GBTA BUSINESS TRAVEL OUTLOOK POLL RESULTS

April 26, 2023
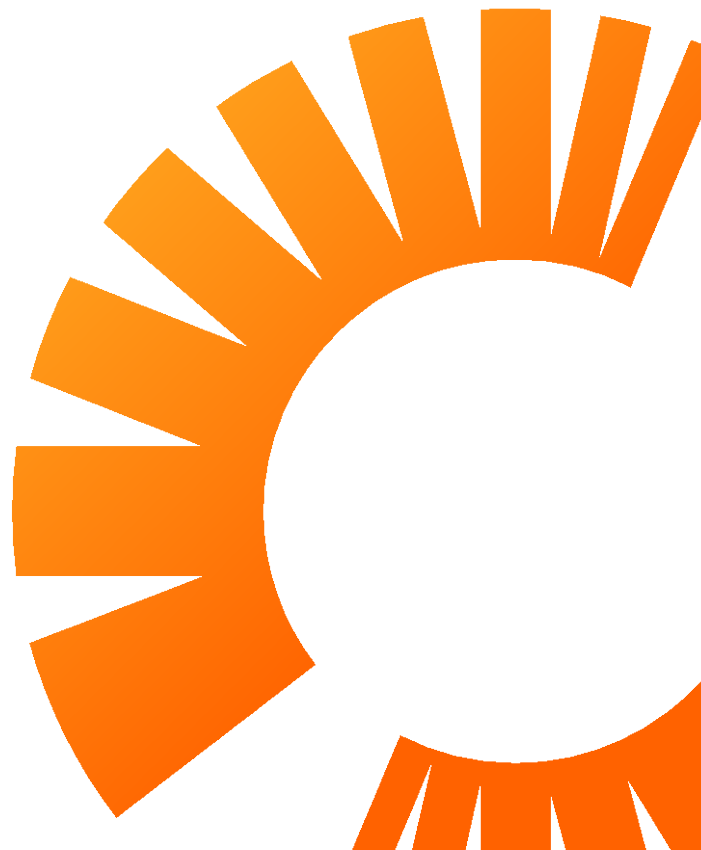
Poll Results

1. Which of the following best describes you?

   - Travel manager / buyer: 42%
   - Procurement / sourcing professional: 7%
   - Supplier: 25%
   - TMC: 15%
   - Other: 11%

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

   - Hotel chain: 25%
   - Travel management company: 36%
   - Ground transportation: 8%
   - Individual hotel property: 4%
   - Travel technology: 10%
   - Airline: 7%
   - Meetings management provider: 1%
   - Payment company: 2%
   - Consultant: 2%
   - Global distribution system (GDS): 2%
   - Other: 3%

3. 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 New Distribution Capability (NDC). Do you support this effort?

   - Yes: 34%
   - No: 47%
   - I am not familiar with NDC: 20%

4. [DISPLAY IF BUYER/PROCUREMENT] Has your travel program been impacted by similar moves to integrate NDC by other carriers?

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

5. [DISPLAY IF BUYER/PROCUREMENT] In general, do you feel you need more information or education about NDC / airline retailing / distribution?

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

6. [DISPLAY IF BUYER/PROCUREMENT] 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%

7. [DISPLAY IF BUYER/PROCUREMENT] Have you budgeted for potential additional servicing costs for NDC-related bookings?

   - Yes: 4%
   - Not yet but our budgeting process is underway: 23%
   - No, we haven't and don't intend to do so: 61%
   - Not sure: 11%

8. [DISPLAY IF BUYER/PROCUREMENT] 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: 1%
   - We have started to implement NDC, and the transition has largely gone smoothly – but we have experienced a few challenges: 3%
   - We have experienced some challenges when it comes to NDC implementation: 7%
   - We have experienced many challenges when it comes to NDC implementation: 7%
   - We have not started to implement NDC: 48%
   - It's too early to say: 25%
   - Not sure: 8%

9. [DISPLAY IF TMC OR TMC OR GDS/OBT] Thinking about your company's ability to distribute NDC content to your corporate clients, which statement best represents your experience?

   - It has gone smoothly – we have made NDC content available to clients without experiencing any challenges: 6%
   - 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: 12%
   - We have experienced some challenges when it comes to NDC content distribution: 13%
   - We have experienced many challenges when it comes to NDC content distribution: 23%
   - We have largely not made NDC content available to corporate clients: 18%
   - It is too early to say: 23%
   - Not sure: 5%

10. [DISPLAY IF BUYER/PROCUREMENT] Thinking about the overall roll-out of NDC in the industry, which of the following best describes your view?

