



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA Business Travel Industry Outlook Poll

February 13, 2025



Key Highlights


- **A growing global economy boosts business travel.** Seven in 10 travel buyers (71%) say their company's business travel bookings increased last year.
- **Asia Pacific (APAC) led global business travel spend growth last year,** with more than three in four (78%) buyers in the region reporting a higher volume of trips compared to 2023 – including 30% who saw a significant increase.
- **Travel buyers generally have a positive outlook for the year ahead.** Nearly half (48%) expect their company will take more business trips this year than it did last year. Only 12% expect their company will take fewer trips.
- **Travel programs plan to pursue a number of strategic initiatives this year.** One-third (30%) are evaluating/changing Travel Management Companies (TMCs), with technology mentioned as the top reason for considering a switch.
- **Travel programs are slow to embrace Artificial Intelligence (AI).** Only about one-third of buyers (34%) expect their program will apply AI in significant ways this year.
- **Even as business travel increases, travel programs remain cautious about adding staff.** Only 16% of buyers expect their travel program's staff size will increase this year.
- **Unlike travel programs, travel companies continue to add staff.** Four in 10 supplier and TMC respondents (41%) expect their company will add staff this year. Only 6% expect their company will reduce staff. However, AI is expected to limit job growth. Of the supplier/TMC respondents who do not expect their company's staff size will increase, almost one-third (31%) mention efficiencies achieved through AI or other technologies as a reason.



7 in 10 travel buyers say their company's bookings increased last year

Key Highlights (Cont.)

- **Work policies become stricter – especially at supplier/TMC companies.** One-third of travel supplier/TMC respondents (34%) say their company's Work-From-Home (WFH) policies have become stricter over the past year. Employees are required to report to an office more often, or companies are more strictly enforcing requirements they already had.
- **Hybrid work schedules are most prevalent in Europe**, where more than three-quarters (77%) of business travel professionals report their company has a hybrid work policy for 2025, followed by APAC (62%), LATAM (58%) and NORAM (51%).
- **Business travel companies remain committed to people-focused initiatives.** A large majority of supplier/TMC respondents (77%) expect their company will increase or maintain support of people-focused initiatives (such as accessibility and inclusion) this year.
- **Business travel companies ramp up sustainability efforts.** Almost half of supplier/TMC respondents (48%) expect their company will increase support of sustainability efforts this year.



Some supplier/TMC policies have made their Work-From-Home (WFH) policies stricter

Methodology

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

- Data collection from January 21 through January 31, 2025
- An email invitation was sent to 17,893 business travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's Daily News Brief sent to travel professionals worldwide
- In total, 786 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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A Look Back – and a Look Ahead



The **Travel Buyer's** Perspective: 2024 Volume

How Did Your Company's Business Travel VOLUME Change Last Year? *travel managers only*



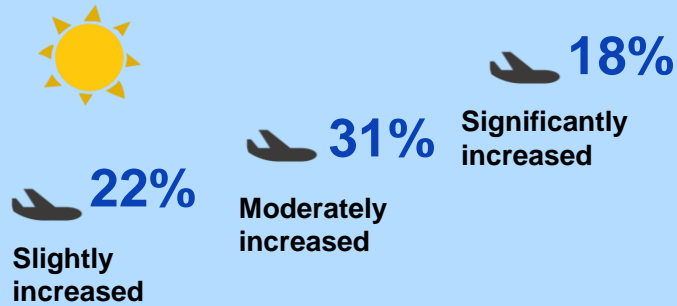
A growing global economy boosts business travel.

Seven in 10 travel buyers (71%) say their company's business travel bookings increased last year.

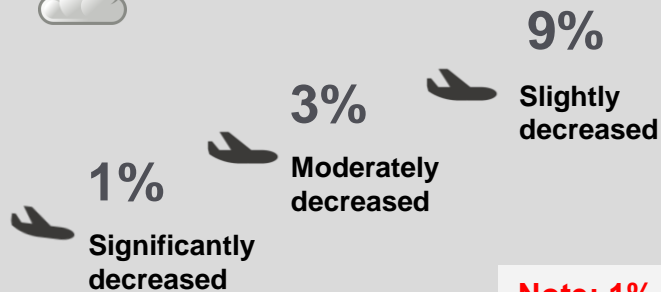
13%
say their company's volume decreased



71%
say their company's volume increased



15%
About the same/no significant change

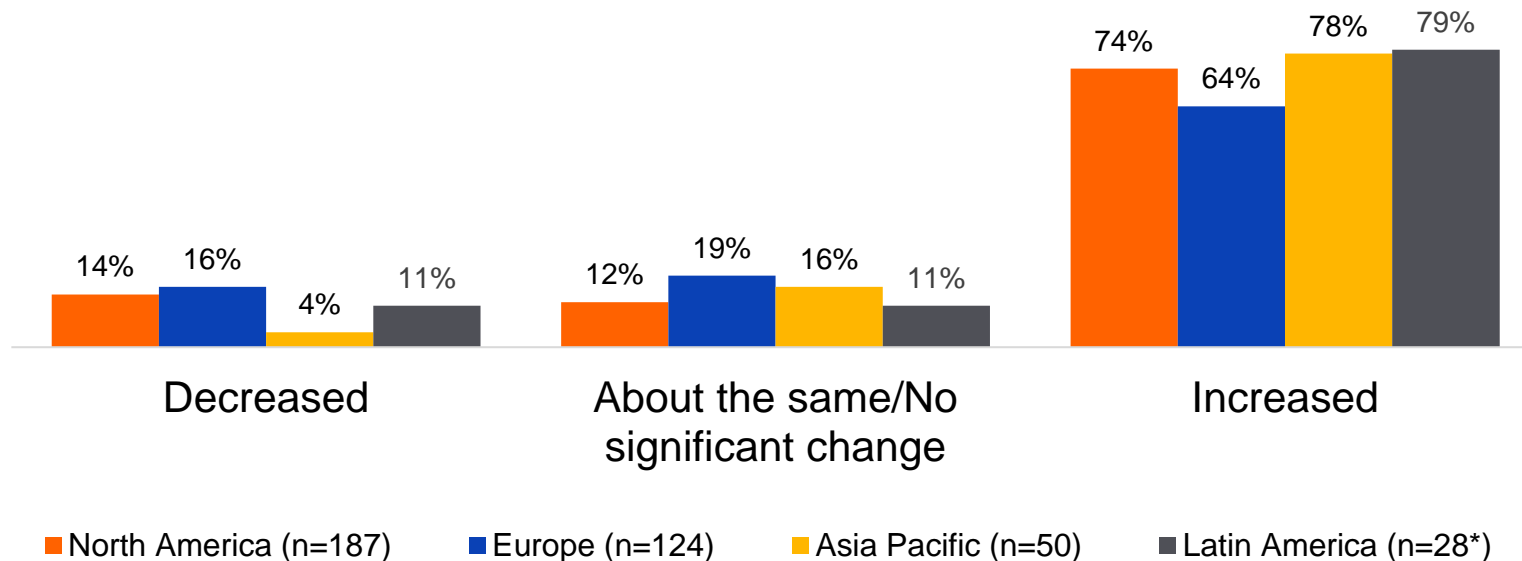


Note: 1% say don't know/not applicable

The **Travel Buyer's** Perspective: 2024 Volume

Business Travel Volume Increased Across All Regions

How Did Your Company's Business Travel Volume Change Last Year?
by region



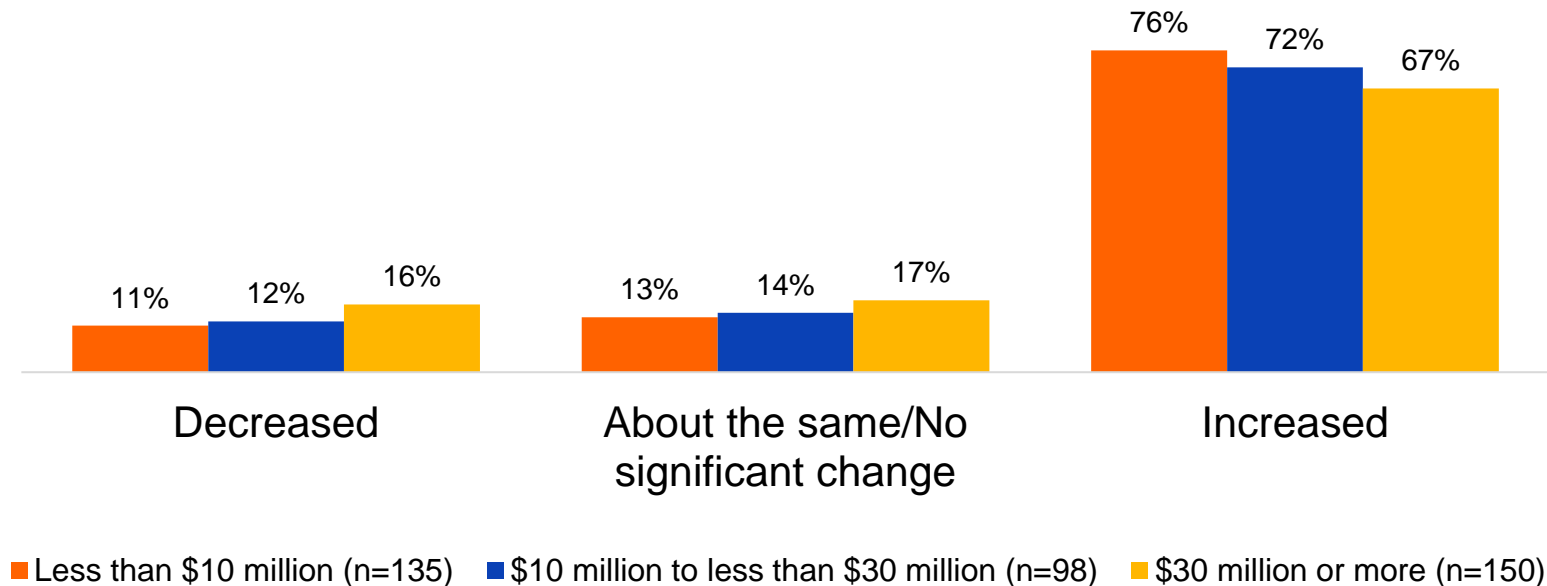
In Asia Pacific and Europe, business travel had lagged the most post-COVID. In 2024, they, like all regions, have seen volume increases YOY.

In 2024, APAC especially made up for lost ground. Four in five APAC-based travel buyers (78%) say their company's business travel bookings increased last year. This includes 30% who saw a significant increase – higher than any region.

Q. 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. **Note: Question only displayed to travel managers/procurement professionals**
***indicates small sample size for Latin America-based travel managers**

Regardless of Program Size, Business Travel Increased

How Did Your Company's Business Travel Volume Change Last Year?
by annual travel spend (in U.S. Dollars)



Business travel increases – at large programs and smaller ones. However, the smaller programs saw the biggest YOY volume increases.

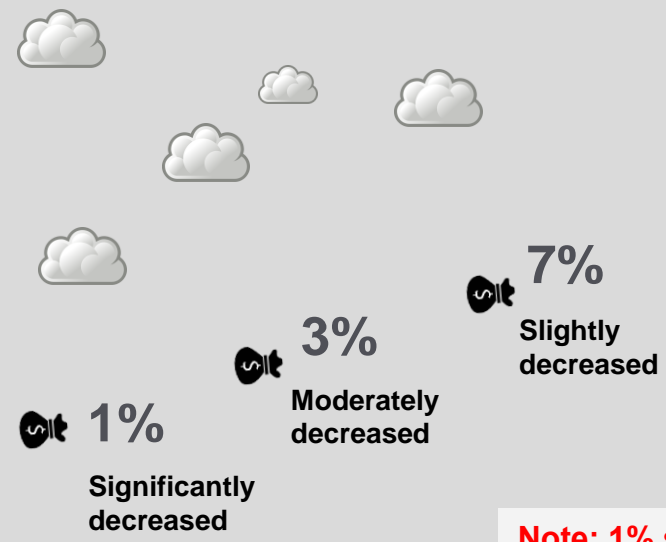
Three-quarters of travel managers (76%) who work at the smallest programs (less than \$10 million of annual spend) say their company's business travel volume increased last year. Fewer large programs (67%) saw an increase.

Q. 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. **Note: Question only displayed to travel managers/procurement professionals**

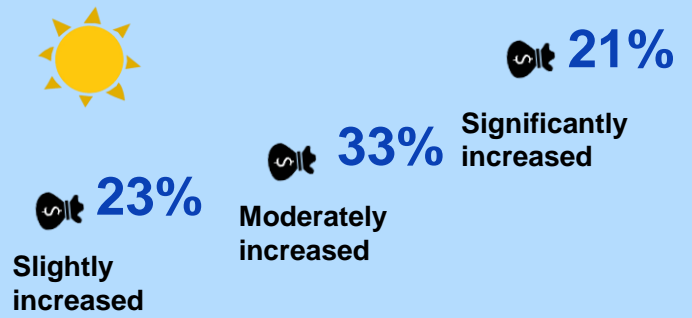
The **Travel Buyer's** Perspective: 2024 Spend

How Did Your Company's Business Travel SPEND Change Last Year? *travel managers only*

11%
say their company's spend decreased



77%
say their company's spend increased



11%
About the same/no change

Note: 1% say don't know/Not applicable

Travel spend outpaces volume.

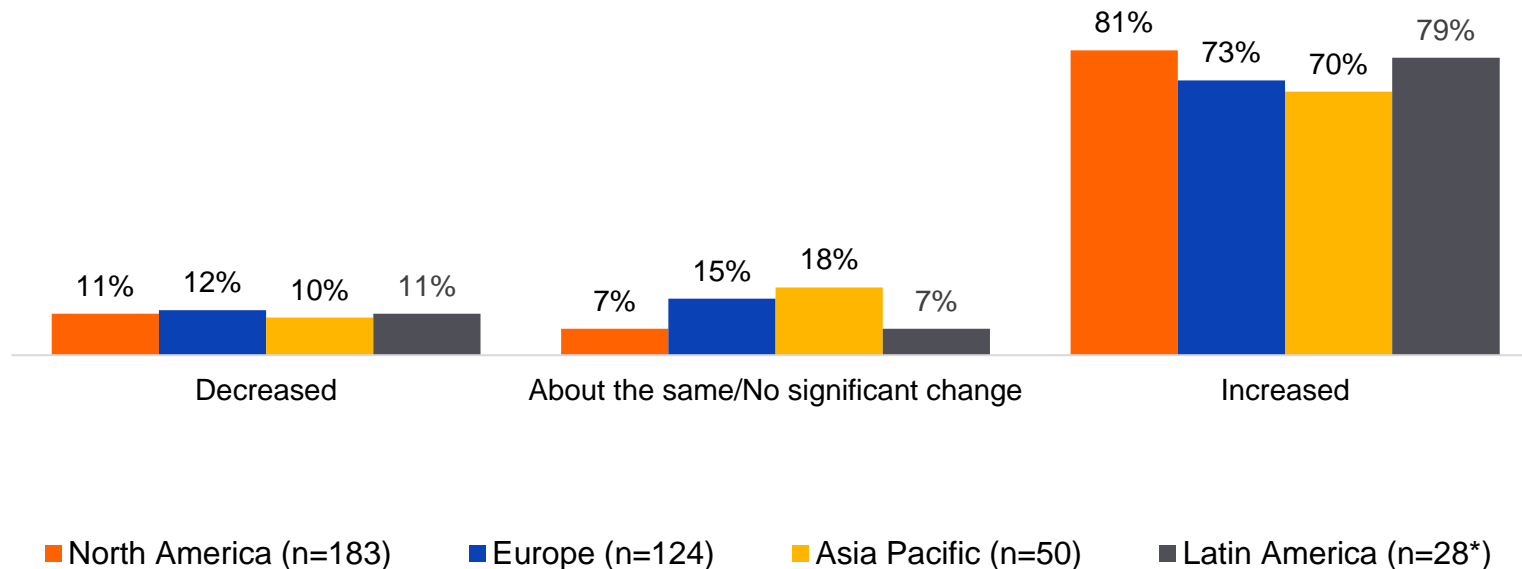
Four in five buyers (77%) say their company's travel *spend* increased last year. These increases outpace volume increases (71%). For instance, the share of buyers (21%) who saw a significant *spend* increase is larger than the share who saw a significant *volume* increase (18%).

This is not surprising as travel prices, while stabilizing, have maintained their high levels since registering large increases in the early years of the post-COVID recovery.

Budgets have taken longer to catch up to pricing realities.

Spend Increases Were Fairly Similar Across Regions

How Did Your Company's Business Travel Spend Change Last Year?
by region



Four in five buyers in North America (81%) say their company's travel spend increased last year.

That paces higher than the 74% in increased volumes YOY (see page 7).

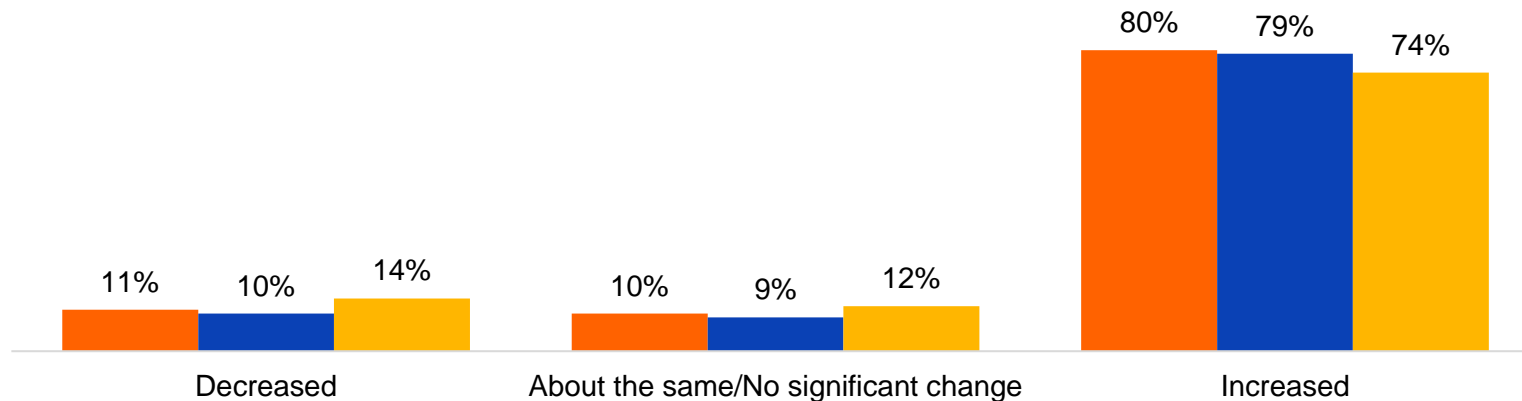
APAC is the one region which indicates they have higher volume increases (78%) than spend increases (70%), bucking the trend within all other regions.

