

Coronavirus Poll Results

June 17, 2021

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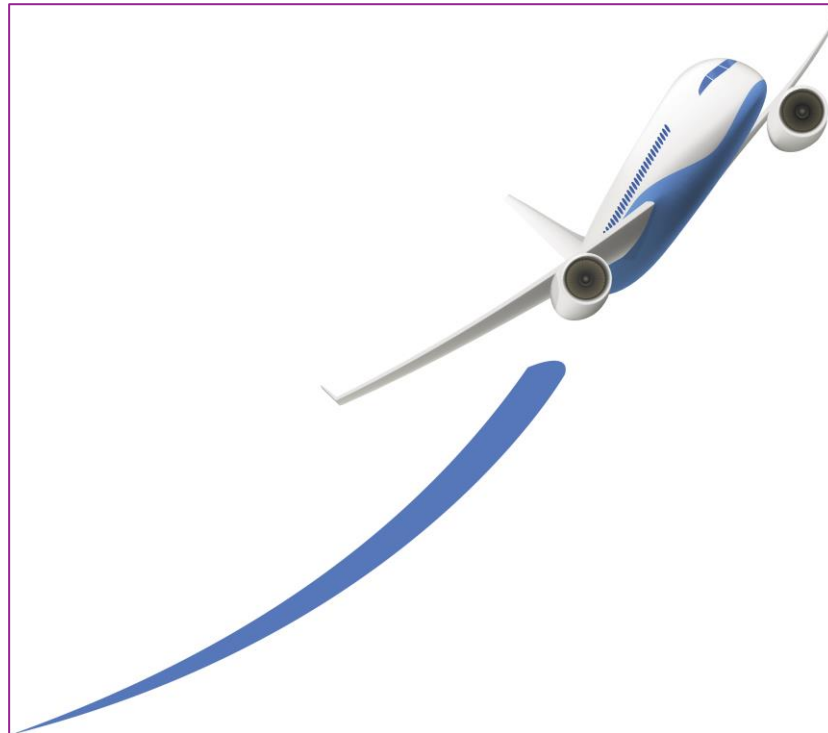


Methodology

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

- Fielding took place from June 7 through June 12, 2021
- An email invitation was sent to 16,059 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, 640 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

