

Coronavirus Poll Results

May 20, 2020

Connecting the people that connect the world.™



Methodology

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

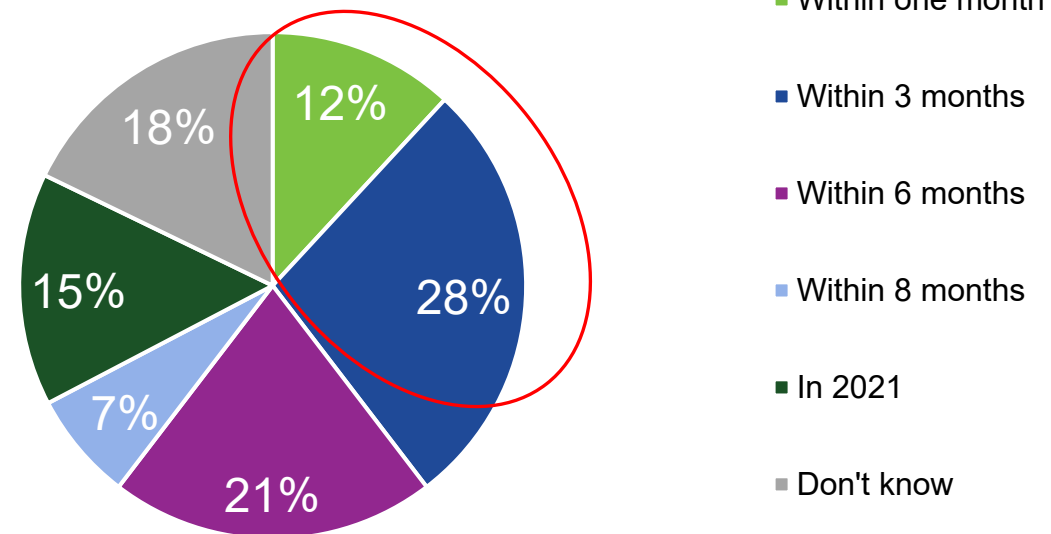
- Fielding took place from May 13 through May 16, 2020
- An email invitation was sent to 16,318 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 1,705 companies responded to the poll

Key Highlights



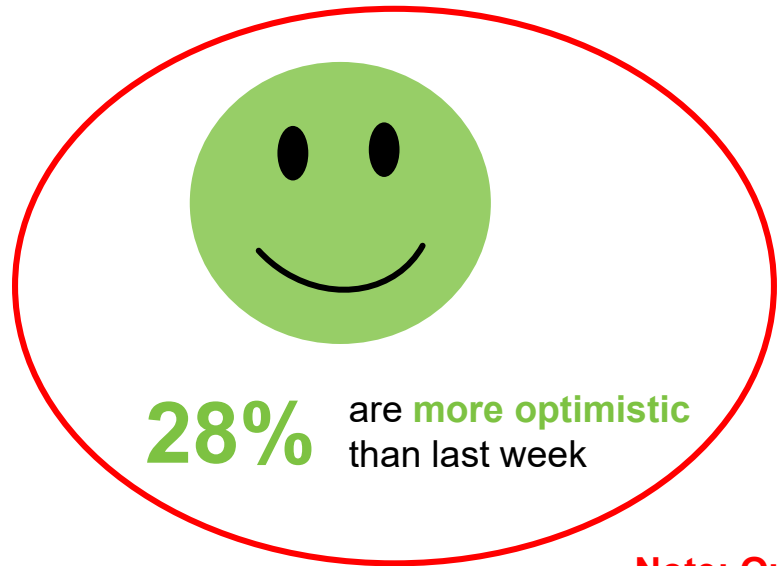
2 in 5 Companies Are Planning for a Recovery in the Next 3 Months...

What is the timeframe you are planning for your post-coronavirus recovery plan?



Some Suppliers Becoming More Optimistic

How do suppliers feel about the corporate travel industry's path to recovery?



Note: Question only displayed to travel suppliers/TMCs

Business Travel Still Grounded...



