

Coronavirus Poll Results

July 16, 2020

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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

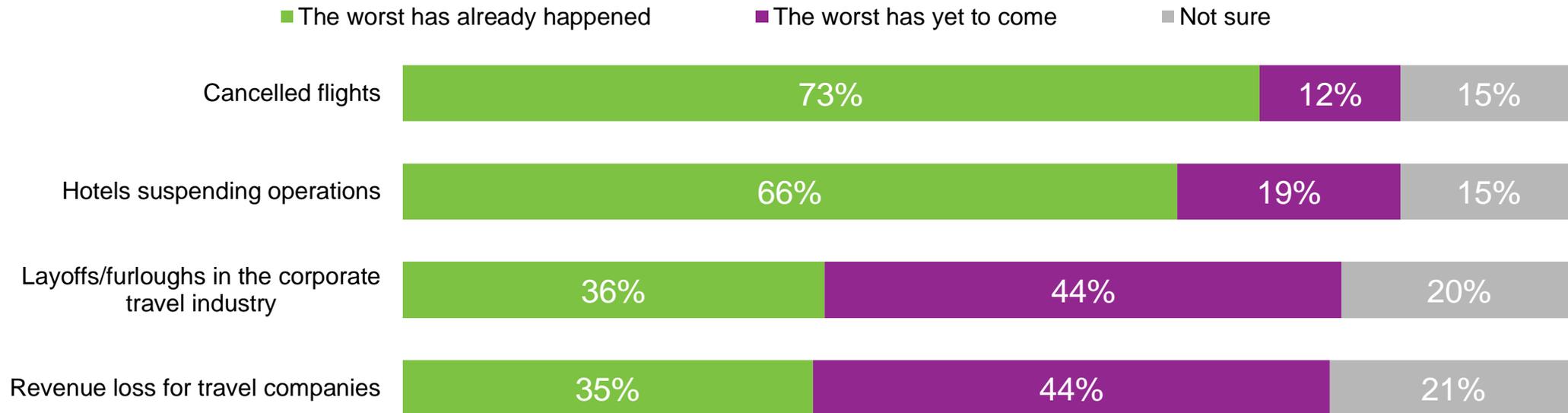
- Fielding took place from July 7 through July 13, 2020
- An email invitation was sent to 16,626 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 2,167 companies responded to the poll
- Note: Some totals might not add to 100% because of rounding; each percentage is rounded to the nearest whole number

Key Highlights



Has the Worst Already Happened? Travel Professionals Are Split

When thinking about the following, which best describes your view?



Q. When thinking about the following, which best describes your view? (n=1,462-1,471)

For Suppliers, Pessimism Returns...

