



2022 GBTA Business Travel Recovery Poll

April 21, 2022

POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 36%
- Procurement/sourcing professional: 6%
- Supplier: 43%
- TMC: 9%
- Other: 6%

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

- Hotel chain: 30%
- Travel management company: 19%
- Ground transportation: 8%
- Individual hotel property: 11%
- Travel technology: 7%
- Airline: 14%
- Meetings management provider: 1%
- Payment company: 1%
- Consultant: 1%
- Other: 7%



3. [DISPLAY IF Q2 = BUYER] Which of the following industries best describes your organization?

- a. Accommodation and Food Services: 3%
- b. Arts, Entertainment, and Recreation: 2%
- d. Construction: 1%
- e. Consulting: 6%
- f. Educational Services: 3%
- g. Engineering: 2%
- h. Finance and Insurance: 11%
- i. Health Care, Pharmaceuticals and Social Assistance: 10%
- j. Manufacturing: 15%
- k. Media, Information, and Communications: 3%
- l. Mining, Oil and Gas Extraction and Utilities: 7%
- m. Non-profit, Association and Foundation: 5%
- n. Professional, Scientific and Technical: 3%
- o. Public Administration: 2%
- p. Retail / Wholesale Trade: 3%
- q. Software/Technology: 7%
- r. Telecommunications: 1%
- s. Transportation and Warehousing: 2%
- t. Travel and Meetings Management: 3%
- u. Other (please specify): 10%

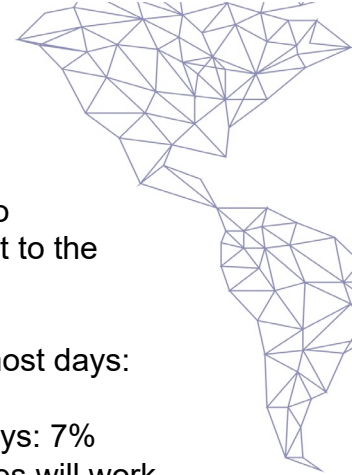
4. Which of the following best describes your company’s current position on employees traveling for business?

| | Not allowed | Rarely allowed | Sometimes allowed | Usually allowed |
|---|-------------|----------------|-------------------|-----------------|
| Non-essential domestic business trips | 5% | 8% | 21% | 65% |
| Non-essential international business trips | 10% | 16% | 29% | 45% |

5. Do your company’s plans for employees to return to the office directly correlate with your company’s return to conducting business travel?

- Yes: 41%
- No: 46%
- Not sure: 8%
- Other: 6%





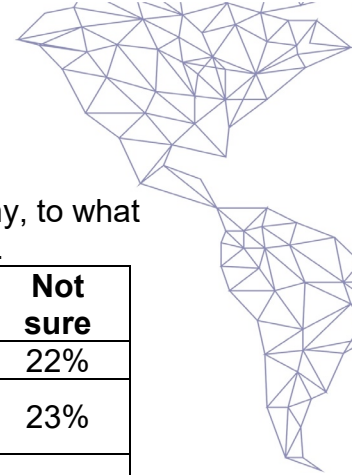
6. Which of the following best describes your company’s permanent return to office/work-from-home policy? This addresses if employees need to report to the office or can work from home all of the time or some of the time.
- Full-time in-office: Most employees will commute to the office most days: 23%
 - Full-time remote: Most employees will work from home most days: 7%
 - Part-time in-office/part-time remote (i.e., hybrid): Most employees will work from the office some days and work from home other days: 52%
 - Flex time (employee choice): 12%
 - Other: 5%
 - Not sure: 1%

7. To what extent have business travel policies evolved or changed at your company due to the pandemic?
- Fewer business trips overall: 39%
 - Employees take fewer business trips, but there are more objectives and goals assigned to each trip completed: 37%
 - More trip approval requirements: 24%
 - A company re-evaluation of how employees will travel for business (ex: safety considerations, types of transport, sustainable hotel stays, etc.): 23%
 - A company re-evaluation of why/who travels for business (ex: return to base travel, internal meetings, etc.): 22%
 - There has been no change: 20%
 - An overall company reevaluation of what it defines as “business travel”: 12%
 - Other: 5%

8. [How has inflation impacted your company’s business travel spending on the following expenses?

| | Increased spending | No spending increase | Not sure |
|---------------------------|---------------------------|-----------------------------|-----------------|
| Daily per diems for meals | 19% | 50% | 31% |
| Airfares | 41% | 34% | 25% |
| Hotel rates | 34% | 42% | 24% |
| Car rentals | 33% | 39% | 29% |
| Ride share/taxis | 26% | 42% | 32% |
| Rail travel | 16% | 39% | 45% |





9. [DISPLAY IF Q2=BUYER/PROCUREMENT] Thinking about your company, to what extent do you think sustainability considerations will have an impact on. . .

