



Corporate Travel Policy Survey

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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.

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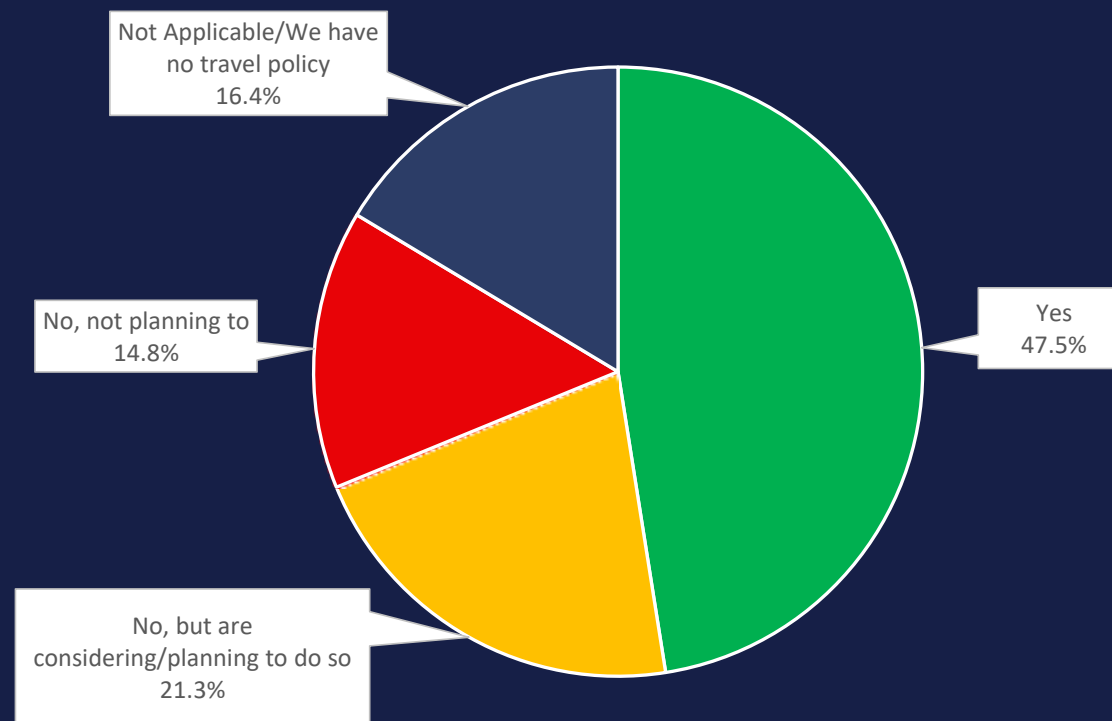
Travel Policy Questions

The logo for "Travel Well" is located in the bottom right corner. It features the words "Travel" and "Well" in a stylized, handwritten-style font, with "Travel" stacked above "Well". The logo is set against a background of a repeating pattern of small, stylized arrows pointing in various directions, creating a grid-like effect.

