We’re All In This TOGETHER

GBTA Canada Town Hall

Wednesday, August 19 @ 2pm EST

Connecting the people that connect the world.™
Connecting the people that connect the world.™

Nancy Tudorache
Regional Vice President, Canada
GBTA

Phone: 416-840-6128   E-mail: ntudorache@gbta.org
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.
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
Staycation Offer  ITS YOUR TURN TO TRAVEL

Book your exclusive GBTA Canada rate for a staycation at Shangri-La Hotel, Toronto

• **Shangri-La Cares**
  Commitment to safety of our guests and colleagues with 5-star service

• **Outstanding amenities**
  Al fresco dining on Shangri-La’s patio, resort-style pool, Miraj Hammam Spa, and more.

• **Our Staycation Offer;**
  $195 with complimentary breakfast for two, complimentary upgrade and late check-out at 4pm

**Booking Instructions**
Email: Reservations.slto@shangri-La.com
Phone: +1 647 788-8888
Website: Using the following [LINK](#)
Forward or onward movement or momentum
Sharlene Ketwaroo-Nanoo, GTP  
Canada, Regional Chair  
Category Manager, Service Delivery  
Rogers Communications

Linda Lee, GTP  
Executive Assistant  
Upstream  
Cenovus Energy Inc.

Geoffrey Parsons  
President  
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 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

**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]
<table>
<thead>
<tr>
<th>Date</th>
<th>Title</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUG 24</td>
<td>GBTA Collaboratory Webinar - TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>AUG 25</td>
<td>Are We Witnessing and Possibly Enabling the Dissolution of the Managed Travel Program as We Know It?</td>
<td>11:00 AM - 12:00 PM ET</td>
</tr>
<tr>
<td>AUG 26</td>
<td>To RFP or not to RFP: That is the 2021 Question</td>
<td>11:00 AM - 12:00 PM ET</td>
</tr>
<tr>
<td>AUG 27</td>
<td>Buyer/Supplier Partnership: Sharing Contractual Risk in the Age of COVID-19</td>
<td>11:00 AM - 12:00 PM ET</td>
</tr>
<tr>
<td>AUG 28</td>
<td>Ditch Your “Old School” Benchmarking &amp; Strive for “Best in Class”</td>
<td>11:00 AM - 12:00 PM ET</td>
</tr>
</tbody>
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Click here for more information
GBTA Canada Town Hall

*Wednesday, September 23 @ 2pm EST*

visit: gbta.org/Canada
GBTA Covid-19 Polling

Chris Ely
Research Director
GBTA
cely@gbta.org
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

* 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
<th>Cancellation Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>96%</td>
<td>Most (26%) or all (71%) trips to China</td>
</tr>
<tr>
<td>Other APAC</td>
<td>94%</td>
<td>Most (28%) or all (66%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)</td>
</tr>
<tr>
<td>Latin America</td>
<td>93%</td>
<td>Most (25%) or all (68%) trips to Latin America</td>
</tr>
<tr>
<td>Canada</td>
<td>88%</td>
<td>Most (31%) or all (57%) trips to Canada</td>
</tr>
<tr>
<td>United States</td>
<td>83%</td>
<td>Most (41%) or all (41%) trips to the United States</td>
</tr>
<tr>
<td>Domestic Travel</td>
<td>74%</td>
<td>Most (47%) or all (27%) domestic travel within their own country</td>
</tr>
<tr>
<td>European countries</td>
<td>90%</td>
<td>Most (35%) or all (55%) trips to European countries</td>
</tr>
</tbody>
</table>

Q. Thinking about your company, how has the coronavirus impacted business travel to…? (n=390-554)
Travel Suppliers Remain Pessimistic

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

- 5% are more optimistic than last week
- 60% feel the same as last week
- 36% are more pessimistic than last week

Note: Question only displayed to travel suppliers/TMCs

Q. The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a week ago, how do you feel about the industry’s path to recovery? (n=233)
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

Q. You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past week? (n=159)
### Companies Consider Resuming Travel

#### Are Companies Planning to Resume Travel to…?

<table>
<thead>
<tr>
<th>Region</th>
<th>Do not plan to resume travel in near future</th>
<th>Have considered resuming travel in near future, but no definite plans</th>
<th>Plan to resume travel in near future (1-3 months)</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>39%</td>
<td>34%</td>
<td>9%</td>
<td>18%</td>
</tr>
<tr>
<td>Latin America</td>
<td>36%</td>
<td>34%</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Other Asia Pacific countries</td>
<td>35%</td>
<td>35%</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>Middle East</td>
<td>34%</td>
<td>34%</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>All international</td>
<td>34%</td>
<td>39%</td>
<td>9%</td>
<td>18%</td>
</tr>
<tr>
<td>Canada</td>
<td>30%</td>
<td>36%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Europe</td>
<td>29%</td>
<td>38%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>United States</td>
<td>27%</td>
<td>42%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>Domestic</td>
<td>20%</td>
<td>40%</td>
<td>26%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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)

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Does Return to Work = Return to Travel?