99%

of companies have canceled or suspended **most** (13%) or **all** (86%) trips to China



97%

of companies have canceled or suspended **most** (22%) or **all** (75%) trips to European countries



94%

of companies have canceled or suspended **most** (26%) or **all** (68%) trips to Canada



97%

of companies have canceled or suspended **most** (22%) or **all** (75%) international trips



97%

of companies have canceled or suspended **most** (17%) or **all** (80%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



96%

of companies have canceled or suspended **most** (18%) or **all** (78%) trips to Latin America



90%

of companies have canceled or suspended **most** (36%) or **all** (54%) trips to the United States

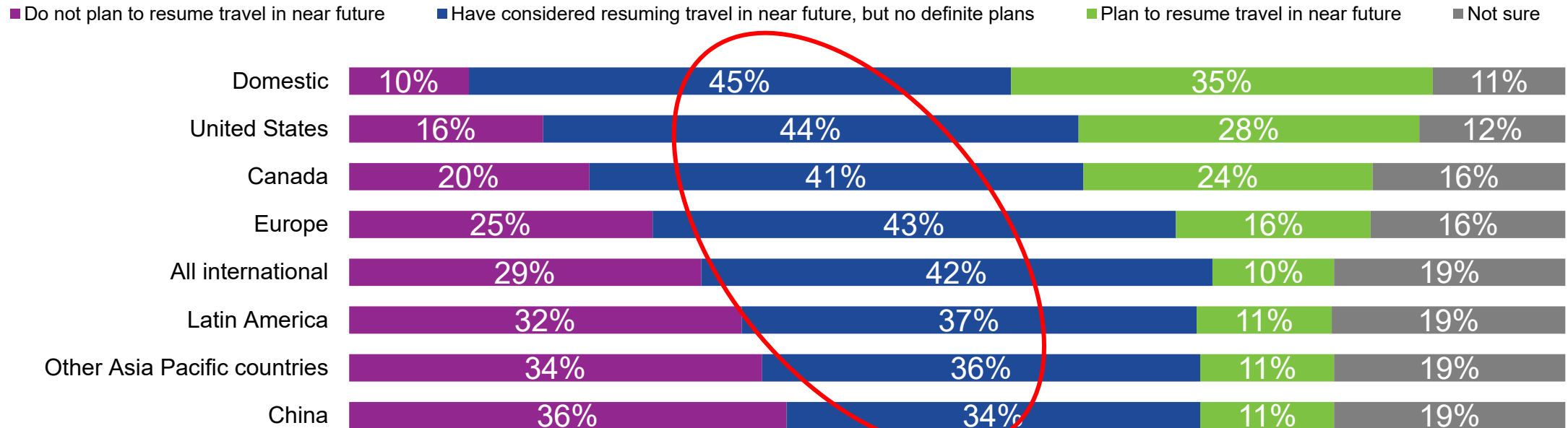


88%

of companies have canceled or suspended **most** (42%) or **all** (47%) domestic travel within their own country

...But Companies Consider Resuming Travel

Are Companies Planning to Resume Travel to...?

