

Coronavirus Poll Results

January 21, 2021

Connecting the people that connect the world.™

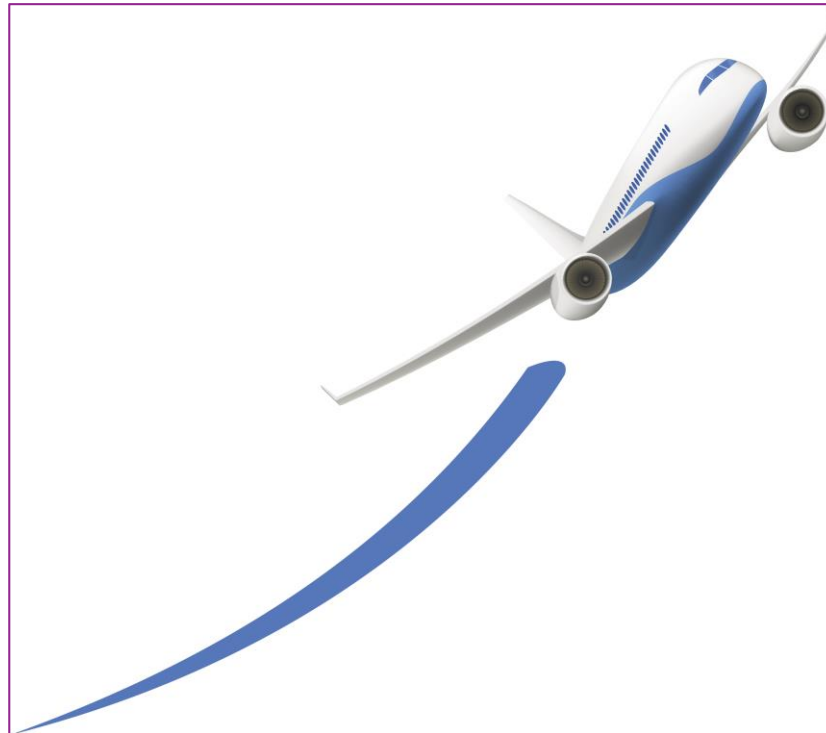


Methodology

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

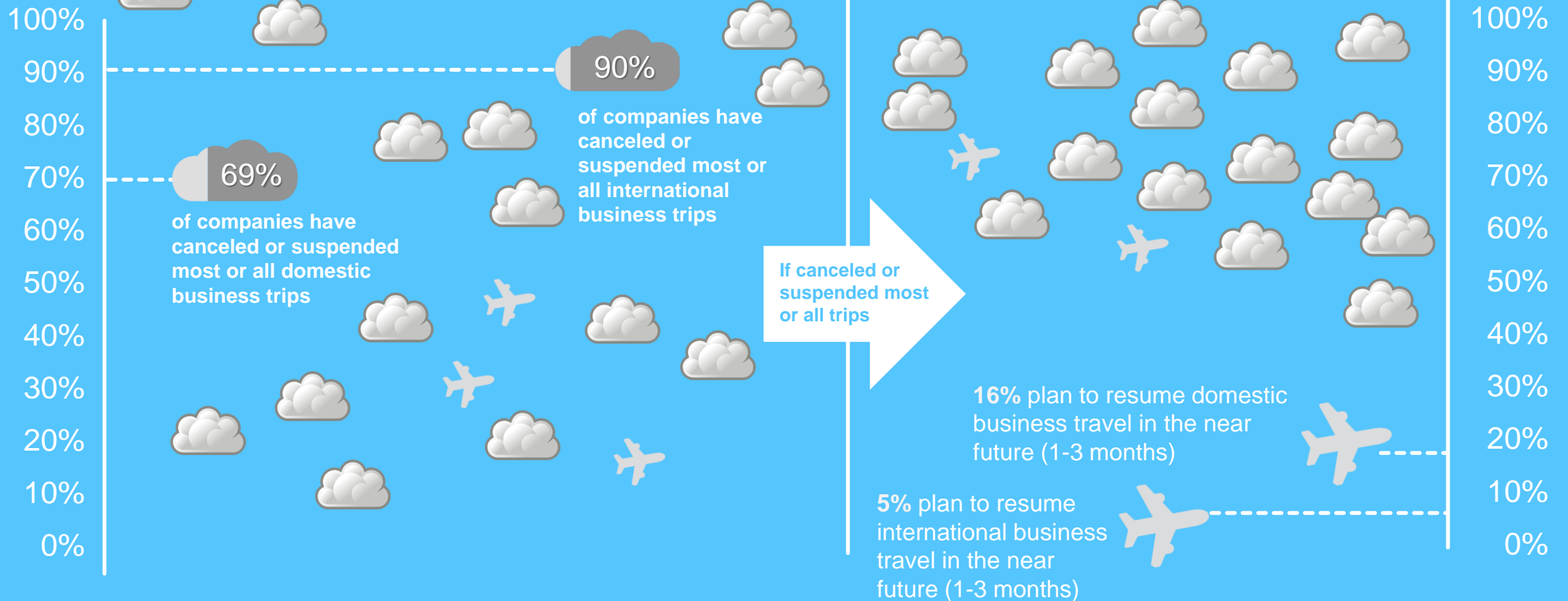
- Fielding took place from December 11 through December 18, 2020
- An email invitation was sent to 16,126 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 733 companies 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



