

Coronavirus Poll Results

April 22, 2021

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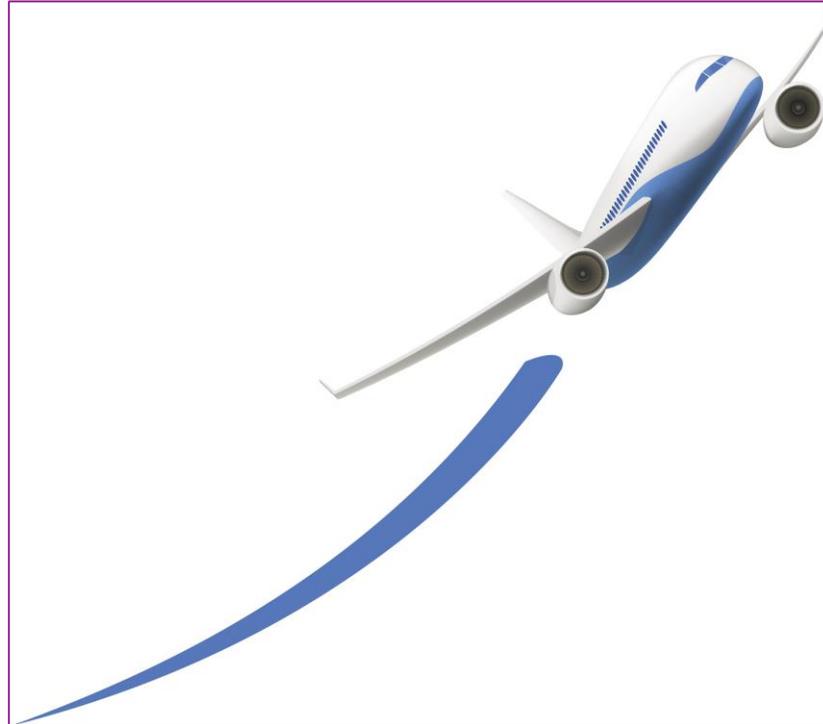


Methodology

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

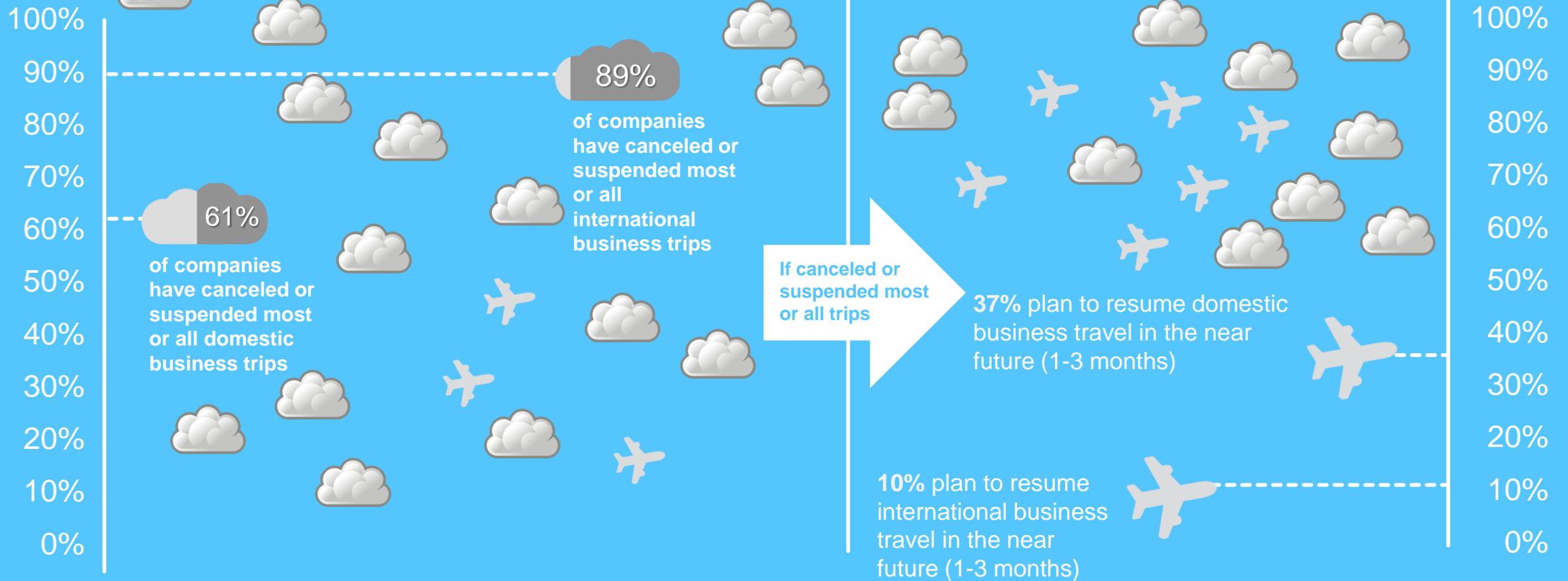
- Fielding took place from April 12 through April 17, 2021
- An email invitation was sent to 16,095 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 942 companies 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



