Coronavirus Recovery Poll Results
August 26, 2021
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 August 9 through August 19, 2021

• An email invitation was sent to 15,895 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, 678 companies responded to the poll

• 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
August 2021

- 78% of companies have canceled or suspended most or all domestic business trips.
- 41% of companies have canceled or suspended most or all international business trips.
- 40% plan to resume domestic business travel in the near future (1-3 months).
- 18% plan to resume international business travel in the near future (1-3 months).

Will new variants bring new clouds?
The State of Domestic Business Travel

% of companies that have canceled or suspended most or all domestic business travel within their country

Note: Small sample size for Latin America-based respondents in recent polls (n<30)
The State of Domestic Business Travel (Cont.)

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

-23 percentage points from last poll

*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 that have canceled or suspended most or all international business travel

Note: Small sample size for Latin America-based respondents in recent polls (n<30)
The State of International Business Travel (Cont.)

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

- 18% -9 percentage points from last poll

*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)
What’s the Specific Timeline?

When do companies specifically plan to resume business travel?

- **All domestic travel within your country**
  - Not yet decided: 8%
  - Already resumed: 39%
  - August 2021: 3%
  - September 2021: 8%
  - October 2021: 5%
  - November 2021: 34%
  - December 2021: 13%
  - 2022: 20%

- **All international travel**
  - Not yet decided: 19%
  - Already resumed: 9%
  - August 2021: 4%
  - September 2021: 5%
  - October 2021: 3%
  - November 2021: 22%
  - December 2021: 35%

Q. When does your company expect to resume the following types of business trips specifically? (n=571-575)
Future Bookings Stall…

How have bookings from corporate customers changed in the past week?

- **24%** Our bookings have increased
- **46%** Our bookings have remained the same
- **31%** Our bookings have decreased

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 week? (n=157)
Most Travel Buyers Say Their Company’s Travel Spend Increased in July

Q. How did your company’s travel spend change in July, 2021, compared to the prior month?

Note: Question only displayed to travel buyers/procurement professionals (n=337)
Are Employees Willing to Travel for Work?

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=290-448)
Supplier Optimism Declines From Last Month

Are suppliers optimistic about the financial prospects of companies in the business travel sector?

<table>
<thead>
<tr>
<th>Month</th>
<th>Very pessimistic</th>
<th>Pessimistic</th>
<th>Neither pessimistic nor optimistic</th>
<th>Optimistic</th>
<th>Very optimistic</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2021</td>
<td>4%</td>
<td>22%</td>
<td>38%</td>
<td>32%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>July 2021</td>
<td>6%</td>
<td>13%</td>
<td>24%</td>
<td>44%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>June 2021</td>
<td>6%</td>
<td>16%</td>
<td>22%</td>
<td>41%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>May 2021</td>
<td>3%</td>
<td>23%</td>
<td>23%</td>
<td>44%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>April 2021</td>
<td>6%</td>
<td>23%</td>
<td>17%</td>
<td>45%</td>
<td>9%</td>
<td>2%</td>
</tr>
<tr>
<td>March 2021</td>
<td>3%</td>
<td>30%</td>
<td>14%</td>
<td>42%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>February 2021</td>
<td>8%</td>
<td>36%</td>
<td>20%</td>
<td>30%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>January 2021</td>
<td>11%</td>
<td>31%</td>
<td>26%</td>
<td>28%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>December 2020</td>
<td>8%</td>
<td>32%</td>
<td>24%</td>
<td>30%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>November 2020</td>
<td>9%</td>
<td>36%</td>
<td>25%</td>
<td>22%</td>
<td>2%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? Note: Question only displayed to travel suppliers/TMCs (n=188-332)
Key Highlights
Most Companies Have Resumed at Least Some Non-Essential Business Trips

Q. Which of the following best describes your company's current position on employees traveling for business? (n=584-622)

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

<table>
<thead>
<tr>
<th>Company’s current position on employees traveling for business</th>
<th>Non-essential domestic business trips</th>
<th>Non-essential international business trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not allowed</td>
<td>23%</td>
<td>49%</td>
</tr>
<tr>
<td>Rarely allowed</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>Sometimes allowed</td>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>Usually allowed</td>
<td>33%</td>
<td>11%</td>
</tr>
</tbody>
</table>

60% (% sometimes + usually allowed) 28%
Widespread Concern About the Impact of COVID-19 Variants on Business Travel

Are respondents concerned about the Delta variant/other variants when it comes to…?

