

We're All In This TOGETHER



GBTA Canada Town Hall

Wednesday, February 24 @ 3pm EST

Connecting the people that connect the world.™





Nancy Tudorache

Regional Vice President, Canada
GBTA

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Welcome 2021



Stricter public health measures come into effect at Canadian borders, airports



Trudeau suspends flights to sun destinations, will force travellers to quarantine at \$2,000 expense

NEWS

As flight service collapses in Atlantic Canada under strain of COVID-19, some worry the region's being cut off from the rest of the country

Trudeau said the government is enacting the tough measures now and is committed to a safe restart to travel and tourism as soon as conditions improve. "ideally, later this year."



POLITICS | News

New COVID-19 testing rules for travellers to Canada to begin Jan. 7



Town Hall Agenda

- **GBTA Updates:** And there are SOOO MANY
- **GBTA BTI™ Outlook - Canadian Impact 2020 and Forecast for 2021 and Beyond**
made possible by Enterprise Holdings
 - *Jon Gray, Economist, Rockport Analytics*
- **Canadian Aviation Sector Update**
 - *Mike McNaney, President & CEO, National Airline Council of Canada*

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 **Q&A box** on Zoom.

Questions will be answered only if time permitting.

For Assistance during the town hall e-mail:
info@gbta.org





Dave Hilfman
Interim Executive Director
GBTA



Suzanne Neufang
Executive Director
GBTA

GBTA Canada Grows Volunteer Network in 2021



NEW to the GBTA Canada Advisory Board

Chuck Crowder

Board Member

Vice President Sales & Distribution
WestJet Airlines

Patrick Doyle

Board Member

Vice President & General Manager,
Canada
American Express Global Business
Travel

Vito Curalli

Board Member

Executive Director of International
Sales and Industry Relations
Hilton

Brooke Davis

Board Member

Global Travel & Events Manager
lululemon

Bertie Fernandes

Board Member

Corporate Travel Manager
Ledcor Group of Companies

Jon Heppenstall

Board Member

Manager Sourcing Operations,
Corporate Services
Hydro One

NEW GBTA Canada Committees

Accommodations Committee:

Chair, Stephanie Snowball, IHG
Vice-Chair, Jodi Francks, Fairmont Hotels

Risk Committee:

Chair, Kate King, ISOS
Vice-Chair, Suzanne Sangiovese, Riskline

Technology Committee:

Chair, Greg Allworth, Chrome River
Vice-Chair, Kristen Hrycoy, SAP Concur

Transportation Committee:

Chair, Monica McKill, Cenovus
Vice-Chair, Marayka Wilson, United

Meetings & Events Committee:

Chair, Joe Nishi, Meeting Encore
Vice-Chair, Loren Christie, LC Solutions



A stage with red curtains and spotlights illuminating the text.

Introducing GBTA Canada 2021




EVOLVE
NOW PLAYING APRIL 15 -17 IN TORONTO.

WINNER
BEST DOCUMENTARY FILM
2019

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GBTA CONFERENCE 2019
TORONTO


EVOLVE
NOW PLAYING APRIL 15 -17 IN TORONTO.

WINNER
BEST DOCUMENTARY FILM
2019

WINNER
BEST FILM
2019

OFFICIAL
SELECTION
2019

Scott Turyk

Director, Sales & Marketing
Sheraton Centre Toronto
Scott.Turyk@Sheraton.com



We're Creating a New Place to Gather



GBTA Canada 2021

gbta.org/canada

Webinars

March 11:
Risk Committee

April 22:
Technology Committee

August 26:
Accommodations Committee

October 28:
Transportation Committee

December 9:
Meetings & Events Committee

Direct Talks

March 9:
Canadian Buyer Toolkit

April 14:
Canadian Buyer Toolkit

June 30

October 14

November 10

December 14

Town Halls

February 24

April 7

June 23

November 3

READY. SAFE. TRAVEL. TRAINING

May 2021



READY.
SAFE.
TRAVEL.
by GBTA

Become a *Ready. Safe. Travel. Specialist* with this
4-Week Training Program gbta.org

READY. SAFE. TRAVEL. TRAINING



**READY.
SAFE.
TRAVEL.**
by GBTA

Ready. Safe. Travel. Specialist

Participate in a 4-week virtual training program that will take place once-weekly for 3 hours per week during May 2021

May 5, 12, 19 & 26

Early Bird registration rate from \$75 USD

Register with a Special Canadian Offer:

\$25 OFF valid until Friday, March 12

Promo Code: CARST2021

Visit: gbta.org or [CLICK HERE](#)

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GBTA BTI™ Outlook - Canadian Impact 2020 and Forecast for 2021 and Beyond

Ian Dale

Assistant Vice President,
Business Development, Canadian Operations
Enterprise Holdings
Ian.Dale@ehi.com

+ THE COMBINED POWER OF



GBTA BTI™ Outlook - Canadian Impact 2020 and Forecast for 2021 and Beyond

Jon Gray

Principal

Rockport Analytics

Jon.gray@rockportanalytics.com



What is the Global BTI™?



