



GBTA Global Business
Travel Association

Many Voices. One Purpose.

GBTA Government Relations Georgia Chapter

Shane Downey

January 15, 2025



Agenda

- Value of Business Travel
- GBTA positions
- Real ID update
- National Air Space
- Changes with traveling to the US
- Europe travel updates
- Legislative Summit
- Chapter Challenge
- Questions & Answers



Why Business Travel Matters Globally

Worldwide industry

Business travel is a \$1.57 trillion global ecosystem sustaining millions of jobs across aviation, hotels, transportation, and tech.

USD \$1.57 Trillion

***2025 Estimate for Global Business Travel Spending**

***GBTA Business Travel Index Outlook Report – July 2025*



ROI for Companies

Business travel delivers measurable returns - it's an investment, not just an expense.

\$14.60

US Return on Investment*

for every \$1 invested

£13.80

UK Return on Investment**

for every £1 spent

**GBTA report – T&E and the Bottom-Line: Quantifying the Return on Investment of U.S. Business Travel – July 2025*

***GBTA report – T&E and the Bottom-Line: Quantifying the Return on Investment of UK Business Travel – July 2025*

Economic Engine

Business travel enables economies to expand, compete, and innovate through face-to-face connections.

\$484B

US GDP Contribution

In 2022

6M

Jobs Supported

In the US

1.9%

Of Total US Economy

GBTA U.S. Economic Impact Study: Business Travel's Impact on Jobs and the U.S. Economy

GBTA's Three-Prong Approach to Advocacy

01. Educate

- Educate policymakers on the overall value, benefits and impact of our industry

02. Defend

- Highlight the specificities of business/managed travel to ensure laws and regulations don't adversely affect travel programs.

03. Drive

- Shape policies in a way that supports sustainable, safe and efficient travel for work



Business travel's success is everyone's success. It connects people; enables economies, governments, and societies to thrive; and offers fulfilling career opportunities.

Managed business travel reflects the company's priorities for traveler safety, well being, purposeful trips, and expense management. This is done by instituting a travel policy, preferred suppliers with negotiated rates and amenities, a travel management company and/or online booking tool, with travel profiles and a travel manager to oversee and administer the program and policy.

The Political Landscape for Business Travel

The business travel industry has been through major transformations in the past years due to the Covid-19 pandemic and is facing scrutiny from authorities and the public, but 2024 provides great opportunities to shape the policy agenda.











Proactive advocacy vs. reactionary positions on taxes and fees GBTA opposes taxes being levied on travelers as a way to balance a government budget. Any taxes or fees imposed on travel should be invested back into improved infrastructure, innovation, and decarbonization efforts that directly impact travel and improve the passenger experience.



The Latest on REAL ID

TSA Confirm.ID: Travel Smart, Travel Safe

What is TSA Confirm.ID?		<ul style="list-style-type: none">• TSA Confirm.ID is a fee-based option launching February 1, 2026.• Travelers with a lost ID, or without a REAL ID or acceptable form of ID can use TSA Confirm.ID to verify their identity before boarding flights.
Why is TSA Confirm.ID Important?		TSA Confirm.ID is vital for ensuring the safety of our skies and other transportation systems. It strengthens security and protects travelers nationwide.
How Can I Access TSA Confirm.ID?		To access TSA Confirm.ID, visit tsa.gov and follow the provided instructions to verify your identification.
How Much Does TSA Confirm.ID Cost?		TSA Confirm.ID costs \$45 for travelers without a REAL ID or other acceptable form of identification* such as a passport.
How Long Does It Take to Verify My ID?		The identification process takes an average of 10-15 minutes; however, it could take 30 minutes or more.
What is REAL ID?		It's the law. The REAL ID Act establishes minimum security standards for license issuance and production. A REAL ID features a star in the upper right or left corner.
How Do I Get a REAL ID?		<ul style="list-style-type: none">• Visit tsa.gov/real-id and click on your state or territory.• Look for instructions from your local DMV on the necessary steps.
Acceptable Forms of Identification*		<ul style="list-style-type: none">• U.S. Passport or Passport Card• U.S. Department of Defense ID• DHS Trusted Traveler Card• Enhanced Tribal Cards• REAL ID/Enhanced Driver's License

ConfirmID

In effect February 1

Passengers who do not present an acceptable form of ID (including non-REAL ID compliant state-issued identification) at TSA checkpoints may verify their ID using TSA ConfirmID, TSA's modernized alternative identity verification option. TSA ConfirmID is a fee-based service designed to enhance security and streamline identity verification for air travelers who do not have an acceptable form of ID. TSA ConfirmID ensures compliance with federal security standards and strengthens the safety of air travel by preventing unauthorized individuals, including terrorists, illegal aliens, and other bad actors, from accessing domestic aviation systems.

<https://www.tsa.gov/tsaconfirm-id>

\$45 good for 10 days

[Home | Transportation Security Administration](#)

[TSA ConfirmID](#)

[About TSA ConfirmID](#)

[TSA ConfirmID](#)

[FAQs](#)

[REAL ID](#)





Modernizing Air Traffic Control: A Critical Imperative

The National Airspace System stands at a **pivotal moment**.