Key Findings – Travel Policy

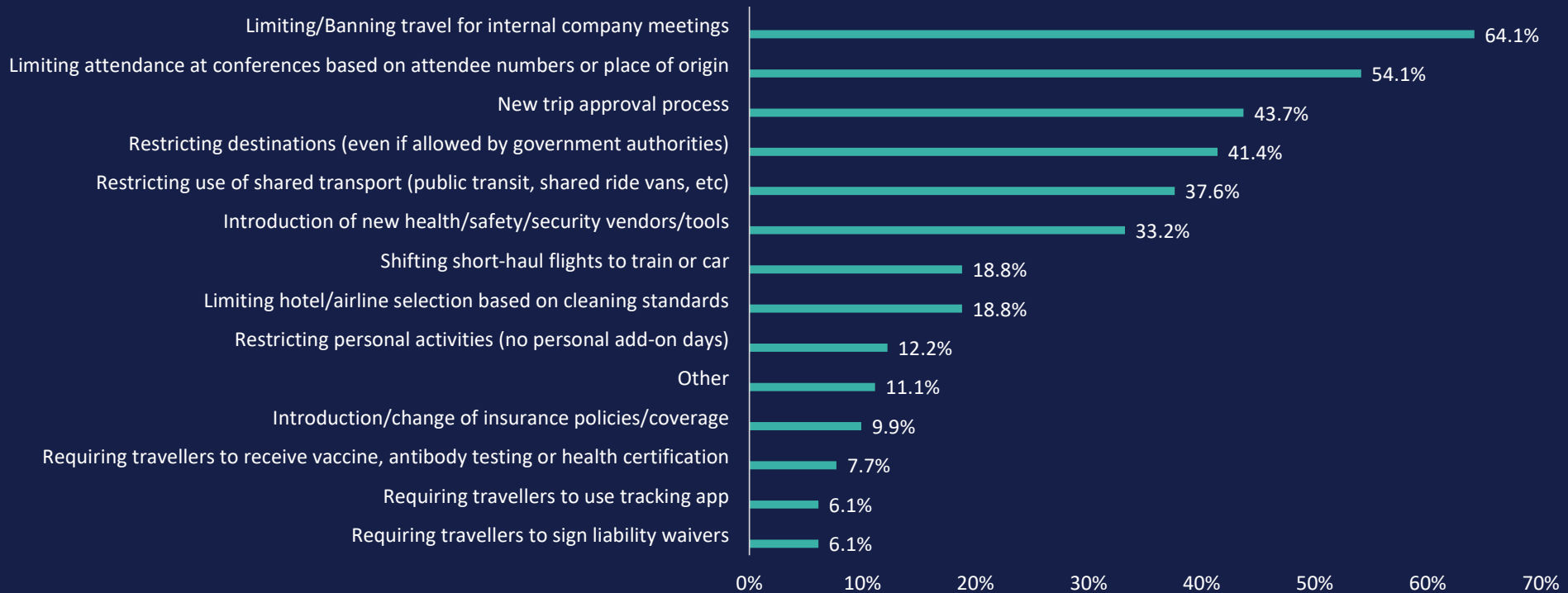
- Europeans are more likely than North Americans to have already updated policy (56% vs 41%). [Ref: Question 1]
- The most common policy changes are limiting or banning travel for internal meetings (64.1%) and limiting participation at meetings/conferences based on attendee numbers or places of origin (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 policies in the next 18 months. [Ref: Question 5]

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



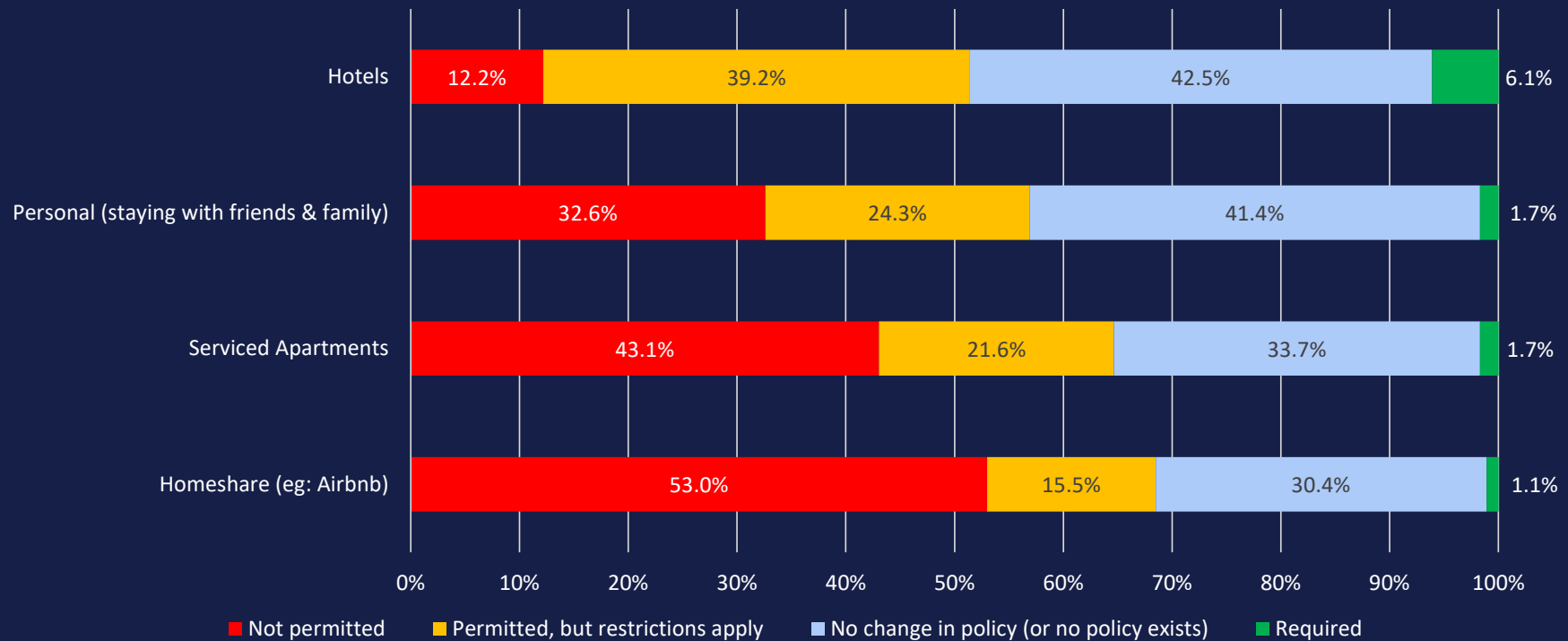
Question 2: What travel policy changes have you made or are considering? (select all that apply)

