



The Impact of COVID-19 to Members

September 2020 - Travel Restrictions

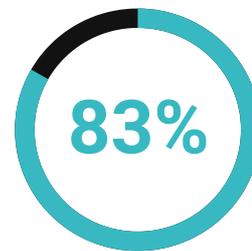
From 7-18 September 2020 we polled our members on the **impacts of travel restrictions caused by COVID-19 between the UK and Singapore**. Repeatedly raised as an important issue by our members, the poll asked for feedback on pre-COVID travel needs, areas of concern, direct impacts to the business, tolerance for quarantine periods and costs, and the future travel needs of the business.

The results illustrate the ongoing resilience of our members, who for the most part are not considering relocating from Singapore and plan to continue short term business travel in the future. Quarantine, costs and confirmation of re-entry for employment pass holders pre-travel plans are the key elements for discussion.

For ongoing support and information relating to COVID-19 visit covid.britcham.org.sg.

Benchmarking business travel needs pre-Covid

We asked members how much they relied on short term business travel between the UK and Singapore, and whether their company had employees transiting through Singapore to elsewhere in APAC.



Required business travel between the UK and Singapore, with **46% of this number travelling at least once a quarter**

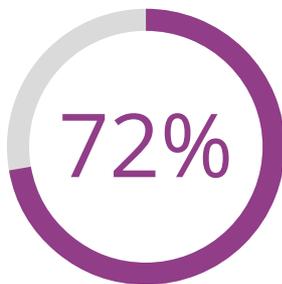


Required travellers to **transit through Singapore to other APAC countries**, 26% of these at least once a quarter

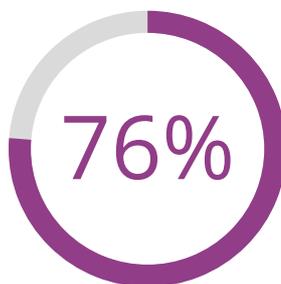


Rating the areas of concern caused by travel restrictions

The following results are based on a sliding scale of 1-10, with 10 indicating the highest level of concern. Among small businesses, over 80% were highly concerned about quarantine delays, while work pass approval decisions were more of a concern for larger businesses.



Rated **quarantine period in the UK** as level 8 or higher



Rated **quarantine period in Singapore** as level 8 or higher



Rated **cost of quarantine & testing in Singapore** as level 8 or higher



Rated **restrictions on work pass approvals** as level 8 or higher



Rated **potential for short-notice rule changes** as level 8 or higher



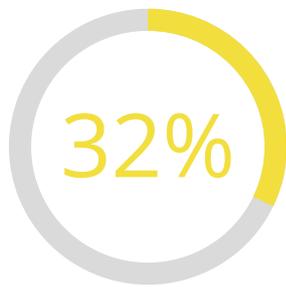
Rated **health risks** as level 8 or higher



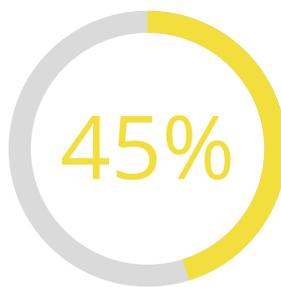
Rated **budget restrictions** as level 8 or higher

Rating the impact of ongoing travel restrictions

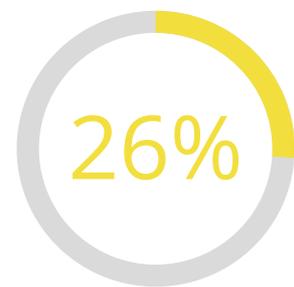
Small businesses indicated higher short-term losses when asked to quantify impacts, with cashflow proving critical. Businesses in the F&B, travel, aerospace and construction sectors had the strongest concerns around new sales pipelines and the scale of losses.



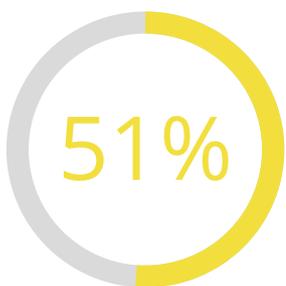
Rated **impact to the bottom line** as level 8 or higher



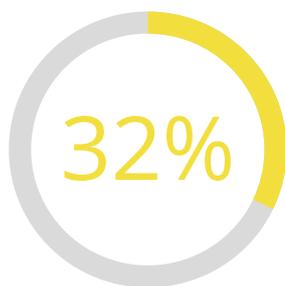
Rated **impact to new sales pipeline** as level 8 or higher



