

Coronavirus Poll Results

September 24, 2020

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 September 8 through September 18, 2020
- An email invitation was sent to 16,327 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, 1,383 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

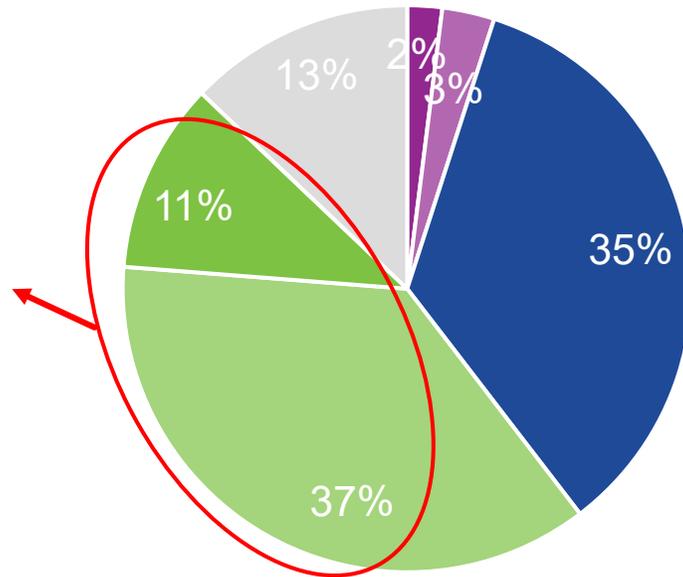


The Coronavirus Underscores the Importance of Managed Corporate Travel

Has the coronavirus changed how senior leaders view the managed travel program?

48%

of Travel Managers say senior leaders at their company **value the managed travel program more** than they did before the pandemic



- Senior leaders value our managed travel program much less than they did before the coronavirus pandemic
- Senior leaders value our managed travel program less than they did before the coronavirus pandemic
- Senior leaders value our managed travel program about the same as they did before the coronavirus pandemic
- Senior leaders value our managed travel program more than they did before the coronavirus pandemic
- Senior leaders value our managed travel program much more than they did before the coronavirus pandemic
- Not sure

Q. In your opinion, how has the coronavirus pandemic changed how senior leaders at your organization view the managed travel program that you have in place at your company?

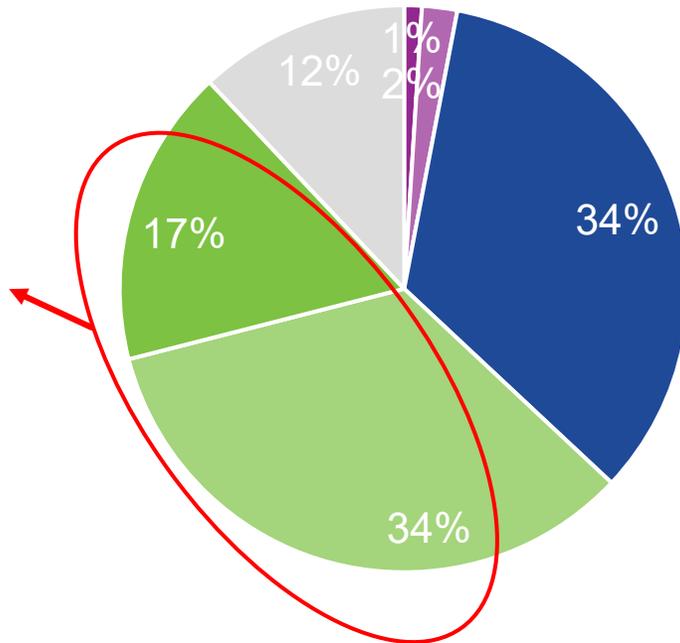
Note: Question only displayed to travel managers/procurement professionals. (n=463)

The Coronavirus Underscores the Importance of Managed Corporate Travel

Has the coronavirus changed how other stakeholders view the managed travel program?

