



GBTA Global Business
Travel Association

Many Voices. One Purpose.

37TH GBTA BUSINESS TRAVEL INDUSTRY SENTIMENT POLL

GBTA Business Travel Outlook Poll

October 30, 2025



Methodology

An online poll was conducted of GBTA members and non-members worldwide, including corporate travel managers, travel suppliers, and intermediaries

- Data collection from October 2 through October 14, 2025
- An email invitation was sent to 17,526 business travel professionals including current and inactive members of GBTA
- In total, 591 business travel professionals responded
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number





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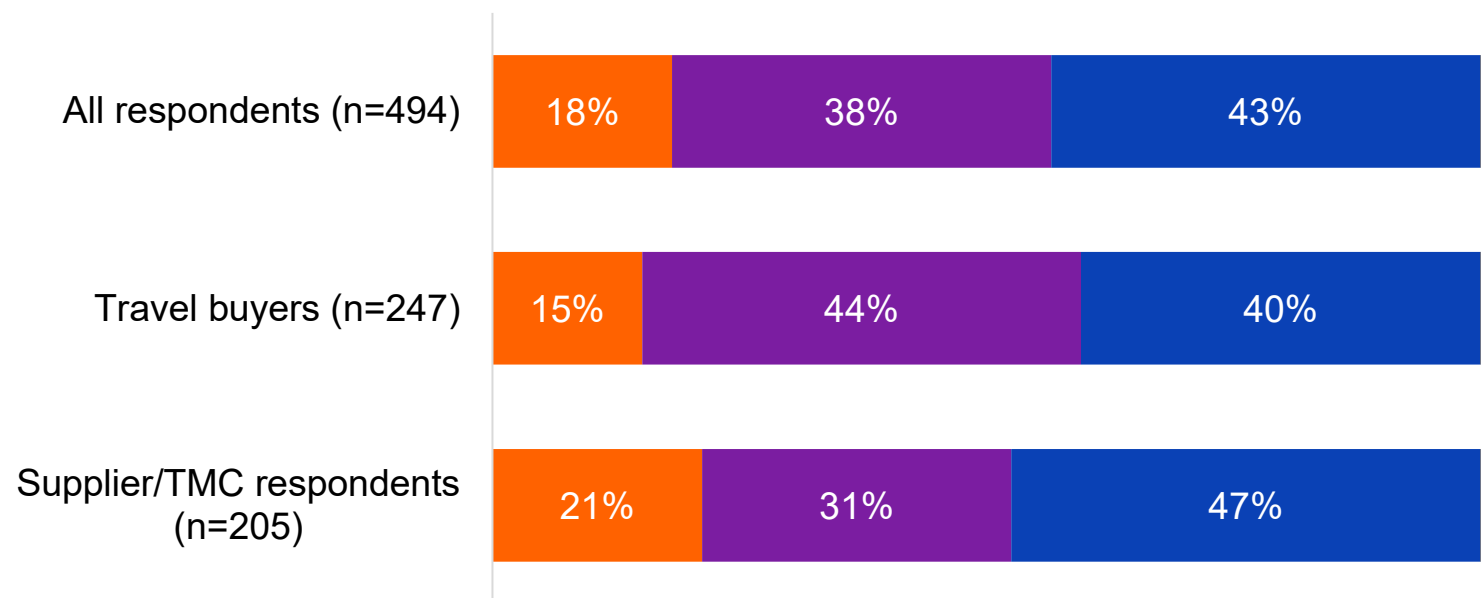
What is the Current Impact of U.S. Government Actions on the Global Business Travel Industry?



Business Travel Optimism Rebounds

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

■ Pessimistic/Very Pessimistic ■ Neither optimistic nor pessimistic ■ Optimistic/Very Optimistic ■ Don't know



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

Industry optimism returns.

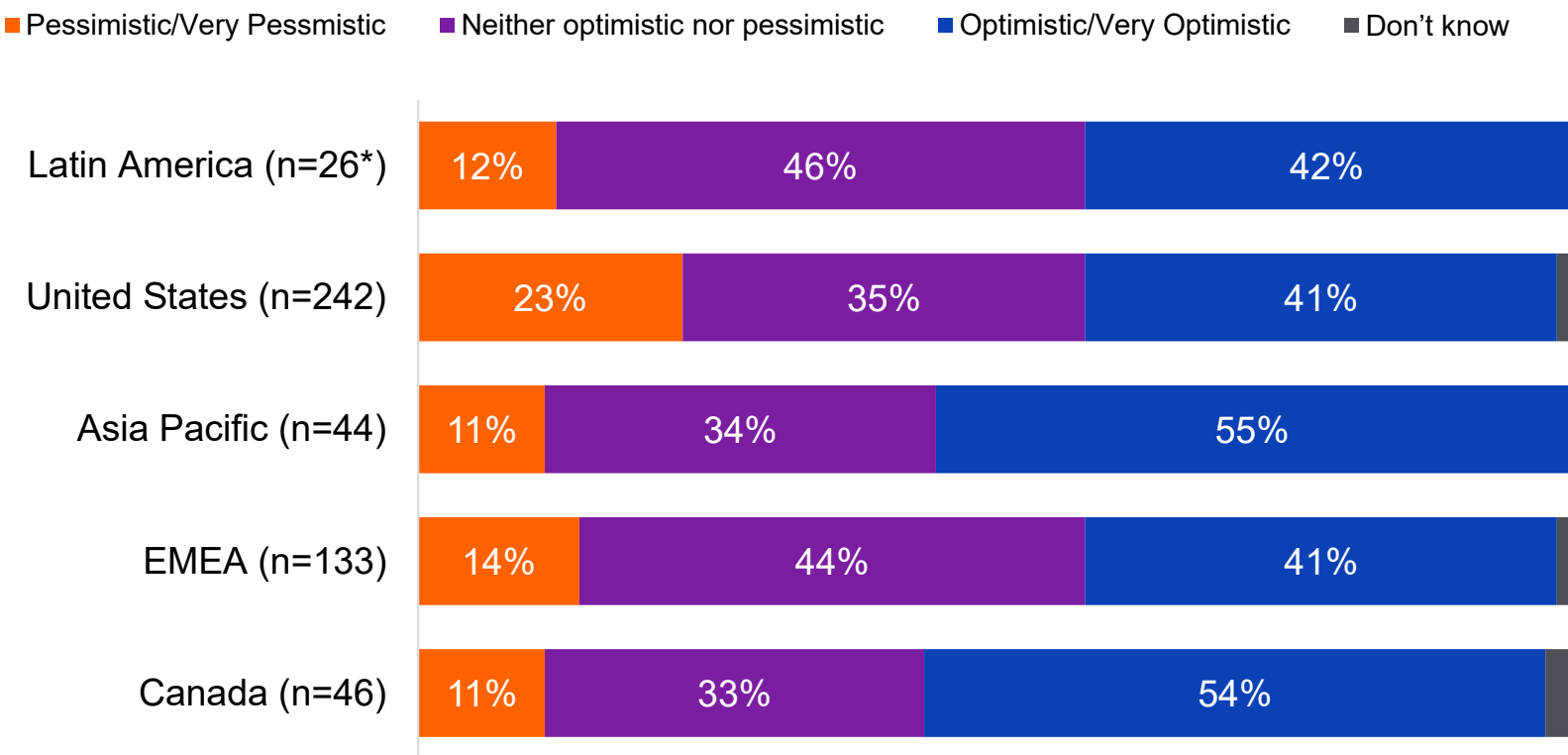
More than two in five business travel professionals (43%) are optimistic about the industry outlook for the remainder of the year.

This represents a solid improvement from June (28%).

Suppliers and TMC professionals (47%) are more optimistic than buyers (40%).

Regional View: Optimism Varies Across the World

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



Q. Thinking about the remainder of 2025, how do you feel about the overall outlook for the business travel industry? *Note: Mexico is grouped with Latin America for purposes of this poll.*
**indicates small sample size*



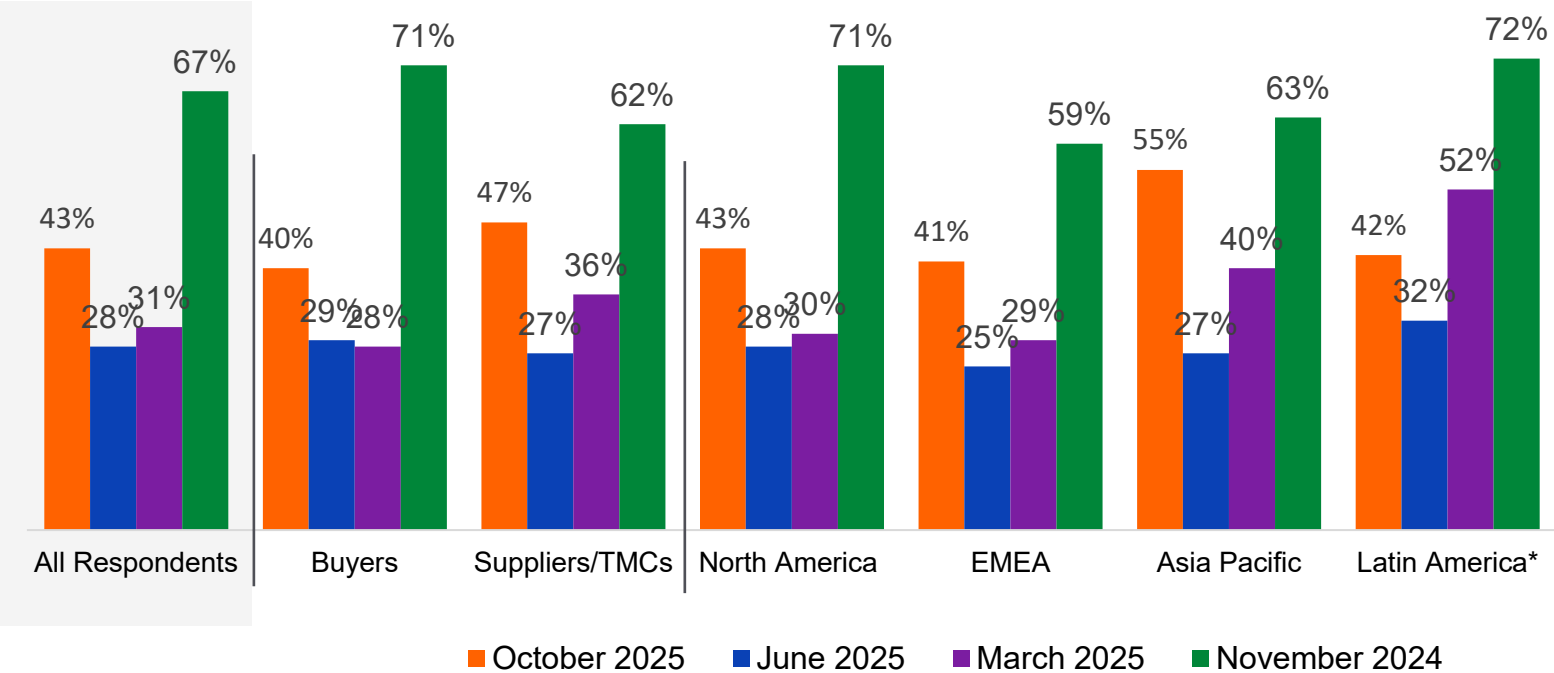
Half of Canada-based business travel professionals (54%) are optimistic about the industry outlook for the remainder of the year. This is up from 23% who said the same in June.

U.S. tariffs threaten to hit Canada especially hard. However, the Canadian economy has remained resilient – avoiding recession and posting solid growth. Trade negotiations continue.

As a result, Canadian optimism has returned.

Industry Optimism: Outlook Over a Year

Business Travel Optimism: November Through June
% “optimistic” + “very optimistic”



Q (Polls fielded: June & March). Thinking about the remainder of 2025, how do you feel about the overall outlook for the business travel industry?
Q (November). Thinking about the year ahead, how do you feel about the outlook overall for the business travel industry?

*Note: Mexico is grouped with Latin America for purposes of this poll.
indicates small sample size for Latin America-based respondents (n<30)



Across the world, business travel optimism rebounds.

Two in five business travel professionals (43%) are optimistic about the industry outlook for the remainder of the year. This represents solid improvement from June (28%).

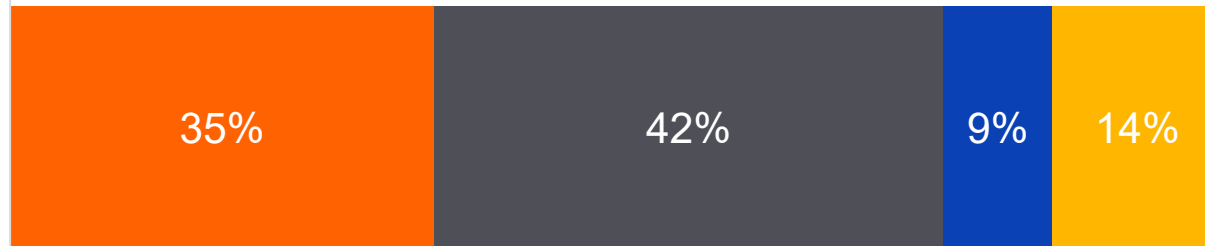
Growing optimism is seen around the world.

Nonetheless, optimism remains considerably lower than it was one year ago.

Government Actions Can Hurt Business Travel

How will your company's business travel volume change as a result of recent U.S. government actions?
(travel buyers only)

■ Decrease ■ Won't change/be impacted ■ Increase ■ Don't know/Not applicable



Q. 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? (n=245)

Note: An earlier version of this report contained an error. Incorrect percentages were reported for the share who indicated "increase" and "won't change." This error was discovered and corrected on November 7, 2025

Even as optimism rebounds, government policies weigh on business travel.

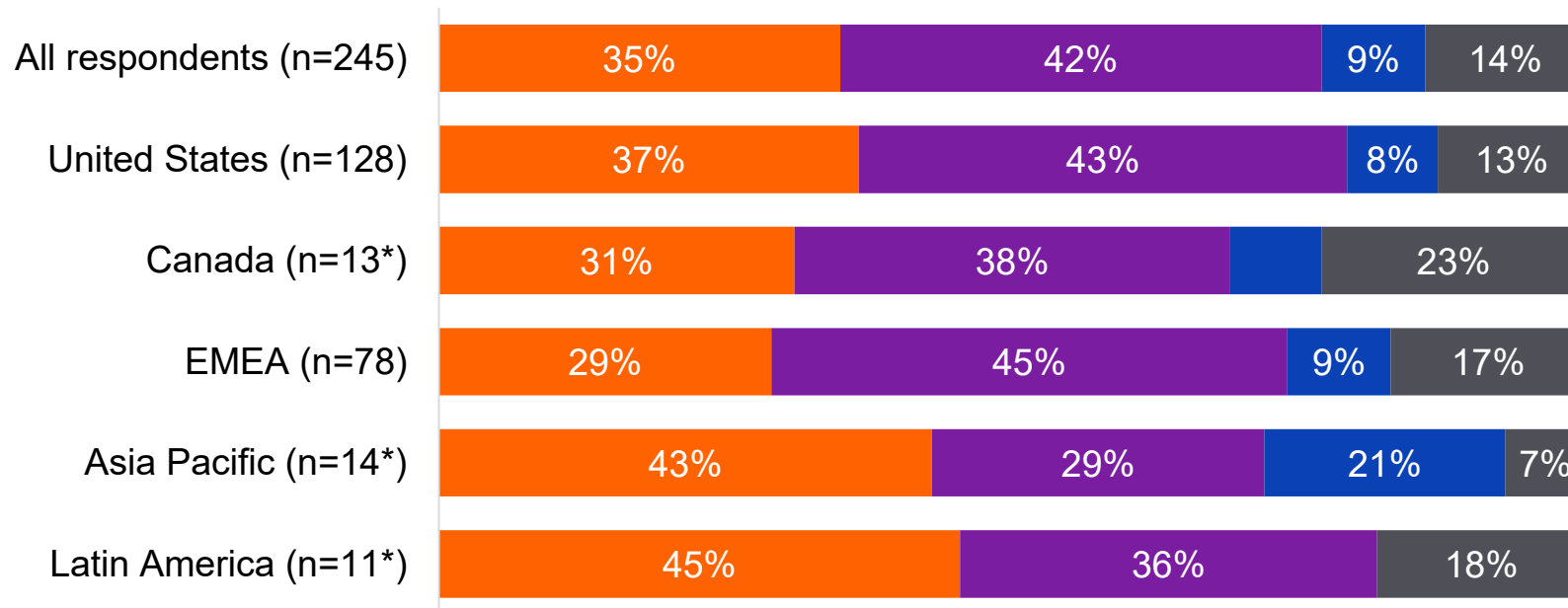
One-third of buyers worldwide (35%) expect their company's business travel volume will decline as a result of U.S. government actions.

