

Coronavirus Poll Results

May 20, 2021

Connecting the people that connect the world.™

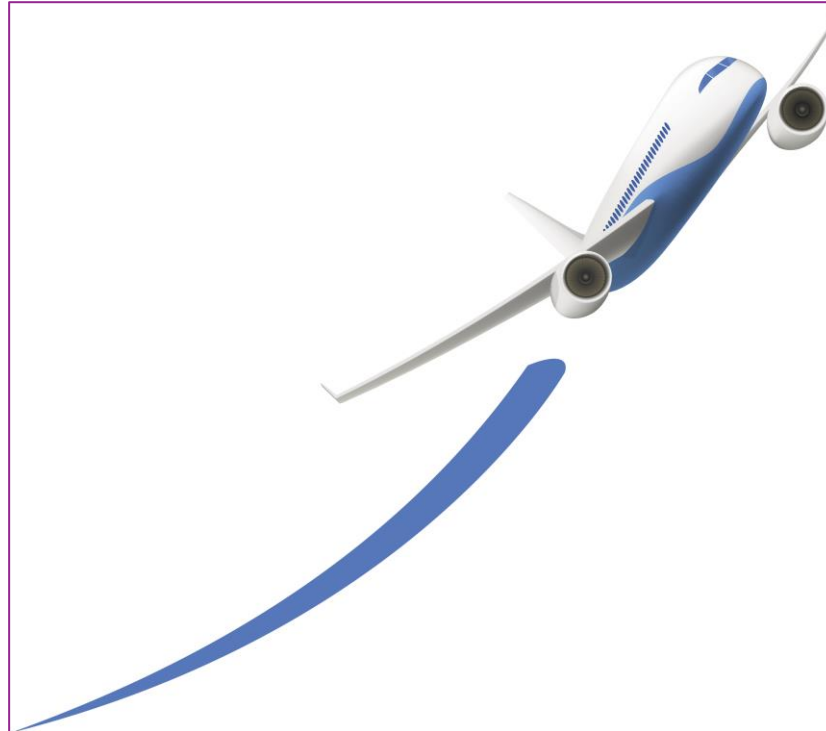


Methodology

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

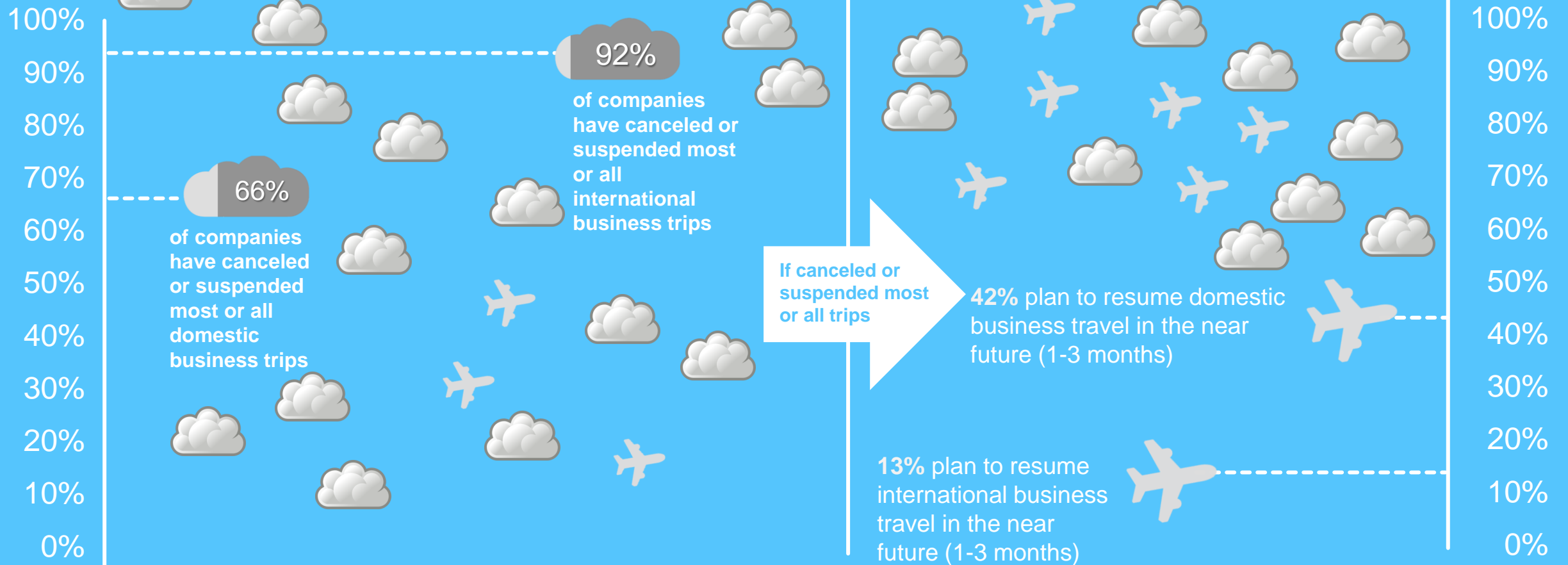
- Fielding took place from May 10 through May 15, 2021
- An email invitation was sent to 16,099 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 529 companies responded 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



