

Business Travel Recovery Poll Results

April 21, 2022

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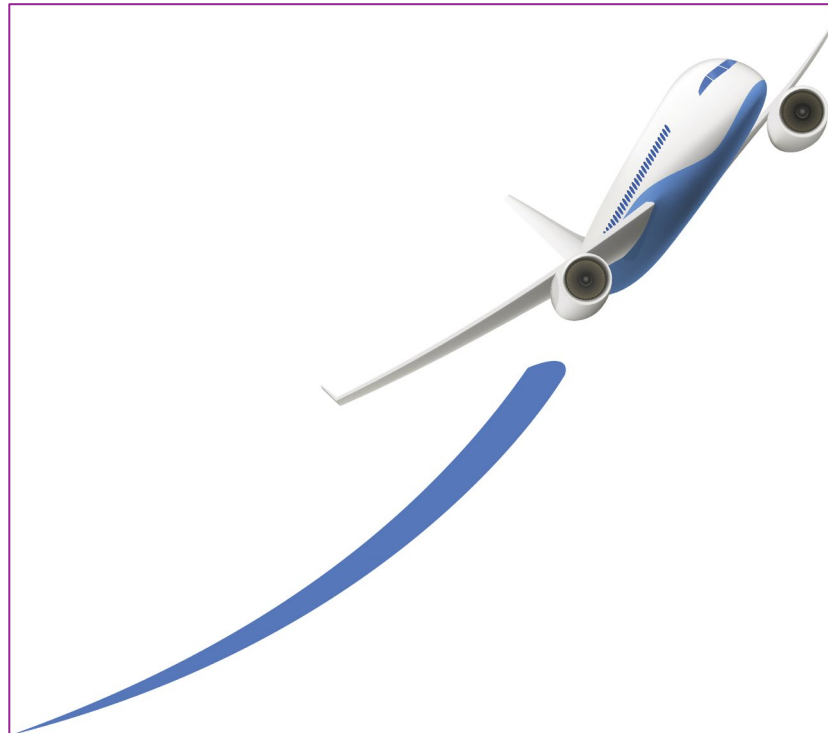


Methodology

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

- Fielding took place from April 4 through April 12, 2022
- An email invitation was sent to 10,526 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, 520 business travel professionals responded
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number

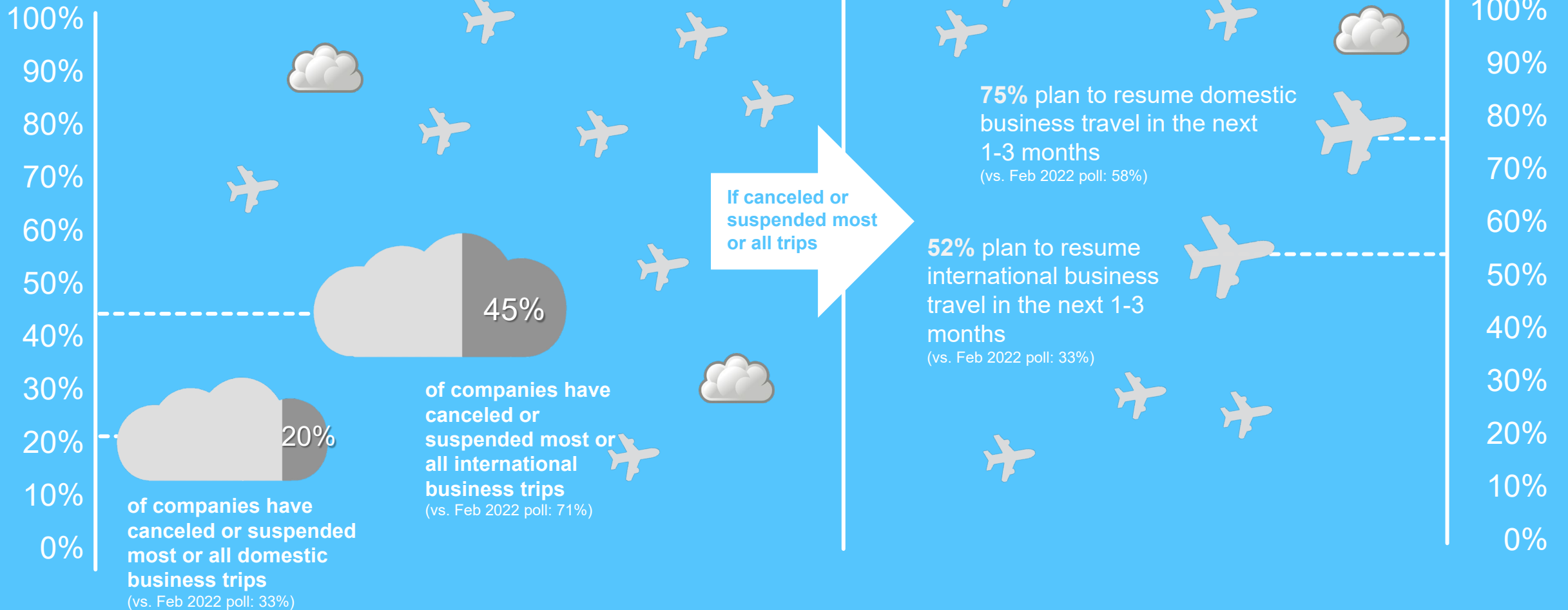
The State of Global Business Travel





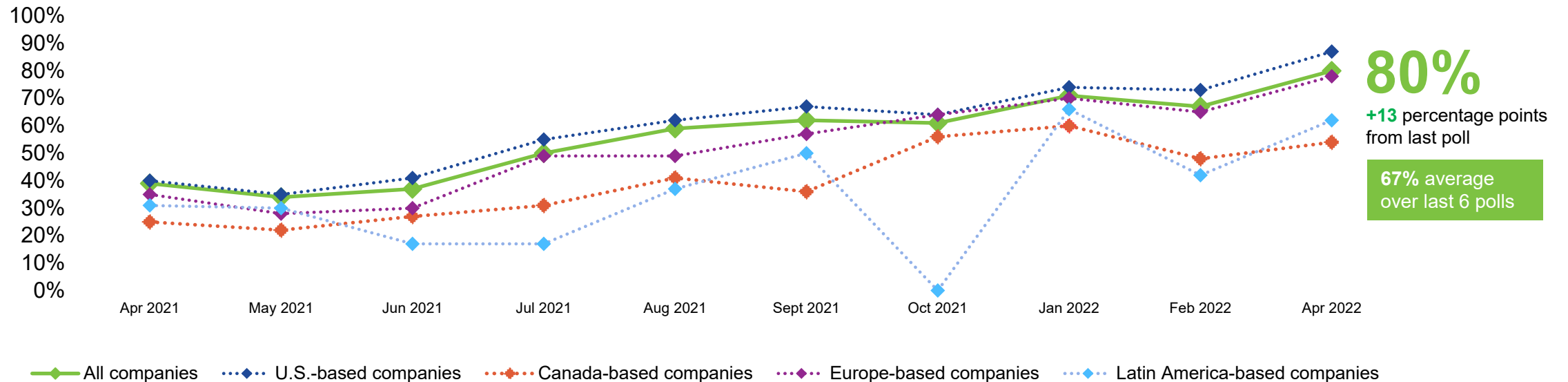
The State of Global Business Travel

April 2022



The State of Domestic Business Travel

% of companies allowing some or more domestic business travel within their country