The **Travel Buyer's** Perspective: Volume

Are Volume Impacts Less Likely in EMEA?

How will your company's business travel volume change as a result of recent U.S. government actions?
(travel buyers only)

Decrease Won't change/Be impacted Increase Don't know/Not applicable



Q. 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?

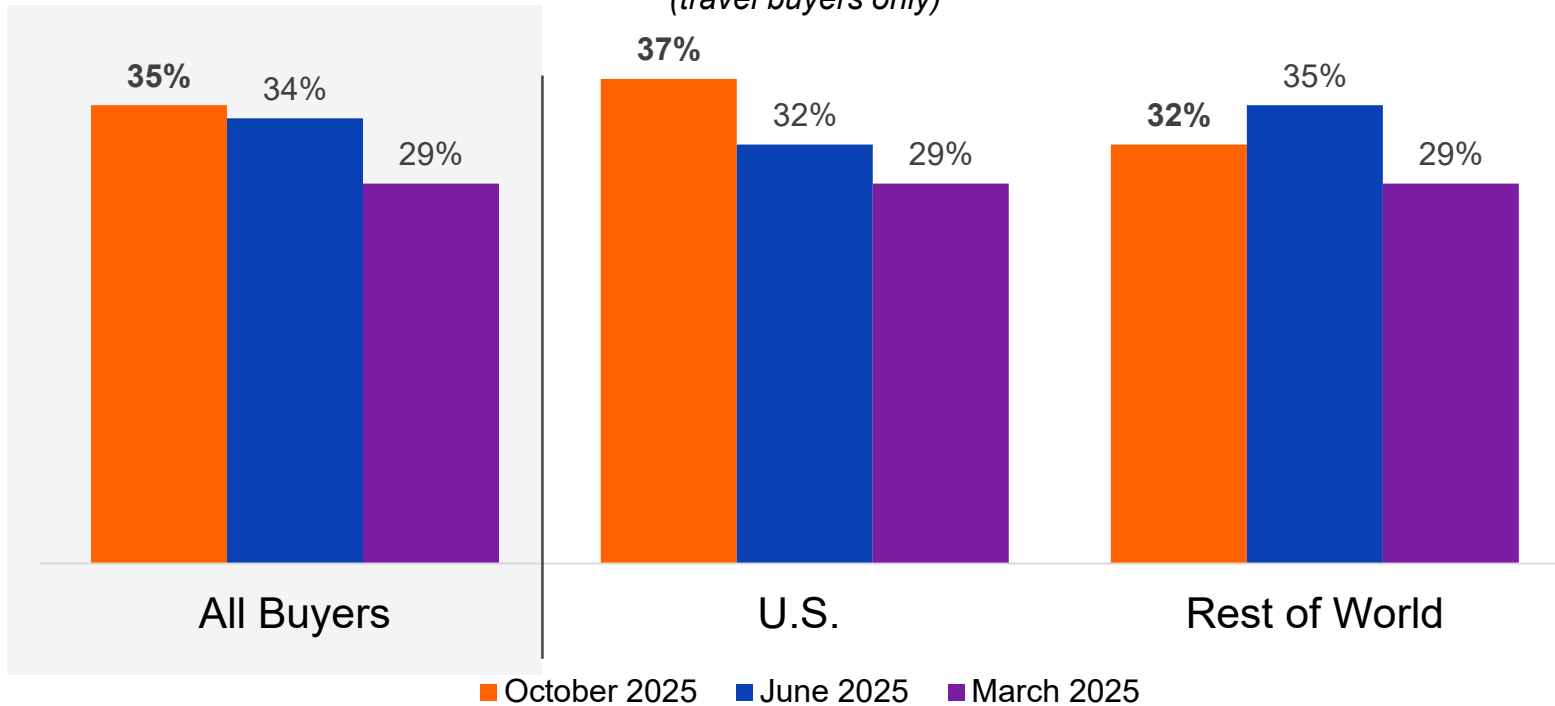
*indicates small sample size (n<30)

EMEA-based buyers are less likely than those in other regions to expect a business travel volume decline as a result of U.S. government actions.

The **Travel Buyer's** Perspective: Volume

Expected Business Travel Volume Declines Across 7-Month Period

Business Volume Expectations
% of buyers who expect a decrease at their company
(travel buyers only)



Q. 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? –Our business travel volume will decrease by approximately

Volume expectations remain largely unchanged.

While industry optimism rebounds, it is not clear that this will actually translate to more business travel.

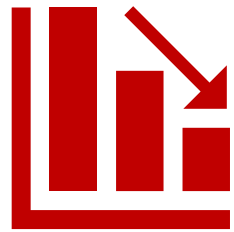
The percentage of buyers who expect a volume decline as a result of U.S. government actions has not changed since June.

The **Travel Buyer's** Perspective: Volume

Where Negative Impacts Expected, Travel VOLUME Declines Still Expected to Be Significant

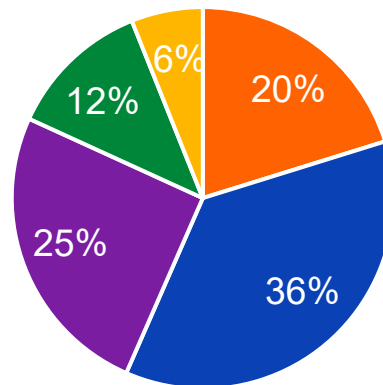
How much will business travel volume decline at your company as a result of recent U.S. government actions?

(average among travel buyers who expect a decline)



19%*

**This average is calculated from buyers who expect their company's business travel volume will decline this year.*



- Less than 10%
- 10% to less than 20%
- 20% to less than 30%
- 30% to less than 50%
- 50% or more

Travel buyers who expect a volume decline at their company expect a decrease of 19%, on average.

The **Travel Buyer's** Perspective: Volume

U.S. Government Actions Can Hurt Business Travel Worldwide

How will your company's business travel volume change as a result of recent U.S. government actions?
(travel buyers only)

■ Decrease

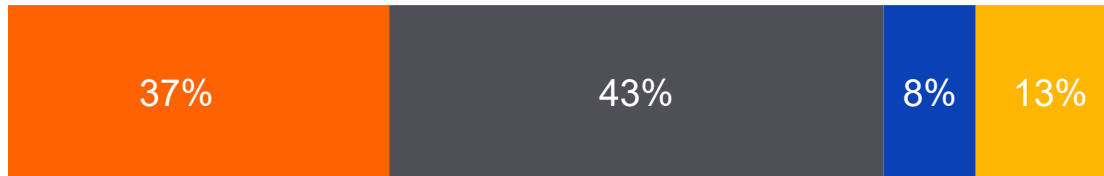
■ Won't change/be impacted

■ Increase

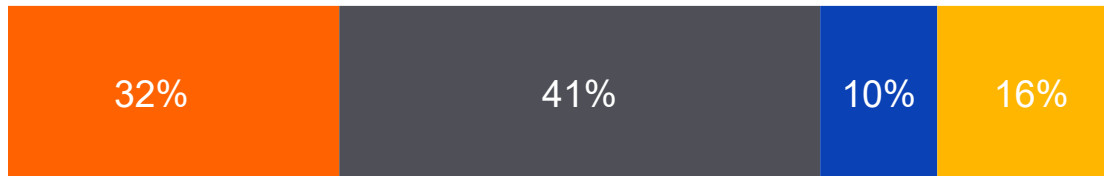
■ Don't know/Not applicable



United States
(n=128)



Rest of World
(n=117)



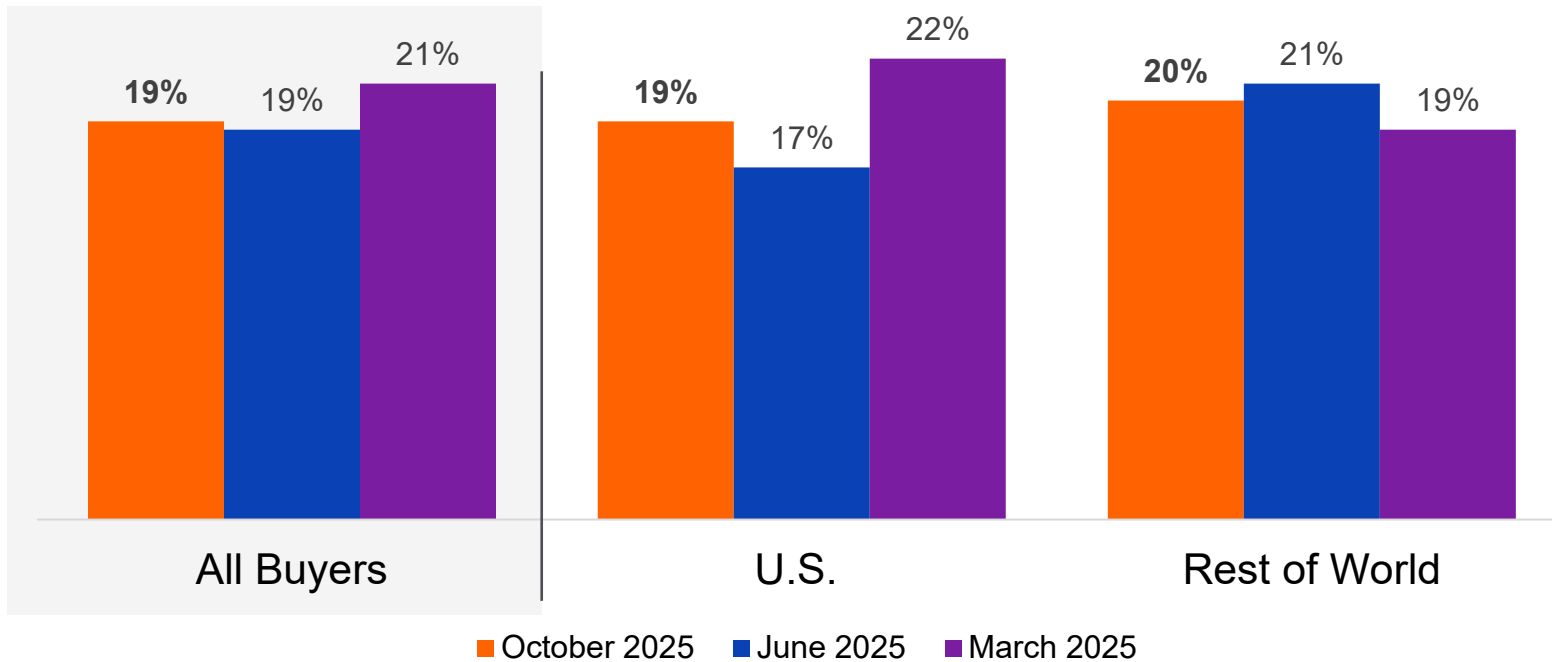
Q . Thinking about 2025 as a whole, how do you think your organization's business travel volume (i.e., number of trips taken) will be impacted as a result of U.S. government announcements/actions?

Similar proportions of buyers within (37%) and outside (32%) the U.S. expect their companies' business travel volume will decline as a result of U.S. government actions.

The **Travel Buyer's** Perspective: Volume

Expected Business Travel Volume: March Through October

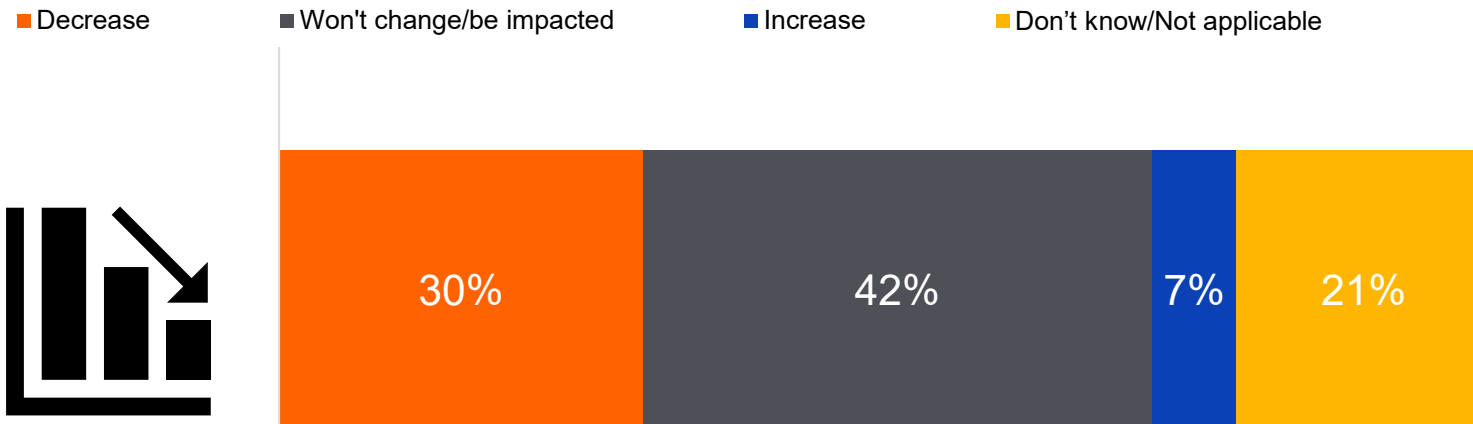
Business Volume Declines
(expected volume decline among buyers that expect a decrease)



The average expected volume decline (19%) is identical to what it was in June.

U.S. Government Actions Can Hurt Business Travel Spending

How will your company's business travel spend change as a result of recent U.S. government actions?
(travel buyers only)



Q. 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. (n=243)

Business travel spend is expected to decline in concert with volume.

In addition to *business travel volume*, the poll also asked about *spending*.

One-third of buyers (30%) expect their company's business travel spend will decline as a result of U.S. government actions.

The **Travel Buyer's** Perspective: Spending

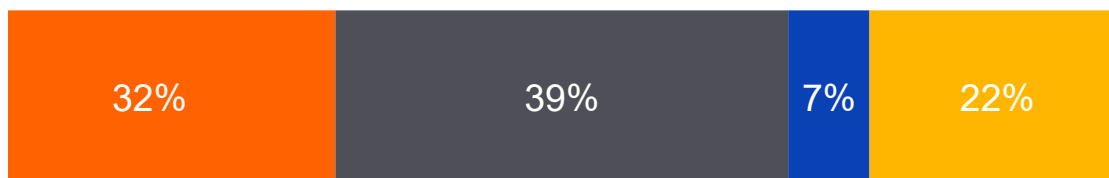
Spend Impacts Are Not Confined to the U.S.

