

2022 GBTA Coronavirus Recovery Poll February 28, 2022



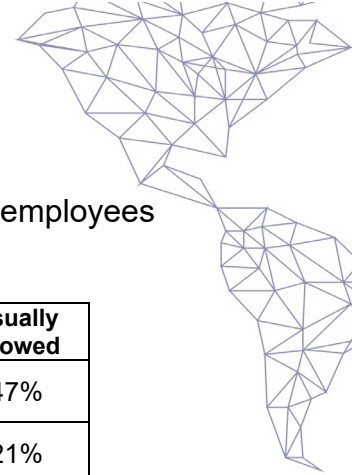
POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 48%
- Procurement/sourcing professional: 9%
- Supplier: 31%
- TMC: 6%
- Other: 5%

2. [If supplier or TMC]: Which of the following best describes the company you work for?

- Hotel chain: 38%
- Travel management company: 17%
- Ground transportation: 8%
- Individual hotel property: 5%
- Travel technology: 13%
- Airline: 8%
- Meetings management provider: 2%
- Payment company: 3%
- Other: 14%



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	12%	16%	26%	47%
Non-essential international business trips	29%	24%	27%	21%

4. Thinking about the Omicron variant, which of the following best describes your near-term expectations for business travel over the next three months?

- The worst of the Omicron variant is behind us, and business travel will quickly pick up in the next three months: 29%
- The worst of the Omicron variant is behind us - but business travel will pick up slowly in the next three months: 50%
- The Omicron variant will continue to weigh on business travel recovery in the next three months: 17%
- Not sure: 5%

5. [DISPLAY IF = BUYER/PROCUREMENT] Thinking about your company's current business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

- Less than 10% of our pre-pandemic bookings: 16%
- 11-20% of our pre-pandemic bookings: 19%
- 21-30% of our pre-pandemic bookings: 18%
- 31-40% of our pre-pandemic bookings: 13%
- 41-50% of our pre-pandemic bookings: 11%
- 51-60% of our pre-pandemic bookings: 7%
- 61-70% of our pre-pandemic bookings: 7%
- 71-80% of our pre-pandemic bookings: 4%
- 81-90% of our pre-pandemic bookings: 1%
- 91-100% of our pre-pandemic bookings: 1%
- We have exceeded our pre-pandemic bookings: 3%
- Not sure: 2%

- Mean: 33.3%
- Median: 23.9%





6. [DISPLAY IF = SUPPLIER/TMC] Thinking about your company's current bookings from business travel, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

- Less than 10% of our pre-pandemic bookings: 8%
 - 11-20% of our pre-pandemic bookings: 14%
 - 21-30% of our pre-pandemic bookings: 14%
 - 31-40% of our pre-pandemic bookings: 11%
 - 41-50% of our pre-pandemic bookings: 9%
 - 51-60% of our pre-pandemic bookings: 7%
 - 61-70% of our pre-pandemic bookings: 10%
 - 71-80% of our pre-pandemic bookings: 7%
 - 81-90% of our pre-pandemic bookings: 6%
 - 91-100% of our pre-pandemic bookings: 1%
 - We have exceeded our pre-pandemic bookings: 2%
 - Not sure: 10%
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- Mean: 41.9%
 - Median: 35.0%

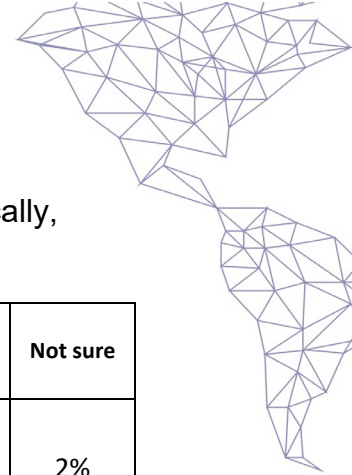
7. How much would you prefer to travel for business in the future?

- Much more than I did before the pandemic: 6%
- Somewhat more than I did before the pandemic: 7%
- The same amount as I did before the pandemic: 55%
- Somewhat less than I did before the pandemic: 22%
- Much less than I did before the pandemic: 8%
- Not sure: 2%

8. [DISPLAY IF =BUYER/PROCUREMENT] Compared to before the pandemic, do you think employees at your company are more or less interested in extending work trips for leisure (i.e., taking "bleisure" trips)?

- Much more interested than before the pandemic: 5%
- More interested than before the pandemic: 24%
- Equally interested as before the pandemic: 53%
- Less interested than before the pandemic: 14%
- Much less interested than before the pandemic: 4%





9. [DISPLAY IF Q2=SUPPLIER/TMC] Thinking about your company specifically, please rate your agreement with the following statements:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not sure
It is difficult to hire qualified employees in the current environment	3%	15%	12%	43%	25%	2%
It is difficult to retain qualified employees in the current environment	3%	19%	18%	39%	19%	1%
We need to offer additional pay or incentives to hire or retain qualified employees in the current environment	5%	8%	17%	44%	23%	4%

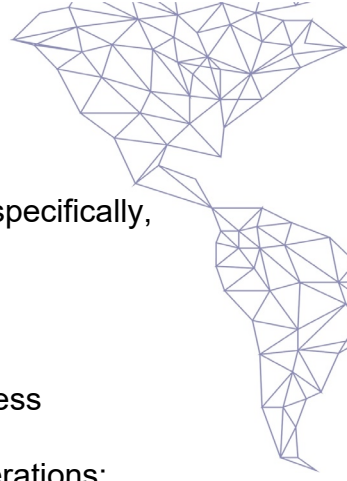
10. [DISPLAY IF = SUPPLIER/TMC] Thinking about your company, which of the following best describes the employee base currently? Note: If your company acquired another company – or was acquired – during the pandemic, please do not include the employees from the acquired company.

