2022 GBTA Coronavirus Recovery Poll
January 20, 2022

POLL RESULTS

1. Which of the following best describes you?
   - Travel manager / buyer: 43%
   - Procurement/sourcing professional: 8%
   - Supplier: 32%
   - TMC: 10%
   - Other: 8%

2. [If supplier or TMC]: Which of the following best describes the company you work for?
   - Hotel chain: 31%
   - Travel management company: 24%
   - Ground transportation: 9%
   - Individual hotel property: 6%
   - Travel technology: 11%
   - Airline: 10%
   - Meetings management provider: 1%
   - Payment company: 2%
   - Other: 6%
3. Which of the following best describes your company’s current position on employees traveling for business?

<table>
<thead>
<tr>
<th></th>
<th>Not allowed</th>
<th>Rarely allowed</th>
<th>Sometimes allowed</th>
<th>Usually allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-essential domestic business trips</td>
<td>19%</td>
<td>15%</td>
<td>28%</td>
<td>38%</td>
</tr>
<tr>
<td>Non-essential international business trips</td>
<td>37%</td>
<td>22%</td>
<td>23%</td>
<td>18%</td>
</tr>
</tbody>
</table>

4. [DISPLAY IF = BUYER/PROCUREMENT] Thinking about the volume of business travel at your company, which of the following best describes your expectations for this year (2022)?

- It will be much higher than it was in 2021: 17%
- It will be somewhat higher than it was in 2021: 58%
- It will be about the same as it was in 2021: 12%
- It will be somewhat lower than it was in 2021: 2%
- It will be much lower than it was in 2021: 3%
- Not sure: 8%

5. [DISPLAY IF = SUPPLIER/TMC] Thinking about your company’s revenue from business travel, which of the following best describes your expectations for this year (2022)?

- It will be much higher than it was in 2021: 25%
- It will be somewhat higher than it was in 2021: 51%
- It will be about the same as it was in 2021: 13%
- It will be somewhat lower than it was in 2021: 4%
- It will be much lower than it was in 2021: 1%
- Not sure: 5%

6. How do you feel about traveling for business currently?

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>Travel Managers</th>
<th>TMC/Suppliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would definitely do it</td>
<td>38%</td>
<td>31%</td>
<td>47%</td>
</tr>
<tr>
<td>I would probably do it</td>
<td>34%</td>
<td>38%</td>
<td>29%</td>
</tr>
<tr>
<td>I would probably not do it</td>
<td>23%</td>
<td>26%</td>
<td>18%</td>
</tr>
<tr>
<td>I would definitely not do it</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>
7. Thinking about the Omicron variant and its impact on business travel specifically, which of the following best describes your view?

- I am more worried about the Omicron variant than I was about the Delta variant: 13%
- I am equally worried about the Omicron variant as I was about the Delta variant: 45%
- I am less worried about the Omicron variant than I was about the Delta variant: 43%

8. Specifically, as a result of the Omicron variant, has your company introduced new restrictions on non-essential business travel or new requirements related to business travel as a whole?

- Yes - we have introduced new restrictions or requirements: 27%
- No - but we are considering introducing new restrictions or requirements: 15%
- No - we are unlikely to introduce new restrictions or requirements: 52%
- Not sure: 6%

9. [DISPLAY IF = SUPPLIER/TMC] You indicated you work for a travel supplier or TMC. To what extent do you believe the Omicron variant/other variants and the growing number of coronavirus cases in many countries will impact your revenue from business travel?

- It will have no impact at all: 3%
- It will have a slightly negative impact: 20%
- It will have a moderately negative impact: 38%
- It will have a very negative impact: 32%
- Not sure: 6%

10. In the current environment, what do you view as the single greatest barrier to business travel? Please select one.

- Government policies that restrict travel or make it difficult (e.g., entry restrictions or mandatory quarantines): 43%
- Company policies restricting employees from traveling: 24%
- Employee unwillingness/reluctance to travel: 9%
- Offices aren't fully open: 9%
- Travel budget freeze/ cost savings: 6%
- Other: 6%
- Not sure: 2%
11. Which of the following do you view as barriers to international business travel? Please select all that apply.

- Policy uncertainty: Policies frequently change; a traveler can book a trip to a foreign country today but face new requirements: 72%
- Strict requirements: Policies impose strict requirements on international visitors (e.g., mandatory quarantines or testing: 69%
- Policy inconsistency: Different countries have different policies and requirements for international visitors: 64%
- Bureaucratic requirements: Policies require travelers to fill out forms, provide documentation, and complete paperwork: 45%
- Lack of portable test kits: 23%
- Other: 8%

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

- Very willing: 15%
- Somewhat willing: 49%
- Neither willing nor unwilling: 17%
- Not willing: 10%
- Not willing at all: 1%
- Not sure: 8%

13. 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

<table>
<thead>
<tr>
<th></th>
<th>Cancelled All Trips</th>
<th>Cancelled Most Trips</th>
<th>Cancelled Some Trips</th>
<th>Cancelled a Few Trips</th>
<th>Cancelled No Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>All International</td>
<td>18%</td>
<td>50%</td>
<td>19%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>All Domestic Travel</td>
<td>5%</td>
<td>24%</td>
<td>34%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>All Travel (Domestic and International)</td>
<td>5%</td>
<td>33%</td>
<td>38%</td>
<td>17%</td>
<td>7%</td>
</tr>
</tbody>
</table>
14. 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?

<table>
<thead>
<tr>
<th>Region/Country</th>
<th>Plan to Resume Travel in Near Future (1-3 months)</th>
<th>Considering Resuming Travel in Near Future, but No Definite Plans</th>
<th>Do Not Plan to Resume Travel in Near Future</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>All International Travel</td>
<td>24%</td>
<td>54%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>All Domestic Travel</td>
<td>35%</td>
<td>48%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>All Travel</td>
<td>30%</td>
<td>52%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

- Very optimistic: 8%
- Optimistic: 46%
- Neither optimistic nor pessimistic: 28%
- Pessimistic: 17%
- Very pessimistic: 1%

16. [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: 21%
- Our bookings have remained the same: 19%
- Our bookings have decreased: 60%