



**NATIONAL BUSINESS
TRAVEL ASSOCIATION**
Connecting the Business Travel World

**SURVEY RESULTS AND ANALYSIS:
SWINE FLU OUTBREAK IMPACT ON BUSINESS TRAVEL**

May 2009

The National Business Travel Association (NBTA), the leading association for the global business travel industry, presents the following findings to help its members and the business travel industry understand the impact of the recent outbreak of the H1N1 Virus, known as Swine Flu.

The findings are from a NBTA survey of 113 US based corporate travel managers conducted online during the last week of April 2009.

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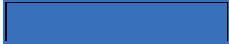




NBTA's swine flu resource center:

www.nbta.org/swineflu

EFFECTS OF THE OUTBREAK ON CORPORATE TRAVEL

Corporate travel divisions are focused on disseminating information on the illness and how to prepare for it. The biggest change in behavior is the massive cancellation of business trips to Mexico. Outside of travel to Mexico, there has been no major impact on business travel overall.

- 61% of travel managers indicate that their travelers are canceling trips to Mexico with another 10% canceling trips to other infected areas.
- 44% are proactively informing both employees and travelers about the virus and the needed precautions they should take









How has the Swine Flu (H1N1 Virus) outbreak affected your company and travel management? (select all that apply)		
Responses	%	Percentage of total respondents
No changes so far/ Evaluating the situation	15.93%	
Not worried	3.54%	
Doesn't affect us	2.65%	
Canceling non-essential travel to Mexico	59.29%	
Canceling non-essential travel to every infected area	10.62%	
Suggesting avoidance of travel to infected areas	30.97%	
Warning all travelers about the illness	46.90%	
Asking travelers to take precautions (wear masks, wash hands, use emergency help line, etc.)	24.78%	
As it may be pandemic, company wide warnings issued to all employees (not limited to travelers)	45.13%	
Travelers with recent trips from Mexico working from home/staying home	17.70%	
Other (please specify)	6.19%	

Multiple answers per participant possible. Percentages added may exceed 100 since a participant may select more than one answer for this question.

TRAVEL RISK MANAGEMENT

While travel risk management takes a variety of forms at different companies, the common theme is preparedness:

- 42% of respondents indicate that their Risk Management Programs include emergency help lines, hospitalization and evacuation assistance to deal with outbreaks of illnesses such as H1N1.
- 59% of respondents track the whereabouts of employees allowing them to provide better assistance during medical emergencies.
- 26% of those surveyed have policies that require employees returning from infected areas to stay home.

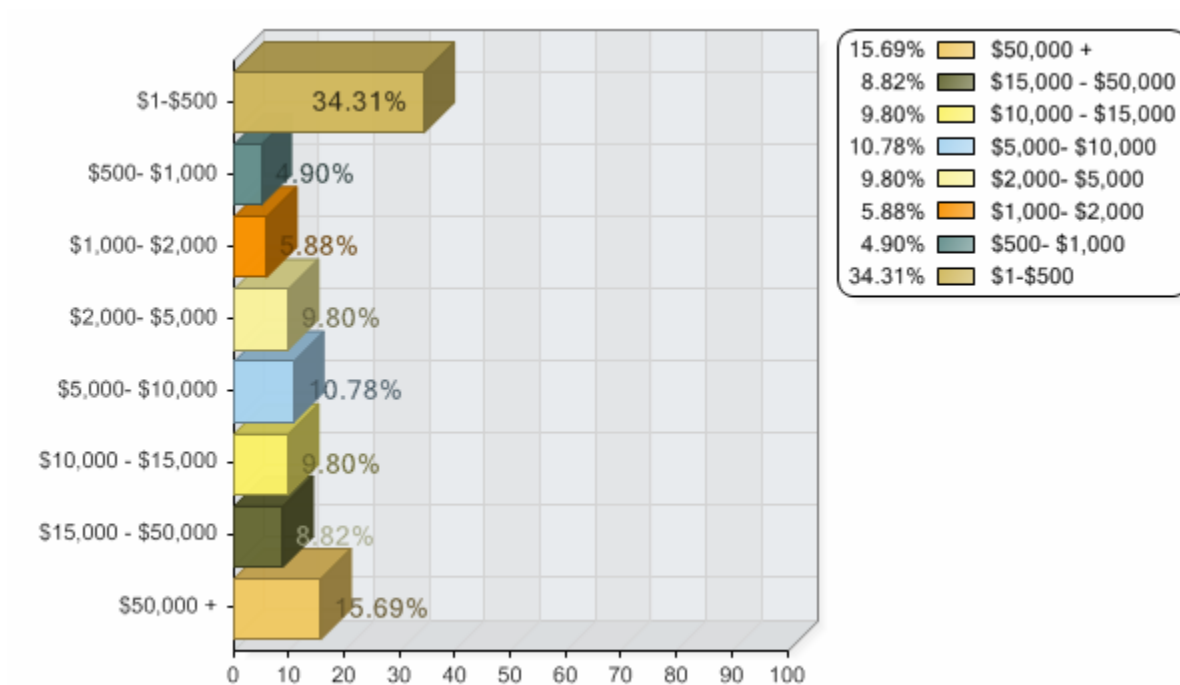
If your Global Risk Management program includes an action plan for pandemic illnesses, which of the following does it include? (select all that apply)		
Responses	%	Percentage of total respondents
Global emergency help line for medical referrals, hospitalization and evacuation	42.45%	
Help line for medical referrals only	16.98%	
Stocking medicine and appropriate supplies for travelers and employees	17.92%	
“Quarantine” of employees returning from infected areas	26.42%	
Employee tracking in case of medical emergencies	58.49%	
Nurse or Medical services onsite	17.92%	
Apply all the CDC recommendations	42.45%	
Other (please specify)	1.89%	
Multiple answers per participant possible. Percentages added may exceed 100 since a participant may select more than one answer for this question.		

