



Corporate Travel Policy Survey

Published June 29, 2020

Uniglobe[®]Travel

Purpose & Methodology

- Uniglobe Travel conducted a survey of its corporate accounts to determine how their corporate travel policy may change to reflect the impact of the Covid-19 travel environment. Additionally, the survey looked at timing and expectations of when and how the organizations would resume travelling.
- The survey was sent by Uniglobe agencies to their corporate clients between June 15-25.
- The survey was aimed at travel managers and those with decision making authority or impact on their organization's travel program.
- There were 263 valid, completed responses.

Corporate Travel Policy Survey

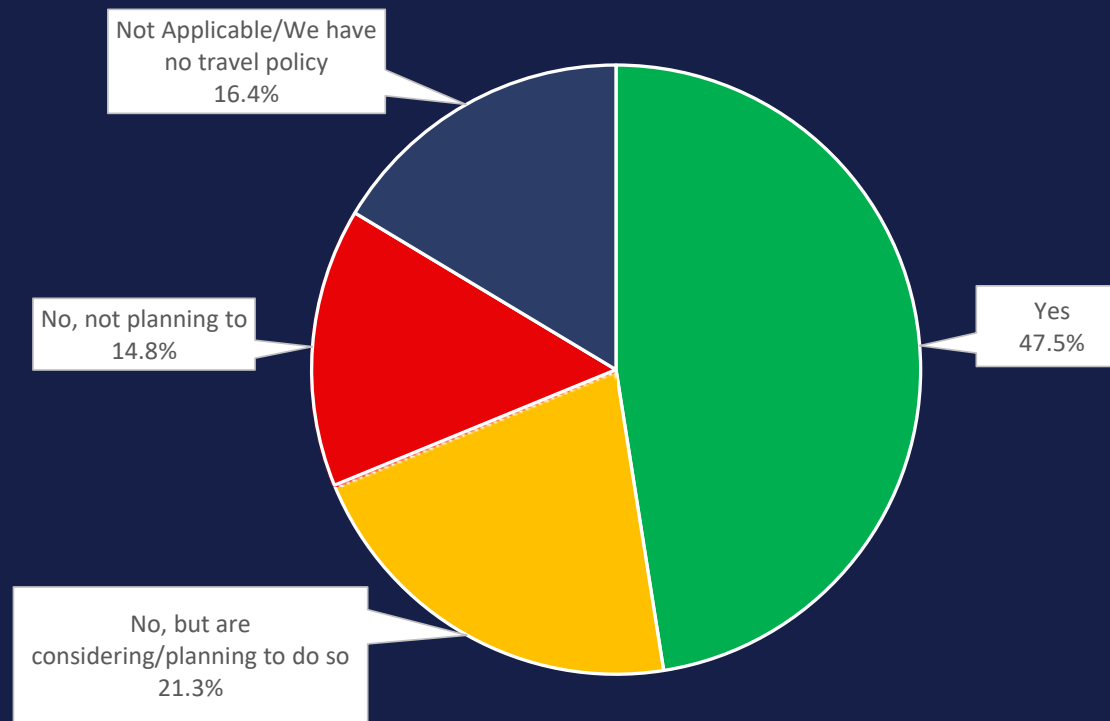
Travel Policy Questions

The logo for 'Travel Well' is located in the bottom right corner of the slide. It features the words 'Travel' and 'Well' stacked vertically in a light green, handwritten-style font. The background of the slide is a dark blue gradient with a repeating pattern of small, light blue and green geometric shapes, including arrows and dots, at the bottom.

