

# Coronavirus Recovery Poll Results

September 23, 2021

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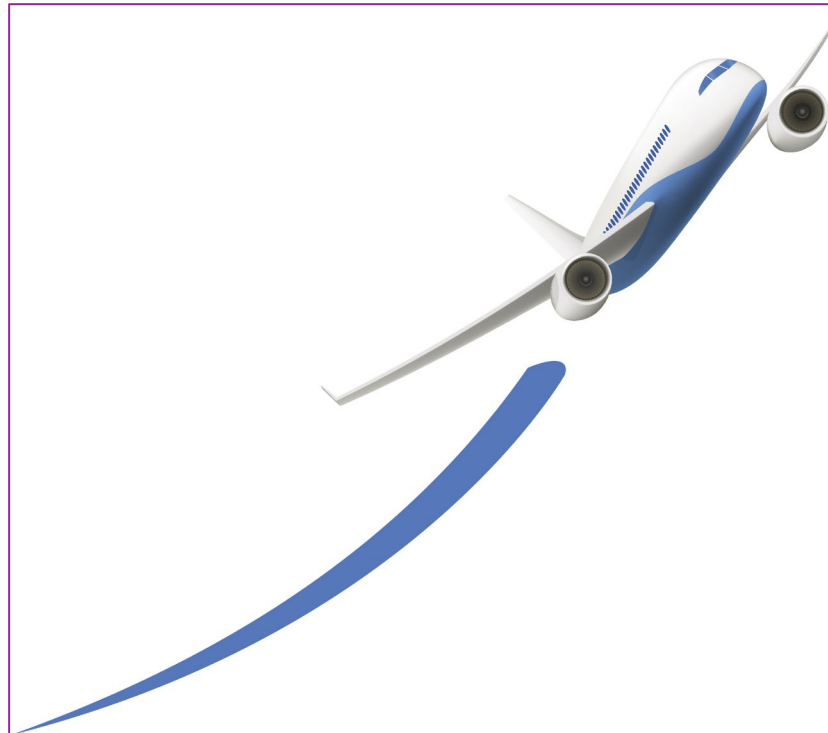


