

Coronavirus Poll Results

November 19, 2020

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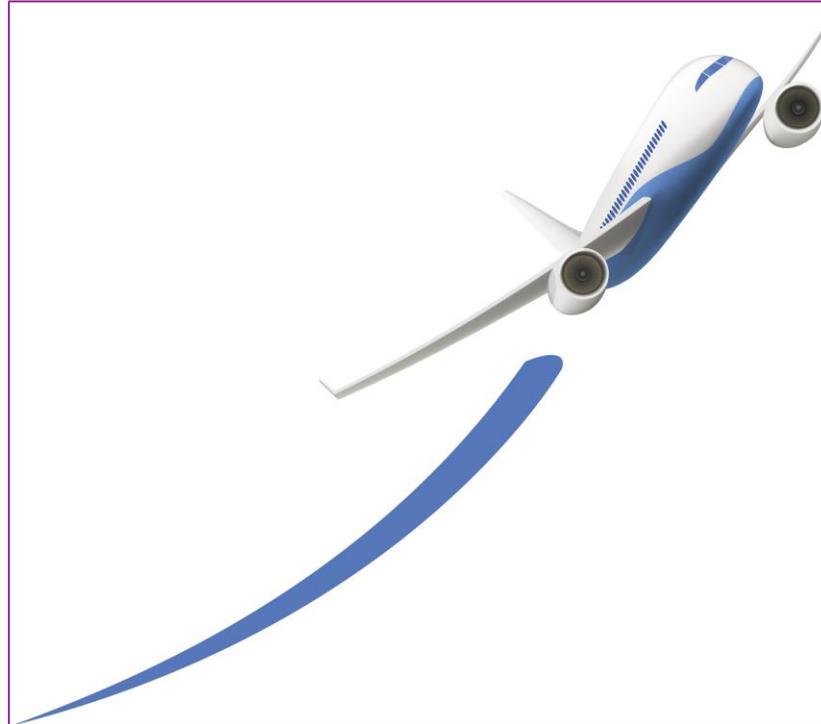


Methodology

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

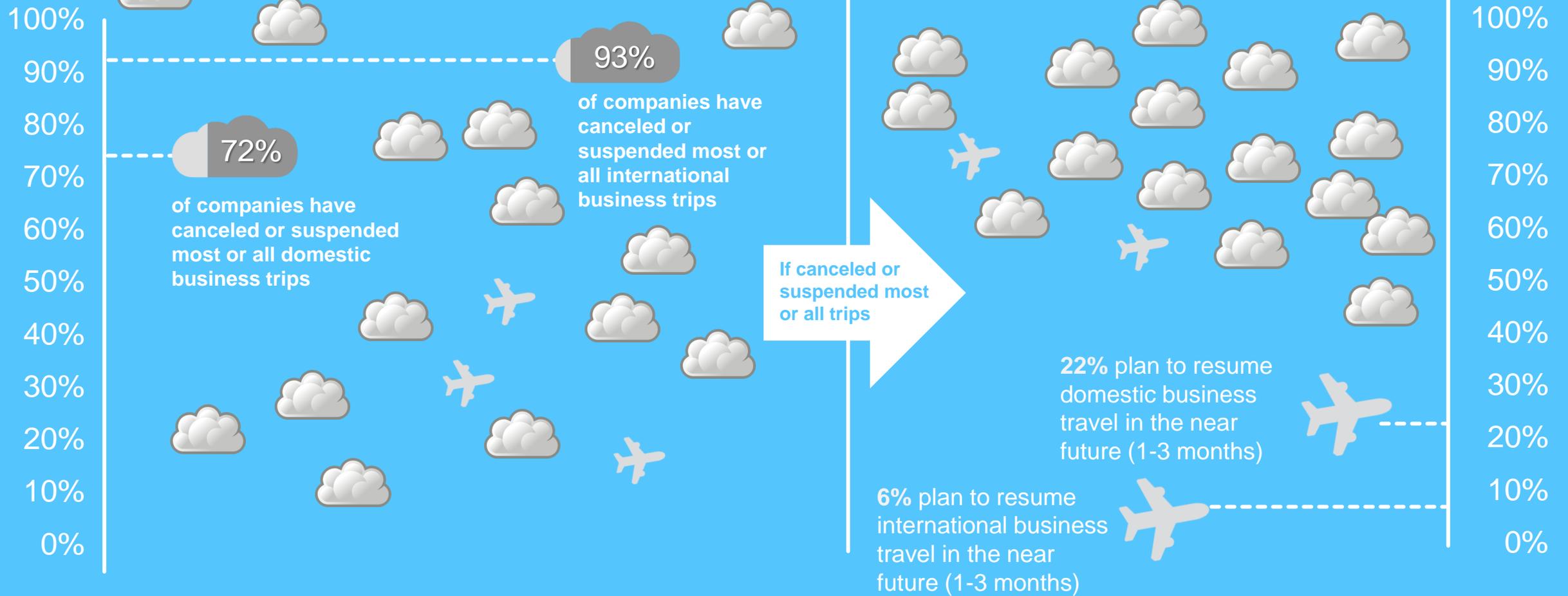
- Fielding took place from November 9 through November 16, 2020
- An email invitation was sent to 16,177 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 822 companies 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



