

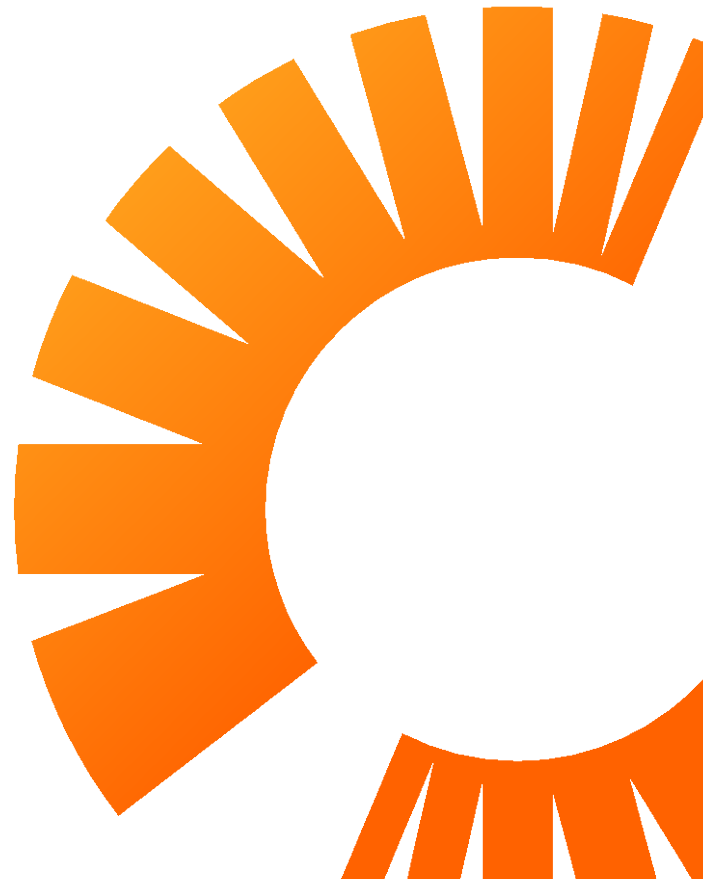


GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA BUSINESS TRAVEL OUTLOOK POLL RESULTS

October 30, 2023



Poll Results (reflects all respondents across all regions)

1. Which of the following best describes you?
 - Travel manager / buyer: 39%
 - Procurement/sourcing professional: 8%
 - Supplier: 34%
 - TMC: 11%
 - Other: 8%

2. [SUPPLIER/TMC] Which of the following best describes the company you work for?
 - Hotel chain: 32%
 - Travel management company: 22%
 - Ground transportation: 6%
 - Individual hotel property: 9%
 - Travel technology: 8%
 - Airline: 9%
 - Meetings management provider: 1%
 - Payment company: 1%
 - Consultant: 3%
 - Global distribution system (GDS): 1%
 - Other: 8%

3. How would you rate the current state of your company's business travel recovery in 2023 (compared to 2019 levels)?
 - 9-10: Largely recovered/Fully recovered: 43%
 - 7-8: Mostly recovered: 41%
 - 4-6: Partially recovered: 14%
 - 1-3: Not recovered: 1%

4. What do you perceive as the most significant barriers faced by business travel in 2023? Please select all that apply.
 - Corporate budgets not keeping pace with rising costs of travel: 69%
 - Inflation/recession concerns: 63%
 - Geo-political events: 44%
 - Travel disruptions: 38%
 - Workforce hiring/retention: 28%
 - Climate impact concerns: 22%
 - Travel confidence/willingness to travel: 15%
 - Pandemic concerns: 6%
 - None of the above: 1%
 - Other: 7%

5. To what degree have you seen the following new patterns or preferences emerge over the past year among your company’s business travelers?

	We are seeing somewhat less/ A lot less	We are seeing the same amount	We are seeing somewhat more/A lot more
Employees attending meetings and conferences in person	19%	21%	60%
“Blended” travel (employees extending work trips for leisure, or vice versa)	8%	36%	56%
“Linked” business trips (i.e., employees visiting two or more locations — or conducting two or more separate business meetings — on the same trip)	6%	40%	55%
Employees holding virtual meetings	18%	31%	51%
Employees want to travel more	18%	37%	45%
Employees taking direct flights	6%	54%	40%
Longer duration of business trips	14%	45%	40%
Longer business trips	18%	44%	38%
Multimodal trips (i.e., employees using multiple modes of transportation such as planes and trains—or taxis and bicycles--on the same trip)	7%	56%	36%
Employees bringing family members to accompany them on business trips	17%	52%	31%
Employees want to travel less	30%	46%	24%
Luxury/premium/first-class business travel	29%	49%	22%
Employees taking connecting flights	23%	59%	18%
Private aviation usage in my company	26%	59%	15%

6. To what extent did experiencing travel delays and disruptions in prior months affect the willingness of the following types of employees at your organization to travel for work? Your best estimate is fine?

