

Coronavirus Poll Results

February 18, 2021

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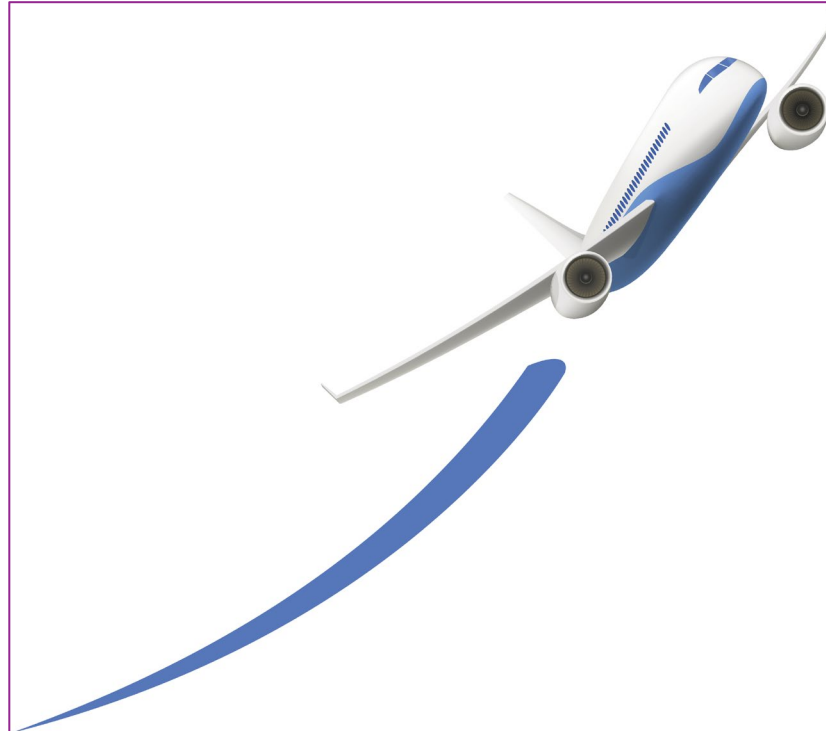


Methodology

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

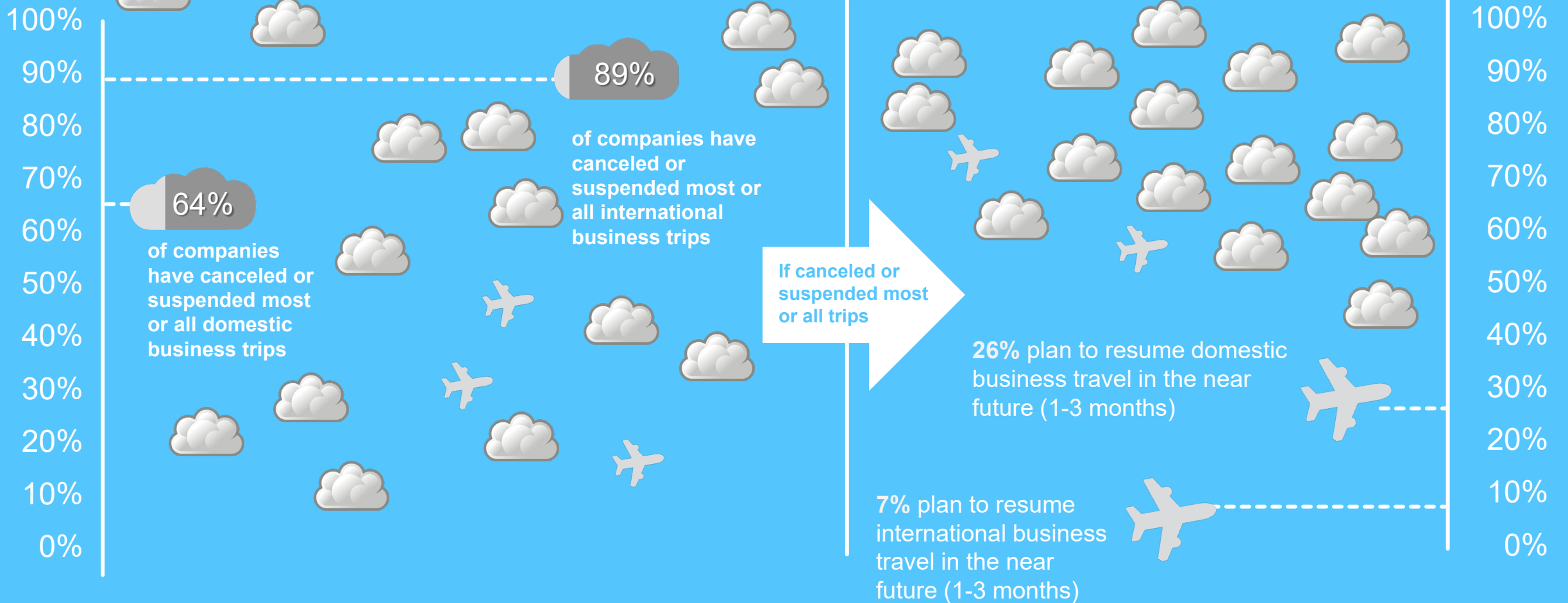
- Fielding took place from February 8 through February 18, 2021
- An email invitation was sent to 16,035 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 779 companies 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



