



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA BUSINESS TRAVEL OUTLOOK POLL RESULTS

October 30, 2025



Poll Results (reflects all respondents across all regions)

Profile Questions

1. Which of the following best describes you?

- Travel manager / buyer / procurement / sourcing professional: 50%
- Supplier: 27%
- TMC: 15%
- Other: 9%

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

	All	Buyers	Suppliers
Globally	54%	65%	43%
North America	31%	24%	38%
Europe	16%	16%	14%
APAC	9%	8%	10%
Latin America	8%	7%	8%
Middle East and Africa	4%	4%	4%

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.

- Less than \$20 million: 45%
- \$20 million to less than \$75 million: 28%
- \$75 million or more: 24%
- Not sure: 2%

4. [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): 32%
- Travel management company: 30%
- Travel technology or distribution solutions/GDS: 11%
- Ground transportation (car, ride share, taxi, chauffeur/black car or other mobility solutions): 8%
- Airline or private aviation solutions: 8%
- Legal/Immigration/Visa Services: 2%
- Payment company: 2%
- Meetings management solutions: 1%
- Consultant: 1%
- Other: 3%

5. [BUYERS ONLY] Which of the following industries best describes your organization?

- Accommodation and Food Services: 2%
- Administrative and Support Service Activities: 4%
- Arts, Entertainment, and Recreation: 2%
- Construction: 3%
- Education: 5%
- Finance and Insurance: 13%
- Health Care, Pharmaceuticals and Social Assistance: 5%
- Information and Communication: 4%
- Manufacturing: 27%
- Media, Information, and Communications: 2%
- Mining, Oil and Gas Extraction and Utilities: 2%
- Non-profit, Association and Foundation: 5%
- Professional, Scientific and Technical: 17%
- Real Estate: 2%
- Retail Trade: 4%
- Transportation and Warehousing: 2%
- Utilities: 2%

U.S. Government Action Impact Questions

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

	All	Buyers	Suppliers
Optimistic/Very optimistic	43%	40%	47%
Neither optimistic nor pessimistic	38%	44%	31%
Pessimistic/Very pessimistic	18%	15%	21%
Don't know	1%	1%	1%

7. [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?

	Buyers %
Our business trip volume will decrease	35%
Average expected decrease	19%
Our business trip volume will increase	9%
Average expected increase	11%
Our business trip volume won't change / won't be impacted	42%
Don't know/Not applicable	14%

8. [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?

	Buyers %
Business travel spending will decrease	30%
Average expected decrease	19%

Business spending will increase	7%
Average expected increase	12%
Business travel spending won't change / won't be impacted	42%
Don't know/Not applicable	21%

9. [SUPPLIERS 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.

	Suppliers %
Business travel revenue will decrease	37%
Average expected decrease	16%
Business travel revenue will increase	10%
Average expected increase	12%
Business travel revenue won't change / won't be impacted	24%
Don't know/Not applicable	29%

10. [BUYERS ONLY] When thinking about U.S. government policies, what do you think will be the impact on business travel in your organization related to **visas for travel to the U.S.** (i.e., cost and/or administration required)?

- High impact: 14%
- Some impact: 45%
- Little/no impact: 34%
- Don't know/not sure: 4%

11. 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	Buyers	Suppliers
Yes	28%	23%	32%
No	38%	39%	39%
Not sure	34%	38%	29%

Traveler Behavior and Sentiment Questions

12. [BUYERS ONLY] How have the following **traveler behaviors** changed in your organization in 2025 versus last year?

	Somewhat More/Much More	About the same	Somewhat less/Much less	Not at all
More in-person meetings	38%	43%	19%	1%
More "linked" or multi-meeting/multi-destination trips	39%	51%	6%	4%
Longer duration of business trips	33%	53%	11%	3%
Use of premium economy on planes	27%	48%	13%	12%
Employee willingness to travel	25%	63%	9%	3%
Prevalence of one-day trips	15%	49%	32%	4%

Use of business/first class on planes	11%	51%	26%	12%
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13. [BUYERS ONLY] Does your company's travel policy permit the use of **short-term rental accommodations** (e.g., Airbnb, Vrbo) for business travel? Please select the option that best describes your company's current stance.

	Buyers %
Yes, always permitted	8%
Yes, permitted but in specific circumstances or as an exception	19%
Yes, but employees must inform or obtain approval from their manager	13%
No, not permitted	53%
We used to, but we don't anymore	1%
Not currently permitted, but under consideration	3%
Don't know/not sure	3%

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

	All	Buyer	Supplier
Frequently/Occasionally	43%	50%	37%
Never/Rarely	36%	33%	38%
Do not know	21%	17%	25%

15. [DISPLAY IF Q8=RARELY, OCCASIONALLY, OR FREQUENTLY] If so, what employee-paying bookings or upgrades are you **most commonly seeing**? Please select all that apply.

