



2022 GBTA Business Travel Recovery Poll

June 23, 2022

POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 39%
- Procurement/sourcing professional: 6%
- Supplier: 42%
- TMC: 6%
- Other: 7%

2. [If supplier or TMC]: Which of the following best describes the company you work for?

- Hotel chain: 37%
- Travel management company: 15%
- Ground transportation: 8%
- Individual hotel property: 12%
- Travel technology: 6%
- Airline: 12%
- Meetings management provider: 0%
- Payment company: 2%
- Consultant: 7%
- Other: 7%



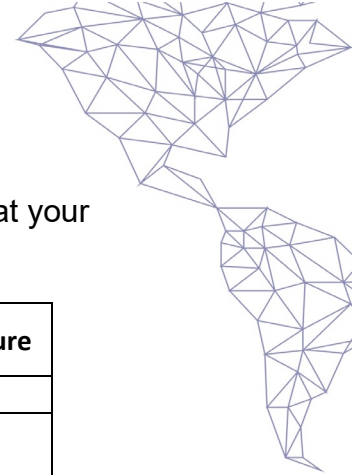
3. [DISPLAY IF Q2 = BUYER] Which of the following industries best describes your organization?

- a. Accommodation and Food Services: 1%
- b. Arts, Entertainment, and Recreation: 3%
- d. Construction: 3%
- e. Consulting: 5%
- f. Educational Services: 1%
- g. Engineering: 3%
- h. Finance and Insurance: 12%
- i. Health Care, Pharmaceuticals and Social Assistance: 9%
- j. Manufacturing: 13%
- k. Media, Information, and Communications: 2%
- l. Mining, Oil and Gas Extraction and Utilities: 7%
- m. Non-profit, Association and Foundation: 8%
- n. Professional, Scientific and Technical: 3%
- o. Public Administration: 0%
- p. Retail / Wholesale Trade: 3%
- q. Software/Technology: 12%
- r. Telecommunications: 1%
- s. Transportation and Warehousing: 1%
- t. Travel and Meetings Management: 3%
- u. Other (please specify): 10%

4. Which of the following best describes your company's current position on employees traveling for business?

	Not allowed	Rarely allowed	Sometimes allowed	Usually allowed
Non-essential domestic business trips	4%	7%	19%	70%
Non-essential international business trips	9%	12%	28%	50%



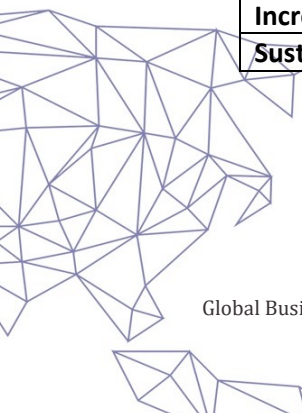


5. What impact have the following current affairs had on the travel program at your company?

	Significant impact	A minor impact	No impact	Not sure
Staffing shortages	41%	29%	23%	7%
Government policies and restrictions	39%	37%	16%	8%
Covid infection rates and variants	38%	41%	15%	6%
Inflation	32%	39%	20%	9%
Oil prices	30%	35%	26%	9%
Supply chain bottlenecks	29%	35%	25%	11%
Strength of economy/risk of recession	27%	38%	26%	9%
Increased wage demands	20%	29%	34%	16%
Sustainability	17%	37%	38%	8%
Crisis in Ukraine	15%	42%	34%	9%

6. You mentioned some current affairs have impacted the return to non-essential business travel at your company. How would you generally characterize the impact on the return to non-essential business travel at your company?

	Halting some business travel entirely	Stricter approval process requirements	Company reviewing travel policies	Not sure
Crisis in Ukraine	35%	21%	16%	28%
Covid infection rates and variants	29%	31%	27%	13%
Government policies and restrictions	26%	28%	31%	16%
Staffing shortages	24%	18%	24%	35%
Strength of economy/risk of recession	21%	26%	27%	27%
Supply chain bottlenecks	19%	18%	24%	39%
Inflation	16%	31%	32%	21%
Oil prices	15%	25%	32%	28%
Increased wage demands	12%	19%	29%	40%
Sustainability	4%	14%	56%	26%



7. To what extent have business travel policies evolved or changed at your company due to the pandemic?

- Fewer business trips overall: 39%
- Employees take fewer business trips, but there are more objectives and goals assigned to each trip completed: 37%
- More trip approval requirements: 24%
- A company re-evaluation of how employees will travel for business (ex: safety considerations, types of transport, sustainable hotel stays, etc.): 23%
- A company re-evaluation of why/who travels for business (ex: return to base travel, internal meetings, etc.): 22%
- There has been no change: 20%
- An overall company reevaluation of what it defines as “business travel”: 12%
- Other: 5%

8. [DISPLAY IF Q1=UK] To what extent have passport renewal delays and new visa requirements for UK citizens to enter some countries impacted business travel for employees at your company?

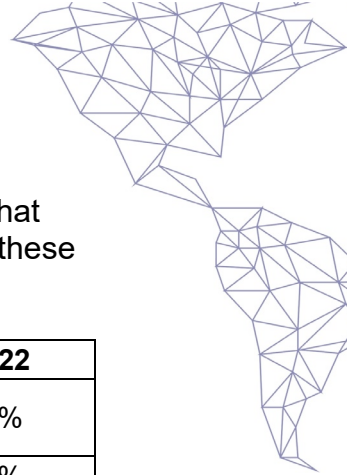
- Significant impact: 7%
- Moderate impact: 10%
- Minor impact: 23%
- No impact at all: 57%
- Other: 3%

9. [DISPLAY IF Q1=US] In the past 12 months, has your company had to pay for a traveler’s extended stay somewhere outside the United States because they caught COVID-19 while on a business trip?

