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 September 7 - 16, 2021
- An email invitation was sent to 15,914 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, 606 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
September 2021

- 77% of companies have canceled or suspended most or all international business trips.
- 38% of companies have canceled or suspended most or all domestic business trips.

If canceled or suspended most or all trips:
- 28% 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).

Similar picture as last month.
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)*

- All companies
- U.S.-based companies
- Canada-based companies
- Europe-based companies
- Latin America-based companies

*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?

<table>
<thead>
<tr>
<th></th>
<th>Not yet decided but in discussion</th>
<th>Already resumed</th>
<th>September 2021</th>
<th>October 2021</th>
<th>November 2021</th>
<th>December 2021</th>
<th>2022</th>
<th>Not sure</th>
</tr>
</thead>
</table>

### All domestic travel within your country

- Total respondents: 505-508

- **10%** Not yet decided but in discussion
- **43%** Already resumed
- **2%** September 2021
- **6%** October 2021
- **32%** November 2021
- **17%** December 2021
- **18%** 2022
- **18%** Not sure

### All international travel

- **16%** Not yet decided but in discussion
- **15%** Already resumed
- **2%** September 2021
- **3%** October 2021
- **6%** November 2021
- **26%** December 2021
- **37%** 2022
- **18%** Not sure

Q. When does your company expect to resume the following types of business trips specifically? (n=505-508)
For Some Travel Suppliers, Future Bookings Continue to Drop…

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

<table>
<thead>
<tr>
<th>Month</th>
<th>Our bookings have decreased</th>
<th>Our bookings have remained the same</th>
<th>Our bookings have increased</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 2021</td>
<td>38%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>August 2021</td>
<td>31%</td>
<td>46%</td>
<td>24%</td>
</tr>
<tr>
<td>July 2021</td>
<td>3%</td>
<td>27%</td>
<td>70%</td>
</tr>
<tr>
<td>June 2021</td>
<td>6%</td>
<td>32%</td>
<td>62%</td>
</tr>
<tr>
<td>May 2021</td>
<td>10%</td>
<td>36%</td>
<td>54%</td>
</tr>
</tbody>
</table>

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=139-158) **Note:** Before September 2021, this question asked how about how bookings changed in the past week.
Are Employees Willing to Travel for Work?

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

<table>
<thead>
<tr>
<th>Month</th>
<th>Not willing at all</th>
<th>Not willing</th>
<th>Neither willing nor unwilling</th>
<th>Somewhat willing</th>
<th>Very willing</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 2021</td>
<td>5%</td>
<td>19%</td>
<td>57%</td>
<td>12%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>August 2021</td>
<td>2%</td>
<td>8%</td>
<td>11%</td>
<td>56%</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>July 2021</td>
<td>3%</td>
<td>12%</td>
<td>53%</td>
<td>24%</td>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>June 2021</td>
<td>5%</td>
<td>9%</td>
<td>58%</td>
<td>17%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>May 2021</td>
<td>7%</td>
<td>11%</td>
<td>58%</td>
<td>12%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>April 2021</td>
<td>10%</td>
<td>12%</td>
<td>53%</td>
<td>12%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>March 2021</td>
<td>15%</td>
<td>16%</td>
<td>17%</td>
<td>46%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>February 2021</td>
<td>10%</td>
<td>15%</td>
<td>18%</td>
<td>50%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>January 2021</td>
<td>4%</td>
<td>20%</td>
<td>19%</td>
<td>43%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>December 2020</td>
<td>4%</td>
<td>17%</td>
<td>16%</td>
<td>47%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>November 2020</td>
<td>4%</td>
<td>18%</td>
<td>19%</td>
<td>41%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

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/prourement professionals (n=278-448)
Supplier Optimism Remains Muted

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>September 2021</td>
<td>26%</td>
<td>31%</td>
<td>31%</td>
<td>7%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>August 2021</td>
<td>22%</td>
<td>38%</td>
<td>32%</td>
<td>13%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>July 2021</td>
<td>13%</td>
<td>44%</td>
<td>13%</td>
<td>4%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>June 2021</td>
<td>16%</td>
<td>41%</td>
<td>5%</td>
<td>9%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>May 2021</td>
<td>23%</td>
<td>44%</td>
<td>3%</td>
<td>22%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>April 2021</td>
<td>23%</td>
<td>45%</td>
<td>9%</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>March 2021</td>
<td>30%</td>
<td>42%</td>
<td>4%</td>
<td>8%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>February 2021</td>
<td>36%</td>
<td>30%</td>
<td>8%</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>January 2021</td>
<td>31%</td>
<td>28%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>December 2020</td>
<td>32%</td>
<td>30%</td>
<td>2%</td>
<td>6%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>November 2020</td>
<td>36%</td>
<td>25%</td>
<td>2%</td>
<td>6%</td>
<td>2%</td>
<td></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

