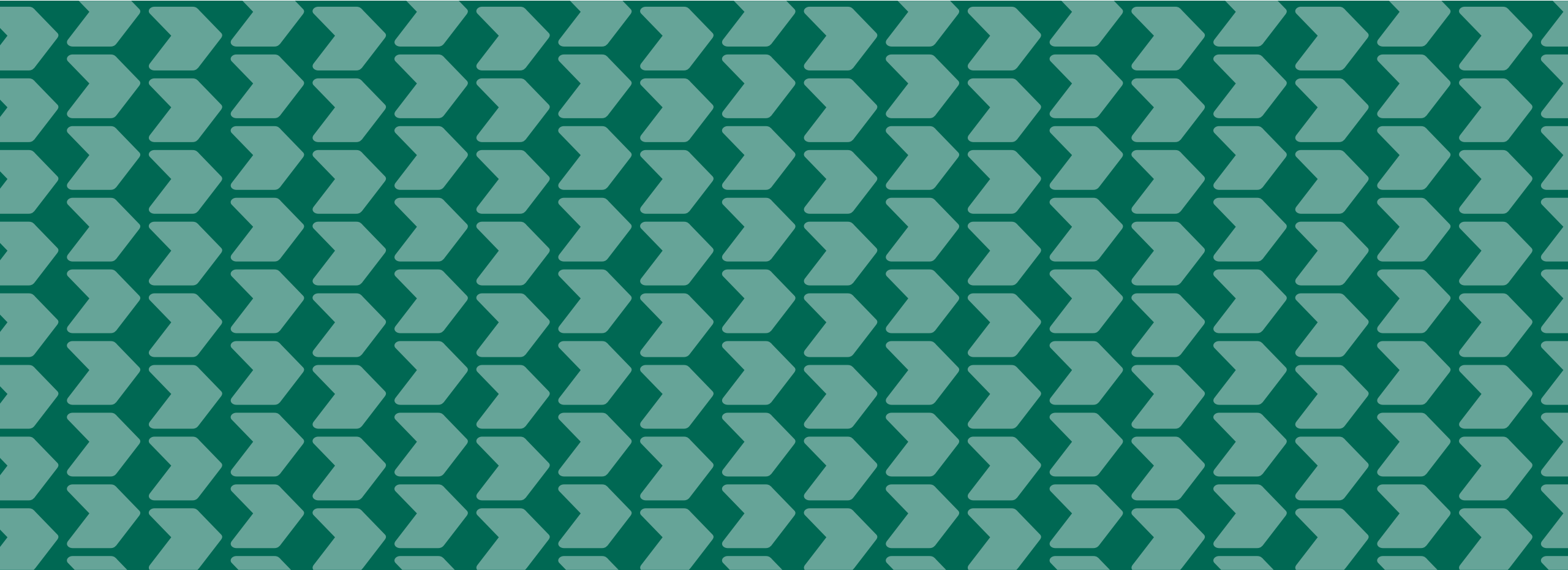# BTA Survey Analysis

Research background

▸ **Purpose:** A joint DfT/BTA survey was sent to BTA members to explore changes, expectations and projections of future business travel and the effect Covid-19 has had on these aforementioned points.

▸ **Survey:** The 10-minute survey was sent to BTA members. The questions focused on a spectrum of insights to understand how Covid-19 impacted travel.

▸ **Background:** Few sectors have been hit as hard as the Travel Sector during the Covid-19 Pandemic. This analysis aims to explore the extent to which businesses who use air travel for business (members of the Business Travel Association) have been impacted by the Covid pandemic.

Key research questions

1. What were the Business Travel patterns over the 2019 period?

2. What was the impact of COVID-19 on Business Travel plans i.e., how did businesses respond to COVID-19 and the associated travel restrictions?

3. Has COVID-19 and the associated restrictions resulted in a change in travel patterns for Businesses?

4. What factors affect Business Travel confidence the most?

5. How confident is the Business Travel Community in future air travel?

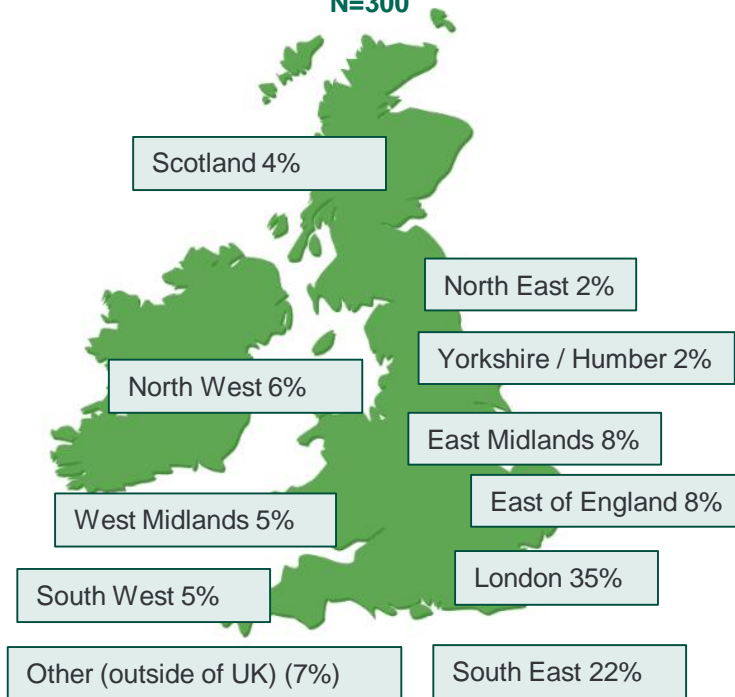6. What are the Travel projections post COVID-19 pandemic?

