

Coronavirus Recovery Poll Results

August 26, 2021

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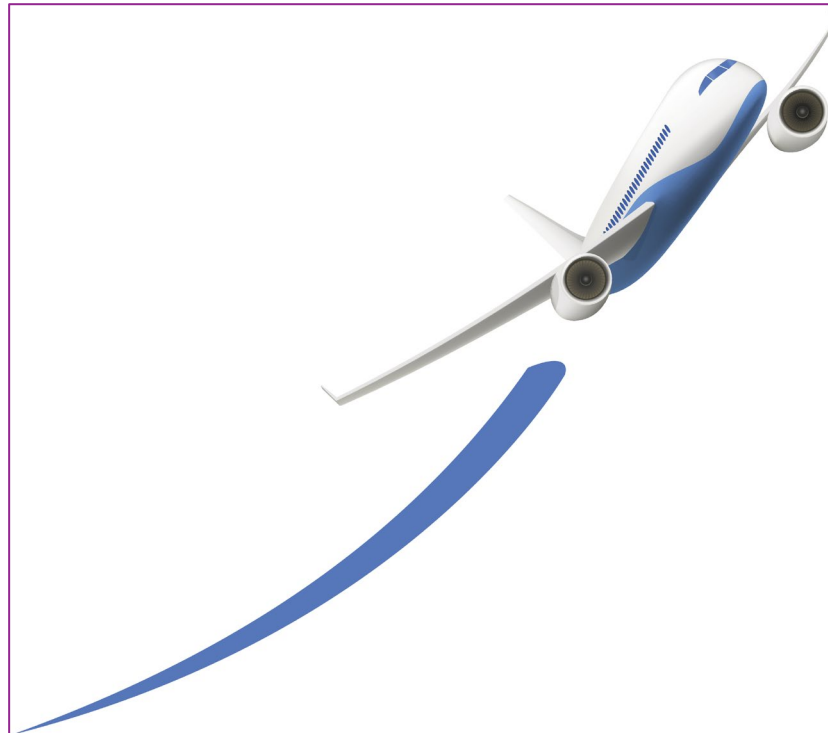


Methodology

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

- Fielding took place from 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

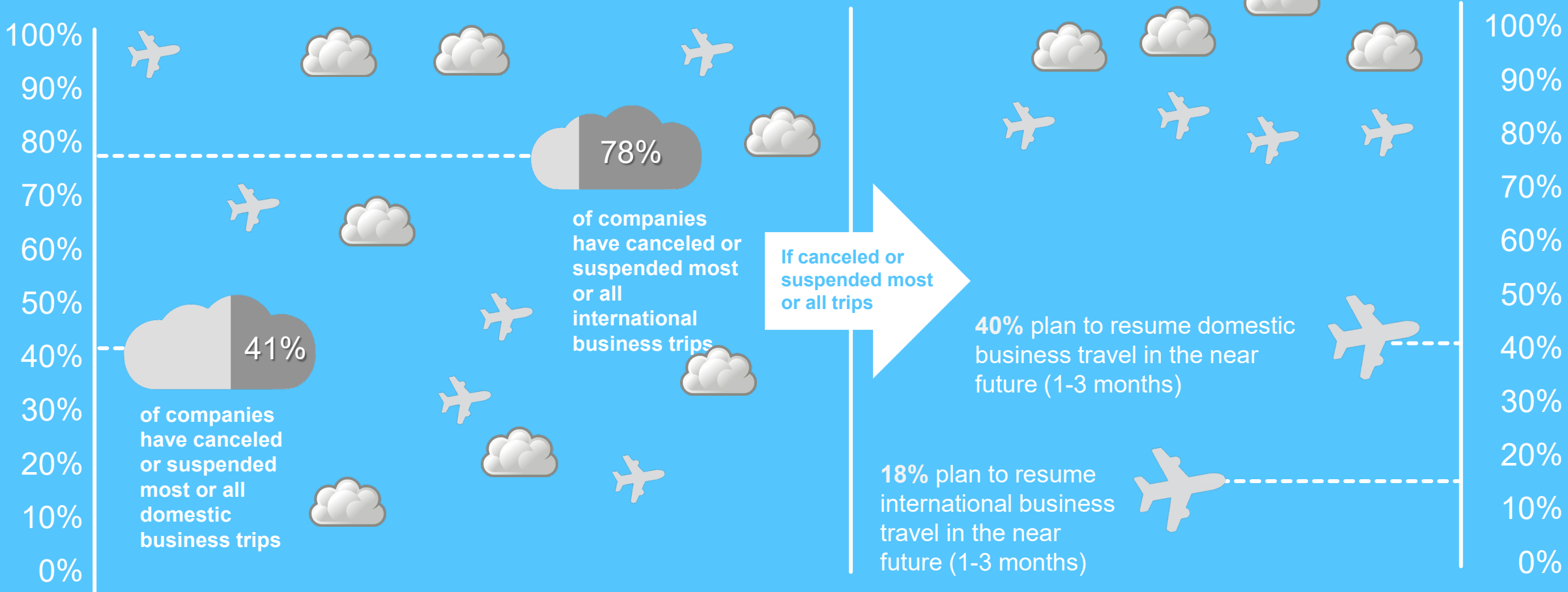
The State of Business Travel





The State of Business Travel

August 2021



41%
of companies
have canceled
or suspended
most or all
domestic
business trips

78%
of companies
have canceled or
suspended most
or all
international
business trips

