

# Coronavirus Recovery Poll Results

July 19, 2021

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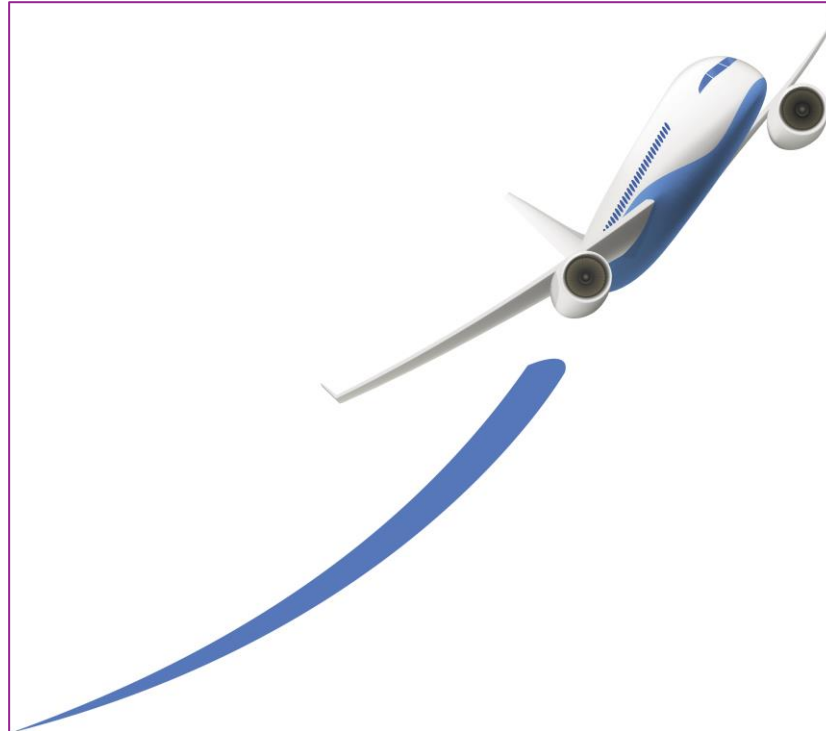


# Methodology

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

- Fielding took place from July 6 through July 13, 2021
- An email invitation was sent to 16,037 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, 618 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

