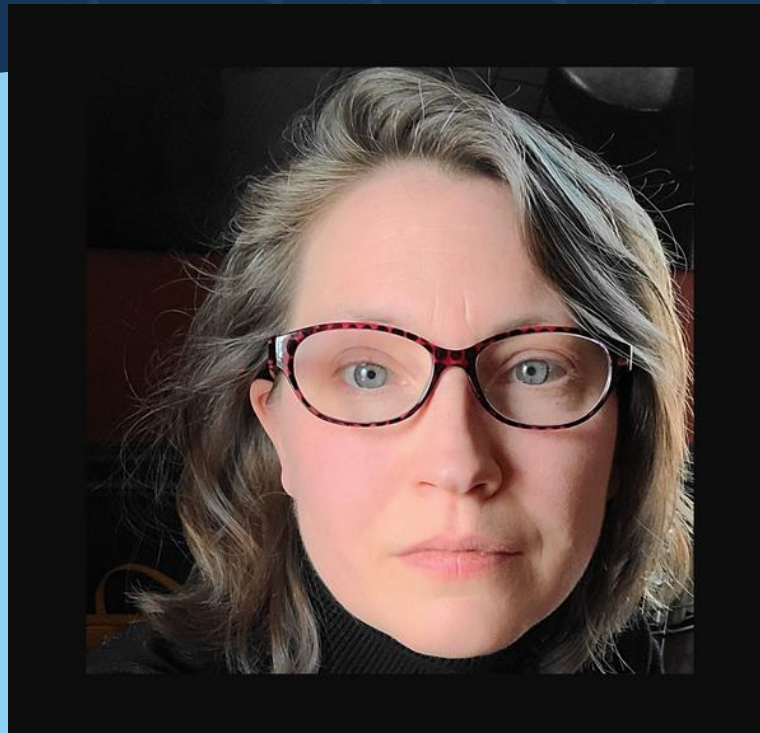




BTN Intelligence: State of the Industry 2025



ELIZABETH WEST

Editorial Director
The BTN Group

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Your source for business travel market data & analysis

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Business Travel News surveyed 314 business travel buyers in January and February 2025 to seek their views on the state of the business travel industry

A further flash survey of 145 companies was conducted in April to assess the impact of new US economic policies

Scan the QR code to access the report in full or head to:

<https://www.businesstravelnews.com/state-of-the-industry/2025>



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Your source for business travel market data & analysis

Part 1: 2025 Business Travel Outlook

Respondents' Projected Organizational Travel Spending, 2025 v. 2024

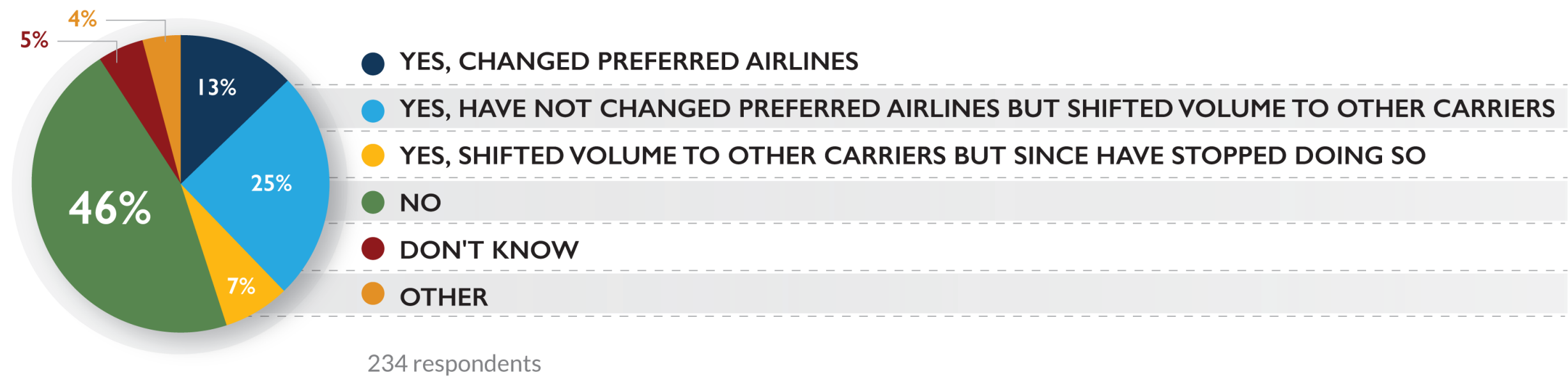


256 respondents, Jan/Feb 2025

145 respondents, April 2025

Part 2: Content Fragmentation Upends Industry Structures

Have Airline Distribution Strategies Affected Supplier Choice or Volume Directed?