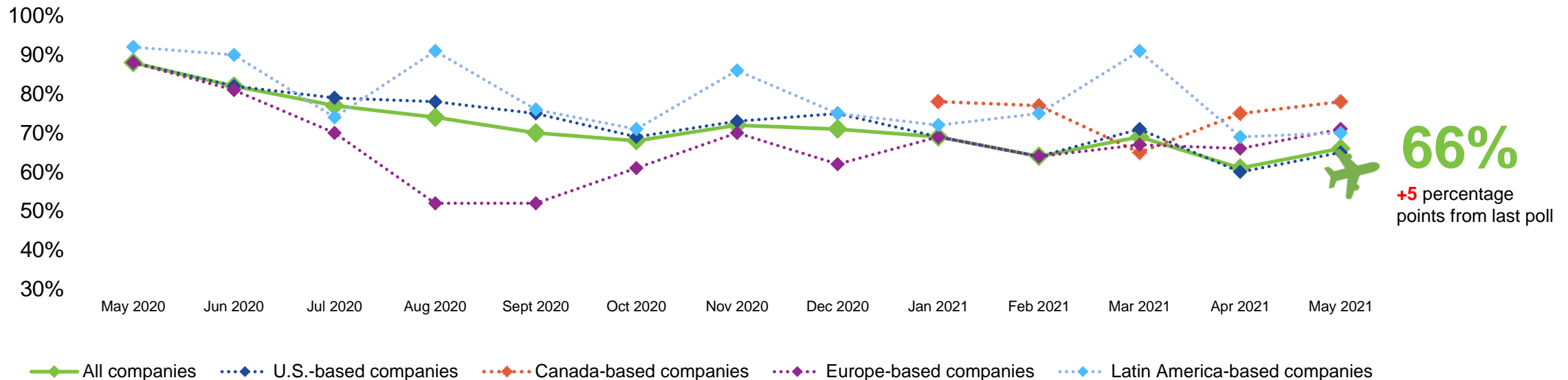
The State of Business Travel

May 2021



The State of Domestic Business Travel

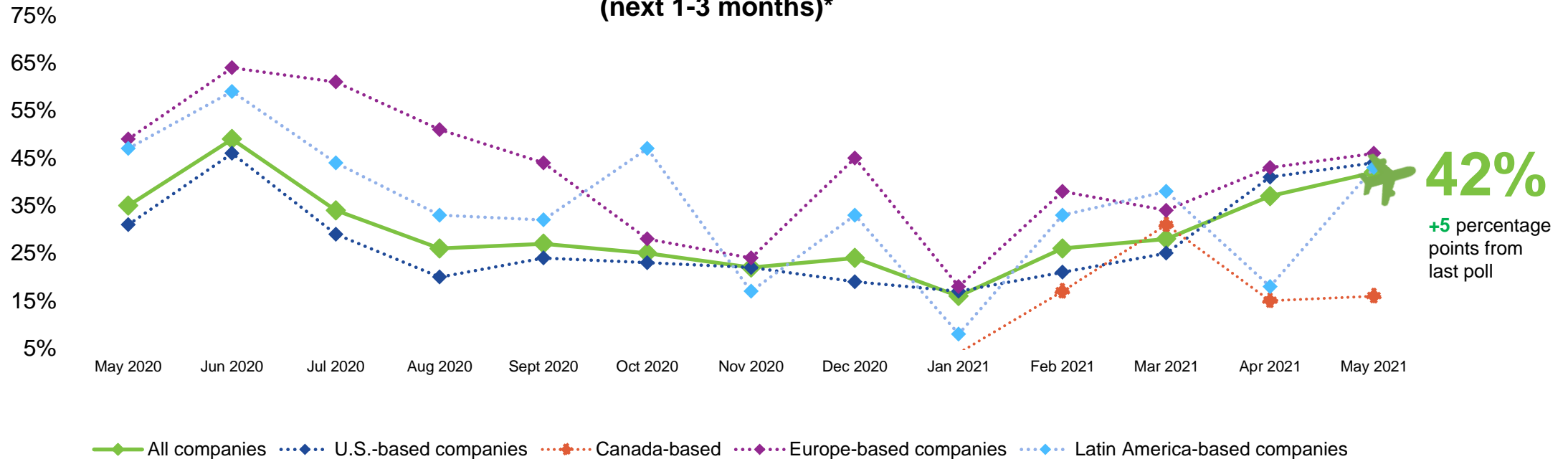
% of companies that have canceled or suspended most or all domestic business travel within their country



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

The State of Domestic Business Travel (Cont.)