	Greatly impacted	Somewhat impacted	Slightly impacted	Not impacted	Not sure
Non-executive employees	11%	29%	24%	24%	11%
Executive employees	10%	28%	23%	27%	12%

7. [DISPLAY IF BUYER/PROCUREMENT] How does your company's 2024 travel budget compare (or is likely to compare) to the 2023 travel budget?
- Significantly higher than 2023 budget (increase of 25%+): 5%
 - Higher than 2023 budget: 39%
 - About the same: 28%
 - Lower than 2023 budget: 18%
 - Significantly lower than 2023 budget (decrease of 25%+): 2%
 - Don't know: 8%
8. [DISPLAY IF BUYER/PROCUREMENT] Looking ahead to 2024 in terms of economic considerations, which of the following best describes your likely approach?
- Unlikely to limit business travel because of economic concerns: 25%
 - Taking a wait-and-see approach but are not seriously considering limiting business travel because of economic concerns: 32%
 - Considering limiting business travel because of economic concerns but have not made any decision yet: 25%
 - Already implementing a plan to limit business travel because of economic concerns: 14%
 - Don't know: 4%
9. What do you anticipate will be the top strategic priorities for your organization in the context of your business travel program for 2024? Please select up to three.
- Cost management: 62%
 - Productivity/ROI of travel: 46%
 - Traveler safety and security: 44%
 - Sustainability: 37%
 - Traveler experience/wellbeing: 37%
 - Digital transformation: 21%
 - Expanding into new markets: 20%
 - Other, please specify: 3%
10. Thinking about travel program related expenses such as travel manager salaries, consultants, travel management company (TMC) fees, technology and other expenses needed to manage the travel program, how does your company's 2024 budget compare to 2023?
- Increase significantly (more than 10%): 10%
 - Increase moderately (1% - 10%): 38%
 - Remain the same: 30%
 - Decrease moderately (1% - 10% decrease): 7%
 - Decrease significantly (more than 10%): 2%
 - Don't know: 14%

11. In which areas do you anticipate your organization will plan to increase investment to enhance business travel in 2024?

- Technology and digitalization: 63%
- Sustainability initiatives: 45%
- Partnerships and alliances: 40%
- Safety and risk: 34%
- Training and development: 34%
- Wellness, including allowing higher classes of service: 12%
- Other, please specify: 3%
- None of the above: 7%

12. Which technology-related challenges do you anticipate as the most significant in 2024 when it comes to your organization’s business travel program? Please select up to two.

- Adoption and implementation of new industry-related technologies, including NDC: 46%
- Budget constraints: 38%
- Integration with existing systems: 32%
- Artificial intelligence (AI): 24%
- Data security and privacy: 22%
- Lack of expertise: 7%
- Other: 1%
- Don’t know: 6%

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

- Excited: Innovation driver: 32%
- Necessary evil, it’s going to happen: 14%
- Too early to say: 33%
- Don’t know/haven’t thought about/considered it: 5%
- I’m very concerned due to ethics, privacy and/or other considerations: 10%
- Unsure, do not fully understand AI: 4%

14. [DISPLAY IF BUYER/PROCUREMENT] Are you considering implementing artificial intelligence (AI) applications/tools in your corporate business travel program in 2024?

- Already using AI in our travel program/strategy: 6%
- It’s a top priority for 2024: 7%
- It’s important but not a top priority for 2024: 34%
- It’s currently low/No priority : 37%
- Unsure, do not fully understand AI: 7%
- Don’t know: 9%

15. How frequently do you use ChatGPT or another generative AI tool in your own role/work?

- I've never used ChatGPT or another generative AI tool for work: 42%
- Rarely: 33%
- Monthly: 11%
- Weekly: 10%
- Daily: 4%

16. Which business travel risk mitigation strategy do you anticipate will be most prioritized in your organization in 2024?

- Connecting NDC distribution channels to our traditional channels so travelers can be cared for before, during and after their trips: 22%
- Enhancing traveler training and communication: 18%
- Addressing non-compliant bookings (outside of our preferred channels): 18%
- Enhancing crisis management and response capabilities: 10%
- Implementing robust health and safety protocols: 4%
- Investing in comprehensive insurance coverage: 2%
- Implementing stricter vendor and partner assessments: 8%
- Other, please specify: 1%
- Don't know: 17%

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

- Full-time in-office: Most employees are required or expected to report to the office most or all days: 15%
- 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: 16%
- Don't know: 1%

18. In your organization, how do you foresee the balance between virtual and in-person meetings and events in 2024? Exclude regularly, day-to-day Zoom / Teams video calls when considering your answer.

- Predominantly in-person: 14%
- More in-person than virtual: 23%
- An equal mix of in-person and virtual: 39%
- Predominantly virtual: 21%
- More virtual than in-person: 3%

19. [DISPLAY IF BUYER/PROCUREMENT] In general, do you feel you need more information or education about New Distribution Capability (NDC) / airline retailing / distribution?

