

## 2020 Coronavirus Poll June 17, 2020



## POLL RESULTS

---

### 1. Which of the following best describes you?

- Travel manager / buyer: 40%
- Procurement/sourcing professional: 8%
- Supplier: 31%
- TMC: 12%
- Other: 9%

### 2. [If supplier or TMC]: Which of the following best describes the company you work for?

- Hotel chain: 26%
- Travel management company: 28%
- Ground transportation: 13%
- Individual hotel property: 10%
- Travel technology: 7%
- Airline: 6%
- Meetings management provider: 1%
- Payment company: 1%
- Other: 8%

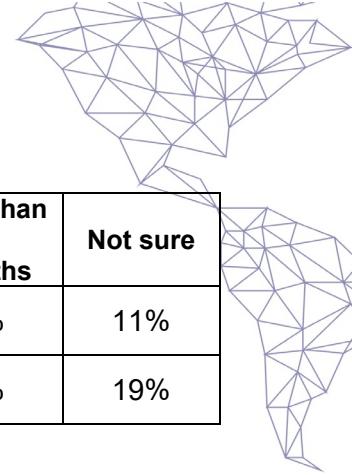


3. Thinking about your company, how has the coronavirus impacted business travel to... ? **[MATRIX: WE HAVE CANCELED OR SUSPENDED ALL TRIPS, WE HAVE CANCELED OR SUSPENDED MOST TRIPS, WE HAVE CANCELED OR SUSPENDED SOME TRIPS, WE HAVE CANCELED OR SUSPENDED A FEW TRIPS, WE HAVE NOT CANCELED OR SUSPENDED ANY TRIPS]**
- a. China
  - b. Hong Kong
  - c. Taiwan
  - d. Other Asia Pacific countries (e.g., Japan, South Korea, Malaysia)
  - e. Europe
  - f. United States
  - g. Canada
  - h. Latin America
  - i. Middle East/Africa
  - j. All international travel
  - k. All Domestic travel

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
China	81%	16%	2%	1%	1%
Hong Kong	80%	17%	1%	1%	1%
Taiwan	78%	19%	2%	1%	1%
Other APAC	73%	21%	3%	1%	1%
Europe	66%	29%	3%	2%	1%
United States	45%	42%	7%	3%	4%
Canada	61%	29%	4%	3%	3%
Latin America	73%	23%	2%	1%	2%
Middle East	75%	21%	2%	1%	2%
All International	65%	29%	3%	2%	1%
All Domestic Travel	35%	48%	8%	5%	5%
All Travel (Domestic and International)	40%	49%	7%	2%	2%

4. You said your company has canceled or suspended business travel due to the Coronavirus. When do you expect your business travelers to resume regular travel to the countries or regions that have been canceled or suspended due to the Coronavirus? Do you expect travel to resume within the next. . . **[MATRIX: 2 MONTHS, 3 MONTHS, 6 MONTHS, 8 MONTHS, 12 MONTHS, MORE THAN 12 MONTHS, UNSURE ]**
- a. Domestic travel [If Q3= cancelled or suspended at least a few domestic trips]
  - b. International travel [If Q3= cancelled or suspended at least a few international trips]





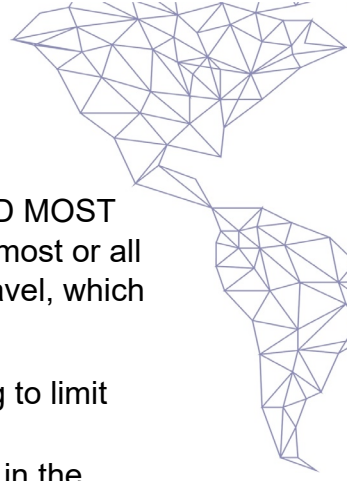
	2 months	3 Months	6 Months	8 Months	12 Months	More than 12 months	Not sure
Domestic travel	33%	27%	20%	6%	2%	1%	11%
International travel	8%	16%	32%	13%	10%	2%	19%

5. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company’s position **[MATRIX: We plan to resume travel in the near future, We have considered resuming travel in the near future, but do not have definite plans, We do not plan to resume travel in the near future, Not sure]**

- a. China
- b. Hong Kong
- c. Taiwan
- d. Other Asia Pacific countries (e.g., Japan, South Korea, Malaysia)
- e. Europe
- f. United States
- g. Canada
- h. Latin America
- i. Middle East/Africa
- j. All international travel
- k. All Domestic travel

	We plan to resume travel in the near future (1-3 months)	We have considered resuming travel in the near future, but do not have definite plans	We do not plan to resume travel in the near future	Not Sure
China	12%	36%	34%	18%
Hong Kong	11%	36%	34%	19%
Taiwan	12%	35%	33%	20%
Other APAC	12%	39%	32%	18%
Europe	25%	41%	20%	14%
United States	38%	38%	13%	11%
Canada	33%	38%	15%	14%
Latin America	13%	40%	29%	18%
Middle East	13%	37%	32%	17%
All International	12%	44%	28%	16%
All Domestic Travel	49%	34%	8%	9%
All Travel (Domestic and International)	22%	50%	12%	16%





6. [DISPLAY IF Q1 = **United States** AND Q4=CANCELED OR SUSPENDED MOST OR ALL DOMESTIC TRAVEL] You mentioned your company has limited most or all domestic travel within the U.S. When your company decides to resume travel, which will most likely be your approach?

