



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA Business Travel Industry Outlook Poll

April 30, 2024



Methodology

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

- Data collection from April 8 through April 22, 2024
- An email invitation was sent to 17,389 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, 815 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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Career Reflections



Career Advancement and Reflections

The early months of the year are pivotal for career advancement. At many companies, this is “performance review” season. Salaries are determined. Promotions and bonuses are awarded. Employees decide if they want to remain at their company, or seek a new job.

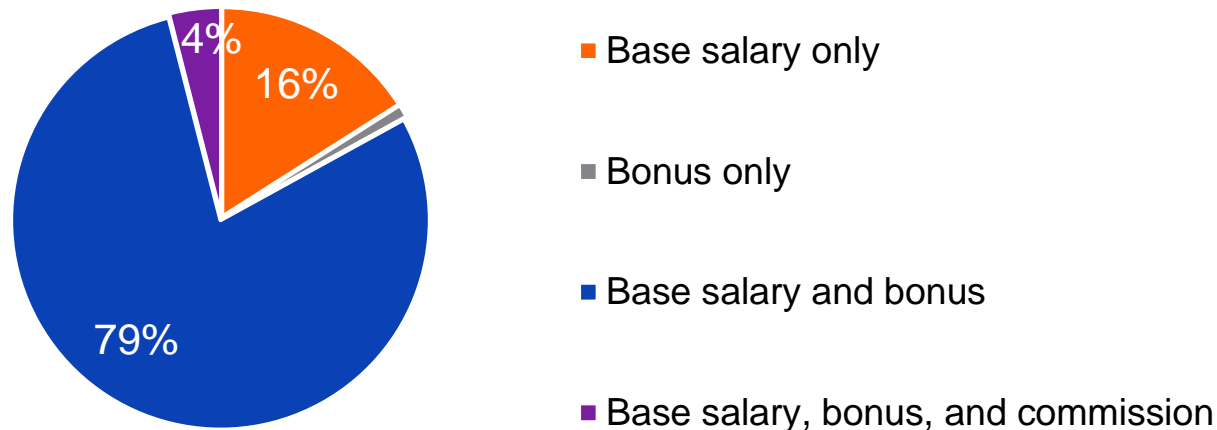
For the business travel industry, this process remains unsettled. The industry faces a talent shortage and stronger-than-expected travel demand. A new generation of leaders has emerged. At the same time, companies continue to pursue efficiencies. Airlines have restructured sales teams. Recent TMC mergers are expected to have staffing implications. Across the industry, companies are investing in Artificial Intelligence (AI) with an eye toward streamlining processes, and reducing labor costs.

A key focus of this poll was to examine the staffing environment in the business travel industry. Did business travel professionals receive raises or promotions in the past year? Did they change jobs? Do they expect to change jobs—or receive a promotion — in the coming year? In addition to examining the current staffing environment, the poll asked business travel professionals to reflect on their careers more broadly. Do they like working in the industry? Do they have good work-life balance? If they could go back in time, would they still pursue a career in business travel? These questions build on a GBTA study, conducted last year, examining the career paths of travel managers.



Most Travel Buyers Expect to Receive a Bonus

Travel Manager Compensation Structure



Note: Results filtered to only show travel buyers/procurement professionals

Respondents were asked about three types of compensation separately:

- Have you received—or do you expect to receive—the following types of compensation this year?
 - Base salary
 - Bonus (i.e., tied to my own performance or my company's performance)
 - Commissions (e.g., tied to sales)

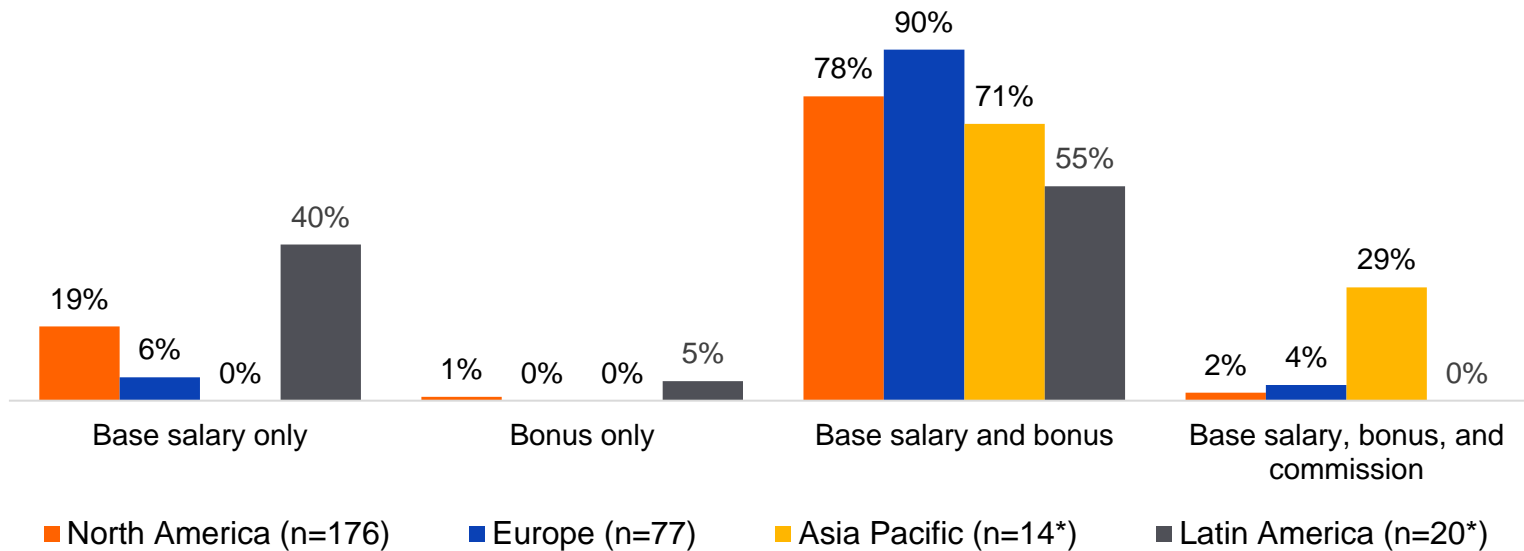
Using statistical software, a “recode” was performed to analyze how they responded to these questions in combination with each other (n=683)

Most travel buyers (83%) received—or expect to receive — a bonus in addition to their base salary this year. This might be tied to their company's performance, or their own performance.

Fewer than one in five (16%) expect to receive *only* a base salary with no bonus or incentive compensation.

Europe-Based Buyers Are Most Likely to Receive a Bonus This Year

Compensation Structure
travel buyers by region



Note: Results filtered to only show travel buyers/procurement professionals
*indicates small sample size for Asia Pacific and Latin America-based travel buyers

Europe-based travel buyers are most likely to receive a bonus. Nine in 10 Europe-based buyers (90%) received—or expect to receive—a bonus in addition to their base salary this year. This compares to three-quarters of North America-based buyers (78%).

One in five North America-based buyers (19%) will *only* receive a base salary. This is considerably higher than the share of Europe-based buyers (6%) who expect the same.

Roughly Half of Business Travel Sales Professionals Receive Commission

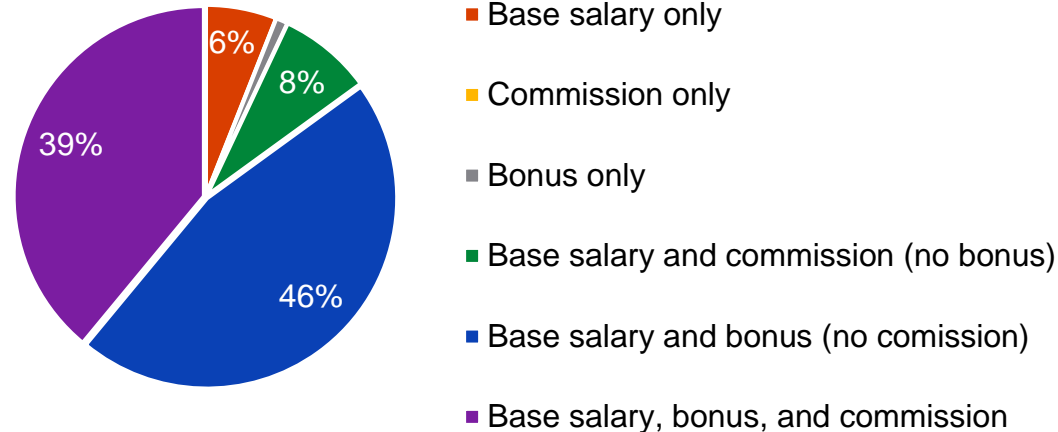
47% will earn commissions this year including:

- **8%** who will earn a base salary and commissions (no bonus)
- **39%** who will earn a base salary, commissions, and a bonus

52% will not earn commissions including:

- **6%** who will only earn a base salary
- **46%** who will earn a base salary and bonus

Business Travel Sales Professional Compensation Structure



Note: Results filtered to only show travel suppliers who indicate they have a sales role

Respondents were asked about three types of compensation separately:

- Have you received—or do you expect to receive—the following types of compensation this year?
 - Base salary
 - Bonus (i.e., tied to my own performance or my company's performance)
 - Commissions (e.g., tied to sales)

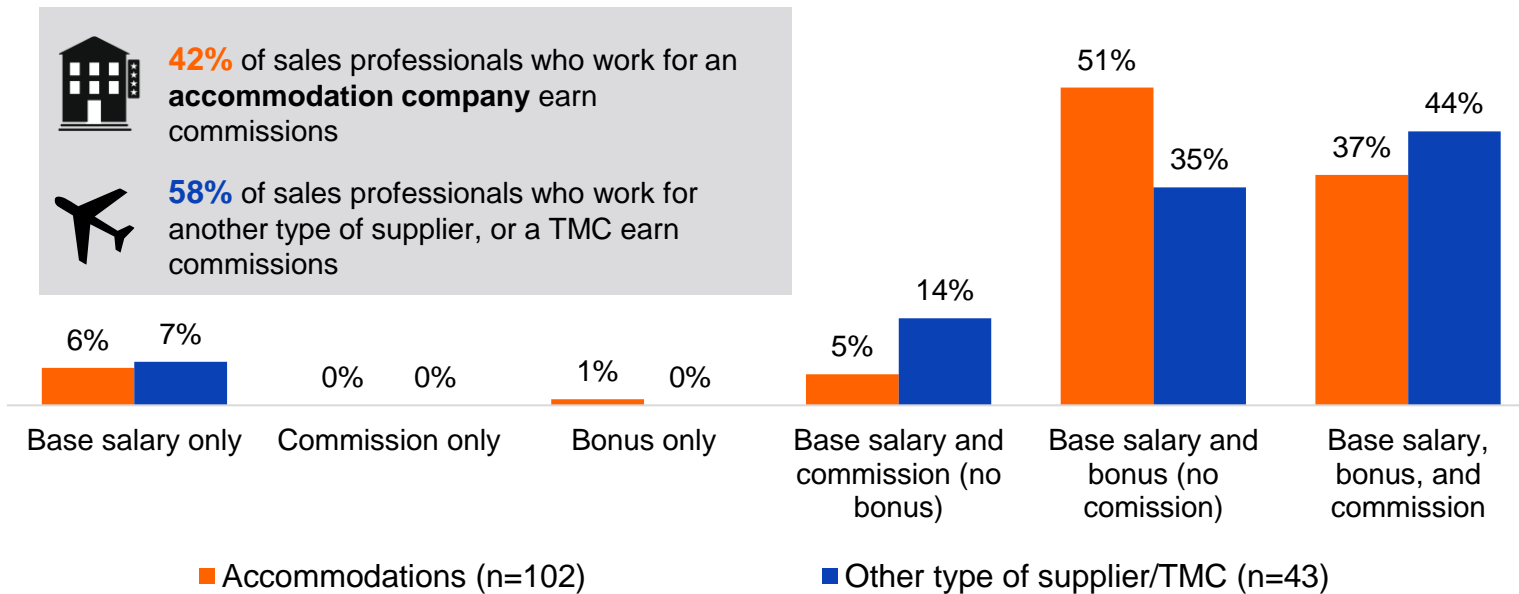
Using statistical software, a “recode” was performed to analyze how they responded to these questions in combination with each other (n=145)

For sales roles in the business travel industry, the compensation structure varies. Almost half of business travel sales professionals (47%) received—or expect to receive—commission compensation this year. For instance, they might earn a percentage based on the revenue they generate for their company. In addition, they almost always receive a base salary as well. No sales professionals who responded to the survey are “commission only.”

Half of sales professionals (52%) *do not* receive commissions. However, they are often still rewarded for results. These sales professionals commonly earn a bonus which could be tied to their own performance, or their company's performance.

Accommodations Sales Professionals Less Likely to Receive Commissions

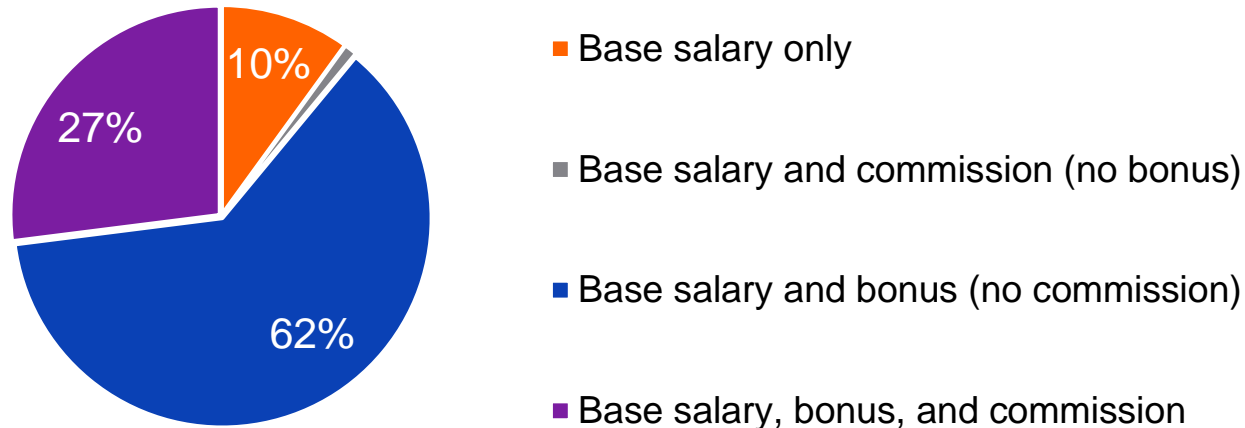
Compensation Structure
business travel sales professionals by employer type



In the accommodations sector, sales professionals are less likely to receive commissions. However, a decent number still receive them. Two-fifths of sales professionals (42%) who work in the accommodations sector (i.e., at hotel property, chain, or related company) will receive commission-based compensation this year. This compares to almost three in five sales professionals (58%) who work at other types of suppliers.

Travel Companies Widely Award Bonuses

Supplier/TMC Compensation Structure (Non-Sales)



Note: Results filtered to only show suppliers/TMC employees who indicated they do not have a sales role

Respondents were asked about three types of compensation separately:

- Have you received—or do you expect to receive—the following types of compensation this year?
 - Base salary
 - Bonus (i.e., tied to my own performance or my company's performance)
 - Commissions (e.g., tied to sales)

Using statistical software, a “recode” was performed to analyze how they responded to these questions in combination with each other (n=92)

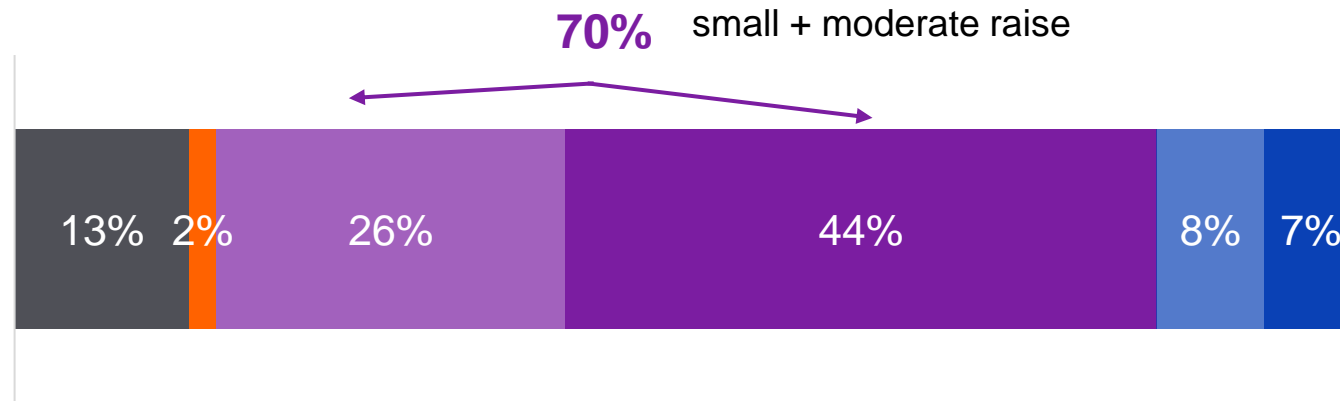
Some employees of travel companies work in sales. However, many occupy other roles. These include senior leadership, product development, marketing, account management, and finance. While these professionals typically do not earn commissions, they commonly earn bonuses.

Almost nine in 10 (89%) employees who work for a travel company in a **non-sales** role received—or expect to receive—a bonus in addition to their base salary this year.

Business Travel Professionals Receive Modest Increase in Base Salary

Thinking about your base salary, which of the following best describes your situation this year (2024)?

- My salary has not yet been determined for 2024
- I took/expect to take a pay cut
- I received/expect to receive a small raise (0%-2.5%)
- I received/expect to receive a modest raise (2.6%-5%)
- I received/expect to receive a moderate raise (5.1%-7-5%)
- I received/expect to receive a large raise (More than 7.5%)



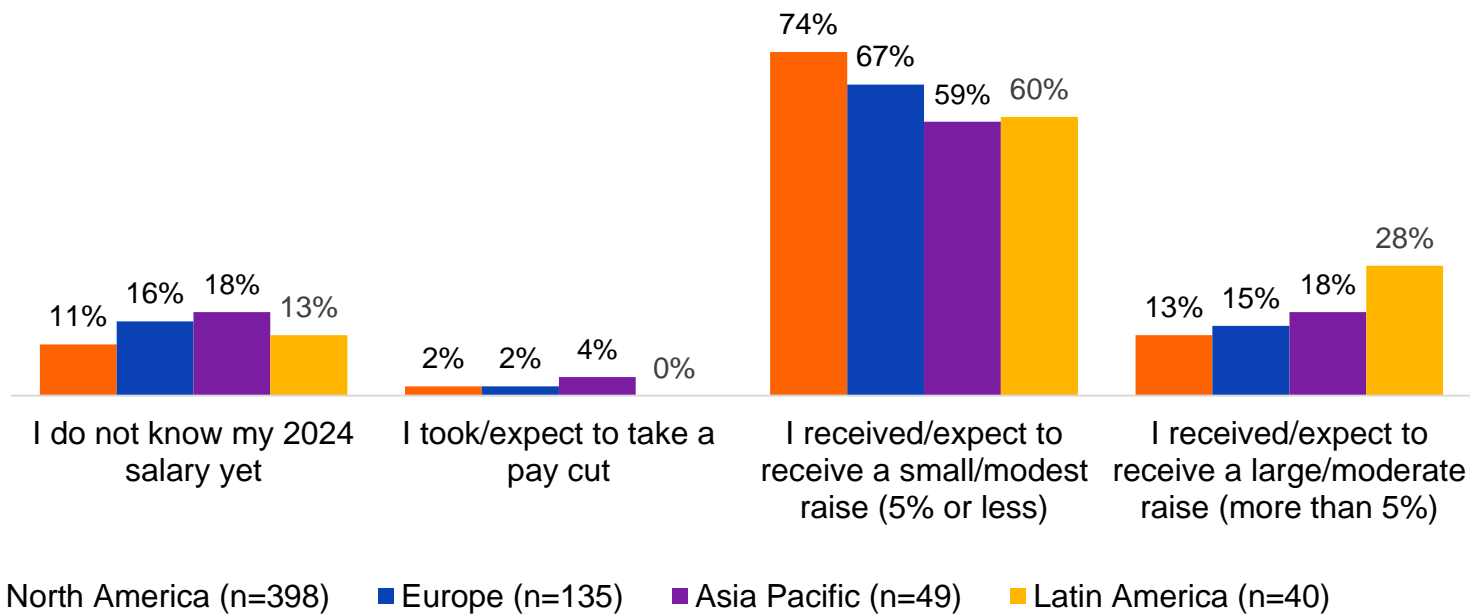
Most business travel professionals (86%) report an increase in base salary this year. However, increases are modest. One-quarter of business travel professionals (26%) received—or expect to receive-- a small salary increase (2.5% or less). Two in five (44%) report a modest increase (2.6% to 5%). Only 15% report a moderate/large increase of more than five percent.