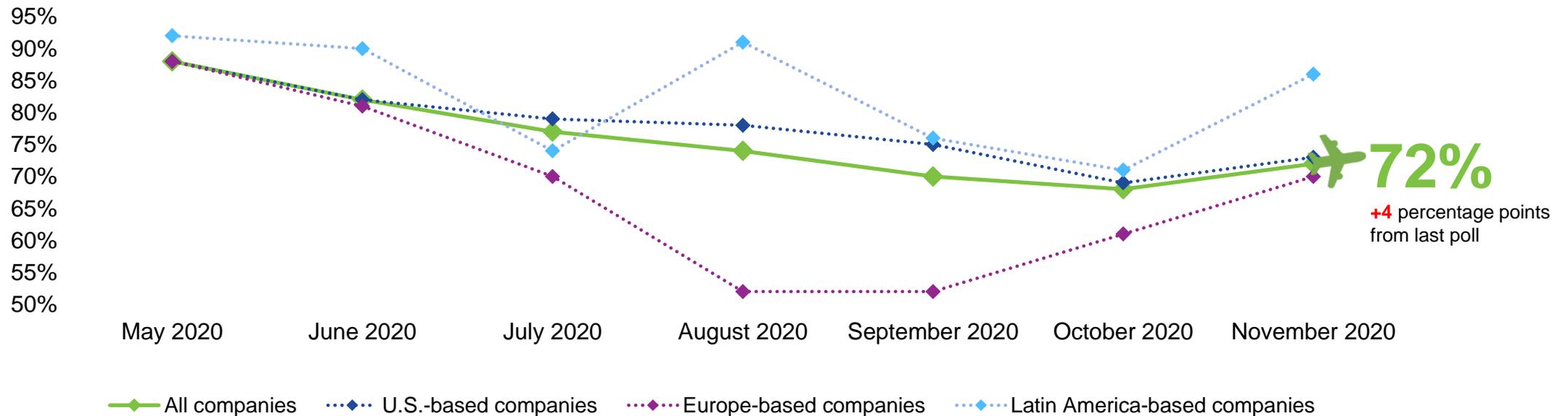
The State of Business Travel

November 2020



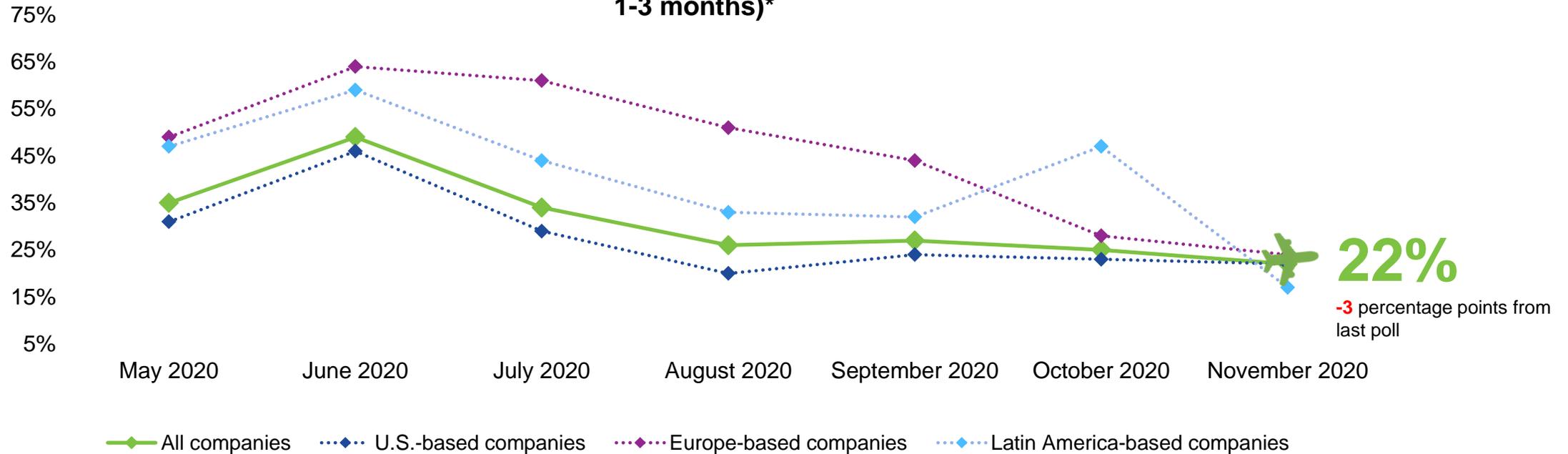
The State of Domestic Business Travel

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



The State of Domestic Business Travel (Cont.)