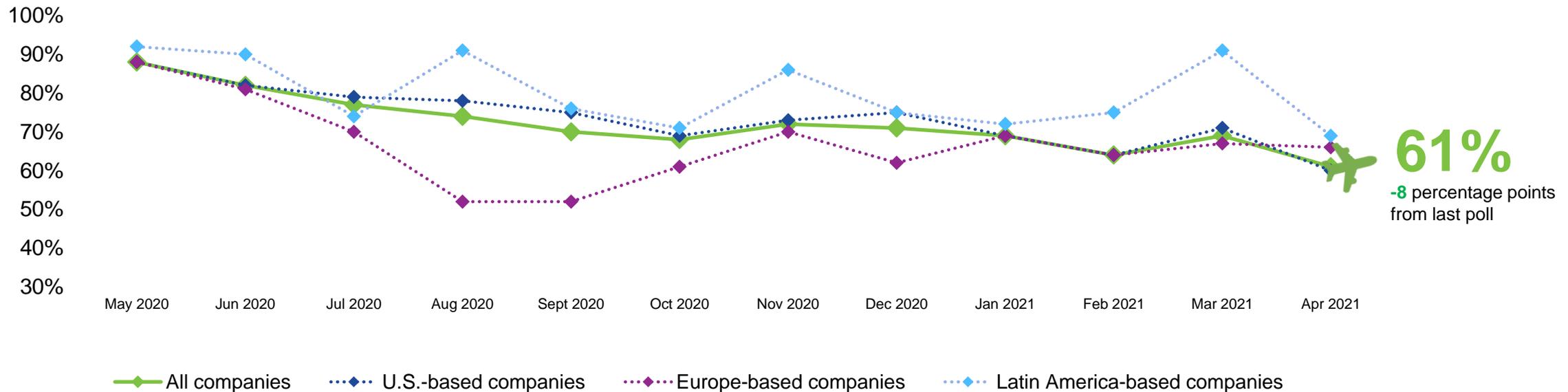
The State of Business Travel

April 2021



The State of Domestic Business Travel

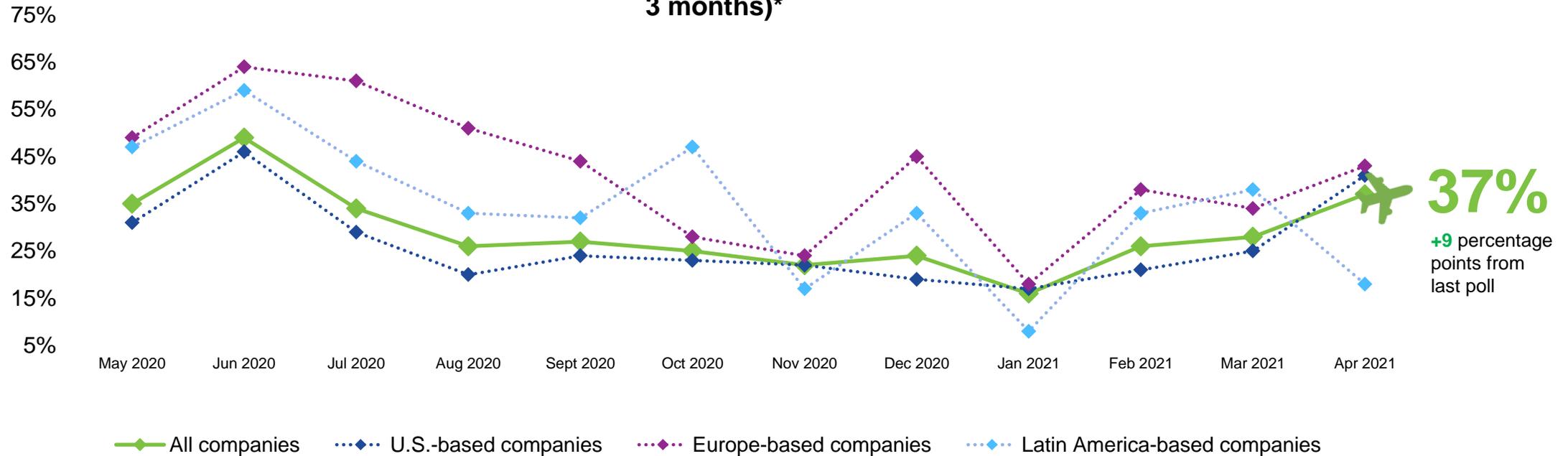
% of companies that have canceled or suspended most or all domestic business travel within their country



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

The State of Domestic Business Travel (Cont.)