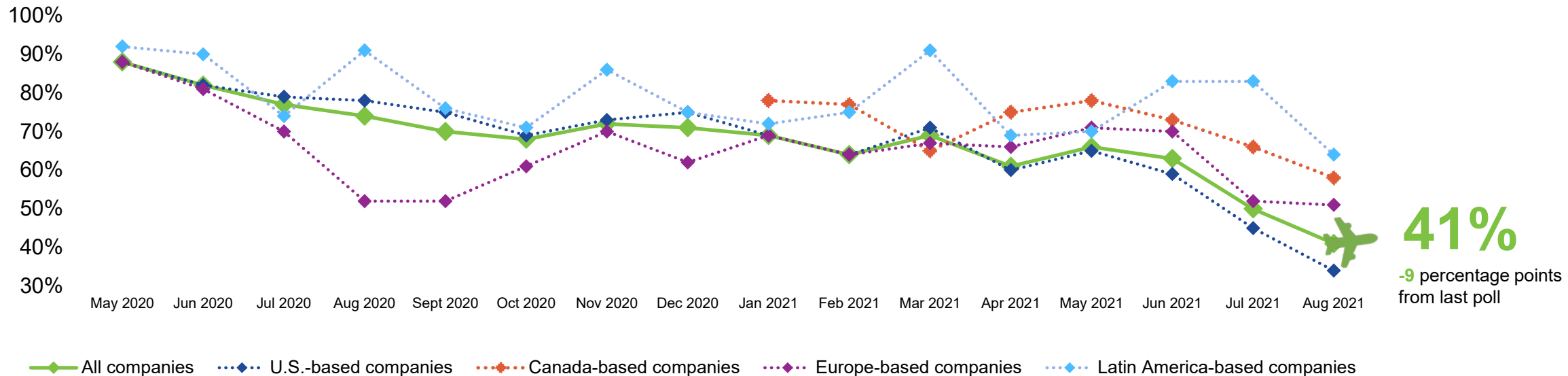
If canceled or
suspended most
or all trips

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)

The State of Domestic Business Travel

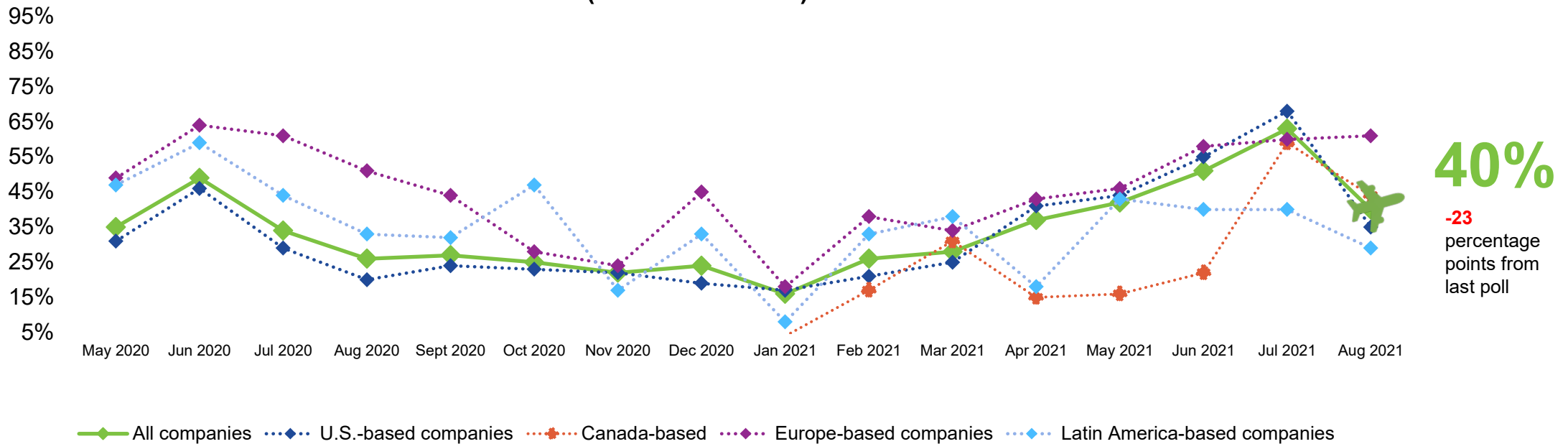
% of companies that have canceled or suspended most or all domestic business travel within their country



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

The State of Domestic Business Travel (Cont.)

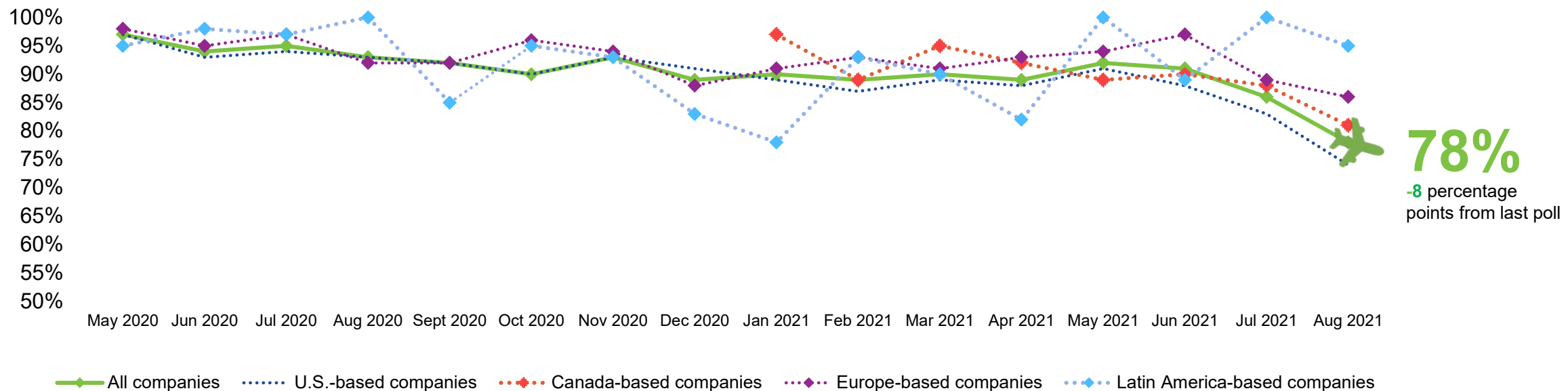
% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*