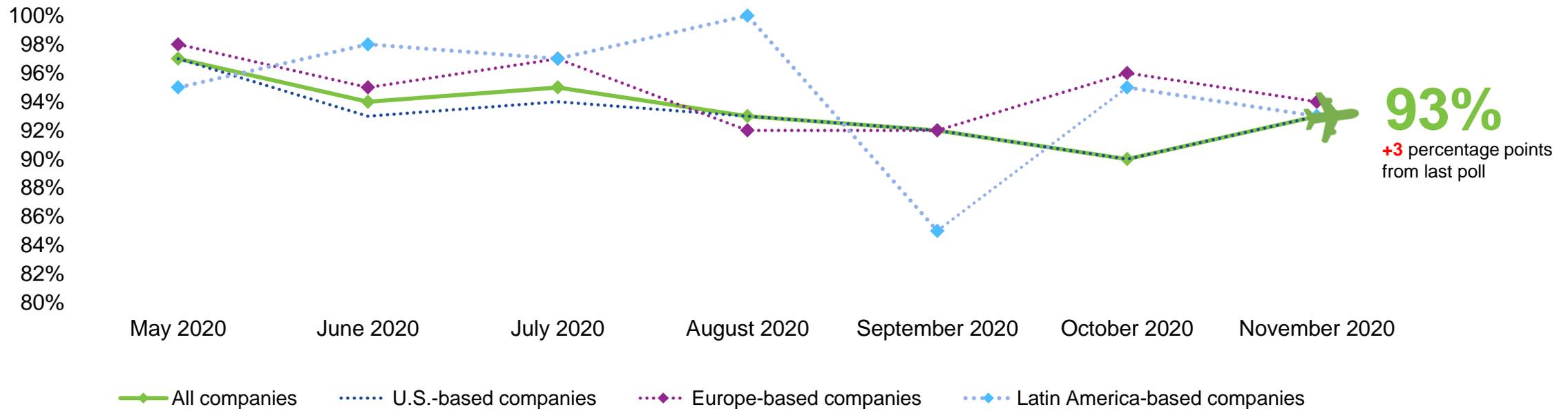
% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*



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

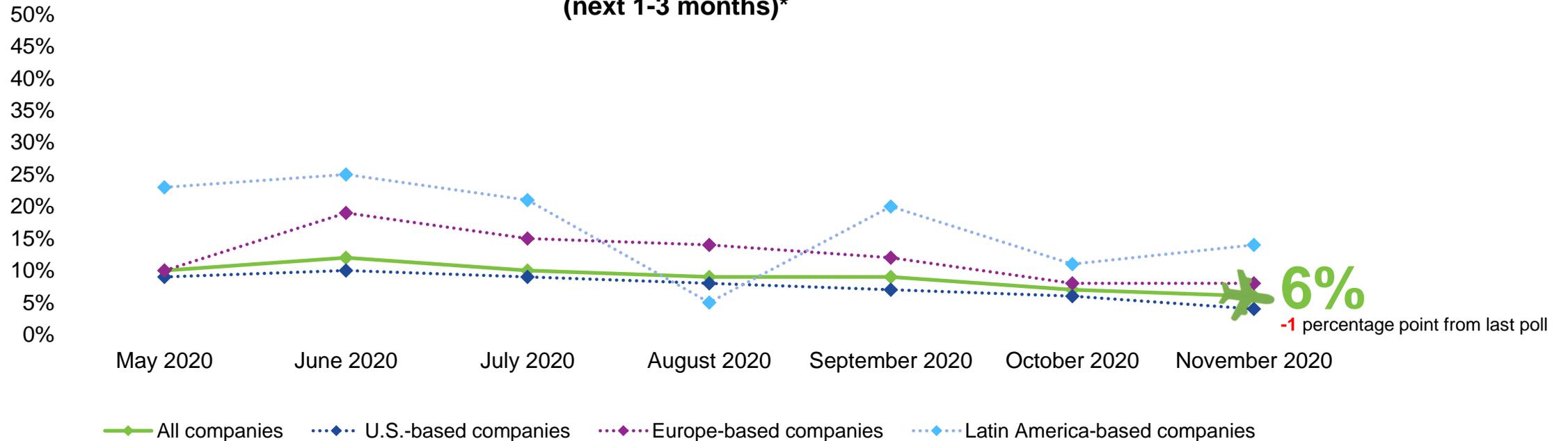
The State of International Business Travel

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



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?

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



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=376)

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?

