Business Travel Recovery Poll Results
April 21, 2022
Methodology

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

• Fielding took place from April 4 through April 12, 2022

• An email invitation was sent to 10,526 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, 520 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 Global Business Travel
The State of Global Business Travel
April 2022

- 0% of companies have canceled or suspended most or all domestic business trips (vs. Feb 2022 poll: 33%)
- 20% of companies have canceled or suspended most or all international business trips (vs. Feb 2022 poll: 71%)
- 45% of companies have canceled or suspended most or all trips

If canceled or suspended most or all trips:
- 75% plan to resume domestic business travel in the next 1-3 months (vs. Feb 2022 poll: 58%)
- 52% plan to resume international business travel in the next 1-3 months (vs. Feb 2022 poll: 33%)

Clouds part – and business travel begins to take off again.
The State of Domestic Business Travel

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

Note: The GBTA Coronavirus Poll wasn’t conducted in November and December 2021 or March 2022
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.)

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

- **All companies**: 75%
- **U.S.-based companies**: +17 percentage points from last poll
- **Canada-based**: 47% average over last 6 polls
- **Europe-based companies**
- **Latin America-based companies**

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

*Note: The GBTA Coronavirus Poll wasn’t conducted in November and December 2021 or March 2022

Note: Small sample size for Latin America-based respondents in recent polls (n<30)
The State of International Business Travel

% of companies allowing some or more international business travel

Note: The GBTA Coronavirus Poll wasn’t conducted in November and December 2021 or March 2022
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 domestic business trips within their country
Note: The GBTA Coronavirus Poll wasn’t conducted in November and December 2021 or March 2022
*Figures are among those that indicated their company has canceled or suspended most or all international business trips
Note: Small sample size for Latin America-based respondents in recent polls (n<30)
## Corporate Travel Bookings Soar

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

<table>
<thead>
<tr>
<th></th>
<th>Our bookings have decreased</th>
<th>Our bookings have remained the same</th>
<th>Our bookings have increased</th>
</tr>
</thead>
<tbody>
<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>
<tr>
<td>August 2021</td>
<td>31%</td>
<td>46%</td>
<td>24%</td>
</tr>
<tr>
<td>July 2021</td>
<td>3%</td>
<td>27%</td>
<td>70%</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) Note: Before September 2021, this question asked about how bookings changed in the past week.
More Than 9 in 10 Travel Managers Say Their Company’s Employees Are Willing to Travel for Work

**Do Travel Managers think their company’s employees are willing to travel?**

<table>
<thead>
<tr>
<th></th>
<th>Not willing at all</th>
<th>Not willing</th>
<th>Neither willing nor unwilling</th>
<th>Somewhat willing</th>
<th>Very willing</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 2022</td>
<td>5%</td>
<td>50%</td>
<td>43%</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>February 2022</td>
<td>5%</td>
<td>9%</td>
<td>60%</td>
<td>22%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>January 2022</td>
<td>10%</td>
<td>17%</td>
<td>49%</td>
<td>15%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>October 2021</td>
<td>2%</td>
<td>13%</td>
<td>48%</td>
<td>30%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>September 2021</td>
<td>5%</td>
<td>19%</td>
<td>57%</td>
<td>12%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>August 2021</td>
<td>8%</td>
<td>11%</td>
<td>56%</td>
<td>16%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>July 2021</td>
<td>3%</td>
<td>12%</td>
<td>53%</td>
<td>24%</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

Q. Thinking about your company’s employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=191-448)
Bookings Continue to Return to Pre-Pandemic Levels

Travel Buyers

On average, travel buyers say their company's business travel bookings are at 56% of the pre-pandemic level, up 22 points from last poll (Feb. 2022).

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

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

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 bookings from business travel, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at…? Your best estimate is fine.

Note: Only displayed to travel supplier/TMC professionals (n=189)

Note: Respondents were given ranges in 10-point intervals; these were combined into groups to make interpretation easier.

On average, travel suppliers say their company’s business travel bookings are at 44% of the pre-pandemic level, up 2 points from last poll (Feb. 2022).

