

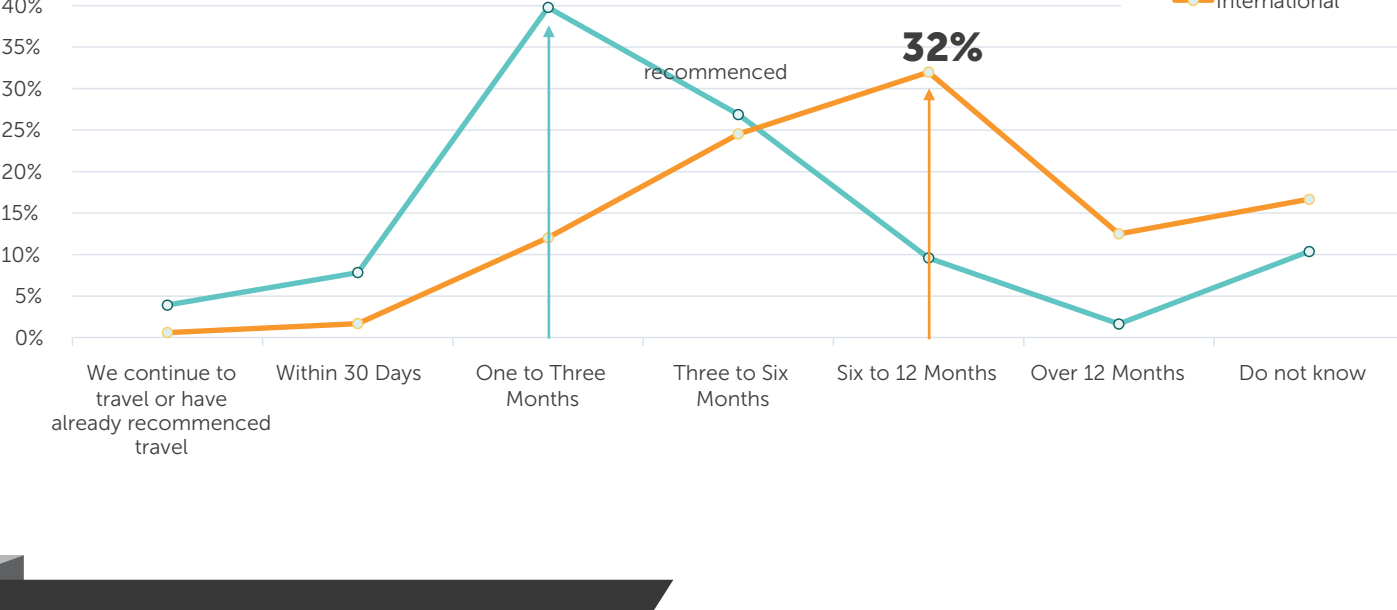
State of the market: A return to global business travel

We asked our customers and clients from around the world to give us their perspective on when travel will return. Over 1600 individuals responded from multiple sectors.

Expectations on Business Travel Resuming

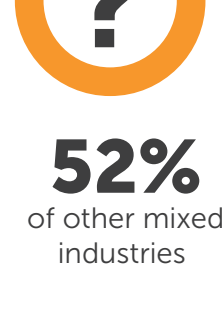
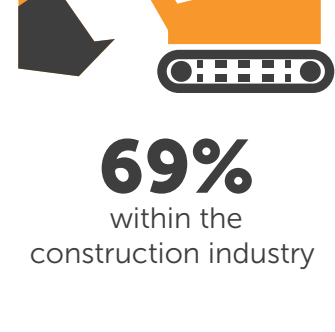


