

## 2021 Coronavirus Poll June 17, 2021



## POLL RESULTS

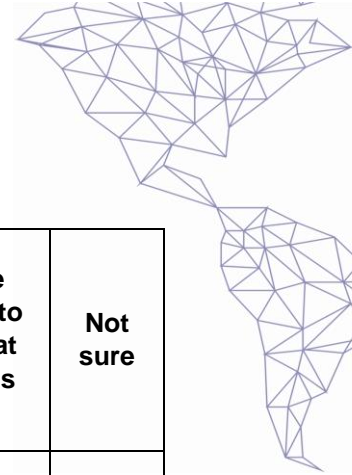
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### 1. Which of the following best describes you?

- Travel manager / buyer: 49%
- Procurement/sourcing professional: 8%
- Supplier: 26%
- TMC: 8%
- Other: 8%

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

- Hotel chain: 35%
- Travel management company: 24%
- Ground transportation: 5%
- Individual hotel property: 6%
- Travel technology: 7%
- Airline: 9%
- Meetings management provider: 1%
- Payment company: 3%
- Other: 19%



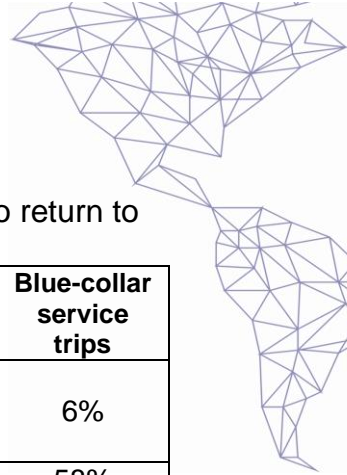
3. Which of the following best describes your company's...?

Which of the following best describes your company's...?	Already happened	We have decided on or announced a date	We are working to finalize a date but have not decided or announced one yet	We are waiting to see what happens	Not sure
Plan to re-open its office(s) in the country where you are based	43%	24%	21%	8%	4%
Plan to resume non-essential domestic business travel in the country where you are based	40%	8%	25%	18%	8%
Plan to resume non-essential international business travel from the country where you are based	12%	5%	21%	39%	23%

4. You mentioned your company has finalized a date for the following. When is this date?

Which of the following best describes your company's...?	Less than one month away	1 to less than 3 months away	3 to less than 6 months away	More than 6 months away
Plan to re-open its office(s) in the country where you are based	27%	47%	23%	2%
Plan to resume non-essential domestic business travel in the country where you are based	48%	41%	7%	4%
Plan to resume non-essential international business travel from the country where you are based	25%	54%	13%	8%





5. How long do you think it will take for the following types of business trips to return to their pre-pandemic level?

	Sales/account management trips	Internal collaboration	Education/ personal development	White-collar service trips	Blue-collar service trips
It will never return to the pre-pandemic level	8%	19%	13%	9%	6%
Less than 1 year	53%	40%	40%	48%	58%
1 year to less than 2 years	28%	26%	30%	25%	12%
2 years to less than 3 years	4%	6%	9%	3%	1%
More than 3 years	2%	2%	2%	1%	1%
Not sure	6%	6%	6%	13%	22%

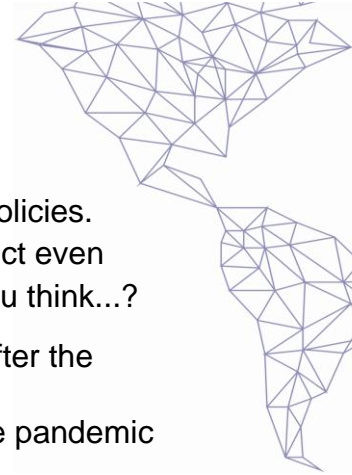
6. Which of the following best describes your company’s return to travel planning?