Q. Thinking about your base salary, which of the following best describes your situation this year (2024)?

Note: Question only displayed to respondents who indicated they received—or expect to receive—a base salary this year (n=627)

Salary Increases Are Highest in Latin America

Thinking about your base salary, which of the following best describes your situation this year (2024)?
by respondent type



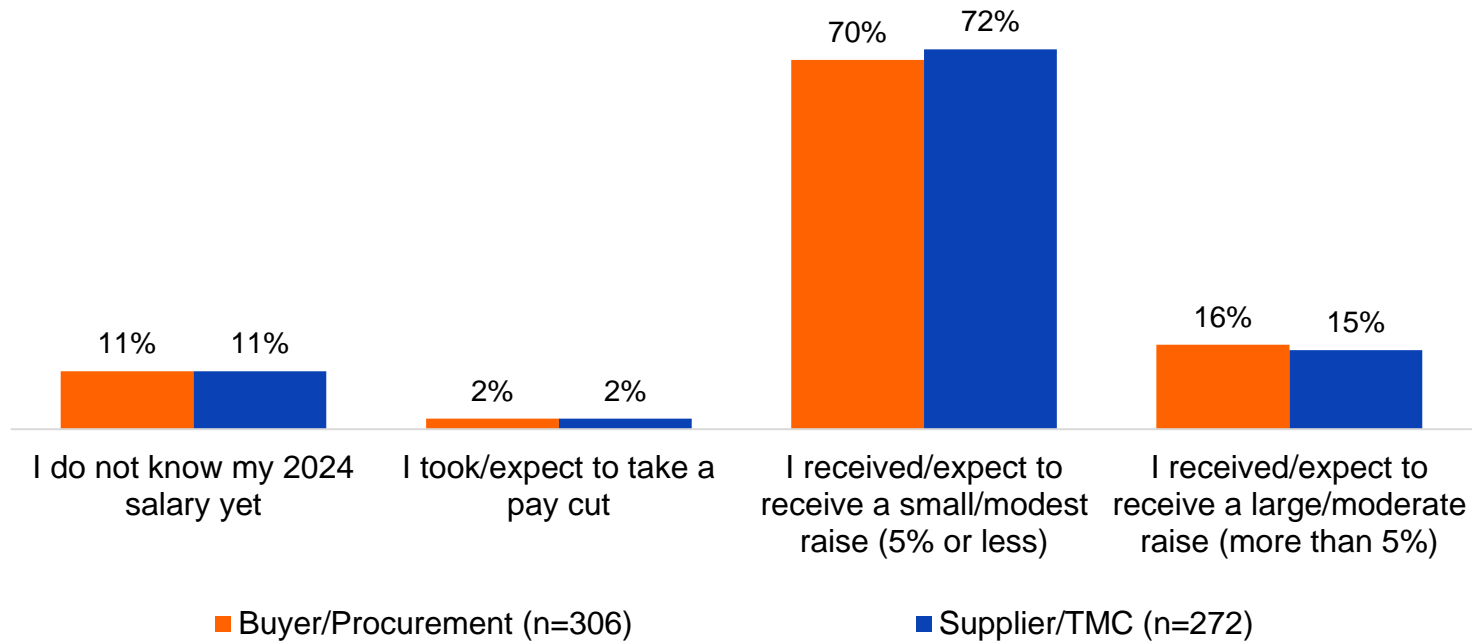
Q. Thinking about your base salary, which of the following best describes your situation this year (2024)?

Note: Question only displayed to respondents who indicated they received—or expect to receive—a base salary this year

Salary increases are highest in Latin America. More than one-quarter of business travel professionals (28%) in the region report a salary increase of more than five percent.

Salary Increases Are Similar For Buyers and Suppliers

Thinking about your base salary, which of the following best describes your situation this year (2024)?
by respondent type



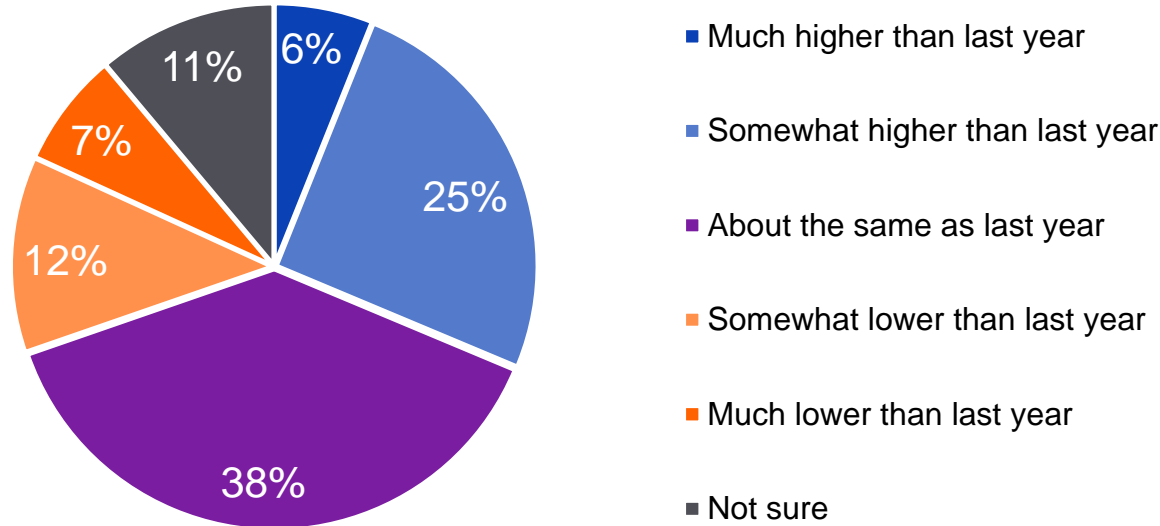
Q. Thinking about your base salary, which of the following best describes your situation this year (2024)?

Note: Question only displayed to respondents who indicated they received—or expect to receive—a base salary this year

Buyers and suppliers see similar increases in base salary.

For Buyers, Bonuses Are Mostly Flat

How Do Buyer Bonuses Compare to Last Year?



For buyers, bonuses remain largely flat. Of the buyers that expect to receive a bonus, fewer than one-third (31%) say their bonus will be higher than it was last year. A larger number (57%) say their bonus will be about the same (38%) or lower (19%).

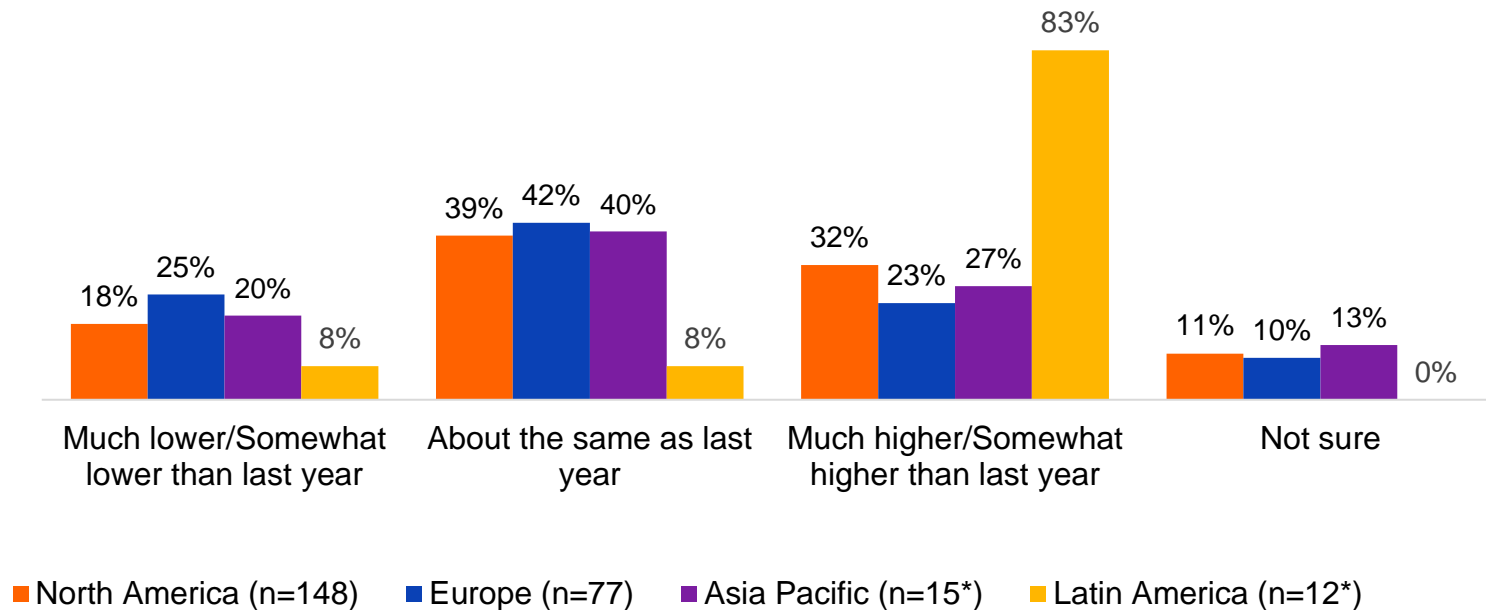
Q. Thinking about your bonus compensation this year, is it, or do you expect it will be?

Note: This asks about bonuses that are paid to you this year even if they were earned last year.

Note: Results filtered for buyers who indicated they received—or expect to receive—bonus compensation this year (n=254).

North American Buyers Receive Larger Bonuses

Thinking about your bonus compensation this year, is it, or do you expect it will be?
by respondent type



European buyers are less likely to see a bonus increase.

As shown earlier, European buyers are *more likely* than their North American counterparts to receive bonuses this year (see page 6). However, they are *less likely* to see a bonus increase. Of the European buyers who receive a bonus, fewer than one-quarter (23%) say their bonus is higher this year than it was last year. This compares to one-third of North American buyers (32%) who say their bonus is higher.

Q. Thinking about your bonus compensation this year, is it, or do you expect it will be? **Note: This asks about bonuses that are paid to you this year even if they were earned last year.**

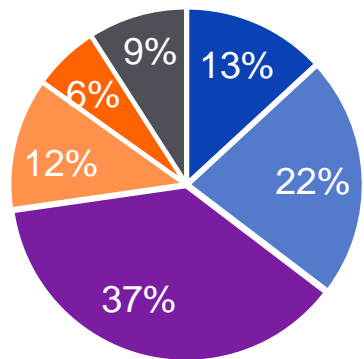
Note: Results filtered for buyers who indicated they received—or expect to receive—bonus compensation this year.

The Travel Supplier's Perspective

For Suppliers/TMCs, Commission Compensation Outpaces Bonus Compensation

How Do Supplier/TMC Bonuses Compare to Last Year?

35% somewhat + much higher



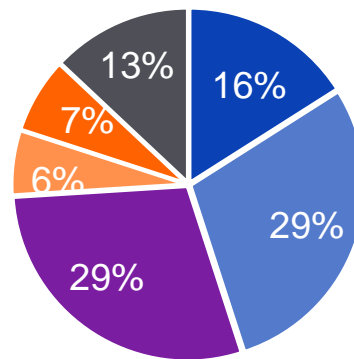
- Much higher than last year
- Somewhat higher than last year
- About the same as last year
- Somewhat lower than last year
- Much lower than last year
- Not sure

Q. Thinking about your bonus compensation this year, is it, or do you expect it will be? **Note: This asks about bonuses that are paid to you this year even if they were earned last year.**

Note: Results filtered for suppliers/TMC employees who indicated they received—or expect to receive—bonus compensation this year (n=234).

How Do Supplier/TMC Commissions Compare to Last Year?

45% somewhat + much higher



- Much higher than last year
- Somewhat higher than last year
- About the same as last year
- Somewhat lower than last year
- Much lower than last year
- Not sure

Q. Thinking about your commission compensation this year, is it, or do you expect it will be? **Note: This asks about commissions that are paid to you this year even if they were earned last year.**

Note: Results filtered for suppliers/TMC employees who indicated they received—or expect to receive—bonus compensation this year (n=107).

For suppliers, commissions outpace bonuses.

Of the suppliers/TMC employees who receive bonuses, one-third (35%) say their bonus is higher this year than it was last year.

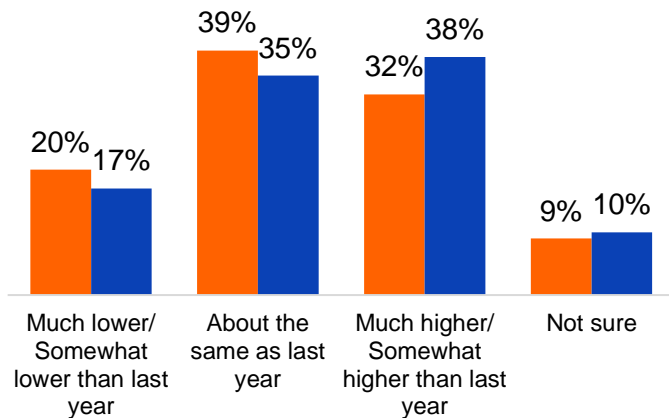
However, commission compensation is more likely to increase. Of the supplier/TMC employees who receive commissions, almost half (45%) say their commission compensation is higher this year.

This could reflect strong travel demand. Commissions allow salespeople to benefit from greater spending on business travel even as companies try to keep labor costs in check.

The Travel Supplier's Perspective

In the Accommodations Sector, Commissions Are Less Likely to Increase

How Do Supplier/TMC Bonuses Compare to Last Year?
by supplier type



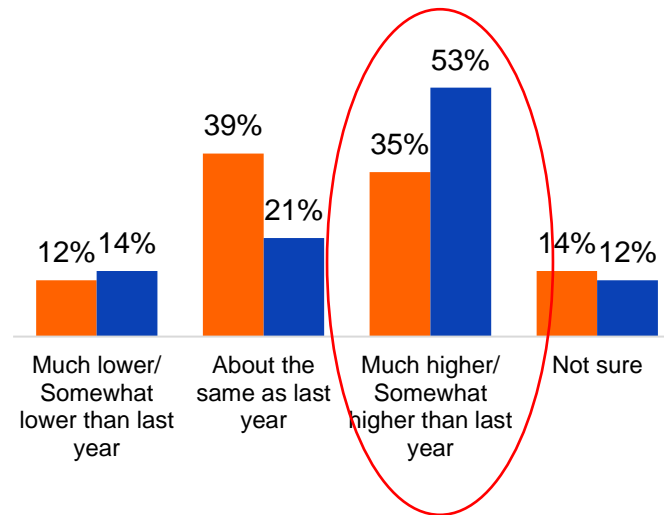
■ Accommodations (n=112) ■ Other suppliers/TMCs (n=122)

Q. Thinking about your bonus compensation this year, is it, or do you expect it will be?

Note: This asks about bonuses that are paid to you this year even if they were earned last year.

Note: Results filtered for suppliers/TMC employees who indicated they received—or expect to receive—bonus compensation this year.

How Do Supplier/TMC Commissions Compare to Last Year?
by supplier type



■ Accommodations (n=49) ■ Other suppliers/TMCs (n=58)

Q. Thinking about your commission compensation this year, is it, or do you expect it will be?

Note: This asks about commissions that are paid to you this year even if they were earned last year.

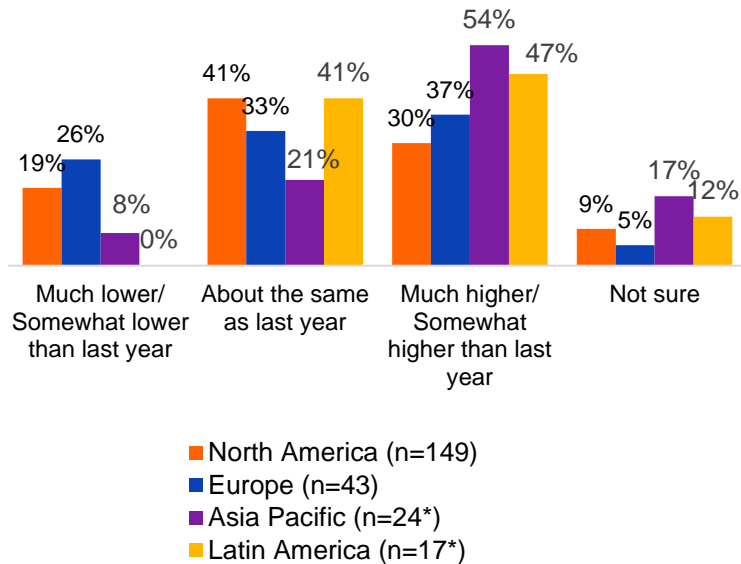
Note: Results filtered for suppliers/TMC employees who indicated they received—or expect to receive—commission compensation this year.

Business travel professionals who work in the accommodations sector are about equally likely as other types of supplier/TMC employees to say their bonus compensation increased this year. However, they are *less* likely to say their *commission* compensation increased. Of those that receive commissions, only one-third of professionals in the accommodations sector (35%) expect their commissions will be higher this year than they were last year. This compares to more than half of respondents (53%) who work at other types of suppliers or TMCs.

The Travel Supplier's Perspective

Europe-Based Suppliers Are Slightly More Likely to See Bonuses Increase

How Do Supplier/TMC Bonuses Compare to Last Year?
by supplier type

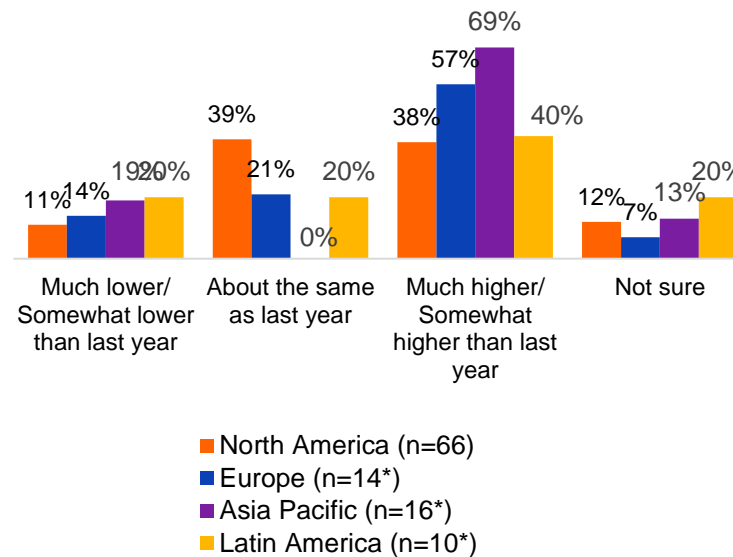


Q. Thinking about your bonus compensation this year, is it, or do you expect it will be? **Note: This asks about bonuses that are paid to you this year even if they were earned last year.**

Note: Results filtered for suppliers/TMC employees who indicated they received—or expect to receive—bonus compensation this year.