| | Yes | No | Not sure |
|---|-----|-----|----------|
| Fewer trips per employee | 54% | 24% | 22% |
| Length of trips may be longer with more meetings or destinations | 43% | 34% | 23% |
| More rail or multi-modal transportation options other than airplanes | 34% | 42% | 24% |
| Using more public transport compared to individual cars | 29% | 47% | 24% |
| Travelers are allowed to fly business class less frequently | 19% | 61% | 19% |
| Encourage employees to blend a business trip with personal activities, e.g., extending over a weekend, at that destination to have less impact on airline emissions overall | 15% | 61% | 24% |

10. Adjusting to being back out on the road isn't always easy, even for experienced business travelers. Have you personally experienced or heard from your colleagues any of the following when taking business trips in 2021/2022? Please select all that apply.

- Confusion on travel restrictions/travel documentation (visas, etc.): 63%
- More anxious / stressed about business travel: 45%
- Challenges navigating airports and security rules: 36%
- Forgot to pack key items: 15%
- Other: 5%
- None of the above: 19%

9. How do you feel about the continuation of mask mandates on commercial flights?

- Governments should continue to require all passengers wear masks on commercial flights: 41%
- Governments should allow airlines to decide if passengers are required to wear masks: 32%
- Governments should prohibit mask mandates (i.e., allow passengers to fly on any airline without masks): 20%
- Other: 6%





10. 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%

11. 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 | 13% | 32% | 23% | 16% | 16% |
| All Domestic Travel | 4% | 16% | 26% | 21% | 33% |
| All Travel (Domestic and International) | 5% | 22% | 29% | 23% | 21% |

12. 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 | 52% | 38% | 6% | 4% |
| All Domestic Travel | 75% | 16% | 5% | 4% |
| All Travel | 62% | 27% | 4% | 7% |





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

- Very optimistic: 30%
- Optimistic: 56%
- Neither optimistic nor pessimistic: 10%
- Pessimistic: 3%
- Very pessimistic: 0%

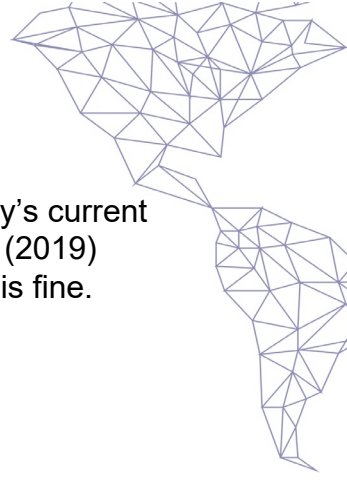
14. [DISPLAY IF AIRLINE, HOTEL, TMC, OR GROUND TRANSPORTATION] You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past week?

- Our bookings have increased: 88%
- Our bookings have remained the same: 5%
- Our bookings have decreased: 7%

15. [DISPLAY IF Q2=SUPPLIER/TMC] 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: 5%
 - 11-20% of our pre-pandemic bookings: 11%
 - 21-30% of our pre-pandemic bookings: 16%
 - 31-40% of our pre-pandemic bookings: 18%
 - 41-50% of our pre-pandemic bookings: 9%
 - 51-60% of our pre-pandemic bookings: 15%
 - 61-70% of our pre-pandemic bookings: 10%
 - 71-80% of our pre-pandemic bookings: 6%
 - 81-90% of our pre-pandemic bookings: 4%
 - 91-100% of our pre-pandemic bookings: 2%
 - We have exceeded our pre-pandemic bookings: 2%
 - Not sure: 2%
-
- Mean: 43.7%
 - Median: 35.0%





16. [DISPLAY IF Q2=**BUYER/PROCUREMENT**] 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: 4%
 - 11-20% of our pre-pandemic bookings: 5%
 - 21-30% of our pre-pandemic bookings: 9%
 - 31-40% of our pre-pandemic bookings: 8%
 - 41-50% of our pre-pandemic bookings: 9%
 - 51-60% of our pre-pandemic bookings: 13%
 - 61-70% of our pre-pandemic bookings: 14%
 - 71-80% of our pre-pandemic bookings: 9%
 - 81-90% of our pre-pandemic bookings: 4%
 - 91-100% of our pre-pandemic bookings: 2%
 - We have exceeded our pre-pandemic bookings: 2%
 - Not sure: 2%
-
- Mean: 56.0%
 - Median: 55.0%

17. Thinking about your company's spending on business travel, how do you expect it will compare to what business travel spend was in 2019? Your best estimate is fine.

- **2022** expected spending is estimated to be approximately _____% of 2019's business travel spend:

- Mean: 59.0%
- Median: 60.0%

- **2023** expected spending is estimated to be approximately _____% of 2019's business travel spend:

- Mean: 79.0%
- Median: 80.0%