- A cross-department committee or task force is leading our return to travel planning efforts: 40%
- Different departments are leading different elements of our return to travel planning efforts: 28%
- A single department is leading our return to travel planning efforts (e.g., travel, procurement, HR, or security/risk): 17%
- Other (please specify): 6%
- Not sure: 9%

7. How did your company’s travel spend change in May 2021, compared to the prior month?

- Increased a lot: 13%
- Increased somewhat: 46%
- Remained the same: 26%
- Decreased somewhat: 9%
- Decreased a lot: 10%
- Not sure: 2%





8. The pandemic has made many companies revisit their work-from-home policies. Some companies have announced permanent changes will remain in effect even after the pandemic ends. Thinking about your company specifically, do you think...?
- Employees will have much more flexibility to work from home after the pandemic they did before the pandemic: 38%
  - Employees will have more flexibility to work from home after the pandemic they did before the pandemic: 41%
  - Employees will have equal flexibility to work from home after the pandemic they did before the pandemic: 17%
  - Employees will have less flexibility to work from home after the pandemic they did before the pandemic: 3%
  - Employees will have much less flexibility to work from home after the pandemic they did before the pandemic: 2%
9. You mentioned you expect employees at your organization will have more flexibility to work from home after the pandemic. Do you think this will lead to...?
- More business travel: 5%
  - It will not affect business travel: 65%
  - Less business travel: 30%

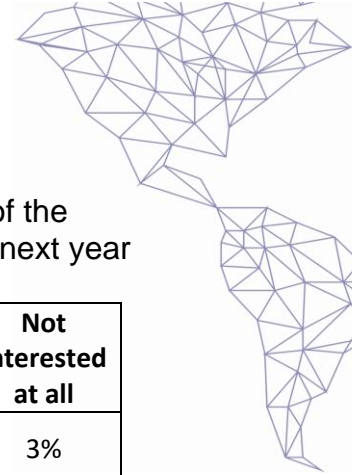
10. [ASKED OF BUYERS/PROCUREMENT PROFESSIONALS] How many of the following types of hotel discounts did your travel program have in place last year (2020)?

	<b>A lot</b>	<b>Some</b>	<b>A few</b>	<b>None</b>	<b>Not sure</b>
Fixed rates with individual properties	42%	26%	17%	10%	5%
Dynamic discounts with individual properties	18%	32%	26%	18%	5%
Dynamic chainwide discounts	17%	27%	29%	22%	6%
TMC/consortia rates	26%	31%	22%	13%	8%

11. [ASKED OF BUYERS/PROCUREMENT PROFESSIONALS] How many of the following types of hotel discounts does your travel program have in place this year (2021)?

	<b>A lot</b>	<b>Some</b>	<b>A few</b>	<b>None</b>	<b>Not sure</b>
Fixed rates with individual properties	34%	31%	19%	12%	5%
Dynamic discounts with individual properties	22%	38%	19%	15%	5%
Dynamic chainwide discounts	17%	29%	26%	21%	8%
TMC/consortia rates	25%	32%	21%	13%	9%





12. [ASKED OF BUYERS/PROCUREMENT PROFESSIONALS] How many of the following types of hotel discounts does your travel program have in place next year (2022)?

	Very interested	Interested	Neither interested nor uninterested	Not interested	Not interested at all
Fixed rates with individual properties	27%	50%	16%	4%	3%
Dynamic discounts with individual properties	28%	51%	15%	2%	5%
Dynamic chainwide discounts	32%	47%	15%	3%	3%
TMC/consortia rates	21%	44%	24%	6%	6%

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

- Very willing: 19%
- Somewhat willing: 58%
- Neither willing nor unwilling: 9%
- Not willing: 5%
- Not willing at all: 1%
- Not sure: 8%

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

- Very optimistic: 13%
- Optimistic: 41%
- Neither optimistic nor pessimistic: 22%
- Pessimistic: 16%
- Very pessimistic: 3%
- Not sure: 5%





15. 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
- c. All travel, domestic and international

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
<b>All International</b>	52%	39%	6%	2%	1%
<b>All Domestic Travel</b>	21%	43%	19%	8%	10%
<b>All Travel (Domestic and International)</b>	21%	51%	17%	8%	4%

16. 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	21%	53%	18%	9%
All Domestic Travel	51%	39%	5%	5%
All Travel	27%	55%	7%	11%

17. **[DISPLAY IF 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: 56%
- I feel the same: 40%
- I am more pessimistic: 4%





18. [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: 62%
- Our bookings have remained the same: 32%
- Our bookings have decreased: 6%

