



GBTA Business Travel Recovery Poll Results

June 23, 2022

Connecting the people that connect the world.™

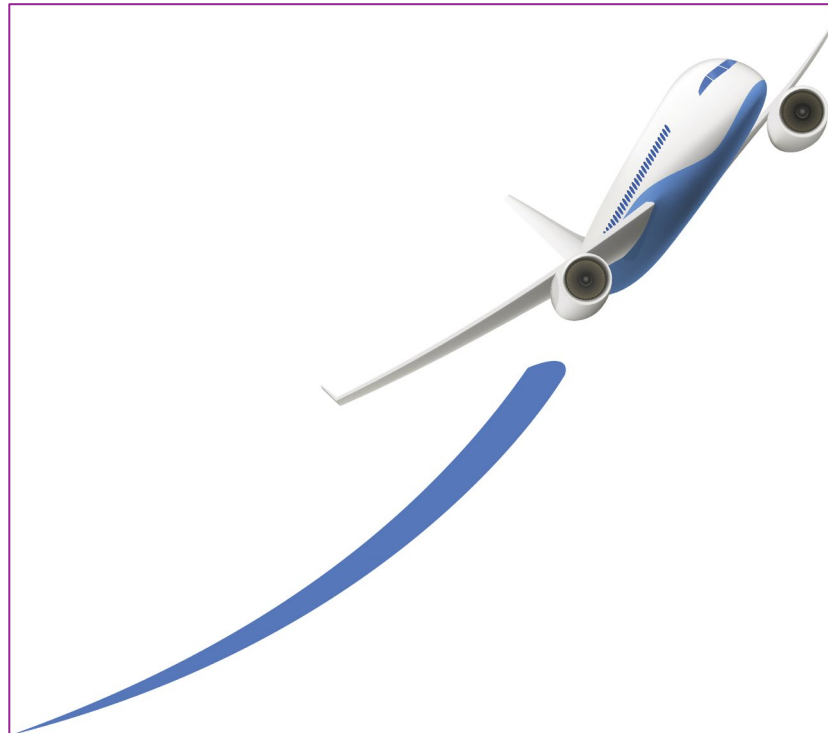


Methodology

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

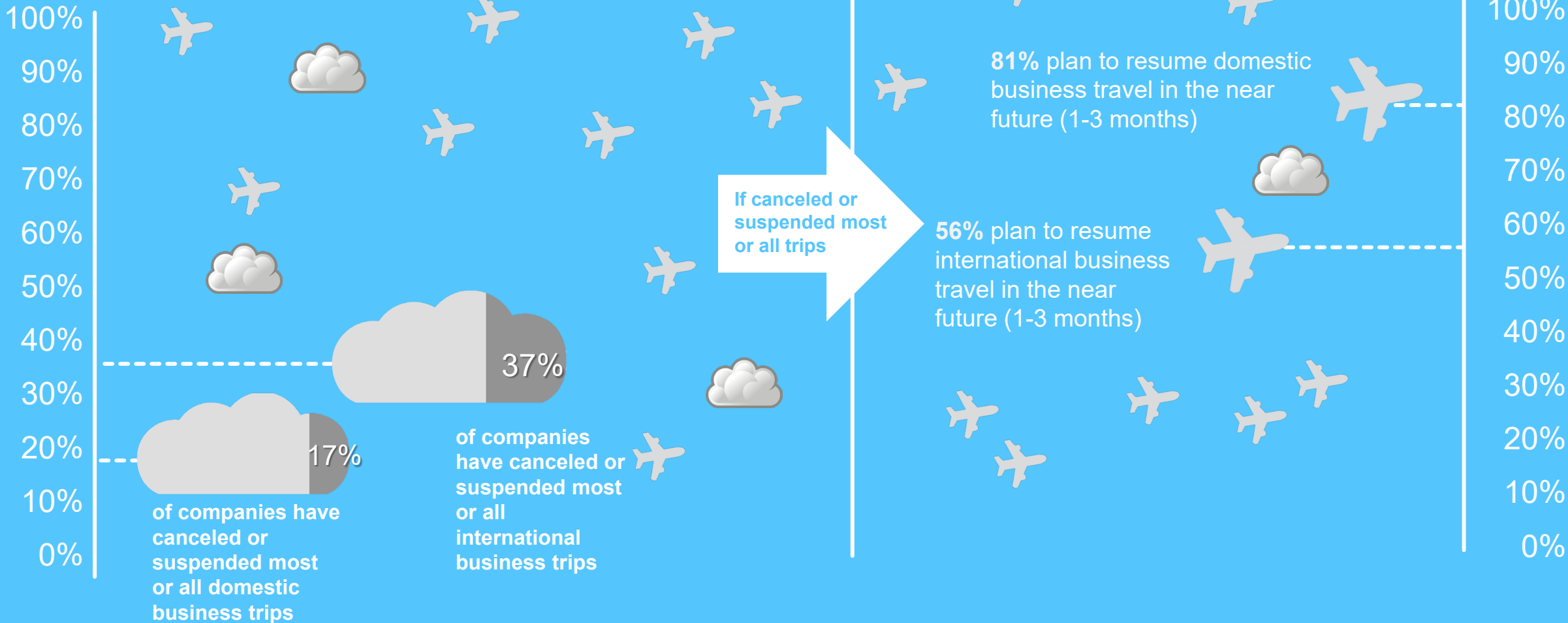
- Fielding took place from June 7 through June 17, 2022
- An email invitation was sent to 8,240 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 547 business travel 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 Business Travel



