Coronavirus Poll Results
March 18, 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 March 8 through March 13, 2021

• An email invitation was sent to 16,091 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, 680 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
March 2021

90% of companies have canceled or suspended most or all domestic business trips.

69% of companies have canceled or suspended most or all international business trips.

28% plan to resume domestic business travel in the near future (1-3 months).

13% 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

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

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)*

- 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
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

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Most Buyers Expect Non-Essential Domestic Business Travel to Resume This Year

When do buyers/procurement professionals expect their company will resume...

Non-essential domestic business travel

- Already resumed: 7%
- Q1 2021: 9%
- Q2 2021: 33%
- Q3 2021: 27%
- Q4 2021: 16%
- Q1 2022: 3%
- Q2 2022: 4%
- Q3 2022: 2%
- Q4 2022: 5%

Non-essential international business travel

- Already resumed: 3%
- Q1 2021: 18%
- Q2 2021: 21%
- Q3 2021: 35%
- Q4 2021: 12%
- Q1 2022: 4%
- Q2 2022: 5%

Q. When do you think your company will resume...?  Note: Question only displayed to travel buyers/procurement professionals (n=302-311)
A Decent Number of Suppliers See Future Bookings Increase

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

- 40% Our bookings have increased
- 48% Our bookings have remained the same
- 7% Our bookings have decreased

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?**

<table>
<thead>
<tr>
<th>Month</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>March 2021</td>
<td>5%</td>
<td>16%</td>
<td>17%</td>
<td>46%</td>
<td></td>
<td>9%</td>
</tr>
<tr>
<td>February 2021</td>
<td>2%</td>
<td>15%</td>
<td>18%</td>
<td>50%</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>January 2021</td>
<td>4%</td>
<td>20%</td>
<td>19%</td>
<td>43%</td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>December 2020</td>
<td>4%</td>
<td>17%</td>
<td>16%</td>
<td>47%</td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>November 2020</td>
<td>4%</td>
<td>18%</td>
<td>19%</td>
<td>41%</td>
<td></td>
<td>9%</td>
</tr>
</tbody>
</table>

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=314-409)*
Business Travel Suppliers More Optimistic About 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)

March 2021: 3% Very pessimistic, 30% Pessimistic, 14% Neither pessimistic nor optimistic, 42% Optimistic, 4% Very optimistic, 6% Not sure
February 2021: 8% Very pessimistic, 36% Pessimistic, 20% Neither pessimistic nor optimistic, 30% Optimistic, 8% Very optimistic, 3% Not sure
January 2021: 11% Very pessimistic, 31% Pessimistic, 26% Neither pessimistic nor optimistic, 28% Optimistic, 3% Very optimistic, 3% Not sure
December 2020: 8% Very pessimistic, 32% Pessimistic, 24% Neither pessimistic nor optimistic, 30% Optimistic, 2% Very optimistic, 4% Not sure
November 2020: 9% Very pessimistic, 36% Pessimistic, 25% Neither pessimistic nor optimistic, 22% Optimistic, 2% Very optimistic, 6% Not sure
Key Highlights
Respondents Largely Think Digital Health Verification Is a Good Policy

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

- A bad policy: 11%
- Indifferent: 15%
- A good policy: 66%
- Not sure: 8%

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=655)
Why Is Digital Health Verification of Travelers…?

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

- It will help employees safely resume business travel: 77%
- It is a quick and easy way to prove people have been vaccinated: 64%
- It will eliminate the need to quarantine: 57%
- It will help promote economic growth: 34%
- Our customers and clients will feel safe with having face-to-face meetings if they know our employee has tested negative: 24%
- It will help open meetings and conferences: 22%
- Other: 3%

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

- Privacy concerns: 73%
- It punishes countries who do not issue health passports: 40%
- It is unnecessary: 30%
- It will be difficult to enforce: 27%
- It will take too long to implement: 19%
- It may not be recognized internationally: 17%
- It can be forged: 17%
- Other: 31%

Q. You mentioned you think issuing vaccine passport is a good policy. Why do you think this is a good policy? Please select up to three reasons. (n=437)

Q. You mentioned you think issuing vaccine passport is a bad policy. Why do you think this is a bad policy? Please select up to three reasons. (n=70)
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

6% 10% 36% 49%

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=591)
Most Companies Expect to Return to the Office in the Next 6 Months

Q. In light of the vaccination programs and decline in Covid-19 cases, when does your company plan to have most (if not all) employees return to the office? (n=573)

When will companies have most or all employees return to the office?

