



**GBTA** Global Business  
Travel Association

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# GBTA BUSINESS TRAVEL OUTLOOK POLL RESULTS

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February 13, 2025

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

1. Which of the following best describes you?

- Travel manager / buyer / procurement / sourcing professional: 55%
- Supplier: 28%
- TMC:9%
- Other: 7%

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

	All	Buyers	Suppliers
Globally	52%	59%	42%
North America	27%	21%	36%
Europe	13%	13%	12%
APAC	8%	8%	8%
Latin America	6%	7%	5%
Middle East	2%	3%	1%
Africa	1%	2%	0%

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: 35%
- \$10 million to less than \$30 million: 25%
- \$30 million or more: 38%
- Not sure: 3%

4. [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: 24%
- Ground transportation (car, ride share, taxi, chauffeur/black car or other mobility solutions): 6%
- Travel technology or distribution solutions/GDS: 9%
- Airline or private aviation solutions: 11%
- Meetings management solutions: 1%
- Payment company: 2%
- Consultant: 3%
- Legal/Immigration/Visa Services:2%
- Other: 6%

5. [BUYERS ONLY] Thinking about your company's overall business travel bookings last year (2024), how did they compare to the prior year (2023)? Your best estimate is fine.
  - Significantly Increased: 18%
  - Moderately increased: 31%
  - Slightly increased: 22%
  - About the same/no significant change: 15%
  - Slightly decreased: 9%
  - Moderately decreased: 3%
  - Significantly decreased: 1%
  - Don't know/Not applicable: 1%
  
6. [BUYERS ONLY] Thinking about your company's overall business travel spending last year (2024), how did it compare to the prior year (2023)? Your best estimate is fine.
  - Significantly Increased: 21%
  - Moderately increased: 33%
  - Slightly increased: 23%
  - About the same/no significant change: 11%
  - Slightly decreased: 7%
  - Moderately decreased: 3%
  - Significantly decreased: 1%
  - Don't know/Not applicable: 1%
  
7. [BUYERS ONLY] Thinking about the anticipated VOLUME of business travel (i.e., number of trips) at your company for 2025, do you expect your company will engage in more or less business travel than it did in 2024?
  - We will likely take a lot more business trips (more than 20% additional business trips compared to 2024): 6%
  - We will likely take more business trips (1-20% additional business trips compared to 2024): 42%
  - We will likely take about the same amount of business trips: 39%
  - We will likely take fewer business trips (1-20% fewer business trips compared to 2024): 10%
  - We will likely take a lot fewer business trips (more than 20% fewer business trips compared to 2024): 2%
  - Not sure: 1%

8. [BUYERS ONLY] Thinking about the anticipated SPENDING on business travel at your company for 2025, do you expect it will be higher or lower than it was in 2024?
- We will likely spend a lot more on business travel (an increase of 20% or more compared to 2024): 6%
  - We will likely spend more on business travel (1-20% increase compared to 2024): 51%
  - We will likely spend about the same amount on business travel: 31%
  - We will likely spend less on business travel (1-20% decrease compared to 2024): 10%
  - We will likely spend a lot less on business travel (a decrease of 20% or more compared to 2024): 2%
  - Not sure: 1%
9. [BUYERS ONLY] Thinking about your organization, approximately what percentage of travel spend do you expect will be allocated to each of the following types of business trips in 2025?

Travel type	BUYERS
Sales/account management meetings with current or prospective customers	27%
Internal company meetings with colleagues	14%
External conferences, trade shows, or industry events	14%
Service trips (such as repairs, training or equipment installation) with current customers	13%
Supplier meetings	6%
Employee training or development supplier meetings	7%
Other	7%

10. [BUYERS ONLY] Looking ahead at 2025, how do you expect the following will change at your organization compared to 2024?

	Increase somewhat / significantly	Remain the same	Decrease Somewhat / significantly	N/A or Not Sure
Transient business travel	51%	38%	7%	4%
External Meeting / Conference travel	33%	54%	9%	3%
Company-held meetings / conferences	37%	48%	10%	5%
Group business travel	31%	47%	16%	6%
Project-based business travel	47%	42%	5%	6%

11. [BUYERS ONLY] Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?