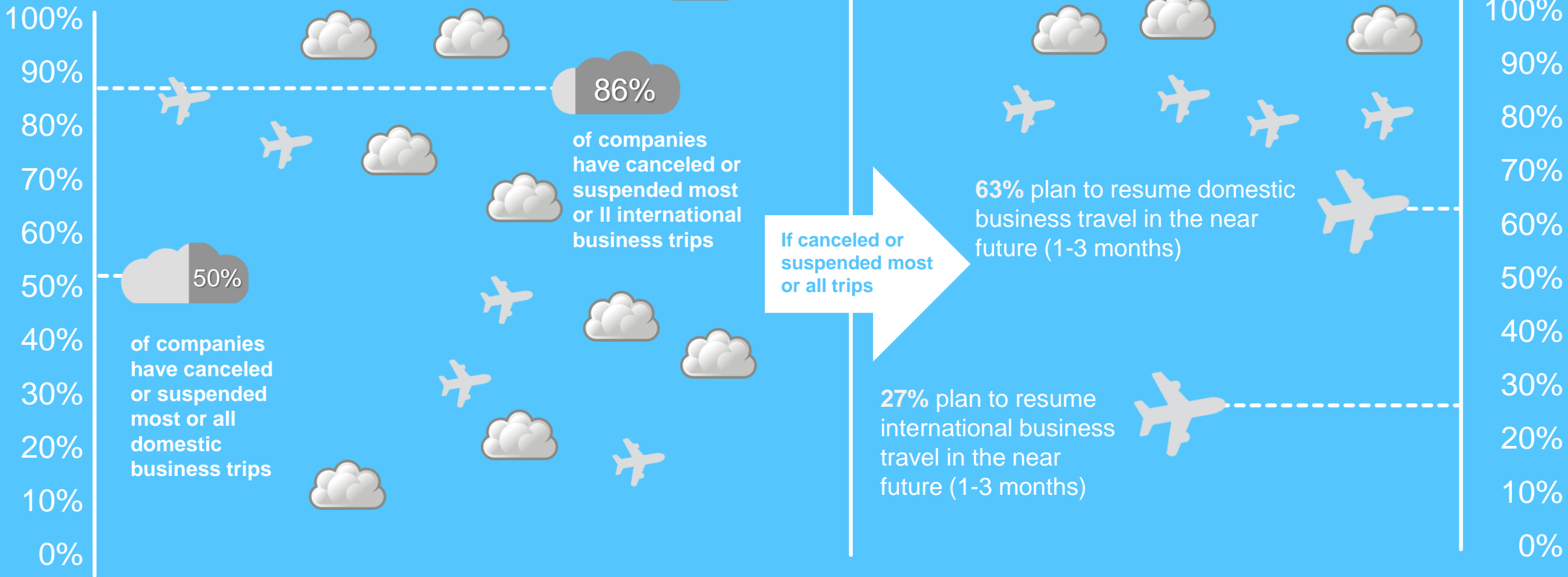
# The State of Business Travel





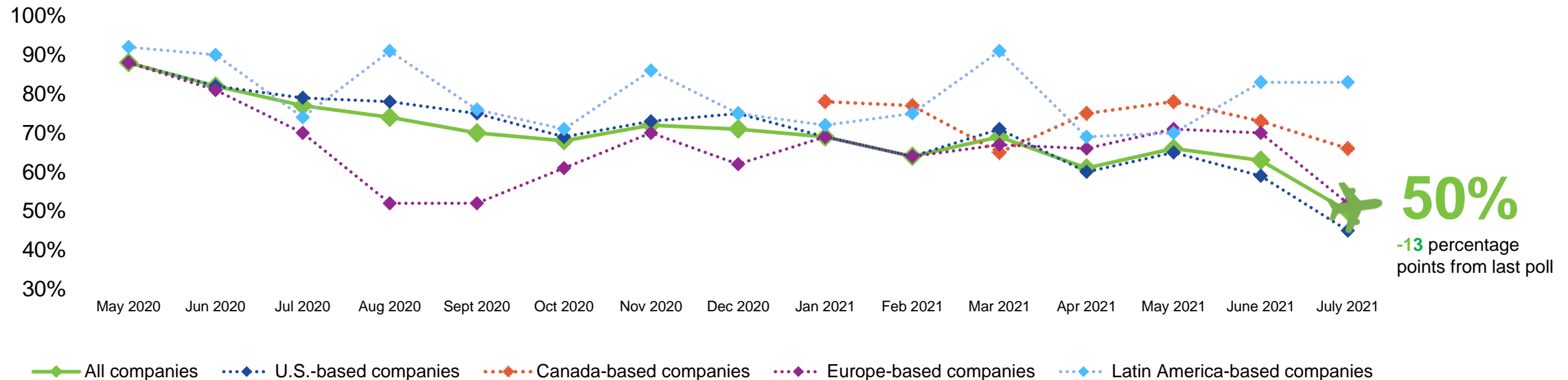
# The State of Business Travel

## July 2021



# The State of Domestic Business Travel

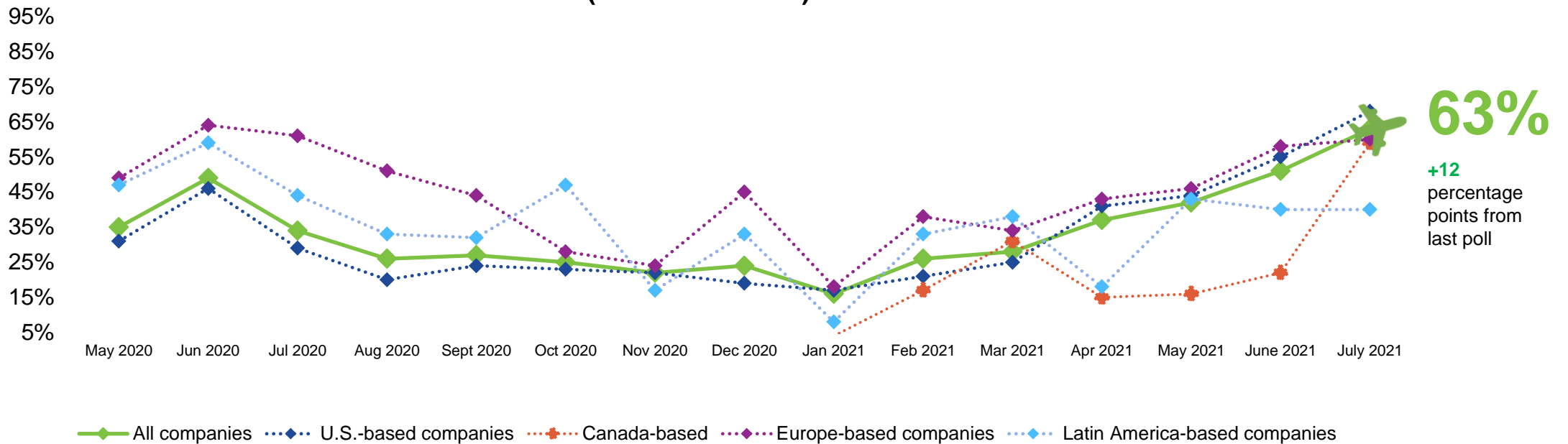
**% of companies that have canceled or suspended most or all domestic business travel within their country**



Note: Small sample size for Latin America-based respondents in recent polls (n<30)

# The State of Domestic Business Travel (Cont.)

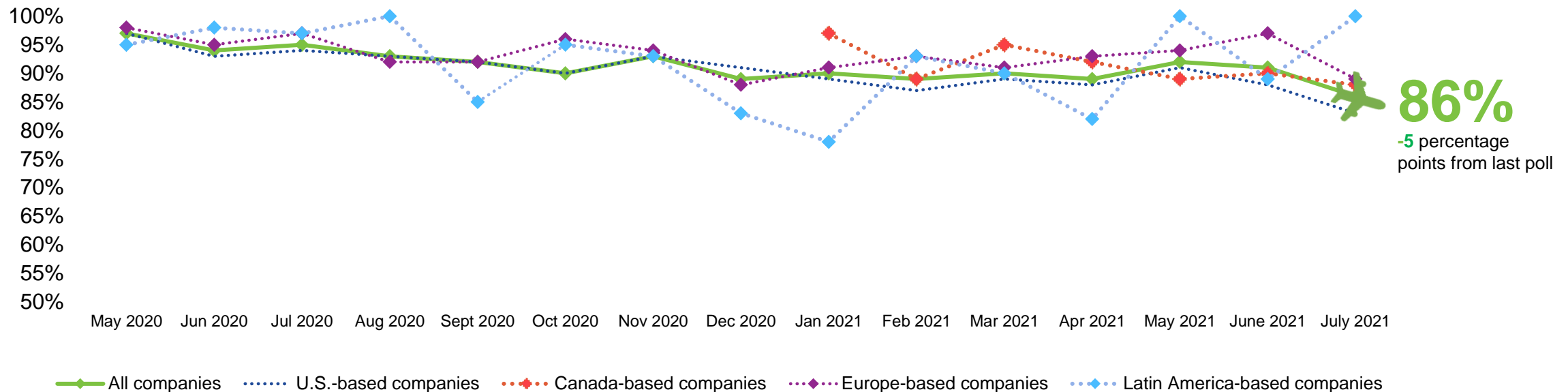
**% of companies that plan to resume domestic business travel in the near future (next 1-3 months)\***