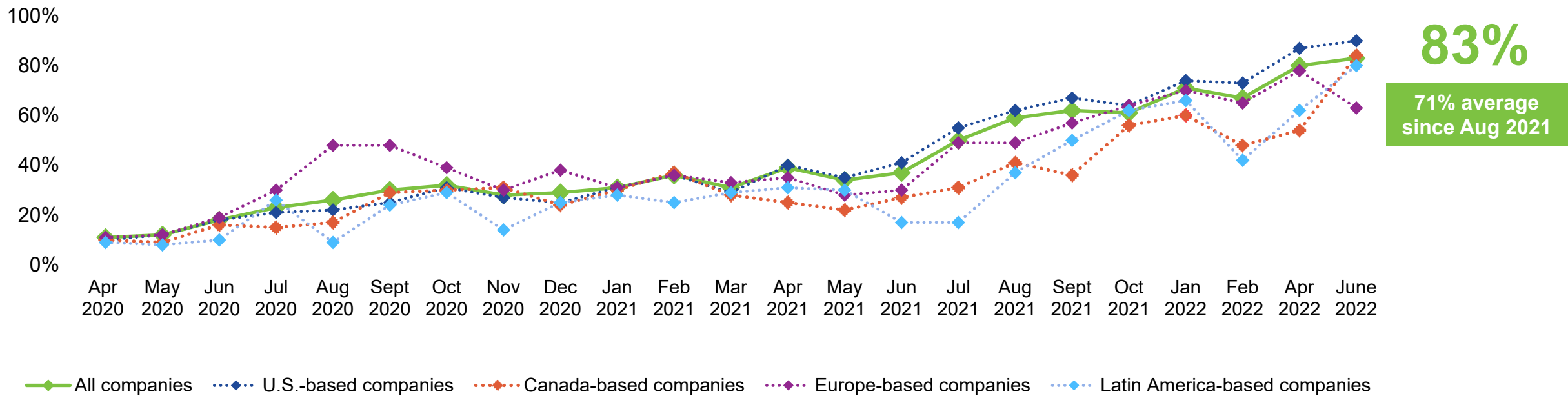
The State of Business Travel

June 2022



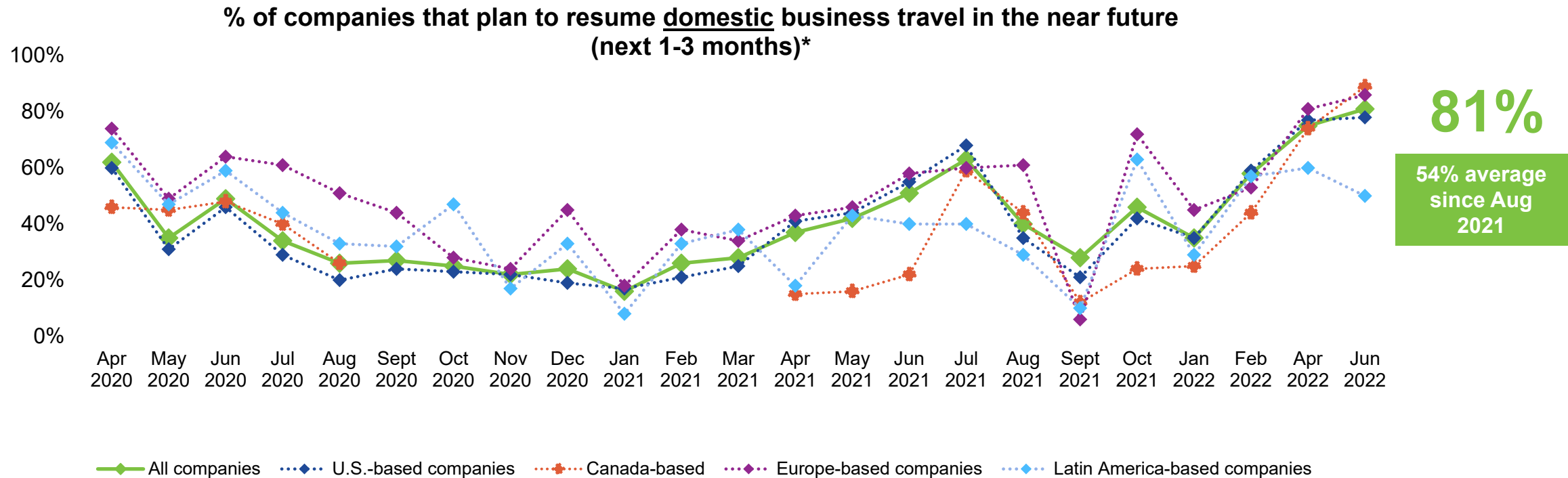
The State of Domestic Business Travel

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



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.)

