

2021 Coronavirus Poll May 20, 2021



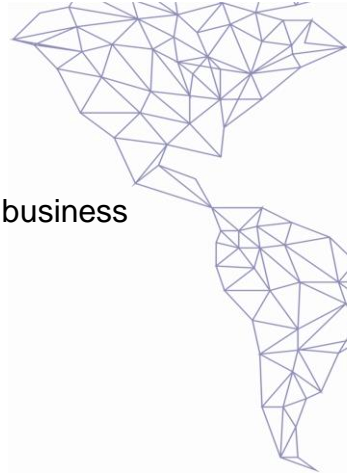
POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 47%
- Procurement/sourcing professional: 8%
- Supplier: 27%
- TMC: 9%
- Other: 10%

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

- Hotel chain: 31%
- Travel management company: 24%
- Ground transportation: 9%
- Individual hotel property: 5%
- Travel technology: 7%
- Airline: 11%
- Meetings management provider: 3%
- Payment company: 2%
- Other: 9%



3. When business travel resumes, please rate your likelihood to extend your business trips for leisure or combine business trips with a personal vacation.

- Much more likely than before the pandemic: 8%
- More likely than before the pandemic: 11%
- Equally likely as before the pandemic: 56%
- Less likely than before the pandemic: 10%
- Much less likely than before the pandemic: 7%
- Not sure: 8%

4. [DISPLAY IF Q2=SUPPLIER/TMC] Thinking about your company, how would you describe the size of its staff today? Note: if your company has acquired a company during the pandemic, please do not include the staff from the acquired subsidiary.

- Much smaller than before the pandemic: 36%
- Smaller than before the pandemic: 40%
- The same size as before the pandemic: 15%
- Larger than before the pandemic: 5%
- Much larger than before the pandemic: 1%
- Not sure: 2%

5. [DISPLAY IF Q2=SUPPLIER/TMC] Thinking about the company that you work for, how do you think the size of its staff will change in the next six months?

- Increase significantly: 4%
- Increase moderately: 59%
- Remain the same: 27%
- Decrease moderately: 5%
- Decrease significantly: 3%
- Not sure: 3%

6. [DISPLAY IF Q5=INCREASE] You mentioned you expect the size of your company's staff to increase in the next six months. Please rate your concern about the following:

It will be difficult to hire qualified candidates because. . .	Very concerned	Concerned	Neither concerned nor unconcerned	Not concerned	Not concerned at all
Many have left the travel industry	14%	34%	15%	28%	9%
Competition with other companies that are also restaffing	16%	39%	19%	17%	9%





7. [DISPLAY IF Q2=SUPPLIER/TMC] What are the biggest obstacles, if any, your company will face as more employees are hired in the current environment? Select all that apply.

- Shortage of qualified candidates: 47%
- Perspective employees hesitant to work in the travel sector: 46%
- Candidates want to work remotely: 35%
- Vaccination verification: 15%
- Other: 11%

8. Some countries are considering implementing digital health verification (also known as a “digital green certificate” or “vaccination passports”) which are government-issued cards or smartphone badges stating the bearer has been inoculated against the coronavirus. The purpose of the Digital Health Verification (or vaccine passport) is to open-up travel and eliminate the need for mandatory quarantine and multiple tests. How effective do you think government-issued digital health verification (or digital green certificates and/or vaccination passports) will be in terms of helping the resumption of business travel??

- Very effective: 36%
- Somewhat effective: 42%
- Neither effective nor ineffective: 8%
- Ineffective: 5%
- Very ineffective: 3%
- Don't know: 7%

9. [DISPLAY IF Q2=BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 17%
- Somewhat willing: 58%
- Neither willing nor unwilling: 11%
- Not willing: 7%
- Not willing at all: 3%
- Not sure: %



10. [DISPLAY IF Q9=NOT WILLING, NOT WILLING AT ALL, NEUTRAL, NOT SURE]

You mentioned some of your company's employees have hesitations regarding resuming business travel. What are the reasons you think some of your employees are hesitant to travel for business?

- Safety concerns: 79%
- Have not been fully vaccinated against the coronavirus: 74%
- Lack of interest: 11%
- Traveling to unfamiliar places: 9%
- Other: 24%

11. Which best describes your company's approach to resuming non-essential business travel?

- We will allow our fully vaccinated employees to resume non-essential trips while continuing to limit travel for those who have not been vaccinated: 16%
- We will wait until we can resume non-essential travel for all employees at the same time regardless of their vaccination status: 46%
- Not sure: 38%

12. In the current environment, what do you view as the single greatest barrier to business travel?

- Company policies restricting employees from traveling: 23%
- Government policies that restrict travel or make it difficult (e.g., entry restrictions or mandatory quarantines): 55%
- Travel budget freeze/ cost savings: 11%
- Employee unwillingness/reluctance to travel: 7%
- Other: 4%
- Not sure: 1%

13. [DISPLAY IF Q1=SUPPLIER/TMC] In the current environment, how do you feel about the financial prospects of companies in the business travel sector?

- Very optimistic: 3%
- Optimistic: 44%
- Neither optimistic nor pessimistic: 23%
- Pessimistic: 23%
- Very pessimistic: 3%
- Not sure: 4%



14. 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. All international travel
- b. All Domestic travel

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
All International	49%	36%	5%	2%	1%
All Domestic Travel	17%	49%	16%	9%	8%
All Travel (Domestic and International)	18%	55%	16%	6%	3%

15. 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?

Region/Country	Plan to Resume Travel in Near Future (1-3 months)	Considering Resuming Travel in Near future, but No Definite Plans	Do Not Plan to Resume Travel in Near Future	Not Sure
All International Travel	13%	57%	22%	8%
All Domestic Travel	42%	44%	7%	8%
All Travel	20%	61%	8%	10%

16. [DISPLAY IF Q1=SUPPLIER/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: 52%
- I feel the same: 47%
- I am more pessimistic: 3%



17. [DISPLAY IF AIRLINE, HOTEL, TMC, OR GROUND TRANSPORTATION] 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: 54%
- Our bookings have remained the same: 36%
- Our bookings have decreased: 10%

