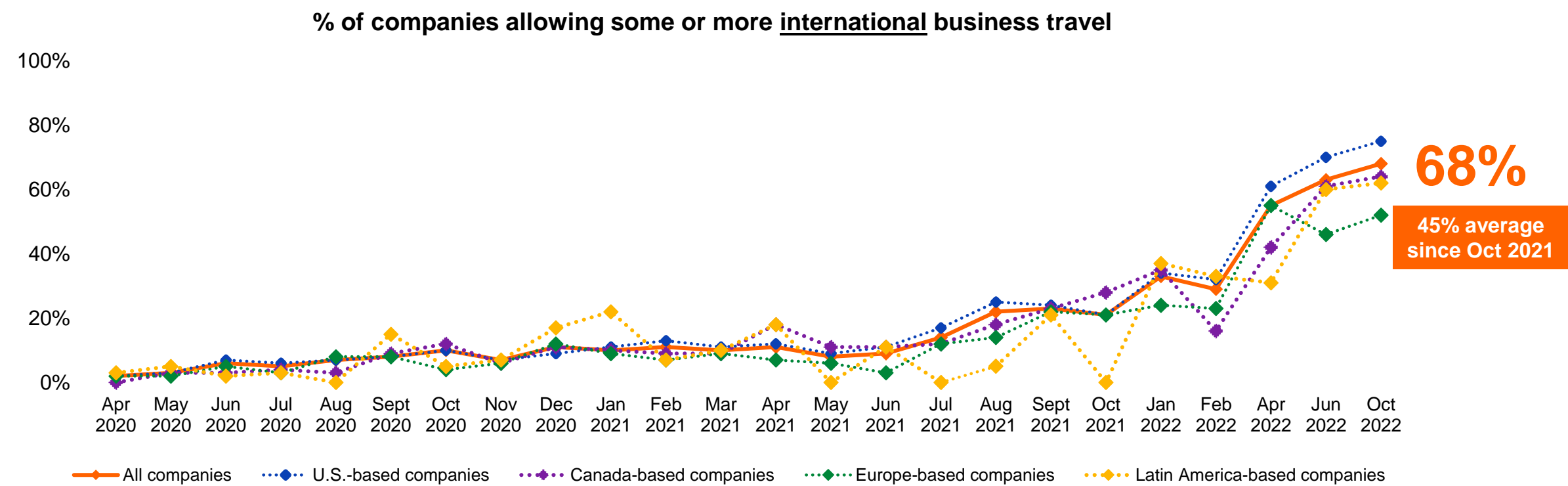
Q. Thinking about your company's current domestic business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine.** Note: Question only displayed to travel buyers/procurement professionals.

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

**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%).

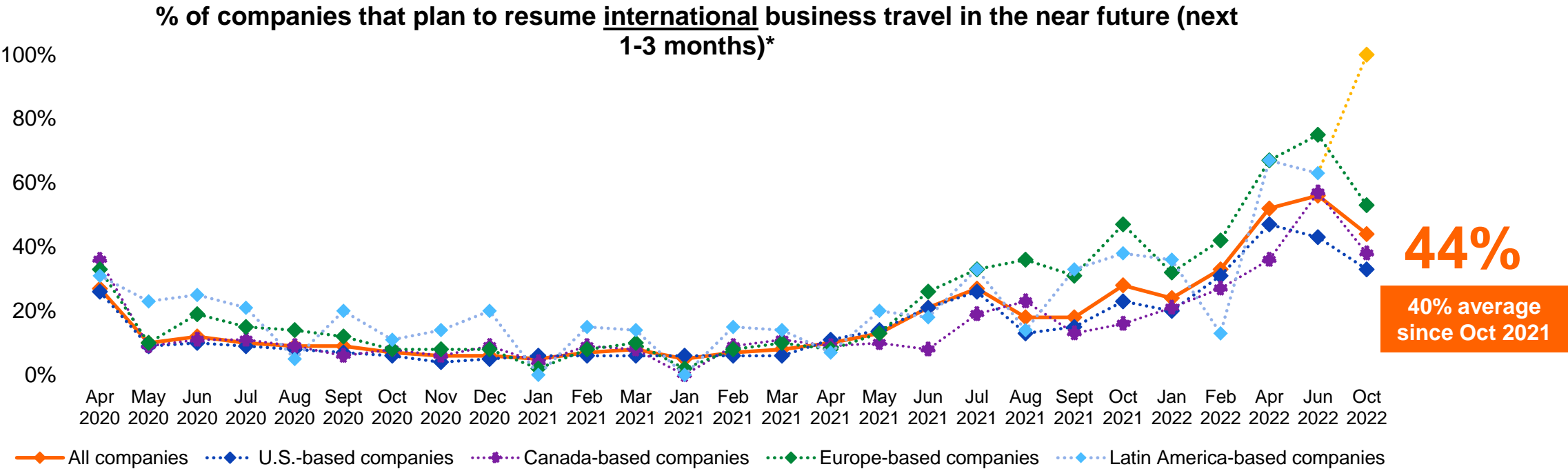


# The State of International Business Travel



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.)