Q. 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. **Note: Question only displayed to travel managers/procurement professionals**
***indicates small sample size in Latin America (n<30)**

The **Travel Buyer's** Perspective: 2024 Spend

Spend Increased – Regardless of Program Size

How Did Your Company's Business Travel Spend Change Last Year?
by annual travel spend (in U.S. Dollars)



■ Less than \$10 million (n=133) ■ \$10 million to less than \$30 million (n=98) ■ \$30 million or more (n=148)

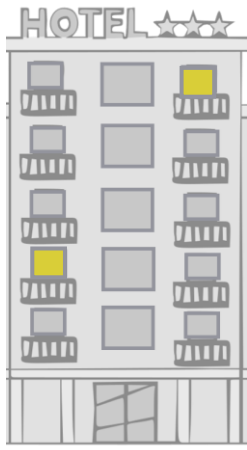
Travel programs of all sizes saw an increase in spend last year.

As with volume, the smaller programs were more likely than the largest programs to see spend increases YOY.

Q. 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. **Note: Question only displayed to travel managers/procurement professionals**

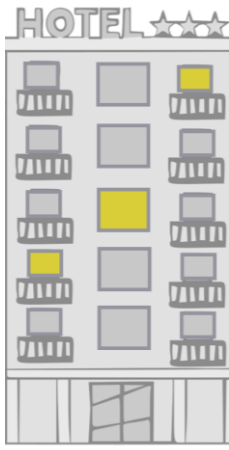
The **Travel Buyer's** Perspective: 2025 Volume

How will company's business travel volume change in 2025?
travel buyers only



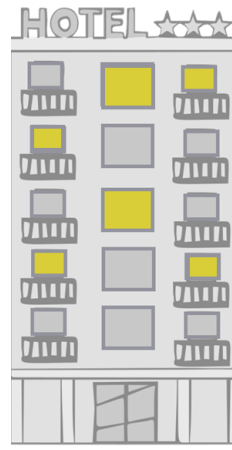
2%

We will likely take **a lot fewer** business trips (more than 20% fewer business trips compared to 2024)



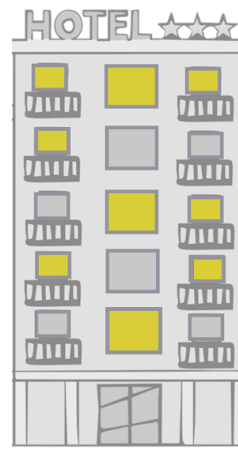
10%

We will likely take **fewer** business trips (1-20% fewer business trips compared to 2024)



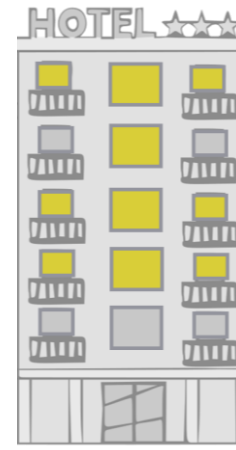
39%

We will likely take **about the same amount** of business trips



42%

We will likely take **more** business trips (1-20% additional business trips compared to 2024)



6%

We will likely take **a lot more** business trips (more than 20% additional business trips compared to 2024)

48%

expect their company will take more business trips this year

Note: 3% indicate "not sure"

Q. 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?

Note: Question only displayed to travel managers/procurement professionals (n=385)

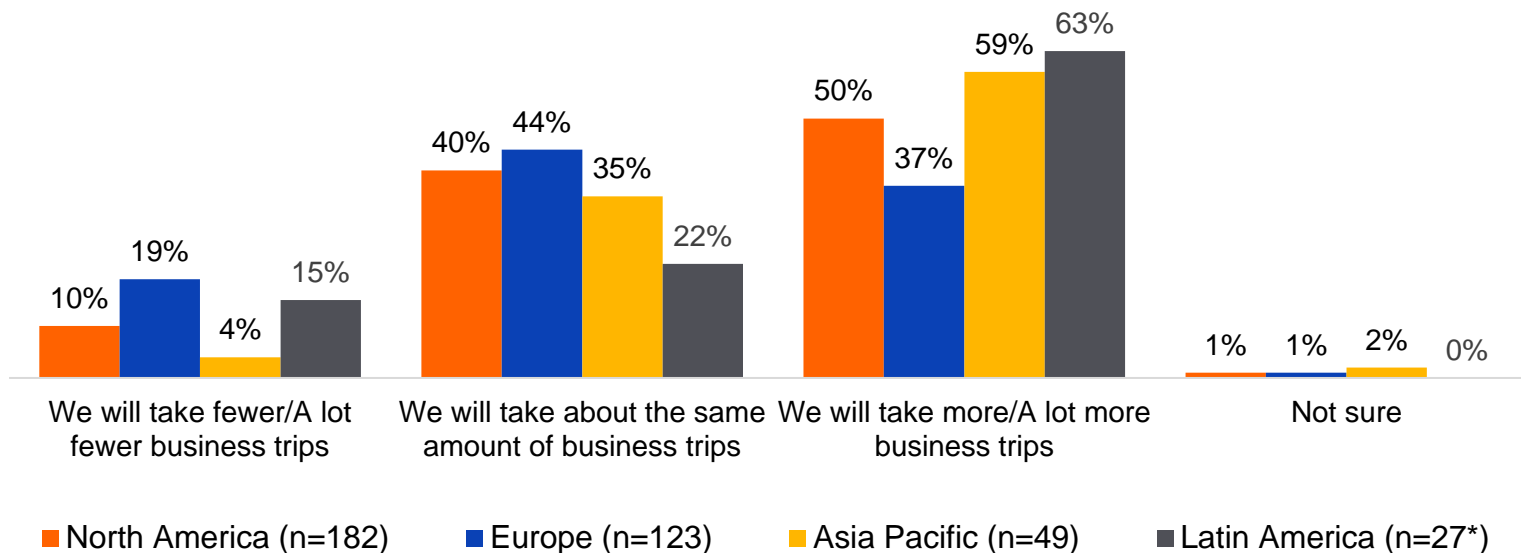
Buyers generally have a **positive outlook for the year ahead.**

Nearly half (48%) expect their company will take more business trips this year than it did last year. Only 12% expect their company will take fewer trips.

The **Travel Buyer's** Perspective: 2025 Volume

Europe-Based Buyers Have More Modest Expectations This Year Than Other Regions

How do buyers expect their company's business travel volume will change this year?
travel buyers by region



Q. 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?

Note: Question only displayed to travel managers/procurement professionals

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

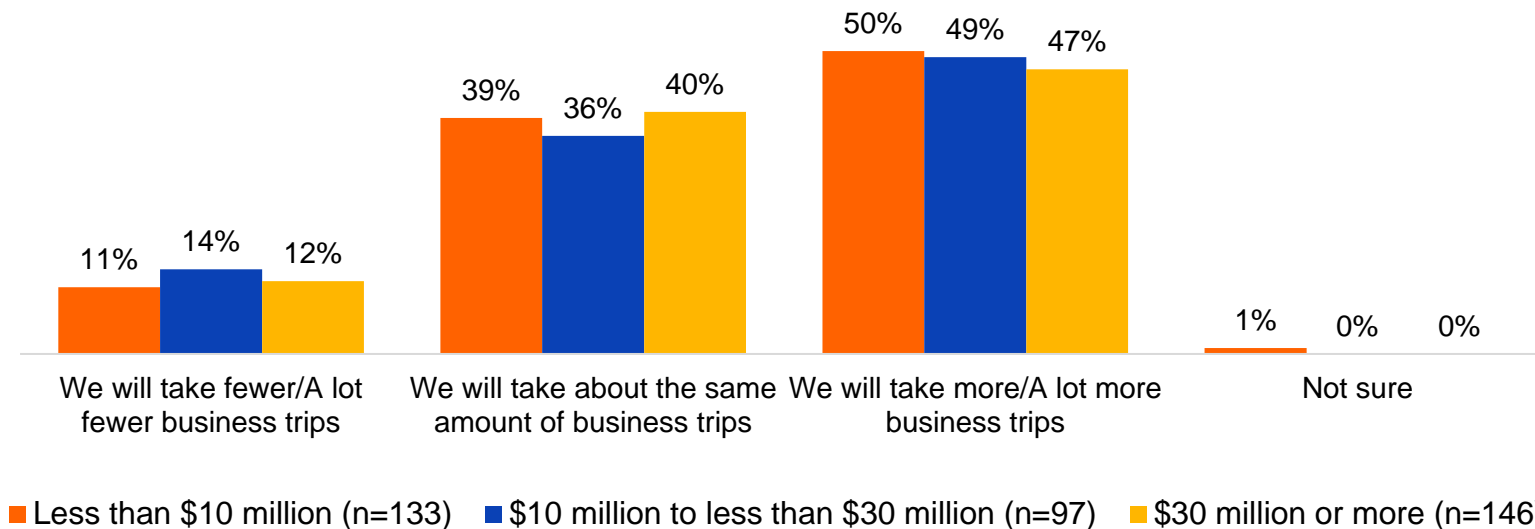
APAC leads in volume optimism, with 63% expecting more volume in 2025.

In Europe, buyers expect stable business travel volumes, but with less growth optimism than in the other regions.

While over one-third (37%) of Europe-based buyers expect their company will take more business trips this year, this is considerably lower than every other region. A fifth of Europe-based buyers (19%) expect their company's business travel volumes may decline YOY.

Regardless of Program Size, Buyers Expect More Business Travel

How do buyers expect their company's business travel volume will change this year?
by annual travel spend (in U.S. Dollars)



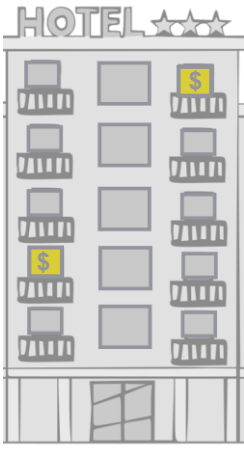
Q. Thinking about the anticipated VOLUME of business travel (i.e., number of trips) at your company for 2025, do you expect your company will engage in more or less business travel than it did in 2024?

Note: Question only displayed to travel managers/procurement professionals

Travel programs of all sizes expect to take more business trips this year.

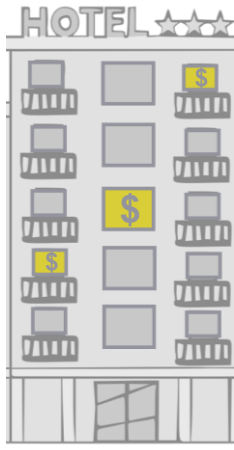
The **Travel Buyer's** Perspective: 2025 Spend

How will company's business travel spend change in 2025?
travel buyers only



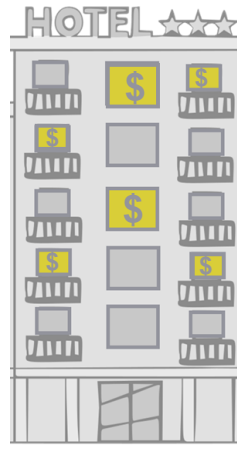
2%

We will likely spend **a lot less** on business travel (a decrease of 20% or more compared to 2024)



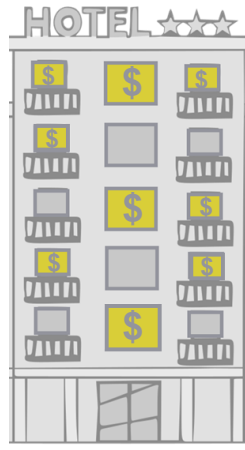
10%

We will likely spend **less** on business travel (1-20% decrease compared to 2024)



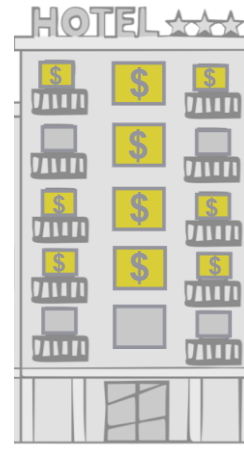
31%

We will likely spend **about the same amount** on business travel



51%

We will likely spend **more** on business travel (1-20% increase compared to 2024)



6%

We will likely spend **a lot more** on business travel (an increase of 20% or more compared to 2024)

57%

expect their company's business travel spend will be higher this year

Note: 3% say "don't know"

Q. 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?

Note: Question only displayed to travel managers/procurement professionals (n=378)

Travel programs expect to spend more on business travel in 2025 than they did in 2024.

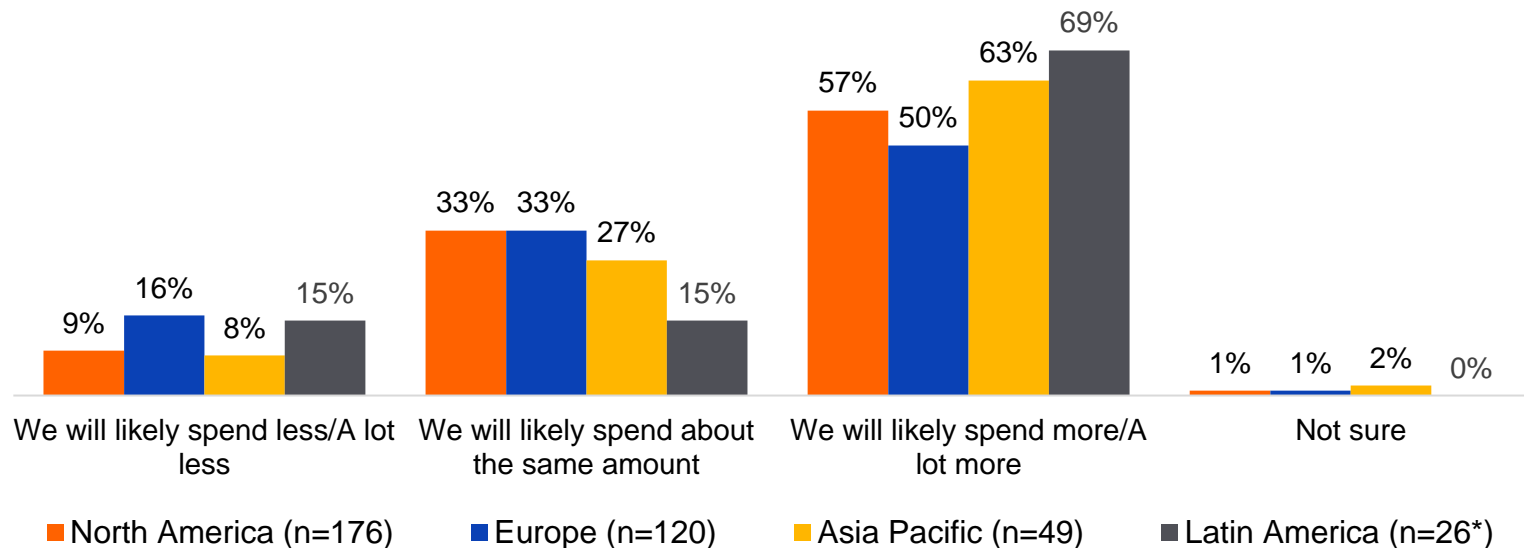
Almost three in five travel buyers (57%) expect their company's business travel spend will increase this year.

Consistent with 2024 results, this outpaces expectations for travel volumes' increasing.

The **Travel Buyer's** Perspective: 2025 Spend

Regions Consistently Expect Higher Spend in 2025

How will company's business travel spend change in 2025?
travel buyers by region



While still significant, compared to other regions, fewer buyers in Europe expect higher spend in 2025.

This is consistent with Europe's lower expectation of volumes increasing YOY this year.

Half of Europe-based buyers (50%) expect their company's business travel spend will increase this year, compared to 63% of those in APAC and 57% of those in North America.

Q. 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?

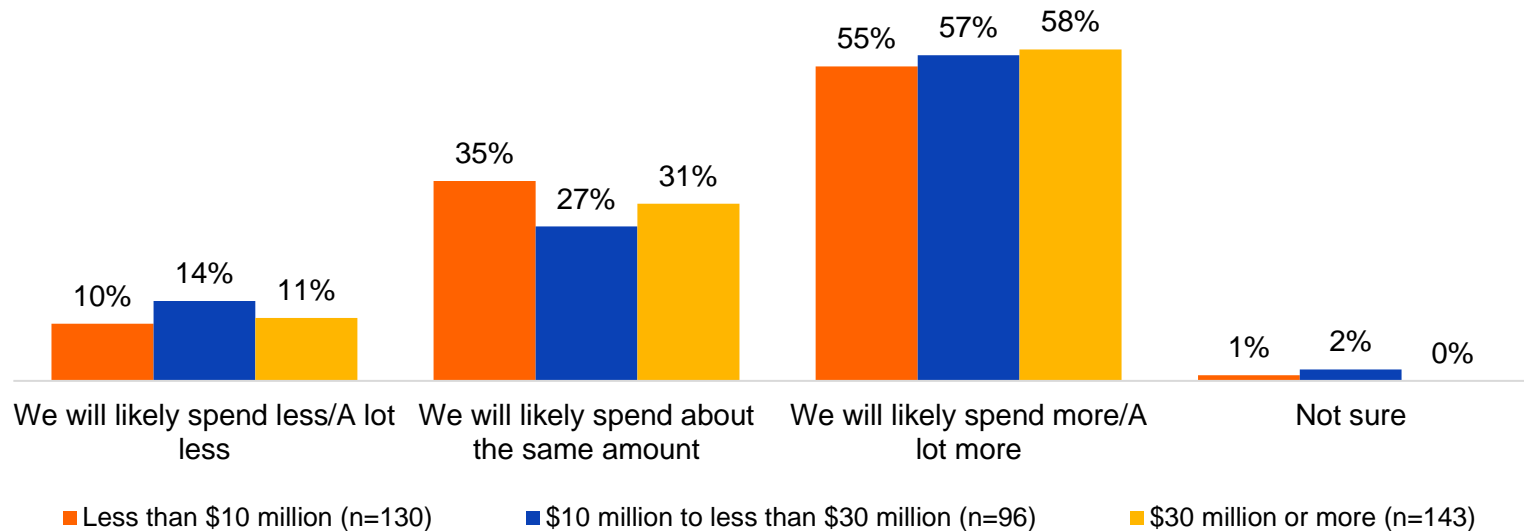
Note: Question only displayed to travel managers/procurement professionals

***indicates small sample size for Latin America-based travel managers (n<30)**

The **Travel Buyer's** Perspective: 2025 Spend

Programs of All Sizes Expect to Spend More on Business Travel

How will company's business travel spend change in 2025?
by annual travel spend (in U.S. Dollars)



Travel programs of all sizes expect to spend more on business travel this year.

There is little variance among small, medium and large programs.

Q. 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?

Note: Question only displayed to travel managers/procurement professionals

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

The **Travel Buyer's** Perspective: Trip Purpose

Sales Travel Leads, While Internal Meetings and Conference Travel Holds Steady

Approximately what percentage of travel spend will be allocated to each of the following types of trips in 2025?