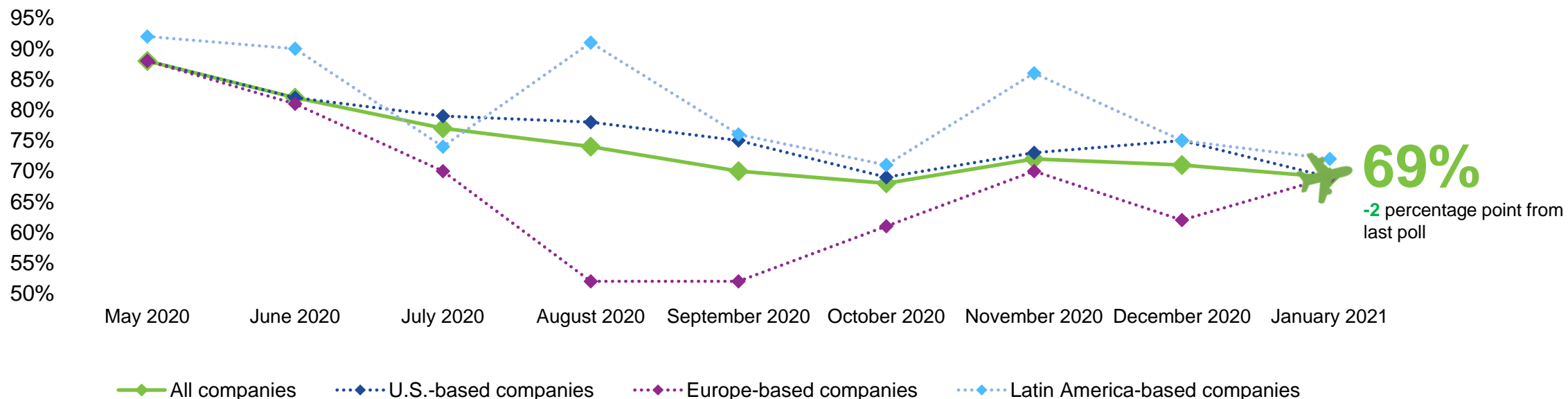
The State of Business Travel

January 2021



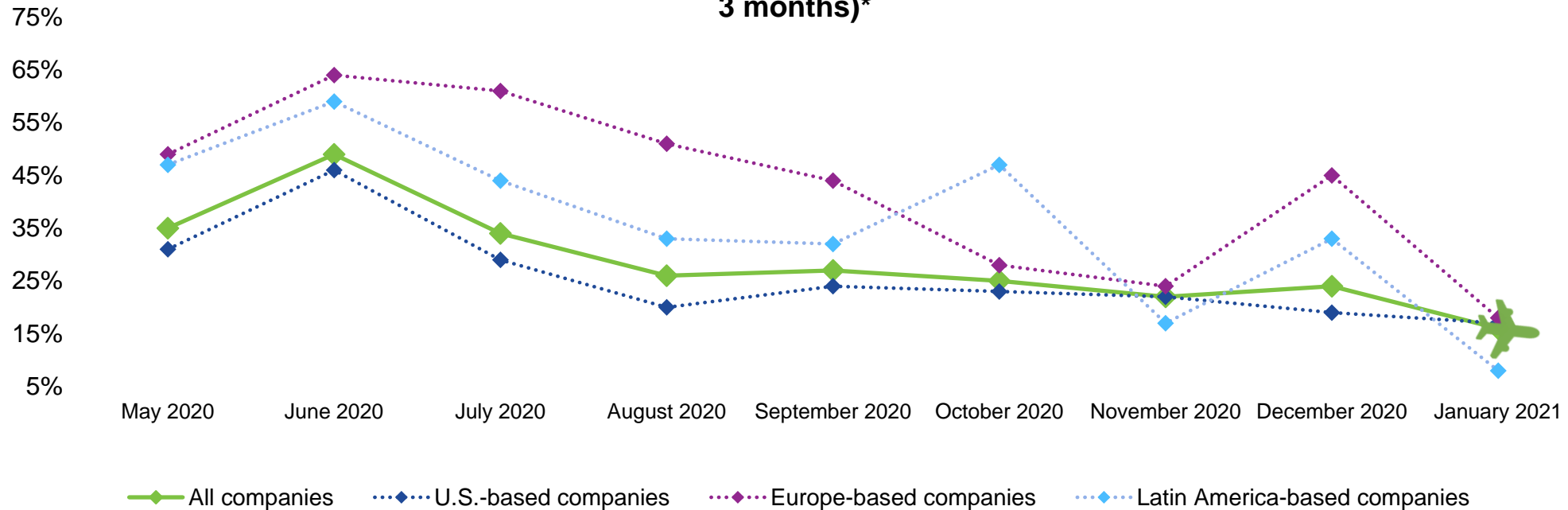
The State of Domestic Business Travel

% 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)*

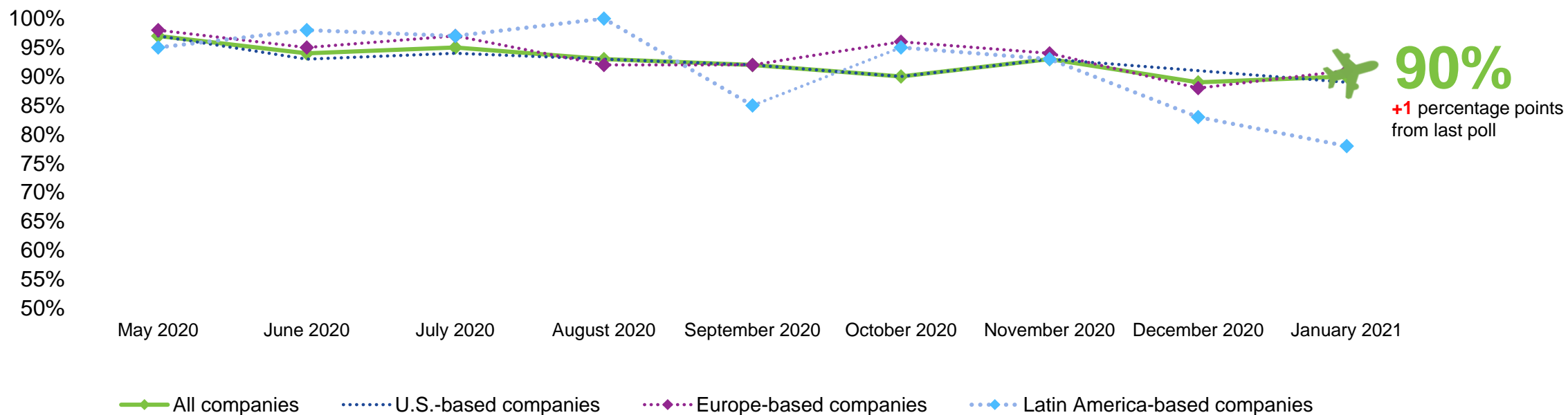


