Coronavirus Poll Results
January 21, 2021
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 December 11 through December 18, 2020

• An email invitation was sent to 16,126 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, 733 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
January 2021

- 69% of companies have canceled or suspended most or all domestic business trips.
- 90% of companies have canceled or suspended most or all international business trips.
- 16% plan to resume domestic business travel in the near future (1-3 months).
- 5% plan to resume international business travel in the near future (1-3 months).
The State of Domestic Business Travel

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

- 69% -2 percentage point from last poll


All companies U.S.-based companies Europe-based companies Latin America-based companies
The State of Domestic Business Travel (Cont.)

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

-8 percentage points from last poll

16%


All companies U.S.-based companies Europe-based companies Latin America-based companies

*figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country
The State of International Business Travel

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


All companies  U.S.-based companies  Europe-based companies  Latin America-based companies

90%  +1 percentage points from last poll
The State of International Business Travel (Cont.)

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

- All companies
- U.S.-based companies
- Europe-based companies
- Latin America-based companies

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

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Are Employees Willing to Travel for Work?

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=353-409)

- Not willing at all
- Not willing
- Neither willing nor unwilling
- Somewhat willing
- Very willing
- Not sure

<table>
<thead>
<tr>
<th>Time</th>
<th>Not willing at all</th>
<th>Not willing</th>
<th>Neither willing nor unwilling</th>
<th>Somewhat willing</th>
<th>Very willing</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 2021</td>
<td>4%</td>
<td>20%</td>
<td>19%</td>
<td>43%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>December 2020</td>
<td>4%</td>
<td>17%</td>
<td>16%</td>
<td>47%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>November 2020</td>
<td>4%</td>
<td>18%</td>
<td>19%</td>
<td>41%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Business Travel Suppliers Are Pessimistic About the Industry’s Near-Term Prospects

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

<table>
<thead>
<tr>
<th>Month</th>
<th>Very Pessimistic</th>
<th>Pessimistic</th>
<th>Neither Pessimistic nor Optimistic</th>
<th>Optimistic</th>
<th>Very Optimistic</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 2021</td>
<td>11%</td>
<td>31%</td>
<td>26%</td>
<td>28%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>December 2020</td>
<td>8%</td>
<td>32%</td>
<td>24%</td>
<td>30%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>November 2020</td>
<td>9%</td>
<td>36%</td>
<td>25%</td>
<td>22%</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

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
Will Travel Programs Require Employees to Share Vaccination Status or Test Results? Most Haven’t Decided Yet

Will companies require employees to do the following before traveling for business…?

- Certify to our company that they have received a coronavirus vaccine
  - No - we don’t plan to require it: 26%
  - Yes - we plan to require it: 8%
  - Yes - we already require it: 65%
  - Not sure: 8%

- Share record of receiving coronavirus vaccine with our company
  - No - we don’t plan to require it: 27%
  - Yes - we plan to require it: 8%
  - Yes - we already require it: 65%
  - Not sure: 8%

- Certify to our company that they have tested negative for the virus prior to departure
  - No - we don’t plan to require it: 30%
  - Yes - we plan to require it: 8%
  - Yes - we already require it: 9%
  - Not sure: 53%

- Share test results with our company prior to departure
  - No - we don’t plan to require it: 34%
  - Yes - we plan to require it: 5%
  - Yes - we already require it: 6%
  - Not sure: 55%

Q. Thinking about your travel program, do you plan to require employees to do the following before traveling for business in 2021?

Note: Question only displayed to travel buyers/procurement professionals (n=368-372)
Some Travel Managers Are Comfortable With “Digital Health” Passports; Others Are Not Sure

Q. Some airlines will begin using mobile apps known as “digital health passports” to verify compliance with their COVID-related policies. For instance, they might verify if a passenger has received a vaccination or tested negative for the virus. To protect passenger privacy, these apps will not share specific details with the airlines. They will only allow airlines to confirm if passengers have met their requirements to travel. Please rate your comfort with travel suppliers—such as airlines or hotels—using mobile apps to verify the health status of passengers.