Averages calculated from open-end responses

 **27%**

Sales/account management meetings with current or prospective customers

 **21%**

Internal company meetings with colleagues

 **14%**

External Conferences, trade shows, or industry events

 **13%**

Service trips (such as repairs, training or equipment installation) with current customers

 **9%**

Employee training or development

 **8%**

Supplier meetings

Other 7%

Two years ago, event and conference travel regained momentum. This year, it is expected to hold steady.

On average, buyers expect their company will allocate 14% of its travel spend to external conferences and trade shows this year. This is roughly unchanged from their expectations last year (15%).

In addition, internal company meetings remain resilient. On average, buyers expect these will account for 21% of their company's travel spend this year – similar to last year (20%).

Note: Last year's estimate is from GBTA's [January 2024, Business Travel Outlook Poll](#).

Q. Approximately what percentage of travel spend will be allocated to each of the following types of trips in 2025?

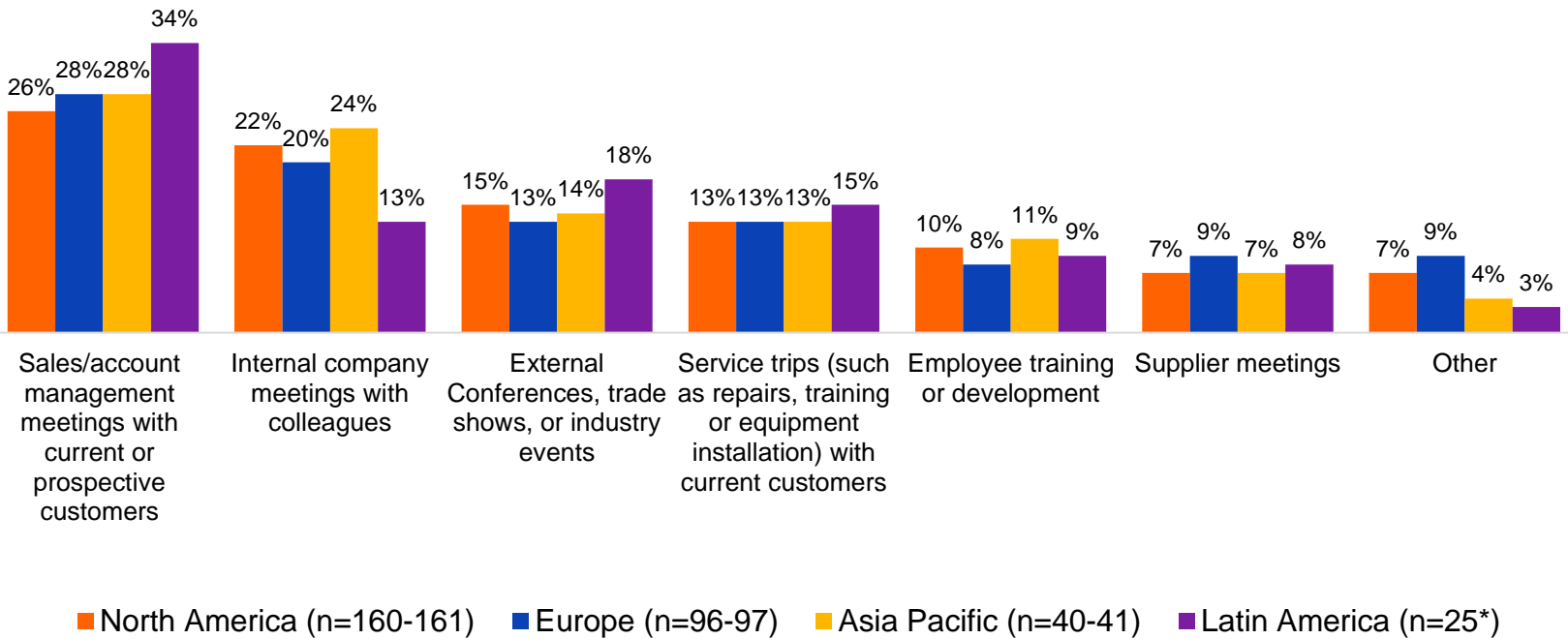
For each box, please enter a percentage. Your best estimate is fine. If you don't know, please enter "DK" or "don't know"

Note: Results filtered to only show travel buyers/procurement professionals (n=188)

The **Travel Buyer's** Perspective: Trip Purpose

There Are Few Regional Differences When It Comes to the Mix of Trip “Types”

Approximately what percentage of travel spend will be allocated to each of the following types of trips in 2025?
averages by region



There are only minor regional differences when it comes to the mix of trip “types.”

General rank of trip types remains largely the same regardless of region.

Q. 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?

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

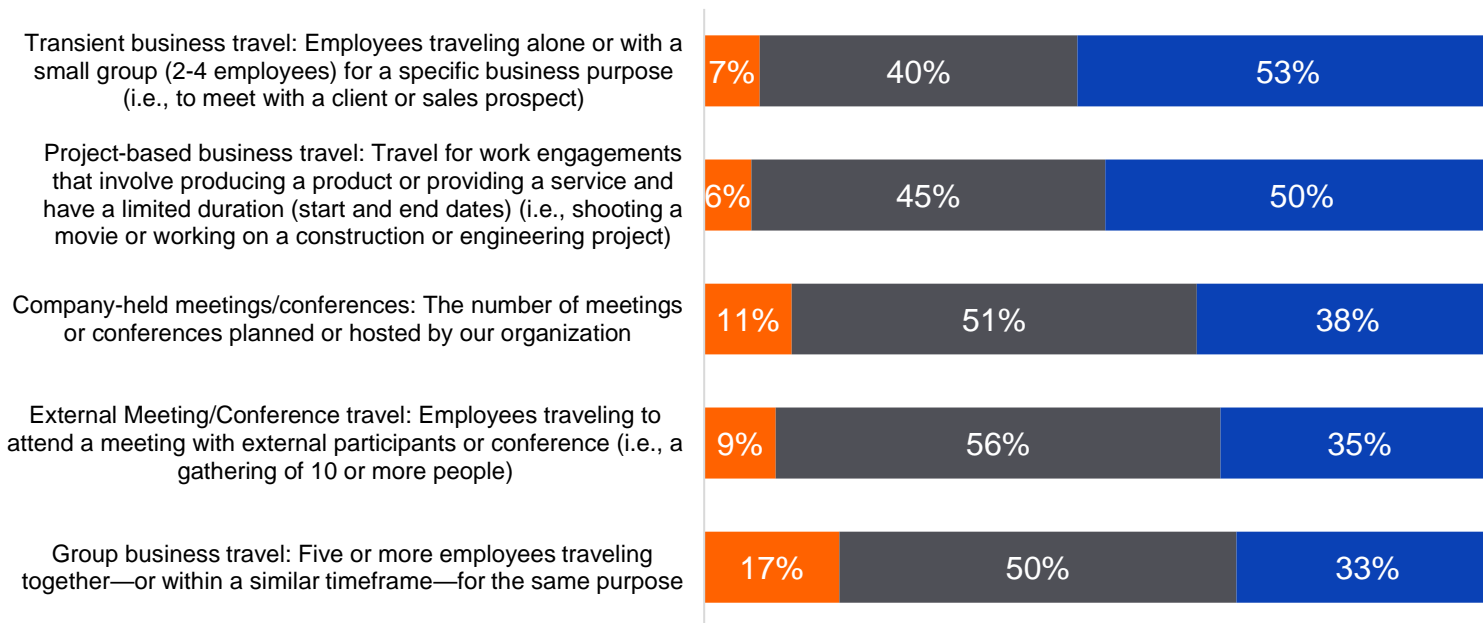
The **Travel Buyer's** Perspective: Trip Purpose

Transient and Project Trips Are Expected to Outpace Group and Conference trips

Looking ahead at 2025, how do you expect the following will change at your organization compared to 2024?

buyers only

■ Decrease somewhat/significantly ■ Remain the same ■ Increase significantly/Somewhat significantly



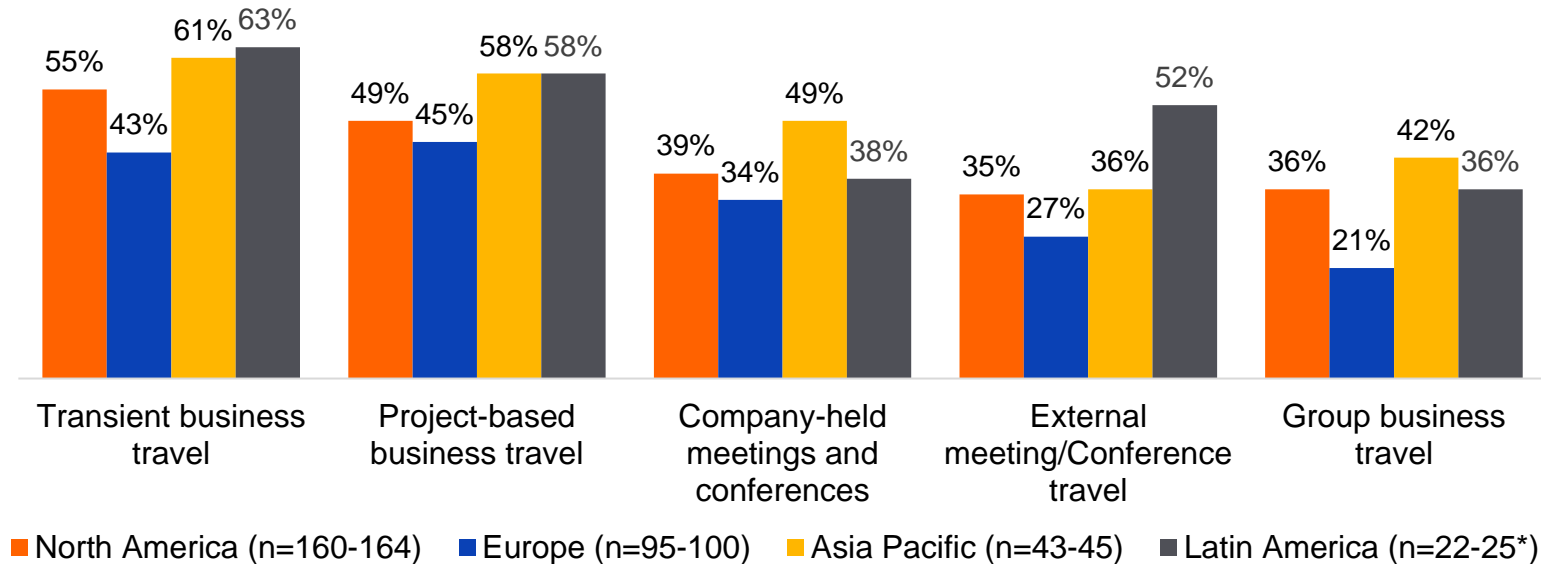
Transient and project trips are expected to lead the way this year.

Over half of buyers (53%) expect their company's employees will take more transient trips this year while exactly half (50%) expect employees will take more project trips.

The **Travel Buyer's** Perspective: Trip Purpose

Transient and Project Business Travel Expected Increases Across the World

Looking ahead at 2025, how do you expect the following will change at your organization compared to 2024?
% increase by region



Across the world, buyers expect transient trips and project-related trips to continue growing the fastest.

All trip types show strong growth expectations across all regions – with Europe still strong but the most muted in terms of growth expectations.

Q. Looking ahead at 2025, how do you expect the following will change at your organization compared to 2024?

Note: Question only displayed to travel managers/procurement professionals

***indicates small sample size for Latin America-based travel managers (n<30)**

What do you predict will be the most significant issues faced by business travel in 2025?

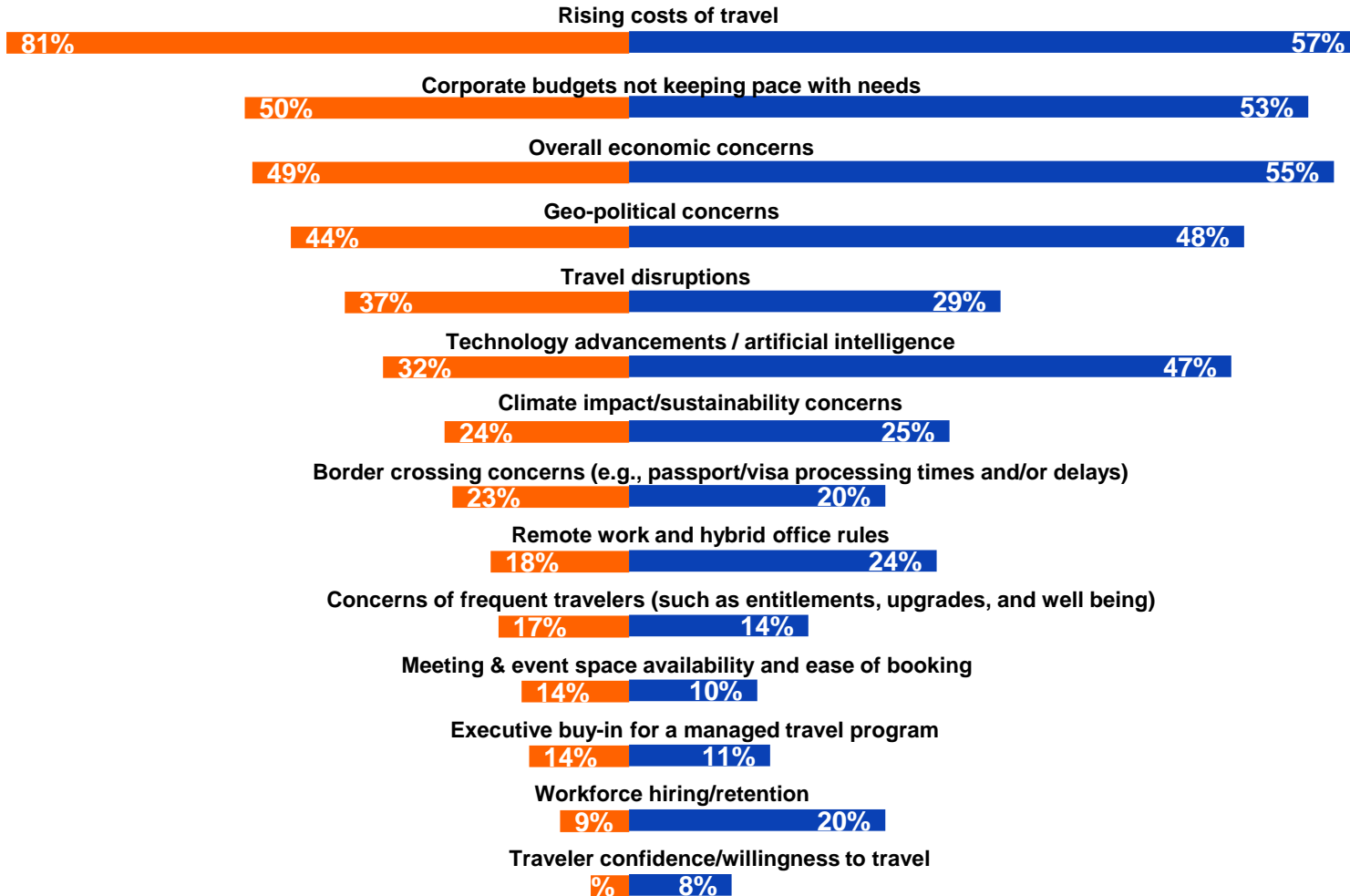
% included in top 5 (out of 14 possible)



travel buyers
(n=339)



travel suppliers/TMCs
(n=272)



A new year dawns for the business travel industry – with new issues and challenges.

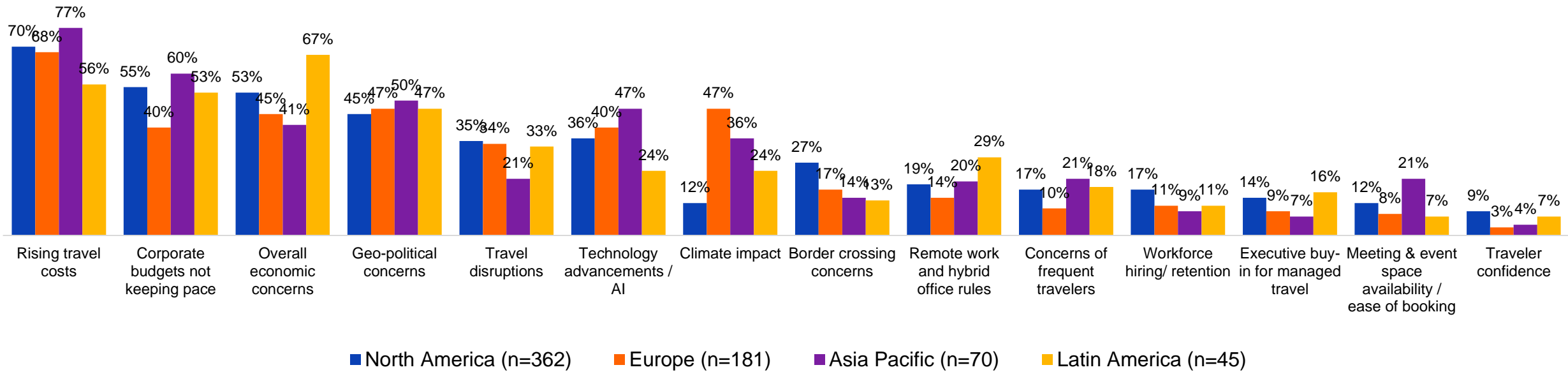
Even as travel costs remain somewhat steady, they are still *perceived* to be increasing. Four in five buyers (81%) expect rising travel costs will be one of five most significant issues faced by the industry this year.

AI and tech is a much more significant issue for suppliers than buyers. A fair number of buyers (22%) and suppliers (20%) expect border crossing concerns will be one of the top five issues. Yet, climate and sustainability concerns beat border crossing concerns for both buyers and suppliers.

Q. What do you predict will be the most significant issues faced by business travel in 2025? **SELECT AND RANK YOUR TOP 3**
Note: Some response options shortened or paraphrased for brevity. Full text displayed to respondents can be found in the “Poll Results” document

There Are Some Regional Differences When It Comes to Perceived Issues Facing Business Travel This Year

What do you predict will be the most significant issues faced by business travel in 2025?
% included in top 3 by region



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



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Travel Program Initiatives



Travel program initiatives

Travel managers have varied responsibilities. Some are “routine.” Examples include hotel RFPs, supplier account reviews, and traveler communication. Travel managers carry out these responsibilities on a regular basis – daily, annually, or monthly.

Travel programs also pursue **larger strategic initiatives**. These happen less often but are critically important. Examples include overhauling a company’s travel policy, changing Travel Management Companies (TMCs), and adopting new technology. Which strategic initiatives do travel programs have planned for 2025?