Key Findings – Travel Policy

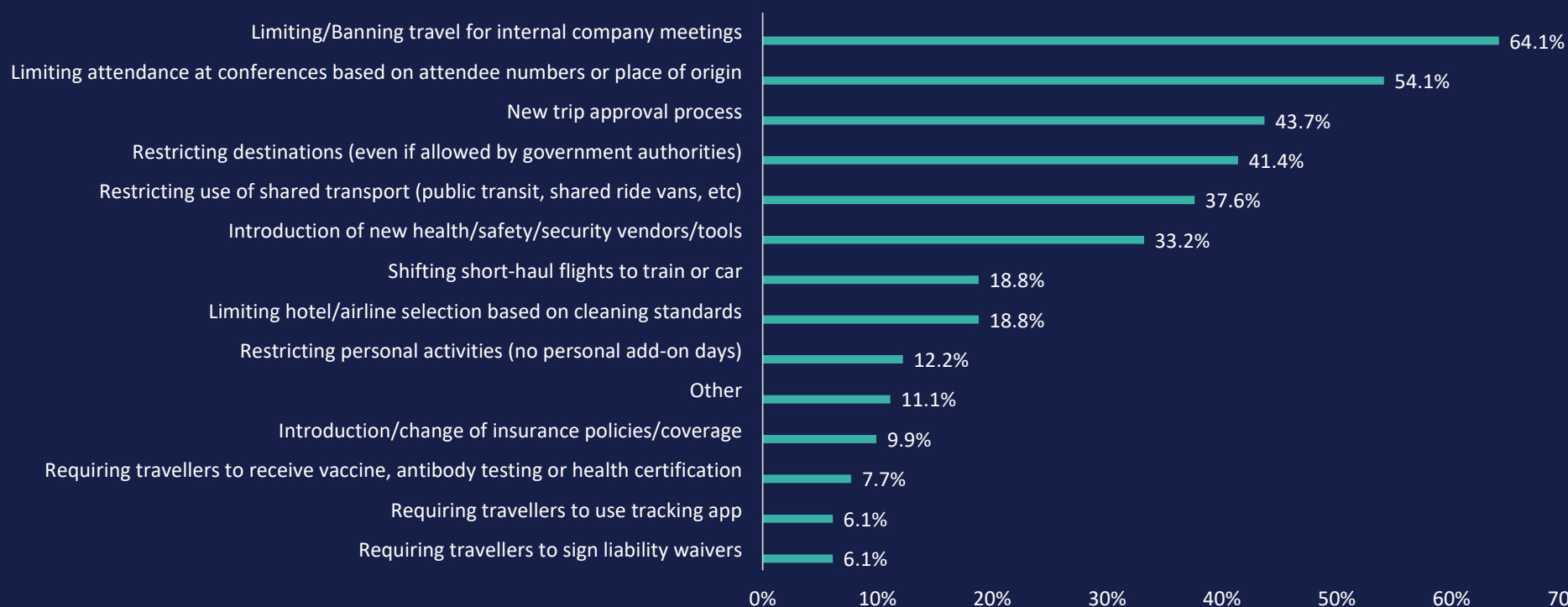
- Europeans are more likely than North Americans to have already updated policy (56% vs 41%). [Ref: Question 1]
- The most common policy changes are limiting or banning travel for internal meetings (64.1%) and limiting participation at meetings/conferences based on attendee numbers or places of origin (54.1%). [Ref: Question 2]
- Fewer than 10% of companies intend to introduce or change insurance policies (9.9%), require travellers to have a vaccine or take antibody tests (7.7%), have travellers sign liability waivers (6.1%), or require use of a tracking app (6.1%). [Ref: Question 2]
- Amongst accommodation types, there is a strong preference for hotel while most companies (53%) intend to ban use of homeshare (eg Airbnb). [Ref: Question 3]
- Well over half (55.4%) of companies that had sustainability and environmental considerations in their travel policy prior to Covid-19 expect to strengthen or enhance the sustainability polices in the next 18 months. [Ref: Question 5]

Question 1: Has your organization updated your travel policy to reflect the Covid-19 travel environment?