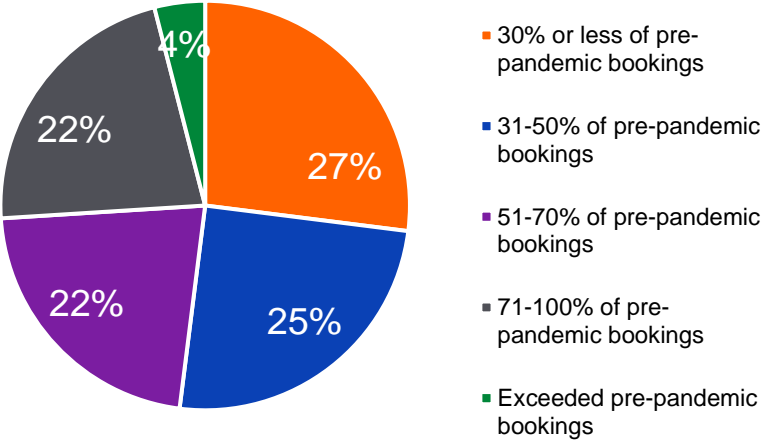
\*Figures are among those that indicated their company has canceled or suspended most or all international business trips  
Note: Small sample size for Canada and Latin America-based respondents in recent polls (n<30)

# The State of International Business Travel (Cont.)

## International Business Closes the Gap



Thinking About International Bookings, Are Travel Programs Currently at...?



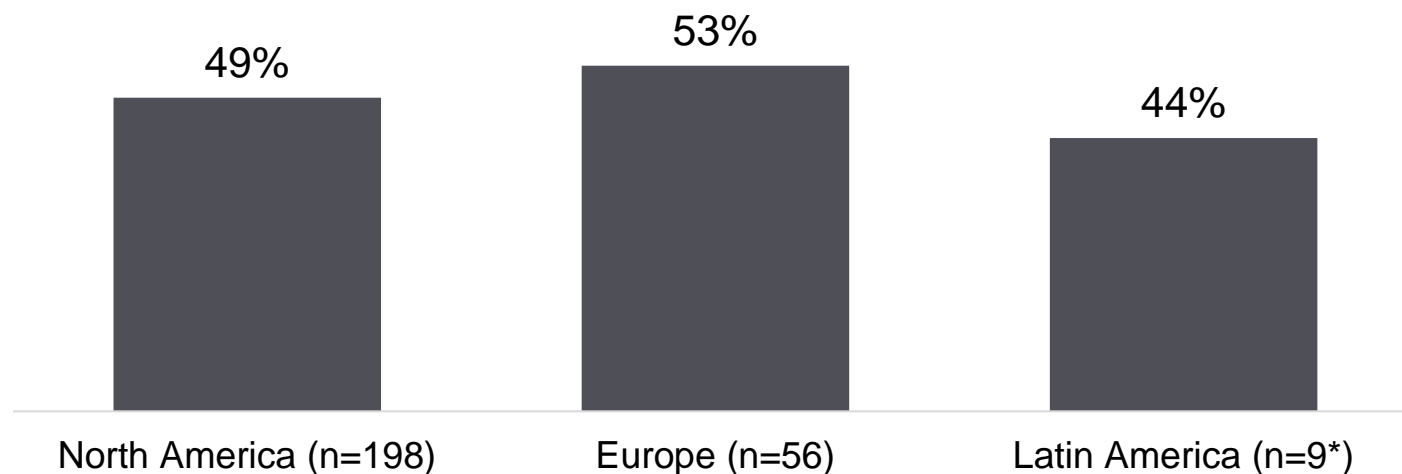
During the recovery, international business travel has significantly lagged domestic travel. Recently, it has closed the gap. On average, travel buyers say their company's international business travel bookings have recovered to 50% of the pre-pandemic level. More than one-quarter (26%) say their international 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.