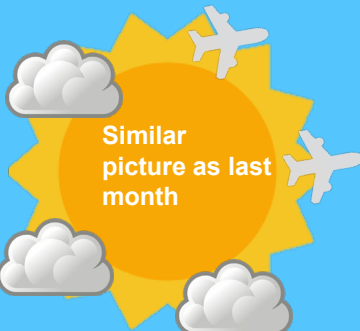
# Methodology

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

- Fielding took place from 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

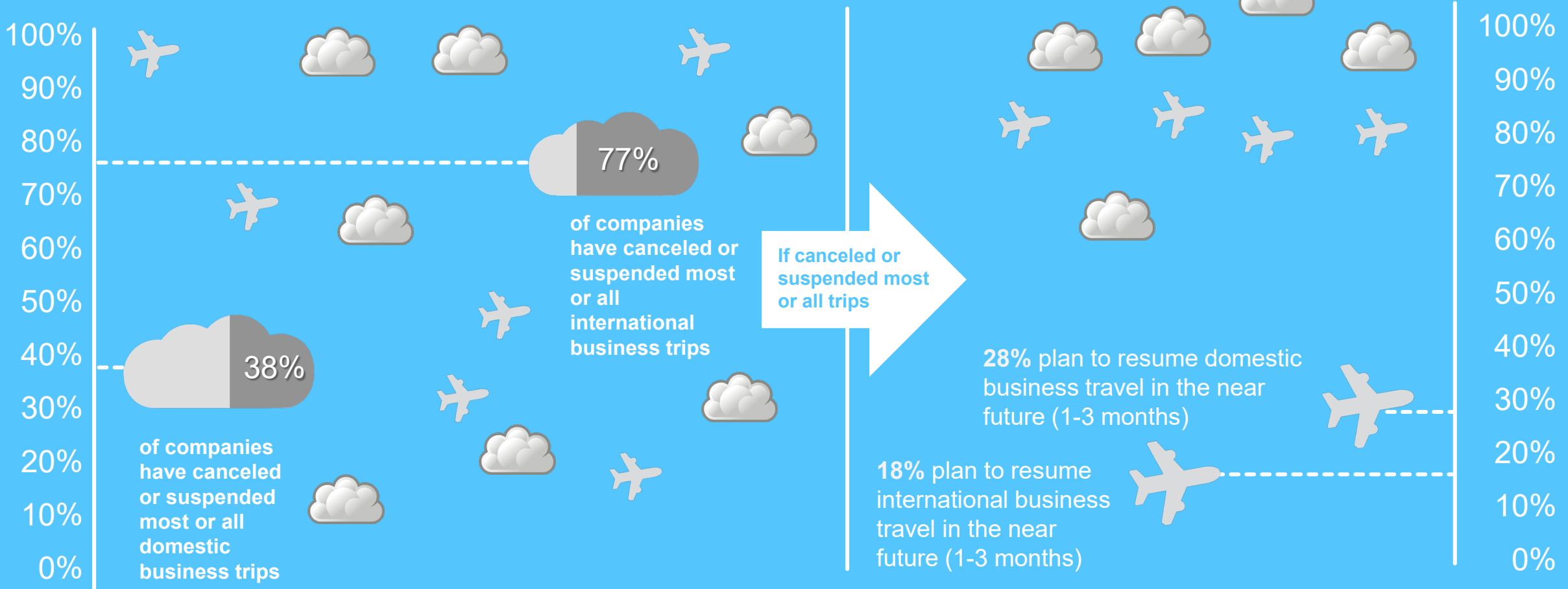
# The State of Business Travel





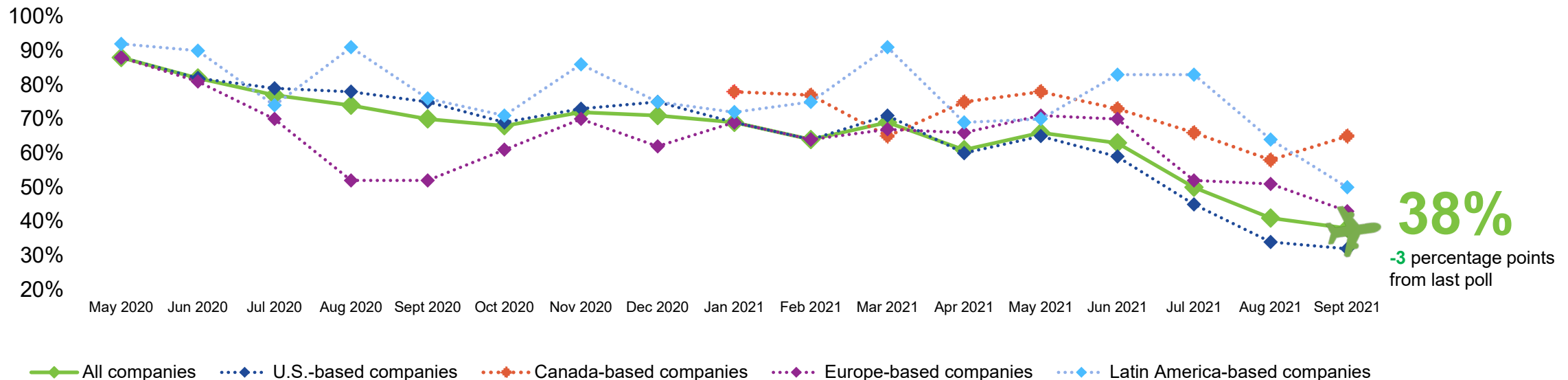
# The State of Business Travel

## September 2021



# The State of Domestic Business Travel

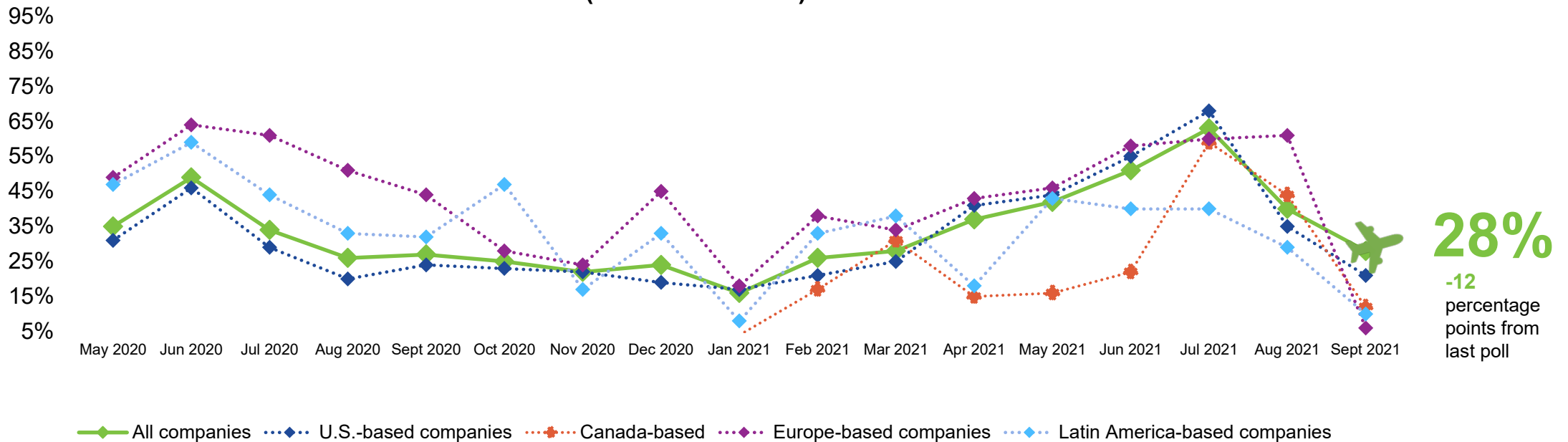
**% of companies that have canceled or suspended most or all domestic business travel within their country**



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

# The State of Domestic Business Travel (Cont.)

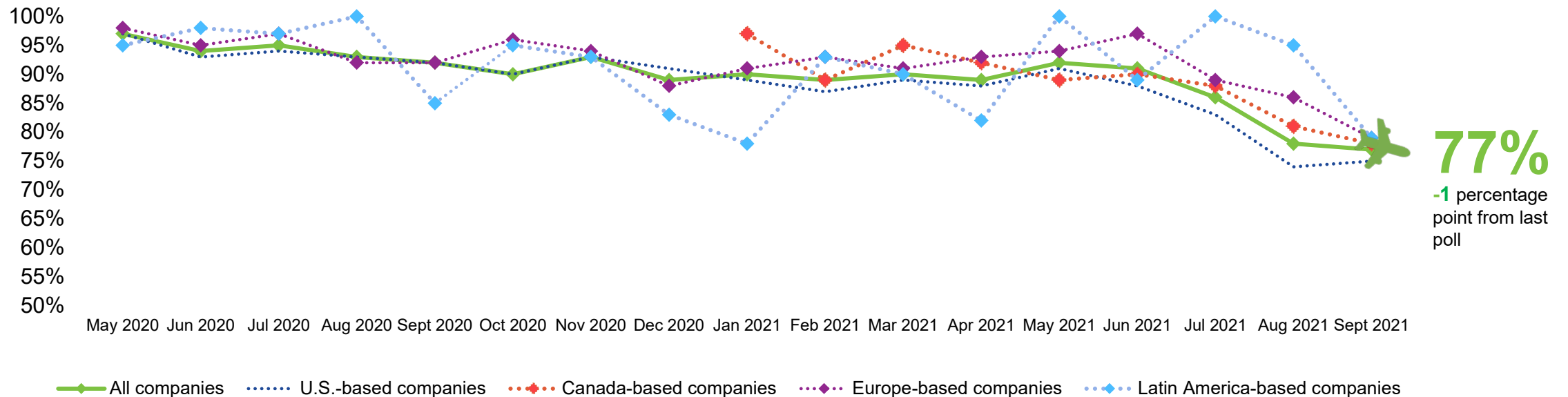
**% of companies that plan to resume domestic business travel in the near future (next 1-3 months)\***



