

Coronavirus Recovery Poll Results

October 21, 2021

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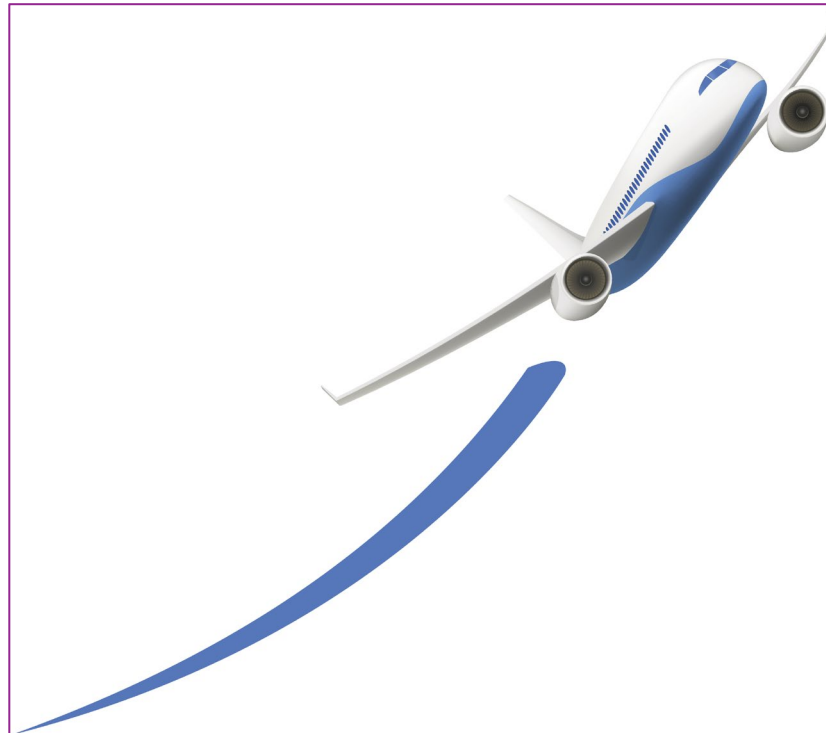


Methodology

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

- Fielding took place from October 4 through October 13, 2021
- An email invitation was sent to 15,951 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, 503 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