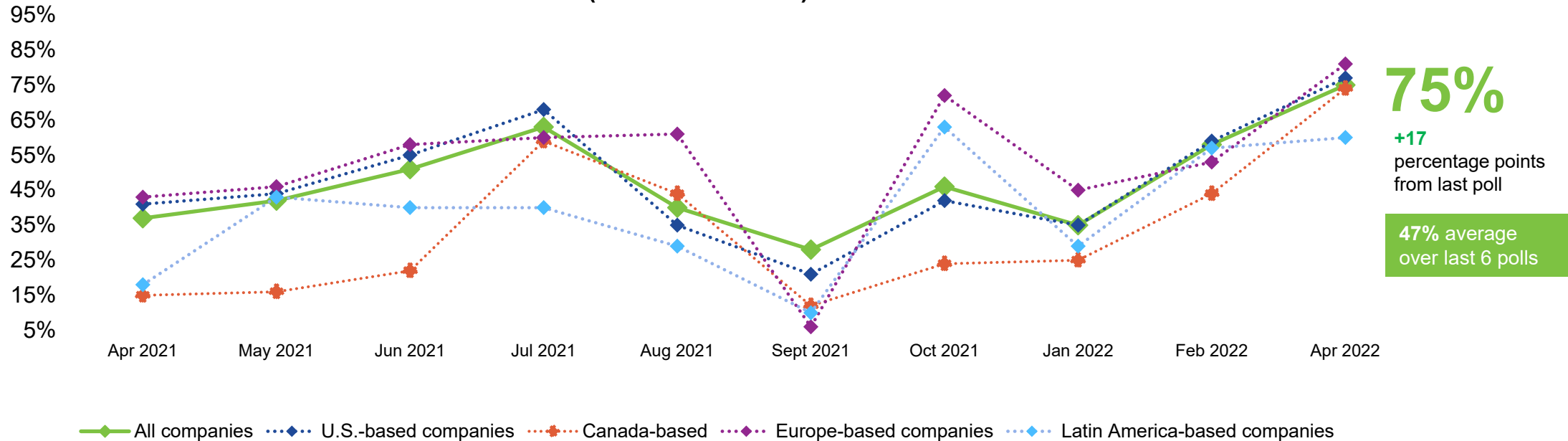


Note: The GBTA Coronavirus Poll wasn't conducted in November and December 2021 or March 2022
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)
 Percentages calculated by subtracting the percentage who have canceled or suspended "most" or "all" business trips from 100%



The State of Domestic Business Travel (Cont.)

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



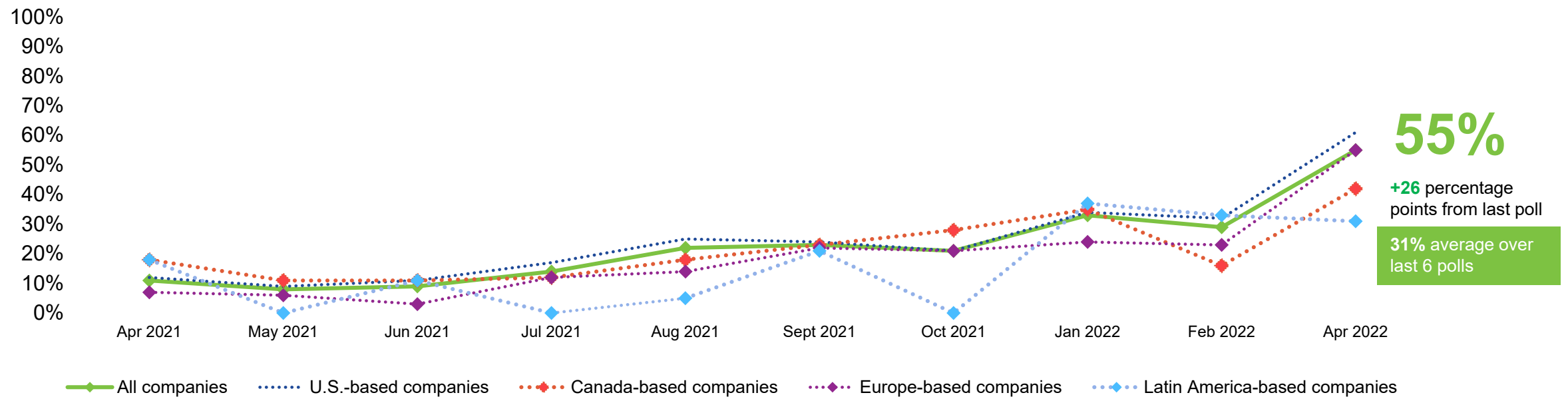
*Figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country

*Note: The GBTA Coronavirus Poll wasn't conducted in November and December 2021 or March 2022

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

The State of International Business Travel

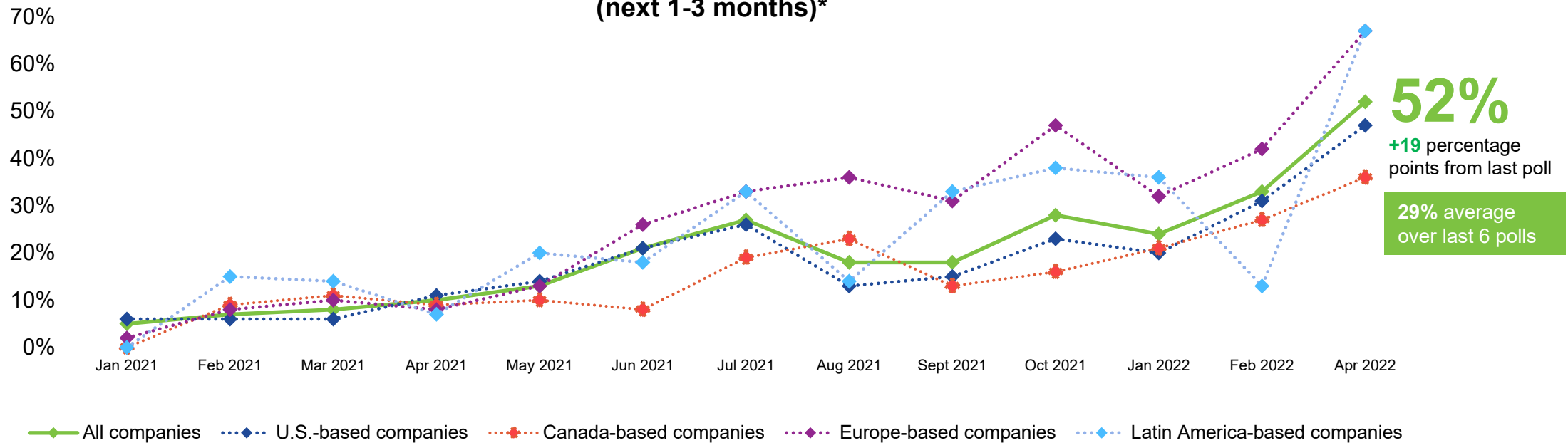
% of companies allowing some or more international business travel



Note: The GBTA Coronavirus Poll wasn't conducted in November and December 2021 or March 2022
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)
 Percentages calculated by subtracting the percentage who have canceled or suspended "most" or "all" business trips from 100%

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 domestic business trips within their country

Note: The GBTA Coronavirus Poll wasn't conducted in November and December 2021 or March 2022

*Figures are among those that indicated their company has canceled or suspended most or all international business trips

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Corporate Travel Bookings Soar

How have bookings from your corporate customers changed in the past month?