NextGen aims to **transform air traffic control** from ground-based radar to **satellite-enabled navigation**, from voice communication to **digital data exchange**, and from tactical control to **strategic traffic management**.

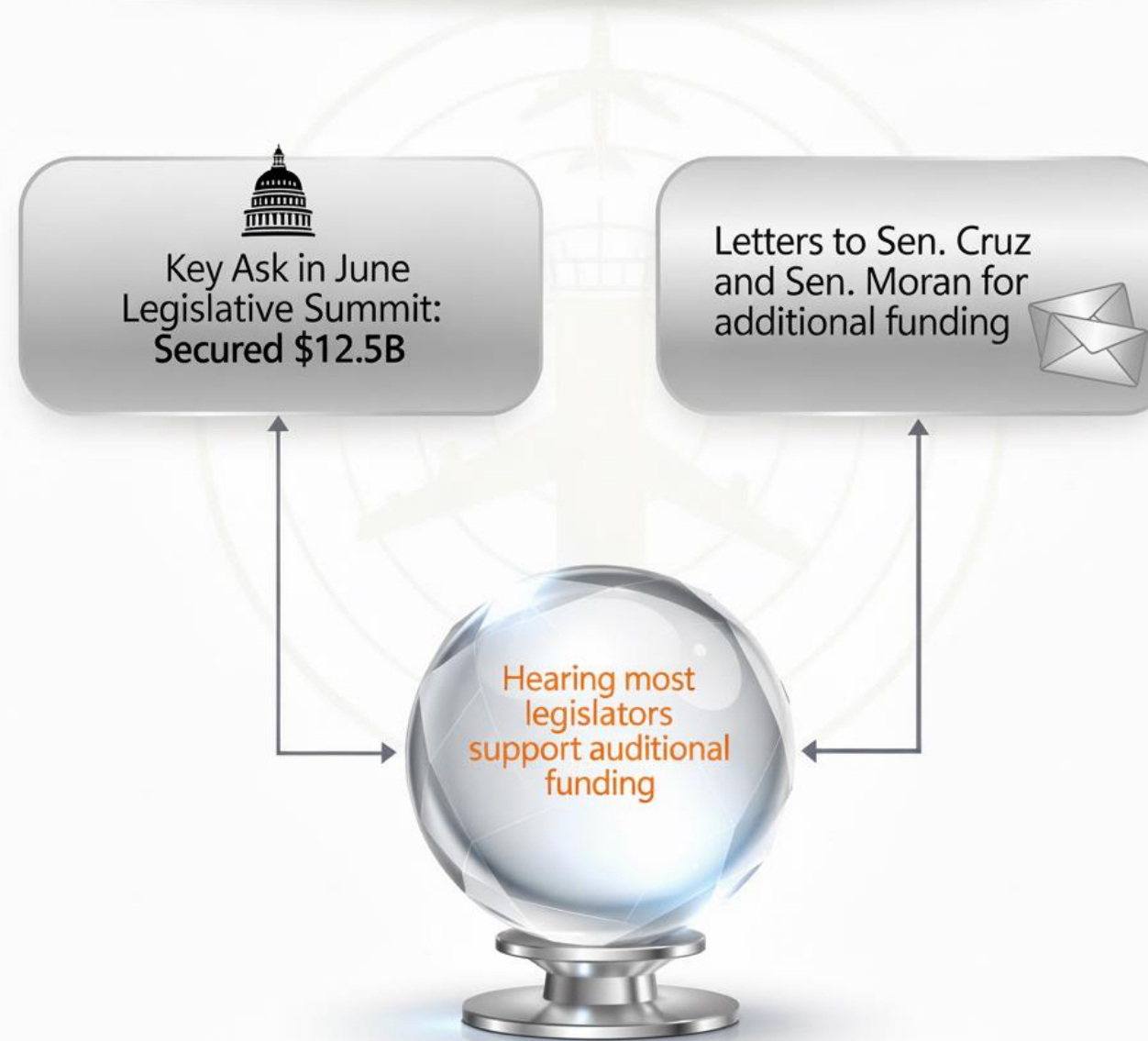
While foundational components are delivering efficiency gains, the journey toward **full modernization** faces significant **challenges** that demand **immediate attention**.

