



**GBTA** Global Business  
Travel Association

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# GBTA BUSINESS TRAVEL OUTLOOK POLL RESULTS

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November 18, 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: 32%
  - TMC: 11%
  - Other: 7%
  
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): 40%
  - Travel management company: 25%
  - Ground transportation (car, ride share, taxi, chauffeur/black car or other mobility solutions): 8%
  - Travel technology or distribution solutions/GDS: 7%
  - Airline or private aviation solutions: 8%
  - Meetings management solutions: 1%
  - Payment company: 2%
  - Consultant: 1%
  - Other: 7%
  
3. Which of the following most closely resembles your career level?
  - Senior Executive (President, CEO, COO, CFO, etc.): 8%
  - Executive (SVP, VP, Department Head, etc.): 15%
  - Director: 27%
  - Manager (Manager/supervisor of staff): 35%
  - Experienced staff (non-manager): 13%
  - Entry level staff: 1%
  
4. [BUYER/PROCUREMENT ONLY] Looking back since the beginning of the year, overall, how do you think business travel as a sector has fared in 2024?
  - Better than what I expected: 27%
  - On par with what I expected: 59%
  - Worse than what I expected: 11%
  - Don't know: 2%

5. [BUYER/PROCUREMENT ONLY] What factors do you perceive as the most significant developments that has (or will) support the overall business travel sector in 2024?

- Easing travel costs/corporate budgets keeping pace: 46%
- Improving economy/inflation reduction: 44%
- Increased traveler confidence/requests for more travel: 40%
- New technology/tech trends: 39%
- Reduction in travel disruptions: 34%
- Stronger workforce hiring and retention: 23%
- Improving geo-politics: 13%
- Other: 3%

6. [BUYER/PROCUREMENT] To what degree have you seen the following patterns or preferences evolve in 2024 (versus 2023) among your company's business travelers?

	<b>Much/Somewhat More</b>	<b>About the same</b>	<b>Somewhat/Much Less</b>
Employees want to travel less	17%	48%	34%
Employees want to travel more	45%	38%	17%
Employees taking direct flights	36%	59%	5%
Employees taking connecting flights	11%	63%	26%
Justification of same-day trips	17%	58%	25%
Employees using rail/trains	38%	50%	12%
Rental of electric vehicles	26%	53%	22%
Employees choosing to stay in sustainable	22%	71%	7%
Employees replacing in person meetings with virtual meetings	35%	35%	31%
Employees attending meetings and conferences in person	59%	29%	11%
"Blended" travel (employees extending/combining work trips with leisure)	46%	44%	9%
Employees bringing family members to accompany them on business trips	19%	55%	25%
"Linked" business trips	53%	44%	4%
Multimodal trips	33%	60%	8%
Business class / Luxury / premium / first-class business travel	20%	51%	29%
Premium economy business travel	35%	52%	13%
Economy class business travel	34%	56%	10%
Private aviation usage in my company	13%	47%	41%
Longer duration of business trips	34%	49%	14%
Employees taking day trips	19%	49%	25%

7. Thinking about the year ahead, how do you feel about the overall outlook for the business travel industry?
  - Very optimistic: 12%
  - Optimistic: 55%
  - Neither optimistic nor pessimistic: 26%
  - Pessimistic: 6%
  - Very pessimistic: 0%
  - Don't know: 1%
  
8. [BUYER/PROCUREMENT] How do you anticipate your company's 2025 travel spending will compare (or is likely to compare) to your 2024 spending?
  - Significantly higher (more than 25%): 7%
  - Higher (1-25%): 45%
  - The same as the 2024 travel budget: 31%
  - Lower than the 2024 travel budget (a decrease of 1-25%): 15%
  - Significantly lower than the 2024 travel budget (a decrease of more than 25%): 1%
  - Don't know: 2%
  
9. [BUYER/PROCUREMENT] Thinking about your company's 2025 travel spend, approximately what percent of likely be allocated to the following purposes? [AVERAGE]
  - Conferences, trade shows or industry events: 15.6%
  - Internal company meetings with colleagues: 19.7%
  - Sales/account management/customer prospect meetings: 28.0%
  - Service trips: 11.7%
  - Supplier meetings: 8.3%
  - Employee training / development: 9.7%
  - Other: 6.9%
  
10. [BUYER/PROCUREMENT] Looking ahead to 2025 in terms of economic considerations, which of the following best describes your likely approach? SELECT ONE
  - We are unlikely to limit business travel because of economic concerns: 24%
  - We are taking a wait-and-see approach but are not seriously considering limiting business travel because of economic concerns: 31%
  - We are considering limiting business travel because of economic concerns but have not made any decision yet: 19%
  - We are already implementing a plan to limit business travel because of economic concerns: 17%
  - Not sure: 10%
  
11. [BUYER/PROCUREMENT] What do you anticipate will be the top strategic priorities for your organization in the context of your business travel program for 2025? RANK ORDER
  - Cost management: 78%

- Traveler safety and security: 65%
- Productivity/ROI of travel: 49%
- Traveler experience/wellbeing: 42%
- Digital/technology transformation: 25%
- Expanding into new markets: 22%
- Sustainability: 19%

12. [BUYER/PROCUREMENT] As a travel buyer, what are the most significant challenges/barriers you are anticipating your organization's managed travel program will face in 2025? SELECT UP TO THREE.