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

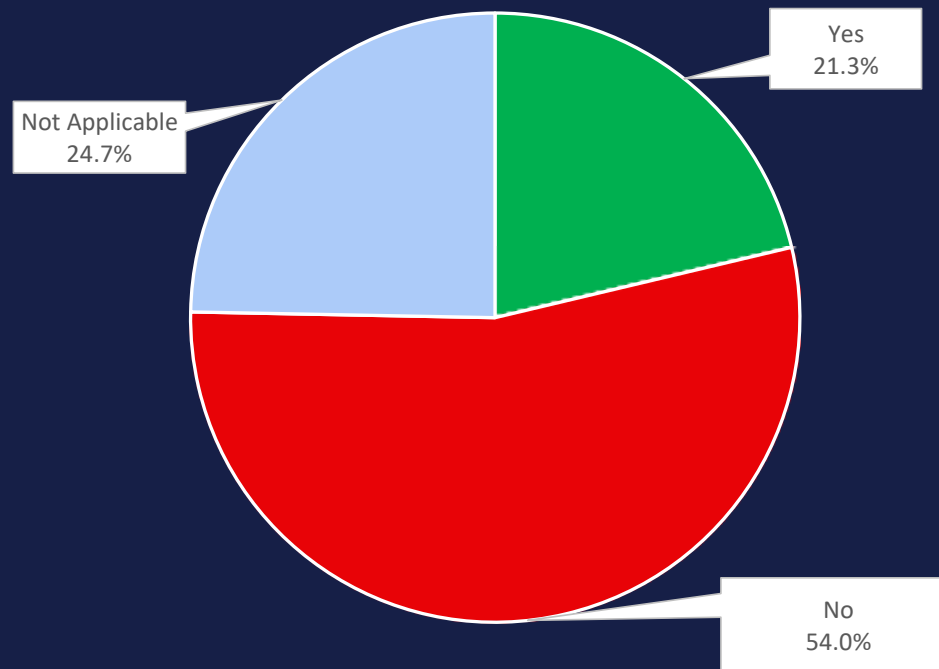


Question 3: What travel policy changes have you made or are considering regarding accommodations?