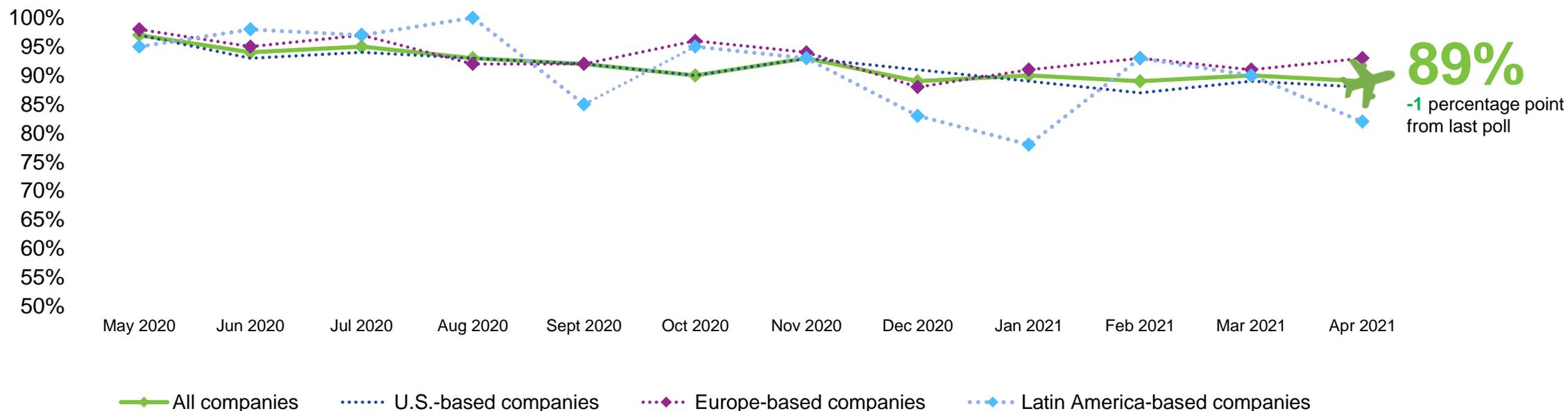
% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*



*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

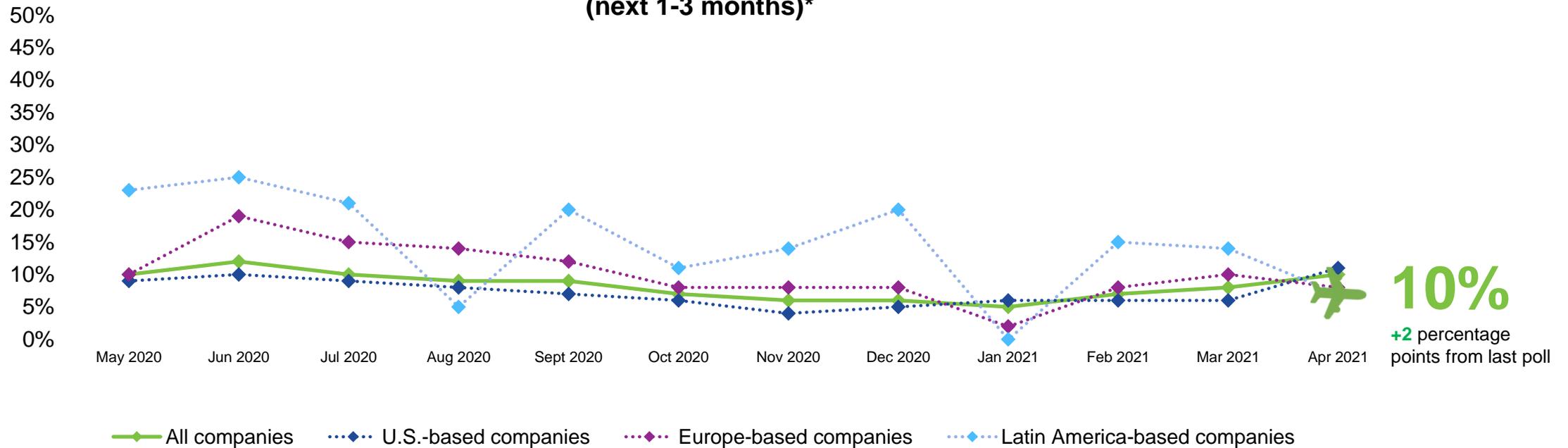
% of companies that have canceled or suspended most or all international business travel



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

The State of International Business Travel (Cont.)

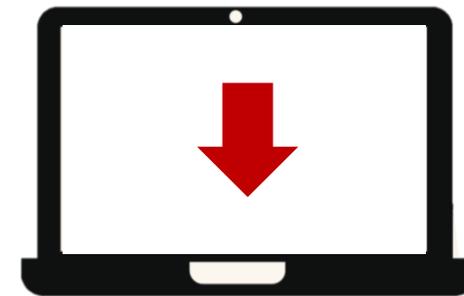
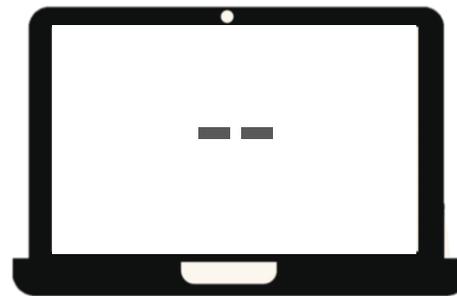
% of companies that plan to resume international business travel in the near future (next 1-3 months)*