Note: Only displayed to travel managers/procurement professionals (n=380)
Will Return to Travel Follow a Return to the Office?

When do companies plan to…?

Q. Thinking about your company, when does it plan to have most of its employees return to the office? (n=701)

Q. Still thinking about your company, when do you think it is most likely to resume non-business critical travel? (n=692)
Giving Essential Travel Workers Vaccine Priority Could Boost Comfort With Traveling

If essential travel workers receive priority for a COVID vaccine, would this make you feel more comfortable about your company’s employees traveling?

- 8% Not at all
- 18% A little bit
- 37% Somewhat
- 28% A great deal
- 9% Not sure

Q. When administering the coronavirus vaccine, some countries have given priority to essential workers. These workers represent a variety of different sectors. Some have advocated for classifying certain travel industry workers—such as flight attendants, pilots, and hotel employees — as essential workers. This could allow them to receive their vaccination before the general population. To what extent would this make you feel more comfortable about your company’s employees traveling on business? (n=667)
On Average, Buyers Expect Their Travel Spend Will Be 52% Lower in 2021 Than Before the Pandemic

Will travel spend bounce back in 2021?

- The 2021 travel spend will be lower than 2019 (90%)
- The 2021 travel spend will be approximately the same as 2019 (3%)
- The 2021 travel spend will be higher than 2019 (6%)
- Don’t know (3%)

Q. What do you think your company’s travel spend will be in 2021 compared to 2019 (i.e., pre-pandemic)? Note: Results filtered for travel buyers/procurement professionals (n=374)

On average, respondents estimate their 2021 travel spend will be lower than in 2019.

Q. What do you think your company’s travel spend will be in 2021 compared to 2019 (i.e., pre-pandemic)? Note: Results filtered for travel buyers/procurement professionals who expect their company’s travel spend to be lower in 2021 than in 2019 (n=314)
Suppliers See Corporate Bookings Decline

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

- 10% Our bookings have increased
- 61% Our bookings have remained the same
- 28% Our bookings have decreased

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 week? (n=173)
Business Travel Still Grounded…

- **China**: 93% of companies have canceled or suspended most (27%) or all (66%) trips to China.
- **APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)**: 91% of companies have canceled or suspended most (31%) or all (60%) trips to other APAC countries.
- **Latin America**: 91% of companies have canceled or suspended most (36%) or all (55%) trips to Latin America.
- **Canada**: 86% of companies have canceled or suspended most (37%) or all (49%) trips to Canada.
- **International trips**: 90% of companies have canceled or suspended most (42%) or all (48%) international trips.
- **United States**: 77% of companies have canceled or suspended most (46%) or all (31%) trips to the United States.
- **Domestic travel**: 69% of companies have canceled or suspended most (48%) or all (20%) domestic travel within their own country.

Q. Thinking about your company, how has the coronavirus impacted business travel to…? (n=331-536)
Companies Consider Resuming Travel – But Few Have Definite Plans

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Do not plan</th>
<th>Have considered</th>
<th>Plan to resume</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>19%</td>
<td>54%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>United States</td>
<td>26%</td>
<td>51%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Europe</td>
<td>28%</td>
<td>46%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Canada</td>
<td>29%</td>
<td>48%</td>
<td>9%</td>
<td>15%</td>
</tr>
<tr>
<td>All international</td>
<td>32%</td>
<td>49%</td>
<td>5%</td>
<td>14%</td>
</tr>
<tr>
<td>Other Asia Pacific countries</td>
<td>33%</td>
<td>44%</td>
<td>5%</td>
<td>18%</td>
</tr>
<tr>
<td>Latin America</td>
<td>35%</td>
<td>44%</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Middle East</td>
<td>35%</td>
<td>43%</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>China</td>
<td>35%</td>
<td>44%</td>
<td>5%</td>
<td>16%</td>
</tr>
</tbody>
</table>

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=276-402)