# 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 buyers/procurement professionals.

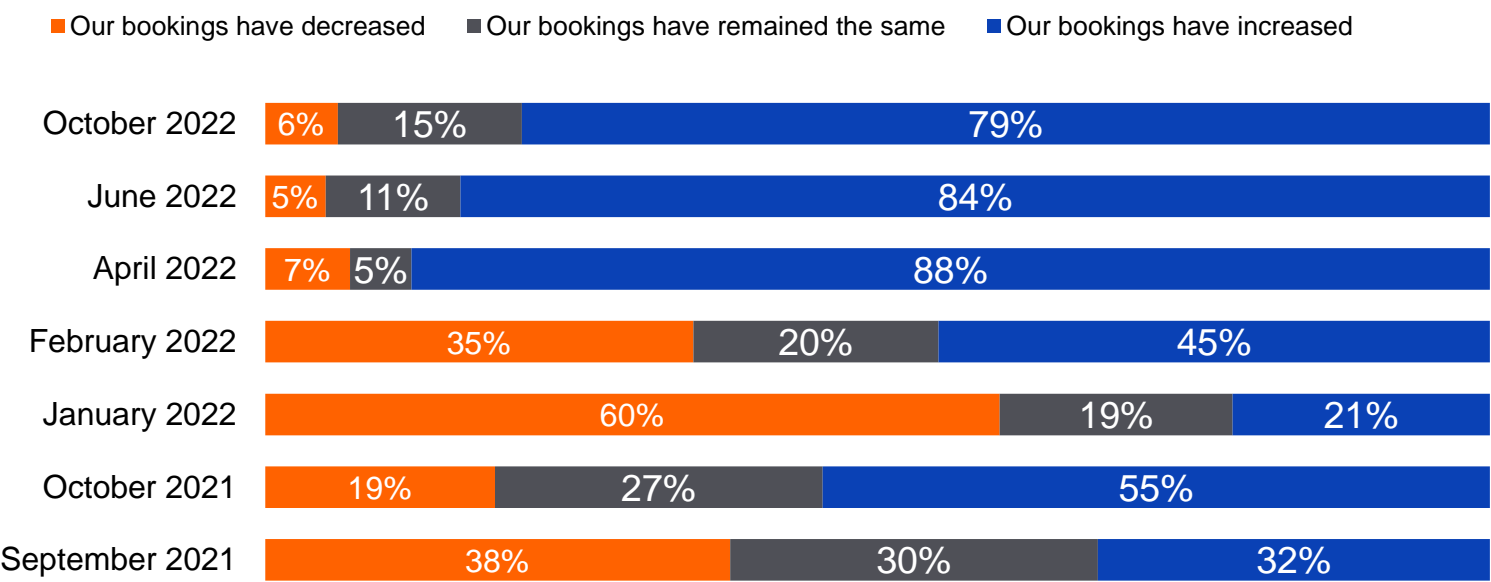
\*indicates small sample size for Latin America (n<30)

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.

# Supplier Bookings Continue to Climb



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



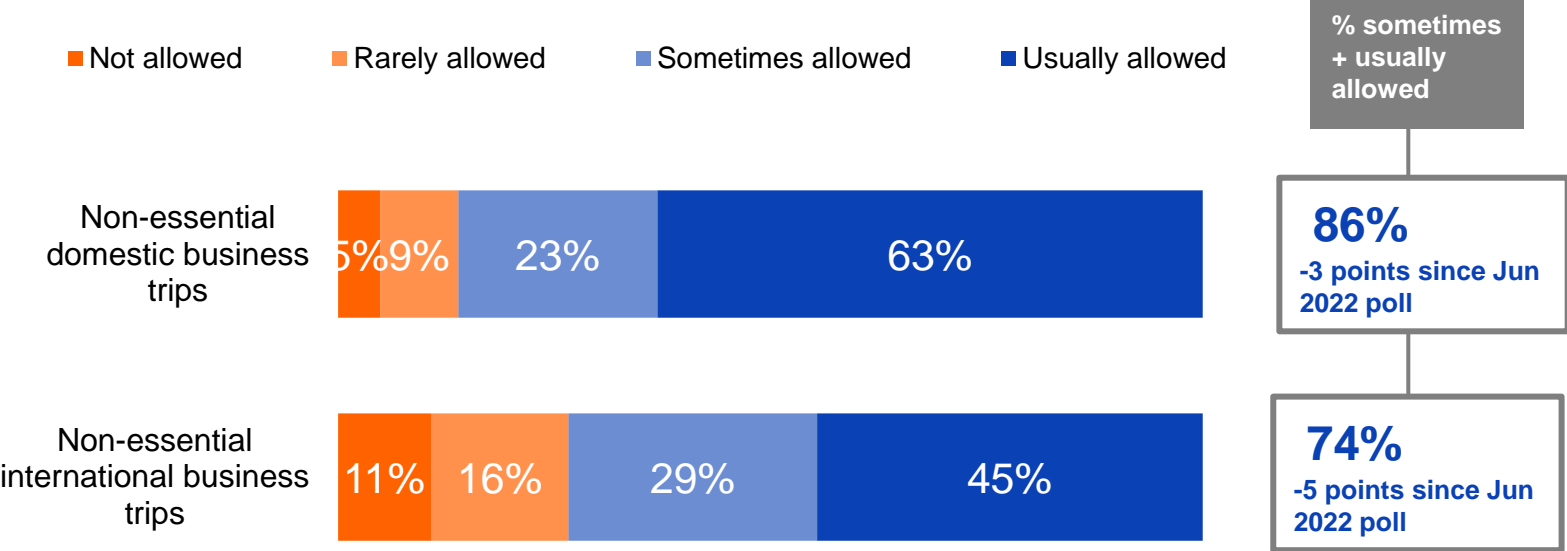
While business travel largely returned in the first half of the year, there is still room for continued recovery. Four in five travel suppliers (79%) say their bookings from corporate customers increased in the past month.