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. Which of the following best describes your company’s current position on employees traveling for business? (n=689-737)

Note: Some respondents indicated “Not applicable/Not sure.” These responses were excluded from calculations.

**Company’s current position on employees traveling for business**

- **Non-essential domestic business trips**
  - Not allowed: 5%
  - Rarely allowed: 8%
  - Sometimes allowed: 21%
  - Usually allowed: 65%

- **Non-essential international business trips**
  - Not allowed: 10%
  - Rarely allowed: 16%
  - Sometimes allowed: 29%
  - Usually allowed: 45%

**86%**
+13 points from last poll (Feb. 2022)

**74%**
+26 points from last poll (Feb. 2022)
Most Companies Allow Employee Travel Regardless of Region

Q. Which of the following best describes your company’s current position on employees traveling for business? (n=689-737)

*indicates small sample size in Latin America (n<30)
Key Highlights
Companies Have Made Changes to Their Travel Program During the Pandemic

What travel policy changes have companies made during the pandemic?

<table>
<thead>
<tr>
<th>Change</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer business trips overall</td>
<td>39%</td>
</tr>
<tr>
<td>Employees take fewer business trips, but there are more objectives</td>
<td>37%</td>
</tr>
<tr>
<td>and goals assigned to each trip</td>
<td></td>
</tr>
<tr>
<td>More trip approval requirements</td>
<td>24%</td>
</tr>
<tr>
<td>A company re-evaluation of how employees will travel for business</td>
<td>23%</td>
</tr>
<tr>
<td>(ex: safety considerations, types of transport, sustainable hotel</td>
<td></td>
</tr>
<tr>
<td>stays, etc.)</td>
<td></td>
</tr>
<tr>
<td>A company re-evaluation of why/who travels for business (ex: return</td>
<td>22%</td>
</tr>
<tr>
<td>to base travel,</td>
<td></td>
</tr>
<tr>
<td>An overall company reevaluation of what it defines as &quot;business</td>
<td>12%</td>
</tr>
<tr>
<td>travel&quot;</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>There has been no change</td>
<td>20%</td>
</tr>
</tbody>
</table>

Q. To what extent have business travel policies evolved or changed at your company due to the pandemic? Please select all that apply (n=456)
Companies Have Made Changes to Their Travel Program During the Pandemic (Cont.)

What travel policy changes have companies made during the pandemic?  
by region

- Fewer business trips overall: 50% North America, 38% Europe, 36% Latin America
- Employees take fewer business trips, but there are more objectives and goals assigned to each trip: 40% North America, 31% Europe, 31% Latin America
- More trip approval requirements: 24% North America, 24% Europe, 19% Latin America
- A company re-evaluation of how employees will travel for business (ex: safety considerations, types of transport, sustainable hotel stays, etc.): 25% North America, 22% Europe, 20% Latin America
- A company re-evaluation of why/who travels for business (ex: return to base travel, internal meetings, etc.): 38% North America, 25% Europe, 35% Latin America
- An overall company reevaluation of what it defines as "business travel": 12% North America, 11% Europe, 6% Latin America
- Other: 6% North America, 3% Europe, 6% Latin America
- There has been no change: 21% North America, 17% Europe, 13% Latin America

Q. To what extent have business travel policies evolved or changed at your company due to the pandemic?  Please select all that apply
Note: Small sample size for Latin America-based respondents in recent polls (n<30)
How Will Sustainability Transform Travel Programs?

<table>
<thead>
<tr>
<th>Will sustainability impact travel program in various ways?</th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer trips per employee</td>
<td>54%</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Length of trips may be longer with more meetings or destinations</td>
<td>43%</td>
<td>34%</td>
<td>23%</td>
</tr>
<tr>
<td>More rail or multi-modal options other than airplanes</td>
<td>34%</td>
<td>42%</td>
<td>24%</td>
</tr>
<tr>
<td>Using more public transport compared to individual cars</td>
<td>29%</td>
<td>47%</td>
<td>24%</td>
</tr>
<tr>
<td>Travelers are allowed to fly business class less frequently</td>
<td>19%</td>
<td>61%</td>
<td>19%</td>
</tr>
<tr>
<td>Encourage employees to blend a business trip with personal activities, e.g., extending over a weekend, at that destination to have less impact on airline emissions overall</td>
<td>15%</td>
<td>61%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Q. Thinking about your company, to what extent do you think sustainability considerations will have an impact on…?

