



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GLOBAL BUSINESS TRAVEL IMPACT AND OUTLOOK DUE TO U.S. GOVERNMENT ACTIONS

July 16, 2025



Poll Results (reflects all respondents across all regions)

1. Which of the following best describes you?

- Travel manager / buyer / procurement / sourcing professional: 50%
- Supplier: 27%
- TMC: 13%
- Other: 10%

2. Thinking about your role at your organization, in which of the following regions do you have responsibilities?

	All	Buyers	Suppliers
Globally	57%	63%	49%
North America	36%	34%	41%
Europe	11%	13%	8%
APAC	9%	9%	8%
Latin America	5%	5%	6%
Middle East	2%	3%	2%
Africa	2%	2%	2%

3. What was your company's total travel spend in 2024 in U.S. dollars (including air, hotel, car rentals, meetings, etc.)? Please use your best estimate.

	All	NORAM	Europe	APAC	LATAM*	US	Canada
Less than \$10 million	23%	24%	21%	17%	25%	24%	32%
\$10 million to less than \$30 million	31%	32%	31%	33%	0%	31%	37%
\$30 million to less than \$75 million	20%	19%	19%	19%	50%	20%	5%
\$75 million or more	23%	22%	25%	27%	19%	22%	21%
Not sure	3%	3%	4%	4%	8%	3%	5%

* Not statistically significant

4. Approximately how many employees at your company travel regularly (at least twice a year) for work? Your best estimate is fine.

	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
500 or fewer	40%	19%	63%	39%	34%	50%	66%	37%	52%
500-5,000	30%	43%	17%	34%	28%	23%	16%	35%	26%
5,000+	23%	34%	12%	21%	33%	19%	16%	23%	14%
Don't know	6%	4%	8%	6%	6%	7%	3%	6%	8%

* Not statistically significant

5. [SUPPLIERS/TMC ONLY] Which of the following best describes the company you work for?

- Accommodations (hotel chain, independent or individual property, home rental, apartment services, other long-term stay): 37%
- Travel management company: 28%
- Ground transportation (car, ride share, taxi, chauffeur/black car or other mobility solutions): 8%
- Travel technology or distribution solutions/GDS: 10%
- Airline or private aviation solutions: 10%
- Meetings management solutions: 1%
- Payment company: 1%
- Rail provider: 0%
- Consultant: 1%
- Legal/Immigration/Visa Services: 2%
- Other: 2%

6. [BUYERS ONLY] Thinking about 2025 as a whole, how do you think your organization's **business travel volume** (i.e., number of trips taken) will be impacted as a result of U.S. government announcements/actions.? Estimates are fine.

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Our business trip volume will decrease	34%	34%	31%	37%	30%	32%	58%
Average expected decrease	19%	19%	19%	12%	13%	17%	35%
Our business trip volume will increase	7%	8%	5%	7%	0%	8%	0%
Average expected increase	14%	15%	15%	12%	0%	15%	0%
Our business trip volume won't change / won't be impacted	46%	47%	43%	44%	60%	49%	21%
Don't know/Not applicable	14%	11%	21%	12%	10%	11%	21%

* Not statistically significant

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

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Business travel spending will decrease	31%	32%	28%	33%	30%	30%	58%
Average expected decrease	17%	17%	17%	14%	15%	17%	18%
Business spending will increase	10%	10%	7%	12%	0%	11%	0%
Average expected increase	14%	14%	13%	10%	0%	14%	0%
Business travel spending won't change / won't be impacted	45%	45%	43%	45%	60%	46%	32%
Don't know/Not applicable	15%	13%	22%	10%	10%	13%	11%

* Not statistically significant

8. [SUPPLIERS/TMC ONLY] Thinking about 2025 as a whole, how do you think has your organization's **business travel revenue** will be impacted as a result of U.S. government announcements/actions? Estimates are fine.