- Not concerned
- Not concerned at all
- Neither concerned nor unconcerned
- Concerned
- Very concerned

Revenue impact to companies in the business travel sector:
- 3% Not concerned
- 11% Not concerned at all
- 49% Neither concerned nor unconcerned
- 36% Concerned
- 3% Very concerned
- 85% % concerned + very concerned

Employment and (re)hiring in the business travel sector:
- 3% Not concerned
- 5% Not concerned at all
- 14% Neither concerned nor unconcerned
- 48% Concerned
- 31% Very concerned
- 79% % concerned + very concerned

The safety of business travel:
- 4% Not concerned
- 7% Not concerned at all
- 10% Neither concerned nor unconcerned
- 50% Concerned
- 28% Very concerned
- 78% % concerned + very concerned

Q. Please rate your concern about the impact of the Delta variant / new variants and the growing number of coronavirus cases in many countries when it comes to… (n=615-616)
Q. Please rate your concern about the impact of the Delta variant / new variants and the growing number of coronavirus cases in many countries when it comes to…

**Travel Managers/ Procurement (n=354-355)**

- **Revenue impact to companies in business travel sector**: 79% concerned / very concerned
- **Employment and re(hiring) in the business travel sector**: 76% concerned / very concerned
- **The safety of business travel**: 83% concerned / very concerned

**Travel Suppliers/ TMCs (n=222-224)**

- **Revenue impact to companies in business travel sector**: 93% concerned / very concerned
- **Employment and re(hiring) in the business travel sector**: 82% concerned / very concerned
- **The safety of business travel**: 72% concerned / very concerned
Only 1 in 5 Travel Managers/Procurement Professionals Say Their Company Has Introduced New Restrictions on Business Travel – Though Others Are Considering

Q. In the past month, has your company introduced new restrictions on non-essential business travel specifically as a result of the Delta variant (or other variants) and/or the growing number of coronavirus cases in many countries? **Note: Question only displayed to travel managers/procurement professionals (n=345)**
For Companies That Still Have Not Resumed Business Travel, Variants Could Delay Plans

Are the Delta variant or other variants likely to delay the return to business travel?

*among companies that “never” or “rarely” allow currently*

<table>
<thead>
<tr>
<th></th>
<th>Not likely</th>
<th>Not likely at all</th>
<th>Neither likely nor unlikely</th>
<th>Likely</th>
<th>Very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-essential domestic business trips</td>
<td>3%</td>
<td>8%</td>
<td>9%</td>
<td>37%</td>
<td>44%</td>
</tr>
<tr>
<td>Non-essential international business trips</td>
<td>4%</td>
<td>7%</td>
<td>10%</td>
<td>35%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Q. Thinking about the Delta variant / other variants and the growing number of coronavirus cases in many countries, please rate the likelihood that these will delay your company’s plans to resume non-essential business travel. **Note: Question only displayed to travel buyers/procurement professionals. Respondents only asked about the types of travel which their company “never” or “rarely” allows currently. (n=153-256)**
New Variants Could Hurt Corporate Meetings and Events

As a result of new variants, have travel programs canceled or suspended the following types of business travel?  
*multiple answers allowed*

<table>
<thead>
<tr>
<th>Type of Travel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large in-person meeting, event, or conference (more than 500 attendees)</td>
<td>78%</td>
</tr>
<tr>
<td>Attending a medium-sized meeting, event, or conference (51-500 attendees)</td>
<td>76%</td>
</tr>
<tr>
<td>Internal collaboration (i.e., traveling to work at another company office or site; traveling to work with coworkers at another location)</td>
<td>71%</td>
</tr>
<tr>
<td>Attending a small meeting, event, or conference (50 attendees or fewer)</td>
<td>68%</td>
</tr>
<tr>
<td>Sales/account management trips (i.e., traveling to visit a client, customer, or sales prospect)</td>
<td>41%</td>
</tr>
<tr>
<td>Service trips (e.g., consultants traveling to visit clients; blue-collar employees traveling to work on a job site)</td>
<td>35%</td>
</tr>
</tbody>
</table>

Q. Due to the impact of the Delta variant / other variants and its rapid spread around the globe, has your company postponed or canceled employee business travel to attend the following types of meetings or events? Please select all that apply. Note: Question only displayed to travel buyers/procurement professionals (n=248).
Most Respondents Still Say Their Company Will Not Require Vaccines for Business Travel