\*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

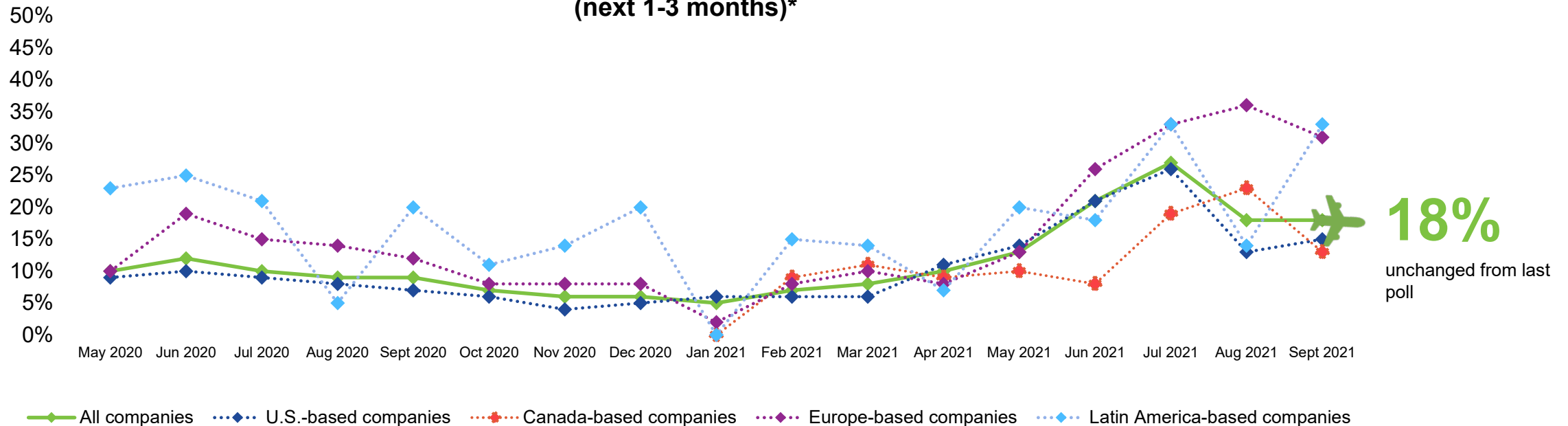


**77%**  
-1 percentage point from last poll

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)\***

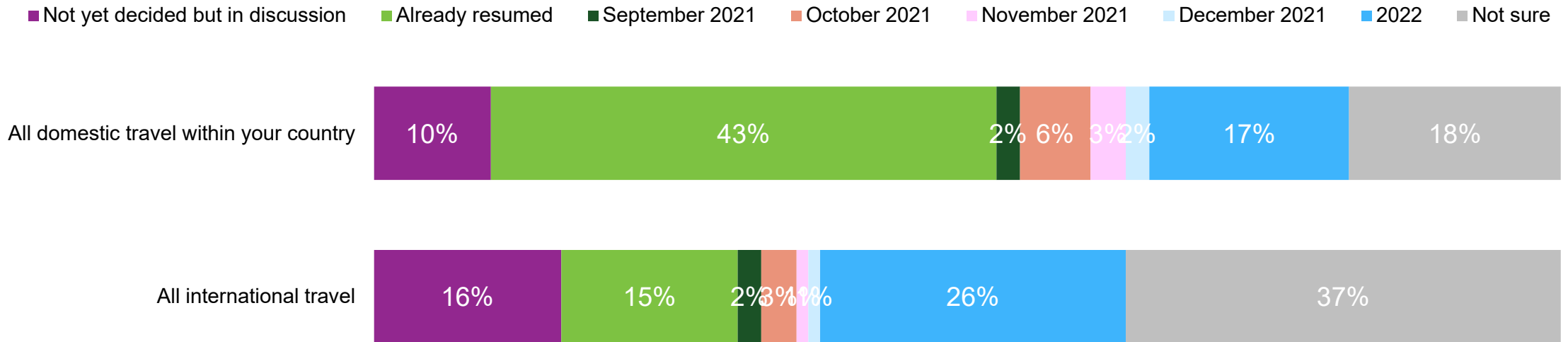


\*figures are among those that indicated their company has canceled or suspended most or all international business trips  
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)