Domestic will lead the business travel recovery



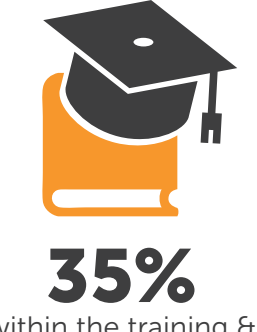
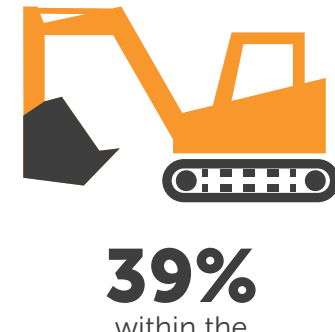
Domestic by top Industries

Within the next three months, these industries have said they will resume domestic business travel



International by top Industries

Within the next six months, these industries indicated they will resume international travel



Information Media and Telecommunications is the most confident industry to resume travel to travel overall with only 6% unsure when international travel would return

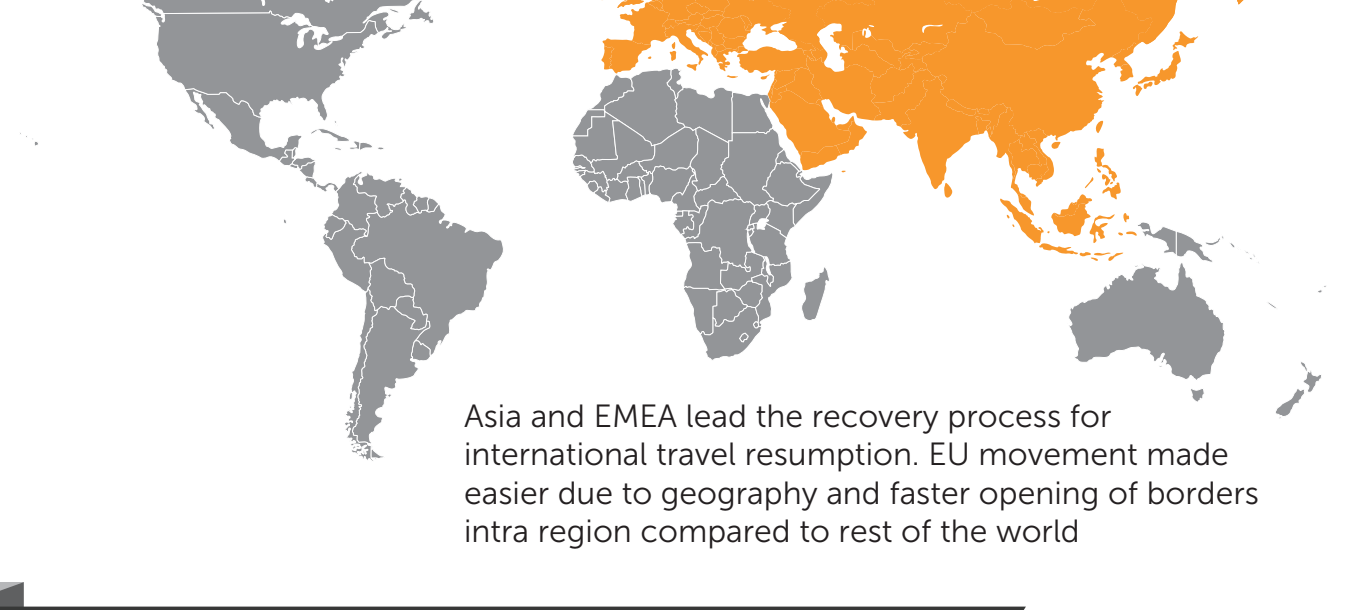
The fastest sector to resume international travel anticipated to be Manufacturing