16%
-8 percentage points from last poll

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

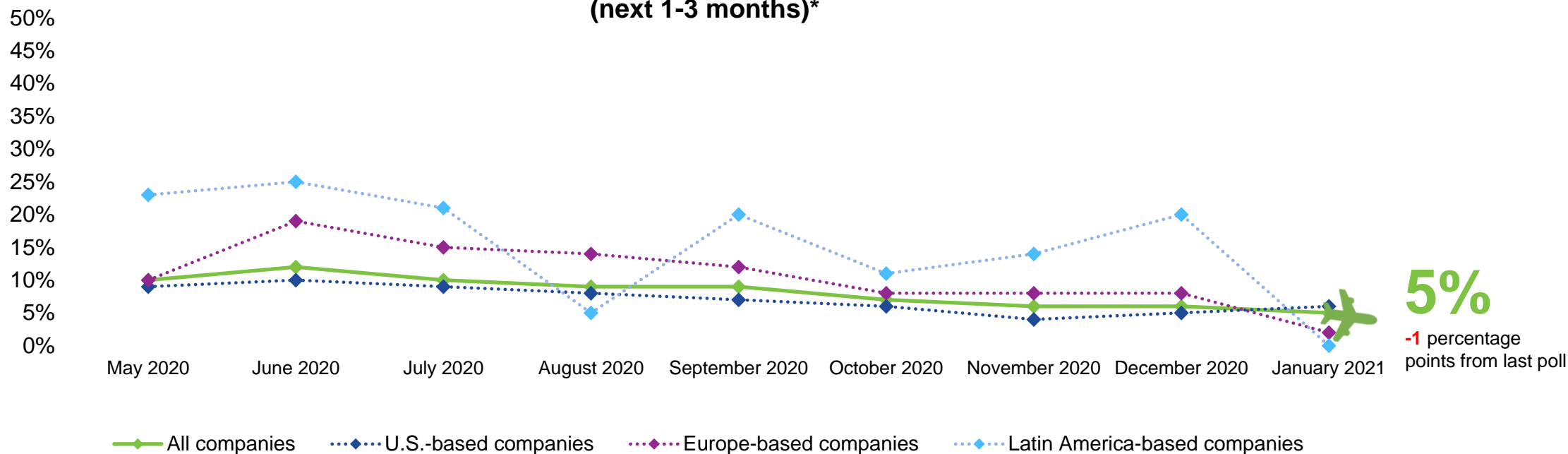
The State of International Business Travel

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