\*figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country  
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)

# The State of International Business Travel

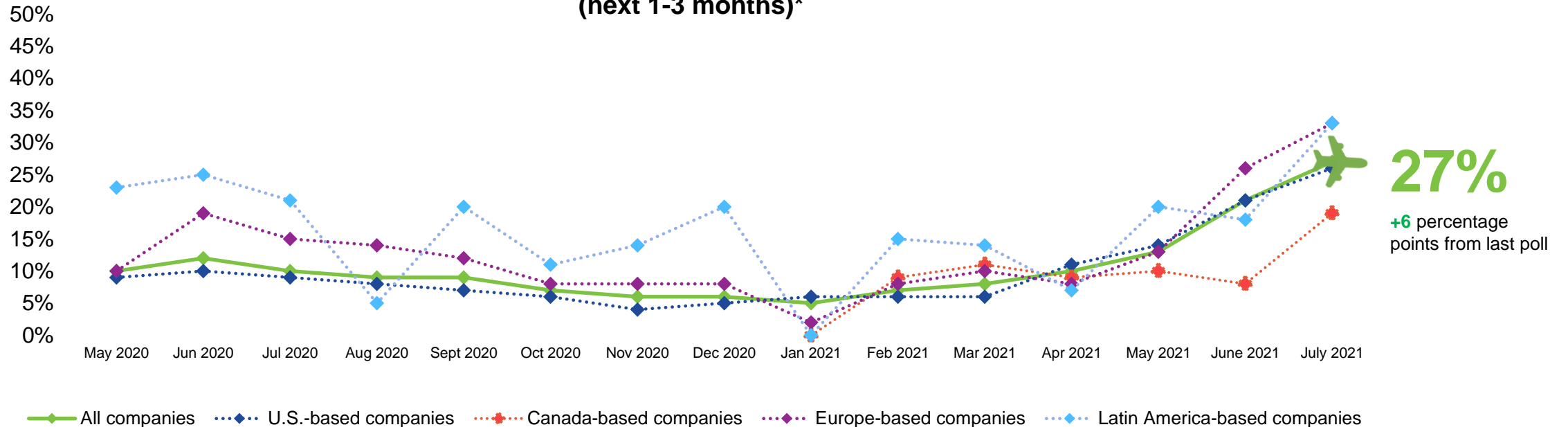
% of companies that have canceled or suspended most or all international business travel



Note: Small sample size for Latin America-based respondents in recent polls (n<30)

# The State of International Business Travel (Cont.)

**% of companies that plan to resume international business travel in the near future (next 1-3 months)\***



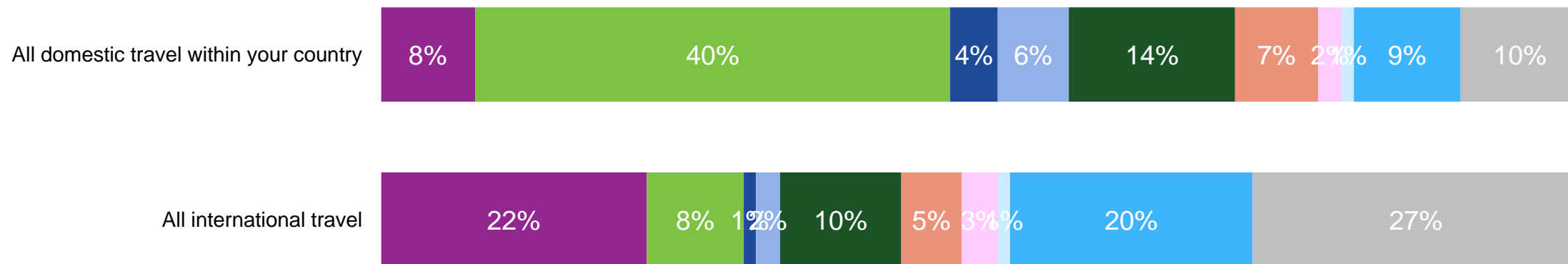
\*figures are among those that indicated their company has canceled or suspended most or all international business trips  
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)



# What's the Specific Timeline?

## When do companies specifically plan to resume business travel?

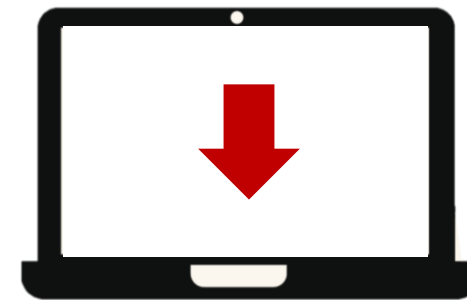
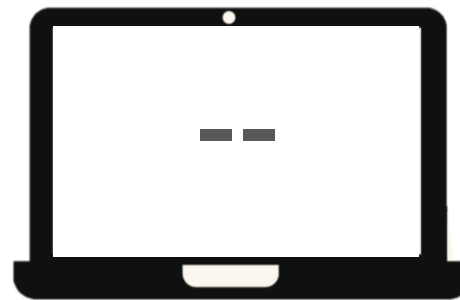
■ Not yet decided 
 ■ Already resumed 
 ■ July 2021 
 ■ August 2021 
 ■ September 2021 
 ■ October 2021 
 ■ November 2021 
 ■ December 2021 
 ■ 2022 
 ■ Not sure