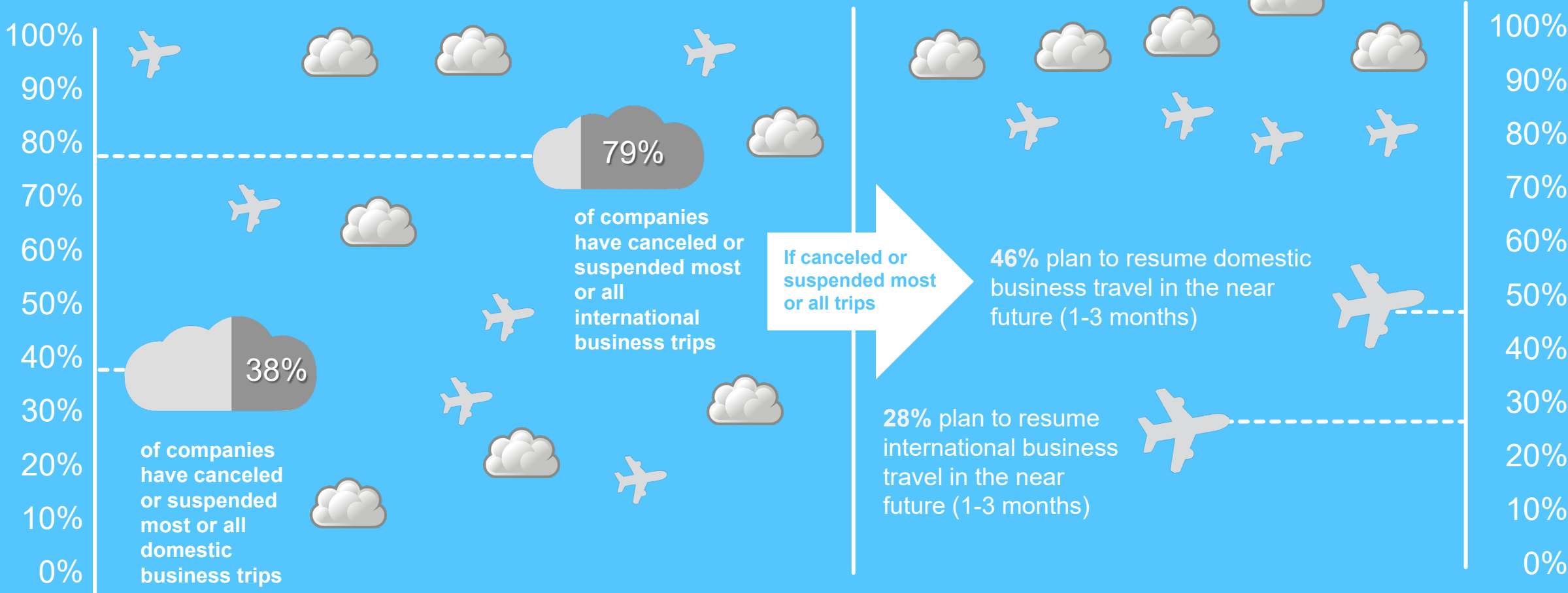
The State of Business Travel





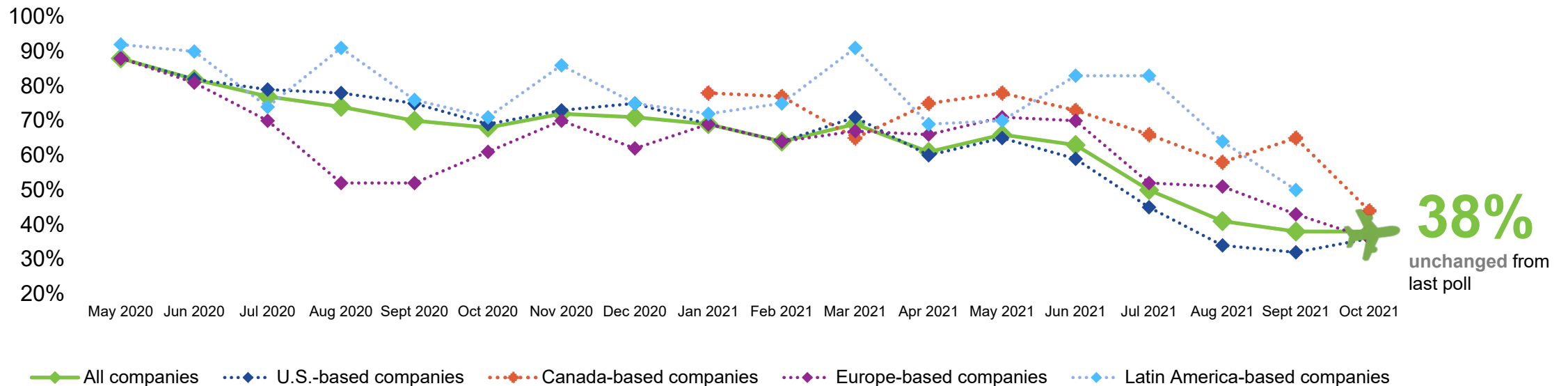
The State of Business Travel

October 2021



The State of Domestic Business Travel

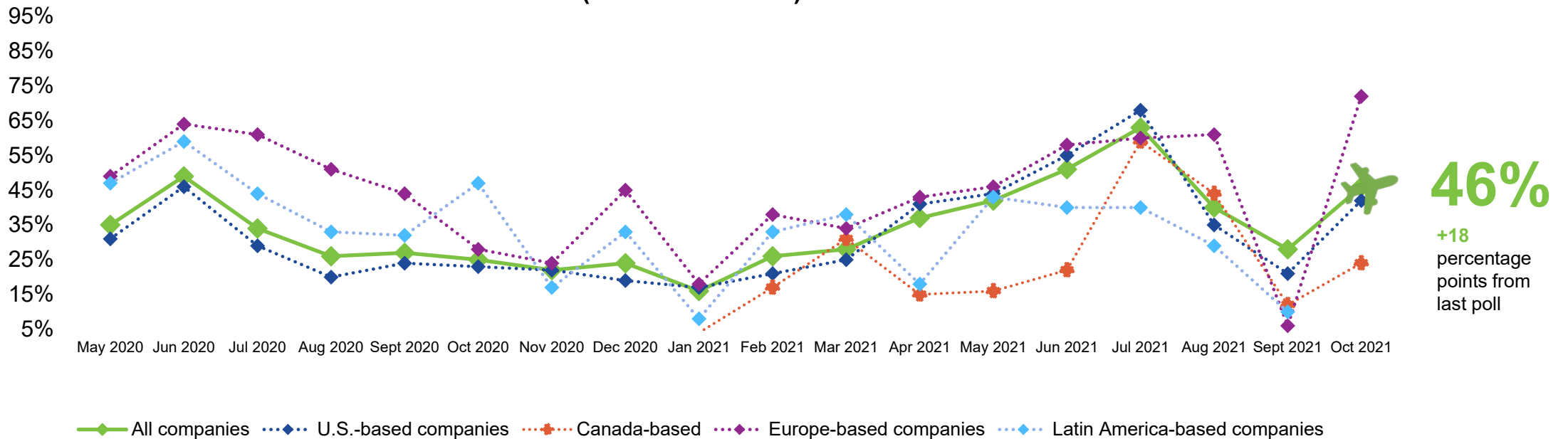
% of companies that have canceled or suspended most or all domestic business travel within their country



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)*

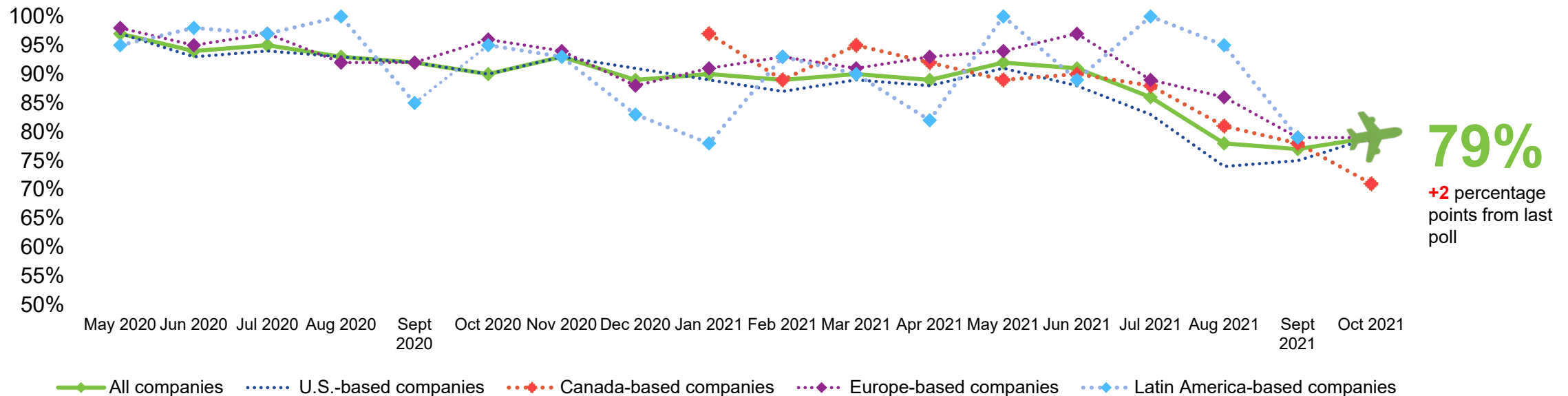


*figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)