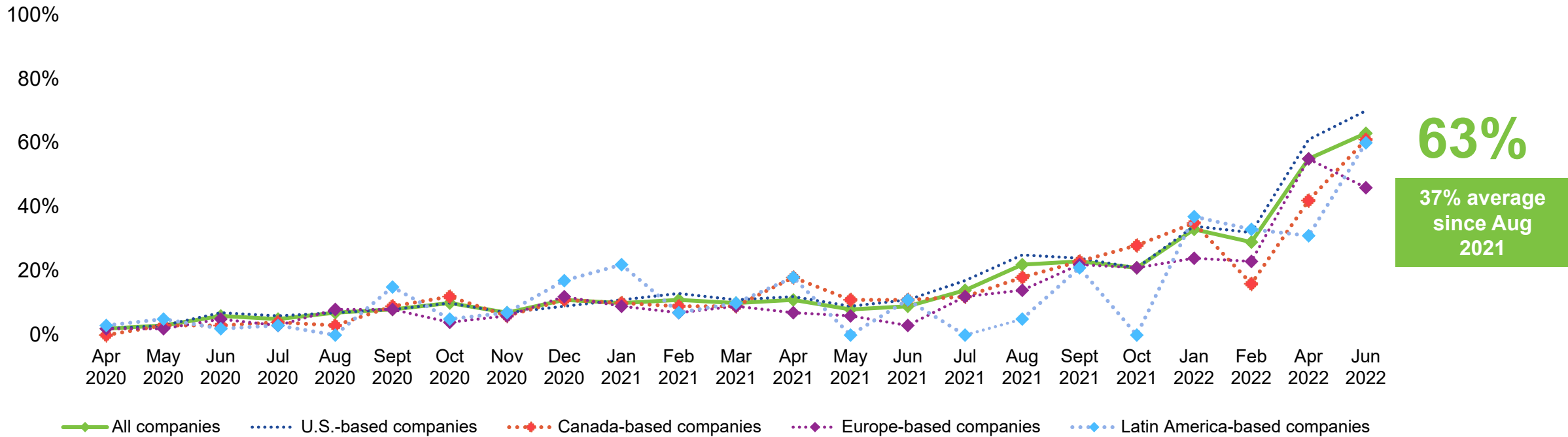


*Figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country

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

The State of International Business Travel

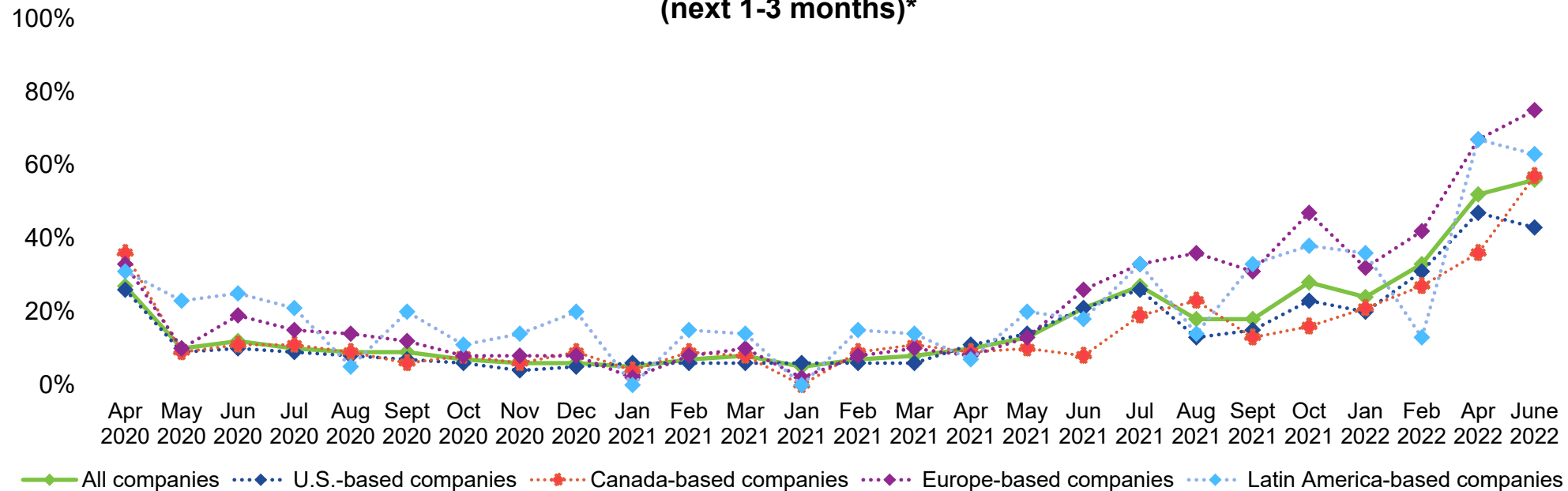
% of companies allowing some or more international business travel



Note: 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)*

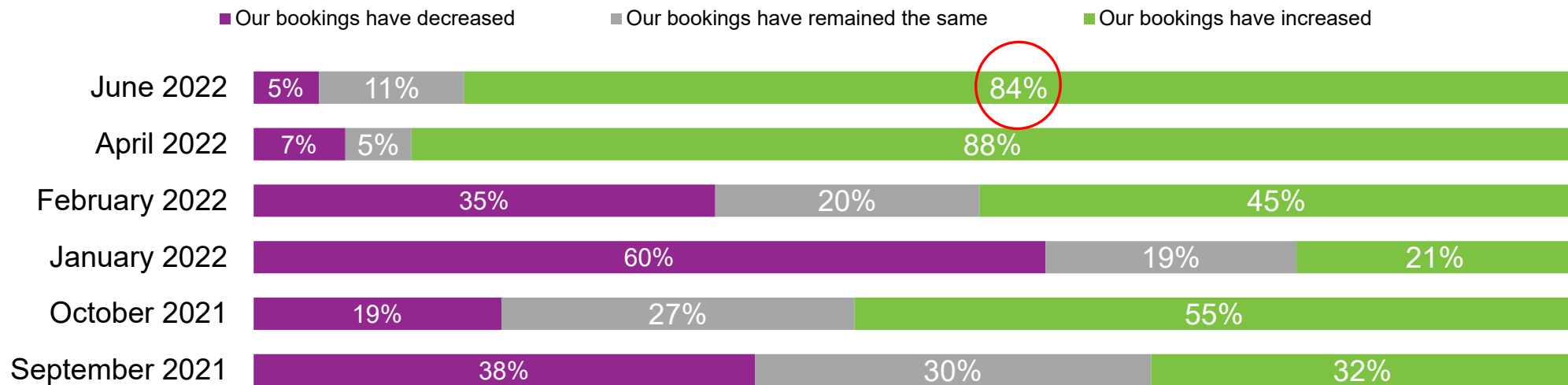


56%
36% average since Aug 2021

*Figures are among those that indicated their company has canceled or suspended most or all international business trips
Note: Small sample size for Latin America-based respondents in recent polls (n<30)