Please note that while the initial headline findings have been included in the published GTT report, this further analysis did not form part of the GTT report.

Methodology and Sample

Head office location (%)
N=300

Scotland 4%

North East 2%

Yorkshire / Humber 2%

North West 6%

East Midlands 8%

West Midlands 5%

East of England 8%

South West 5%

London 35%

Other (outside of UK) (7%)

South East 22%

Industry sector (%)
N=300

Sector	%
Professional, Scientific & Technical Activities	19
Manufacturing	18
Information, Communication and Technology	15
Financial and Insurance Activities	13
Wholesale and Retail Trade	8
Human, Health and Social Work Activities	5
Education	4
Transportation and Storage	4
Construction	3
Tourism and Leisure	1
Other	11

Organisation size (%)
N=300

- 6 — More than 10,001 employees
- 38 — Between 250-10,000 employees
- 55 — Between 1-249 employees

Total sample size: n=300

The BTA sent the survey out to their members with an accompanying letter from DfT and BTA that outlined the purpose and nature of the survey. The 10-minute survey ran from 30/09/2020 to 21/10/2020. Quotas were not applied, and the data was not weighted. The survey was sent to around 750 businesses and 300 responses were received.
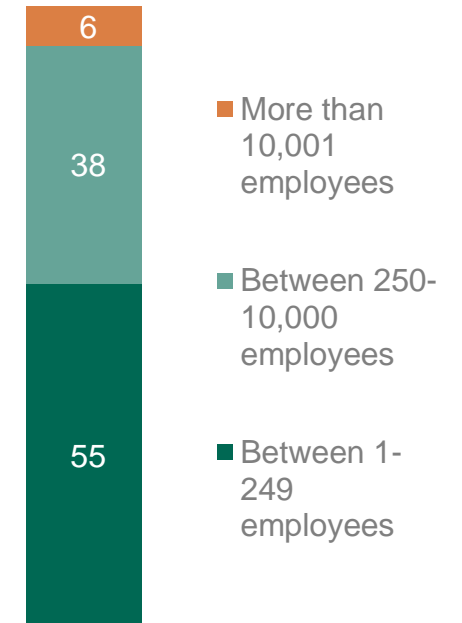
How did businesses respond to the Covid pandemic?

Business Travel Association - Summary Presentation
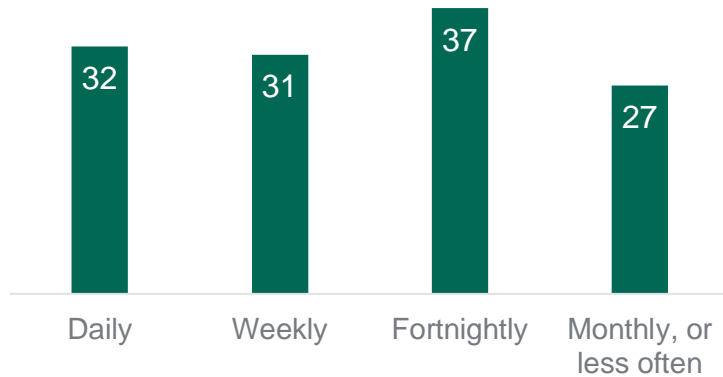
Moving Britain Ahead

Before Covid, businesses typically travelled by air frequently, to a wide range of routes, and several other modes in addition to flight

Frequency

In 2019, how often did your company use air transport as a form of business travel? (%).
N=300

| Daily	Weekly	Fortnightly	Monthly, or less often
32	31	37	27

- Over 6 in 10 (63%) used air transport for business travel at least once a week.
- Large businesses, and ICT businesses were more likely to fly more often than other businesses (flying daily: ICT 38%; large businesses 51%).

