



**GBTA** Global Business  
Travel Association

Many Voices. One Purpose.

# GBTA BUSINESS TRAVEL OUTLOOK POLL RESULTS

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January 31, 2024

## Poll Results (reflects all respondents across all regions)

### 1. Which of the following best describes you?

- Travel manager / buyer / procurement / sourcing professional: 50%
- Supplier: 31%
- TMC: 11%
- Other: 8%

### 2. [SUPPLIER/TMC ONLY] Which of the following best describes the company you work for?

- Accommodations (hotel chain, independent or individual property, home rental, apartment services, other long-term stay): 41%
- Travel management company: 27%
- Ground transportation (car, ride share, taxi, chauffeur/black car or other mobility solutions): 5%
- Travel technology or distribution solutions/GDS: 6%
- Airline or private aviation solutions: 8%
- Meetings management solutions: 2%
- Payment company: 1%
- Rail provider: 1%
- Consultant: 4%
- Legal/Immigration & Visa Solutions: 2%
- Other: 3%

### 3. [BUYERS/PROCUREMENT ONLY] Which of the following industries best describes your organization?

- Accommodation and Food Services: 1%
- Arts, Entertainment, and Recreation: 2%
- Construction: 2%
- Consulting: 5%
- Educational Services: 5%
- Engineering: 4%
- Finance and Insurance: 10%
- Health Care, Pharmaceuticals and Social Assistance: 9%
- Manufacturing: 13%
- Media, Information, and Communications: 4%
- Mining, Oil and Gas Extraction and Utilities: 6%
- Non-profit, Association and Foundation: 6%
- Professional, Scientific and Technical: 2%
- Public Administration: 1%
- Retail / Wholesale Trade: 3%
- Software/Technology: 12%
- Telecommunications: 1%
- Transportation and Warehousing: 2%

- Travel and Meetings Management: 4%
  - Other (please specify): 10%
4. [BUYERS/PROCUREMENT ONLY] Thinking about your company's 2023 overall global business travel bookings versus 2022, how would you say they compare? Your best estimate is fine.
- Significantly increased: 31%
  - Moderately increased: 37%
  - Slightly increased: 15%
  - About the same/no significant change: 9%
  - Slightly decreased: 4%
  - Moderately decreased: 1%
  - Significantly decreased: 1%
  - Don't know/Not applicable: 1%
5. [BUYERS/PROCUREMENT ONLY] Thinking about your company's 2023 overall global business travel spending versus 2022, how would you say it compares? Your best estimate is fine.
- Significantly increased: 33%
  - Moderately increased: 38%
  - Slightly increased: 13%
  - About the same/no significant change: 8%
  - Slightly decreased: 4%
  - Moderately decreased: 2%
  - Significantly decreased: 1%
  - Don't know/Not applicable: 2%
6. For the global business travel industry, what is the relevance of continuing to compare and report performance in 2024 against pre-COVID levels of 2019? Do you believe pre-pandemic comparisons should continue to be used as indicators for the industry in the year ahead?
- **Yes/Strongly Agree:** Pre-pandemic comparisons are still essential to continue in 2024 - they provide a relevant benchmark for evaluating industry trends: 10%
  - **Yes/Agree:** In the coming year, pre-pandemic comparisons remain vital. They offer valuable insights and serve as a crucial baseline for assessing the industry's key metrics: 22%
  - **Neutral:** I am undecided or do not have a strong opinion on whether pre-COVID comparisons should persist as baseline indicators for the industry in 2024: 10%
  - **No/Disagree:** While pre-pandemic benchmarks were useful, they are becoming less relevant. Our industry needs to explore alternative benchmarks for a more accurate reflection of our current landscape: 38%
  - **No/Strongly Disagree:** Pre-pandemic comparisons are no longer pertinent - it is time to shift focus and adopt more forwarding looking benchmarks: 19%
  - **Other:** 1%

7. [BUYERS/PROCUREMENT ONLY] Thinking about the anticipated VOLUME of business travel (i.e., number of trips) at your company for 2024, do you expect your company will engage in more or less business travel than it did in 2023?
- We will take **a lot more** business trips (more than 20% additional business trips compared to 2023): 9%
  - We will take **more** business trips (1-20% additional business trips compared to 2023): 50%
  - We will take **about the same amount** of business trips: 28%
  - We will take **fewer** business trips (1-20% fewer business trips compared to 2023): 10%
  - We will take **a lot fewer** business trips (more than 20% fewer business trips compared to 2023): 1%
  - Not sure: 3%
8. [BUYERS/PROCUREMENT ONLY] Approximately what percentage of travel spend will be allocated to each of the following types of trips in 2024? **AVERAGES REPORTED**
- Sales/account management meetings with current or prospective customers: 36%
  - Internal company meetings with colleagues: 17%
  - External Conferences, trade shows, or industry events: 20%
  - Service trips (such as repairs, training or equipment installation) with current customers: 9%
  - Employee training or development supplier meetings: 7%
  - Supplier meetings: 9%
  - Other: 4%
9. [BUYERS/PROCUREMENT PROFESSIONALS] Thinking about anticipated business travel SPEND at your company for 2024, do you expect your company will spend more or less on business travel than it did in 2023?
- Much higher than it was last year (more than a 20% increase in business travel spending compared to 2023): 11%
  - Somewhat higher than it was last year (approximately a 1-20% increase in business travel spending compared to 2023): 55%
  - About the same as it was in 2023: 21%
  - Somewhat lower than it was last year (approximately a 1%-20% decline in business travel spending compared to 2023): 10%
  - Much lower than it was last year (more than a 20% decline in business travel spending compared to 2023): 2%
  - Don't know: 2%