Suppliers Say Travel Bookings Continue to Increase

How have bookings from 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)

More Companies Allowing Business Travel

Company's current position on employees traveling for business

■ Not allowed ■ Rarely allowed ■ Sometimes allowed ■ Usually allowed

Non-essential domestic business trips



% sometimes + usually allowed

89%
+3 points since Apr 2022 poll

Non-essential international business trips



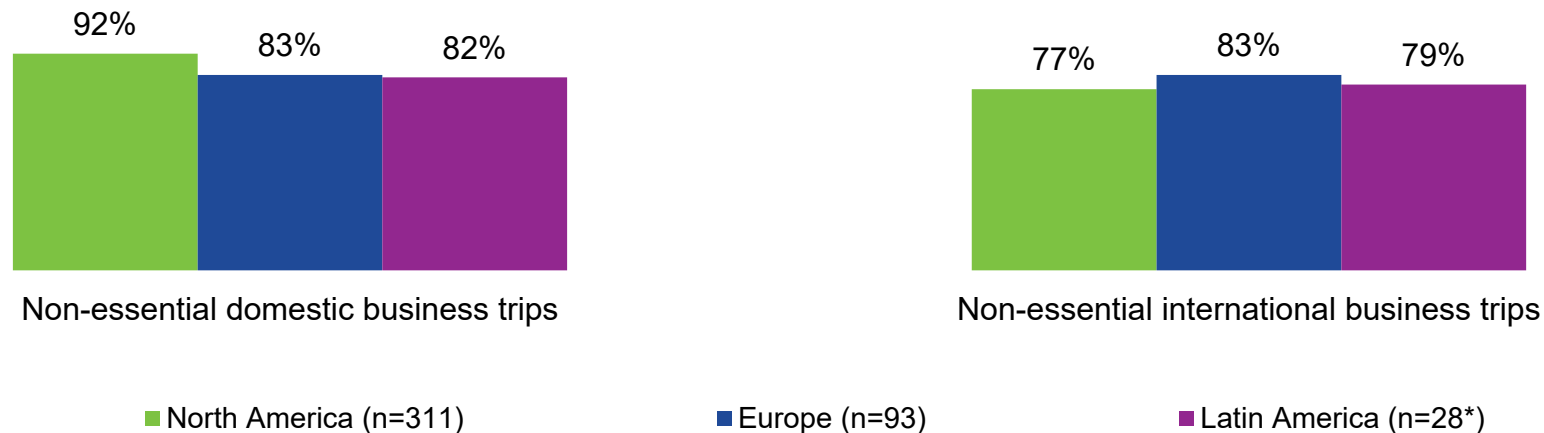
79%
+5 points since Apr 2022 poll

Q. Which of the following best describes your company's current position on employees traveling for business? (n=448-495)

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

Regardless of Region, Companies Are Back To Business Travel

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?

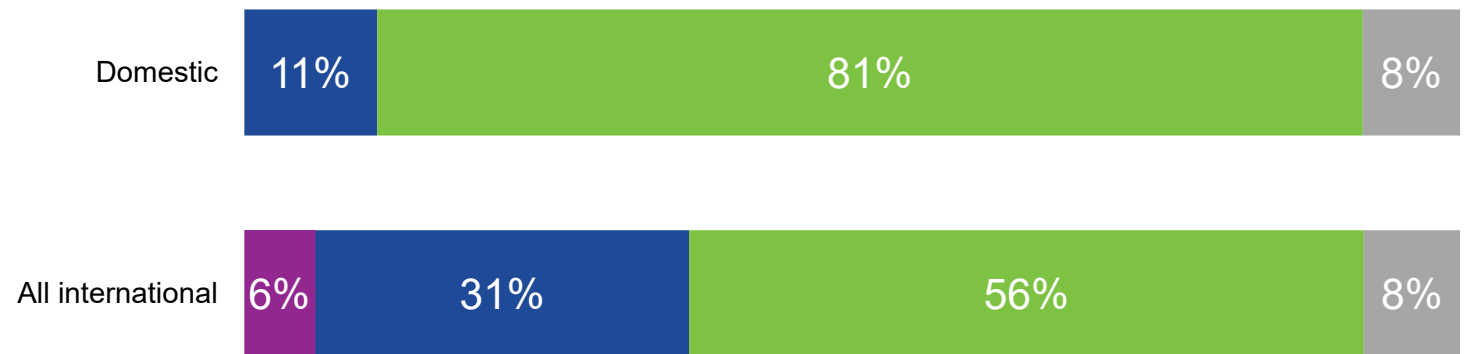
*small sample size for Latin America (n<30)

Fewer Than 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=300-357)

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=53-104)

Key Highlights



Travel Buyers Cite Current Issues Impacting Their Company's Travel Program

Which Current Affairs Have Had a "Significant" Impact on the Travel Program at your Company? – Travel Buyers Only