Q. When does your company expect to resume the following types of business trips specifically? (n=545-546)

# 7 in 10 Suppliers See Future Bookings Increase

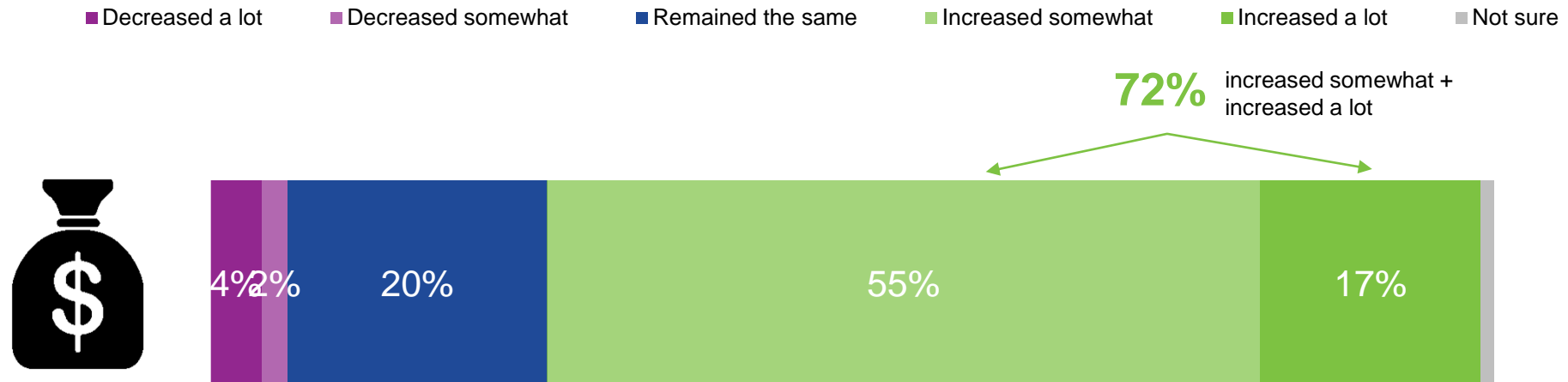
How have bookings from corporate customers changed in the past week?



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

# Almost Three-Quarters of Buyers Say Their Company's Travel Spend Increased in June

How did company travel spend change in June?

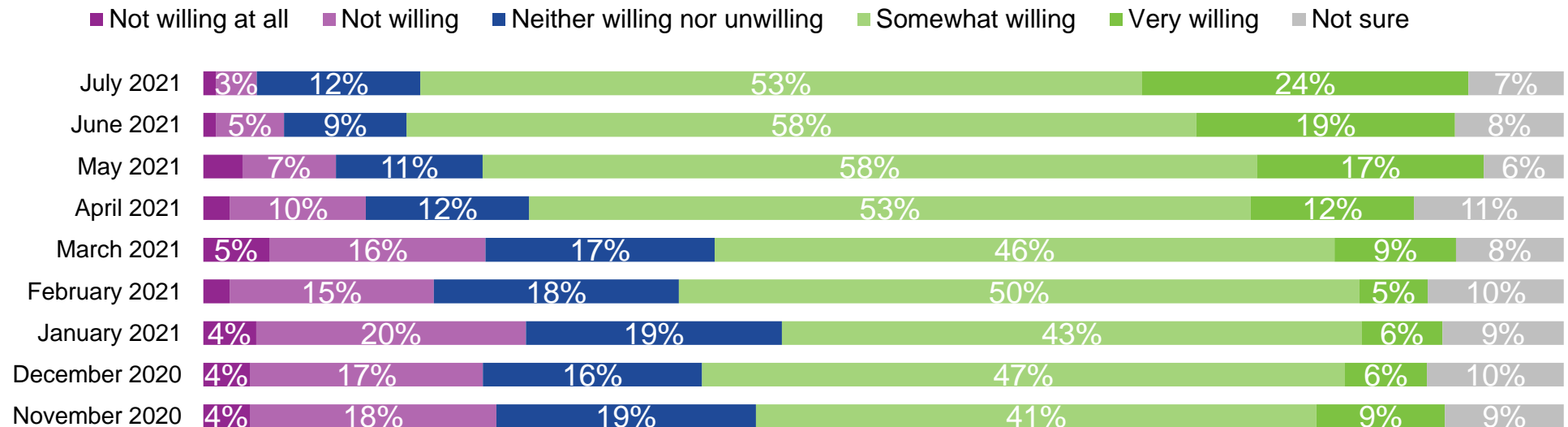


Q. How did your company's travel spend change in May, 2021, compared to the prior month?

**Note: Question only displayed to travel buyers/procurement professionals (n=309)**

# Are Employees Willing to Travel for Work?

Do Travel Managers think their company's employees are willing to travel?