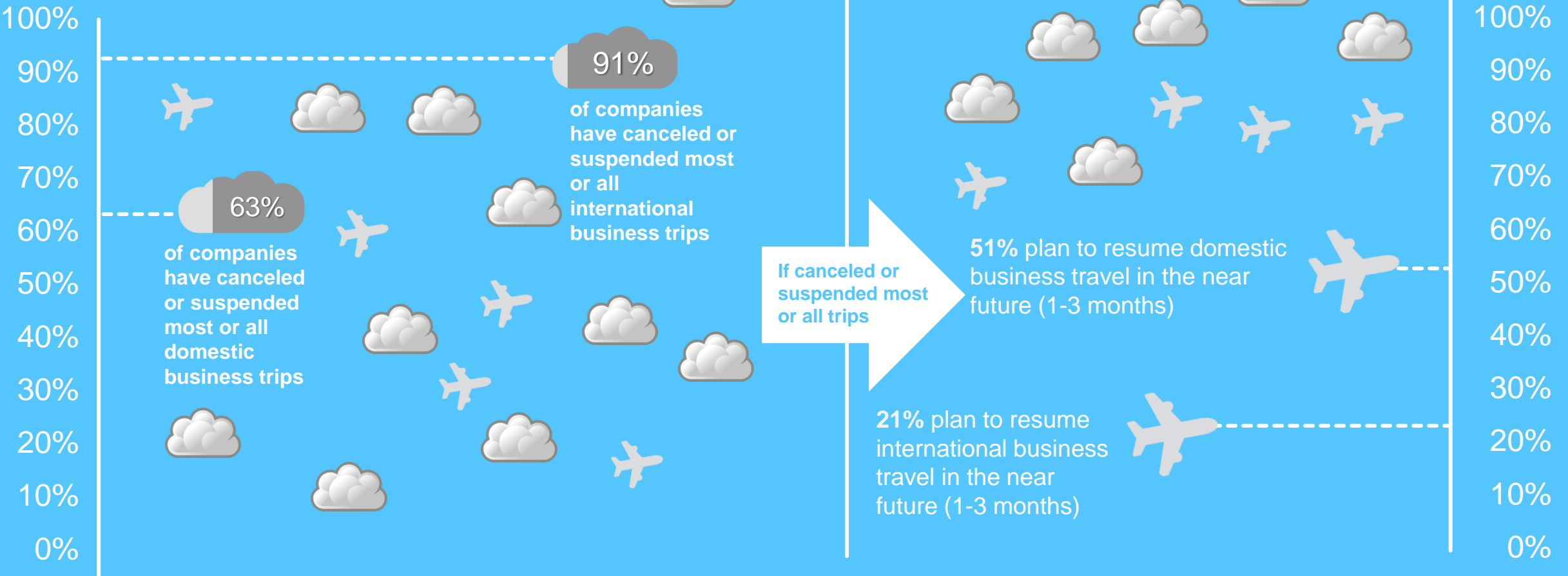
The State of Business Travel





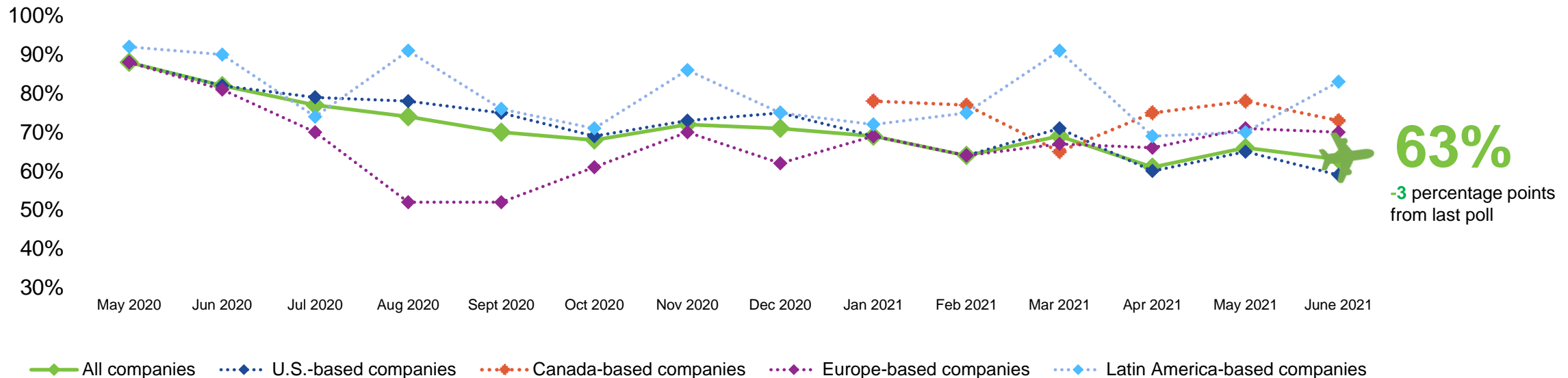
The State of Business Travel

June 2021



The State of Domestic Business Travel

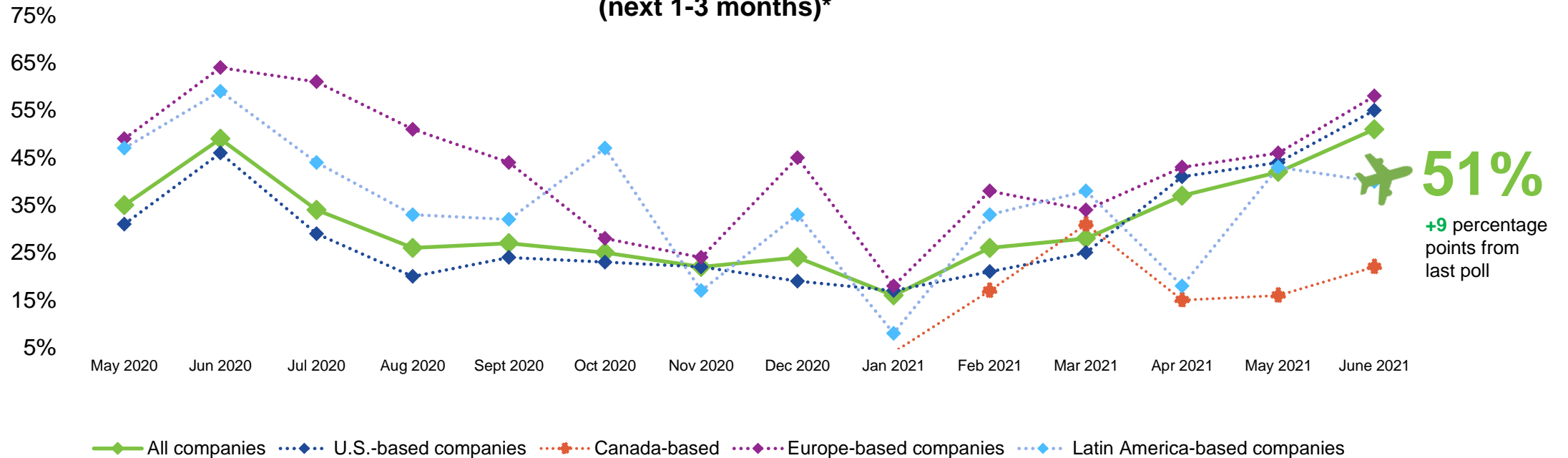
% of companies that have canceled or suspended most or all domestic business travel within their country



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

The State of Domestic Business Travel (Cont.)