# What's the Specific Timeline?

## When do companies specifically plan to resume business travel?

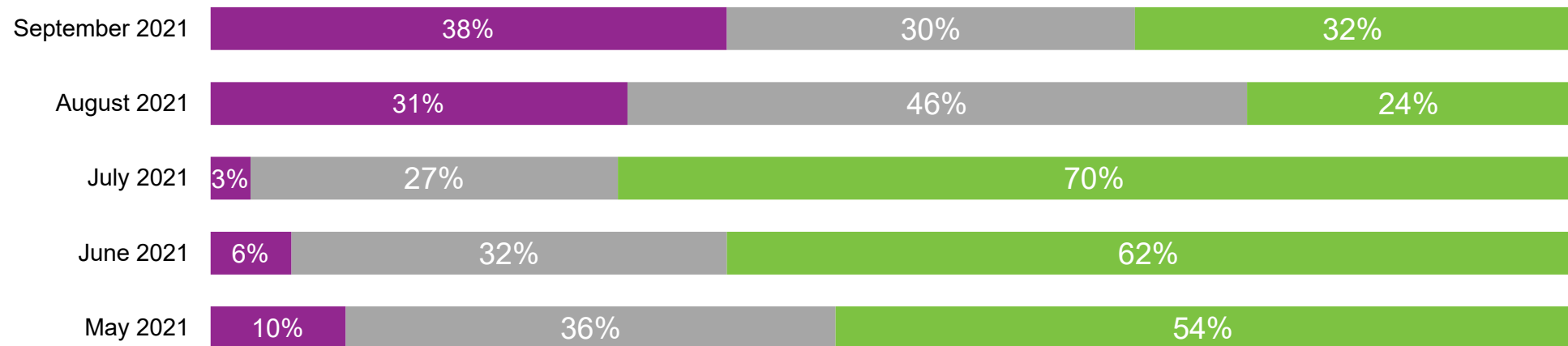


Q. When does your company expect to resume the following types of business trips specifically? (n=505-508)

# For Some Travel Suppliers, Future Bookings Continue to Drop...

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

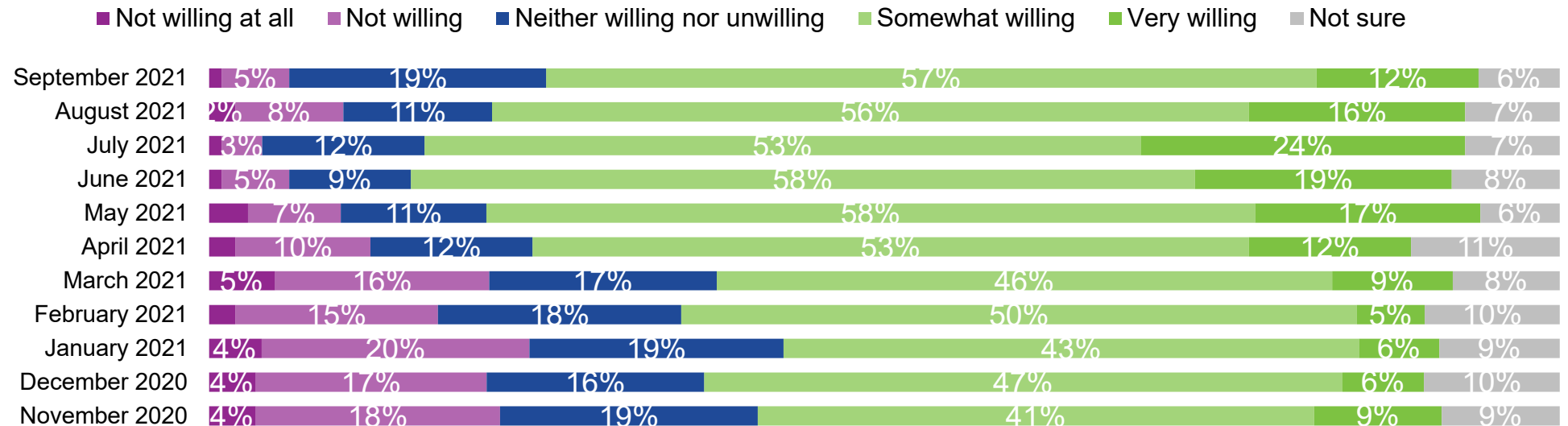
■ Our bookings have decreased   ■ Our bookings have remained the same   ■ Our bookings have increased



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?

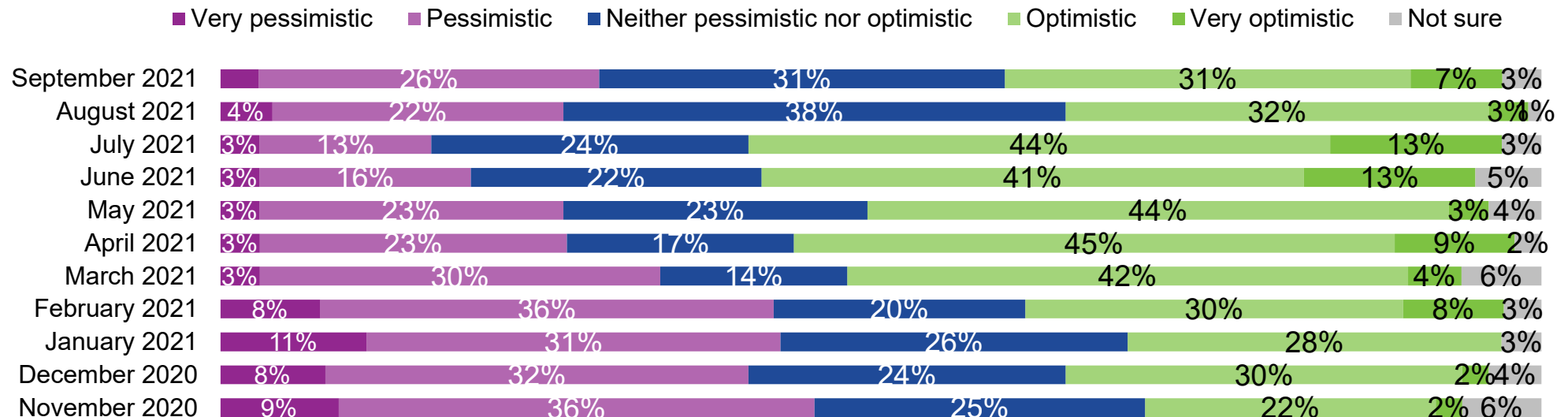


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=278-448)

# Supplier Optimism Remains Muted

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



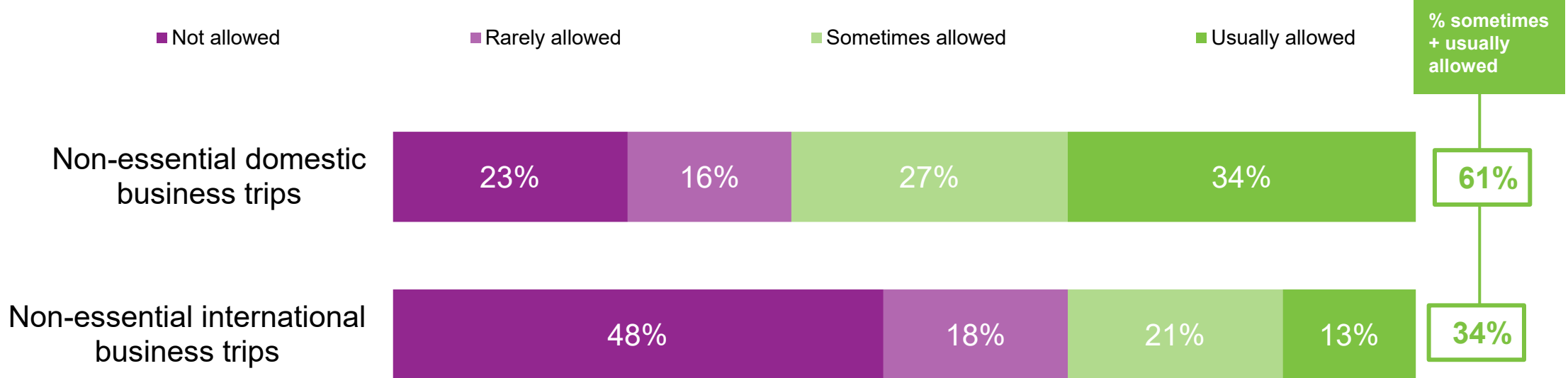
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=188-332)**