*indicates small sample size for suppliers/TMC employees in Asia Pacific and Latin America (n<30)

How Do Supplier/TMC Commissions Compare to Last Year?
by supplier type



Q. Thinking about your commission compensation this year, is it, or do you expect it will be? **Note: This asks about commissions that are paid to you this year even if they were earned last year.**

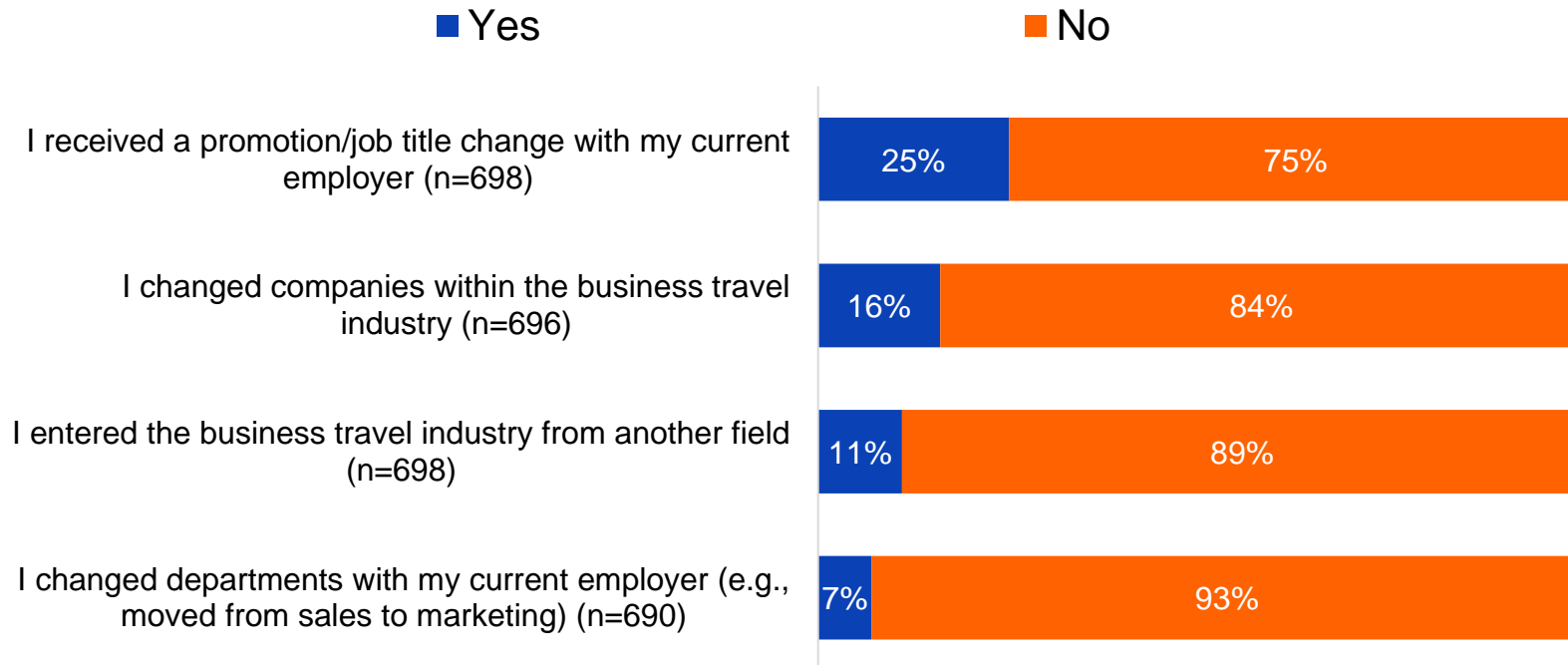
Note: Results filtered for suppliers/TMC employees who indicated they received—or expect to receive—commission compensation this year.

*indicates small sample size for suppliers/TMC employees in Asia Pacific, Europe, and Latin America (n<30)

While European *buyers* are less likely to see a bonus increase (see p. 14), the opposite is true of *suppliers*. A larger number of supplier/TMC employees in Europe (37%) than North America (30%) expect to receive higher bonuses this year than they did last year.

One-Quarter of Business Travel Professionals Received a Promotion or Job Title Change With Their Current Employer in the Past Year

Thinking about your own role, did the following happen in the past year?



Q. Thinking about your own role, did the following happen in the past year?

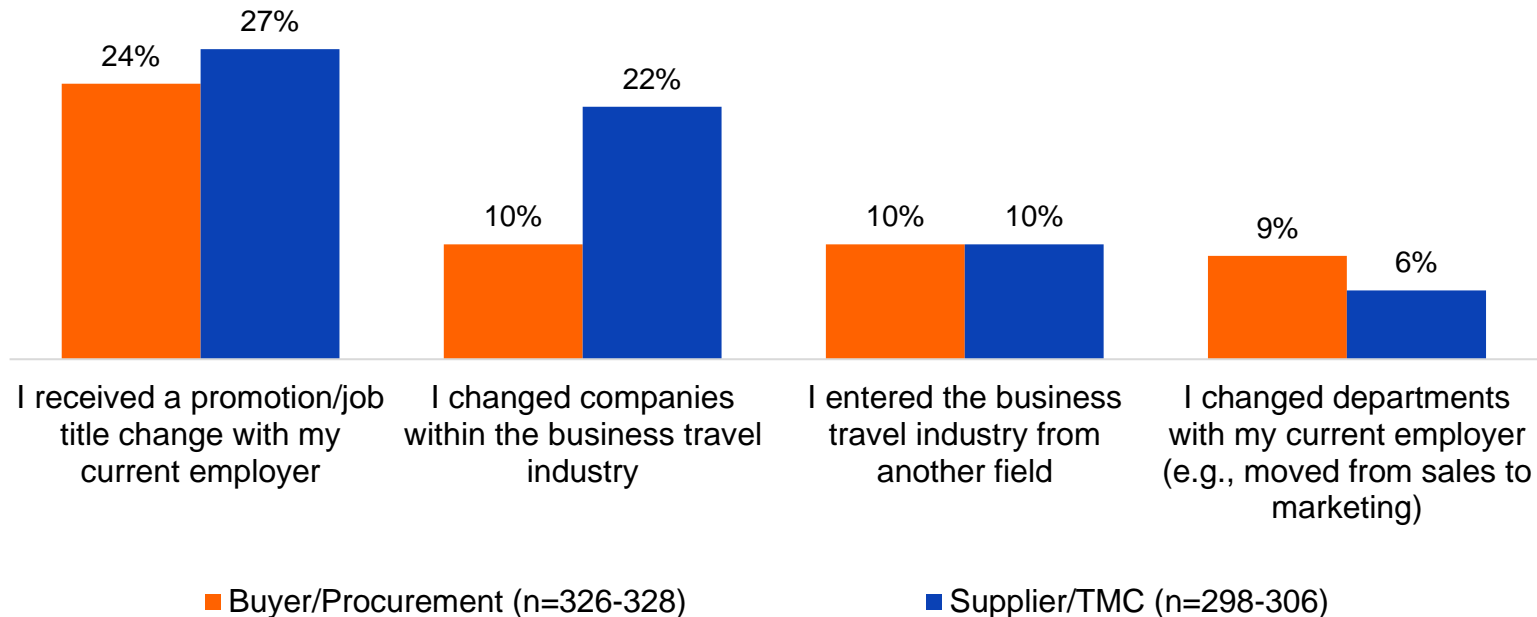
The COVID-19 pandemic disrupted travel careers. Business travel professionals lost jobs, took pay cuts, and changed companies. Even in the aftermath of the pandemic, there was an unusually high degree of turnover. The industry continues to experience transformation. This includes (1) airlines restructuring sales departments and (2) TMC mergers which have implications for staffing.

Yet overall, the past year has been defined by career advancement more than disruption. Turnover appears to have subsided. Fewer than one in five business travel professionals (16%) changed companies in the past year. A larger number (25%) received a promotion or job title change with their current employer.

While stability has returned, the industry struggles to recruit new talent. Only 11% of survey respondents entered the industry from a different field in the past year.

Suppliers Were Much More Likely to Change Companies in the Past Year

Thinking about your own role, did the following happen in the past year?
% "yes" by respondent type

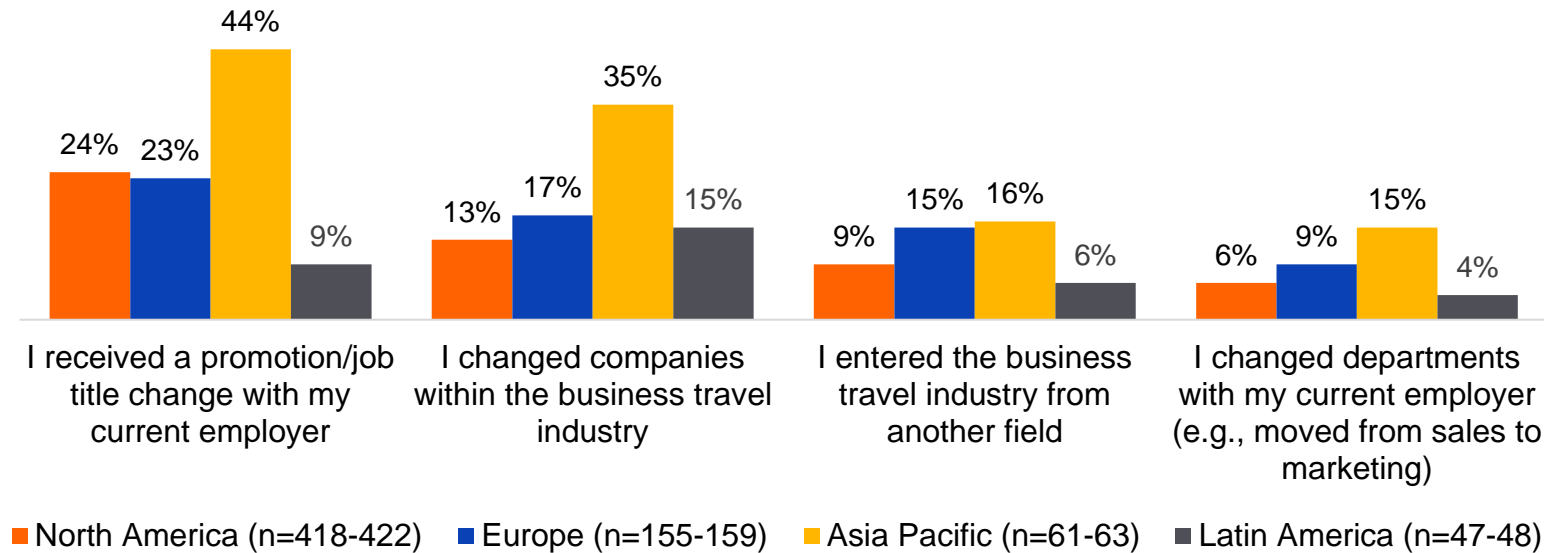


Q. Thinking about your own role, did the following happen in the past year?

Suppliers were more likely to change companies. More than one in five supplier/TMC employees (22%) changed companies in the past year. This compares to fewer buyers (10%). However, it is not clear if supplier roles *typically* have more turnover, or if it is because of anomalous recent events such as TMC mergers.

In Asia Pacific, Major Career Events Were More Common

Thinking about your own role, did the following happen in the past year?
% "yes" by respondent type



Q. Thinking about your own role, did the following happen in the past year?



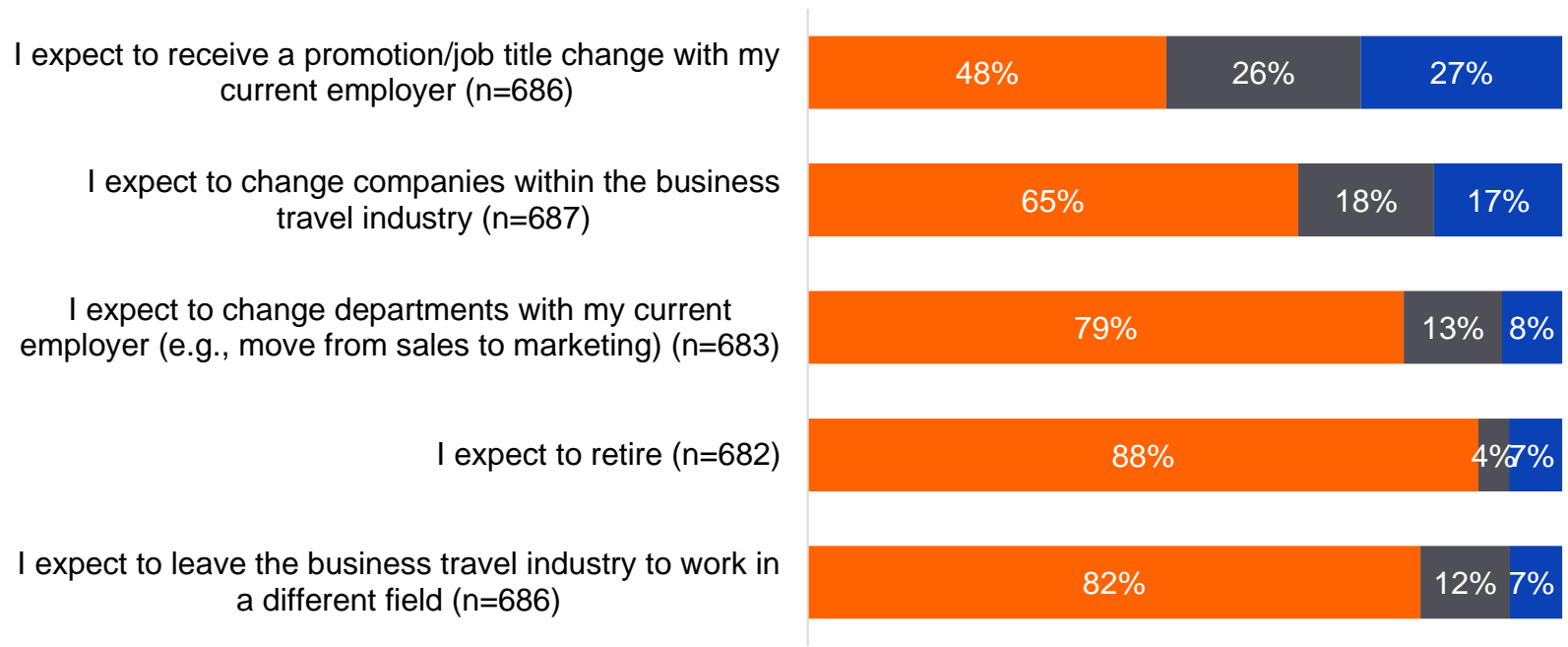
For business travel professionals in the Asia Pacific region, the past year has been marked by change. More than two in five professionals (44%) in the region received a promotion or job title change with their current employer in the past year. More than one-third (35%) changed companies within the business travel industry.

These figures are substantially higher in Asia Pacific than other regions. While business travel in APAC has taken longer to recover from the COVID-19 pandemic, the recovery is in full swing. Travel companies appear to be aggressively competing for talent. Business travel professionals in the Asia Pacific region might have more leverage to ask for a raise or promotion than they do in other regions.

Seven Percent of Business Travel Professionals Expect to Retire in the Next Year

Thinking about the year ahead, what is the likelihood that you will make the following career changes?

■ Not likely/Not likely at all
 ■ Neither likely nor unlikely
 ■ Somewhat likely/Very likely



Q. Thinking about the year ahead, what is the likelihood that you will make the following career changes?

In addition to career transitions that recently *happened*, respondents were asked about transitions they *expect* will happen in the next year.

One-quarter of business travel professionals (27%) expect to receive a promotion/job title change with their current employer. This is fairly similar to the share (25%) who actually received one in the past year (see page 18).

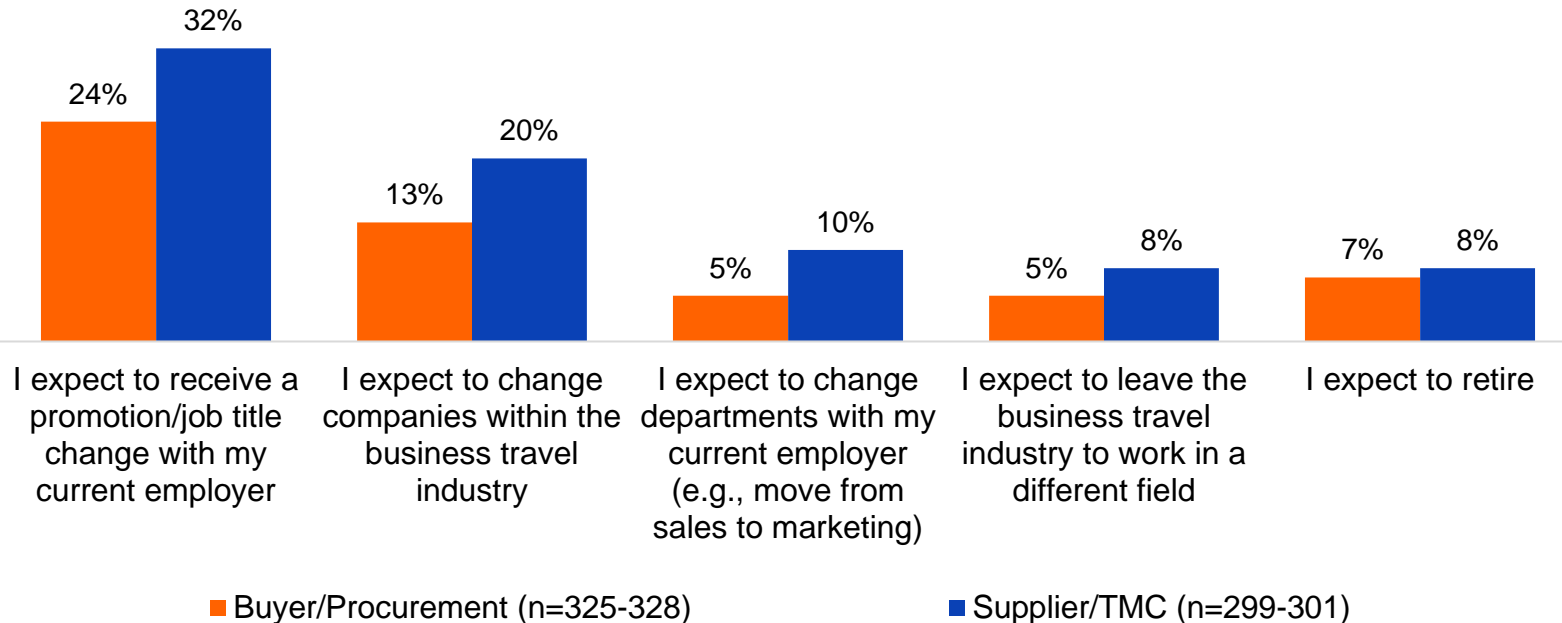
Seventeen percent of business travel professionals expect to change companies which is almost identical to the share (16%) who actually did so in the past year.

