

Coronavirus Poll Results

March 18, 2021

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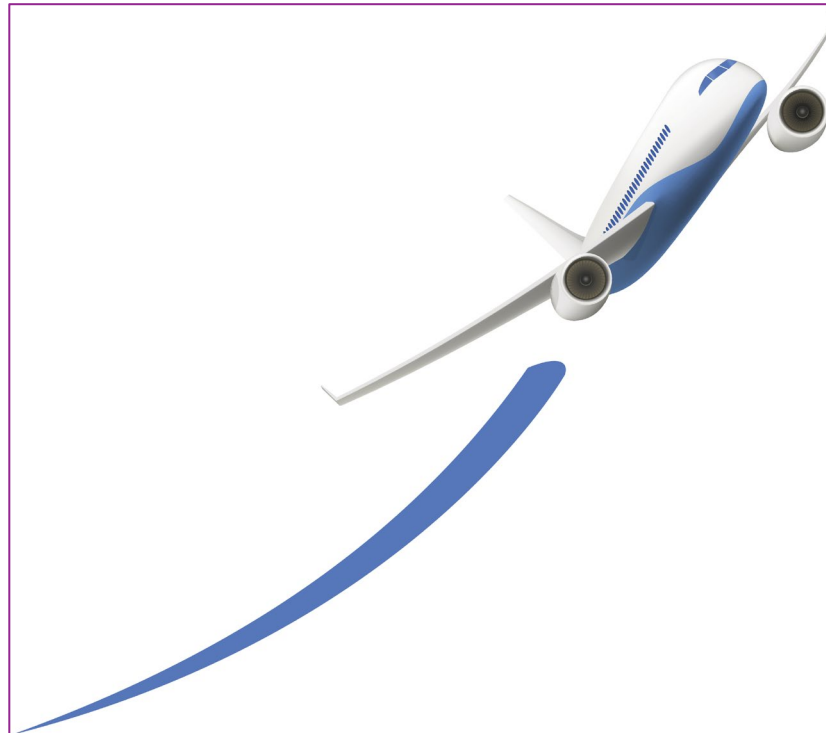


Methodology

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

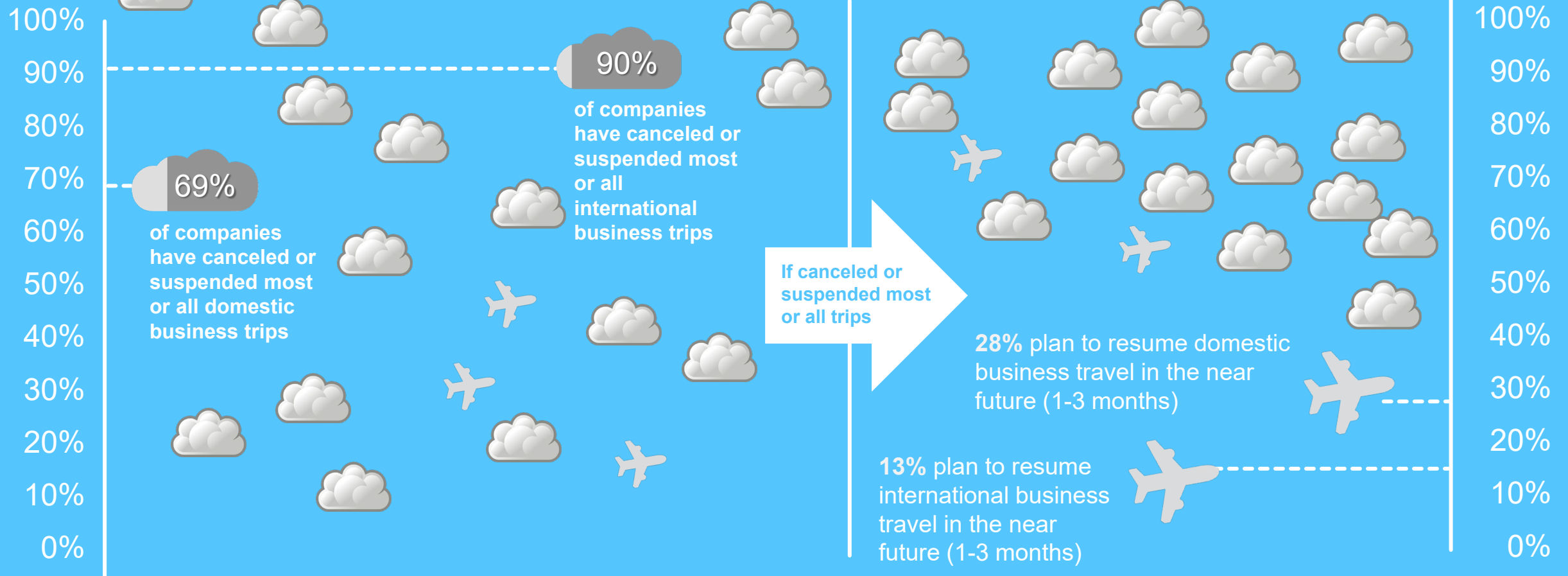
- Fielding took place from March 8 through March 13, 2021
- An email invitation was sent to 16,091 travel professionals including current and inactive members of GBTA; a link to the survey was also included in GBTA's *Daily News Brief* sent to travel professionals worldwide
- In total, 680 companies 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