Note: Question only displayed to travel managers/procurement professionals (n=188-190)
European Companies Appear More Likely to Reduce Business Travel

Will sustainability impact travel program in various ways? by region

- Fewer trips per employee: 47% in North America, 71% in Europe
- Length of trips may be longer with more meetings or destinations: 36% in North America, 59% in Europe
- More rail or multi-modal options other than airplanes: 23% in North America, 58% in Europe
- Using more public transport compared to individual cars: 21% in North America, 41% in Europe
- Travelers are allowed to fly business class less frequently: 17% in North America, 19% in Europe
- Encourage employees to blend a business trip with personal activities: 11% in North America, 21% in Europe

Q. Thinking about your company, to what extent do you think sustainability considerations will have an impact on…?

Note: Question only displayed to travel managers/procurement professionals
More Than Half of Respondents Don’t Support Government Mask Mandates on Commercial Flights

How do you feel about the continuation of mask mandates on commercial flights?

- Governments should continue to require all passengers wear masks on commercial flights
- Governments should allow airlines to decide if passengers are required to wear masks
- Governments should prohibit mask mandates (i.e., allow passengers to fly on any airline without masks)
- Other

Q. How do you feel about the continuation of mask mandates on commercial flights (n=438)
Mask Mandate Sentiment Aligns in North America and Europe, Differs in Latin America

How do you feel about the continuation of mask mandates on commercial flights?

by region

Governments should continue to require all passengers wear masks on commercial flights

- North America (n=310): 39%
- Europe (n=102): 40%
- Latin America (n=14*): 71%

Governments should allow airlines to decide if passengers are required to wear masks

- North America (n=310): 31%
- Europe (n=102): 42%
- Latin America (n=14*): 7%

Governments should prohibit mask mandates (i.e., allow passengers to fly on any airline without masks)

- North America (n=310): 24%
- Europe (n=102): 11%
- Latin America (n=14*): 21%

Other

- North America (n=310): 6%
- Europe (n=102): 7%
- Latin America (n=14*): 0%

Q. Thinking about your company, to what extent do you think sustainability considerations will have an impact on…?

Note: Question only displayed to travel managers/procurement professionals

* Small sample size for Latin America-based respondents in recent polls (n<30)
How Has Inflation Impacted Travel Program Spending?

<table>
<thead>
<tr>
<th>Travel Category</th>
<th>Increased Spending</th>
<th>No Spending Increase</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfares</td>
<td>41%</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td>Hotel rates</td>
<td>34%</td>
<td>42%</td>
<td>24%</td>
</tr>
<tr>
<td>Car rentals</td>
<td>33%</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>Ride share/taxis</td>
<td>26%</td>
<td>41%</td>
<td>32%</td>
</tr>
<tr>
<td>Daily per diems for meals</td>
<td>19%</td>
<td>50%</td>
<td>31%</td>
</tr>
<tr>
<td>Rail travel</td>
<td>16%</td>
<td>39%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Q. How has inflation impacted your company’s business travel spending on the following expenses? (n=431-445)
Few Regional Differences When It Comes to Impact of Inflation on Travel Spending

Has inflation impacted spending on various travel categories?

% increased spending* by region

Q. How has inflation impacted your company’s business travel spending on the following expenses?

*Indicates small sample size for Latin America (n<30)
Are Some Business Travelers More Stressed Today?

Have you personally experienced or heard from your colleagues any of the following when taking business trips in 2021 and 2022? (multiple answers allowed)

- Confusion on travel restrictions/travel documentation (visas, etc.) 63%
- More anxious/stressed about travel 45%
- Challenges navigating airports and security rules 36%
- Forgot to pack key items 15%
- Other 5%
- None of the above 19%

Q. Adjusting to being back on the road isn’t easy, even for experienced business travelers. Have you personally experienced or heard from your colleagues any of the following when taking business trips in 2021/2022? Please select all that apply. (n=442)
Is There a Correlation Between “Return to Travel” and “Return to Office”? 