# Key Highlights



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

Company's current position on employees traveling for business



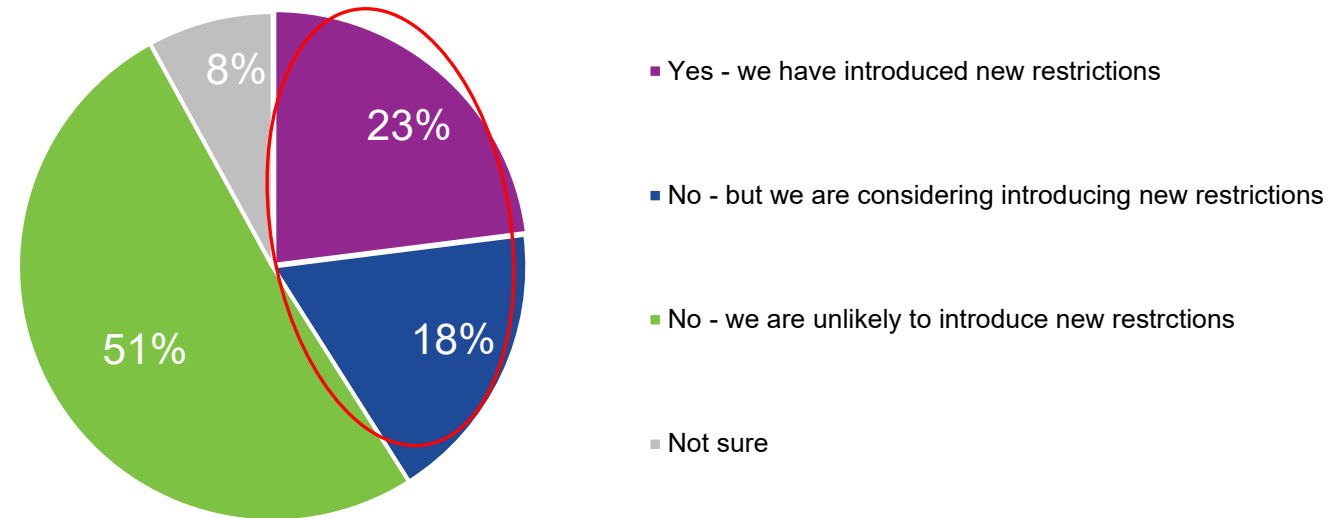
Q. Which of the following best describes your company's current position on employees traveling for business? (n=525-556)

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

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



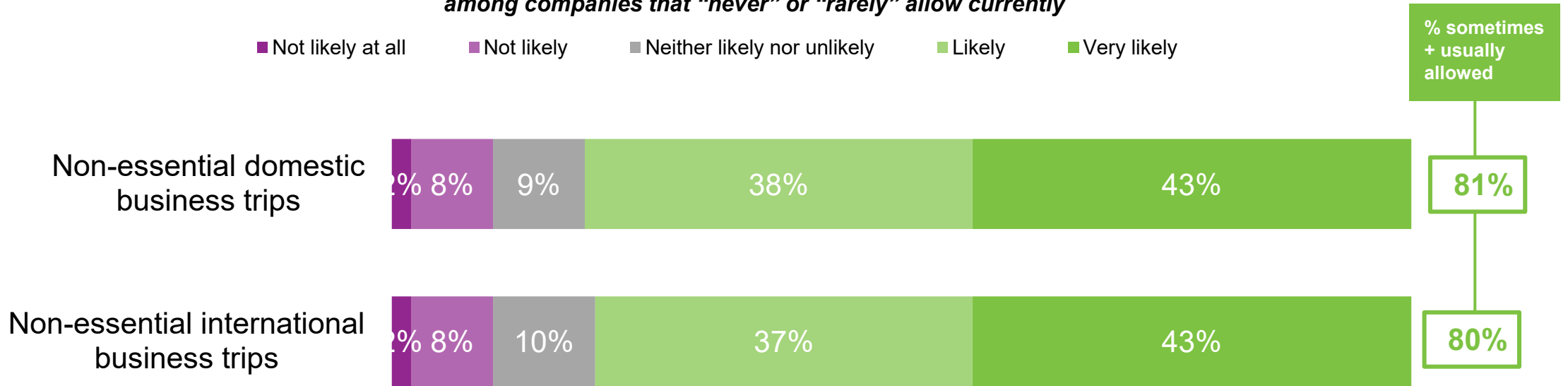
Have companies introduced new restrictions on non-essential business travel as a result of new variants?