TRAVEL COSTS OF THE OUTBREAK, SO FAR

Estimated cost impacts of H1N1 to date vary widely from company to company:

- 34% of respondents estimate that the changes, cancellations and loss of business have cost their companies less than US\$500.
- 16% estimate expenses to be higher than US\$50,000 when loss of business opportunities are taken in consideration on top of the cancellation and changes costs.

How much would you estimate this situation is costing your company in canceled meetings, rebooked trips, lost business, etc?



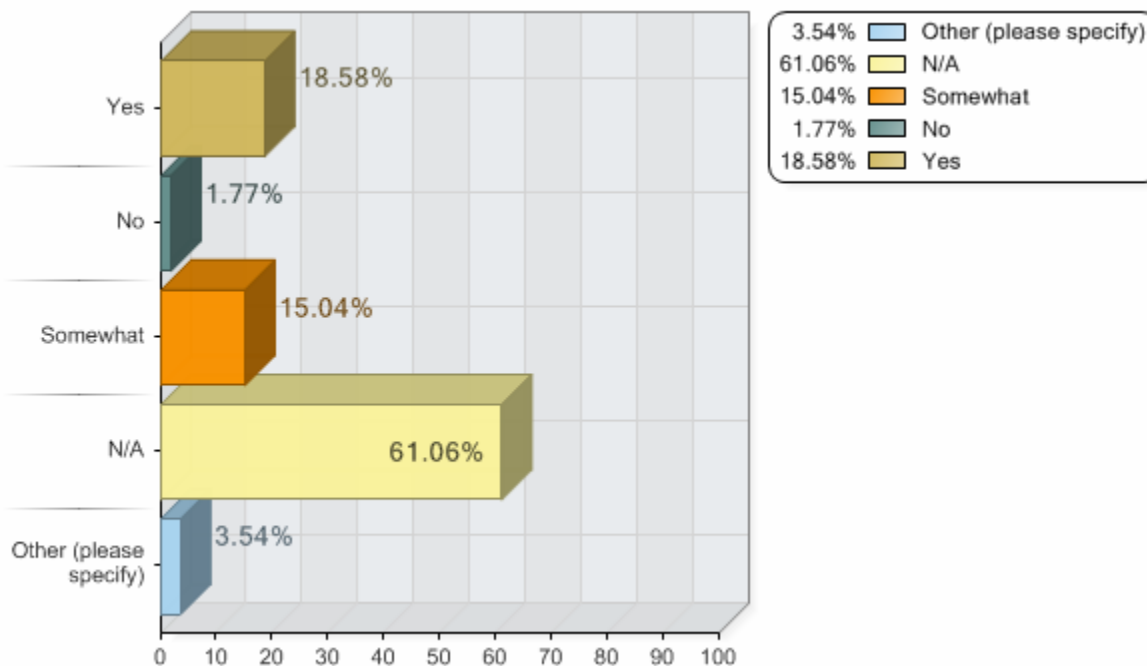
DEALING WITH VENDORS

The airlines have been very proactive in offering waivers and flexibility on changes and cancellations for travel to Mexico. Opinions on the utility of that added flexibility vary: 34% of the travel manager respondents indicate they expect to be able to work within the prescribed deadlines; 27% report that even with the relaxed rules rescheduling trips and meetings is challenging due to the uncertainty of the progressing outbreak.

Are airlines' new rebooking policies for travel to Mexico flexible enough to help you minimize your losses?		
Responses	%	Percentage of total respondents
Yes, we are expecting to reissue tickets before the deadline	34.51%	
No, uncertainty of the severity of the outbreak won't allow us to rebook on time	26.55%	
Was not aware of such policies	5.31%	
Not applicable / Not affected	33.63%	

Hotels have also provided waivers on cancellation policies but the impact on those has been minimal since most hotels normally offer more flexibility with cancellations and changes than the airlines do.