How will your company's business travel spend change as a result of recent U.S. government actions?
(travel buyers only)

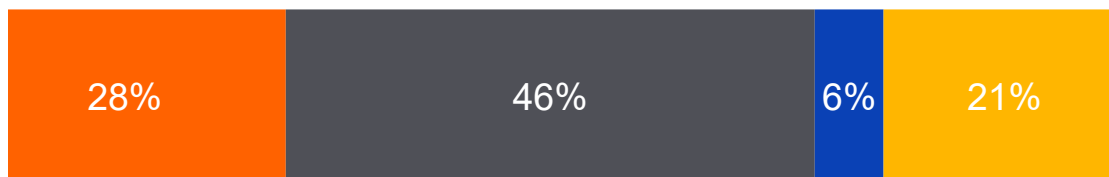
■ Decrease ■ Won't change/be impacted ■ Increase ■ Don't know/Not applicable



United States
(n=127)



Rest of World
(n=116)



Q. 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.

Spend impacts are expected in the U.S. and abroad.

A similar number of U.S. (32%) and non-U.S. (28%) buyers expect their company's business travel spend will decline as a result of U.S. government actions.

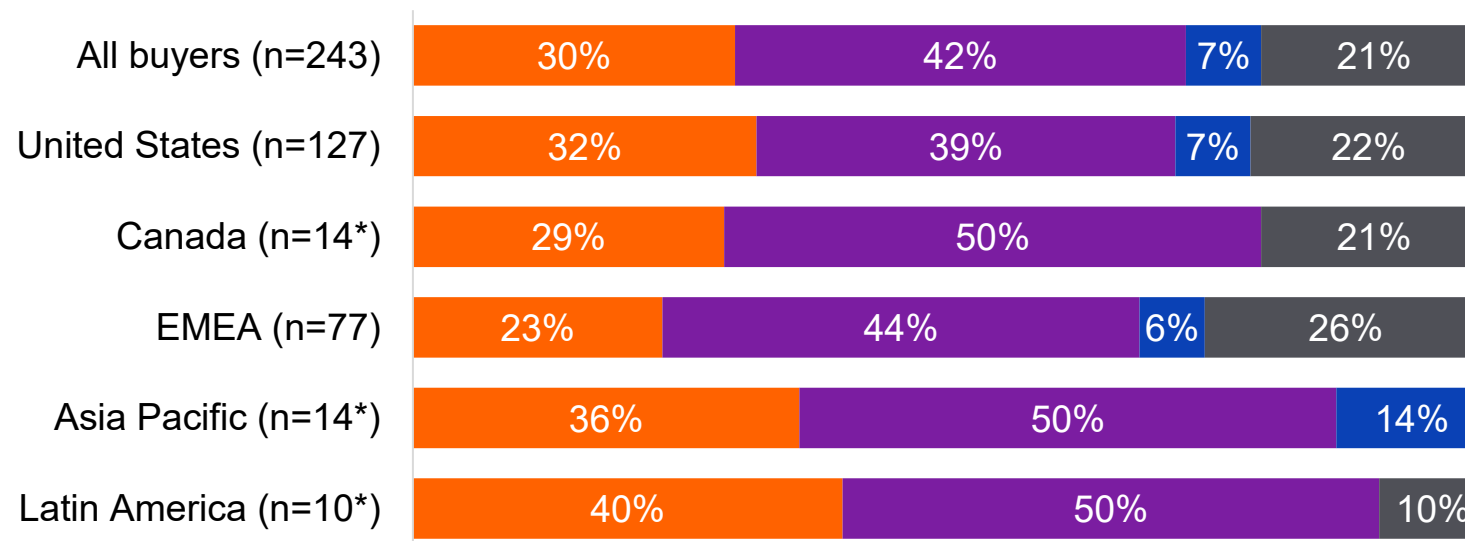
The **Travel Buyer's** Perspective: Spending

EMEA Buyers Are Least Likely to Expect a Spend Decline

How will your company's business travel spend change as a result of recent U.S. government actions?

(travel buyers only)

■ Decrease ■ Won't change/Be impacted ■ Increase ■ Don't know/Not applicable



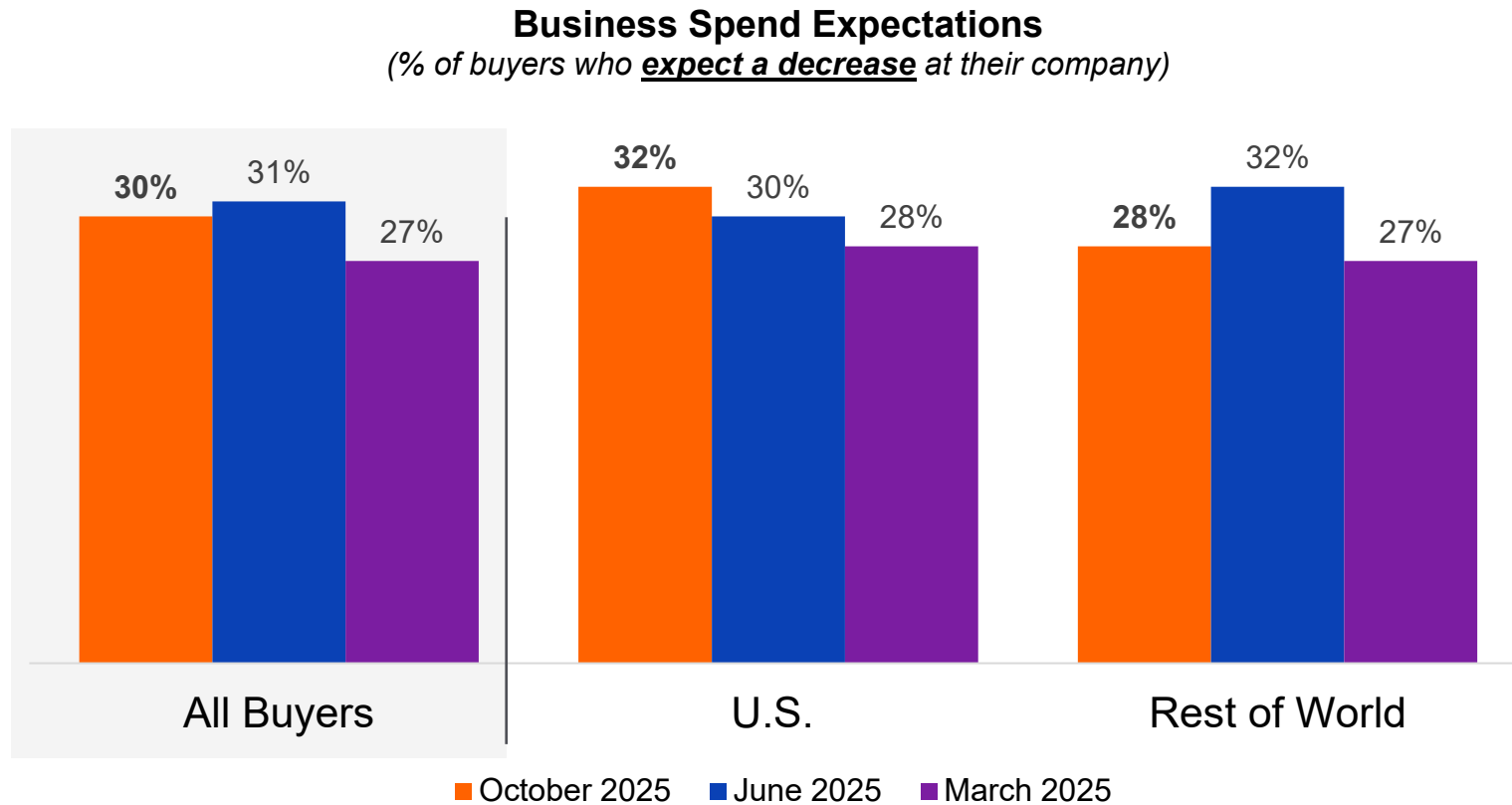
Q. Thinking about 2025 as a whole, how do you think your organization's business travel spending will be impacted as a result of U.S. government announcements/actions? Estimates are fine.

*indicates small sample size (n<30).

EMEA buyers are least likely to expect a spend decline as a result of U.S. government actions.

The **Travel Buyer's** Perspective: Spending

Expected Business Travel Spend Declines: March Through October



Spend expectations remain consistent from June.

The **Travel Buyer's** Perspective: Spending

Similar Spend Declines Are Expected Within and Outside the U.S.

How much will business travel spend decline as a result of recent U.S. government actions?

(average among travel buyers who expect a decline)



United States
(n=41)



19%



Rest of World
(n=31)



20%

Similar spending declines are expected within and outside the U.S.

Q. 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? Note: Question only displayed to travel buyers/procurement professionals

Travel Supplier/Intermediary's Perspective: Revenue

A Large Number of Suppliers and Intermediaries Expect a Negative Impact on Revenue

How will your company's revenue change as a result of recent U.S. government actions?

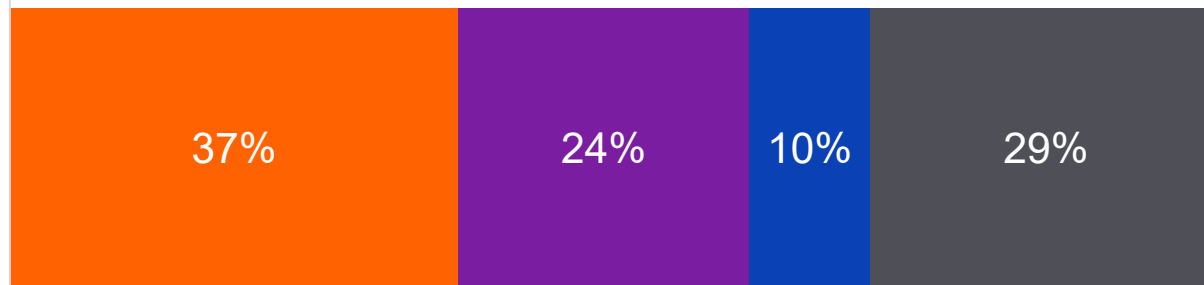
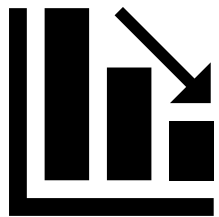
Travel suppliers/TMC professionals only

Decrease

Won't change/be impacted

Increase

Don't know/Not applicable



Q. 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. (n=19)

U.S. government actions also pose revenue risks for business travel *suppliers and intermediaries*.

One-third of supplier/TMC professionals (37%) expect their company's business travel revenue will decline as a result of U.S. government actions.

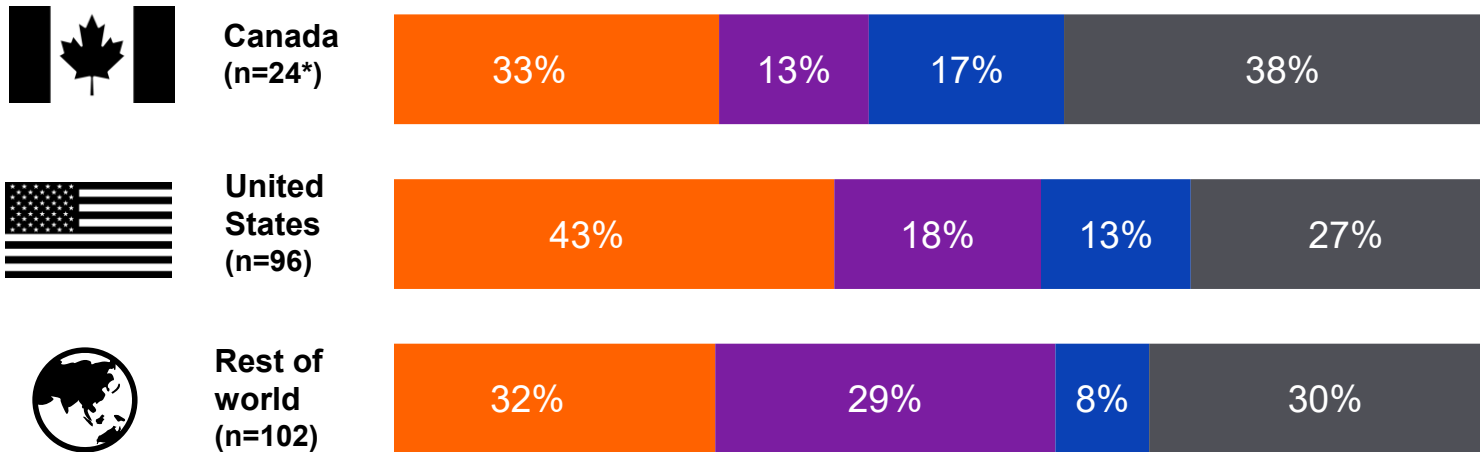
Travel Supplier/Intermediary's Perspective: Revenue

Across the World, Business Travel Companies Expect Revenue to Be Affected

How will your company's revenue be impacted by recent U.S. government actions?

Travel suppliers/TMC professionals only

■ Decrease ■ Won't change/be impacted ■ Increase ■ Don't know/Not applicable



Q. 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. *Note: Question only displayed to travel suppliers/TMCs*

Negative revenue impacts are expected across the world.

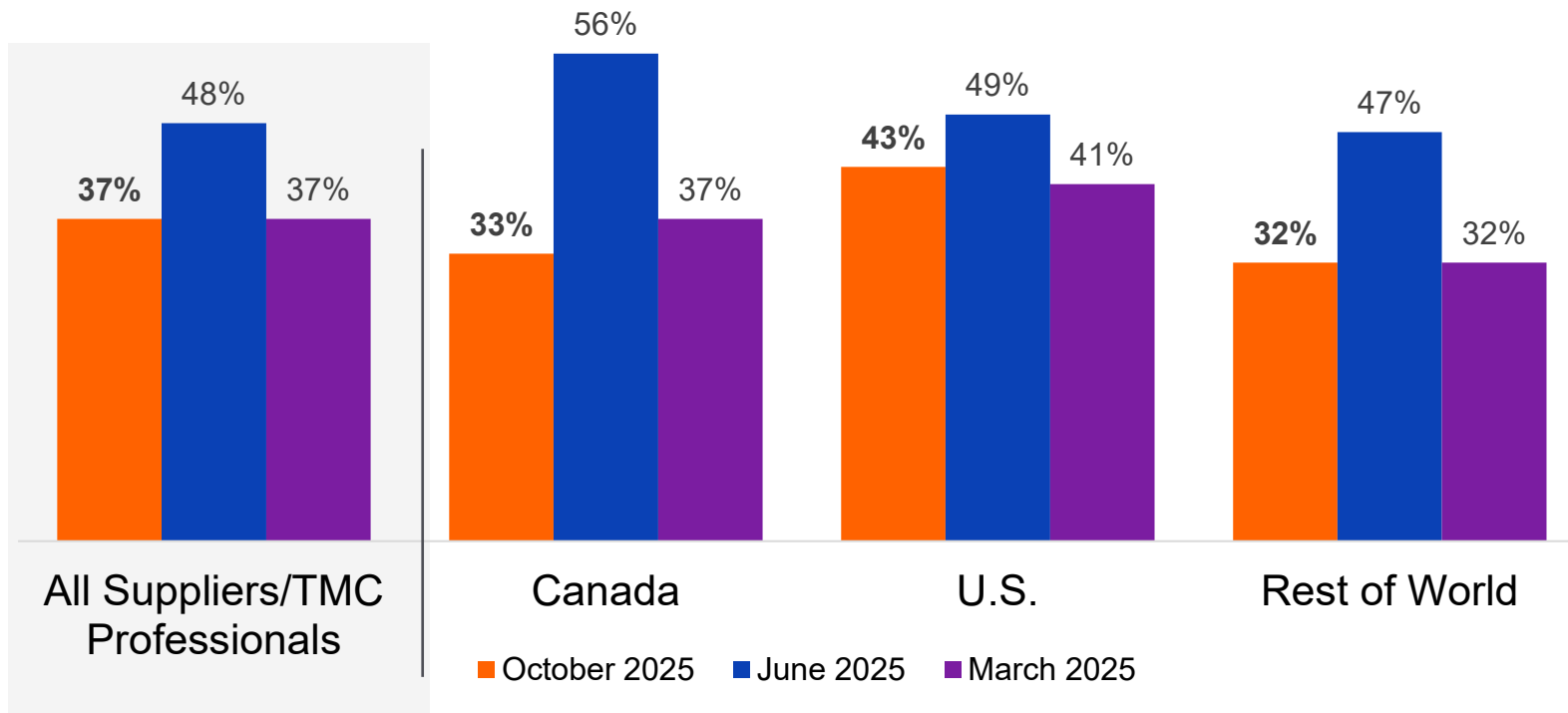
While Canada-based supplier/TMC professionals are most likely to expect a revenue decline, almost half of those in the U.S. (49%) and rest of the world (47%) also expect an impact.

