



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA BUSINESS TRAVEL RECOVERY POLL RESULTS

October 6, 2022

Poll Results

1. Which of the following best describes you?

- Travel manager / buyer: 41%
- Procurement/sourcing professional: 8%
- Supplier: 33%
- TMC: 10%
- Other: 8%

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

- Hotel chain: 33%
- Travel management company: 24%
- Ground transportation: 6%
- Individual hotel property: 9%
- Travel technology/distribution company: 8%
- Airline: 8%
- Meetings management provider: 0%
- Payment company: 2%
- Consultant: 2%
- Other: 8%

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

- Accommodation and Food Services: 0%
- Arts, Entertainment, and Recreation: 1%
- Construction: 0%
- Consulting: 4%
- Educational Services: 2%
- Engineering: 2%
- Finance and Insurance: 11%
- Health Care, Pharmaceuticals and Social Assistance: 13%
- Manufacturing: 15%
- Media, Information, and Communications: 5%
- Mining, Oil and Gas Extraction and Utilities: 5%

- Non-profit, Association and Foundation: 6%
- Professional, Scientific and Technical: 6%
- Public Administration: 1%
- Retail / Wholesale Trade: 3%
- Software/Technology: 12%
- Telecommunications: 1%
- Transportation and Warehousing: 2%
- Travel and Meetings Management: 3%
- Other (please specify): 8%

4. Which of the following best describes your company’s current position on employees traveling for business?

| | Not allowed | Rarely allowed | Sometimes allowed | Usually allowed |
|---|-------------|----------------|-------------------|-----------------|
| Non-essential domestic business trips | 5% | 9% | 23% | 63% |
| Non-essential international business trips | 11% | 16% | 29% | 45% |

5. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company’s current **domestic** business travel bookings, 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: 1%
- 11-20% of our pre-pandemic bookings: 2%
- 21-30% of our pre-pandemic bookings: 8%
- 31-40% of our pre-pandemic bookings: 6%
- 41-50% of our pre-pandemic bookings: 10%
- 51-60% of our pre-pandemic bookings: 17%
- 61-70% of our pre-pandemic bookings: 14%
- 71-80% of our pre-pandemic bookings: 17%
- 81-90% of our pre-pandemic bookings: 8%
- 91-100% of our pre-pandemic bookings: 14%
- Not sure: 3%

6. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company's current **international** business travel bookings, 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: 50% of pre-pandemic bookings

- Less than 10% of our pre-pandemic bookings: 8%
- 11-20% of our pre-pandemic bookings: 8%
- 21-30% of our pre-pandemic bookings: 11%
- 31-40% of our pre-pandemic bookings: 10%
- 41-50% of our pre-pandemic bookings: 15%
- 51-60% of our pre-pandemic bookings: 11%
- 61-70% of our pre-pandemic bookings: 11%
- 71-80% of our pre-pandemic bookings: 9%
- 81-90% of our pre-pandemic bookings: 3%
- 91-100% of our pre-pandemic bookings: 10%
- Not sure: 4%

7. [DISPLAY IF BUYER/PROCUREMENT] What do you anticipate the volume of **internal** business travel such as travel to meet with colleagues or work at other company offices will be at your company in 2023 compared to 2022?

- There will likely be **more** internal travel in 2023 compared to 2022: 66%
- There will likely be the **same amount** of internal travel in 2023 compared to 2022: 25%
- There will likely be **less** internal travel in 2023 compared to 2022: 7%
- Not sure: 3%

8. [DISPLAY IF Q7= LESS INTERNAL TRAVEL] Thinking ahead to next year, which of the following do you think is most likely to reduce or limit the growth of internal employee business travel at your company?

- **COVID-19:** Employee unwillingness to travel because of COVID-19 or company policies limiting travel because of concern about the virus: 11%
- **Economic conditions:** High inflation or possibility of a recession; budget tightening or freezing: 67%
- Multiple reasons: 22%
- Other: 0%

- Not sure: 0%
- None of the above: 0%

Note: Small sample size (n=18); results cannot be extrapolated to general population of travel managers

9. [DISPLAY IF BUYER/PROCUREMENT] What do anticipate the volume of **non-internal business travel** such as sales meetings, travel to meet with clients or attend conferences and events will be at your company in 2023 compared to 2022

- There will likely be **more** non-internal travel in 2023 compared to 2022: 67%
- There will likely be the **same amount** of non-internal travel in 2023 compared to 2022: 23%
- There will likely be **less** non-internal travel in 2023 compared to 2022: 4%
- Not sure: 5%

10. [DISPLAY IF Q9 = LESS NON-INTERNAL TRAVEL] Thinking ahead to next year, which of the following do you think is most likely to reduce or limit the growth of non-internal employee business travel at your company?