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

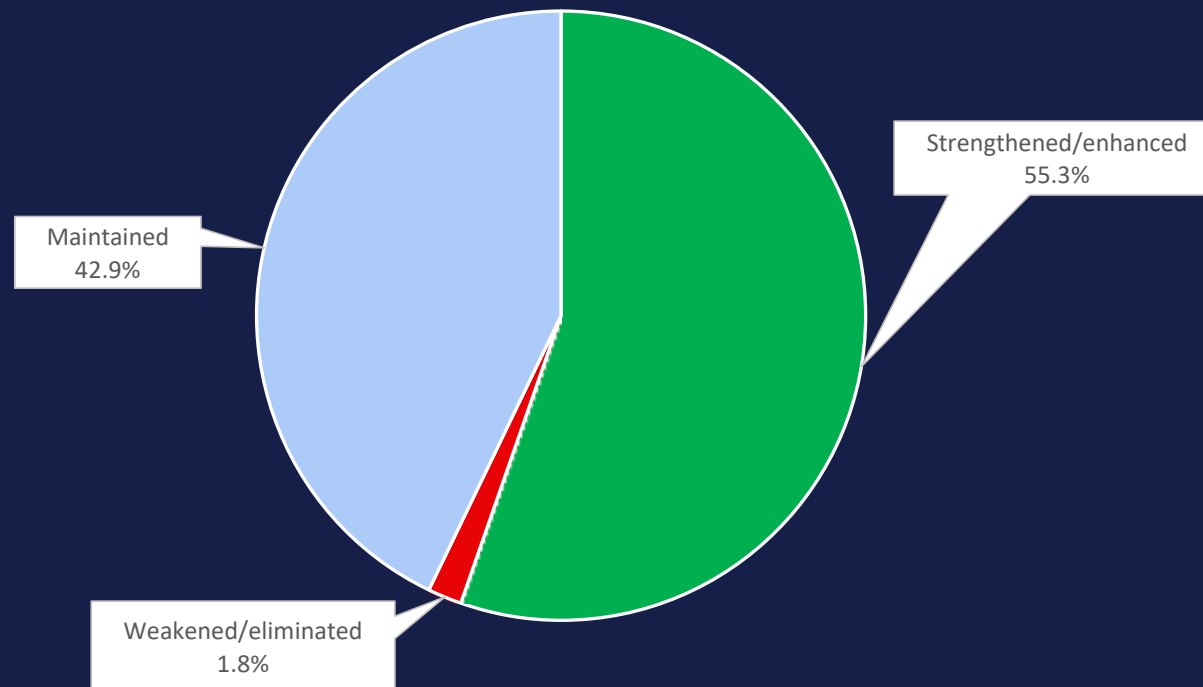


Question 4: Prior to Covid-19, did your policy include any environmental/sustainability considerations or requirements?



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



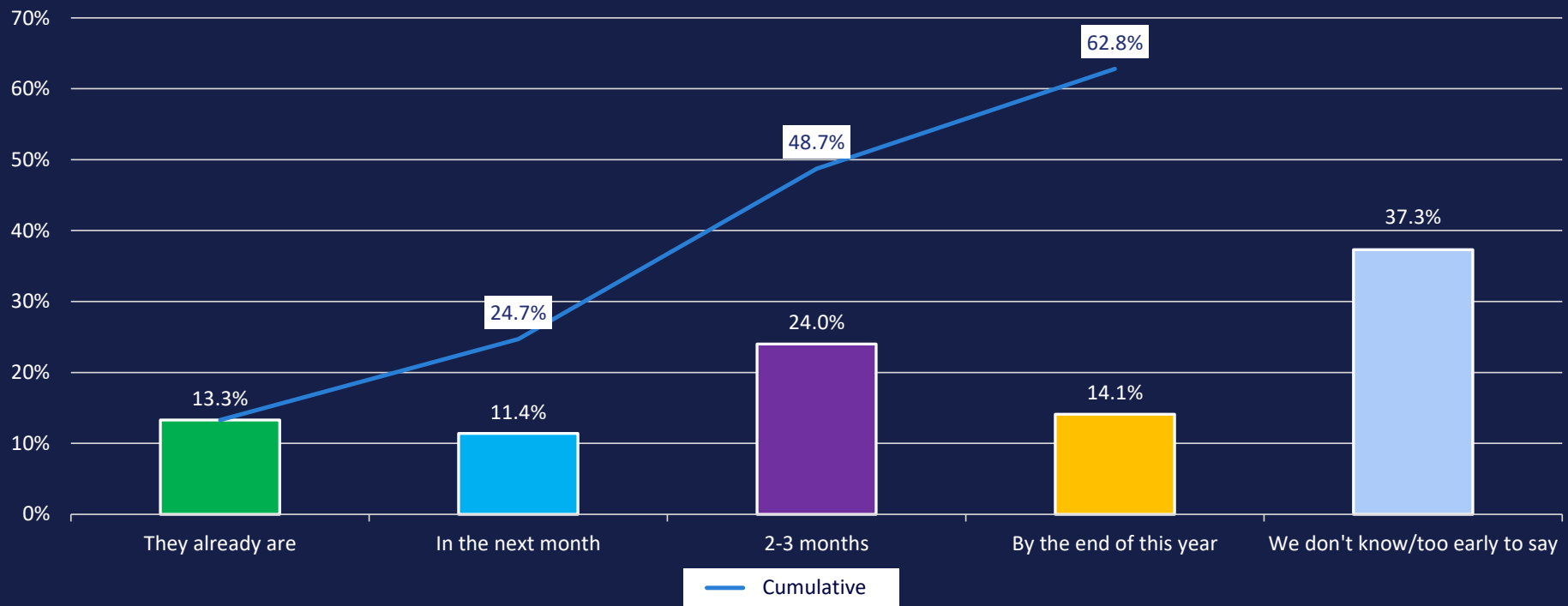
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Travel Restart Questions