Travel Supplier/Intermediary's Perspective: Revenue

Expected Business Travel Revenue: March Through October

Business Revenue Declines: March Through October

Expected revenue decrease (among suppliers/TMC professionals that expect a decrease)



Q. 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? *Note: Question only displayed to travel supplier/TMC professionals.*

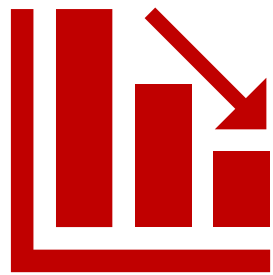
Revenue expectations improve fairly substantially from June.

The percentage of supplier/TMC professionals who expect a negative revenue impact at their company is lower in October (37%) than it was in June (48%).

Revenue Impacts May Be Substantial

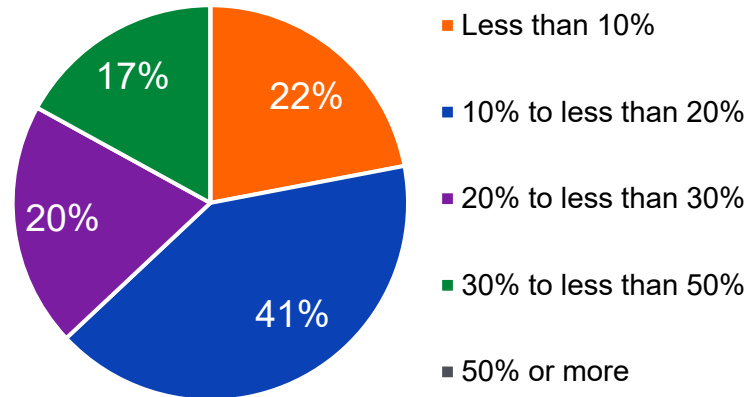
How much will company's revenue decline at your company as a result of new U.S. policies?

(among supplier/TMC professionals who expect a decline)



16%*

**This average is calculated from suppliers/TMCs who expect their company's business travel revenue will decline this year.*



Q. 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? *Note: Question only displayed to travel suppliers/TMC professionals who expect a decline (n=69)*

Supplier/TMC professionals who expect a revenue decline estimate it will be 16% on average.

Revenue Decreases Are Expected to Be Similar Across the World

How much will business travel revenue decline as a result of recent U.S. government actions?

(averages among supplier/TMC professionals who expect a decline)



The same average revenue decline is expected by supplier/TMC professionals within and outside the United States.

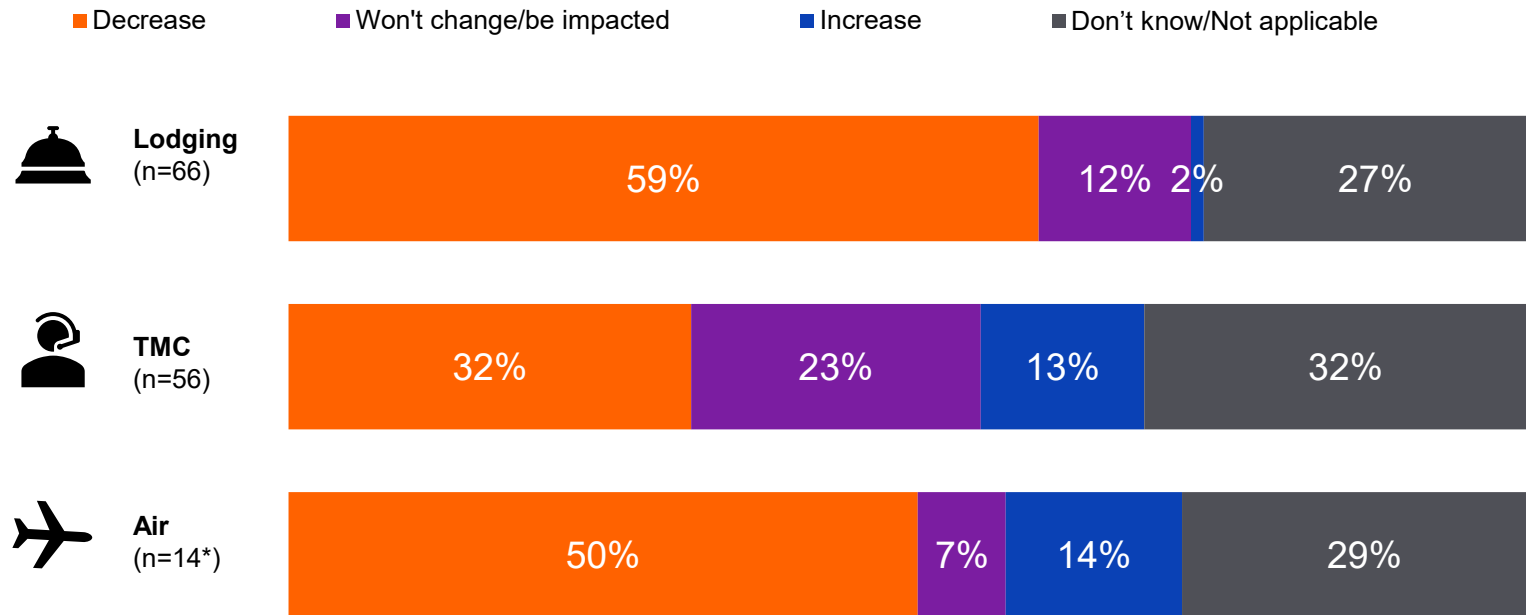
Q. Thinking about 2025 as a whole, how do you think has your organization's business travel revenue will be impacted as a result of U.S. government announcements/actions? *Note: only displayed to travel suppliers/TMC professionals who expect a decline*

Travel Supplier/Intermediary's Perspective: Revenue

Lodging Suppliers Are Most Worried About Revenue Impacts

How will your company's revenue be impacted by recent U.S. government actions?

(travel suppliers/TMC professionals only)



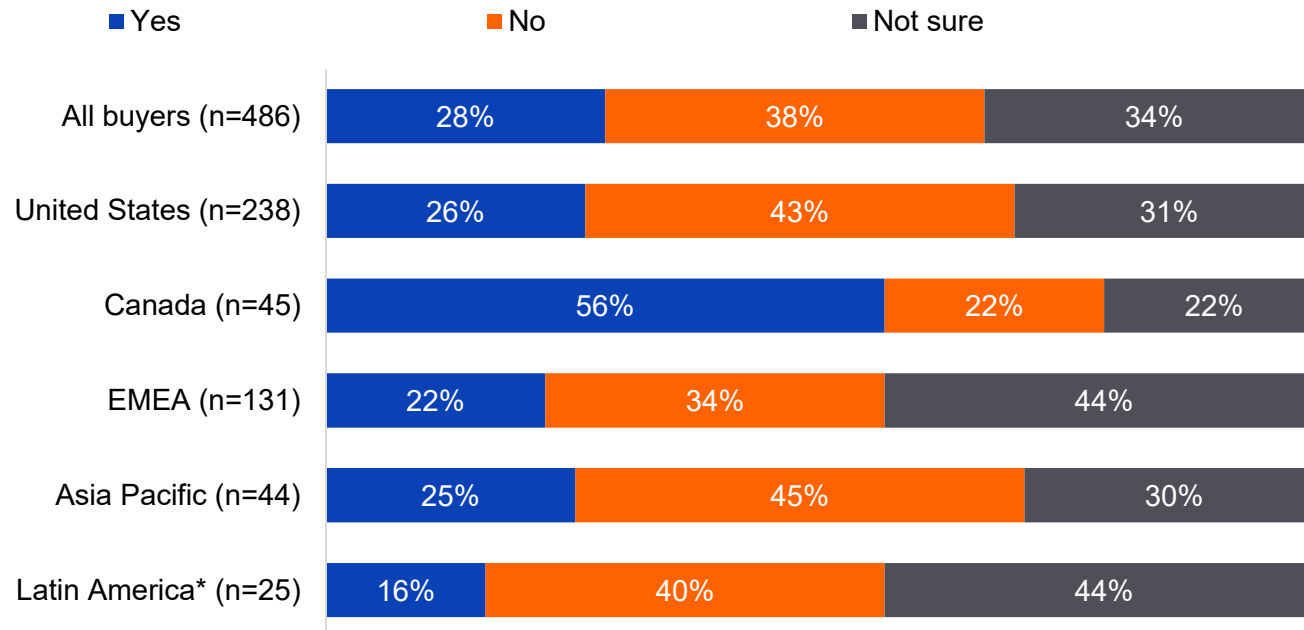
Revenue concerns are more pronounced in the lodging sector.

Three in five lodging/accommodations professionals (59%) expect their company's revenue will decline as a result of U.S. government actions.

This is substantially higher than the share of TMC professionals (32%) who expect a negative impact.

Will Government Actions Deter Employees From Traveling to the U.S.?

Have Any Employees Declined Business Travel Within/To the U.S.?



Have any employees declined U.S.- based business trips due to concerns related to U.S. government actions (e.g., safety, border restrictions, visa uncertainty)?

Note: Results filtered for travel buyer/procurement professionals

**indicates small sample size*

U.S. government actions can deter business travel.

Employees might *decline* to travel to the U.S.

For instance, some employees might not book travel because they fear an impending “travel ban” on their country of origin.

One in three respondents (28%) say employees have declined U.S.-based business trips due to concerns related to U.S. government actions.



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Business Travel Patterns and Policies

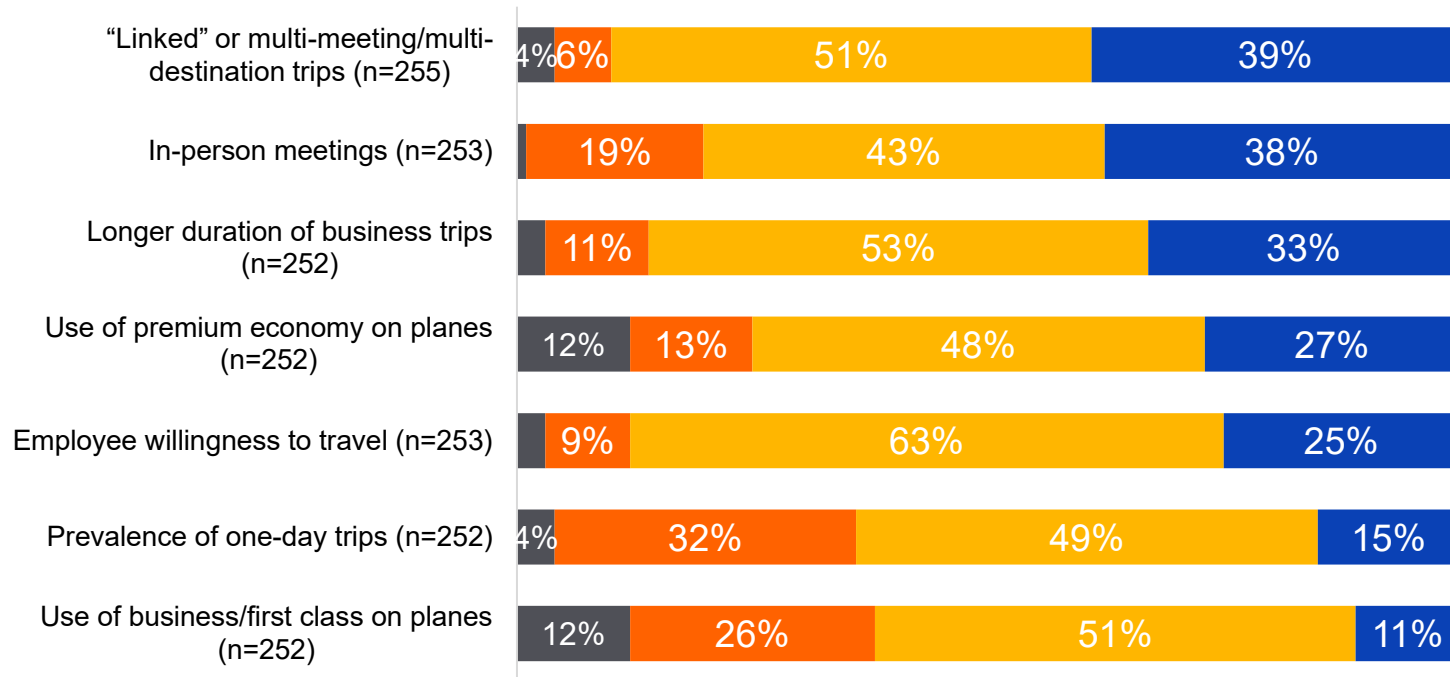


Business Travel Patterns Evolve

How have you company's travel patterns changed in 2025?

travel buyers only

■ Not at all ■ Much Less/Somewhat Less ■ About the same ■ Much More/Somewhat More



Q. How have the following traveler behaviors changed in your organization in 2025 versus last year?

Business travel evolves.

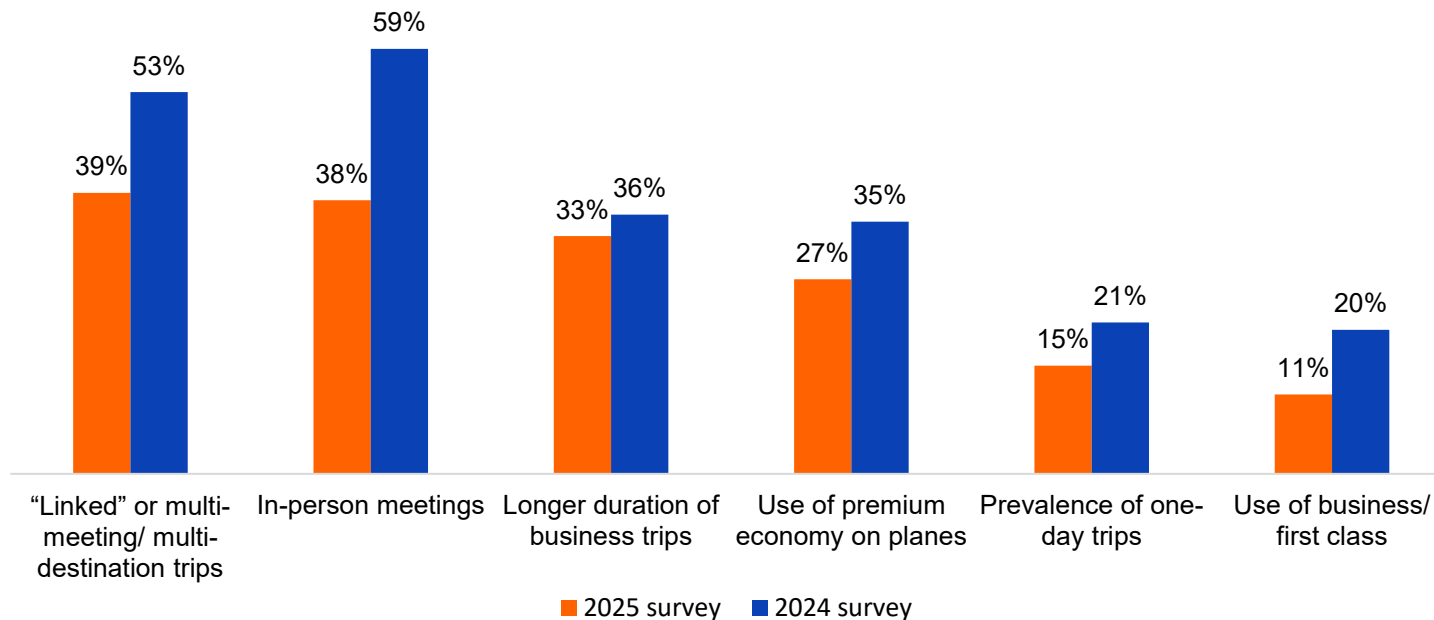
Two in five travel buyers (39%) saw an increase in "linked" business trips at their company over the past year. These combine multiple trips together – with employees making multiple stops or conducting separate business meetings on the same trip.