The State of International Business Travel (Cont.)

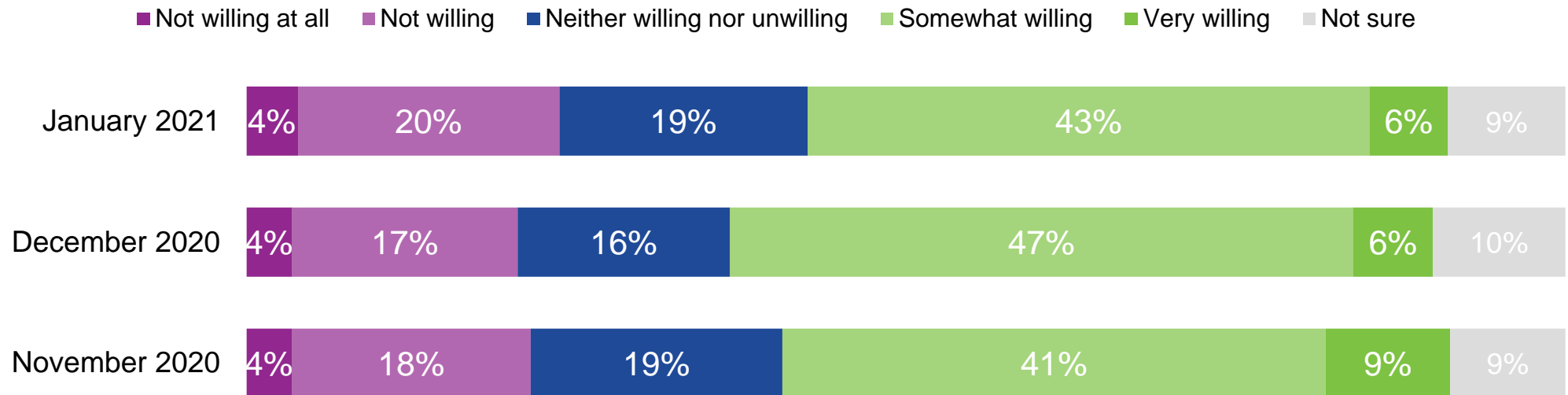
% of companies that plan to resume international business travel in the near future (next 1-3 months)*



*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?

