

Coronavirus Recovery Poll Results

February 28, 2022

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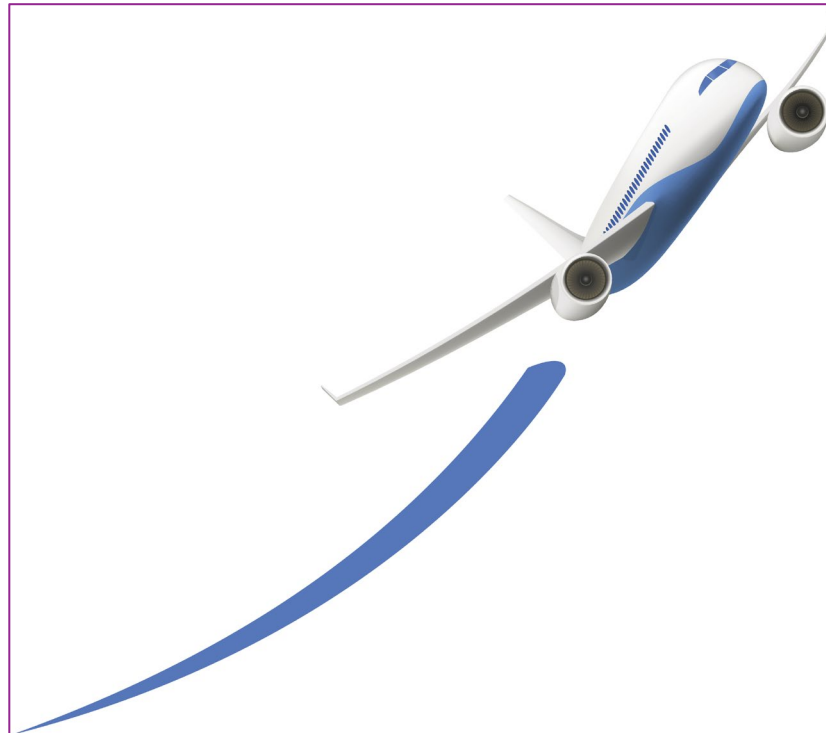


Methodology

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

- Fielding took place from February 7 through February 14, 2022
- An email invitation was sent to 15,970 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, 461 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

