



The “new Normal” in Business Travel in COVID-19 times and then

RELAUNCHING BUSINESS TRAVEL


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EUROPE AND APAC RESTART AGAIN


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Who we are

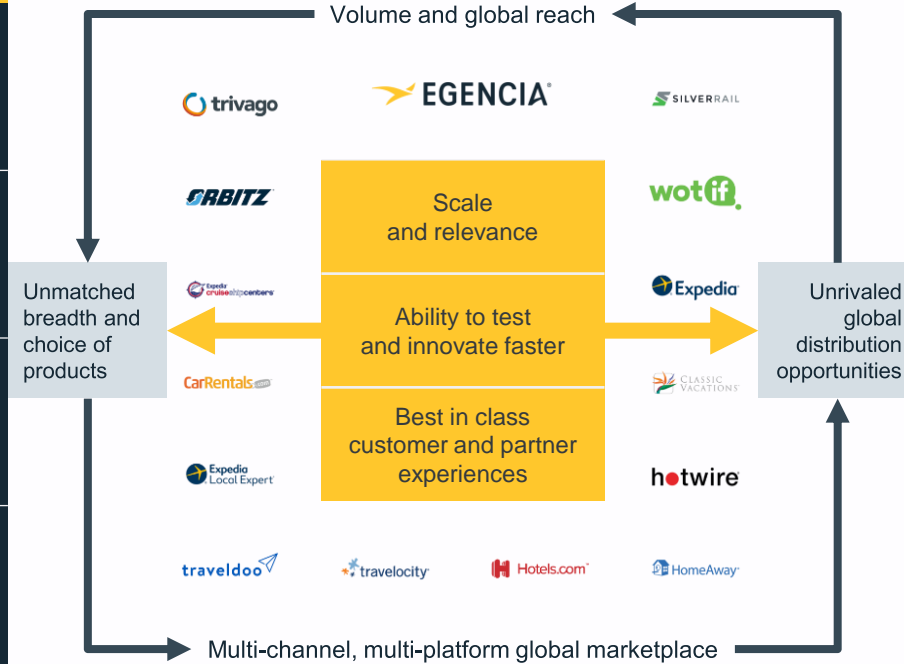
High volume and diversity of demand

 **+\$75B**
Gross bookings (2019)


 **+675M** Monthly visits
in **+75** countries


 **+1.8M** Active
corporate travelers

 **+60M** Contacts
handled annually




Broad and diversified supply

+895K
Properties 

+1.8M
Vacation rentals 

+550
Airlines 

+150
Car rental companies 

Covid19 what is the situation today?

EUROPE AND APAC RESTART AGAIN

- **Travel bans** still remain in place
- A **local re-opening** in most European countries and China but still the risk of a second wave remains – currently Peking
- Utilising local teams to **visit suppliers**
- **Work from Home** Policies
- Setting teams up with the **right technology**
- Board-level sign offs for any **travel considered critical**

GBTA (Global Business Travel Association) Survey

Thinking about your company, how has the coronavirus impacted business travel to...?



99%

of companies have canceled or suspended **most** (13%) or **all** (86%) trips to China



97%

of companies have canceled or suspended **most** (22%) or **all** (75%) trips to European countries



94%

of companies have canceled or suspended **most** (26%) or **all** (68%) trips to Canada



97%

of companies have canceled or suspended **most** (22%) or **all** (75%) international trips



97%

of companies have canceled or suspended **most** (17%) or **all** (80%) trips to other APAC countries (e.g., Japan, S. Korea, Singapore, Malaysia)



96%

of companies have canceled or suspended **most** (18%) or **all** (78%) trips to Latin America



90%

of companies have canceled or suspended **most** (36%) or **all** (54%) trips to the United States



88%

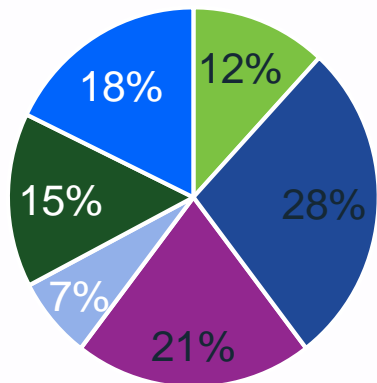
of companies have canceled or suspended **most** (42%) or **all** (47%) domestic travel within their own country

Members of GBTA (Survey Results from May 2020)

THE GENERAL CONSENSUS

61% or 3 in 5

Companies are planning for a recovery in the Next 6 Months...