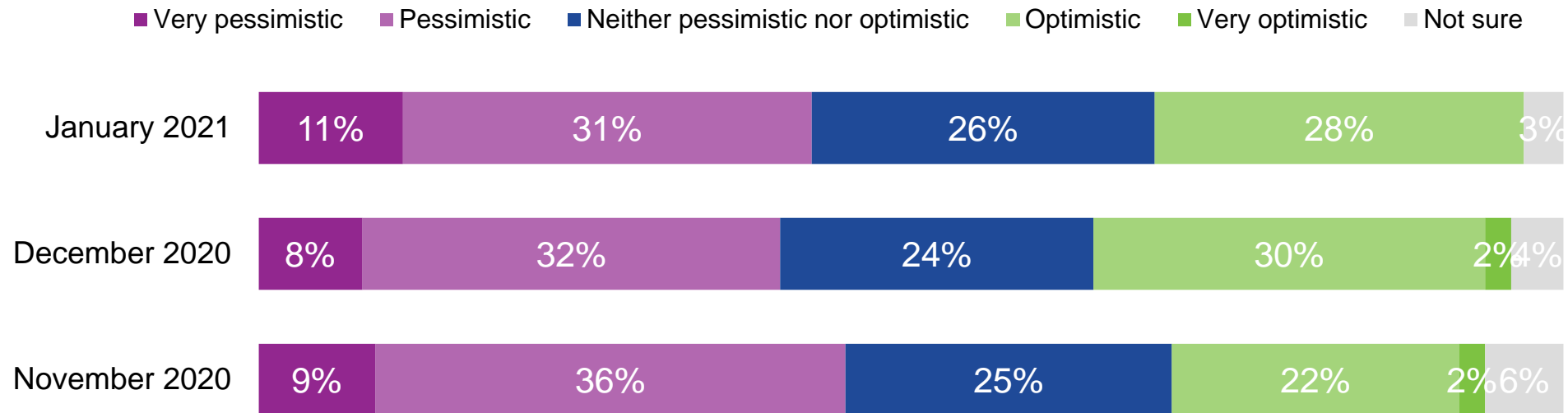


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

Note: Only displayed to travel managers/ procurement professionals (n=353-409)

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



Will Travel Programs Require Employees to Share Vaccination Status or Test Results? Most Haven't Decided Yet

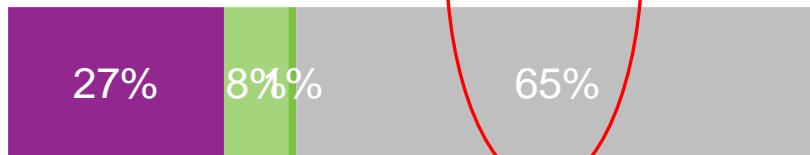
Will companies require employees to do the following before traveling for business...?

■ No - we don't plan to require it ■ Yes - we plan to require it ■ Yes - we already require it ■ Not sure

Certify to our company that they have received a coronavirus vaccine

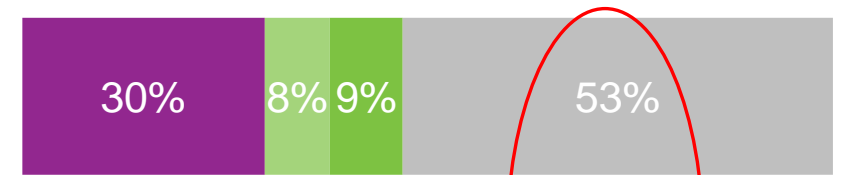


Share record of receiving coronavirus vaccine with our company

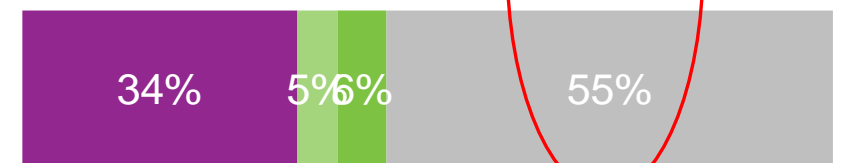


■ No - we don't plan to require it ■ Yes - we plan to require it ■ Yes - we already require it ■ Not sure

Certify to our company that they have tested negative for the virus prior to departure



Share test results with our company prior to departure

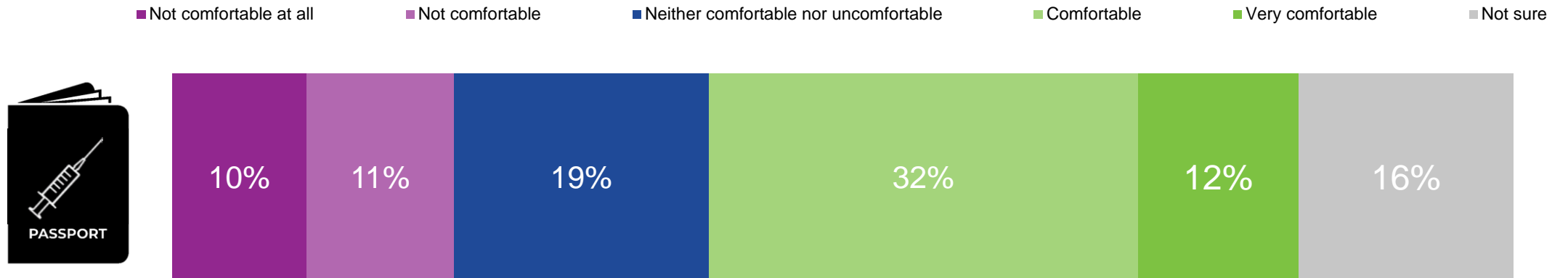


Q. Thinking about your travel program, do you plan to require employees to do the following before traveling for business in 2021?