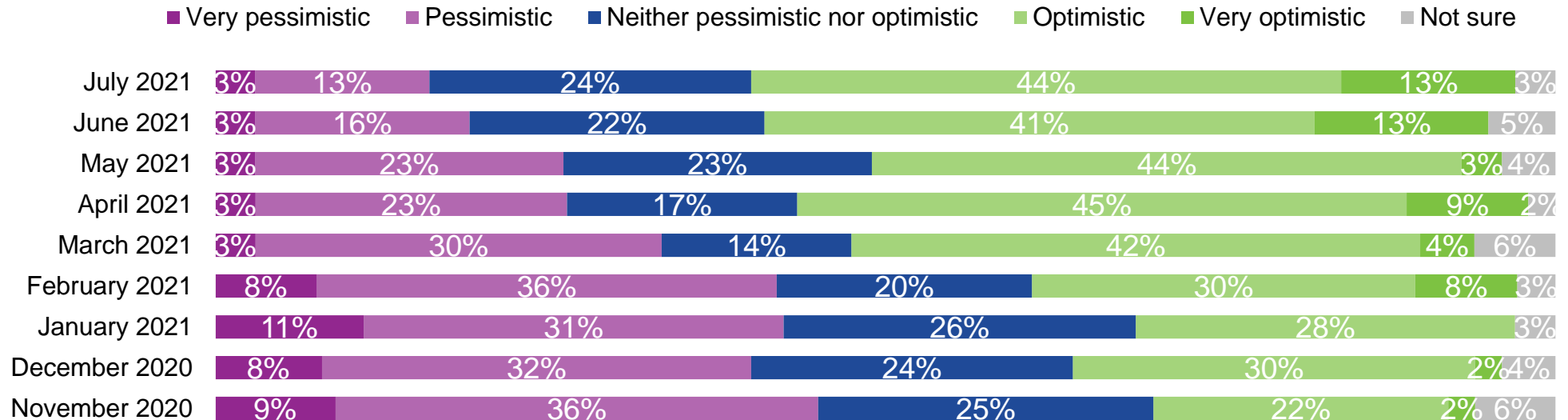


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=290-448)

# Supplier Optimism Remains Fairly Flat From Last Month

Are suppliers optimistic about the financial prospects of companies in the business travel sector?



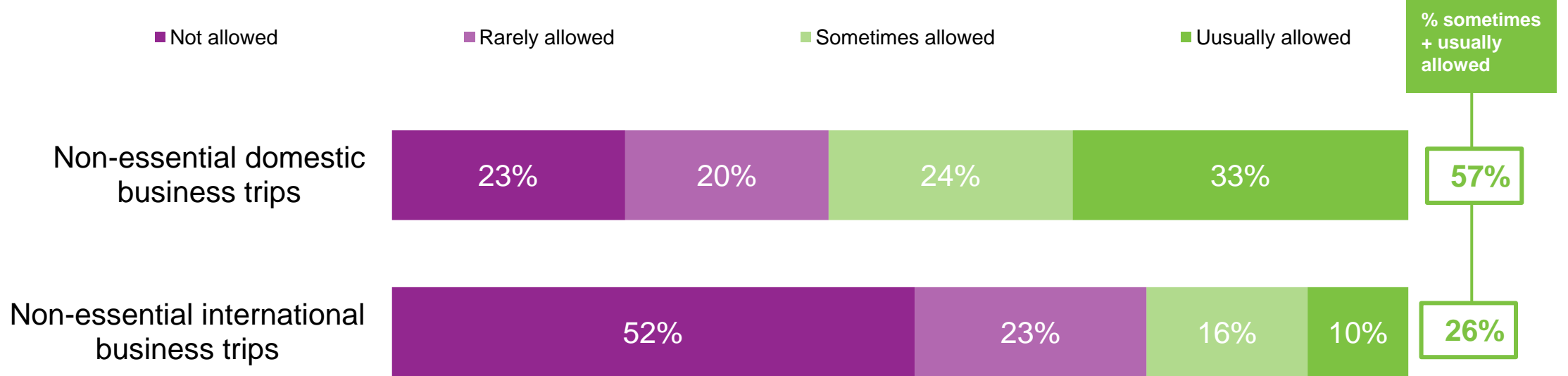
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=188-332)**

# Key Highlights



# Most Companies Have Resumed at Least Some Non-Essential Business Trips

Company's current position on employees traveling for business

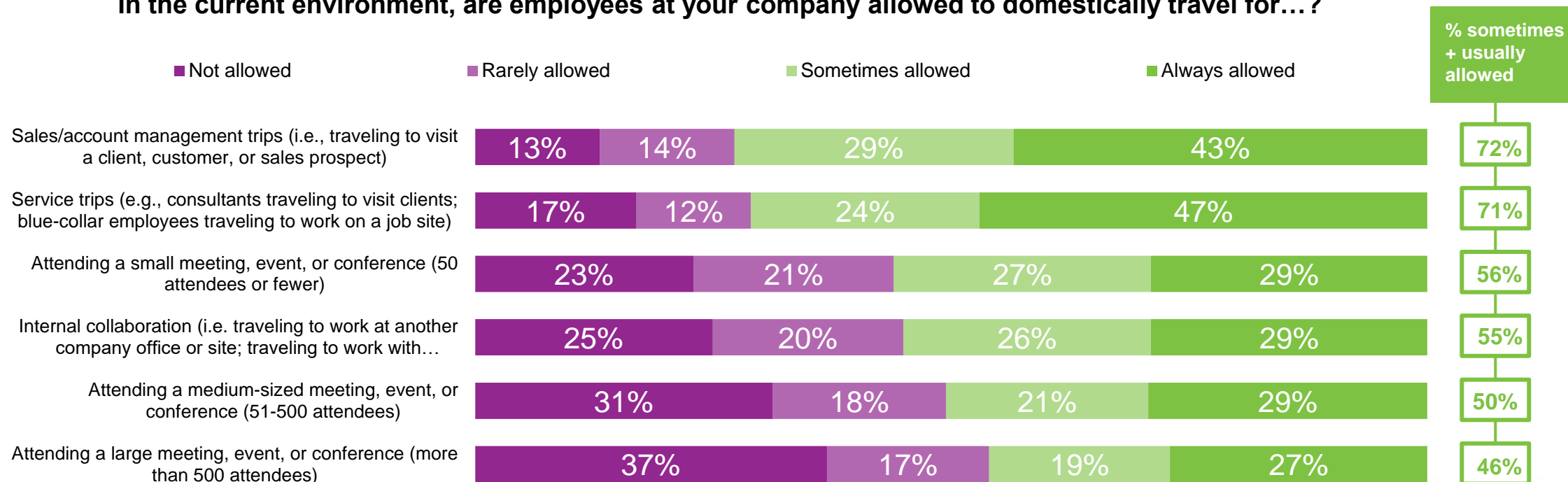


Q. Which of the following best describes your company's current position on employees traveling for business? (n=534-566)

Note: Some respondents indicated "Not applicable/Not sure." These responses were excluded from calculations.