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=279)**

# 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

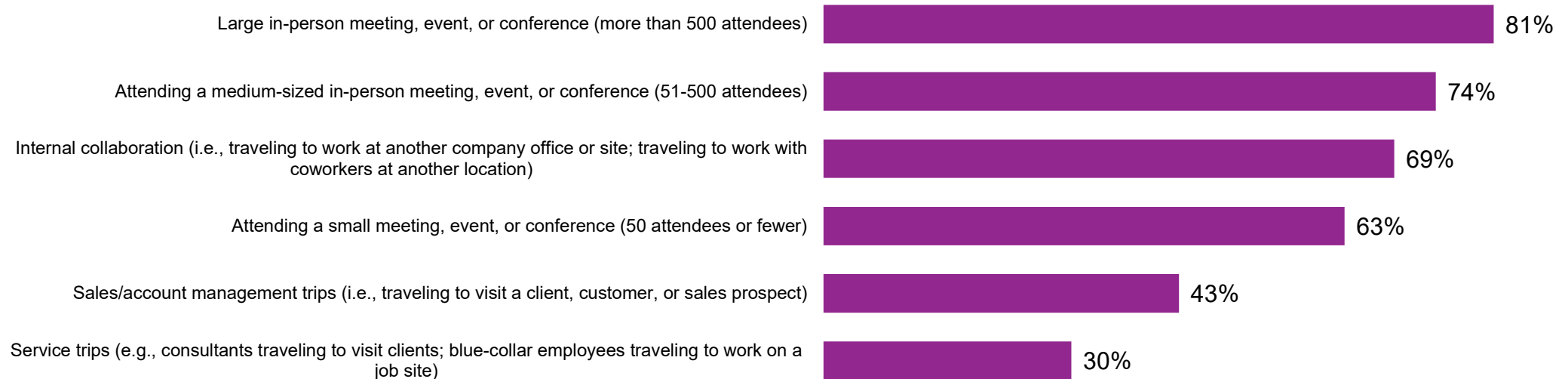


Q. Thinking about the Delta variant / other variants and the growing number of coronavirus cases in many countries, please rate the likelihood that these will delay your company’s plans to resume non-essential business travel. **Note: Question only displayed to travel buyers/procurement professionals. 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*

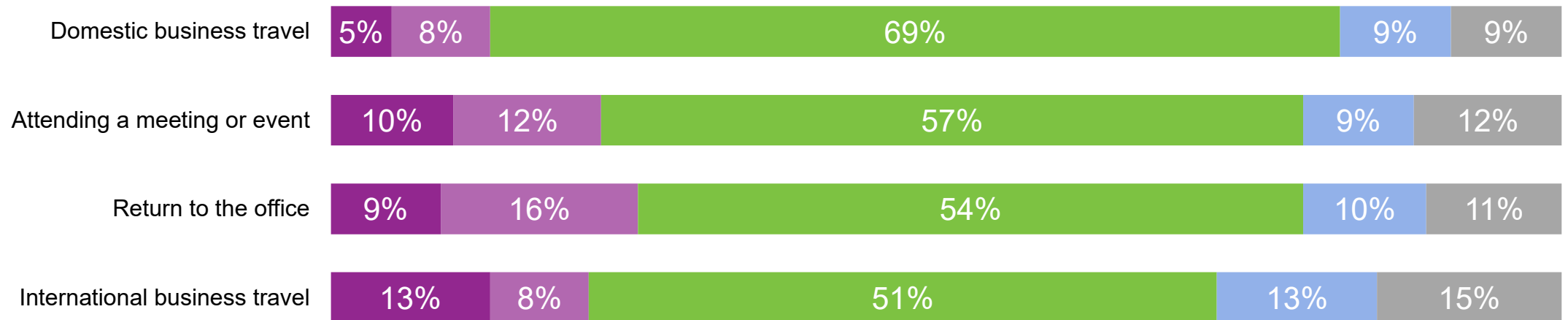


Q. Due to the impact of the Delta variant / other variants and its rapid spread around the globe, has your company postponed or canceled employee business travel to attend the following types of meetings or events? **Please select all that apply. Note: Question only displayed to travel buyers/procurement professionals (n=193).**

# Few Companies Require COVID-19 Tests for Business Travel

Do companies require COVID-19 tests for...?

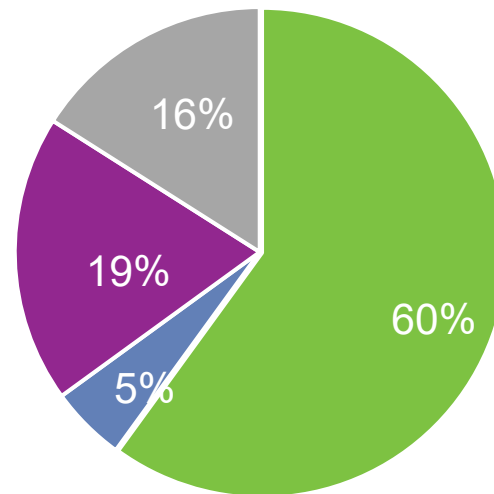
■ We require COVID-19 tests for all employees regardless of vaccination status ■ We require COVID-19 tests only of unvaccinated employees ■ We do not require COVID-19 tests ■ Other ■ Not sure



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



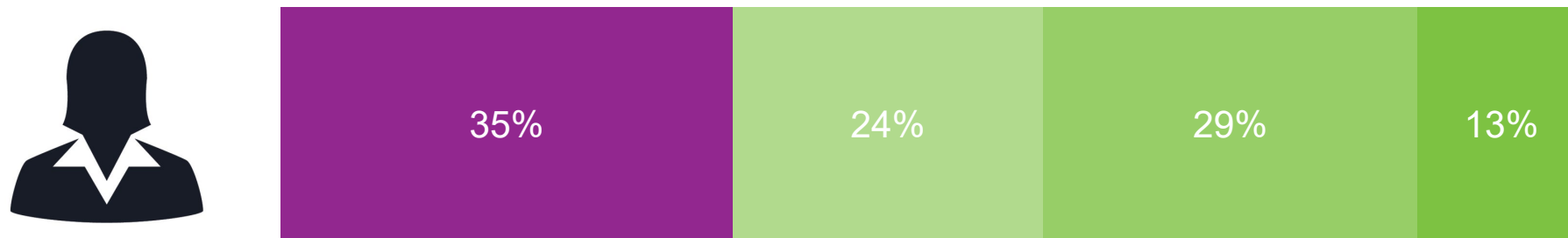
- We fully pay or reimburse employees to take the test
- We partially pay or partially reimburse employees to take the test
- We do not pay for or reimburse employees to take the test
- Not sure

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   ■ My role has changed slightly   ■ My role has changed somewhat   ■ My role has changed a lot



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”*



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...?