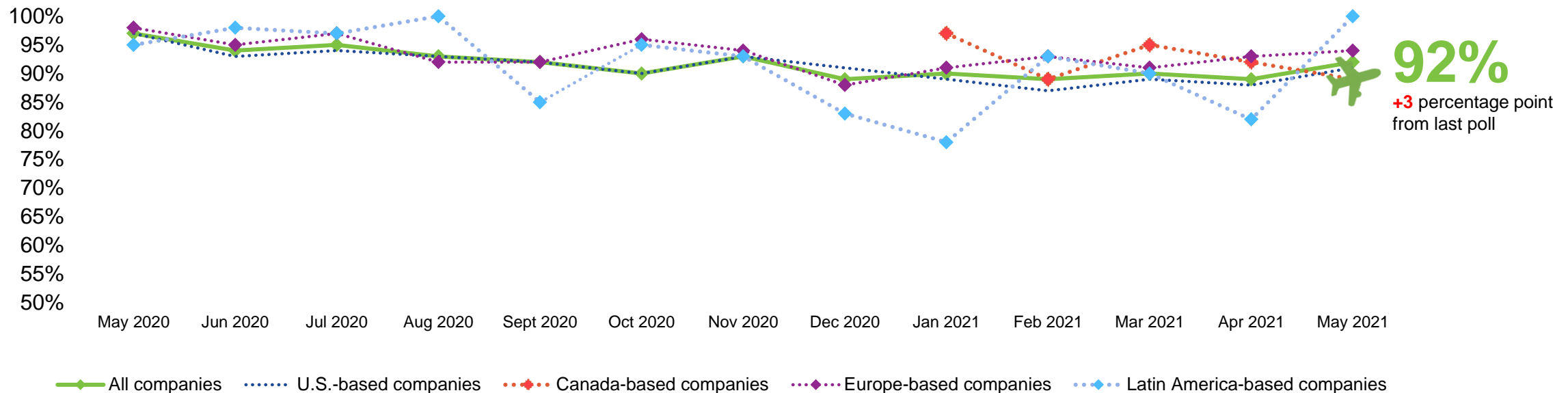
% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*



*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

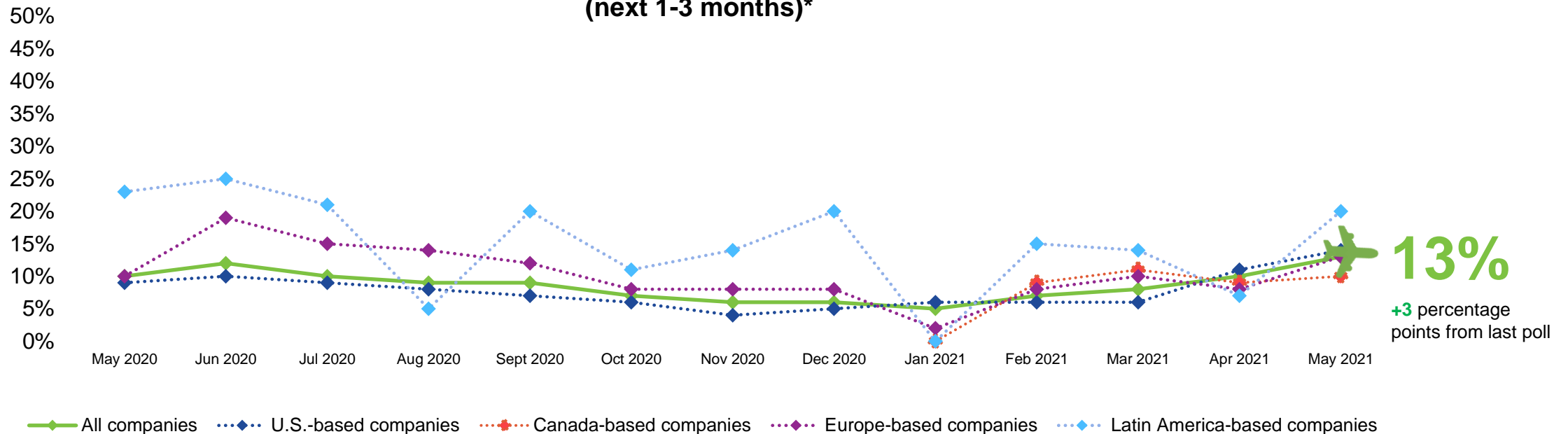
% of companies that have canceled or suspended most or all international business travel



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

The State of International Business Travel (Cont.)

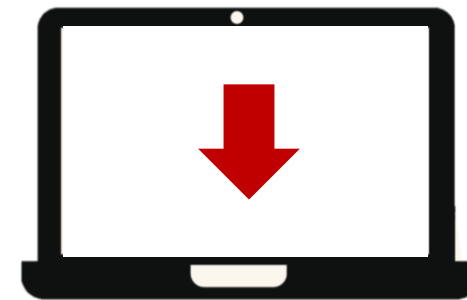
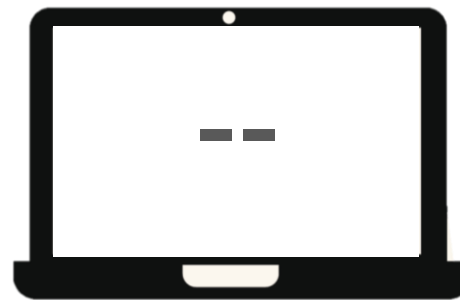
% of companies that plan to resume international business travel in the near future (next 1-3 months)*



