

We're All In This TOGETHER



GBTA Canada Town Hall

Wednesday, August 19 @ 2pm EST

Connecting the people that connect the world.™





Nancy Tudorache

Regional Vice President, Canada
GBTA

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Town Hall Agenda

- **GBTA Updates**, Tools, Resources, and Special Announcements
- **GBTA Coronavirus Impact Poll Results:** Chris Ely, Director of Research, GBTA
- **The Canadian Economic Impact from Covid-19:** Jon Gray, Principal, Rockport Analytics
- **Canadian Travel & Tourism Roundtable:** Randi Rahamim, Managing Director, Teneo
- Question Period (time permitting)

Direct Questions in Zoom Chat to: ***GBTA Questions***

For Assistance: tosullivan@gbta.org

GBTA Canada Town Halls are Recorded and available on our website gbta.org/canada

Do you have a Question?

Please submit questions to the dedicated **GBTA Questions** via the chat feature on Zoom.
Questions will be answered only if time permitting.

GBTA Questions

This GBTA Canada Town Hall was made possibly by:

SHANGRI-LA GROUP

Shangri-La Hotels & Resorts

Rohit Kapur

Director of Sales

Shangri-La Hotel, Toronto

Rohit.Kapur@shangri-la.com

SHANGRI-LA GROUP



Shangri-La hotel

TORONTO



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Website: Using the following [LINK](#)



PROGRESS...



Forward or onward movement or momentum

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GBTA Canada Advisory Board



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Canada, Regional Chair
Category Manager, Service
Delivery
Rogers Communications



Linda Lee, GTP
Executive Assistant
Upstream
Cenovus Energy Inc.



Geoffrey Parsons
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Geopar Consulting



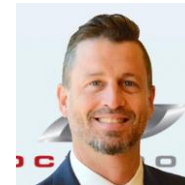
Jennifer Urquhart
Strategic Sales Manager,
Canada
Enterprise Holdings



Sue Spear
Manager, Corporate Travel &
Fleet
Cengage Learning



Connie Smith, GTP, GLP
Manager, Global Travel Services
McCain Foods Ltd.



Stephen Anderson
SVP Corporate Relations &
Marketing *FocusPoint
International*



Alex Ferdinand
Managing Director,
Worldwide Sales
BWH Hotel Group



Shelly Lewchuk, GTP
Past President of the Advisory
Board,
GBTA Canada
Manager, Corporate Travel
*Canadian Natural Resources
Limited*



K. Ian Race, CTC, CTE, GTP
Senior Vice President, Corporate Sales
Direct Travel

Chair, GBTA Canada Advisory Board Transition

2016 - 2020



Sharlene Ketwaroo-Nanoo
Category Manager, Travel
Rogers Communications

2020 - 2022



Sue Spear
Manager, Travel & Fleet
Cengage Learning

GBTA Canada Volunteer Opportunities



GBTA Canada Volunteer Opportunities

GBTA Canada Advisory Board Available Positions

3 Available Direct (Buyer)

3 Available Allied (Supplier)

GBTA Canada 2021 Committees

Transportation
(air, car, ground, rail)

Accommodations

Meetings

Technology

Risk

GBTA Canada 2021 Taskforces

GBTA Canada Conference
Toronto

GBTA Western Canada
Conference
Calgary



Just Announced: May 9-12, 2021

GBTA COLLABORATORY

2020 Webinar Series

GBTA Collaboratory 2020 is a 10-week webinar series designed to provide perspectives, best practices, expert insight, and actionable takeaways to address the issues facing the global business travel industry. Attendees of the series will experience strategic, informative, and solution-focused dialogue between panelists made up of business leaders, GBTA committees and volunteers, sponsors, and industry experts. Join us for this in-depth outlook on the future of business travel.

Cost:

GBTA Members and Chapter Members: Complimentary
Non-Members: \$49 USD per webinar

[Click here](#) for more information

Mark Your Calendars!**Upcoming Weekly Topics**

August 24-28: Travel Sourcing: Buyer & Supplier Relationships

Aug. 31- Sep. 4: Stakeholder Management: Travel Policy

Sep 14-18: Virtual Payment and Touchless Travel Experience

[View schedule](#)

GBTA COLLABORATORY

2020 Webinar Series

August 24-28

**AUG
24**

GBTA Collaboratory Webinar - TBD

Content for this GBTA Collaboratory webinar is in the process of being finalized. More information will be available soon.

**AUG
25
2020**

Are We Witnessing and Possibly Enabling the Dissolution of the Managed Travel Program as We Know It?

11:00 AM - 12:00 PM ET

**AUG
26
2020**

To RFP or not to RFP: That is the 2021 Question

11:00 AM - 12:00 PM ET

**AUG
27
2020**

Buyer/Supplier Partnership: Sharing Contractual Risk in the Age of COVID-19

11:00 AM - 12:00 PM ET

**AUG
28
2020**

Ditch Your “Old School” Benchmarking & Strive for “Best in Class”

11:00 AM - 12:00 PM ET

[Click here](#) for more information

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Wednesday, September 23 @ 2pm EST



[visit: gbta.org/Canada](https://gbta.org/Canada)