- We will resume travel in some states or regions while continuing to limit travel in other states or regions: 38%
- We will wait until we feel comfortable resuming travel anywhere in the country: 40%
- Other: 14%
- Not sure: 8%

7. [DISPLAY IF Q1 ≠ US AND Q4=CANCELED OR SUSPENDED MOST OR ALL DOMESTIC TRAVEL] You mentioned your company has limited most or all domestic travel within your country. When your company decides to resume travel, which will most likely be your approach?

- We will resume travel in some areas or regions of the country, while continuing to limit travel in other states or regions: 38%
- We will wait until we feel comfortable resuming travel anywhere in the country: 46%
- Other: 10%
- Not sure: 7%

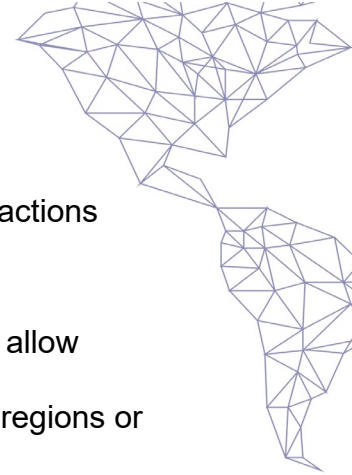
8. [If buyer or procurement] Once travel restrictions begin to be lifted, how do you expect most of your company's employees will react to future business travel for the first six months after restrictions are lifted? Please select one.

- Most employees will be willing to travel: 20%
- Some employees will be willing to travel: 46%
- A few employees will be willing to travel: 19%
- Most employees will be unwilling to travel: 4%
- Don't know: 10%

9. How often does your company host virtual meetings as a result of the coronavirus outbreak?

- Frequently: 82%
- Occasionally: 11%
- Rarely: 3%
- Never: 2%
- Don't know: 3%





10. Thinking about the impact coronavirus has taken on your company, what actions have been implemented?

- We have canceled or suspended all business trips: 46%
- We have canceled or suspended all non-essential trips, but still allow some essential travel: 44%
- We have canceled or suspended all business trips to particular regions or countries: 2%
- We have canceled or suspended business travel on a case-by-case basis, but we do not have a specific policy: 3%
- We generally have not canceled or suspended business trips: 1%
- Other \_\_\_\_\_ Please specify: 3%

11. [DISPLAY IF Q2=SUPPLIER OR TMC] The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a week ago, how do you feel about the industry’s path to recovery?

- I am more optimistic than I was last week: 40%
- I feel the same as last week: 50%
- I am more pessimistic than I was last week: 10%

12. [DISPLAY IF Q3=AIRLINE, HOTEL CHAIN, HOTEL PROPERTY, TMC, OR GROUND] You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past week?

- Our bookings have increased: 46%
- Our bookings have remained the same: 40%
- bookings have decreased: 14%

13. When thinking about the following, which best describes your view?

	The worst has already happened	The worst has yet to come	Not sure
Layoffs/furloughs in the corporate travel industry	52%	31%	18%
Cancelled flights	86%	6%	9%
Hotels suspending operations	78%	12%	10%
Revenue loss for travel companies	47%	34%	19%





14. When thinking about travelers at your company staying in **hotels**, what are the most important actions a hotel can do to help alleviate concerns about health and safety? Please select up to five.

- Increase cleaning standards to exceed current cleaning protocols: 79%
- Require employees to wear face masks: 58%
- Provide additional staff training about COVID-19 sanitary practices and incident reporting: 55%
- Require guests to wear face masks in common areas: 47%
- Provide all guests with safety information concerning their hotel stay: 44%
- Increase communication about hotel sanitation practices: 41%
- Enforce physical distancing guidelines: 38%
- Place signs throughout the property to remind guests and employees of best sanitation practices: 37%
- Provide face masks to guests: 22%
- Guests must request housekeeping to limit the number of people in a room: 21%
- Other: 5%
- Not sure: 2%
- None of the above: 0%

15. Thinking about **ground transportation** such as rental cars, taxis, chauffeured transportation and ride sharing), what are the most important measures these providers can take to make you feel comfortable about your traveler's safety and well-being? Please select up to five.