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

A Decent Number of Suppliers See Future Bookings Increase

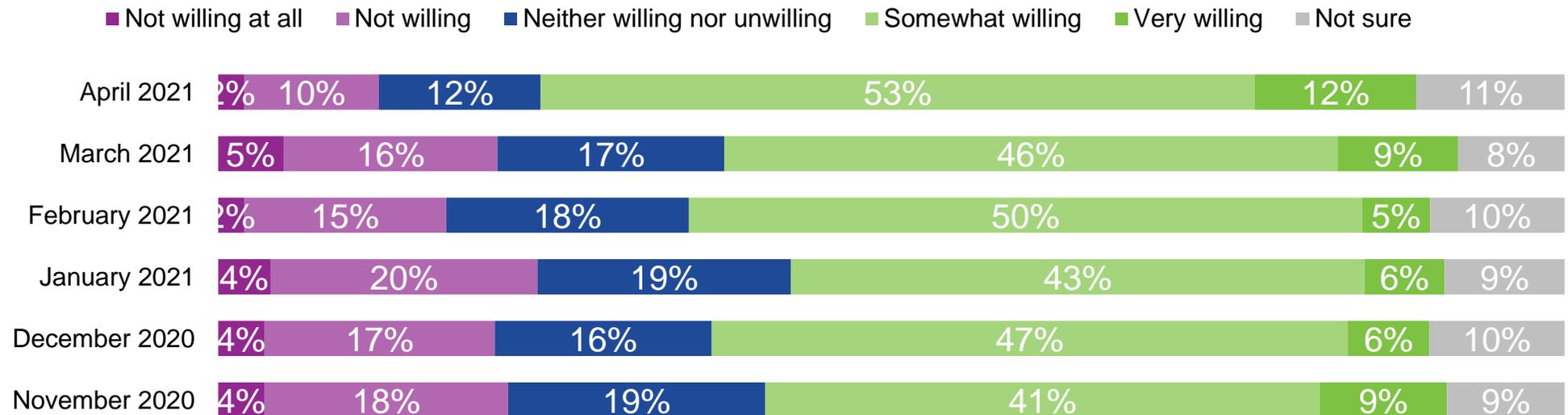
How have bookings from corporate customers changed in the past week?



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

Are Employees Willing to Travel for Work?

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

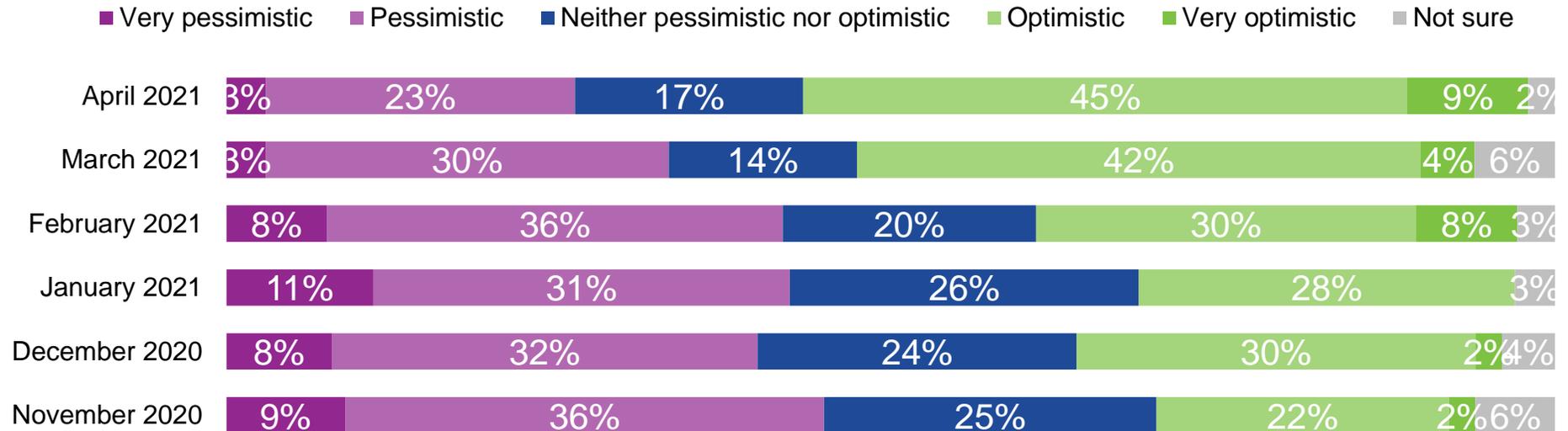


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=314-448)