Rated **impact on completion of existing orders & projects** as level 8 or higher



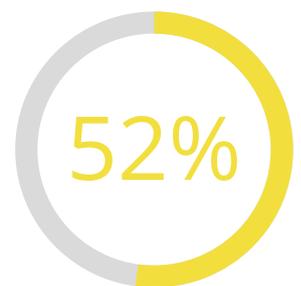
Rated **impact to global mobility needs** as level 8 or higher



Rated **impact to recruitment, training & development** as level 8 or higher



Rated **impact to pre-agreed strategic plans for 2020** as level 8 or higher



Rated **impact to proposed strategic plans for 2021** as level 8 or higher

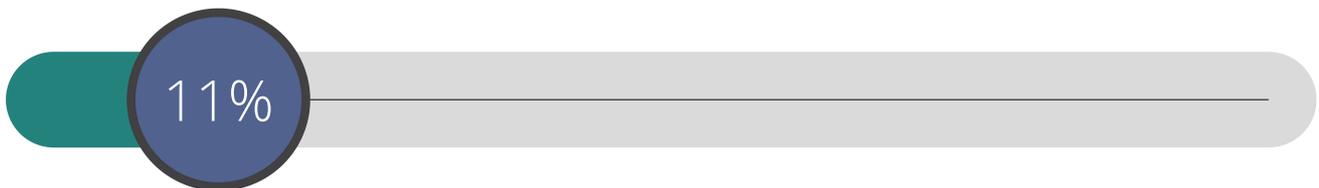
Confidence in Singapore continues

Despite the travel restrictions, over three-quarters of respondents are not looking to relocate any part of their business. Additionally, only 17% are considering an alternative travel hub to Singapore for transit in the future.

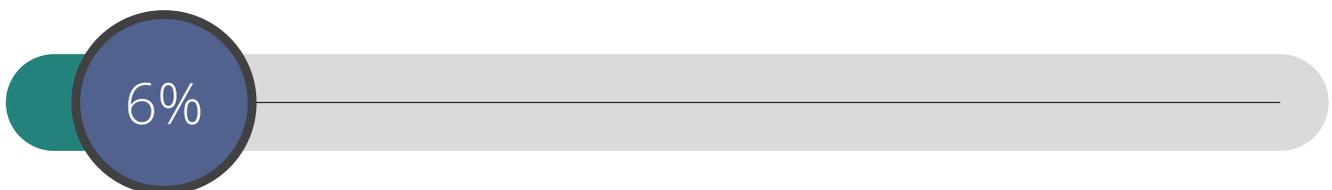
79% are not considering relocating any part of their business



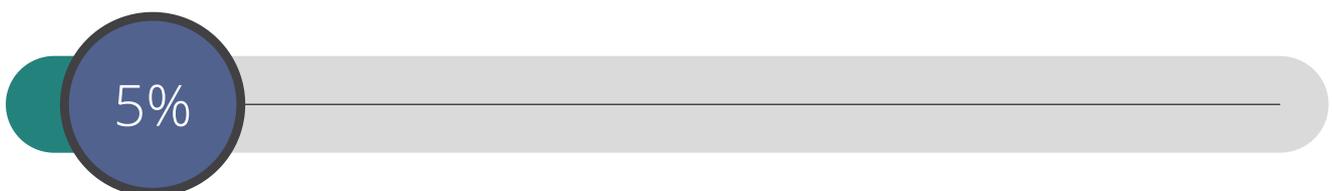
11% are considering downsizing



4% are considering relocating part of their business outside of the APAC region, with 2% considering moving the entire business



3% are considering relocating part of their business within the APAC region, with 2% considering moving the entire business



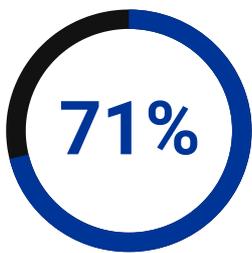
How long are businesses willing to tolerate ongoing travel restrictions?

We asked members how long their business would be able to withstand the existing travel restrictions before needing to make significant strategic changes.

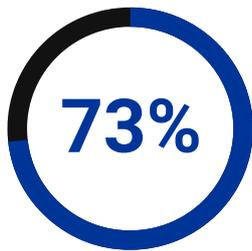


The appetite for travel and the outlook for the future

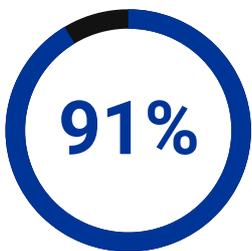
Only 16% of respondents had travelled between Singapore and the UK during Covid, primarily to see family. Those who had travelled shared their experiences of the implications of quarantine and re-entry restrictions.