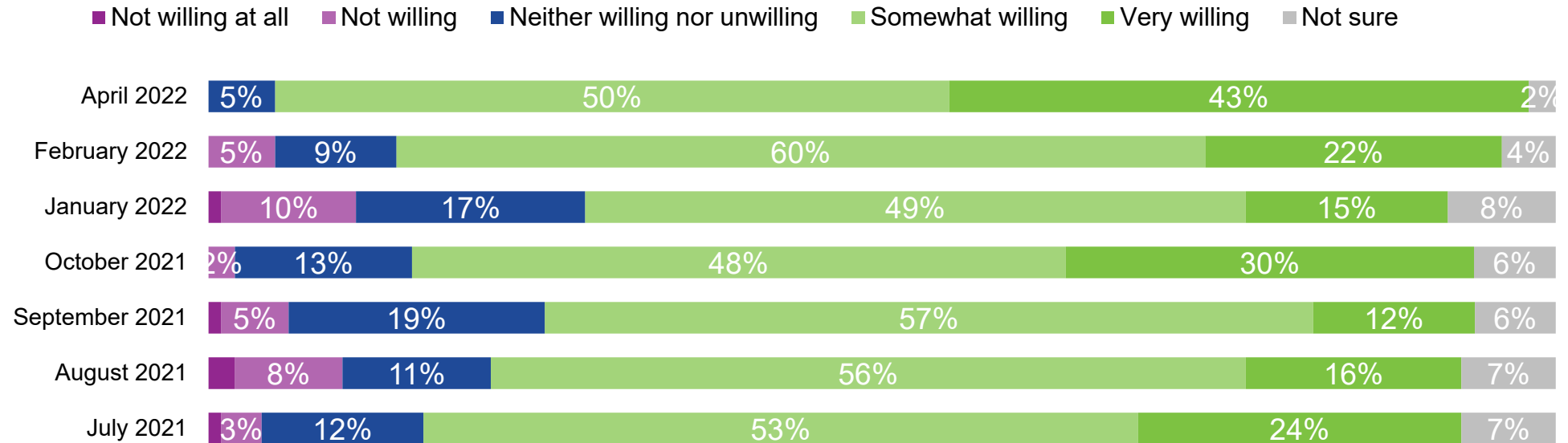


Note: Question only displayed to respondents who work for an airline, hotel chain, hotel property, TMC, or ground transportation company

Q. You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past month? (n=137-218) Note: Before September 2021, this question asked how about how bookings changed in the past week.

More Than 9 in 10 Travel Managers Say Their Company's Employees Are Willing to Travel for Work

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



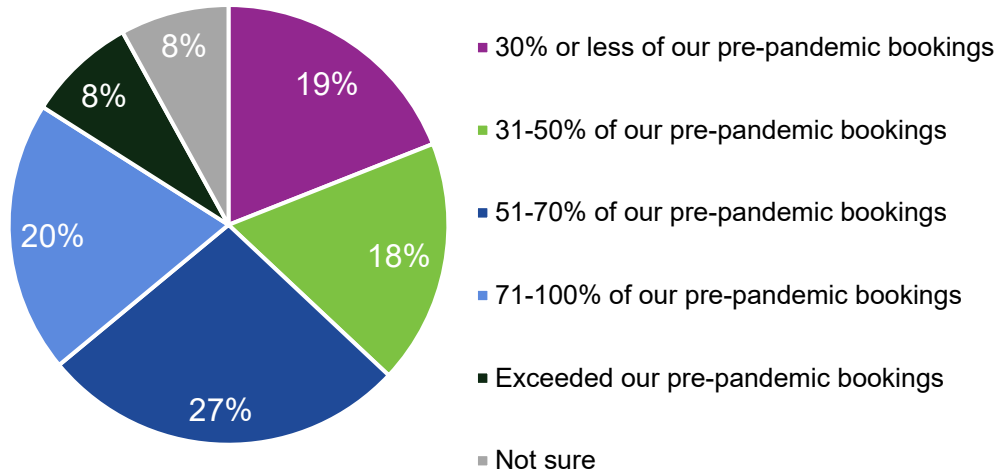
Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=191-448)

Bookings Continue to Return to Pre-Pandemic Levels

Travel Buyers

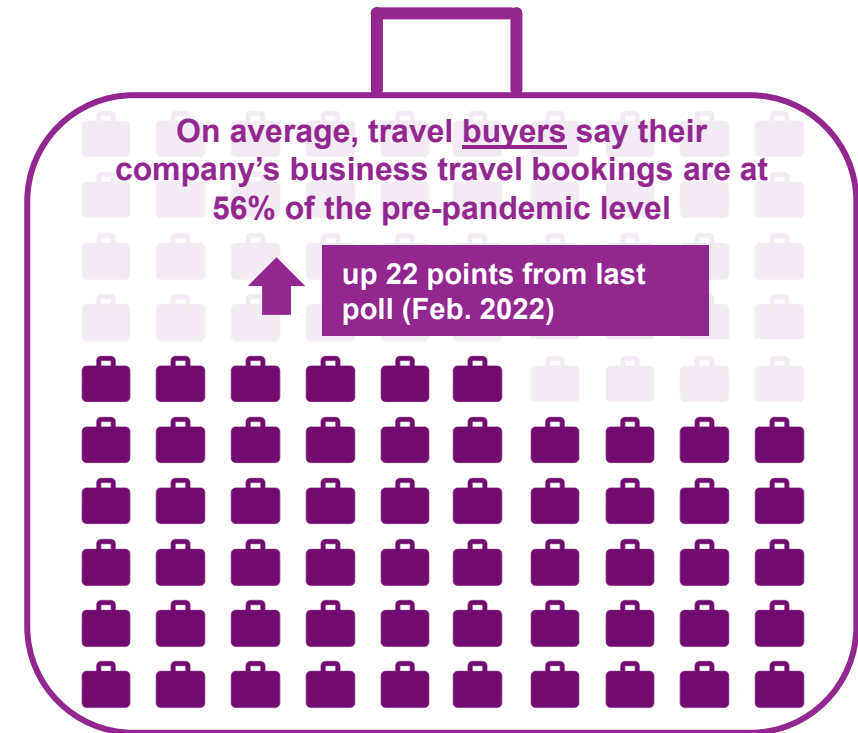
Would you say your company is currently at...?



Q. 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...?

Note: Only displayed to travel buyers/procurement professionals (n=225)

Note: Respondents were given ranges in 10-point intervals; these were combined into groups to make interpretation easier



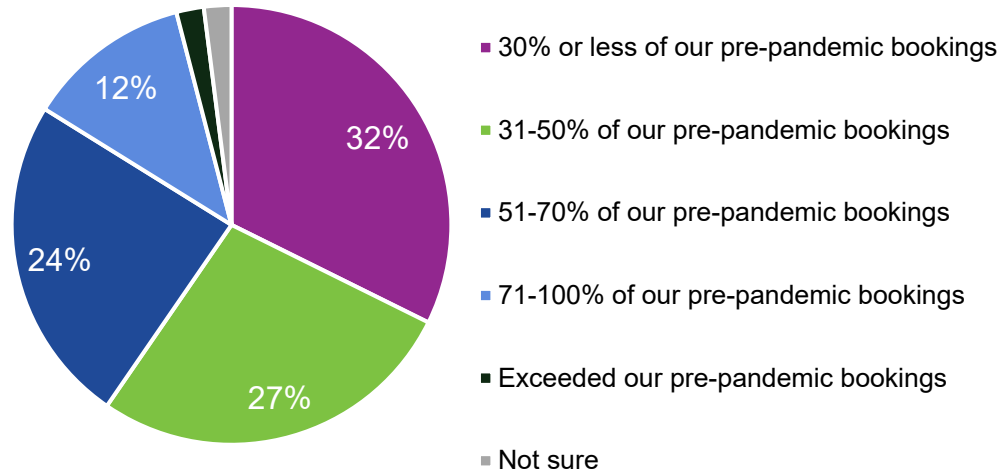
Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Bookings Continue to Return to Pre-Pandemic Levels (Cont.)