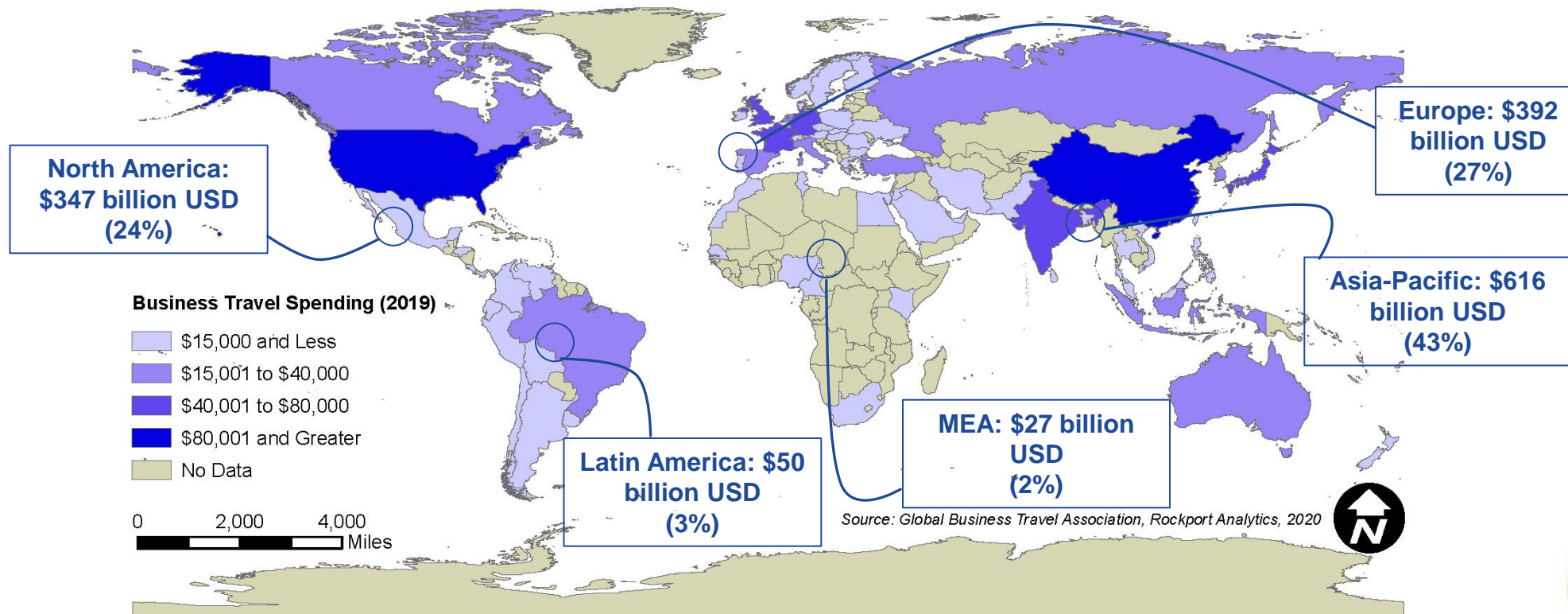
- The 2020 study was our 12th consecutive annual GBTA Global BTI™ study
- Demand-side measurements of business travel -all types of business trips and all spending while on a trip
- Input/output approach puts T&E on par with labor, material, and other business inputs
- Travel spend is a function of industry sales & sector travel intensity
- Projections driven by global economy, travel productivity, travel supply capacity, travel pricing, and relevant policy issues
- 73 countries by 44 industries historic trends and projections –the GBTA BTI™ Global “Datacube”