Routes

In 2019, what routes did your business travel by air for? (%).
N=300

| Europe / North Africa	North America	Asia	Rest of World	Domestic
93	74	70	67	55
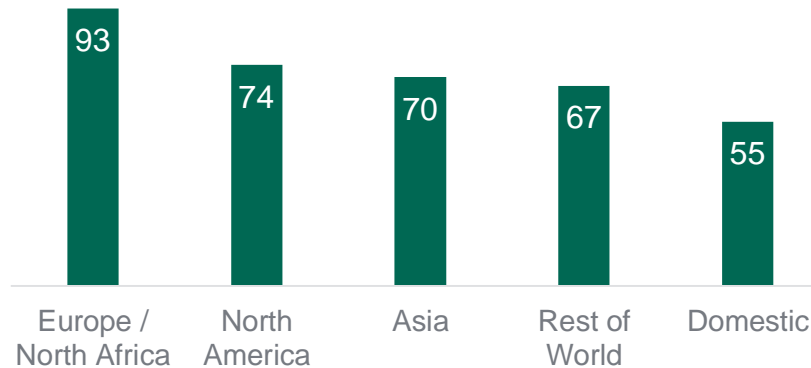
- In 2019, almost all businesses (93%) flew short haul, within Europe or to North Africa.
- Around 70 percent of companies flew to a long-haul destination (North America, Asia, or Rest of World).
- Just 55% flew within the UK.

Which other modes used

In 2019, how often did your business use a form of transport other than air travel for business? (%). N=300

| Rail	Private Taxi	Car	Ferry	Bus/ Coach	Other
94	66	64	17	8	4
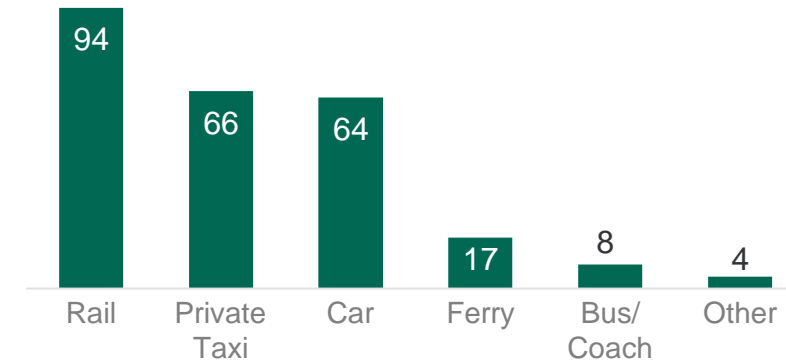
- In 2019, almost all businesses (94%) were already using rail, as well as flying, for their business travel.
- About 2 in 3 used cars or private taxis for business travel.

NOTE: Sample size for most sectors were too small to analyze each individual sector. The sectors that could be compared were *Information, Communication and Technology (ICT)*, n=46, *Professional, Scientific and Technical Activities* (PST) n=57 and *Manufacturing, n=57*. However, these bases sizes are low and care should be taken when interpreting these findings.
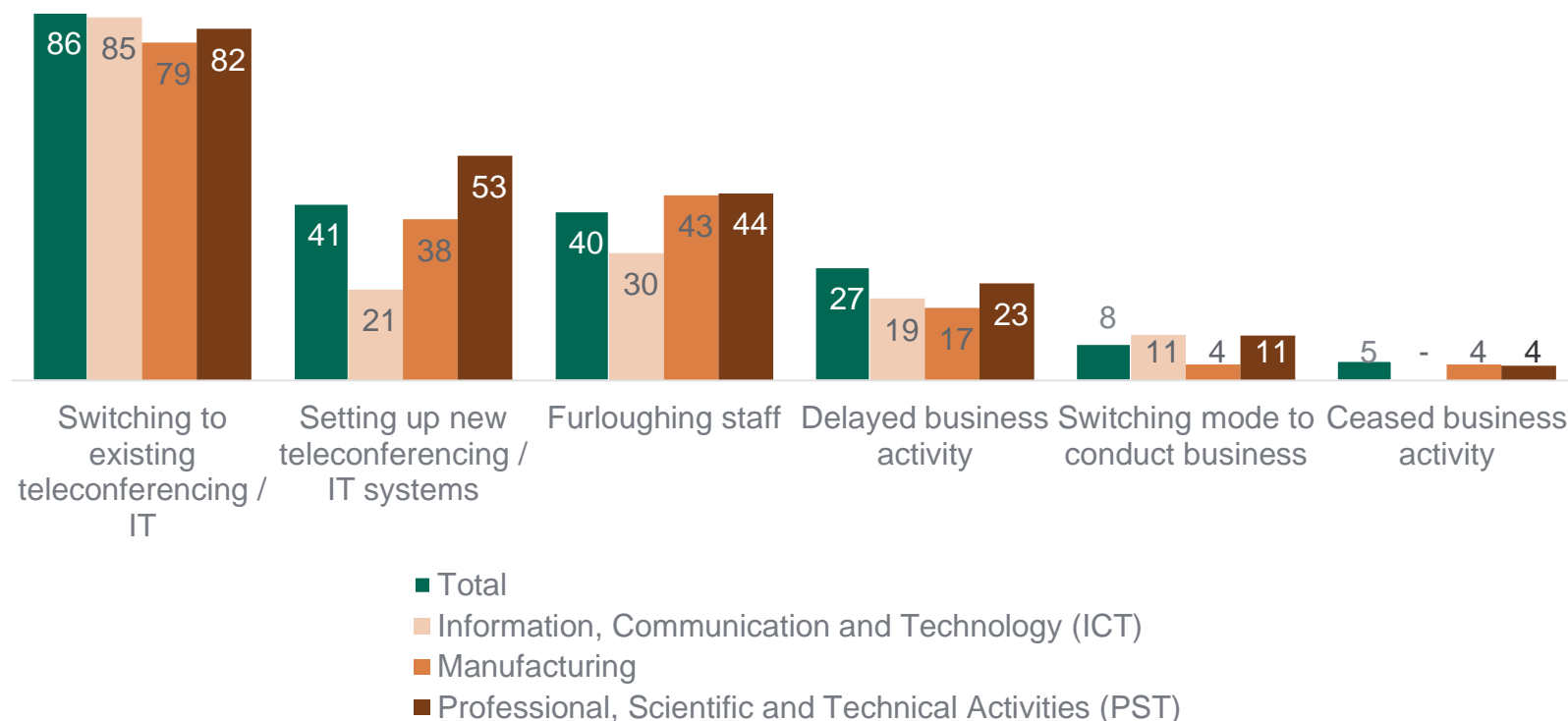
Businesses experienced disruption due to Covid-19; many switched to existing teleconferencing systems or furloughed staff
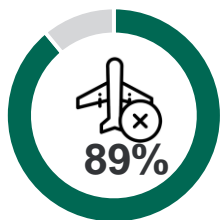
89% of businesses cancelled/suspended all business trips in the 3 months following 17th March. N=300