	All	Buyer	Supplier
Flight cabin/seating upgrades (from Economy to Premium, etc.)	78%	81%	76%
Airport lounge access	30%	27%	30%
Hotel extra room nights	29%	31%	26%
Hotel room upgrades (nicer/bigger room, amenities)	26%	23%	26%
In-flight WIFI access (if not covered in your travel policy)	14%	11%	16%
Flight extra baggage	12%	7%	18%
Car rental car class	9%	9%	6%
Ground transportation/ridesharing class of car	5%	2%	8%
Train car upgrade	3%	3%	3%
Don't know/Not sure	6%	6%	6%

16. [BUYERS ONLY] Is **internal meeting travel** being used as a means for employee engagement or retention within your organization?

	Buyers %
Yes, explicitly	9%
Yes, indirectly	33%

No	36%
Don't know/Unsure	22%

Blended Travel Questions

17. [BUYERS ONLY] Does your company have a policy or guidelines regarding **blended travel** or “bleisure,” i.e. combining business trips with leisure travel?

	Buyers %
Yes, clearly defined	43%
Yes, informal or case-by-case	28%
No, but considering one	9%
No, and not currently considering one	18%
Don't know/Unsure	2%

18. [BUYERS ONLY] What **benefits** do you see or anticipate from allowing blended travel in your organization? Please select all that apply.

	Buyers %
Improved employee satisfaction and wellbeing	71%
Better work-life balance	68%
Increased willingness to travel for work	52%
Talent attraction and retention	35%
Enhanced productivity during trips	22%
Better managing sustainability with fewer trips / multiple purposes	18%
No significant benefits observed	9%
Other	4%
Don't know/Unsure	3%

19. [BUYERS ONLY] What concerns or **challenges** does your organization face with blended travel? Please select all that apply.

	Buyers %
Duty of care/traveler safety	59%
Expense tracking and reimbursement boundaries	55%
Insurance coverage	46%
Policy enforcement	33%
Lack of visibility into leisure extensions	31%
Taxation, visa or immigration concerns	30%
Other	5%
No major concerns	13%

Accessibility Questions

20. [BUYERS ONLY] What types of **accessible travel options** or services have employees most frequently requested in the past 12 months?

	Buyers %
Air travel seating options	46%

I'm not aware of any requests for accessible travel options from employees	44%
Wheelchair-accessible transportation	23%
Hotels with ADA-compliant rooms	18%
Visual or hearing assistance (e.g., captioning, sign language support)	8%
Neurodiversity-friendly accommodations (e.g., quiet zones, sensory-friendly environments)	8%
Other	2%

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

	All	Buyers	Suppliers
Extensively	26%	18%	35%
Moderately	29%	32%	24%
Minimally	13%	17%	8%
Not at all	7%	9%	4%
Don't know	26%	23%	29%

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

	All	Buyers	Suppliers
Limited employee awareness or demand	39%	50%	26%
Lack of supplier transparency, awareness or information	26%	30%	24%
Lack of accessibility travel options	24%	29%	18%
Complexity in booking accessible services	23%	30%	18%
Budget constraints	15%	13%	18%
Other	6%	7%	3%
None of the above	25%	19%	33%

Agentic AI Questions

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

	All	Buyers	Suppliers
Already are	40%	33%	49%
Next year / 2026	13%	14%	13%
Within 2-5 years	7%	9%	6%
Don't know	26%	29%	21%
I'm not familiar with Agentic AI	13%	15%	11%

24. [DISPLAY IF Q23=ALREADY ARE, NEXT YEAR, WITHIN 2-5 YEARS] In which areas of your business travel operations or services are you **using or planning to use** Agentic AI? Please select all that apply.

	All	Buyers	Suppliers
Intelligent customer service or virtual agents	54%	49%	60%
Traveler personalization and recommendations	51%	48%	55%
Travel policy optimization	42%	47%	38%
Expense reconciliation	42%	51%	32%
Automated itinerary planning	34%	25%	42%
Risk management and disruption handling	29%	28%	30%
Supplier negotiations, contract management or dynamic pricing	24%	28%	22%
Sustainability or ESG reporting	22%	22%	21%
Other	4%	4%	5%
None of the above	7%	7%	5%

25. What are the biggest **challenges** or concerns you face regarding the adoption of Agentic AI?

	All	Buyer	Supplier
Data privacy and security concerns	56%	60%	53%
Integration with existing systems and workflows	44%	51%	37%
Lack of internal understanding or expertise	34%	38%	29%
Cost of implementation and maintenance	29%	34%	24%
Ethical or regulatory considerations	28%	32%	22%
Limited availability of proven use cases in business travel	26%	32%	22%
Uncertainty around ROI or measurable impact	24%	28%	22%
Resistance to change from staff, customers or other stakeholders	24%	26%	23%
Other	6%	6%	3%
None of the above	12%	10%	16%

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