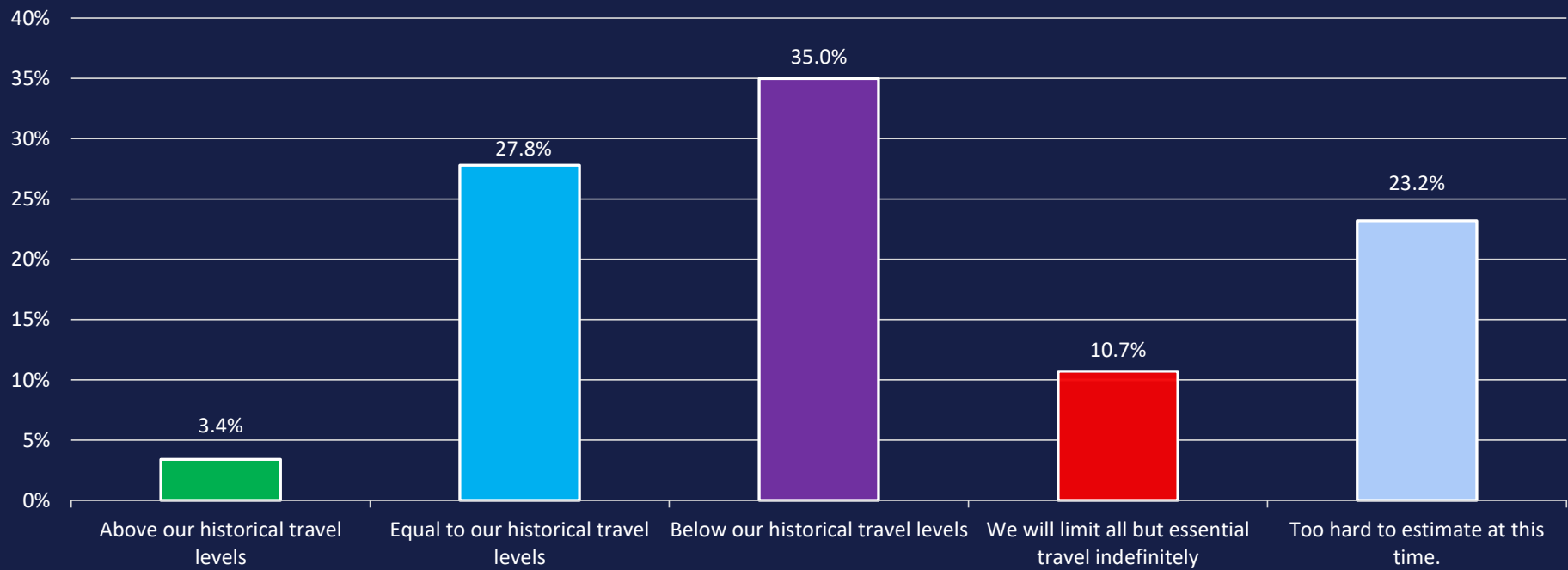
Key Findings – Travel Restart

- 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 expects to see 50% or more of travel to be moved to virtual/video meetings. [Ref: Question 8]