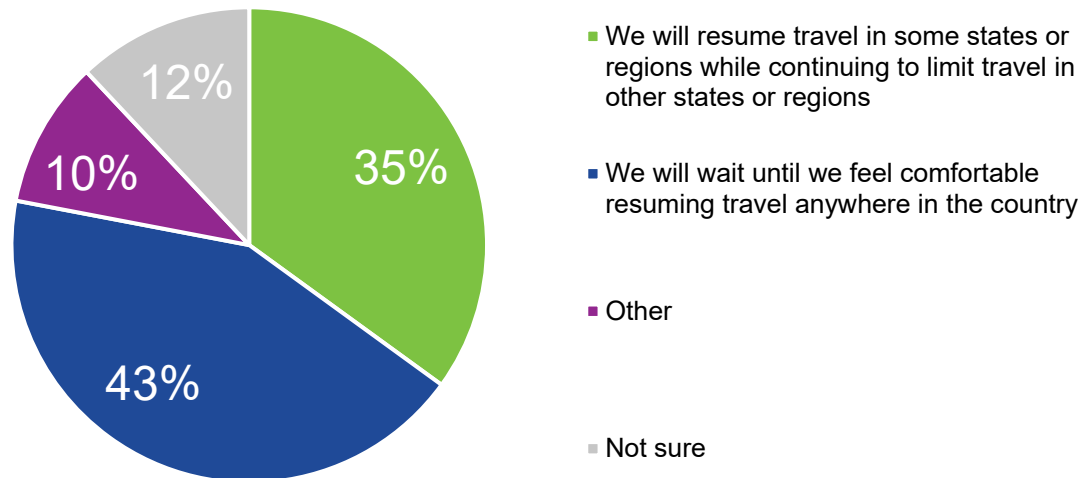


Q. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

Note: Respondents only asked about countries/regions where they indicated their company has canceled or suspended most or all business travel (n=622-914)

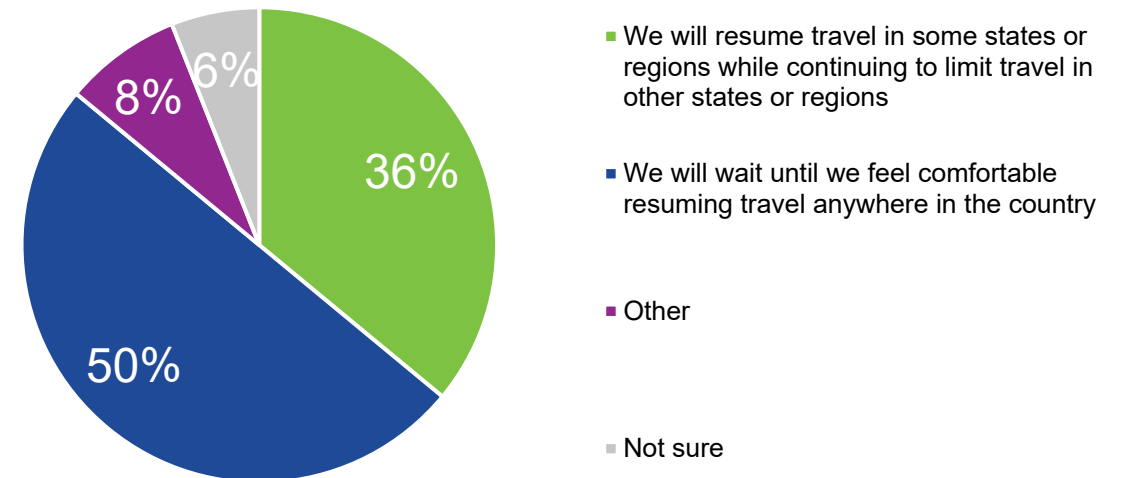
When Resuming Domestic Travel, Different Companies Will Have a Different Approach

How will companies resume domestic travel?
-U.S.-based travel managers/procurement professionals



Q. You mentioned your company has limited most or all domestic travel within the U.S. When your company decides to resume travel, which will most likely be your approach?
Note: Only displayed to U.S.-based travel buyers or procurement professionals who indicated their company has suspended most or all domestic business trips (n=420)

How will companies resume domestic travel?
-Non-U.S.-based travel managers/procurement professionals