	Yes	No	Don't Know
Adopting New Distribution Capability (NDC)/increasing the number of NDC bookings made within our program	48%	26%	26%
Evaluating/changing our corporate payment solutions (e.g., corporate cards or virtual payment solution)	41%	45%	15%
Evaluating/implementing other major new technology within our ecosystem	41%	39%	20%
Implementing a Sustainable Practice element to our program	36%	41%	23%
Making significant changes or revisions to our corporate travel policy	34%	52%	14%
Applying Artificial Intelligence (AI) within our travel program in significant ways	34%	30%	36%
Evaluating/changing our corporate booking tool	31%	59%	10%
Evaluating/changing our TMC	30%	55%	15%
Consolidating/combining travel management with related functions (e.g., meetings and events management)	30%	52%	18%
Implementing a new technology/service specific to achieving our travel sustainability goals	28%	52%	19%
Implementing more / new direct-connects to supplier sites	28%	50%	22%
Evaluating/changing our expense tool	20%	69%	12%
Implementing a new TMC	17%	66%	17%
The travel function is moving to a new department (e.g., from Finance to Procurement)	6%	83%	11%
Other	3%	37%	60%

12. [BUYERS WHO SAY “YES EVALUATING TMC”] You mentioned your travel program is evaluating or changing its TMC--or implementing a new TMC in 2025. Which of the following are reasons why? Please select all that apply.

Dissatisfaction with current TMC's technology	39%
Dissatisfaction with current TMC's quality of service	37%
We automatically go out to bid in regular intervals (e.g., every five years)	29%
Cost	28%
Dissatisfaction with current TMC's ability to offer/service NDC bookings	20%
We want to reduce the number of TMCs that we work with (e.g., TMC consolidation)	16%
Our current TMC(s) could merge or be acquired	16%
We want to work with new TMCs that specialize in particular regions or countries	10%
Other	10%
Concerns about our current TMC's financial position/solvency	8%
We are merging with another company	3%
None of the above	6%

13. What do you predict will be the most significant issues faced by business travel in 2025? Please select up to 5.

	All	Buyers	Suppliers
Rising costs of travel (i.e., airfares, hotel stays, car rental, etc.)	69%	81%	57%
Corporate budgets not keeping pace with needs	51%	50%	50%
Overall economic concerns (i.e., inflation/recession)	50%	49%	55%
Geo-political concerns	46%	44%	48%
Technology advancements / artificial intelligence	38%	32%	47%
Travel disruptions (i.e., flight/rail delays and cancellations, long lines at check-in or security or strike action)	33%	37%	29%
Climate impact/sustainability concerns	25%	24%	25%
Border crossing concerns (Passport/Visa processing times and/or delays)	22%	23%	20%
Remote work and hybrid office rules	18%	13%	24%
Concerns of frequent travelers (such as entitlements, upgrades, and well-being)	16%	17%	14%
Workforce hiring/retention	14%	9%	20%
Meeting & event space availability and ease of booking	12%	14%	10%
Traveler confidence/willingness to travel	6%	5%	8%
Other	2%	2%	2%

14. [BUYERS ONLY] Do you expect the staffing level of your internal travel program team to increase in 2025?

- I expect the staffing level to increase: 16%
- 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: 9%
- I expect the staffing level to decrease: 5%
- I don't know/Not applicable: 6%

15. [BUYERS ONLY Q14 WHO EXPECT A DECREASE OR REMAIN THE SAME] You mentioned you expect your travel program's staff size will decrease or remain the same this year. Which of the following are reasons why? Please select all that apply

- We don't need more internal travel staff: 45%
- Lack of budget: 37%
- We expect travel volumes to decrease or remain the same: 19%
- Efficiencies achieved through Artificial Intelligence (AI) or other technologies: 18%
- We expect to outsource more work to third parties (e.g., TMC or consultants): 13%
- We expect to receive more help from other teams within our organization (e.g., meetings management or Finance): 11%
- Other (please specify): 4%
- None of the above: 2%

16. [SUPPLIER/TMC ONLY] Do you expect the staffing level of your overall company to increase in 2025? Note: This asks about the staff size of your current company.

- I expect the staffing level to increase: 41%
- I expect no change: 38%
- I expect the staffing level to decrease: 6%
- I don't know/Not applicable: 15%

17. [SUPPLIER/TMC ONLY WHO EXPECT DECREASE OR REMAIN THE SAME IN Q16] You mentioned your company's staff size will decrease or remain the same. Which of the following are reasons why? Please select all that apply.