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



8%

are **more optimistic** than last week



47%

feel the same as last week



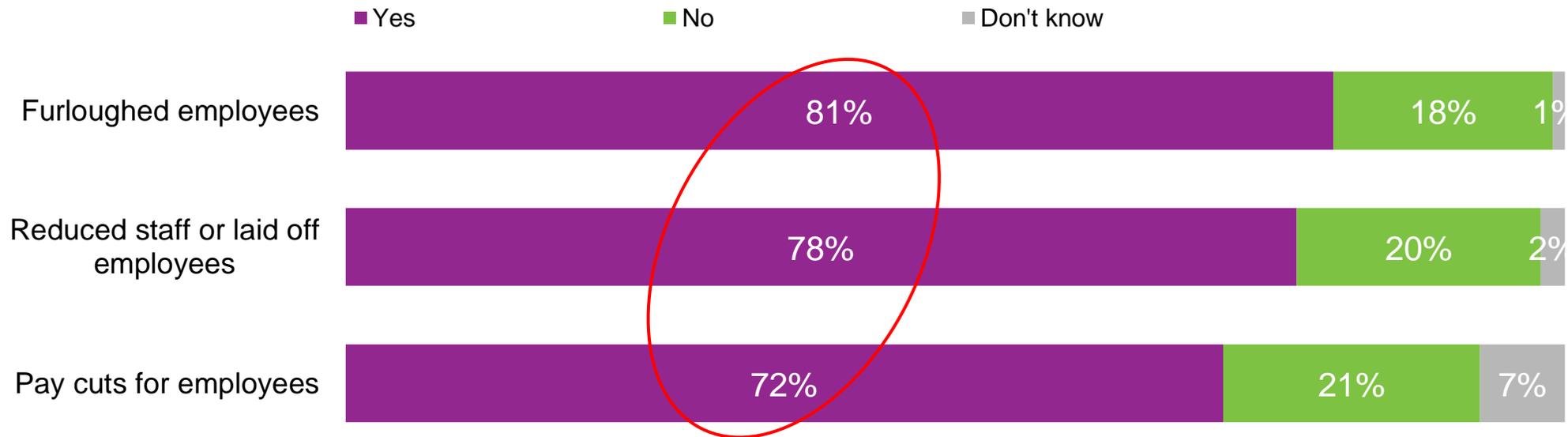
44%

are **more pessimistic** than last week

Note: Question only displayed to travel suppliers/TMCs

Travel Companies Feel the Pain

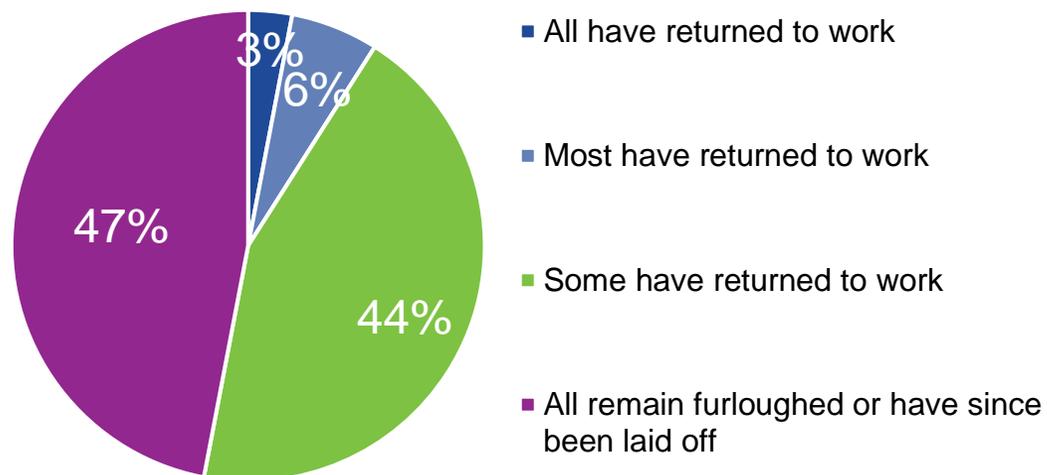
Has your company taken the following actions as a result of the coronavirus?



Results filtered for suppliers/TMCs

Some 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=485)

Business Travel's Recovery Has Taken Longer Than Originally Expected

Thinking about your expectations during the early months of the pandemic (e.g., March 2020), would you say that...?

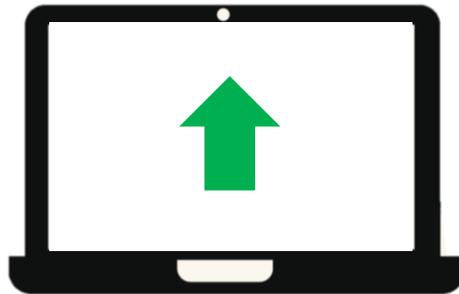


n=1,661

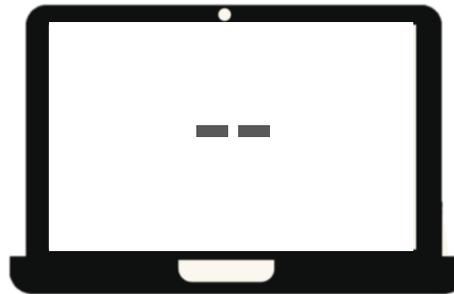


After Signs of Recovery, Bookings Stall...

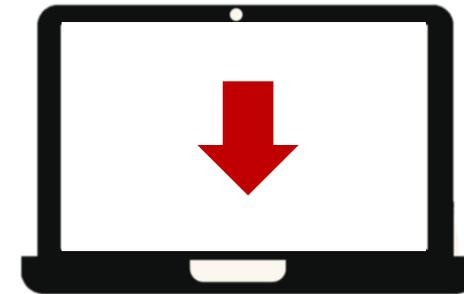
How have bookings from corporate customers changed in the past week?