Domestic by Region

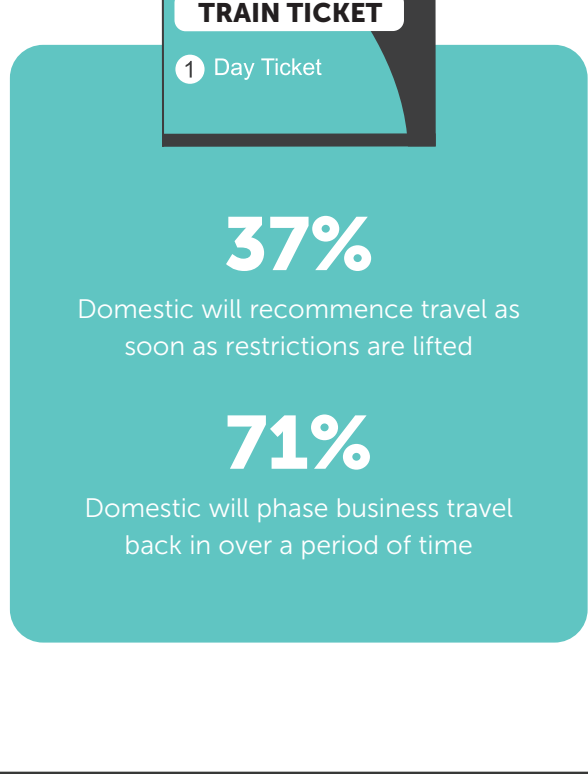


International by Region



Business Travel will come back progressively

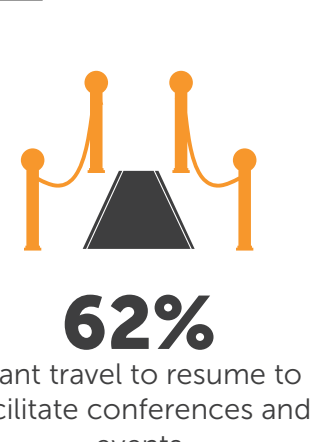
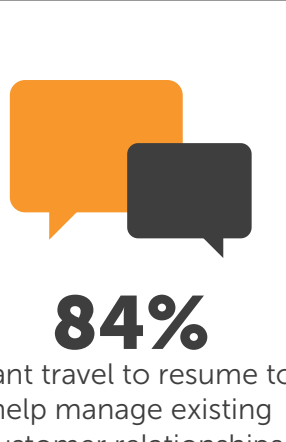
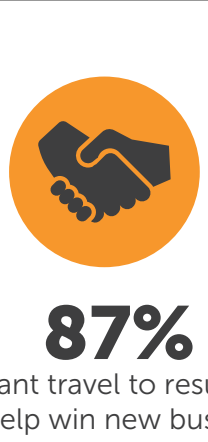
International will recommence travel as soon as restrictions are lifted



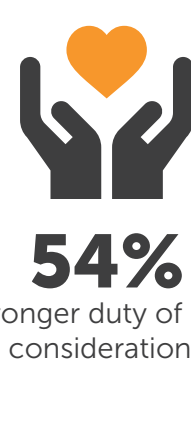
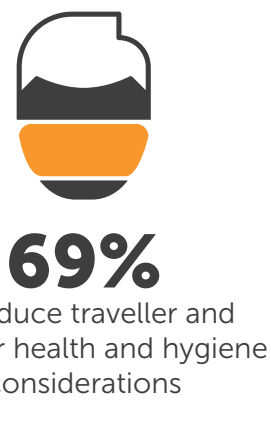
Business Travellers will look to their employer for reassurance



