

# Coronavirus Recovery Poll Results

January 20, 2022

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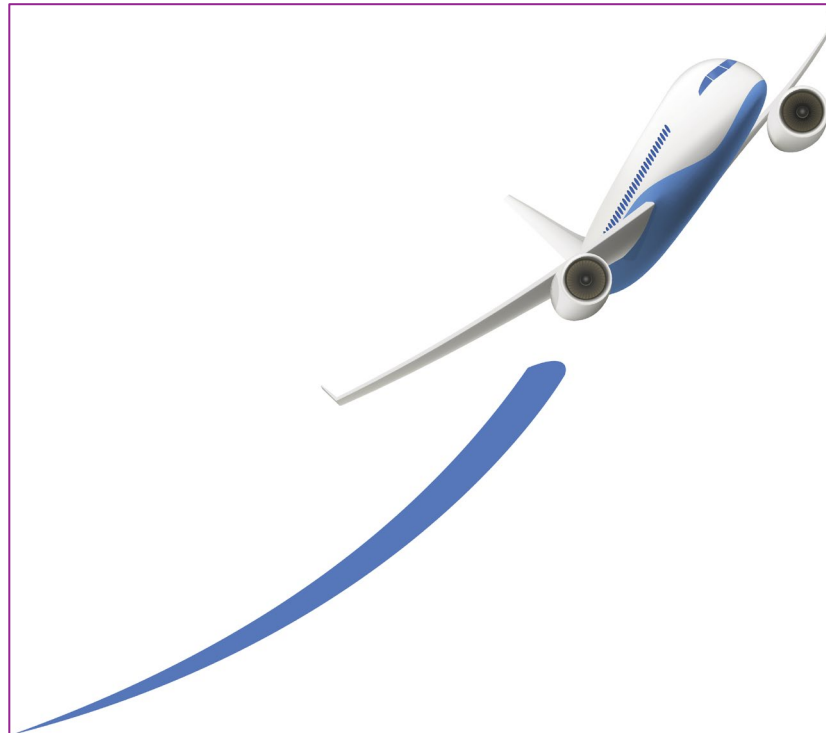


# Methodology

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

- Fielding took place from January 4 through January 12, 2022
- An email invitation was sent to 16,005 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, 832 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