- Within one month
- Within 3 months
- Within 6 months
- Within 8 months
- In 2021
- Don't know

Covid-19: What happens when a team can't travel?

PROCUREMENT ACTION

1

What immediate steps did **procurement** take around travel ?

2

What's the situation **today**?

3

What comes **next**?



Airlines

Restarting in June 2020

A matter of urgency

Aviation:



Finding the demand to meet that capacity : Confidence

Airline cabins have not been shown to be "super-spreading" environments for Covid-19.

IATA reports of long-haul flights with symptomatic passengers onboard show there were no confirmed secondary cases among other passengers.

An informal survey of 70 airlines did not reveal any cases of suspected passenger-to-passenger transmission of the virus.



- *Blocking out seats to space out*
- *Selling flights with load factors of 67%*
- *Facial coverings*
- *Introducing health questionnaires,*
- *Temperature checks and even on-the-spot testing for Covid-19.*

The new Normal is influenced by:

Government

- Countries out of **lockdown**
- **Travel bans lifted**
- **Medical guidelines** in place
- **Quarantine** restrictions lifted

Traveller

- Business case to travel
- Traveller **confidence**
- Appropriately briefed
- **Able to book**
- Trend to more **digital and innovativ**

Recovery:
What needs
to be in
place?

Supply Chain

- Suppliers operational e.g. **hotels open; flights running**
- **Social distancing** and sanitation protocols in place
- **Distribution channels** carrying current inventory

Corporate

- **Business need to travel**
- **Travel policy** to assess risk for travel
- Liability waiver
- Confidence in **traveller safety**
- **Traveller kit** (e.g. masks etc.)

How does Egencia support their clients during COVID-19

OPPORTUNITIES WE FACED

- New Product updates e.g. **Mobile APP**
- **COVID-19 reporting** was implemented on an international and industry basis
- **Cancellations and Re-bookings** implemented and monitored
- **Recovery packages** for alternative accommodations once hotels were shut down
- **Conditions around travel** e.g. load factors compromising business viability

EGENCIA SUPPORTED WITH

- **Global Customer Service** – client drive increased demand e.g. cancellation
- **Travellers return...**with Expedia together
- All our **Travel Consultants** were able to work from home within 24hours
- Provided the latest Information and Updates **in travel and restrictions**
- Trend to **more digital and innovativ**



Egencia supports the Redesign on four key areas

1. Goals

- **Define your new goals** e.g. Risk Management, Spend and Savings, Sustainability

3. Policy

- **Analyze your Policy** e.g. Approval, Policy on the go, Trip Duration



2. Analyze

- **Analyze your performance** e.g. Policy and compliance, Leakage, Benchmarking

4. Redesign

- **Redesign your travel program** e.g. Travel Strategics/ Analytics

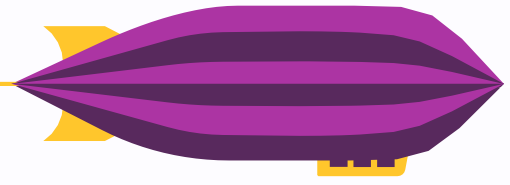
Tips on the Redesign for your Travel Policy and Programme

Travel Policy Documents	OBT / Egencia Setup
Supplier Agreements	Risk Management
Expense Guidelines	Monitoring and Reporting Processes

- Is your **travel policy document** easily accessible and up-to-date?
- Have you revised your preferred hotels and locations on **Egencia** recently?
- Do you have a strategy on how to handle the expiry and renewal of **supplier agreements**?
- Are you prepared for the necessary, active **risk management** in the new environment?
- Do your **expense guidelines** cover new hygienic measures and expenses?
- Can you manage the “unfreeze” of travel with your existing **monitoring and reporting processes**?



Thank you!



**For any Questions
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