- **COVID-19:** Employee unwillingness to travel because of COVID-19 or company policies limiting travel because of concern about the virus: 8%
- **Economic conditions:** High inflation or possibility of a recession; budget tightening or freezing: 83%
- Multiple reasons: 0%
- Other: 0%
- Not sure: 0%
- None of the above: 8%

Note: Small sample size (n=12); results cannot be extrapolated to general population of travel managers

11. [DISPLAY IF SUPPLIER/TMC] Thinking ahead to next year, which of the following do you think is more likely to reduce or limit the growth of business travel bookings with your company?

- **COVID-19:** Employee unwillingness to travel because of COVID-19 or company policies limiting travel because of concern about the virus: 4%
- **Economic conditions:** High inflation or possibility of a recession; budget tightening or freezing: 80%
- Other: 7%
- None of the above: 9%

12. [DISPLAY IF BUYER/PROCUREMENT] Which of the following best describes your expectations for next year (2023) for your company's business travel?

- We expect the number of business trips taken by employees will be **much higher** than it was this year: 17%
- We expect the number of business trips taken by employees will be **higher** than it was this year: 61%
- We expect the number of business trips taken by employees will be **similar** as it was this year: 18%
- We expect the number of business trips taken by employees will be **lower** than it was this year: 2%
- We expect the number of business trips taken by employees will be **much lower** than it was this year: 0%
- Other: 1%
- Not sure: 1%

13. [DISPLAY IF Q2=AIRLINE, HOTEL PROPERTY OR CHAIN, TMC, OR GROUND TRANSPORTATION COMPANY] Which of the following best describes your expectations for next year (2023)?

- We expect the number of bookings by corporate clients will be **much higher** than it was this year: 20%
- We expect the number of bookings by corporate clients will be **higher** than it was this year: 65%
- We expect the number of bookings by corporate clients will be **similar** as it was this year: 14%
- We expect the number of bookings by corporate clients will be **lower** than it was this year: 1%
- We expect the number of bookings by corporate clients will be **much lower** than it was this year: 0%
- Other: 0%

- Not sure: 1%

14. [DISPLAY IF Q2=AIRLINE, HOTEL PROPERTY OR CHAIN, TMC, OR GROUND TRANSPORTATION COMPANY] Which of the following best describes your expectations for next year (2023)?

- We expect business travel spending by corporate clients will be **much higher** than it was this year: 17%
- We expect business travel spending by corporate clients will be **higher** than it was this year: 63%
- We expect business travel spending by corporate clients will be **similar** as it was this year: 15%
- We expect business travel spending by corporate clients will be **lower** than it was this year: 5%
- We expect business travel spending by corporate clients will be **much lower** than it was this year: 0%
- Other: 0%
- Not sure: 0%

15. [DISPLAY IF BUYER/PROCUREMENT] Looking ahead to 2023, which of the following best describes your likely approach?

- We are unlikely to limit business travel because of economic concerns: 30%
- We are taking a wait-and-see approach but are not seriously considering limiting business travel because of economic concerns: 45%
- We are considering limiting business travel because of economic concerns but have not made any decision yet: 18%
- We are already implementing a plan to limit business travel because of economic concerns: 8%

16. [DISPLAY IF BUYER/PROCUREMENT] In 2022, as a travel manager has your responsibility for arranging team building events, offsite meetings and/or executive retreats changed versus 2019?

- I have more responsibility for arranging these types of meetings: 17%
- I have about the same level of responsibility for arranging these types of meetings: 27%
- I have less responsibility for arranging these types of meetings: 10%

- I never had/don't have the responsibility to arrange these types of meetings: 42%
- Don't know: 4%

17. [RESULTS FILTERED FOR BUYERS/PROCUREMENT] When planning or arranging team building events, offsite meetings and/or executive retreats, how do you prioritize the following? Please drag and drop so that 1 is your top priority and 7 is your least priority. **Note: Percentages shown are those who included the priority in their top three (out of seven possible)**

- Price: 70%
- Location/destination: 83%
- Amenities/activities: 21%
- Availability: 64%
- Sustainability options: 14%
- Executive preference: 45%
- Other: 3%

18. Which of the following best describes your company's current in-office/work-from-home (WFH) policy?

- **Full-time in-office:** Most employees are required or expected to report to the office most or all days: 12%
- **Hybrid:** Most employees are required or expected to work from the office some days – but are permitted to work from home other days: 68%
- **Full-time remote:** Employees are allowed or expected to work from home most or all days: 20%

19. [DISPLAY IF Q18=HYBRID OR FULL-TIME REMOTE] You mentioned your company allows hybrid or full-time remote work options. Thinking about your company, which of the following best describes its policy?