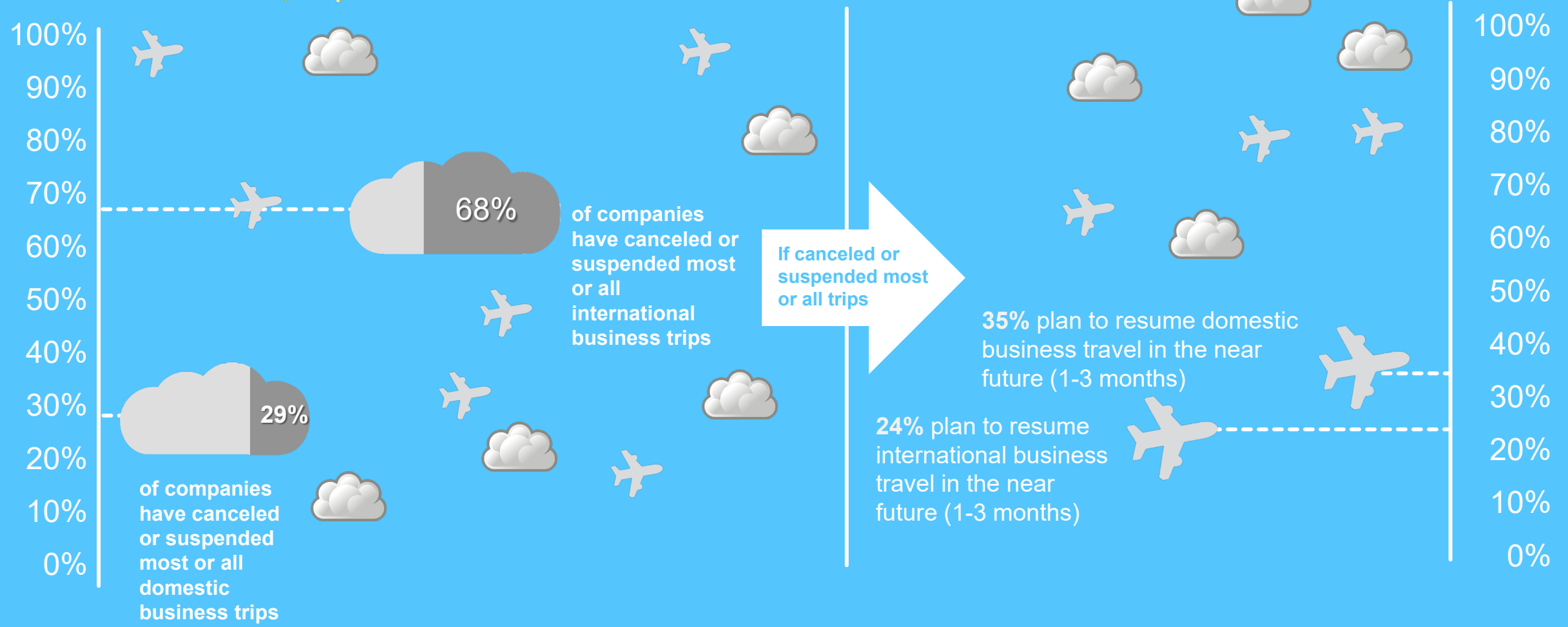
# The State of Business Travel





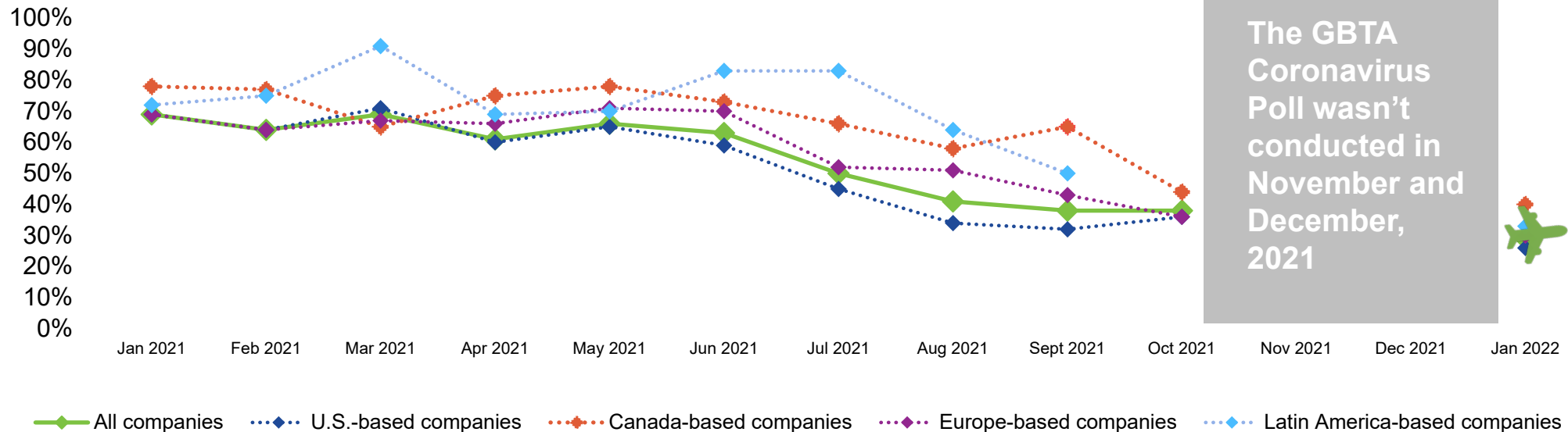
# The State of Business Travel

## January 2022



# The State of Domestic Business Travel

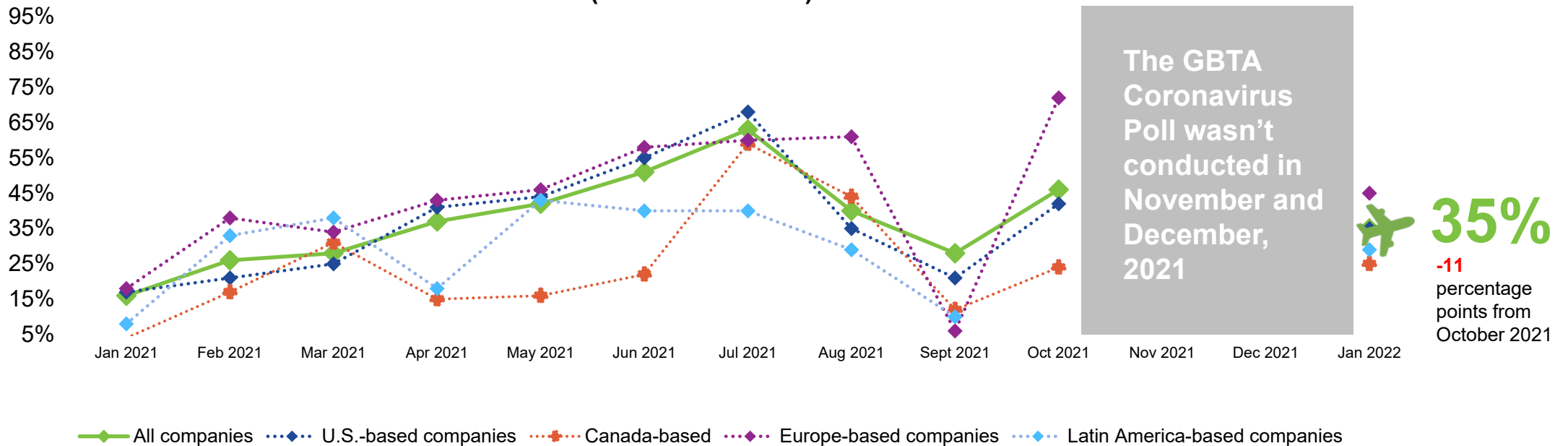
**% of companies that have canceled or suspended most or all domestic business travel within their country**