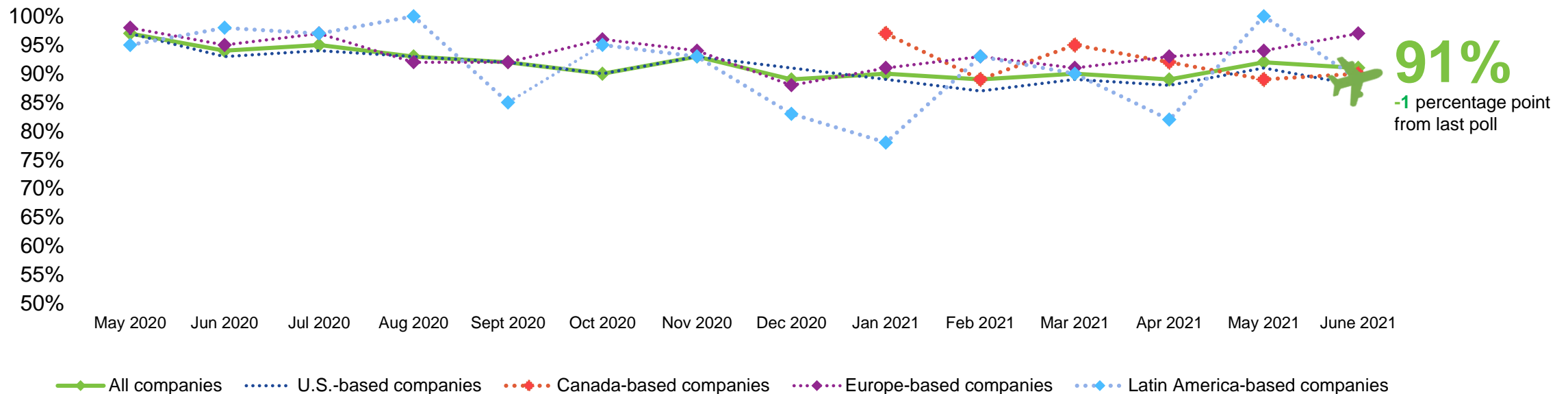
% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*



*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

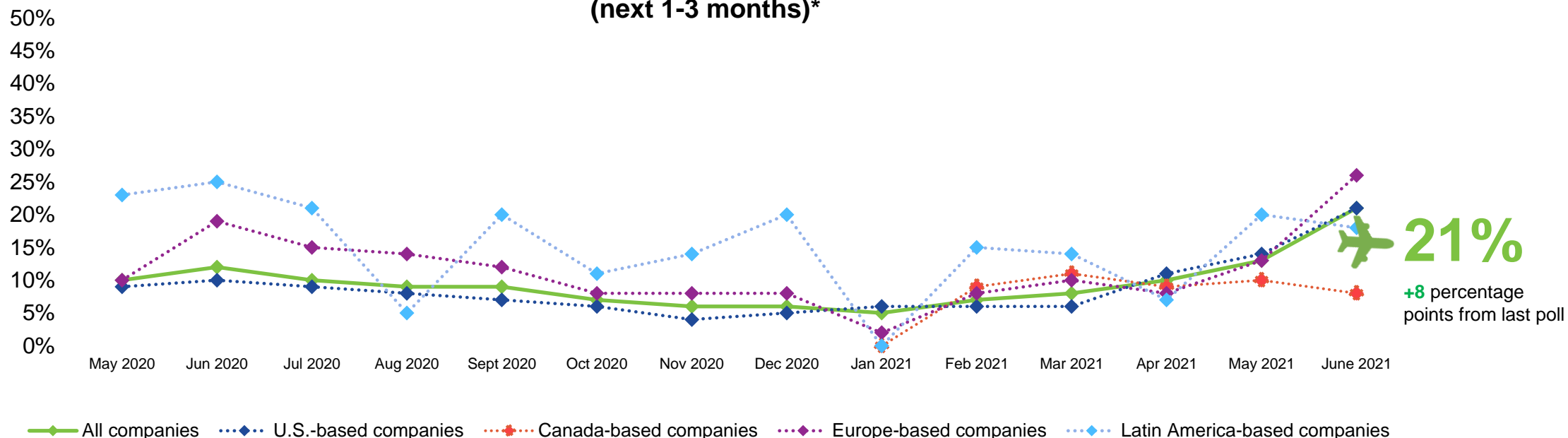
% of companies that have canceled or suspended most or all international business travel



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)*

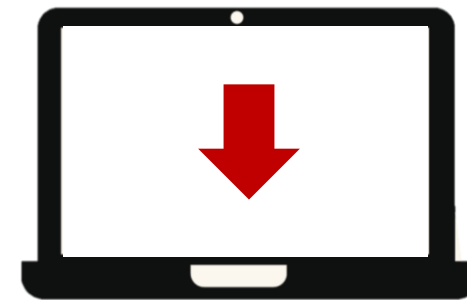
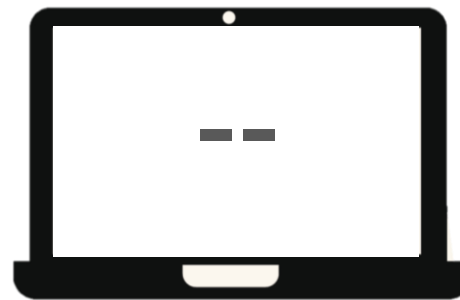


*figures are among those that indicated their company has canceled or suspended most or all international business trips