While a lot of attention has been paid to the aging of Baby Boomers in the workforce, only 7% of respondents expect to retire in the next year.

Suppliers Are More Likely to Expect a Promotion

Thinking about the year ahead, what is the likelihood that you will make the following career changes?

% "likely" or "very likely" by respondent type



Q. Thinking about your own role, did the following happen in the past year?

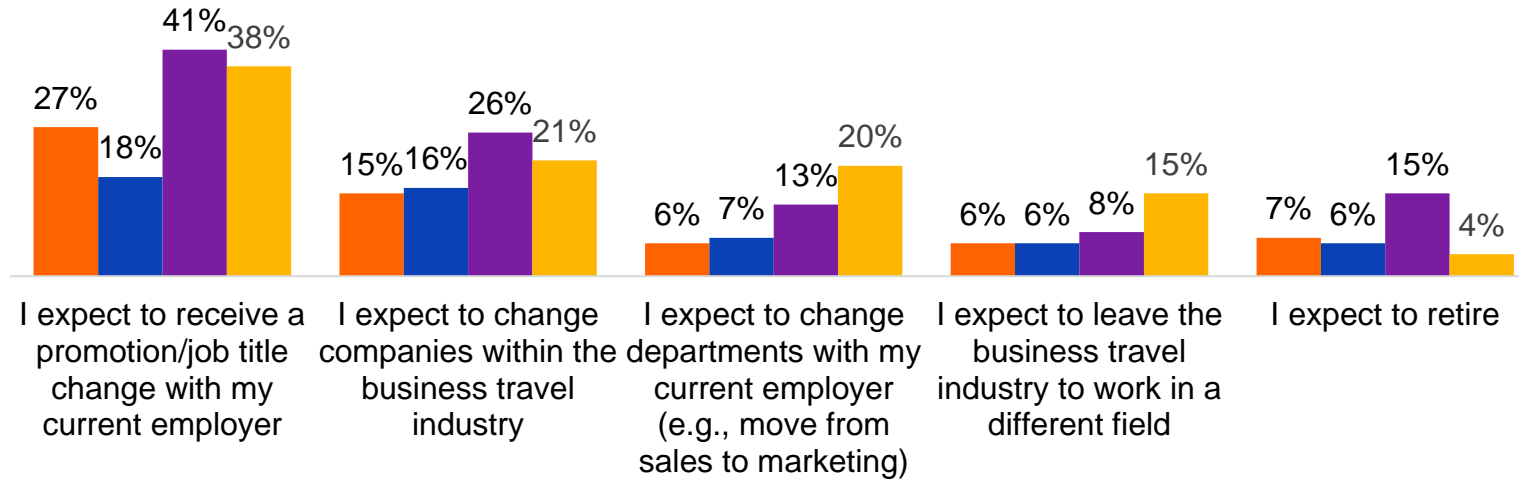
Buyers and suppliers have differing career expectations for the upcoming year.

Supplier/TMC employees (32%) are more likely than buyers (24%) to expect a promotion or title change. This would mark a departure from the previous year when the two groups were about equally likely to actually receive one (see page 19).

A larger number of suppliers (20%) than buyers (13%) expect to change companies. This would mark the continuation of a trend seen over the past year where suppliers were more likely to actually change companies.

APAC-Based Business Travel Professionals Are Most Likely to Expect Career Transitions in the Year Ahead

Thinking about the year ahead, what is the likelihood that you will make the following career changes?
% "likely" or "very likely" by respondent type



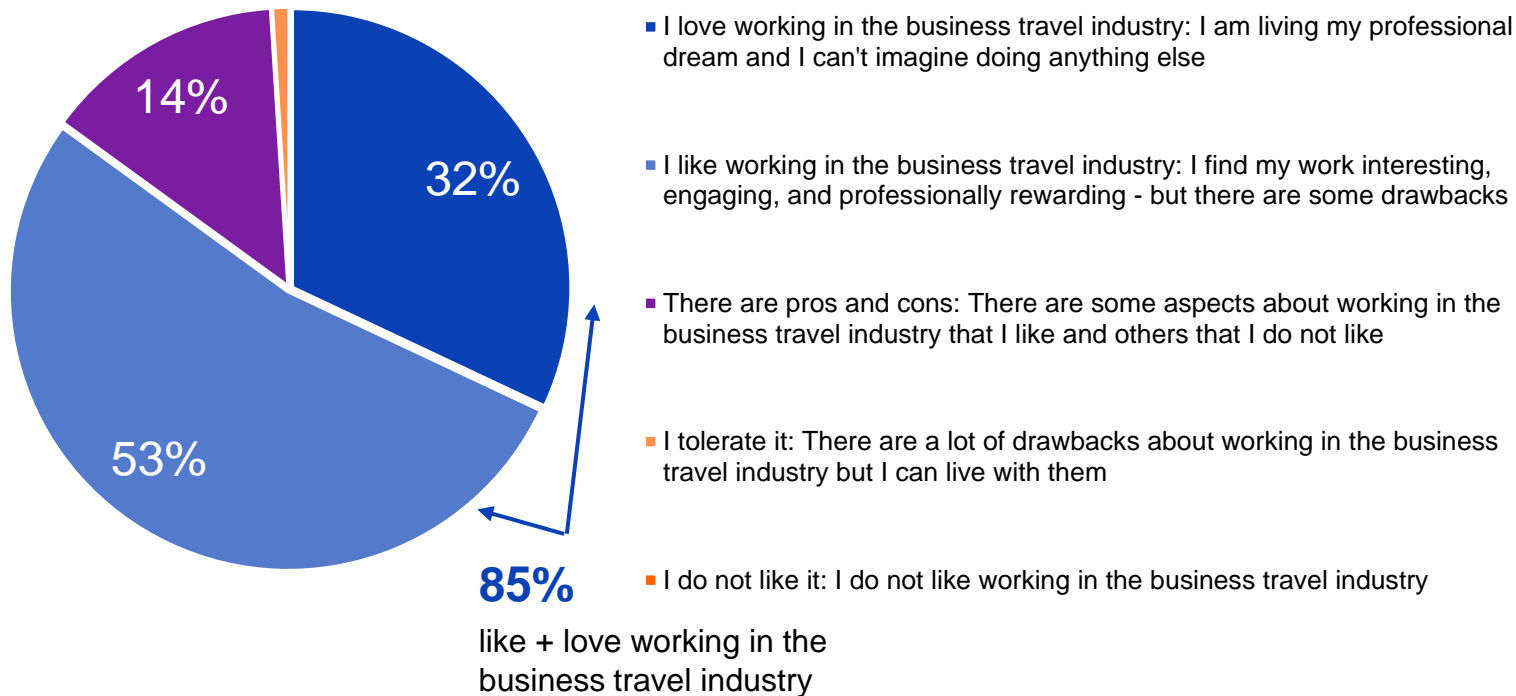
■ North America (n=415-418) ■ Europe (n=154) ■ Asia Pacific (n=61-62) ■ Latin America (n=46-47)

Q. Thinking about your own role, did the following happen in the past year?

Last year, Asia Pacific-based business travel professionals were more likely to experience career transitions (see page 20). Respondents in the region expect this trend will continue in the year ahead. They are more likely than other respondents to expect to change companies, or receive a promotion/title change.

Business Travel Professionals Largely Enjoy Working in the Industry

How would you rate your career in the business travel industry?



Q. How would you rate your career in the business travel industry? Pick one. (n=675)

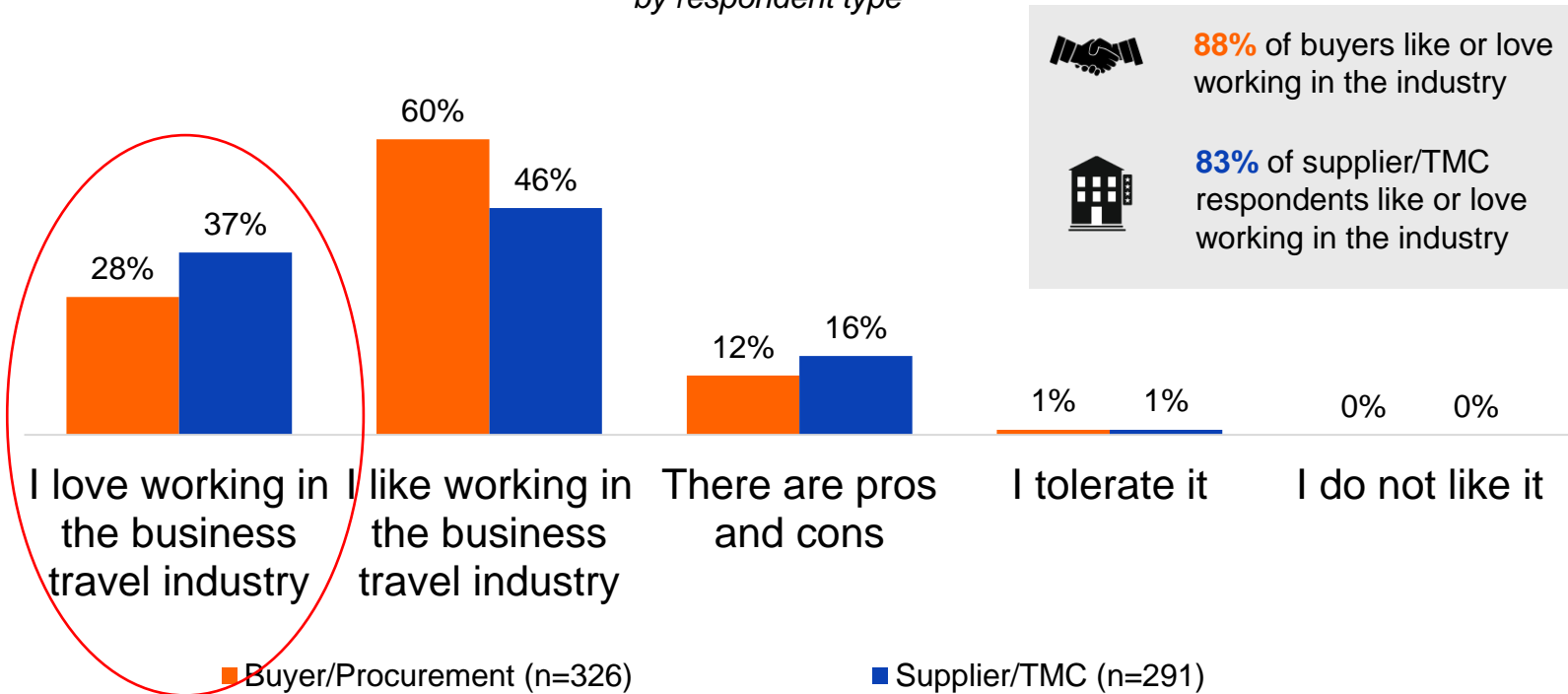
Note: A similar version of this question was asked in a survey of North America and Europe-based travel managers conducted last year for a report titled *the Life and Times of a Corporate Travel Manager*. The question was re-purposed for the poll in order to gather data from (1) travel suppliers in addition to buyers and (2) gather data from buyers outside of North America and Europe

Business travel professionals largely enjoy working in the industry. A large majority (85%) like (53%) or love (32%) working in business travel.

Buyers and Suppliers Enjoy Working in Business Travel

How would you rate your career in the business travel industry?

by respondent type



Buyers and suppliers enjoy working in business travel. A similar number from each group like or love working in the industry. However, a larger number of suppliers (37%) than buyers (28%) say they love it.

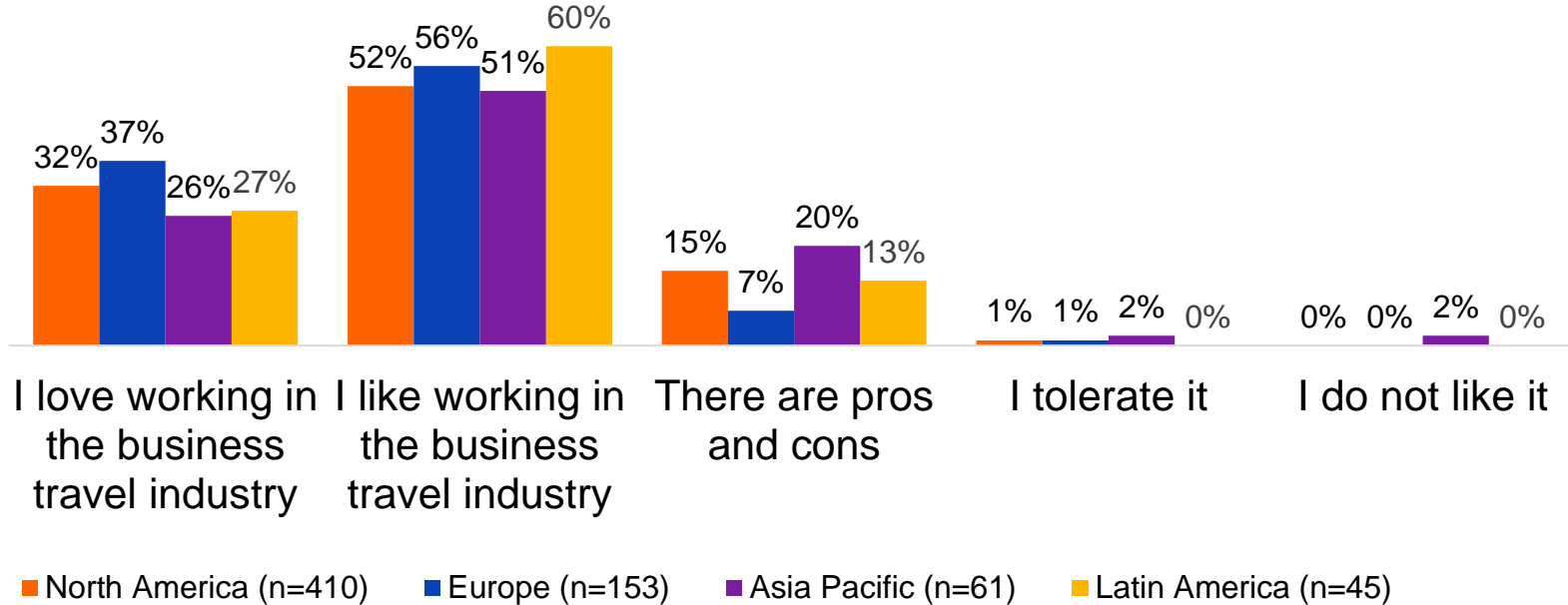
Q. How would you rate your career in the business travel industry? Pick one.

Note: Response options shortened for brevity; see previous page for full text displayed to respondents

Across the World, Business Travel Professionals Enjoy Their Work

How would you rate your career in the business travel industry?

by respondent type



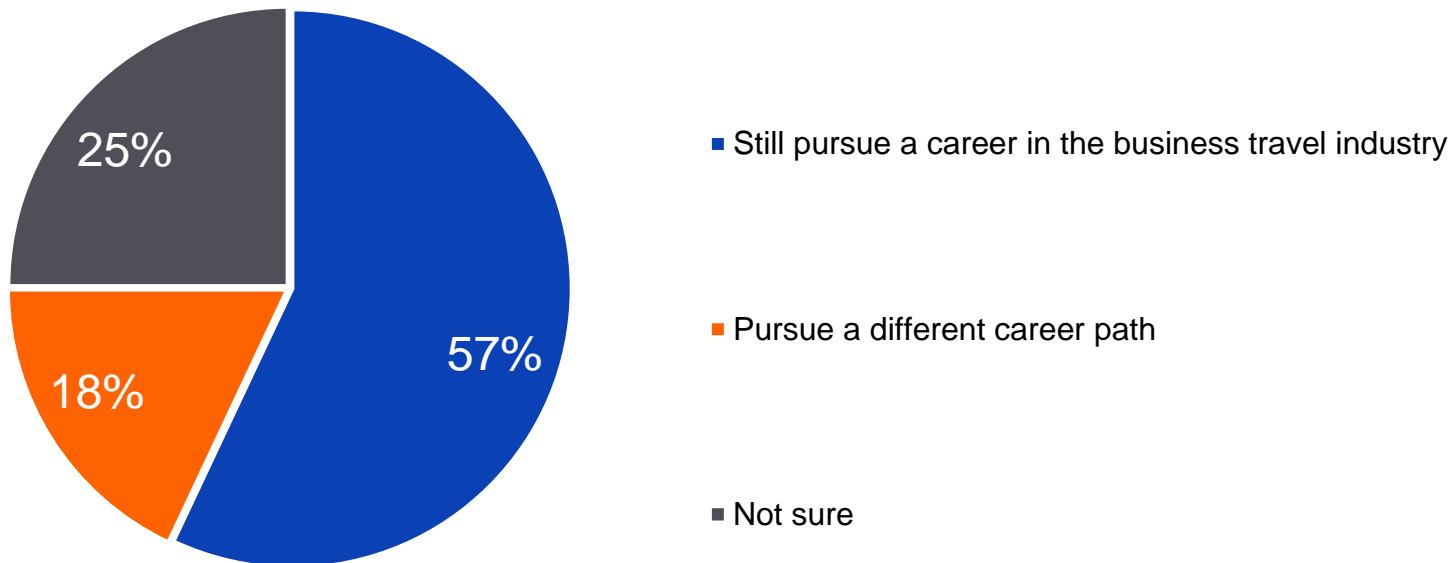
Regardless of region, a substantial majority of business travel professionals enjoy working in the industry. However, professionals in Asia Pacific (24%) are most likely to say there are pros and cons (20%) or they tolerate/do not like (4%) working in the industry.

Q. How would you rate your career in the business travel industry? Pick one.

Note: Response options shortened for brevity; see page 24 for full text displayed to respondents

Business Travel Professionals Do Not Regret Career Choice

If you could go back in time (before you had an established career), would you...?



If they could go back in time, more than half of business travel professionals (57%) would still pursue a career in the industry. Only 18% would pursue a different career path.