*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

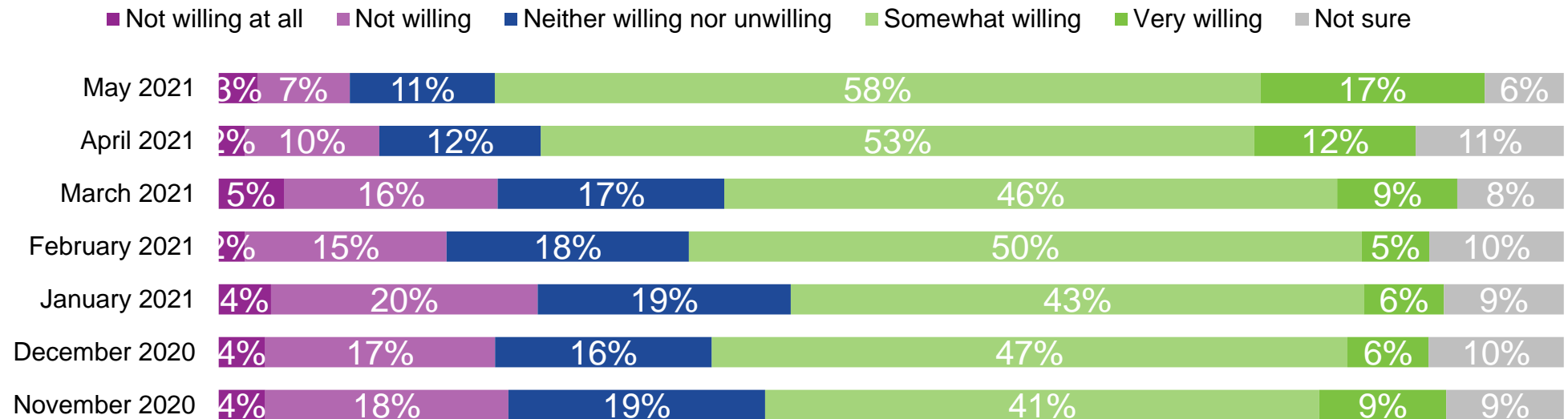
How have bookings from corporate customers changed in the past week?



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?



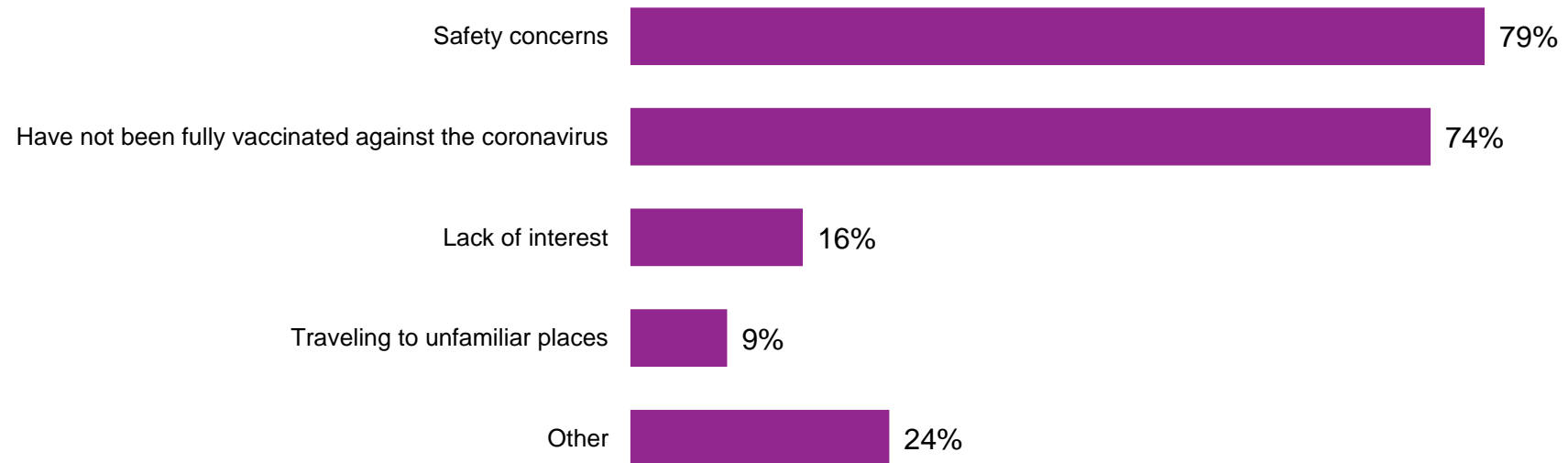
Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

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

Why Are Some Employees Hesitant to Travel for Work?