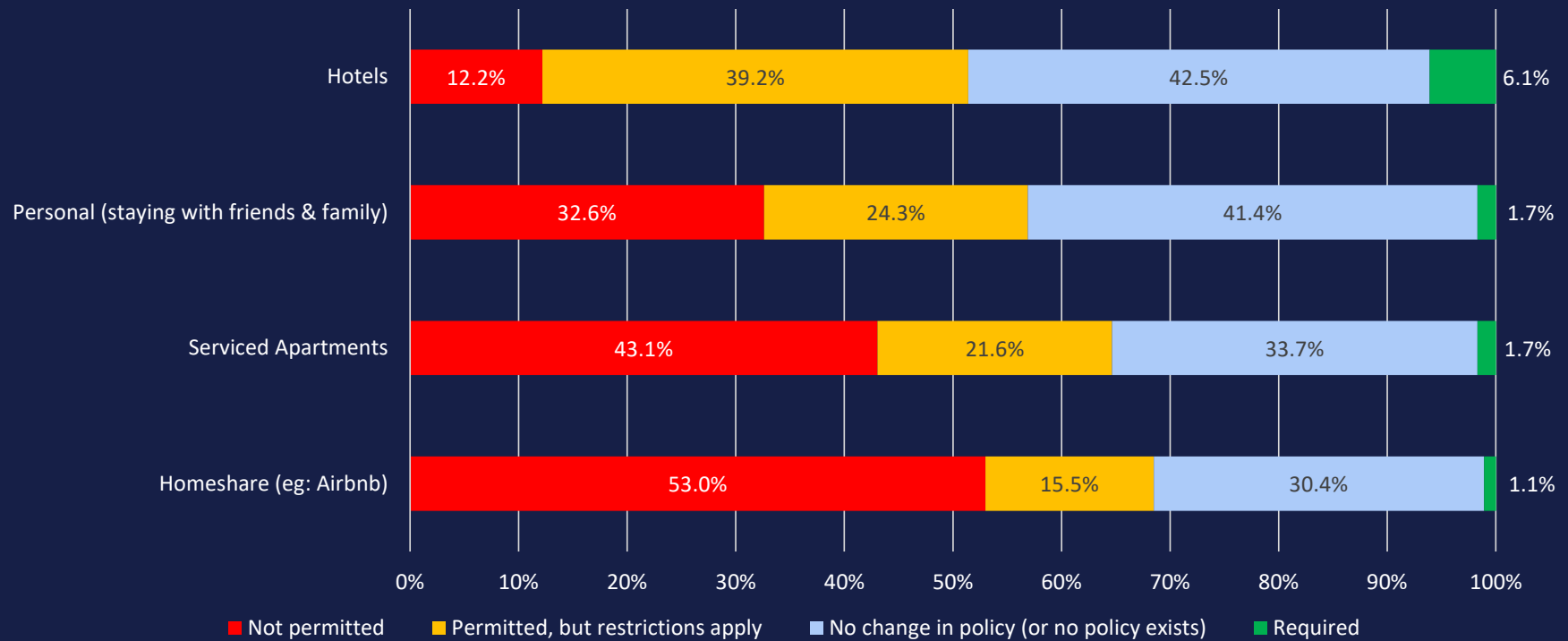
Question 2: What travel policy changes have you made or are considering? (select all that apply)

Amongst companies that have changed policy or are planning to do so

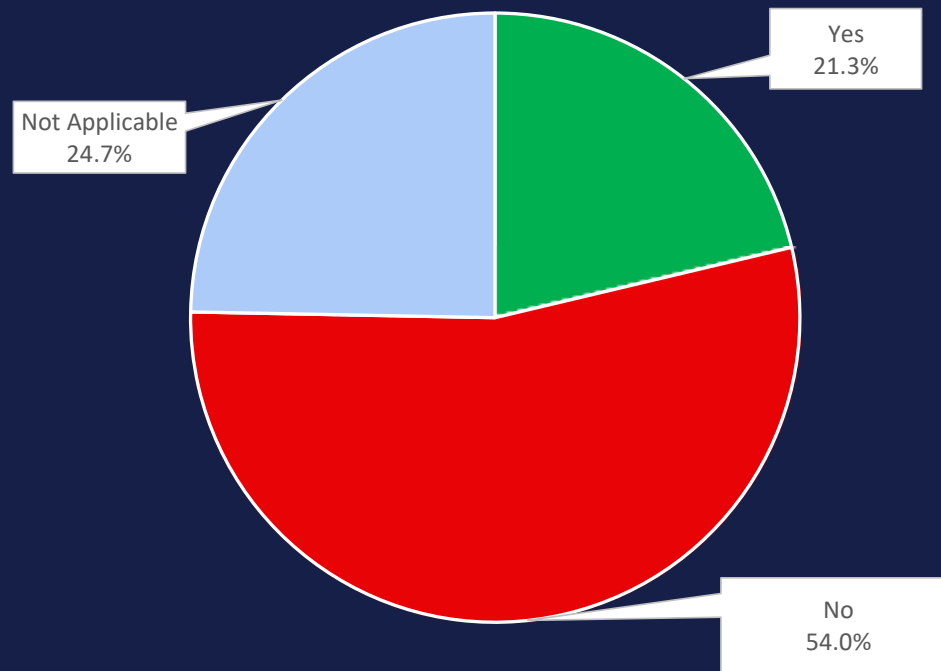


Question 3: What travel policy changes have you made or are considering regarding accommodations?