Business Travel Suppliers More Optimistic About Industry's Near-Term Prospects

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



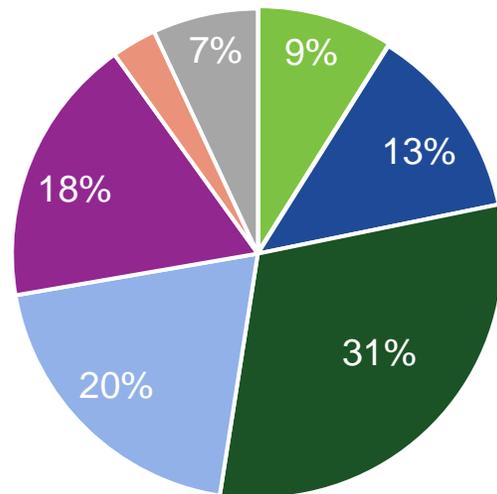
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=227-332)**

Key Highlights



For Many Companies, “Return to Travel” Planning Is Well Underway

Which best describes “return to travel” planning efforts?

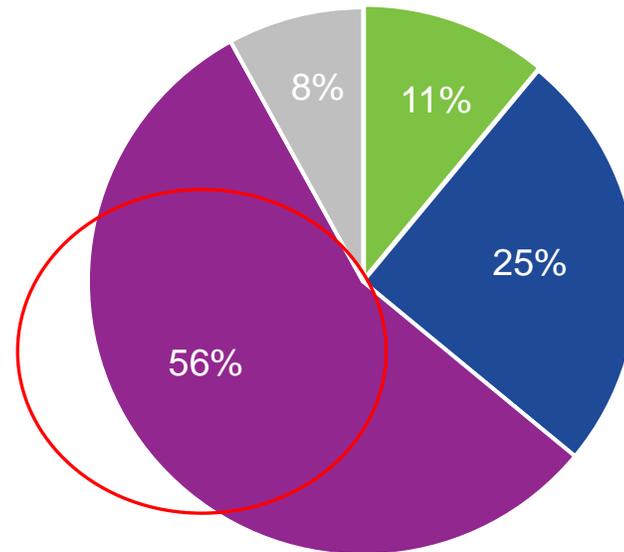


- Our company has already resumed non-essential business travel
- Our company has a fully developed plan for resuming business travel: This might include a timeline for resuming travel, updated travel policies, or new safety resources or information for travelers
- Our “return to travel planning” is underway: We are working on developing a timeline for resuming travel, updating our travel policies, or developing new safety resources or information for travelers
- Our “return to travel” planning is in the early stages: We have begun working on a timeline for resuming travel, updating our travel policies, or developing new safety resources or information for travelers – but we still have lots of work to do
- Our “return to travel” planning has not yet begun: While we might have thought about resuming business travel, we have not done any formal planning
- Other
- Not sure

Q. Which of the following best describes the current state of your company’s “return to travel” planning efforts? (n=823)

Return to Travel Planning Is Typically a Cross-Department Effort

Which best describes “return to travel” planning efforts?

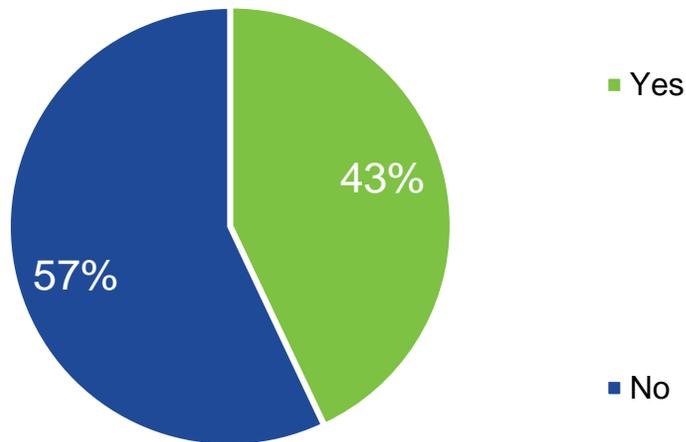


- The travel department/ team is leading our “return to travel” planning efforts
- Another department is leading our “return to travel” planning efforts (e.g., C-suite, security, HR)
- A cross-department committee/working group is leading our “return to travel” planning efforts (Note: this could include travel, HR, security, legal, and other departments)
- Other