Note: Question only displayed to travel buyers/procurement professionals (n=368-372)

Some Travel Managers Are Comfortable With “Digital Health” Passports; Others Are Not Sure

Are Travel Managers comfortable with suppliers using mobile apps to verify health information about passengers?



Q. Some airlines will begin using mobile apps known as “digital health passports” to verify compliance with their COVID-related policies. For instance, they might verify if a passenger has received a vaccination or tested negative for the virus. To protect passenger privacy, these apps will not share specific details with the airlines. They will only allow airlines to confirm if passengers have met their requirements to travel. Please rate your comfort with travel suppliers—such as airlines or hotels—using mobile apps to verify the health status of passengers.

Note: Only displayed to travel managers/procurement professionals (n=380)

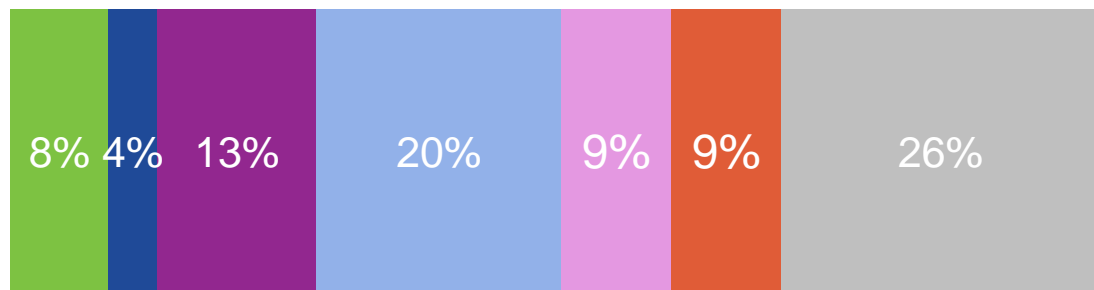
Will Return to Travel Follow a Return to the Office?

When do companies plan to...?



Have most employees return to the office

■ Most have already returned ■ 1-2 months ■ 3-4 months ■ 5-6 months ■ 7-8 months ■ More than 9 months ■ Not sure