- Increase cleaning standards to exceed current standards: 69%
- Provide hand sanitizer and disinfectant wipes for customers: 65%
- Require drivers to wear face masks and gloves: 60%
- Install partition to separate the passenger from driver: 52%
- Train drivers about sanitary practices: 46%
- Provide additional staff training about COVID-19 sanitary practices and incident reporting: 37%
- Require passengers to wear face masks and gloves: 33%
- Provide more communication and information concerning cleaning protocols: 28%
- Require drivers to stay in the driver's seat and not assist with luggage or open the door: 28%
- Provide face masks and gloves to passengers: 16%
- Other: 4%
- Not sure: 2%
- None of the above: 1%







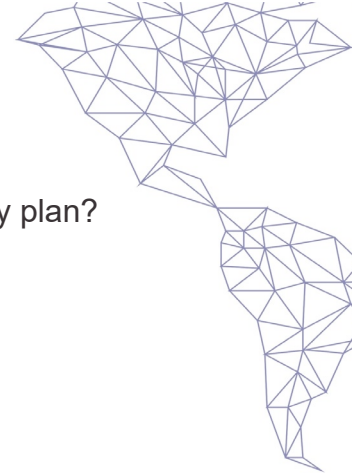
16. What can **airlines** do to help alleviate any concerns your or your travelers may have about flying during the COVID-19 pandemic? Please select up to five.

- Increase airplane cleaning standards to ensure every traveler touchpoint is sanitized before each flight: 78%
- Require all passengers wear masks: 60%
- Keep middle seats empty: 59%
- Require employees wear face masks and gloves: 53%
- Provide all passengers with hand sanitizer and disinfectant wipes: 47%
- Provide additional staff training about COVID-19 sanitary practices and incident reporting: 29%
- Provide all passengers with masks: 21%
- Suspend or reduce inflight food and beverage service: 14%
- Other: 4%
- Not sure: 1%
- None of the above: 1%

17. Do you feel you have enough information about supplier efforts in the following areas?

	I have enough information already	I have some information but would like more	I do not have enough information	Not important
Supplier cleaning and sanitation practices	59%	32%	9%	1%
Information about operational changes such as flight rescheduling or check-in procedures	35%	45%	19%	1%
Safety procedures at airports	28%	46%	26%	1%
Supplier cancellation or change policies/waivers	41%	39%	18%	1%
Vendor staff training on best practices to ensure traveler safety	35%	43%	20%	2%
Third-party inspection/verification of supplier sanitation practices	25%	34%	37%	5%





18. What is the timeframe you are planning for your post-coronavirus recovery plan?

- Within one month: 14%
- Within 3 months: 25%
- Within 6 months: 22%
- Within 8 months: 6%
- In 2021: 18%
- Don't know: 15%

19. Thinking about what it would take for you to feel comfortable with your company's employees traveling on business, how important are each of the following??

**[MATRIX: VERY IMPORTANT, IMPORTANT, SOMEWHAT IMPORTANT, NOT TOO IMPORTANT, NOT AT ALL IMPORTANT]**

- a. Governments lifting travel restrictions or advisories
- b. Stay-at-home lockdowns removed
- c. Other companies allowing travel
- d. Public health guidelines or statements (e.g., WHO or U.S. CDC)
- e. Advice from a risk management firm/consultant (e.g., WorldAware or International SOS)
- f. New Coronavirus vaccine developed and available for your employees
- g. Effective anti-viral treatments that could make infections less lethal
- h. Rate of new infections declines

	Very important / important	Somewhat important	Not too important / Not at all important
Governments lifting travel restrictions or advisories	90%	7%	3%
Stay-at-home lockdowns removed	81%	14%	5%
Other companies allowing travel	48%	27%	26%
Public health guidelines or statements (e.g., WHO or U.S. CDC)	83%	12%	5%
Advice from a risk management firm/consultant (e.g., WorldAware or International SOS)	60%	24%	17%
New Coronavirus vaccine developed and available for your employees	85%	10%	5%
Effective anti-viral treatments that could make infections less lethal	88%	10%	2%
Rate of new infections declines	89%	9%	2%







20. Thinking about each of the following industries, how important is it to have industry-wide COVID-19 guidelines or standards? These guidelines might cover cleaning and sanitation, employee training, capacity limits, face masks, and other topics.

	<b>Very important</b>	<b>Important</b>	<b>Somewhat important</b>	<b>Not too important</b>	<b>Not at all important</b>
Airline industry	85%	11%	3%	0%	0%
Hotel industry	83%	12%	3%	1%	0%
Chauffeured car industry	69%	21%	7%	1%	1%
Rental car industry	71%	21%	6%	1%	1%
Meeting and event industry	72%	20%	7%	1%	1%
Transportation network companies (e.g., Uber, Lyft, Didi, or Gett)	75%	18%	6%	1%	1%
Taxi industry	71%	20%	6%	1%	1%