Why are company's employees hesitant to travel for work?

multiple answers allowed

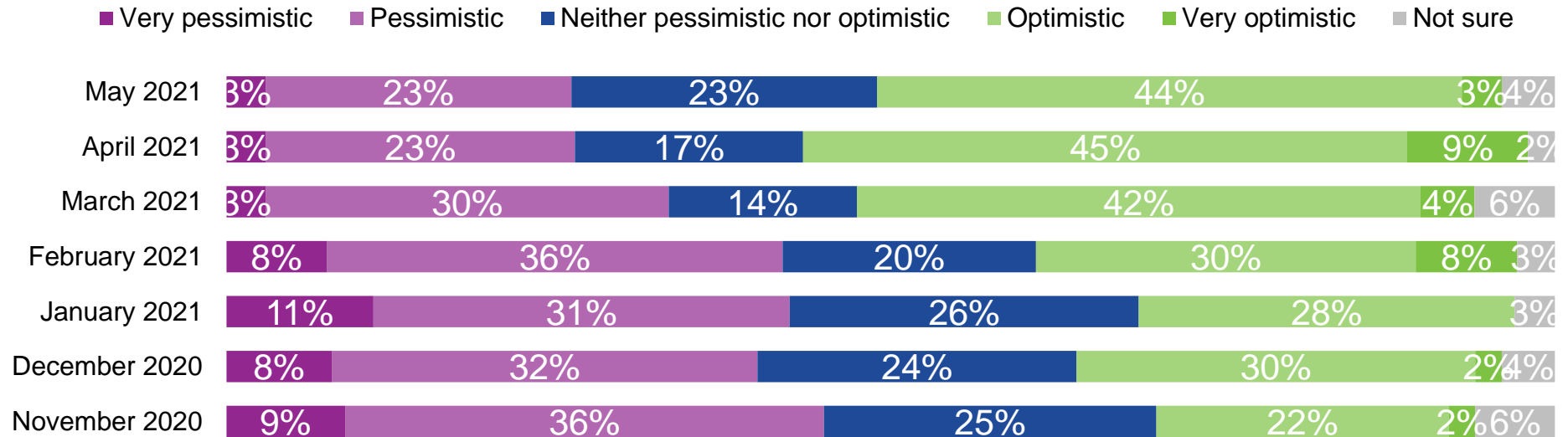


Q. You mentioned some of your company's employees have hesitations regarding resuming business travel. What are the reasons you think some of your employees are hesitant to travel for business?

Note: Only displayed to travel buyers/procurement professionals who indicated their company's employees are "not willing," "not willing at all," or "neither willing or unwilling" to travel for business in the current environment – or they are "not sure" (n=68)

Growing Optimism Among Travel Suppliers

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



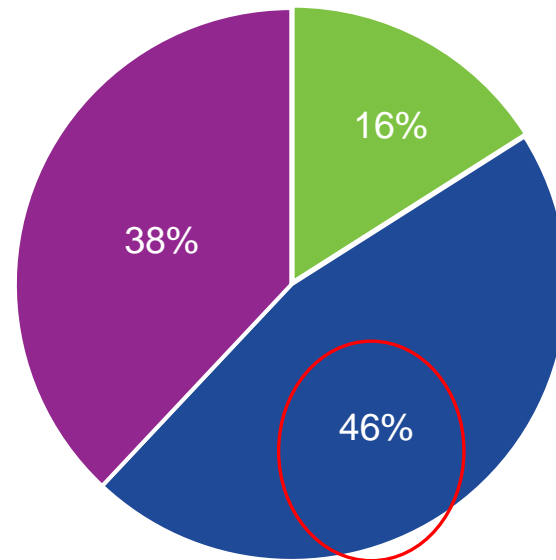
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=188-332)**

Key Highlights



Many Travel Programs Will Resume Travel For All Employees Regardless of Vaccination Status

When will companies resume non-essential business travel?