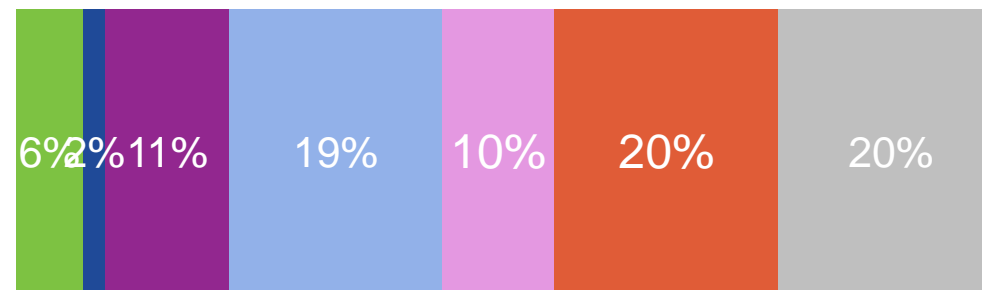


Q. Thinking about your company, when does it plan to have most of its employees return to the office? (n=701)



Resume non-business critical travel

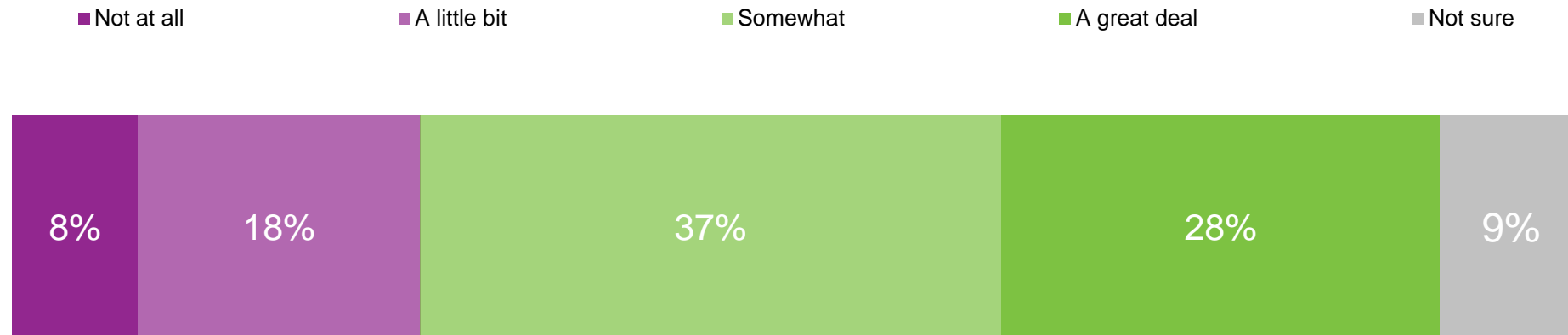
■ Already resumed ■ 1-2 months ■ 3-4 months ■ 5-6 months ■ 7-8 months ■ More than 9 months ■ Not sure



Q. Still thinking about your company, when do you think it is most likely to resume non-business critical travel? (n=692)

Giving Essential Travel Workers Vaccine Priority Could Boost Comfort With Traveling

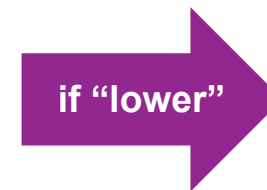
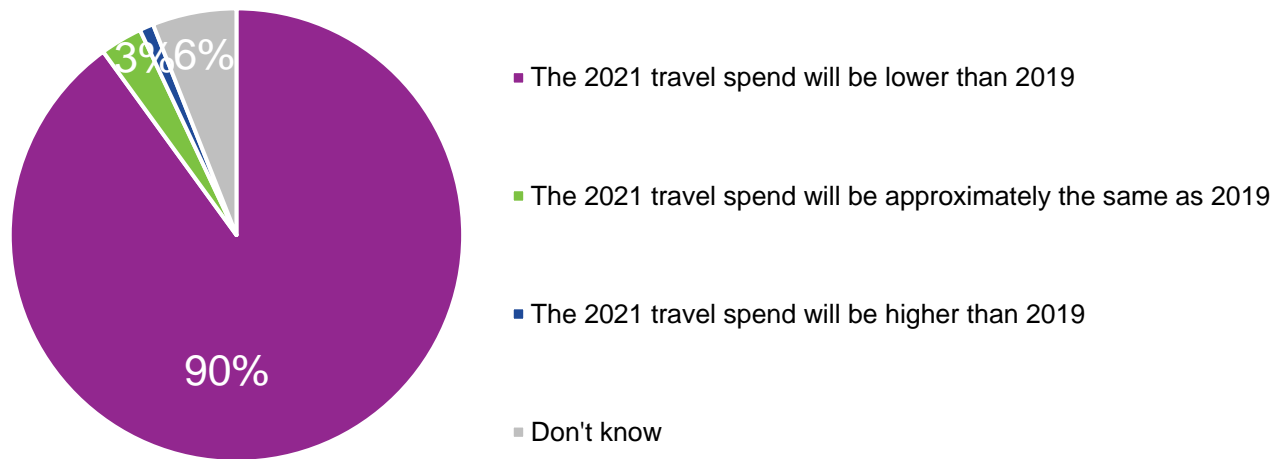
If essential travel workers receive priority for a COVID vaccine, would this you feel more comfortable about your company's employees traveling?



Q. When administering the coronavirus vaccine, some countries have given priority to essential workers. These workers represent a variety of different sectors. Some have advocated for classifying certain travel industry workers—such as flight attendants, pilots, and hotel employees — as essential workers. This could allow them to receive their vaccination before the general population. To what extent would this make you feel more comfortable about your company's employees traveling on business? (n=667)

On Average, Buyers Expect Their Travel Spend Will Be 52% Lower in 2021 Than Before the Pandemic

Will travel spend bounce back in 2021?