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GBTA Covid-19 Polling

Chris Ely

Research Director

GBTA

cely@gbta.org



GLOBAL BUSINESS TRAVEL ASSOCIATION

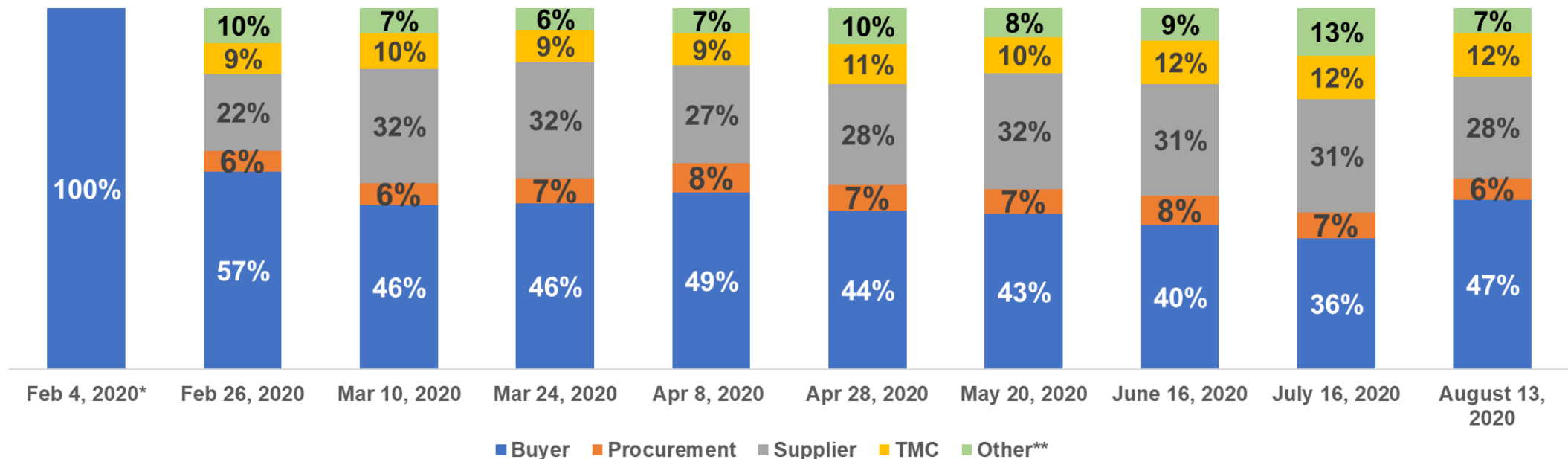


GBTA Poll: Background

- One of the first industry polls on Covid-19 and its impact on the business travel industry – the first poll launched in early February 2020
- GBTA conducts semi-weekly global polls on Covid-19 and its impact on the business travel industry
- A benchmark for the industry, GBTA's coronavirus poll receives responses from over 1,000 GBTA member companies
- Fielded in five languages (English, French, German, Portuguese and Spanish)
- Widely read by media outlets, industry leaders, policymakers, trade associations, and government agencies- including the U.S. Department of Commerce

Consistent responses from GBTA members

GBTA Coronavirus Poll: Respondents



* Only Buyers were polled in the first coronavirus poll

** Other can include Consultants, HR, Meeting Planner, Travel Agents, Travel Technology, etc.

Business Travel Remains Grounded



96%

of companies have canceled or suspended **most** (26%) or **all** (71%) trips to China



93%

of companies have canceled or suspended **most** (25%) or **all** (68%) trips to Latin America



88%

of companies have canceled or suspended **most** (31%) or **all** (57%) trips to Canada



93%

of companies have canceled or suspended **most** (37%) or **all** (56%) international trips



94%

of companies have canceled or suspended **most** (28%) or **all** (66%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



90%

of companies have canceled or suspended **most** (35%) or **all** (55%) trips to European countries



83%

of companies have canceled or suspended **most** (41%) or **all** (41%) trips to the United States



74%

of companies have canceled or suspended **most** (47%) or **all** (27%) domestic travel within their own country

Travel Suppliers Remain Pessimistic

How do suppliers feel about the corporate travel industry's path to recovery?



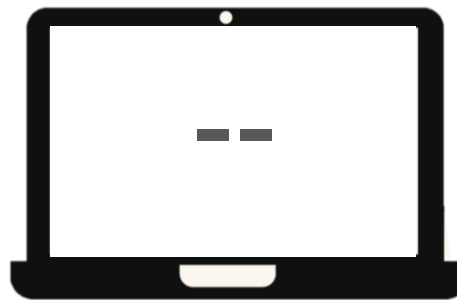
Note: Question only displayed to travel suppliers/TMCs

After Signs of Recovery, Bookings Stall...

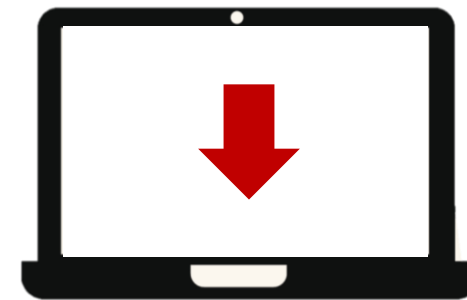
How have bookings from corporate customers changed in the past week?