GBTA Activity on ATC Upgrade

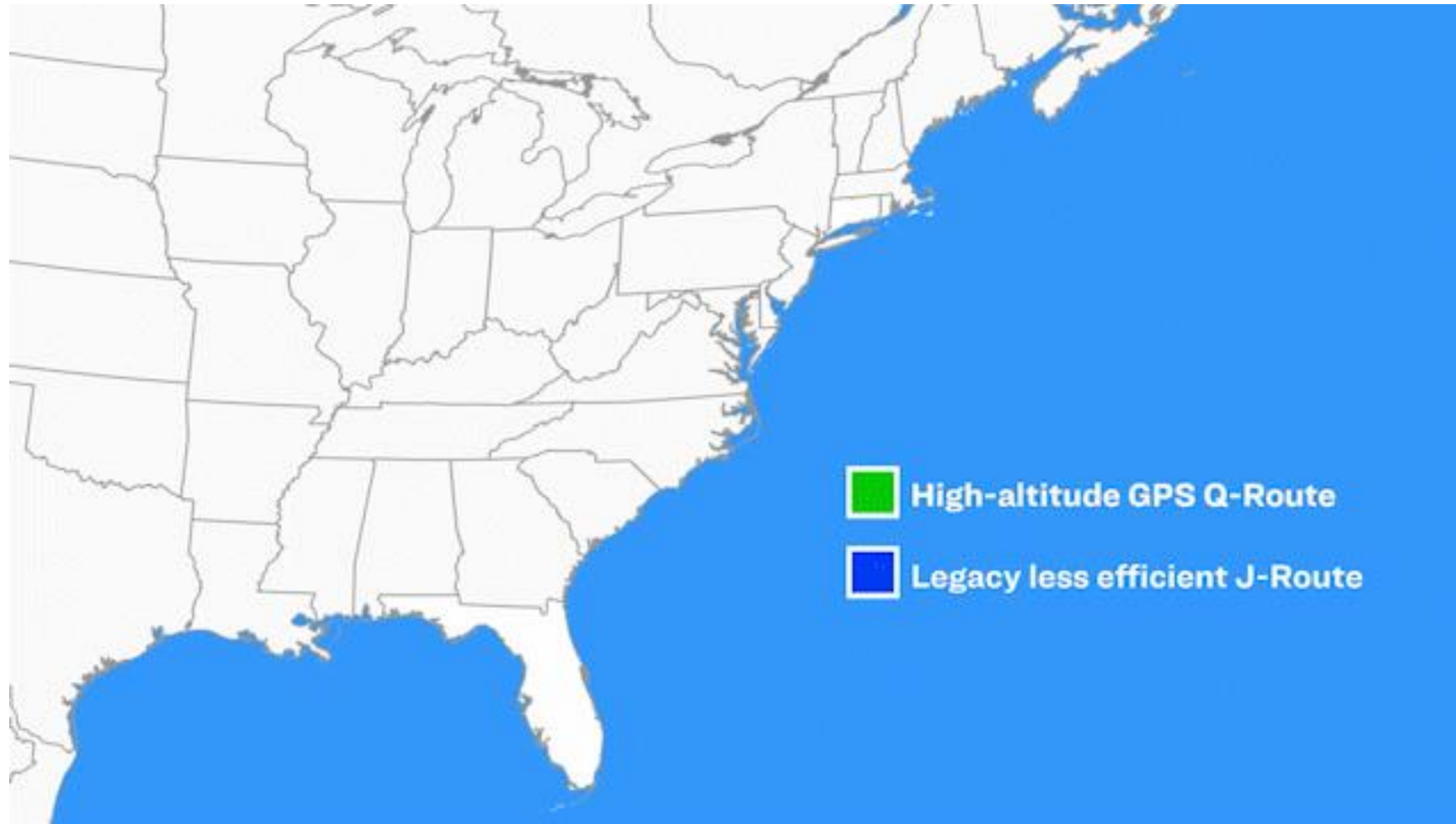
GBTA  1 of 50 groups invited



GBTA Air Traffic Control System Upgrade Initiatives



NEXT GEN Air Traffic Control



The direct routes annually will:

- Save **40,000 miles**
- Save **6,000 minutes** of travel time
- Took **7 years** to develop



CURRENT STATE

The Dual System Challenge

Despite progress with ADS-B, En Route Data Comm, and performance-based navigation, the United States operates a **fragmented dual system**.

Some airspace regions benefit from next-generation capabilities, while others rely on infrastructure that is **several decades old**.

According to DOT OIG audits from 2023-2024, roughly 40 percent of the FAA's core infrastructure systems are **outdated** or nearing **end of life**.

Modernization timelines have slipped, and national adoption remains inconsistent, creating **operational risk** during high-demand periods.

40%

Outdated Systems

Core FAA infrastructure assessed as **outdated** or nearing end of life

Modernizing the Air Traffic System

Background:

- GBTA research on the U.S. economic impact of business travel shows there were a total of **429.9 million business trips** taken within the U.S.

Nearly **35%** of business trips involve **air travel** – second only to personal vehicles – meaning business travelers rely heavily on-air travel.

- Delays, accidents and near misses cause **stress** amongst business travelers



The Modernization Upside

Successful ATC modernization promises transformative benefits across safety, efficiency, and environmental performance. These opportunities represent billions in potential value for the aviation ecosystem.



Environmental & Cost Efficiency

Lower fuel burn, reduced emissions, and decreased operating costs through more direct routing and efficient surface operations that minimize taxi times and delays.



Enhanced Reliability

Improved on-time performance at congested hubs enabled by time-based flow management and more accurate surveillance capabilities.



Greater Throughput

Increased airspace capacity supported by precise navigation and sequencing tools that allow more traffic to flow safely through constrained airspace.