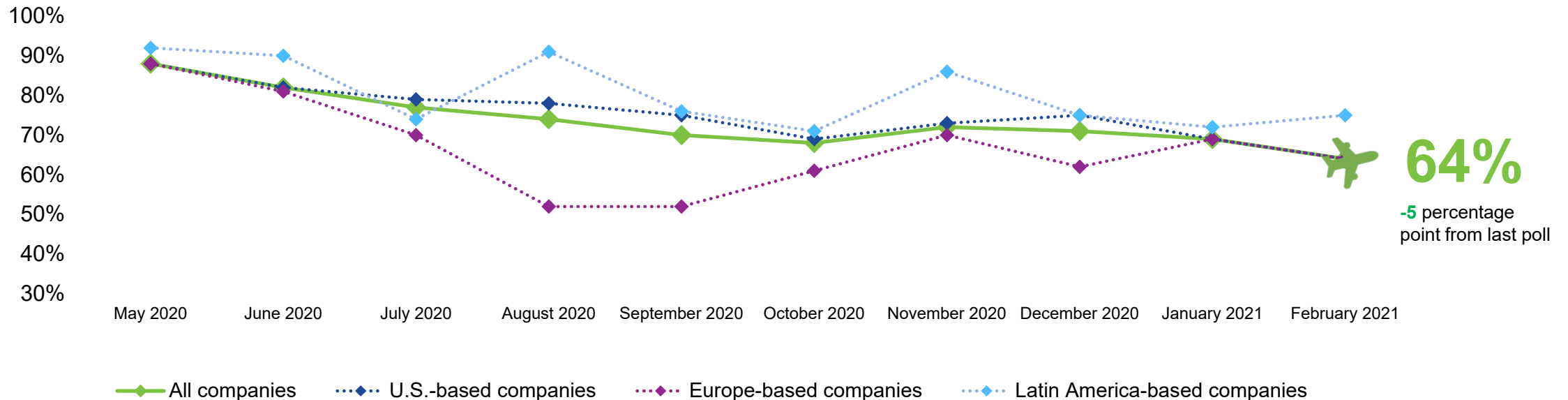
The State of Business Travel

February 2021



The State of Domestic Business Travel

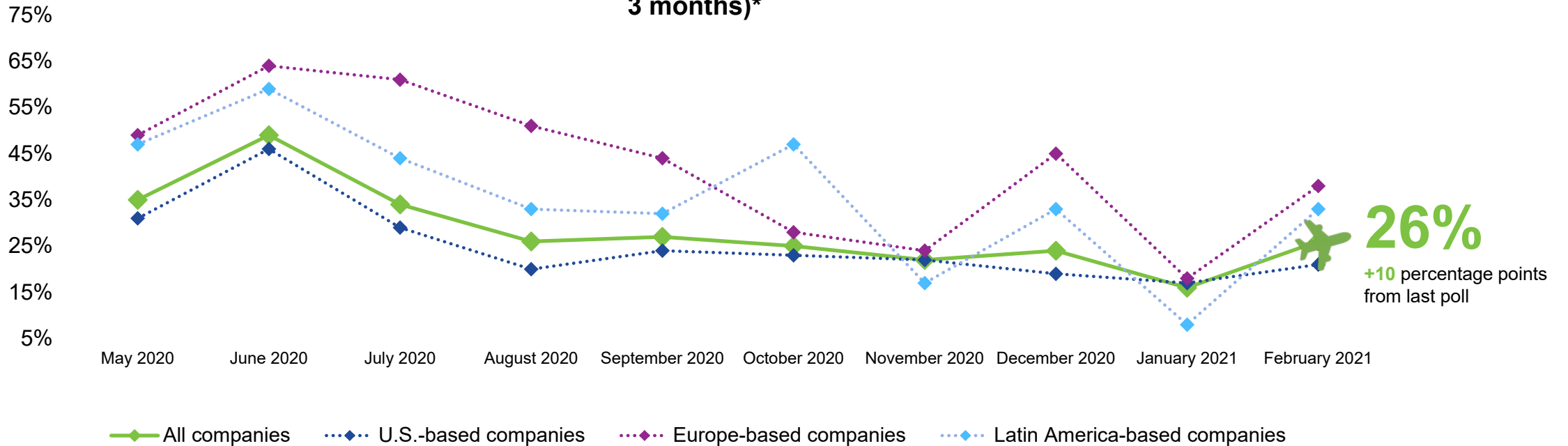
% of companies that have canceled or suspended most or all domestic business travel within their country