Amongst companies that have changed policy or are planning to do so

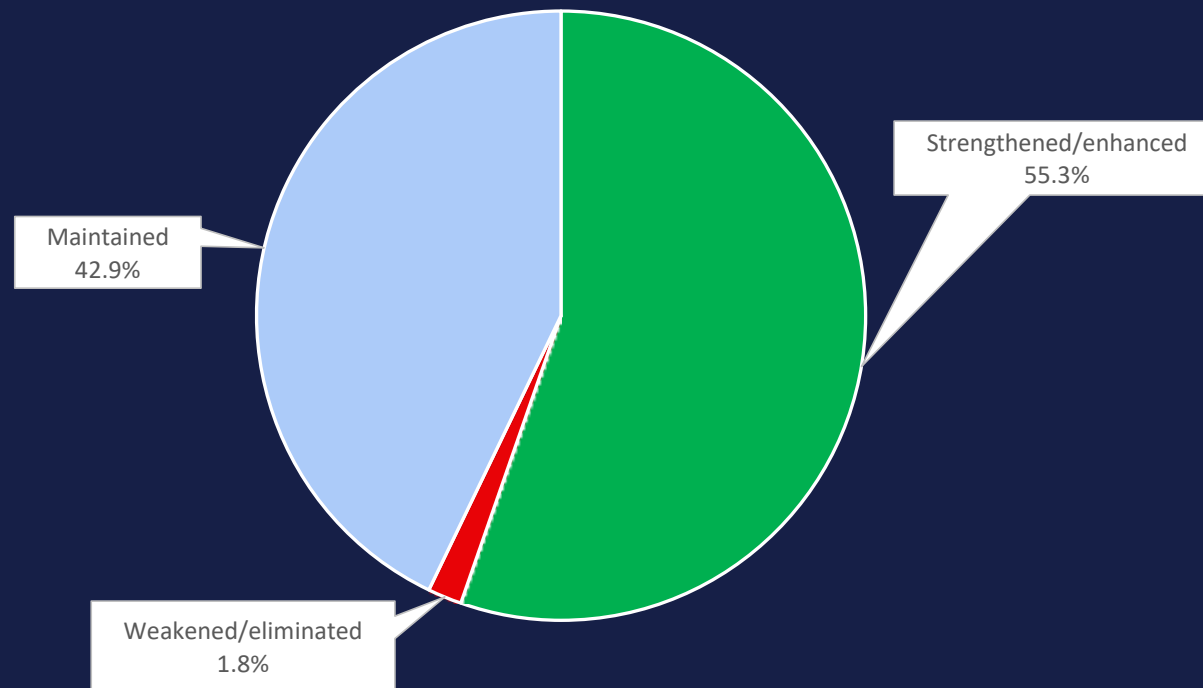


Question 4: Prior to Covid-19, did your policy include any environmental/sustainability considerations or requirements?



Question 5: In the next 18 months, do you expect the environmental/sustainability policies to be:

Amongst companies that have sustainability considerations in their pre-Covid19 travel policy