43%

Government policies and restrictions



33%

Staffing shortages



28%

Inflation



20%

Strength of economy/
Risk of recession



18%

Crisis in Ukraine



38%

COVID infection rates and variants



30%

Supply chain bottlenecks



27%

Oil prices



18%

Sustainability



10%

Increased wage demands

Q. What impact have the following current affairs had on the travel program at your company ?

Note: Results filtered to only show travel managers/procurement professionals (n=216-222)

Travel Suppliers Feel Staffing Shortages More Heavily

Which Current Affairs Have Had a “Significant” Impact on the Travel Program at your Company? – Travel Suppliers Only

 **51%**

Staffing shortages

 **36%**

Government policies and restrictions

 **33%**

Oil prices

 **31%**

Increased wage demands

 **17%**

Sustainability

 **37%**

Inflation

 **36%**

COVID infection rates and variants

 **33%**

Strength of economy/
Risk of recession

 **27%**

Supply chain bottlenecks

 **13%**

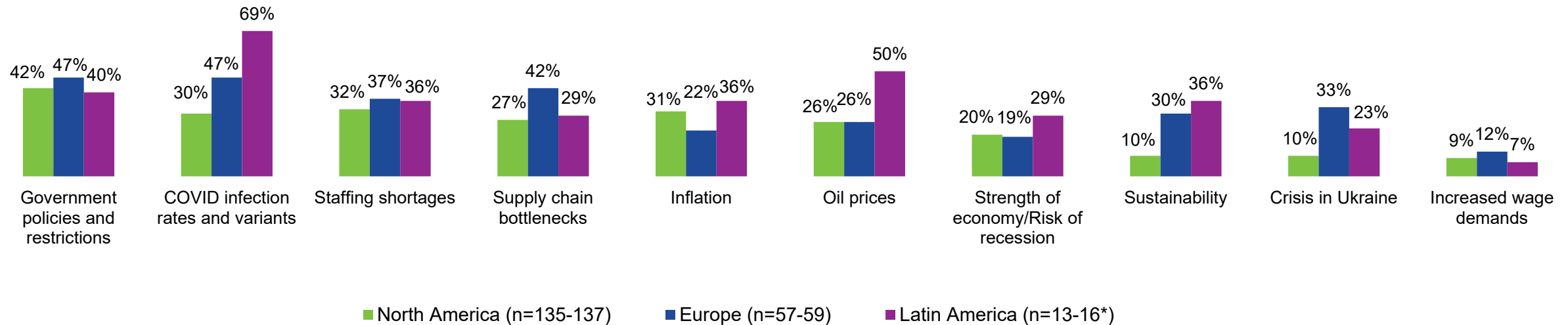
Crisis in Ukraine

Q. What impact have the following current affairs had on the travel program at your company?

Note: Results filtered to only show suppliers (n=222-225)

Issues Impacting Travel Programs by Region

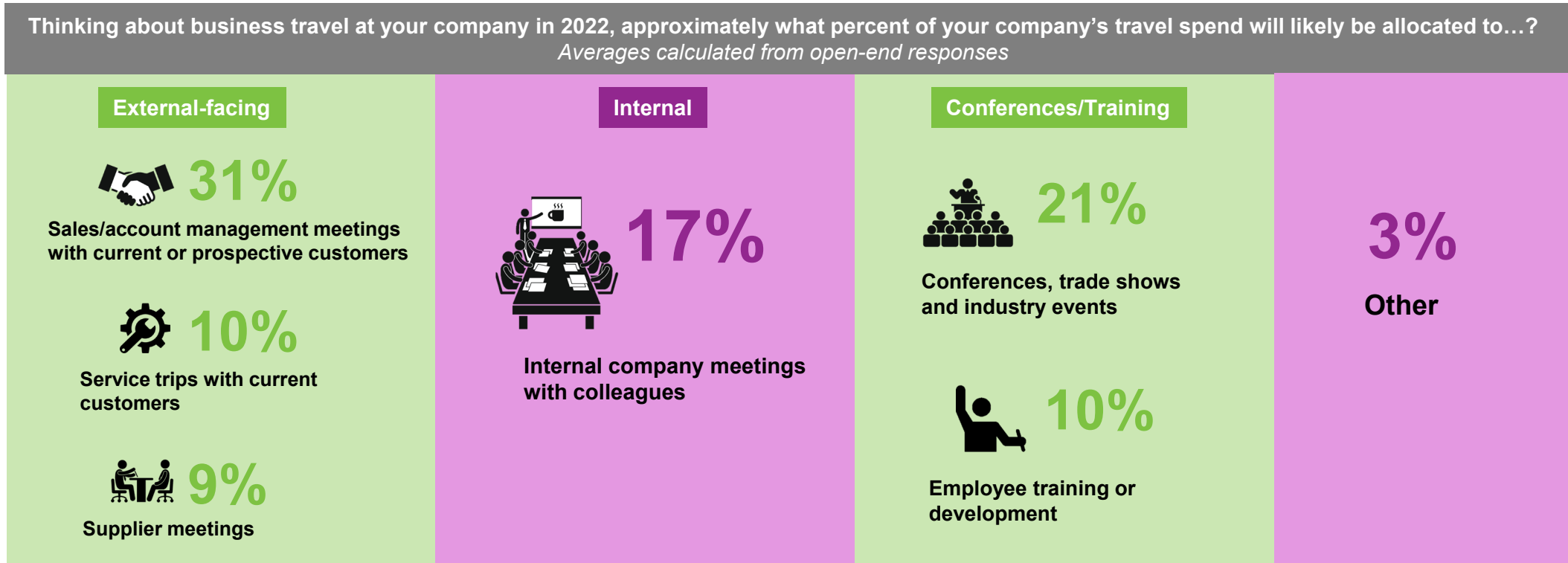
What has had a significant impact on corporate travel programs?
by region