Day trips decline, while duration increases: One-third of buyers (32%) say the number of single-day trips **decreased** at their company over the past year. One-third (33%) have seen a **longer duration** of trips at their company over the past year.

Premium economy bookings continue to grow within managed travel programs even as **business class/first class** remains fairly stagnant.

Business Travel Patterns Evolve (Cont.)

How have company's travel patterns changed in 2025?
% "somewhat more" or "much more"



Q. How have the following traveler behaviors changed in your organization in 2025 versus last year?

Trends continue – but with less momentum.

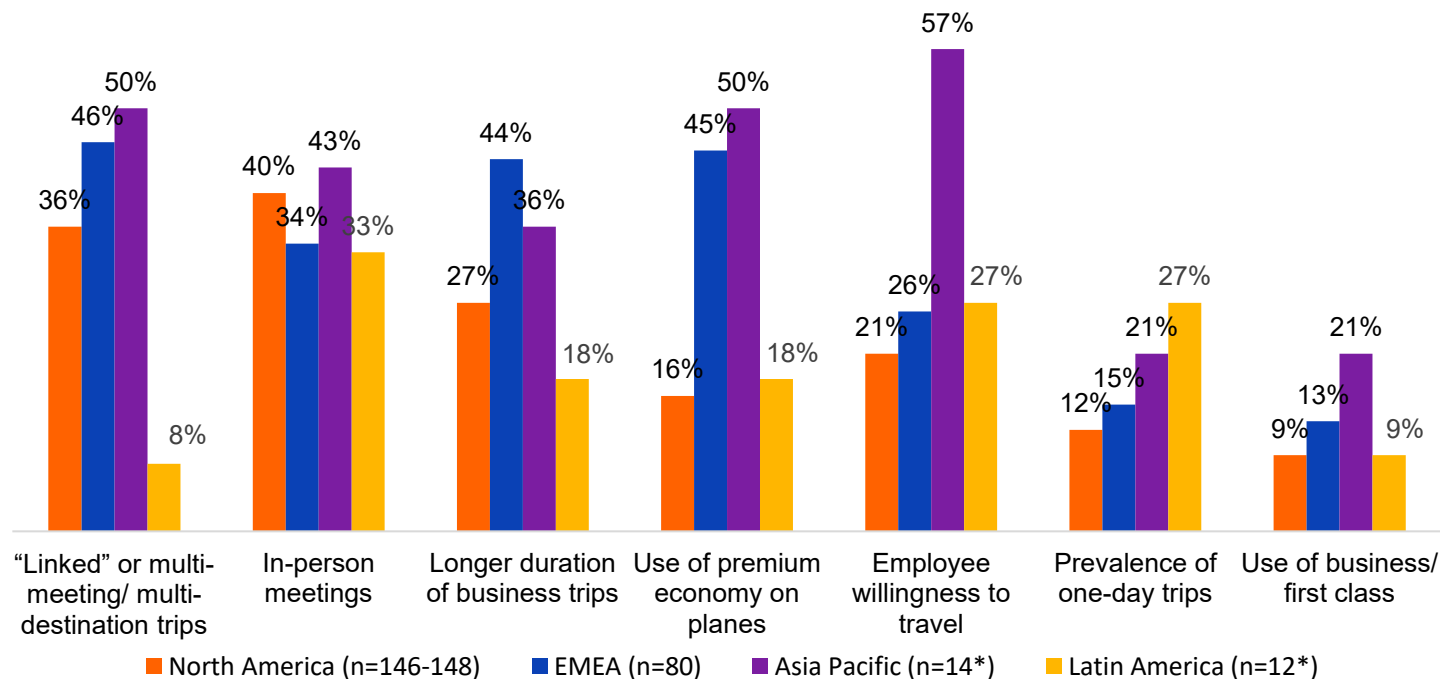
Last year, GBTA asked a similar question about business travel patterns. Those results can be compared to this year's survey.

The same trends seen last year have largely continued this year. However, they are losing momentum.

For instance, two in five buyers (39%) have seen an increase in linked trips this year. This compares to more than half (53%) who saw an increase last year.

Business Travel Patterns Evolve (Cont.)

How have company's travel patterns changed over the past year?
% "much more" or "somewhat more"



Q. How have the following traveler behaviors changed in your organization in 2025 versus last year?

**indicates small sample size within Asia Pacific and Latin America (n<30)*

Premium economy surges in EMEA.

Almost half of EMEA-based travel managers (45%) saw an increase in premium economy flights within their program over the past year.

This is higher than the share of North America-based travel managers (16%) who saw an increase.

Travel Policies Are Split on Homeshares

How do travel policies address short-term rental accommodations?



Q. Does your company's travel policy permit the use of short-term rental accommodations (e.g., Airbnb, Vrbo) for business travel?
Please select the option that best describes your company's current stance. (n=255)

The sharing economy represents an important part of the travel landscape.

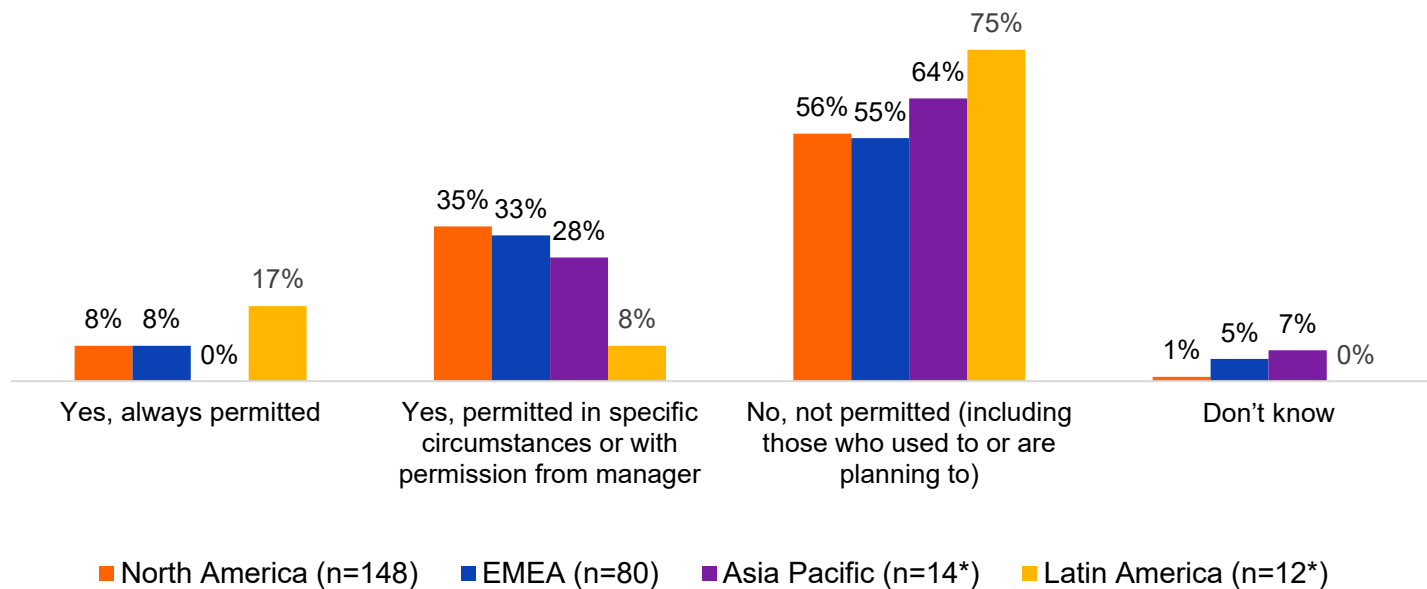
Ridesharing (e.g., Uber) is widely accepted within managed travel programs. However, programs are split when it comes to **homesharing** (e.g., Airbnb).

More than half of travel policies (57%) do not allow homesharing. Only 8% of policies *always* allow it.

Other policies (32%) allow it – but only in specific circumstances (19%) or with approval from an employee's manager (13%).

There Are Few Regional Differences When It Comes to Homeshare Policies

How do travel policies address short-term rental accommodations?



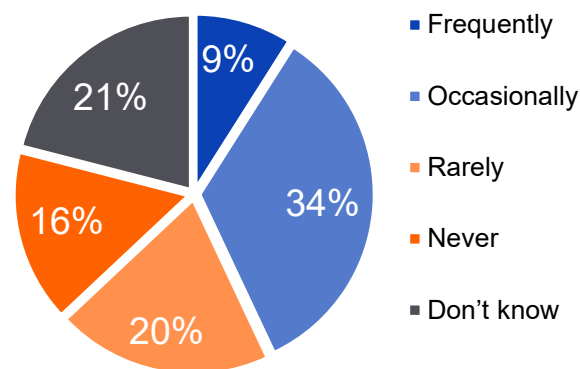
Q. Does your company's travel policy permit the use of short-term rental accommodations (e.g., Airbnb, Vrbo) for business travel? Please select the option that best describes your company's current stance. (n=255)

*indicates small sample size within Asia Pacific and Latin America (n<30)

There are few regional differences when it comes to homeshare policies.

Business Travelers Sometimes Personally Pay for Perks and Upgrades

How often do business travelers personally pay for out-of-policy perks and upgrades?

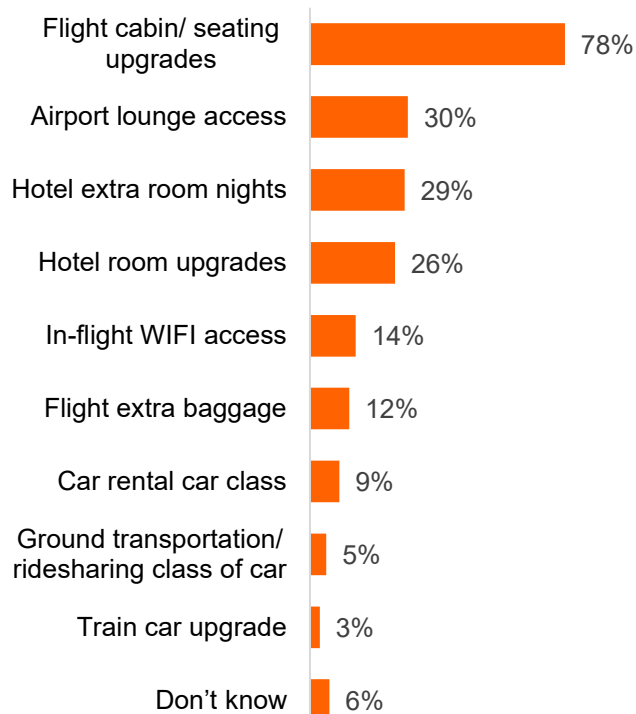


Q. Are employees in your organization personally paying the difference to upgrade themselves for individually preferred or out-of-policy travel options (i.e. flights, hotel stays etc.)? (n=527)

If at least "rarely"

What are business travelers paying for?

Multiple answers allowed



Q. If so, what employee-paying bookings or upgrades are you most commonly seeing? Please select all that apply. *Note: Question only displayed to buyers who indicated employees at least rarely personally pay for various perks and upgrades (n=329)*

Many business travelers are high-earning professionals with discretionary income.

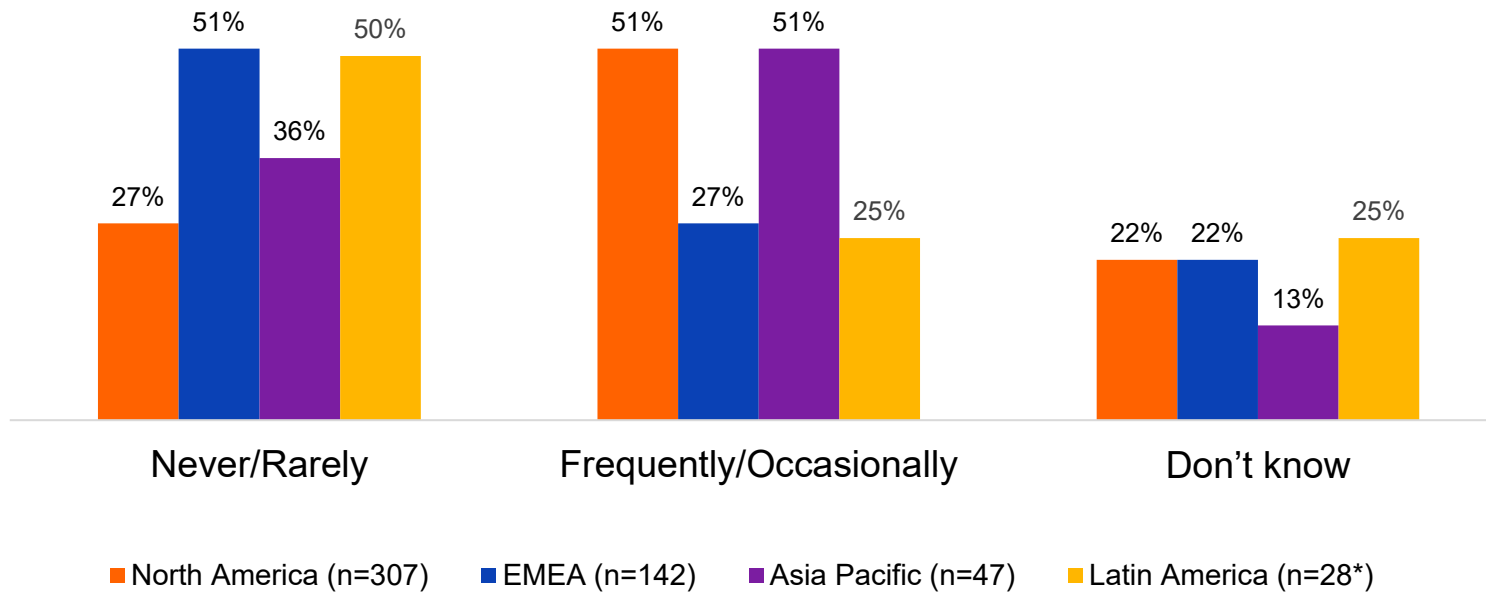
They might choose to pay for travel perks and upgrades even when their company does not reimburse them.

Two in five travel managers (43%) say their company's employees do this at least occasionally.