2020 Global BTI™ Outlook: Global Overview

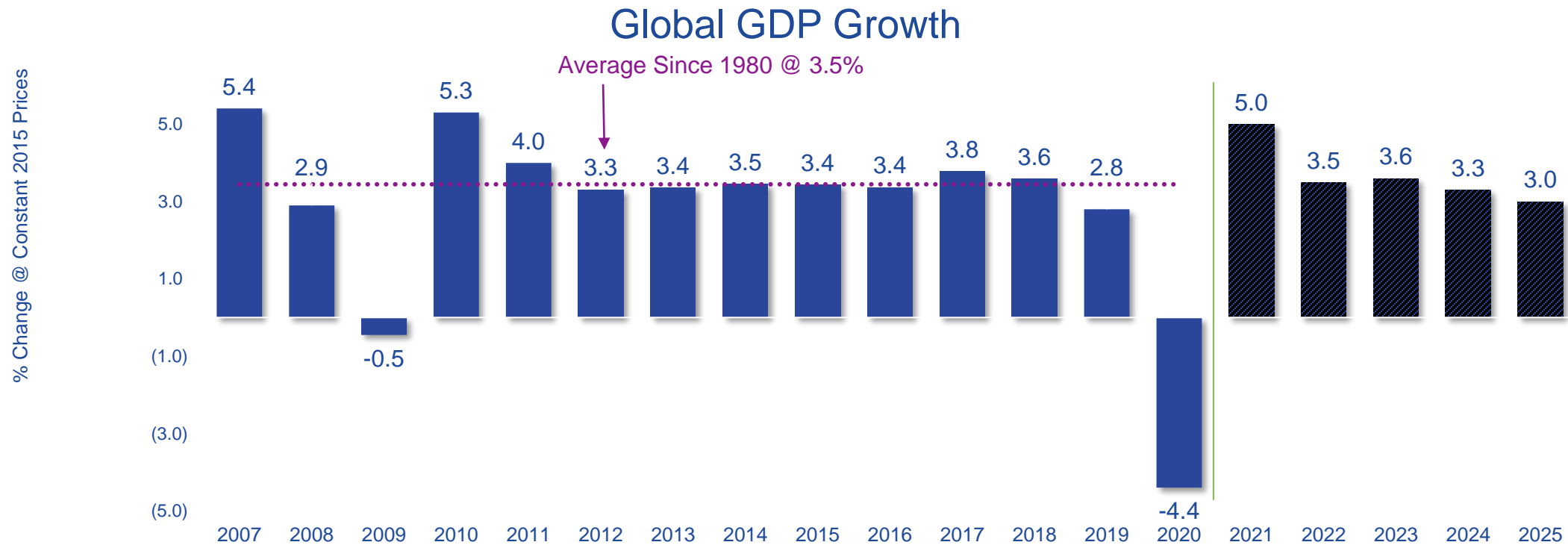
Global Macroeconomic Overview & Business Travel Prospects