Q. What impact have the following current affairs had on the travel program at your company?
 Note: Results filtered to only show travel managers/procurement professionals
 *indicates small sample size for Latin America (n<30)

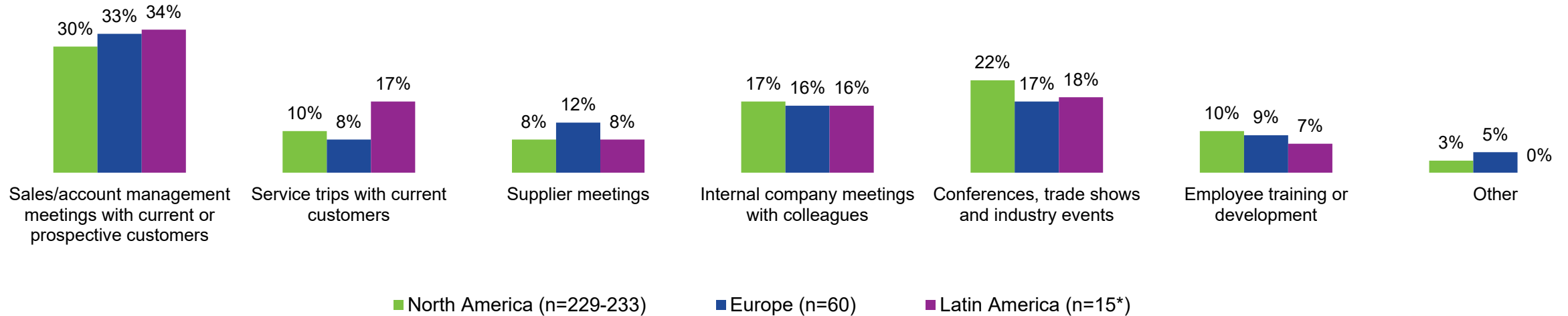


2022 Business Travel Spend: Customer Meetings, Conferences and Internal Meetings Top the List



2022 Business Travel Spend: Only Some Regional Differences When it Comes to Trip Types

Thinking about business travel at your company in 2022, approximately what percent of your company's travel spend will likely be allocated to...?
averages by region



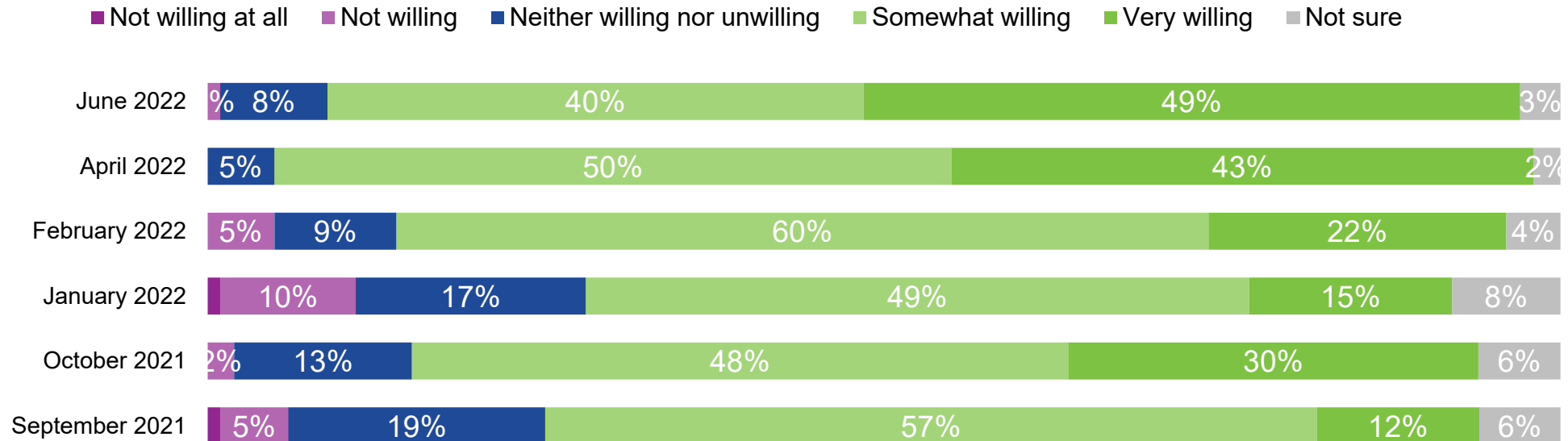
Q. Thinking about business travel at your company in 2022, approximately what percent of your company's travel spend will likely be allocated for each of these purposes?

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



Employees Continue to be 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)

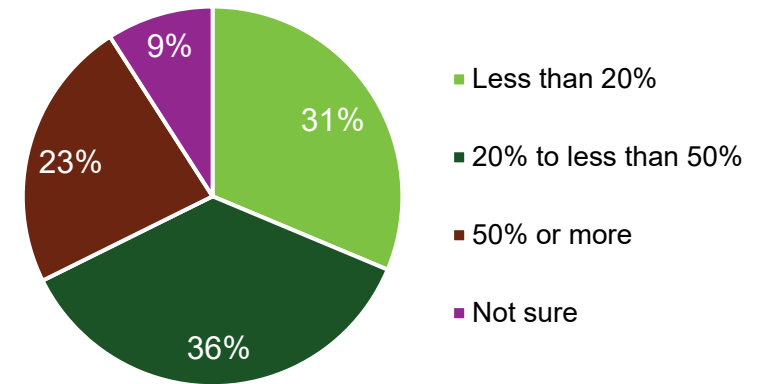
On Average, Respondents Say 33% of Their Company's Employees Have Jobs That *Require* Travel

On average, respondents estimate **33%** of employees at their company have jobs that *require* regular business travel

Note: This is an estimated average calculated using the midpoints of ranges



What percentage of employees at your company have jobs that *require* them to travel on a regular basis?