29% Our bookings have increased



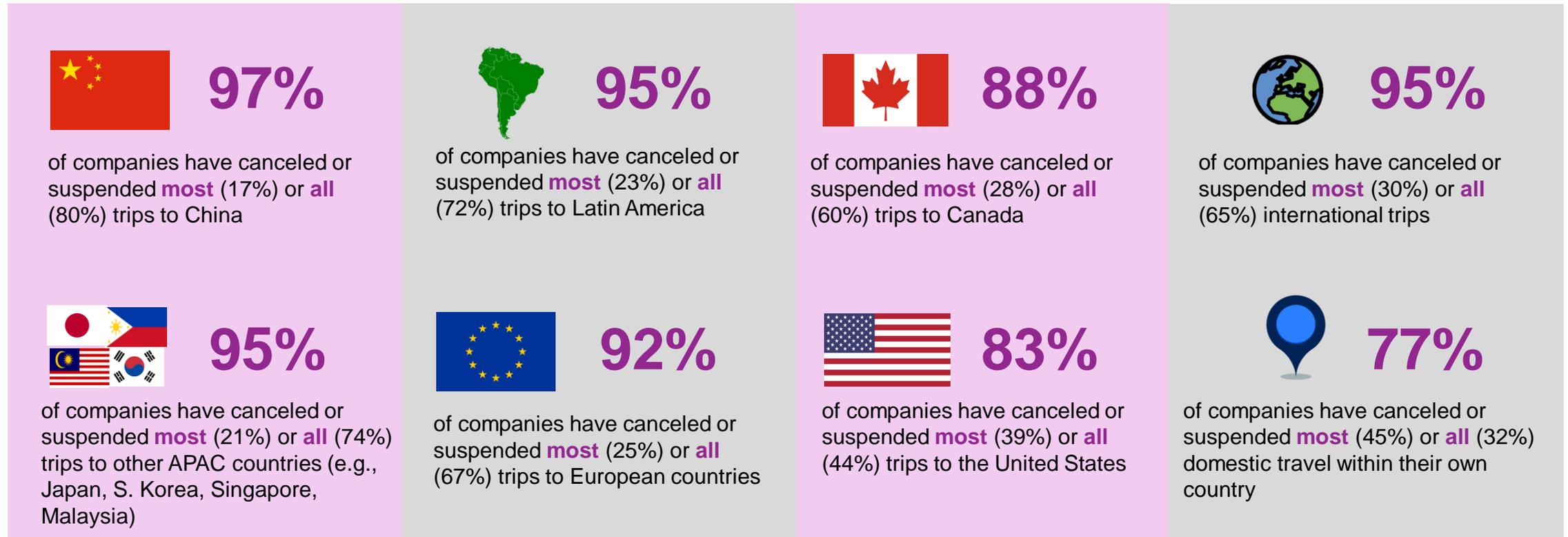
37% Our bookings have remained the same



35% Our bookings have decreased

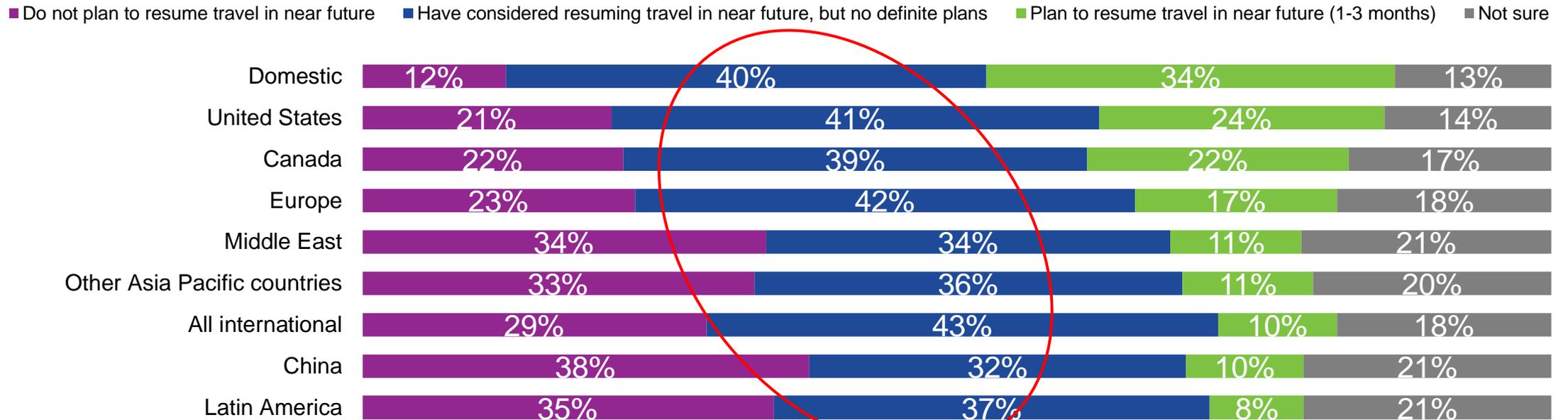
Note: Question only displayed to respondents who work for an airline, hotel chain, hotel property, TMC, or ground transportation company

Business Travel Still Grounded...