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)\*

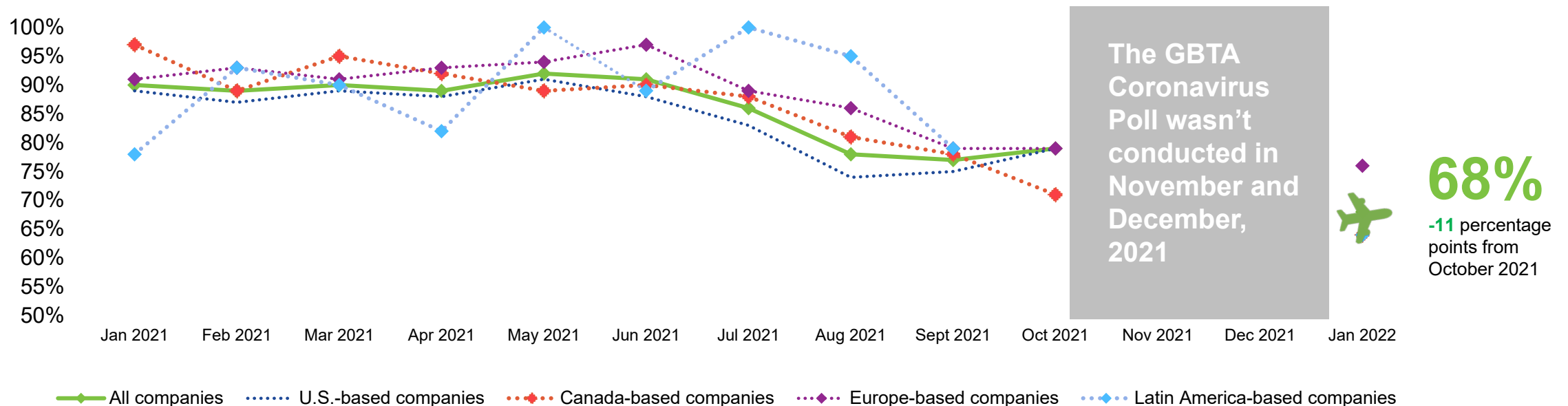


\*figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country

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

# The State of International Business Travel

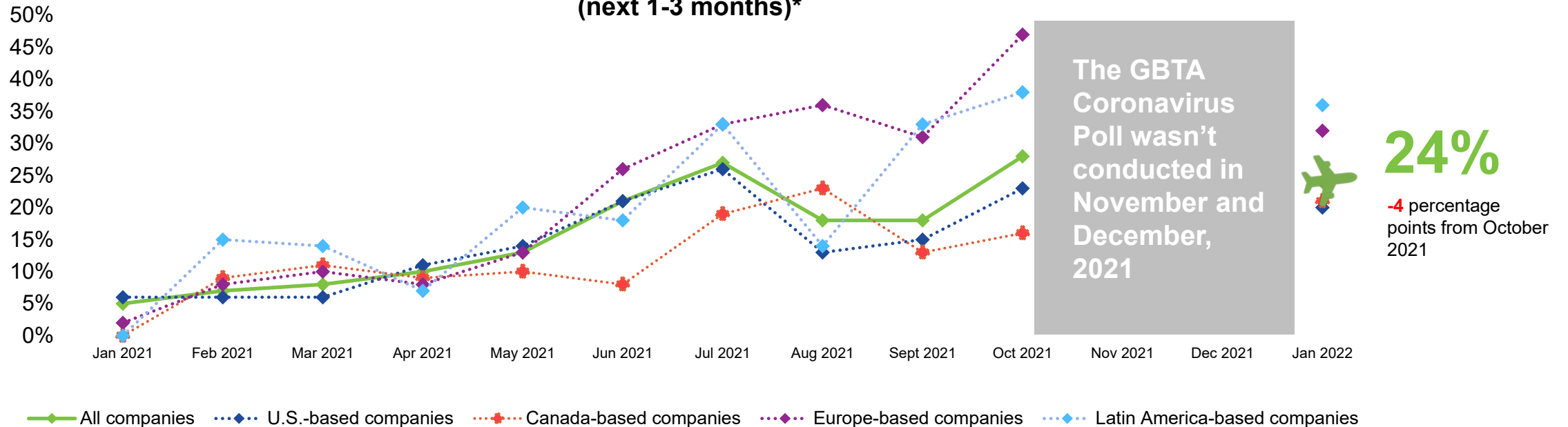
% of companies that have canceled or suspended most or all international business travel