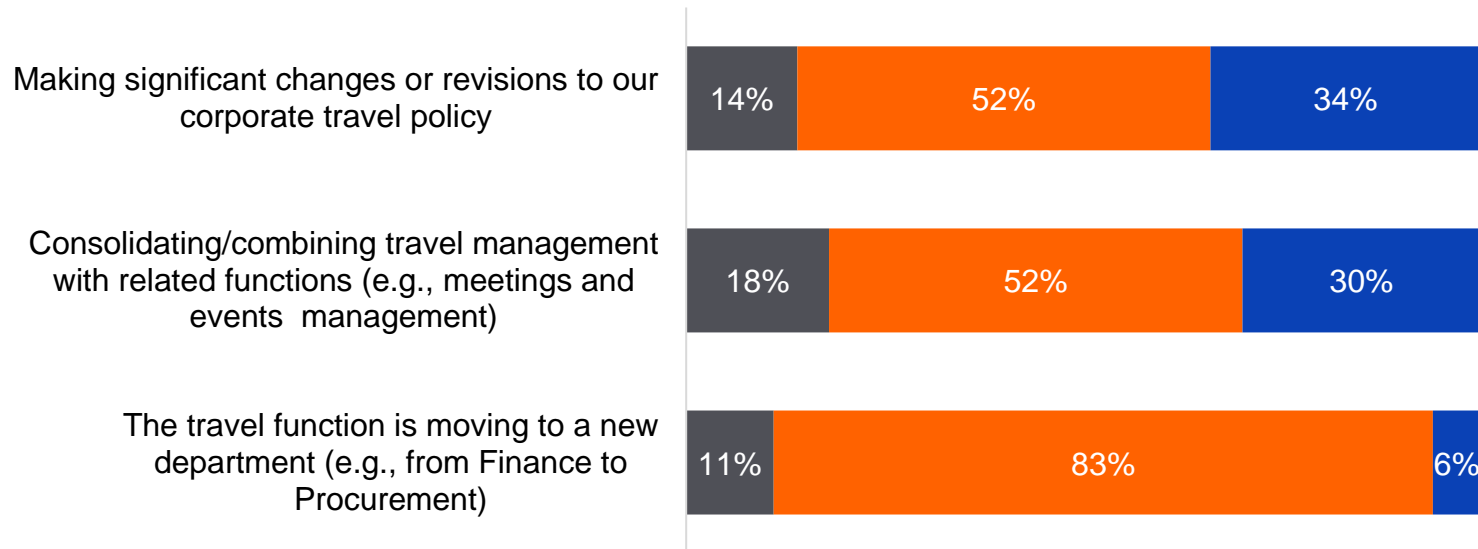


Travel Program Design/Strategy

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?

buyers only

■ Not sure ■ No ■ Yes



Q. Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?

Note: Question only displayed to travel managers/procurement professionals (n=344-347)

A third of buyers are considering significant program design changes, including policy and internal consolidation.

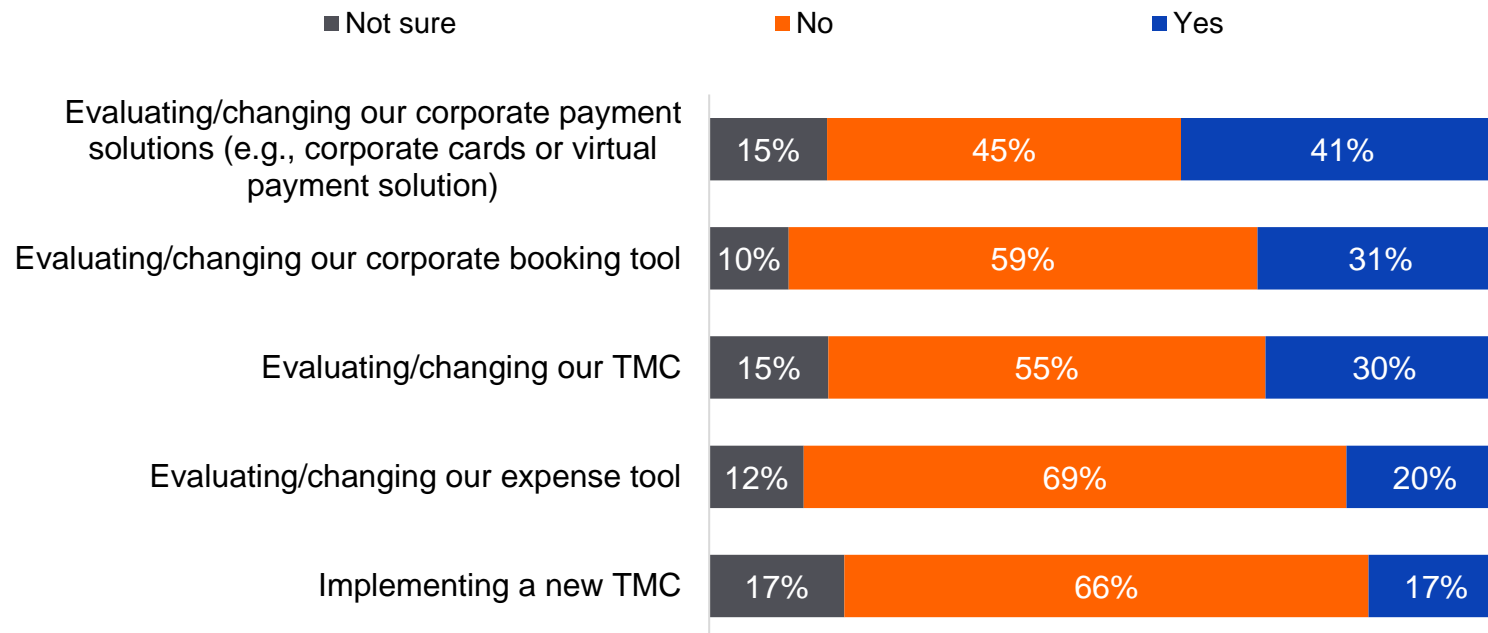
Consolidating travel management with related functions can drive efficiency and savings.

For instance, a “combined” travel and meetings program can achieve greater savings by leveraging travel and meetings spend in negotiations with hotels. This can also drive process efficiencies. For example, companies can conduct account reviews with hotels and discuss travel and meetings at the same time.

Are “combined” programs on the rise? A fair number of buyers (30%) expect their company will consolidate travel management with a related function this year.

Payments/Tech/TMC Changes

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025? (cont.)
buyers only



Q. Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?

Note: Question only displayed to travel managers/procurement professionals (n=344)

Payment and online booking solutions are receiving the most attention in 2025.

Yet, a close third, the TMC landscape remains unsettled.

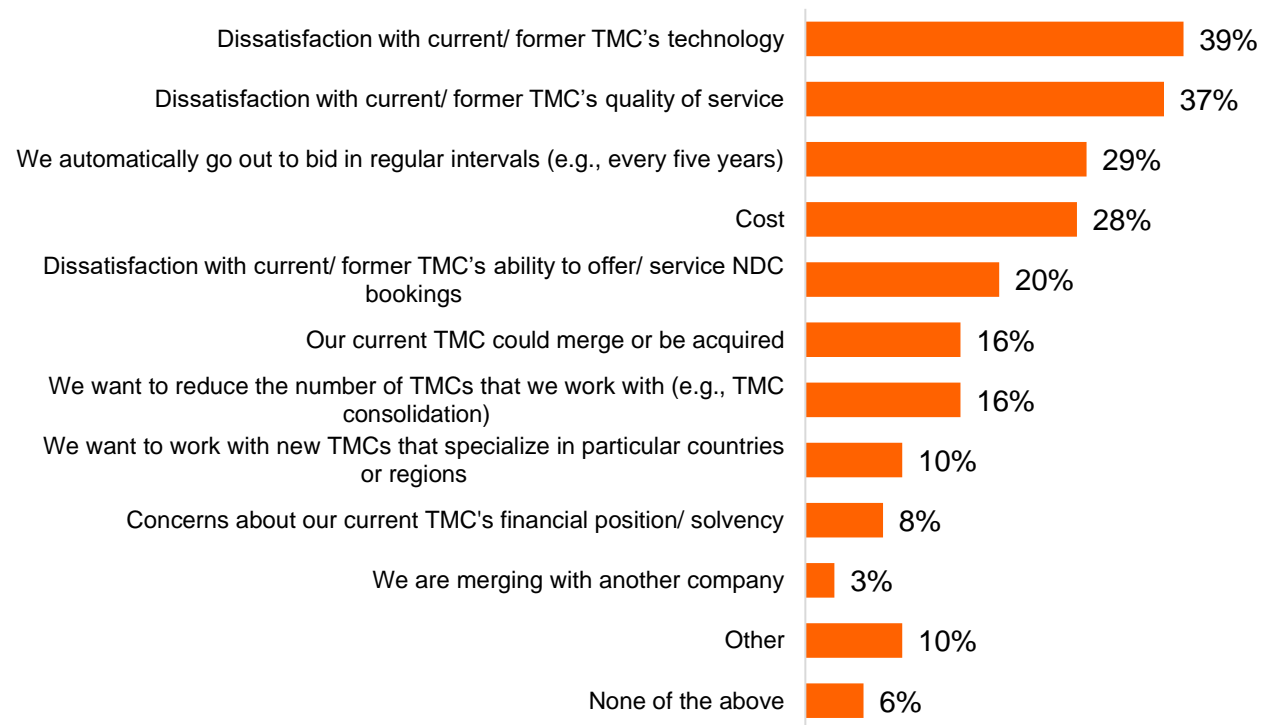
A major TMC acquisition is facing regulatory scrutiny and legal challenges. There remain concerns about the financial solvency of TMCs – and their ability to make needed technology investments at scale.

Is uncertainty forcing buyers to act? A fairly significant number of travel buyers (30%) say their company is evaluating or changing its TMC this year. Almost one in five (17%) expect to implement a new TMC this year. Buyers cite a number of reasons for considering—or making—a change. These are shown on the next page.

Technology and Service Key Reasons for Considering a TMC Switch

Why are some companies considering changing TMCs?

multiple answers allowed



Q. 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.

Note: Question only displayed to travel managers/procurement professionals (n=109)

Technology is the top reason for considering a TMC switch.

Of the buyers who expect their company will evaluate or change TMCs – or implement a new TMC – two in five (39%) mention technology as a reason. This is higher than other practical reasons such as cost (38%).

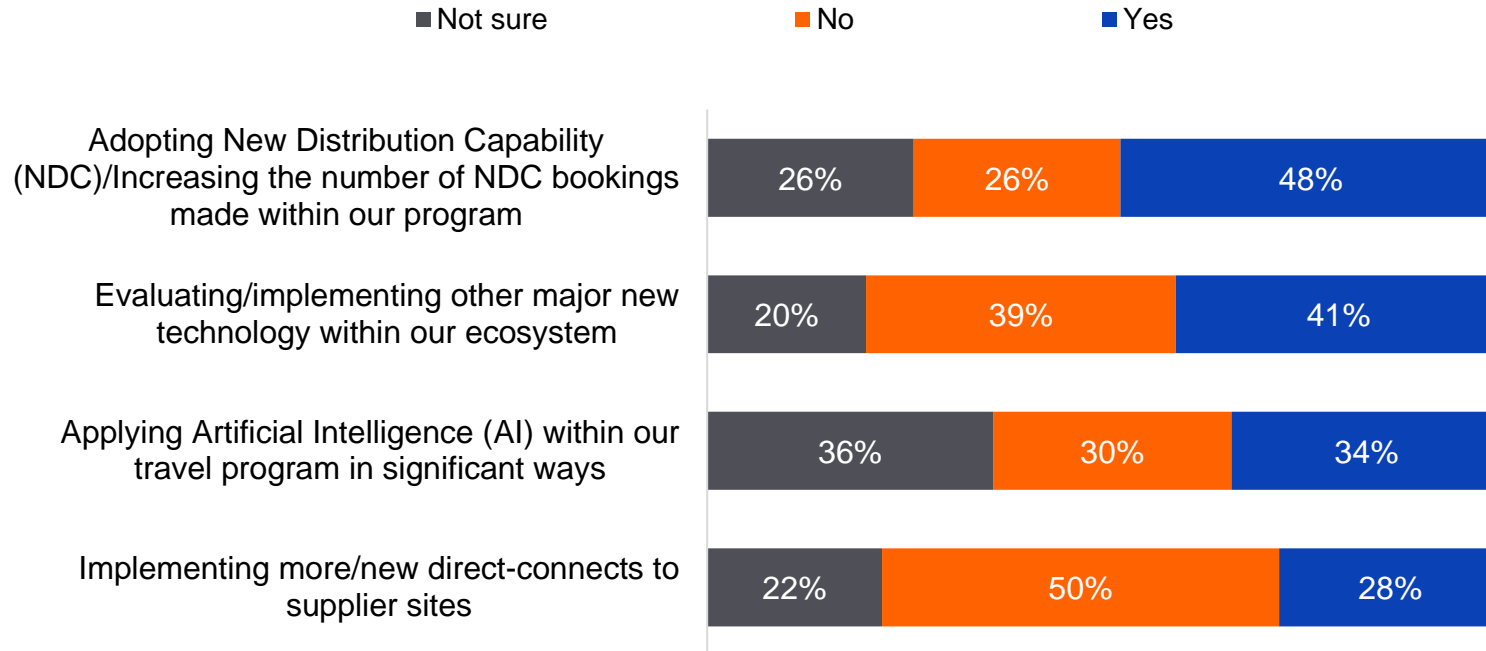
One in five (20%) mention their TMC's difficulty with NDC.

Some (16%) mention the prospect of their TMC merging or being acquired.

Technology and Distribution

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025? (cont.)

buyers only



Travel programs are slow to embrace Artificial Intelligence (AI).

Only about one-third of buyers (34%) expect their program will apply AI in significant ways this year.

But, NDC appears to be gaining traction. Almost half (48%) expect their program will adopt New Distribution Capability (NDC) or increase the number of NDC bookings made this year.

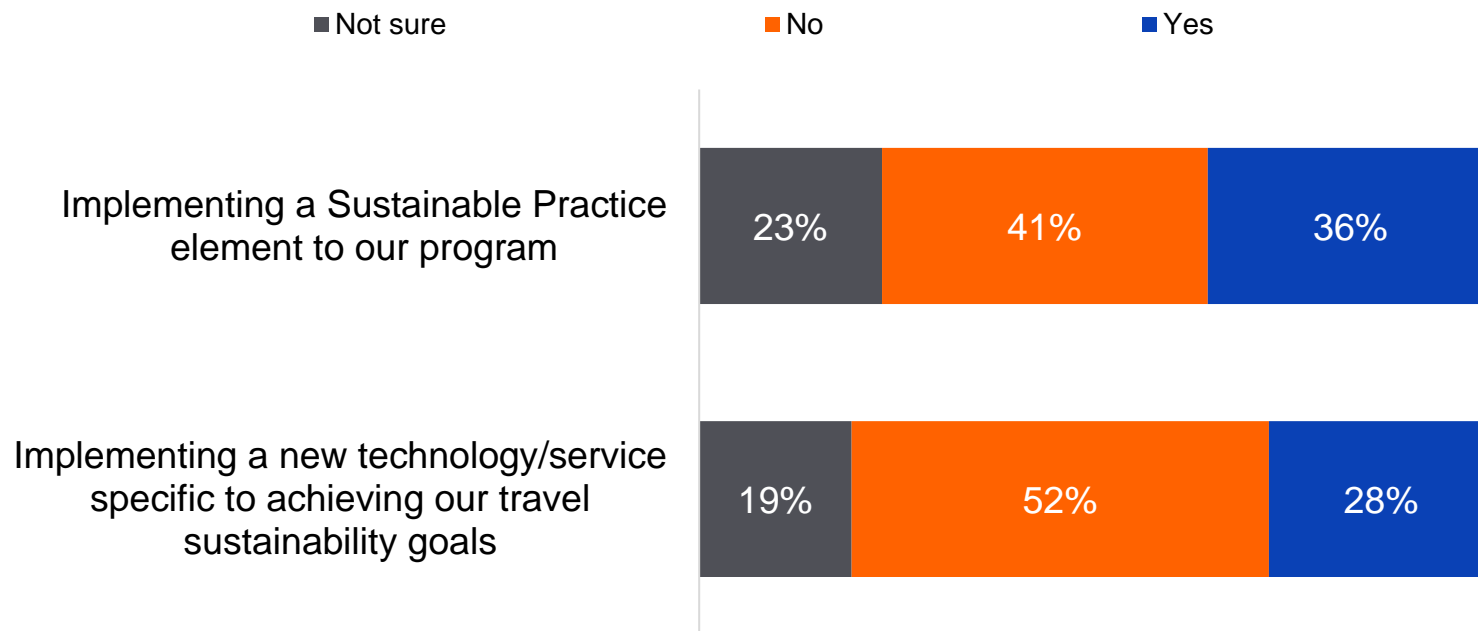
Q. Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?

Note: Question only displayed to travel managers/procurement professionals (n=342-346)

Sustainability

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025? (cont.)

buyers only



Travel programs continue to reduce emissions– in an effort to meet carbon reduction targets.

As they continue their journey, they are relying heavily on technology and special service providers. These help them track carbon emissions, purchase carbon offsets or Sustainable Aviation Fuel (SAF), and manage internal carbon pricing/tax schemes, among other functions.

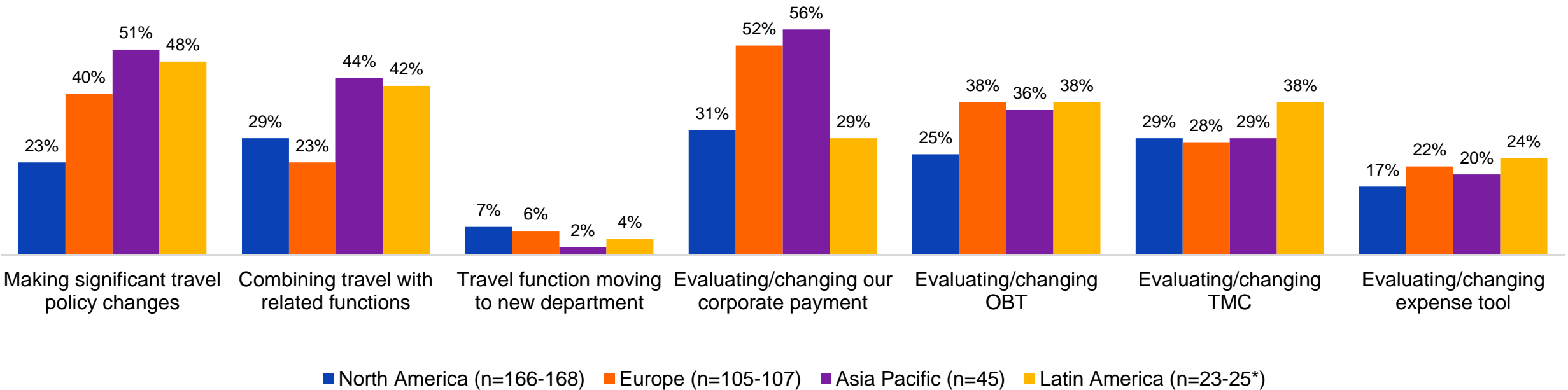
This year, more than one-quarter of buyers (28%) expect their program to pursue a new technology or service specific to achieving its sustainability goals.