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)

# Companies Widely Allow Non-Essential Business Travel

Company's current position on employees traveling for business



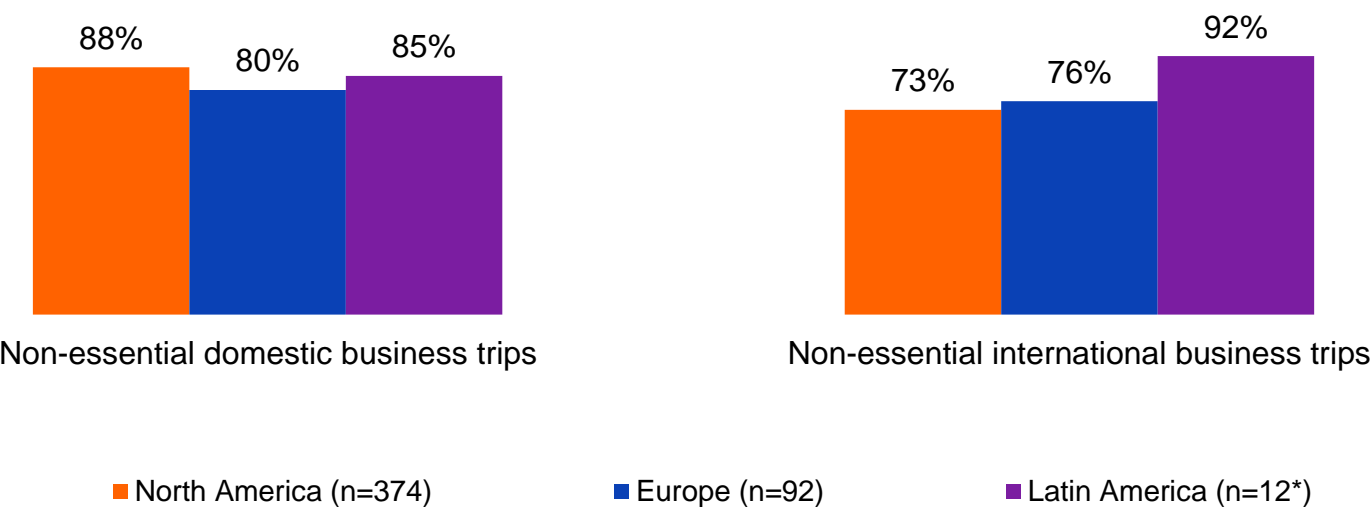
Almost 9 in 10 respondents (86%) say their company at least sometimes allows non-essential **domestic** business travel. Three-quarters (74%) say their company at least sometimes allows non-essential **international** business travel.

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

Company’s current position on employees traveling for business  
*% “usually” or “sometimes” allowed by region*



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)*

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.

# Few Companies Cancel or Suspend Business Trips



32%

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



14%

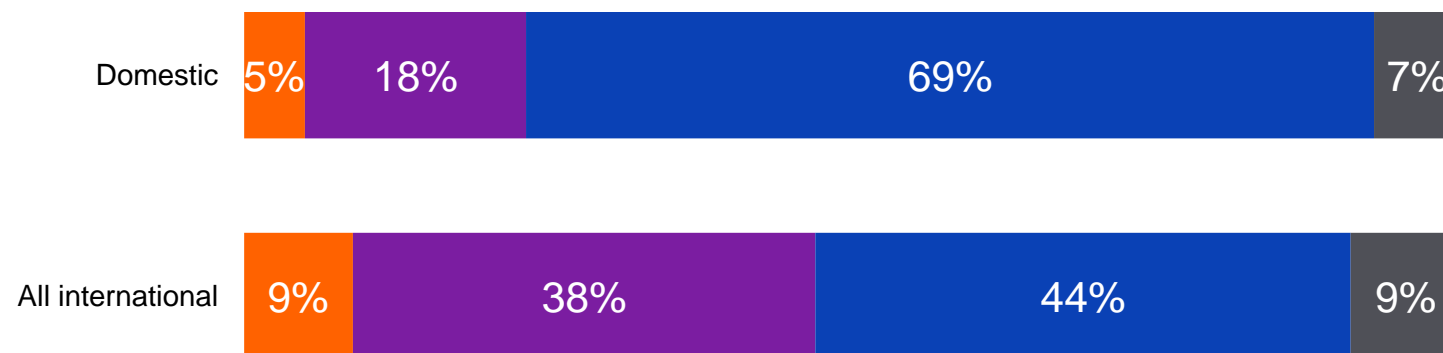
of companies have canceled or suspended **most** (10%) or **all** (4%) domestic travel within their own country