Corporate Travel Policy Survey

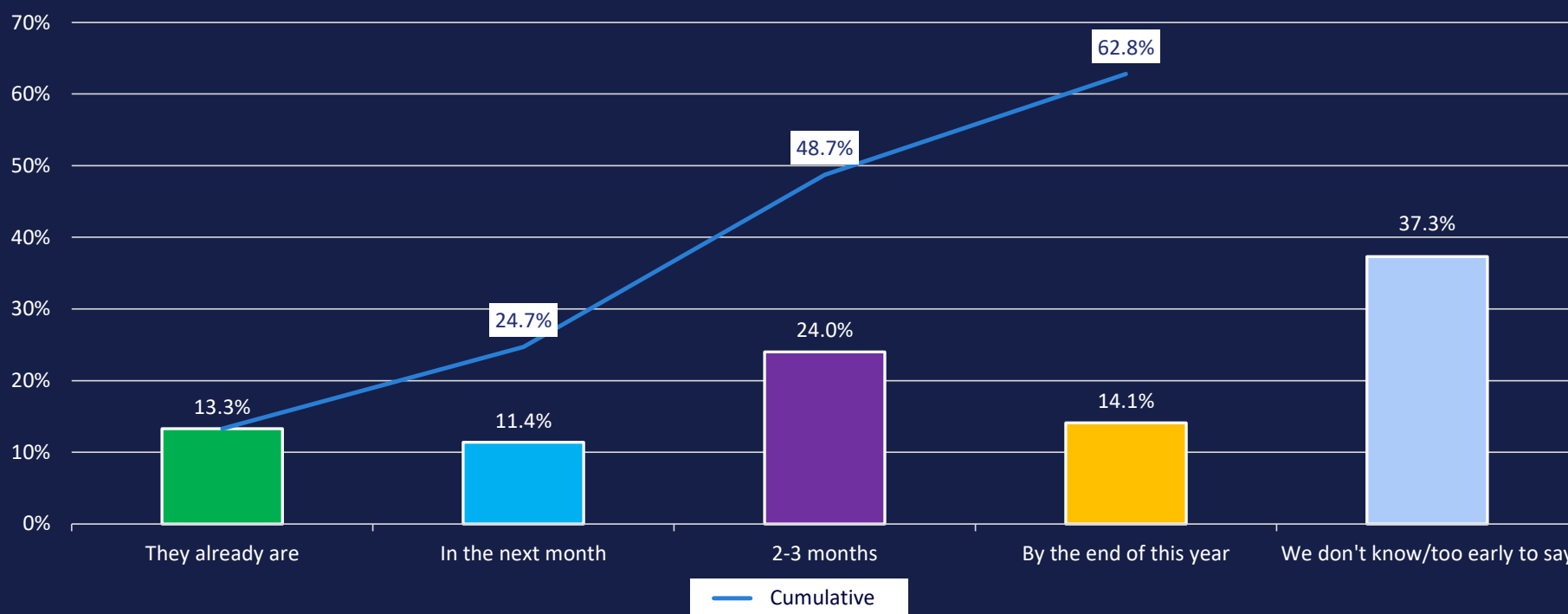
Travel Restart Questions

The logo for 'Travel Well' is located in the bottom right corner. It features the words 'Travel' and 'Well' stacked vertically in a light blue, handwritten-style font. The background of the slide is a dark blue gradient with a repeating pattern of light blue and green geometric shapes, including arrows and dots, at the bottom.