The State of International Business Travel

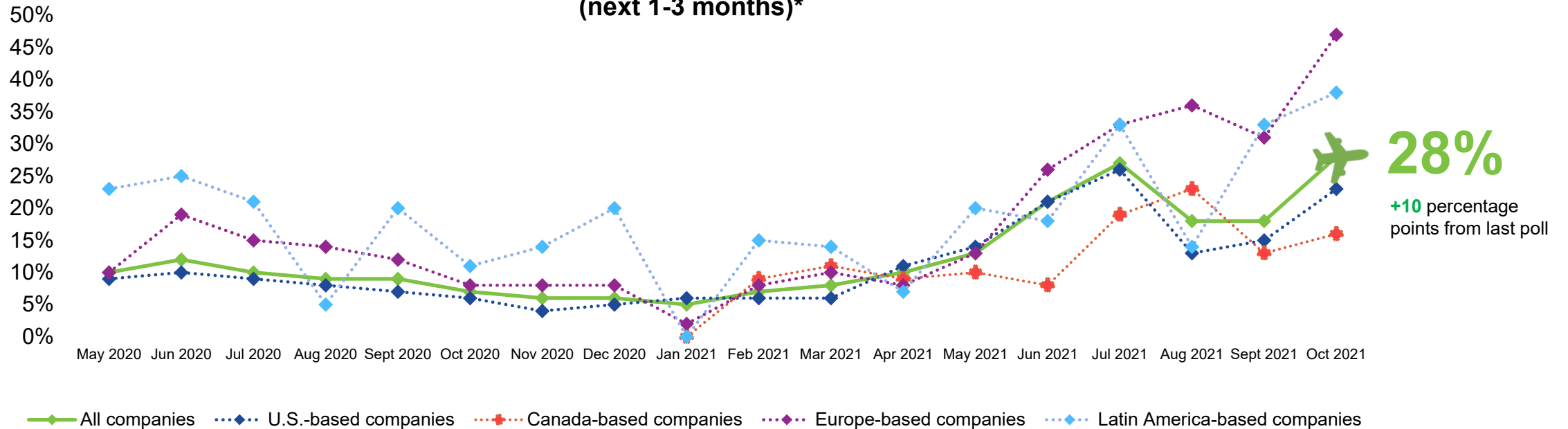
% of companies that have canceled or suspended most or all international business travel



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)*

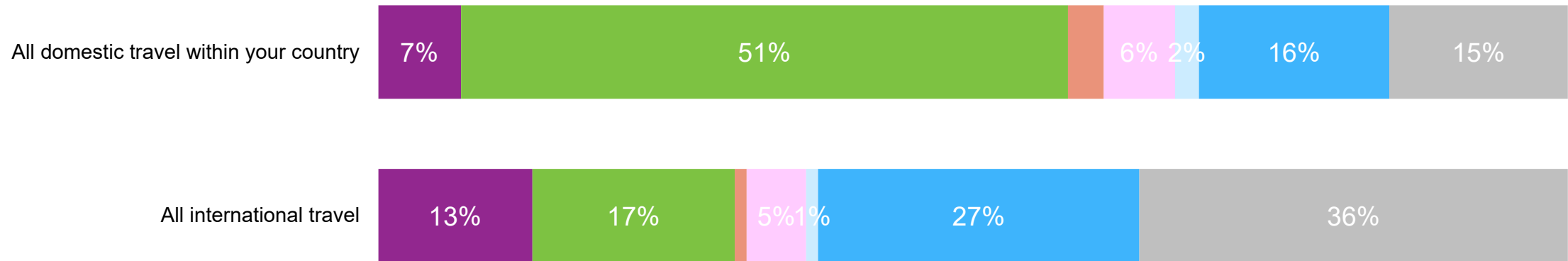


*figures are among those that indicated their company has canceled or suspended most or all international business trips
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)

What's the Specific Timeline?

When do companies specifically plan to resume business travel?

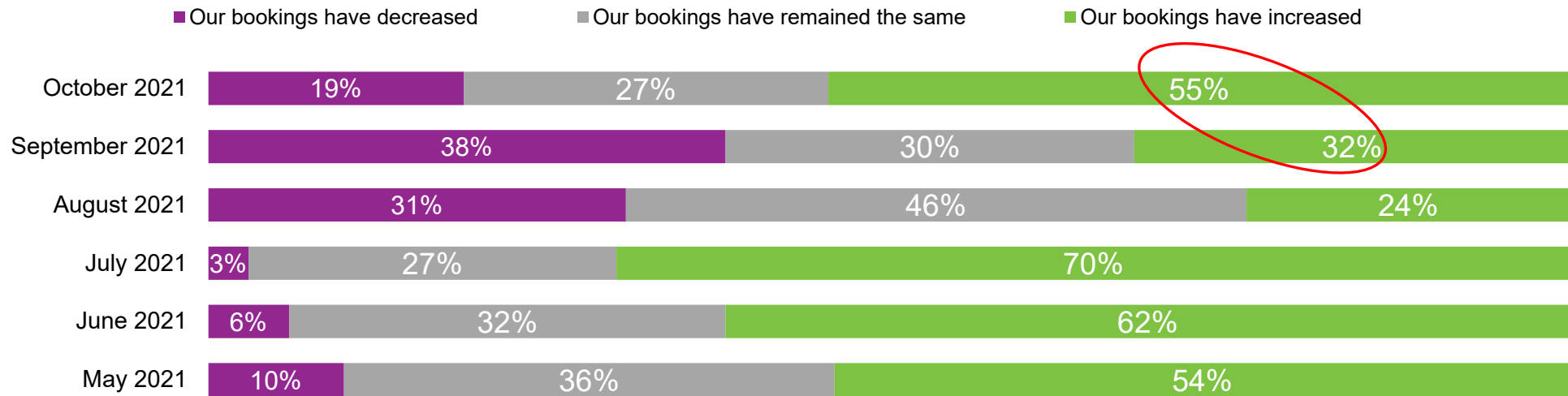
■ Not yet decided but discussing when to resume ■ Already resumed ■ October 2021 ■ November 2021 ■ December 2021 ■ 2022 ■ Not sure