- Yes: 63%
- No: 22%
- Don’t Know: 15%
Canada
Business Travel Halted in Canada

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

- **45%** Canceled / Suspended All Trips
- **36%** Canceled / Suspended Most Trips
- **12%** Canceled / Suspended Some Trips
- **6%** Canceled / Suspended Few Trips
- **0%** Canceled / Suspended No Trips

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?

45%
Our number of business trips will not recover to their pre-pandemic level within the next three years

36%
Our number of business trips will return to their pre-pandemic level within the next three years – but might not exceed it

0%
Our number of business trips will exceed their pre-pandemic level within the next three years

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?

- 36%: My company has begun but we are in the initial stages (ex., collecting stakeholder insights)
- 29%: My company is well underway (ex., building policies and procedures)
- 24%: My company has not started yet
- 12%: Fully established (the recovery plan has been developed and implemented)

Q. How would you characterise your company’s travel recovery plan? (n=42)
What’s the Timeline?

Will travel resume within…?

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

Domestic travel:
- 38% 2-3 months
- 29% 6-8 months
- 12% 12 months or longer
- 21% Unsure

International travel:
- 10% 2-3 months
- 27% 6-8 months
- 23% 12 months or longer
- 40% 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

Q. Is your company planning to provide or require your travelers to have personal protective equipment (PPE) or travel kits as an essential item for their safe return to travel? (n=42)

- 36% Yes, the company will provide it to travellers
- 33% Yes, the individual traveller is required to provide their own
- 14% No, we are not requiring or providing PPE for our travellers
- 14% Not yet determined
- 2% 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

35.1 Million
Business Trips

31.8 Million
Domestic Trips

3.3 Million
International Trips

23%
Group

77%
Transient

$35.8 BILLION
2016 Total Expenditures

$35.8 BILLION Economic Flows

$40.1 BILLION
Economic Impact (GDP)

$573,000
Jobs Supported

Source: GBTA, Rockport Analytics

IMPACT ON CANADIAN BUSINESS

$18 BILLION
Direct Impacts

$10.2 BILLION
Indirect (Supply Chain)

$11.9 BILLION
Induced (Income)

Industries directly providing goods and services to business travelers (e.g., hotels, restaurants)

Industries providing goods & services to front-line businesses (e.g., food distribution)

Direct & Indirect incomes spent at an array of Canadian businesses (e.g., Health Care)
Canadian Economic Outlook

Unprecedented Declines in Economic Growth

Canadian 2020 GDP Forecast @ -8.4%

Canadian 2021 GDP Forecast @ +4.9%

Debt Levels Will Hinder the Pace of Economic Recovery

Source: IMF

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

- 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.

BTI™ Outlook For Canadian Business Travel Spending

2019 @ $26B USD

Source: GBTA, Rockport Analytics

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Thank You
Canadian Travel & Tourism Roundtable

Randi Rahamim
Managing Director
Teneo
Randi.Rahamim@Teneo.com
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

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

Connecting the people that connect the world.™
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

<table>
<thead>
<tr>
<th>Travel Sectors</th>
<th>Reference Site/Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>International Air Transport Association (IATA)</strong></td>
<td></td>
</tr>
<tr>
<td><em>5 Principles to Re-Start Travel</em></td>
<td><a href="https://www.gbta.org/Portals/0/Documents/canada/IATA-FivePrinciplesForRestartingAviation.pdf">https://www.gbta.org/Portals/0/Documents/canada/IATA-FivePrinciplesForRestartingAviation.pdf</a></td>
</tr>
<tr>
<td><strong>International Civil Aviation Association (ICAO)</strong></td>
<td></td>
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<tr>
<td><strong>Airlines for America (AAA)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Fly Smart Program</strong></td>
<td><a href="https://www.airlinestakeaction.com/">https://www.airlinestakeaction.com/</a></td>
</tr>
<tr>
<td><strong>Hotel Association of Canada</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Stay Safe Program</strong></td>
<td>[<a href="https://www.hac">https://www.hac</a> safestay.com/](<a href="https://www.hac">https://www.hac</a> safestay.com/)</td>
</tr>
</tbody>
</table>
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.
GBTA is here to support you with Career and Personal Development.
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, BWHIHotel Group
- Tom Nealon, Southwest Airlines

View All Multimedia >>
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) 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
Thank You for Being a Part of OUR Global Business Travel Association