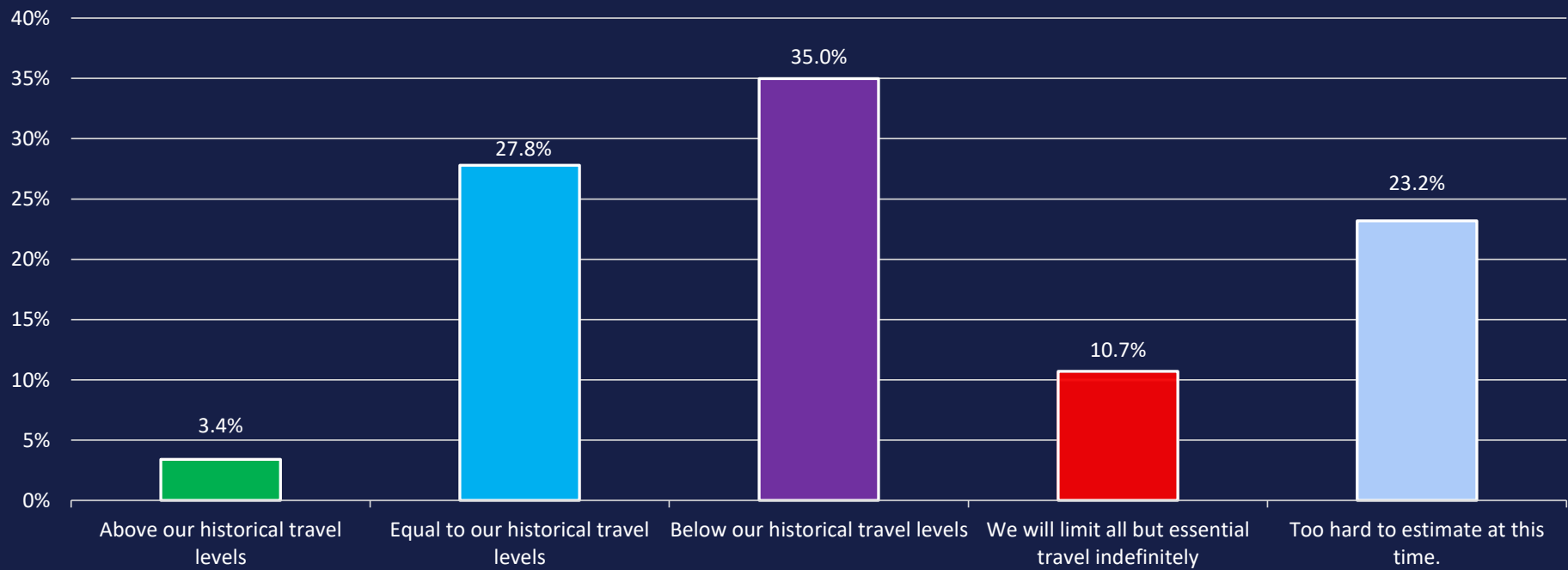
Key Findings – Travel Restart

- Almost half of companies (48.7%) either already have employees travelling, or expect to do so within 3 months. [Ref: Question 6]
- This varies by market. 61% of Europeans indicate they are either travelling already, in the next month or in 2-3 months, whereas only 32% of North Americans selected these options. [Ref: Question 6]
- North Americans are less confident about the future with 51% saying they don't know or it's too early to say when their employees will start travelling, compared with 27% of Europeans. [Ref: Question 6]
- For the period after widespread availability of a vaccine, only 11.4% of respondents expect to see 50% or more of travel to be moved to virtual/video meetings. [Ref: Question 8]

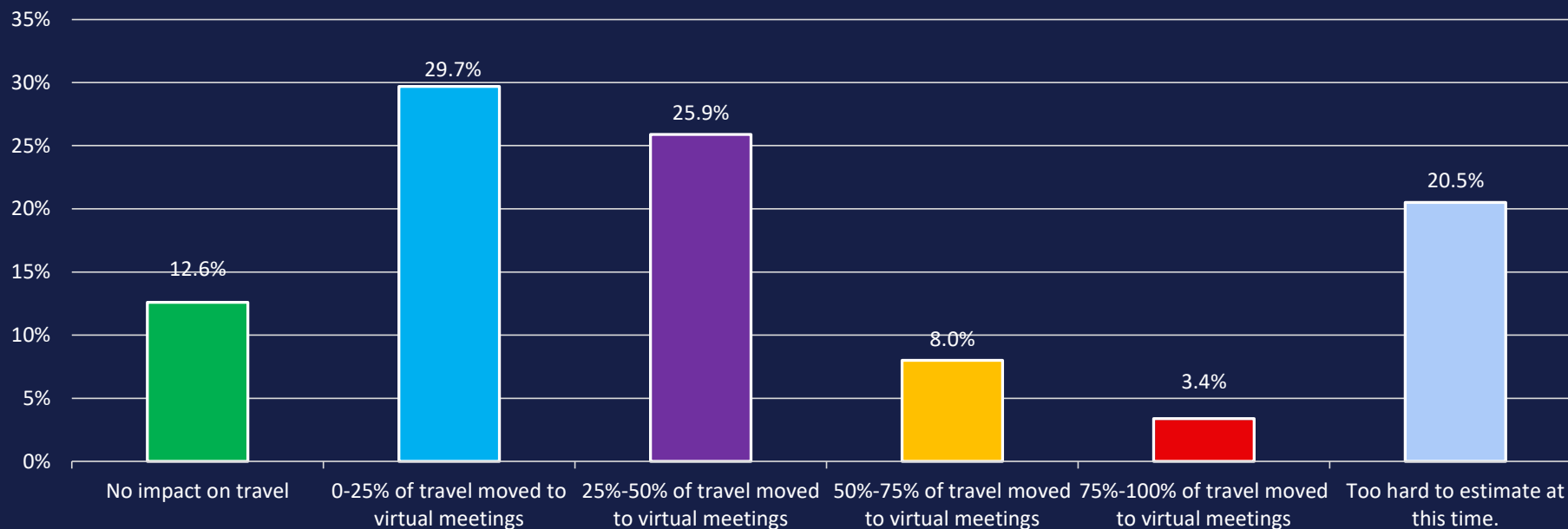
Question 6: When do you expect employees to start travelling for business?



Question 7: Thinking ahead, if a vaccine is broadly available by March 2021, do you expect that travel volumes (number of trips/travellers) for the 12 months following the vaccine availability to be:



Question 8: Thinking ahead, if a vaccine is broadly available by March 2021, do you expect that travel volumes (number of trips/travellers) for the 12 months following the vaccine availability will be impacted by the use of virtual/video meetings?