- 86% of businesses were able to switch to existing teleconferencing systems; and 41% set up new teleconferencing systems to fit their needs.

- Businesses were varied in their response to the pandemic: PST businesses were much more likely to set up new teleconferencing systems (53%), while ICT organisations were much less likely to do so (21%).

- 40% furloughed staff, and ICT organisations were much less likely to furlough staff (30%).

- Only (8%) switched mode (e.g., more car or rail use) to conduct business.

How did your business respond to the FCO advice in the 3 months following 17th March? (%).
N=283, n~50 per organisation type

	Total	ICT	Manufacturing	PST
Switching to existing teleconferencing / IT	86	85	79	82
Setting up new teleconferencing / IT systems	41	21	38	53
Furloughing staff	40	30	43	44
Delayed business activity	27	19	17	23
Switching mode to conduct business	8	11	4	11
Ceased business activity	5	-	4	4

- Total
- Information, Communication and Technology (ICT)
- Manufacturing
- Professional, Scientific and Technical Activities (PST)

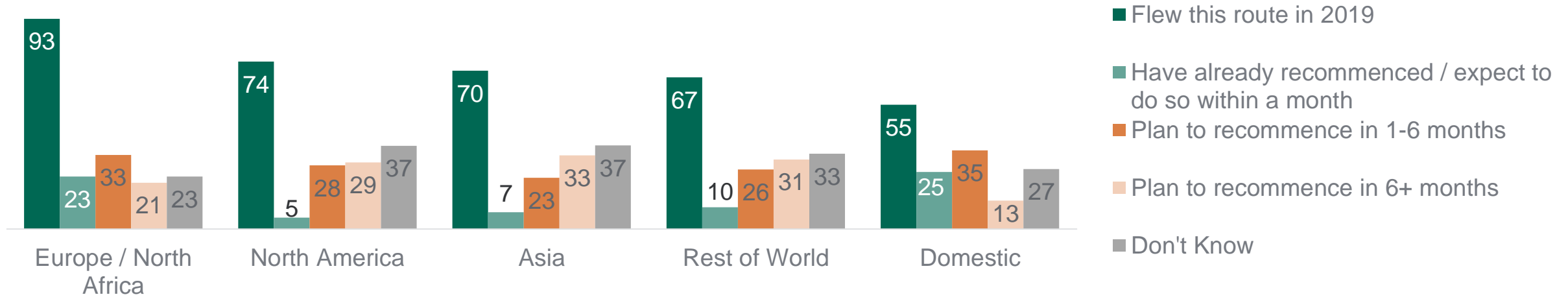How confident do businesses feel about returning to air travel?