Travel Suppliers

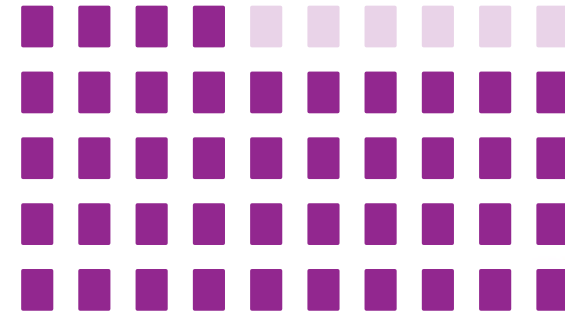
Would you say your company is currently at...?



Hotel California

On average, travel suppliers say their company's business travel bookings are at 44% of the pre-pandemic level

↑ up 2 points from last poll (Feb. 2022)



Q. 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.

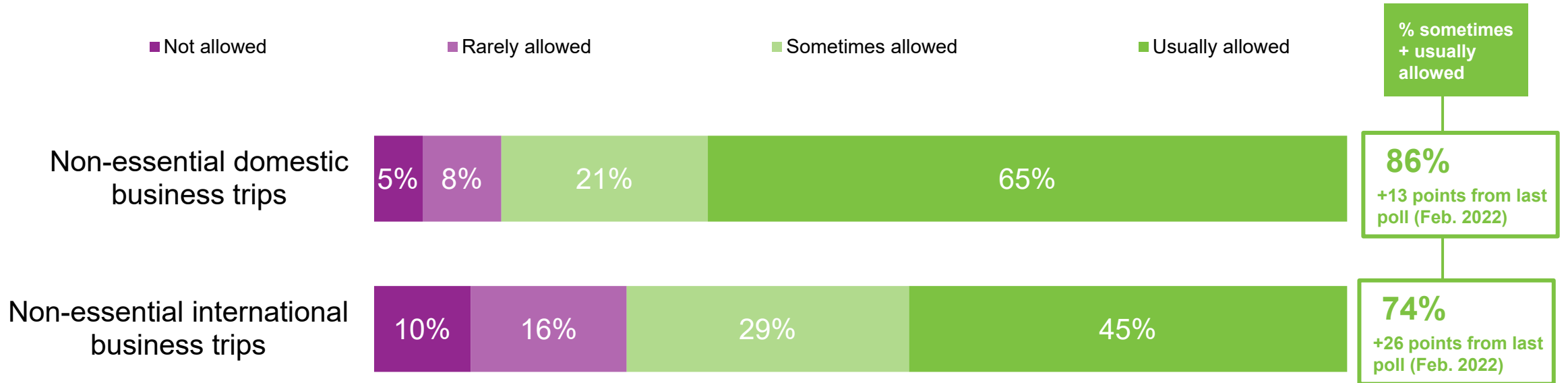
Note: Only displayed to travel supplier/TMC professionals (n=189)

Note: Respondents were given ranges in 10-point intervals; these were combined into groups to make interpretation easier

Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Companies Resume International Business Travel

Company's current position on employees traveling for business

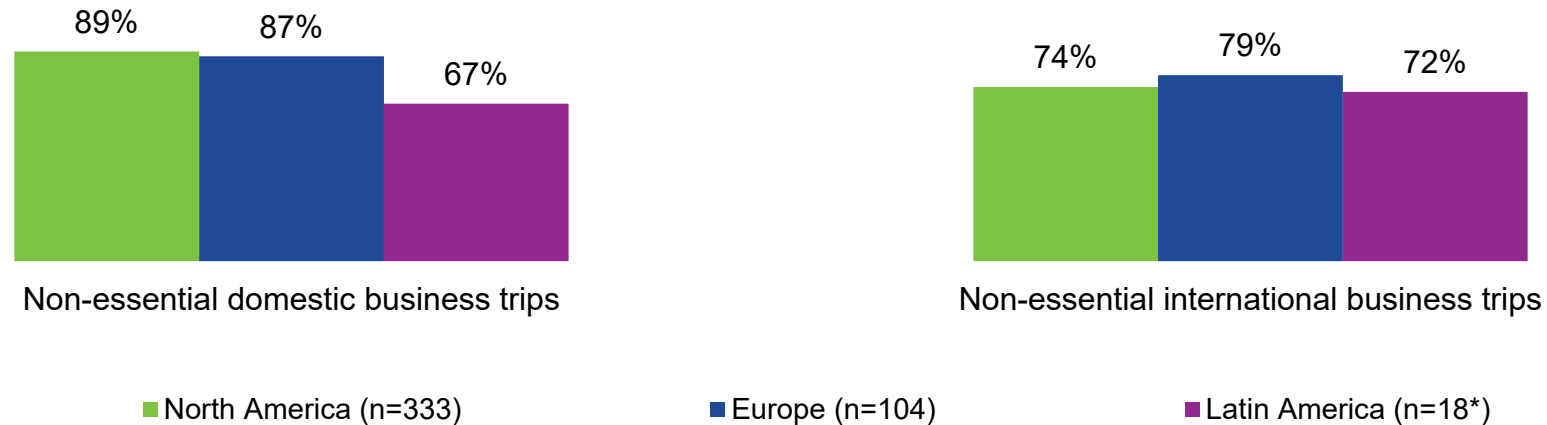


Q. Which of the following best describes your company's current position on employees traveling for business? (n=689-737)

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

Most Companies Allow Employee Travel Regardless of Region

Company's current position on employees traveling for business
% "usually" or "sometimes" allowed by region



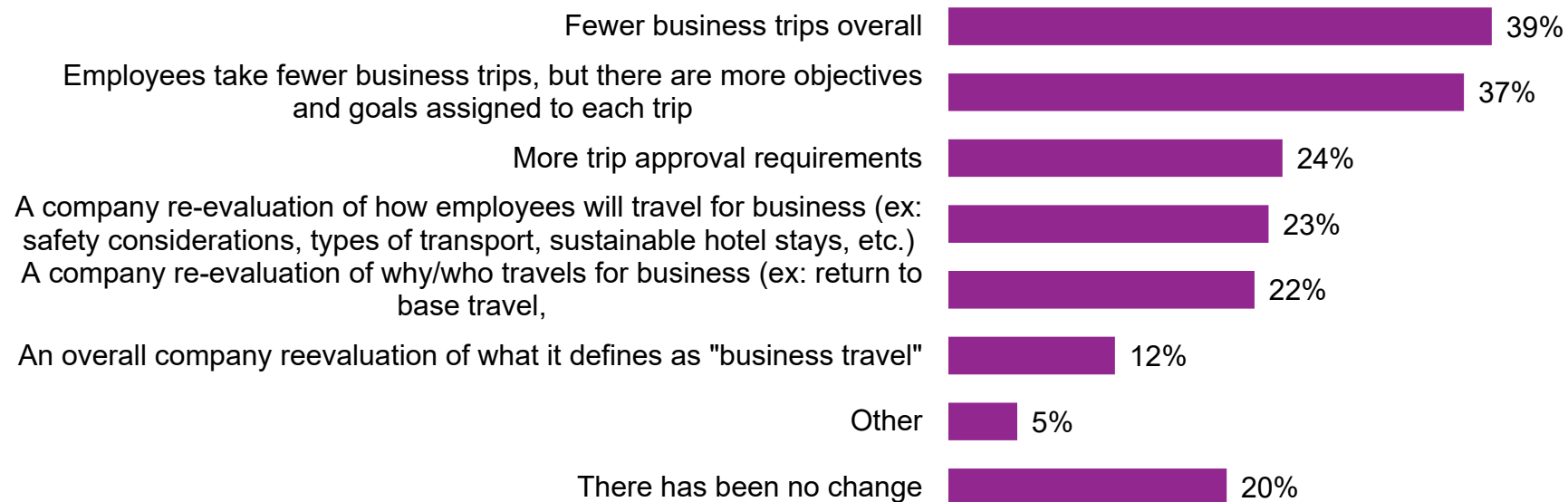
Q. Which of the following best describes your company's current position on employees traveling for business? (n=689-737)
**indicates small sample size in Latin America (n<30)*