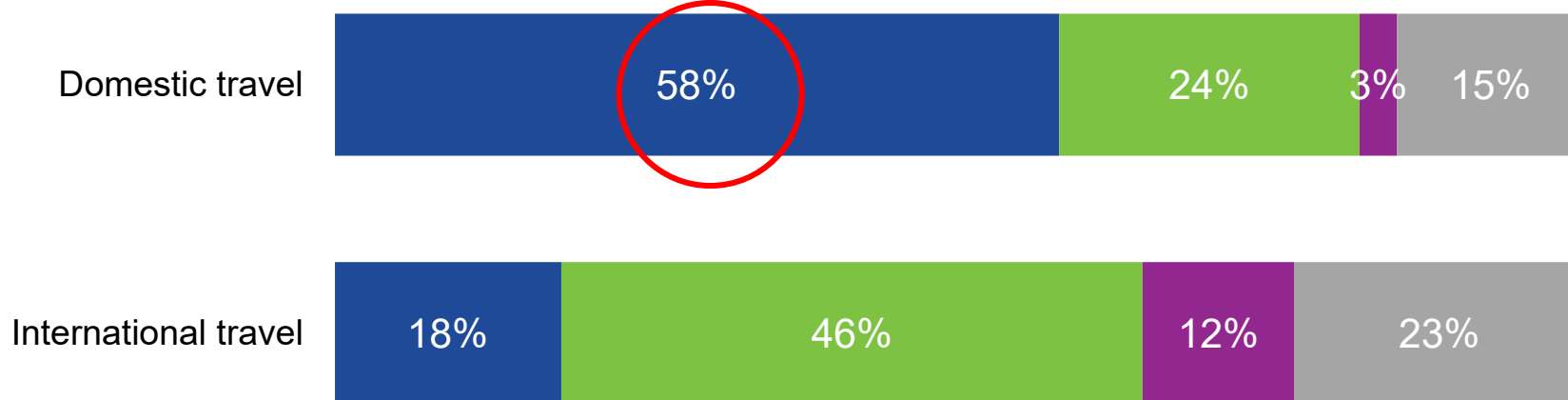


Q. You mentioned your company has limited most or all domestic travel within your country. When your company decides to resume travel, which will most likely be your approach?
Note: Only displayed to non-U.S.-based travel buyers or procurement professionals who indicated their company has suspended most or all domestic business trips (n=147)

What's the Timeline?

Will travel resume within...?

■ 2-3 months ■ 6-8 months ■ 12 months or longer ■ Unsure



Most companies expect to resume **domestic travel** within 2-3 months. However, **international travel** may take longer

Q. You said your company has canceled or suspended business travel due to the Coronavirus. Do you expect travel to resume within the next...?

Note: Question only displayed to respondents who said their company has cancelled at least "a few" domestic or international trips as a result of the coronavirus (n=1,118-1,052)

What Will Influence Decision to Resume Travel?

Thinking about what it would take for you to feel comfortable with your company's employees traveling on business, how important are each of the following?

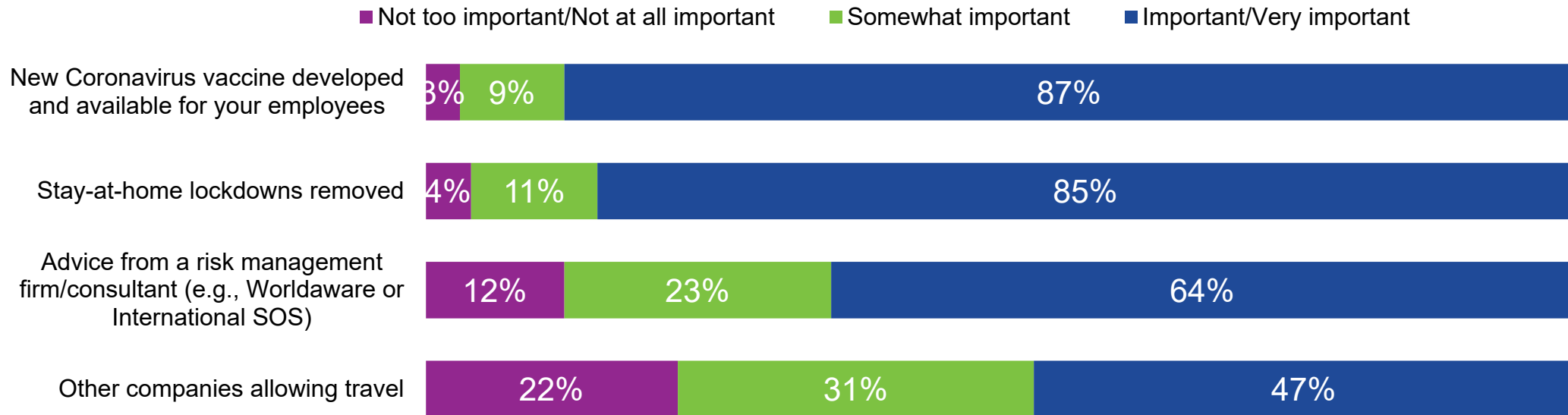
■ Not too important/Not at all important ■ Somewhat important ■ Important/Very important



Q. Thinking about what it would take for you to feel comfortable with your company's employees traveling on business, how important are each of the following? (n=1,146-1,204)

What Will Influence Decision to Resume Travel? (Cont.)