■ Much less time ■ Less time ■ The same amount of time ■ More time ■ Much more time

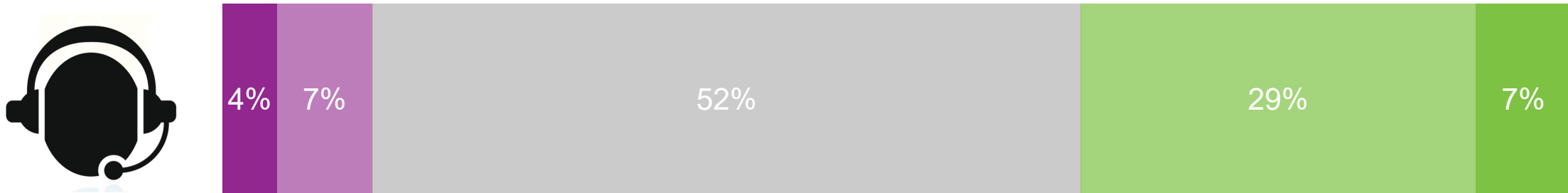


Q. Compared to before the pandemic, do you spend more or less time collaborating with the following stakeholders or departments at your company? (n=276-287)

# 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

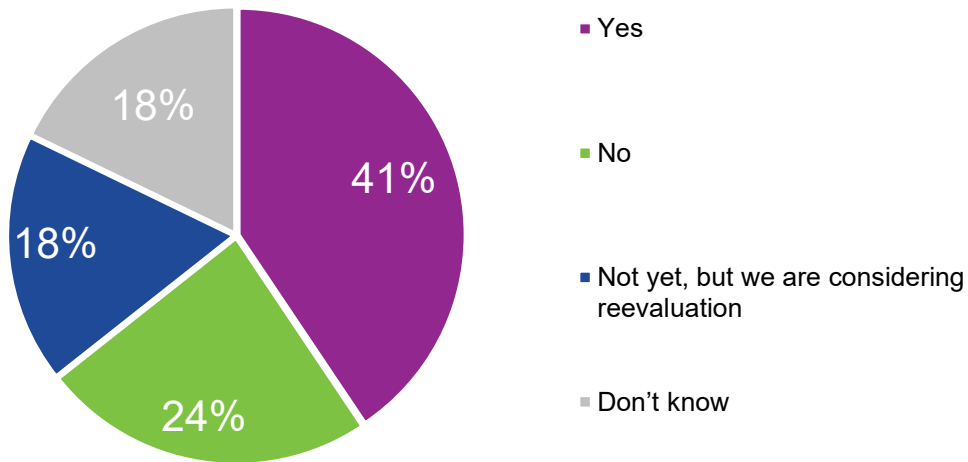
■ Much less reliant on TMC services/support ■ Somewhat less reliant on TMC services/support ■ Equally reliant on TMC services support ■ Somewhat more reliant on TMC services/support ■ Much more reliant on TMC services/support



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

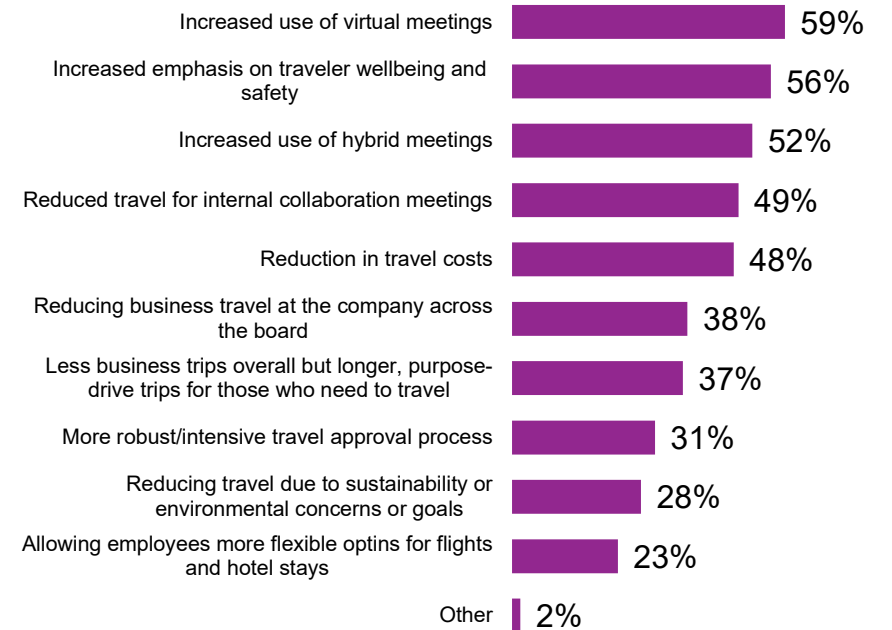
Has your company reevaluated the ROI of business travel?