51%

of Travel Managers say other stakeholders at their company **value the managed travel program more** than they did before the pandemic



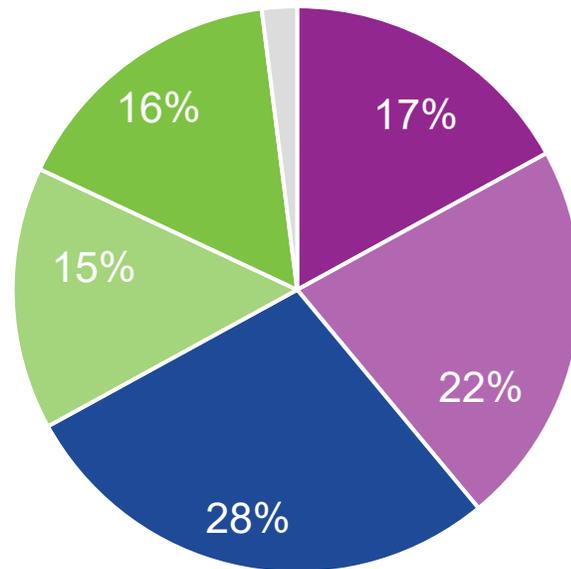
- Other stakeholders value our managed travel program much less than they did before the coronavirus pandemic
- Other stakeholders value our managed travel program less than they did before the coronavirus pandemic
- Other stakeholders value our managed travel program about the same as they did before the coronavirus pandemic
- Other stakeholders value our managed travel program more than they did before the coronavirus pandemic
- Other stakeholders value our managed travel program much more than they did before the coronavirus pandemic
- Not sure

Q. In your opinion, how has the coronavirus pandemic changed how other stakeholders at your organization view the managed travel program that you have in place at your company?

Note: Question only displayed to travel managers/procurement professionals. (n=461)

Business Travel Remains Largely at a Standstill – But Many Travel Managers Have Kept Busy

Are Travel Managers busy during COVID-19?



- I am much less busy than I was before the pandemic began
- I am somewhat less busy than I was before the pandemic began
- I am equally busy as I was before the pandemic began
- I am somewhat busier than I was before the pandemic began
- I am much busier than I was before the pandemic began
- Not sure

Q. You mentioned you are a travel buyer or procurement official. Thinking about your role in the COVID-19 environment, would you say...?

Note: Question only displayed to travel managers/procurement officials. (n=459)

With an Effective Vaccine or Public Health Measures, Many Travel Managers Expect Their Company's Travel Volume Will Fully Recover Within 3 Years

Post-Covid, how will the number of business trips change?

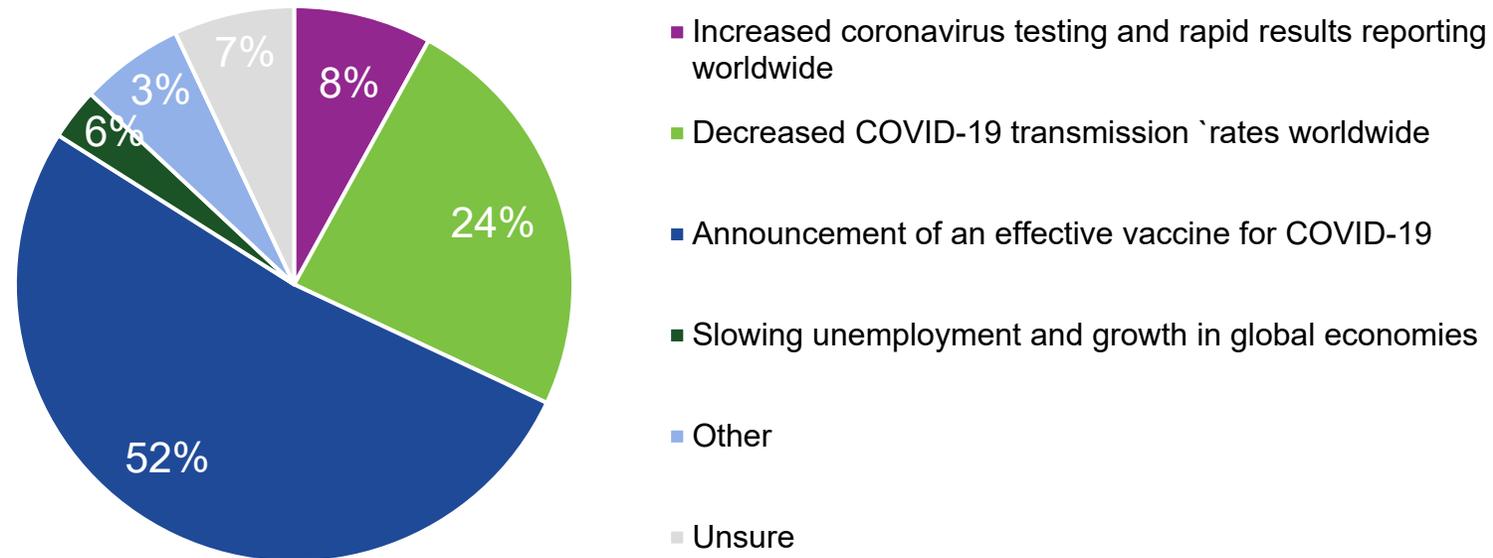


Note: 16% indicated “not sure”

n=520

Will Vaccine News Spark an Uptick in Business Travel?