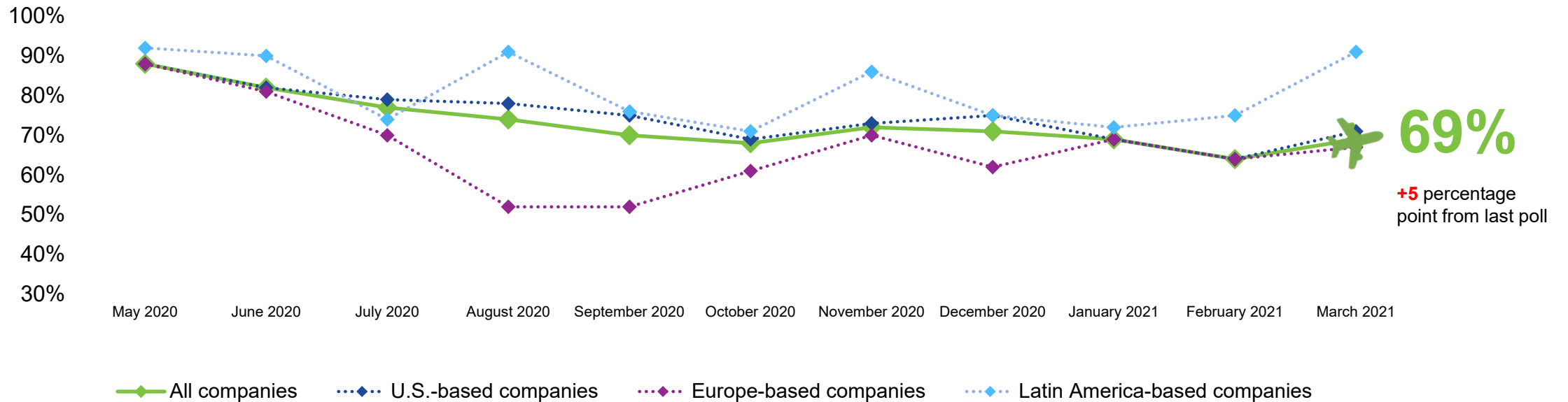
The State of Business Travel

March 2021



The State of Domestic Business Travel

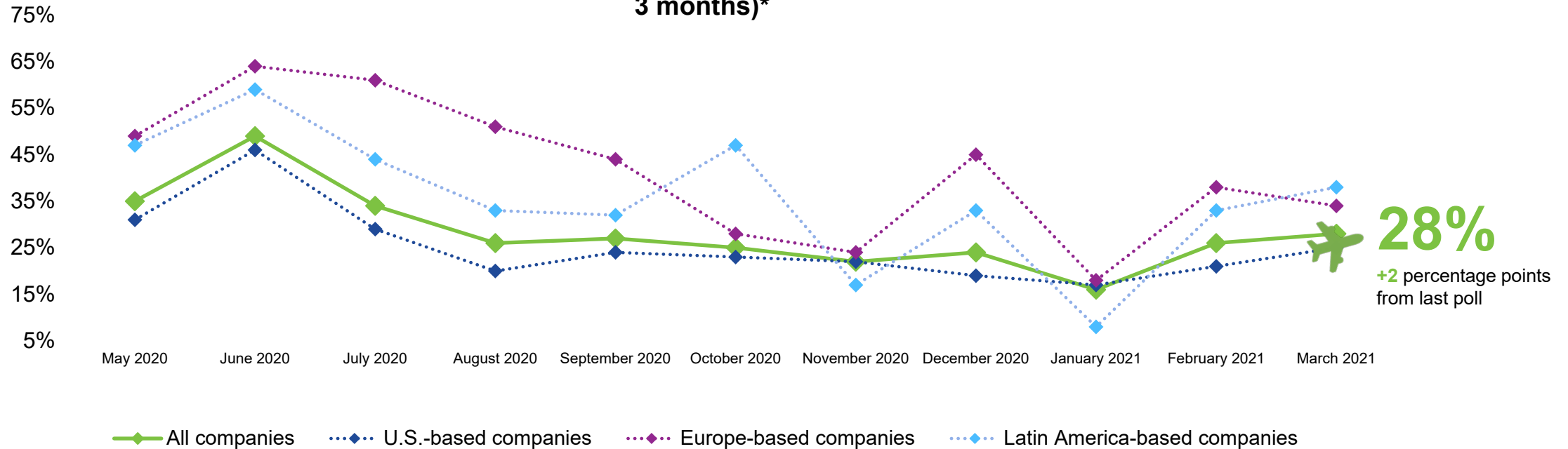
% of companies that have canceled or suspended most or all domestic business travel within their country