	All	NORAM	Europe	APAC	LATAM*	US	Canada
Business travel revenue will decrease	48%	50%	49%	40%	31%	49%	56%
Average expected decrease	17%	17%	12%	20%	22%	17%	17%
Business travel revenue will increase	7%	7%	12%	0%	8%	7%	7%
Average expected increase	14%	12%	17%	0%	20%	12%	12%
Business travel revenue won't change / won't be impacted	22%	22%	18%	24%	38%	24%	14%
Don't know/Not applicable	23%	21%	22%	36%	23%	20%	23%

* Not statistically significant

9. As a result of recent U.S. government actions, how do you expect business travel volumes will change at your company for the rest of 2025 compared to 2024? – Domestic/Intra-regional business travel

Domestic/Intra-Regional Business Travel	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Decline	23%	15%	33%	26%	16%	25%	18%	25%	34%
Average expected decrease	20%	23%	18%	22%	11%	20%	13%	21%	23%
Remain about the same	63%	71%	53%	61%	70%	59%	59%	63%	52%
Increase	14%	14%	14%	13%	14%	16%	23%	12%	14%

As a result of recent U.S. government actions, how do you expect business travel volumes will change at your company for the rest of 2025 compared to 2024? - International business travel

International Business Travel	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Decline	49%	43%	59%	51%	46%	46%	43%	52%	48%
Average expected decrease	19%	18%	17%	21%	17%	17%	17%	19%	29%
Remain about the same	41%	48%	30%	39%	44%	43%	52%	41%	30%
Increase	10%	9%	11%	9%	11%	11%	4%	7%	22%

10. [BUYERS ONLY] Has your organization adjusted or revised your policy for business travel to or from the U.S. since January 2025 as a result of U.S. government announcements / actions?

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	14%	14%	15%	16%	0%	12%	39%
No	68%	72%	63%	58%	88%	74%	44%
Not yet, but we plan to do so	7%	5%	7%	18%	13%	5%	6%
Not yet, but we are considering doing so	8%	7%	11%	5%	0%	7%	6%
Don't know	3%	2%	4%	3%	0%	2%	6%

* Not statistically significant

11. [BUYERS ONLY] Has your organization done the following since January 2025 as a result of U.S. government announcements or actions? – Canceled in-person meetings overall

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	20%	21%	18%	16%	0%	18%	58%
No	65%	65%	64%	59%	100%	68%	32%
Not yet, but we plan to do so	2%	2%	2%	8%	0%	2%	0%
Not yet, but we are considering doing so	7%	7%	9%	11%	0%	6%	11%
Don't know	5%	5%	7%	5%	0%	5%	0%

* Not statistically significant

12. [BUYERS ONLY] Has your organization done the following since January 2025 as a result of U.S. government announcements or actions? – Canceled sending employees to events in the U.S.

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	18%	18%	21%	14%	0%	15%	53%
No	66%	71%	53%	64%	100%	74%	35%
Not yet, but we plan to do so	2%	0%	5%	3%	0%	0%	0%
Not yet, but we are considering doing so	5%	4%	5%	11%	0%	4%	6%
Don't know	10%	7%	17%	8%	0%	7%	6%

* Not statistically significant

13. Has your organization done the following since January 2025 as a result of U.S. government announcements or actions? – Canceled events in the U.S.

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	17%	17%	19%	14%	14%	14%	53%
No	66%	71%	57%	61%	86%	75%	24%
Not yet, but we plan to do so	1%	1%	1%	0%	0%	1%	0%
Not yet, but we are considering doing so	5%	4%	3%	14%	0%	4%	6%
Don't know	11%	6%	21%	11%	0%	6%	11%

* Not statistically significant

14. Has your organization done the following since January 2025 as a result of U.S. government announcements or actions? – Relocated **meetings** to locations outside the U.S.

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	13%	9%	19%	19%	14%	5%	53%
No	70%	79%	57%	51%	86%	83%	29%
Not yet, but we plan to do so	2%	0%	2%	8%	0%	0%	0%
Not yet, but we are considering doing so	5%	3%	7%	8%	0%	3%	6%
Don't know	11%	9%	15%	14%	0%	8%	12%

* Not statistically significant

16. Has your organization done the following since January 2025 as a result of U.S. government announcements or actions? – Relocated **events** to locations outside the U.S.