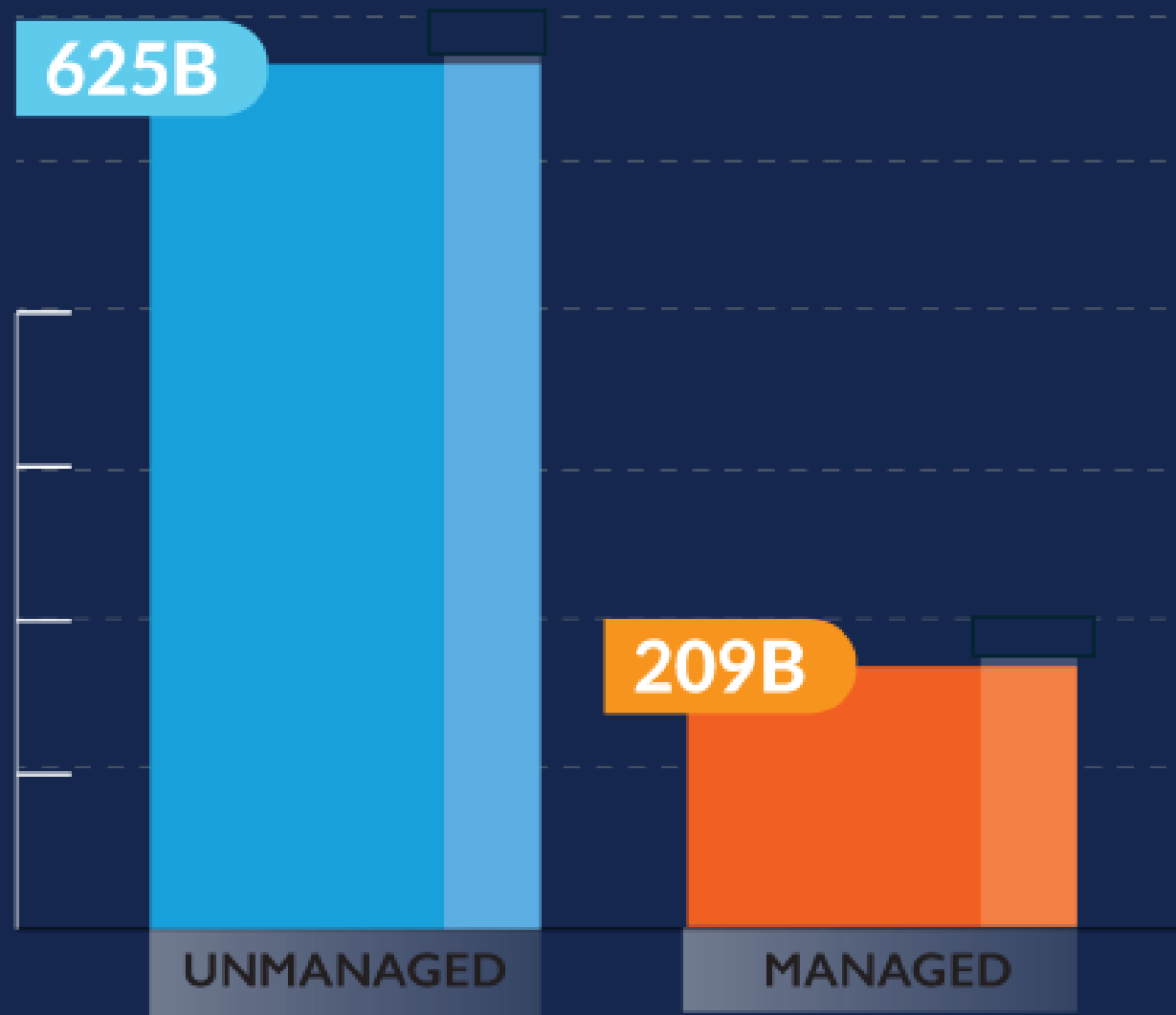


Organizational Change to Travel Policy in 2024?