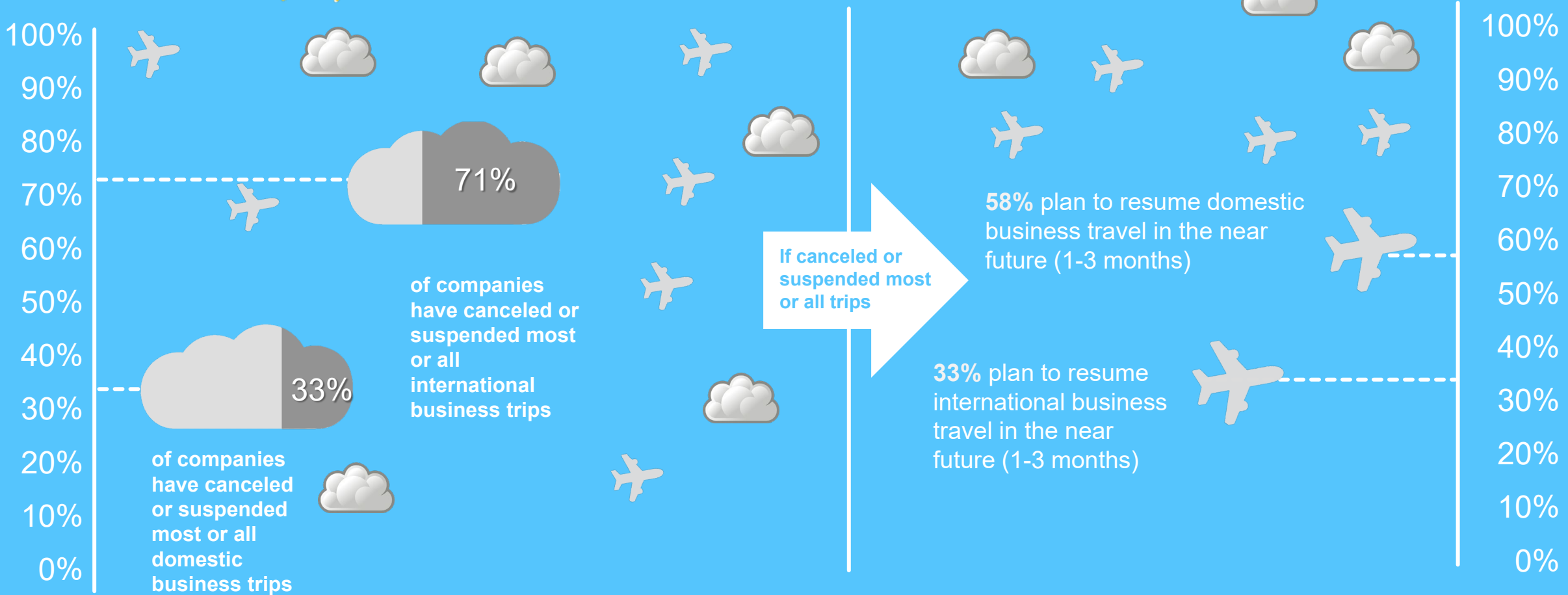
The State of Business Travel



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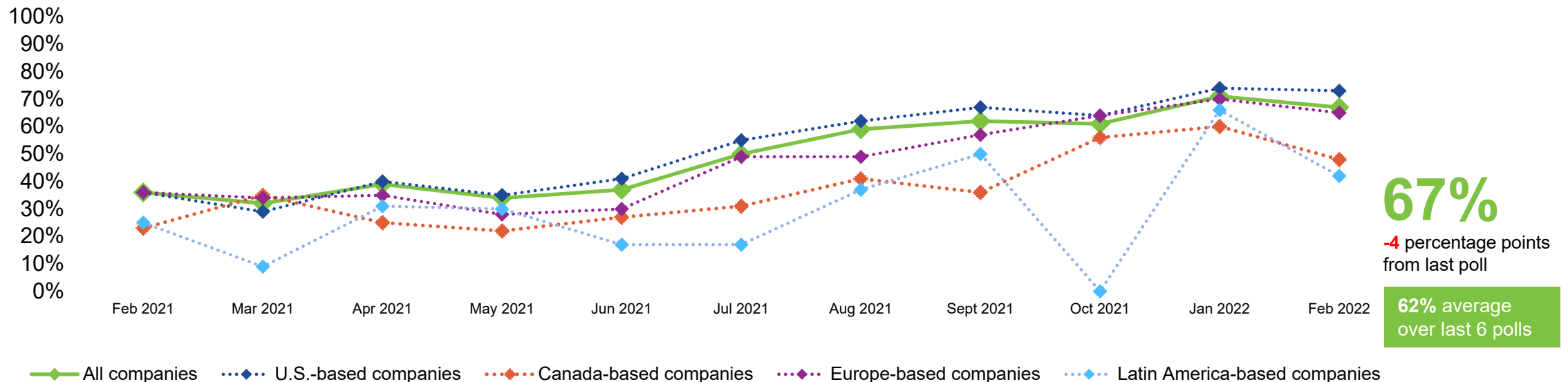
February 2022

Most companies have resumed domestic travel – or plan to in near future



The State of Domestic Business Travel

% of companies allowing some or more domestic business travel within their country

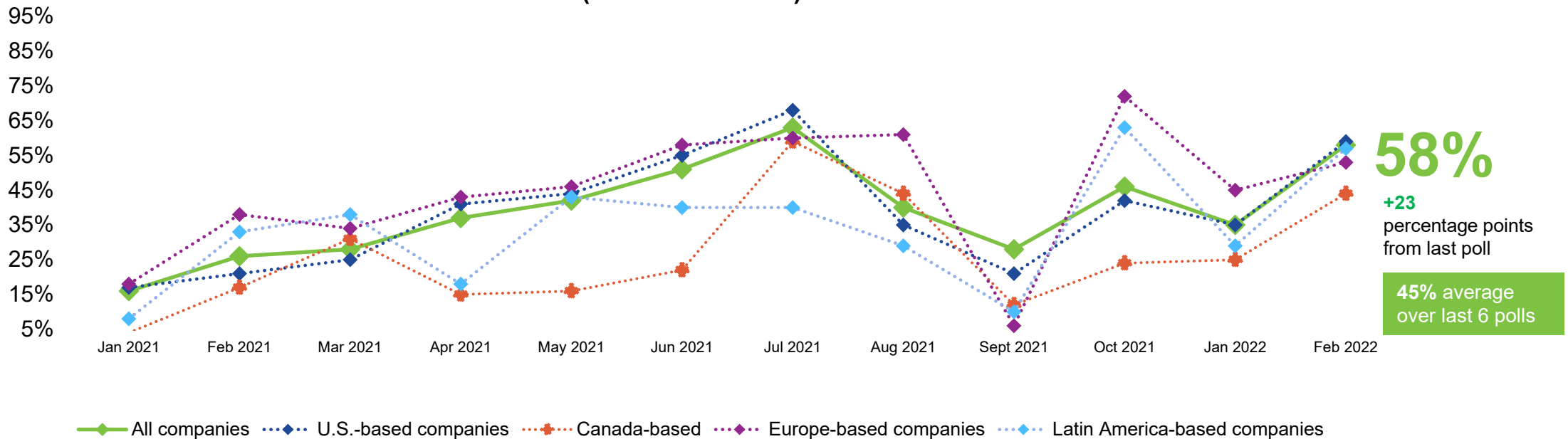


Note: The GBTA Coronavirus Poll wasn't conducted in November and December, 2021
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)



The State of Domestic Business Travel (Cont.)

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



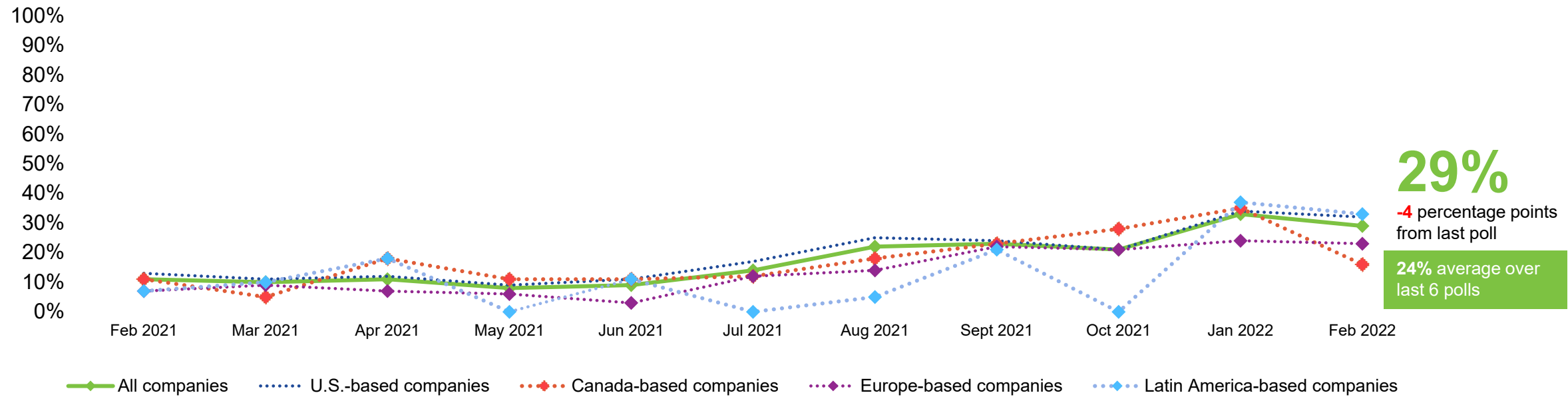
*Figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country