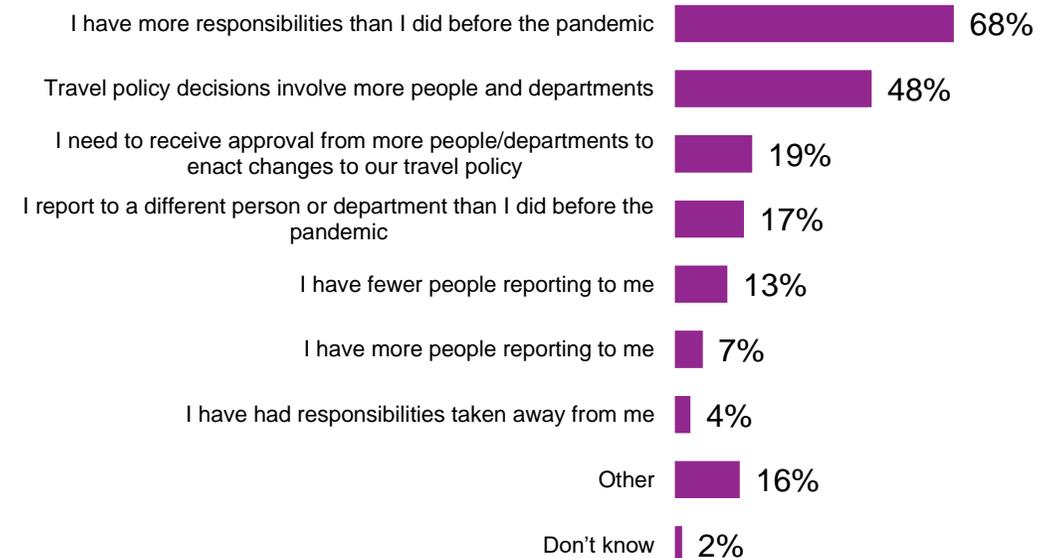
Q. Which best describes your company’s “return to travel” planning efforts? (n=600)

2 in 5 Travel Managers Say Their Job Responsibilities Have Changed as a Result of the Pandemic

Have travel manager responsibilities changed during the pandemic?



How have responsibilities changed?



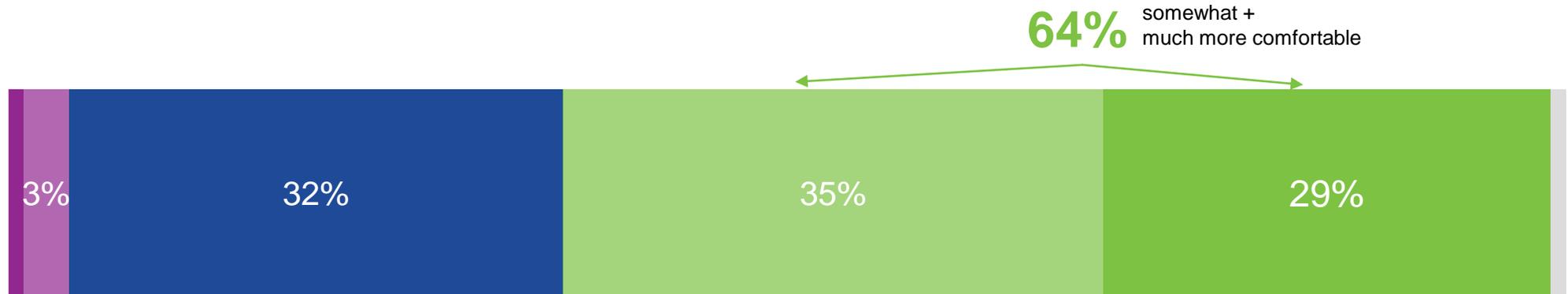
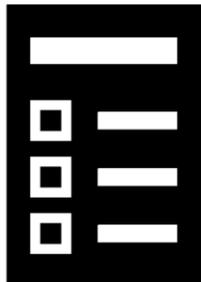
Q. Have your job responsibilities changed during the pandemic?
 Note: Results filtered for travel buyers/procurement professionals (n=446)

Q. You mentioned your job responsibilities have changed due to the pandemic. How have your job responsibilities pertaining to business travel changed? Please select all that apply.
 Note: question only displayed to those who indicated their job responsibilities have changed; results filtered for travel buyers/procurement professionals (n=191)

In the U.S., Will New CDC Guidelines Boost Confidence About Business Travel?

Has the CDC's updated guidance made respondents...?

■ Much less comfortable about traveling for business ■ Somewhat less comfortable ■ No change in opinion ■ Somewhat more comfortable ■ Much more comfortable about traveling for business ■ Not sure



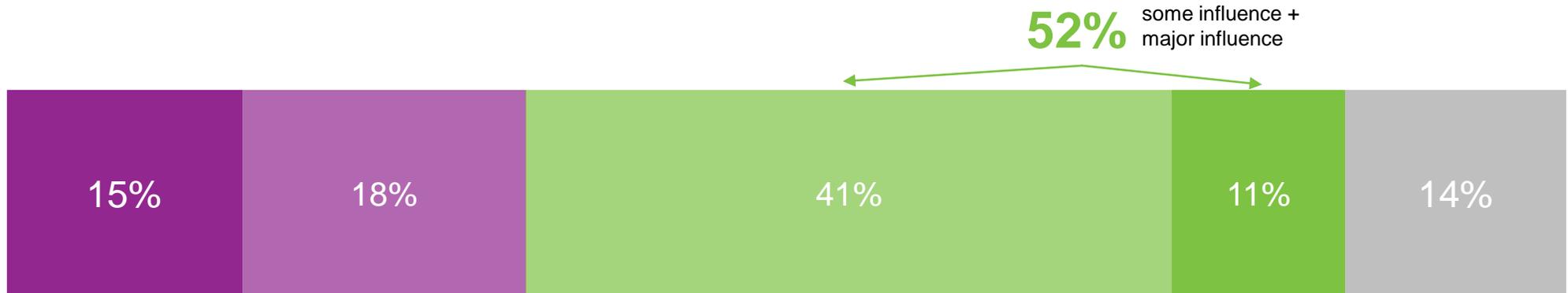
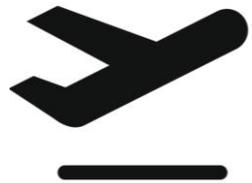
Q. In the United States, the Centers for Disease Control and Prevention (CDC) recently issued new guidance for travel. The new guidance includes a number of key changes. Most importantly, it says that domestic travel is safe for people who have been fully vaccinated. For these vaccinated travelers, the CDC no longer recommends coronavirus tests or voluntary quarantines after traveling domestically. Has the CDC's updated guidance made you personally...?