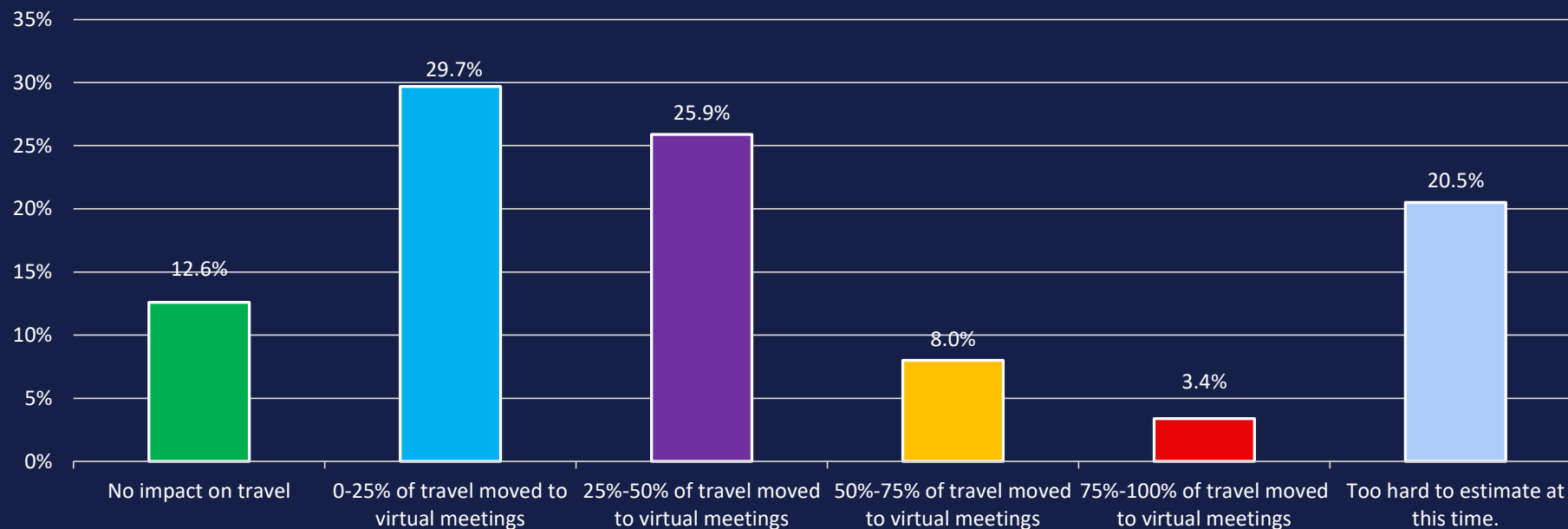
Question 6: When do you expect employees to start travelling for business?



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?