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)\***



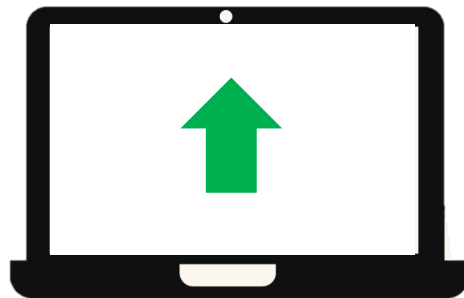
\*figures are among those that indicated their company has canceled or suspended most or all international business trips

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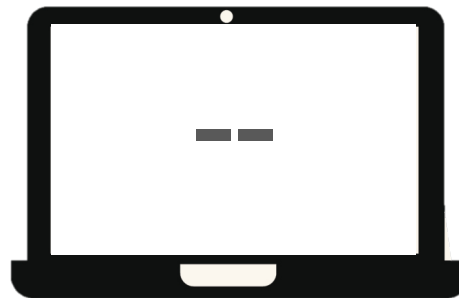


# Has Omicron Slowed Future Bookings?

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



**21%** Our bookings have increased



**19%** Our bookings have remained the same

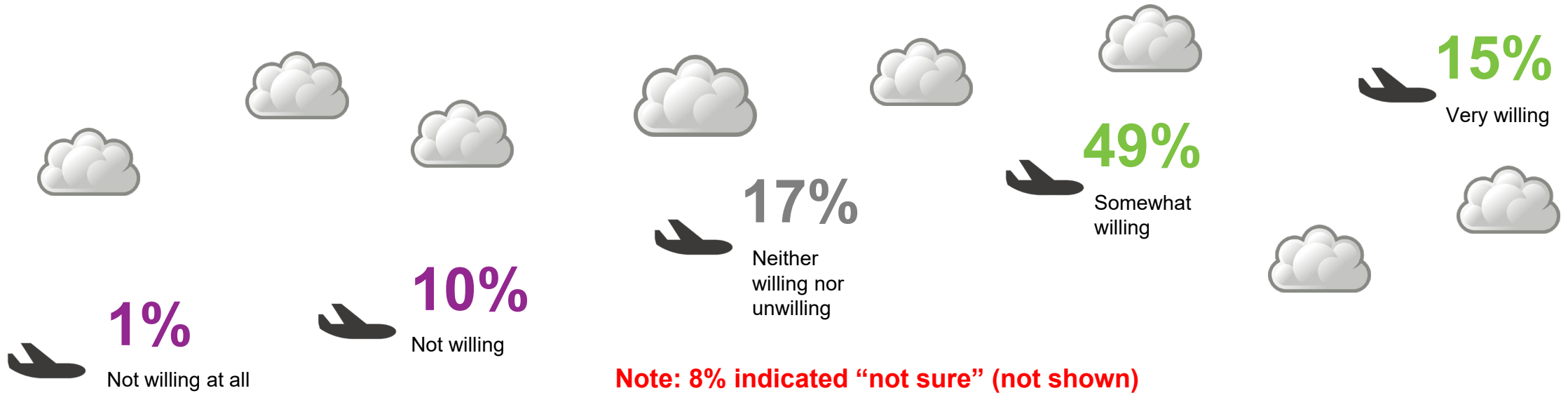


**60%** Our bookings have decreased

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

# Despite Omicron, Most Travel Managers Still Think Employees Are Willing to Travel

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



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

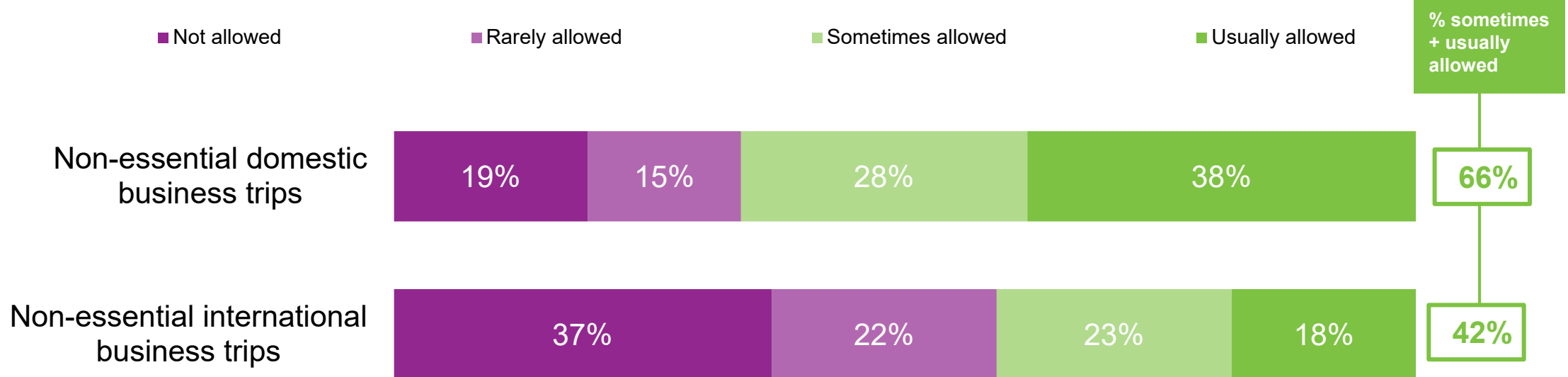
Note: Question only displayed to travel managers/procurement professionals (n=389)

# Key Highlights



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

Company's current position on employees traveling for business



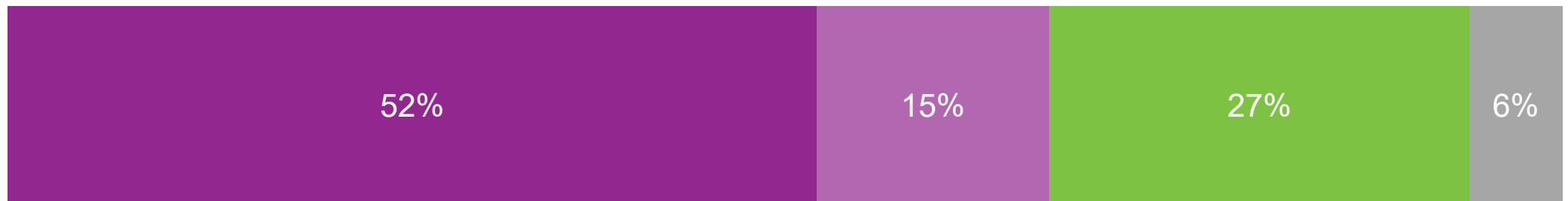