Thinking about what it would take for you to feel comfortable with your company's employees traveling on business, how important are each of the following? (cont.)



Q. Thinking about what it would take for you to feel comfortable with your company's employees traveling on business, how important are each of the following? (n=1,146-1,204)

What Would Make Respondents More Comfortable With...?

What would make respondents more comfortable with...? top 3 measures



Air travel by employees at their company

76%

Increase airplane cleaning standards to ensure every traveler touchpoint is sanitized before each flight

60%

Require all passengers wear masks

59%

Keep middle seats empty



Hotel stays by employees at their company

80%

Increase cleaning standards to exceed current cleaning protocols

55%

Require employees to wear face masks

53%

Provide additional staff training about COVID-19 sanitary practices and incident reporting



Ground transportation by employees at their company

70%

Increase cleaning standards to exceed current cleaning standards

68%

Provide hand sanitizer and disinfectant wipes for customers

58%

Require drivers to wear face masks and gloves

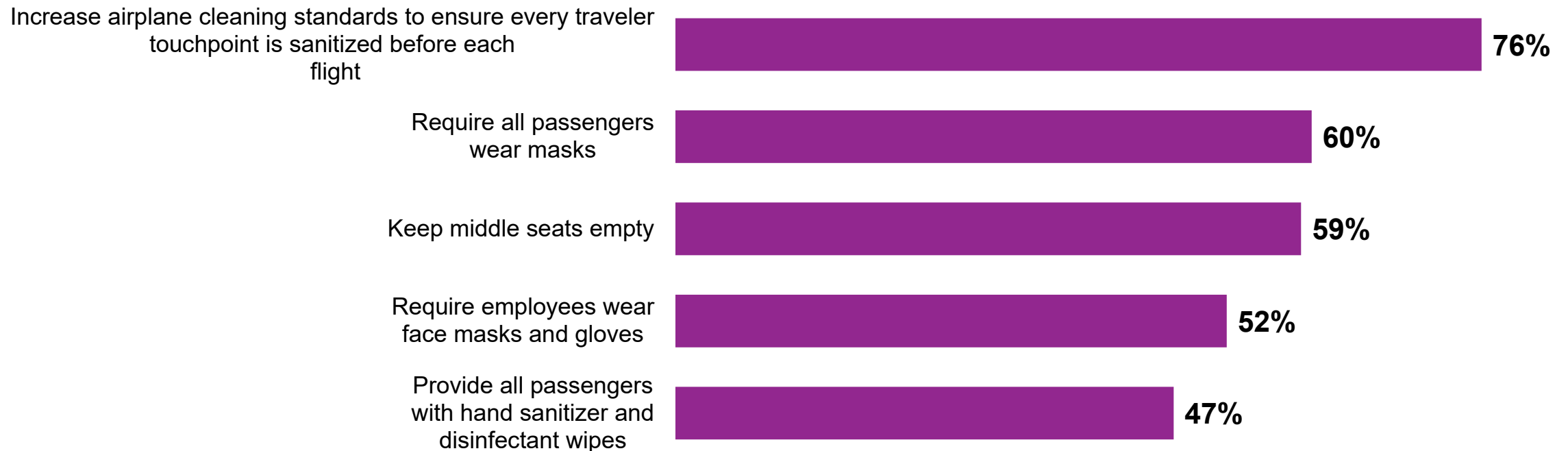
Note: For each category, respondents were shown a variety of different measures and asked to pick up to five; only the three most commonly selected are shown here for each category. The full results are posted on the GBTA website

What Will Make Companies More Comfortable With Air Travel?



What can airlines do to help alleviate any concerns your or your travelers may have about flying during the COVID-19 pandemic?