■ Very pessimistic ■ Pessimistic ■ Neither pessimistic nor optimistic ■ Optimistic ■ Very optimistic ■ Not sure



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=332)**

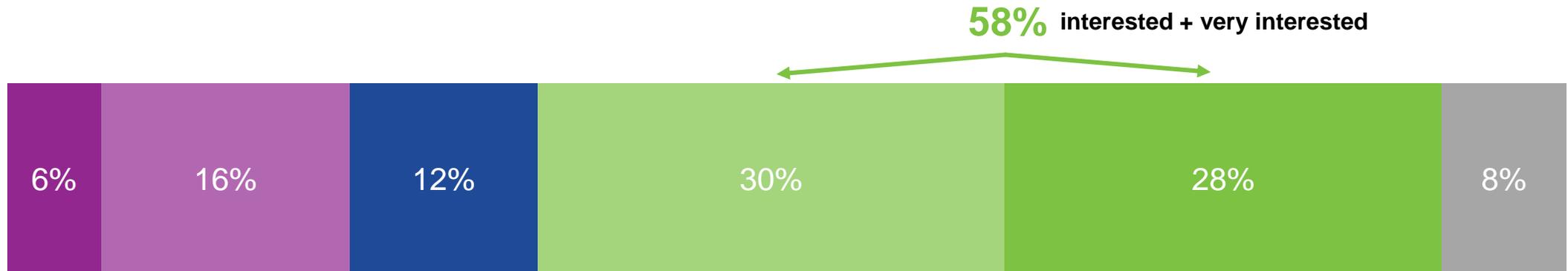
Key Highlights



Most Respondents Support Exempting Some Business Trips From Mandatory Quarantines

Are respondents interested in quarantine exemptions for some international business trips?

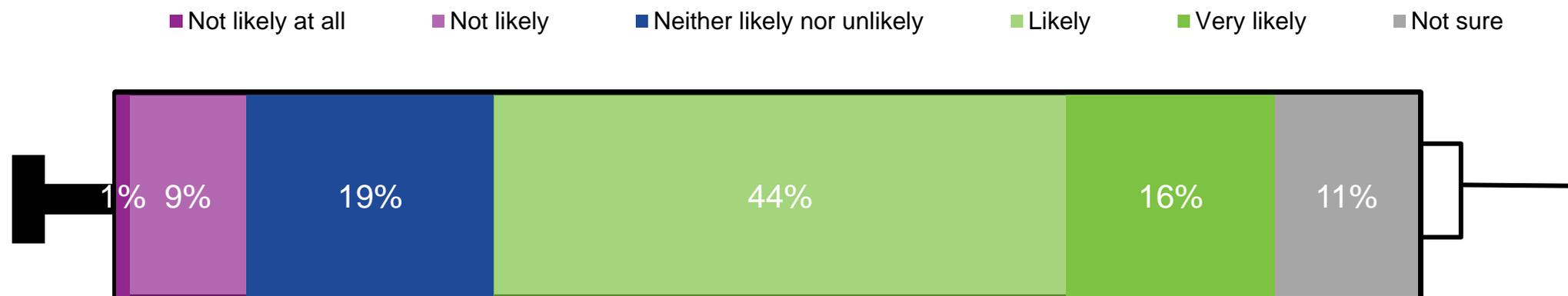
■ Not interested at all ■ Not interested ■ Neither interested nor uninterested ■ Interested ■ Very interested ■ Not sure



Q. As a result of the coronavirus, many countries have implemented mandatory quarantines for international travelers. Under these policies, travelers must isolate for a certain period upon arriving at their destination. Some advocates have proposed making an exception for short-duration business trips that involve meeting with only a few people. In such cases, business travelers would not need to quarantine even if leisure travelers would still need to. Please rate your interest in seeing this proposal adopted. (n=765)

With Positive Vaccine News, Many Travel Managers Expect to Allow Business Travel and In-Person Meetings at Some Point Next Year

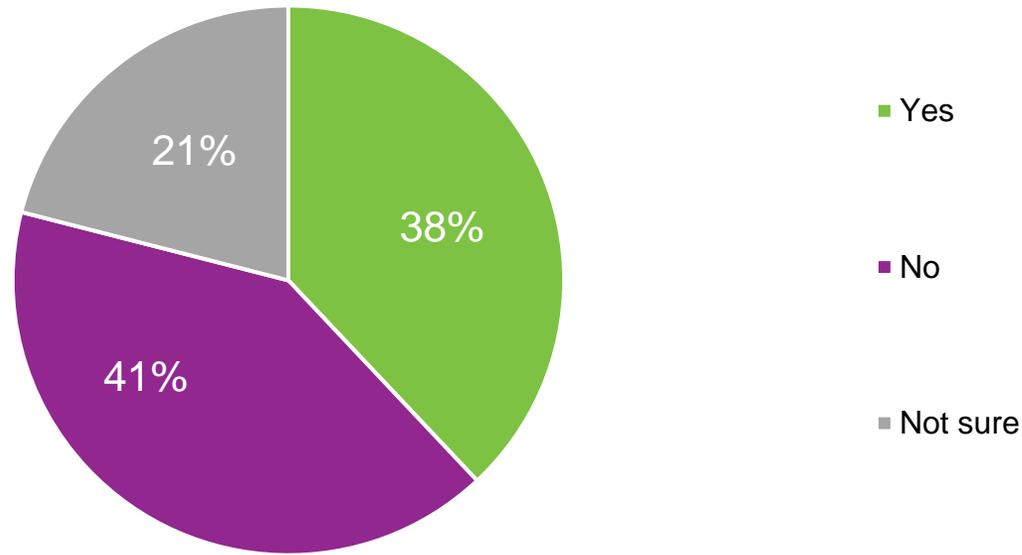
Based on recent vaccine news, are travel programs more likely to allow business travel and in-person meetings in 2021?



