Methodology

An online flash poll was conducted of GBTA members and non-members worldwide, including corporate travel managers and travel suppliers

- Fielding took place from August 5 through August 8, 2020
- An email invitation was sent to 16,289 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA’s Daily News Brief sent to travel professionals worldwide
- In total, 827 companies responded to the poll
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number
Key Highlights
With an Effective Vaccine or Public Health Measures, Many Travel Managers Expect Their Company’s Travel Volume Will Fully Recover Within 3 Years

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

- **39%** Our number of business trips will not recover to their pre-pandemic level within the next three years
- **42%** Our number of business trips will return to their pre-pandemic level within the next three years – but might not exceed it
- **4%** Our number of business trips will exceed their pre-pandemic level within the next three years

Note: 14% indicated “not sure”
Companies Are In the Early Stages of Travel Recovery Planning

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

- My company has not started yet: 12%
- My company has begun but we are in the initial stages (ex., collecting stakeholder insights): 34%
- My company is well underway (ex., building policies and procedures): 26%
- Fully established (the recovery plan has been developed and implemented): 28%

Q. How would you characterize your company’s travel recovery plan? (n=609)
Almost One-Third of Companies Will Provide Travelers With PPE

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=616)

- Yes, the company will provide it to travelers: 31%
- Yes, the individual traveler is required to provide their own: 30%
- No, we are not requiring or providing PPE for our travelers: 13%
- Not yet determined: 6%
- Don't know: 20%
Has the Worst Already Happened? Travel Professionals Are Split

Q. When thinking about the following, which best describes your view? (n=612-617)

- Cancelled flights: 72% The worst has already happened, 14% The worst has yet to come, 15% Not sure
- Hotels suspending operations: 62% The worst has already happened, 24% The worst has yet to come, 14% Not sure
- Revenue loss for travel companies: 37% The worst has already happened, 43% The worst has yet to come, 20% Not sure
- Layoffs/furloughs in the corporate travel industry: 36% The worst has already happened, 46% The worst has yet to come, 19% Not sure
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
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.
### Business Travel Still Grounded…

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>96%</td>
<td>of companies have canceled or suspended most (26%) or all (71%) trips to China</td>
</tr>
<tr>
<td>APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)</td>
<td>94%</td>
<td>of companies have canceled or suspended most (28%) or all (66%) trips to other APAC countries</td>
</tr>
<tr>
<td>Latin America</td>
<td>93%</td>
<td>of companies have canceled or suspended most (25%) or all (68%) trips to Latin America</td>
</tr>
<tr>
<td>European countries</td>
<td>90%</td>
<td>of companies have canceled or suspended most (35%) or all (55%) trips to European countries</td>
</tr>
<tr>
<td>United States</td>
<td>83%</td>
<td>of companies have canceled or suspended most (41%) or all (41%) trips to the United States</td>
</tr>
<tr>
<td>Canada</td>
<td>88%</td>
<td>of companies have canceled or suspended most (31%) or all (57%) trips to Canada</td>
</tr>
<tr>
<td>Other countries</td>
<td>93%</td>
<td>of companies have canceled or suspended most (37%) or all (56%) international trips</td>
</tr>
<tr>
<td>United States</td>
<td>74%</td>
<td>of companies have canceled or suspended most (47%) or all (27%) domestic travel within their own country</td>
</tr>
</tbody>
</table>

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

Are Companies Planning to Resume Travel to…?

- Do not plan to resume travel in near future
- Have considered resuming travel in near future, but no definite plans
- Plan to resume travel in near future (1-3 months)
- Not sure

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)
What’s the Timeline?

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=500-512)
Will the Coronavirus Prompt Stricter Policies About Booking?

As a result of the pandemic, are companies more or less likely to…?

- Allow travelers to book directly with suppliers: 66% Less likely than before the pandemic, 47% More likely than before the pandemic, 2% Neither more nor less likely, 8% Not sure.
- Allow travelers to book “restricted” airfares or hotel rates (e.g., basic economy or “light” airfares; nonrefundable hotel rates): 40% Less likely than before the pandemic, 45% More likely than before the pandemic, 5% Neither more nor less likely, 16% Not sure.
- Adopt off-channel booking capture technology (e.g., SAP Concur TripLink, Traxo, CapTrav): 25% Less likely than before the pandemic, 45% More likely than before the pandemic, 14% Neither more nor less likely, 16% Not sure.
- Include dynamic rates in our hotel program: 9% Less likely than before the pandemic, 42% More likely than before the pandemic, 33% Neither more nor less likely, 17% Not sure.

Q. As a result of the pandemic, do you think your company is more or less likely to take the following actions? Note: Question only displayed to travel buyers/procurement professionals (n=348-349)