Part 3: Supplier Lens on Loyalty & Small, Midsize Market

2024 Total SME Opportunity: **\$834 Billion**



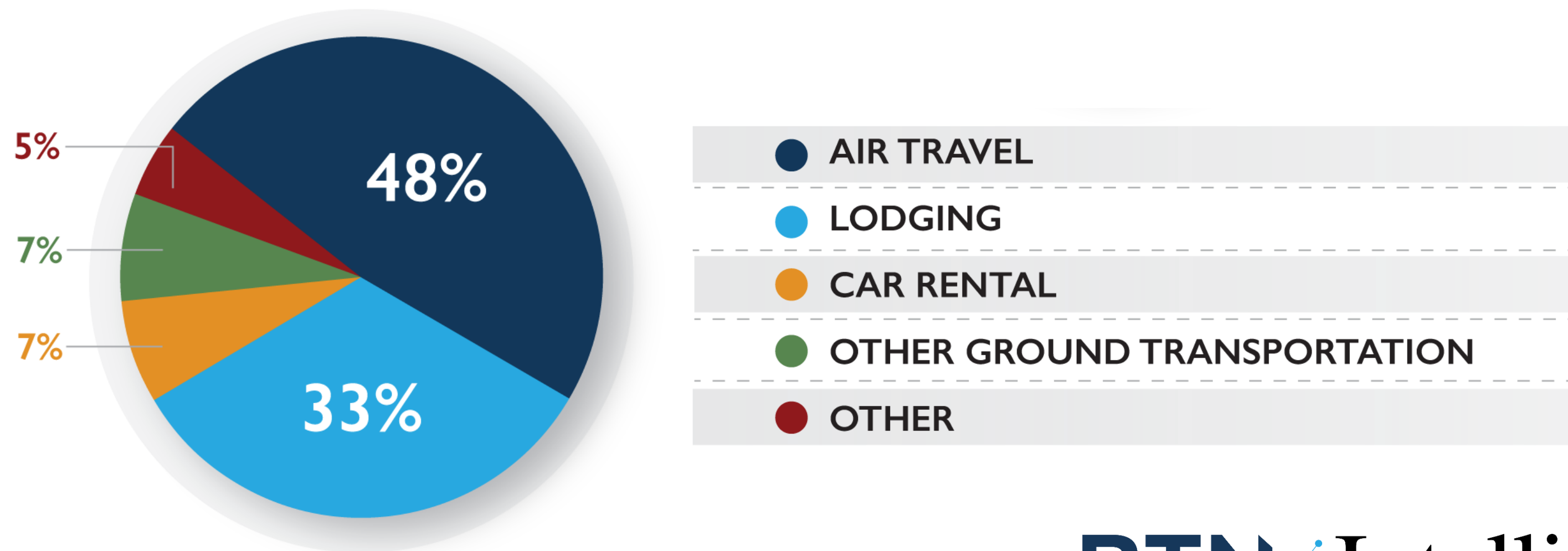
Source: American Express Global Business Travel