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

A Majority of Suppliers See Future Bookings Increase

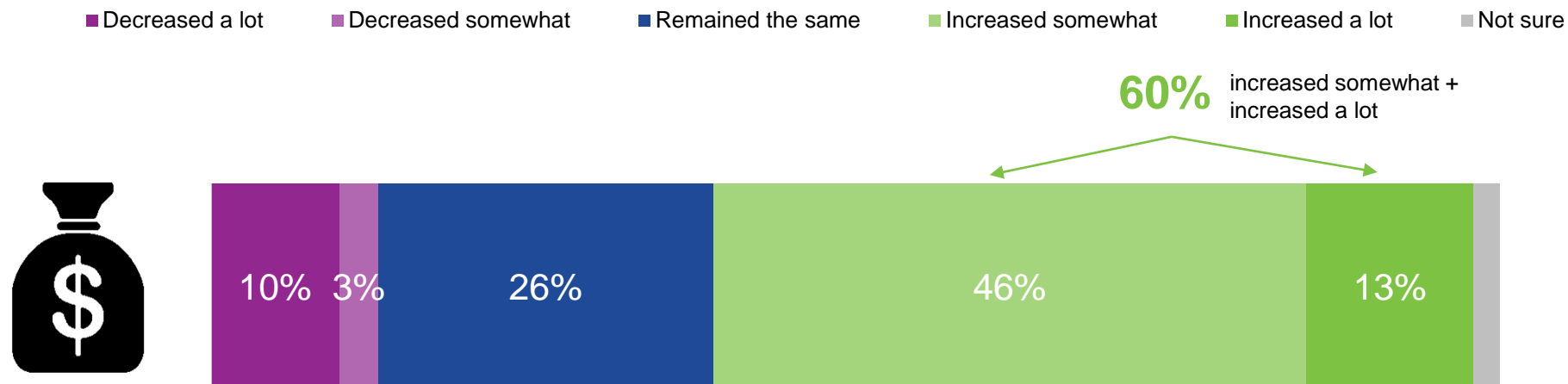
How have bookings from corporate customers changed in the past week?



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

A Large Majority of Buyers Say Their Company's Travel Spend Increased in May

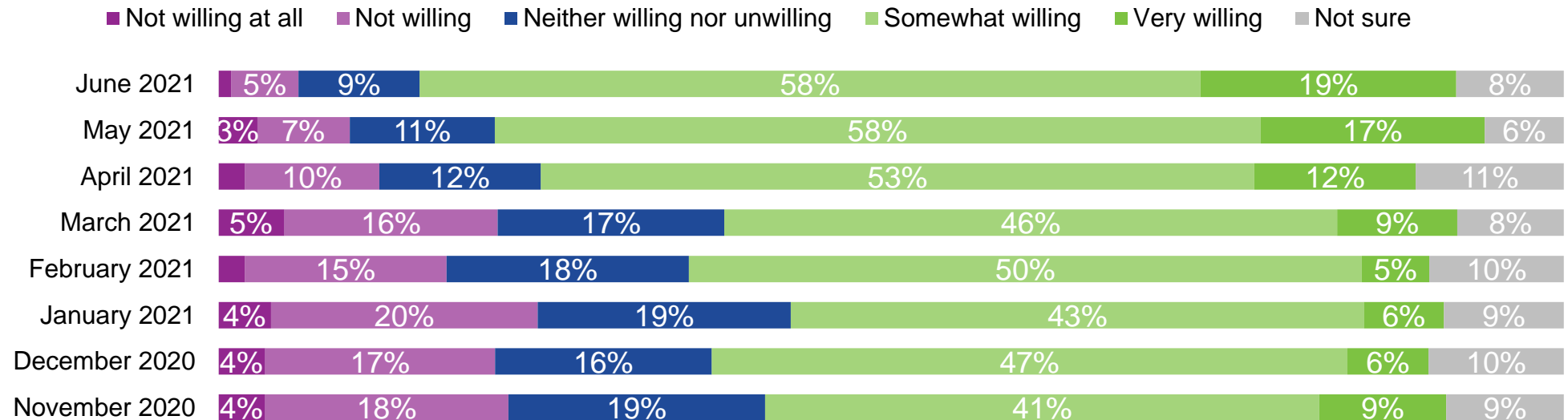
How did company travel spend change in May?



Q. How did your company's travel spend change in May, 2021, compared to the prior month?
Note: Question only displayed to travel buyers/procurement professionals (n=336)

Are Employees Willing to Travel for Work?