Note: Small sample size for Latin America-based respondents in recent polls (n<30)

The State of Domestic Business Travel (Cont.)

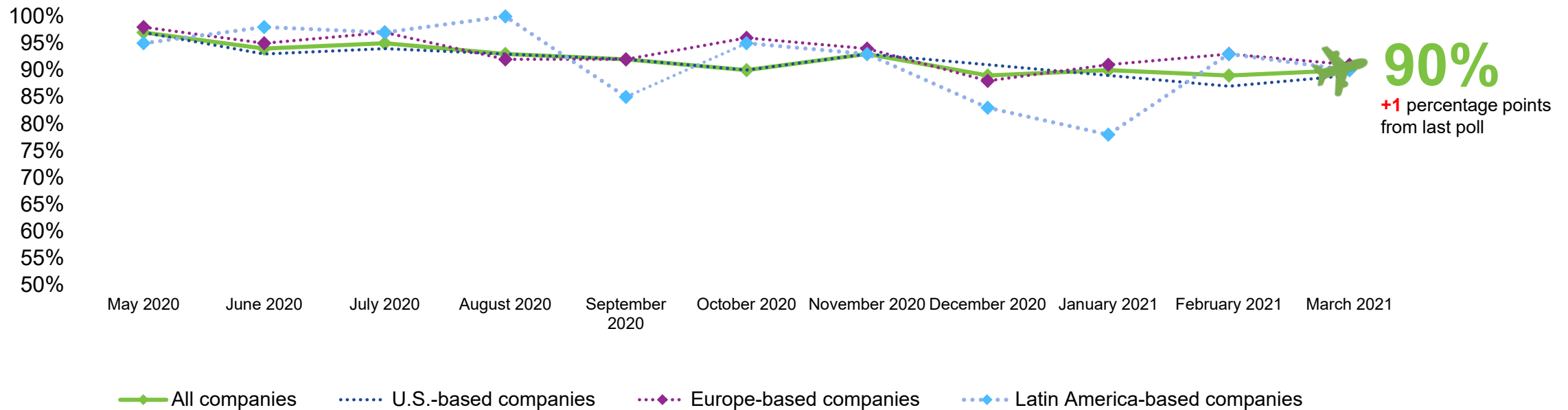
% of companies that plan to resume domestic business travel in the near future (next 1-3 months)*



*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

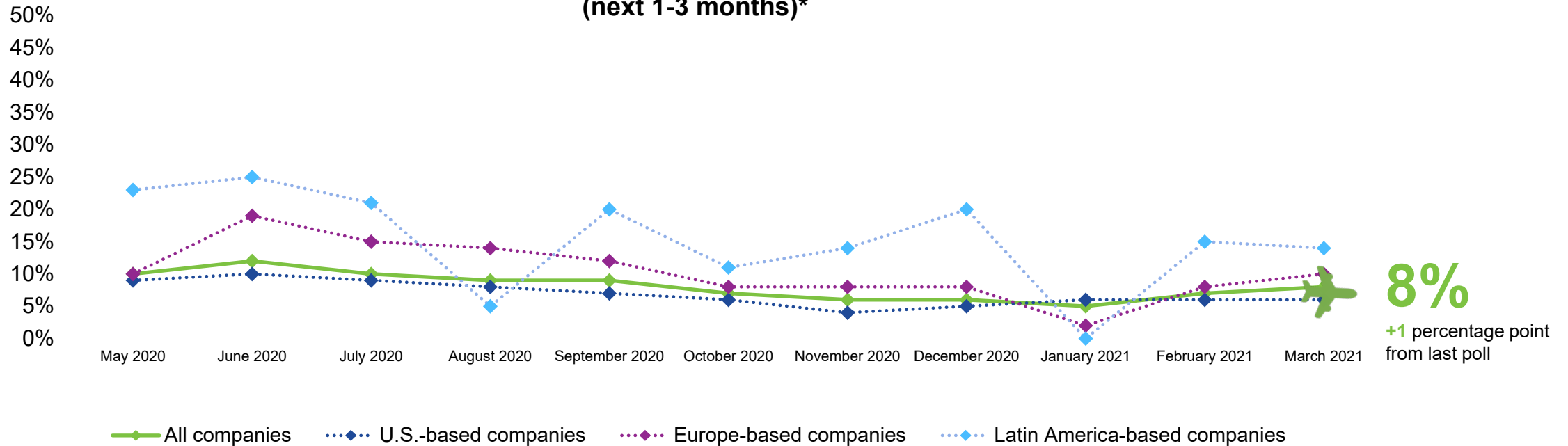
% of companies that have canceled or suspended most or all international business travel