20% Our bookings have increased



50% Our bookings have remained the same

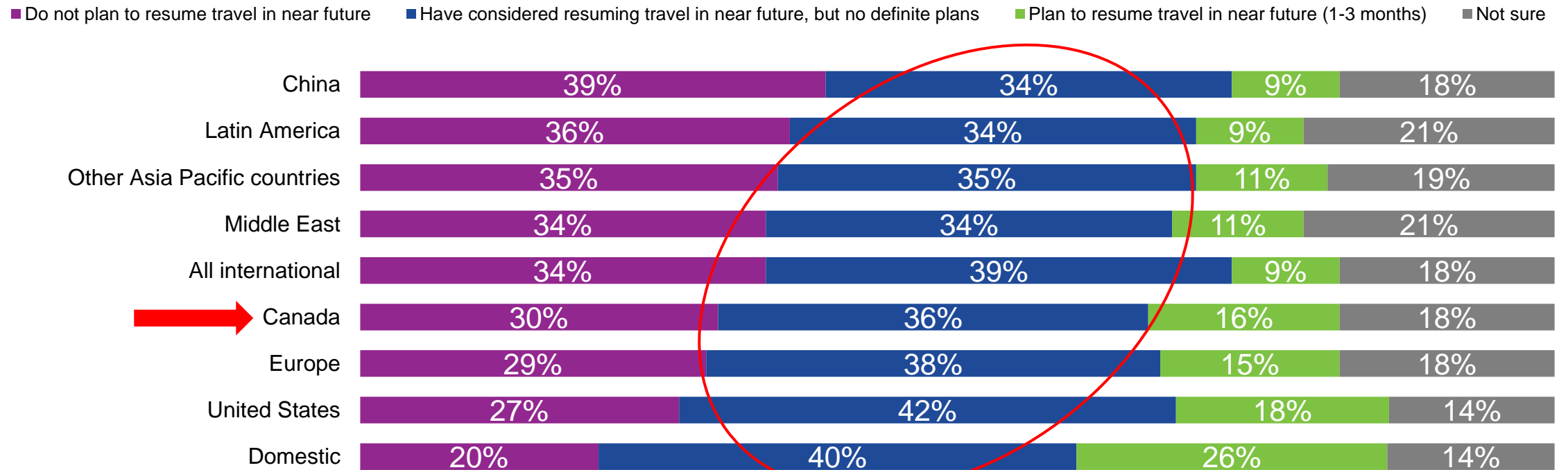


30% Our bookings have decreased

Note: Question only displayed to respondents who work for an airline, hotel chain, hotel property, TMC, or ground transportation company

Companies Consider Resuming Travel

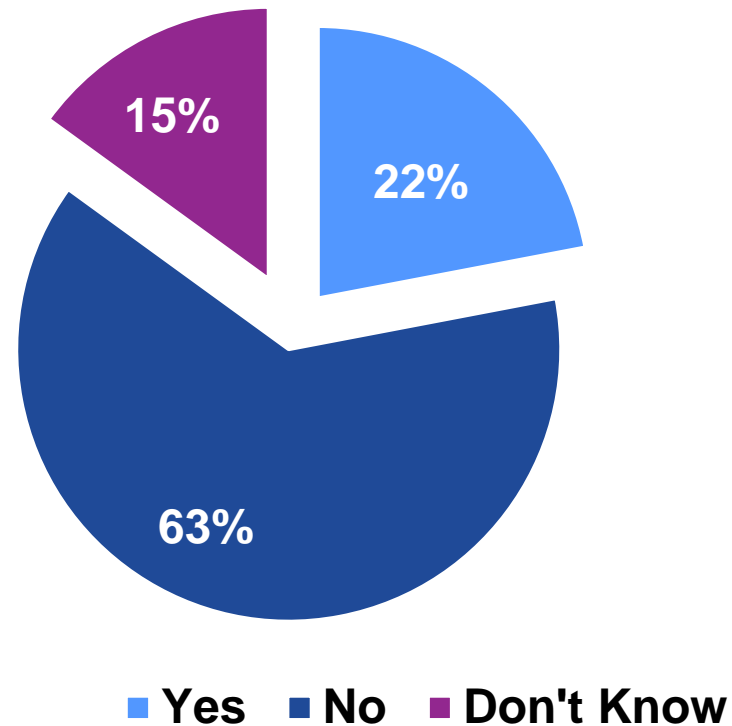
Are Companies Planning to Resume Travel to...?



Q. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

Note: Respondents only asked about countries/regions where they indicated their company has canceled or suspended most or all business travel (n=300-437)

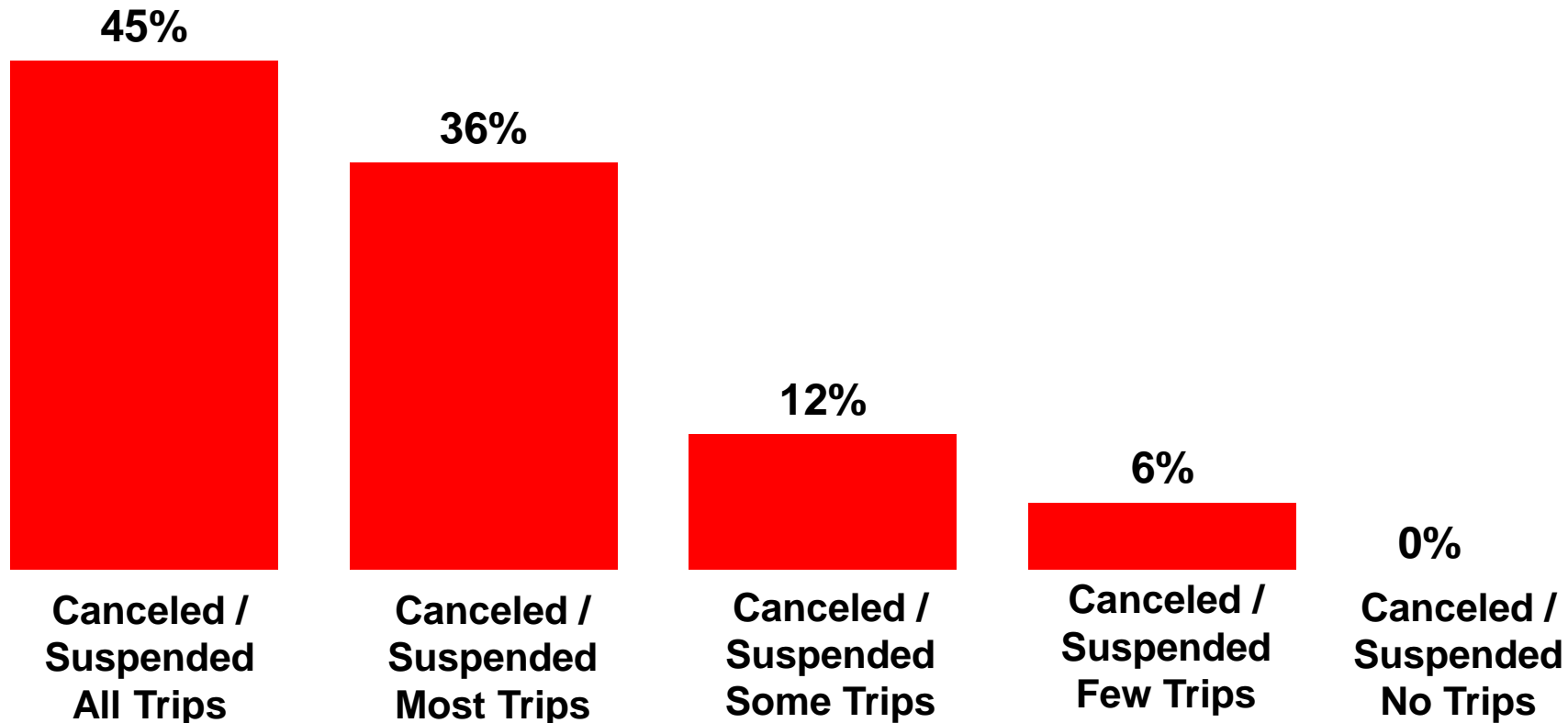
Does Return to Work = Return to Travel?