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



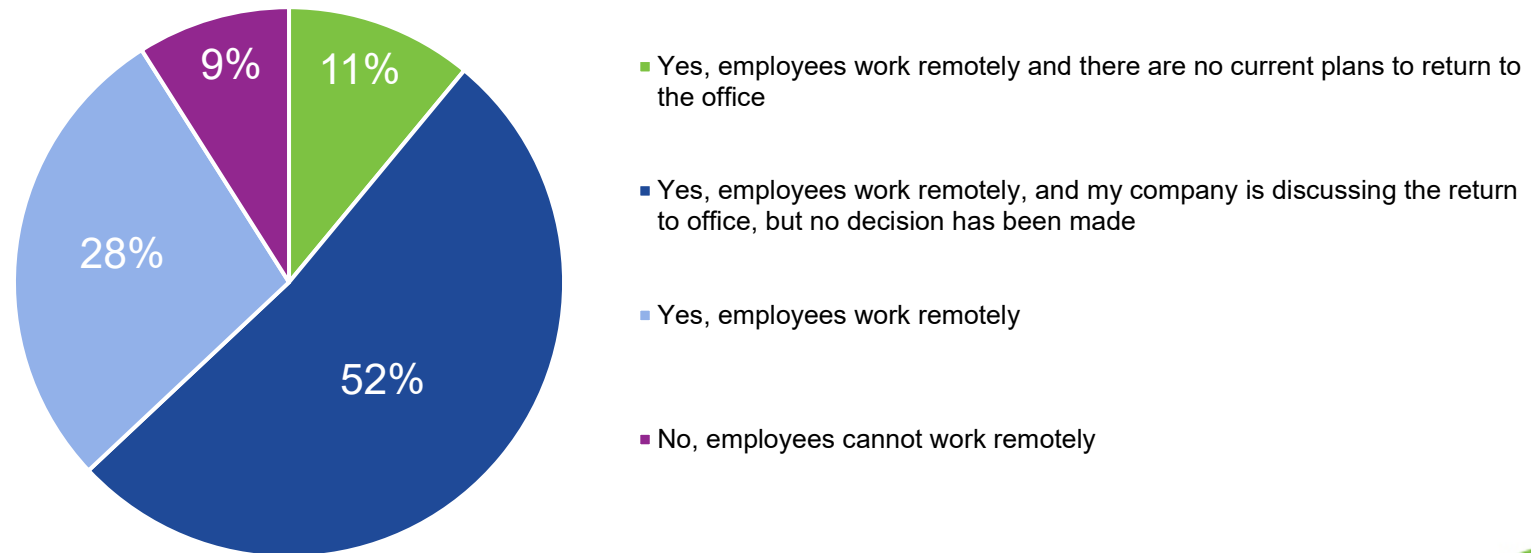
Q. You said your company is reevaluating the Return on Investment for business travel. What areas are you rethinking? Please select all that apply.

**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

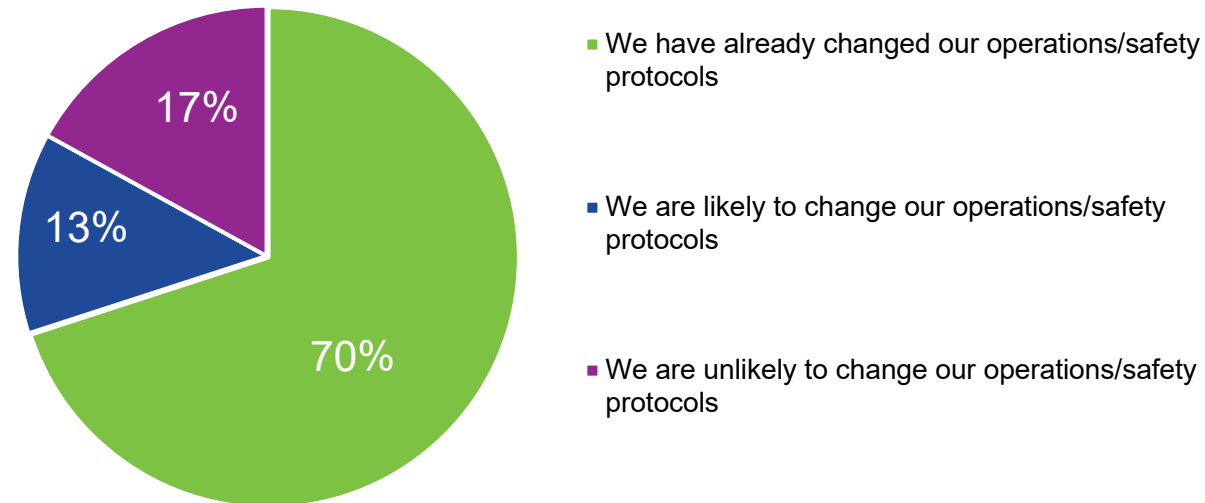
Do employees at your company work remotely?



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)

# 7 in 10 Travel Suppliers Have Changed Operations/Safety Protocols Due to New Variants

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=217)**

# 2 in 5 Companies Plan to Resume Domestic Business Travel in the Near Future

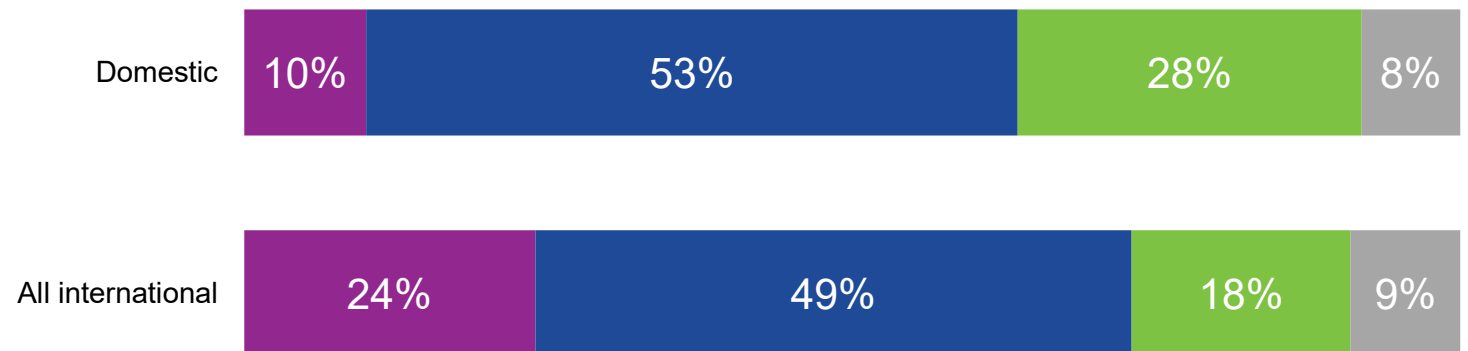
 **77%**  
of companies have canceled or suspended **most** (41%) or **all** (36%) international trips

 **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?  
**Note: Respondents only asked about countries/regions where they indicated their company has canceled or suspended most or all business travel (n=178-346)**

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