Q. Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?

Note: Question only displayed to travel managers/procurement professionals (n=343-344)

Travel Program Initiatives: Some Regional Variation

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?
% "yes" by region

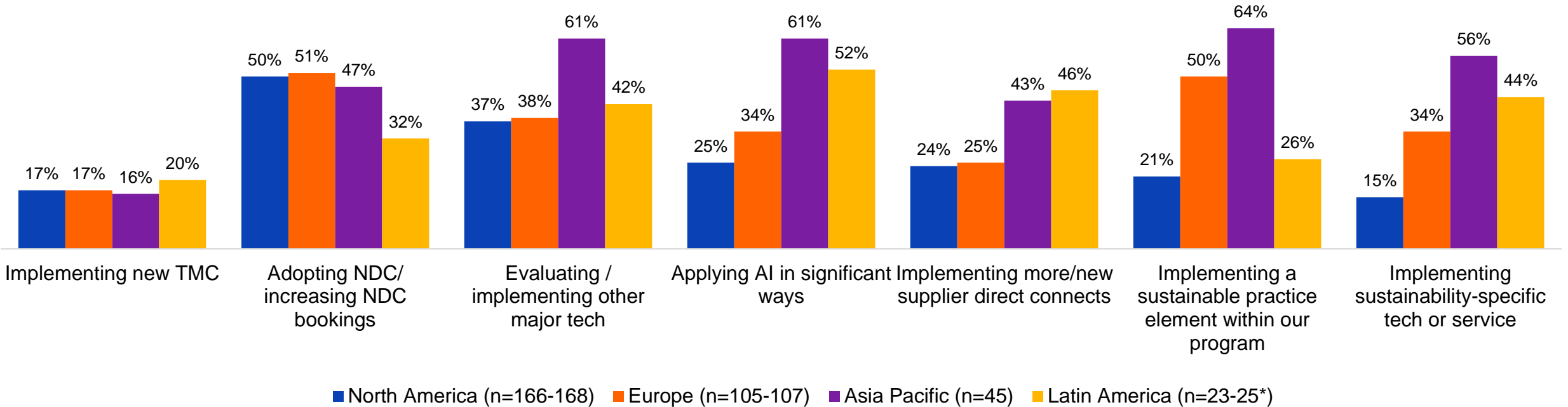


Q. What do you predict will be the most significant issues faced by business travel in 2025? **Please select up to five.**
*indicates small sample size for Asia Pacific and Latin America

Travel Program Initiatives by Region (Cont.)

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025? (cont.)

% "yes" by region

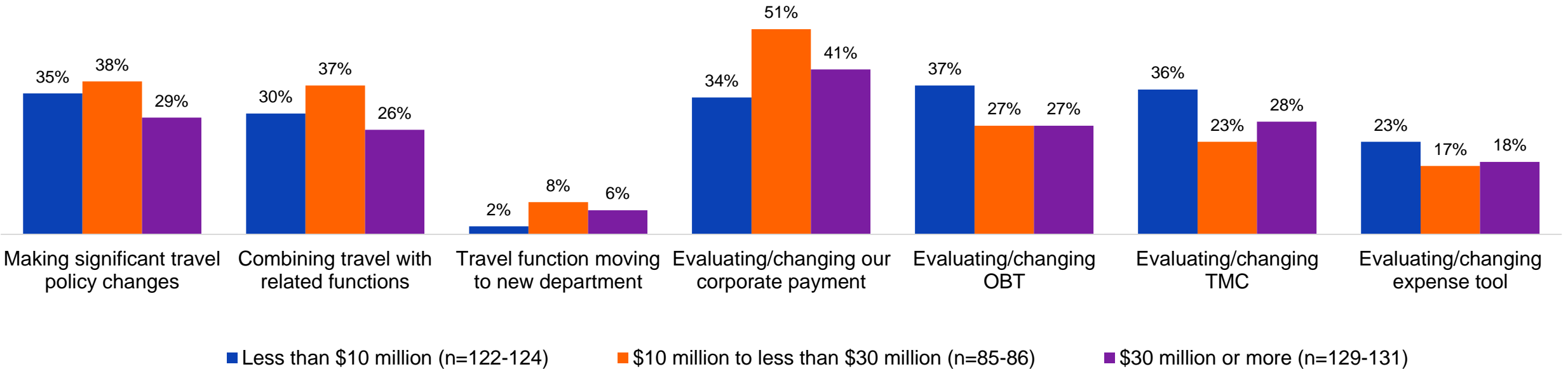


Q. What do you predict will be the most significant issues faced by business travel in 2025? **Please select up to five.**

*indicates small sample size for Asia Pacific and Latin America

Travel Program Initiatives by Program Size

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025?
 % "yes" by annual travel spend (in U.S. Dollars)

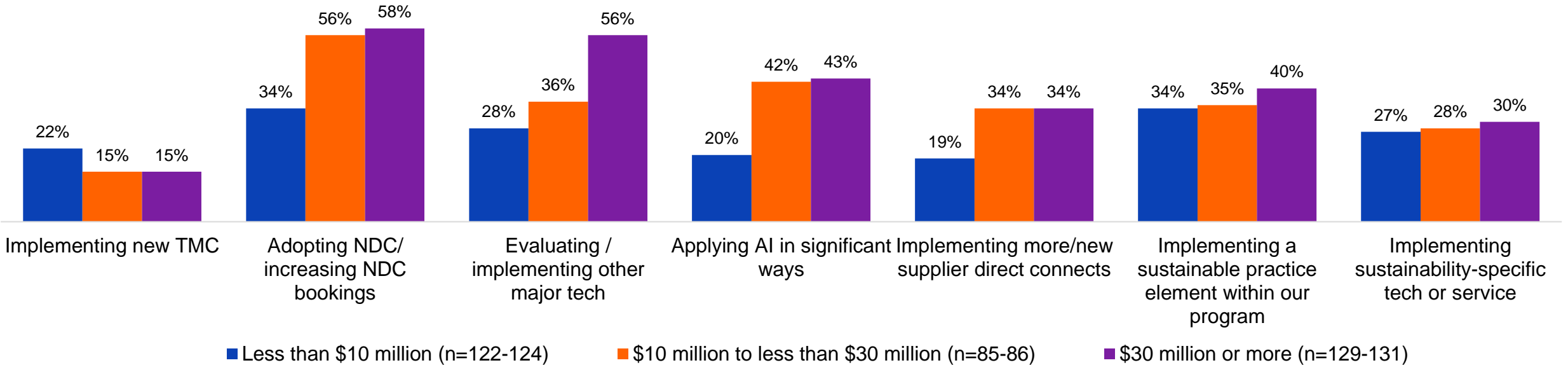


Q. What do you predict will be the most significant issues faced by business travel in 2025? **Please select up to five.**
 *indicates small sample size for Asia Pacific and Latin America

Travel Program Initiatives by Program Size (Cont.)

Thinking about your corporate travel program, do you expect to pursue the following strategic initiatives in 2025? (cont.)

% "yes" by annual travel spend (in U.S. Dollars)



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

***indicates small sample size for Asia Pacific and Latin America**



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Staffing and Work Policies

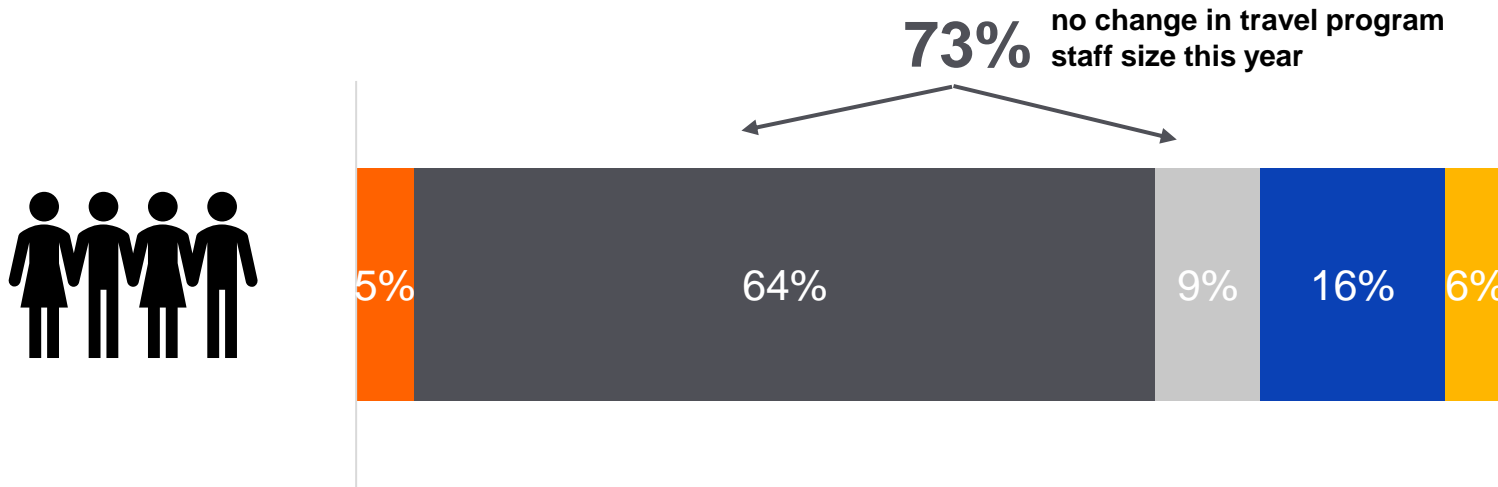


The **Travel Buyer's** Perspective

Few Travel Programs Expect to Add Staff This Year

Do you expect the staffing level of your internal travel program team to increase in 2025?

- I expect staffing level to decrease
- I expect no change
- No change on my team, but we are partnering more with internal teams
- I expect staffing level to increase
- Don't know/Not applicable



Even as business travel increases, *travel programs* remain cautious about adding staff.

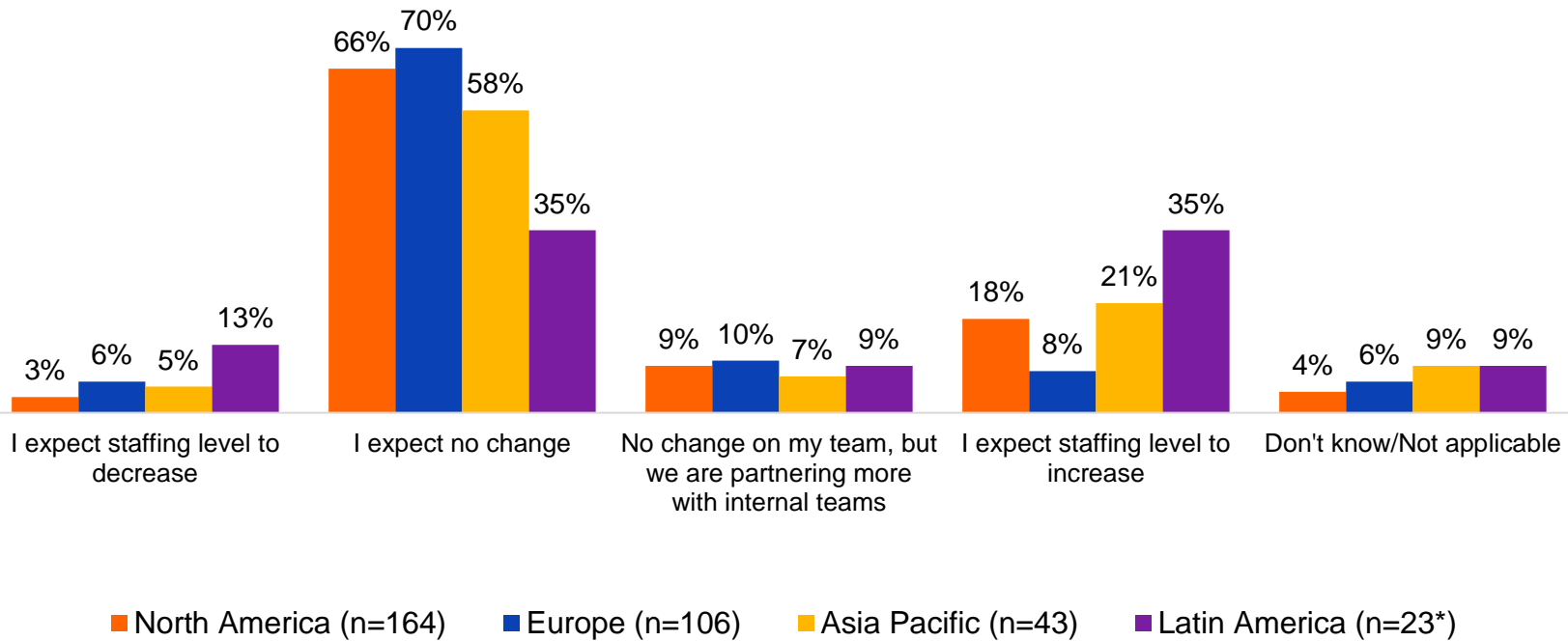
Only 16% of buyers expect their travel program's staff size will increase this year.

Q. Do you expect the staffing level of your internal travel program team to increase in 2025?

Note: Question only displayed to travel buyers/procurement professionals (n=338)

Is Latin America Filling More Travel Manager Roles?

Do you expect the staffing level of your internal travel program team to increase in 2025?
by region



Latin America-based buyers are more likely to expect their travel program's staff size will increase this year.

Q. Do you expect the staffing level of your internal travel program team to increase in 2025?

Note: Question only displayed to travel buyers/procurement professionals

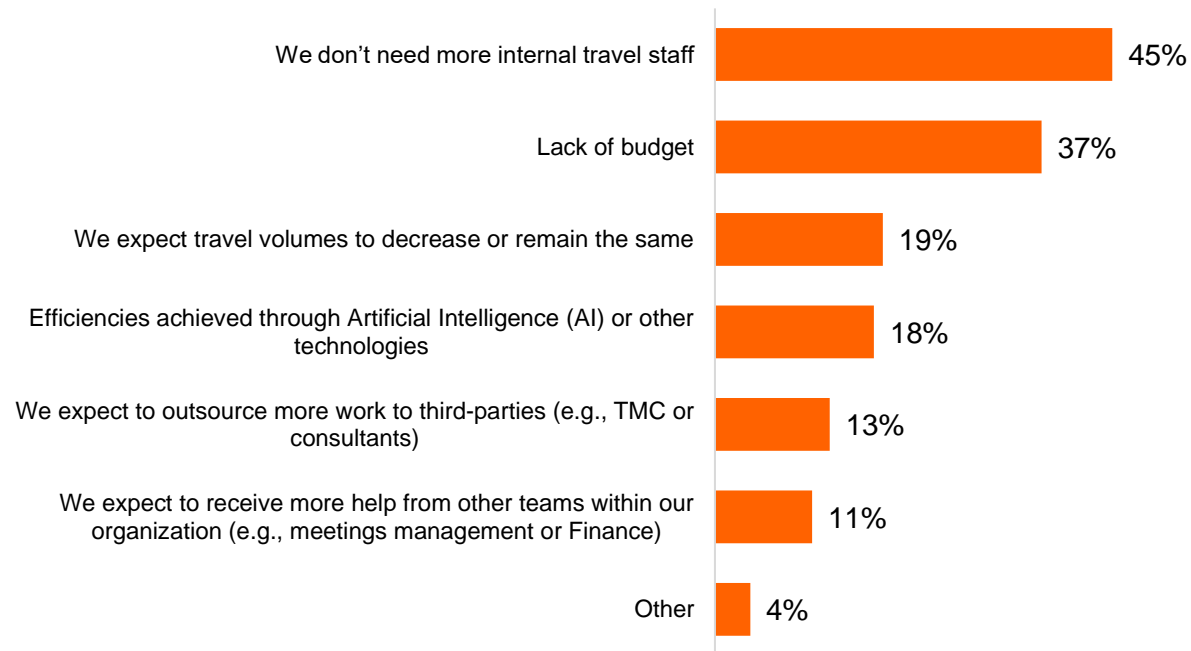
*indicates small sample size (n<30) in Latin America

The **Travel Buyer's** Perspective

There Are Various Reasons Why Travel Programs Will Not Add Staff

Why are travel programs *not* adding full-time staff this year?

Among buyers who expect their program's staff size will remain the same or decrease (multiple answers allowed)



Q. 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

Note: Question only displayed to travel buyers/procurement professionals who do not expect their program will increase staff this year (n=262)

Most travel buyers do not expect their program will add additional staff this year.

When we asked why, the most common reasons are conventional. Almost half of buyers (45%) say their program doesn't need more staff. More than one-third (37%) cite a lack of budget.

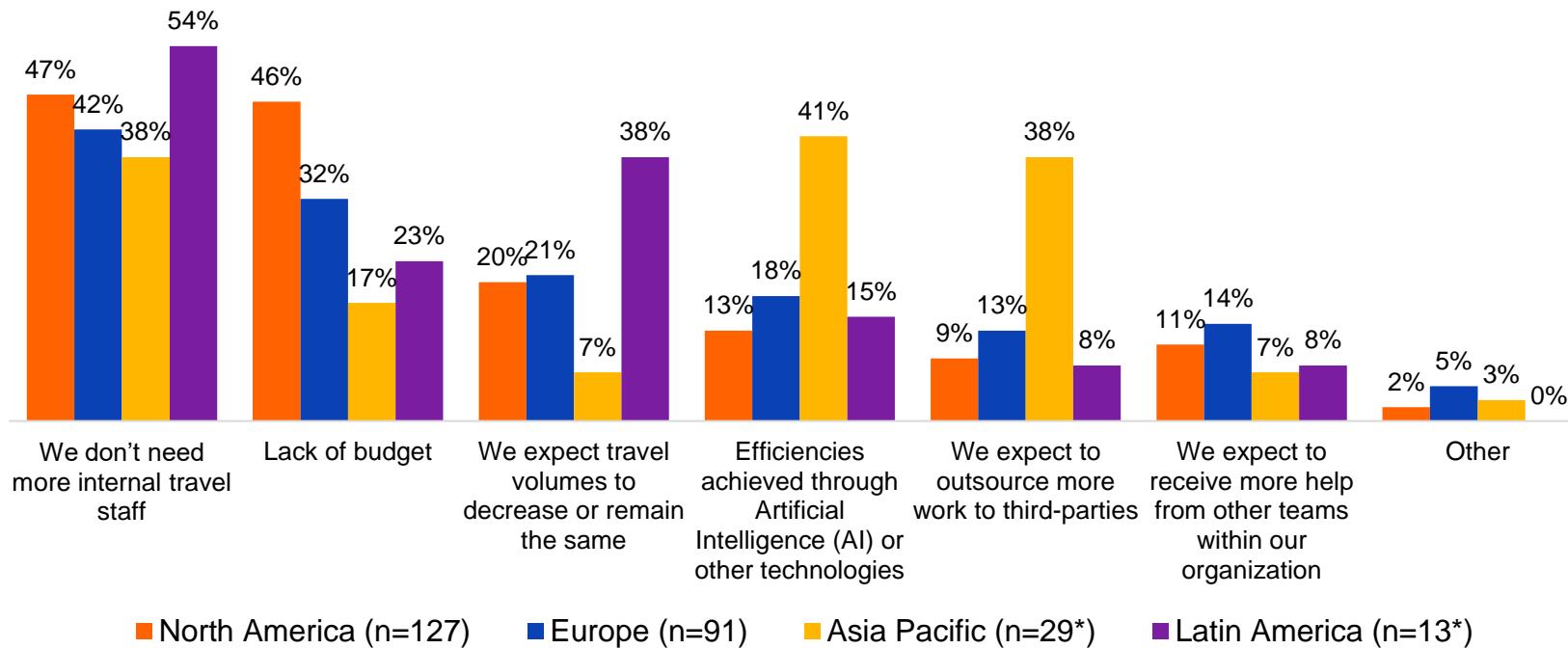
However, almost one in five (18%) mention efficiencies achieved through AI or other technologies as a reason.