Business Travel Halted in Canada

Thinking about your company, how has the coronavirus impacted business travel to Canada?



Filtered for Canada-based respondents
n=33; caution low base

In Canada, Travel Managers Are Not Optimistic Trip Volumes Will Fully Recover in 3 Years

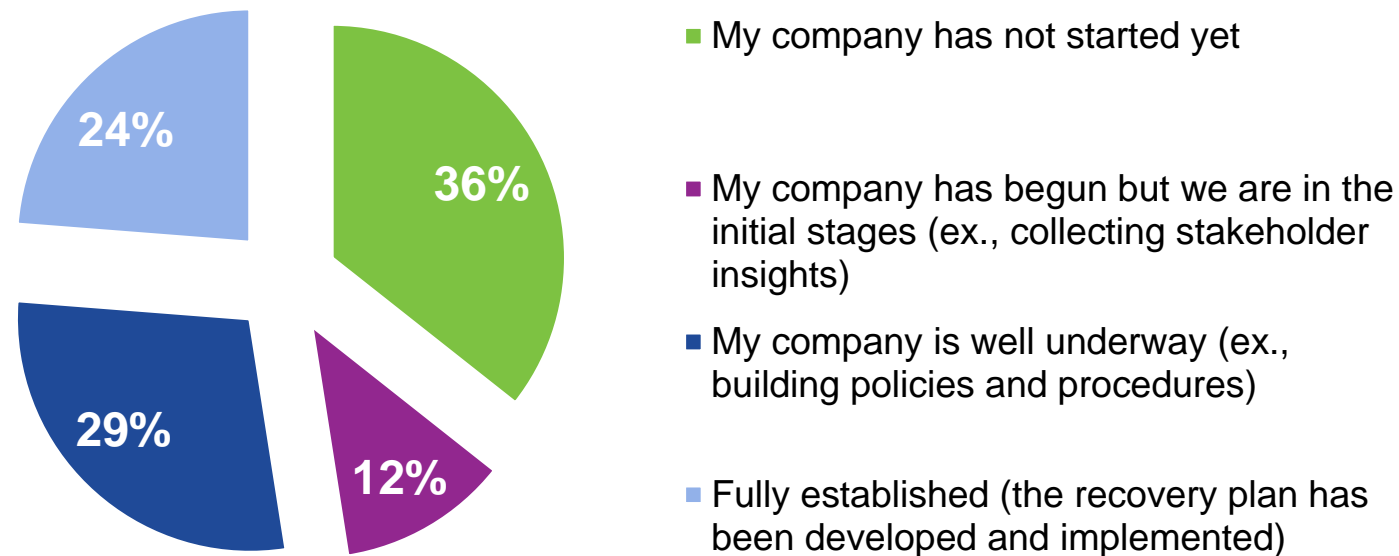
Post-Covid, how will the number of business trips change?



Note: 19% indicated “not sure”