- Employees are allowed to work for an extended period of time outside the city, state, province or country where they are typically based: 22%
- Employees are allowed to work for an extended period of time outside the city, state or province where they are based, but must remain in the same country where they are typically based: 22%
- Employees are expected to work from the city, state, province or country where they are they are typically based: 45%
- Other: 5%
- Not sure: 6%

20. [DISPLAY IF Q18=HYBRID OR FULL-TIME REMOTE] You mentioned your company has a hybrid or remote work policy. Do you think this will result in more or less business travel?

- Flexibility to work from home will not impact the number of business trips taken by our employees: 72%
- Flexibility to work from home will result in employees taking more business trips: 14%
- Flexibility to work from home will result in employees taking fewer business trips: 14%

21. If your company has a hybrid work approach, is there a restriction on the amount of time an employee is allowed to work remote?

- No restrictions: 51%
- Less than a month: 10%
- 1 month: 2%
- 2-6 months: 3%
- 6-12 months: 2%
- Don't know: 17%
- Not applicable as our company allows fully remote working: 15%

22. [DISPLAY IF Q18=HYBRID OR FULL-TIME REMOTE] Does your company reimburse employees for any costs or expenses incurred while they are working remotely?

- Yes: 27%
- No: 42%
- It depends on their manager's discretion: 25%
- Don't know: 6%

23. Does your company reimburse employees for anything beyond the business trip's initial inbound and outbound transportation costs when an employee extends a trip for leisure (air/train, hotel, car, meals), also known as blended or bleisure travel?

- Yes: 4%
- No – we fully reimburse the cost of transportation (i.e., flights to and from the business destination), but we do not reimburse for any costs as a result of the leisure component of the trip: 78%
- No – and we do not automatically reimburse the cost of transportation (i.e., flights) if an employee extends a business trip for leisure: 10%
- It depends on their manager's discretion: 8%

24. [RESULTS FILTERED FOR BUYERS/PROCUREMENT] Have you seen an increase in employees asking for blended travel/bleisure considerations?

- Yes: 41%
- No: 42%
- Don't know: 17%

25. [DISPLAY IF Q2=BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 44%
- Somewhat willing: 42%
- Neither willing nor unwilling: 11%
- Not willing: 1%
- Not willing at all: 0%
- Not sure: 3%

26. Thinking about your company, how has the coronavirus impacted business travel to...? [MATRIX: WE HAVE CANCELED OR SUSPENDED ALL TRIPS, WE HAVE CANCELED OR SUSPENDED MOST TRIPS, WE HAVE CANCELED OR SUSPENDED SOME TRIPS, WE HAVE CANCELED OR SUSPENDED A FEW TRIPS, WE HAVE NOT CANCELED OR SUSPENDED ANY TRIPS]

- a. All international travel
- b. All domestic travel
- c. All travel, domestic and international

| | Cancelled All Trips | Cancelled Most Trips | Cancelled Some Trips | Cancelled a Few Trips | Cancelled No Trips |
|--|---------------------|----------------------|----------------------|-----------------------|--------------------|
| All International | 9% | 23% | 20% | 24% | 23% |
| All Domestic Travel | 4% | 10% | 18% | 25% | 42% |
| All Travel (Domestic and International) | 4% | 13% | 27% | 28% | 28% |

27. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

| Region/Country | Plan to Resume Travel in Near Future (1-3 months) | Considering Resuming Travel in Near future, but No Definite Plans | Do Not Plan to Resume Travel in Near Future | Not Sure |
|--------------------------|---|---|---|----------|
| All International Travel | 44% | 38% | 9% | 9% |
| All Domestic Travel | 69% | 18% | 5% | 7% |
| All Travel | 60% | 28% | 6% | 6% |

28. [DISPLAY IF SUPPLIER/TMC] How do you currently feel about the business travel industry’s path to recovery?

- Very optimistic: 27%
- Optimistic: 50%
- Neither optimistic nor pessimistic: 15%
- Pessimistic: 6%
- Very pessimistic: 0%

29. [DISPLAY IF Q2=AIRLINE, HOTEL PROPERTY OR CHAIN, TMC, OR GROUND TRANSPORTATION] You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past month?

- Our bookings have increased: 79%
- Our bookings have remained the same: 15%
- Our bookings have decreased: 6%