The Travel Buyer's Perspective

Are Travel Program Budgets Tighter in North America?

Why are travel programs *not* adding more internal staff this year?

by region (among buyers who expect their program's staff size will remain the same or decrease)



In North America, budgets are a common reason why travel programs are not adding staff.

Of the North America-based buyers who say their program will not add more staff, almost half (46%) mention *lack of budget* as a reason. This is considerably higher than in any other region.

Q. 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

Note: Question only displayed to travel buyers/procurement professionals who do not expect their program will increase staff this year.

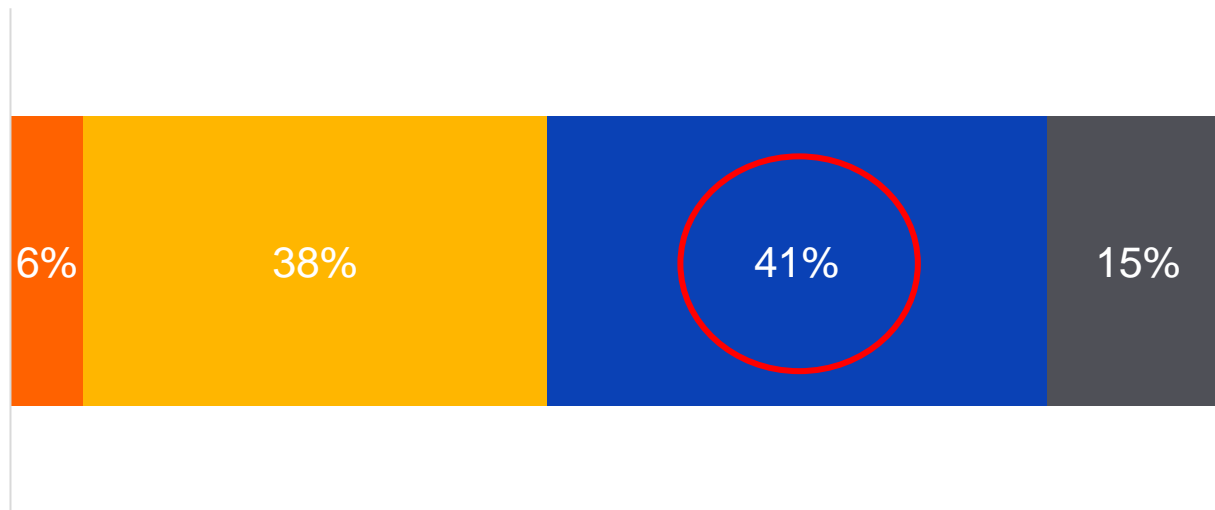
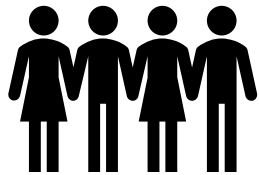
***indicates small sample size in Asia Pacific and Latin America (n<30)**

The **Travel Supplier/TMC's** Perspective

Travel Suppliers Continue to Re-Staff

Do you expect the staffing level of your overall company to increase in 2025?
travel supplier/TMC professionals only

■ I expect staffing level to decrease ■ I expect no change ■ I expect staffing level to increase ■ Don't know/Not applicable



Unlike travel *programs*, travel *companies* continue to add staff.

Four in 10 supplier and TMC respondents (41%) expect their company will add staff this year. Only 6% expect their company will reduce staff.

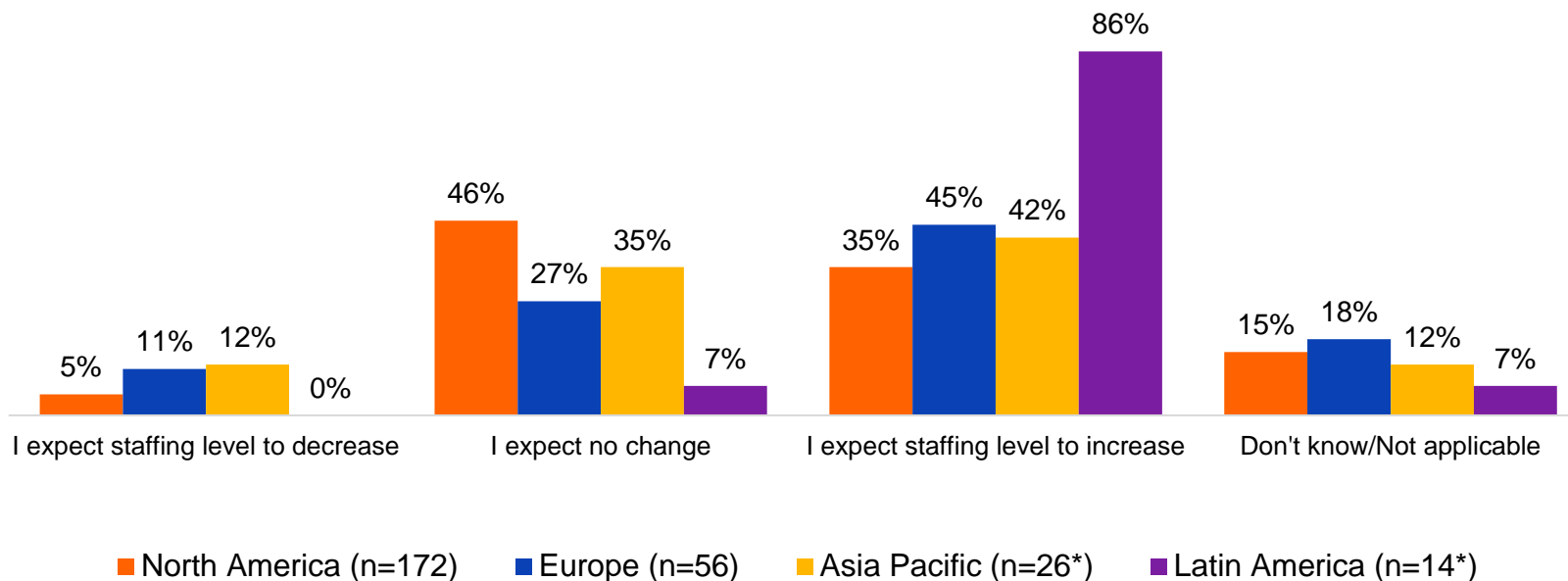
Q. Do you expect the staffing level of your company overall company to increase in 2025?

Note: Question only displayed to travel suppliers/TMC professionals (n=271)

The Travel Supplier/TMC's Perspective

In North America, Less Expectation That Travel Companies Will Add Staff

Do you expect the staffing level of your overall company to increase in 2025?
travel supplier/TMC professionals by region



In North America, only one-third of supplier/TMC respondents (35%) expect their company will add staff this year.

This is lower than in any other region.

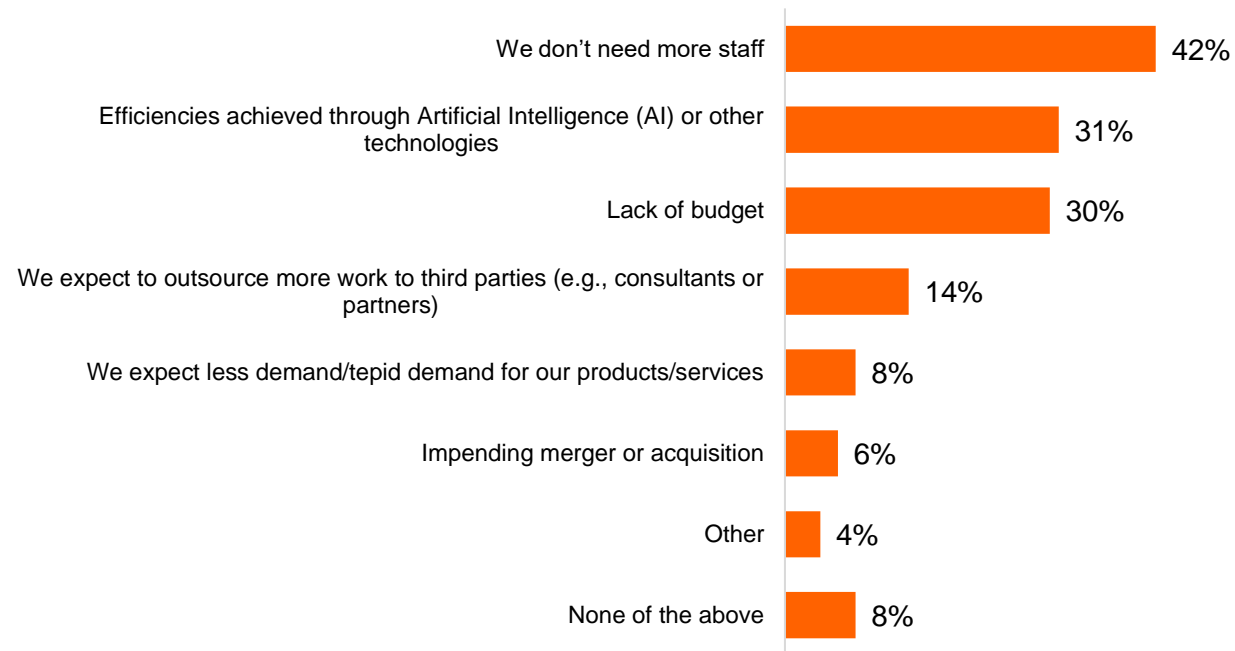
Q. Do you expect the staffing level of your overall company to increase in 2025? Note: This asks about the staff size of your current company. If your company is expected to acquire or merge with another company, please do not consider the combined staff size when answering this question. **Note: Question only displayed to travel supplier/TMC respondents**
***indicates small sample size (n<30) in Asia Pacific and Latin America**

The **Travel Supplier/TMC's** Perspective

Will AI Replace Supplier/TMC Jobs?

Why are supplier/TMC companies *not* adding staff this year?

Among buyers who expect their program's staff size will remain the same or decrease (multiple answers allowed)



Q. 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.

Note: Question only displayed to supplier/TMC professionals who indicated they expect their company's staff size will remain the same or decrease in 2025 (n=117)

While a fair number of travel supplier/TMC companies expect to add staff (see previous slides), others expect to maintain their current staff size – or even reduce staff.

When we asked why, their reasons vary. However, almost one-third (31%) mention efficiencies achieved through AI or other technologies as a reason.

Is It Still Difficult to Fill Business Travel Roles?

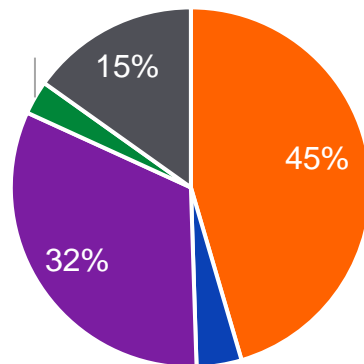
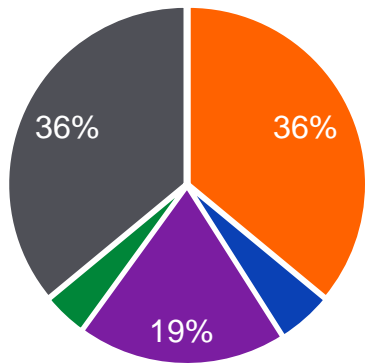
Thinking about the business travel industry in the past year, would you say?



travel buyers
(n=337)



travel suppliers/TMCs
(n=266)



- It has been difficult to fill open positions with qualified/talented candidates
- There is a surplus of qualified/talented candidates; it has been easy to fill open positions with the right candidates
- It has sometimes been easy to fill open positions with qualified/talented candidates; it has sometimes been difficult
- Other
- None of the above

During the COVID pandemic, a large number of business travel professionals lost their jobs or were forced to take pay cuts.

Many retired or left the industry entirely.

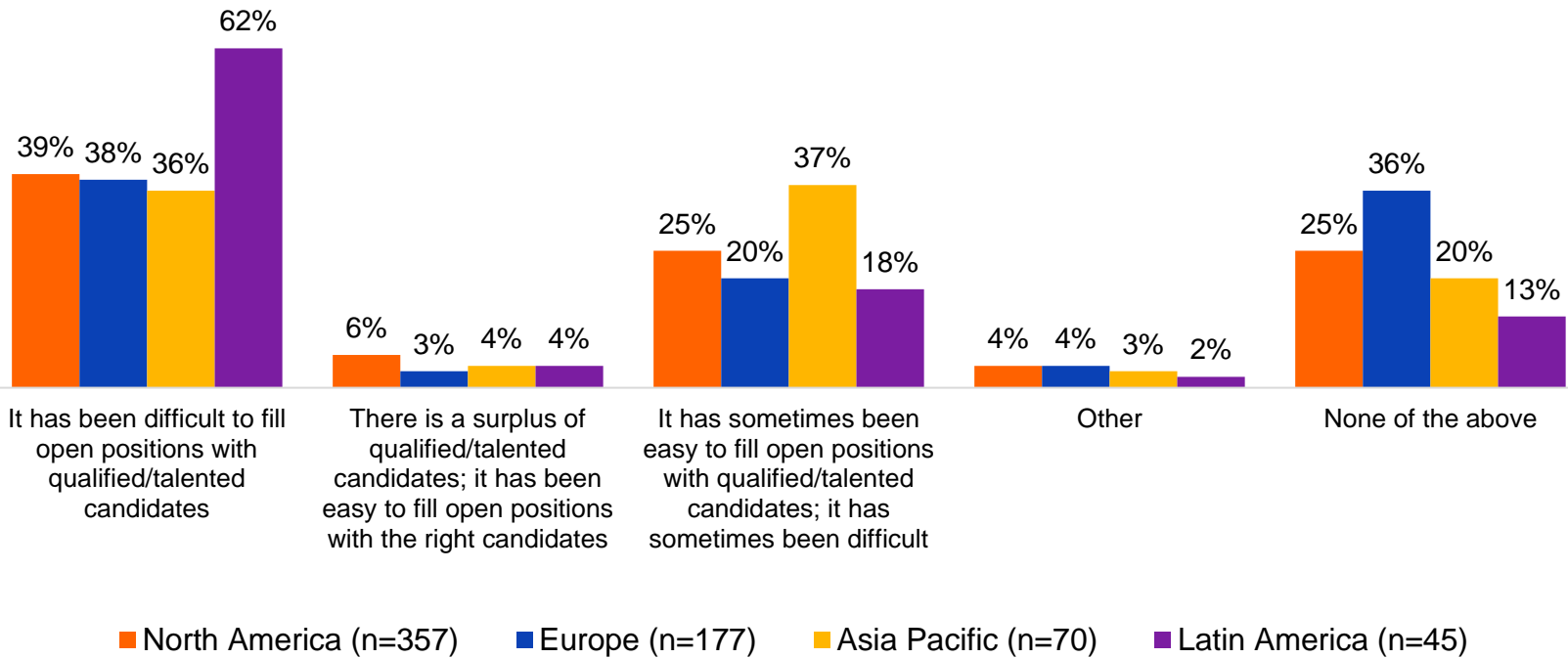
As jobs returned, it was difficult to find qualified candidates to fill them. A fair number of industry professionals think this challenge persists today.

More than one-third of buyers (36%) – and even more supplier/TMC professionals (45%) – say it has been difficult to fill open industry roles with qualified candidates over the past year.

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

Is the Talent Shortage More Pronounced in Some Regions?

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




Business travel professionals in Latin America are most likely to say it has been difficult to fill open positions with qualified candidates over the past year.


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

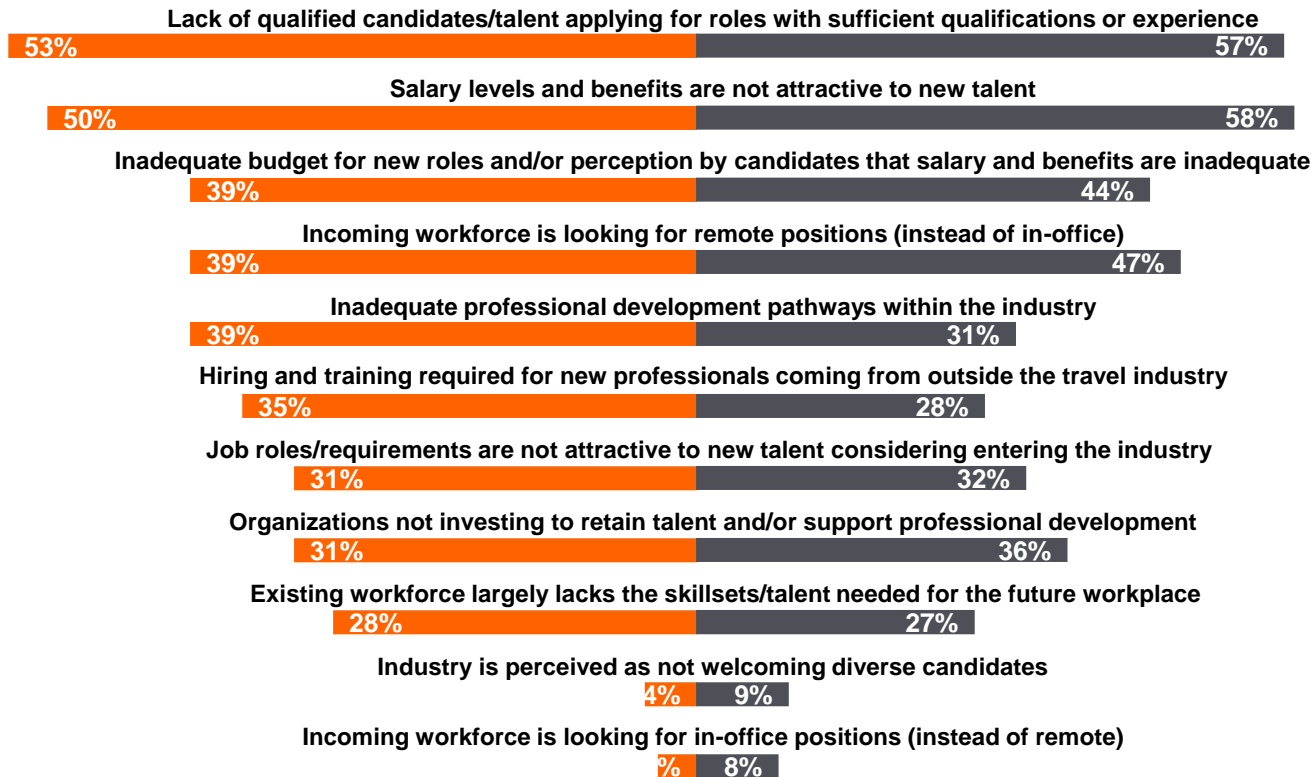
What Staffing Barriers Does the Business Travel Industry Face?