*Note: 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

% of companies allowing some or more international business travel

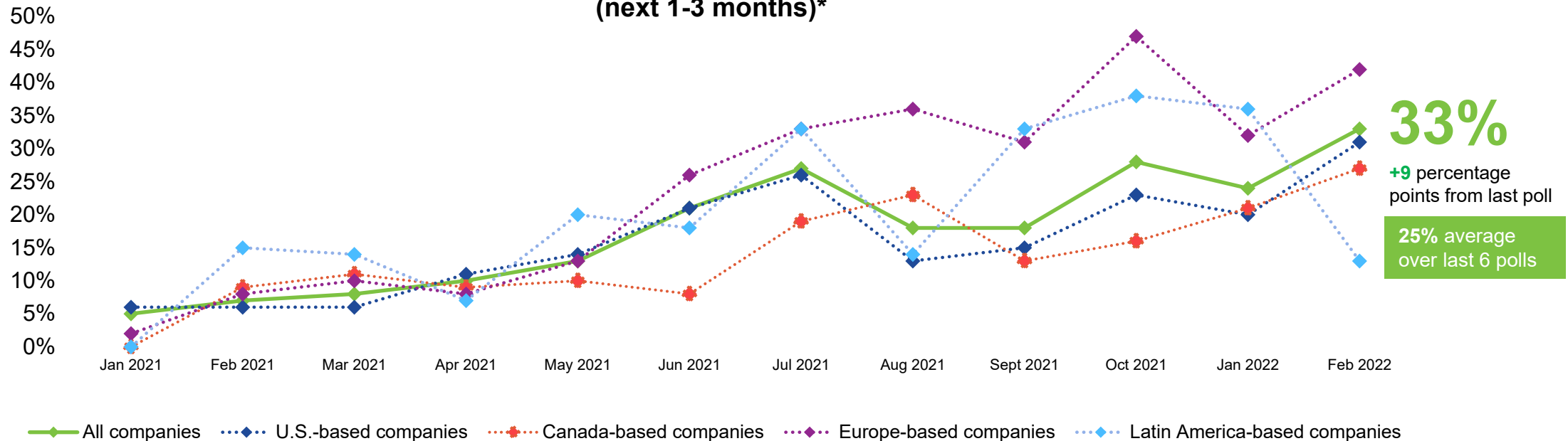


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The State of International Business Travel (Cont.)

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



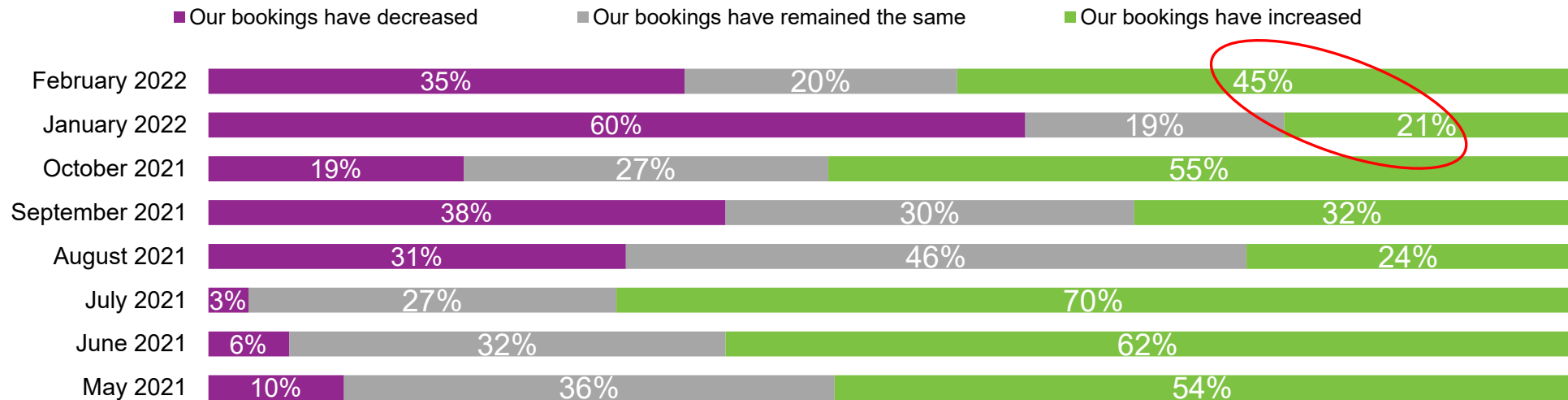
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*Figures are among those that indicated their company has canceled or suspended most or all international business trips

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As Omicron Wanes, Future Business Travel Bookings Tick Back Up