<table>
<thead>
<tr>
<th>Company's current position on employees traveling for business</th>
<th>Non-essential international business trips</th>
<th>Non-essential domestic business trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not allowed</td>
<td>48%</td>
<td>23%</td>
</tr>
<tr>
<td>Rarely allowed</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Sometimes allowed</td>
<td>21%</td>
<td>27%</td>
</tr>
<tr>
<td>Usually allowed</td>
<td>13%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Q. Which of the following best describes your company’s current position on employees traveling for business? (n=525-556)
Note: Some respondents indicated “Not applicable/Not sure.” These responses were excluded from calculations.
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=279)**

The Share of Travel Programs That Have Introduced New Restrictions Because of Variants Remains Roughly Unchanged From Last Month

- **Yes - we have introduced new restrictions**: 23%
- **No - but we are considering introducing new restrictions**: 18%
- **No - we are unlikely to introduce new restrictions**: 51%
- **Not sure**: 8%
For Companies That Still Have Not Resumed Business Travel, Variants Will 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

- Not likely at all
- Not likely
- Neither likely nor unlikely
- Likely
- Very likely

Non-essential domestic business trips
- 8% not likely at all
- 9% not likely
- 38% neither likely nor unlikely
- 43% likely
- 81% very likely

Non-essential international business trips
- 8% not likely at all
- 10% not likely
- 37% neither likely nor unlikely
- 43% likely
- 80% very likely

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=118-196)
New Variants Are Impacting Meetings and Events

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

- Large in-person meeting, event, or conference (more than 500 attendees) 81%
- Attending a medium-sized in-person meeting, event, or conference (51-500 attendees) 74%
- Internal collaboration (i.e., traveling to work at another company office or site; traveling to work with coworkers at another location) 69%
- Attending a small meeting, event, or conference (50 attendees or fewer) 63%
- Sales/account management trips (i.e., traveling to visit a client, customer, or sales prospect) 43%
- Service trips (e.g., consultants traveling to visit clients; blue-collar employees traveling to work on a job site) 30%

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=193).
### Few Companies Require COVID-19 Tests for Business Travel

**Do companies require COVID-19 tests for…?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Require All Employees</th>
<th>Require Unvaccinated</th>
<th>Do Not Require</th>
<th>Other</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic business travel</td>
<td>5%</td>
<td>8%</td>
<td>69%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Attending a meeting or event</td>
<td>10%</td>
<td>12%</td>
<td>57%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Return to the office</td>
<td>9%</td>
<td>16%</td>
<td>54%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>International business travel</td>
<td>13%</td>
<td>8%</td>
<td>51%</td>
<td>13%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Q. Some companies require COVID-19 tests before or after employees travel for business. Which best describes your company’s approach when it comes to the following? (n=527)
Most Companies That Require Tests Will Pay for Them

Will companies pay for or reimburse employees for COVID-19 tests for business travel?
only displayed to respondents who indicated their company will require tests for business travel or return to the office

- 60% We fully pay or reimburse employees to take the test
- 16% We partially pay or partially reimburse employees to take the test
- 19% We do not pay for or reimburse employees to take the test
- 5% Not sure

Q. You mentioned your company requires COVID-19 tests for business travel and/or return to the office. Does your company pay for or reimburse travelers for the cost of a COVID-19 test if required for them to travel for business? Note: Question only displayed to respondents who indicated their company will require COVID-19 tests for all employees or unvaccinated employees for business travel or return to the office. (n=198)
Many Travel Managers Say Their Role Has Changed Because of the Pandemic

Have travel managers seen their role change because of the pandemic?