Key Highlights



Companies Have Made Changes to Their Travel Program During the Pandemic

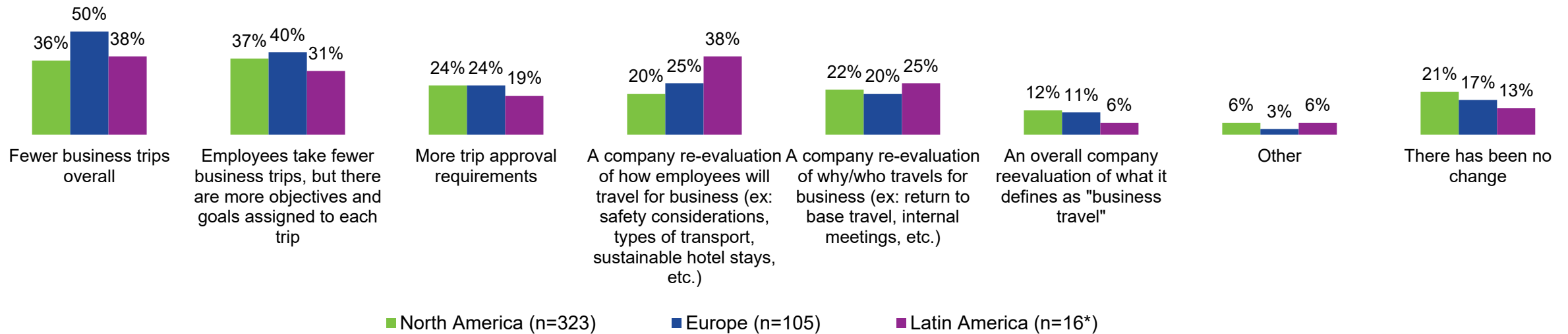
What travel policy changes have companies made during the pandemic?



Q. To what extent have business travel policies evolved or changed at your company due to the pandemic?
Please select all that apply (n=456)

Companies Have Made Changes to Their Travel Program During the Pandemic (Cont.)

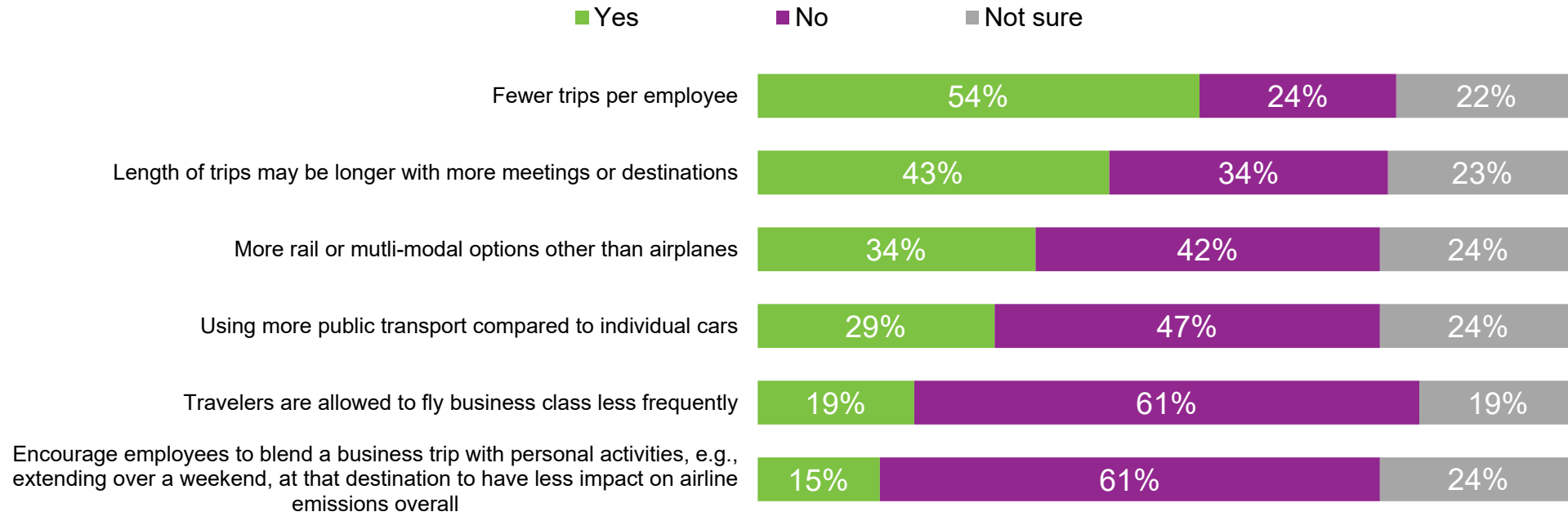
What travel policy changes have companies made during the pandemic?
by region



Q. To what extent have business travel policies evolved or changed at your company due to the pandemic? **Please select all that apply**
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)

How Will Sustainability Transform Travel Programs?

Will sustainability impact travel program in various ways?

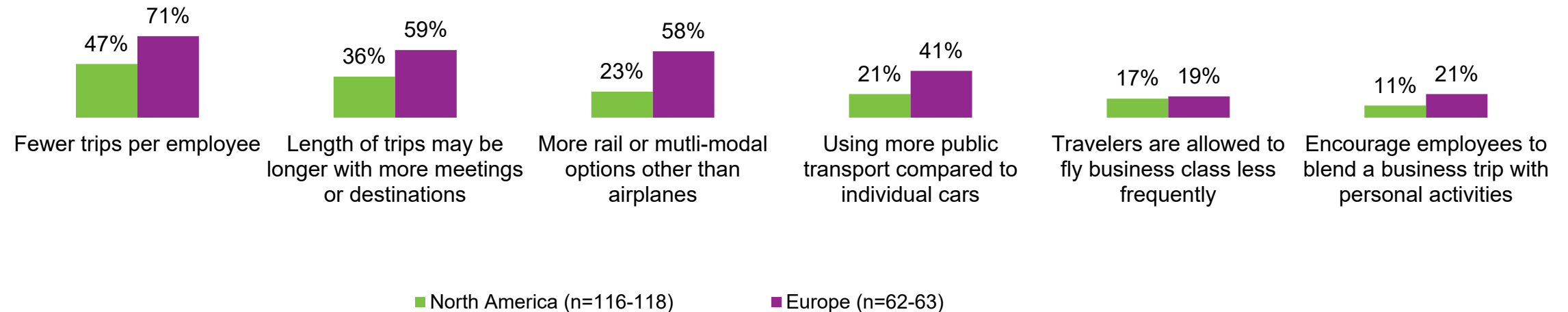


Q. Thinking about your company, to what extent do you think sustainability considerations will have an impact on...?

Note: Question only displayed to travel managers/procurement professionals (n=188-190)