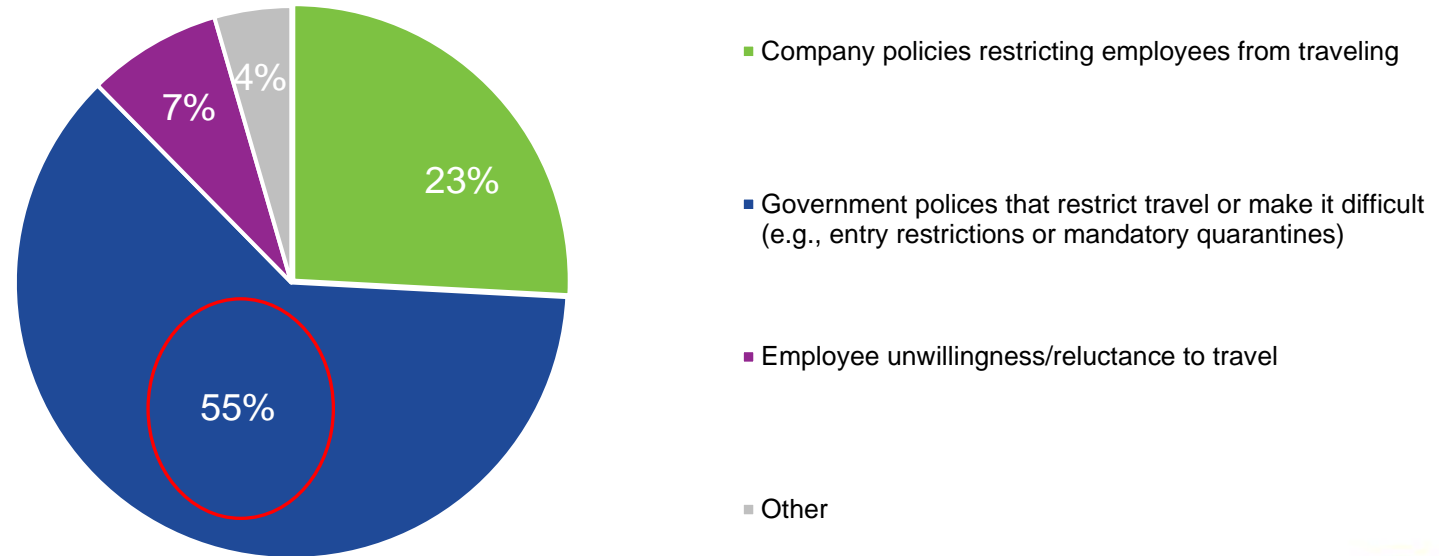


- We will allow our fully vaccinated employees to resume non-essential trips while continuing to limit travel for those who have not been vaccinated
- We will wait until we can resume non-essential travel for all employees at the same time regardless of their vaccination status
- Not sure

Q. Which best describes your company's approach to resuming non-essential business travel?
Note: Question only displayed to travel buyers/procurement professionals (n=287)

Government Policies Still Viewed As Greatest Barrier to Business Travel

What is the single greatest barrier to business travel?

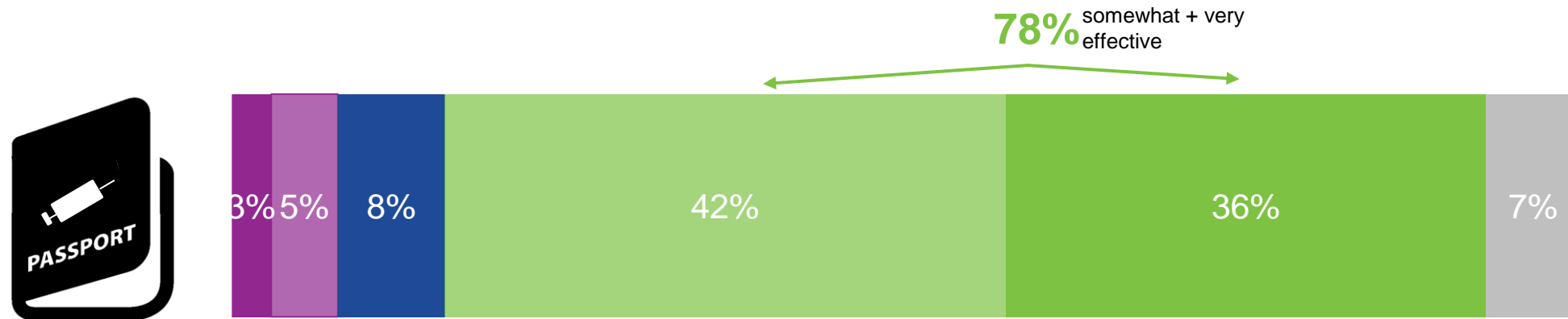


Q. In the current environment, what do you view as the single greatest barrier to business travel? Please select one. (n=529)

Respondents Largely Think Vaccine Passports Will Be Effective

Do respondents think digital health verification/health passports are ...?

■ Very ineffective ■ Ineffective ■ Neither effective nor ineffective ■ Somewhat effective ■ Very effective ■ Not sure

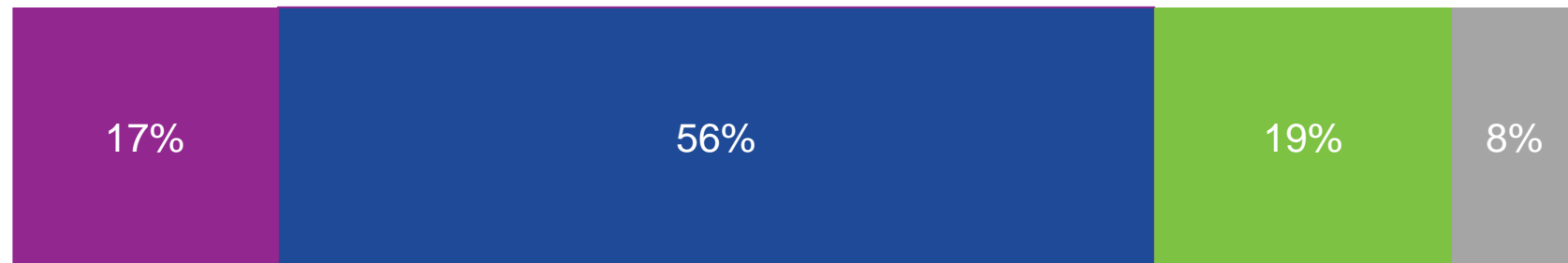


Q. Some countries are considering implementing Digital Health Verification (also known as "vaccination passports") which are government-issued cards or smartphone badges stating the bearer has been inoculated against the coronavirus. The purpose of the vaccine passport is to open up travel and eliminate the need for mandated quarantine and multiple tests. Thinking about government-issued vaccine passports, what statement is closest to your opinion? (n=529)

Are Respondents More Eager to Go on “Bleisure” Trips? Not Necessarily

Are respondents more likely to combine business trips with vacations?