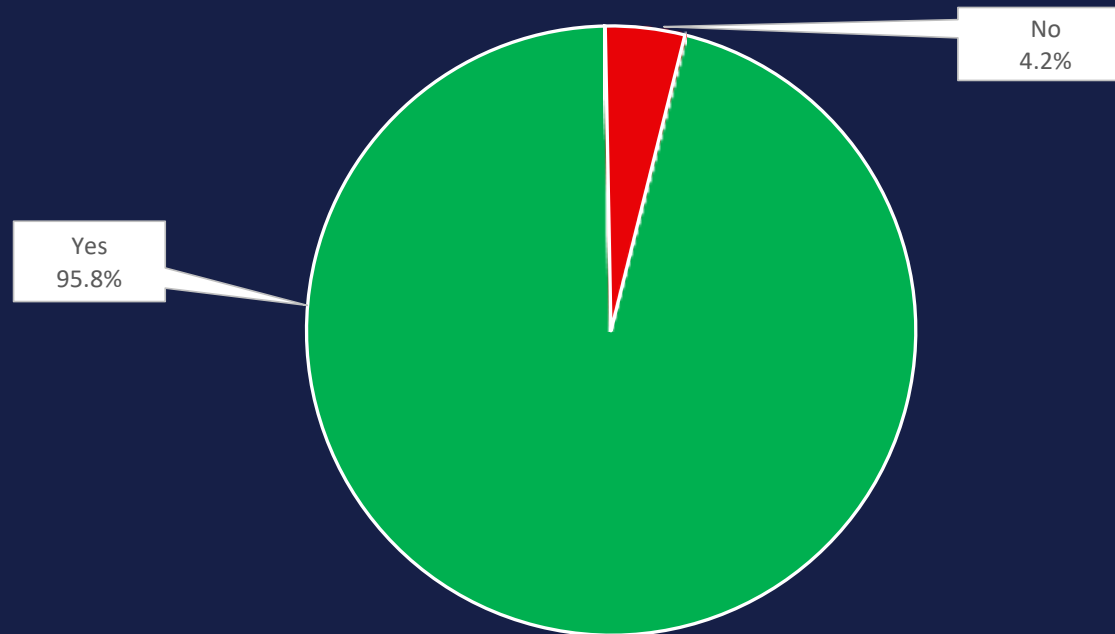
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Respondent Profile Questions



Travel
Well

Question 10: Are you a current Uniglobe Travel client?



Question 11: What market are you based in?