Q. Based on the recent announcement of a possible vaccine that indicates a 90% efficacy rate in clinical trials, do you believe your company will be more likely to allow business travel and employees to attend in-person meetings in 2021? (n=378)

Many Travel Programs Have Conducted Continuity Planning to Ensure Uninterrupted Service From Suppliers

Have travel programs conducted supplier continuity planning?



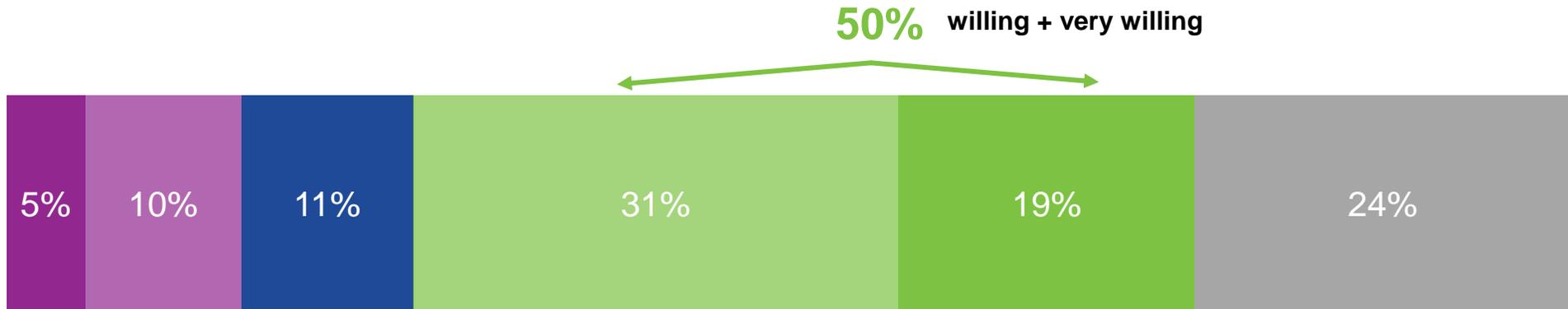
Q. Has your company conducted “business continuity” planning with respect to your travel programme? **These exercises involve planning for the possibility that a key supplier goes bankrupt or merges with another company.**

Note: Question only displayed to travel managers/procurement professionals (n=362)

Some Travel Programs Would Encourage Employees to Download a Contact Tracing Mobile App

Are travel programs willing to implement a policy encouraging employees to download a contact tracing mobile app?

■ Not willing at all ■ Not willing ■ Neither willing nor unwilling ■ Willing ■ Very willing ■ Not sure



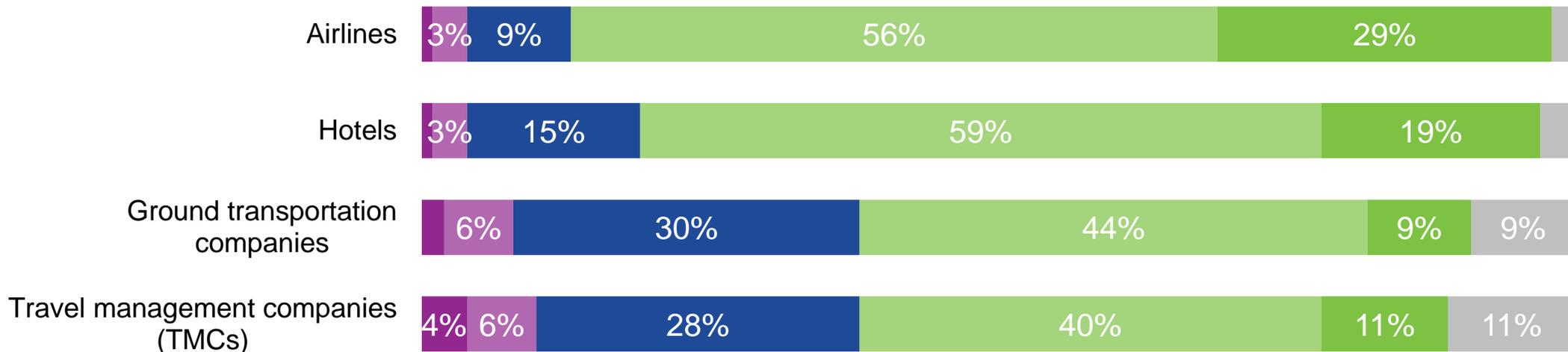
Q. How willing would your company be to implement a policy that encourages employees download an app that would track and trace business travelers to assist in contact tracing efforts?