Are **waiting on the resumption of practical short term travel to the UK**. 41% of these are eagerly awaiting updates, while 30% will only resume travelling for business when it is viable on a mass scale



Plan to rely on short term business to the UK in the future, with 30% of this number travelling at least once a quarter. Over a quarter no longer anticipate a need for these trips post-Covid

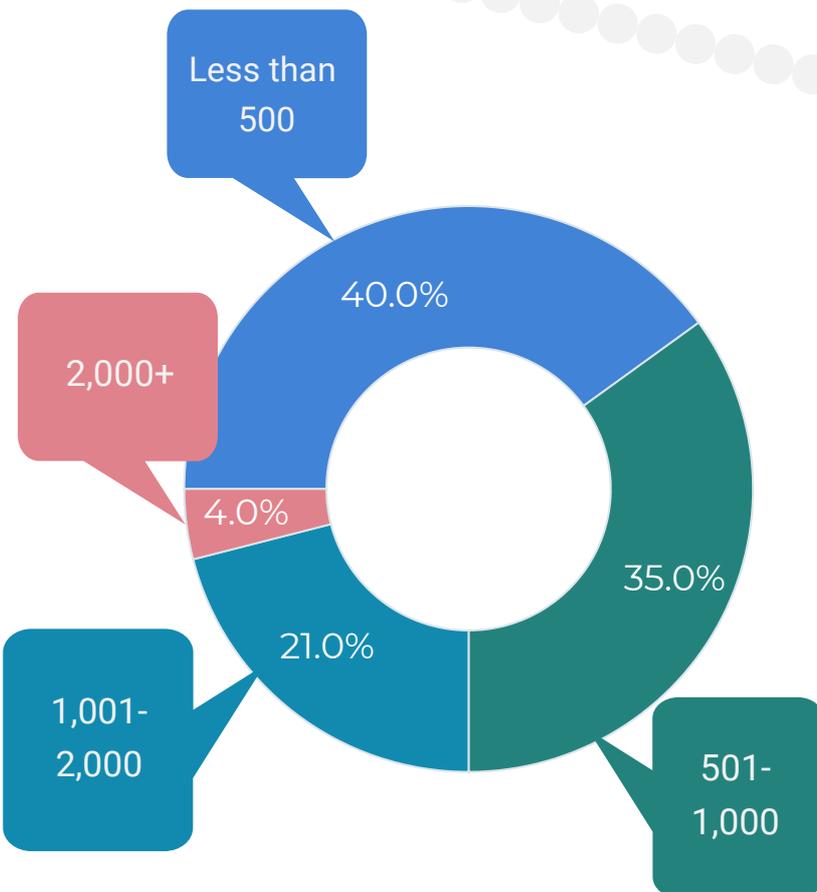
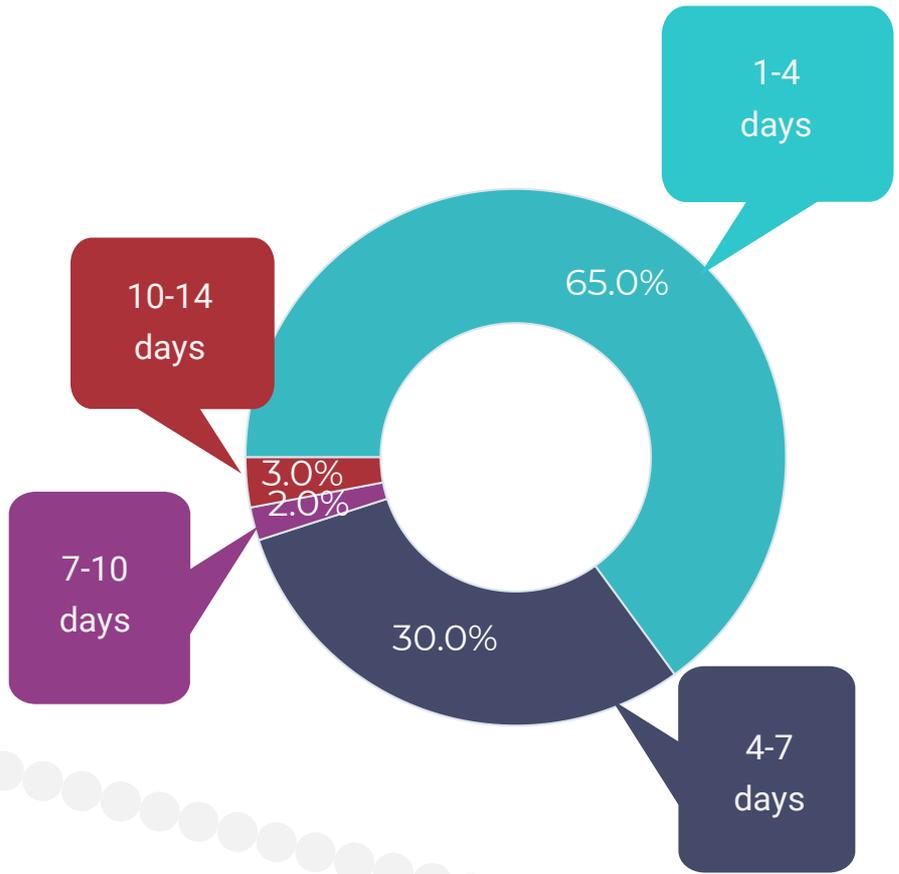