Despite Rising Infections, Companies Still Consider Resuming Travel

Are Companies Planning to Resume Travel to...?



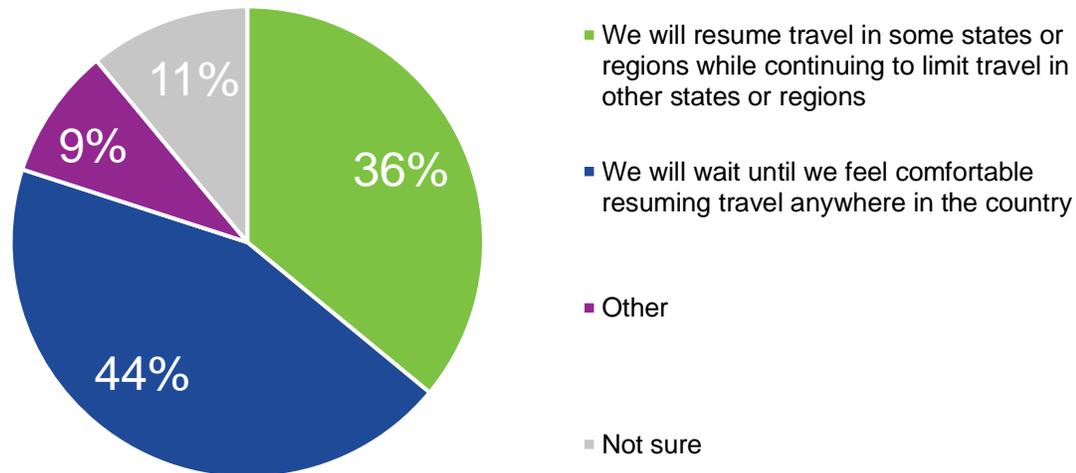
Q. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

Note: Respondents only asked about countries/regions where they indicated their company has canceled or suspended most or all business travel (n=715-1,043)

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

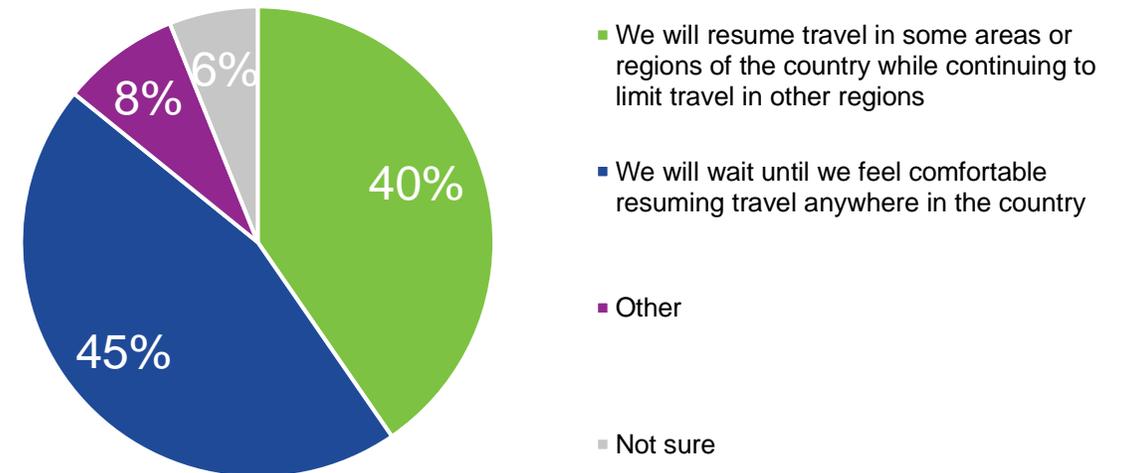
How will companies resume domestic travel?