Note: Question only displayed to travel managers/procurement professionals (n=348)

Have Supplier Communication Campaigns Been Effective?

Have supplier COVID-related communication campaigns been effective?

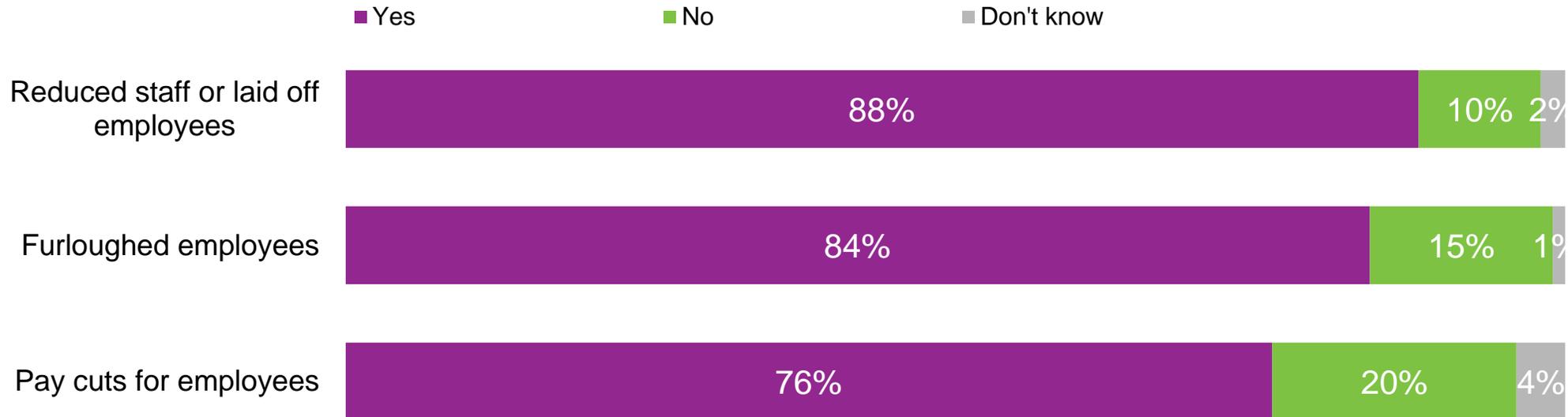
■ Not effective at all
 ■ Not effective
 ■ Neither effective nor ineffective
 ■ Effective
 ■ Very effective
 ■ Not sure



Q. Travel suppliers have launched communication campaigns to educate customers about the changes they are making as a result of the coronavirus. These include service changes (e.g., flight reductions), policy changes (e.g., eliminating change fees) and new sanitation practices. Thinking about each of the following types of suppliers, how effective do you think these campaigns have been? **Note: Question only displayed to travel managers/procurement professionals (n=349-350)**

Most Travel Companies Have Implemented Layoffs, Furloughs, and Pay Cuts

Have companies taken the following actions as a result of the coronavirus?



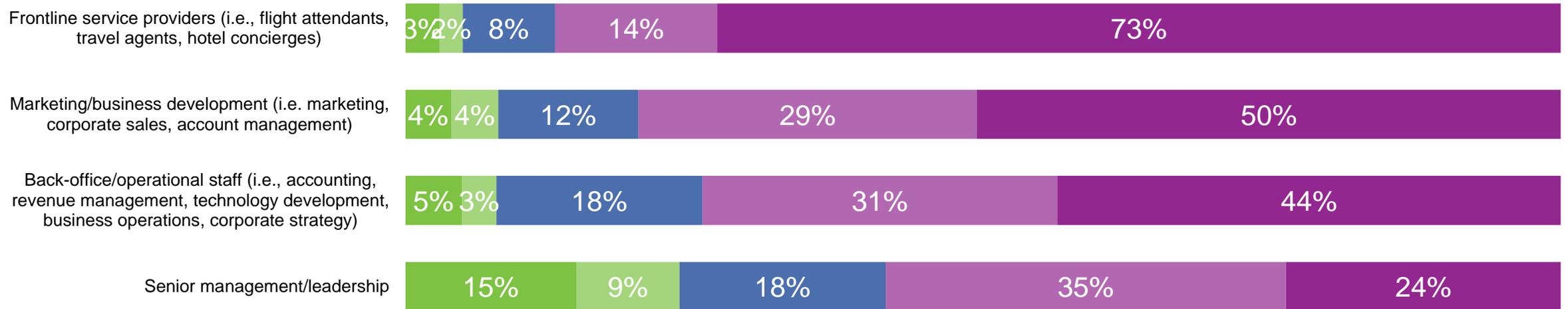
Results filtered for suppliers/TMCs



For Travel Suppliers, Staff Reductions Have Hit Different Types of Employees

To what extent have different types of employees been affected by layoffs/furloughs?

