



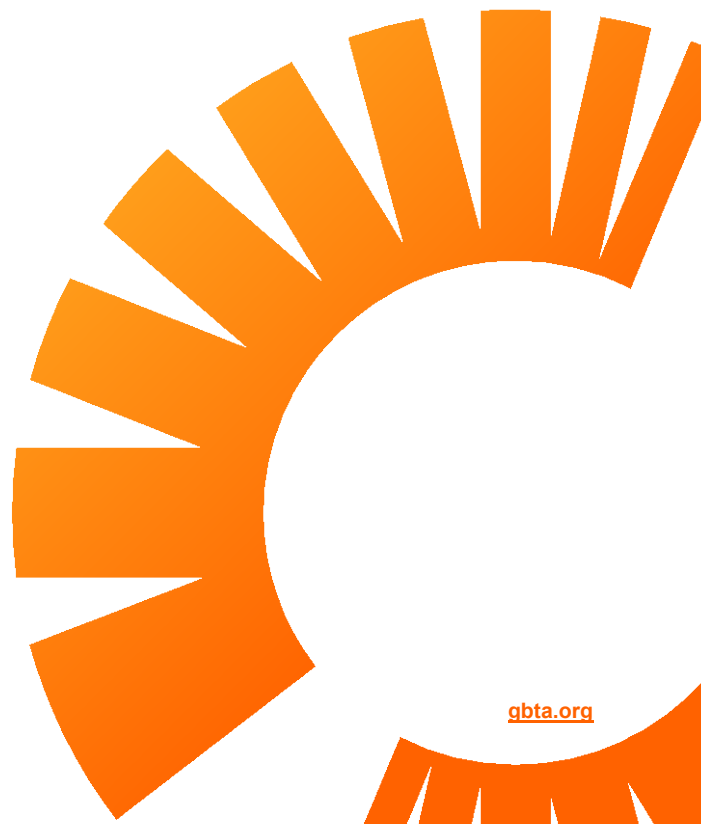
**GBTA** Global Business  
Travel Association

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# GLOBAL BUSINESS TRAVEL IMPACT AND OUTLOOK DUE TO RECENT U.S. GOVERNMENT ACTIONS

April 16, 2025



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

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

- Travel manager / buyer / procurement / sourcing professional: 49%
- Supplier: 27%
- TMC: 12%
- Other: 12%

### 2. Thinking about your role at your organization, in which of the following regions do you have responsibilities?

	All	Buyers	Suppliers
Globally	55%	61%	48%
North America	26%	26%	30%
Europe	13%	12%	15%
APAC	13%	12%	11%
Latin America	7%	7%	7%
Middle East	5%	6%	5%
Africa	3%	3%	2%

### 3. What was your company's total travel spend in 2024 in U.S. dollars (including air, hotel, car rentals, meetings, etc.)? Please use your best estimate.

- Less than \$10 million: 27%
- \$10 million to less than \$30 million: 27%
- \$30 million or more: 41%
- Not sure: 4%

### 4. Approximately how many employees at your company travel regularly (at least twice a year) for work? Your best estimate is fine.

- 500 or fewer: 43%
- 500 to 5,000: 29%
- More than 5,000: 22%
- Don't know: 6%

### 5. [SUPPLIERS/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): 37%
- Travel management company: 29%
- Ground transportation (car, ride share, taxi, chauffeur/black car or other mobility solutions): 7%
- Travel technology or distribution solutions/GDS: 8%
- Airline or private aviation solutions: 11%
- Meetings management solutions: 1%

- Payment company: 1%
  - Rail provider: 0%
  - Consultant: 1%
  - Legal/Immigration/Visa Services: 1%
  - Other: 4%
6. [BUYERS ONLY] Thinking about 2025 as a whole, how do you think your organization's **business travel volume** (i.e., number of trips taken) will be impacted as a result of U.S. government announcements/actions? Estimates are fine.
- Our business trip volume will decrease: 29%
    - Average expected decrease: 21%
  - Our business trip volume will increase: 9%
    - Average expected increase: 11%
  - Our business trip volume won't change / won't be impacted: 44%
  - Don't know/Not applicable: 19%
7. [BUYERS ONLY] Thinking about 2025 as a whole, how do you think your organization's **business travel spending** will be impacted as a result of U.S. government announcements / actions? Estimates are fine.
- Our business travel spending will decrease: 27%
    - Average expected decrease: 20%
  - Our business travel spending will increase: 11%
    - Average expected increase: 11%
  - Our business travel spending won't change / won't be impacted: 44%
  - Don't know/Not applicable: 18%
8. [SUPPLIERS/TMC ONLY] Thinking about 2025 as a whole, how do you think has your organization's **business travel revenue** will be impacted as a result of U.S. government announcements/actions? Estimates are fine.
- Our business travel revenue will decrease: 37%
    - Average expected decrease: 18%
  - Our business travel revenue will increase: 7%
    - Average expected increase: 15%
  - Our business travel revenue won't change / won't be impacted: 25%
  - Don't know/Not applicable: 31%
9. [BUYERS ONLY] Has your organization **adjusted or revised your policy** for business travel to or from the U.S. since January 2025 as a result of U.S. government announcements / actions?
- Yes: 7%
  - No: 64%
  - Not yet, but we plan to do so: 9%
  - Not yet, but we are considering doing so: 16%
  - Don't know: 3%

10. [BUYERS ONLY] Has your organization **done the following** since January 2025 as a result of U.S. government announcements or actions?

	Yes	No	Not yet, but plan to do so	Not yet, but considering doing so	Don't know
Canceled meetings based in the U.S.	13%	76%	2%	4%	6%
Canceled sending employees to events in the U.S.	10%	73%	4%	6%	6%
Canceled events in the U.S.	10%	79%	1%	3%	6%
Relocated meetings to locations outside the U.S.	8%	78%	2%	4%	8%
Relocated events to locations outside the U.S.	6%	78%	3%	5%	8%
Shifted meeting/event to online / virtual format	19%	68%	2%	4%	7%

11. Thinking about the remainder of 2025, what are your **biggest concerns** about the potential long-term impact of the U.S. government announcements or actions? Please select up to five.

- Higher costs related to business travel: 54%
- Additional processing / administration needs (visas, documentation etc.): 46%
- Business travel budget cuts: 40%
- Increased safety / duty of care needs: 37%
- Decreased non-U.S. based employee willingness to travel to the U.S. for work: 37%
- Decreased employee willingness to travel for work: 31%
- Loss of customers / clients/partners: 27%
- Loss of market access/market share: 23%
- Border detentions: 22%
- Other: 5%
- Don't know: 8%

12. Thinking about the remainder of 2025, how do you feel about the **overall outlook** for the business travel industry?

- Optimistic / Very optimistic: 31%
- Neither optimistic nor pessimistic: 40%
- Pessimistic/Very pessimistic: 26%
- Don't know: 3%

13. Do you personally **know anyone who has had a trip affected** (whether business or leisure) by recent U.S. border or travel policy changes?

- Yes: 23%
- No: 77%