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

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

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

■ Already resumed
 ■ Q1 2021
 ■ Q2 2021
 ■ Q3 2021
 ■ Q4 2021
 ■ Q1 2022
 ■ Q2 2022
 ■ Q3 2022
 ■ Q4 2022

Non-essential domestic business travel



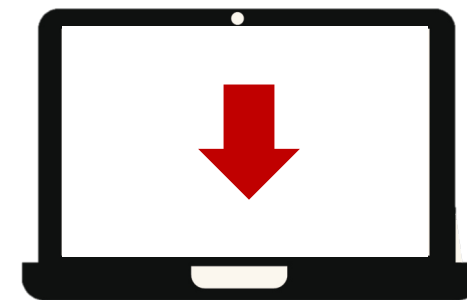
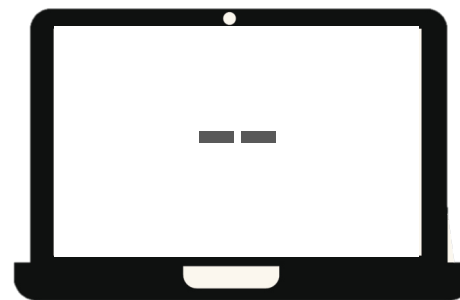
Non-essential international business travel



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

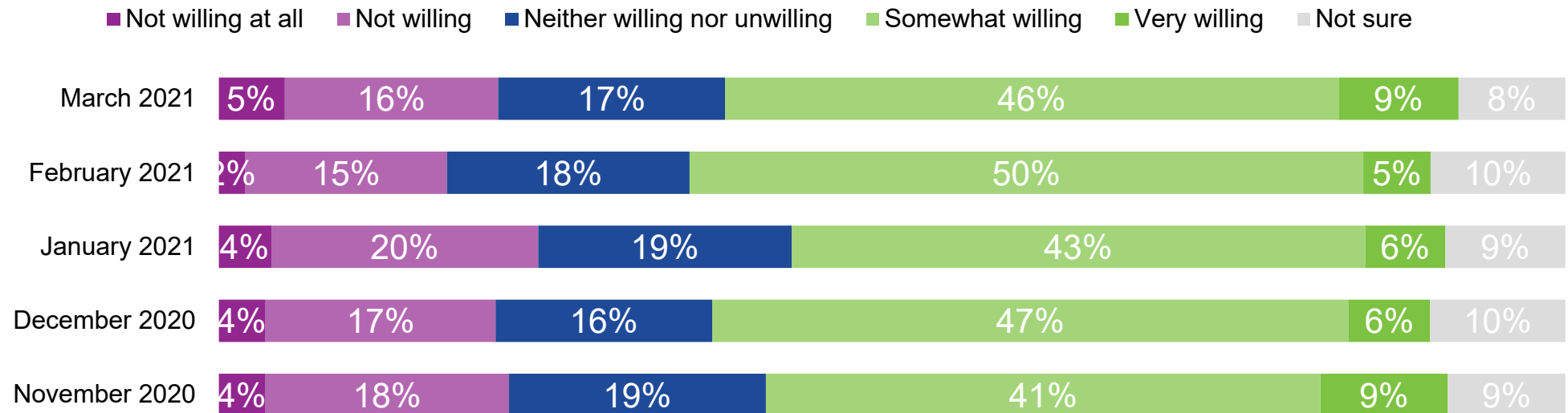
How have bookings from corporate customers changed in the past week?



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?