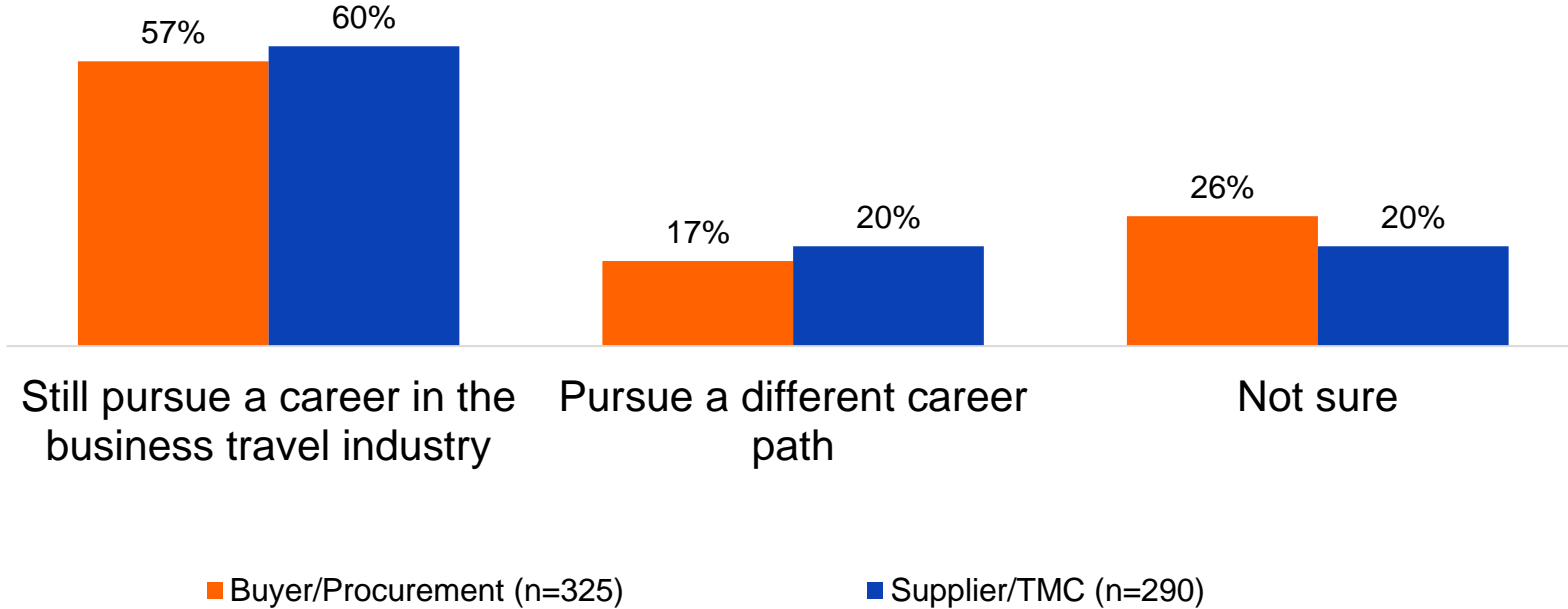
Q. If you could go back in time (before you had an established career), would you...? (n=673)

Note: The same question was asked in a survey of North America and Europe-based travel managers conducted last year for a report titled *the Life and Times of a Corporate Travel Manager*. The question was re-purposed for the poll in order to gather data from (1) travel suppliers in addition to buyers and (2) gather data from buyers outside of North America and Europe

Buyers and Suppliers Would Still Pursue a Career in Business Travel

How would you rate your career in the business travel industry?

by respondent type



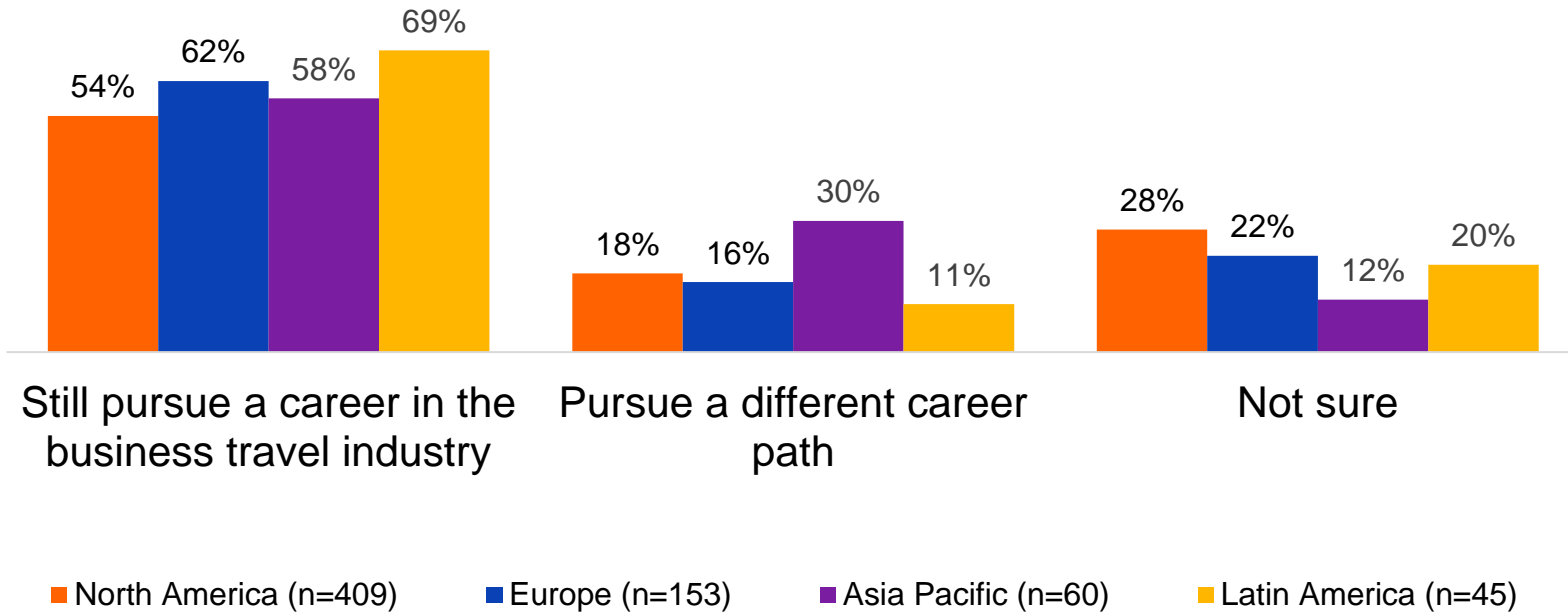
If they could go back in time, a similar number of buyers (57%) and suppliers (60%) would still pursue a career in the industry.

Q. If you could go back in time (before you had an established career), would you...?

Regardless of Region, Most Business Travel Professionals Would Still Pursue a Career in the Industry

How would you rate your career in the business travel industry?

by respondent type

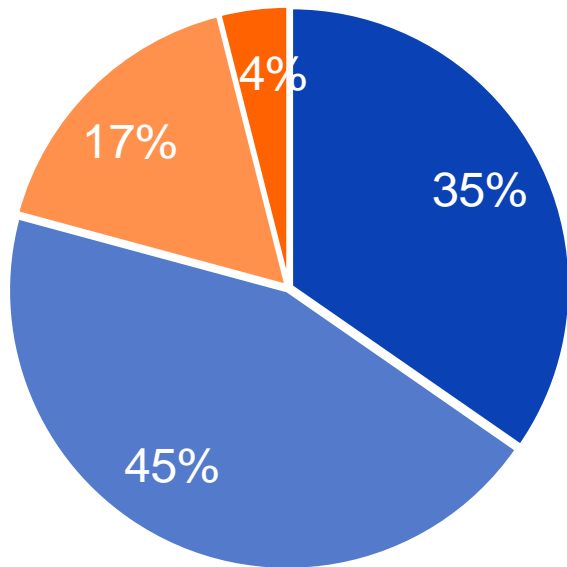


In all four regions surveyed, most business travel professionals would still pursue a career in business travel. However, respondents in Asia Pacific are most likely to say they would pursue a different career path.

Q. If you could go back in time (before you had an established career), would you...?

Business Travel Careers Afford Work-Life Balance

Thinking about your current role, would you say...?



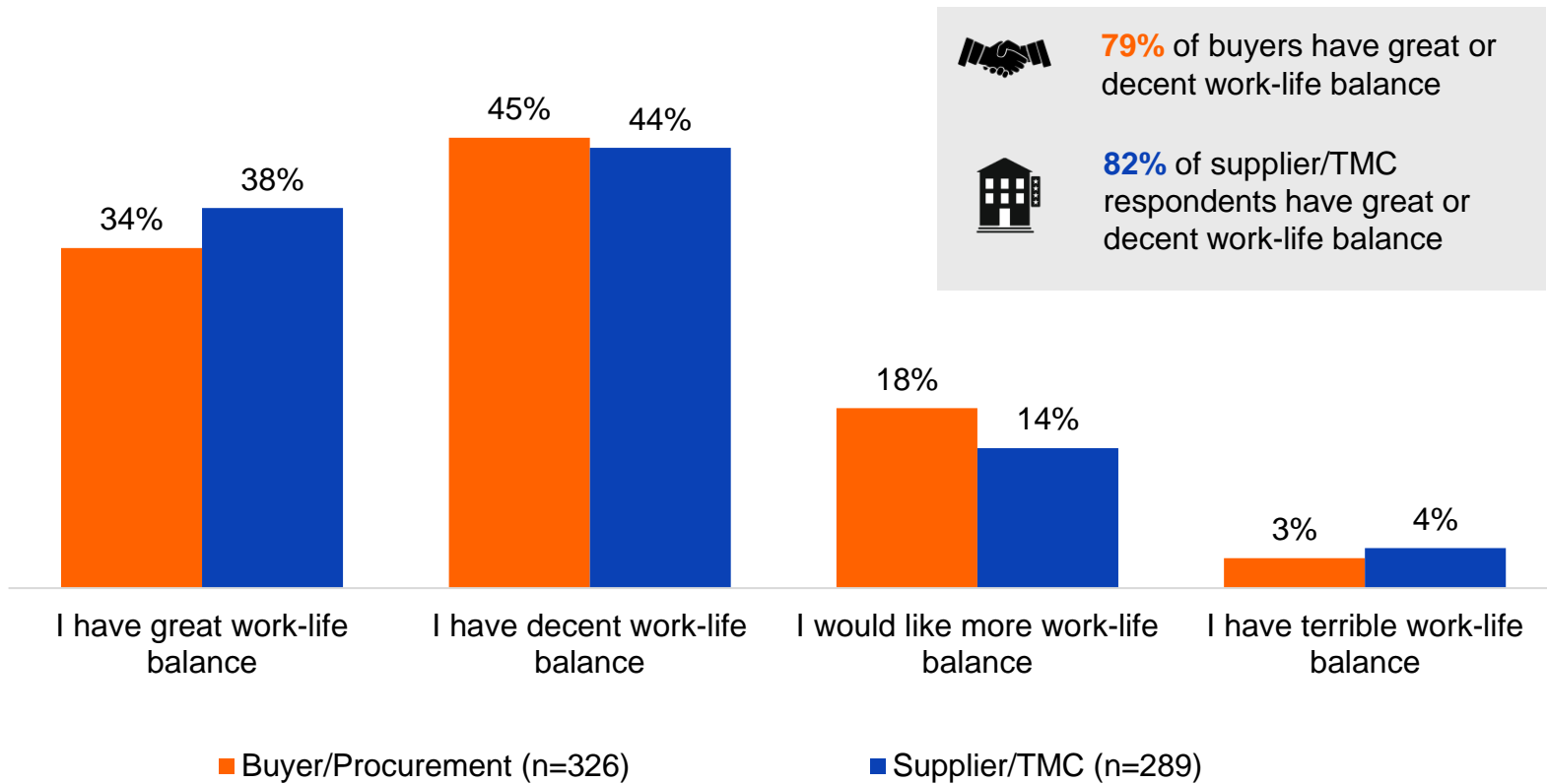
- I have great work-life balance: I work reasonable hours and I can typically take vacation/personal time when I want to
- I have decent work-life balance: I typically work reasonable hours but sometimes work longer than I want to; I typically can take vacation/personal time when I want to
- I would like more work-life balance: I often work longer hours than I would like to; or I sometimes cannot take vacation/personal time because I am too busy
- I have terrible work-life balance: I almost always work longer hours than I want to or cannot take vacation/personal time because I am too busy

Q. Thinking about your current role, would you say...? (n=673)

Most business travel professionals (80%) have great (35%) or decent (45%) work-life balance in their current role.

Buyers and Suppliers Have Similar Perceptions of Work-Life Balance

Thinking about your current role, would you say...?
by respondent type



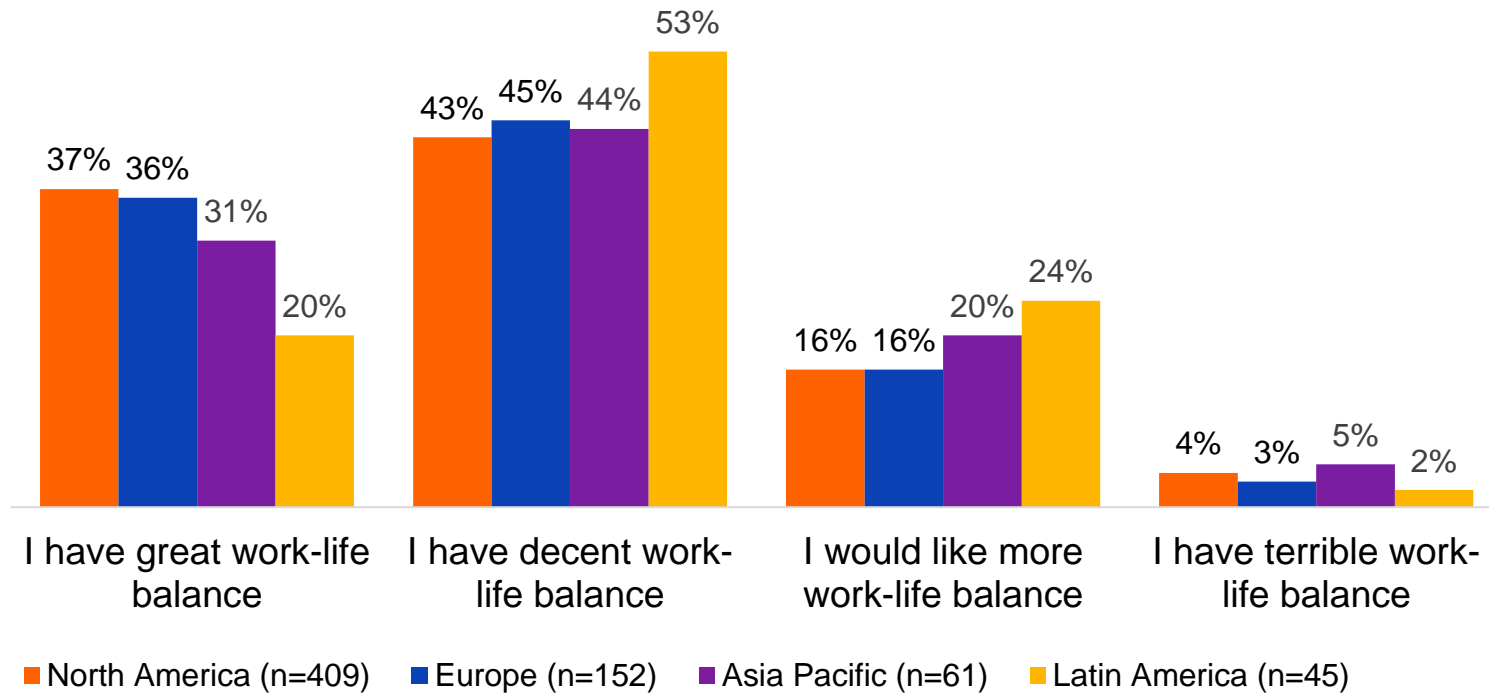
Buyers and suppliers have similar work-life balance. A similar number of buyers (79%) and suppliers (82%) feel they have great or decent work-life balance.

Q. Thinking about your current role, would you say...?

Note: Response options shortened for brevity; see previous page for full text displayed to survey respondents

Across the World, Business Travel Professionals Say They Have Decent Work-Life Balance

Thinking about your current role, would you say...?
by region



Across the world, business travel professionals have decent work-life balance. However, Latin America-based business travel professionals are least likely to say they have great work-life balance.

Q. Thinking about your current role, would you say...?

Note: Response options shortened for brevity; see page 30 for full text displayed to survey respondents

The Travel Manager's Role

Last year, GBTA released a study titled the *Power of One*. The study examined travel manager involvement with cross-functional responsibilities. These are areas where travel managers collaborate with other stakeholders. The study examined the degree of travel program involvement. How often do travel programs actually *own* these functions?

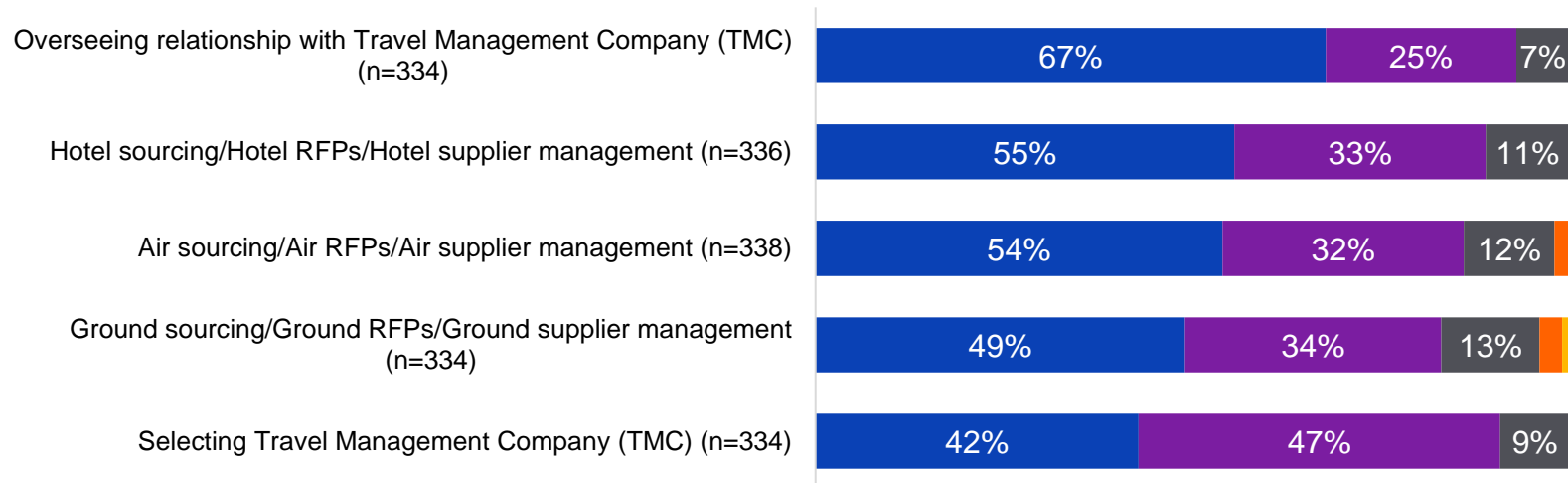
A key goal of the poll was to examine this topic more closely.



Travel Program Decisions

Thinking about the following functions at your organization, how would you describe the travel program's role?