*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

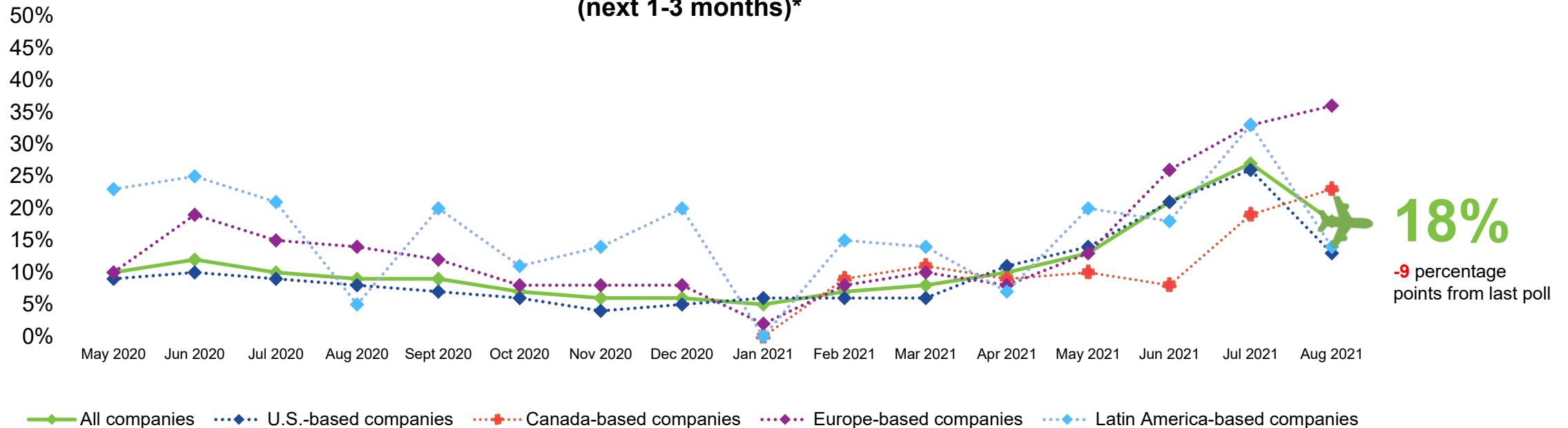
% of companies that have canceled or suspended most or all international business travel



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

The State of International Business Travel (Cont.)

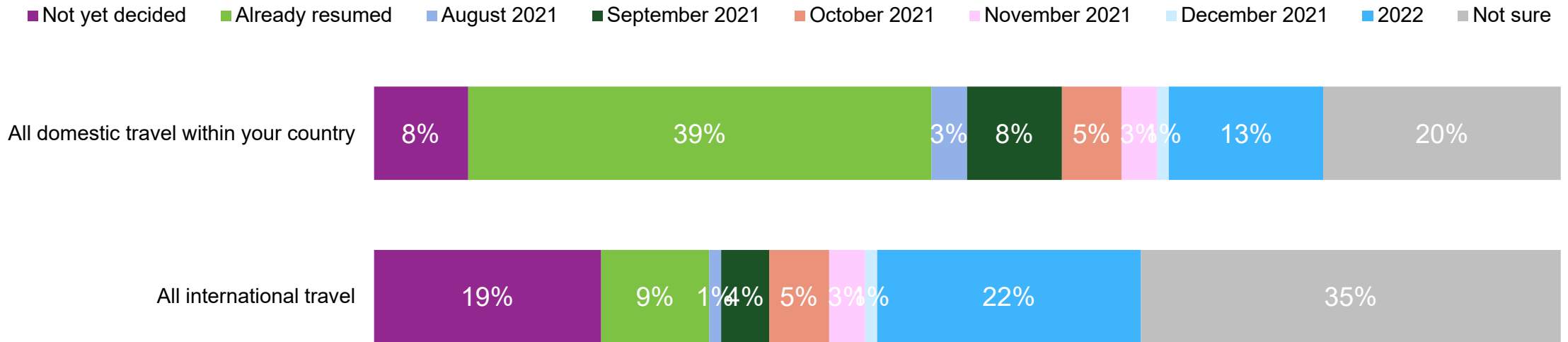
% of companies that plan to resume international business travel in the near future (next 1-3 months)*



*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?

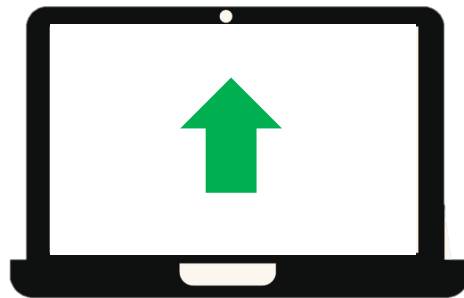
When do companies specifically plan to resume business travel?



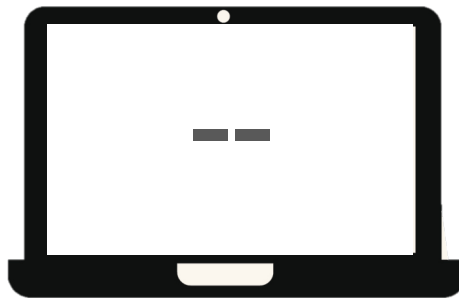
Q. When does your company expect to resume the following types of business trips specifically? (n=571-575)