Some bookings are beginning to return, primarily for domestic and short haul (Europe / North Africa)

Routes flown in 2019 vs expected recommencement of these routes:
In 2019, what routes did your business travel by air for? When does your business expect to re-commence a business trip by air to each of the following regions?
Base: those who flew this route in 2019, excluding those stated not applicable at this question (n~250)

Legend:
- Flew this route in 2019
- Have already recommenced / expect to do so within a month
- Plan to recommence in 1-6 months
- Plan to recommence in 6+ months
- Don't Know

Europe / North Africa: 93, 23, 33, 21, 23
North America: 74, 5, 28, 29, 37
Asia: 70, 7, 23, 33, 37
Rest of World: 67, 10, 26, 31, 33
Domestic: 55, 25, 35, 13, 27

- 23% of businesses that flew short haul (Europe/North Africa) in 2019 have either recommenced flying this route or expect to do within in a month.

- A similar proportion of businesses that flew within the UK have either recommenced domestic flights or expect to do so within a month.

- There is more uncertainty about flying long haul: about 4 in 10 of those who flew to a long-haul destination in 2019 (North America, Asia, or Rest of World) state that they don't know when they'll recommence these flights, and about 3 in 10 expect to recommence these flights in more than 6 months time.

Government restrictions and employee willingness are the main considerations businesses have when it comes to future flight

Aspects that businesses will consider important when planning future air travel (%).
N=300. Top 10 shown, all others were mentioned by <5% of businesses.

Aspect	Value
Government easing of travel restrictions	54
Employee willingness to travel	52
Covid-19 safety measures	44
No requirement for quarantine	40
Rate of infection	30
Vaccine produced for Covid-19	21
Airport Covid-19 testing	16
Improved flexible travel options	8
Cost of the ticket	7
Financial stability of own company	7
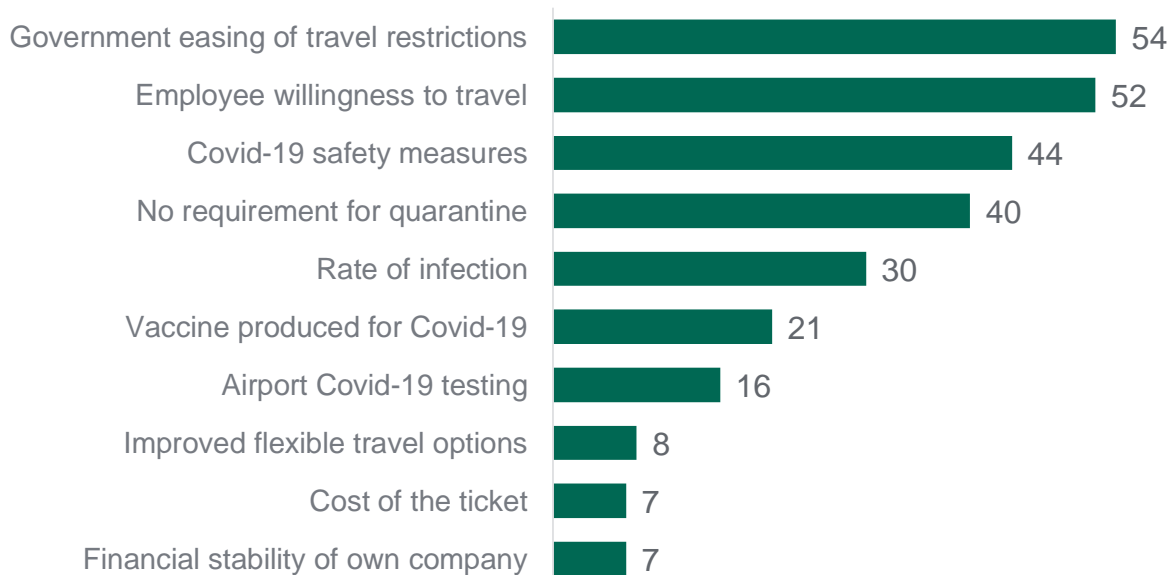
A small number of businesses (n=46) provided further comments at the close of the survey. The themes of these other comments are below:

Adaptation of business practice to provide alternative to face-to-face meetings

Avoidance of quarantine on arrival, e.g., through airport testing or vaccinations