Business Travel Activity Amassed \$1.43 Trillion in Global Spending in 2019

2019 Business Travel Spending by Country (in Billions)

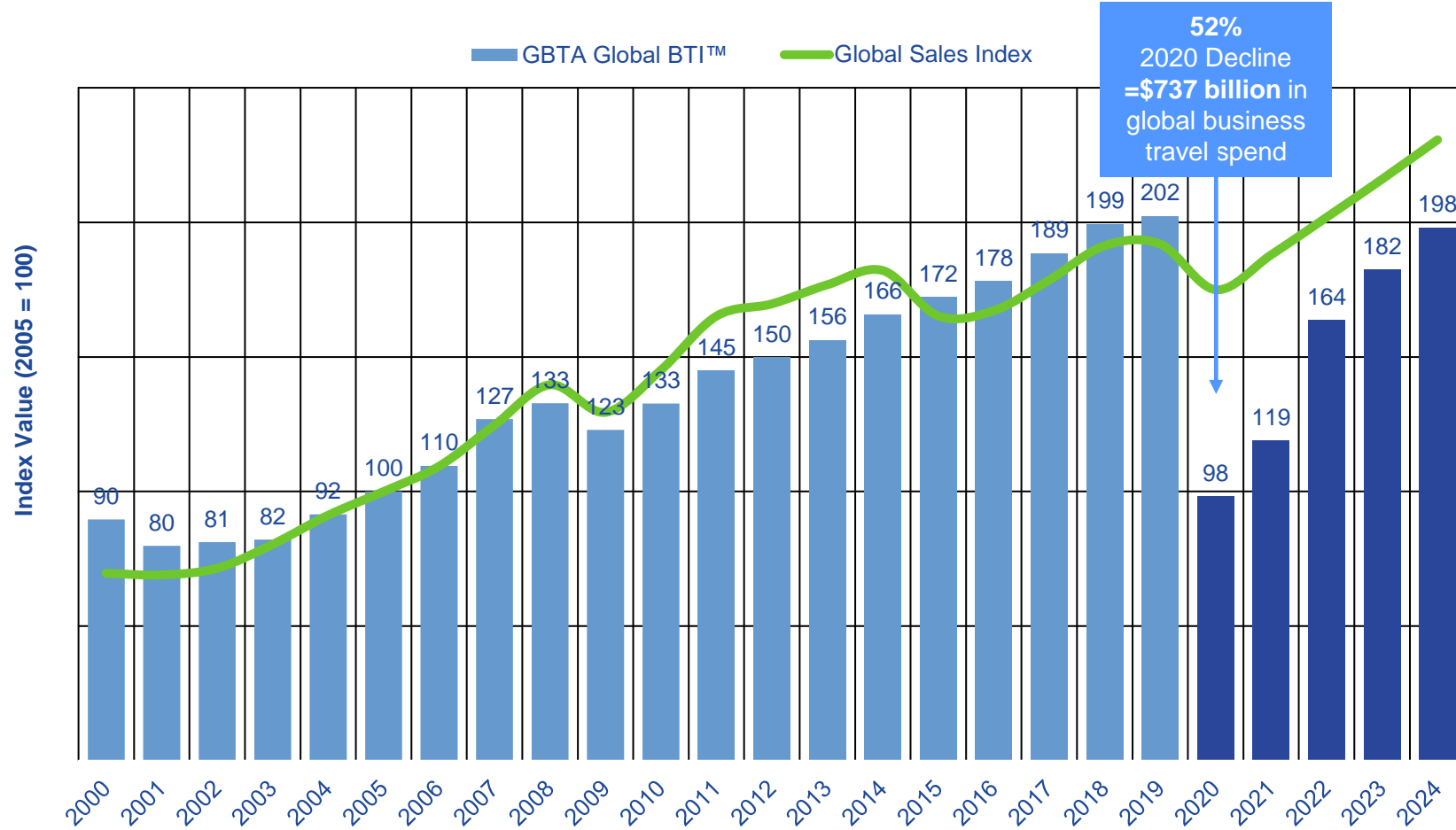


The Global Economy Contracts an Estimated 4.4% in 2020, Largest Contraction Since 1946, Post WWII



Source: IMF, Wells Fargo Securities, OECD, Rockport Analytics

Global GBTA BTI™ and Global Sales (Indexed)



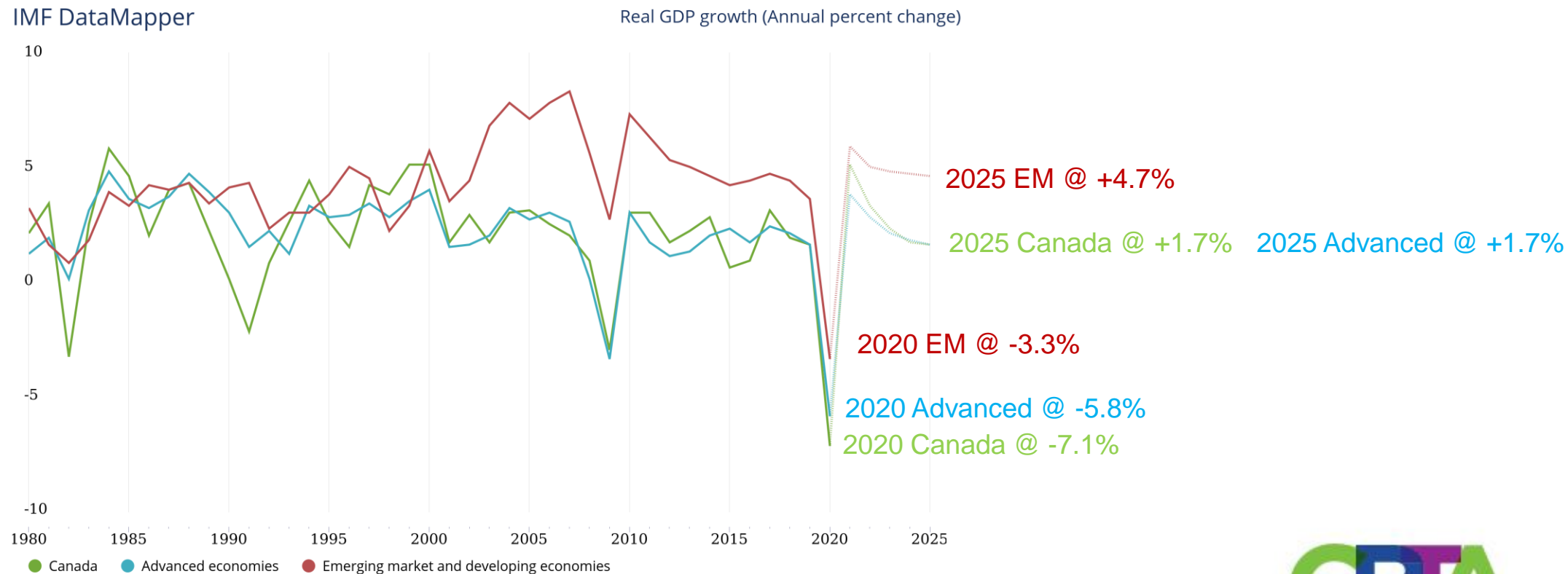
- The Global BTI™ indexes global business travel spending over time (base year = 2005)
- Business travel has become more productive over time, i.e., over time it takes a relatively smaller business travel investment to generate each dollar in sales
- Business travel is a key input to revenue generation with the two measures moving in tandem (until 2020)