- Rising travel costs/corporate budgets not keeping pace: 74%
- Employee travel program compliance: 40%
- C-Suite/executive travel program support: 14%
- Technology evolution: 40%
- Integrating/implementing more sustainable practices / options: 25%
- Travel disruption / risk mitigation: 37%
- Serving remote/hybrid model/business travelers: 9%
- Travelers' willingness to travel: 4%
- Travel program talent acquisition/retention: 10%
- Compliance with new environmental, social and governance (ESG) requirements (e.g., emissions disclosure: 23%
- Other: 2%

13. [BUYER/PROCUREMENT] In which area do you anticipate your organization will plan to increase investment to enhance business travel in 2025? RANK ORDER

- Safety and risk: 50%
- Technology and digitalization: 49%
- Consolidation of providers, e.g., TMCs or OBTs: 30%
- Partnerships and alliances: 29%
- Addition of TMCs, OBTs and other providers in new markets: 26%
- Training and development: 25%
- Traveler wellness, including allowing higher classes of service: 24%
- Compliance with new environmental, social and governance (ESG) requirements: 18%
- Sustainability solutions (e.g., data tracking, emissions optimization): 17%
- Sustainability initiatives/travel options: 16%
- Consulting services: 10%
- Purchase of Sustainable Aviation Fuel (SAF) certificates or other emissions compensation credits: 5%
- Other: 2%

14. Which technology-related challenges do you anticipate as the most significant in 2025 when it comes to your organization's business travel program? RANK ORDER

- Budget constraints: 60%
- Adoption and implementation of new industry-related technologies, including NDC: 56%
- Integration with existing systems: 55%

- Data security and privacy: 54%
- Artificial intelligence: 34%
- Emissions data display and tracking: 22%
- Lack of expertise: 18%

15. Which of the following statements best represents your current view of potential impact of artificial intelligence (AI) on the business travel industry SELECT ONE

- I'm excited, it will act as an innovation driver: 44%
- I'm wary but resigned that it's going to happen: 17%
- It's too early to say: 23%
- I'm very concerned due to ethics, privacy and/or other considerations: 10%
- I don't know/haven't thought about/considered it: 3%
- I'm unsure as I do not fully understand AI: 3%
- Other: 2%

16. [BUYER] Are you considering implementing artificial intelligence applications/tools in your corporate business travel program in 2025?

- We're already using AI in our travel program/strategy: 14%
- It's a top priority for 2025: 10%
- It's important but not a top priority for 2025: 34%
- It's currently low/ no priority: 26%
- Unsure, do not fully yet understand AI: 7%
- Don't know: 7%

17. [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: 5%
- We have started to implement NDC, and the transition has largely gone smoothly – but we have experienced a few challenges: 11%
- We have experienced some challenges when it comes to NDC implementation: 19%
- We have experienced many challenges when it comes to NDC implementation: 12%
- We have not started to implement NDC: 37%
- It's too early to say: 10%
- Not sure: 6%

18. [TMC, GDS, OR OB] 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: 22%
- We have experienced some challenges when it comes to NDC content distribution: 36%
- We have experienced many challenges when it comes to NDC content distribution: 16%
- We have largely not made NDC content available to corporate clients: 9%

- It is too early to say: 5%
- Not sure: 5%

19. [BUYER/SUPPLIER] How important is sustainability for your organization?

- High priority: 46%
- Medium priority: 37%
- Low priority: 16%
- Other: 1%

20. [BUYER] Have you integrated sustainability considerations into your travel program?

- Yes: 44%
- No: 26%
- No but we're planning to: 27%
- Don't know: 3%

21. [BUYER/SUPPLIER] What do you think are currently the main barriers for the travel industry in moving to a more sustainable future? RANK

- Higher costs: 75%
- Complexity of topic/taking action: 58%
- Lack of measurement and accounting standards for emissions: 35%
- Employees' pushback/dissatisfaction (e.g., longer travel times, loss of comfort): 30%
- Lack of data and access to transparent information: 22%
- Lack of financial incentives: 19%
- Competing priorities within travel departments: 18%
- Lack of executive support/buy-in: 14%
- Booking tools not displaying sustainability features: 11%
- Lack of clarity on environmental regulations: 10%
- Lack of interest from some industry stakeholders: 8%

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

- Accommodation and Food Services: 1%
- Arts, Entertainment, and Recreation: 2%
- Construction: 3%
- Consulting: 6%
- Educational Services: 1%
- Engineering: 7%
- Finance and Insurance: 10%
- Health Care, Pharmaceuticals and Social Assistance: 10%
- Manufacturing: 14%
- Media, Information, and Communications: 3%
- Mining, Oil and Gas Extraction and Utilities: 5%
- Non-profit, Association and Foundation: 5%
- Professional, Scientific and Technical: 3%

- Public Administration: 3%
- Retail / Wholesale Trade: 3%
- Software/Technology: 12%
- Telecommunications: 2%
- Transportation and Warehousing: 1%
- Travel and Meetings Management: 1%
- Other: 10%