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)*

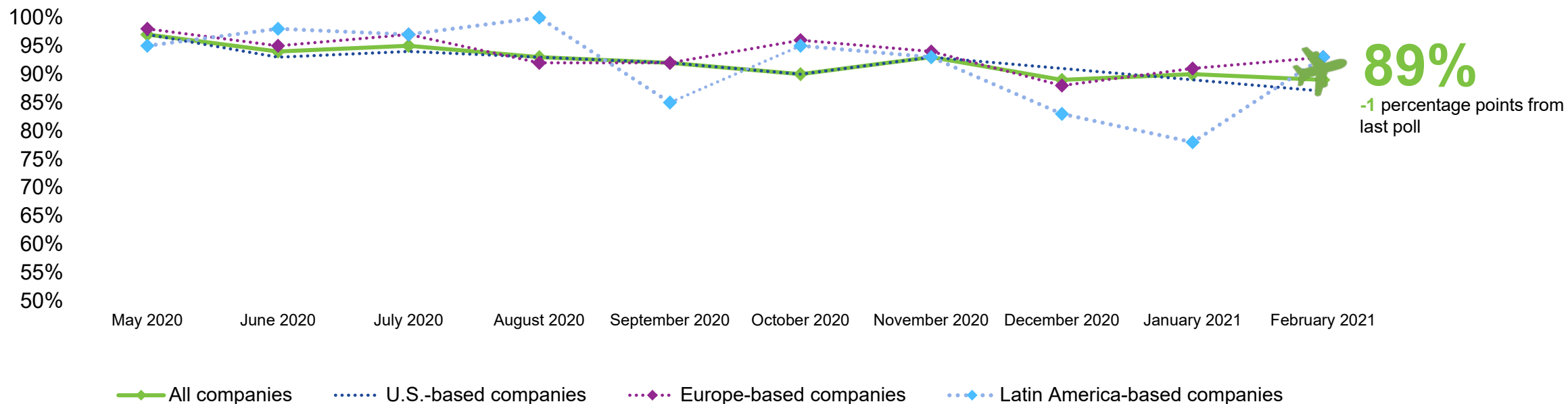


*figures are among those that indicated their company has canceled or suspended most or all domestic business trips within their country
 Note: Small sample size for Latin America-based respondents in recent polls (n<30)



The State of International Business Travel

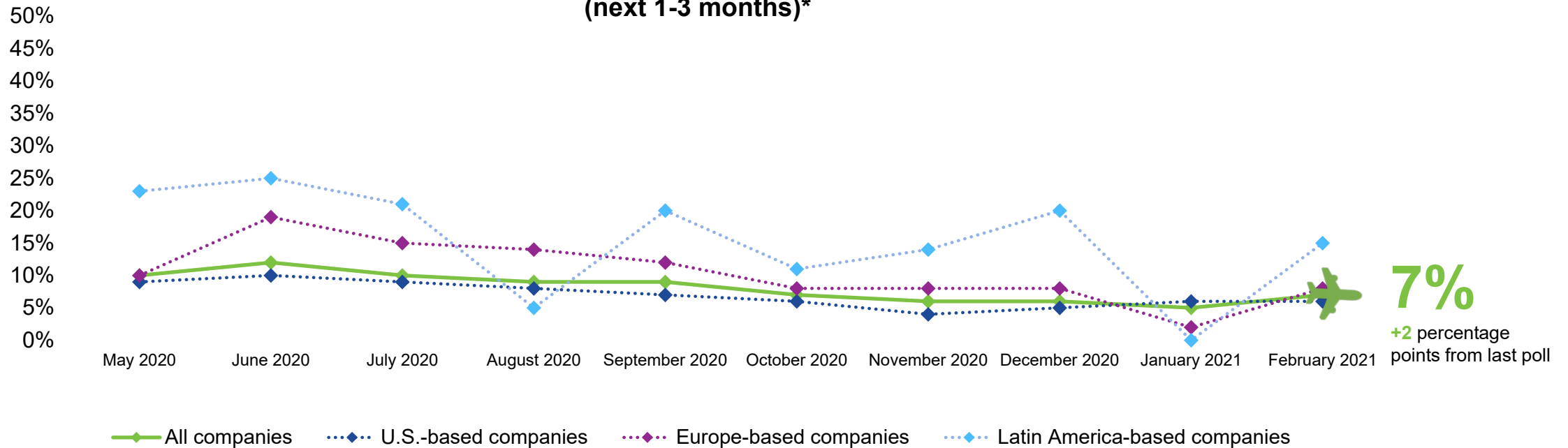
% of companies that have canceled or suspended most or all international business travel



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

The State of International Business Travel (Cont.)

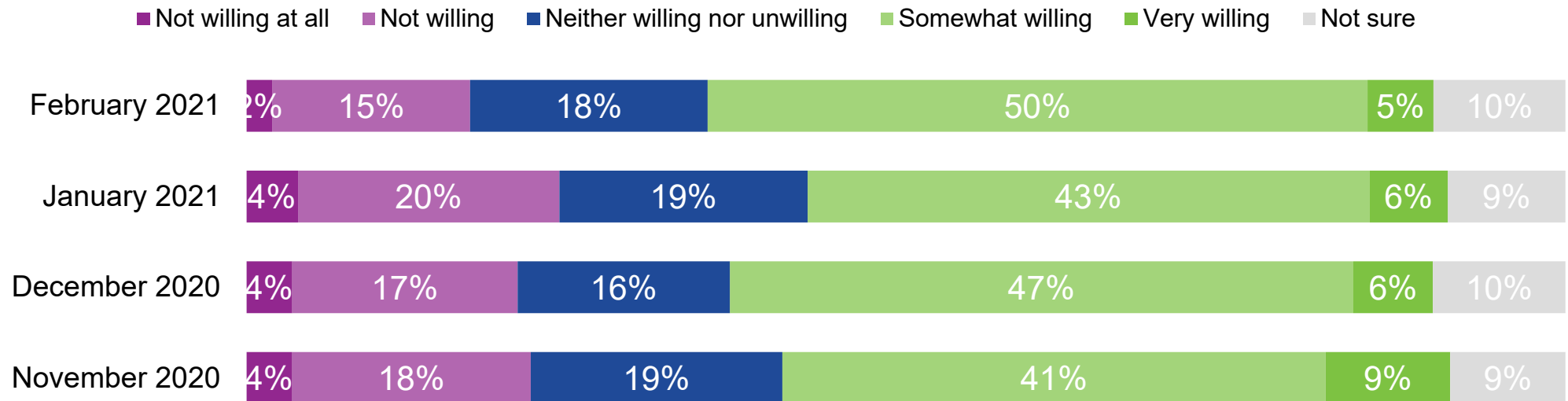
% of companies that plan to resume international business travel in the near future (next 1-3 months)*



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

Are Employees Willing to Travel for Work?