Note: Question only displayed to U.S.-based respondents (n=589)

In the U.S., Will New CDC Guidelines Expedite the Return of Business Travel

Will the CDC's new guidelines influence the timeline for resuming non-domestic business travel?

■ It will not have any influence at all ■ It will have minor influence ■ It will have some influence ■ It will have major influence ■ Not sure



Q. To what extent will the CDC's new guidance influence your company's timeline for resuming non-essential domestic business travel?

Note: Question only displayed to U.S.-based travel buyers/procurement professionals (n=332)

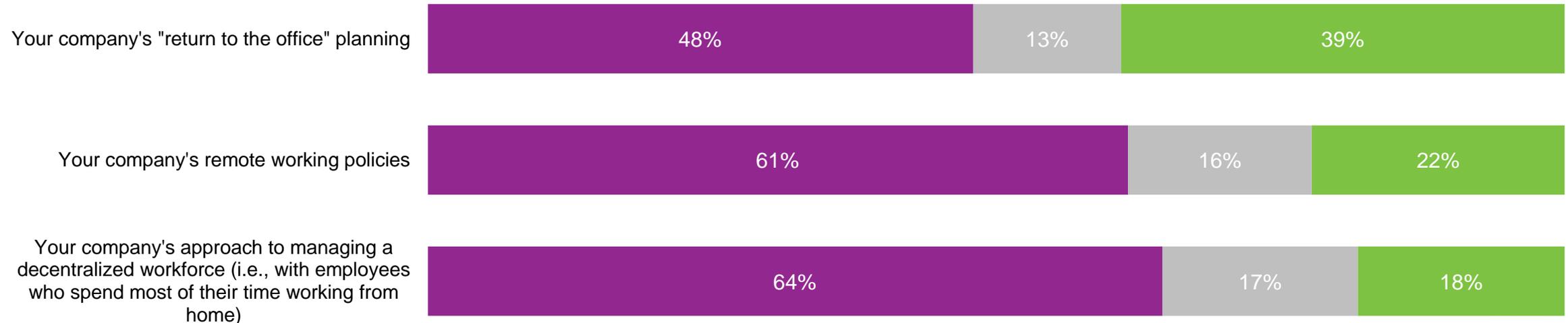
Travel Managers Have Limited Involvement With Return to Office Planning

Please rate your personal involvement with...

■ Not involved/Not involved at all

■ Neither involved nor uninvolved

■ Involved/Very involved



Q. Please rate your personal involvement with...

Note: Question only displayed to travel buyers/procurement professionals (n=446-450)

After COVID, Many Companies Will Still Have Flexible Work From Home Policies

After the pandemic, do respondents expect employees at their company will have...?

■ Much less flexibility to work from home after the pandemic than before ■ Less flexibility ■ Equal flexibility ■ More flexibility ■ Much more flexibility to work from home after the pandemic than before

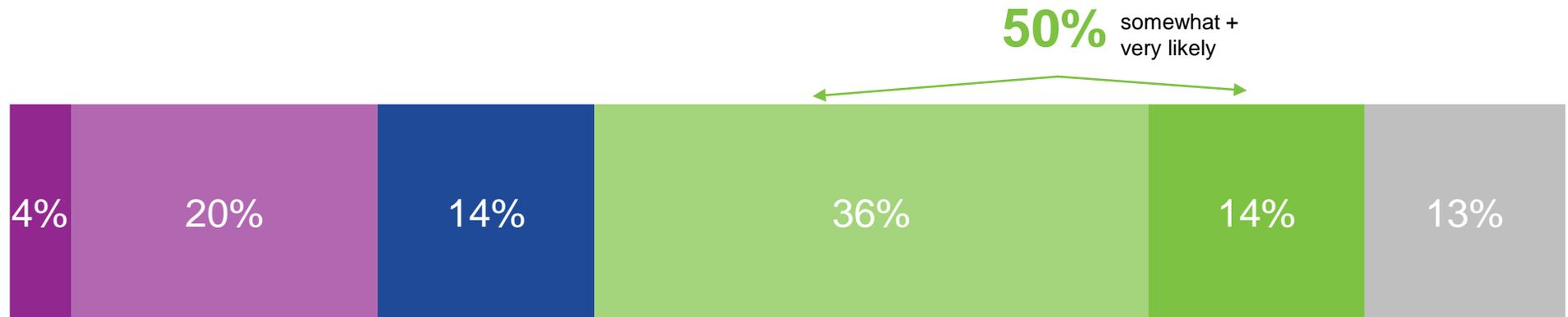


Q. The pandemic has made many companies revisit their work-from-home policies. Some companies have announced permanent changes will remain in effect even after the pandemic ends. Thinking about your company specifically, do you think...? (n=851)