-U.S.-based travel managers/procurement professionals



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 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=360)

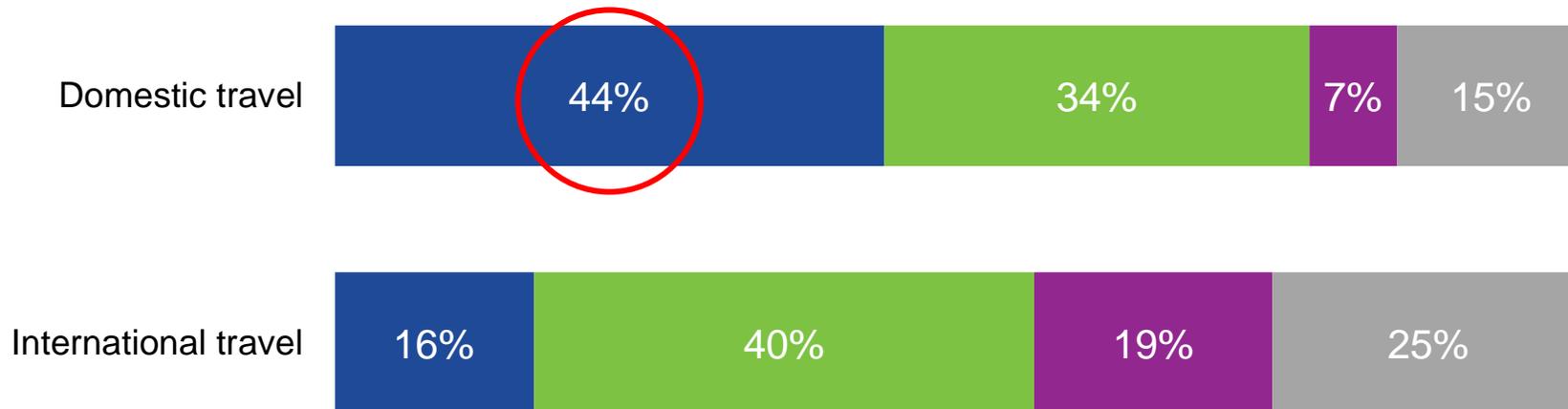
Q. You mentioned your company has limited most or all domestic travel within your country. When your company decides to resume travel, which will most likely be your approach?

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=141)

What's the Timeline?

Will travel resume within...?

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



Many 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...?

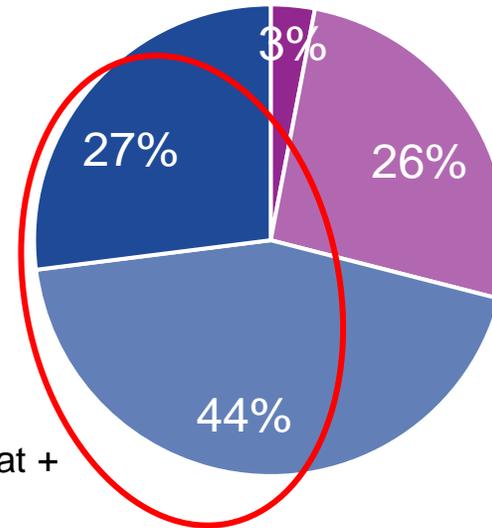
Note: Question only displayed to respondents who said their company has cancelled at least "a few" domestic or international trips as a result of the coronavirus (n=1,203-1,271)

Most Companies Revise Travel Policy



70%
somewhat +
a lot

How much has the policy changed?



