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

- 68% of companies have canceled or suspended most or all international business trips
- 29% of companies have canceled or suspended most or all domestic business trips

If canceled or suspended most or all trips:
- 35% plan to resume domestic business travel in the near future (1-3 months)
- 24% plan to resume international business travel in the near future (1-3 months)

Omicron clouds return to travel – but doesn’t reverse progress already made.
The State of Domestic Business Travel

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

The GBTA Coronavirus Poll wasn’t conducted in November and December, 2021

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)*

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

The GBTA Coronavirus Poll wasn’t conducted in November and December, 2021

35% -11 percentage points from October 2021

*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

The GBTA Coronavirus Poll wasn’t conducted in November and December, 2021

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)
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.

- 1% Not willing at all
- 10% Not willing
- 17% Neither willing nor unwilling
- 49% Somewhat willing
- 15% Very willing

Note: 8% indicated “not sure” (not shown)
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=689-737)

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>19%</td>
<td>37%</td>
</tr>
<tr>
<td>Rarely allowed</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>Sometimes allowed</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Usually allowed</td>
<td>38%</td>
<td>18%</td>
</tr>
</tbody>
</table>

% sometimes + usually allowed:

- Non-essential domestic business trips: 66%
- Non-essential international business trips: 42%
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

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)

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No - we are unlikely to</td>
<td>52%</td>
</tr>
<tr>
<td>No - but we are considering</td>
<td>15%</td>
</tr>
<tr>
<td>Yes - we have introduced new restrictions or requirements</td>
<td>27%</td>
</tr>
<tr>
<td>Not sure</td>
<td>6%</td>
</tr>
</tbody>
</table>
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

70% moderately + very negative impact

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

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

- 13% I am more worried about the Omicron variant than I was about the Delta variant
- 13% I am equally worried about the Omicron variant as I was about the Delta variant
- 45% I am less worried about the Omicron variant than I was about the Delta variant
- 43% (remainder)
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

72% would probably + 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**

- 58% It will be about the same as it was in 2021
- 17% It will be somewhat lower than it was in 2021
- 12% It will be somewhat higher than it was in 2021
- 8% It will be much higher than it was in 2021
- 3% Not sure

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

- 51% Not sure
- 13% It will be somewhat lower than it was in 2021
- 5% It will be somewhat higher than it was in 2021
- 4% It will be much higher than it was in 2021

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)

- 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)

- 75% somewhat + much higher
Government Policies Still Viewed As Greatest Barrier to Business Travel

What is the single greatest barrier to business travel?

- Company policies restricting employees from traveling (24%)
- Government policies that restrict travel or make it difficult (e.g., entry restrictions or mandatory quarantines) (6%)
- Employee unwillingness/reluctance to travel (6%)
- Travel budget freeze/cost savings (9%)
- Our offices aren't fully open (9%)
- Other
- Not sure

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*

- **Policy uncertainty:** Policies frequently change; a traveler can book a trip to a foreign country today but face new requirements at the time of travel (72%)
- **Strict requirements:** Policies impose strict requirements on international visitors (e.g., mandatory quarantines or testing within 24 hours of departure) (69%)
- **Policy inconsistency:** Different countries have different policies and requirements for international visitors (64%)
- **Bureaucratic requirements:** Policies require travelers to fill out forms, provide documentation, and complete paperwork (45%)
- **Lack of portable test kits** (23%)
- **Other** (8%)

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

- 68% of companies have canceled or suspended most (50%) or all (18%) international trips.
- 29% of companies have canceled or suspended most (24%) or all (5%) domestic travel within their own country.

Are companies planning to resume travel to...?

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)