Many Travel Managers Expect Their Company Will Revise T+E Policies to Account for Changing Work Norms

Are companies likely to revise T+E policies to account for increase in remote working?

■ Not likely at all ■ Not likely ■ Neither likely nor unlikely ■ Somewhat likely ■ Very likely ■ Not sure



Q. You mentioned you expect your company's employees will have more flexibility to work from home in the future. This could have implications for travel and expense policies. For instance, remote workers might need to purchase office supplies that they would otherwise use for free at the office. In some cases, remote workers might hold business meetings at restaurants or coffee shops instead of using office space. Is your company likely to revise its travel and expense policies to account for an increase in remote working?
Note: Question only displayed to respondents who expect their company's employees will have "more flexibility" or "much more flexibility" to work from home after the pandemic than they had before; results filtered for travel buyers/procurement professionals (n=396)

Many Respondents Expect T+E Budgets Will Decrease as a Result of Changing Work Norms

How will changing work norms impact T+E budgets?

■ Decrease significantly ■ Decrease slightly ■ Neither increase nor decrease ■ Increase slightly ■ Increase significantly ■ Don't know



Q. Thinking about your company, what do you think the impact of increased workplace flexibility, working from home and alternative meeting venues will have on future Travel and Expense (T&E) budgets compared to previous budgets? (n=833)

Business Travel Still Grounded



92%

of companies have canceled or suspended **most** (24%) or **all** (67%) trips to China



88%

of companies have canceled or suspended **most** (35%) or **all** (54%) trips to European countries



84%

of companies have canceled or suspended **most** (32%) or **all** (52%) trips to Canada



89%

of companies have canceled or suspended **most** (39%) or **all** (50%) international trips



91%

of companies have canceled or suspended **most** (28%) or **all** (64%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



87%

of companies have canceled or suspended **most** (29%) or **all** (57%) trips to Latin America



67%

of companies have canceled or suspended **most** (41%) or **all** (26%) trips to the United States

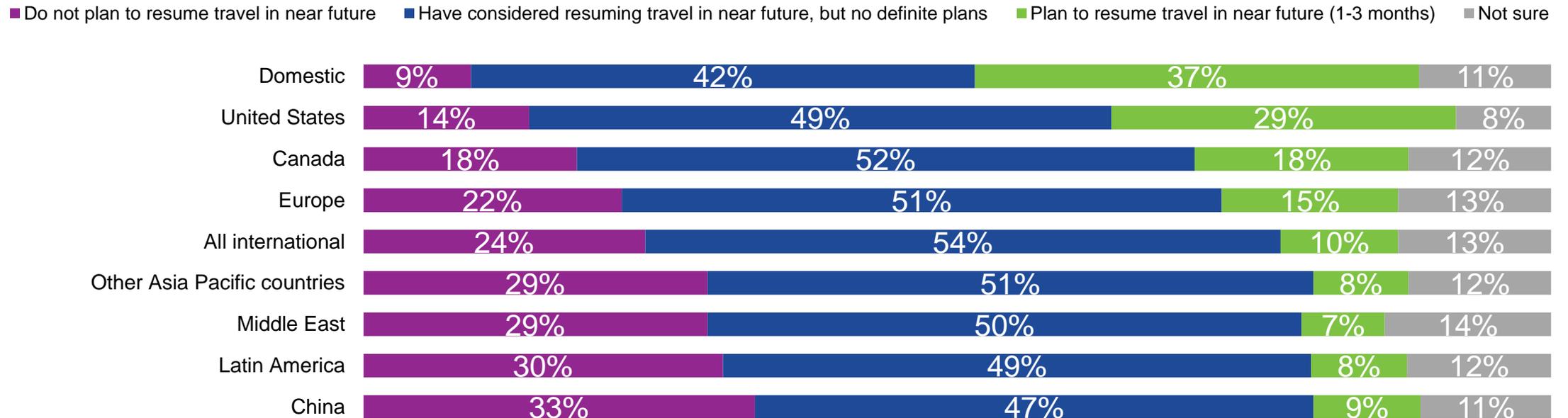


61%

of companies have canceled or suspended **most** (47%) or **all** (14%) domestic travel within their own country

More Than One-Third of Companies (37%) Plan to Resume Domestic Business Travel in the Near Future

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=314-486)