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

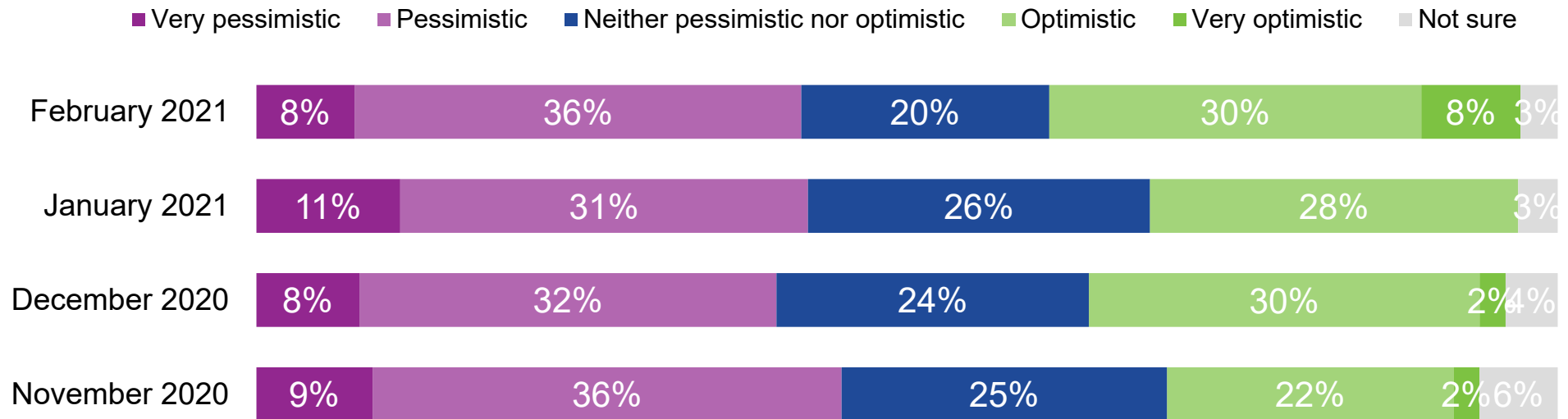


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=347-409)

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?



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



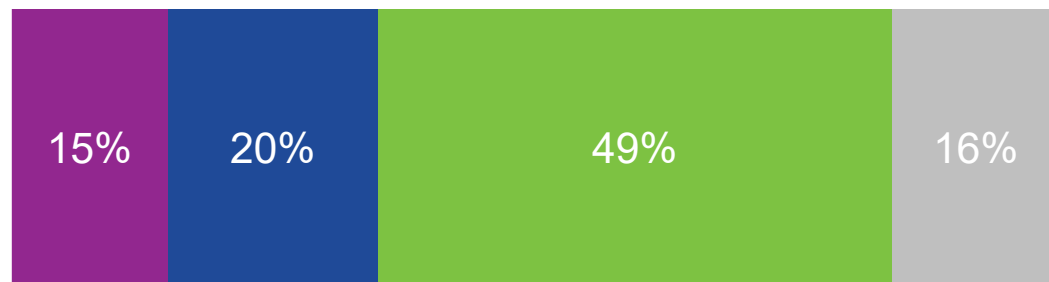
Respondents Largely Think Mandated Testing/ Vaccines Are a Good Policy

Do respondents think....



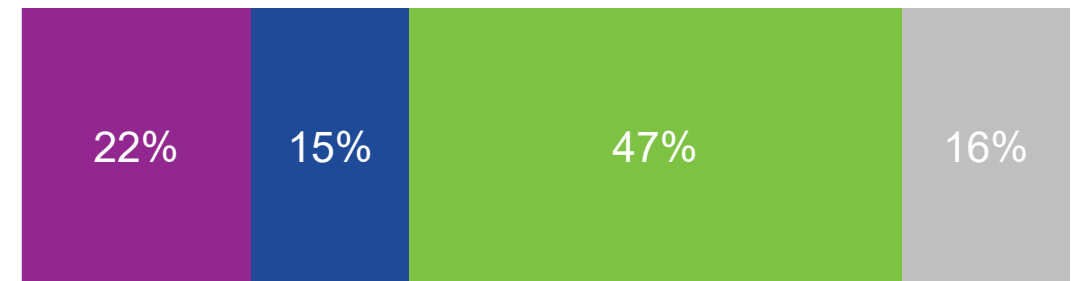
Companies mandating their employees take COVID-19 tests before traveling is...

■ A bad policy ■ Indifferent ■ A good policy ■ Not sure



Companies asking their employees receive a COVID-19 vaccine before traveling is...