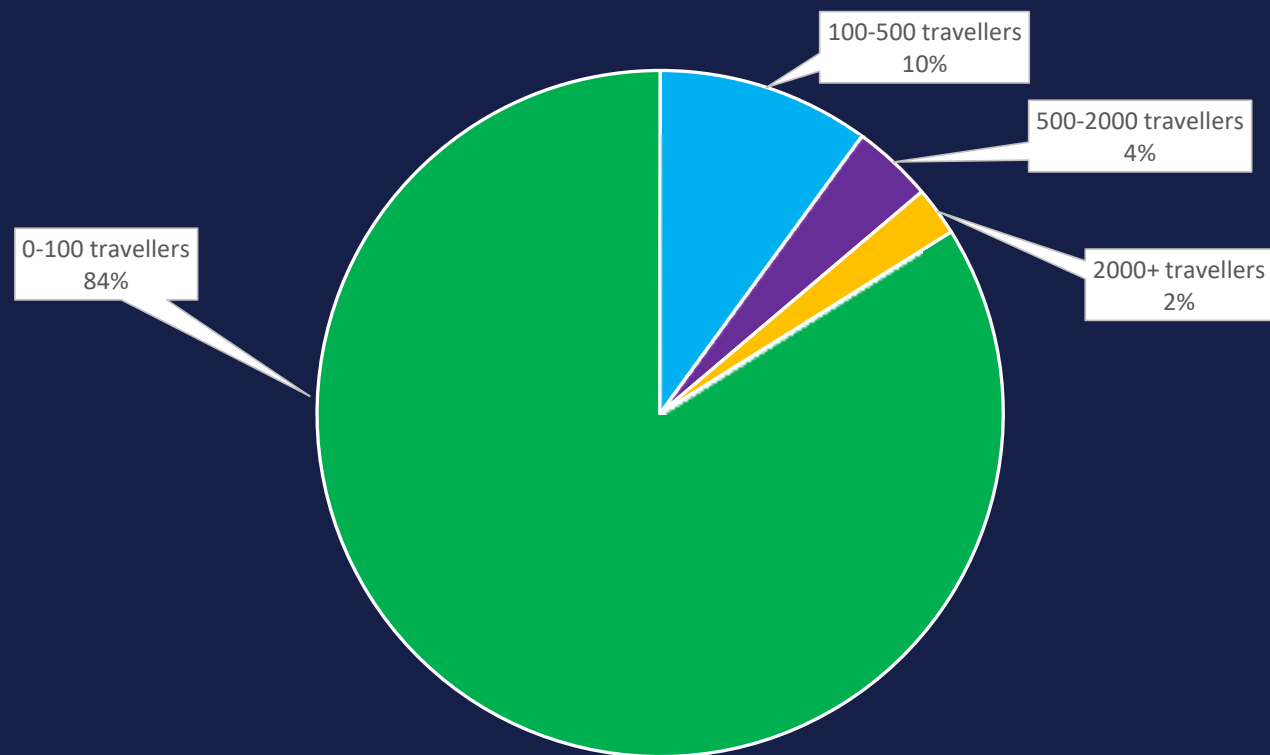


Market	Respondents
Europe	41.6%
North America	30.9%
Indian Subcontinent	15.3%
Asia	7.6%
Africa & Middle East	3.1%
Australia & New Zealand	0.8%
South & Central America and Caribbean	0.8%

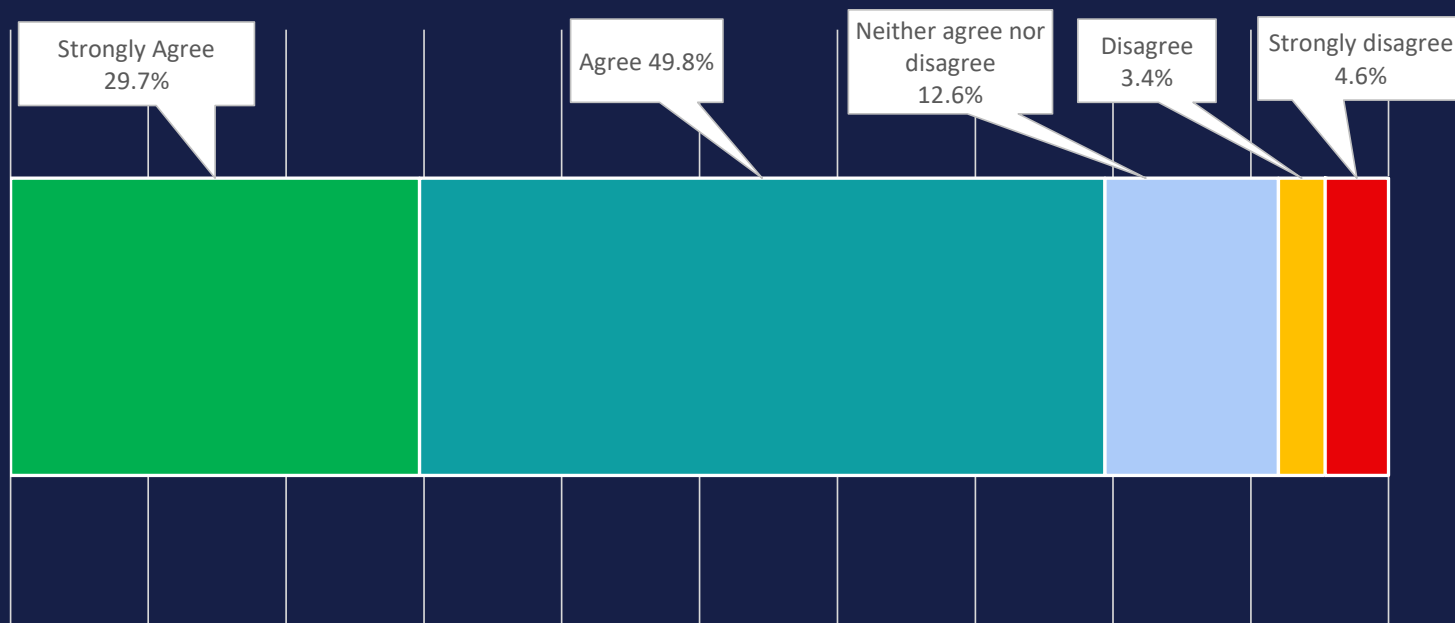
Question 12: What markets are you responsible for (relative to where travellers are based)? Select all that apply.



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.



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- For more information on this survey, please contact:
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