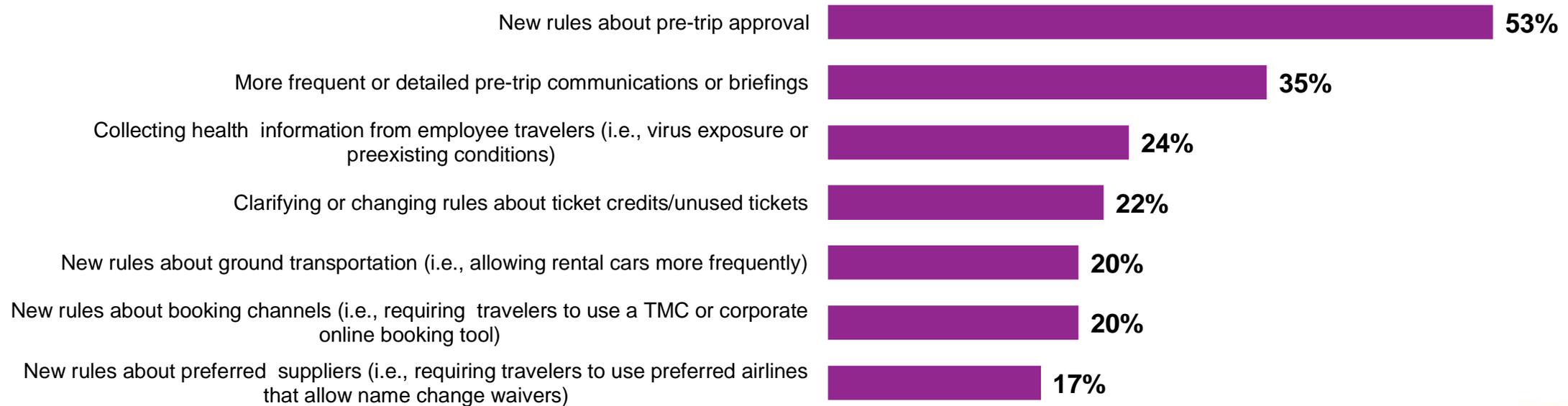
- It has barely changed at all
- It has changed a little
- It has changed somewhat
- It has changed a lot

Q. Has your company revised its travel policy as a result of the coronavirus pandemic? **Note:** Only displayed travel buyers or procurement professionals (n=704)

Q. You mentioned your company has revised its travel policy as a result of the pandemic. Thinking about your travel policy today, how much has it changed since January, 2020? **Note:** Only displayed travel buyers or procurement professionals who indicated their company changed its travel policy as a result of the pandemic (n=392)

How Have Travel Policies/Processes Changed?

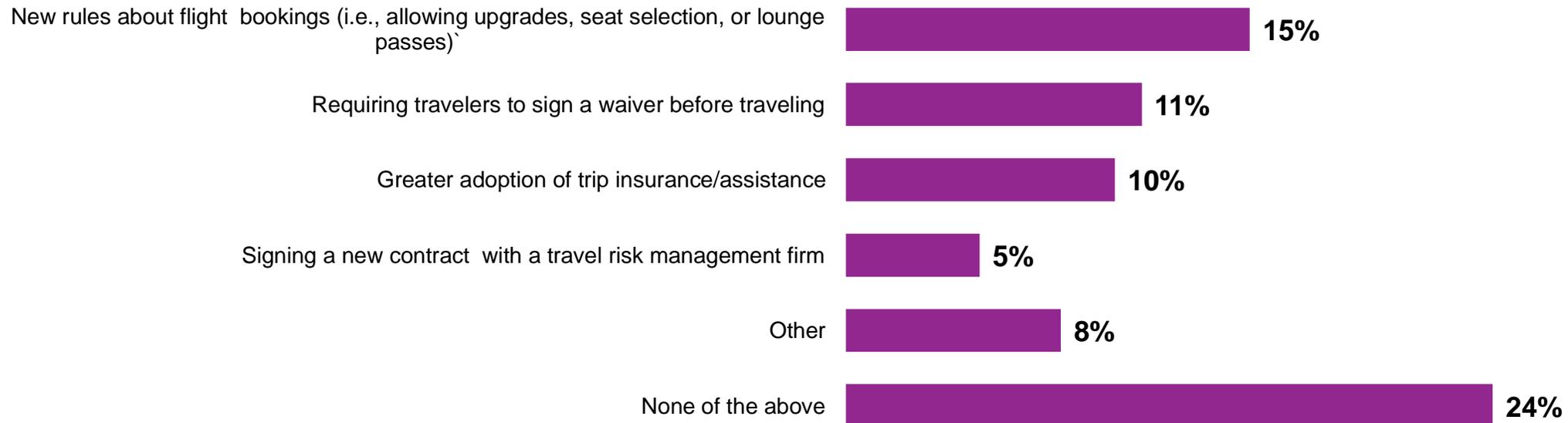
Changes Made as a Result of the Pandemic



Q. Thinking about your company's travel program, which of the following changes has it made as a result of the pandemic? Please select all that apply. (n=1,472)

How Have Travel Policies/Processes Changed? (Cont.)

Changes Made as a Result of the Pandemic



Q. Thinking about your company's travel program, which of the following changes has it made as a result of the pandemic? Please select all that apply. (n=1,472)