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

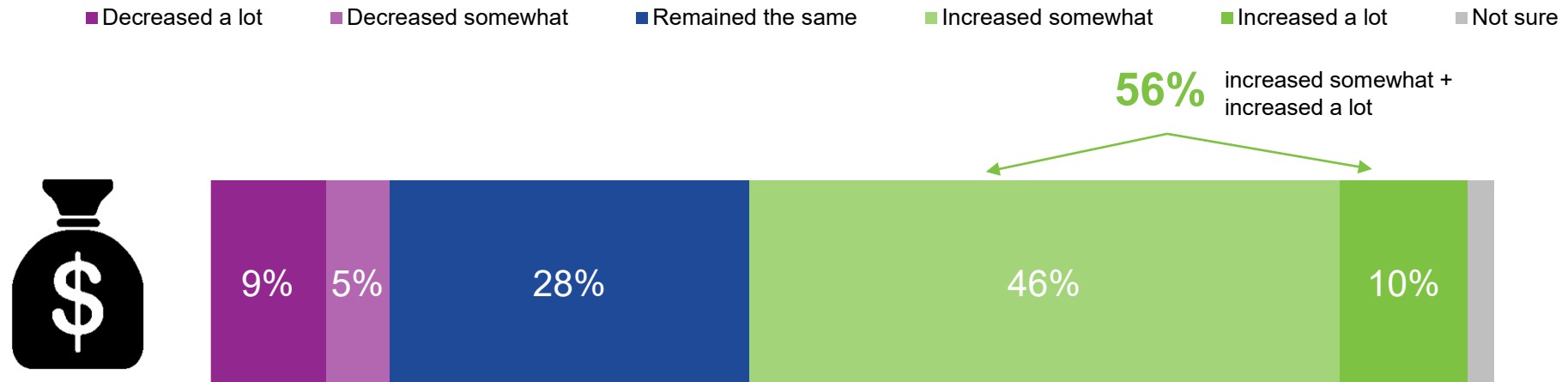


31% Our bookings have decreased

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

Most Travel Buyers Say Their Company's Travel Spend Increased in July

How did company travel spend change in July?

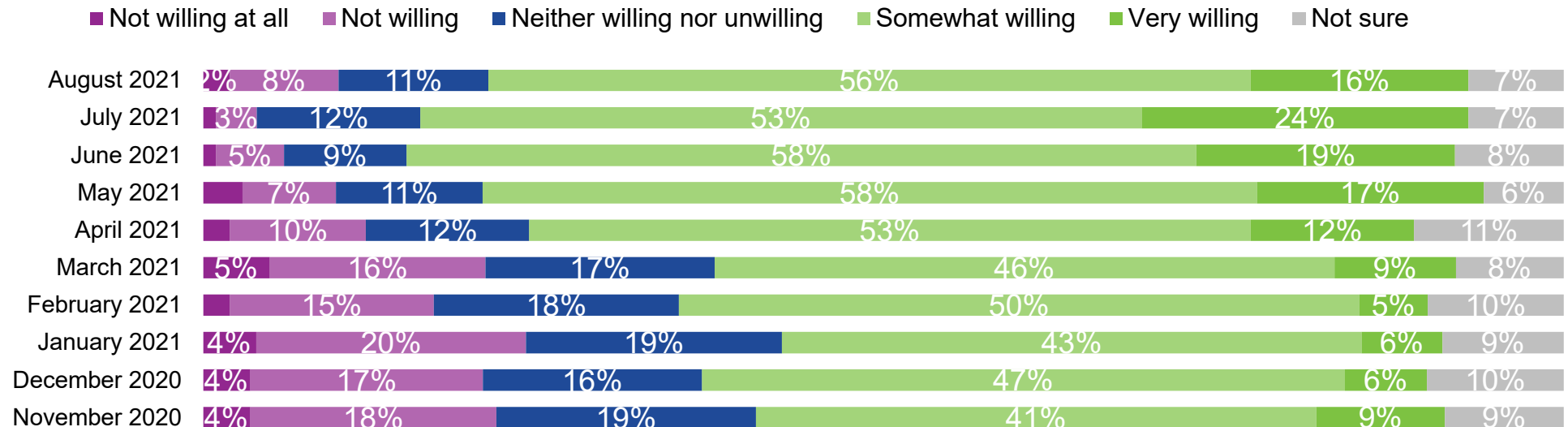


Q. How did your company's travel spend change in July, 2021, compared to the prior month?

Note: Question only displayed to travel buyers/procurement professionals (n=337)

Are Employees Willing to Travel for Work?

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

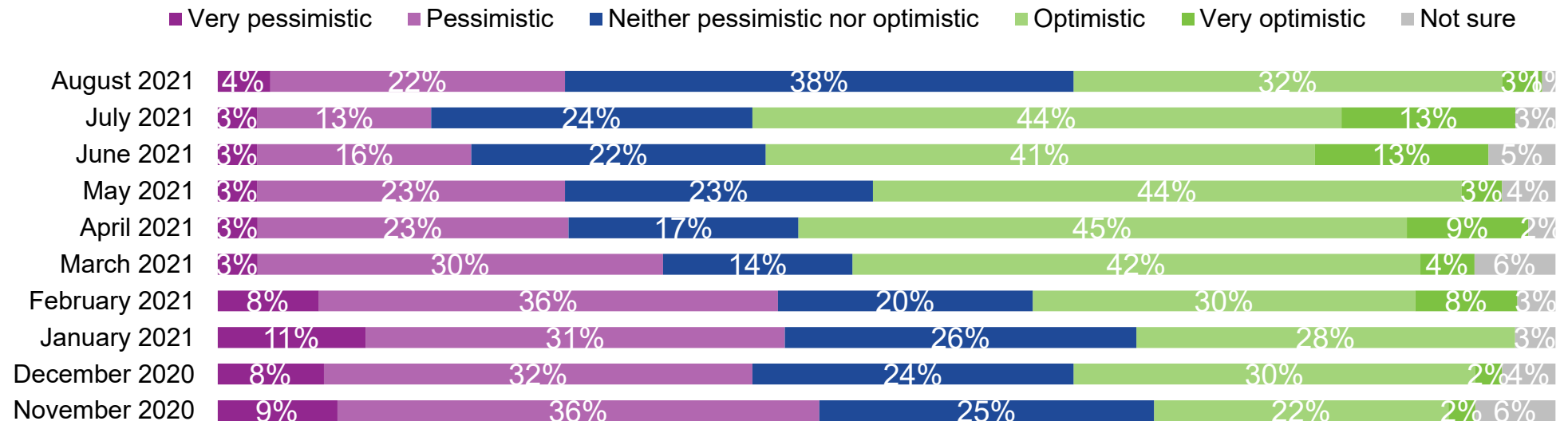


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=290-448)