% included in top 5



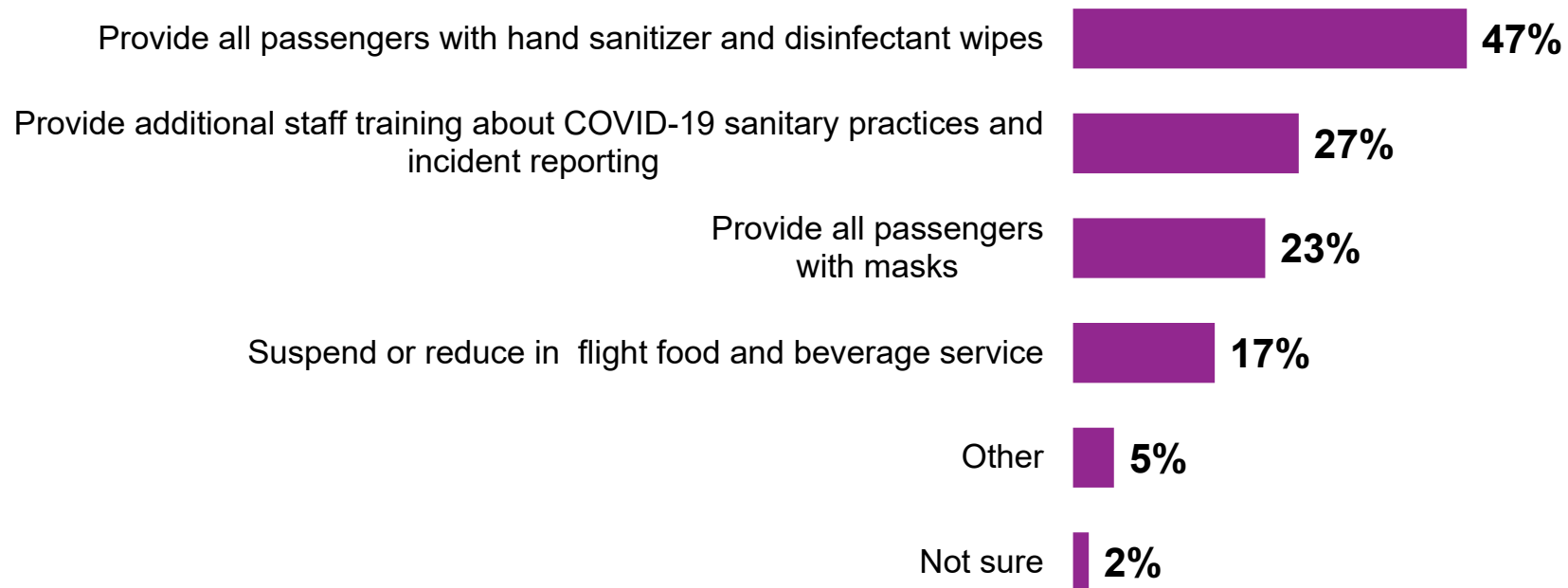
Q. What can airlines do to help alleviate any concerns your or your travelers may have about flying during the COVID-19 pandemic? Please select up to three. (n=1,263)

What Will Make Companies More Comfortable With Air Travel? (Cont.)



What can airlines do to help alleviate any concerns your or your travelers may have about flying during the COVID-19 pandemic?

% included in top 5 (cont.)



Q. What can airlines do to help alleviate any concerns your or your travelers may have about flying during the COVID-19 pandemic? Please select up to three. (n=1,263)

What Will Make Companies More Comfortable With Hotel Stays?



When thinking about travelers at your company staying in hotels, what are the most important actions a hotel can do to help alleviate concerns about health and safety?