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

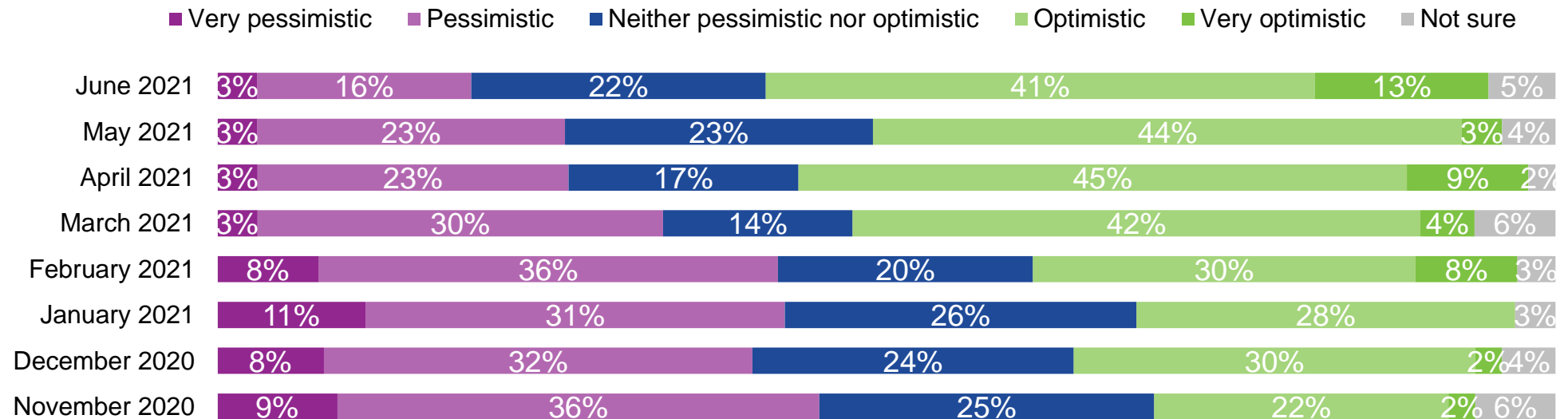


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=290-448)

Growing Optimism Among Travel Suppliers

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



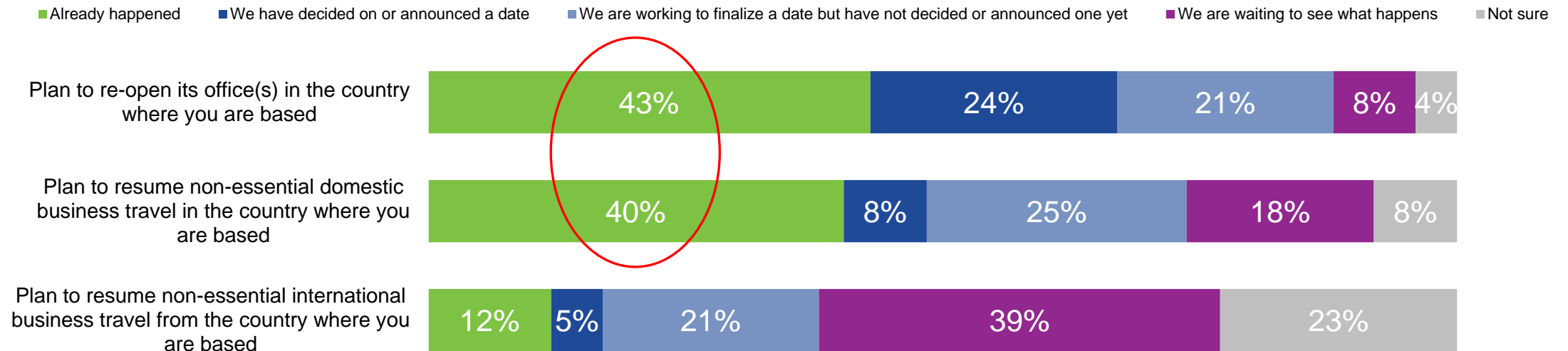
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=188-332)**

Key Highlights



Will the Return of Non-Essential Domestic Business Travel Coincide With the Return to the Office?

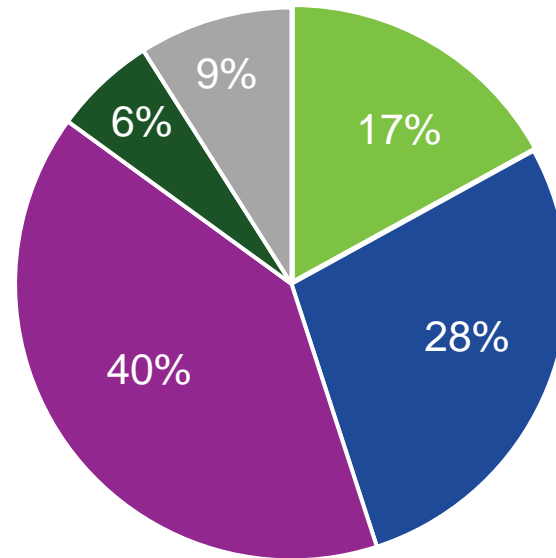
Which of the following best describes your company's...?



Q. Which of the following best describes your company's...? -(n=576-586)

Different Companies Plan Return to Travel in Different Ways

Which best describes company's return to travel planning?