# Which Types of Domestic Trips Are Allowed?

In the current environment, are employees at your company allowed to domestically travel for...?



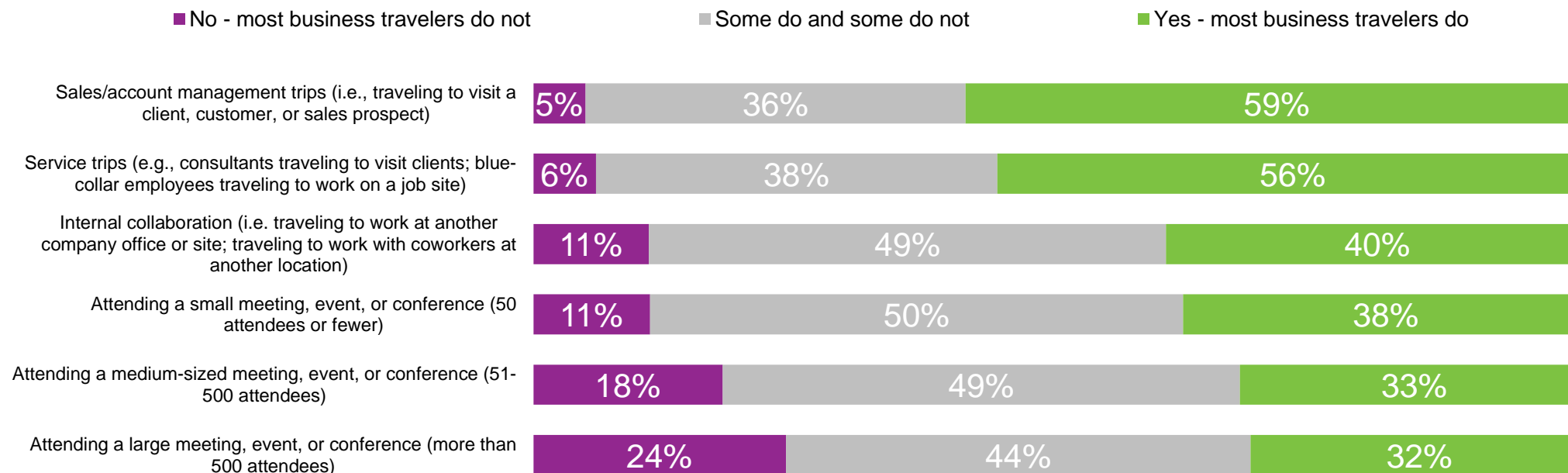
Q. In the current environment, are employees at your company allowed to take non-essential domestic business trips for the following reasons? (n=467-536)

Note: Some respondents indicated "Not applicable/Not sure." These responses were excluded from calculations.



# Do Employees *Want* to Travel for Business?

## Do travel managers think their employees want to travel for...?



Q. To the best of your knowledge, do the business travelers who typically travel for the following reasons at your company want to travel for these reasons currently?

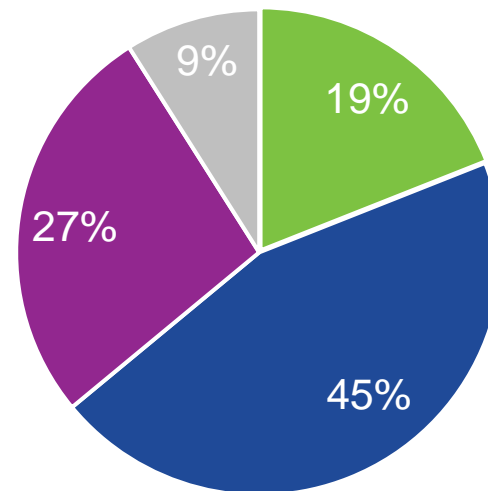
Note: Question only displayed to travel buyers/procurement professionals (n=266-286)

Note: Some respondents indicated "Not applicable/Not sure." These responses were excluded from calculations.