Q. Which of the following best describes your company's current position on employees traveling for business? (n=689-737)

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

# More Than 2 in 5 Travel Programs Have Introduced– Or Are Considering Introducing – New Restrictions or Requirements for Non-Essential Business Travel as a Result of Omicron

Has your company introduced new restrictions or requirements for non-essential business travel as a result of the Omicron variant?  
*travel managers/procurement professionals only*

■ No - we are unlikely to      ■ No - but we are considering      ■ Yes - we have introduced new restrictions or requirements      ■ Not sure

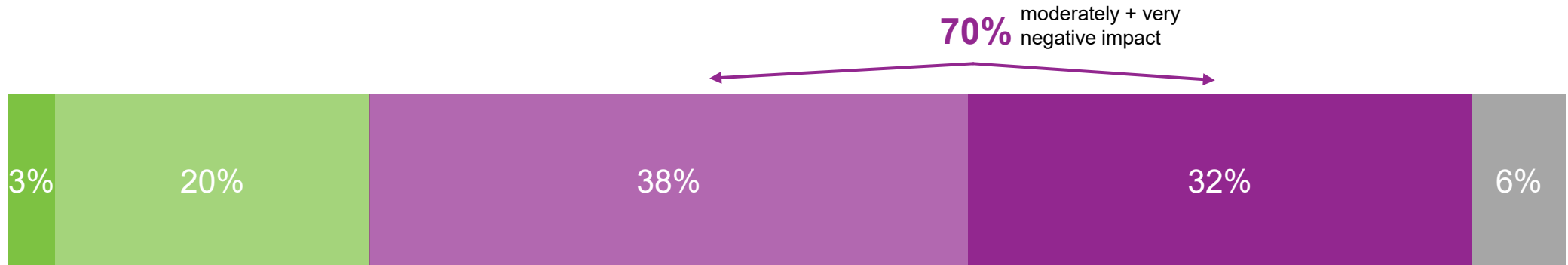


Q. Specifically as a result of the Omicron variant, has your company introduced new restrictions on non-essential business travel or new requirements related to business travel as a whole? (n=398)

# Omicron Variant Expected to Negatively Impact Business Travel Revenue

How will Omicron variant and growing cases impact your company's revenue from business travelers and corporate customers?  
*travel suppliers/TMC employees only*