However, travel programs rarely have workflows and technology to facilitate this. For instance, corporate booking tools (OBTs) do not allow employees to book business class out-of-policy and calculate the portion for which the employee is responsible based on the cost of a comparable economy flight.

Employee-Paid Upgrades Are More Common in North America and APAC

How often do business travelers personally pay for out-of-policy perks and upgrades?



Q. Are employees in your organization personally paying the difference to upgrade themselves for individually preferred or out-of-policy travel options (i.e. flights, hotel stays etc.)?

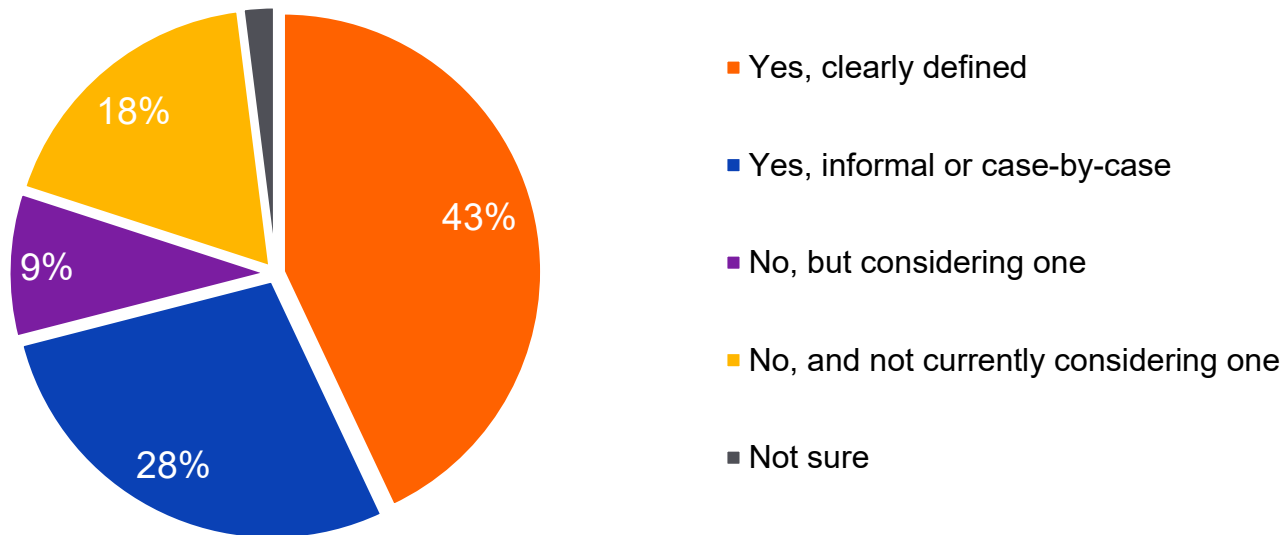
*indicates small sample size for Latin America (n<30)

Employee-paid upgrades are more common in North America and Asia Pacific.

Half of buyers in these regions say their employees pay for their own upgrades out-of-pocket at least occasionally. This is significantly higher than the share in EMEA (27%) and Latin America (25%).

For Some Travel Programs, “Blended” Travel Remains a Grey Area

Does your organization have policies/ guidelines for “blended” travel?



Q. Does your company have a policy or guidelines regarding blended travel, i.e. combining business trips with leisure travel?

Note: Question only displayed to travel buyers/procurement professionals (n=253)

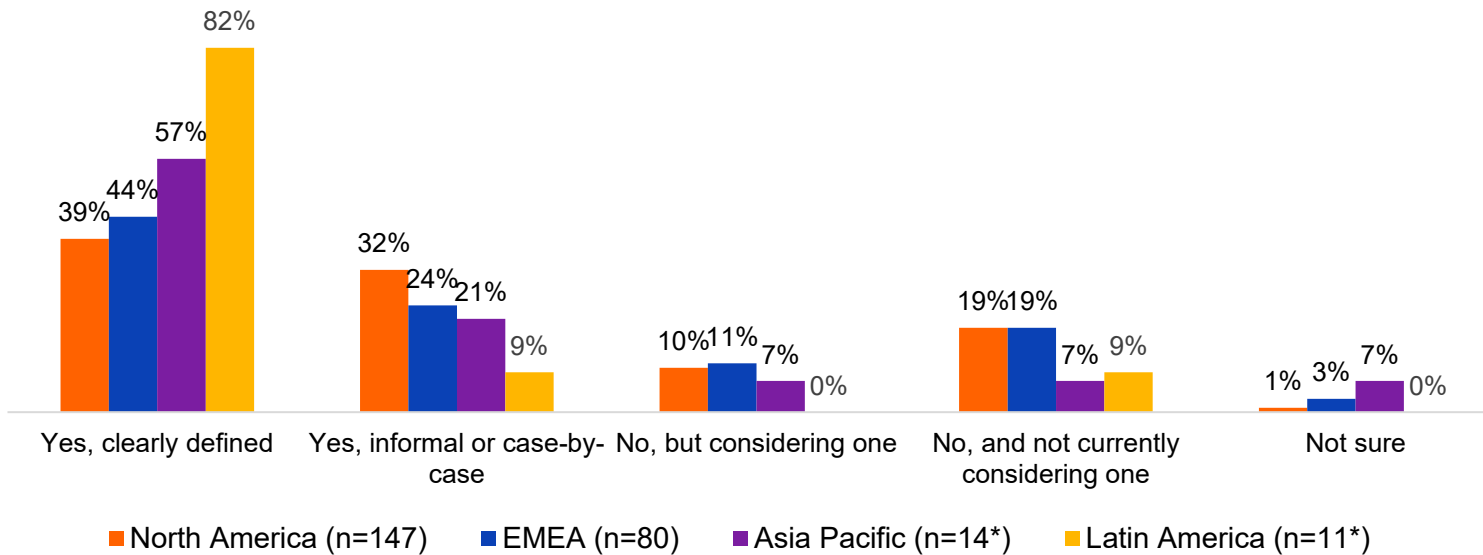
“Blended” trips combine business and personal travel.

Two in five travel programs (43%) have clearly defined policies/ guidelines for blended travel.

One-quarter (28%) say their program addresses blended travel informally – or on a case-by-case basis.

Does “Blended Travel” Vary by Region?

Does your organization have policies/ guidelines for “blended” travel?



Q. Does your company have a policy or guidelines regarding blended travel, i.e. combining business trips with leisure travel?

Note: Question only displayed to travel buyers/procurement professionals

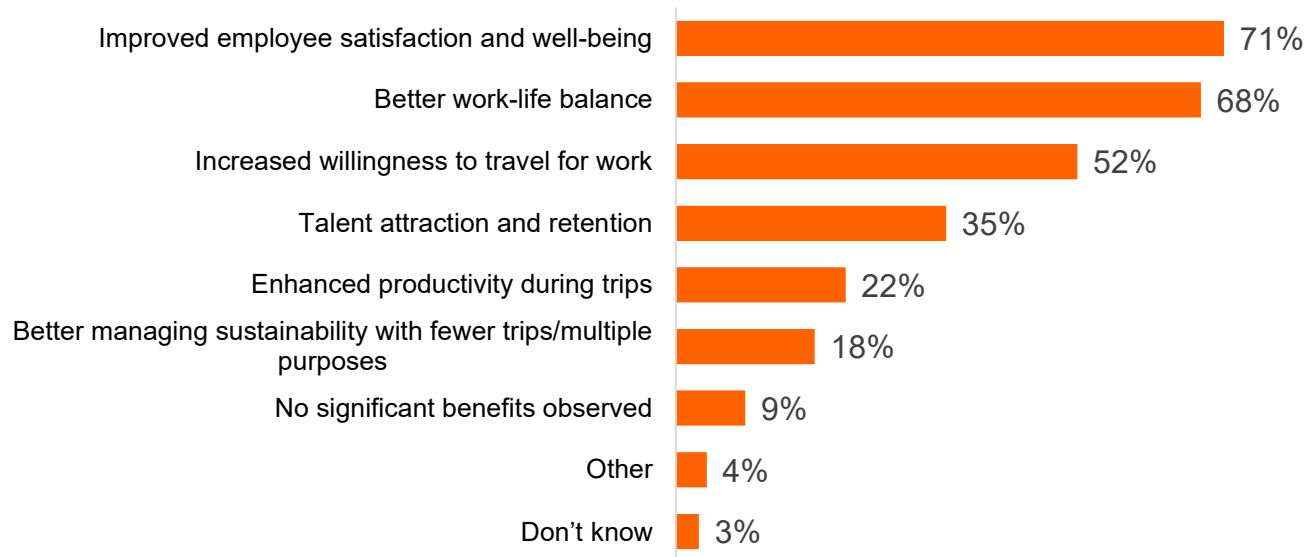
**indicates small sample size for Asia Pacific and Latin America (n<30)*

North American travel programs are more likely to allow blended travel on an informal/case-by-case basis.

One-third of travel programs in North America (32%) have informal/case-by-case policies on blended travel.

Travel Buyers Point to Benefits From “Blended” Travel

What are the benefits of allowing blended travel within your organization?
travel buyers only



Q. What benefits do you see or anticipate from allowing blended travel in your organization? Please select all that apply.

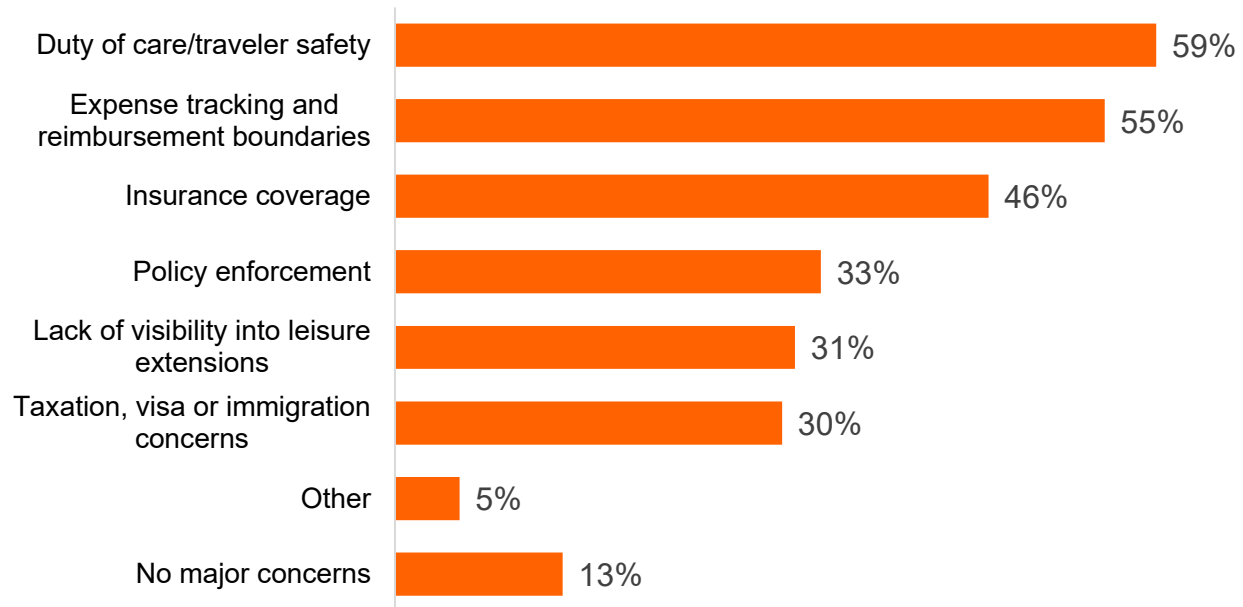
Note: Question only displayed to travel buyers/procurement professionals

Travel buyers point to benefits from allowing blended travel.

These include improved employee satisfaction and well-being (71%) and better work-life-balance (68%).

Do the Challenges With “Blended” Travel Outweigh the Benefits?

What are the challenges that your organization faces with blended travel?
travel buyers only



Q. What concerns or challenges does your organization face with blended travel? Please select all that apply.

Blended travel also comes with challenges.

These include duty of care/traveler safety (59%), expense tracking and reimbursement boundaries (55%), and insurance coverage (46%).

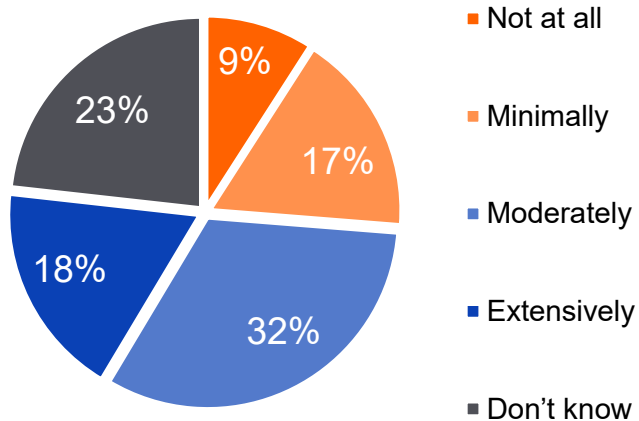
Each challenge is indicated by **fewer buyers** than are key benefits (see previous page). In other words, the perceived **benefits** of blended travel appear to **outweigh** the challenges for some travel programs.

Suppliers Are More Likely to Think They Adequately Accommodate Accessibility Needs

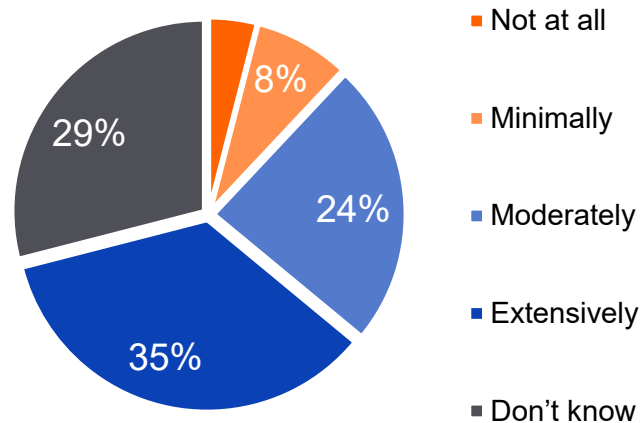
How does your company currently accommodate travelers with accessibility needs (e.g., mobility, vision, hearing, neurodiversity) within its corporate travel program?



Travel buyers
(n=250)



Travel suppliers/TMCs
(n=144)



Accessible travel is a shared responsibility.

Travel programs have a responsibility to understand the unique needs of their travelers, curate accessible options, and display these options in an accessible way. **Travel suppliers** have a responsibility to provide accessible products and services.

In general, *suppliers/TMCs* feel they do a better job with accessibility than *travel programs*.