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	12%	8%	19%	19%	0%	6%	35%
No	72%	82%	56%	51%	100%	85%	35%
Not yet, but we plan to do so	2%	1%	2%	8%	0%	1%	0%
Not yet, but we are considering doing so	2%	2%	2%	5%	0%	1%	12%
Don't know	13%	8%	22%	16%	0%	7%	18%

* Not statistically significant

17. Has your organization done the following since January 2025 as a result of U.S. government announcements or actions? – Shifted meeting /event to online / virtual format

	All	NORAM	Europe	APAC	LATAM*	US	Canada*
Yes	24%	24%	27%	25%	0%	21%	59%
No	60%	63%	52%	53%	100%	67%	24%
Not yet, but we plan to do so	1%	0%	1%	0%	0%	0%	0%
Not yet, but we are considering doing so	4%	3%	6%	8%	0%	3%	6%
Don't know	11%	9%	14%	14%	0%	9%	12%

* Not statistically significant

18. Thinking about the remainder of 2025, what are your biggest concerns about the potential long-term impact of the U.S. government announcements or actions? Please select up to five.

	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Higher costs related to business travel	55%	58%	50%	61%	44%	44%	45%	62%	59%
Additional processing / administration needs (visas, documentation etc.)	47%	54%	38%	46%	50%	46%	59%	46%	41%
Business travel budget cuts	44%	31%	61%	48%	30%	47%	45%	48%	50%
Increased safety / duty of care needs	46%	58%	32%	47%	47%	46%	27%	47%	47%
Decreased non-U.S. based employee willingness to travel to the U.S. for work	41%	39%	45%	38%	48%	44%	45%	36%	53%
Decreased employee willingness to travel for work	32%	31%	32%	31%	34%	38%	32%	31%	28%
Loss of customers / clients/partners	27%	16%	38%	29%	20%	31%	23%	29%	31%
Loss of market access/market share	21%	18%	25%	20%	20%	30%	18%	20%	19%
Border detentions	31%	38%	24%	31%	33%	33%	9%	30%	35%
Other	3%	4%	2%	5%	1%	1%	0%	5%	3%
Don't know	4%	5%	3%	3%	6%	5%	0%	3%	1%

* Not statistically significant

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

	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Optimistic / very optimistic	28%	29%	27%	28%	25%	27%	32%	30%	23%
Neither optimistic nor pessimistic	45%	48%	42%	44%	48%	49%	45%	43%	49%
Pessimistic/ very pessimistic	26%	21%	28%	26%	26%	22%	19%	27%	27%
Don't know	2%	2%	2%	2%	2%	1%	5%	2%	1%

* Not statistically significant

20. Do you personally know anyone who has had a trip affected (whether business or leisure) by recent U.S. border or travel policy changes?

	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Yes	30%	35%	39%	38%	30%	33%	14%	35%	59%
No	65%	70%	61%	62%	70%	67%	86%	65%	41%

* Not statistically significant

21. In light of current trade uncertainty, new markets and partners may need to be found. Has your organization initiated business travel specifically to meet with alternative or new trade partners or vendors outside the U.S. as a direct response to concerns about U.S. government actions?

	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Yes	15%	12%	19%	14%	16%	13%	23%	11%	31%
No	38%	45%	30%	40%	36%	33%	32%	44%	19%
Not yet, but we plan to do so	7%	4%	9%	6%	5%	11%	14%	6%	6%
Not yet, but we are considering doing so	10%	8%	13%	11%	8%	16%	0%	11%	10%
Don't know	30%	32%	30%	29%	35%	28%	32%	28%	33%

* Not statistically significant

22. You mentioned your organization is traveling--or planning to travel-- to meet with potential new trade partners or vendors outside of the U.S. In which countries or regions is it doing so?

	All	Buyer	Supplier	NORAM	Europe	APAC*	LATAM*	US	Canada*
Canada	44%	37%	45%	56%	35%	21%	25%	45%	83%
Mexico	30%	36%	24%	39%	16%	16%	50%	39%	38%
Europe	71%	71%	66%	73%	70%	68%	50%	72%	75%
APAC	54%	75%	38%	51%	65%	68%	13%	55%	42%

Middle East	27%	32%	19%	24%	35%	32%	0%	25%	21%
LATAM	35%	29%	35%	34%	33%	32%	75%	33%	38%
Other	4%	5%	1%	5%	3%	0%	0%	5%	4%

* Not statistically significant

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

	All	Buyer	Supplier	NORAM	Europe	APAC	LATAM*	US	Canada
Yes	20%	18%	19%	18%	22%	22%	10%	15%	39%
No	48%	50%	47%	50%	45%	43%	62%	52%	36%
Not sure	32%	32%	34%	32%	32%	35%	29%	33%	24%

* Not statistically significant