■ It will have no 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

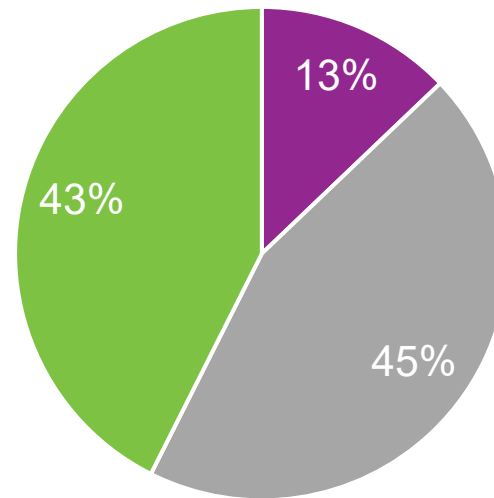


Q. You indicated you work for a travel supplier or TMC. To what extent do you believe the Omicron variant/other variants and the growing number of coronavirus cases in many countries will impact your revenue from business travelers and corporate travel customers?

**Note: Question only displayed to travel suppliers/TMC employees (n=315)**

# When Compared With the Delta Variant, Most Business Travel Professionals Are Equally or Less Concerned About the Omicron Variant

How does concern about the Omicron variant compare to concern about the Delta variant?



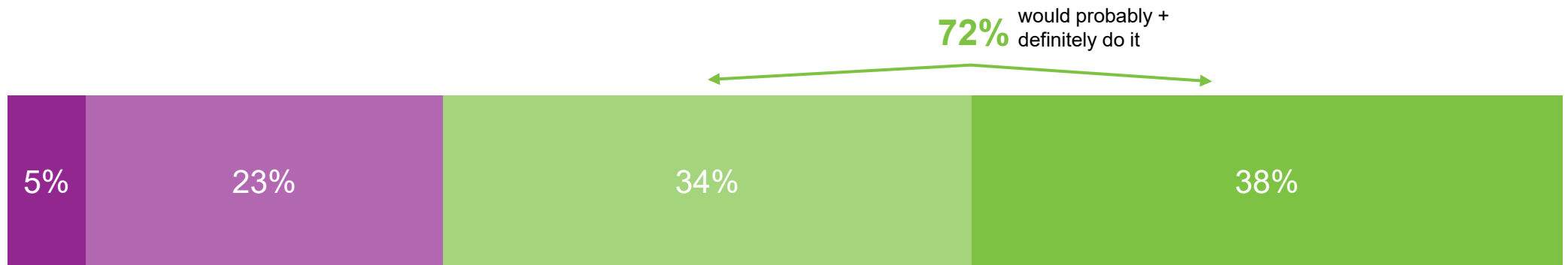
- I am more worried about the Omicron variant than I was about the Delta variant
- I am equally worried about the Omicron variant as I was about the Delta variant
- I am less worried about the Omicron variant than I was about the Delta variant

Q. Thinking about the Omicron variant and its impact on business travel specifically, which of the following best describes your view? (n=774)

# Most Respondents Would Personally Travel for Business

How do you feel about traveling for business currently?

■ I would definitely not do it      ■ I would probably not do it      ■ I would probably do it      ■ I would definitely do it