- We don't need more staff: 42%
- Efficiencies achieved through Artificial Intelligence (AI) or other technologies: 31%
- Lack of budget: 30%
- We expect less demand/tepid demand for our products/services: 8%
- We expect to outsource more work to third parties (e.g., consultants or partners): 14%
- Impending merger or acquisition: 6%
- Other (please specify): 4%
- None of the above: 8%

18. Thinking about the business travel industry in the past year, would you say?

	All	Buyers	Suppliers
It has been difficult to fill open positions with qualified / talented candidates	40%	36%	45%
There is a surplus of qualified/talented candidates; it has been easy to fill open positions with the right candidates	5%	5%	4%
It has sometimes been easy to fill open positions with qualified/talented candidates; it has sometimes been difficult	25%	19%	32%
Other	4%	4%	3%
Not sure	27%	36%	15%

19. [DISPLAY IF Q18 = DIFFICULT TO FILL OPEN POSITIONS] In your view, what will be the biggest barriers that the global business travel industry will face in 2025 toward achieving a robust, workforce? Please select all that apply.

	All	Buyers	Suppliers
Salary levels and benefits are not attractive to new talent	54%	50%	58%
Lack of qualified candidates/talent applying for roles with sufficient qualifications or experience	54%	53%	57%
Incoming workforce is looking for remote positions (instead of in-office)	42%	39%	47%
Inadequate budget for new roles and/or perception by candidates that salary and benefits are inadequate	40%	39%	44%
Organizations not investing in retaining talent and/or supporting professional development	35%	31%	36%
Inadequate professional development pathways within the industry	34%	39%	31%
Job roles/requirements are not attractive to new talent considering entering the industry	31%	31%	32%
Hiring and training required for new professionals coming from outside the travel industry	30%	35%	28%
Existing workforce largely lacks the skillsets/talent needed for the future workplace	26%	28%	27%
Industry is perceived as not welcoming diverse candidates	7%	4%	9%
Incoming workforce is looking for office positions (instead of remote)	5%	3%	8%

20. Which of the following best describes your company’s permanent return to office/work-from home policy in 2025?

	All	Buyers	Suppliers
Full-time in-office: Most employees will commute to the office most days	22%	14%	31%
Full-time remote: Most employees will work from home most days	11%	6%	14%
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	59%	71%	49%
Flex time (employee choice)	8%	9%	6%



21. Thinking about your organization’s Work-From-Home (WFH) policies, how have they changed in the past year?

	All	Buyers	Suppliers
They have not changed	51%	54%	48%
They have become more flexible: We are giving employees greater flexibility to work from home	14%	13%	15%
They have become stricter: We are requiring employees to work at an office or job site more often or are more strictly enforcing requirements that we already had	32%	31%	34%
Other (please specify)	3%	2%	3%

22. Compared to 2024, what level of investment / support do you anticipate in 2025 for planet-focused sustainable business travel practices at your company (e.g., addressing the environmental / emissions footprint of your program)?

	All	Buyers	Suppliers
Our company will increase	39%	33%	48%
Our company will decrease	4%	4%	4%
Our company will stay the same	41%	46%	35%
Don’t know	16%	17%	13%

23. Compared to 2024, what level of investment / support do you anticipate in 2025 for people-focused initiatives at your company (such as accessibility and inclusion)?

	All	Buyers	Suppliers
Our company will increase	29%	22%	37%
Our company will decrease	4%	5%	4%
Our company will stay the same	45%	49%	40%
Don’t know	23%	25%	19%

24. Which of the following industries best describes your organization?

- Accommodation and Food Services: 1%
- Arts, Entertainment, and Recreation: 2%
- Construction: 1%
- Consulting: 5%
- Educational Services: 2%
- Engineering: 5%
- Finance and Insurance: 12%
- Health Care, Pharmaceuticals and Social Assistance: 8%
- Manufacturing: 14%
- Media, Information, and Communications: 2%
- Mining, Oil and Gas Extraction and Utilities: 6%
- Non-profit, Association and Foundation: 5%
- Professional, Scientific and Technical: 4%

- Public Administration: 2%
- Retail / Wholesale Trade: 5%
- Software/Technology: 11%
- Telecommunications: 2%
- Transportation and Warehousing: 2%
- Travel and Meetings Management: 1%
- Other: 12%