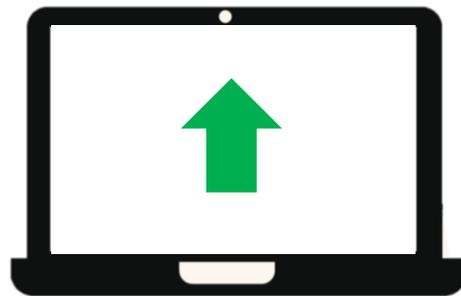
■ Not affected at all
 ■ Barely affected
 ■ Somewhat affected
 ■ Moderately affected
 ■ Greatly affected



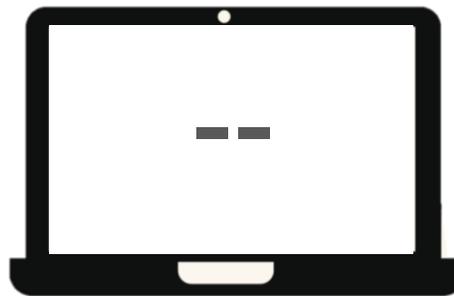
Q. You mentioned your company has furloughed or laid off employees as a result of the coronavirus. To what extent have each of the following types of employees been affected? **Note: Question only displayed to travel supplier/TMC employees who indicated their company has laid off or furloughed employees as a result of the coronavirus, Some respondents indicated “not sure”; these were excluded from the calculations. (n=273-291)**

A Decent Number of Suppliers Have Seen Corporate Bookings Decline

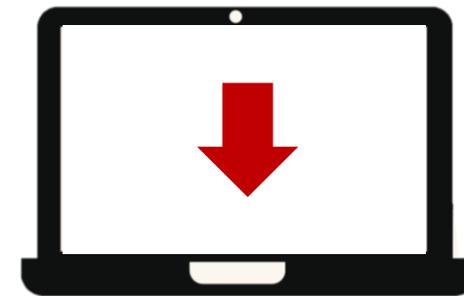
How have bookings from corporate customers changed in the past week?



16% Our bookings have increased



50% Our bookings have remained the same



34% 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...



94%

of companies have canceled or suspended **most** (26%) or **all** (68%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



91%

of companies have canceled or suspended **most** (31%) or **all** (60%) trips to Latin America



86%

of companies have canceled or suspended **most** (30%) or **all** (56%) trips to Canada



93%

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



92%

of companies have canceled or suspended **most** (20%) or **all** (72%) trips to China



89%

of companies have canceled or suspended **most** (34%) or **all** (55%) trips to European countries



79%

of companies have canceled or suspended **most** (44%) or **all** (35%) trips to the United States



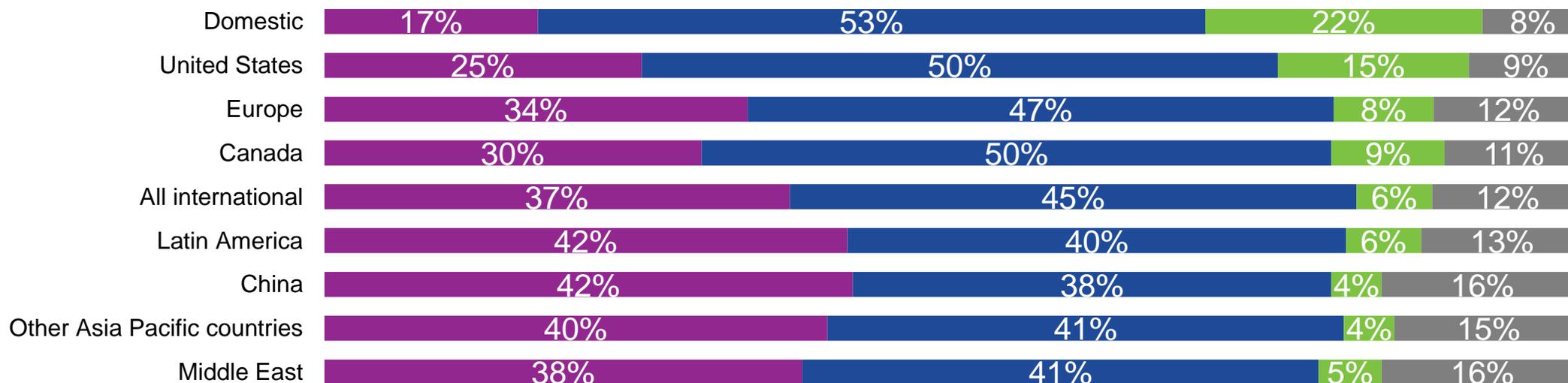
72%

of companies have canceled or suspended **most** (50%) or **all** (22%) domestic travel within their own country