Safety Advancement

Enhanced safety driven by real-time data sharing and predictive traffic management that anticipates conflicts before they develop.



Critical Risks Demanding Attention

Industry leaders continue to highlight significant risks that threaten modernization success and operational stability. These challenges require immediate, coordinated action.

Workforce Crisis

Persistent controller shortages and increasing retirements create capacity constraints that limit system resilience and modernization progress.

Dual System Complexity

Operating legacy and modern systems in parallel introduces operational complexity and increases the risk of errors during transitions.

Infrastructure Obsolescence

Accelerating infrastructure aging increases maintenance risk and the likelihood of unexpected system failures during critical periods.

Cybersecurity Exposure

Expanding digital systems create new vulnerabilities that require sophisticated security protocols and constant vigilance.

Governance Challenges

Slow decision-making structures and complicated accountability frameworks impede the pace of necessary change.

Shutdown Lessons: System Fragility Exposed

The recent government shutdown served as an unintended stress test, revealing structural constraints that directly affect modernization. Despite the professionalism of controllers and FAA staff, critical vulnerabilities emerged.



Staffing as Primary Constraint

Even minor absenteeism prompted FAA flight caps at major airports, revealing minimal buffer capacity. Controller staffing remains the most significant constraint on system performance.



Modernization Work Halts

Training classes, technology testing, and facility upgrades all stopped immediately, creating delays that cascade into future deployment timelines and extend the transition period.



Limited Operational Flexibility

With minimal excess staffing or infrastructure capacity, the system struggles to absorb shocks from weather, technology failures, or funding gaps.



Communication Gaps Intensify

Inconsistent guidance across FAA facilities and operators contributed to reactive scheduling and day-of operational adjustments that amplified disruption.

Core Reality: Modernization cannot succeed if built on top of a system with limited resilience and insufficient staffing. Foundational issues must be addressed in parallel with technology upgrades.

Traveling to the U.S.

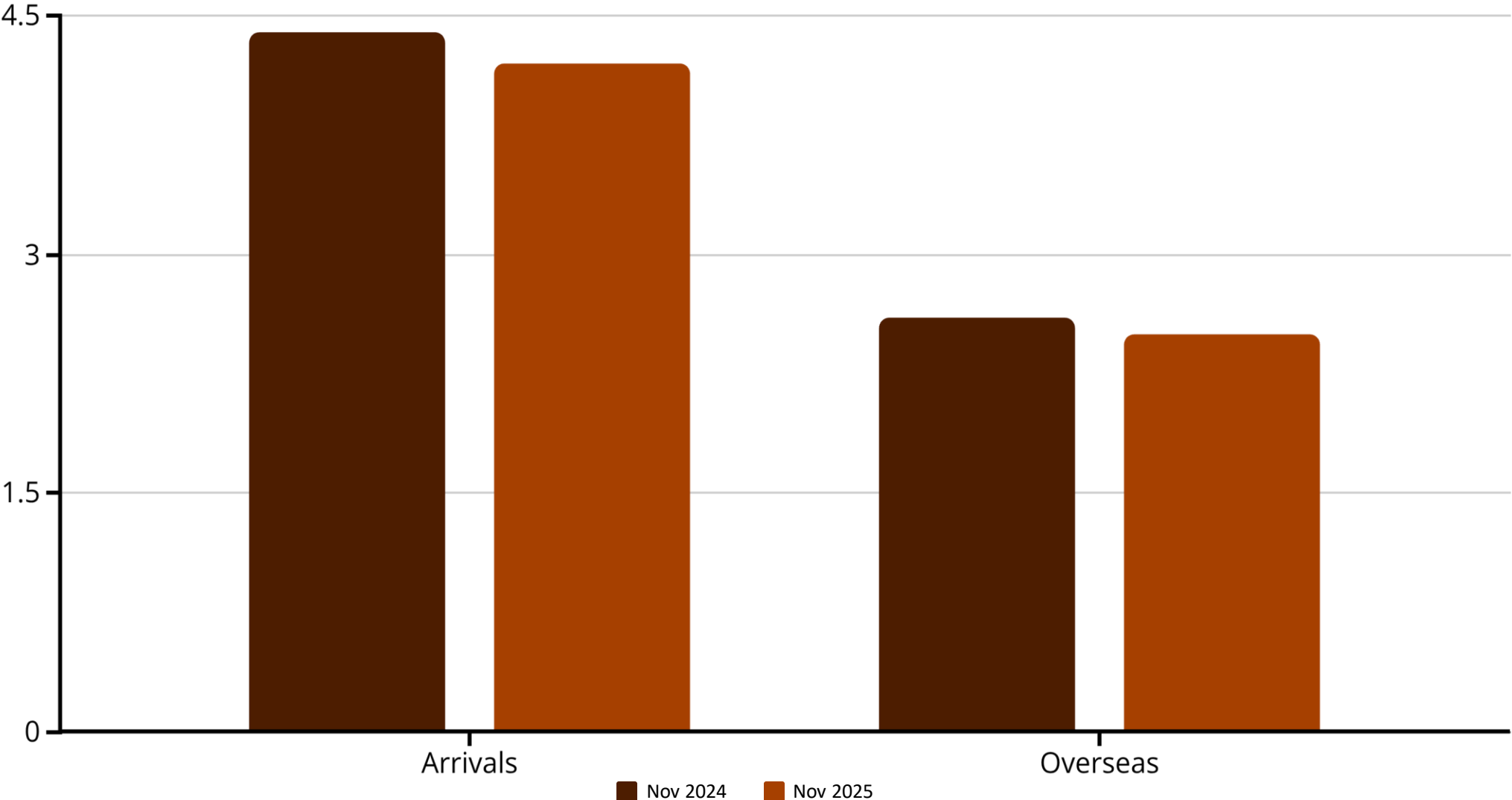
Non-Stop Air Travel to the U.S.