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)



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# Key Highlights



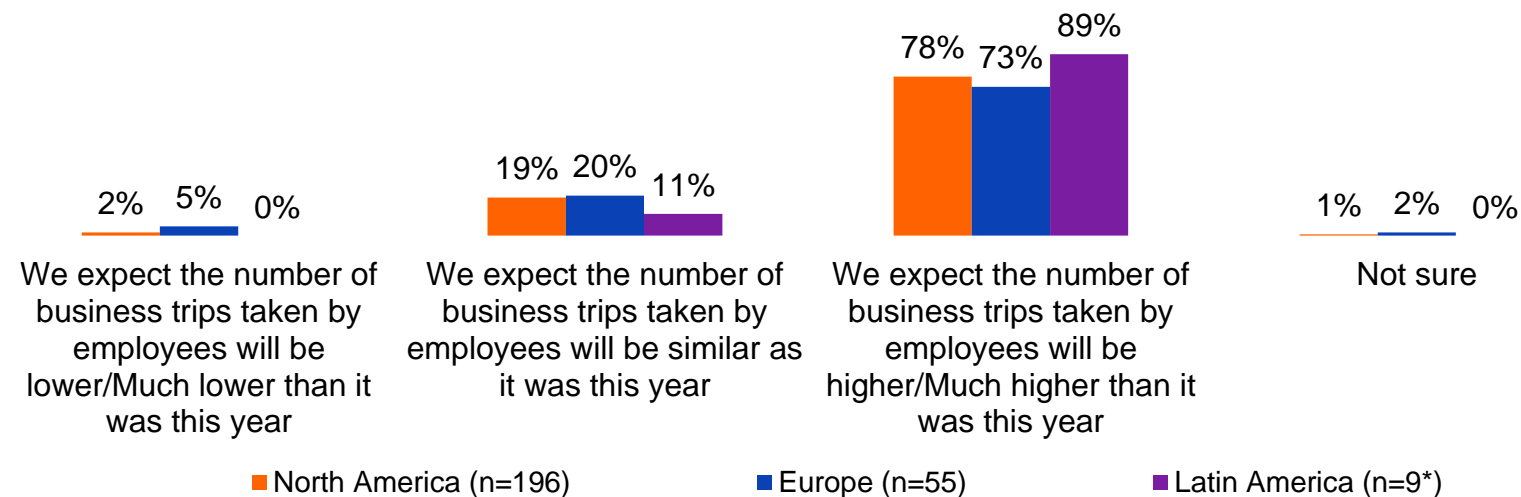
# Three-Quarters of Travel Managers (78%) Expect Their Company Will Take More Business Trips Next Year

## What Do Travel Managers Expect for Next Year?



# Regardless of Region, Travel Managers Expect More Trips in 2023

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



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

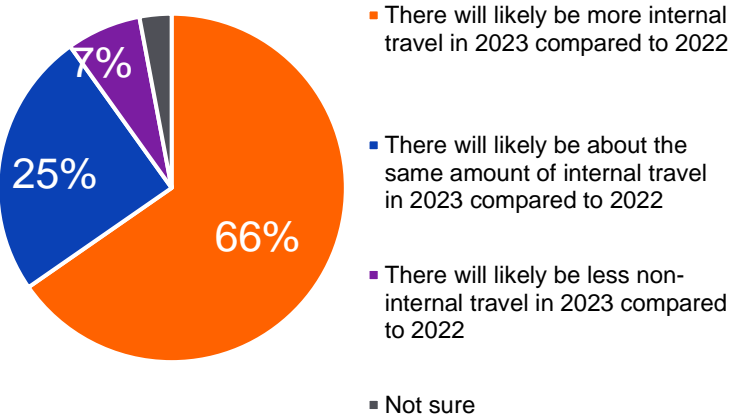
**Note: Question only displayed to travel managers/procurement professionals**

**\*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.

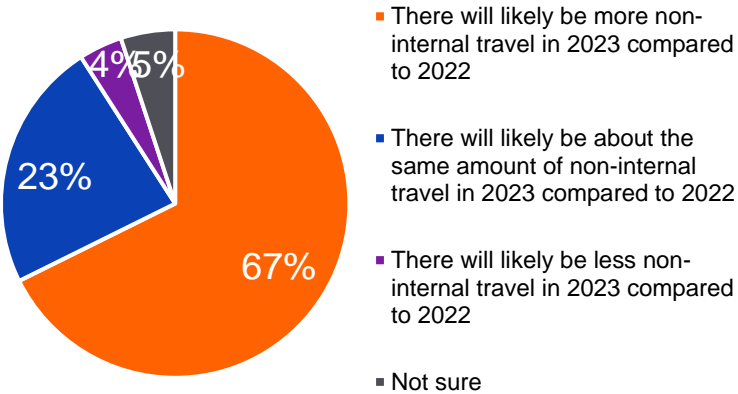
# Travel Managers Are Optimistic About Internal *and* External Business Travel

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



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?