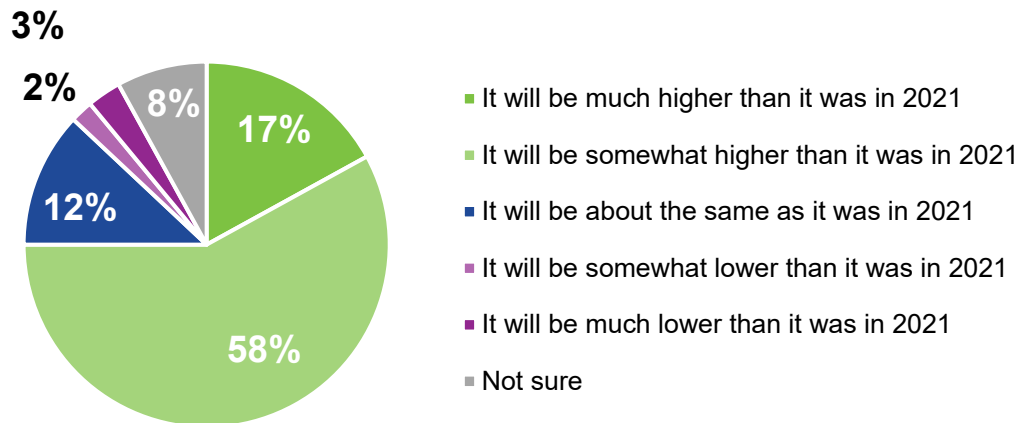


Q. How do you feel about traveling for business currently? (n=776)



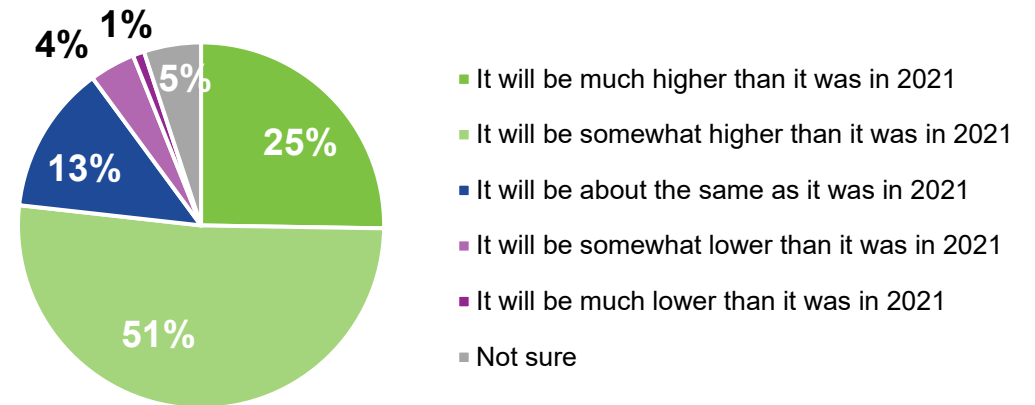
# Despite Omicron, Business Travel Professionals Are Optimistic About 2022

**Buyer expectations about business travel volume at their company in 2022**



**75% somewhat + much higher**

**Supplier expectations about their company's revenue from business travel in 2022**



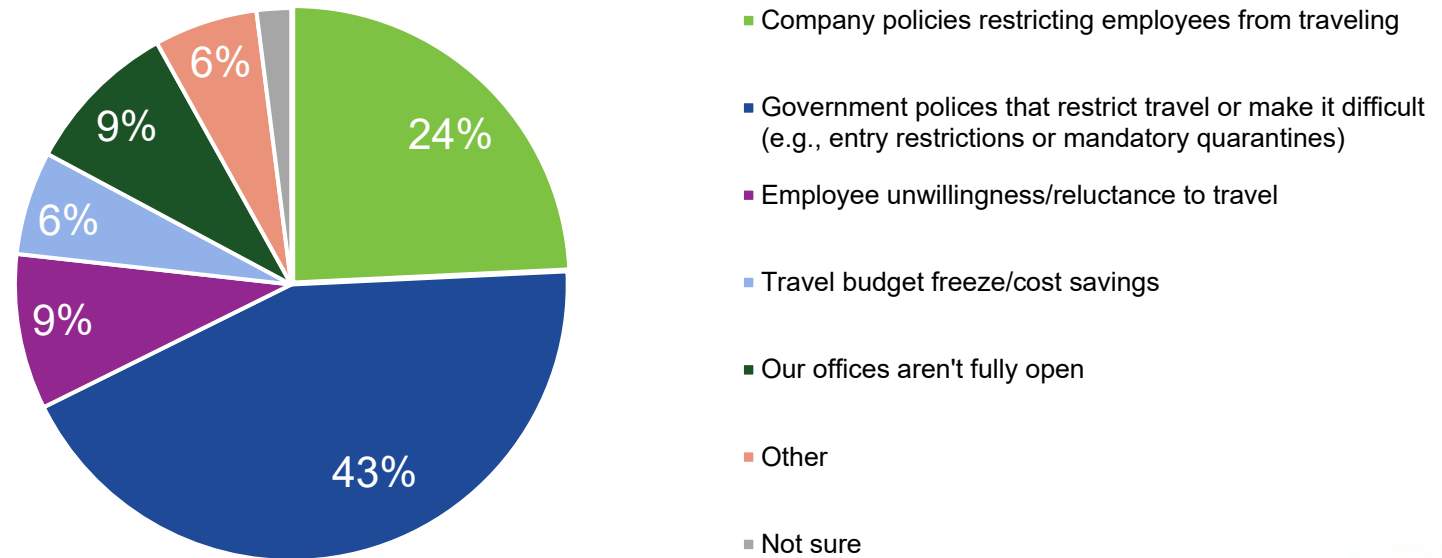
**76% somewhat + much higher**

Q. Thinking about the volume of business travel at your company, which of the following best describes your expectations for this year (2022)?  
 Note: Question only displayed to travel buyers/procurement professionals (n=400)

Q. Thinking about your company's revenue from business travel, which of the following best describes your expectations for this year (2022)? Note: Question only displayed to travel suppliers/TMC employees (n=315)