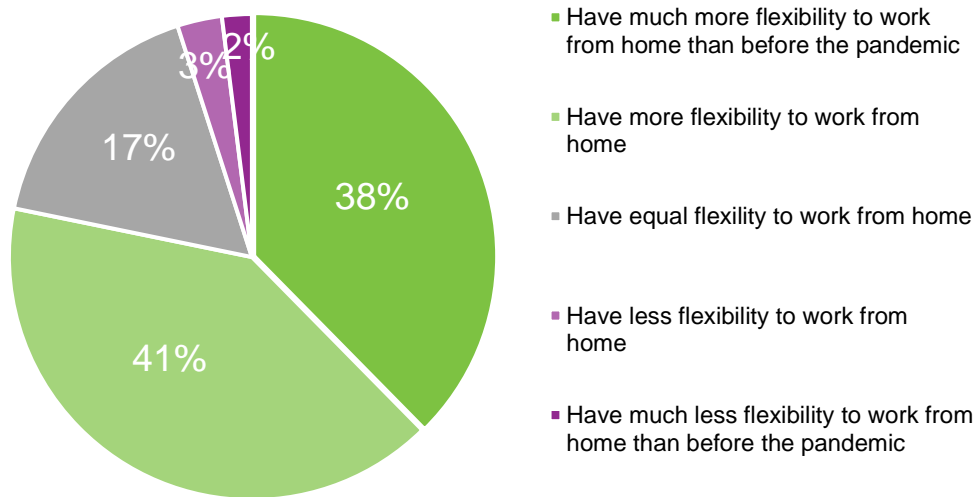


- A single department is leading our return to travel planning efforts (e.g., travel, procurement, HR, or security/risk)
- Different departments are leading different elements of our return to travel planning efforts
- A cross-department committee or task force is leading our return to travel planning efforts
- Other
- Not sure

Q. Which of the following best describes your company's return to travel planning? (n=575)

New Work Culture Brings More Flexibility – But Will It Impact Travel?

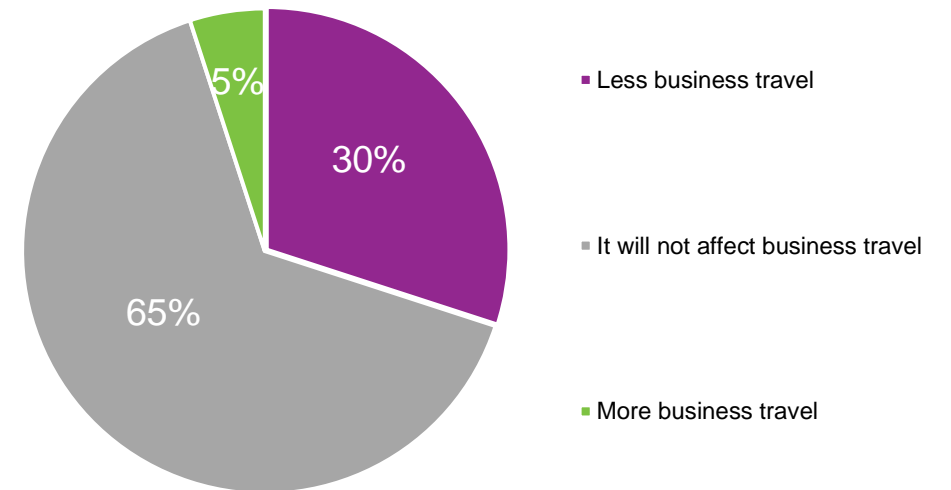
After the pandemic, do respondent think employees at their company will...?



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=568)



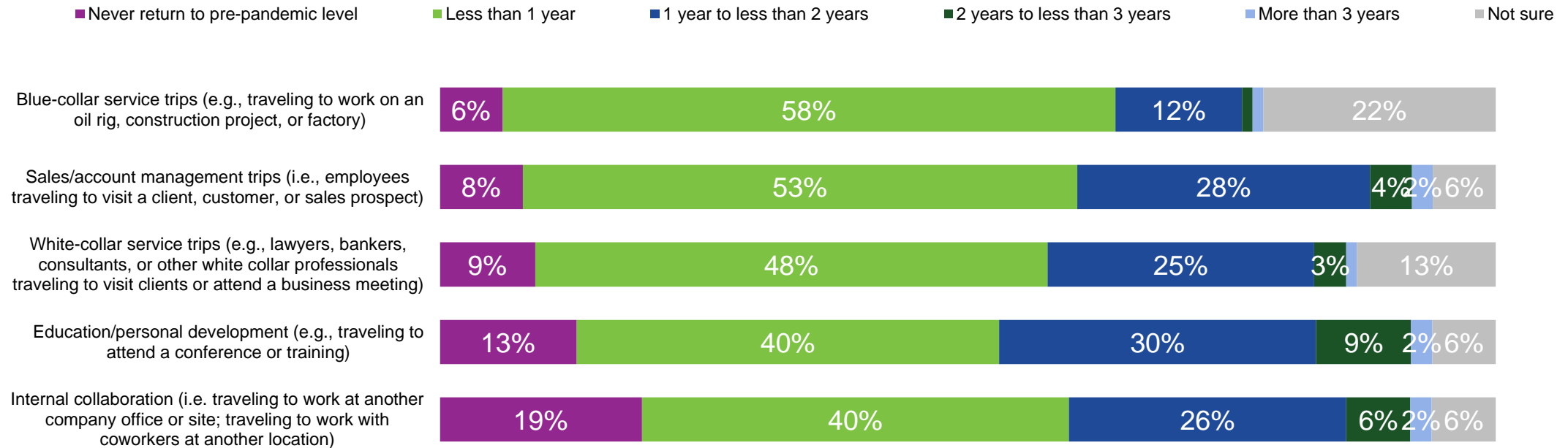
Will this lead to...?