# Offices Reopen – But Companies Continue to Allow Employees to Work From Home



## Current status of company's office reopening plan

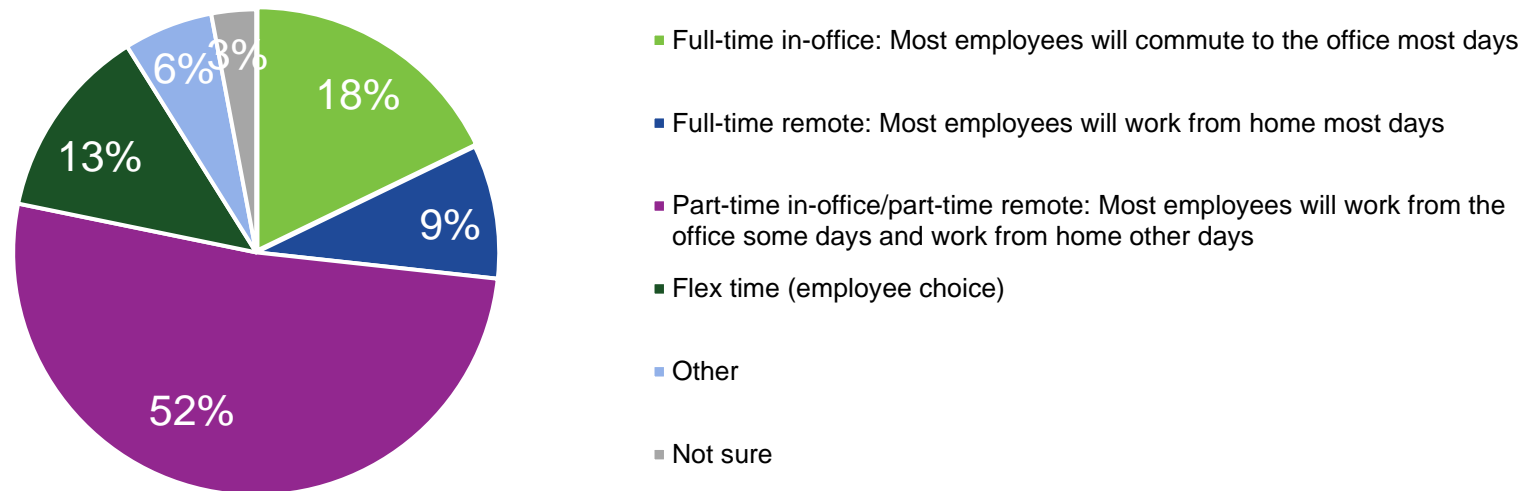


- Our office(s) has re-opened and most employees are required to be in the office: My company's office(s) has re-opened and most or all employees are required to work from the office at least one day per week
- Our office(s) has re-opened but working in the office is optional: My company's office(s) has re-opened and most or all employees currently have the option to work from the office or work from home
- Our office has not yet re-opened: My company's office(s) has not re-opened and most or all employees are expected to work from home
- Other

Q. Which of the following best describes your company's office re-opening status in the country where you are based? (n=600)

## Many Respondents Expect Their Company Will Continue to Allow Flexibility Even After Offices Fully Reopen

When your office fully re-opens, which will most likely apply?



Q. When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply? (n=597)

# International Travel Restrictions Hurt Business Outcomes

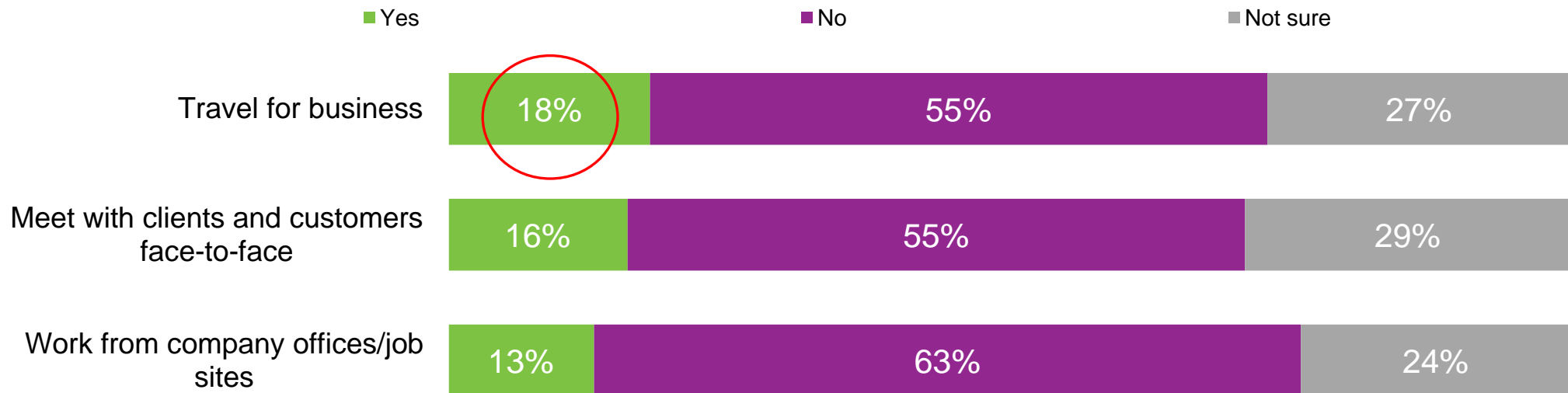
**How does the lack of international business travel due to government policies and restrictions impact your company to do the following?**  
*multiple answers allowed*



Q. How does the lack of international business travel due to government policies and restrictions impact your company to do the following?  
Please select all that apply. (n=584)

# Almost 1 in 5 Respondents Say Their Company Will Require COVID-19 Vaccinations for Business Travel

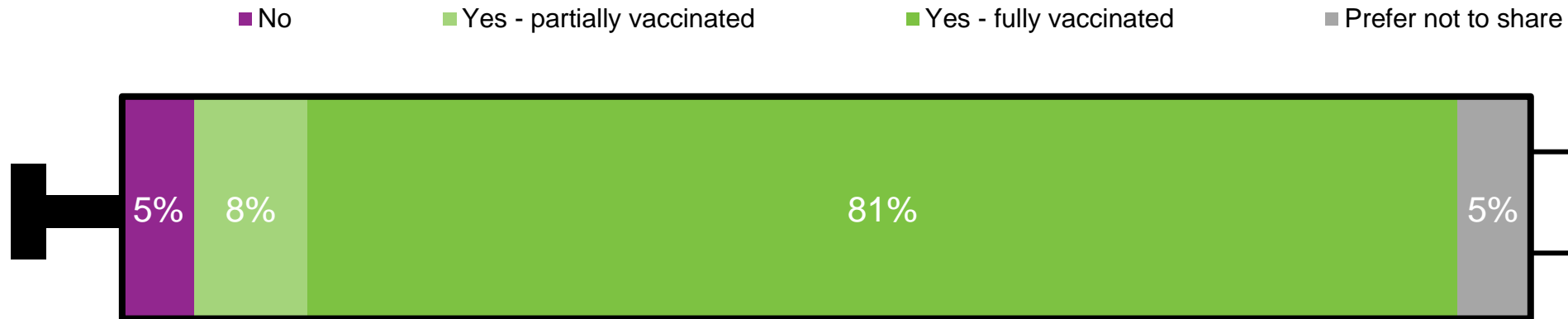
Will your company require employees to receive a COVID-19 vaccine before they can...?