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

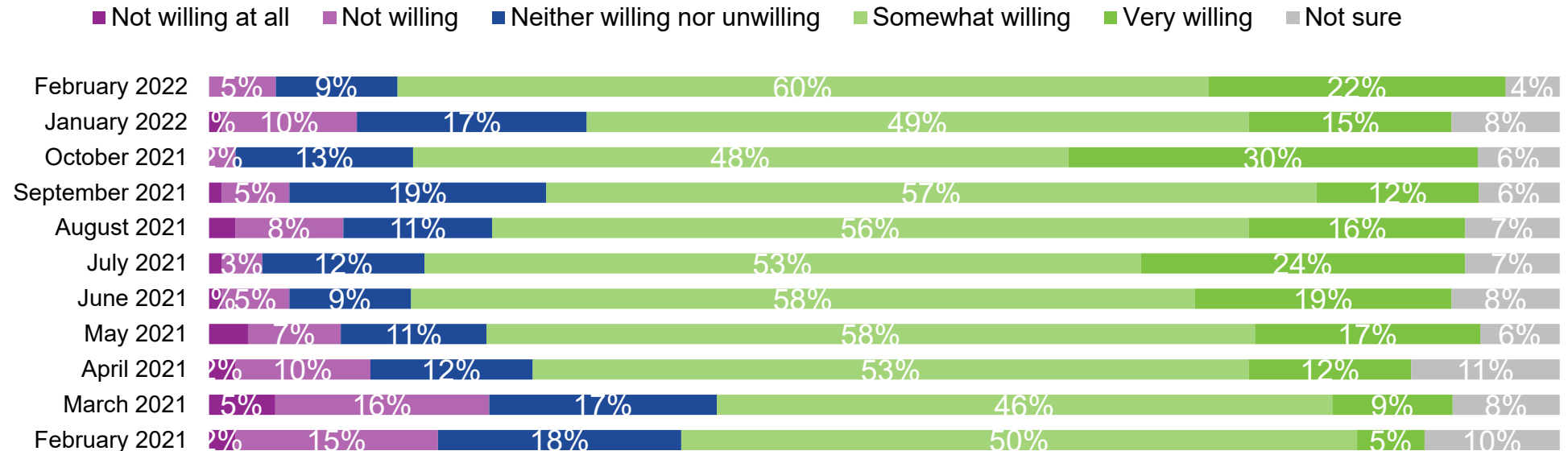


Note: Question only displayed to respondents who work for an airline, hotel chain, hotel property, TMC or ground transportation company

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=137-158) **Note: Before September 2021, this question asked how about how bookings changed in the past week.**

Employee Willingness to Travel Bounces Back

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



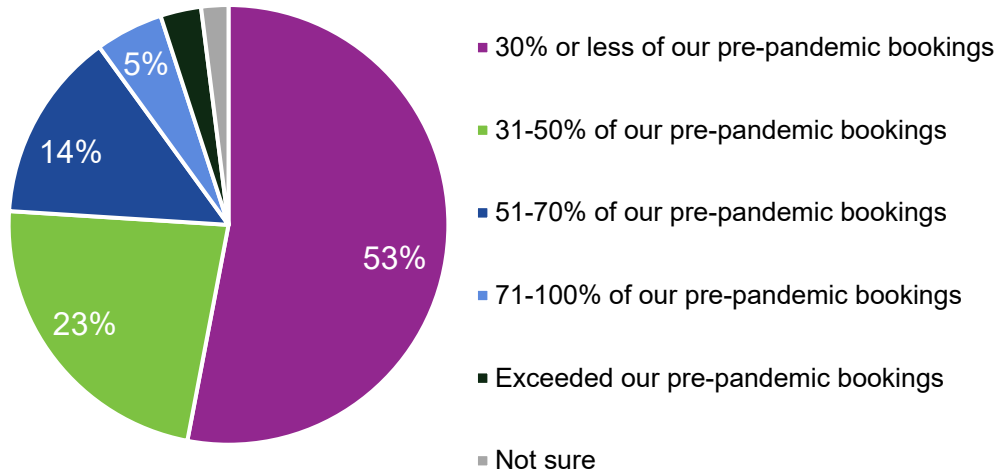
Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=244-448)

Business Travel Remains Considerably Below Pre-Pandemic Peak

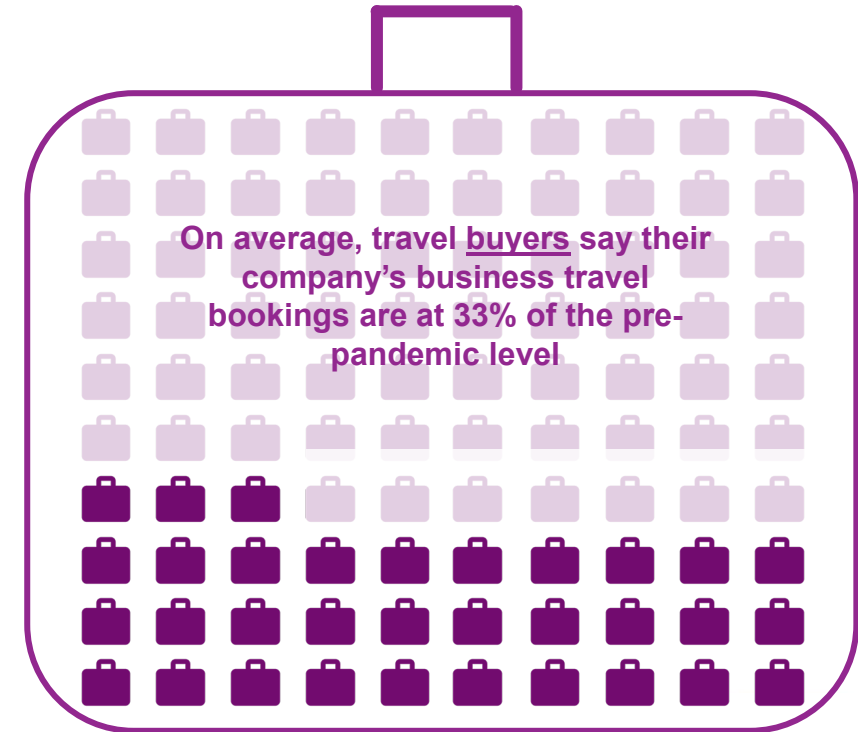


Would you say your company is currently at...?



Q. Thinking about your company's current business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...?

Note: Only displayed to travel buyers/procurement professionals;
Note: Respondents were given ranges in 10-point intervals; these were combined into groups to make interpretation easier