European Companies Appear More Likely to Reduce Business Travel

Will sustainability impact travel program in various ways?
by region

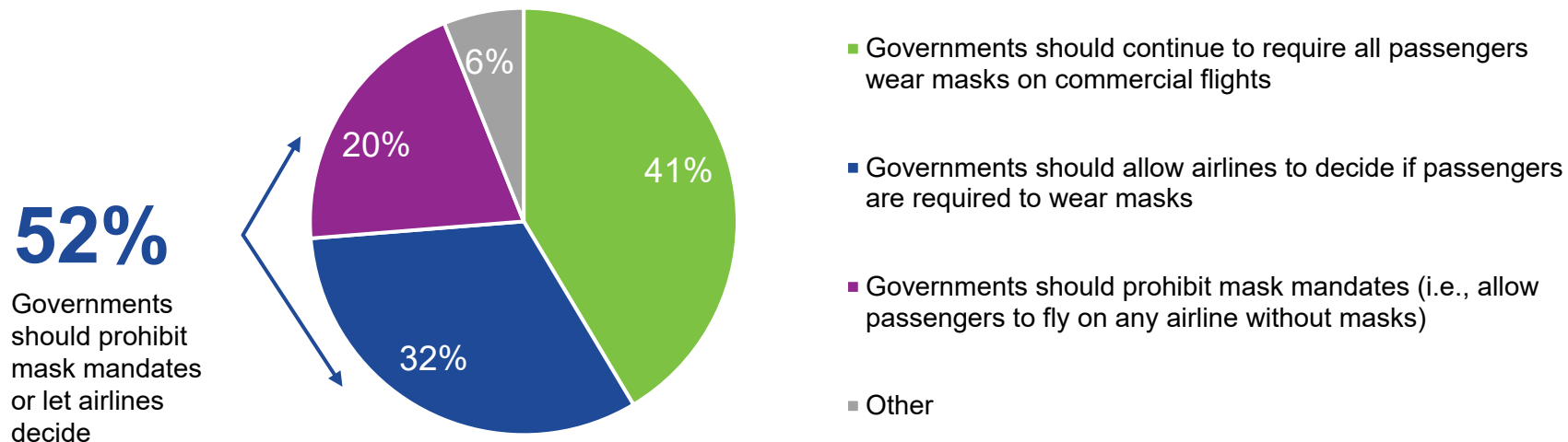


Q. Thinking about your company, to what extent do you think sustainability considerations will have an impact on...?

Note: Question only displayed to travel managers/procurement professionals

More Than Half of Respondents Don't Support Government Mask Mandates on Commercial Flights

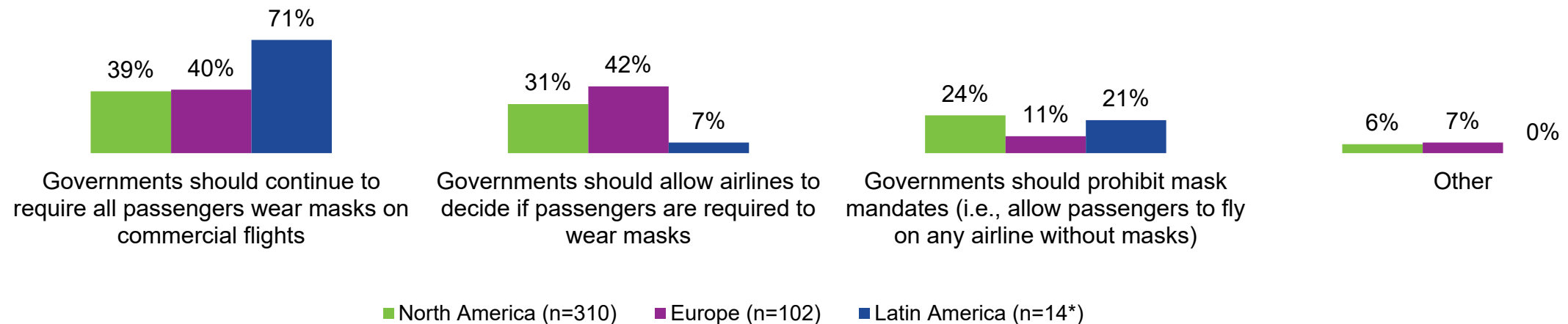
How do you feel about the continuation of mask mandates on commercial flights?



Q. How do you feel about the continuation of mask mandates on commercial flights (n=438)

Mask Mandate Sentiment Aligns in North America and Europe, Differs in Latin America

How do you feel about the continuation of mask mandates on commercial flights?
by region



Q. Thinking about your company, to what extent do you think sustainability considerations will have an impact on...?

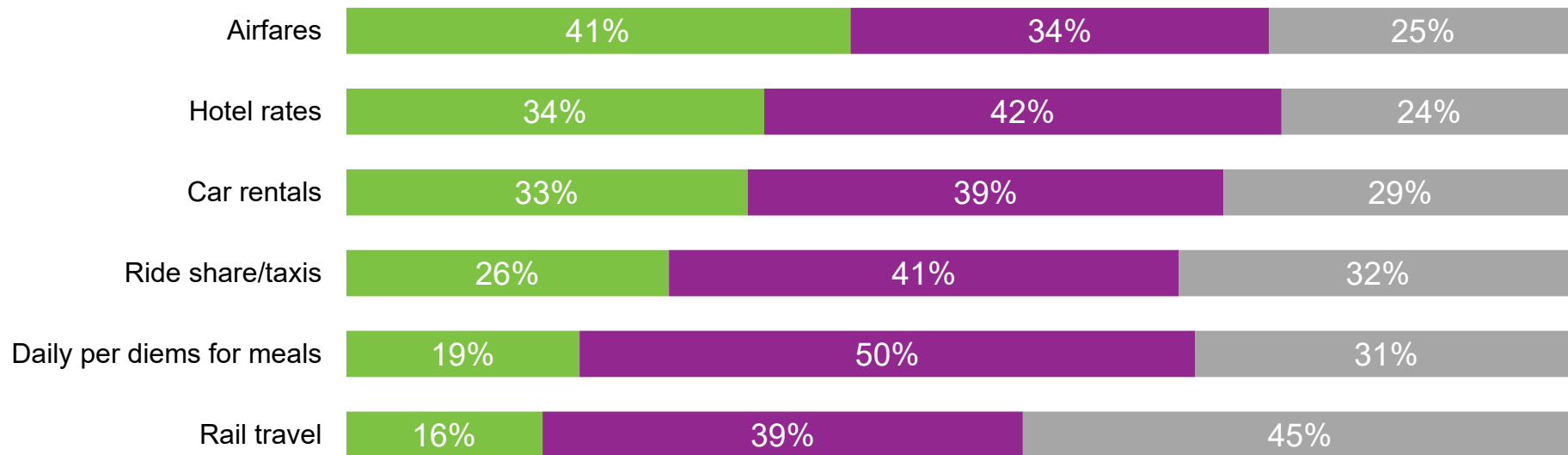
Note: Question only displayed to travel managers/procurement professionals

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

How Has Inflation Impacted Travel Program Spending?

Has inflation impacted company spending on various travel categories?