November 2025 Analysis

Non-U.S. citizen air passenger arrivals from foreign countries show continued decline, reflecting ongoing challenges in international travel recovery.



Sharp Decline in International Arrivals



International Air Passenger Travel to and from the United States

4.2M

Total Arrivals

Down 5.2%

2.5M

Overseas Visitors

Down 3.5%

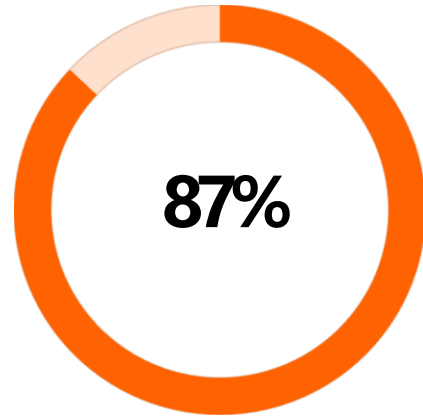
2.6%

YTD Overseas

Down vs 2024

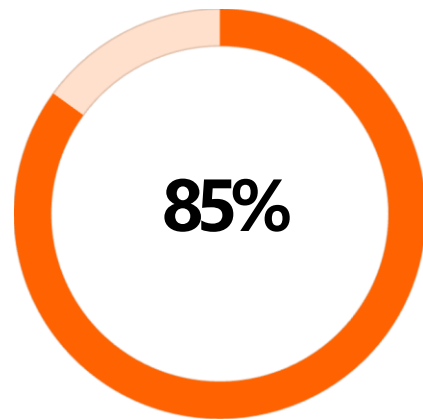
U.S. Dept of Commerce, November 2025

Recovery Status



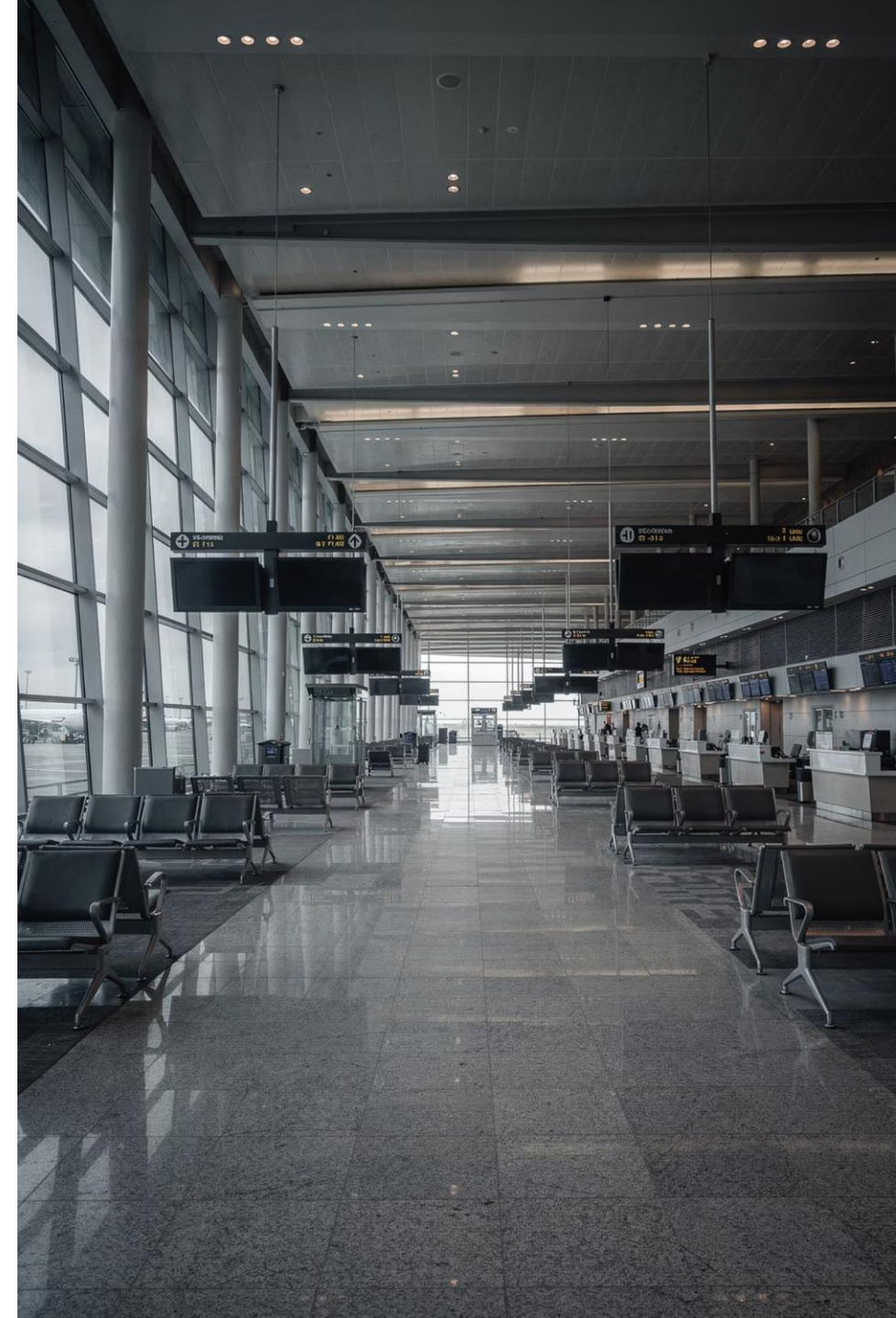
Recovery Rate

Of pre-pandemic November 2019 arrival levels



Overseas Share

Of November 2019 visitor volumes



Proposed ESTA Changes: A Critical Moment for U.S. Travel

On December 10, 2025, the U.S. government unveiled proposed changes to the Electronic System for Travel Authorization that could **reshape** the landscape of **visa-free travel to America**.

These modifications represent the **most significant update** to ESTA requirements in years, with far-reaching implications for business travel, tourism revenue, and international relations across the transatlantic corridor.



Understanding ESTA and Its Role

The Electronic System for Travel Authorization has been the **cornerstone of streamlined travel** to the United States since its introduction.

ESTA allows citizens from **41 Visa Waiver Program countries** to visit the U.S. for tourism or business purposes for **up to 90 days** without obtaining a traditional visa.

This system processes **millions of applications** annually, serving as a **critical gateway** for international commerce, tourism, and cultural exchange.

The program has been instrumental in maintaining **robust travel flows** while balancing **security considerations** with the **economic benefits** of accessible travel.



What's Being Proposed

Enhanced Data Requirements

Travelers may need to provide significantly more personal information, including detailed employment history, social media accounts, and expanded travel records from the past decade.

Extended Processing Times

The approval timeline could shift from the current near-instant authorization to a multi-day review process, requiring advance planning that disrupts spontaneous business trips.

Increased Documentation

Additional supporting documents may be required, including proof of accommodation, return tickets, and detailed itineraries—moving ESTA closer to a traditional visa application.

Higher Application Fees

Processing costs are expected to rise substantially, potentially pricing out leisure travelers and adding burden to corporate travel budgets.