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).**

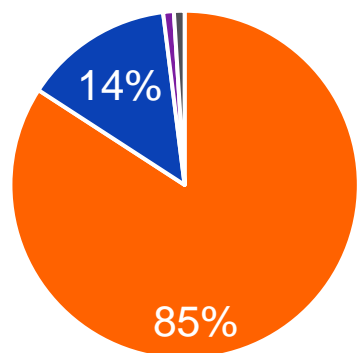
Travel managers are optimistic about internal *and* external business travel. Two-thirds (66%) expect their company will engage in more internal business travel next year. A similar number (67%) expect their company will engage in more external travel.



# Travel Suppliers Are Also Optimistic About 2023



What do travel suppliers expect for corporate bookings next year?



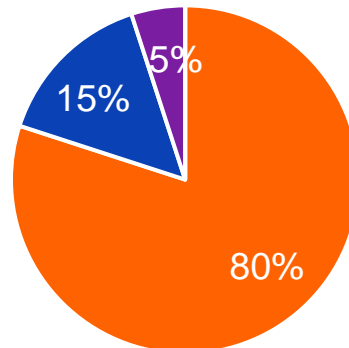
- We expect the number of bookings by corporate clients will be higher/much higher than it was this year
- We expect the number of bookings by corporate clients will be similar as it was this year
- We expect the number of bookings by corporate clients will be lower/much lower than it was this year
- 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=183).



What do travel suppliers expect for corporate spending next year?



- We expect business travel spending by corporate clients will be higher/much higher than it was this year
- We expect business travel spending by corporate clients will be similar as it was this year
- We expect business travel spending by corporate clients will be lower/much lower than it was this year
- 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).

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.

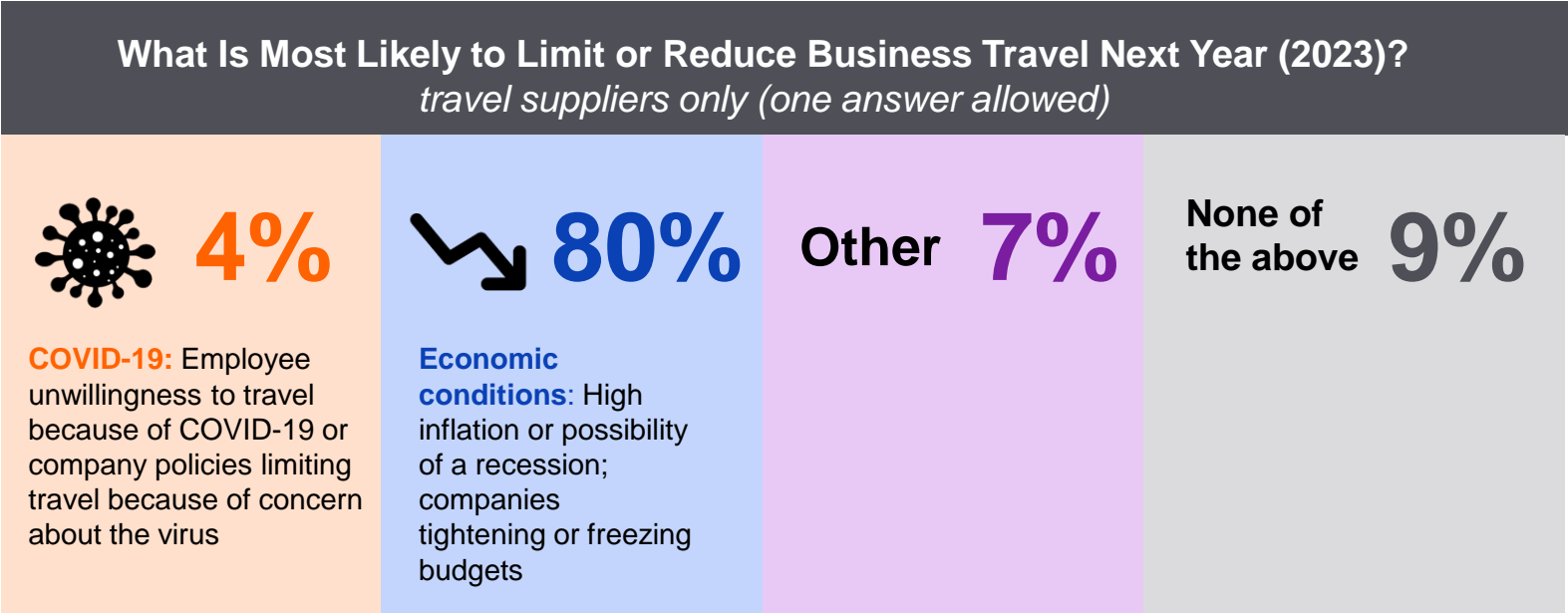
# Despite Economic Concerns, Most Travel Programs Do Not Currently Plan to Limit Business Travel



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).