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yes (%)</th>
<th>No (%)</th>
<th>Not sure (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel for business internationally</td>
<td>25</td>
<td>51</td>
<td>24</td>
</tr>
<tr>
<td>Attend large (more than 500 attendees) meetings, conferences, or events</td>
<td>22</td>
<td>49</td>
<td>29</td>
</tr>
<tr>
<td>Meet with clients and customers face-to-face</td>
<td>22</td>
<td>53</td>
<td>25</td>
</tr>
<tr>
<td>Travel for business domestically</td>
<td>21</td>
<td>56</td>
<td>23</td>
</tr>
<tr>
<td>Work from company offices/job sites</td>
<td>20</td>
<td>55</td>
<td>25</td>
</tr>
</tbody>
</table>

Q. Does (or will) your company require employees to receive a COVID-19 vaccine before they can do the following in the future? (n=587-590)
## Variants Have Not Yet Prompted Most Companies to Rethink Plans

Have companies altered the following plans because of the Delta variant/other variants?

<table>
<thead>
<tr>
<th>Plans</th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office reopening</td>
<td>38%</td>
<td>54%</td>
<td>7%</td>
</tr>
<tr>
<td>International business travel</td>
<td>36%</td>
<td>55%</td>
<td>9%</td>
</tr>
<tr>
<td>All business travel, both domestic and international</td>
<td>32%</td>
<td>60%</td>
<td>8%</td>
</tr>
<tr>
<td>Domestic business travel</td>
<td>28%</td>
<td>66%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q. Has your company altered its plans for the following due to the spread of the Delta variant and/or other variants? (n=593-606)
Most Respondents Say Their Company Has Contact Tracing Procedures If Employees Become Infected With COVID-19

Do companies have contact tracing procedures if employees become infected with COVID-19?

- Yes: 21%
- No: 79%

Q. Does your company have procedures in place for contact tracing should an employee become infected with Covid-19 or the Delta variant / other variants? (n=491)
Despite Rising Cases, Respondents Remain Optimistic About a Fall Recovery

How do respondents feel about the September-November timeframe (compared to June-August)?

- Business travel will see a significant increase in September – November (compared to the June- August timeframe) (8%)
- Business travel will see a moderate increase in September – November (compared to the June-August timeframe) (5%)
- Business travel will remain flat in September – November (compared to the June-August timeframe) (31%)
- Business travel will see a moderate decrease in September – November (compared to the June-August timeframe) (5%)
- Business travel will see a significant decrease in September – November (compared to the June-August timeframe) (47%)

Q. Thinking ahead to the September-November timeframe this year, which of the following best describes your view? (n=594)
Travel Suppliers Concerned New Variants Will Hurt Revenue

How will new variants your company’s revenue from business travel?
travel suppliers/TMC employees

- 2% It will not have an impact at all
- 13% It will have a slightly negative impact
- 37% It will have a moderately negative impact
- 44% It will have a very negative impact
- 4% Not sure

Q. You indicated you work for a travel supplier or TMC. To what extent do you believe the Delta variant/other variants and the growing number of coronavirus cases in many countries will impact your revenue from business travelers and corporate travel customers? Note: Question only displayed to travel suppliers/TMC employees (n=219)
Many Suppliers Change Operations/Safety Protocols

Have travel suppliers changed their operations/safety protocols as a result of new variants?

- We have already changed our operations/safety protocols: 49%
- We are likely to change our operations/safety protocols: 27%
- We are unlikely to change our operations/safety protocols: 24%

Q. You indicated you work for a travel supplier or TMC. Thinking about the company you work for, to what extent has your company changed its operations or safety protocols specifically as a result of the Delta variant/other variants and the growing number of coronavirus cases in many countries? Examples include re-introducing mask requirements, changing capacity limits, or closing public spaces such as airport lounges or hotel restaurants. Note: Question only displayed to travel suppliers/TMC employees (n=219)
2 in 5 Companies Plan to Resume Domestic Business Travel in the Near Future

Q. Thinking about your company, how has the coronavirus impacted business travel to...? (n=505-549)

41% of companies have canceled or suspended most (31%) or all (10%) domestic travel within their own country.

78% of companies have canceled or suspended most (44%) or all (34%) international 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. 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=220-290)