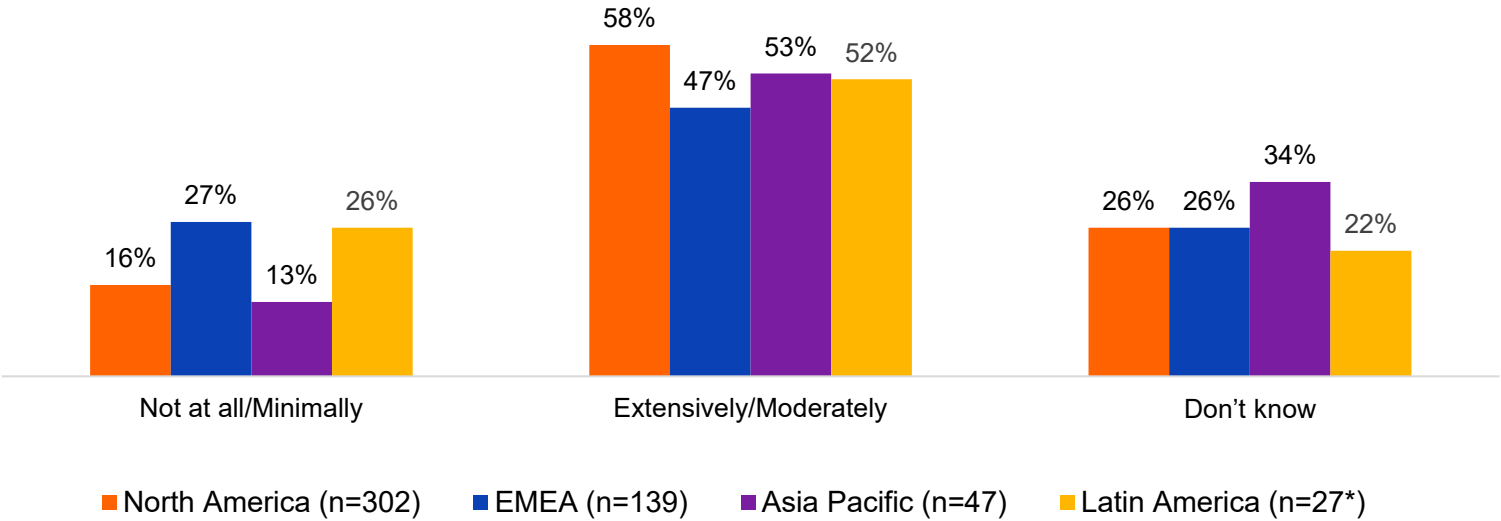
One-third of travel supplier/TMC professionals (35%) say their company extensively accommodates travelers with accessibility needs.

This compares to only one in five (18%) travel managers.

Q. How does your company currently accommodate travelers with accessibility needs (e.g., mobility, vision, hearing, neurodiversity) within its corporate travel program?

Is Accessible Business Travel Lagging in EMEA?

How do companies accommodate employees with accessibility needs?



Q. How does your company currently accommodate travelers with accessibility needs (e.g., mobility, vision, hearing, neurodiversity) within its corporate travel program?

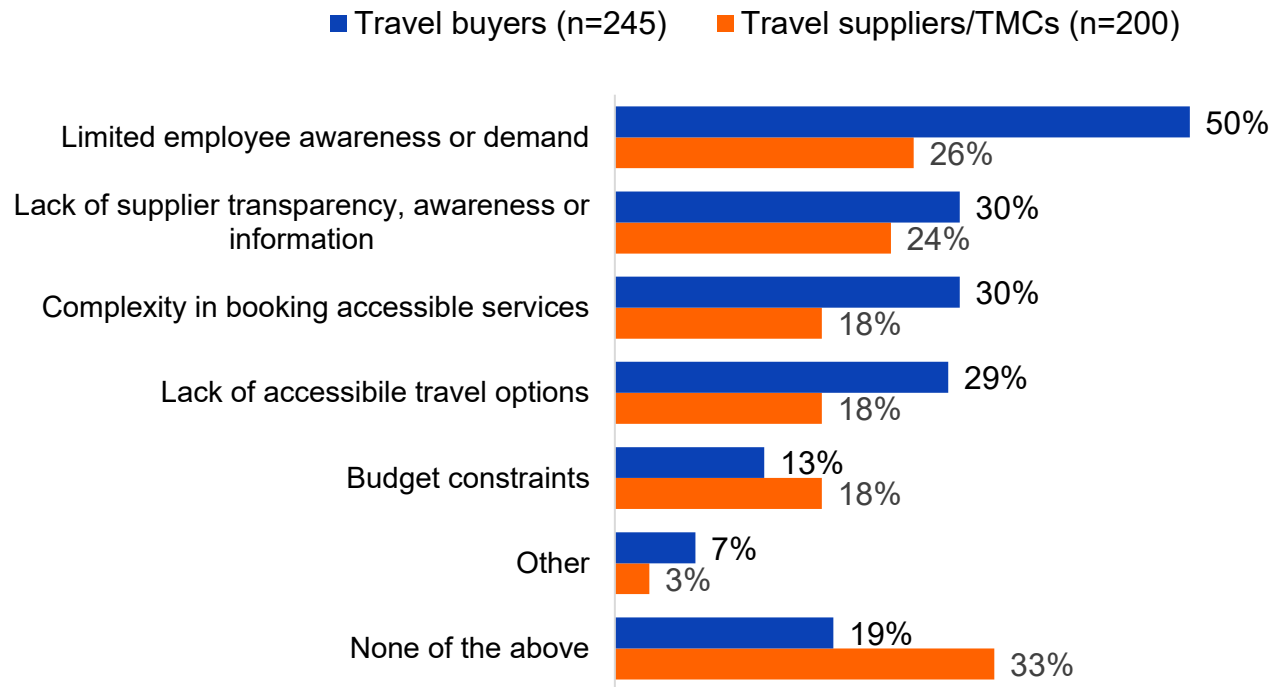
**indicates small sample size in Latin America (n<30)*

Is accessible business travel lagging in EMEA?

Respondents in the region are least likely to say their company “extensively” or “moderately” accommodates accessibility needs.

Suppliers Are More Likely to Think They Adequately Accommodate Accessibility Needs

What are the challenges that organizations face with providing accessible travel options?



Q. What are the biggest challenges your company faces in offering accessible business travel options? Please select all that apply.

Buyers and suppliers face challenges when it comes to accessible travel.

For buyers, **limited employee awareness** is the top challenge.

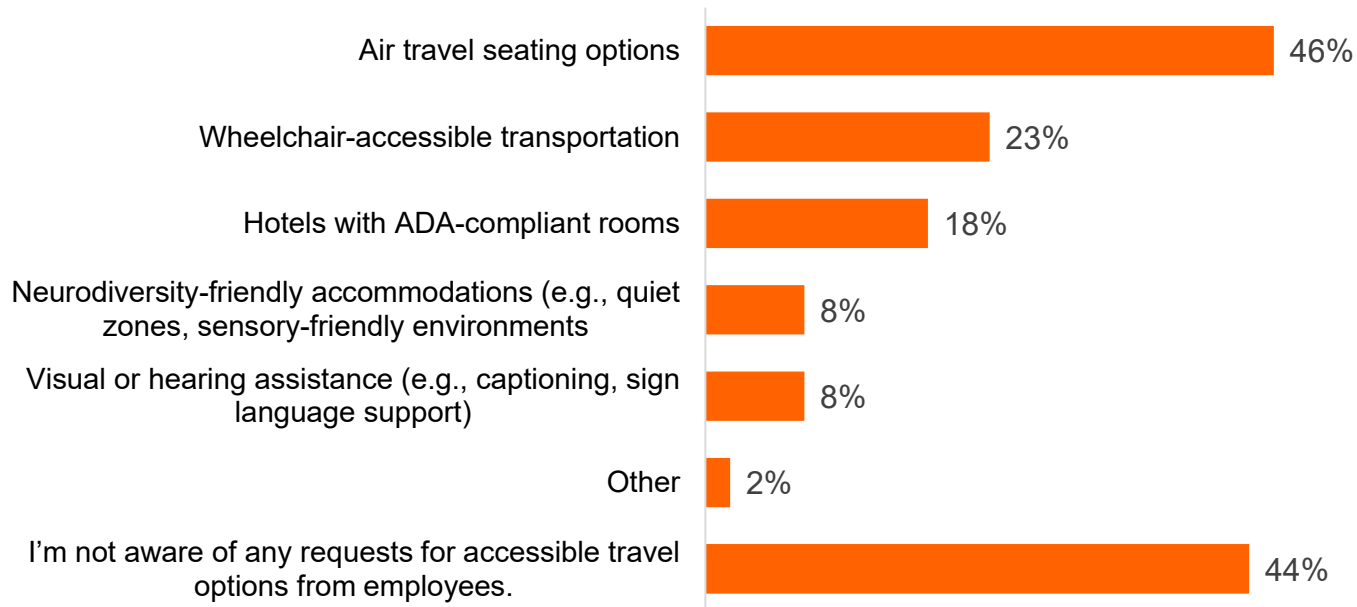
Buyers are more likely than suppliers/TMCs to say **booking complexity** is a challenge.

Buyers and suppliers are equally likely to say **budget** is a challenge.

What Accessibility-Related Requests Do Buyers Receive?

Which accessible travel options did employees request most frequently in the past year?

travel buyers only; multiple answers allowed



Q. What types of accessible travel options or services have employees most frequently requested in the past 12 months? Please select all that apply.

Travel programs receive accessibility-related requests from employees.

Surprisingly, visual/hearing-related requests are fairly uncommon.

Travel policies are commonly written in small text. Videos and trainings might not have captions.

However, employees might be self-conscious about raising the issue when this occurs.



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Agentic Artificial Intelligence (AI)



Agentic AI

For three years, the world has been transfixed by Artificial Intelligence (AI). The most widely known type of AI is “generative” AI. These are tools that can create original text, images, or other content based on **specific prompts or instructions** provided by users.

Another form of AI is arguably even more important. This is **agentic AI**. Agentic AI can autonomously perform multi-step tasks toward achieving a **loosely defined** goal or outcome – troubleshooting problems that arise in the process.

In the context of managed business travel, agentic AI would perform some of the same tasks that a travel agent or travel manager would. It would interpret data and proactively offer solutions – without human intervention.

Agentic AI has the potential to improve efficiency and reduce traveler friction. Yet, it might also replace business travel industry jobs.



Supplier/TMC Companies Are Further Along With Agentic AI

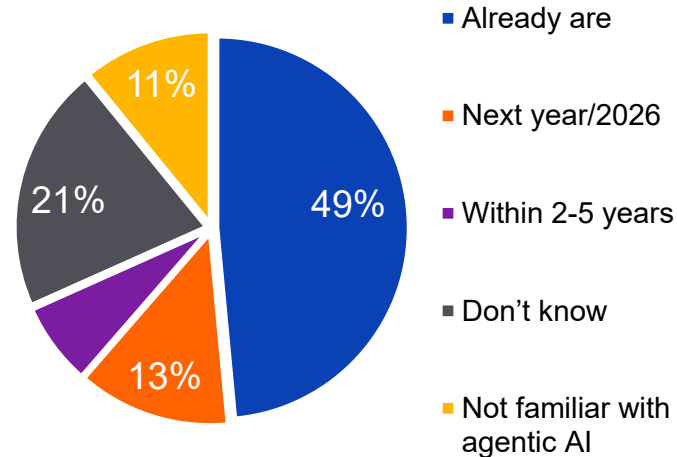
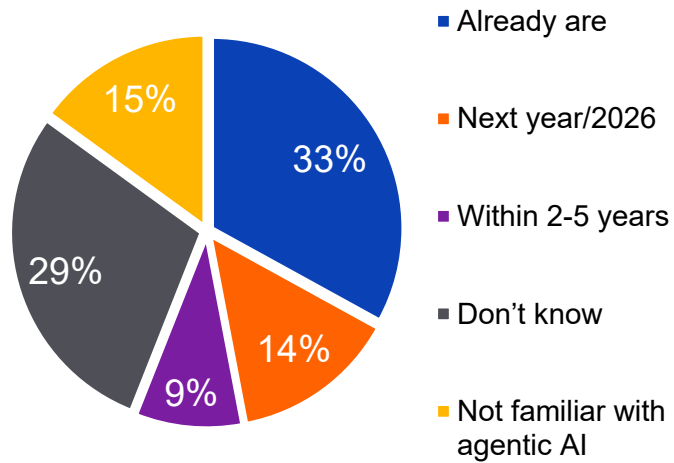
What is the timeline for your company experimenting with agentic AI?



Travel buyers
(n=244)



Travel suppliers/TMCs
(n=197)



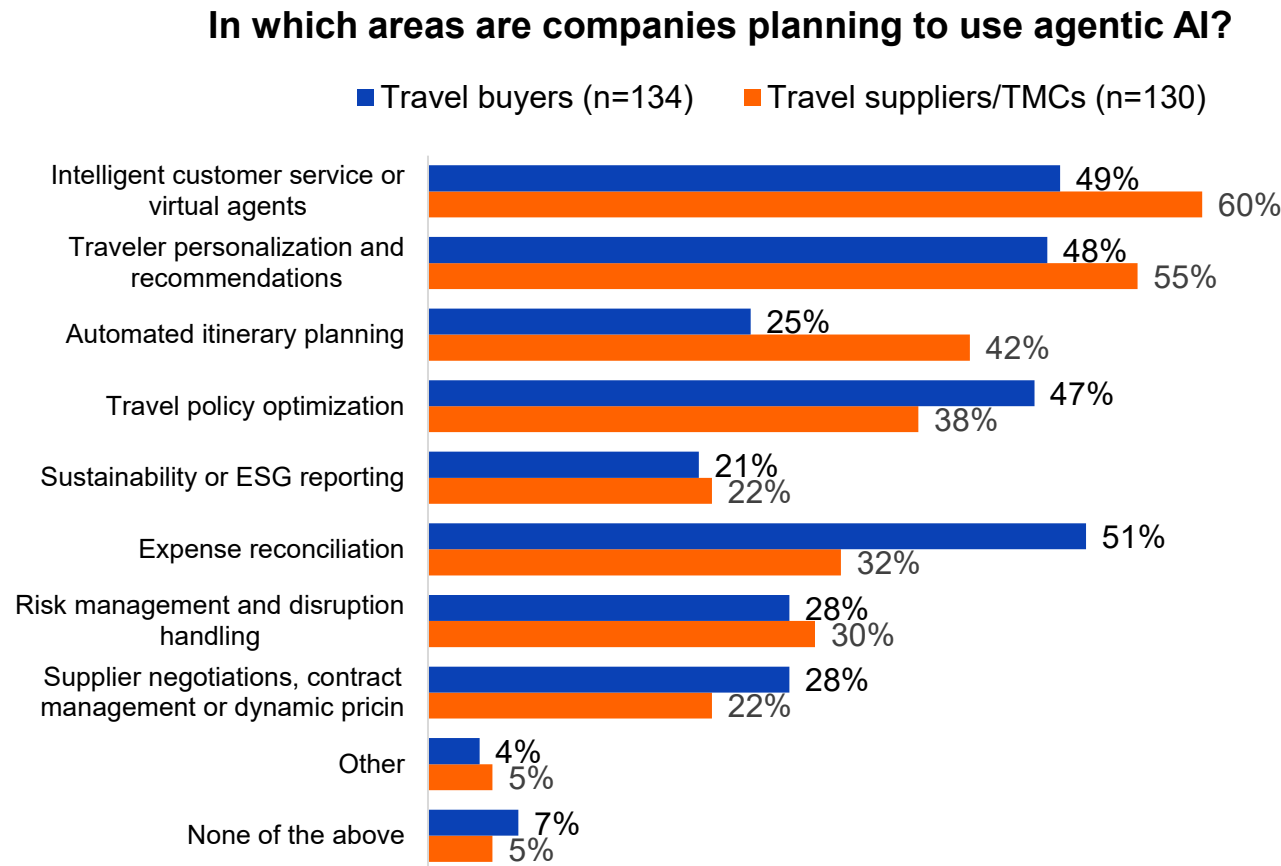
Suppliers/TMCs are further along with agentic AI.

Half of supplier/TMC professionals (49%) say their company has started experimenting with agentic AI.

This is higher than the share of buyers (33%) who say so.

Q. What is the timeline for when your company will likely start experimenting with Agentic AI?

How Are Suppliers/TMCs Using Agentic AI?



Q. In which areas of your business travel operations or services are you using or planning to use Agentic AI? Please select all that apply.