2020 BTI™ Outlook: A View From Canada

Canadian Macroeconomic Overview & Business Travel Prospects



Canadian GDP is Set to Rebound in 2021 But Tail Off Through the Forecast Horizon



©IMF, 2020, Source: World Economic Outlook (October 2020)

Containment Indices Measure COVID-19 Lockdowns Across Countries

	2020										2021					
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
USA	45	78	63	50	48	48	48	49	54	60	56	56	45	28	20	20
Canada	53	83	75	53	49	44	46	54	64	67	67	61	50	38	30	25
UK	44	86	83	67	52	48	38	41	67	64	86	86	57	36	33	29
Germany	41	74	53	29	19	19	24	38	52	69	81	66	48	43	36	24
France	43	81	69	31	19	19	29	38	76	64	64	64	54	42	29	19
Italy	100	100	74	62	48	48	33	43	67	67	62	62	48	33	33	29
Spain	49	95	76	62	43	43	33	41	52	52	52	52	43	33	33	29
Mainland China	47	30	19	14	14	14	10	14	14	19	22	24	19	12	9	9
India	29	92	86	67	67	67	62	55	52	52	54	57	57	42	30	25
Japan	33	38	41	31	27	29	27	19	19	19	29	19	19	14	14	14
Brazil	4	46	84	73	55	52	48	38	33	38	33	24	24	24	24	24
Russia	15	59	67	38	34	20	20	20	24	24	24	22	20	19	14	10
Global 12	43	64	54	41	36	36	34	36	42	46	48	46	37	26	20	18

Source: IHS Markit

Business Confidence: A Key Driver of Business Travel Activity

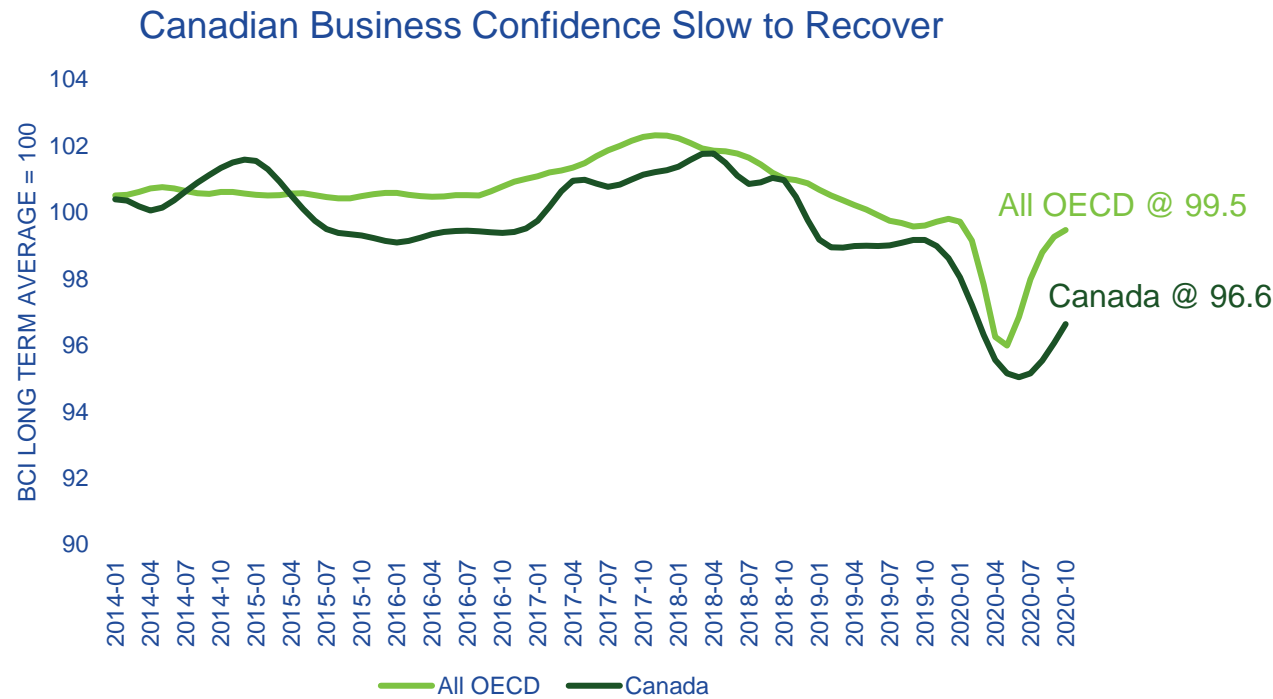
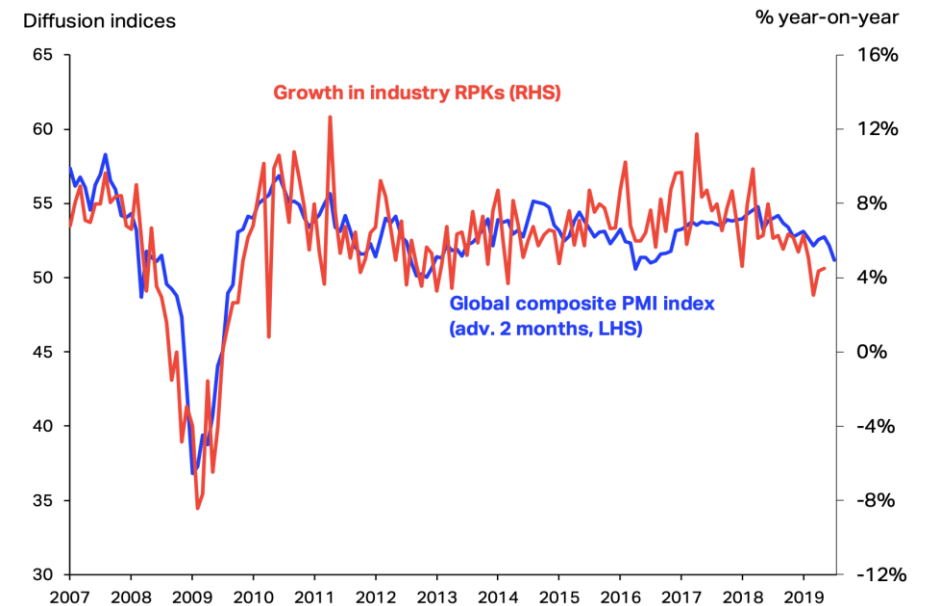