■ Less likely/Much less likely than before the pandemic ■ Equally likely ■ More likely/Much more likely than before the pandemic ■ Not sure

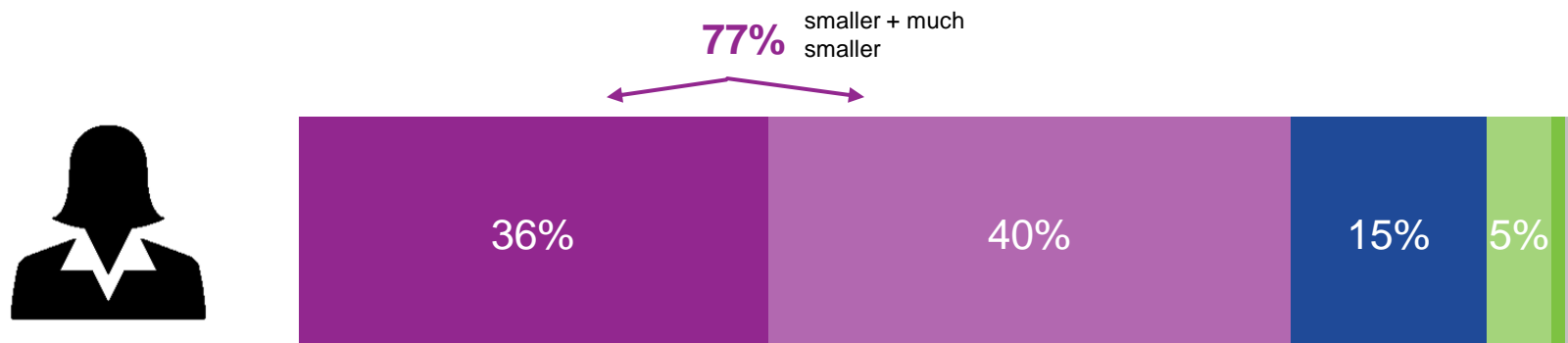


Q. When business travel resumes, please rate your likelihood to extend your business trips for leisure or combine business trips with a personal vacation? (n=529)

Travel Companies Reduced Staff During The Pandemic

Compared to before the pandemic, is the staff size of your company...?

■ Much smaller than before pandemic ■ Smaller ■ The same size ■ Larger ■ Much larger than before pandemic ■ Not sure



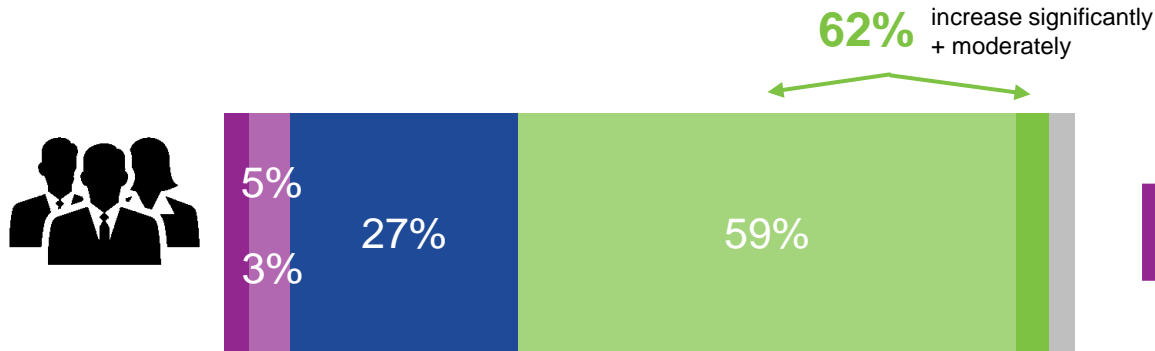
Note: Question only displayed to travel suppliers/TMC employees

Q. Thinking about your company, how would you describe the size of its staff today? **Note: if your company has acquired a company during the pandemic, please do not include the staff from the acquired subsidiary. Select one. (n=188)**

Travel Companies Expect to Re-Staff – But Some Are Concerned About Staffing Issues

How will staff size change in next 6 months?

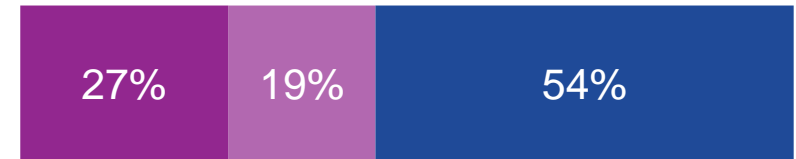
■ Decrease significantly ■ Decrease moderately ■ Remain the same ■ Increase moderately ■ Increase significantly ■ Not sure



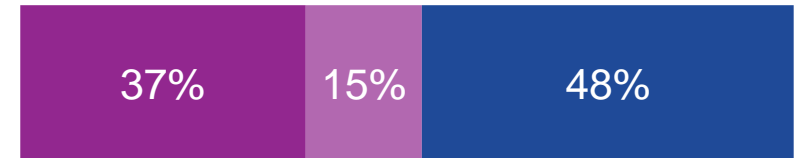
Are respondents concerned that...?