In Canada, Two-Thirds of Companies Have Begun Travel Recovery Planning

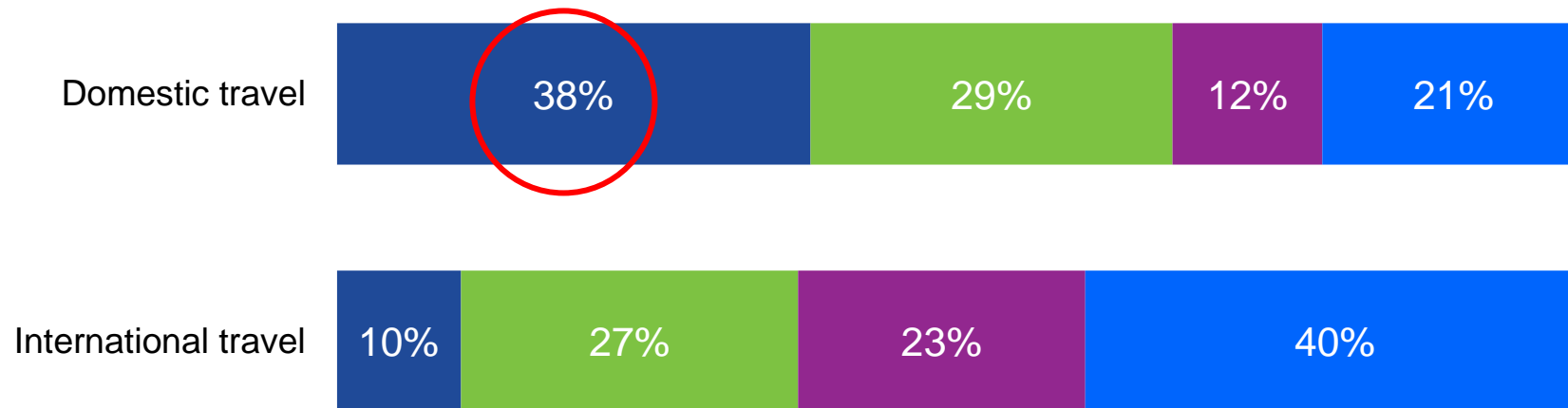
How would you characterize your company's travel recovery plan?



What's the Timeline?

Will travel resume within...?

■ 2-3 months ■ 6-8 months ■ 12 months or longer ■ Unsure



Many companies expect to resume **domestic travel** within 2-3 months. However, **international travel** may take longer

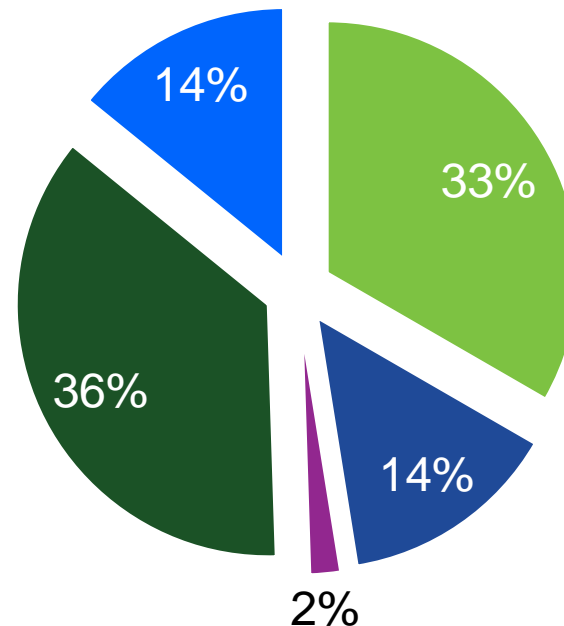
Q. You said your company has canceled or suspended business travel due to the Coronavirus. Do you expect travel to resume within the next. ...?

Note: Question only displayed to respondents who said their company has cancelled at least "a few" domestic or international trips as a result of the coronavirus (n=30-34)

Some Companies Will Provide PPE to Travellers



Will travel programs require or provide PPE?



- Yes, the company will provide it to travellers
- Yes, the individual traveller is required to provide their own
- No, we are not requiring or providing PPE for our travellers
- Not yet determined
- Don't know

Thank You!

Chris Ely
cely@gbta.org

Canadian Business Travel: Economic Outlook & Impact Snapshot

Jon Gray

Principal

Rockport Analytics

Jon.gray@rockportanalytics.com



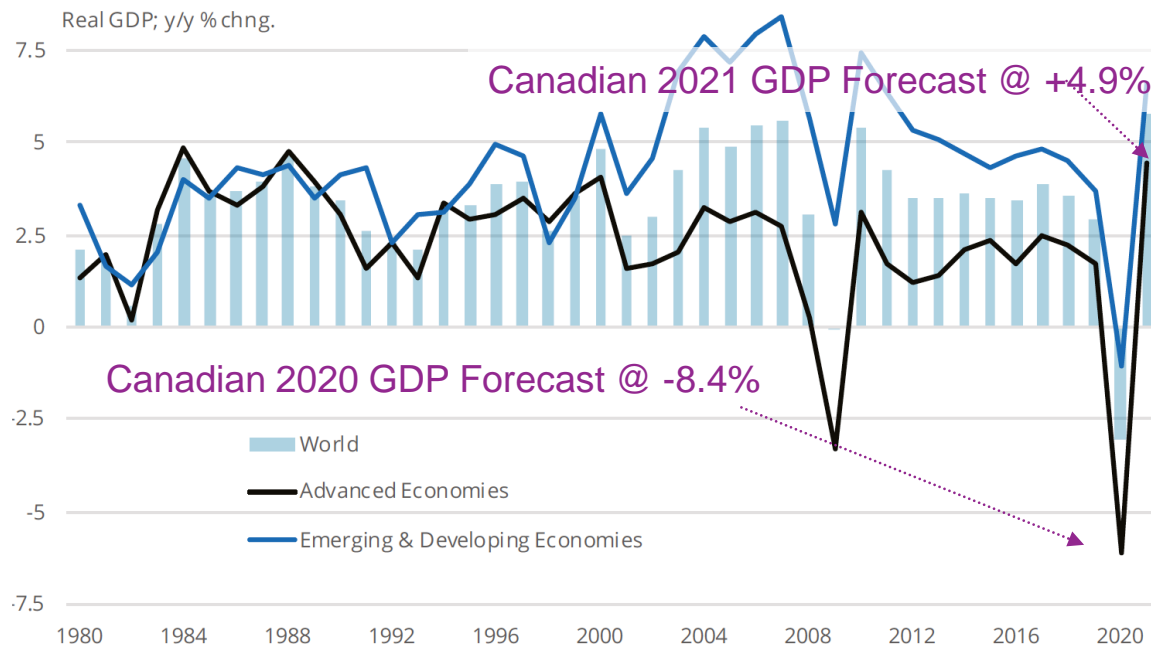
Canadian Business Travel: By The Numbers