A desire for more international cooperation between countries

Changing government policies seen to inhibit travel feasibility

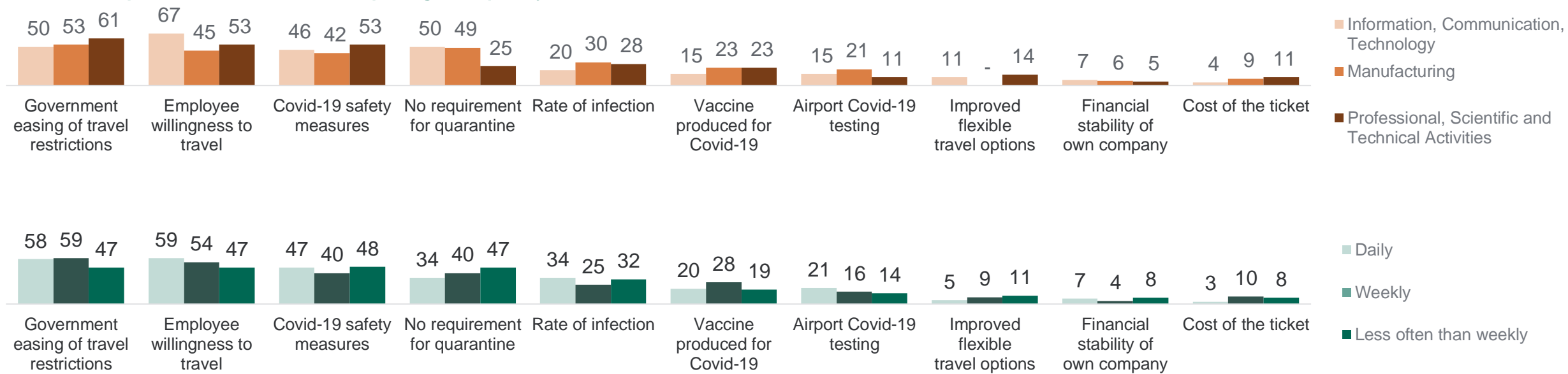*Organisational duty of care when employees traveling abroad, e.g., low infection rates*

- Businesses demonstrated a wide range of concerns they would need to take account of when planning future flights.

- For businesses overall, the top three most important aspects considered by companies include government easing of travel restrictions (54%); employee willingness to travel (52%) and Covid-19 safety measures (44%).

When planning future air travel, Government restrictions, employee willingness to travel, and Covid-19 safety measures are the top concerns for all businesses

Aspects that businesses will consider important when planning future air travel, by sector and frequency of flying in 2019 (%). Top 10 shown.
Base n~50 per business sector, n~100 per flight frequency

Legend (chart 1): Information, Communication, Technology; Manufacturing; Professional, Scientific and Technical Activities

Category	ICT	Manufacturing	Professional, Scientific and Technical
Government easing of travel restrictions	50	53	61
Employee willingness to travel	67	45	53
Covid-19 safety measures	46	42	53
No requirement for quarantine	50	49	25
Rate of infection	20	30	28
Vaccine produced for Covid-19	15	23	23
Airport Covid-19 testing	15	21	11
Improved flexible travel options	11	-	14
Financial stability of own company	7	6	5
Cost of the ticket	4	9	11

Legend (chart 2): Daily; Weekly; Less often than weekly

Category	Daily	Weekly	Less often than weekly
Government easing of travel restrictions	58	59	47
Employee willingness to travel	59	54	47
Covid-19 safety measures	47	40	48
No requirement for quarantine	34	40	47
Rate of infection	34	25	32
Vaccine produced for Covid-19	20	28	19
Airport Covid-19 testing	21	16	14
Improved flexible travel options	5	9	11
Financial stability of own company	7	4	8
Cost of the ticket	3	10	8

- Regardless of sector or frequency of flying, the main considerations about future air travel are focused on government travel restrictions, employee willingness to travel, safety measures, and lack of quarantine requirements.

- However, there are some differences by sector: government easing of travel restrictions was a more important factor for Professional, Scientific, and Technical activities businesses (61%), while employee willingness to travel was a more important factor for ICT businesses (67%). No requirement for quarantine was much more important for ICT (50%) and Manufacturing (49%).
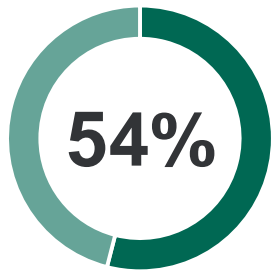
Could the future of business travel look different?