2025 BTN State of the Industry Survey:
SME vs. Large Corporate Respondents



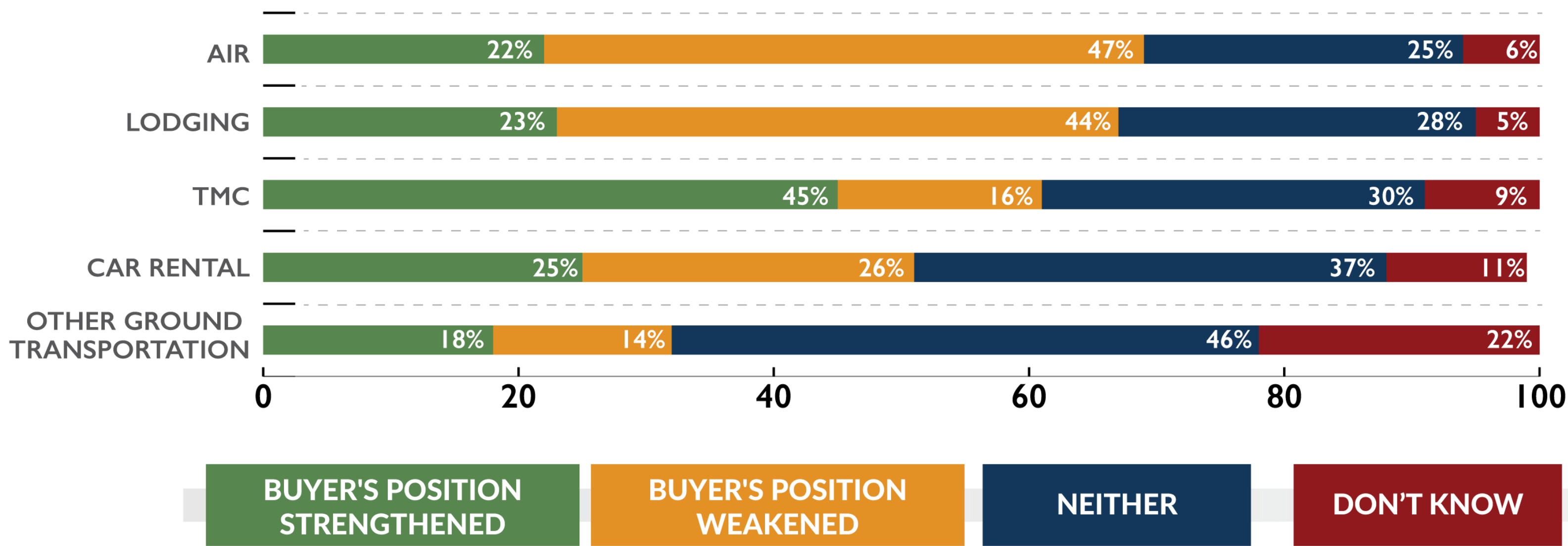
Part 4: Negotiating Gets Tougher for Corporate Contracts

Share of 2024 Organizational Travel Spending by Category



Part 4: Negotiating Gets Tougher for Corporate Contracts

Respondent Change in Negotiating Position From Previous Talks

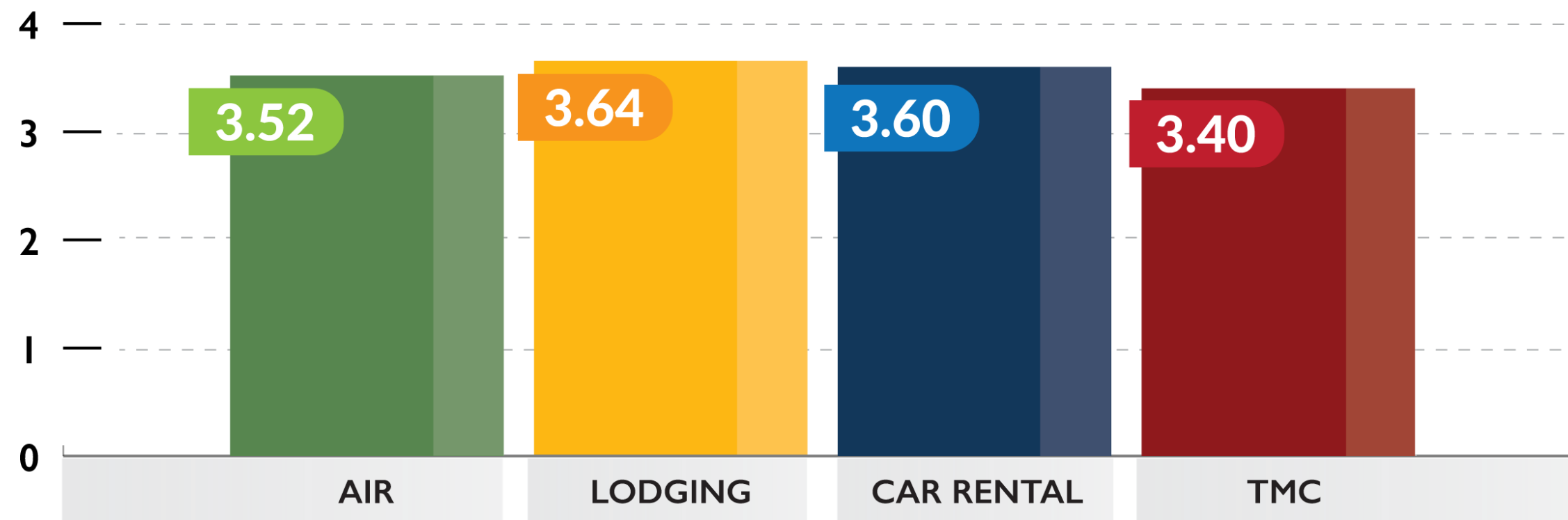


232 respondents

Part 5: TMC Relationships And...Revolution?