ESTA Under Current Rules vs. Proposed Rule vs. U.S. Visa Applicants Today

Aspect	ESTA Under Current Rules	ESTA Under Proposed Rule	U.S. Visa Applicants Today
Social media info	Optional disclosure	Mandatory 5-yr social media identifiers	Mandatory 5-yr social media identifiers
Phone / Email history	Not required	Yes (5-yr phones, 10-yr emails)	Often part of biographic data
Family detailed history	Not required	Yes	Required in visa applications
Biometrics	Not typically collected in ESTA process	Might increase digital biometrics (selfie)	Collected (fingerprints & photo)
Interview	No interview	No interview	Usually required (unless waived)
Collection platform	Website or ESTA app	Mobile app only	U.S. visa procedures online and in person



Industry Concerns and Impact Assessment

Traveler Confidence at Risk

The proposed changes threaten to erode the confidence that has made U.S. travel attractive. More complex requirements create uncertainty about approval outcomes, potentially deterring travelers from choosing American destinations.

When faced with bureaucratic hurdles, international visitors may opt for competing destinations with simpler entry processes.

Administrative Burden Multiplies

Travel agencies, corporate travel managers, and tour operators face exponentially increased workload.

What was once a simple five-minute online form could transform into an hours-long documentation process requiring professional assistance, fundamentally changing the economics of U.S. travel.

Data Privacy and Security Implications



Privacy Concerns

Collecting extensive personal data, including social media profiles and detailed employment histories, raises significant privacy questions. International travelers may be uncomfortable sharing such comprehensive information with a foreign government.



Data Storage Risks

Expanded data collection creates larger databases vulnerable to breaches. The more information stored, the greater the potential damage from unauthorized access or cyberattacks.



International Standards

These requirements may conflict with data protection regulations in travelers' home countries, particularly the EU's GDPR, creating legal complications and potential diplomatic friction.



ECONOMIC IMPACT

The Stakes for American Tourism

Georgia International spend
\$300 million in 2022

\$253B

Annual Tourism Revenue

International visitors contribute over \$253 billion annually to the U.S. economy. Even a modest decline in arrivals could cost billions in lost revenue.