Q. When does your company expect to resume the following types of business trips specifically? (n=434-437)

After a Soft September, Business Travel Bookings Bounce Back in October

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

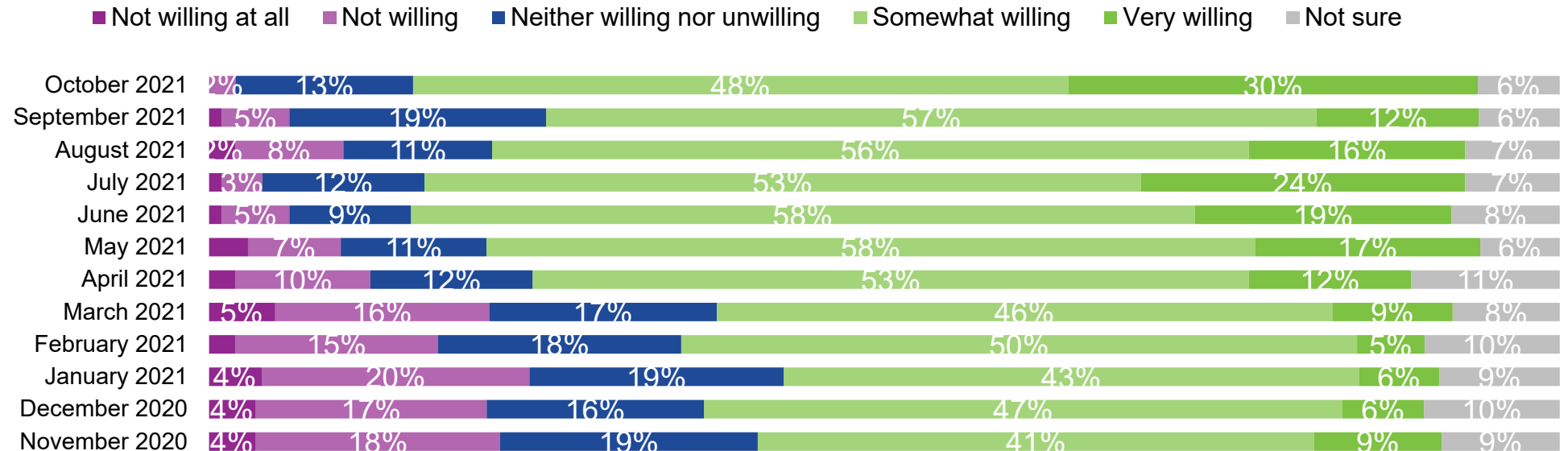


Note: Question only displayed to respondents who work for an airline, hotel chain, hotel property, TMC or ground transportation company

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.**

Employee Willingness to Travel Ticks Up

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?

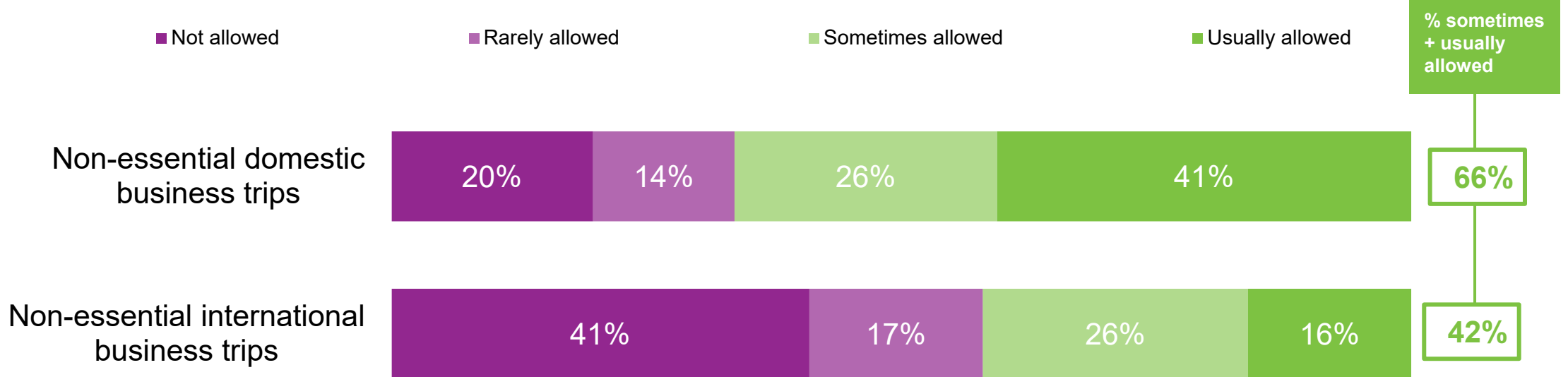
Note: Only displayed to travel managers/ procurement professionals (n=278-448)

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=429-463)

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

A Large Majority of Respondents Have Been Personally Vaccinated

Are you vaccinated against COVID-19?

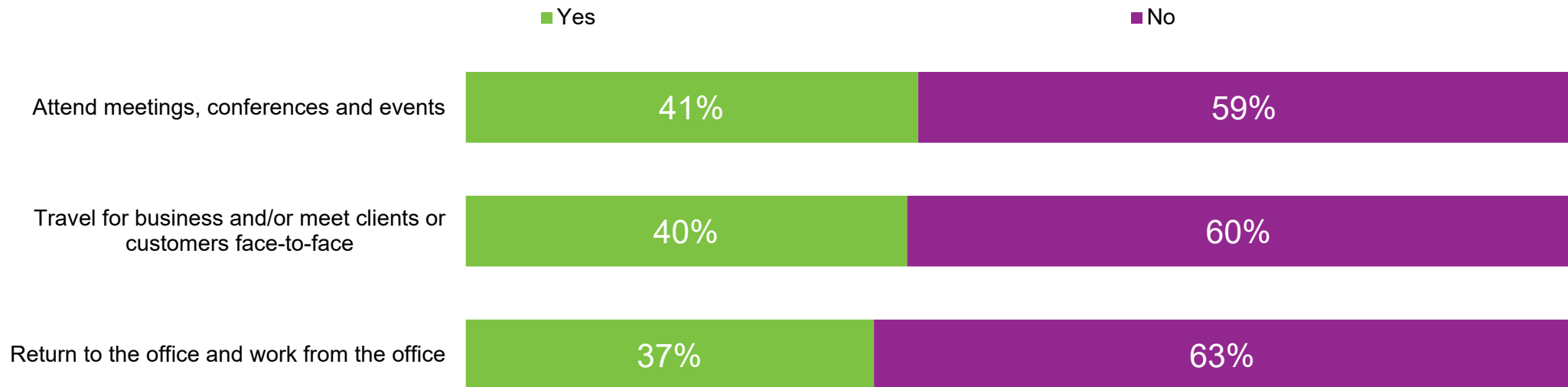
■ No ■ Yes - partially vaccinated ■ Yes - fully vaccinated ■ Prefer not to say



Q. Are you vaccinated against COVID-19? (n=467)

Most Respondents Still Say Their Company Will Not Require Vaccines for Business Travel