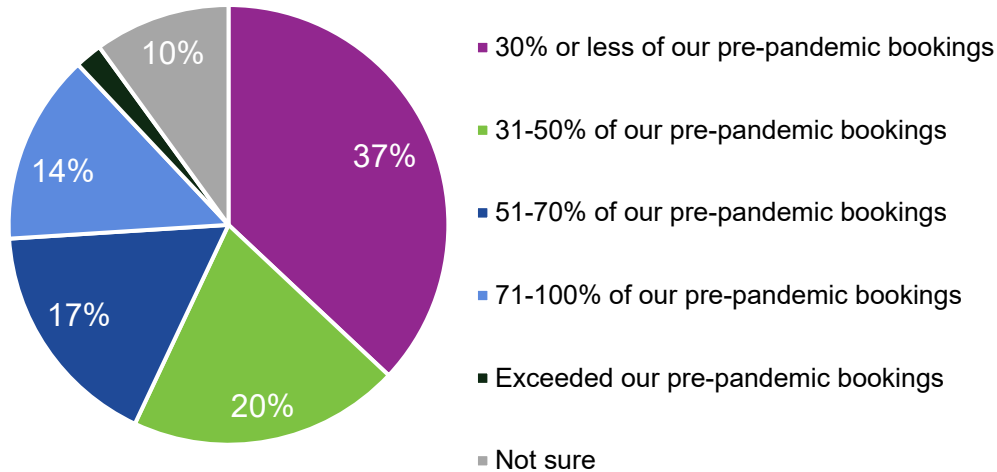
Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Business Travel Remains Considerably Below Pre-Pandemic Peak (Continued)



Travel Suppliers

Would you say your company is currently at...?



Hotel California

On average, travel suppliers say their company's business travel bookings are at 42% of the pre-pandemic level



Q. Thinking about your company's current bookings from business travel, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

Note: Only displayed to travel supplier/TMC professionals;
Note: Respondents were given ranges in 10-point intervals; these were combined into groups to make interpretation easier

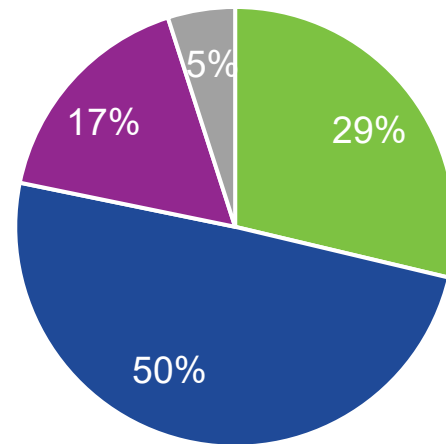
Note: This average is an estimate. Respondents were given ranges in 10-point intervals and the average was calculated using the midpoints of these ranges

Key Highlights



Respondents Feel Worst of Omicron Is Behind Us – But Business Travel Might Recover Slowly

How will the Omicron variant impact corporate travel in the next three months?



- The worst of the Omicron variant is behind us and business travel will quickly pick up in the next three months
- The worst of the Omicron variant is behind us but business travel will pick up slowly in the next three months
- The Omicron variant will continue to weigh on business travel recovery in the next three months
- Not sure

Q. Thinking about the Omicron variant, which of the following best describes your near-term expectations for business travel over the next three months? (n=436)

While Some Wish to Travel Less Post-Pandemic, Most Hope to Return to Their Pre-Pandemic Frequency of Business Travel

How much would you prefer to travel for business in the future?

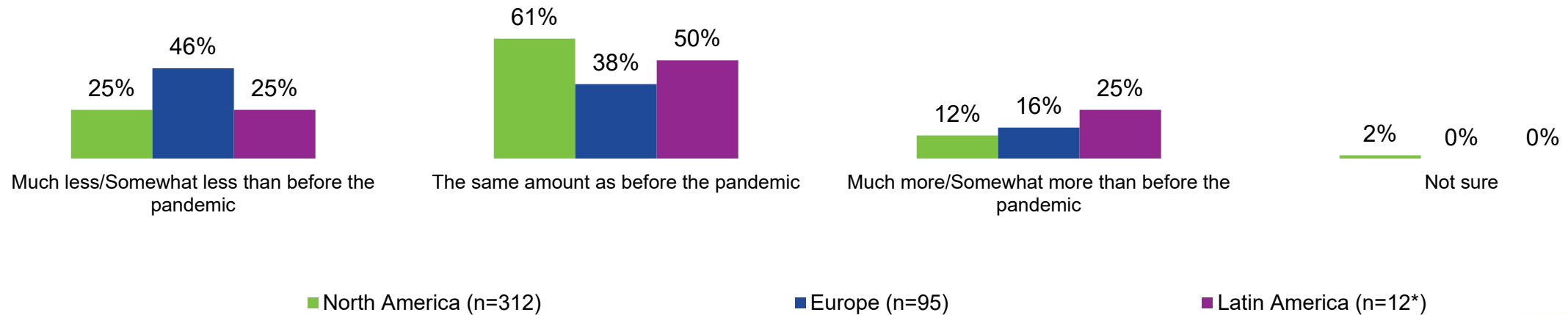
■ Much less than I did before the pandemic ■ Somewhat less ■ The same amount ■ Somewhat more ■ Much more than I did before the pandemic ■ Not sure



Q. How much would you prefer to travel for business in the future? (n=430)

In Europe, Greater Appetite to Travel Less for Business

How much would you prefer to travel for business in the future?
by region



Q. How much would you prefer to travel for business in the future? (n=430)

Has the Pandemic Created Greater Interest in “Bleisure” Trips? Not Necessarily

Are business travelers at your company more interested in traveling for “bleisure” than they were before the pandemic?

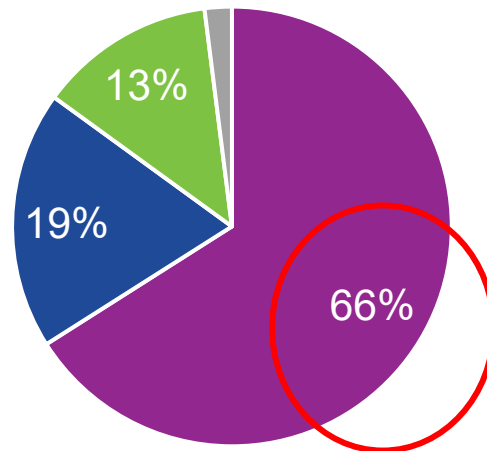
Note: Question only displayed to travel buyers/procurement professionals



Q. Compared to before the pandemic, do you think employees at your company are more or less interested in extending work trips for leisure (i.e., taking "bleisure" trips)? **Note: Question only displayed to travel buyers/procurement professionals (n=254)**