As your company considers business travel plans in 2021, what would have the most influence on your planning process?



Q. As your company considers business travel plans in 2021, what would have the most influence on your planning process? Select one. (n=922)

Supplier Optimism Remains Muted

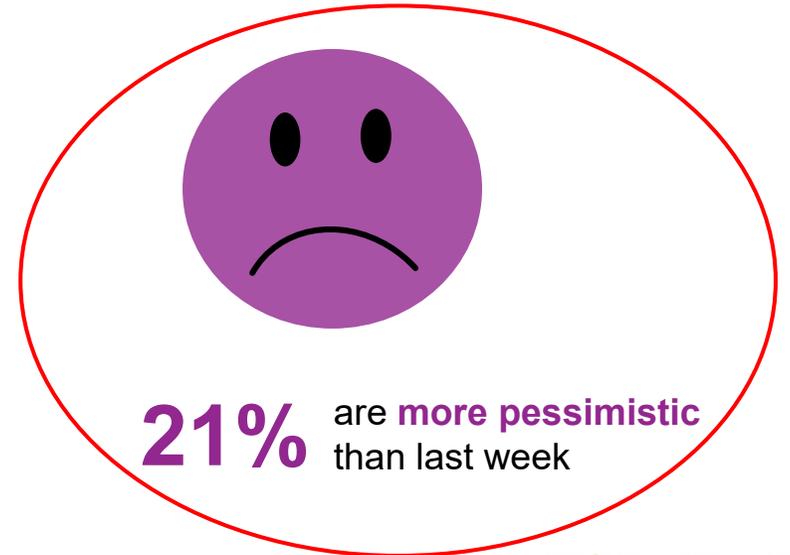
How do suppliers feel about the corporate travel industry's path to recovery?



15% are **more optimistic** than last week



64% feel the same as last week



21% are **more pessimistic** than last week

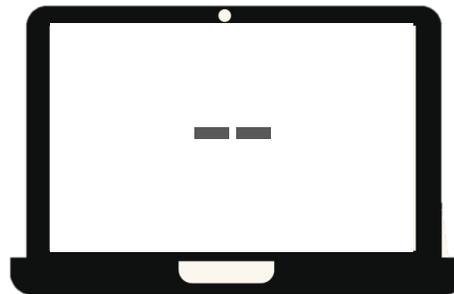
Note: Question only displayed to travel suppliers/TMCs

Bookings Pick Up for Some Suppliers – But Not Others

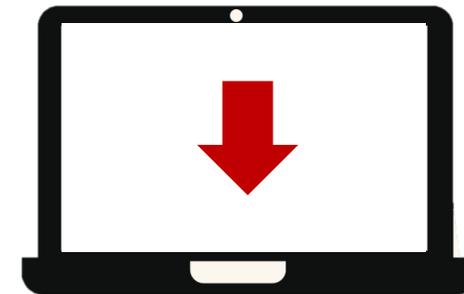
How have bookings from corporate customers changed in the past week?



29% Our bookings have increased



54% Our bookings have remained the same



17% 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...



95%

of companies have canceled or suspended **most** (22%) or **all** (73%) trips to China



92%

of companies have canceled or suspended **most** (29%) or **all** (63%) trips to Latin America



87%

of companies have canceled or suspended **most** (32%) or **all** (55%) trips to Canada



92%

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



95%

of companies have canceled or suspended **most** (27%) or **all** (68%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



88%

of companies have canceled or suspended **most** (34%) or **all** (54%) trips to European countries



81%

of companies have canceled or suspended **most** (42%) or **all** (38%) trips to the United States