On average, respondents estimate their 2021 travel spend will be

52%

lower than in 2019

Q. What do you think your company's travel spend will be in 2021 compared to 2019 (i.e., pre-pandemic)? **Note: Results filtered for travel buyers/procurement professionals (n=374)**

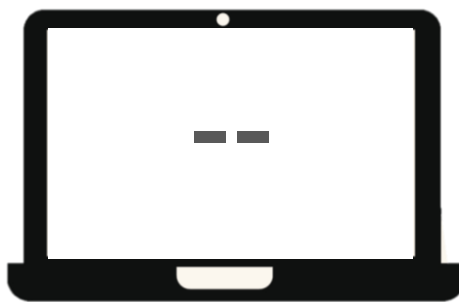
Q. What do you think your company's travel spend will be in 2021 compared to 2019 (i.e., pre-pandemic)? **Note: Results filtered for travel buyers/procurement professionals who expect their company's travel spend to be lower in 2021 than in 2019 (n=314)**

Suppliers See Corporate Bookings Decline

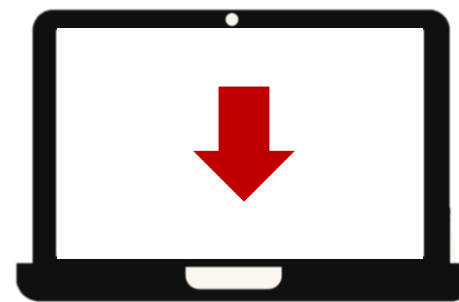
How have bookings from corporate customers changed in the past week?



10% Our bookings have increased



61% Our bookings have remained the same



28% 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** (27%) or **all** (66%) trips to China



91%

of companies have canceled or suspended **most** (36%) or **all** (55%) trips to Latin America



86%

of companies have canceled or suspended **most** (37%) or **all** (49%) trips to Canada



90%

of companies have canceled or suspended **most** (42%) or **all** (48%) international trips



91%

of companies have canceled or suspended **most** (31%) or **all** (60%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



89%

of companies have canceled or suspended **most** (40%) or **all** (50%) trips to European countries



77%

of companies have canceled or suspended **most** (46%) or **all** (31%) trips to the United States

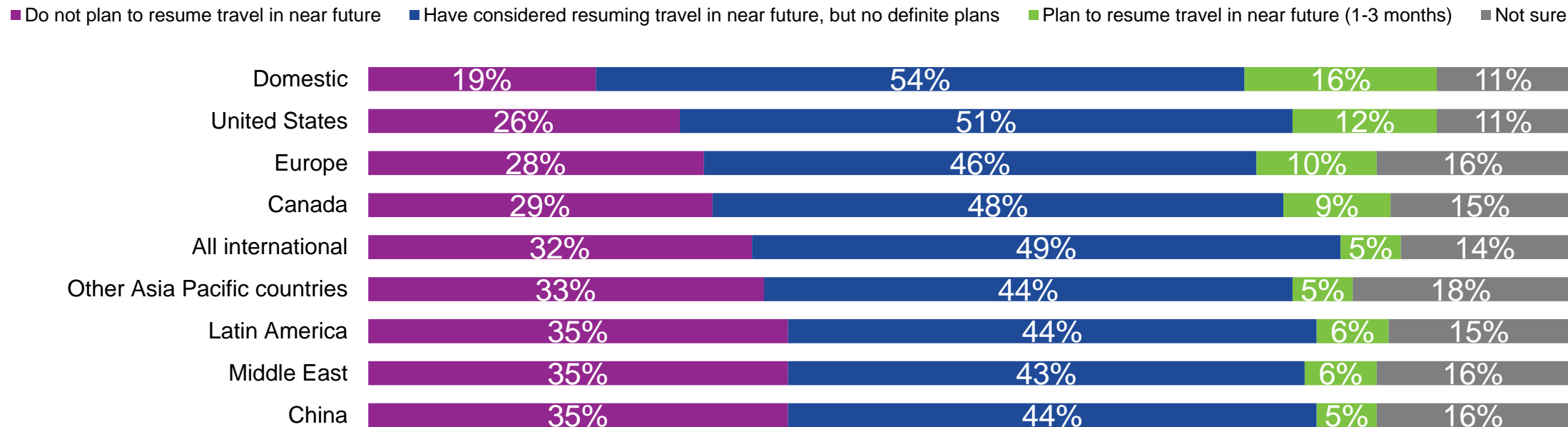


69%

of companies have canceled or suspended **most** (48%) or **all** (20%) domestic travel within their own country

Companies Consider Resuming Travel – But Few Have Definite Plans

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=276-402)