■ A bad policy ■ Indifferent ■ A good policy ■ Not sure



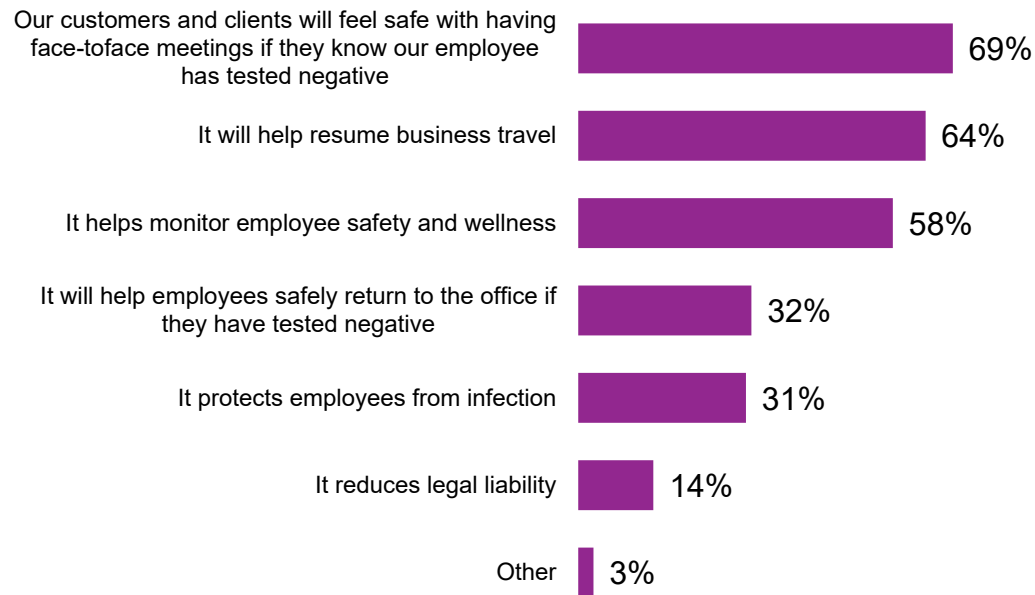
Q. Some companies are considering mandating Covid-19 testing before employees can travel for work. Thinking about companies mandating testing for their employees, what statement is closest to your opinion on the topic of mandated testing? (n=748)

Q. Some companies have considered asking employees to receive a Covid-19 vaccine before they can travel for business. Do you think this is...? (n=735)

Why Is Mandating COVID-19 Testing Before Employees Can Travel...?

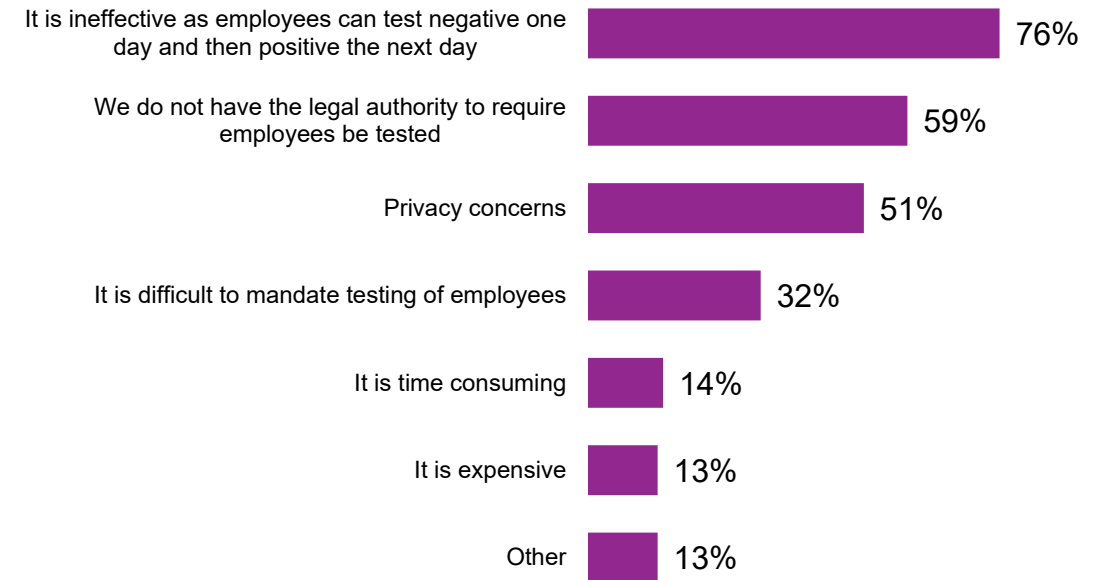
A good policy

% included in top 3 reasons (out of 6 tested)



A bad policy

% included in top 3 reasons (out of 6 tested)