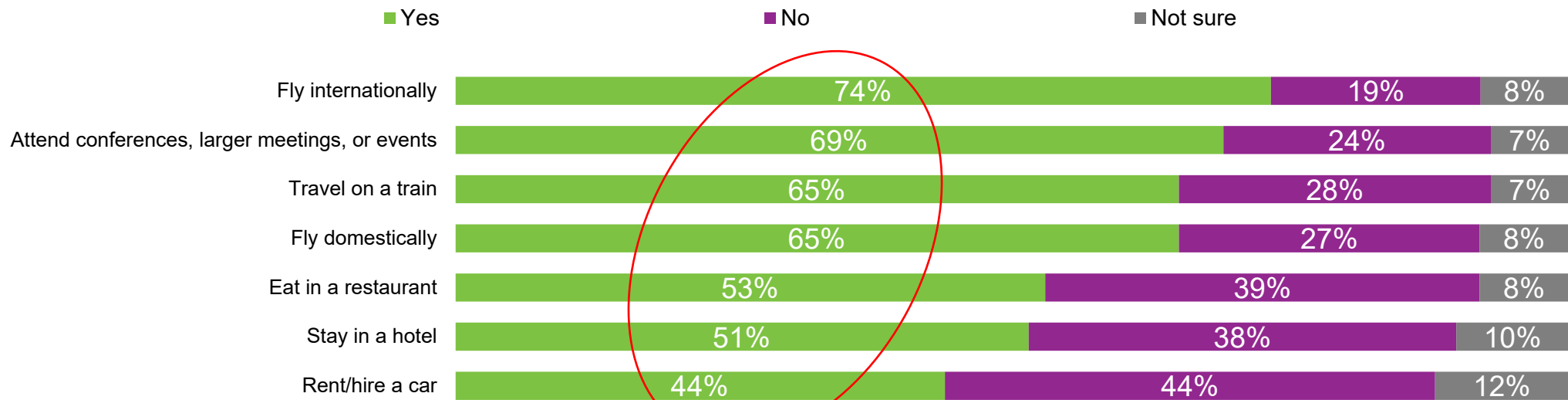
Does your company require employees to be fully vaccinated in order to...?



Q. : Does your company require employees to be fully vaccinated to... (n=410-425)

Strong Support for Government Vaccination Mandates for Travel and Dining

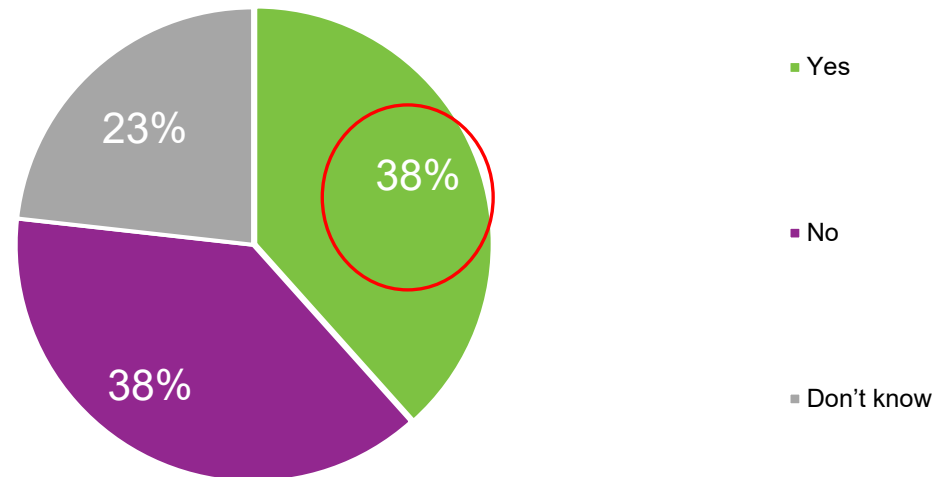
Do you support government policies that require proof of full vaccination in order to...?



Q. Do you support government policies that require proof of full vaccination to do the following: (n=457-459)

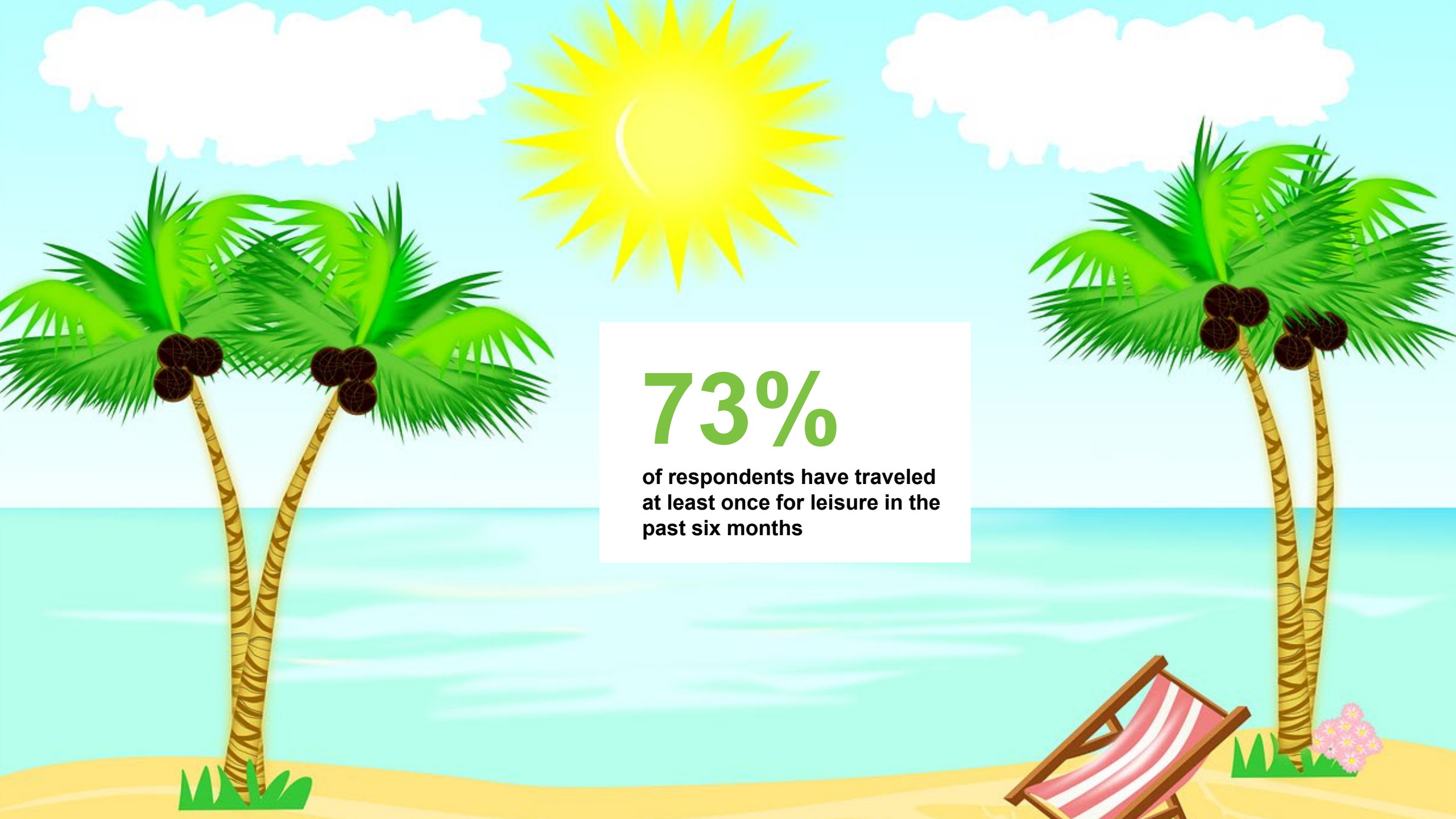
Only Some Travel Buyers Are More Likely to Contract With Suppliers That Require Vaccines