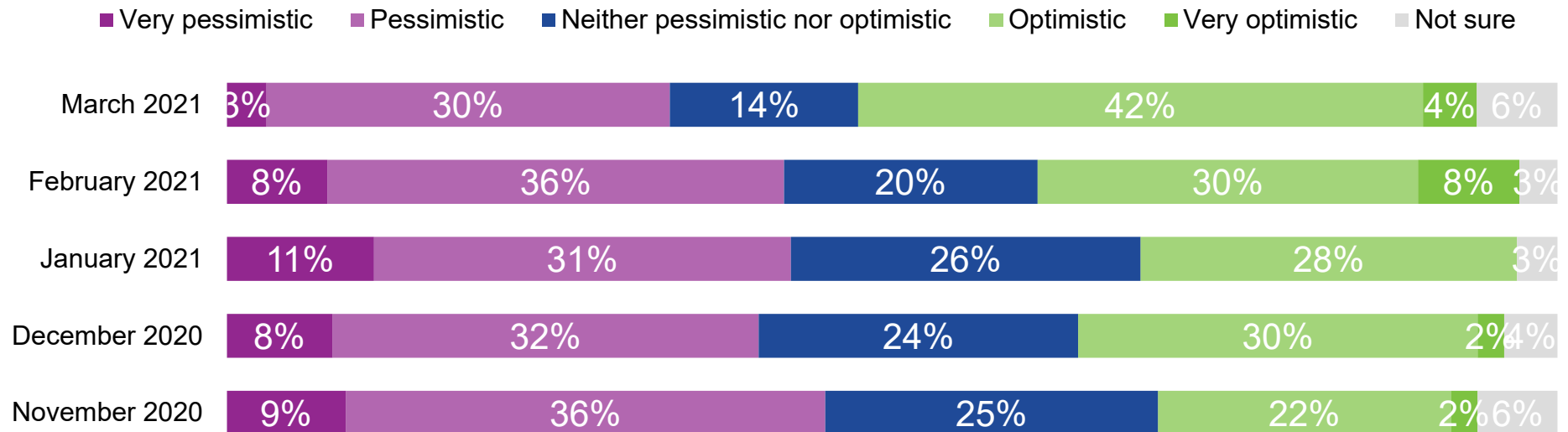


Q. Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

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?



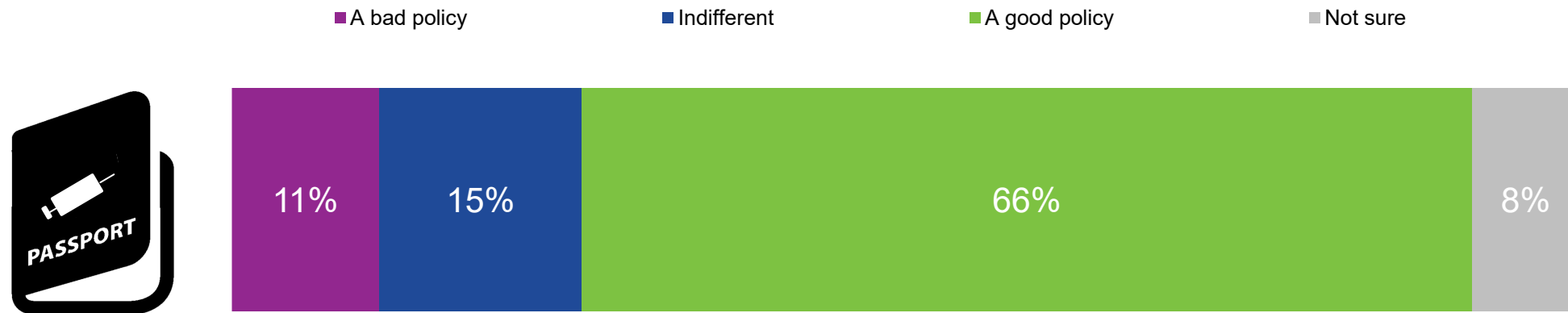
Q. In the current environment, how do you feel about the financial prospects of companies in the business travel sector? **Note: Question only displayed to travel suppliers/TMCs (n=227-332)**