Of those who used Singapore for transit to APAC, 91% plan to continue in the future. Separately, over 70% of those who transit are highly concerned about quarantine delays.



What would be an acceptable delay and cost for businesses to resume regular business travel?

How short would a quarantine period in either the UK or Singapore need to be?



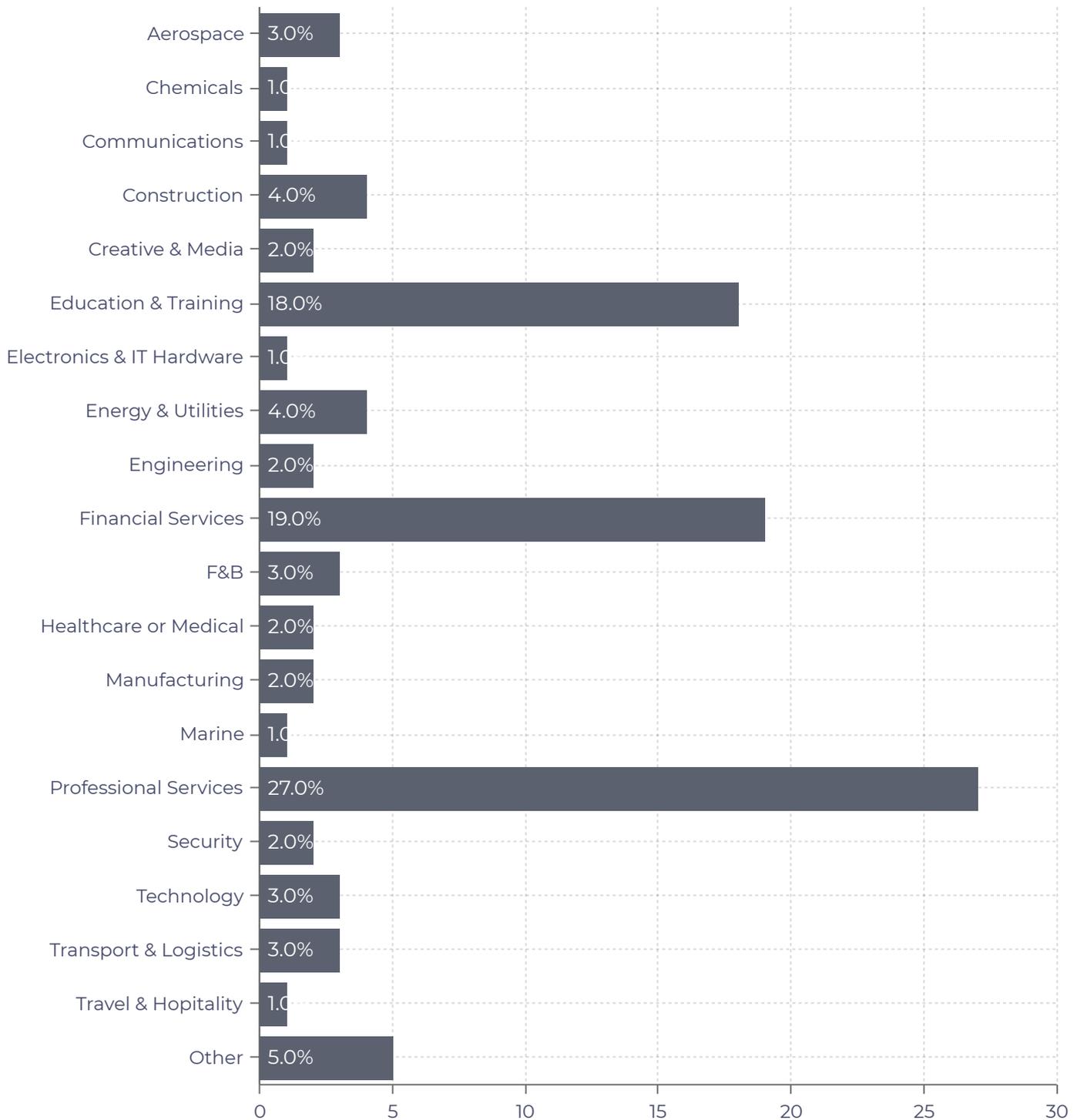
What would be an acceptable combined cost of testing and quarantine? (in SG\$)