Supplier Optimism Declines From Last Month

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



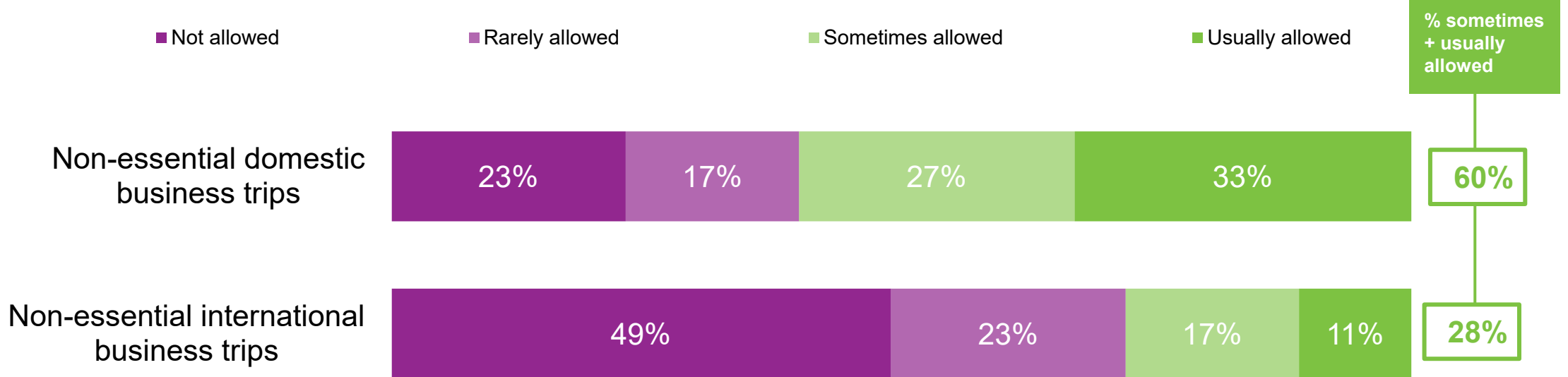
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=188-332)**

Key Highlights



Most Companies Have Resumed at Least Some Non-Essential Business Trips

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=584-622)

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

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

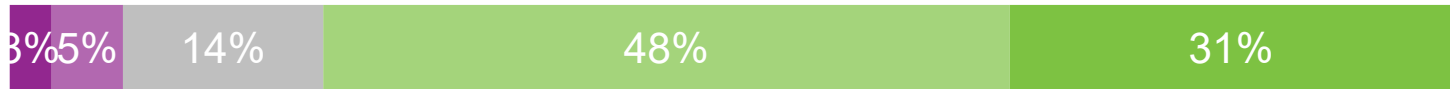
% concerned + very concerned

Revenue impact to companies in the business travel sector



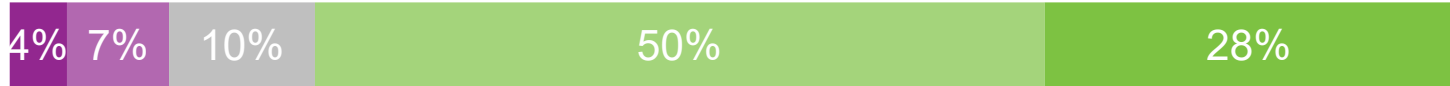
85%

Employment and (re)hiring in the business travel sector



79%

The safety of business travel



78%

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)

Buyer/Supplier Breakout



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

% concerned/ very
concerned about new
variants when it comes to...



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

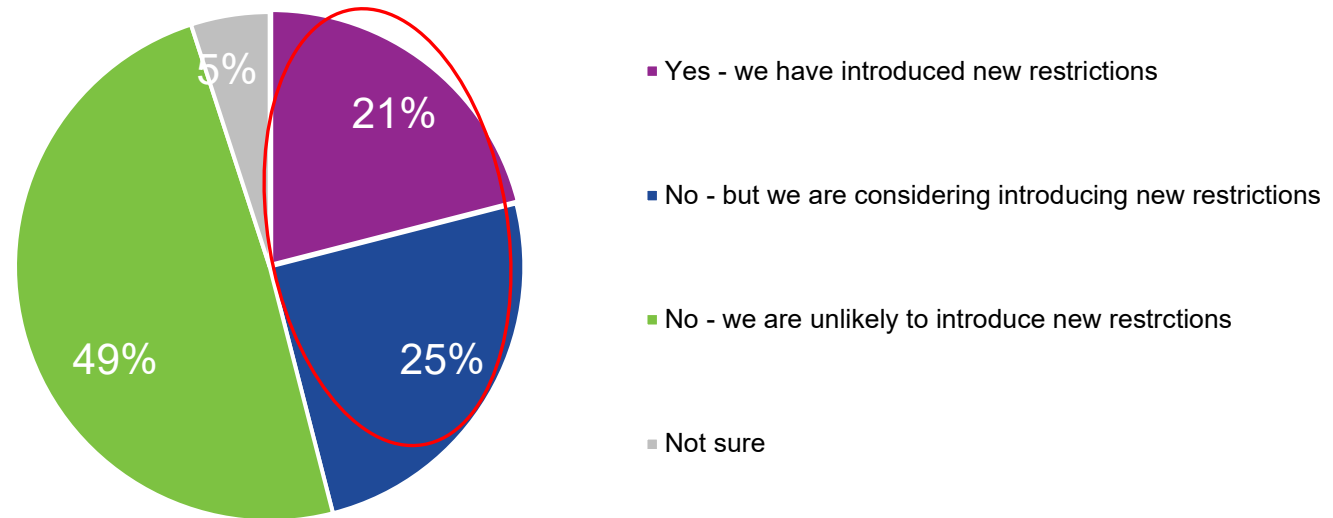


Q. Please rate your concern about the impact of the Delta variant / new variants and the growing number of coronavirus cases in many countries when it comes to...