- Yes: 71%
- No: 22%
- Not sure: 7%

20. [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: 46%
- Not sure: 23%

21. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your travel program's implementation of NDC, which statement best represents your experience?

- Started to implement NDC - have not experienced any challenges/transition largely gone smoothly: 10%
- Started to implement NDC – have experienced some/many challenges: 22%
- Have not started to implement NDC: 50%
- Too early to say: 11%
- Not sure: 6%

22. [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: 5%
- 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: 23%
- We have experienced some challenges when it comes to NDC content distribution: 20%
- We have experienced many challenges when it comes to NDC content distribution: 27%
- We have largely not made NDC content available to corporate clients: 12%
- It is too early to say: 11%
- Not sure: 3%

23. Thinking about the overall roll-out of NDC in the industry, which of the following best describes your view?

- Airlines are moving too fast: 45%
- Intermediaries should be ready: 36%
- Don't know/Not sure: 16%
- Other (please specify): 3%

24. [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: 76% of pre-pandemic bookings

- Less than 10% of our pre-pandemic bookings: 2%
- 11-20% of our pre-pandemic bookings: 3%
- 21-30% of our pre-pandemic bookings: 2%
- 31-40% of our pre-pandemic bookings: 4%
- 41-50% of our pre-pandemic bookings: 3%
- 51-60% of our pre-pandemic bookings: 5%
- 61-70% of our pre-pandemic bookings: 10%
- 71-80% of our pre-pandemic bookings: 12%
- 81-90% of our pre-pandemic bookings: 16%
- 91-100% of our pre-pandemic bookings: 20%
- We have already exceeded our pre-pandemic domestic bookings: 5%
- Not sure: 5%
- We have already exceeded our pre-pandemic domestic bookings: 17%

25. [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: 70% of pre-pandemic bookings

- Less than 10% of our pre-pandemic bookings: 4%
- 11-20% of our pre-pandemic bookings: 3%
- 21-30% of our pre-pandemic bookings: 3%
- 31-40% of our pre-pandemic bookings: 5%
- 41-50% of our pre-pandemic bookings: 5%
- 51-60% of our pre-pandemic bookings: 7%
- 61-70% of our pre-pandemic bookings: 10%
- 71-80% of our pre-pandemic bookings: 13%
- 81-90% of our pre-pandemic bookings: 13%
- 91-100% of our pre-pandemic bookings: 13%
- We have already exceeded our pre-pandemic international bookings: 15%
- Not sure: 8%

26. [BUYER/PROCUREMENT] Thinking about your company's current **domestic business travel spend**, 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: 77% of pre-pandemic spend

- Less than 10% of our pre-pandemic spend: 2%
- 11-20% of our pre-pandemic spend: 2%
- 21-30% of our pre-pandemic spend: 3%

- 31-40% of our pre-pandemic spend: 2%
- 41-50% of our pre-pandemic spend: 5%
- 51-60% of our pre-pandemic spend: 7%
- 61-70% of our pre-pandemic spend: 6%
- 71-80% of our pre-pandemic spend: 10%
- 81-90% of our pre-pandemic spend: 13%
- 91-100% of our pre-pandemic spend: 20%
- We have already exceeded our pre-pandemic domestic spend: 23%
- Not sure: 7%

27. [BUYER/PROCUREMENT] Thinking about your company's current **international business travel spend**, 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: 2%
- 11-20% of our pre-pandemic spend: 3%
- 21-30% of our pre-pandemic spend: 5%
- 31-40% of our pre-pandemic spend: 4%
- 41-50% of our pre-pandemic spend: 6%
- 51-60% of our pre-pandemic spend: 7%
- 61-70% of our pre-pandemic spend: 6%
- 71-80% of our pre-pandemic spend: 9%
- 81-90% of our pre-pandemic spend: 12%
- 91-100% of our pre-pandemic spend: 14%
- We have already exceeded our pre-pandemic domestic spend: 24%
- Not sure: 9%

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

- | | |
|--|--|
| • Accommodation & Food Services: 2% | • Mining, Oil and Gas Extraction & Utilities: 6% |
| • Arts, Entertainment, & Recreation: 0% | • Non-profit, Association & Foundation: 5% |
| • Construction: 3% | • Professional, Scientific, and Technical: 4% |
| • Consulting: 8% | • Public Administration: 1% |
| • Educational Services: 2% | • Retail / Wholesale Trade: 4% |
| • Engineering: 3% | • Software/Technology: 11% |
| • Finance and Insurance: 3% | • Telecommunications: 1% |
| • Health Care, Pharmaceuticals and Social Assistance: 9% | • Transportation and Warehousing: 1% |
| • Manufacturing: 18% | • Travel and Meetings Management: 2% |
| • Media, Information, and Communications: 4% | • Other (please specify): 8% |