Source: GBTA, Rockport Analytics

Canadian Economic Outlook

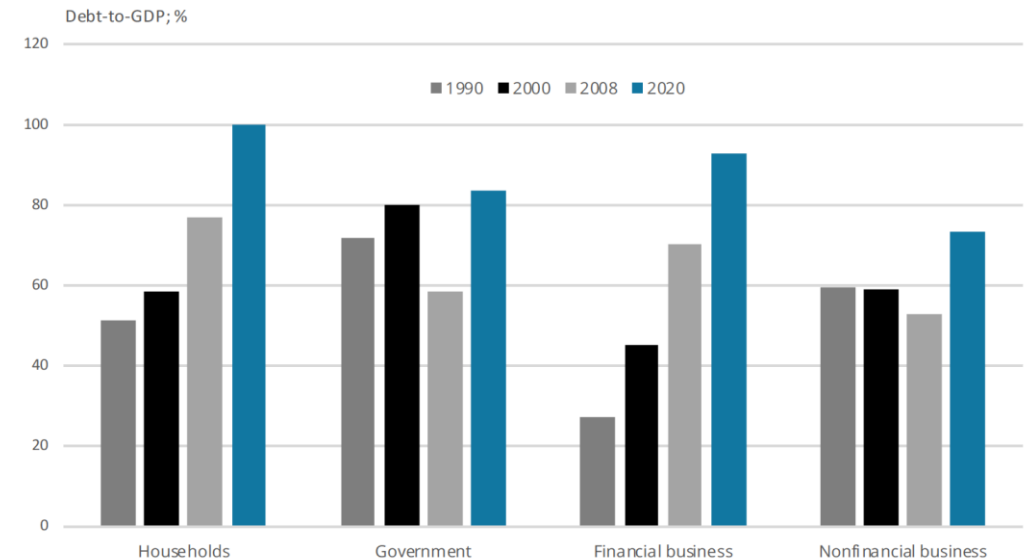
Unprecedented Declines in Economic Growth



Source: IMF

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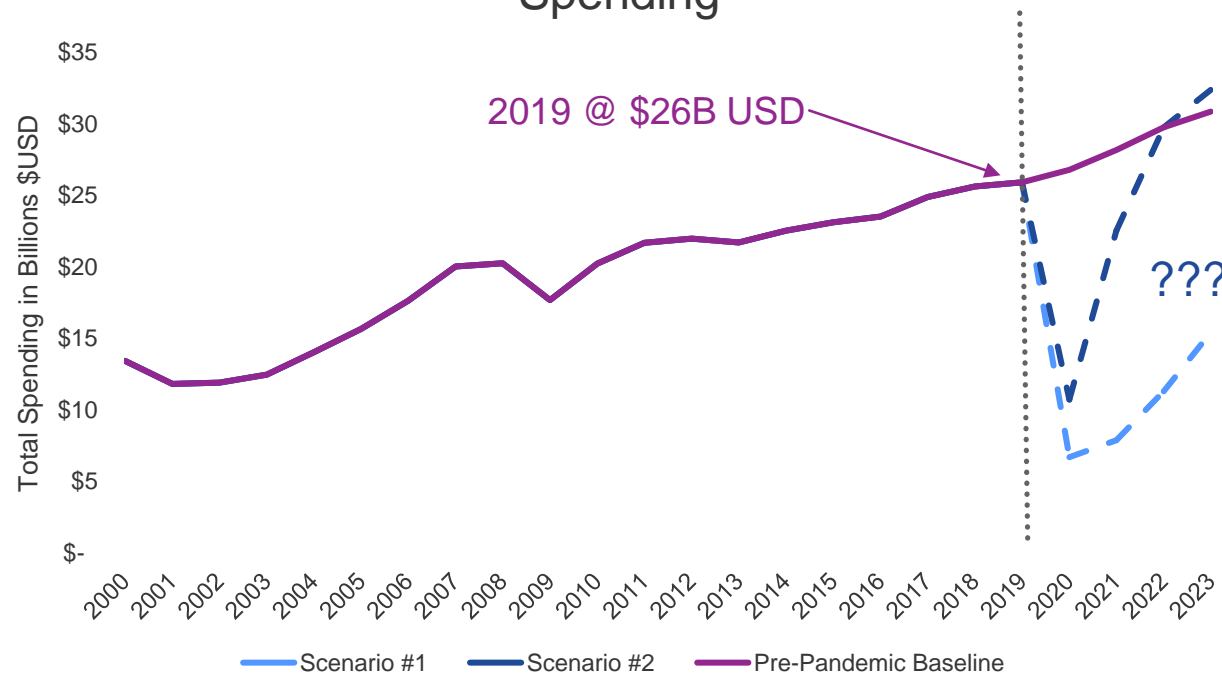
Debt Levels Will Hinder the Pace of Economic Recovery



Source: Statistics Canada, Deloitte Economic Advisory

Duration & Magnitude of Covid-19 Impacts Hinge on a Number of Key Factors

BTI™ Outlook For Canadian Business Travel Spending



Source: GBTA, Rockport Analytics

- Clearly a tremendous amount of uncertainty as to the shape and magnitude of the business travel recovery.
- International & group business travel tend to lag coming out of recession... this trend will be magnified given the dynamics of the pandemic.
- Keys factors impacting the outlook for Canadian business travel:
 - (1) Positive trajectory of the pandemic (i.e., continued reduction in case numbers, no second wave in the fall, deployment of a safe & effective vaccine)
 - (2) Business traveler sentiment
 - (3) Travel management policy
 - (4) Positive trajectory of the economic recovery- public policy and business management response
- Getting business travel back on track is critical to the broader economic recovery- the industry supports 573,000 Canadian jobs, \$40 billion in GDP and \$10.7 billion in federal and provincial tax revenue.