After Layoffs and Furloughs, Many Business Travel Companies Have a Smaller Employee Base

Thinking about your company, which of the following best describes its employee base currently?
travel suppliers/TMC employees only



- Somewhat smaller/Much smaller than before the pandemic
- The same size as before the pandemic
- Somewhat larger/Much larger than before the pandemic
- Not sure

Q. Thinking about your company, which of the following best describes its employee base currently?

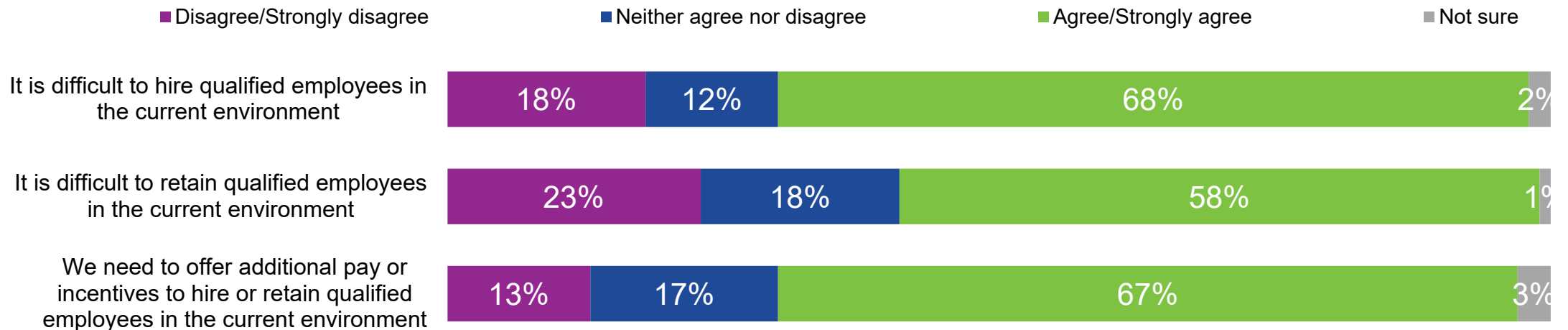
Note: If your company acquired another company—or was acquired—during the pandemic, please do not include the employees from the acquired subsidiary or parent. ?

Note: Results filtered to only show travel suppliers/TMC employees (n=150)

Will the Labor Shortage Make It Difficult for Travel Companies to Re-Staff?

Do travel suppliers agree...?

Note: Question only displayed to travel suppliers/TMC employees

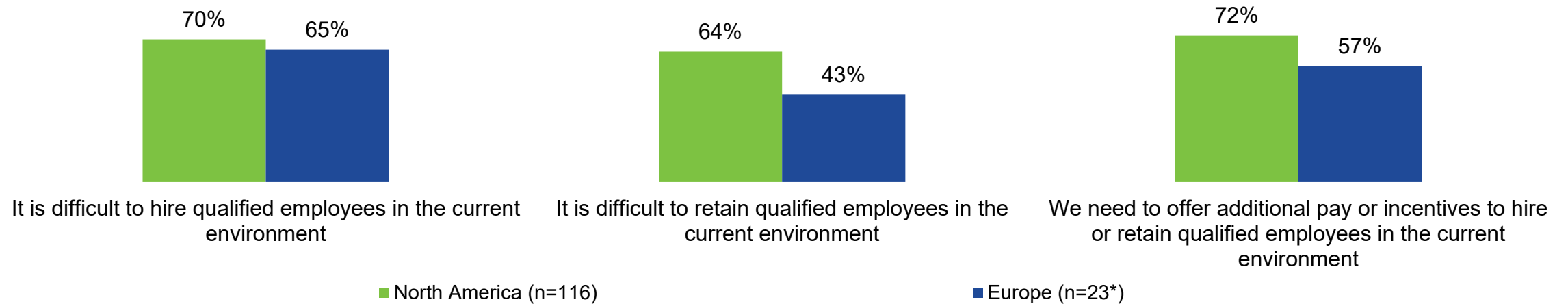


Q. Thinking about your company specifically, please rate your agreement with the following.

Note: Question only displayed to travel managers/procurement professionals (n=150)

Labor Shortages Might Be a Bigger Issue in North America

Do travel suppliers agree...?
% "agree" or "strongly agree" by region



Q. Thinking about your company specifically, please rate your agreement with the following.

Note: Question only displayed to travel suppliers/TMC professionals

***indicates small sample size for Europe (n<30)**

One-Third of Respondents Feel Their Country's Entry Requirements for International Visitors Are Too Strict

How would you rate your country's entry requirements for international visitors (non-citizens)?

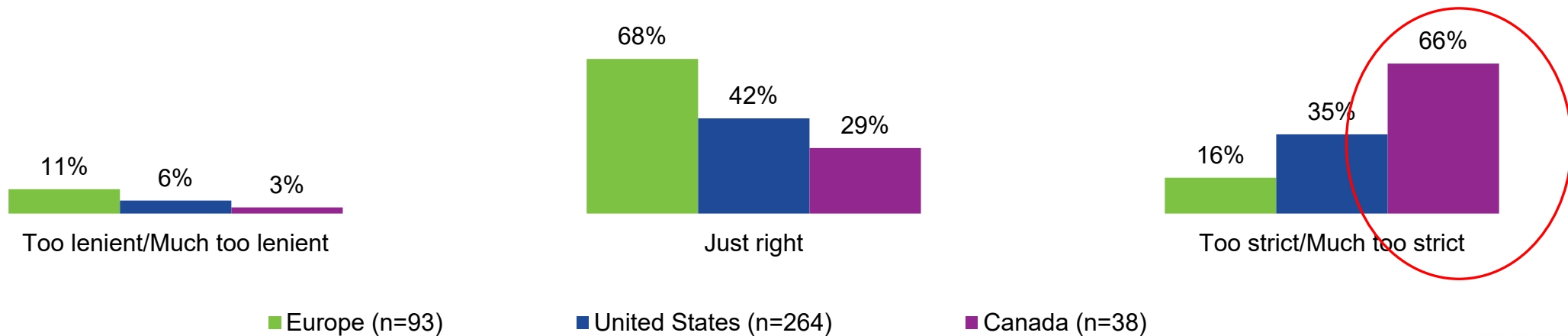
■ Too lenient/Much too lenient ■ Just right ■ Too strict/Much too strict ■ Not sure