Chart 2 – RPK growth and global business confidence

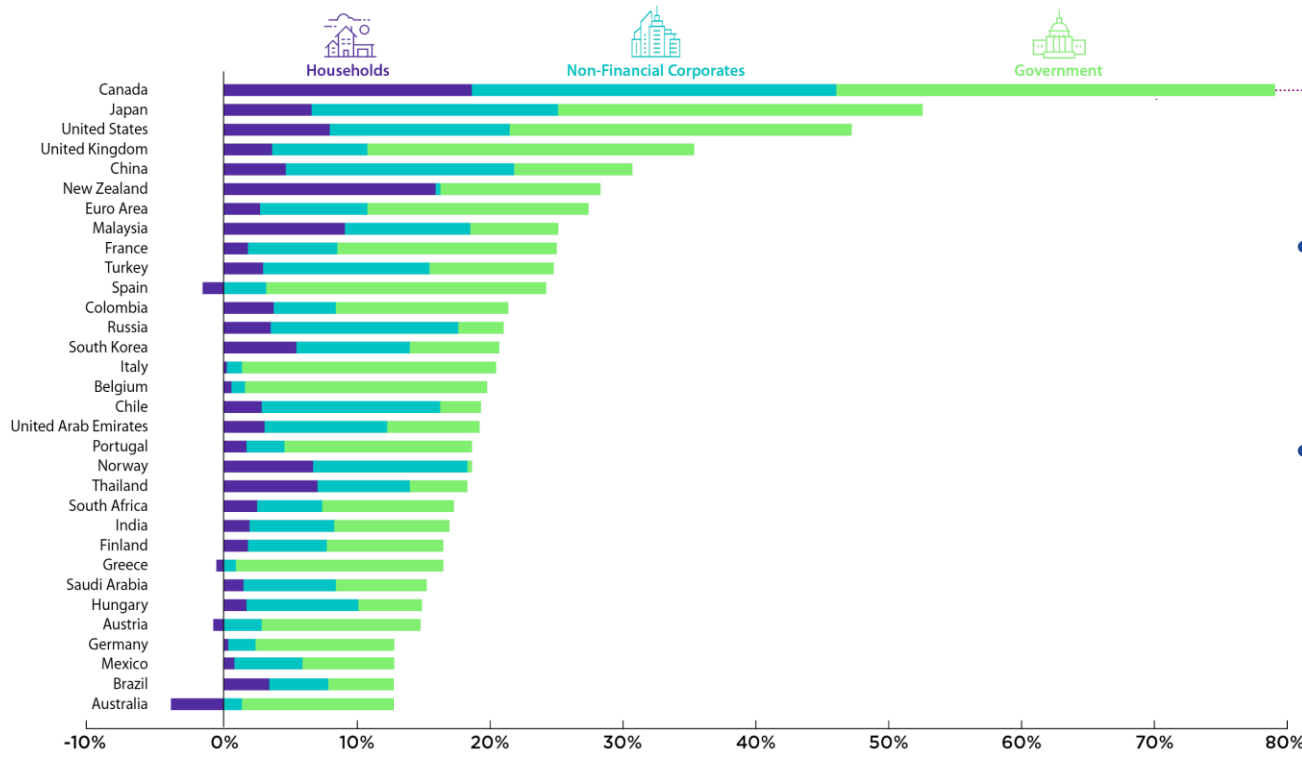


Sources: IATA Economics, IATA Monthly Statistics, Markit

Canadian Corporate, Household and Government Debt All Rise Sharply in 2020

CHANGE IN DEBT-TO-GDP

(Q42019–Q32020)