How Well Are Travel Suppliers Able to Deliver the Service Levels You Desire for Organization's Travelers?

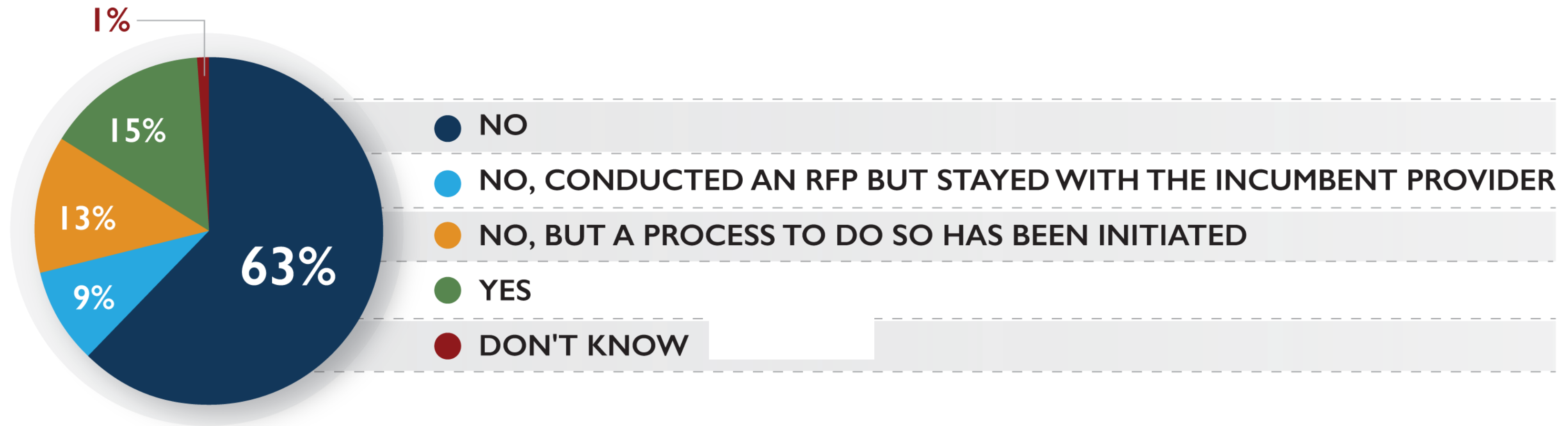
ON AN ASCENDING SCALE OF 1 (NOT WELL AT ALL) TO 5 (VERY WELL)



233 respondents

Part 5: TMC Relationships And...Revolution?

Has Organization Changed TMC in Past Three Years?