Q. You mentioned you expect employees at your organization will have more flexibility to work from home after the pandemic. Do you think this will lead to...?
 Note: Question only displayed to respondents who expect employees at their company will have more flexibility or much more flexibility to work from home following the pandemic than they had prior to the pandemic (n=568)

More Than Half of Respondents Expect Sales/Account Management Trips to Fully Recover Within a Year

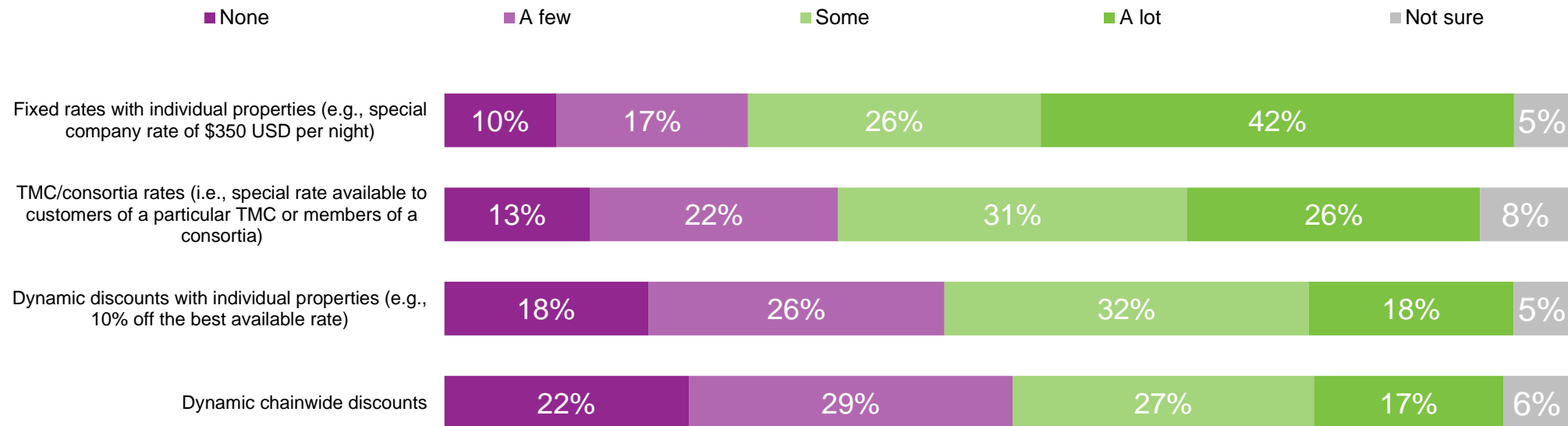
How long will it take for the following types of business trips to return to the pre-pandemic level?



Q. How long do you think it will take for the following types of business trips to return to their pre-pandemic level? (n=574-578)

Most Travel Programs Had Fixed Property and Dynamic Hotel Discounts in 2020

How many of the following types of hotel discounts did travel programs have in place last year?



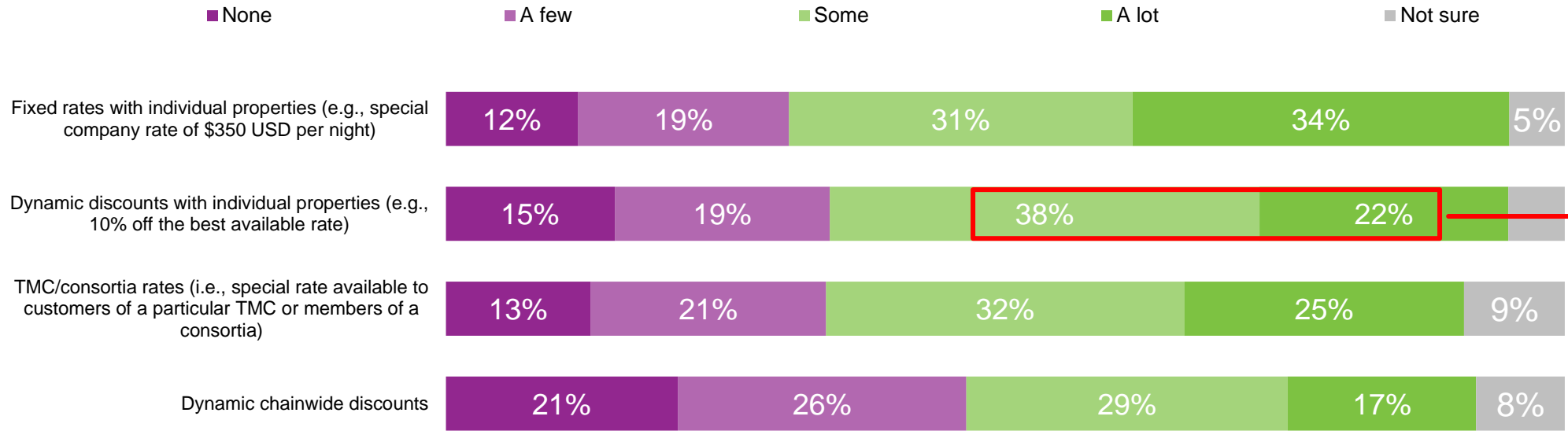
Q. How many of the following types of hotel discounts did your travel program have in place last year (2020)?

Note: This question asks about the discounts that were available last year. In most cases, your company would have negotiated these discounts in 2019.