Despite economic concerns, most travel programs do not plan to preemptively limit business travel next year. Only 8% of travel managers say their company is already implementing a plan to limit business travel because of economic concerns. An additional one in five (18%) are considering limiting business travel because of economic concerns. However, most are taking a wait - and-see approach (45%) or are unlikely to limit business travel (30%).

# As Travel Suppliers Look Ahead to Next Year, Economic Concerns Trump COVID Concerns

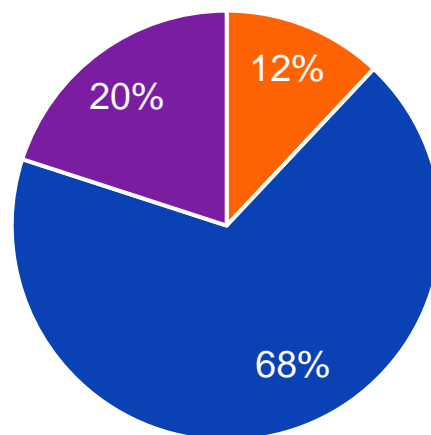


Q. Thinking ahead to next year, which of the following do you think is more likely to reduce or limit the growth of business travel bookings with your company? **Note: Question only displayed to travel suppliers/TMC employees (n=237).**

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.

# 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?



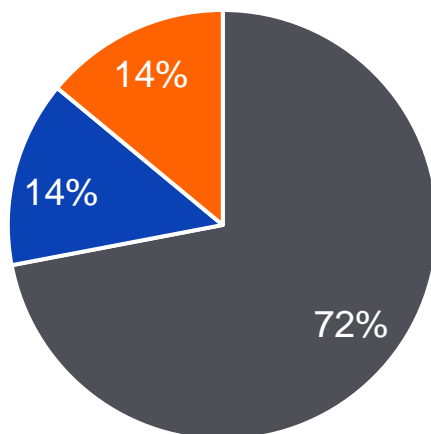
- Full-time in-office: Most employees are required or expected to report to the office most or all days
- Hybrid: Most employees are required or expected to work from the office some days – but are permitted to work from home other days
- Full-time remote: Employees are allowed or expected to work from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

**Most companies embrace hybrid or remote work.** Only 12% of respondents say their company expects employees to report to the office most or all days. While one in five respondents (20%) say their company has embraced full-time remote work, the most common approach—adopted by two-thirds of respondent companies—is a hybrid approach where employees are expected to work from the office some days but are permitted to work from home other 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

Will flexibility to work remote impact the amount of business travel?



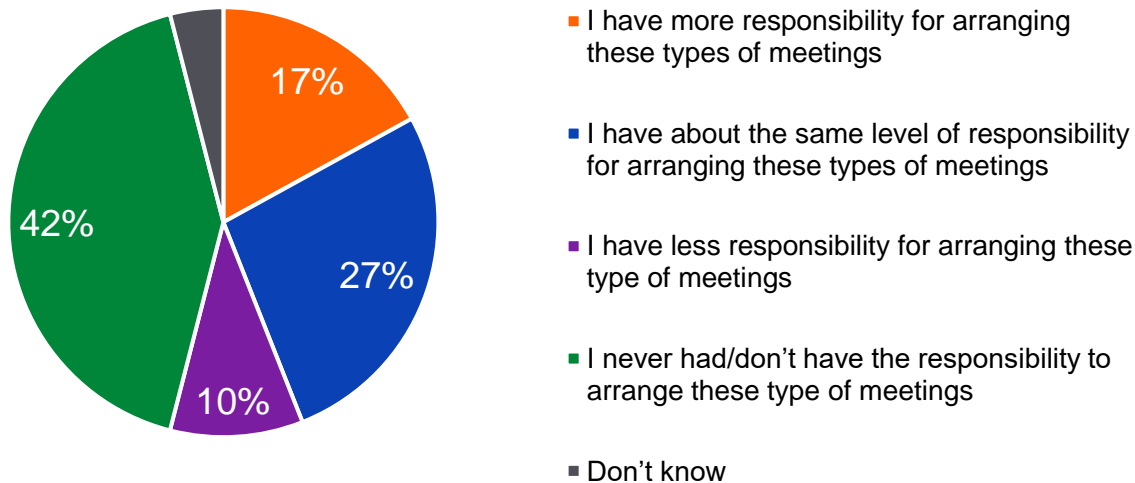
- Flexibility to work from home will not impact the number of business trips taken by our employees
- Flexibility to work from home will result in employees taking more business trips
- Flexibility to work from home will result in employees taking fewer business trips

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)**

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.