- 7% We are currently
- 13% 1-3 months
- 38% 4-6 months
- 23% 7-9 months
- 11% 10-12 months
- 8% More than 12 months
After Offices Reopen, Employees Will Work From Home More Than in the Past

Q. After your office reopens to employees, do you expect they will commute to the office less frequently than they did before the pandemic? (n=583)

77% Yes, employees will spend fewer days in the office
3% Yes, employees will work entirely remotely
12% No, employees will come into the office the same number of days before the pandemic
8% Don’t know

How will this impact domestic business travel?

61% There will be less domestic business travel
27% There will be about the same amount of business travel
6% There will be more domestic business travel
6% Don’t know

Q. You mentioned you expect employees will come to the office fewer days than they did before the pandemic. How do you think employee domestic business travel will change as a result of spending fewer days? Note: Only displayed to those who indicated employees will spend fewer days in the office, or work entirely remotely. (n=467)
Even as Business Travel Resumes, Virtual Meetings Will Be More Common Than Before the Pandemic

How will business travel at your company resume as the world recovers from COVID-19?

<table>
<thead>
<tr>
<th>Event</th>
<th>Significantly lower than 2019</th>
<th>Lower than 2019 (decline of 50% or less)</th>
<th>About the same</th>
<th>Significantly more than 2019 (up to 50% more)</th>
<th>Significantly more than 2019 (50% or more)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual internal staff meetings</td>
<td>6%</td>
<td>12%</td>
<td>18%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Virtual sales calls with prospective clients</td>
<td>4%</td>
<td>13%</td>
<td>19%</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>Virtual sales calls with current customers or clients</td>
<td>3%</td>
<td>14%</td>
<td>19%</td>
<td>41%</td>
<td>22%</td>
</tr>
<tr>
<td>Virtual non-sales calls with customers or clients</td>
<td>5%</td>
<td>17%</td>
<td>18%</td>
<td>37%</td>
<td>24%</td>
</tr>
<tr>
<td>Face-to-face offsite sales visits to prospective customers or clients</td>
<td>16%</td>
<td>46%</td>
<td>27%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Face-to-face offsite sales visits to current customers or clients</td>
<td>15%</td>
<td>52%</td>
<td>22%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Face-to-face non-sales customer or client meetings</td>
<td>22%</td>
<td>50%</td>
<td>18%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Q. How do you think business travel will resume at your company as the world recovers from COVID-19? (n=576-580)
## Business Travel Still Grounded…

<table>
<thead>
<tr>
<th>Country/Country Cluster</th>
<th>Percentage of Companies Canceled or Suspended</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>92%</td>
<td>Most (22%) or all (70%) trips to China</td>
</tr>
<tr>
<td>Japan, S. Korea, Singapore, Malaysia</td>
<td>92%</td>
<td>Most (30%) or all (63%) trips to other APAC countries</td>
</tr>
<tr>
<td>Latin America</td>
<td>90%</td>
<td>Most (28%) or all (62%) trips to Latin America</td>
</tr>
<tr>
<td>Canada</td>
<td>87%</td>
<td>Most (29%) or all (59%) trips to Canada</td>
</tr>
<tr>
<td>United States</td>
<td>75%</td>
<td>Most (41%) or all (56%) trips to the United States</td>
</tr>
<tr>
<td>Domestic travel within their own country</td>
<td>69%</td>
<td>Most (49%) or all (20%) domestic travel within their own country</td>
</tr>
<tr>
<td>European countries</td>
<td>90%</td>
<td>Most (36%) or all (53%) trips to European countries</td>
</tr>
<tr>
<td>Latin America</td>
<td>90%</td>
<td>Most (28%) or all (62%) trips to Latin America</td>
</tr>
</tbody>
</table>

Q. Thinking about your company, how has the coronavirus impacted business travel to…? (n=306-477)
More Than One-Quarter of Companies (28%) Plan to Resume Domestic Business Travel in the Near Future

Are companies planning to resume travel to...?

<table>
<thead>
<tr>
<th>Region</th>
<th>Do not plan to resume travel in near future</th>
<th>Have considered resuming travel in near future, but no definite plans</th>
<th>Plan to resume travel in near future (1-3 months)</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>12%</td>
<td>51%</td>
<td>28%</td>
<td>10%</td>
</tr>
<tr>
<td>United States</td>
<td>18%</td>
<td>53%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>Canada</td>
<td>20%</td>
<td>53%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Europe</td>
<td>23%</td>
<td>52%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>All international</td>
<td>25%</td>
<td>56%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Latin America</td>
<td>30%</td>
<td>50%</td>
<td>5%</td>
<td>16%</td>
</tr>
<tr>
<td>Other Asia Pacific</td>
<td>30%</td>
<td>47%</td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>Middle East</td>
<td>31%</td>
<td>48%</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>China</td>
<td>36%</td>
<td>46%</td>
<td>4%</td>
<td>14%</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=253-362)