Not including the financial sector, Canada's debt-to-GDP ratio increased by nearly 80% through 2020

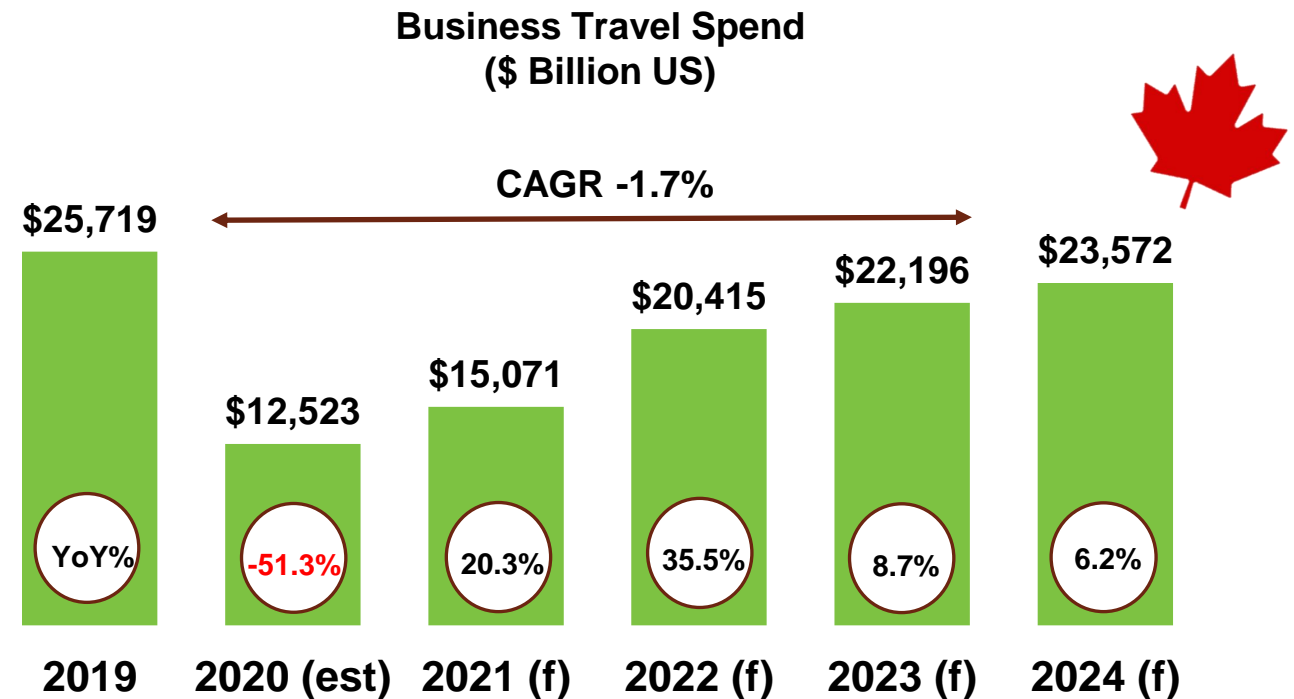
- Debt levels and low interest rates will help to support the economic recovery in the near-term, however...
- This will act as a headwind for more sustainable economic growth in the long-run and will challenge business travel's return to pre-pandemic levels