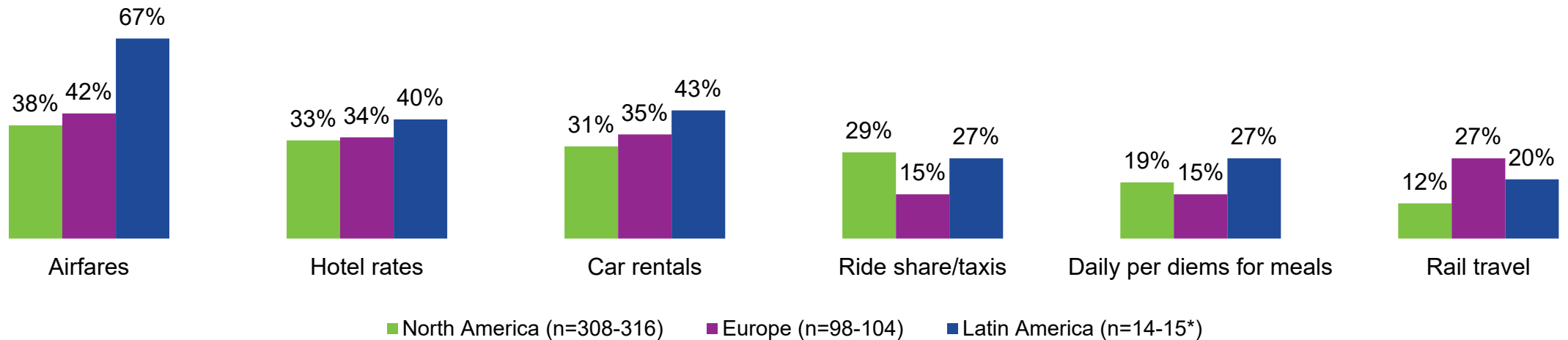
■ Increased spending ■ No spending increase ■ Not sure



Q. How has inflation impacted your company's business travel spending on the following expenses? (n=431-445)

Few Regional Differences When It Comes to Impact of Inflation on Travel Spending

Has inflation impacted spending on various travel categories?
% increased spending" by region

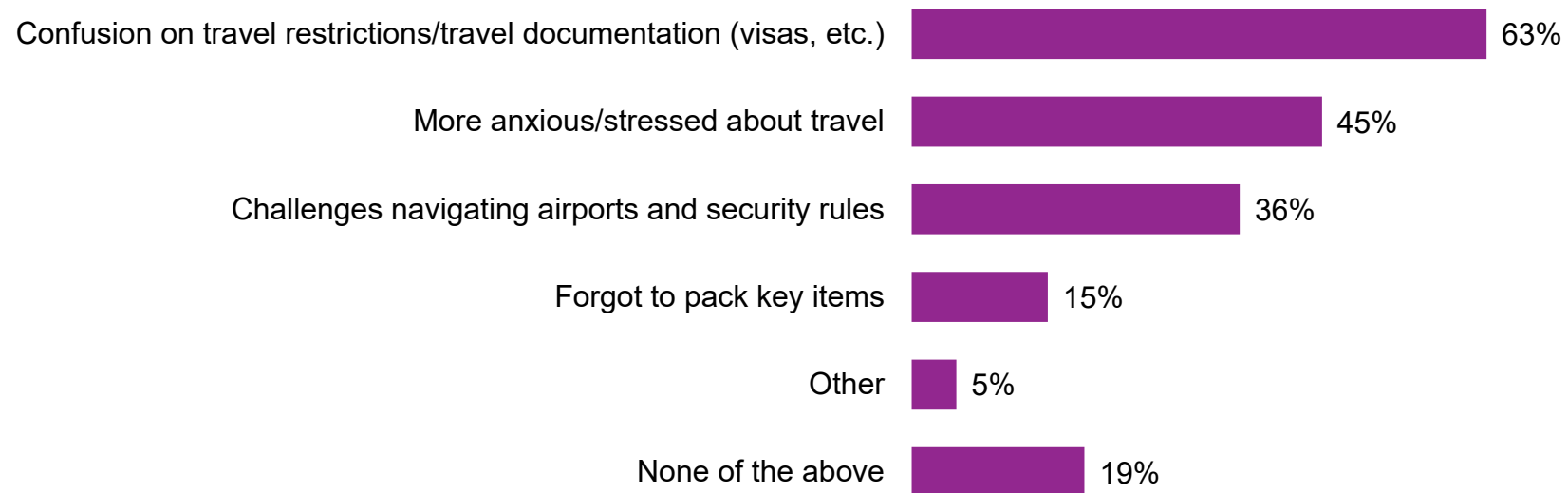


Q. How has inflation impacted your company's business travel spending on the following expenses?

*indicates small sample size for Latin America (n<30)

Are Some Business Travelers More Stressed Today?

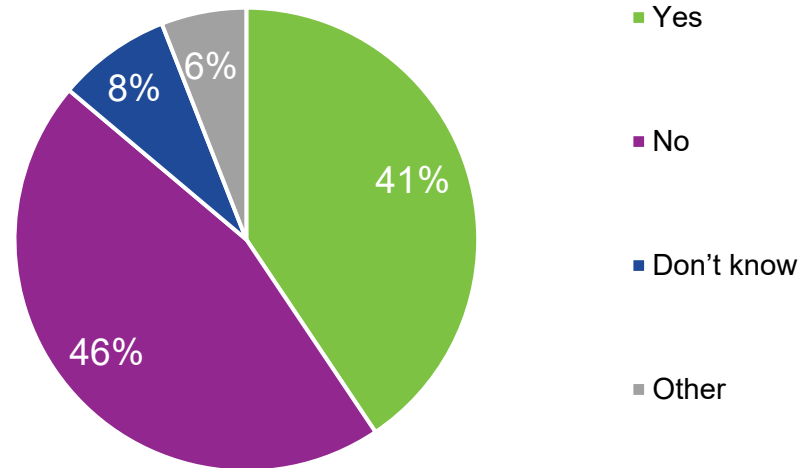
Have you personally experienced or heard from your colleagues any of the following when taking business trips in 2021 and 2022?
(multiple answers allowed)



Q. Adjusting to being back on the road isn't 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. (n=442)**

Is There a Correlation Between “Return to Travel” and “Return to Office”?

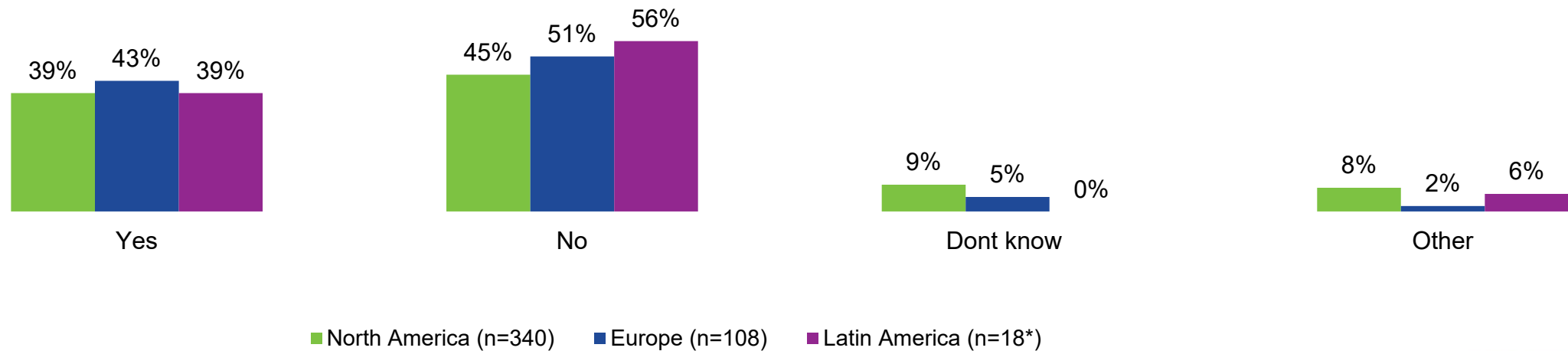
Do a company’s “return to office” plans directly correlate with “return to travel” plans?