Customers are at the heart of a desire to travel

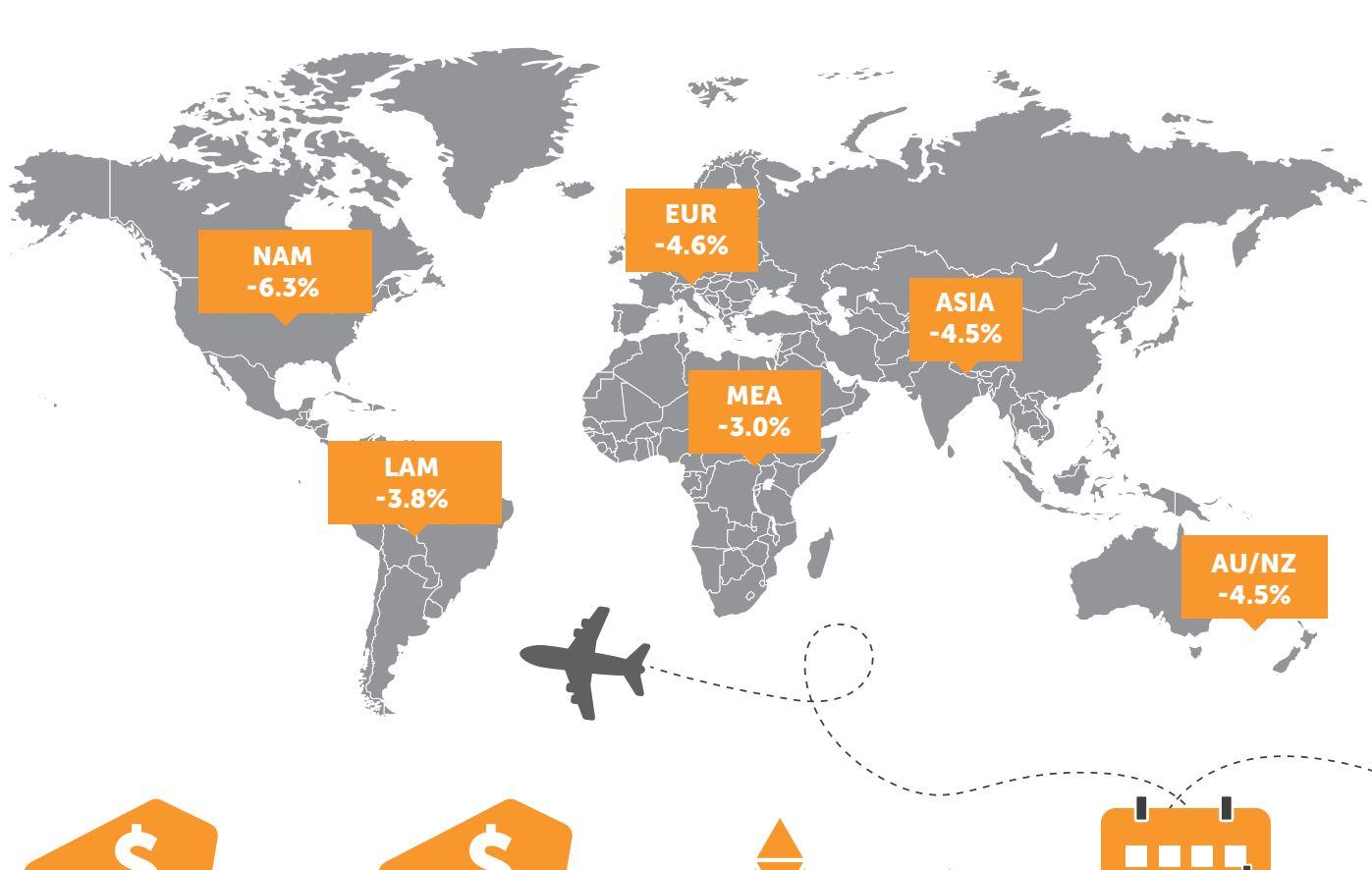


Travel Policies need to adapt to a changed business travel environment



2020-21 Hotel Rate Strategic Shifts

Hotels forecasting rate changes across the region



Rise of domestic guest **Critical** to resuming travel markets

The material and information contained in this report is for general information purposes only. You should not rely upon the material or information in the report as a basis for making any business, legal or any other decisions.

Travellers, Travel Bookers and Travel Managers/Procurement Managers were invited to complete the State of the Market Surveys run by 4D (4th Dimension Business Travel Consulting) during May and June 2020. Survey ratings and comments in responses were consolidated using Clicktools and reported on aggregate responses as to remove identity of respondents. 4D makes no representations or warranties of any kinds, express or implied about the accuracy, reliability, or suitability with response to the report and related graphics contained in the report for any purpose. Any reliance you place on such material is therefore strictly at your own risk.