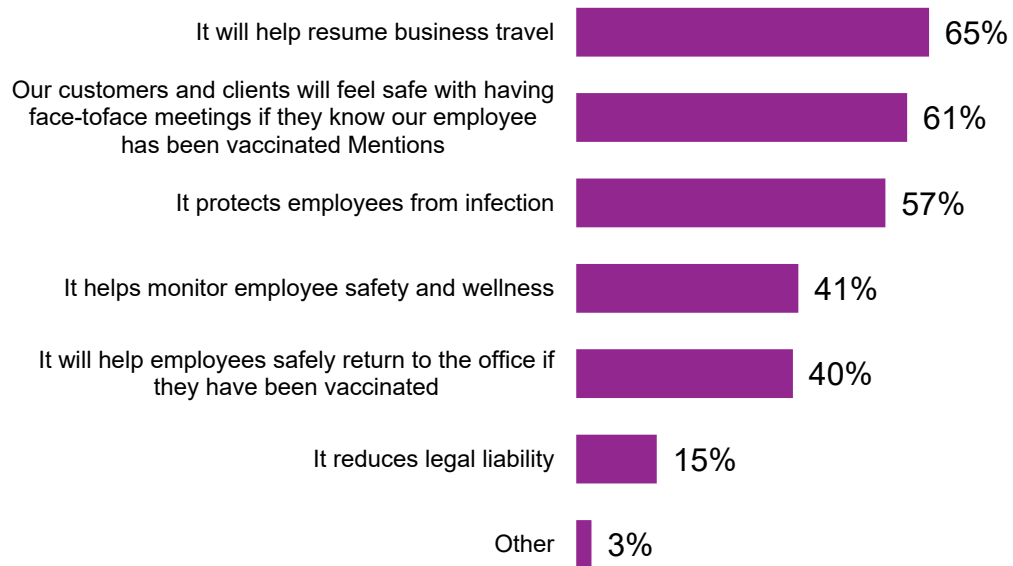
Q. You mentioned you think mandated testing for employees before they can travel for work is a good policy. Why do you think this is a good policy? Please select up to three (3) reasons. **Note:** Question displayed to respondents who it is a good policy for companies to mandate their employees take a COVID-19 test before traveling for business (n=361)

Q. You mentioned you think mandated testing for employees before they can travel for work is a bad policy. Why do you think this is a bad policy? Please select up to three (3) reasons. **Note:** Question displayed to respondents who said it is a bad policy for companies to mandate their employees take a COVID-19 test prior to traveling for business (n=111)

Why Is Asking Employees to Receive a Vaccine Prior to Travel...?

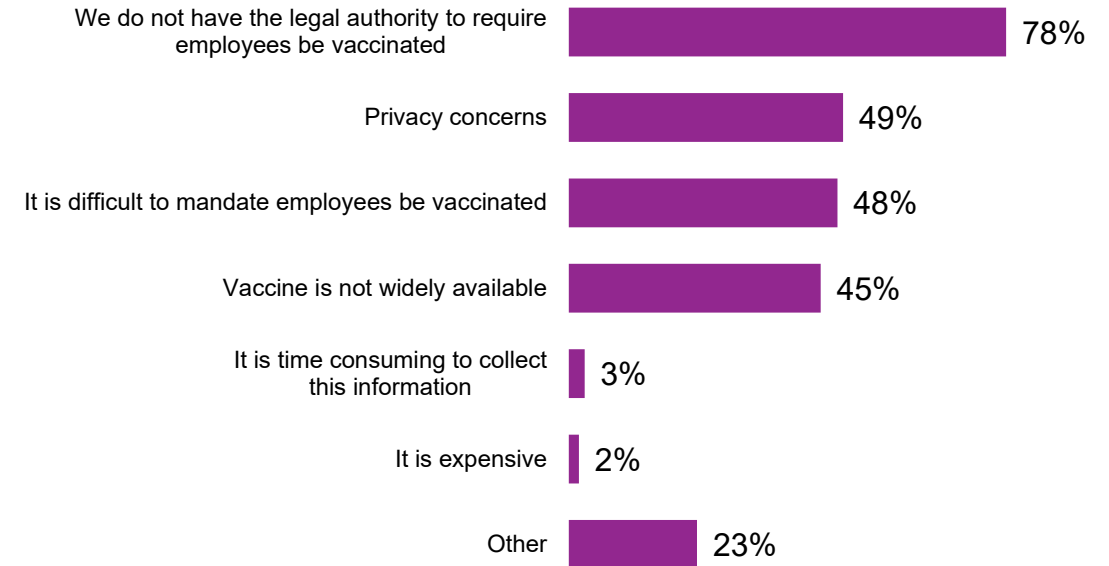
A good policy

% included in top 3 reasons (out of 6 tested)



A bad policy

% included in top 3 reasons (out of 6 tested)



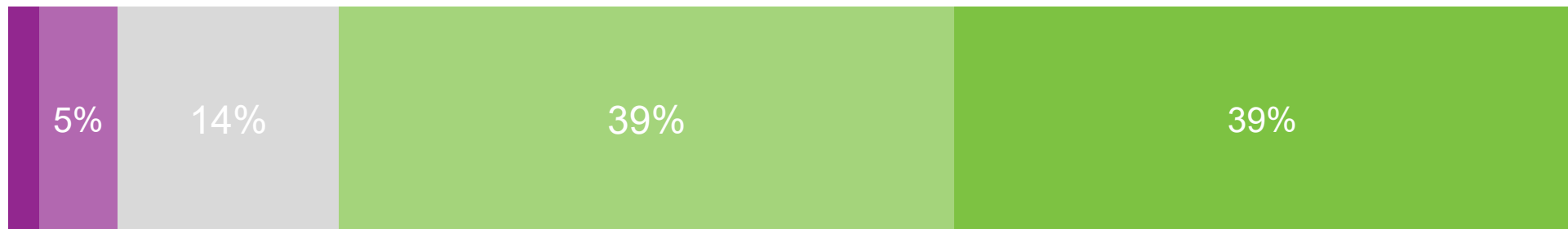
Q. You mentioned you think asking employees to take the vaccine before they can travel for work is a good policy. Why do you think this is a good policy? Please select up to three reasons. **Note: Question displayed to respondents who said it is a good policy for companies to ask their employees to receive a vaccine before traveling for business (n=329)**

Q. You mentioned you think asking employees to take the vaccine before they can travel for work is a bad policy. Why do you think this is a bad policy? Please select up to three (3) reasons. **Note: Question displayed to respondents who said it is a bad policy for companies to ask their employees to receive a vaccine before traveling for business (n=152)**

Most Respondents Will Feel Comfortable Traveling For Work After Receiving the COVID-19 Vaccine

Will respondents feel comfortable traveling for work after receiving the COVID-19 vaccine?