What are the biggest barriers that the global business travel industry faces in achieving a robust workforce?

% included in top 5

 travel buyers
(n=118)

 travel suppliers/TMCs
(n=118)



The business travel industry faces staffing barriers.

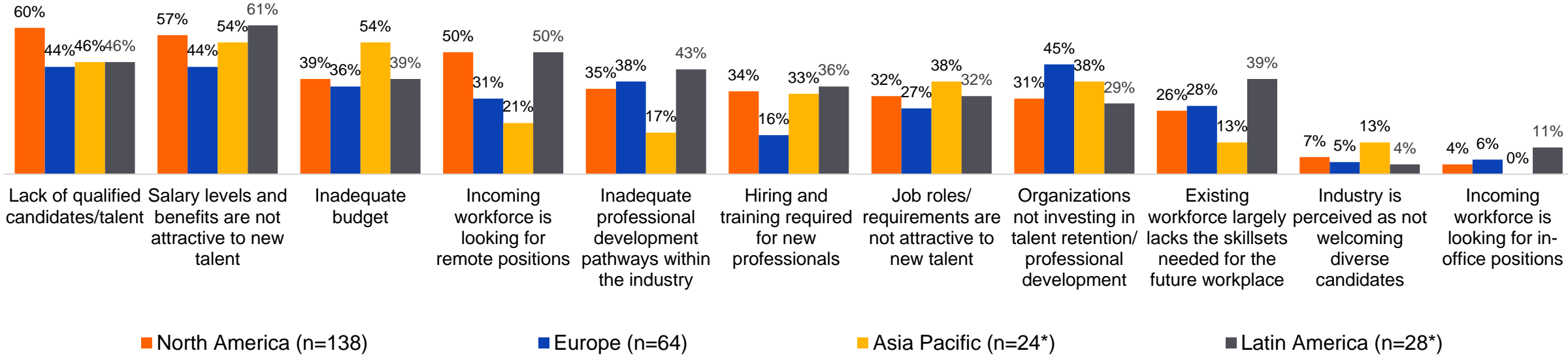
Buyers and suppliers commonly mention a lack of qualified candidates and unattractive salaries as barriers the industry is facing.

Another barrier – mentioned by half of supplier/TMC respondents (47%) – is the incoming workforce is looking for remote positions. As the industry clamps down on remote work (see page 47), this barrier will likely grow.

Q. 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. **Note: Question only displayed to respondents who indicated it has been difficult to fill positions in the industry with qualified candidates over the past year.**

Industry Staffing Barriers Across the World

What are the biggest barriers that the global business travel industry faces in achieving a robust, diverse, and sustainable workforce?
% included in top 5 by region



Q. 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. **Note: Question only displayed to respondents who indicated it has been difficult to fill positions in the industry with qualified candidates over the past year.**

Hybrid Work Policies Remain Common

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



Travel Buyers (n=336)

14% Full-time in-office

6% Full-time remote

71% Hybrid

9% Flex time (employee choice)



Travel Suppliers/TMCs (n=225)

31% Full-time in-office

14% Full-time remote

49% Hybrid

6% Flex time (employee choice)

Travel suppliers and TMCs are split when it comes to work policies.

Half of travel supplier/TMC respondents (49%) say their company has a **hybrid** work policy with employees required to report to an office some days – but permitted to work at home other days.

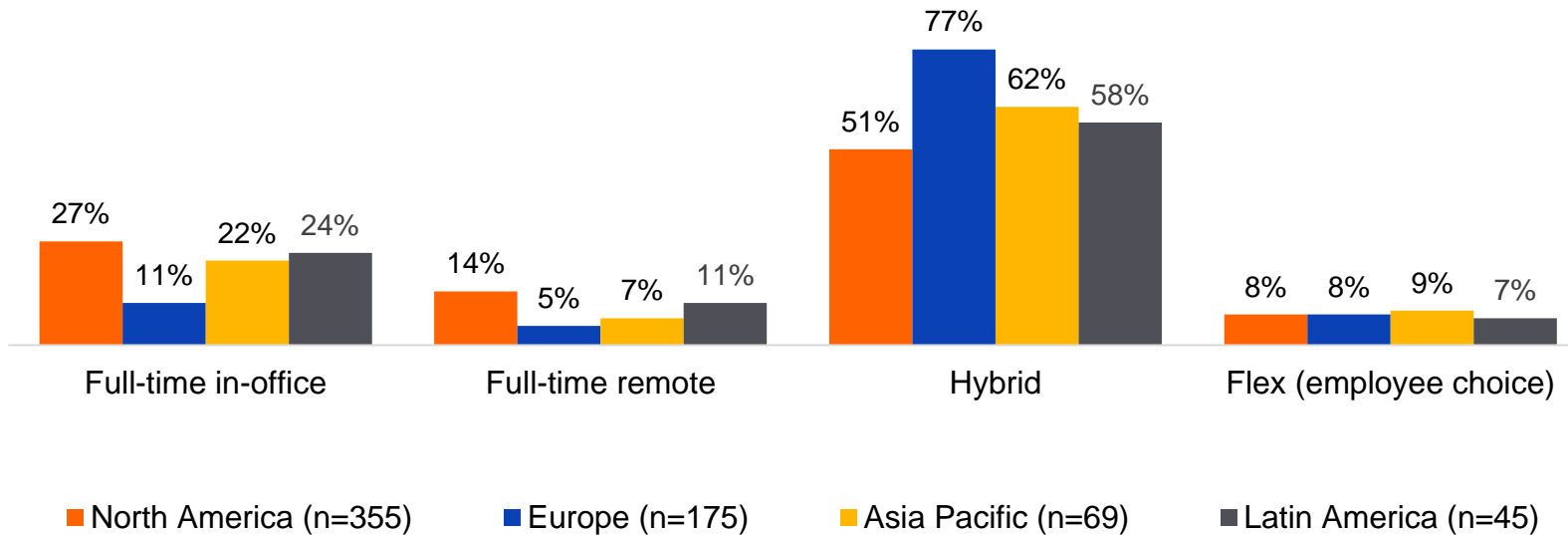
However, a significant number of these companies (31%) have a **full-time in-office** policy.

Buyer companies are nearly 50% more likely than travel suppliers to offer a hybrid work policy. (71% vs. 49%).

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

Hybrid Work Policies Are More Common in Europe

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



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

Hybrid work policies are most common in Europe.

Three-quarters of business travel professionals (77%) in the region say their company has a hybrid work policy.

Business Travel Companies Clamp Down on Remote Work

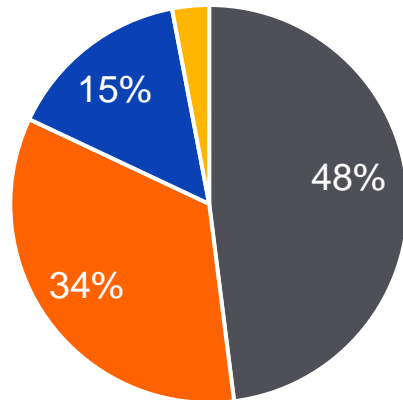
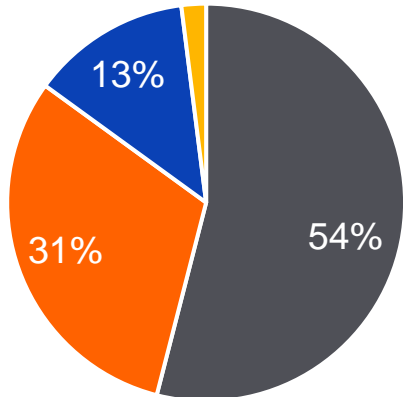
Thinking about your organization's Work-From-Home (WFH) policies, how have they changed in the past year?



travel buyers
(n=331)



travel suppliers/TMCs
(n=262)



- They have not changed
- 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
- They have become more flexible: We are giving employees greater flexibility to work from home
- Other

Work policies become stricter – especially at supplier/TMC companies.

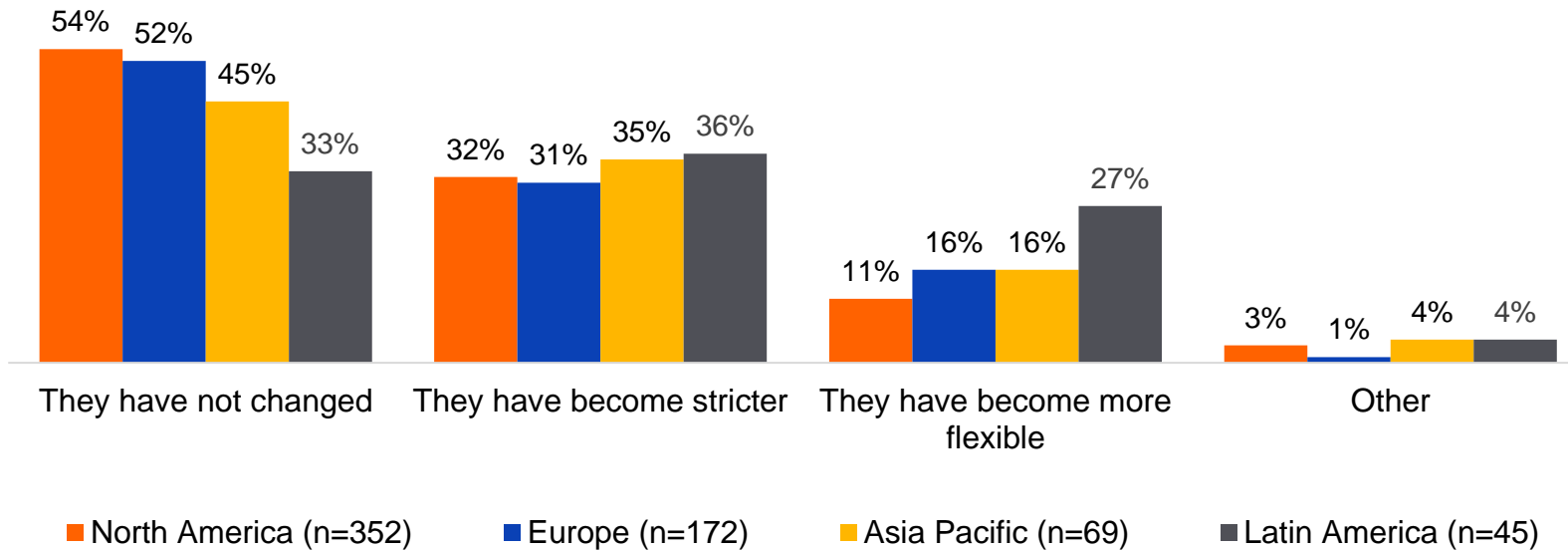
One-third of travel supplier/TMC respondents (34%) say their company's Work-From-Home (WFH) policies have become stricter over the past year. Employees are required to report to an office more often, or companies are more strictly enforcing requirements they already had.

This does not mean companies have *abandoned* the hybrid work model (see page 45). However, they appear to offer *less flexibility*.

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

Do WFH Policy Changes Vary by Region?

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



In three of the four regions surveyed—North America, Europe, and Asia Pacific—roughly one-third of business travel professionals say their company's Work-From-Home (WFH) policies became stricter over the past year.

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



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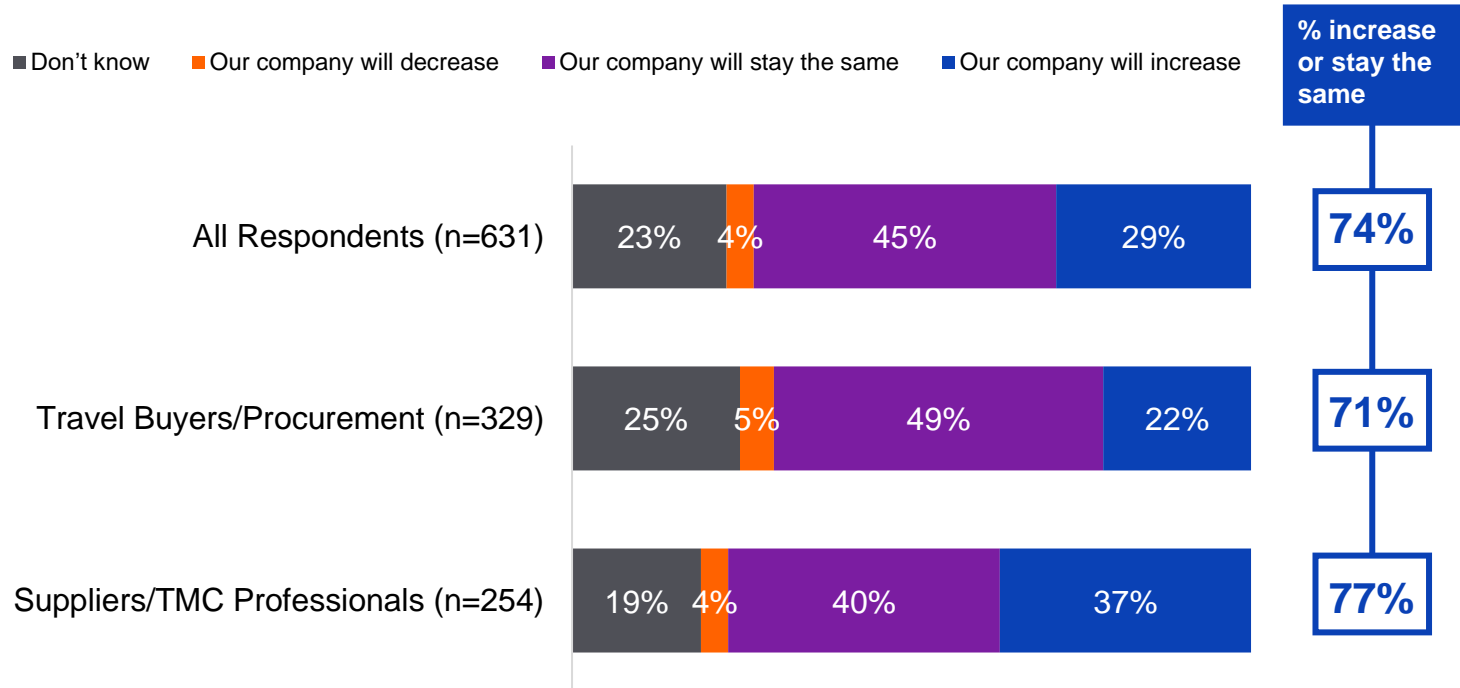
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People and Planet Programs



Business Travel Companies Remain Committed to People-Focused Initiatives

How will company's investment in people-focused programs change this year?



Business travel companies remain committed to people-focused initiatives.

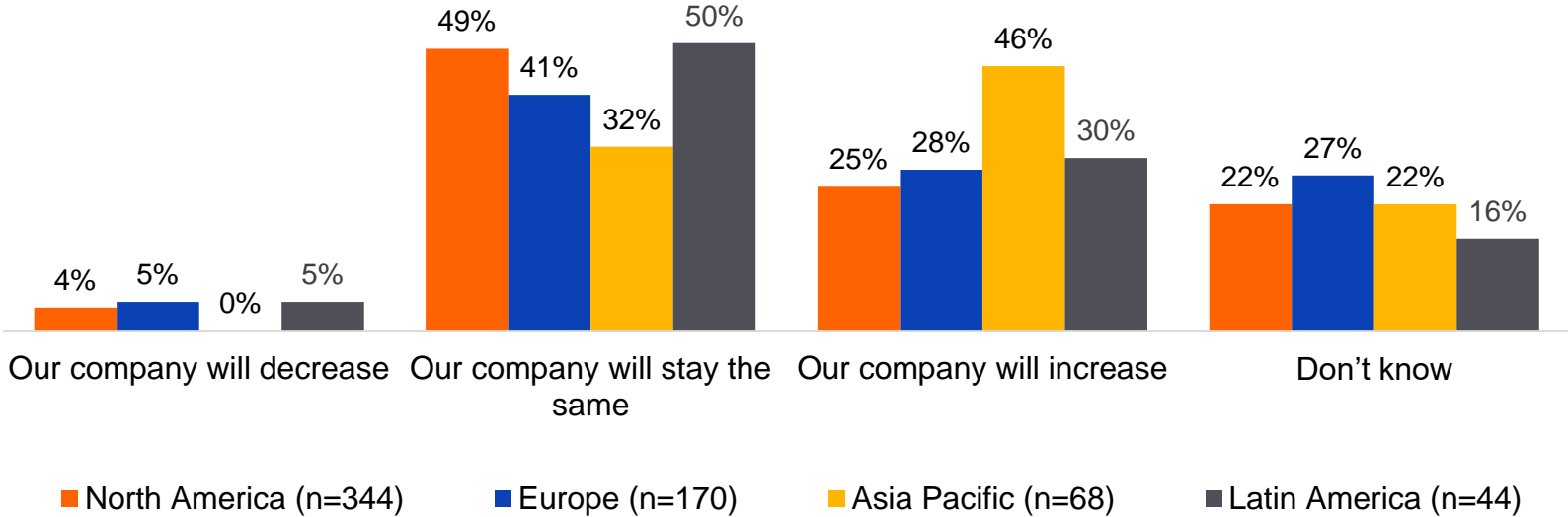
Major multinational corporations have recently eliminated or scaled back Diversity, Equity, and Inclusion (DEI) programs and initiatives.

Yet in the business travel industry, companies remain committed to people-focused initiatives – even if the concept is broader than DEI. A large majority of supplier/TMC respondents (77%) expect their company will increase or maintain support of people-focused initiatives (such as accessibility and inclusion) this year.

Q. 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)?

How Does Expected Support of People-Focused Initiatives Vary by Region?

How will company's investment in people-focused programs change this year?