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

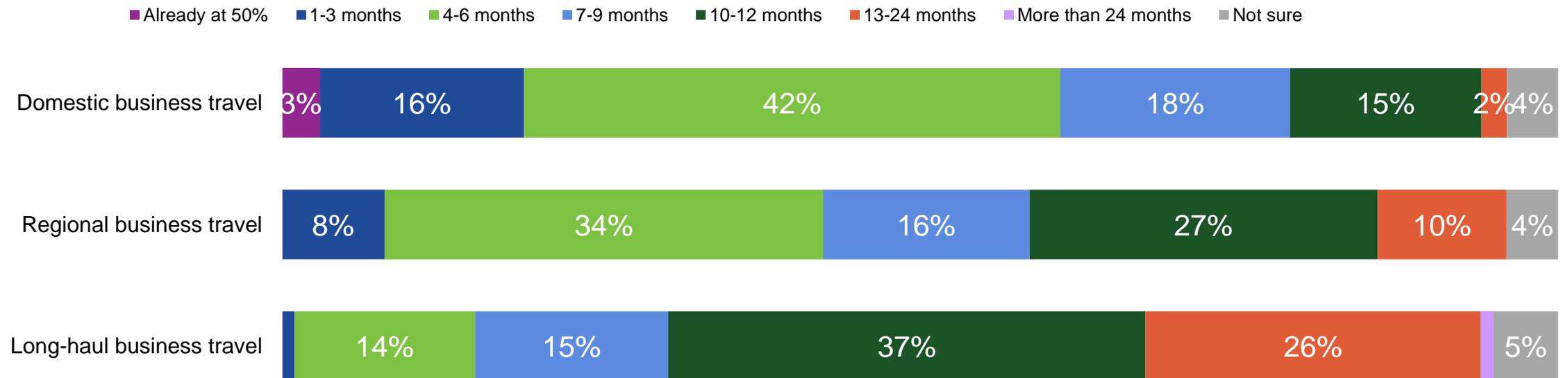


Q. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

Note: Respondents only asked about countries/regions where they indicated their company has canceled or suspended most or all business travel (n=286-428)

Most European Companies Expect to Return to 50% of Pre-COVID Trip Volume Within the Next Year

Thinking about when employees at your company will begin to resume business travel, when do you expect to reach at least 50% of 2019's level of business travel?



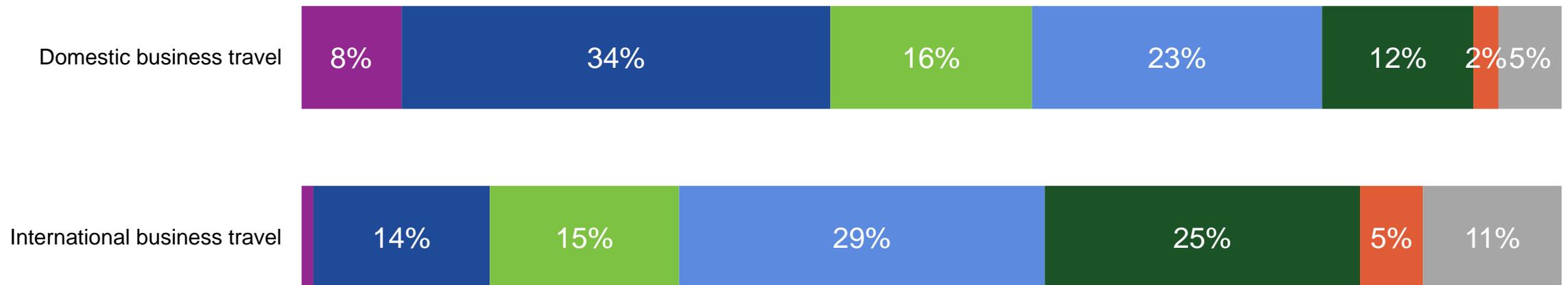
Q. Thinking about when employees at your company will begin to resume business travel, when do you expect to reach at least 50% of 2019's level of business travel?

Note: Question only displayed to travel managers/procurement professionals who are based in a European country (n=141-142)

Most Non-European Companies Expect to Return to 50% of Pre-COVID Trip Volume Within the Next Year

Thinking about when employees at your company will begin to resume business travel, when do you expect to reach at least 50% of 2019's level of business travel?

■ 1-3 months ■ 4-6 months ■ 7-9 months ■ 10-12 months ■ 13-24 months ■ More than 24 months ■ Not sure



Q. Thinking about when employees at your company will begin to resume business travel, when do you expect to reach at least 50% of 2019's level of business travel?

Note: Question only displayed to travel managers/procurement professionals who are based in a non-European country (n=546-567)