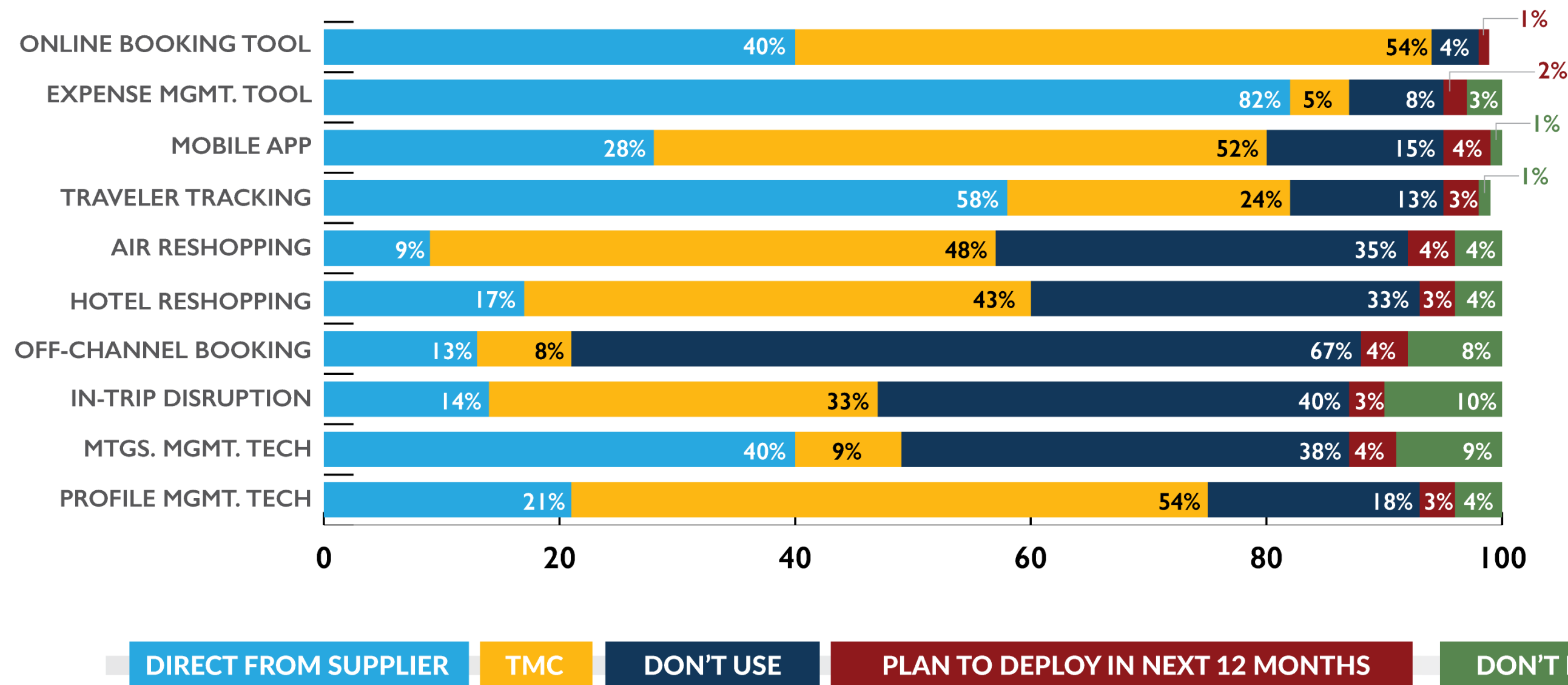


231 respondents

Part 6: New Models & The Next Innovation Wave

Organizational Use of Tech and Source of Acquisition

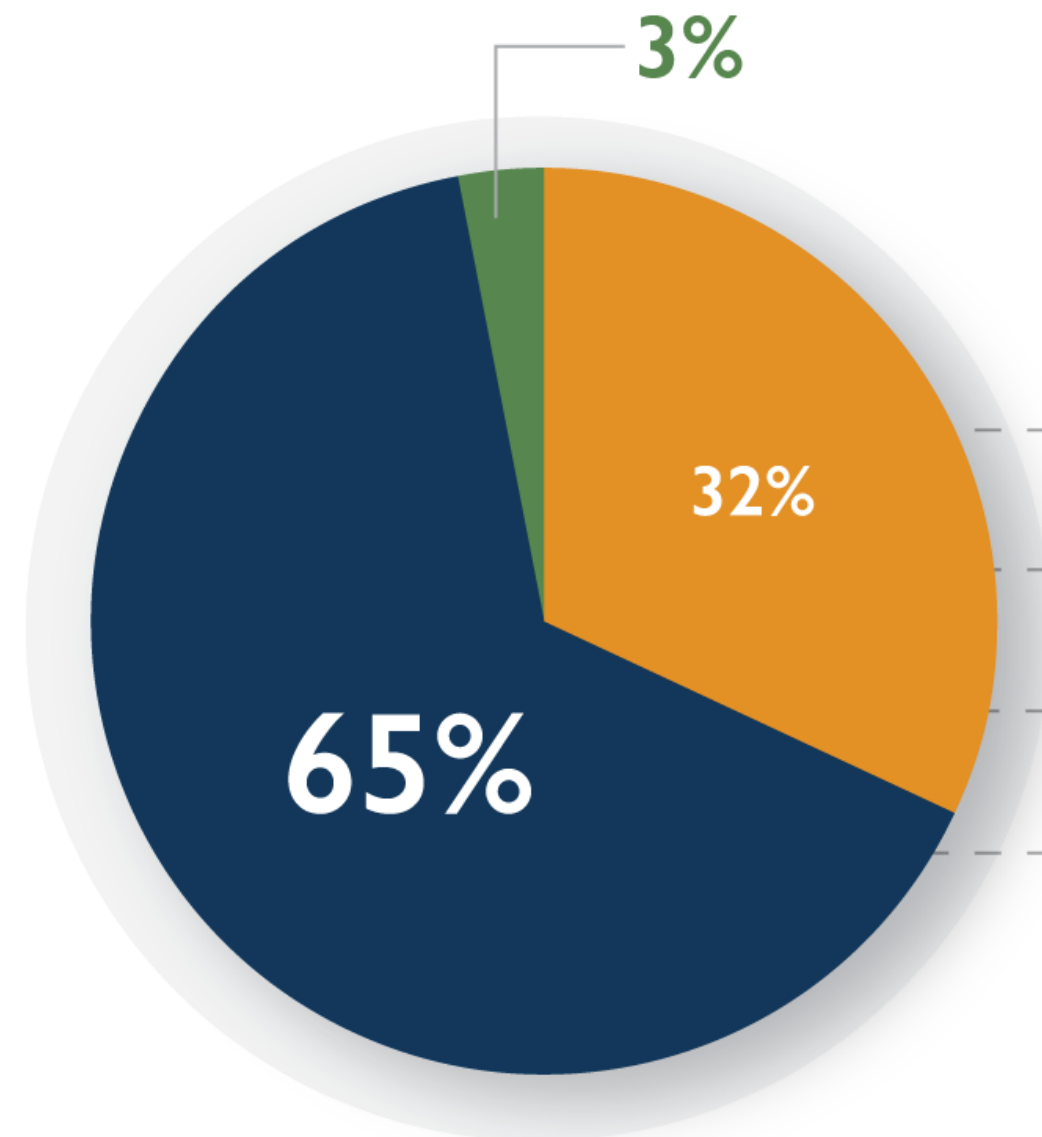
IS PRODUCT SOURCED FROM SUPPLIER OR TMC?