- 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: 53%
- 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: 29%
- Not sure: 13%
- Other: 4%

11. [DISPLAY IF Q3=AIRLINE] As an airline, are you looking to change your distribution strategy based on recent NDC-related ecosystem activities by certain carriers?

- Yes, we've already completed making distribution strategy changes: 12%
- Yes, we have changes in progress: 32%
- We are considering making changes but haven't taken action: 26%
- No, we have no plans to make changes / taking a wait and see approach: 16%
- Don't know: 5%

12. Is your company experiencing labor shortages and/or challenges recruiting staff?

- Yes, significant labor shortages and recruiting challenges across the company: 10%
- Yes, there are some labor shortages and recruitment challenges in some company departments: 48%
- No, there are no significant labor shortages or recruiting challenges at my company: 36%
- Not sure: 6%

13. What types of positions do you think are most needed at your company? Please select up to three.

- Technology development: 31%
- Entry level / operations: 26%
- Sales and account management: 24%
- Travel consultants / agents: 17%
- Data analysis: 16%
- Procurement / sourcing: 10%
- Marketing and communications: 8%
- Executive level: 8%
- Meetings managers: 7%
- Accounting: 7%
- Travel manager / buyer: 4%
- N/A: 18%
- Other: 10%

14. 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.

- Hotels: 59%
- TMCs: 43%
- Restaurants: 37%
- Airports: 28%
- Aviation: 27%
- Travel technology: 13%
- Ground transportation: 12%
- Meetings management: 7%
- Online booking tools (OBTs): 7%
- Global distribution systems (GDSs): 4%
- Payment companies: 3%
- Consulting: 3%
- Buy-side companies: 1%
- Other: 3%
- None of the above: 5%

15. 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?

    - Salary levels and benefits are not attractive to new talent: 69%
    - Lack of candidates with sufficient qualifications or experience: 50%
    - Hiring and training required for new professionals coming from outside the travel industry: 46%
    - Job requirements are not attractive to new talent: 46%
    - Organizations not invested in retaining talent and supporting professional development: 46%
    - Incoming workforce is looking for remote positions (instead of in-office): 43%
    - Inadequate budget for new roles: 37%
    - Inadequate professional development pathways within the industry: 34%
    - Existing workforce largely lacks the skillsets/talent needed for the future workplace: 33%
    - Industry is perceived as not welcoming diverse candidates: 8%
    - Incoming workforce is looking for in-office positions (instead of remote): 6%
    - Other: 4%

16. Thinking about your last business trip, how would you rate your overall experience while traveling? Note: This asks about your in-trip experience while traveling and does not include pre-trip factors such as ease of booking or whether you actually were productive / successful at your business meeting.

    - I have not traveled for business recently: 17%
    - Very pleasant: 29%
    - Somewhat pleasant: 31%
    - Neither pleasant nor unpleasant: 14%
    - Somewhat unpleasant: 9%
    - Very unpleasant: 1%

17. 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.]

    - Greatly reduced my willingness to travel for work: 9%
    - Somewhat reduced my willingness to travel for work: 41%
    - Not affected my willingness to travel for work: 48%
    - Not sure: 1%

18. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your role as a travel manager, have you frequently heard complaints from employees about the following? Select all that apply.

    - Delayed flights: 76%
    - Canceled flights: 72%
    - Long wait times on the phone with our travel management company: 62%
    - Long wait times on the phone with travel suppliers (e.g., airlines or hotels): 52%
    - Hotel accommodations with poor service quality: 46%
    - Long lines for airport security: 39%
    - Unexpected costs charges while on a business trip: 29%
    - Crowded airports: 27%
    - Long lines to check-in / drop bags at airports or hotels: 24%
    - Long wait for ground transportation / ride share services: 22%
    - Restaurants with poor service quality: 21%
    - Difficulty finding a comfortable / adequate hotel:17%
    - Other: 9%
    - None of the above: 1%

19. [BUYER/PROCUREMENT] Thinking about your company's current **domestic business travel** <u>**bookings**</u>, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at…? Your best estimate is fine.