- Yes: 24%
- No: 43%
- Don’t know: 34%

What was the approximate cost your company had to pay to extend the employee’s stay due to COVID-19? Your best estimate is fine.

- Mean (average): \$5,300



10. Thinking about business travel at your company in 2022, approximately what percent of your company’s travel spend will likely be allocated for each of these purposes?

Event Type	2022
Sales/account management meetings with current or prospective customers	31%
Conferences, trade shows, and industry events	21%
Internal company meetings with colleagues	17%
Service trips (such as repairs, training or equipment installation) with current customers	10%
Employee training and development	10%
Supplier meetings	9%
Other	3%
Total	100%

11. Are travelers at your company allowed to attend conventions and conferences in the second half of 2022?

- Yes: 98%
- No: 2%

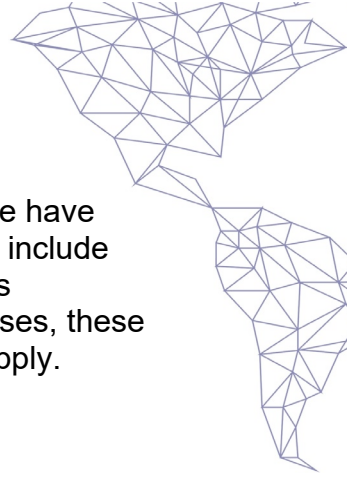
12. How concerned are employees at your company about COVID-19 and returning to business travel?

- Very concerned: 5%
- Somewhat concerned: 41%
- Neither concerned nor unconcerned: 26%
- Not concerned: 19%
- Not concerned at all: 9%

13. How concerned are employees at your company about returning to the office?

- Very concerned: 5%
- Somewhat concerned: 32%
- Neither concerned nor unconcerned: 25%
- Not concerned: 25%
- Not concerned at all: 12%





14. Thinking about your company's workforce, approximately what percentage have jobs that require them to travel for business on a regular basis? Examples include engineers who are required to travel to construction sites, or regional sales managers who are required to meet with clients in other cities. In some cases, these requirements are listed in job descriptions when prospective employees apply.

- Less than 20% of employees: 31%
 - 20% to less than 50% of employees: 36%
 - 50% or more: 23%
 - Don't know: 9%
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- The mean (average) is approximately 33% of employees whose jobs require business travel.

15. Even as business travel resumes, there remains some risk from COVID-19. Thinking about your travel program, does it have a process whereby employees—such as those who are uncomfortable or have pre-existing conditions-- can request to opt-out of business trips that they would otherwise be required to take for their jobs?

- Yes: 65%
- No: 14%
- Not sure: 21%

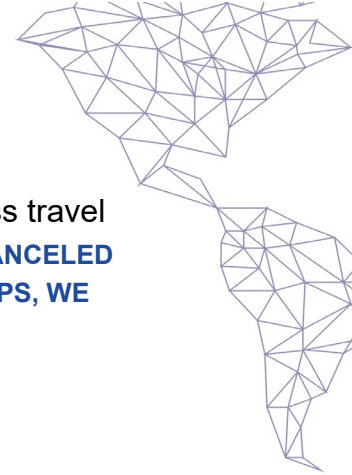
16. [DISPLAY IF Q15=YES] You mentioned your company has an opt-out process for business travel. Which of the following best describes your process?

- Employees can opt out of any trip they are uncomfortable taking: 63%
- We decide opt-out requests on a case-by-case basis: 31%
- Employees can opt-out under certain circumstances that we have defined (i.e., they are a certain age or have specific conditions such as cancer or autoimmune disorders: 4%
- Not sure: 2%
- None of the above: 19%

17. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 49%
- Somewhat willing: 40%
- Neither willing nor unwilling: 8%
- Not willing: 1%
- Not willing at all: 0%
- Not sure: 3%





18. Thinking about your company, how has the coronavirus impacted business travel to...? [MATRIX: WE HAVE CANCELED OR SUSPENDED ALL TRIPS, WE HAVE CANCELED OR SUSPENDED MOST TRIPS, WE HAVE CANCELED OR SUSPENDED SOME TRIPS, WE HAVE CANCELED OR SUSPENDED A FEW TRIPS, WE HAVE NOT CANCELED OR SUSPENDED ANY TRIPS]

- a. All international travel
- b. All domestic travel
- c. All travel, domestic and international

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
All International	14%	24%	25%	21%	16%
All Domestic Travel	5%	12%	20%	24%	39%
All Travel (Domestic and International)	5%	12%	30%	31%	21%

19. 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?

Region/Country	Plan to Resume Travel in Near Future (1-3 months)	Considering Resuming Travel in Near future, but No Definite Plans	Do Not Plan to Resume Travel in Near Future	Not Sure
All International Travel	56%	31%	6%	8%
All Domestic Travel	81%	11%	0%	8%
All Travel	76%	16%	0%	8%

20. [DISPLAY IF SUPPLIER/TMC] How do you currently feel about the business travel industry's path to recovery?

- Very optimistic: 24%
- Optimistic: 64%
- Neither optimistic nor pessimistic: 8%
- Pessimistic: 3%
- Very pessimistic: 1%



21. [DISPLAY IF AIRLINE, HOTEL, TMC, OR GROUND TRANSPORTATION] You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past week?

- Our bookings have increased: 84%
- Our bookings have remained the same: 11%
- Our bookings have decreased: 5%