- My role has not changed at all: 35%
- My role has changed slightly: 24%
- My role has changed somewhat: 29%
- My role has changed a lot: 13%

Q. Thinking about your company’s travel program, has your role at your company changed because of the pandemic?

Note: Question only displayed to travel managers/procurement professionals (n=298)
As a Result of the Pandemic, Most Travel Managers Collaborate More Closely With Other Stakeholders

How have roles changed?

among those who indicated their roles changed at least "slightly"

Collaborate more closely with other departments (e.g., HR, Finance, Legal, Risk Management or teams) to manage the travel program - 71%

Duty of care concerns have taken a higher priority - 70%

Developing new approaches/revisions to current corporate travel guidelines - 69%

Serve on new crossdepartment committee or task force - 44%

Incorporating / prioritizing more sustainability policies in the company’s travel program - 40%

Involvement / responsibility for virtual meeting platform and protocols - 27%

Work with HR to set health policy around vaccinations and testing - 23%

Develop/assist with return to office planning - 23%

Develop/update remote workforce policies - 14%

Other - 10%

Q. You said your role/responsibilities at your company has changed as a result of the pandemic. How has your role/responsibilities changed? Please select all that apply. Note: Question only displayed to travel managers/procurement professionals who indicated their role has changed at least “slightly” (n=188)
Some Travel Managers Spend More Time Collaborating With Other Stakeholders as a Result of the Pandemic

Compared to before the pandemic, do travel managers spend more or less time collaborating with...?

- **Security/risk management**: 1% much less time, 32% less time, 44% the same amount of time, 22% more time, 67% much more time
- **Human resources**: 4% much less time, 46% less time, 40% the same amount of time, 11% more time, 50% much more time
- **Senior management/C-level**: 3% much less time, 51% less time, 36% the same amount of time, 10% more time, 46% much more time
- **Legal/compliance**: 2% much less time, 62% less time, 28% the same amount of time, 6% more time, 35% much more time
- **Finance/accounting**: 3% much less time, 72% less time, 18% the same amount of time, 6% more time, 24% much more time

Q. Compared to before the pandemic, do you spend more or less time collaborating with the following stakeholders or departments at your company? (n=276-287)
More Than One-Third of Travel Managers Say Their Company Relies More On TMCs Compared to Before the Pandemic

Has the pandemic changed how companies use TMCs?
travel managers/procurement professionals only

- Much less reliant on TMC services/support
- Somewhat less reliant on TMC services/support
- Equally reliant on TMC services support
- Somewhat more reliant on TMC services/support
- Much more reliant on TMC services/support

4% 7% 52% 29% 7%

Q. Is your company more or less reliant on services or support from your travel management company (TMCs) than you were before the pandemic? **Note: Question only displayed to travel managers/procurement professionals (n=287)**
Two in Five Respondents Say Their Company Has Reevaluated the ROI of Business Travel

Has your company reevaluated the ROI of business travel?

- Yes (41%)
- No (18%)
- Not yet, but we are considering reevaluation (18%)
- Don’t know (24%)

Q. Has your company reevaluated the Return on Investment for business travel in terms of its importance and value? (n=506)

What are companies rethinking? multiple answers allowed

- Increased use of virtual meetings (59%)
- Increased emphasis on traveler wellbeing and safety (56%)
- Increased use of hybrid meetings (52%)
- Reduced travel for internal collaboration meetings (49%)
- Reduction in travel costs (48%)
- Reducing business travel at the company across the board (38%)
- Less business trips overall but longer, purpose-drive trips for those who need to travel (37%)
- More robust/intensive travel approval process (31%)
- Reducing travel due to sustainability or environmental concerns or goals (28%)
- Allowing employees more flexible options for flights and hotel stays (23%)
- Other (2%)

Q. You said your company is reevaluating the Return on Investment for business travel. What areas are you rethinking? Please select all that apply. Note: Question only displayed to respondents who indicated their company has reevaluated the ROI of business travel (n=221)
Nine in 10 Respondents Say Their Company Allows Remote Work – and Few Currently Have Return to Office Plans Though Many Are Discussing Such Plans

Q. Does your company allow employees to work remotely due to the pandemic? Please tell us your company’s current position on employees working remotely. (n=563)

- Yes, employees work remotely and there are no current plans to return to the office (9%)
- Yes, employees work remotely, and my company is discussing the return to office, but no decision has been made (28%)
- Yes, employees work remotely (52%)
- No, employees cannot work remotely (11%)
7 in 10 Travel Suppliers Have Changed Operations/Safety Protocols Due to 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=217)**
2 in 5 Companies Plan to Resume Domestic Business Travel in the Near Future

77% of companies have canceled or suspended most (41%) or all (36%) international trips.

38% of companies have canceled or suspended most (30%) or all (7%) 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?

Q. Thinking about your company, how has the coronavirus impacted business travel to...? (n=461-493)