- Much smaller than it was before the pandemic: 10%
- Somewhat smaller than it was before the pandemic: 27%
- The same size as it was before the pandemic: 37%
- Somewhat larger than it was before the pandemic: 19%
- Much larger than before the pandemic: 4%
- Not sure: 3%

11. [DISPLAY IF = BUYER/PROCUREMENT] During the pandemic, countries have restricted foreign visitors from entering their borders. Thinking about your company specifically, which of the following best describes your view?

- Government travel restrictions have greatly hurt business outcomes: 27%
- Government travel restrictions have somewhat hurt business outcomes: 42%
- Government travel restrictions have not hurt business outcomes: 31%





12. [DISPLAY IF = BUYER/PROCUREMENT] Thinking about your company specifically, which of the following best describes your view?

- Government travel restrictions have greatly disrupted our business operations: 23%
- Government travel restrictions have somewhat disrupted our business operations: 56%
- Government travel restrictions have not disrupted our business operations: 21%

13. [DISPLAY IF Q12=SOMEWHAT/GREATLY DISRUPTED] You mentioned travel bans have hurt business operations. After travel bans have been lifted, how long would it take for your company's business operations to return to normal?

- Less than one month: 9%
- 1-2 months: 21%
- 3-4 months: 17%
- 5-6 months: 15%
- 6 months+: 19%
- Not sure: 19%

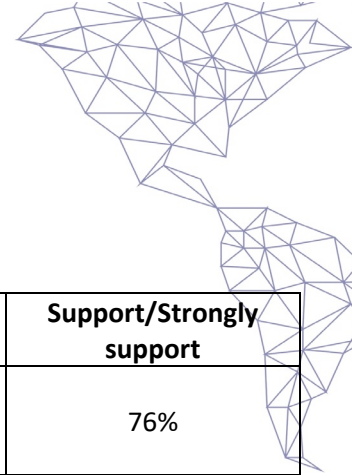
14. When your company fully reopens its office(s), which of the following is most likely to apply?

- Our company will require most employees to report to the office at least some days: 56%
- Our company will prefer that employees report to the office but not require it. However, it might incentivize reporting to the office (e.g., free lunch or other benefits): 15%
- Our company will not care if employees report to the office or work from home: 19%
- Our company will prefer that employees work from home: 6%
- Our company will never fully reopen its office: 5%

15. How would you rate your country's entry requirements for international visitors (non-citizens)?

- Much too strict: 10%
- Too strict: 24%
- Neither willing nor unwilling: 17%
- Just right: 46%
- Too lenient: 6%
- Much too lenient: 2%
- Not sure: 12%





16. How do you feel about the following country-level entry requirements for international visitors (non-citizens)?

	Oppose/Strongly oppose	Neither support nor oppose	Support/Strongly support
International visitors need to provide proof of COVID-19 vaccination in order to enter	13%	10%	76%
International visitors need to take a COVID-19 test prior to departure	24%	19%	57%
International visitors need to quarantine upon arrival	67%	24%	10%
Travel bans restricting international visitors (from all countries or certain countries)	62%	23%	15%

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

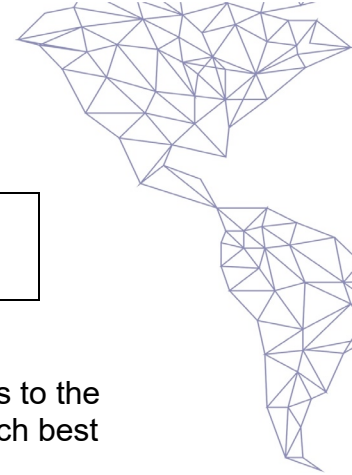
- Very willing: 22%
- Somewhat willing: 60%
- Neither willing nor unwilling: 9%
- Not willing: 5%
- Not willing at all: 0%
- Not sure: 4%

18. 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]

- All international travel
- All domestic travel
- All travel, domestic and international

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
All International	17%	55%	17%	8%	4%
All Domestic Travel	4%	30%	30%	19%	19%





All Travel (Domestic and International)	4%	36%	36%	16%	8%
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19. 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	33%	50%	9%	8%
All Domestic Travel	58%	33%	5%	3%
All Travel	42%	45%	7%	6%

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

- Very optimistic: 16%
- Optimistic: 61%
- Neither optimistic nor pessimistic: 14%
- Pessimistic: 7%
- Very pessimistic: 1%

21. [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: 45%
- Our bookings have remained the same: 20%
- Our bookings have decreased: 35%