Only 1 in 5 Travel Managers/Procurement Professionals Say Their Company Has Introduced New Restrictions on Business Travel – Though Others Are Considering



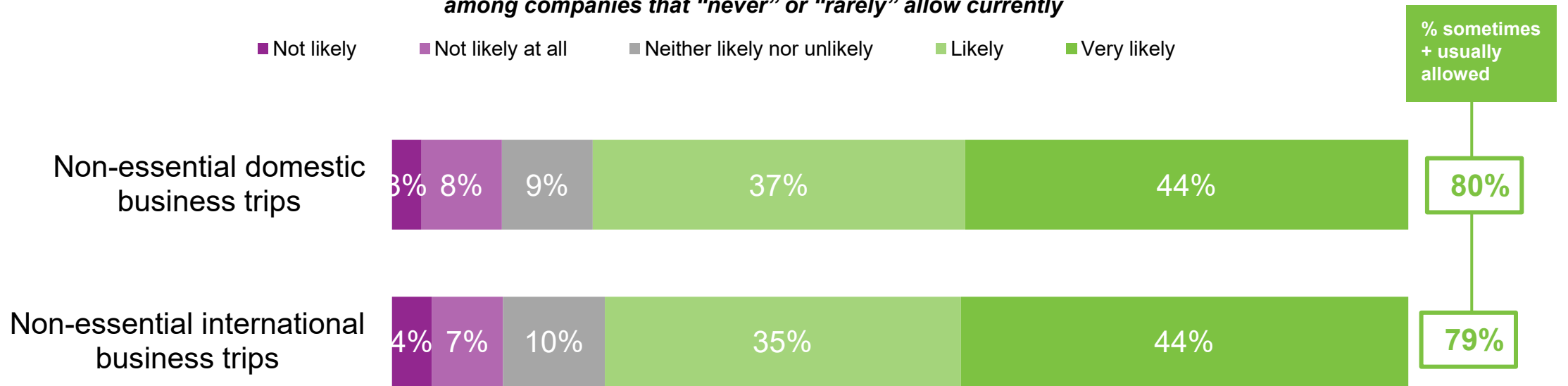
Have companies introduced new restrictions on non-essential business travel as a result of new variants?



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

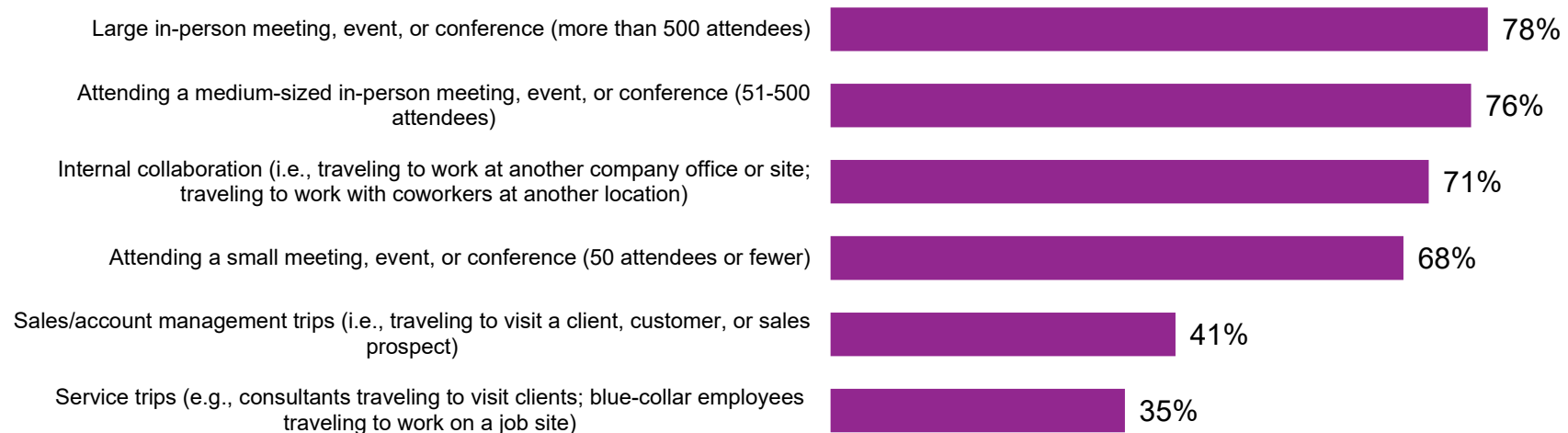
Are the Delta variant or other variants likely to delay the return to business travel?
among companies that “never” or “rarely” allow currently