Key Highlights



Respondents Largely Think Digital Health Verification Is a Good Policy

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

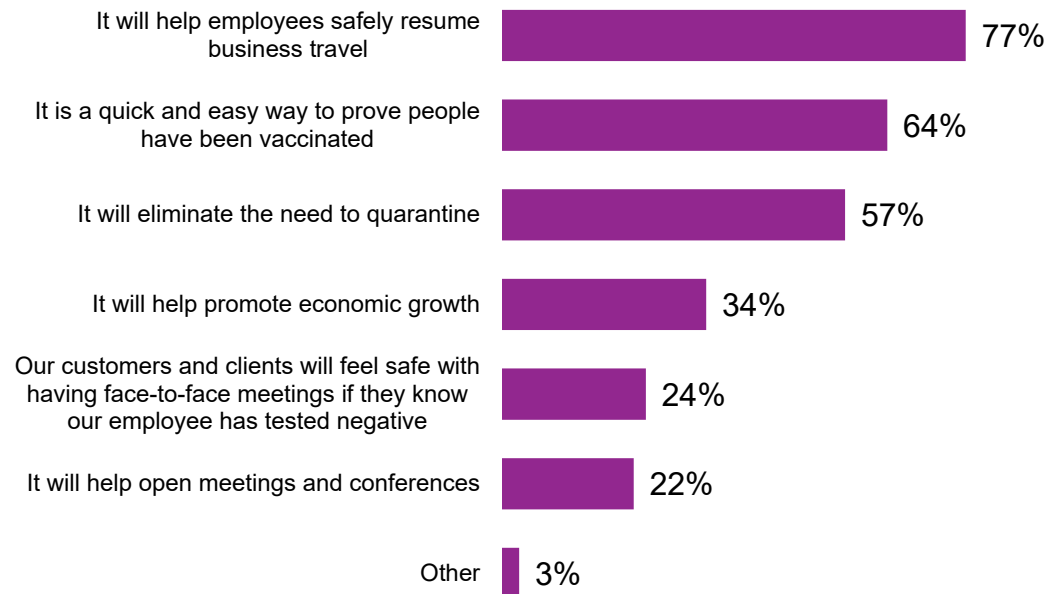


Q. Some countries are considering implementing Digital Health Verification (also known as "vaccination passports") which are government-issued cards or smartphone badges stating the bearer has been inoculated against the coronavirus. The purpose of the vaccine passport is to open up travel and eliminate 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

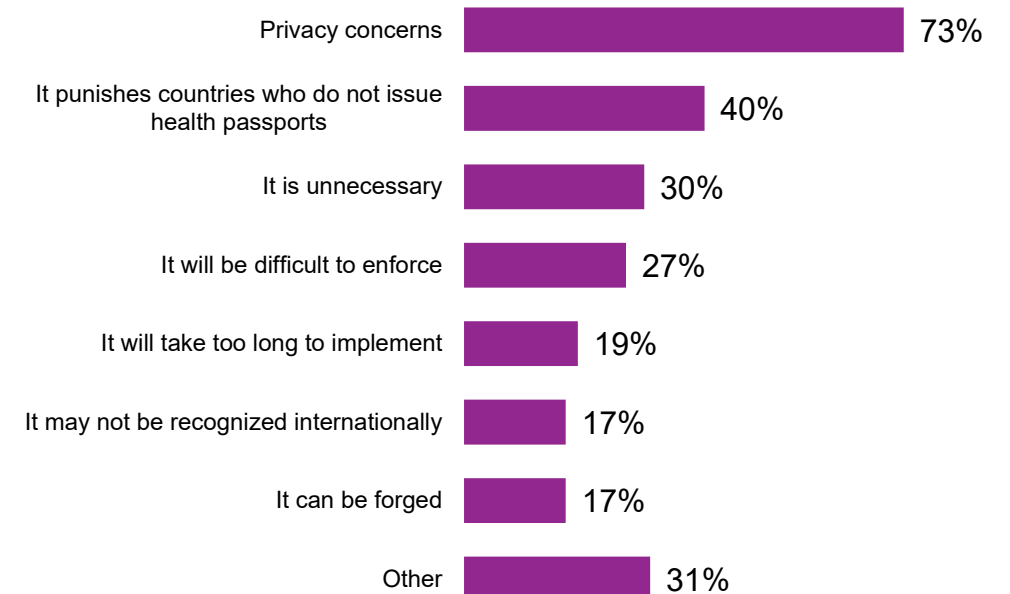
% included in top 3 reasons (out of 6 tested)



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)

A bad policy

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



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

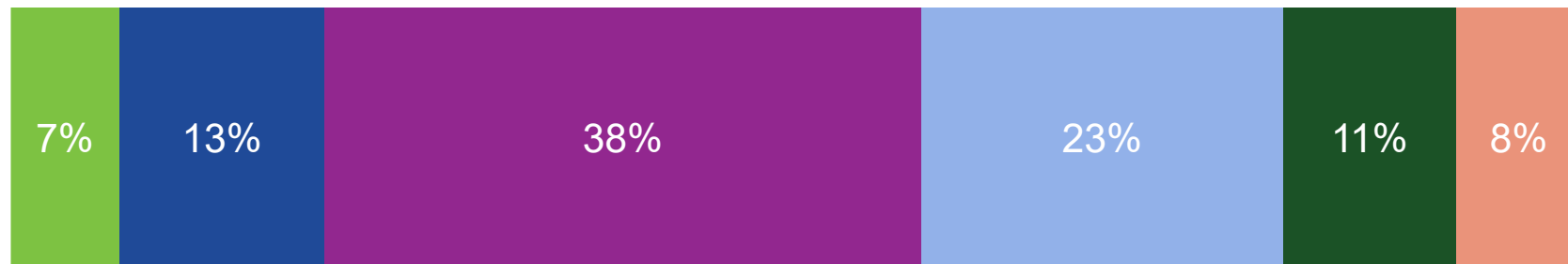


Q. Assuming you receive a Covid-19 vaccine in the next couple months, how do you think you will feel about traveling for business in 2021? (n=591)