Suppliers/TMCs are planning to use agentic AI in different areas.

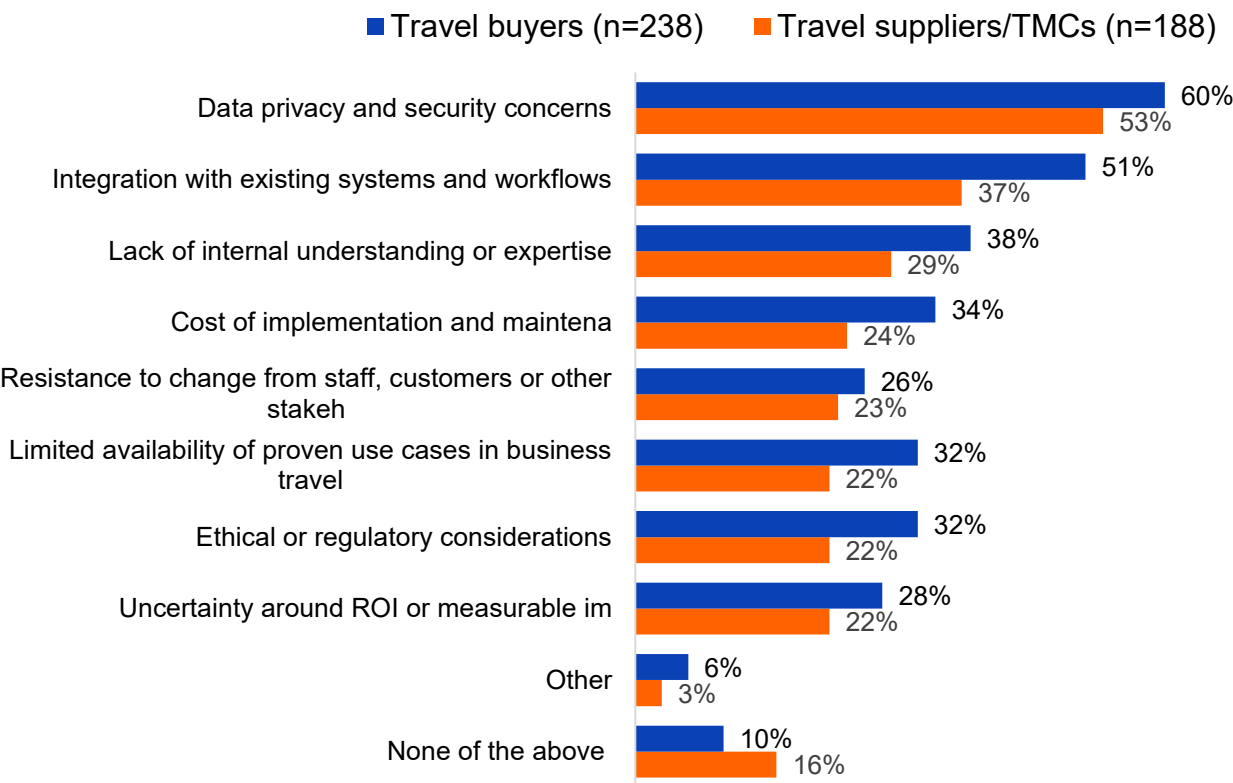
These include customer service/virtual agents (60%), traveler personalization/recommendations (55%), and automated itinerary planning (42%).

Fewer suppliers/TMCs plan to use agentic AI for risk management/disruption handling (30%). This is too nuanced and important to automate.

AI will certainly help with disruption handling. However, autonomous AI agents will take a backseat to humans using AI.

Some Business Travel Professionals Have Concerns About Agentic AI

What are your biggest challenges or concerns about agentic AI?



Q. What are the biggest challenges or concerns you face regarding the adoption of Agentic AI? (Select all that apply)

Even as agentic AI is adopted, some business travel professionals have concerns.

Data privacy/security is the top concern indicated by both buyers (60%) and supplier/TMC professionals (53%).

Integration with established systems and workflows is also a top concern.



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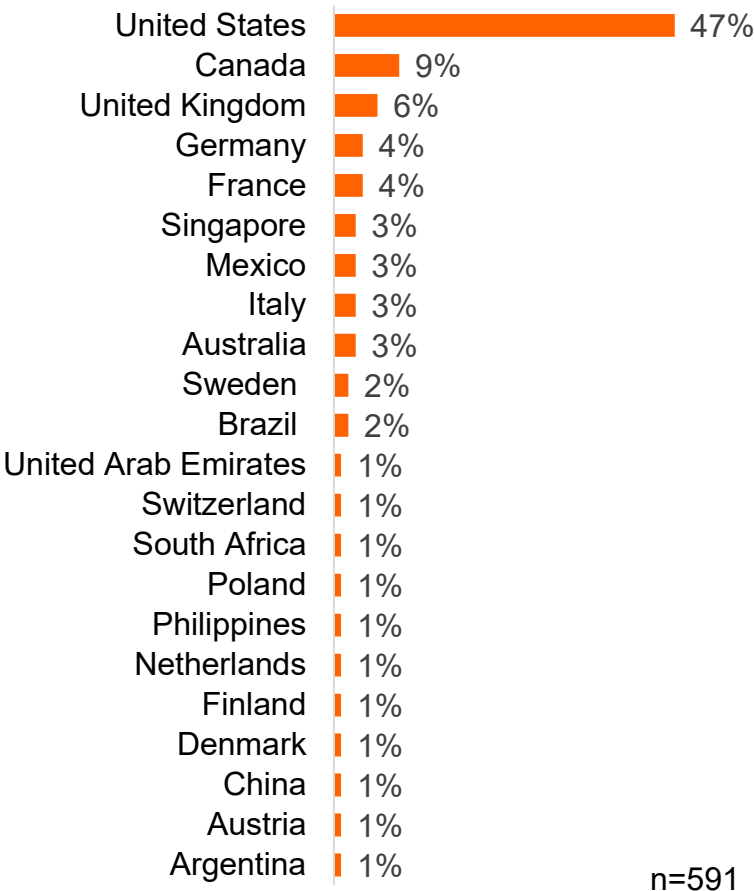
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Respondent Profile

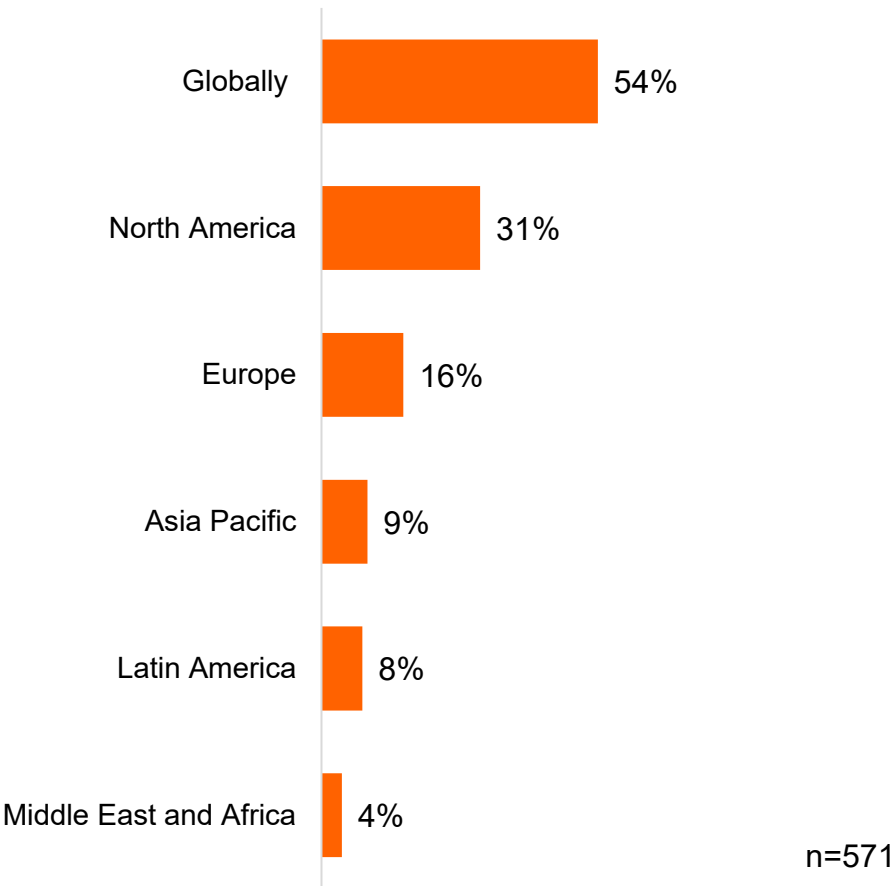


Respondent Profile

Country

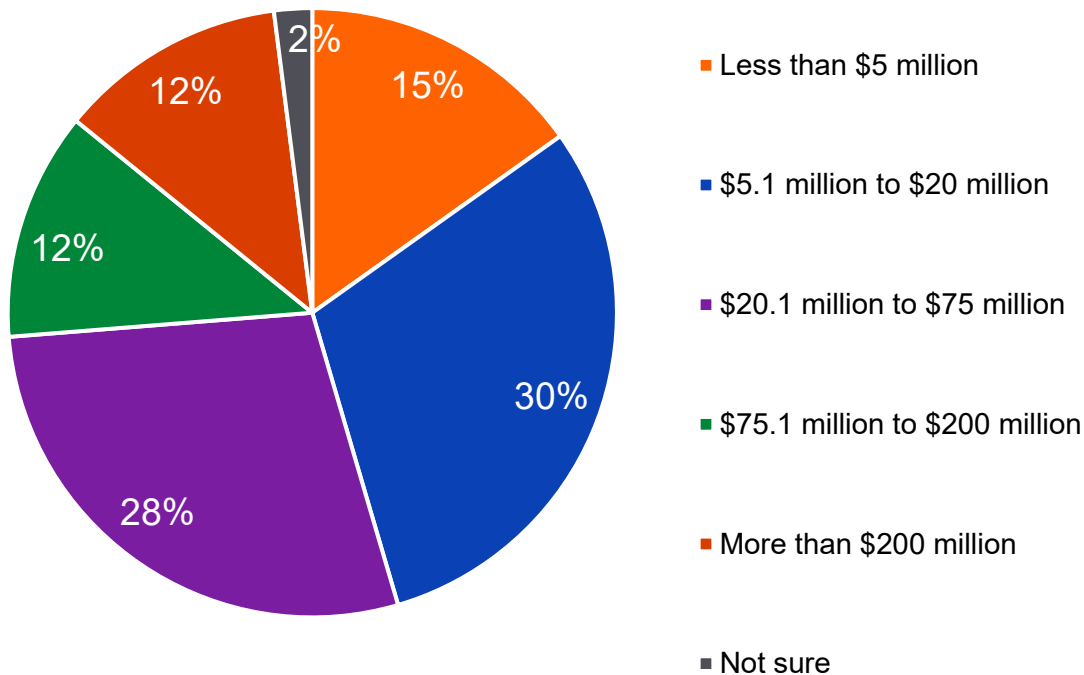


Scope of Responsibilities



Respondent Profile

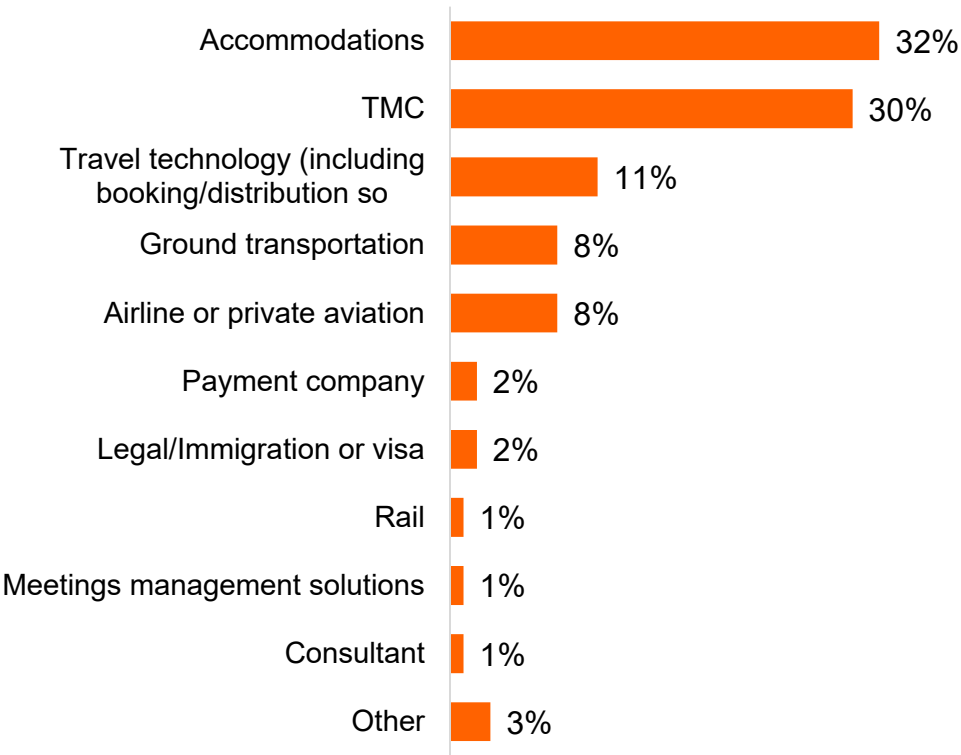
Buyer Company Travel Spend



n=271



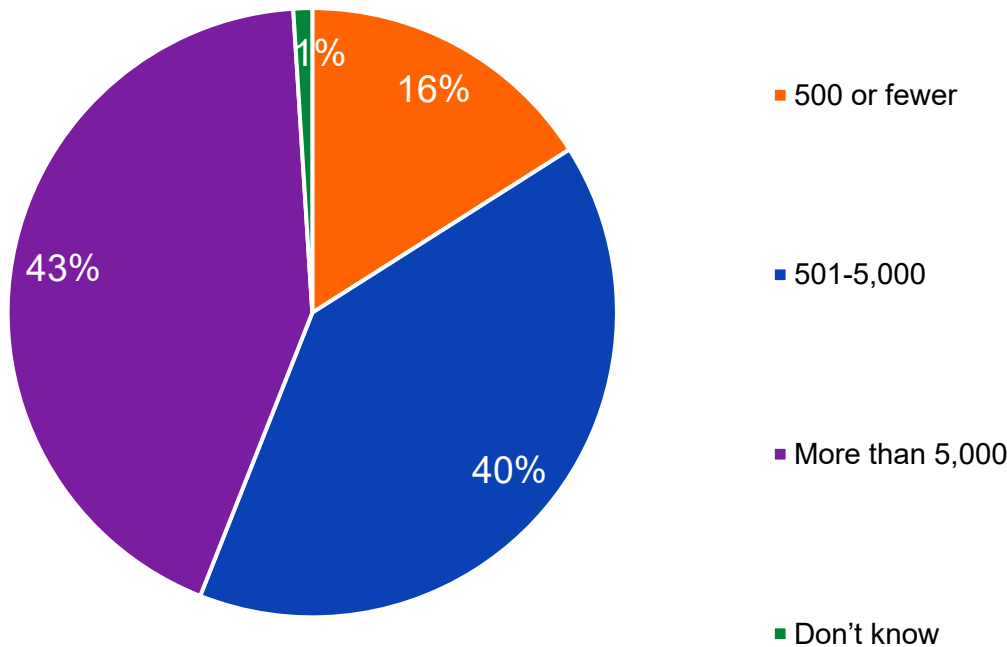
Supplier Companies



n=237

Respondent Profile

Number of travelers at organization
buyers only



n=271

Buyer Industries



n=237



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