Note: Question only displayed to travel buyers/procurement professionals (n=322-326)

Dynamic Discounts Increase This Year – But Still Less Prevalent Than Fixed Rates

How many of the following types of hotel discounts do travel programs have in place this year?



60% say they have “some” or “a lot” of dynamic discounts with individual properties in place this year (up 10 percentage points from last year)

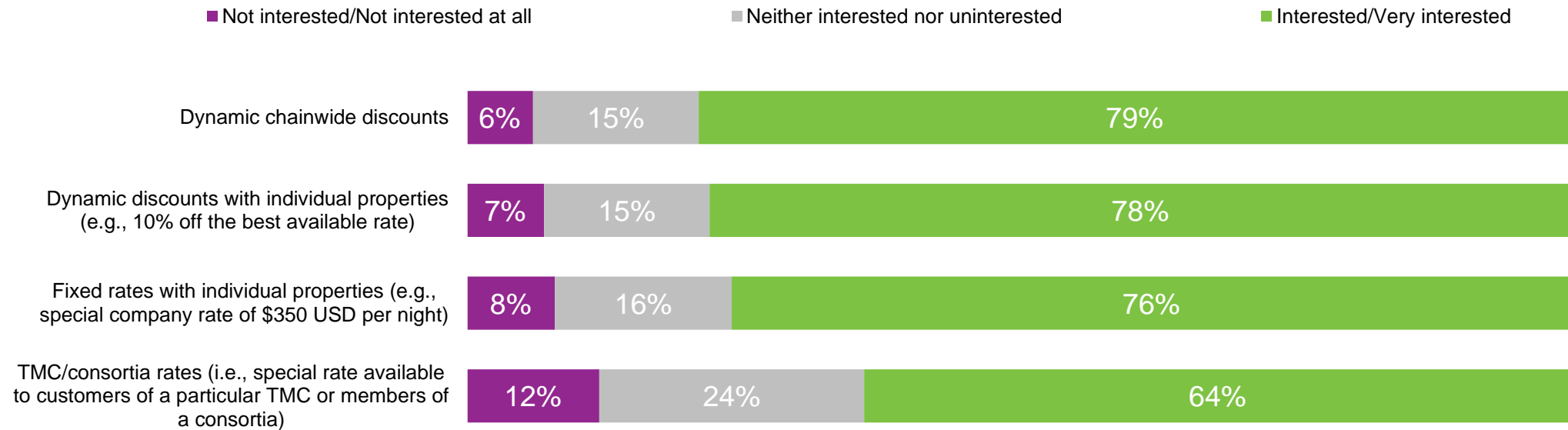
Q. How many of the following types of hotel discounts does your travel program have in place this year (2021)?

Note: This question asks about the discounts that are available this year. In most cases, your company would have negotiated these discounts last year.

Note: Question only displayed to travel buyers/procurement professionals (n=320-326)

Buyers Want Dynamic Discounts *and* Fixed Rates Next Year

Are travel buyers interested in having various hotel discounts next year?



Q. Please rate your interest in offering the following types of hotel discounts for your travelers next year (2022).

Note: Question only displayed to travel buyers/procurement professionals (n=317-322)

2 in 5 Companies Plan to Resume Domestic Business Travel in the Near Future

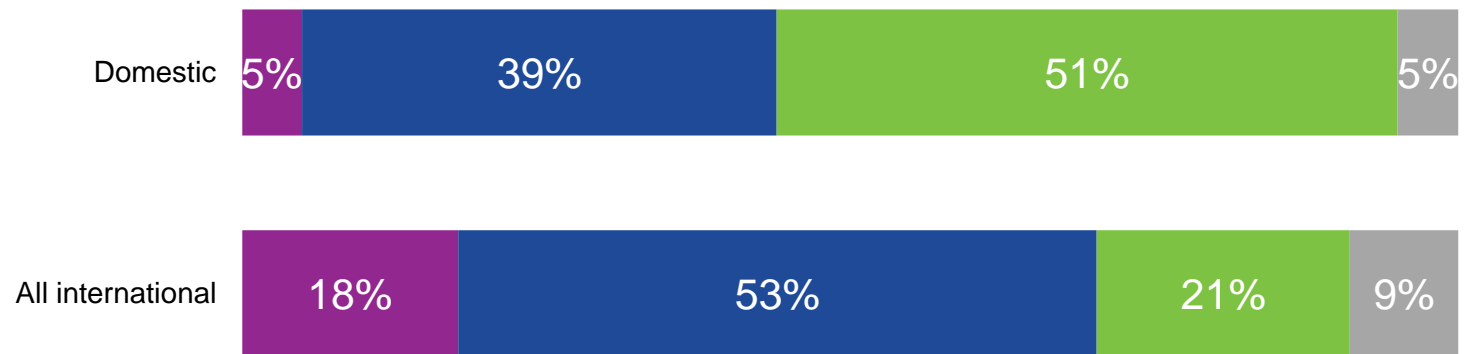
 **91%**
of companies have canceled or suspended **most** (39%) or **all** (52%) international trips

 **63%**
of companies have canceled or suspended **most** (43%) or **all** (21%) 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. 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=319-420)

Q. Thinking about your company, how has the coronavirus impacted business travel to... ? (n=473-517)