Few businesses see a future entirely without air travel, but there is indication that some would move towards rail in place of flying
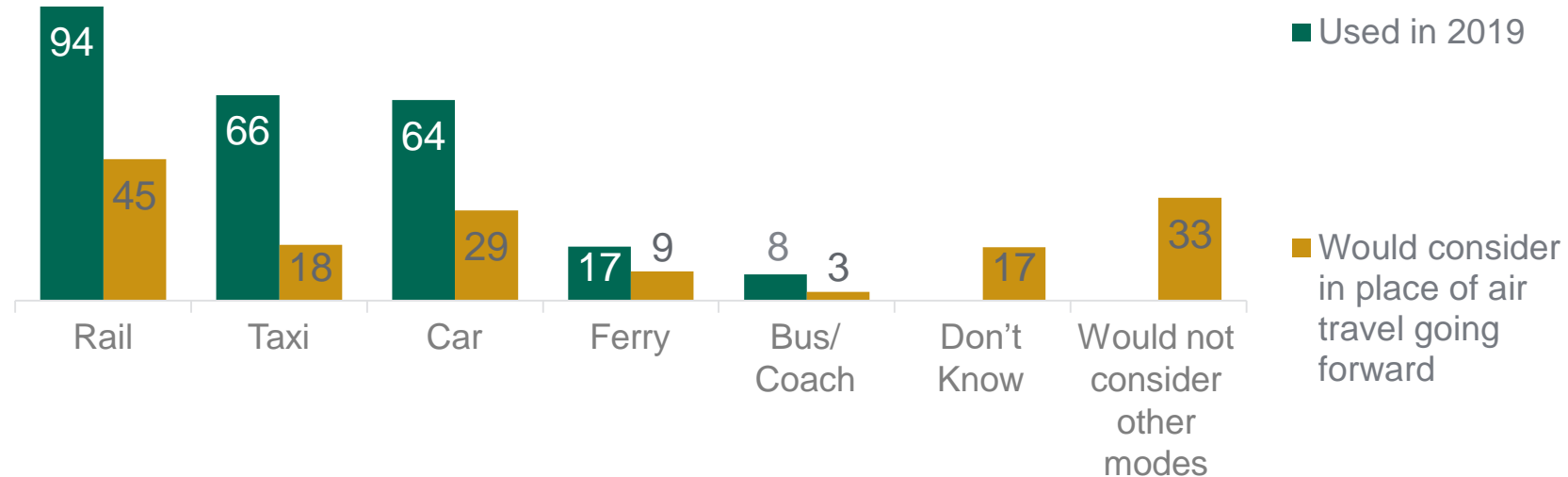
54%

Of businesses travelled by a mode **other than plane at least once a week** for business in 2019.
4% did not use a mode other than plane for business travel in 2019.

94%

Of businesses say they're very or somewhat likely to use a travel management company in the next year.

Comparison between modes used in 2019 and modes considered *in place of air travel* going forwards (%). N=300.

■ Used in 2019

■ Would consider in place of air travel going forward

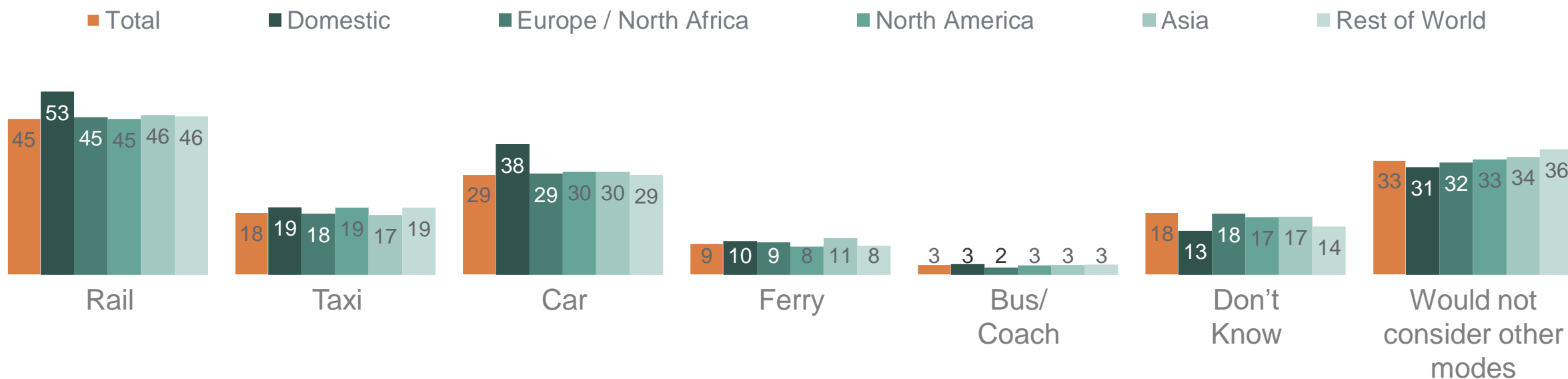| Mode	Rail	Taxi	Car	Ferry	Bus/Coach	Don't Know	Would not consider other modes
Used in 2019	94	66	64	17	8		
Would consider	45	18	29	9	3	17	33

- Businesses used many other modes alongside flying for their business travel in 2019; primarily rail (94%), car (66%), and taxis (64%).

- 45% of businesses stated that they would consider rail in place of air travel in the future, while 33% of businesses would not replace air travel with any other mode in the future.

Especially amongst those who flew within the UK in 2019, rail has the greatest propensity to replace some business air travel

Would your company be considering, if at all, any of the following transport options in place of air travel for business travel going forward?
Base: Those who flew each route in 2019, n~250 per route.