Q. How would you rate your country's entry requirements for international visitors (non-citizens)? (n=419)

Canada-Based Respondents Overwhelmingly Feel Their Country's Entry Requirements Are Too Strict

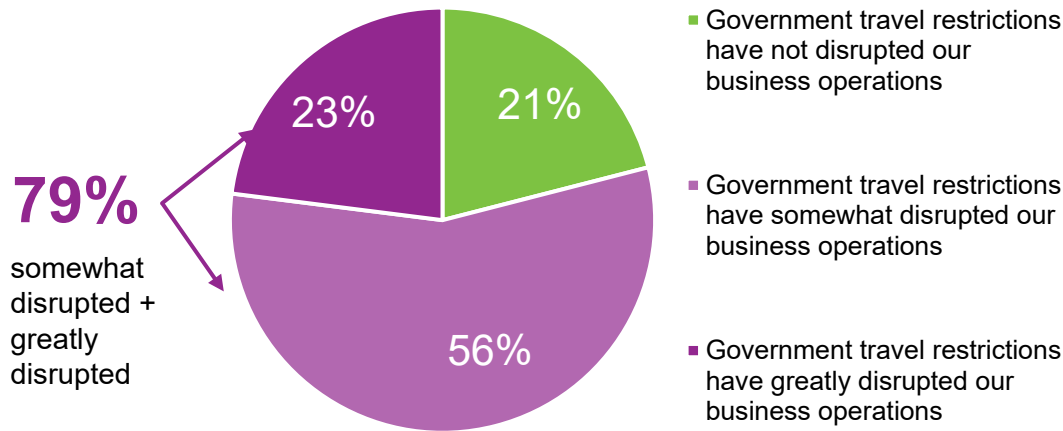
How would you rate your country's entry requirements for international visitors (non-citizens)?
by region/country



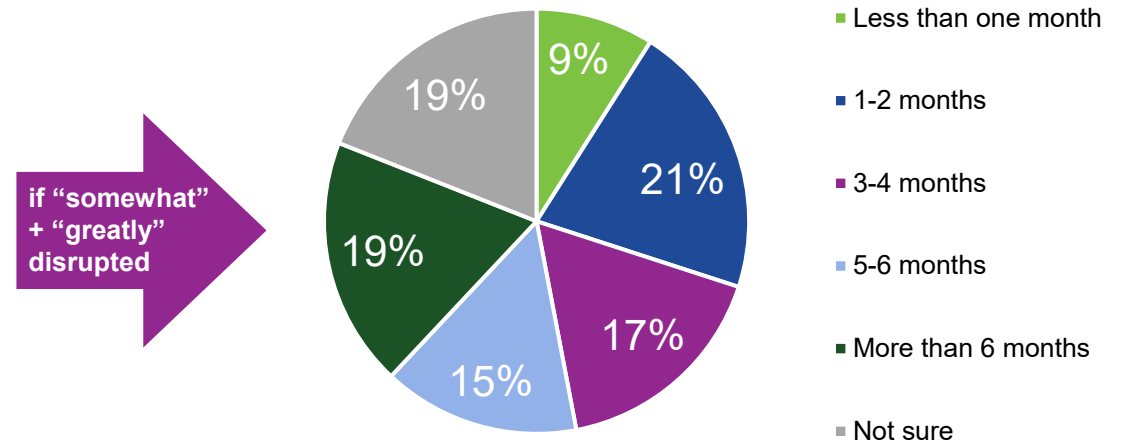
Q. Thinking about your company specifically, please rate your agreement with the following.
Note: Question only displayed to travel suppliers/TMC professionals
***indicates small sample size for Europe (n<30)**

Travel Bans Disrupt Business – and It Can Take Months to Recover

Which best describes your view?
travel managers/procurement professionals only



How Long Will It Take to Return to Normal?



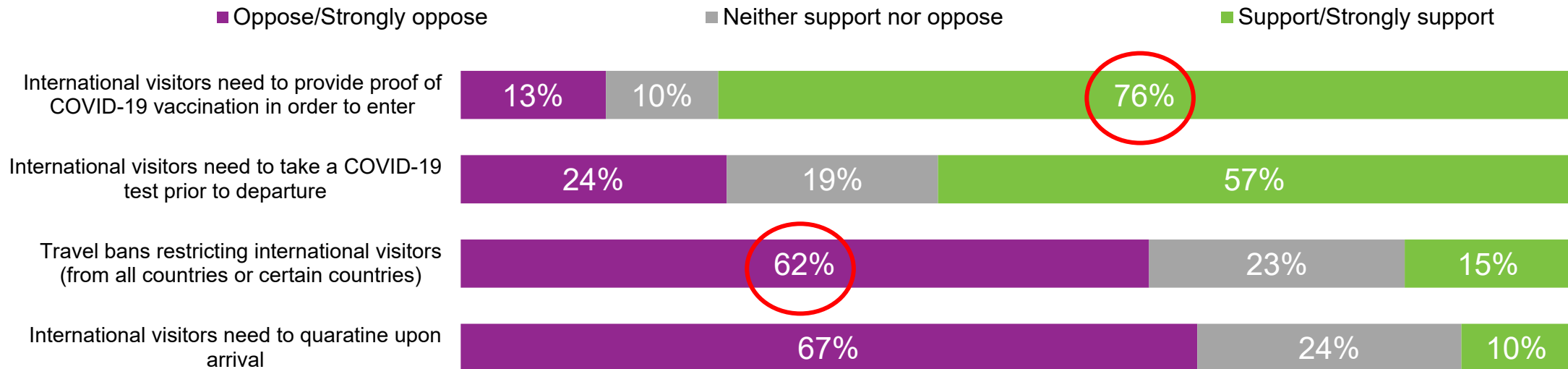
After restrictions are lifted, 51% say it would take 3 months or longer for their company's operations to return to normal