10. What do you predict will be the most significant issues faced by business travel in 2024? **SELECT AND RANK YOUR TOP 3**

- Overall economic concerns (i.e., inflation/recession): 46%
- Rising costs of travel (i.e., airfares, hotel stays, car rental, etc.): 66%
- Corporate budgets not keeping pace with needs: 42%
- Travel disruptions (i.e., flight/rail delays and cancellations, long lines at check-in or security or strike action): 32%
- Climate impact/sustainability concerns: 19%
- Traveler confidence/willingness to travel: 5%
- Concerns of frequent travelers (such as entitlements, upgrades, and well-being): 8%
- Technology advancements / artificial intelligence: 19%
- Geo-political concerns: 22%
- Pandemic concerns: 1%
- Workforce hiring/retention: 9%
- Remote work and hybrid office rules: 13%
- Passport/visa processing times and/or delays: 3%
- Meeting & event space availability and ease of booking: 6%
- Other: 3%

11. [BUYERS/PROCUREMENT PROFESSIONALS] Do you expect the staffing level of your internal travel program team to increase in 2024?

- I expect staffing to increase: 14%
- I expect no change: 64%
- I expect no change on my team, but we are partnering more with internal teams who help my team do more: 12%
- I expect staffing level to decrease: 6%
- I don't know/Not applicable: 4%

12. [TRAVEL SUPPLIERS/TMCs ONLY] Do you expect the staffing level of your company overall company to increase in 2024?

- I expect staffing to increase: 46%
- I expect no change: 36%
- I expect staffing level to decrease: 7%
- I don't know/Not applicable: 11%

13. In your view, what will be the biggest barriers that the global business travel industry will face in 2024 toward achieving a robust, diverse, and sustainable workforce? **SELECT YOUR TOP 5 AND RANK IN ORDER, WITH ONE BEING MOST IMPORTANT.**

- Salary levels and benefits are not attractive to new talent: 53%
- Lack of qualified candidates/talent applying for roles with sufficient qualifications or experience: 48%
- Hiring and training required for new professionals coming from outside the travel industry: 36%
- Job roles/requirements are not attractive to new talent considering entering the industry: 39%

- Organizations not investing to retain talent and/or support professional development: 40%
- Inadequate budget for new roles and/or perception by candidates that salary and benefits are inadequate: 45%
- Inadequate professional development pathways within the industry: 22%
- Existing workforce largely lacks the skillsets/talent needed for the future workplace: 23%
- Industry is perceived as not welcoming diverse candidates: 9%
- Incoming workforce is looking for remote positions (instead of in-office): 37%
- Incoming workforce is looking for in-office positions (instead of remote): 4%

14. [BUYERS/PROCUREMENT PROFESSIONALS] Thinking about your company's employees, please rate their current willingness to travel for business.

- Very willing: 58%
- Somewhat willing: 33%
- Neither willing nor unwilling: 6%
- Not willing: 1%
- Not willing at all: 0%
- Don't know/not sure: 2%
- Other: 1%

15. Which of the following best describes your company's permanent return to office/work-from-home policy in 2024?

- Full-time in-office: Most employees will commute to the office most days: 16%
- Full-time remote: Most employees will work from home most days: 11%
- 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: 62%
- Flex time (employee choice): 9%
- Other: 2%
- Not sure: 0%

16. [IF Q15 = HYBRID or REMOTE] Has your company added or revised its business travel policy/program as a result of your hybrid/remote work environment?

- Yes, we have put new/updated guidelines in place: 27%
- No, not yet but we are planning to / working on it: 21%
- No, and we don't currently have an intention/plan to do so: 40%
- Don't know: 9%
- Other: 3%

17. [IF Q15 = HYBRID or REMOTE] To what degree has your company experienced an increase in “internal meeting” business travel spending to accommodate employees who are now commuting into a company office location from out of town because of a remote or hybrid work model?

- Our employee travel expenses are now significantly higher as a result: 4%
- Our employee travel expenses are now somewhat higher as a result: 23%
- Our employee travel expenses are about the same. We haven't seen much change: 37%
- Not applicable/this isn't an issue for our company: 32%
- Other: 4%