Methodology

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

- Fielding took place from April 17 through April 22, 2020
- An email invitation was sent to 5,638 travel professionals
  - Of these, 982 completed at least one question, for a response rate of 17.4%
- An additional 575 people responded through another channel – such as the GBTA Daily News Brief.
Key Highlights
Has the Worst Happened? Travel Professionals Have Mixed Opinions

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

- The worst has already happened
- The worst has yet to come
- Not sure

<table>
<thead>
<tr>
<th>Event</th>
<th>The worst has already happened</th>
<th>The worst has yet to come</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancelled flights</td>
<td>77%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>Hotels suspending operations</td>
<td>62%</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>Layoffs/furloughs in the corporate travel industry</td>
<td>42%</td>
<td>41%</td>
<td>17%</td>
</tr>
<tr>
<td>Revenue loss for travel companies</td>
<td>29%</td>
<td>56%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Q. When thinking about the following, which best describes your view? (n=1,182-1,192)
Most Companies Are Planning for a Recovery in the Next 6 Months…

What is the timeframe you are planning for your post-coronavirus recovery plan?

- Within one month: 21%
- Within 3 months: 27%
- Within 6 months: 8%
- Within 8 months: 10%
- In 2021: 6%
- Don't know: 28%

Q. What is the timeframe you are planning for your post-coronavirus recovery plan? (n=1,256)
…But Supplier Optimism Remains Muted

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

19% are more optimistic than last week
57% feel the same as last week
24% are more pessimistic than last week

Note: Question only displayed to travel suppliers/TMCs

Q. The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a week ago, how do you feel about the industry’s path to recovery? (n=464)
0% of companies generally have not canceled or suspended any business trips.

2% have canceled or suspended business trips on a case-by-case basis but don’t have a specific policy.

1% have canceled or suspended all business trips to particular regions or countries.

35% have canceled or suspended all non-essential trips, but still allow some essential travel.

58% have canceled or suspended all business trips.

Note: Only one answer allowed; 3% indicated “other” (not shown)
### Business Travel Grounded (Cont.)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
<th>Travel Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>99%</td>
<td>99% of companies have canceled or suspended most (10%) or all (89%) trips to China</td>
</tr>
<tr>
<td>Europe</td>
<td>99%</td>
<td>99% of companies have canceled or suspended most (20%) or all (78%) trips to European countries</td>
</tr>
<tr>
<td>Canada</td>
<td>95%</td>
<td>95% of companies have canceled or suspended most (23%) or all (73%) trips to Canada</td>
</tr>
<tr>
<td>Globe</td>
<td>98%</td>
<td>98% of companies have canceled or suspended most (21%) or all (77%) international trips</td>
</tr>
<tr>
<td>Japan, S. Korea, Singapore, Malaysia</td>
<td>99%</td>
<td>99% of companies have canceled or suspended most (15%) or all (84%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)</td>
</tr>
<tr>
<td>Latin America</td>
<td>97%</td>
<td>97% of companies have canceled or suspended most (17%) or all (80%) trips to Latin America</td>
</tr>
<tr>
<td>United States</td>
<td>95%</td>
<td>95% of companies have canceled or suspended most (34%) or all (61%) trips to the United States</td>
</tr>
<tr>
<td>Own Country</td>
<td>93%</td>
<td>93% of companies have canceled or suspended most (40%) or all (52%) domestic travel within their own country</td>
</tr>
</tbody>
</table>

Q. Thinking about your company, how has the coronavirus impacted business travel to…? (n=839-1,076)
Most companies expect to resume domestic travel within 2-3 months. However, international travel may take longer.

What’s the Good News?

Will travel resume within…?

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

Domestic travel:
- 62% within 2-3 months
- 18% within 6-8 months
- 2% within 12 months or longer
- 19% Unsure

International travel:
- 27% within 2-3 months
- 39% within 6-8 months
- 8% within 12 months or longer
- 26% Unsure

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=1,011-1,026)
What Will Influence Decision to Resume Travel?

Thinking about what it would take for you to feel comfortable with your company’s employees traveling on business, how important are each of the following?

- Rate of new infections declines: 92% Important/Very important, 6% Not too important/Not at all important
- Governments lifting travel restrictions or advisories: 91% Important/Very important, 7% Somewhat important
- Public health guidelines or statements (e.g., WHO or U.S. CDC): 90% Important/Very important, 7% Somewhat important
- Effective anti-viral treatments that could make infections less lethal: 89% Important/Very important, 9% Somewhat important
Thinking about what it would take for you to feel comfortable with your company’s employees traveling on business, how important are each of the following? (cont.)

- Stay-at-home lockdowns removed: 88% Important/Very important
- New Coronavirus vaccine developed and available for your employees: 85% Important/Very important
- Advice from a risk management firm/consultant (e.g., WorldAware or International SOS): 60% Important/Very important
- Other companies allowing travel: 49% Important/Very important

Q. Thinking about what it would take for you to feel comfortable with your company’s employees traveling on business, how important are each of the following? (n=1,120-1,177)