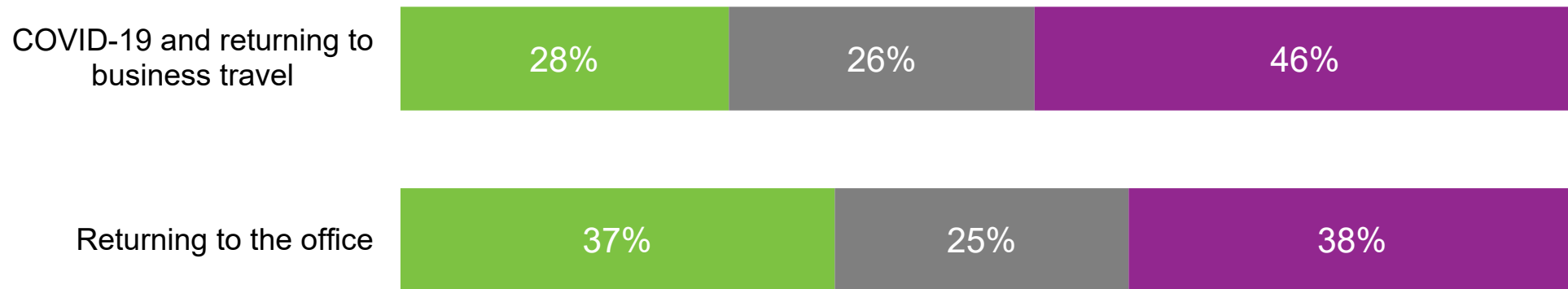


Q. Thinking about your company's workforce, approximately what percentage have jobs that require them to travel for business on a regular basis? **Examples include engineers who are required to travel to construction sites, or regional sales managers who are required to meet with clients in other cities. In some cases, these requirements are listed in job descriptions when prospective employees apply (n=390).**

Fewer Than Half Say Their Employees Have Concerns About Returning to Business Travel or the Office

How concerned are employees at your company about ...?

■ Not concerned/Not concerned at all ■ Neither concerned nor unconcerned ■ Somewhat concerned/Very concerned

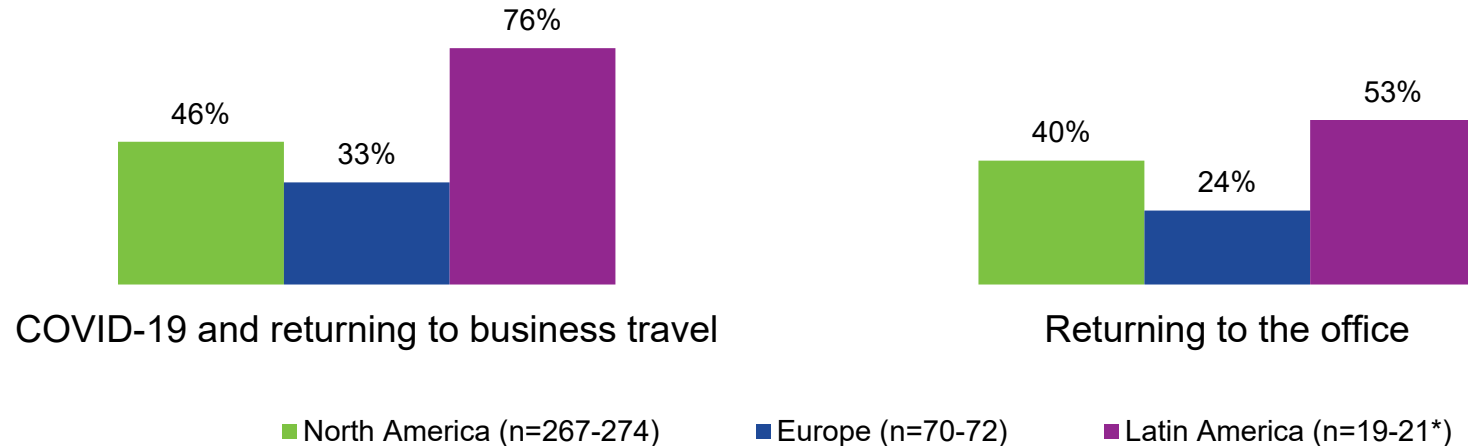


Q. How concerned are employees at your company about COVID-19 and returning to business travel? (n=377)

Q. How concerned are employees at your company about returning to the office? (n=370)

Europe-based Travel Managers Are Least Likely to Say Employees Are Concerned About Returning to Travel or the Office

How concerned are employees at your company about ...?
% "concerned" or "very concerned" by region



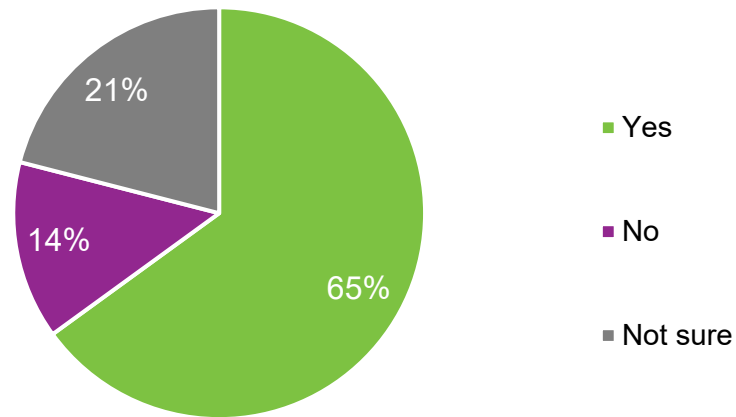
Q. How concerned are employees at your company about COVID-19 and returning to business travel?