- Lead decisionmaker
- Program lead and one of several decisionmakers
- Consulted stakeholder but not decisionmaker or program lead
- Indirectly involved/Aware
- Not involved



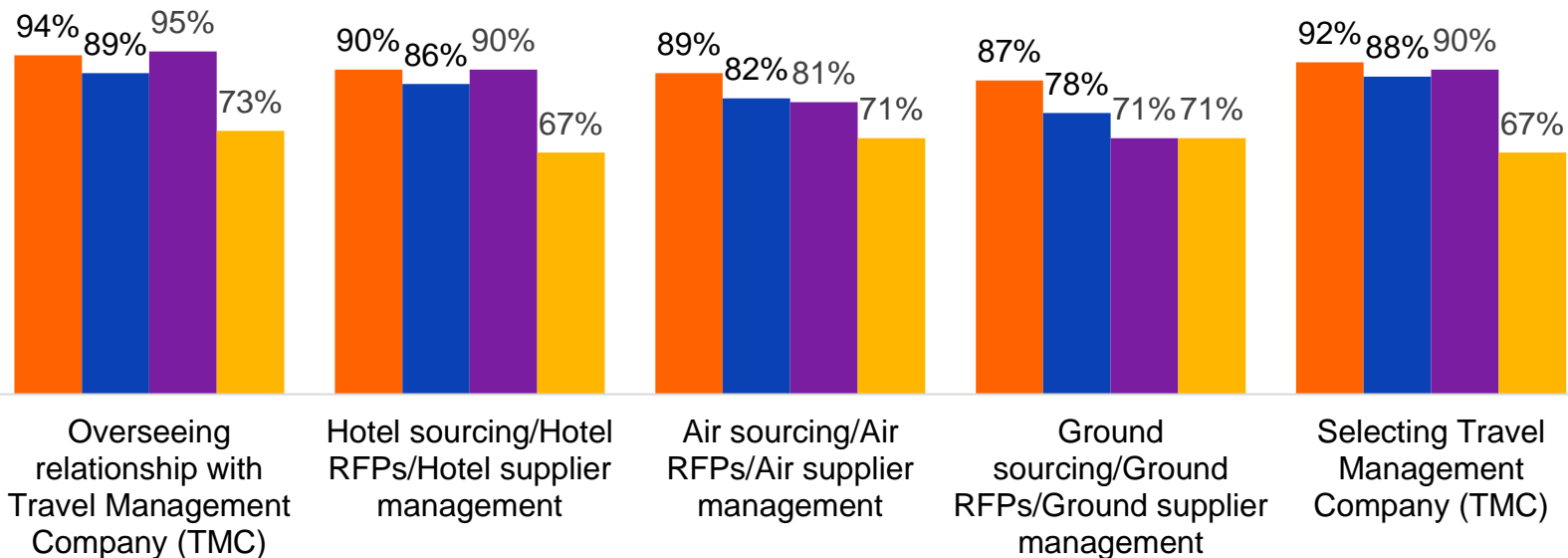
Travel managers generally have autonomy over the actual travel program. In other words, they make key decisions about travel suppliers and vendors. They do not merely execute decisions made by others. Travel managers themselves typically are the lead decisionmakers when it comes to choosing preferred airlines, hotels, and ground vendors. However, they do not always have final say when it comes to choosing a TMC. Two in five buyers (42%) say the travel program is the lead decisionmaker when it comes to selecting the TMC. A similar number (47%) say the travel program is one of several decisionmakers.

The Travel Buyer's Perspective

Travel Program Decisions

Thinking about the following functions at your organization, how would you describe the travel program's role?

by "lead decisionmaker" or "program lead and one of several decisionmakers" by region



■ North America (n=199-204) ■ Europe (n=87-88) ■ Asia Pacific (n=21*) ■ Latin America (n=21-22*)

Q. Thinking about the following functions at your organization, how would you describe the travel program's role?

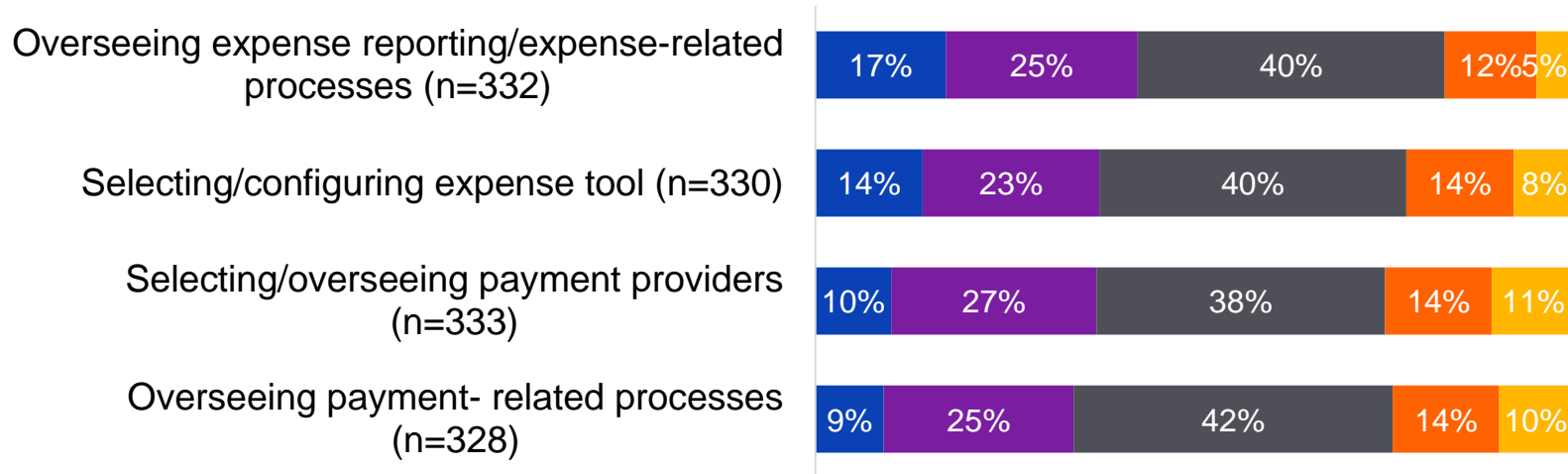
*indicates small sample size for buyers in Asia Pacific and Latin America (n<30)

There are only minor regional differences when it comes to travel program autonomy.

Payment and Expense

Thinking about the following functions at your organization, how would you describe the travel program's role?

- Lead decisionmaker
- Program lead and one of several decisionmakers
- Consulted stakeholder but not decisionmaker or program lead
- Indirectly involved/Aware
- Not involved



Two in five travel programs (42%) have some degree of ownership when it comes to expense reporting and related processes. This includes those that are lead decisionmakers (17%) and those that are one of several decisionmakers (25%).

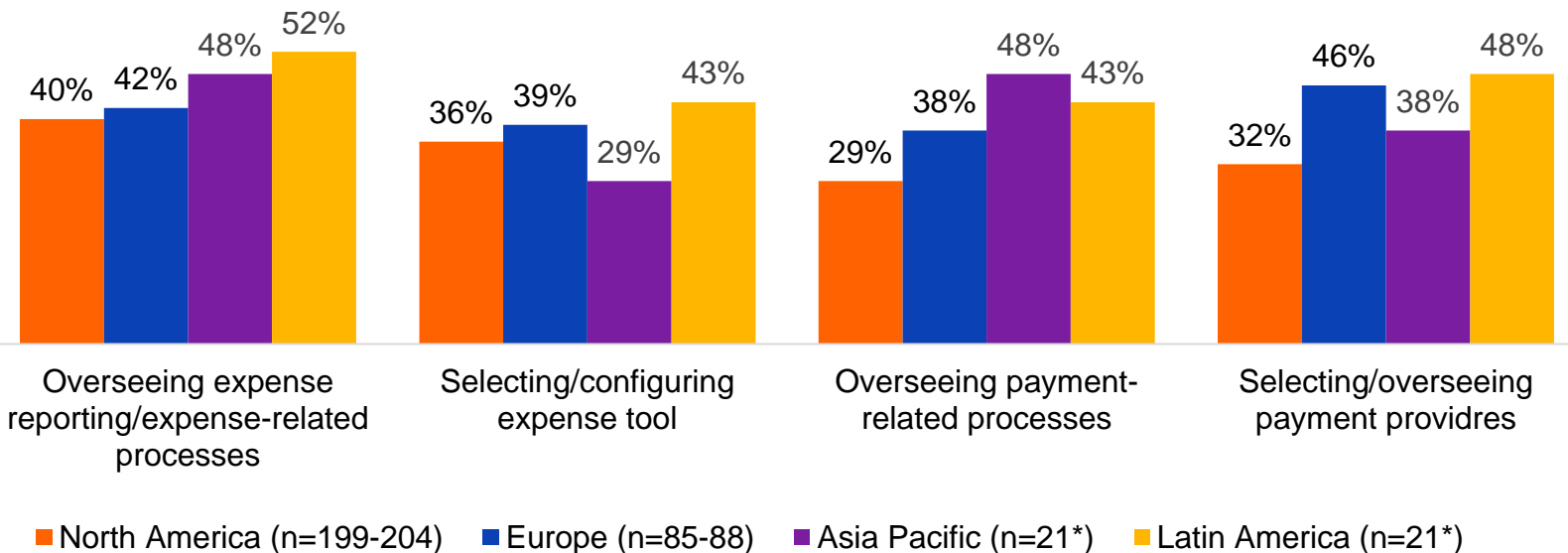
Similarly, one-third (34%) have some ownership of payment-related processes. This includes one in 10 (9%) that are lead decisionmakers and one-quarter (25%) that are one of several decisionmakers.

The **Travel Buyer's** Perspective

Payment and Expense (Cont.)

Thinking about the following functions at your organization, how would you describe the travel program's role?

by "lead decisionmaker" or "program lead and one of several decisionmakers" by region



North American travel programs are least likely to be have ownership of payment.

Fewer than one-third of North American buyers (29%) say the travel program has some ownership of payment-related processes. This is lower than the share in every other region. Similarly, North American travel programs (32%) are less likely than their European counterparts (46%) to have ownership of selecting payment providers.

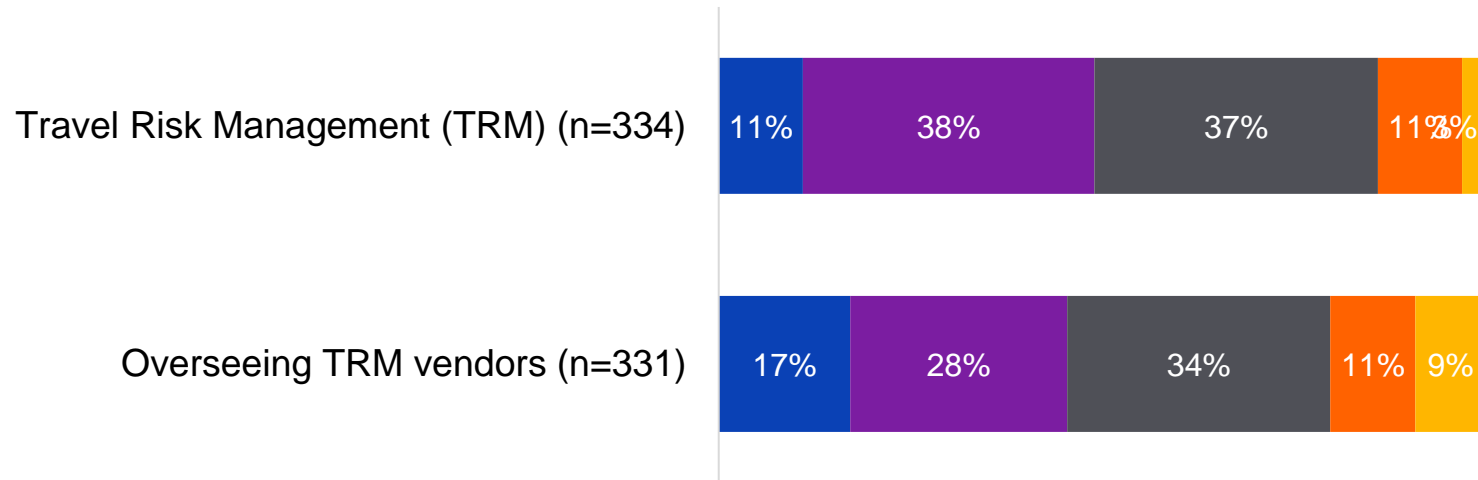
Q. Thinking about the following functions at your organization, how would you describe the travel program's role?

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

Travel Risk Management (TRM)

Thinking about the following functions at your organization, how would you describe the travel program's role?

- Lead decisionmaker
- Program lead and one of several decisionmakers
- Consulted stakeholder but not decisionmaker or program lead
- Indirectly involved/Aware
- Not involved



Travel programs have varying involvement with risk management. Only 11% of buyers say the travel program is the lead decisionmaker when it comes to Travel Risk Management (TRM). However, a decent number (38%) say the travel program is one of several decisionmakers.

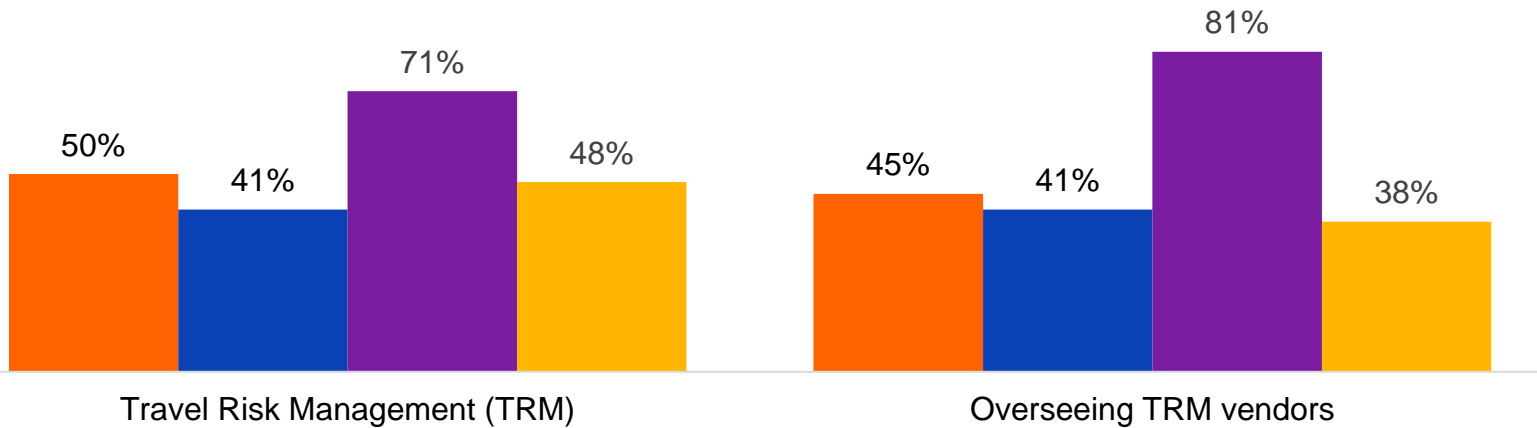
Even when the travel program does not make decisions, it often plays a supporting role. More than one-third of buyers (38%) say the travel program is a consulted stakeholder (37%) when it comes to TRM.

The **Travel Buyer's** Perspective

Travel Risk Management (Cont.)

Thinking about the following functions at your organization, how would you describe the travel program's role?

by "lead decisionmaker" or "program lead and one of several decisionmakers" by region



■ North America (n=200-202) ■ Europe (n=85-86) ■ Asia Pacific (n=21*) ■ Latin America (n=21*)

Q. Thinking about the following functions at your organization, how would you describe the travel program's role?

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

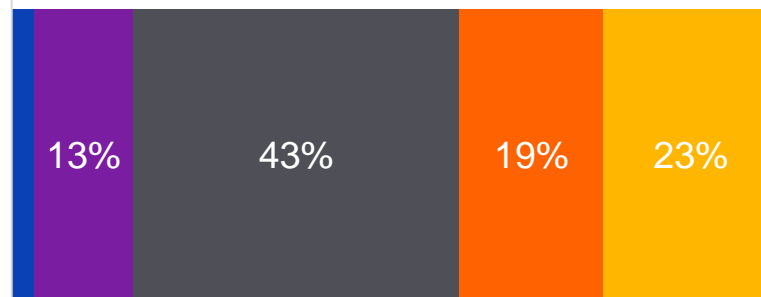
Travel programs in the Asia Pacific region are most likely to have ownership of TRM.

Workforce Mobility/Employee Relocations

Thinking about the following functions at your organization, how would you describe the travel program's role?

- Lead decisionmaker
- Program lead and one of several decisionmakers
- Consulted stakeholder but not decisionmaker or program lead
- Indirectly involved/Aware
- Not involved

Workforce mobility/employee relocations
(n=327)



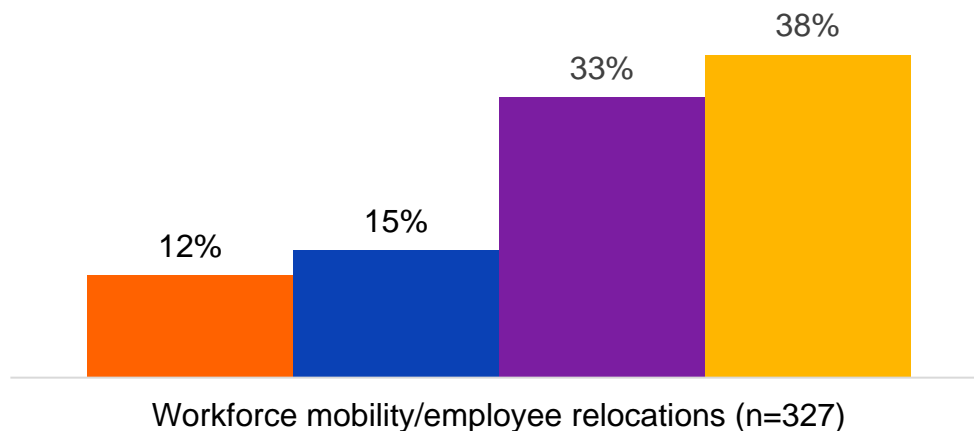
In an increasingly global world, companies move talent across borders. The company might arrange work visas, moving services, and long-term housing for relocating employees.

Travel programs have limited involvement with relocations. One-quarter of buyers (23%) say the travel program is not involved. When the travel program is involved, it typically plays a supporting role.

Workforce Mobility/Employee Relocations (Cont.)

**Thinking about the following functions at your organization,
how would you describe the travel program's role?**

by "lead decisionmaker" or "program lead and one of several decisionmakers" by region



■ North America (n=196) ■ Europe (n=85) ■ Asia Pacific (n=21*) ■ Latin America (n=21*)

Regardless of region, few travel programs have ownership of workforce mobility/employee relocations.

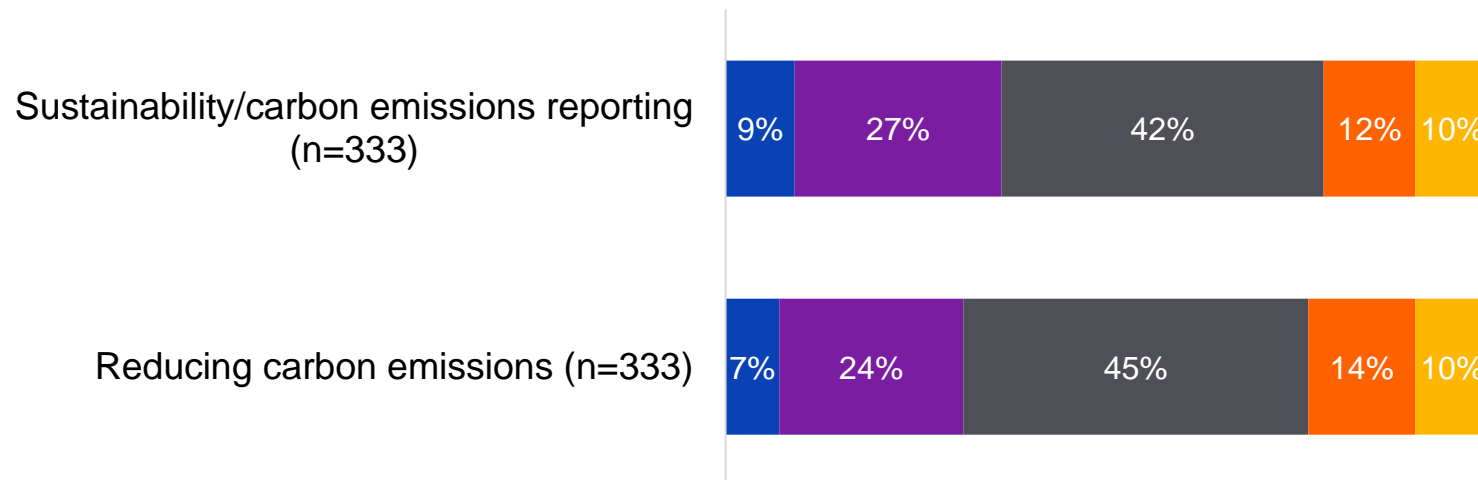
Q. Thinking about the following functions at your organization, how would you describe the travel program's role?