1.8M

Jobs at Stake

The travel and tourism industry supports 1.8 million American jobs. Reduced visitor numbers directly threaten employment in hospitality, retail, and transportation sectors.

41

Affected Countries

Citizens from all 41 Visa Waiver Program nations would face these new requirements, potentially straining diplomatic relationships and reciprocal travel agreements.



Competitive Disadvantage in Global Travel

Alternative Destinations Gain Ground

Competing destinations in Europe, Canada, and Asia maintain streamlined entry processes that attract travelers seeking hassle-free experiences.

As U.S. entry becomes more complex, these alternatives become increasingly attractive.

The global tourism market is fiercely competitive. When barriers to entry increase, travelers vote with their wallets—and their itineraries.

Nations investing in welcoming policies and simplified processes are positioning themselves to capture market share from the United States.



35% of Non-U.S. Respondents Say Their Company Is or Considering Traveling to Establish New Customer or Vendor Relationships Outside of the U.S.



As trade relationships change, will business travel patterns follow?

19%

of non-U.S. based respondents say their company has initiated business travel to meet with **new potential trade partners or vendors outside of the U.S.**

16%

say their company is planning to do so (7%) or considering it (9%)

31%

say their company is not currently planning to do so

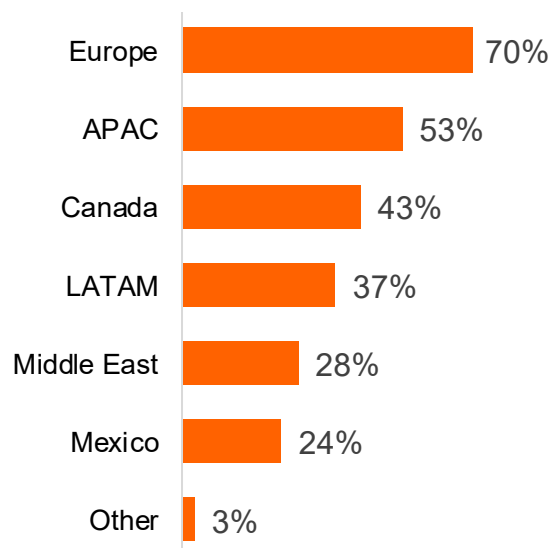
33%

do not know

if yes or planning to

Where?

multiple answers allowed



The Window for Action

December 10, 2025

Proposed ESTA changes officially announced by U.S. Department of Homeland Security. Public comment period opens.

1

2

January 2026

Industry stakeholders mobilize response efforts. Peak period for organizing feedback and coordinating submissions across travel sector.

3

February 9, 2026

Public comment period closes. Final opportunity for industry voice and individual feedback to be heard before policy finalization.

4

Spring 2026

DHS reviews submitted comments and makes final determination on implementation. Changes could take effect within months of approval.

How to Make Your Voice Heard

01

Visit Regulations.gov

Navigate to the official federal rulemaking portal where public comments are collected and reviewed by government agencies.

03

Craft Your Comment

Provide specific, factual feedback on how the changes would impact your business, organization, or travel patterns. Personal stories and concrete data strengthen submissions.

02

Locate the ESTA Proposal

Search for the specific docket number related to the ESTA changes. The proposal will be clearly labeled with submission instructions.

04

Submit Before February 9, 2026

Ensure your comment is submitted before the deadline. All public comments become part of the official record reviewed during the decision-making process.

Important: Comments from industry stakeholders, companies, and individuals are reviewed by DHS officials. Well-reasoned feedback highlighting economic impacts, operational challenges, and unintended consequences can influence final policy decisions.

The Path Forward: Protecting Transatlantic Travel

The proposed ESTA changes represent a **pivotal moment** for the future of U.S. travel and tourism. While security considerations are important, policy must **balance protection with economic vitality and international cooperation**.

The travel industry, corporate travel managers, tourism associations, and individual travelers must **unite to provide comprehensive feedback** during this critical comment period.

Your voice matters—**collective industry response** can shape policies that protect both security interests and the economic engine of tourism.

Act Now

Submit your comments at **Regulations.gov** before **February 9, 2026**.

The decisions made in the coming months will define transatlantic travel for years to come.



Visa Integrity Fee

Or Visa Deterrence Fee

Department of Homeland Security (DHS) has been instructed to charge a new Visa Integrity Fee of at least **\$250 on all nonimmigrant visa categories**, other than ESTA.

The Travel Deterrence Fee may be refundable, but only when a nonimmigrant visa expires or is renewed, and if the visa holder complies with all immigration laws.

No clear timeline for implementation is set.

GBTA is partnering
with other travel
organizations to
address this issue



European Update

What does it mean for business travel?



U.K. Electronic Travel Authorization

New requirements for short term visits

Similar to the U.S. ESTA, this is an electronic authorization you need before boarding a flight to the U.K.