    Estimated average: 72% of pre-pandemic bookings

    - Less than 10% of our pre-pandemic bookings: 1%
    - 11-20% of our pre-pandemic bookings: 3%
    - 21-30% of our pre-pandemic bookings: 4%
    - 31-40% of our pre-pandemic bookings: 4%
    - 41-50% of our pre-pandemic bookings: 7%
    - 51-60% of our pre-pandemic bookings: 10%
    - 61-70% of our pre-pandemic bookings: 11%
    - 71-80% of our pre-pandemic bookings: 14%
    - 81-90% of our pre-pandemic bookings: 14%
    - 91-100% of our pre-pandemic bookings: 13%
    - We have already exceeded our pre-pandemic domestic bookings: 16%
    - Not sure: 5%

20. [BUYER/PROCUREMENT] Thinking about your company's current **international business travel <u>bookings</u>**, how do they compare to the pre- pandemic (2019) level? Would you say your company is currently at…? Your best estimate is fine.

    Estimated average: 63% of pre-pandemic bookings

    - Less than 10% of our pre-pandemic bookings: 4%
    - 11-20% of our pre-pandemic bookings: 4%
    - 21-30% of our pre-pandemic bookings: 6%
    - 31-40% of our pre-pandemic bookings: 8%
    - 41-50% of our pre-pandemic bookings: 8%
    - 51-60% of our pre-pandemic bookings: 8%
    - 61-70% of our pre-pandemic bookings: 14%
    - 71-80% of our pre-pandemic bookings: 7%
    - 81-90% of our pre-pandemic bookings: 11%
    - 91-100% of our pre-pandemic bookings: 5%
    - We have already exceeded our pre-pandemic international bookings: 12%
    - Not sure: 6%

21. [BUYER/PROCUREMENT] Thinking about your company's current **domestic business travel <u>spend</u>**, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at…? Your best estimate is fine.

    Estimated average: 74% of pre-pandemic spend

    - Less than 10% of our pre-pandemic spend: 1%
    - 11-20% of our pre-pandemic spend: 3%
    - 21-30% of our pre-pandemic spend: 3%
    - 31-40% of our pre-pandemic spend: 6%
    - 41-50% of our pre-pandemic spend: 5%
    - 51-60% of our pre-pandemic spend: 7%
    - 61-70% of our pre-pandemic spend:13%
    - 71-80% of our pre-pandemic spend: 10%
    - 81-90% of our pre-pandemic spend: 11%
    - 91-100% of our pre-pandemic spend: 14%
    - We have already exceeded our pre-pandemic domestic spend: 21%
    - Not sure: 6%

22. [BUYER/PROCUREMENT] Thinking about your company's current **international business travel <u>spend</u>**, how does it compare to the pre-pandemic (2019) level? Would you say your company is currently at…? Your best estimate is fine.

    Estimated average: 66% of pre-pandemic spend

    - Less than 10% of our pre-pandemic spend:3%
    - 11-20% of our pre-pandemic spend: 3%
    - 21-30% of our pre-pandemic spend: 7%

- 31-40% of our pre-pandemic spend: 6%
- 41-50% of our pre-pandemic spend: 10%
- 51-60% of our pre-pandemic spend: 8%
- 61-70% of our pre-pandemic spend: 8%
- 71-80% of our pre-pandemic spend: 12%
- 81-90% of our pre-pandemic spend: 8%
- 91-100% of our pre-pandemic spend: 8%
- We have already exceeded our pre-pandemic domestic spend: 18%
- Not sure: 8%

23. [DISPLAY IF BUYER/PROCUREMENT] Which of the following industries best describes your organization?

- Accommodation and Food Services: 2%
- Arts, Entertainment, and Recreation: 2%
- Construction: 2%
- Consulting: 3%
- Educational Services: 4%
- Engineering: 3%
- Finance and Insurance: 13%
- Health Care, Pharmaceuticals and Social Assistance: 9%
- Manufacturing: 15%
- Media, Information, and Communications: 4%
- Mining, Oil and Gas Extraction and Utilities: 4%
- Non-profit, Association and Foundation: 4%
- Professional, Scientific and Technical: 4%
- Public Administration: 1%
- Retail / Wholesale Trade: 2%
- Software/Technology: 13%
- Telecommunications: 1%
- Transportation and Warehousing: 2%
- Travel and Meetings Management: 4%
- Other (please specify): 10%