Thank You



Canadian Travel & Tourism Roundtable

Randi Rahamim

Managing Director

Teneo

Randi.Rahamim@Teneo.com



The Global CEO Advisory Firm

Canadian Travel & Tourism Roundtable

Prepared for: Global Business Travel Association

August 19, 2020



The Canadian Travel & Tourism Roundtable

I. Purpose

The Canadian Travel & Tourism Roundtable is comprised of leaders across the travel and tourism industry – with representatives from airlines, airports, hotels, and chambers of commerce across Canada. Our mission is to promote a responsible reboot of the travel and tourism industries. This includes advocating for responsible changes to government policy and building public confidence in the safety of travel.

II. Members



III. Activities

An Open Letter to the Prime Minister of Canada and all Premiers

Open Letter
Campaign



Interactive
#TimeToTravel Map



PRE-TRAVEL HEALTH
SCREENING

Health & Safety
Infographic

IV. Next Steps

The next phase of the campaign will be shifting focus to the importance of business travel, and the economic losses resulting from its decline. Opinion editorials and/or paid advertisements are being considered.

V. Contact



EN: <https://time-to-travel.ca/>
FR: <https://tempsdevoyager.ca/>



EN: @timetotravelca
FR: @voyageons_ca



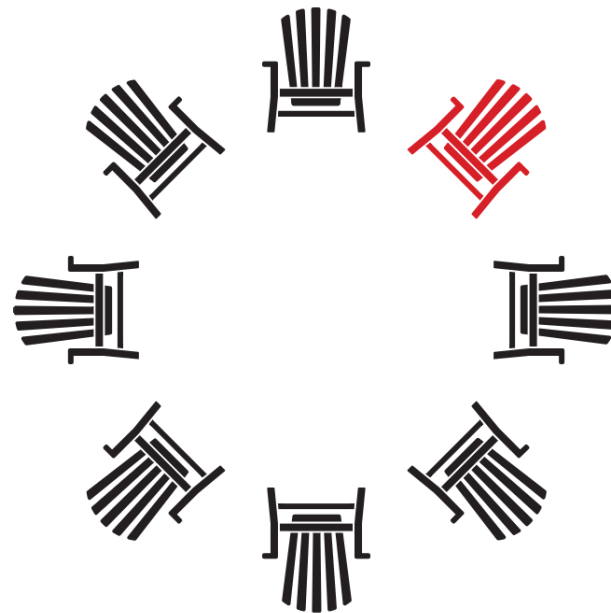
<https://www.linkedin.com/company/itstimetotravelca/>



About the Roundtable

IT'S TIME TO LET CANADIANS TRAVEL AGAIN.

Canadians are travelers. We think and act globally. Our Industry Roundtable was created with the aim of restoring Canadian pride in domestic travel, allowing individuals to explore our great country. Our members know that our people's intention is to learn to live within this new normal, not to hide from each other. We are resilient, adaptable, and believe we can find a responsible way to encourage domestic travel while promoting safe tourism.



#TimeToTravel

Thank You

Randi Rahamim, Managing Director, Teneo

Randi.Rahamim@Teneo.com

We're All In This TOGETHER

Thank you for Joining



Our Next Town Hall

Wednesday, September 23 @ 2pm EST

To RSVP: [CLICK HERE](#)

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Additional GBTA Resources

The following slides are resources with links to videos and web content to assist our business travel industry professionals in accessing GBTA information.

Visit us at:

gbta.org

Membership assistance at:

membercare@gbta.org

GBTA Honorary Membership

GBTA will provide business travel professionals who have been displaced due to the impact of coronavirus and the global pandemic a GBTA Honorary Membership. This membership will be valid for 12 months or until finding employment. GBTA is committed to helping the business travel community stay connected during this challenging time.

[**Apply for a GBTA Honorary Membership**](#)

Business Travel Resources – Return to Travel



[Canadian Re-Opening Plans Document – Province by Province](#)



[United States Re-Opening Plans Document – State by State](#)

Business Travel Resources – Return to Travel

Travel Sectors	Reference Site/Documents
International Air Transport Association (IATA) <i>Roadmap for Re-Starting Travel</i> <i>5 Principles to Re-Start Travel</i>	https://www.iata.org/en/pressroom/pr/2020-05-20-01/ https://www.gbta.org/Portals/0/Documents/canada/IATA-FivePrinciplesForRestartingAviation.pdf
International Civil Aviation Association (ICAO) <i>CART: Council Aviation Recovery Taskforce, Cover Letter & Taskforce Report</i>	https://www.gbta.org/Portals/0/Documents/canada/CART-Cover-letter-May-2020.pdf https://www.gbta.org/Portals/0/Documents/canada/CART-Report-final.pdf
Airlines for America (A4A) <i>Fly Smart Program</i>	https://www.airlinestakeaction.com/
Hotel Association of Canada <i>Stay Safe Program</i>	https://www.hacsafestay.com/

[CLICK HERE to access the full document](#)

GBTA resources available to our members

- Within GBTA Hub, discussions are taking place on forums regarding business travel issues. It's a great place to hear from other members about challenges and solutions to issues you may be currently facing – are you familiar with how to use the Hub?