Source: IIF, Deutsche Bank

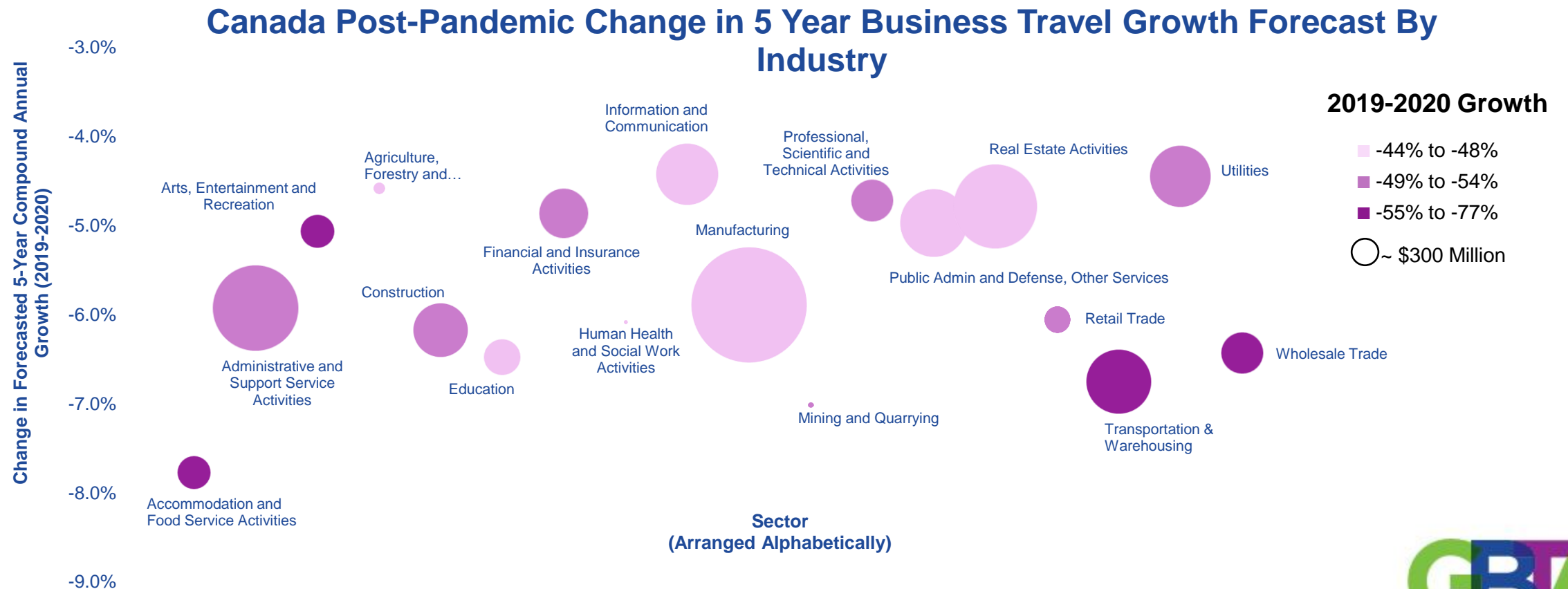
visualcapitalist.com









Canadian Business Travel Spending Outlook

- Business travel activity in the Canada totaled \$25.7B annually in 2019.
- Business travel spending plummeted an estimated -51% to \$12.5B in 2020.
- We expect a bounce back in but recovery will be slow. Headwinds include: slow start to national vaccination effort, extremely restrictive national travel policy, lagging business confidence and unprecedented debt levels, which will be a headwind to economic growth.
- We expect business travel expenditures in Canada to total \$23.6B by 2024 – 92% of annual, pre-pandemic totals.



Canadian Business Travel By Sector



Country		2019		2024 (f)		Rank Change
		Rank	\$bil	Rank	\$bil	
	China	1	\$382	1	\$521	--
	U.S.	2	\$313	2	\$227	--
	Germany	3	\$78	4	\$55	-1
	Japan	4	\$65	3	\$60	+1
	U.K.	5	\$53	6	\$40	-1
	France	6	\$43	7	\$36	-1
	India	7	\$41	5	\$44	+2
	South Korea	8	\$38	8	\$32	--

Country		2019		2024 (f)		Rank Change
		Rank	\$bil	Rank	\$bil	
	Italy	9	\$36	10	\$27	-1
	Brazil	10	\$30	9	\$27	+1
	Canada	11	\$26	11	\$24	--
	Spain	12	\$24	16	\$20	-4
	Australia	13	\$24	12	\$21	+1
	Netherlands	14	\$22	15	\$20	-1
	Russia	15	\$20	17	\$14	-2
	Indonesia	16	\$19	13	\$21	+3

Questions?

Jon Gray
Principal, Rockport Analytics
Jon.gray@rockportanalytics.com

Canadian Aviation Sector


Mike McNaney
President & CEO
National Airlines Council of Canada



NACC
National Airlines
Council of Canada



Coming Up With GBTA:




New - GBTA Academy Scholarship Opportunities


Get a scholarship to GBTA Academy courses



WINiT by GBTA Virtual Awards Gala - March 8



Rates Increase Mar. 1 - Register for GBTA Convention 2021



READY. SAFE. TRAVEL. GBTA CONVENTION 2021 - ORLANDO July 17-21

Call For Proposals Deadline Extended - Feb 26



READY. SAFE. TRAVEL. TRAINING

Register - Ready. Safe. Travel. 4-week virtual workshop

For details visit gbta.org

We're All In This TOGETHER

Thank you for Joining



Our Next Town Hall

Wednesday, April 7 @ 2pm EST

Connecting the people that connect the world.™



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**](#)

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