Q. Does (or will) your company require employees to receive a COVID-19 vaccine before they can do the following in the future? (n=585-591)

# A Large Majority of Respondents Have Been Personally Vaccinated

Are you vaccinated against COVID-19?



**The travel industry gets vaccinated**

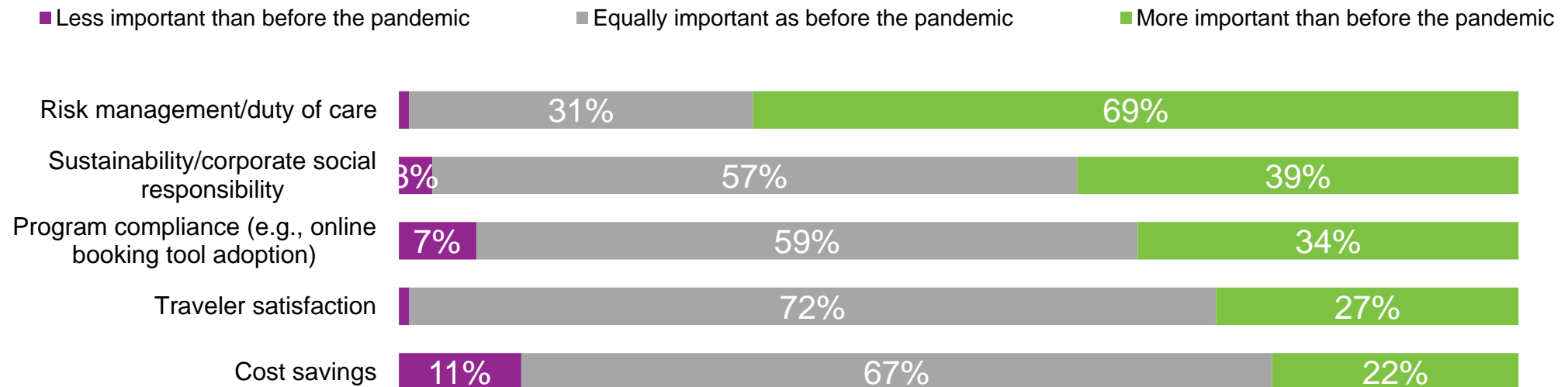
Nine in 10 (88%) travel buyer/ procurement respondents say they have been fully or partially vaccinated. A similar share (92%) of supplier/TMC respondents say they have been fully or partially vaccinated.

**Does this mean it's safe to meet in-person again for client visits and account reviews?**

Q. Are you vaccinated against COVID-19? (n=591)

# For Many Travel Programs, Risk Management and Sustainability Have Become Bigger Priorities

Thinking about your travel program, how important are the following priorities currently?  
*travel managers/procurement professionals only*



Q. Thinking about your travel program, how important are the following priorities currently?  
 Note: Question only displayed to travel buyers/procurement professionals (n=307-309)

# 3 in 5 Companies Plan to Resume Domestic Business Travel in the Near Future

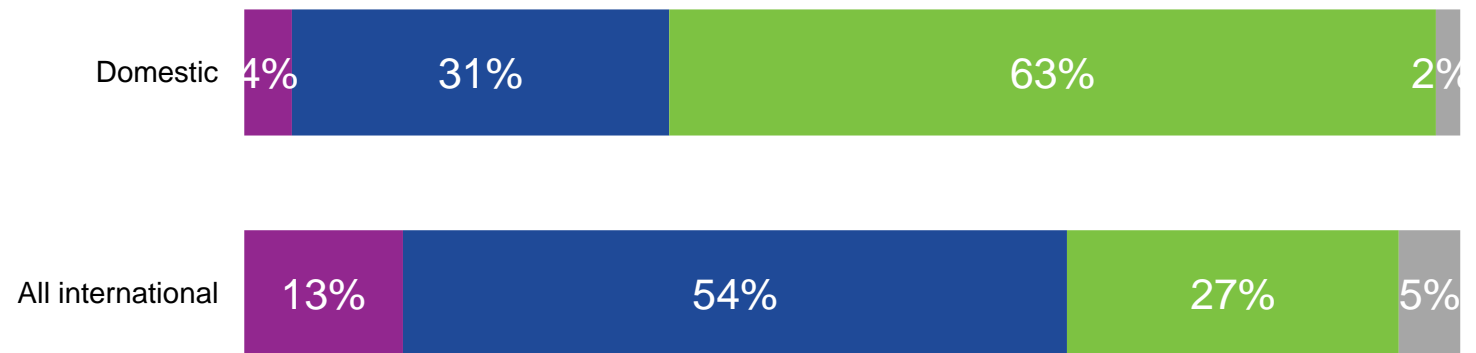
 **86%**  
of companies have canceled or suspended **most** (43%) or **all** (43%) international trips

 **50%**  
of companies have canceled or suspended **most** (38%) or **all** (12%) domestic travel within their own country



## 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=254-418)**

Q. Thinking about your company, how has the coronavirus impacted business travel to... ? (n=500-524)