Q. 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)?

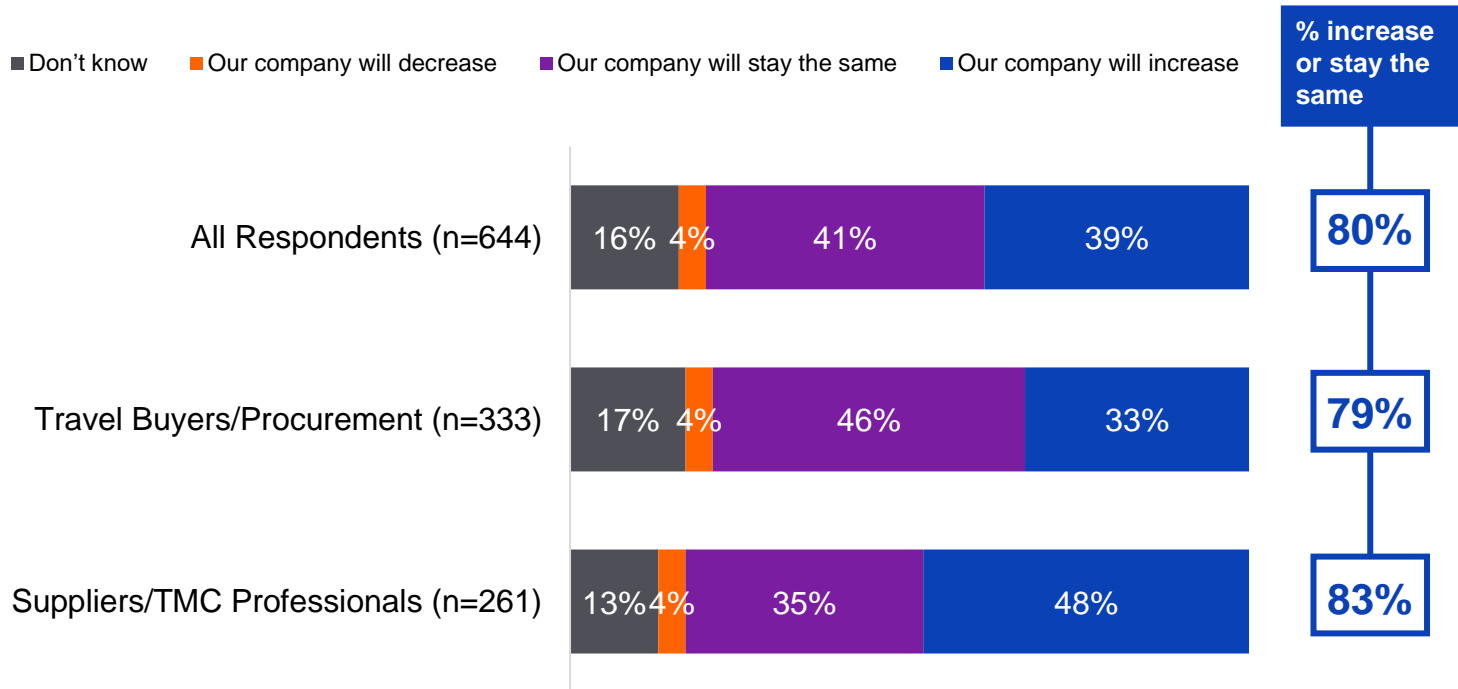


Across the world, business travel professionals expect their company will maintain support of people-focused programs this year.

However, Asia Pacific-based respondents are most likely to expect their company will *increase* support of these programs.

A Solid Number of Companies Expect to Increase Support of Planet-Focused Programs

How will company's investment in planet-focused programs change this year?



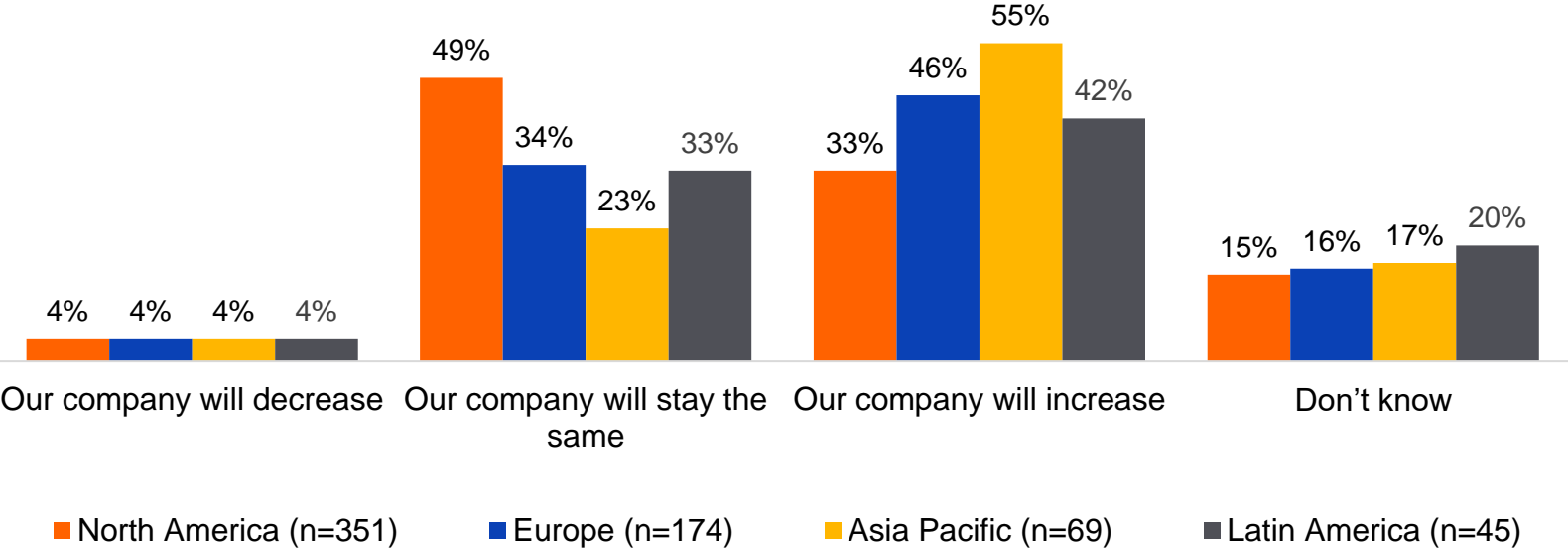
Business travel companies ramp up sustainability efforts.

Almost half of supplier/TMC respondents (48%) expect their company will increase support of sustainability efforts this year.

Q. 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)?

How Does Expected Support of Planet-Focused Initiatives Vary by Region?

How will company's investment in planet-focused programs change this year?



Across the world, a good number of business travel professionals expect their company will increase support of planet-focused initiatives this year.

However, North America-based respondents are least likely to say so.

Q. 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)?



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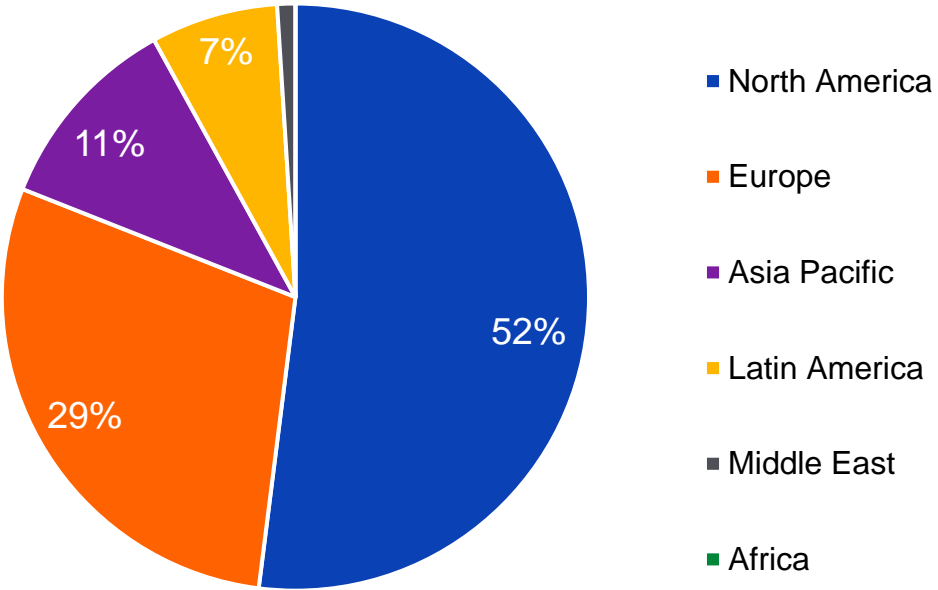
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Respondent Profile



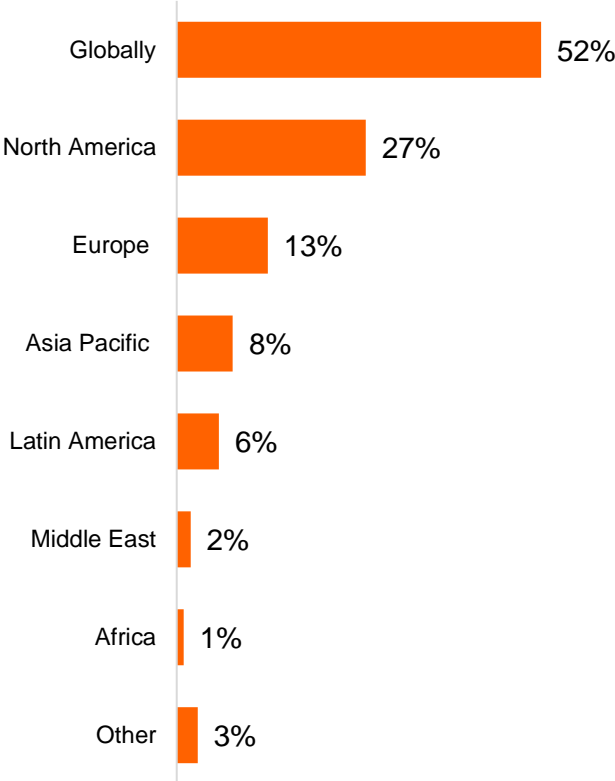
Respondent Profile

Region



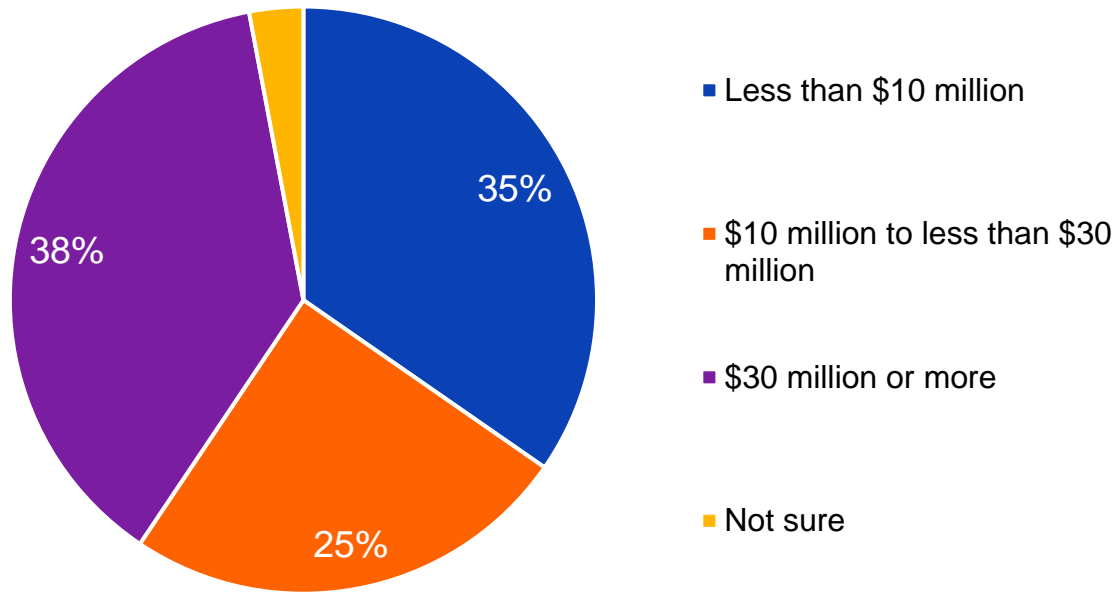
Scope of Responsibilities

Multiple answers allowed



The Travel Buyer's Perspective

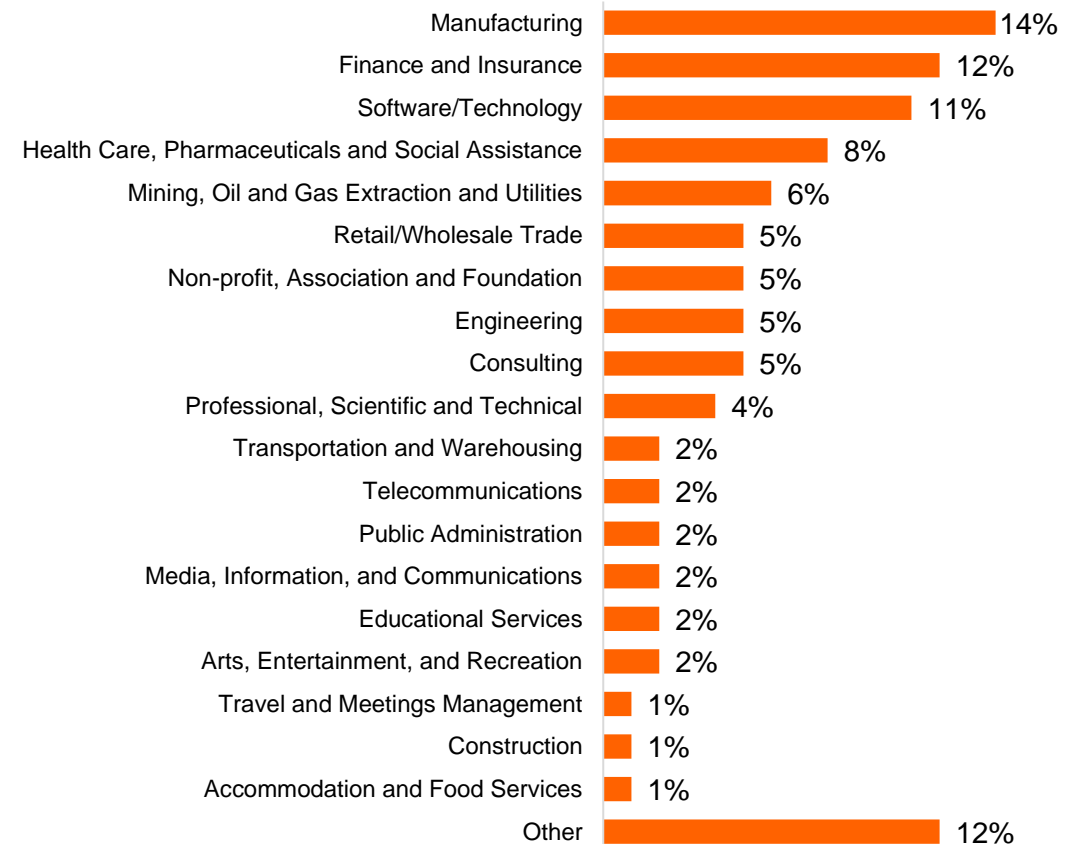
Annual Travel Spend (in U.S. Dollars)



n=408



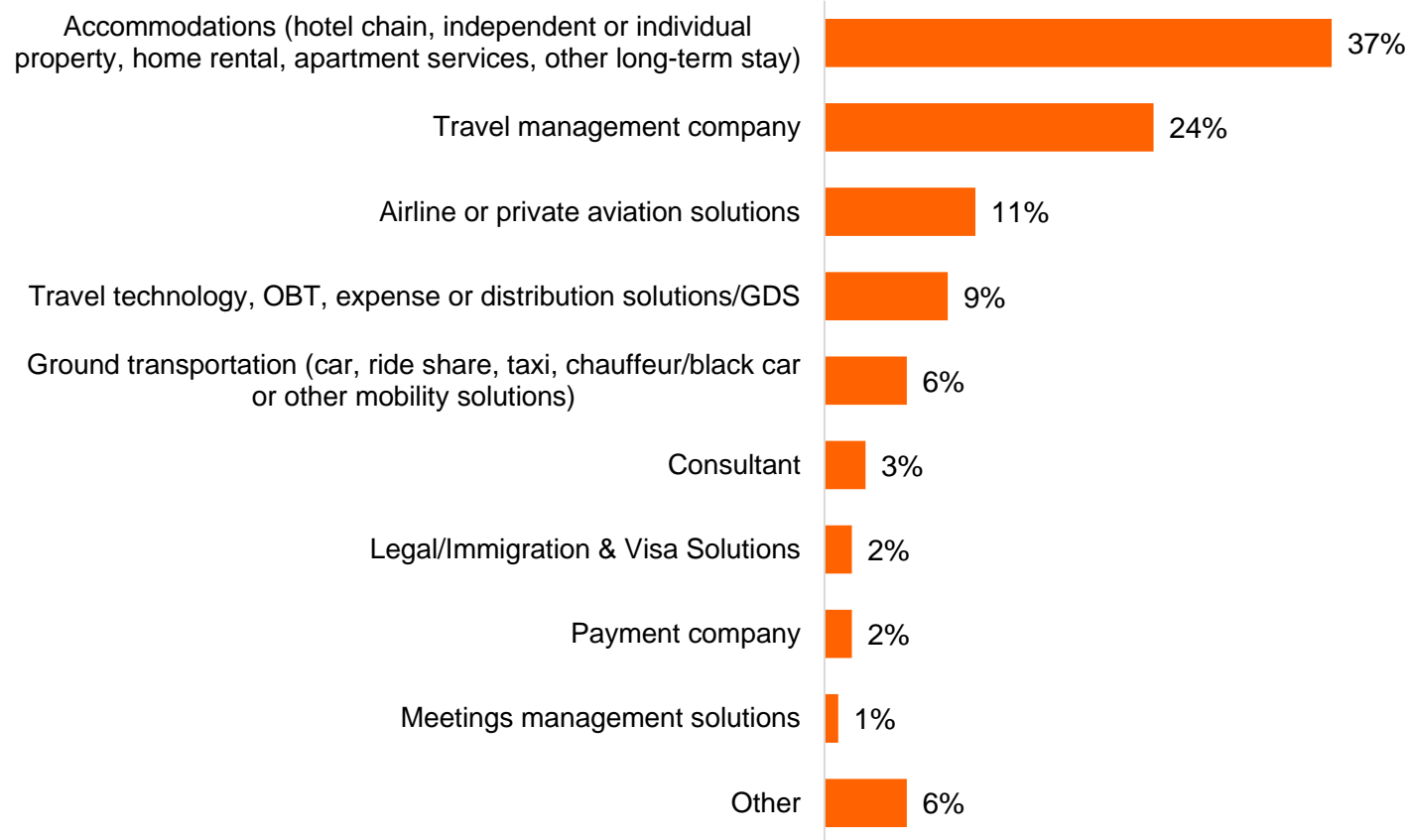
Industry



n=329

The **Travel Supplier's** Perspective

Company Type





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