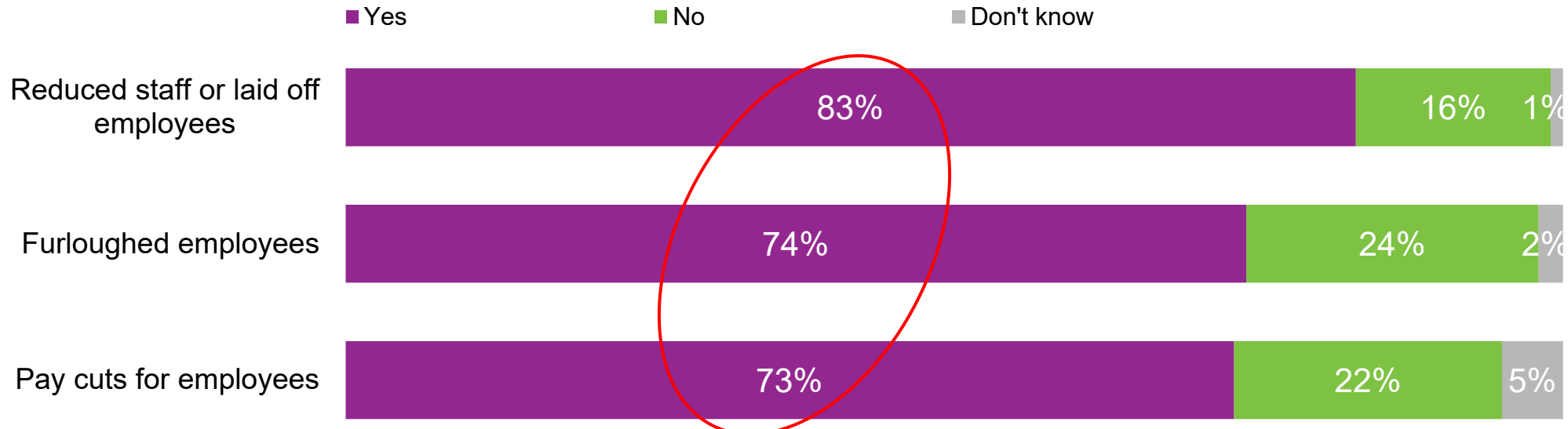
■ Not comfortable at all ■ Not comfortable ■ Neither comfortable nor uncomfortable ■ Somewhat comfortable ■ Very comfortable



Q. Assuming you receive a Covid-19 vaccine in the next couple months, how do you think you will feel about traveling for business in 2021? (n=692)

The Pandemic Forces Travel Companies to Make Difficult Decisions

Has your company taken the following actions as a result of the coronavirus?

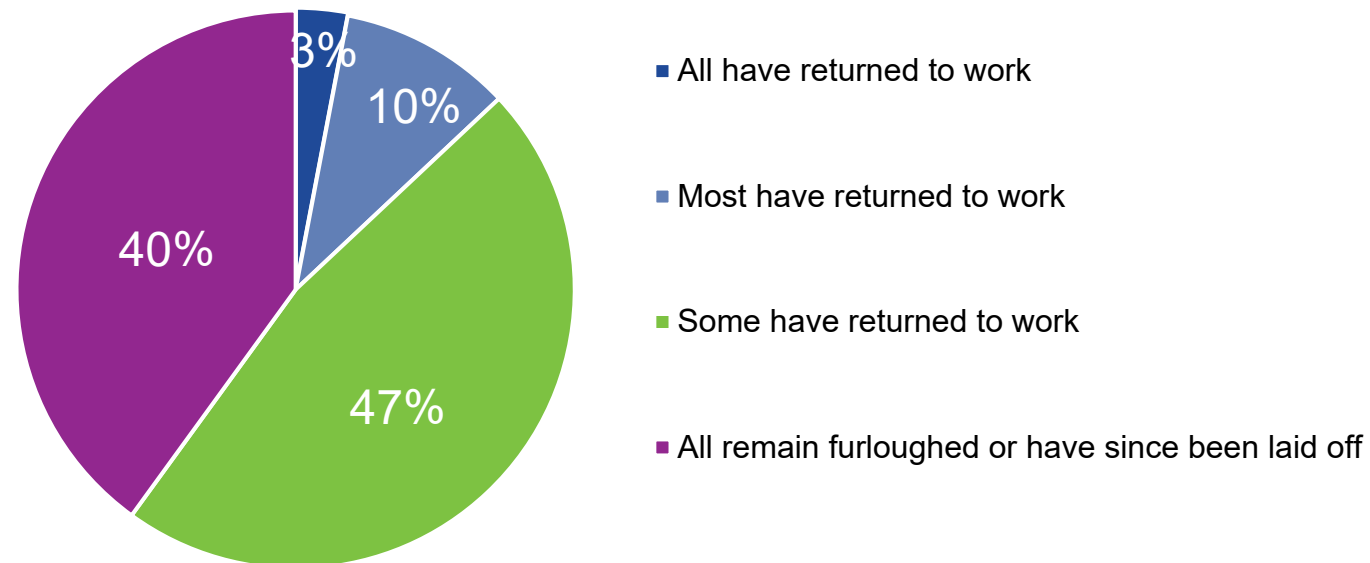


Results filtered for suppliers/TMCs



However, Many Furloughed Employees Have Returned to Work

Have Furloughed Employees Returned to Work?