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

Sustainability

Thinking about the following functions at your organization, how would you describe the travel program's role?

- Lead decisionmaker
- Program lead and one of several decisionmakers
- Consulted stakeholder but not decisionmaker or program lead
- Indirectly involved/Aware
- Not involved



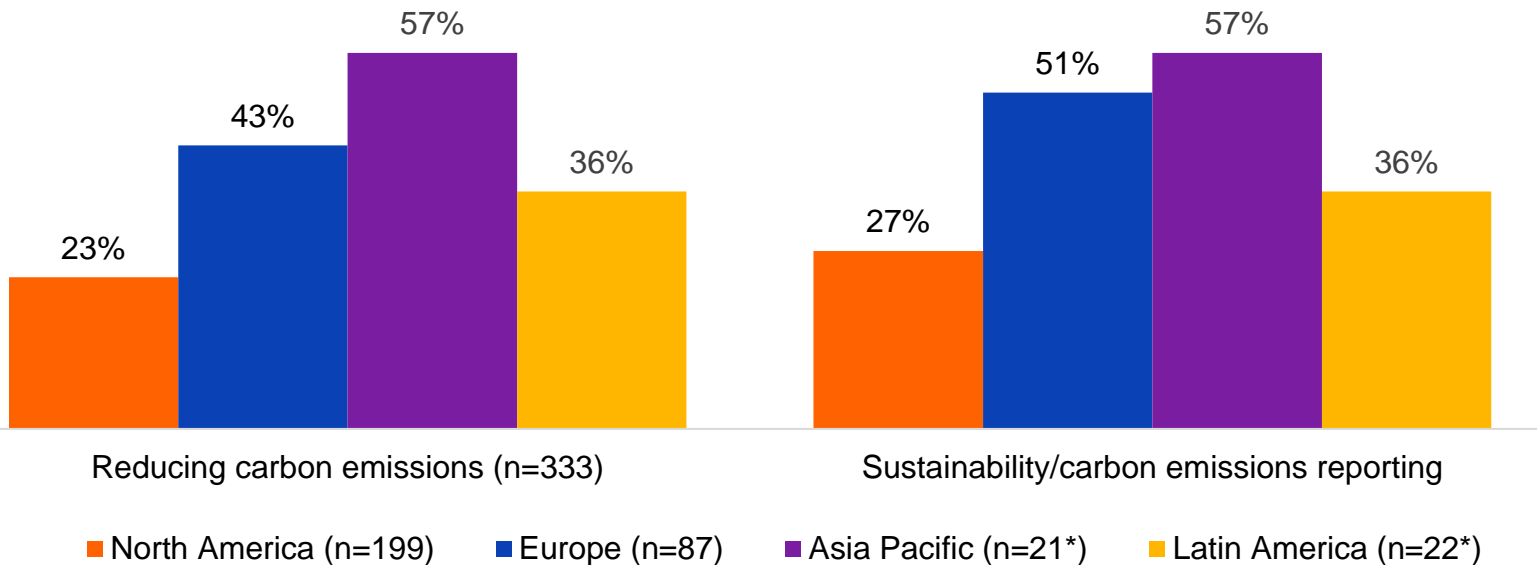
Travel programs work closely with sustainability teams at their company.

Typically, the travel program plays a supporting role. Most buyers say the travel program is a consulted stakeholder—or indirectly involved—with reducing emissions (59%) or emissions reporting (54%) at their company.

Sustainability (Cont.)

Thinking about the following functions at your organization, how would you describe the travel program's role?

by "lead decisionmaker" or "program lead and one of several decisionmakers" by region



In Europe and Asia Pacific, travel programs are more proactively involved with sustainability initiatives. A decent number of buyers in these regions say the travel program has ownership of reducing carbon emissions. They are more likely than buyers in North America and Latin America to say so.

Q. Thinking about the following functions at your organization, how would you describe the travel program's role?

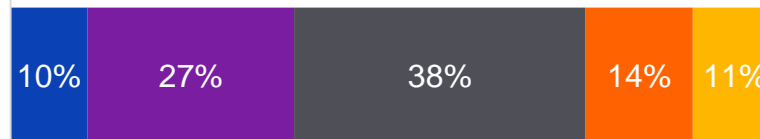
***indicates small sample size for buyers in Asia Pacific and Latin America (n<30)**

Meetings Management

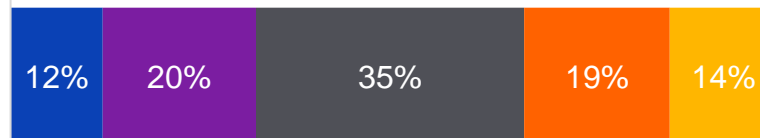
Thinking about the following functions at your organization, how would you describe the travel program's role?

- Lead decisionmaker
- Program lead and one of several decisionmakers
- Consulted stakeholder but not decisionmaker or program lead
- Indirectly involved/Aware
- Not involved

Selecting/booking venues for internal or external meetings and/or events, or conducting meeting and/or event RFPs (n=333)



Managing internal or external meetings and/or event operations: overseeing logistics, registration, content, vendors, etc. (n=329)



Travel programs are often involved with meetings management. Typically, they play a supporting role.

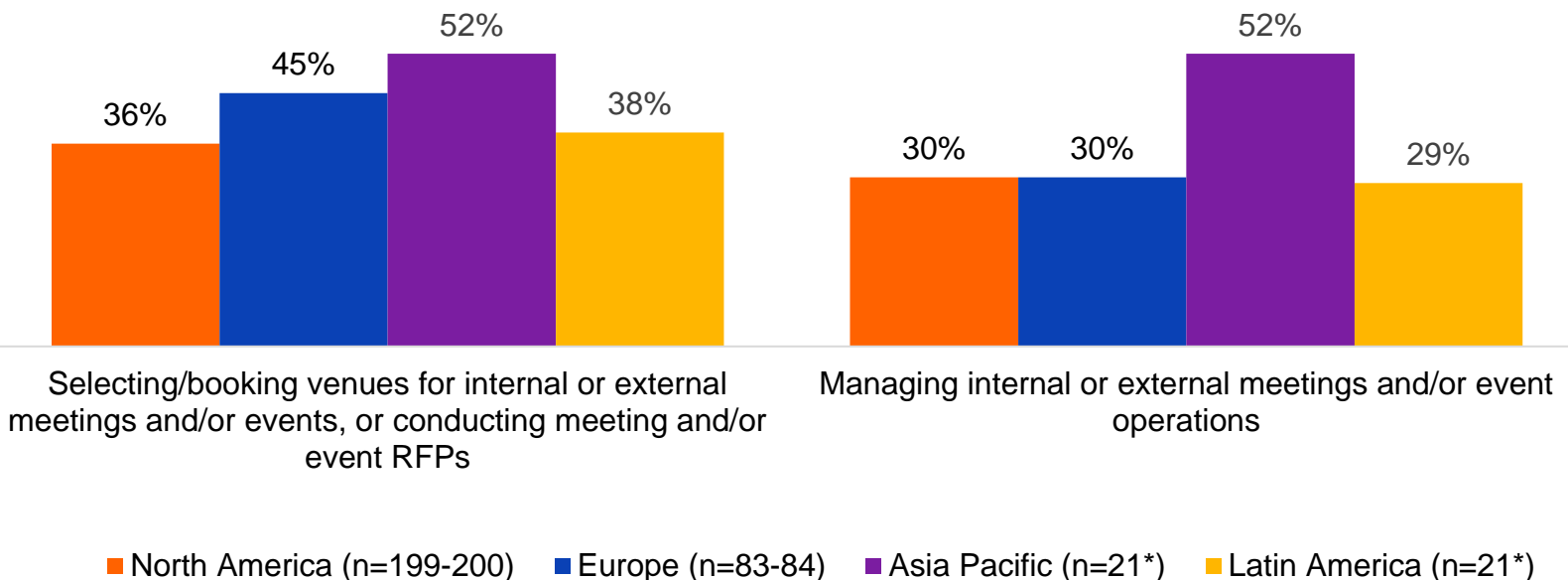
Almost two in five travel programs (39%) have some ownership when it comes to booking meeting venues. A larger number (50%) play a supporting role as a consulted stakeholder (33%) or an indirectly involved stakeholder (17%).

One-third of travel programs (32%) have some ownership when it comes to managing event operations or logistics. More often, they are a consulted stakeholder (35%) or indirectly involved (19%).

Meetings Management (Cont.)

Thinking about the following functions at your organization, how would you describe the travel program's role?

by "lead decisionmaker" or "program lead and one of several decisionmakers" by region



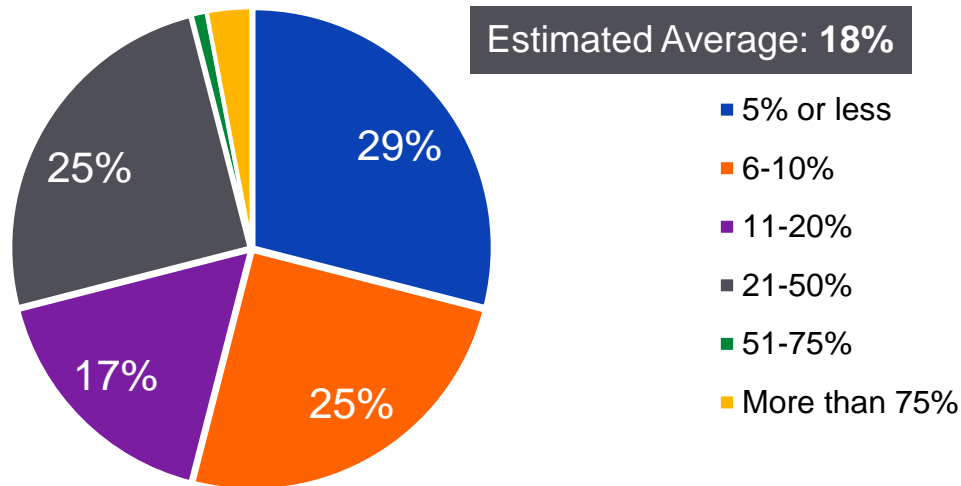
European travel programs (45%) are more likely than North American programs (36%) to have ownership of selecting meeting venues.

Q. Thinking about the following functions at your organization, how would you describe the travel program's role?

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

When Travel Managers Are Involved, They Estimate Spending 18% of Their Time on Meetings

You mentioned you are involved with planning, organizing, or selecting venues for meetings and/or events at your company. Thinking about these responsibilities, approximately what percentage of your time do you spend on them?



When travel managers are involved with meetings in a meaningful way, the time that they spend varies. On average, these travel managers estimate spending 18% of their time on meetings.

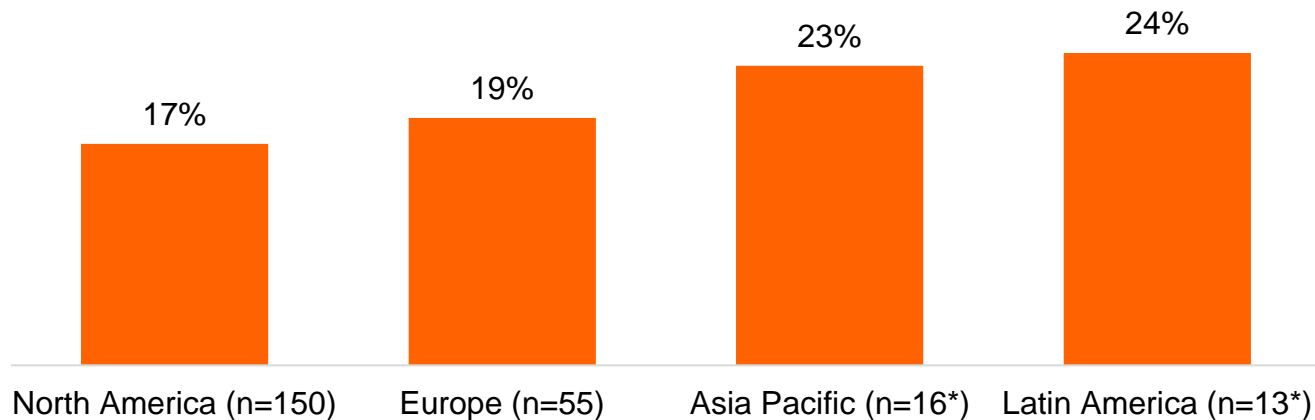
Q. You mentioned you are involved with planning, organizing, or selecting venues for meetings and/or events at your company. Thinking about these responsibilities, approximately what percentage of your time do you spend on them? **Note: Question only displayed to buyers/procurement professionals who indicated they are involved with selecting meeting venues OR managing meeting logistics as a lead decisionmaker, program lead, or consulted stakeholder (n=236)**

The **Travel Buyer's** Perspective

Regardless of Region, Travel Managers Spend a Similar Amount of Time on Meetings

Percentage of time spent on meetings

Average among travel managers who have meaningful involvement with meetings by region



Regardless of region, travel managers spend a similar amount of time on meetings

Q. You mentioned you are involved with planning, organizing, or selecting venues for meetings and/or events at your company. Thinking about these responsibilities, approximately what percentage of your time do you spend on them? **Note: Question only displayed to buyers/procurement professionals who indicated they are involved with selecting meeting venues OR managing meeting logistics as a lead decisionmaker, program lead, or consulted stakeholder (n=236)**



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New Distribution Capability (NDC)

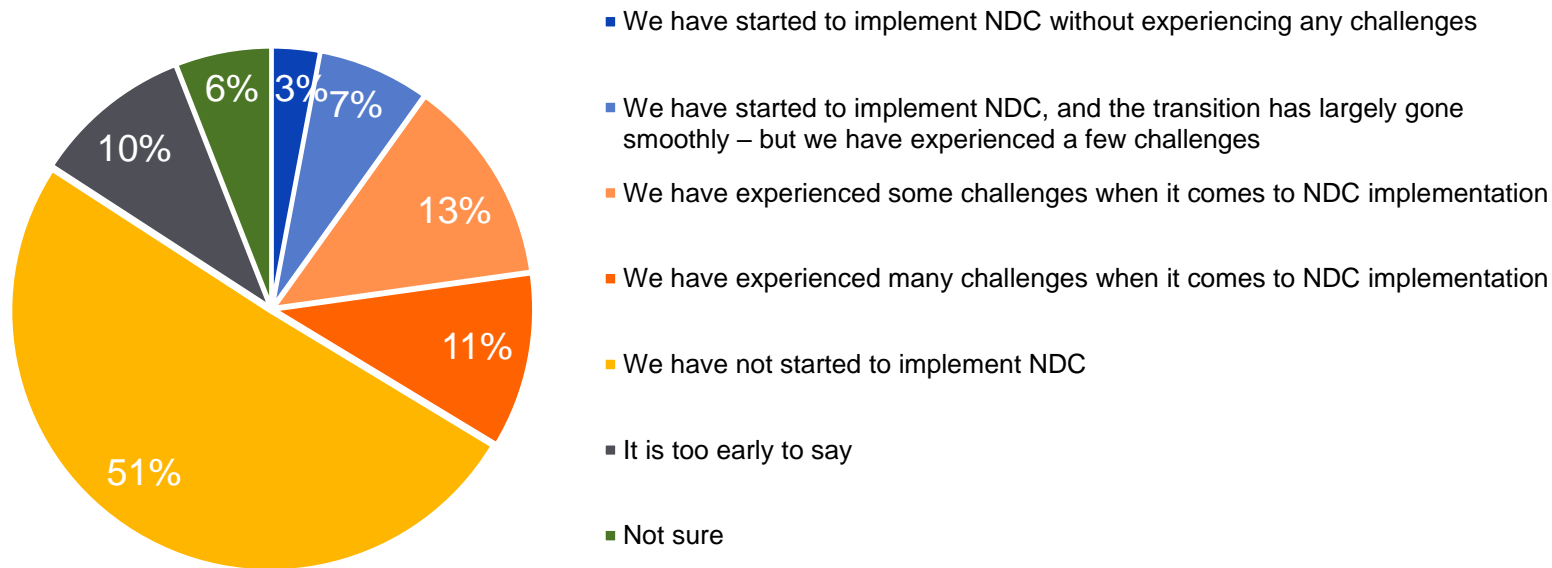


New Distribution Capability (NDC)

Every six months, the GBTA Business Travel Outlook Poll has tracked the industry's roll-out of "New Distribution Capability" (NDC). An explanation of NDC was included in the last Poll highlights report, and is reproduced in the Appendix of the current report (see page 60).

For Travel Buyers, Little Perceived Progress With NDC Roll-Out

Thinking about your travel program's implementation of NDC, which statement best represents your experience?
travel buyers only



Q. Thinking about your travel program's implementation of NDC, which statement best represents your experience?

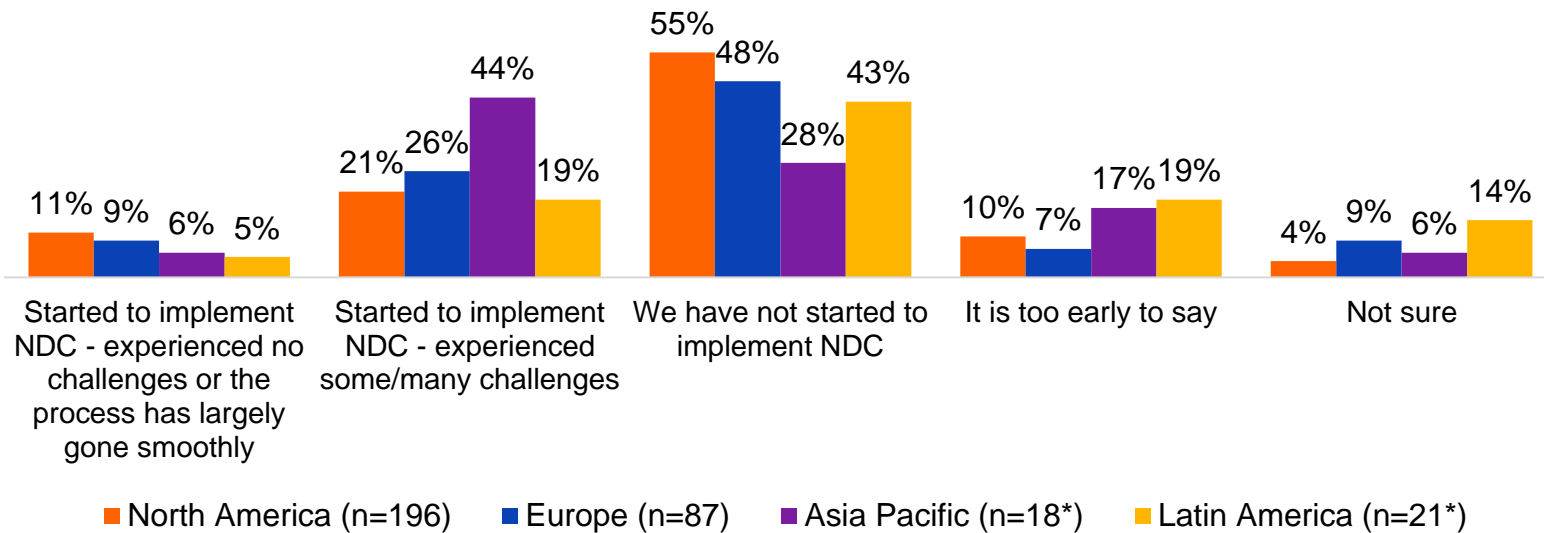
Note: Question only displayed to travel buyers/procurement professionals (n=326)

Travel buyers perceive little progress with NDC. Half of travel buyers (51%) say their program has **not** started to implement NDC. This is virtually identical to the share (50%) obtained six months ago in the October *GBTA Business Travel Outlook Poll*. However, it is possible that some travel programs are booking NDC fares without realizing it.