# 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?



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)

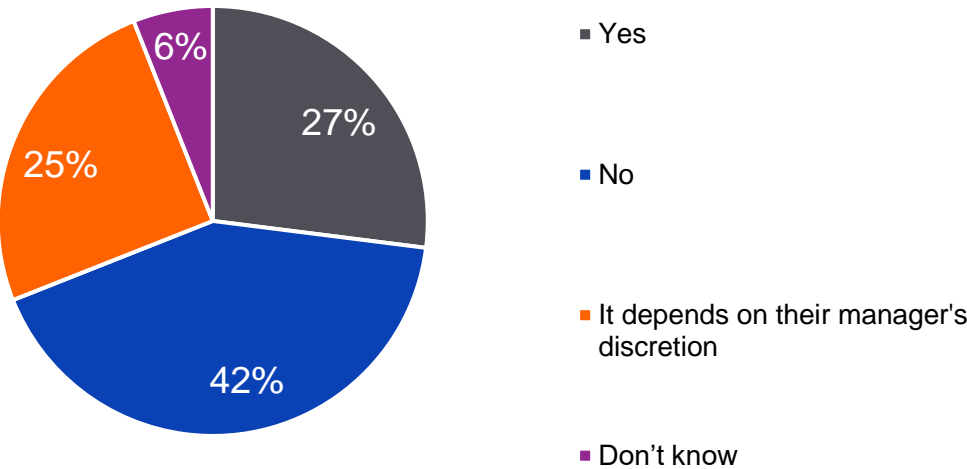
**Remote work could drive companies to hold more internal summits or retreats.**

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

Do 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%

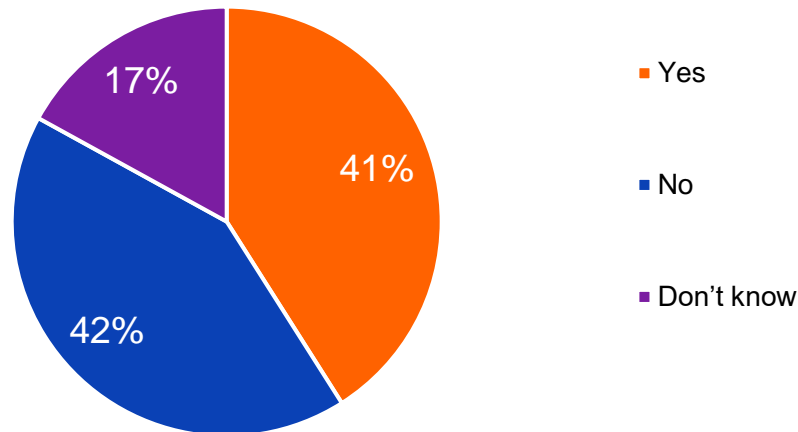
say “other” (5%) or “not sure” (6%)



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

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



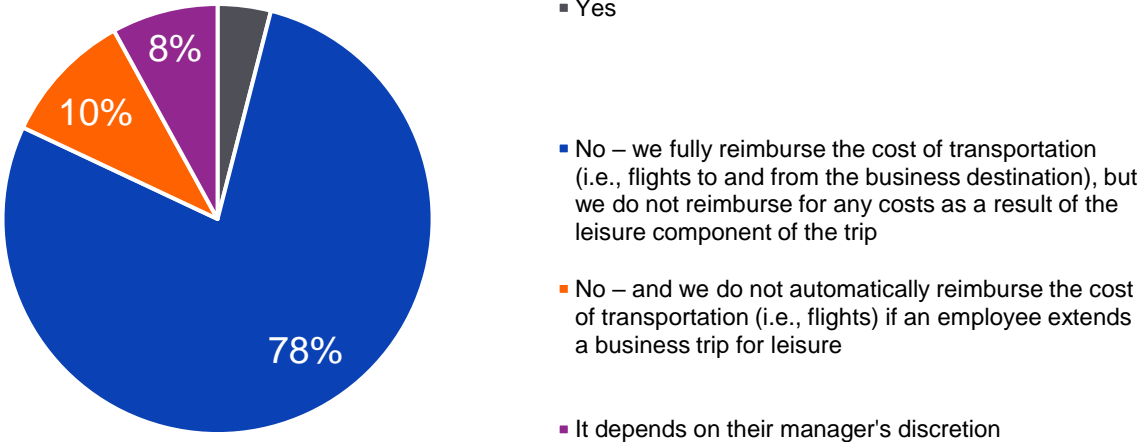
Q Have you seen an increase in employees asking for blended travel/bleisure considerations?

Note: Results filtered to only show travel managers/procurement professionals (n=264)

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.

# Most Companies Don't Help Pay for the Leisure Component of “Bleisure” Trips

Do companies cover expenses associated with the leisure component of “bleisure” trips (beyond transportation?)



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)

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.