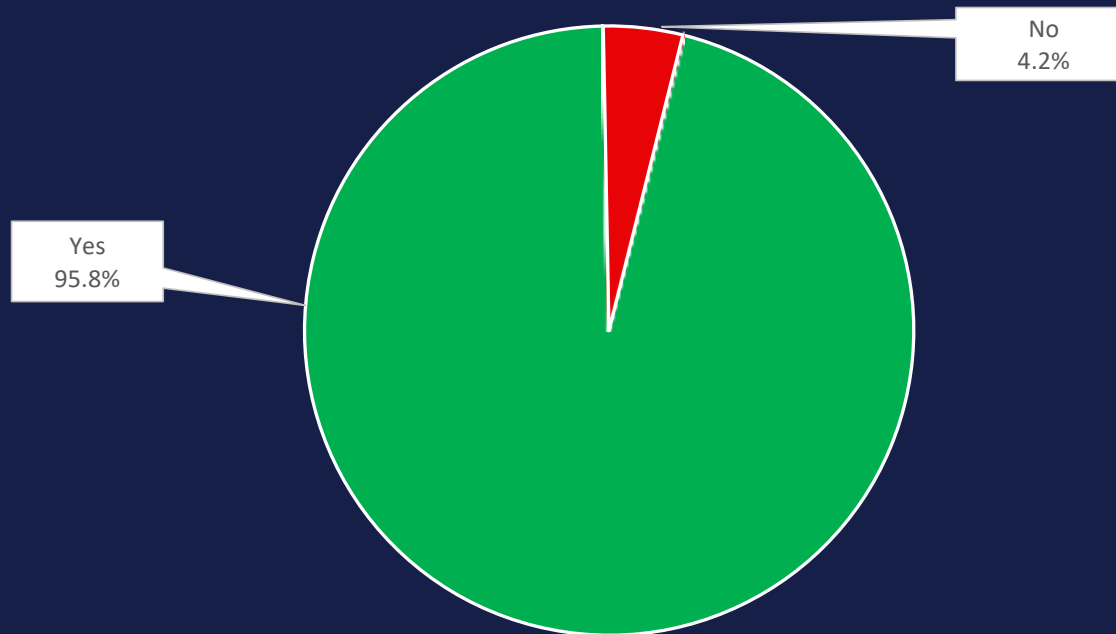


Corporate Travel Policy Survey

Respondent Profile Questions

The logo for 'Travel Well' is located in the bottom right corner of the slide. It features the words 'Travel' and 'Well' stacked vertically in a light blue, handwritten-style font. The background of the slide is a dark blue gradient with a repeating pattern of small, light blue and green geometric shapes, including arrows and dots, at the bottom.

Question 10: Are you a current Uniglobe Travel client?



Question 11: What market are you based in?



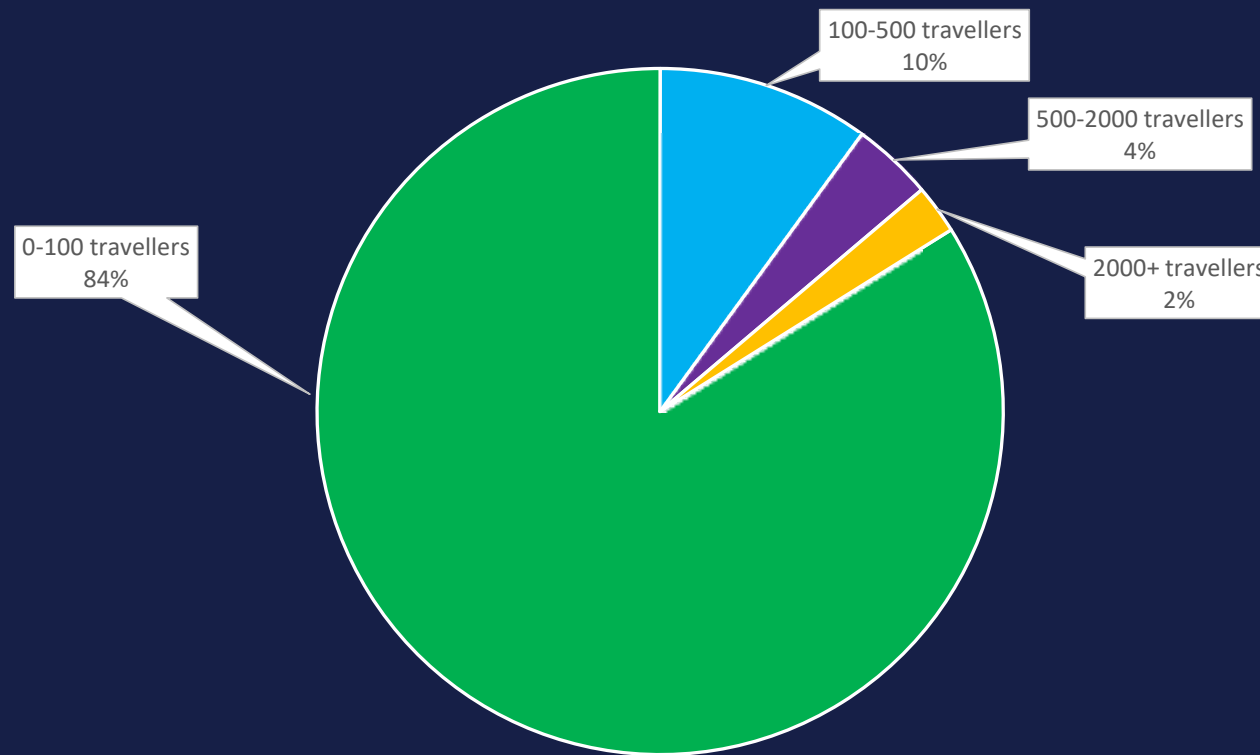
Market	Respondents
Europe	41.6%
North America	30.9%
Indian Subcontinent	15.3%
Asia	7.6%
Africa & Middle East	3.1%
Australia & New Zealand	0.8%
South & Central America and Caribbean	0.8%