In addition, some travel programs have experienced challenges with NDC. A larger number say they have experienced challenges with the roll-out (24%) than say the transition has gone smoothly (10%).

North American Travel Programs Are Less Likely to Have Started to Implement NDC

Thinking about your travel program's implementation of NDC, which statement best represents your experience?
travel buyers only by region



North American travel programs are less likely to have started to roll out NDC. Half of North America-based travel buyers (55%) say their program has not started to implement NDC.

Q. Thinking about your travel program's implementation of NDC, which statement best represents your experience?

Note: Question only displayed to travel buyers/procurement professionals

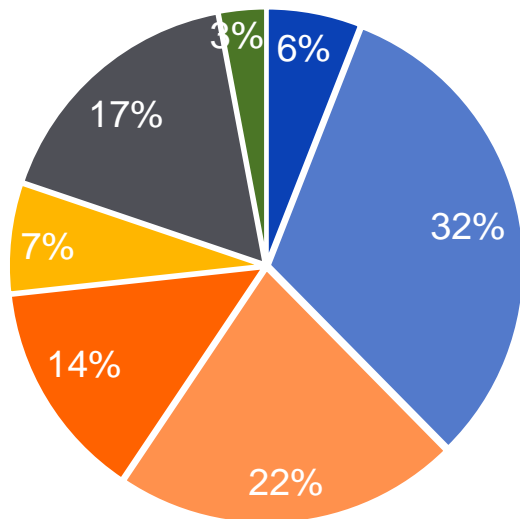
***indicates small sample size for buyers in Asia Pacific and Latin America (n<30)**

The **Travel Intermediary's** Perspective

Some Intermediaries Have Faced Challenges With NDC Implementation

Thinking about your company's ability to distribute NDC content to your corporate clients, which statement best represents your experience?

intermediaries only



- It has gone smoothly - we have made NDC content available to clients without experiencing any challenges
- It has mostly gone smoothly - we have made NDC content available to clients and the transition has largely gone smoothly – but we have experienced a few challenges
- We have experienced some challenges when it comes to NDC content distribution
- We have experienced many challenges when it comes to NDC content distribution
- We have largely not made NDC content available to corporate clients
- It is too early to say
- Not sure

Q. Thinking about your company's ability to distribute NDC content to your corporate clients, which statement best represents your experience?

Note: Question only displayed to respondents who work at a TMC, GDS, or OB (n=88)

Intermediaries continue to solve technical hurdles as they make NDC content available to corporate clients. Today, intermediaries feel better about their progress than they did six months ago.

Almost two in five (38%) say their company has started to make NDC content available and the process has gone smoothly. This is up from one-quarter (28%) in the October Poll.

By the same token, one-third (36%) say their company has started to make NDC content available and experienced some or many challenges. This is down from almost half (47%) in the October poll.

Less Than Half of Travel Buyers Say Airlines Are Moving Too Fast to Roll Out NDC

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

buyers only



42%

Airlines are moving too fast: Some airlines are trying to roll out NDC bookings too quickly and have not given third-party intermediaries--such as GDSs, TMCs, OBTs, and back-office technology providers--enough time to develop the technology and processes needed to efficiently handle and service these bookings



37%

Intermediaries should be ready: Third-party intermediaries have had enough time to work on NDC and should be ready to efficiently handle and service NDC bookings

21%

**Don't know/
Not sure/
Other**

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

Note: Question only displayed to travel buyers/procurement professionals (n=324)

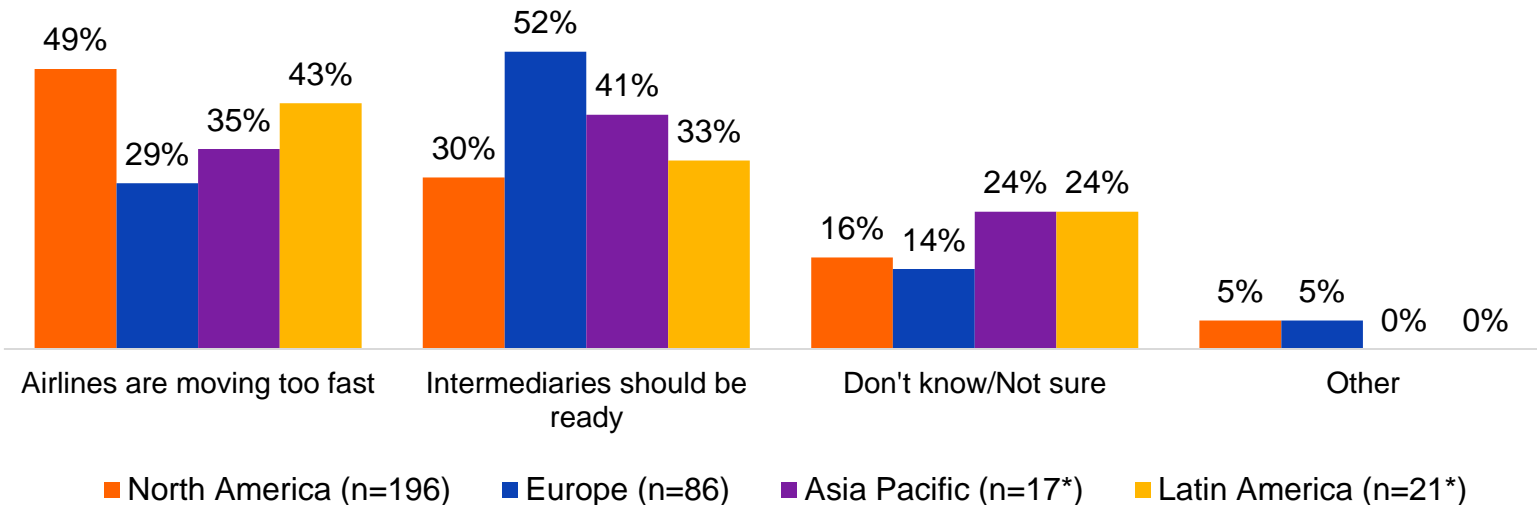
The roll-out of NDC has been driven by airlines. Two in five buyers (42%) think airlines are moving too fast to roll out NDC and have not left intermediaries enough time to prepare. This sentiment is largely unchanged from six months ago (45%).

More than one-third of buyers (37%) say intermediaries have had enough time and should be ready for NDC. This is virtually identical to the share of buyers (36%) who said so in October's poll.

The Travel Buyer's Perspective

There Is a Major Gulf Between Buyers in North America and Europe When It Comes to the Pace of NDC Roll-Out

Thinking about your travel program's implementation of NDC, which statement best represents your experience?
travel buyers only by region



Q. Thinking about the overall roll-out of NDC in the industry, which of the following best describes your view?
Note: Question only displayed to travel buyers/procurement professionals (n=324)

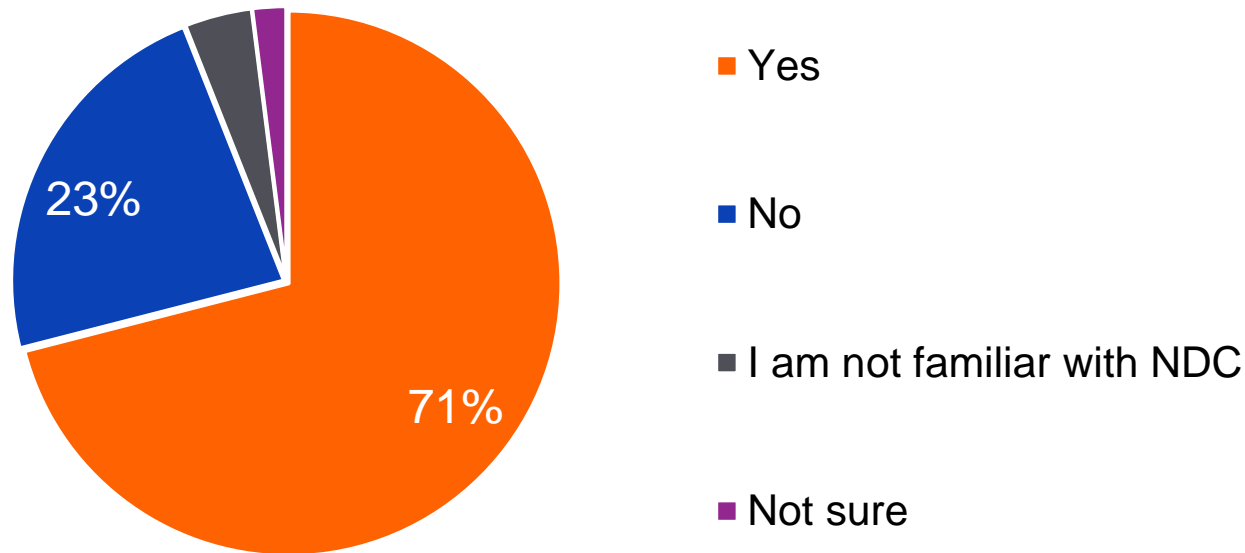
Some airlines and intermediaries are at odds about the pace of NDC. Depending on the region, travel buyers are also at odds.

North American buyers tend to hold airlines accountable. Almost half of North American buyers (49%) say airlines are moving too fast with NDC and are not giving intermediaries enough time to prepare. Fewer than one-third of European buyers (29%) share this sentiment.

European buyers tend to lay blame on intermediaries. More than half of European buyers (52%) say intermediaries have had enough time and should be ready for NDC. Fewer than one-third of North American buyers (30%) share this view.

There Is Still a Need for Information About NDC

In general, do you feel you need more information or education about NDC/airline retailing/ distribution?
buyers only



Buyers still need more information about NDC. Seven in 10 (71%) say they need more information. This is unchanged from October's poll.

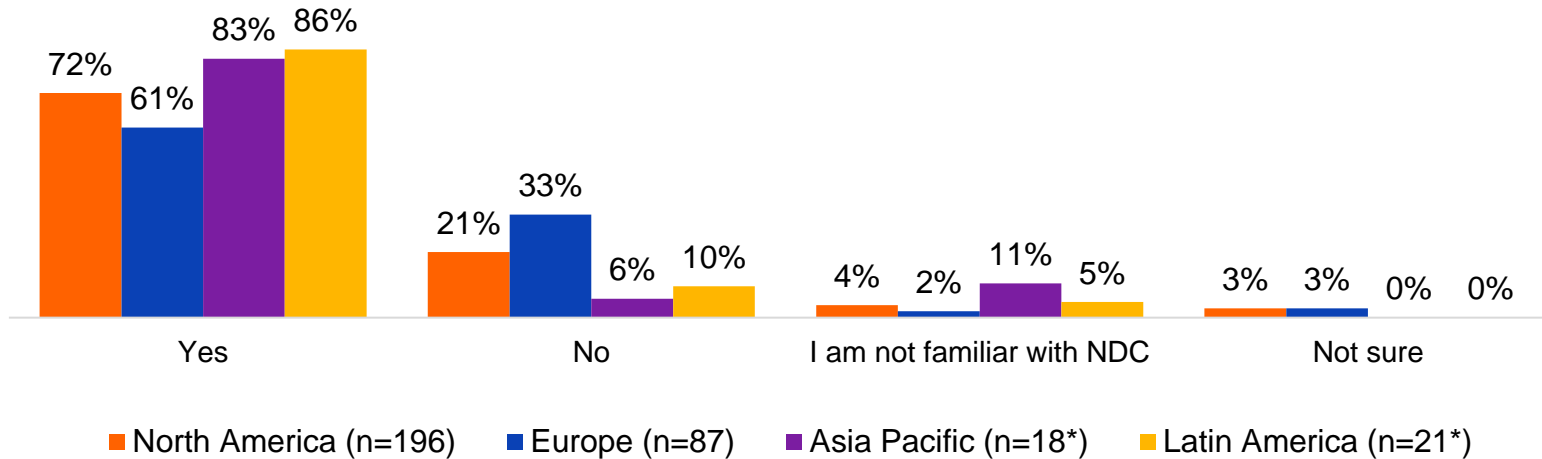
Q. Thinking about your travel program's implementation of NDC, which statement best represents your experience?

Note: Question only displayed to travel buyers/procurement professionals (n=336)

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

Regardless of Region, Buyers Feel They Need More Information and Education About NDC

In general, do you feel you need more information or education about NDC/airline retailing/ distribution?
travel buyers only by region



Q. In general, do you feel you need more information or education about NDC / airline retailing / distribution?

Note: Question only displayed to travel buyers/procurement professionals

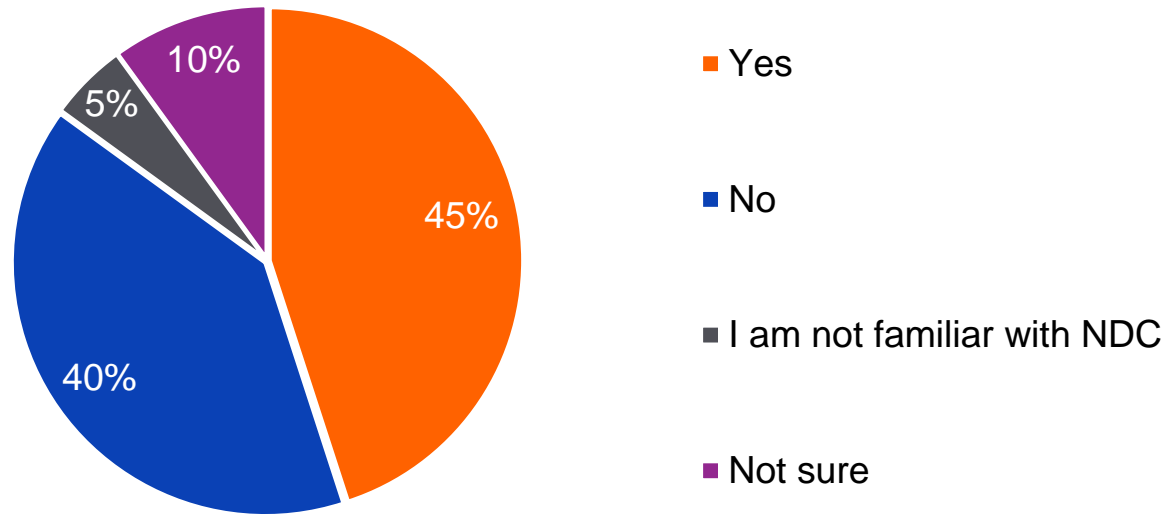
***indicates small sample size for Asia Pacific and Latin America-based travel buyers**

Regardless of region, travel buyers feel they need more information and education about NDC. This is especially true in Asia-Pacific and Latin America.

The **Travel Buyer's** Perspective

Travel Buyers Also Don't Feel Their TMC Has Sufficient Information About NDC

Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?
buyers only



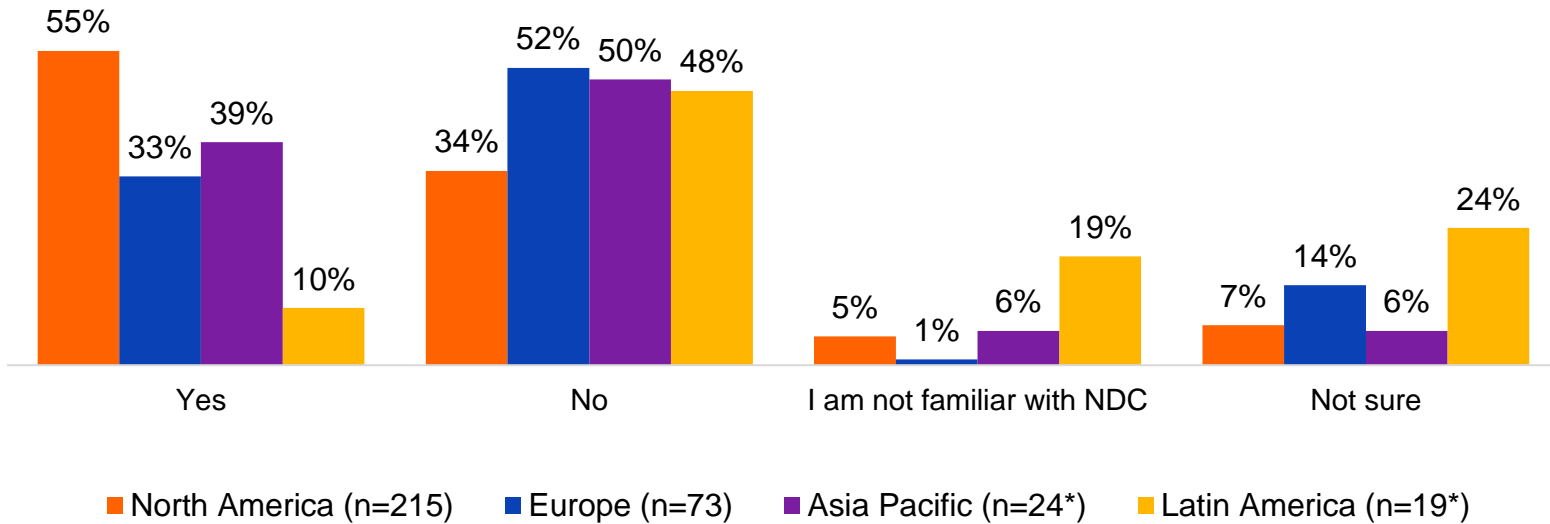
Q. Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?

Note: Question only displayed to travel buyers/procurement professionals (n=323)

Almost half of travel buyers (45%) say their TMC has enough information about NDC and is sharing its plans. This is up considerably from October's poll when fewer than one-third of buyers (32%) said so.

North American Travel Buyers Are Most Likely to Say Their TMC Has Enough Info About NDC

Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?
travel buyers only by region



Q. Do you feel your TMC has sufficient information on NDC and is sharing with you their plans including potential mitigation?

Note: Question only displayed to travel buyers/procurement professionals

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

North America-based travel buyers are most likely to say their TMC has enough information about NDC and is sharing NDC-related plans. More than half of North American buyers (55%) feel this way. This gap between North America and the other regions was also seen in last October's poll.



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Appendix



What Is New Distribution Capability (NDC)?

Travel intermediaries enable “indirect” airline bookings. In other words, instead of booking on an airline’s website, business travelers can book flights through a travel agency (TMC), corporate online booking tool (OBT), or retail online travel agency (OTA). Typically, these intermediaries have relied on technology called EDIFACT to access and book fares. EDIFACT continues to play an important role today.

However, airlines are increasingly making fares available outside of EDIFACT: through direct-connect application programming interfaces (APIs) that feed to intermediaries directly from their systems. While these direct-connect feeds have existed for years, they are currently being developed according to an airline-supported standard format called New Distribution Capability (NDC). The NDC standard is expected to drive much greater adoption and use of direct-connect airline APIs. In some cases, airlines are encouraging intermediaries to use NDC APIs to access fares. Some airlines have removed certain fares from traditional EDIFACT channels. The next nine slides focus on NDC.



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