Most Companies Expect to Return to the Office in the Next 6 Months

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

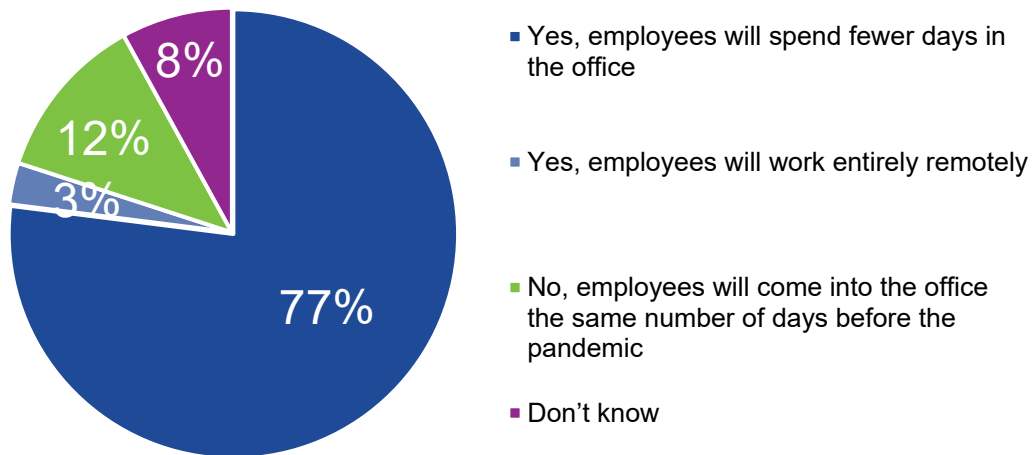
■ We are currently ■ 1-3 months ■ 4-6 months ■ 7-9 months ■ 10-12 months ■ More than 12 months



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)

After Offices Reopen, Employees Will Work From Home More Than in the Past

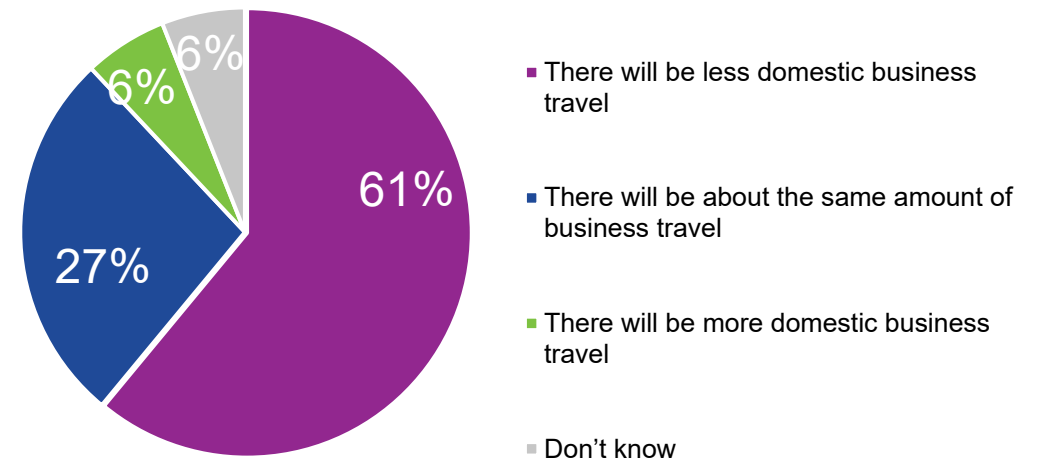
After offices reopen, will employees commute to work less frequently?