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

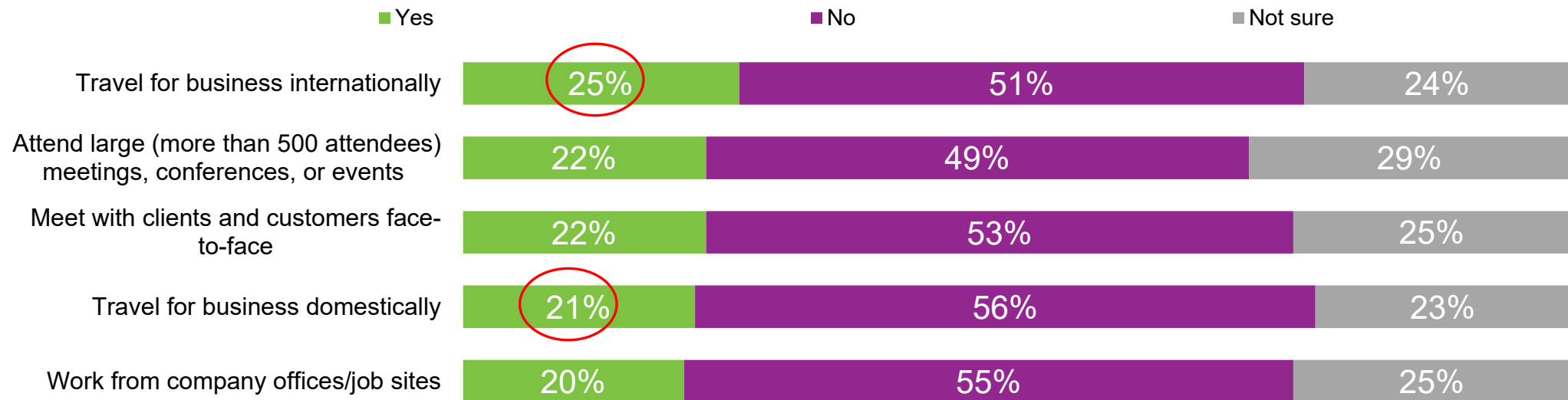
As a result of new variants, have travel programs canceled or suspended the following types of business travel?
multiple answers allowed



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

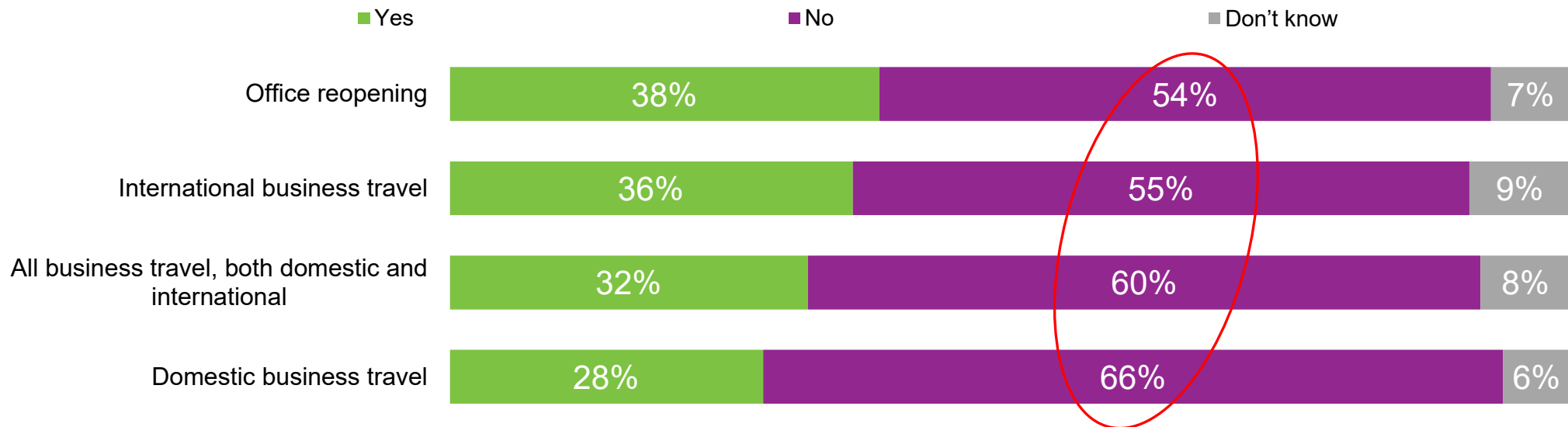
Will your company require employees to receive a COVID-19 vaccine before they can...?



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

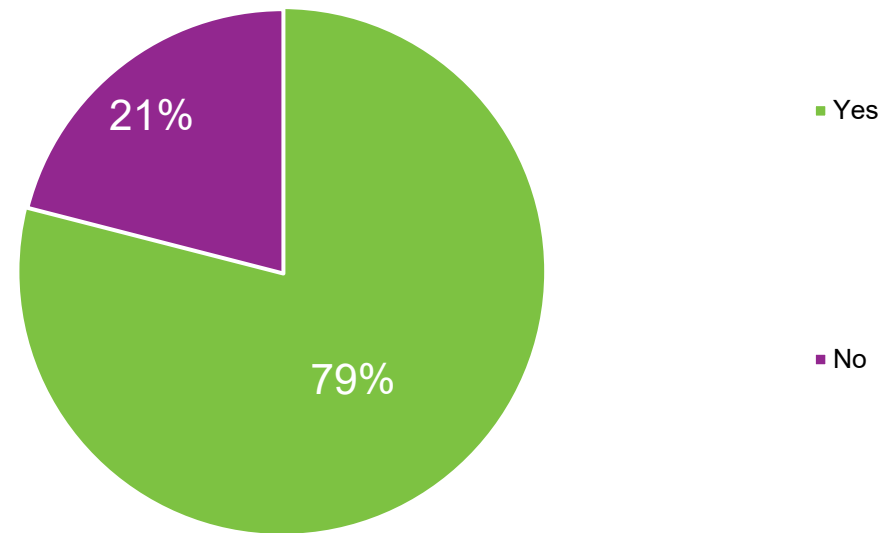
Have companies altered the following plans because of the Delta variant/other variants?



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?