Are travel buyers more likely to contract with suppliers who require guests or passengers to prove they are vaccinated against COVID-19?



Q. Thinking about your travel program, are you more likely to contract with suppliers who require guests and/or passengers to prove they are vaccinated against COVID-19 as a requirement to travel or enter a venue?

Note: Question only displayed to travel buyers/procurement professionals (n=252)

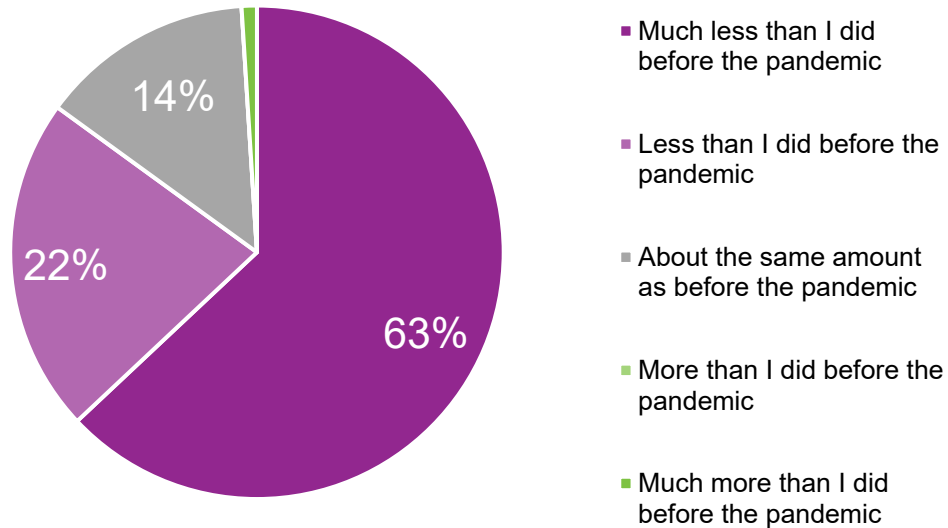


73%

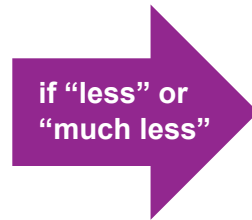
**of respondents have traveled
at least once for leisure in the
past six months**

Many Respondents *Miss* Traveling for *Work*

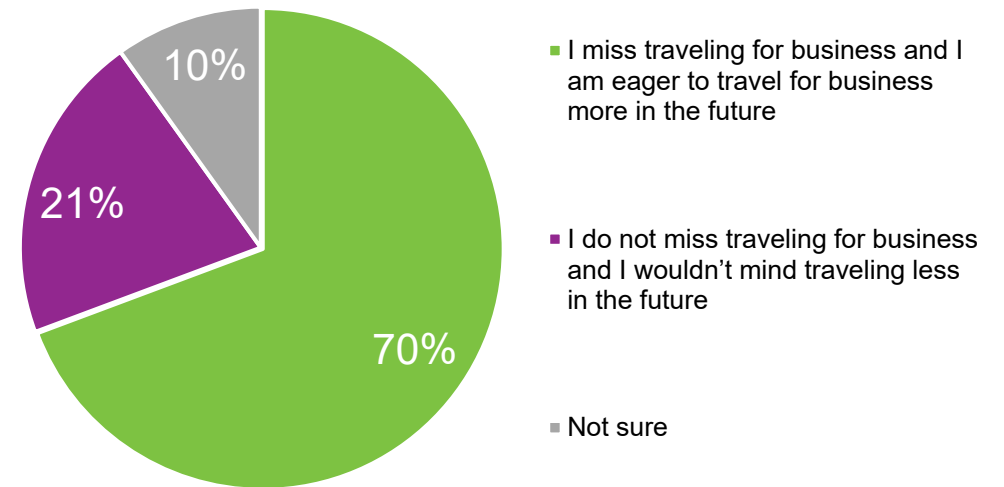
How often do respondents travel for work currently?



Q. Which of the following best describes how often you personally travel for business currently? (n=453)



How do respondents feel about business travel?



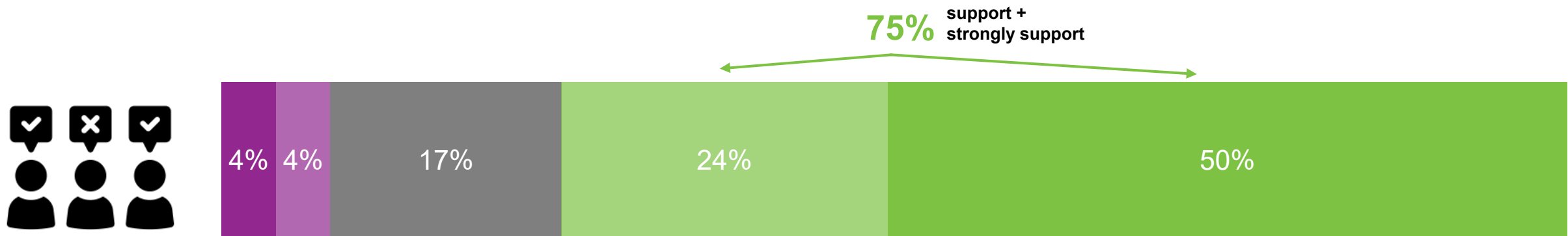
Q. You mentioned you travel for business less than you did before the pandemic. Which of the following best describes how you feel?