Cost: £10

Uses: Coming to the UK for up to 6 months for tourism, visiting family and friends, business or short-term study

Active as of January 8, 2025



New EU Requirements for Short Stays

- The [Entry/Exit System \(EES\)](#) for registering non-EU nationals travelling for a short stay in 29 European countries rolling implementation started October 2025.
- [European Travel Information and Authorization System \(ETIAS\)](#) is expected to be in place next year.
- Once in effect, travelers subject to the new requirement will need to register online or through the app in advance of travel to clear screening.
- The EU is anticipating efficient processing times with many applicants receiving approvals in hours or days.
- Validity will be three years or expiration of the linked passport; travelers should retain unique ETIAS application number and documentation.
- Border officials will ensure continued eligibility prior to each entry.



In 2026, people traveling to 30 European countries will need an ETIAS travel authorization to enter for up to 90 days.



GBTA Legislative Summit 2026

Washington, D.C. | JUNE 9 – 11, 2026

Government policies on domestic/international travel, the nation's infrastructure and improved sustainable travel **impact you, your travelers, and your customers.** .

The **U.S. Legislative Summit** will give you an insider's view of legislation and teach you how to shape U.S. policies. Experts, members of Congress and the Administration will educate you on the particulars. Attendees will then meet personally with the offices of their federal Representative and Senate offices to advocate for positive change to OUR government.

Why Attend?



Learn about top legislative issues impacting the industry



Become an advocate for the business travel industry



Educate members of Congress on the importance of business travel



Make connections with buyers and suppliers in your state and across the country



Drive positive change

Delivering Results for the Business Travel Industry

Key legislative victories strengthening infrastructure, security, and innovation



Traveler Convenience

TSA PreCheck & Global Entry enacted—faster, smarter security screening for millions



COVID Travel Restrictions Lifted

Ended inbound international travel barriers—reopening America to the world



Sustainable Aviation Fuel

Increased SAF production support—production tax credit in One Big Beautiful Bill

Border Security & Efficiency

- Additional CBP officers funded
- Full Entry Exit system implementation
- Stronger border processing capacity

Infrastructure Investment

- \$12.5B for Air Traffic Control upgrades
- Pursuing additional ATC funding
- Billions for improved transport systems



Real investment. Real progress. Real results for GBTA.

2026 Chapter Challenge

Required Activities to make Partner Status (5 Tasks)	
*	Chapter Invites an elected/government official to speak AND Chapter speaks on GBTA Government Relations policies for 15 minutes
*	30% of Chapter members must send an email to an elected official through the GBTA website and send a proof (to be determined by chapter) to GBTA
*	Chapters must send an endorsed GBTA letter to its area's/Federal elected official
*	Total Chapter PAC donations must equal \$10.00 per each chapter member with at least 30% of members donating
*	Chapter must assign a person to serve as a liaison to GBTA Government Relations
Points	Bonus Points
1	Chapter sends one member to the 2026 Legislative Summit (1 Point only)
1	Total Chapter PAC donations average at least \$15.00 per chapter member with at least 30% of members donating
1	Total Chapter PAC donations average at least \$20.00 per chapter member donating with at least 50% of members donating



*** Total Chapter PAC dollars donated divided by Total Chapter Members

In the case of a tie in points earned, the highest average amount "Per Chapter Member" will be deemed CHAMPION

Chapter Challenge Partner



Georgia Chapter



GBTA Business Travel PAC

Recent successes – but MORE work to do

- Investing in Travel Efficiency: We helped to secure \$12.5 billion from the US Gov't for vital air traffic system upgrades, making travel safer and more efficient for business professionals. This is only the first step toward the \$30 billion needed for a world-class system.
- The extension of the tax credit for Sustainable Aviation Fuel until 2029 promotes greener business travel and demonstrates our commitment to a resilient industry.



You can support GBTA's U.S. Advocacy work by contributing to the Bi-partisan Business Travel PAC (must be US Citizen)

What is a PAC?

Political Action Committee

A PAC is a vehicle through which associations and other types of nonprofits can **support federal candidates** who agree with their positions on **critical issues**.

Through a PAC, an association can **contribute funds** to the campaign committees of federal candidates.

Without a PAC, associations are prohibited from contributing money to a federal candidate.

Make a **PERSONAL** \$\$ contribution to GBTA's Business Travel PAC to support members of Congress's election

Donate to the Business Travel PAC

PAC Disclaimer



Business Travel PAC is a federal political committee that makes contributions to federal candidates and committees. Contributions to Business Travel PAC are voluntary and any member has a right to refuse to contribute without reprisal.



The contribution guidelines are merely suggestions and a member may contribute more or less or not at all without concern of favor or disadvantage by the association. Contributions are not deductible as charitable contributions for federal tax purposes.



Federal law requires Business Travel PAC to request the name, address, occupation and employer for each person whose contributions exceed two hundred dollars (\$200.00) or more in a calendar year.



GBTA Global Business
Travel Association

Many Voices. One Purpose.

Questions?

Shane Downey

GBTA Vice President, Government & Community
Relations

sdowney@gbta.org

www.gbta.org