90% of respondents would be willing to take an unsupervised home test if needed

Survey Demographics

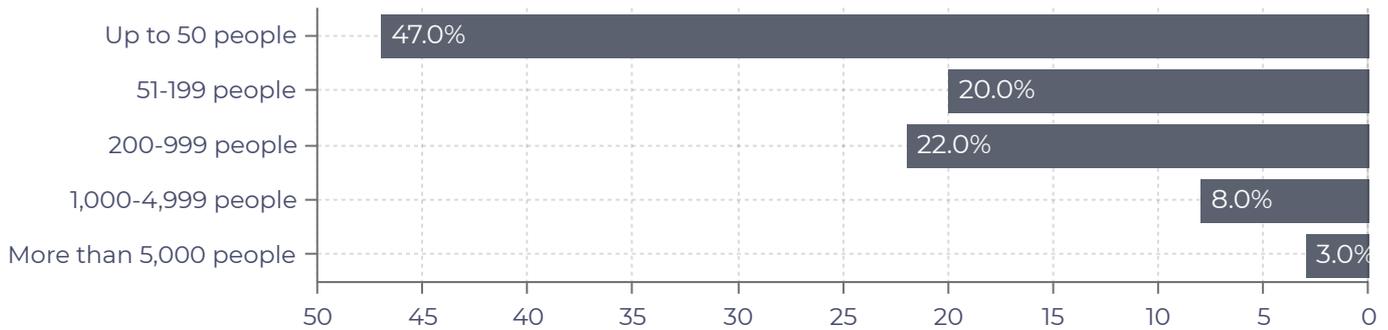
Total of 197 respondents

Respondents by sector



Survey Demographics

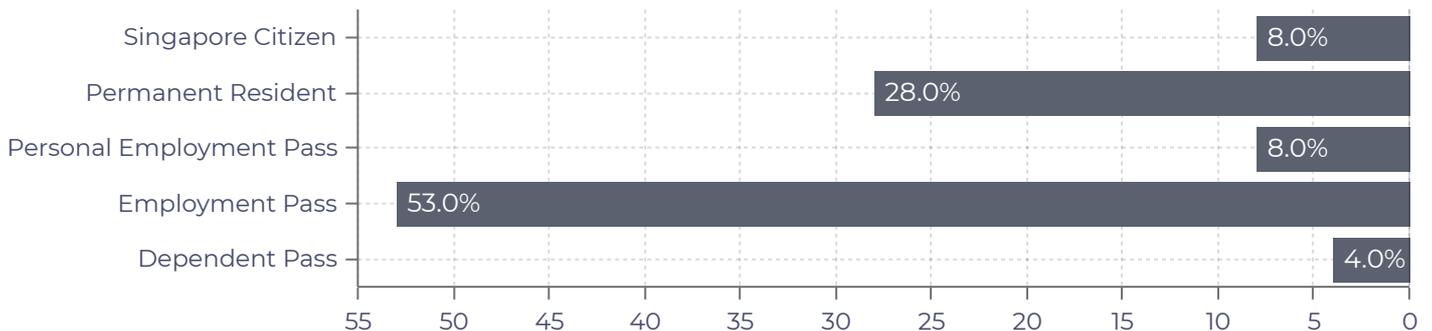
Respondents by number of employees



Respondents by seniority



Respondents by Singapore visa type



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