% included in top 5



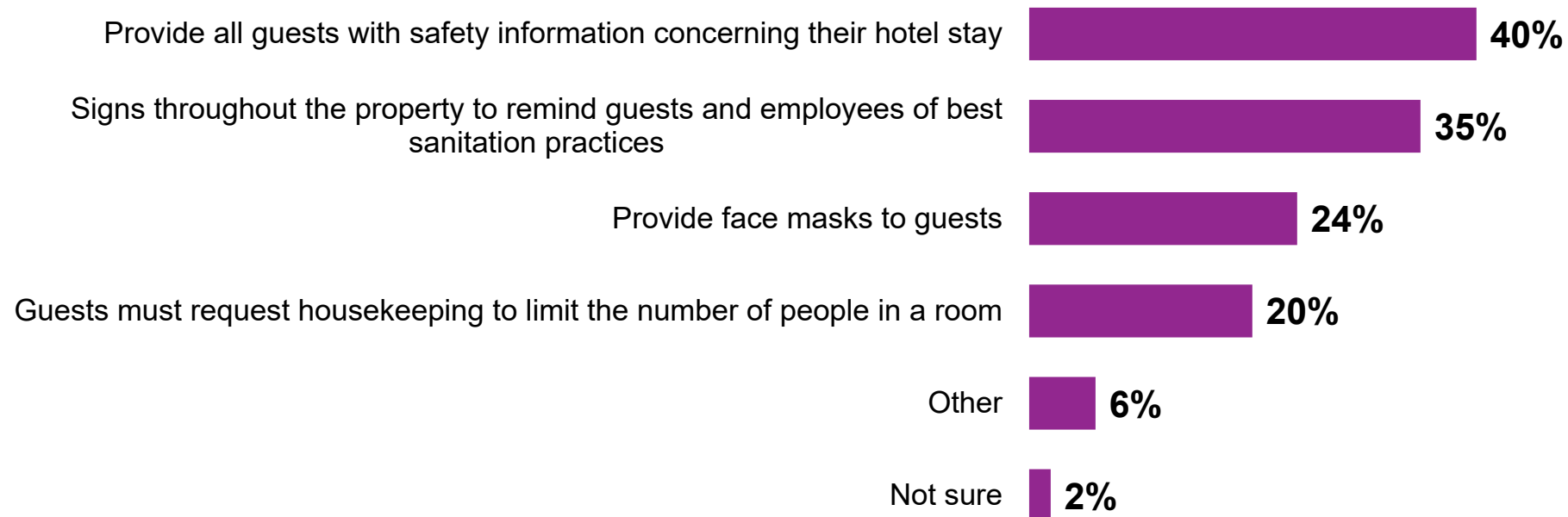
Q. When thinking about travelers at your company staying in hotels, what are the most important actions a hotel can do to help alleviate concerns about health and safety? Please select up to five. (n=1,279)

What Will Make Companies More Comfortable With Hotel Stays? (Cont.)



When thinking about travelers at your company staying in hotels, what are the most important actions a hotel can do to help alleviate concerns about health and safety?

% included in top 5 (cont.)



Q. When thinking about travelers at your company staying in hotels, what are the most important actions a hotel can do to help alleviate concerns about health and safety? Please select up to five. (n=1,279)

What Will Make Companies More Comfortable With Ground Transportation?



Thinking about ground transportation (such as rental cars, taxis, chauffeured transportation and ride sharing), what are the most important measures these providers can take to make you feel comfortable about your traveler's safety and well-being?

% included in top 5



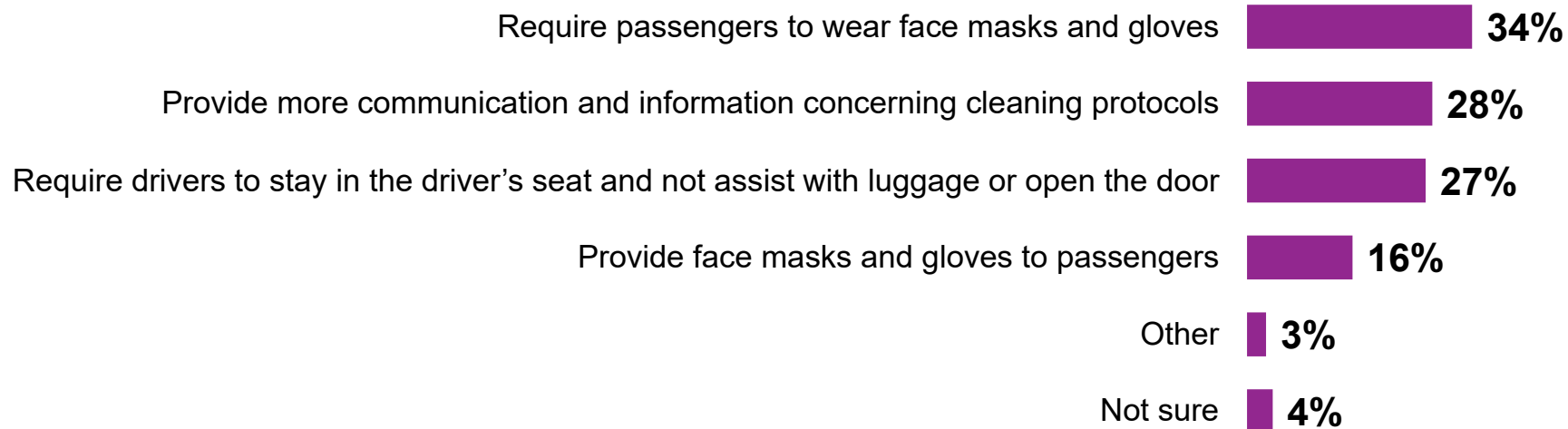
Q. Thinking about ground transportation such as rental cars, taxis, chauffeured transportation and ride sharing), what are the most important measures these providers can take to make you feel comfortable about your traveler's safety and well-being? Please select up to five. (n=1,257)