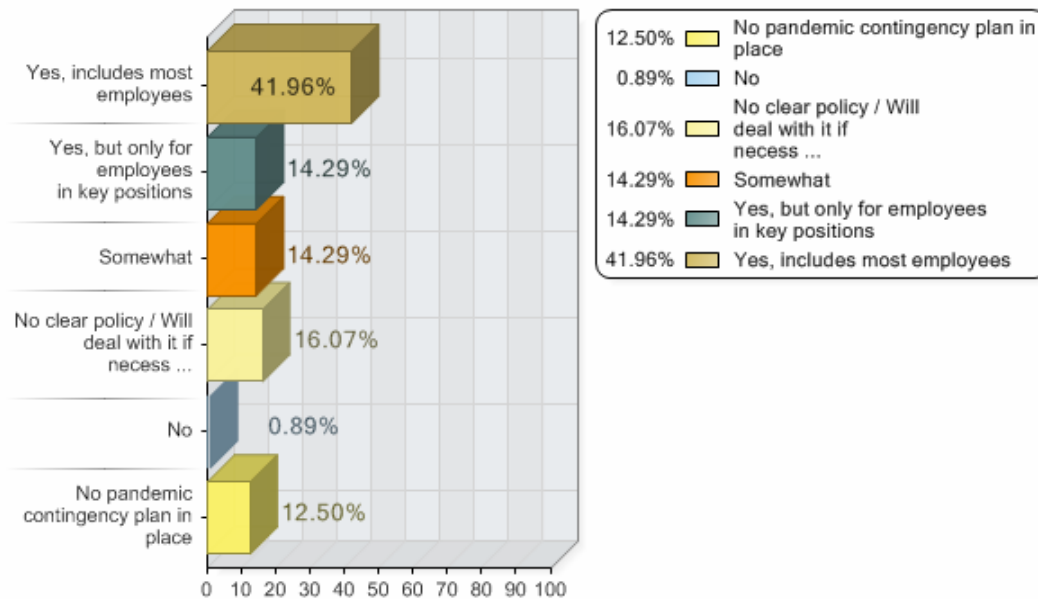
Have hotels and meeting planners being flexible enough with cancellation policies, offering refunds, adjusting meeting contracts and changing dates?



CONTINUATION OF BUSINESS OPERATIONS

In the event that the H1N1 turns pandemic, the majority of corporations have contingency plans to allow at least some employees to work remotely to maintain key business operations.

If the outbreak expands globally and quickly, does your company's pandemic contingency plan allows for employees to work remotely to continue business operations?



Although there is overall concern about the quick development of the situation, most travel managers (55%) are not panicking about the effects and consequences of a possible pandemic, but are taking all the necessary precautions dictated by the companies or suggested by health officials.

Do you see this outbreak as: (select the one that closest resembles your opinion)		
Responses	%	Percentage of total respondents
Very serious and will spread globally, greatly affecting business travel	8.04%	
Very concerned, but will be contained as SARS was	25.00%	
Worried but not panicking	55.36%	
Media is overreacting and negatively affecting business travel again	13.39%	
Not concerned, but my duty is to take the necessary precautions	8.04%	
N/A - Does not affect us	0.89%	
Unsure / don't know	1.79%	
Multiple answers per participant possible. Percentages added may exceed 100 since a participant may select more than one answer for this question.		

Additional comments from respondents

	<ul style="list-style-type: none"> • We evaluate every morning the situation and CDC recommendations to communicate with the senior management
	<ul style="list-style-type: none"> • Personal travel to Mexico will be affected if it [World Health Organization Pandemic Threat Level] goes to a 6. Our business travel has not yet been affected.
	<ul style="list-style-type: none"> • We have alerted our folks to be cautious and on top of anti bacterial hygiene. Especially for travelers going out of the country or traveling long distances by plane. • Company providing anti bacterial hand cleaner for all travelers. • Our security dept has asked that all inbound international travelers stay at home for 72 hours before coming to the workplace
	<ul style="list-style-type: none"> • Suppliers have been flexible and accommodating, but not the travel agency (TMC) • Implementing complete pre-trip approval for all travel - air, car and/or hotel • Monitoring employees that have just returned from Mexico--more precautions being taken at our location in Mexico • We haven't made a formal announcement forbidding travel to MX, but no one is going.
	<ul style="list-style-type: none"> • We are asking coworkers who have recently traveled on vacation to Mexico, or who have been in contact with people who have recently traveled to Mexico, to contact our Health Services.
	<ul style="list-style-type: none"> • All Pandemic Response resources are in order and daily communications are going to all employees. • Group Health and Security are working in tandem to monitor and provide guidance.
	<ul style="list-style-type: none"> • We are monitoring the situation very closely and will continue to escalate our actions as deemed appropriate. Our plan includes many steps that we may decide to put in place. Fortunately, we communicate some of the precautions to our travelers ALL the time, not just during this kind of crisis. • Still discussing business continuity plans