

2022 GBTA Coronavirus Recovery Poll January 20, 2022



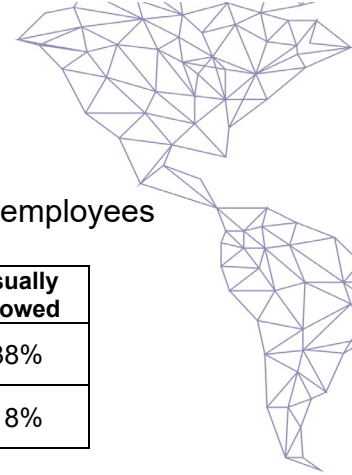
POLL RESULTS

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?

	Not allowed	Rarely allowed	Sometimes allowed	Usually allowed
Non-essential domestic business trips	19%	15%	28%	38%
Non-essential international business trips	37%	22%	23%	18%

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%

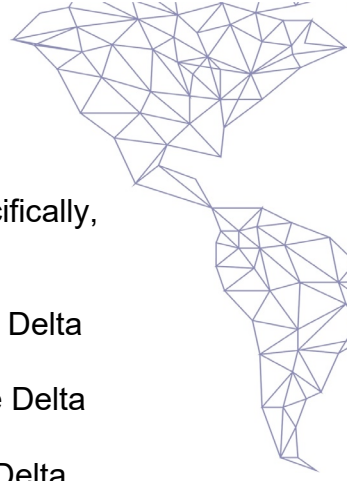
5. [DISPLAY IF = SUPPLIER/TMC] Thinking about your company's revenue from business travel, which of the following best describes your expectations for this year (2022)?

- 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?

	All	Travel Managers	TMC/Suppliers
I would definitely do it	38%	31%	47%
I would probably do it	34%	38%	29%
I would probably not do it	23%	26%	18%
I would definitely not do it	5%	6%	5%





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%

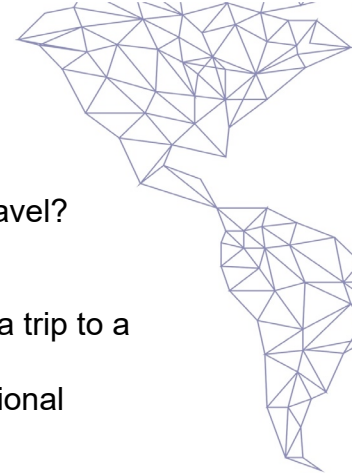
9. [DISPLAY IF = SUPPLIER/TMC] You indicated you work for a travel supplier or TMC. To what extent do you believe the Omicron variant/other variants and the growing number of coronavirus cases in many countries will impact your revenue from business travel?

- 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%

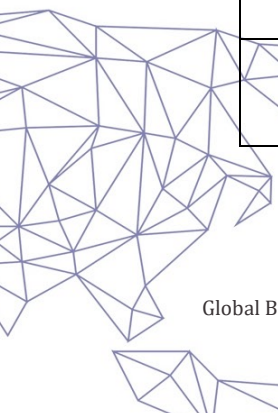
12. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company’s employees, please rate their willingness to travel for business in the current environment.

- 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

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
All International	18%	50%	19%	8%	5%
All Domestic Travel	5%	24%	34%	18%	19%
All Travel (Domestic and International)	5%	33%	38%	17%	7%





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?

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	24%	54%	14%	9%
All Domestic Travel	35%	48%	10%	7%
All Travel	30%	52%	9%	9%

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%