# Government Policies Still Viewed As Greatest Barrier to Business Travel

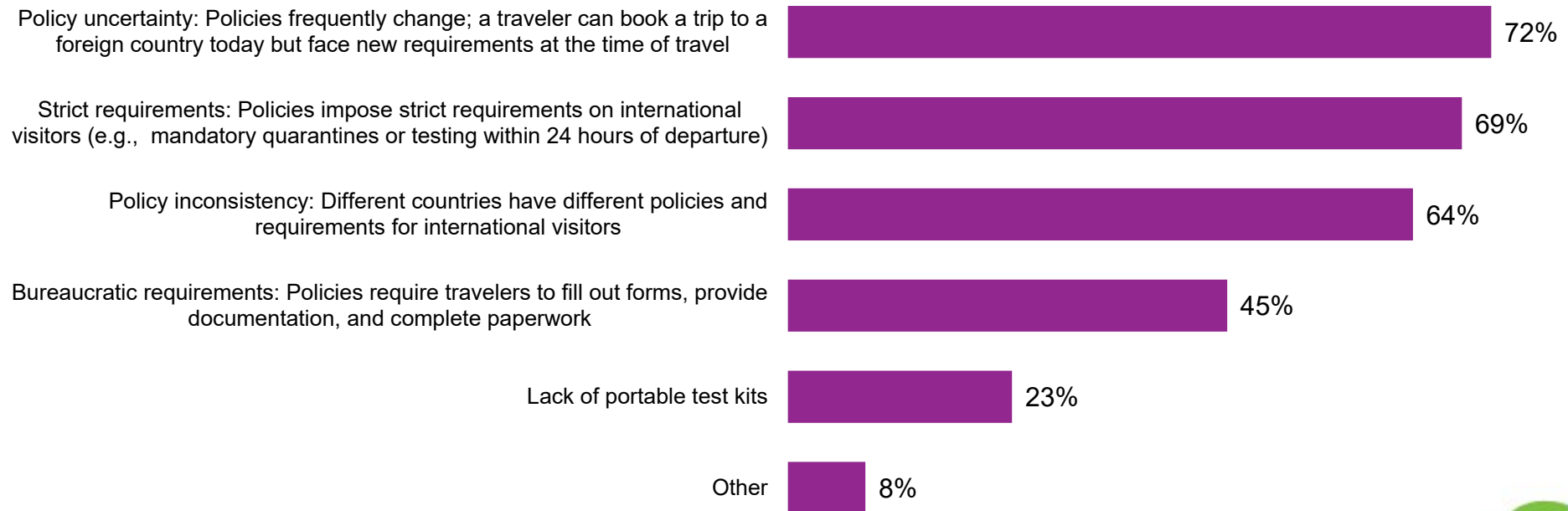
What is the single greatest barrier to business travel?



Q. In the current environment, what do you view as the single greatest barrier to business travel? Please select one. (n=762)

# Policy Uncertainty and Inconsistency Hinder the Recovery of International Business Travel

Which of the following are barriers to international business travel?  
*multiple answers allowed*



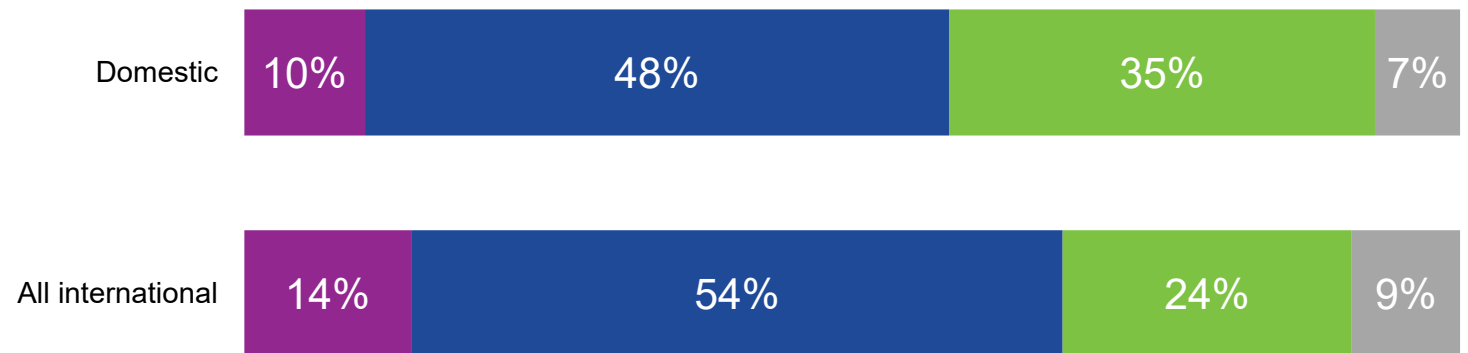
Q. Which of the following do you view as barriers to international business travel? Please select all that apply (n=739).

# Fewer Than One-Third of 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=613-677)

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=195-413)