Navigate and Utilize the GBTA Hub (Earn 1 GTP Credit) - [Watch Recording](#)



How do I access the GBTA Hub?



You can access the hub by going to hub.gbta.org. You will need to log-in with your GBTA username and password.

Within the [GBTA Hub](#) discussions are taking place on forums regarding business travel issues. It's a great place to hear from other members about challenges and solutions to issues you may be currently facing. Want to learn how to navigate and utilize the GBTA Hub view the [training](#) or the [User Guide](#).

GBTA HUB Resources

[Navigate and Utilize the GBTA HUB Training Webinar](#)

[GBTA Hub User Guide](#)



New Forums Added to the GBTA HUB

GBTA Members can connect online and discuss current and relevant topics within the business travel industry across multiple forums with business travel buyers and suppliers.

New Forums Added:

- In the **COVID-19 Forum**, stay connected and discuss COVID-19 related topics with other business travel professionals.
- In the **Resources from Allied Members Forum**, Allied Members can post content and updates to help business travel professionals through COVID-19.

Join the conversation - <https://hub.gbta.org/home>



GBTA has a number of resources available

- GBTA Daily News Brief. Great resource to stay current with everything that's happening.



Are you receiving the Daily News Brief?

Log into the GBTA website main page, scroll down to the “Join Our Mailing List” section and they will be added to the mailing list. <https://www.gbta.org/>

I agree to receive communications from GBTA and understand I may update my preferences, or opt-out of communications from GBTA, as referenced in the [Privacy Policy](#).

Join Our Mailing List

Join



GBTA is here to support you with Career and Personal Development

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Webinar - Managing a Prolonged Crisis 2020 and Beyond

[Watch Recording](#)



Earn GTP® Recertification Credits

The GTP® Recertification Program is designed as a continuum of learning and professional development. Recertification helps you stay well-versed in concepts, technology, principles, and best practices shaping the industry. GBTA Academy has released resources on Risk Management, Travel Program Administration, Data Analytics, and Buyer/Supplier Relationships.

Learn More - <https://www.gbta.org/professional-development/gtp-certification/gtp-recertification>



Multimedia - GBTA Industry Forum Series

- Arne Sorenson, Marriott International
- Patrick Pacious, Choice Hotels
- Robert Isom, American Airlines
- Bhart Sarin, GBTA President
- Tobias Ragge, HRS
- Gabe Rizzi, Travel Leaders Corporate
- Ariel Cohen, TripActions
- Mark Vondrasek, Hyatt Hotels Corporation
- David Kong, BWH|Hotel Group
- Tom Nealon, Southwest Airlines

[View All Multimedia >>](#)



Arne Sorenson, Marriott International



Patrick Pacious, Choice Hotels



Robert Isom, American Airlines

GBTA Academy Webinars and Online Training Today

GBTA Academy provides education for business travel professionals at every level of his/her career; whether you are new to business travel management or have decades of experience there is always a “next step” on the GBTA learning path. GBTA Academy is launching weekly webinar series to include: Current Trending Topics:

- Industry Webinar Series
- Career Development Webinars
- Personal Development Webinars

<https://www.gbta.org/professional-development/programs-by-format/upcoming-webinars-and-online-trainings>



Industry Webinar Series | Career & Personal Development Online Tutorials

- Managing a Prolonged Crisis 2020 and Beyond - [Watch Recording](#)
- Navigate and Utilize the GBTA Hub (Earn 1 GTP Credit) - [Watch Recording](#)
- Designing or Redefining Your Personal Brand - [Watch Recording](#)
- Leadership through Communication: Navigating the COVID-19 Crisis - [Watch Recording](#)
- Leading Remote Teams: Navigating the COVID-19 Crisis - [Watch Recording](#)
- COVID-19 and the Hospitality Industry: Priorities and Action Steps for Human Resources - [Watch Recording](#)
- Managing Workplace Conflict: Navigating the COVID-19 Crisis - [Watch Recording](#)

[View Upcoming Industry Webinars, Career & Personal Development Online Tutorials](#)

Post and Search Business Travel Jobs via GBTA Career Centre

Search jobs, post your resume and access resources to help your job search including a complimentary resume review and job search resource center.

If you are an employer, there are opportunities to post your job description and access thousands of qualified business travel professionals.

View jobs - <https://jobs.gbta.org/>



News & Advocacy

Business Travel Has Stopped. No One Knows When It Will Come Back. Apr. 20, 2020

Global Business Travel Becomes the Latest Casualty of the Coronavirus Pandemic Apr. 8, 2020

GBTA Welcomes EU Suspension of Airport Slot Rule until 24 October 2020, to Ease Industry Crisis following the Coronavirus Pandemic Mar. 31, 2020.

Business Travel Halts Across the Globe

GBTA Signs on to Industry Requests to Congress in Key Verticals of Global Business Travel [PDF]

Business Travel Sector to Lose \$820 Billion in Revenue on Coronavirus Hit: Industry Group

Resources

[Government of Canada Coronavirus disease \(COVID-19\): Outbreak update](#)

[Government of Canada Coronavirus disease \(COVID-19\) in China](#)

[Travel Advice and Advisories - China](#)

[Novel Coronavirus infection: Frequently Asked Questions \(FAQ\)](#)

Social media: follow @TravelGoC on [Facebook](#) and [Twitter](#)

[Statement by the Minister of Health on the First Presumptive Confirmed](#)

[Travel-Related Case of New Coronavirus in Canada](#)

[Statement by Foreign Affairs Minister on travel to Hubei Province in China](#)



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