Q. Does your company’s “Return to the Office” plans directly correlate with “Return to Business Travel?” (n=479) 

- Yes: 41% 
- No: 46% 
- Don’t know: 8% 
- Other: 6% 

Q. Does your company’s “Return to the Office” plans directly correlate with “Return to Business Travel?” (n=479)
By Region, Return to Travel May or May Not Correlate to Return to Office

Q. Does your company’s “Return to the Office” plans directly correlate with “Return to Business Travel?”

*indicates small sample size for Latin America (n<30)
Most Companies Have Implemented Their Permanent Return to Office/Work From Home Policy

Which best describes permanent return to office/work-from-home policy?

- Our company has not yet determined/announced a permanent policy (11%)
- Our company has announced a permanent policy - but has not yet implemented it because of the COVID-19 pandemic (26%)
- Our company has implemented its permanent policy (55%)
- Other (8%)

Q. Which of the following best describes your company’s permanent return to office/work from home policy? This addresses if employees need to return to the office or can work from home all of the time or some of the time. (n=465)
Most Companies Have Implemented Their Permanent Return to Office/Work From Home Policy (Cont.)

Q. Which of the following best describes your company’s permanent return to office/work from home policy?

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

<table>
<thead>
<tr>
<th>Policy Description</th>
<th>North America (n=329)</th>
<th>Europe (n=106)</th>
<th>Latin America (n=18*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our company has not yet determined/announced a permanent policy</td>
<td>26%</td>
<td>25%</td>
<td>11%</td>
</tr>
<tr>
<td>Our company has announced a permanent policy - but has not yet implemented it because of the COVID-19 pandemic</td>
<td>7%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Our company has implemented its permanent policy</td>
<td>54%</td>
<td>58%</td>
<td>67%</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Most Companies Provide Employees Flexibility to Work From Home Post-COVID

When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply?

- Full-time in-office: Most employees will commute to the office most days
- Full-time remote: Most employees will work from home most days
- Part-time in-office/part-time remote (i.e., hybrid): Most employees will work from the office some days and work from home other days
- Flex time (employee choice)
- Other

Q. When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply? (n=461)
Will Europeans Have More Flexibility to Work From Home?

When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply?

by region

<table>
<thead>
<tr>
<th>Region</th>
<th>Full-time in-office: Most employees will commute to the office most days</th>
<th>Full-time remote: Most employees will work from home most day</th>
<th>Part-time in-office/part-time remote (i.e., hybrid): Most employees will work from the office some days and work from home other days</th>
<th>Flex time (employee choice)</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>27%</td>
<td>9%</td>
<td>48%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Europe</td>
<td>11%</td>
<td>5%</td>
<td>69%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Latin America</td>
<td>22%</td>
<td>6%</td>
<td>39%</td>
<td>22%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q. When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply? *indicates small sample size for Latin America (n<30)
Only 1 in 5 Travel Programs Have Canceled or Suspended Most or All Domestic Business Trips

Of companies have canceled or suspended most (32%) or all (13%) international trips

Of companies have canceled or suspended most (16%) or all (4%) domestic travel within their own country

Q. Thinking about your company, how has the coronavirus impacted business travel to...? (n=341-389)

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

Domestic
- 5% Do not plan
- 16% Considered
- 75% Plan to resume in 1-3 months
- 4% Not sure

All international
- 6% Do not plan
- 38% Considered
- 52% Plan to resume in 1-3 months
- 4% 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=77-153)
Where Are We Heading?

**2022**
On average, respondents expect to return to 59% of their pre-pandemic travel spend in 2022...

**2023**
...and expect to return to 79% of their pre-pandemic spend in 2023

Q. Thinking about your company’s spending on business travel, how do you expect it will compare to what business travel spend was in 2019? Your best estimate is fine. - 2022 expected spending is approximately; 2023 expected spending is approximately. . .
(n=348)