■ Not concerned/Not concerned at all ■ Neither concerned nor unconcerned ■ Concerned/Very concerned

It will be difficult to hire qualified candidates because of competition with other companies that are also re-staffing



It will be difficult to find qualified candidates because many have left the travel industry



Note: Question only displayed to travel suppliers/TMC employees

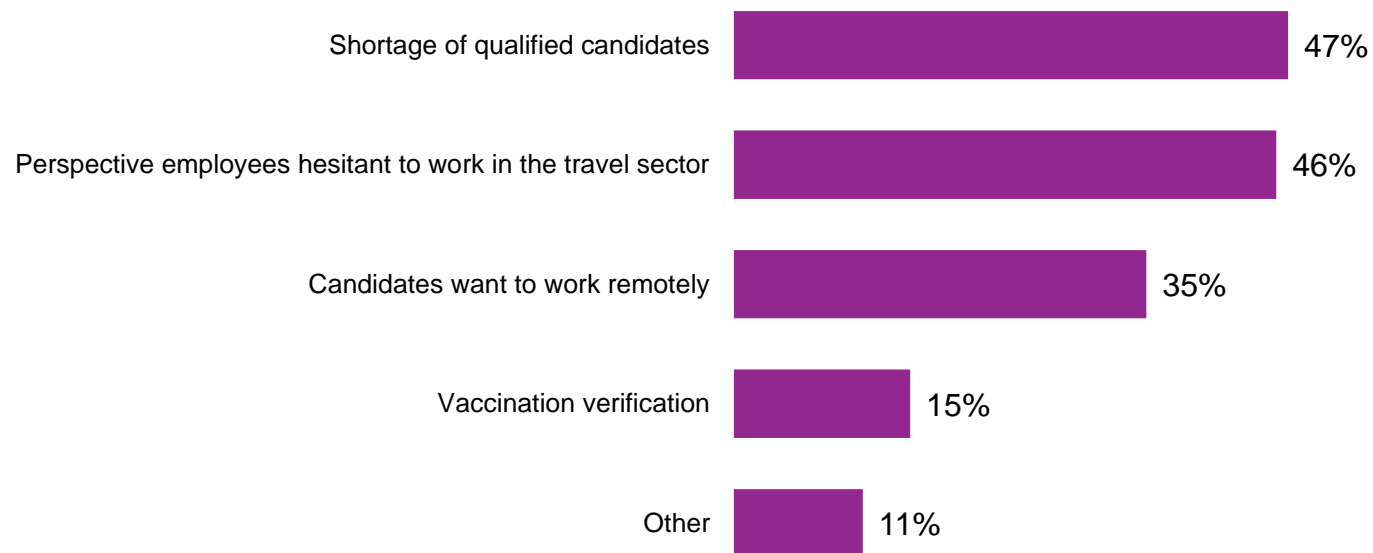
Q. Thinking about the company that you work for, how do you think the size of its staff will change in the next six months? (n=188)

Q. You mentioned you expect the size of your company's staff to increase in the next six months. Please rate your concern about the following. **Note: Question only displayed to travel suppliers/TMC employees (n=116-117)**

Some Concerned About Shortage of Qualified Candidates

What obstacles will travel companies face as they hire more workers?

multiple answers allowed



Q. What are the biggest obstacles, if any, your company will face as more employees are hired in the current environment? **Select all that apply.** (n=179)

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

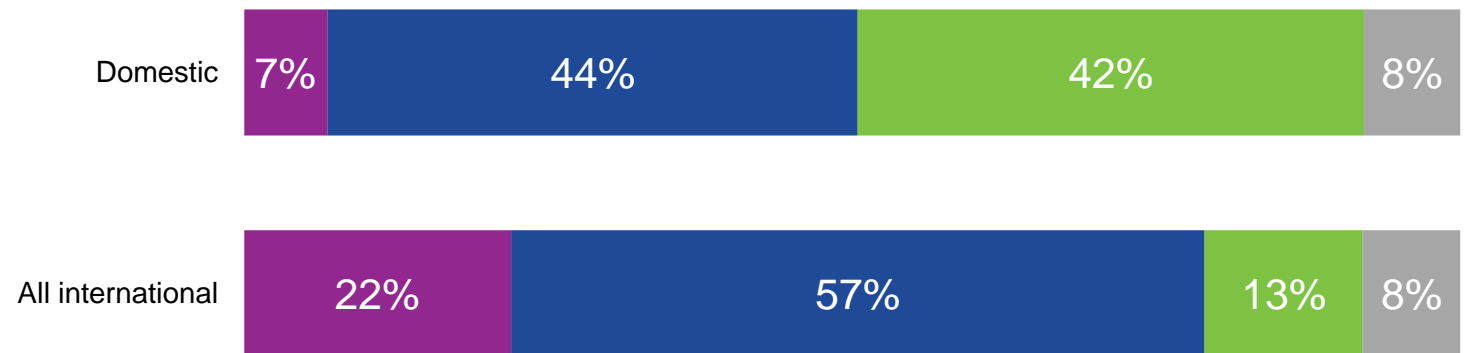
 **92%**
of companies have canceled or suspended **most** (39%) or **all** (53%) international trips

 **66%**
of companies have canceled or suspended **most** (50%) or **all** (17%) 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=320-416)

Q. Thinking about your company, how has the coronavirus impacted business travel to... ? (n=457-486)