Legend: ■ Total ■ Domestic ■ Europe / North Africa ■ North America ■ Asia ■ Rest of World

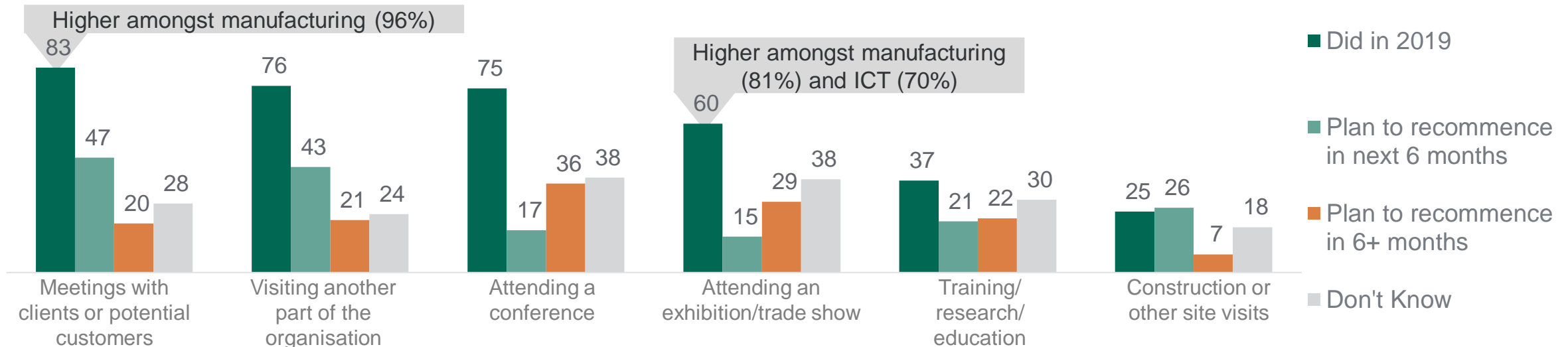| Mode	Total	Domestic	Europe / North Africa	North America	Asia	Rest of World
Rail	45	53	45	45	46	46
Taxi	18	19	18	19	17	19
Car	29	38	29	30	30	29
Ferry	9	10	9	8	11	8
Bus/Coach	3	3	2	3	3	3
Don't Know	18	13	18	17	17	14
Would not consider other modes	33	31	32	33	34	36

- While 45% of total businesses would consider rail as a potential alternative to air travel in the future, amongst this increases to 53% of businesses that used air travel for domestic flights in 2019.

- Those who flew within the UK in 2019 are also more likely to consider replacing air travel with car journeys in the future (38%).

- About 1 in 3 businesses, regardless of the routes they flew in 2019, would not consider another mode for air travel in the future.

Some types of air travel are seen to be more resilient and expect to recommence sooner; there is more uncertainty when it comes to conferences

Reasons for air travel in 2019 vs expected recommencement of air travel for each of these purposes:
In 2019, for what purposes did your business use air travel? When does your business expect to re-commence booking a business trip by air for the following types of business activities? N=300

Higher amongst manufacturing (96%)

Higher amongst manufacturing (81%) and ICT (70%)

Did in 2019

Plan to recommence in next 6 months

Plan to recommence in 6+ months

Don't Know

	Meetings with clients or potential customers	Visiting another part of the organisation	Attending a conference	Attending an exhibition/trade show	Training/ research/ education	Construction or other site visits
Did in 2019	83	76	75	60	37	25
Plan to recommence in next 6 months	47	43	17	15	21	26
Plan to recommence in 6+ months	20	21	36	29	22	7
Don't Know	28	24	38	38	30	18

- Businesses used air travel for a wide range of different purposes in 2019; primarily meeting with clients/customers (83%), visiting another part of the organisation (76%), or attending conferences (75%).

- Businesses are more confident about recommencing air travel for meetings with clients/potential customers (47% plan to recommence within 6 months) or visiting other parts of the organisation (43% plan to recommence within 6 months).

- Businesses are more uncertain about when they plan to recommence flying for conferences or trade shows (38% don't know when they'd recommence flying for these activities).

Conclusions and next steps

1. In 2019, 63% of the members of the Business Travel Association we surveyed typically flew for business at least once a week.

2. Almost all (93%) flew within Europe/North Africa, and c7 in 10 would fly further afield, to either North America, Asia, or Rest of World long haul destinations.

3. The Covid-19 pandemic severely disrupted regular business operations, and 89% of businesses cancelled all international travel in response to the FCO advice. Many (86%) were able to switch to existing teleconferencing systems, while 40% furloughed staff.

4. Businesses have mixed level of confidence about returning to business travel. There is much more confidence about returning to domestic or short haul (Europe/North Africa) routes than longer haul (Asia, North Africa, Rest of World).

5. When planning future air travel, businesses have many considerations. These include Government restrictions (54%), employee willingness to travel (52%), and Covid-19 safety measures (44%).

6. In the future, 45% of businesses would be open to using rail travel in place of some air travel, however 33% of businesses would not consider any other mode than flying for their business travel needs in the future.

7. **Next steps**: We will continue to monitor recovery of this sector in view of this research, working closely with BTA to understand future challenges for business travel when considering the departments recovery work and any medium to longer-term work such as the Aviation Recovery Plan.

Any Questions?