Q. Does your company’s “Return to the Office” plans directly correlate with “Return to Business Travel?” (n=479)

By Region, Return to Travel May or May Not Correlate to Return to Office

Do company's "return to office" plans directly correlate with "return to travel" plans?
by region

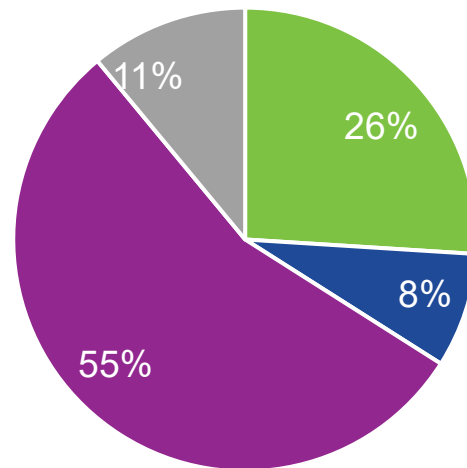


Q. Does your company's "Return to the Office" plans directly correlate with "Return to Business Travel?"

*indicates small sample size for Latin America (n<30)

Most Companies Have Implemented Their Permanent Return to Office/Work From Home Policy

Which best describes permanent return to office/work-from-home policy?



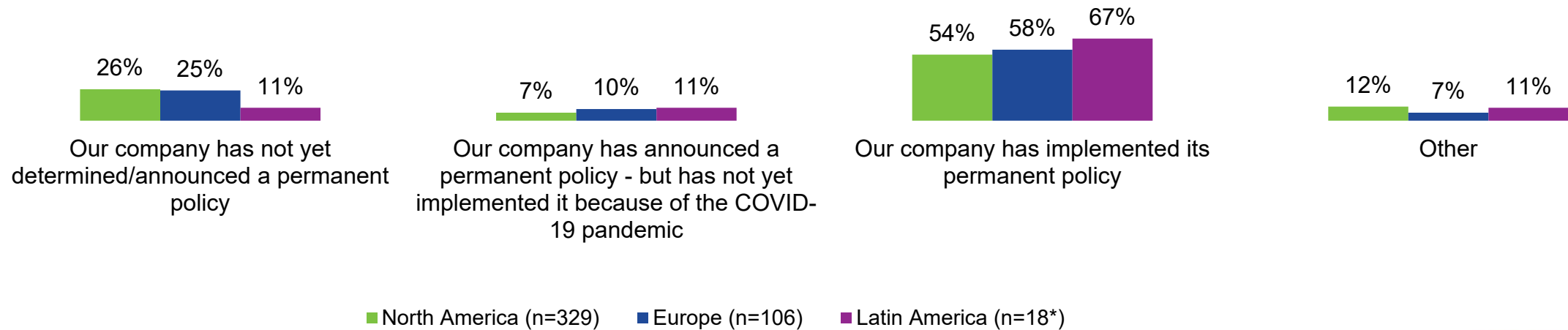
- Our company has not yet determined/announced a permanent policy
- Our company has announced a permanent policy - but has not yet implemented it because of the COVID-19 pandemic
- Our company has implemented its permanent policy
- Other

Q. Which of the following best describes your company's permanent return to office/work from home policy?

This addresses if employees need to return to the office or can work from home all of the time or some of the time. (n=465)

Most Companies Have Implemented Their Permanent Return to Office/Work From Home Policy (Cont.)

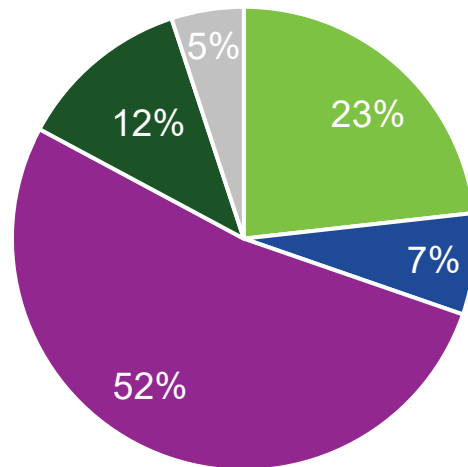
Which best describes permanent return to office/work-from-home policy?
by region



Q. Which of the following best describes your company's permanent return to office/work from home policy?
 This addresses if employees need to return to the office or can work from home all of the time or some of the time.
 *indicates small sample size for Latin America (n<30)

Most Companies Provide Employees Flexibility to Work From Home Post-COVID

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



- Full-time in-office: Most employees will commute to the office most days
- Full-time remote: Most employees will work from home most day
- 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
- Flex time (employee choice)
- Other

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=461)

Will Europeans Have More Flexibility to Work From Home?

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



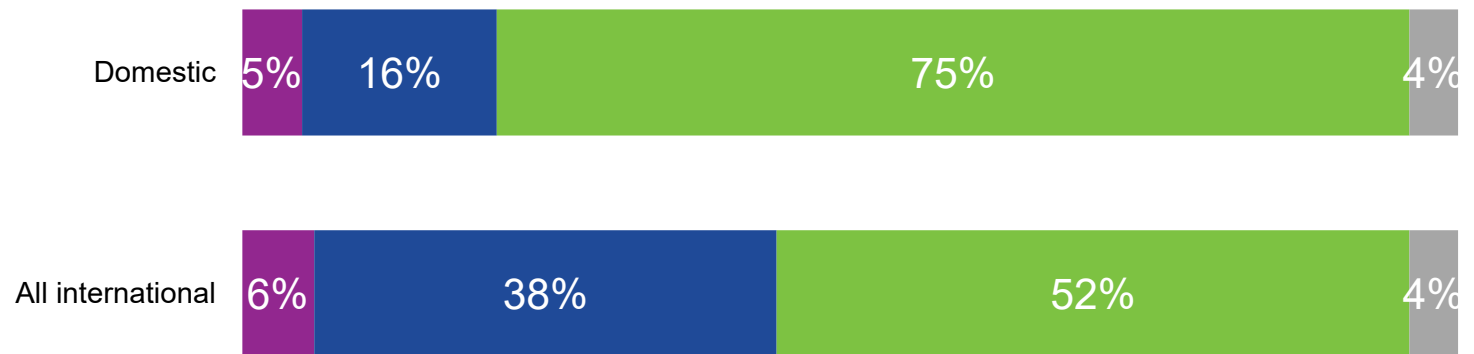
Q. When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply?
*indicates small sample size for Latin America (n<30)

Only 1 in 5 Travel Programs Have Canceled or Suspended Most or All Domestic Business Trips



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. Thinking about your company, how has the coronavirus impacted business travel to... ? (n=341-389)

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=77-153)

Where Are We Heading?

2022

On average, respondents expect to return to **59%** of their pre-pandemic travel spend in 2022...

2023

...and expect to return to **79%** of their pre-pandemic spend in 2023

Q. 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 approximately; 2023 expected spending is approximately. . . (n=348)