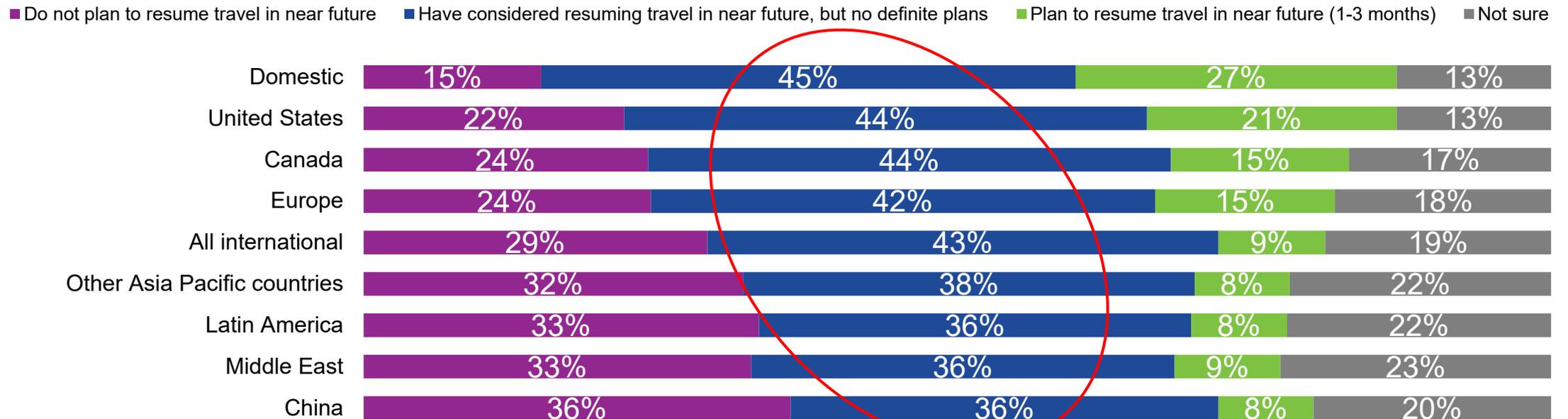


70%

of companies have canceled or suspended **most** (46%) or **all** (24%) domestic travel within their own country

Companies 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=484-675)

What's the Timeline?

Will travel resume within...?

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



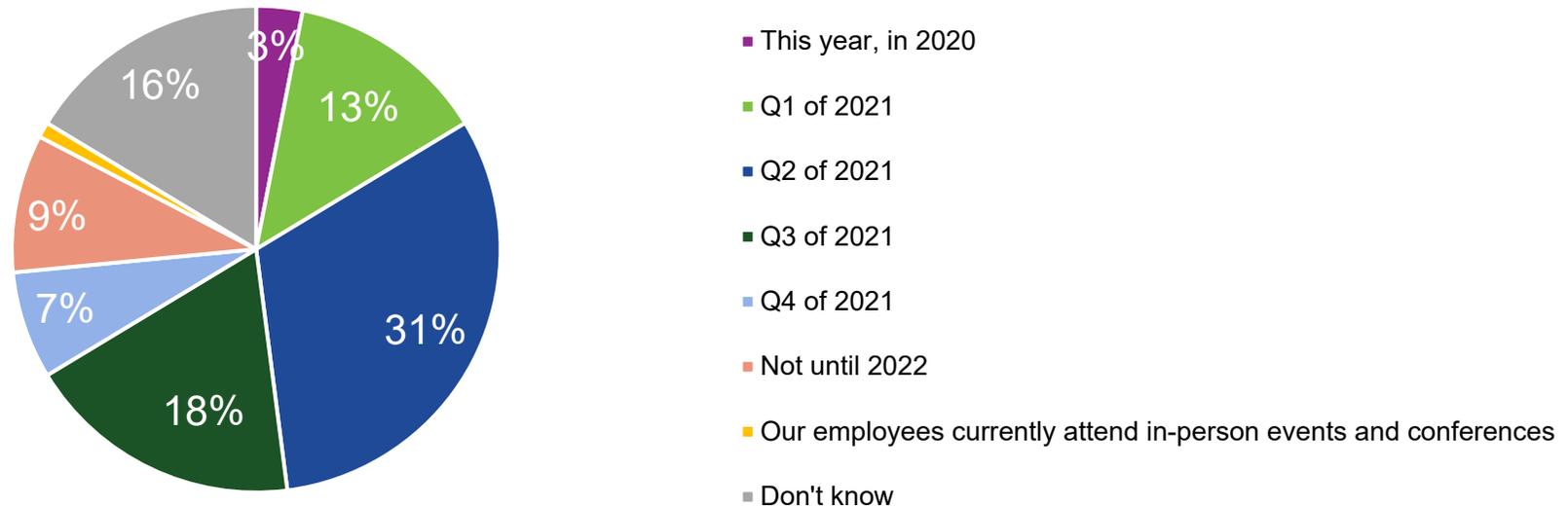
Many companies expect to resume **domestic travel** within 2-3 months. However, **international travel** may take longer

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=779-807)

Many Travel Professionals Expect In-Person Meetings to Return by Q2 of 2021

When will employees attend in-person meetings again?



Q. When do you think employees at your company will attend in-person events and conferences? Select one. (n=953)