Note: Question only displayed to respondents who indicate they currently travel for business "less" or "much less" than they did before the pandemic (n=384).

Strong Support for New Policy on International Travel

How do respondents view Biden administration's new policy to open borders for many international visitors?

■ Strongly disapprove ■ Disapprove ■ Neutral ■ Support ■ Strongly support

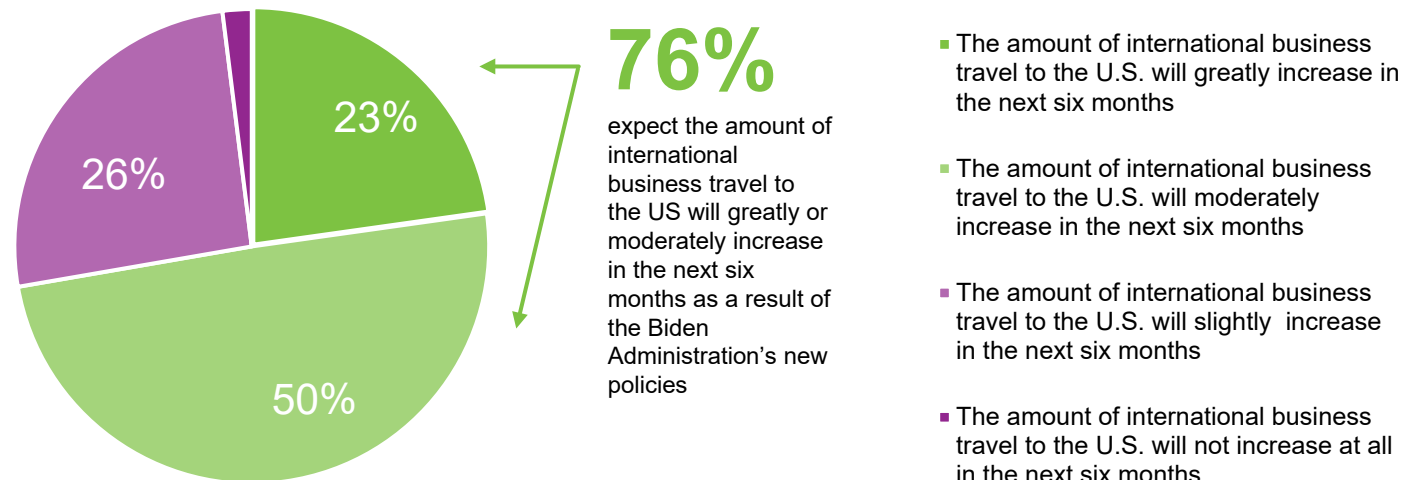


Q. The Biden Administration recently relaxed restrictions on international travel to the United States. The new policy allows passengers from 33 countries to enter the U.S. assuming they (1) provide documentation and are fully vaccinated against COVID-19 and (2) test negative for COVID-19 within three days of their travel departure. To what extent do you support or disapprove of the Biden Administration's opening up borders after 18 months with these new requirements for international visitors to the United States?

Note: Question only displayed to U.S.-based respondents (n=307)

U.S.-Based Travel Suppliers Are Optimistic New Policies Will Boost Business Trips to the US

As a result of the Biden Administration's new requirements for international travel, do you think...?



Q. As a result of the Biden Administration's new requirements for international travel, do you think...?

Note: Question only displayed to U.S.-based travel suppliers/TMC employees (n=113)

More Than Half of Respondents Are Concerned About Passport and Visa Delays

Are respondents concerned that passport and visa delays will delay for their company's employees?

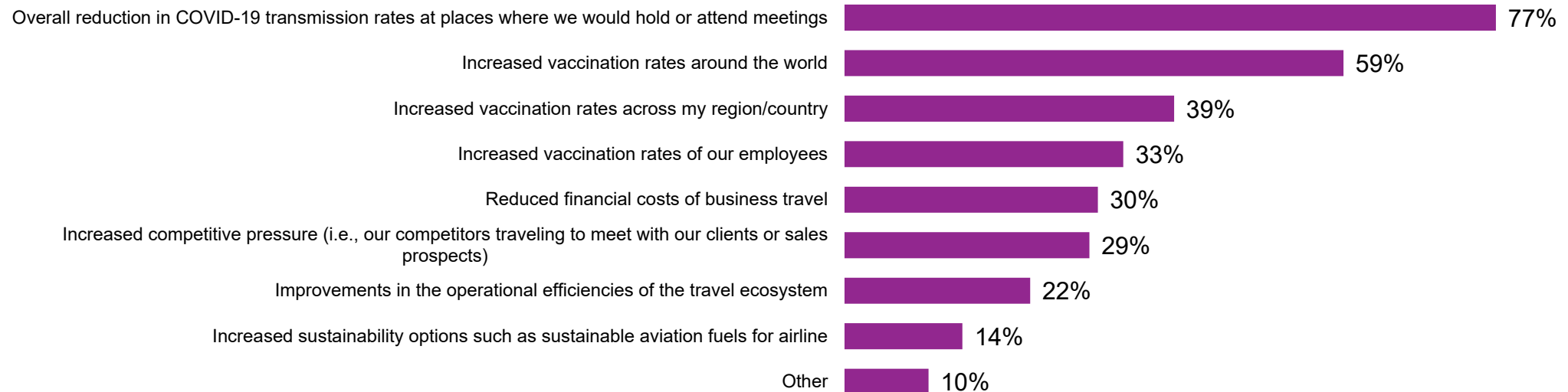
■ Not at all concerned ■ Not too concerned ■ Neither concerned nor unconcerned ■ Concerned ■ Very concerned ■ Don't know



Q. How concerned are you about delays for issuing passports and visas for your employees to resume international business travel? (n=458)