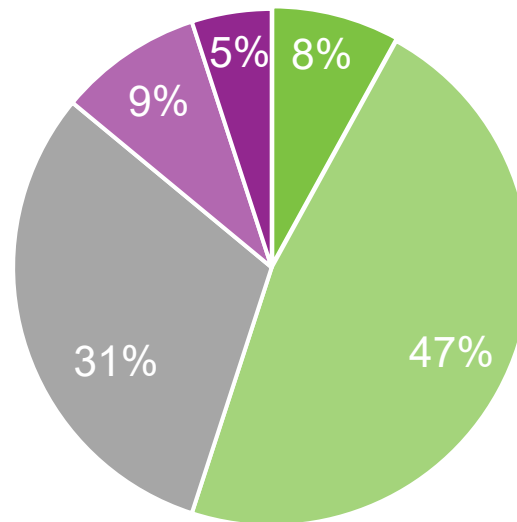


Q. Does your company have procedures in place for contact tracing should an employee become infected with Covid-19 or the Delta variant / other variants? (n=491)

Despite Rising Cases, Respondents Remain Optimistic About a Fall Recovery



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



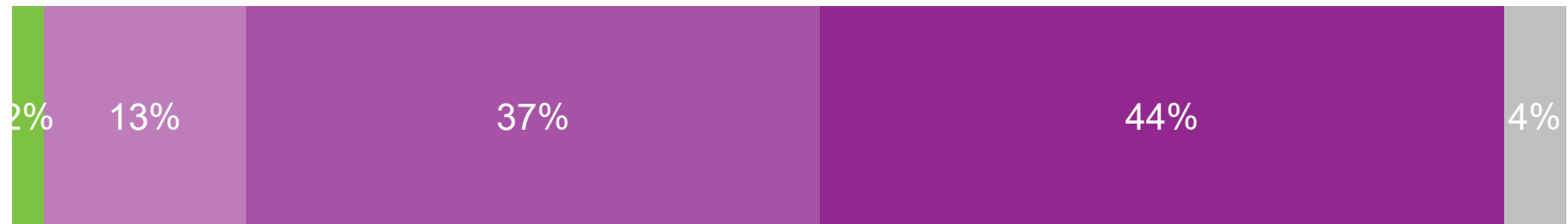
- Business travel will see a significant increase in September – November (compared to the June- August timeframe)
- Business travel will see a moderate increase in September – November (compared to the June- August timeframe)
- Business travel will remain flat in September – November (compared to the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

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

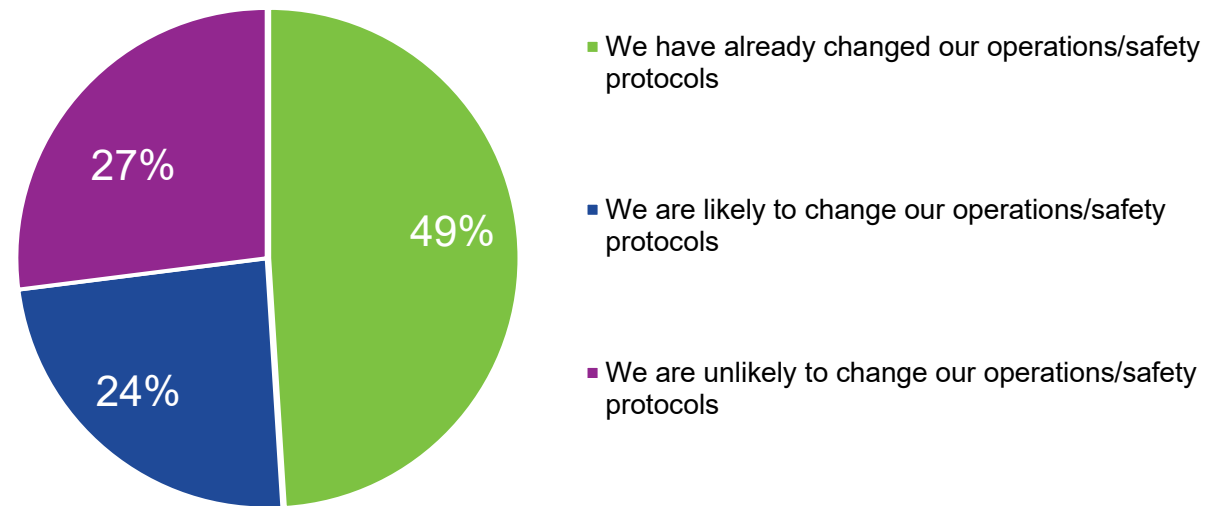
■ It will not have an impact at all ■ It will have a slightly negative impact ■ It will have a moderately negative impact ■ It will have a very negative impact ■ Not sure



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?



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

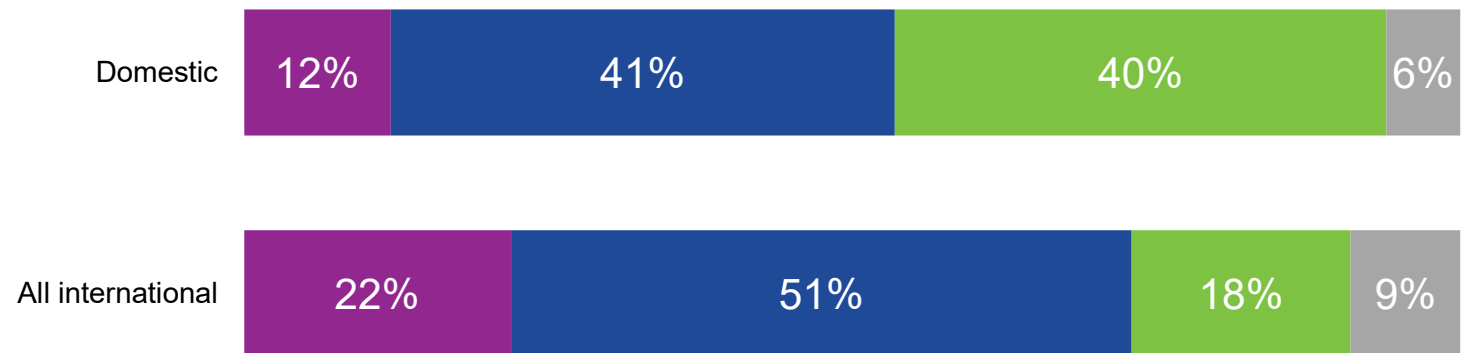
 **78%**
of companies have canceled or suspended **most** (44%) or **all** (34%) international trips

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



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)

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