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)



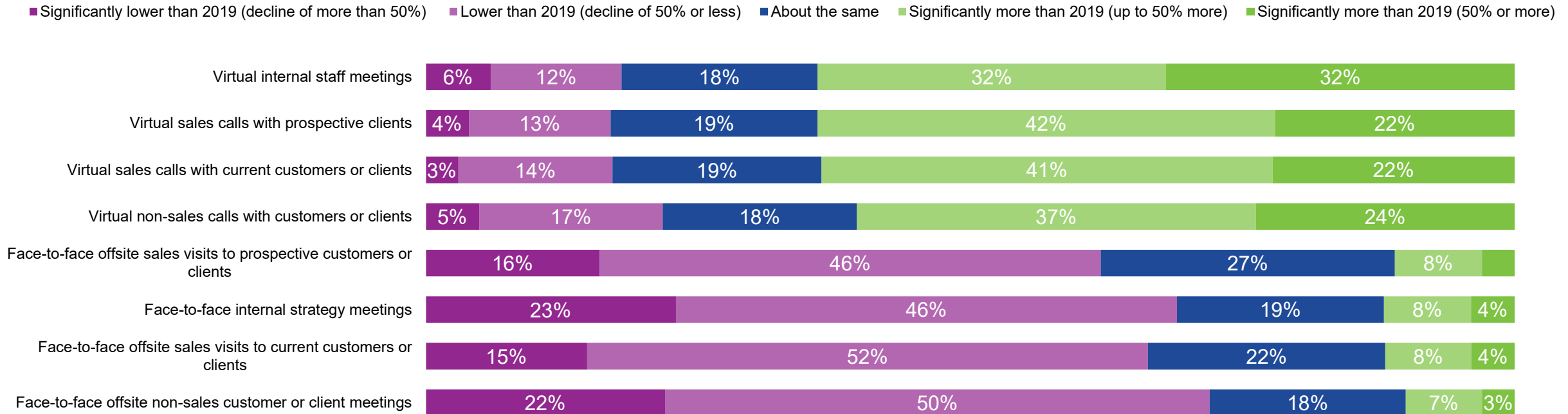
How will this impact domestic business travel?



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?



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...



92%

of companies have canceled or suspended **most** (22%) or **all** (70%) trips to China



90%

of companies have canceled or suspended **most** (28%) or **all** (62%) trips to Latin America



87%

of companies have canceled or suspended **most** (29%) or **all** (59%) trips to Canada



90%

of companies have canceled or suspended **most** (39%) or **all** (50%) international trips



92%

of companies have canceled or suspended **most** (30%) or **all** (63%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



90%

of companies have canceled or suspended **most** (36%) or **all** (53%) trips to European countries



75%

of companies have canceled or suspended **most** (41%) or **all** (34%) trips to the United States

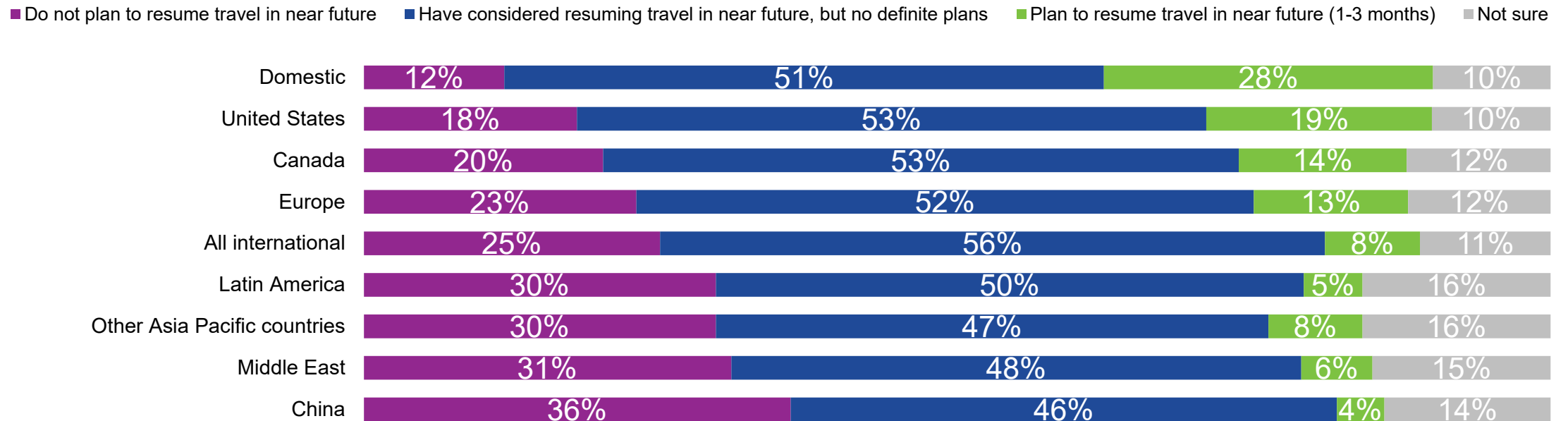


69%

of companies have canceled or suspended **most** (49%) or **all** (20%) domestic travel within their own country

More Than One-Quarter of Companies (28%) Plan to Resume Domestic Business Travel in the Near Future

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=253-362)