Q. Thinking about your company specifically, which of the following best describes your view?
Note: Question only displayed to travel managers/procurement professionals (n=247)

Q. You mentioned travel bans have hurt business operations. After travel bans have been lifted, how long would it take for your company's business operations to return to normal? Note: Question only displayed to travel managers/procurement professionals who say travel bans have greatly or somewhat disrupted their company's business operations (n=247)

Respondents Support Vaccine Requirements for International Visitors – But Oppose Travel Bans

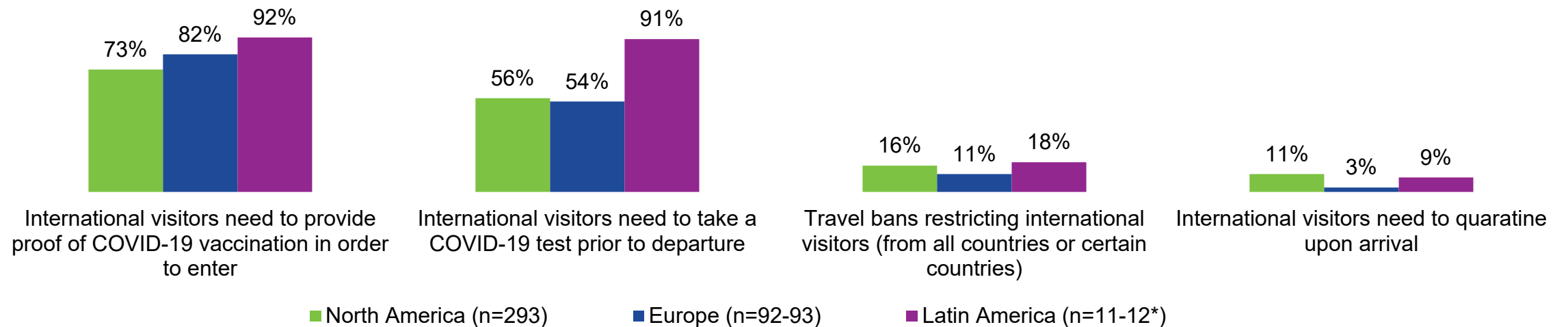
How do respondents feel about different requirements for international visitors (non-citizens)?



Q. How do you feel about the following country-level entry requirements for international visitors (non-citizens)? (n=408-410)

Support for Various Requirements Roughly Consistent Across Regions

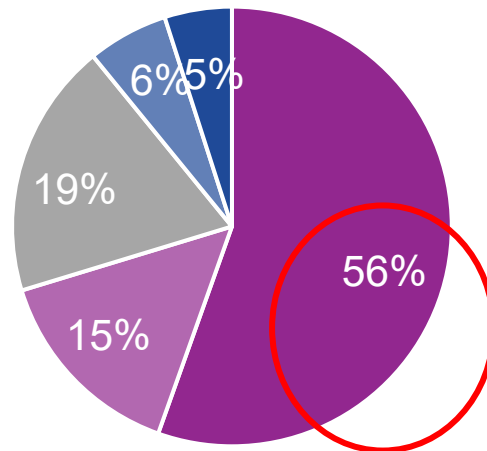
Do respondents support different requirements for international visitors (non-citizens)?
% “support” + “strongly support” by region



Q. : How do you feel about the following country-level entry requirements for international visitors (non-citizens)?

Most Respondents Expect Their Company Will Require Reporting to the Office at Least Some Days

When your company fully reopens its office(s), which of the following is most likely to apply?



- Our company will require most employees to report to the office at least some days
- Our company will prefer that employees report to the office but not require it ; however, it might incentivize reporting to the office (e.g., free lunch or other benefits)
- Our company will not care if employees report to the office or work from home
- Our company will prefer that employees work from home
- Our company will never fully reopen its office

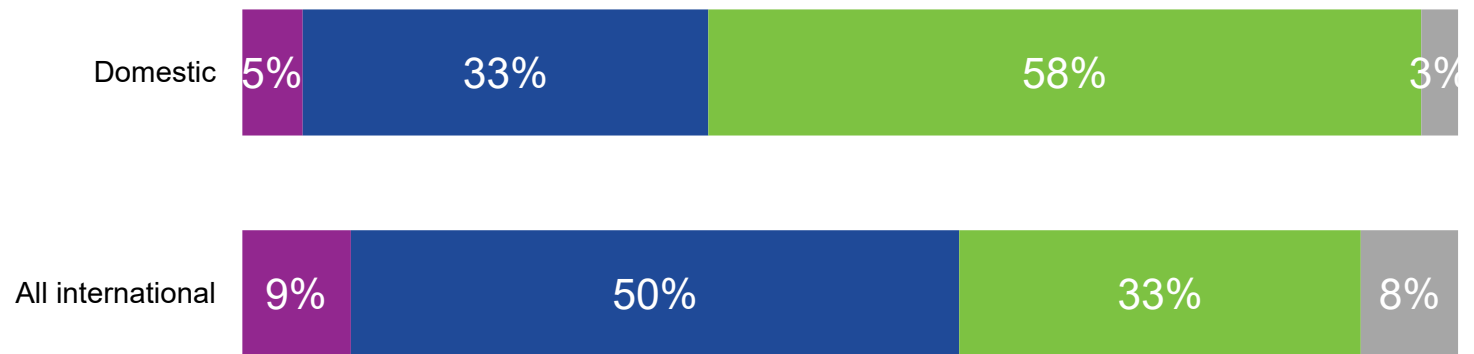
Q. When your company fully reopens its office(s), which of the following is most likely to apply? (n=415)

Only 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=363-)

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=129-257)