Question 12: What markets are you responsible for (relative to where travellers are based)? Select all that apply.

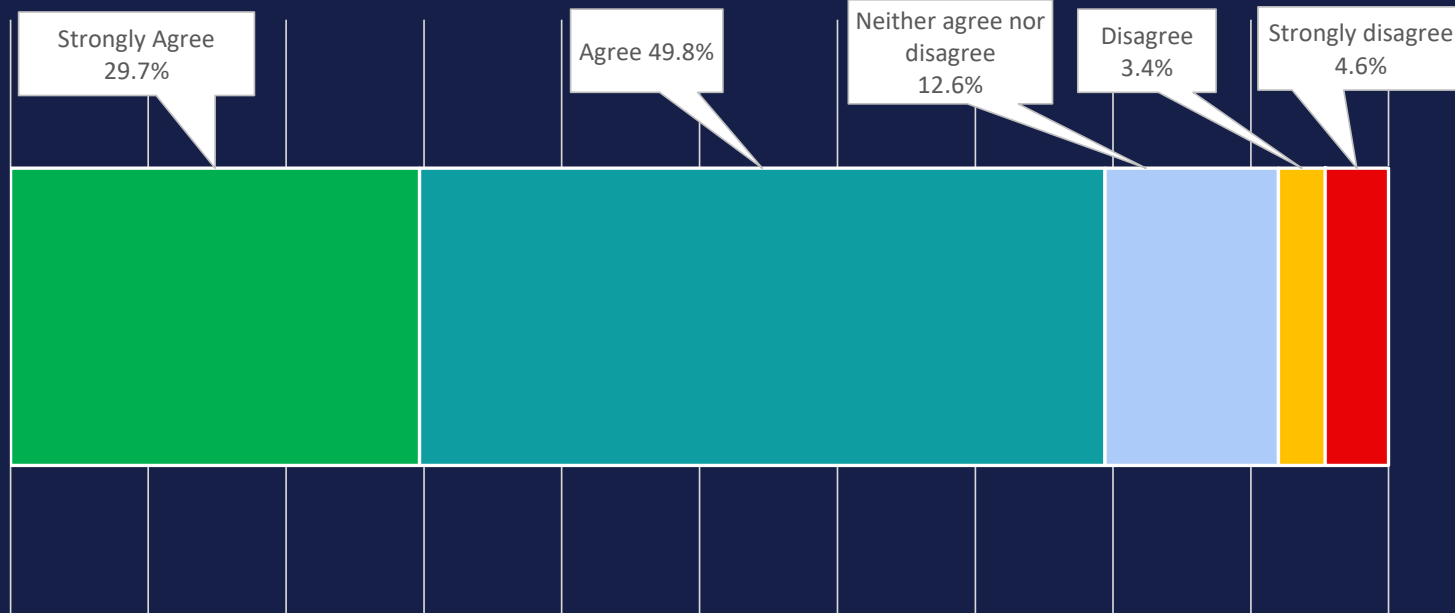


Market	Respondents
Europe	64.5%
North America	53.4%
Asia	41.2%
Indian Subcontinent	32.8%
Africa & Middle East	26.0%
Australia & New Zealand	19.5%
South & Central America and Caribbean	18.3%

Question 13: How many travellers are you responsible for?



Question 14: Thinking about 2019, indicate whether you agree with the following: Business travel was very important to the success of our organization.



Corporate Travel Policy Survey

- For more information on this survey, please contact:
 - Uniglobe Adventure House Travel
 - Ron Dawick, President
 - rdawick@advhouse.com