229 respondents

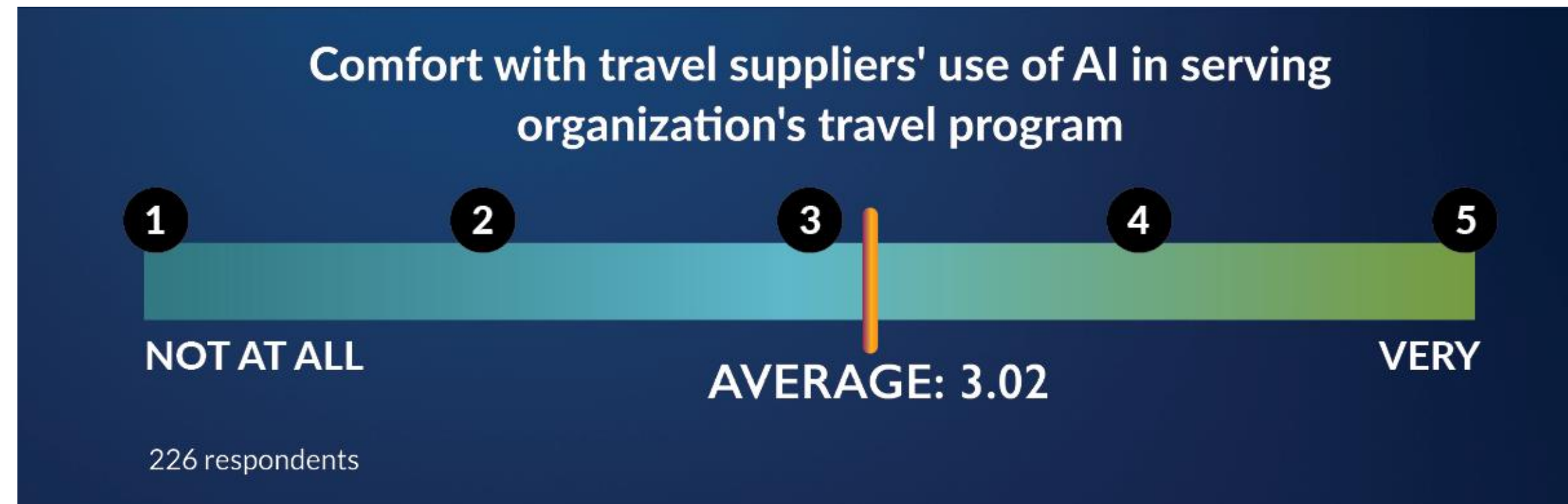
Part 6: New Models & The Next Innovation Wave

Has your organization explored the use of AI in your travel program



231 respondents

- YES
- NO
- DON'T KNOW



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Managing Travel in Small & Midsize Companies 2025

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Tell us what you think