What Will Make Companies More Comfortable With Ground Transportation? (Cont.)



Thinking about ground transportation (such as rental cars, taxis, chauffeured transportation and ride sharing), what are the most important measures these providers can take to make you feel comfortable about your traveler's safety and well-being?

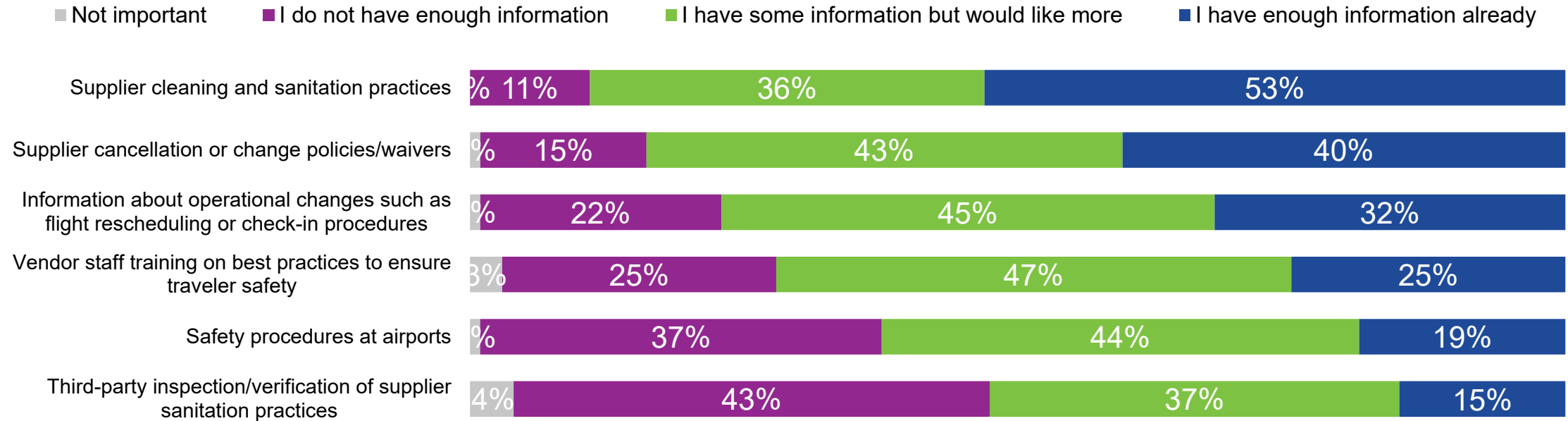
% included in top 5 (cont.)



Q. Thinking about ground transportation such as rental cars, taxis, chauffeured transportation and ride sharing), what are the most important measures these providers can take to make you feel comfortable about your traveler's safety and well-being? Please select up to five. (n=1,257)

Buyers Receive Information From Suppliers – But Sometimes Not Enough

Do buyers have enough information about the following supplier efforts?



Q. Do you feel you have enough information about supplier efforts in the following areas?

Note: Results filtered for travel managers/procurement professionals (n=667-673)