Declining COVID Cases Could Accelerate the Return of Business Travel

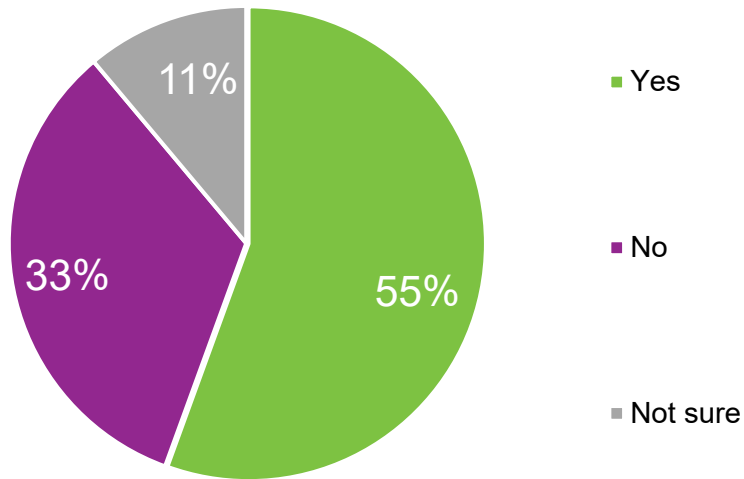
What will accelerate the return of business travel at your company?
multiple answers allowed



Q. What do you think will accelerate the volume of business travel at your company? **Please select all that apply.**
Note: Question only displayed to travel buyers/procurement professionals (n=249).

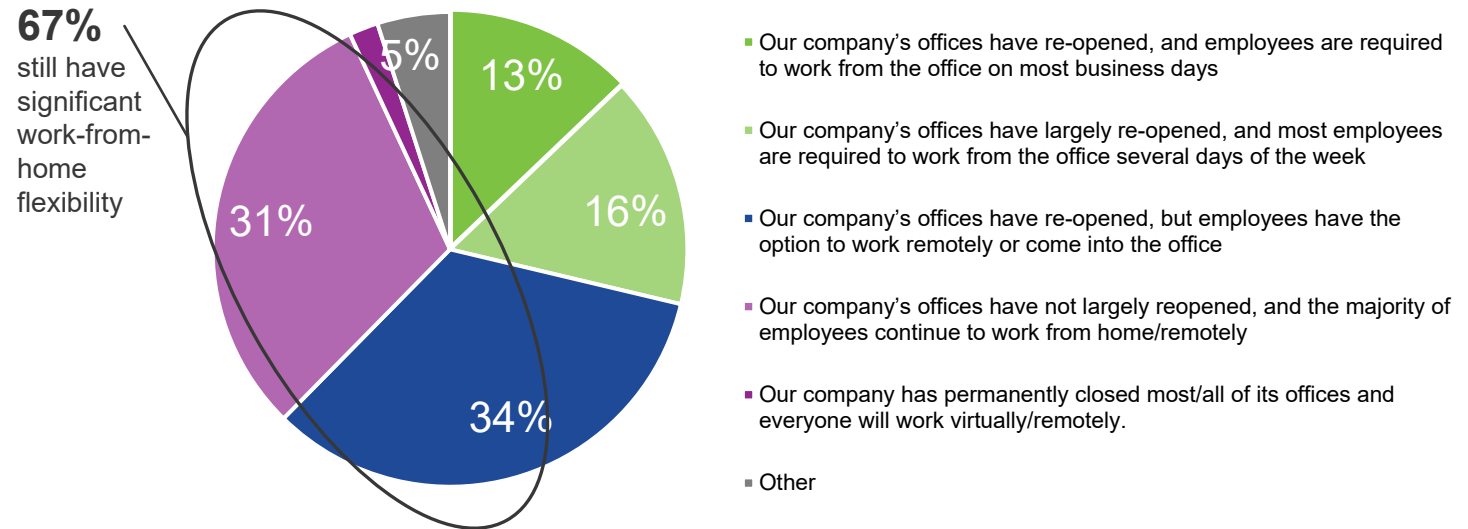
Offices Begin to Reopen – But Most Employees Still Have the Option to Work From Home

Do companies treat office re-openings consistently across all locations?



Q. Does your company/organization treat office re-openings consistently across all locations? (n=480)

Which best describes office reopening status at majority of company's locations?



Q. Which of the following best describes the current status of your company's office re-opening for the majority of its locations? (n=469)

Almost Half of Companies Plan to Resume Domestic Business Travel in the Near Future

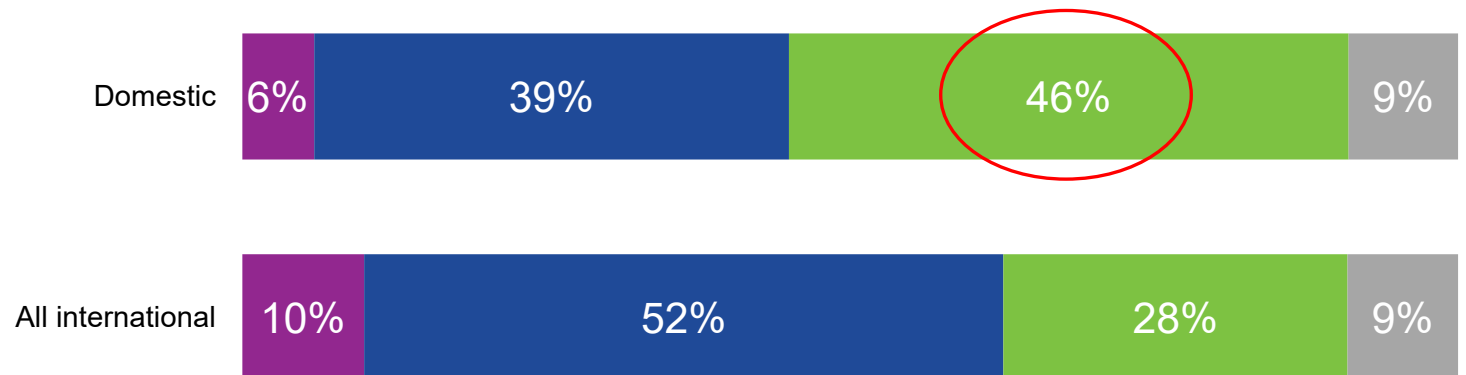
 **79%**
of companies have canceled or suspended **most** (52%) or **all** (27%) international trips

 **38%**
of companies have canceled or suspended **most** (32%) or **all** (6%) 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. Thinking about your company, how has the coronavirus impacted business travel to... ? (n=390-424)

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=157-300)