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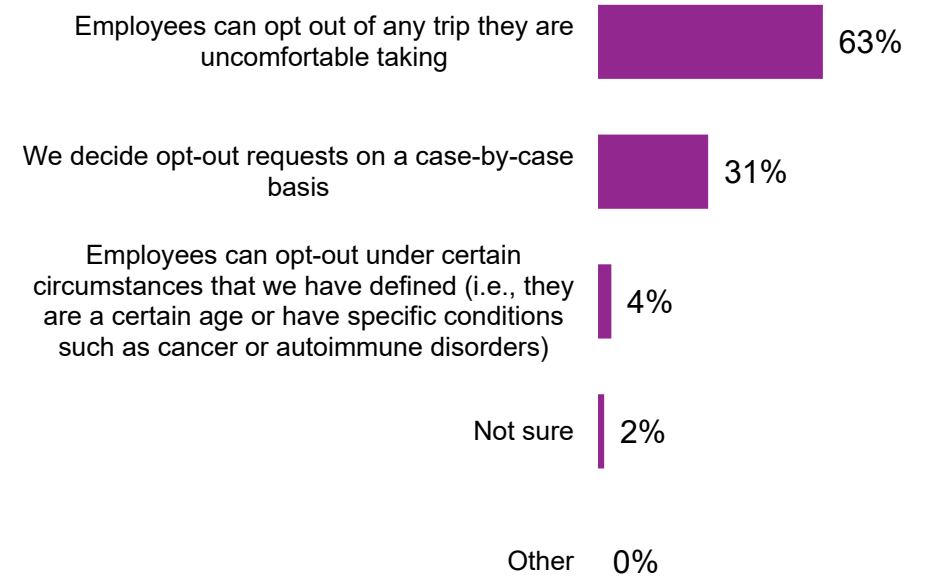
***small sample size for Latin America (n<30)**

Most Companies Have a Process for “Opting Out” of Required Business Trips

Can employees “opt out” of required business trips because of COVID-19 risks/concerns?



What does this process look like?
one answer allowed

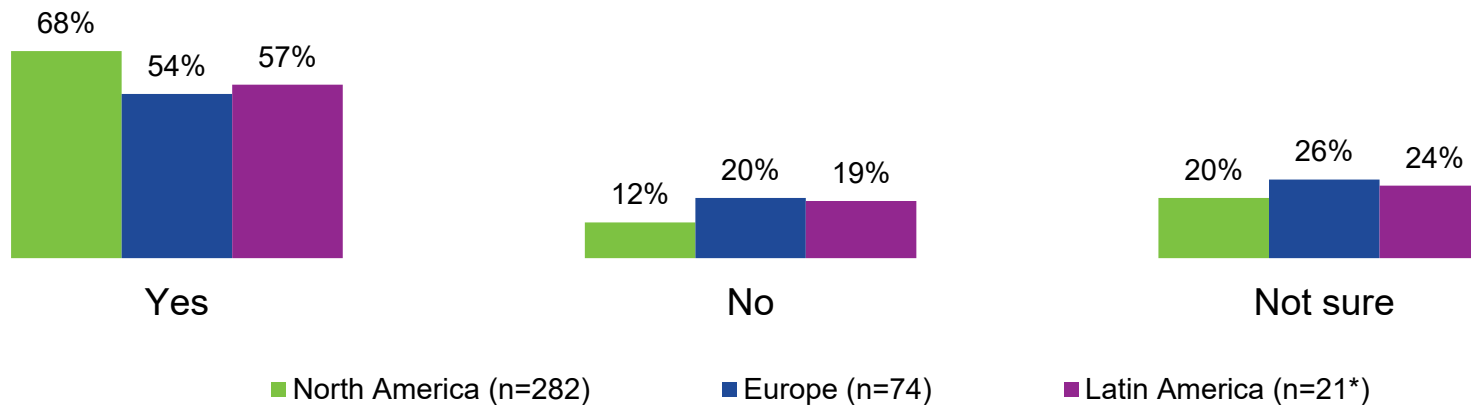


Q. Even as business travel resumes, there remains some risk from COVID-19. Thinking about your travel program, does it have a process whereby employees—such as those who are uncomfortable or have pre-existing conditions-- can request to opt-out of business trips that they would otherwise be required to take for their jobs? (n=389)

Q. You mentioned your company has an opt-out process for business travel. Which of the following best describes your process? (n=252)

Allowing “Opt-Outs” Is More Common in North America

Can employees “opt out” of required business trips because of COVID-19 risks/concerns?



Q. Even as business travel resumes, there remains some risk from COVID-19. Thinking about your travel program, does it have a process whereby employees—such as those who are uncomfortable or have pre-existing conditions-- can request to opt-out of business trips that they would otherwise be required to take for their jobs?

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