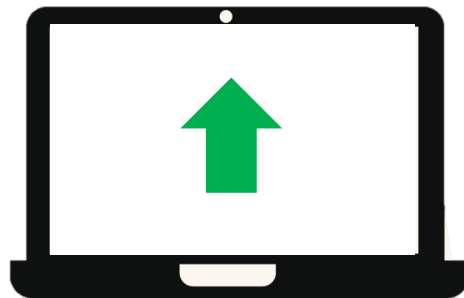


Q. You mentioned your company furloughed employees as a result of the coronavirus. Thinking about the employees who were affected, which of the following best describes their current status?

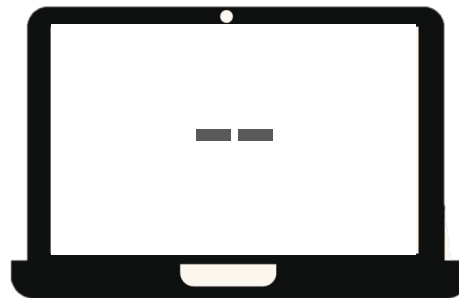
Note: Results filtered for travel suppliers/TMCs who indicated their company has furloughed employees as a result of the pandemic (n=193)

Suppliers See Corporate Bookings Decline

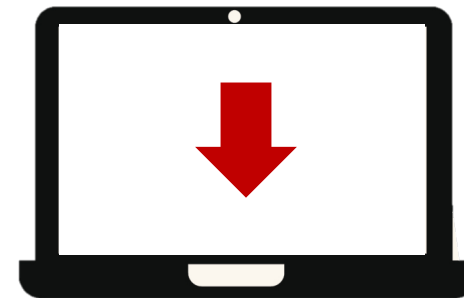
How have bookings from corporate customers changed in the past week?



19% Our bookings have increased



58% Our bookings have remained the same



23% Our bookings have decreased

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

Business Travel Still Grounded...



93%

of companies have canceled or suspended **most** (21%) or **all** (72%) trips to China



89%

of companies have canceled or suspended **most** (28%) or **all** (61%) trips to Latin America



86%

of companies have canceled or suspended **most** (26%) or **all** (60%) trips to Canada



89%

of companies have canceled or suspended **most** (36%) or **all** (53%) international trips



91%

of companies have canceled or suspended **most** (25%) or **all** (66%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



87%

of companies have canceled or suspended **most** (33%) or **all** (53%) trips to European countries



75%

of companies have canceled or suspended **most** (42%) or **all** (32%) trips to the United States



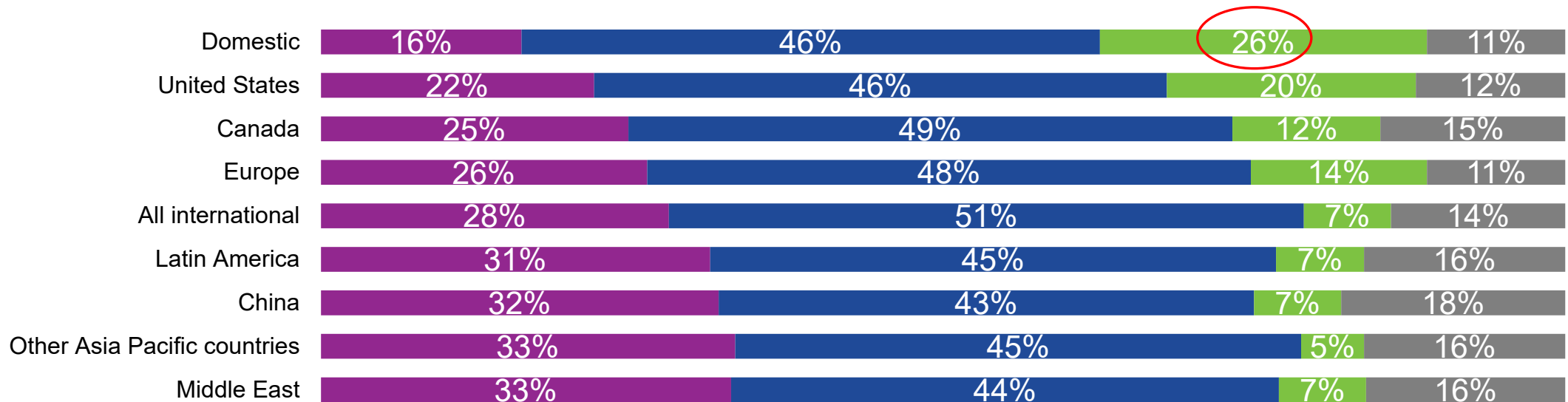
64%

of companies have canceled or suspended **most** (46%) or **all** (19%) domestic travel within their own country

One-Quarter (26%) of Companies Plan to Resume Domestic Business Travel in the Near Future—Up From 16% in the Last Poll

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=282-422)