POLL RESULTS

1. Which of the following best describes you?
   - Travel manager / buyer: 48%
   - Procurement/sourcing professional: 9%
   - Supplier: 31%
   - TMC: 6%
   - Other: 5%

2. [If supplier or TMC]: Which of the following best describes the company you work for?
   - Hotel chain: 38%
   - Travel management company: 17%
   - Ground transportation: 8%
   - Individual hotel property: 5%
   - Travel technology: 13%
   - Airline: 8%
   - Meetings management provider: 2%
   - Payment company: 3%
   - Other: 14%
3. Which of the following best describes your company’s current position on employees traveling for business?

<table>
<thead>
<tr>
<th></th>
<th>Not allowed</th>
<th>Rarely allowed</th>
<th>Sometimes allowed</th>
<th>Usually allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-essential domestic business trips</td>
<td>12%</td>
<td>16%</td>
<td>26%</td>
<td>47%</td>
</tr>
<tr>
<td>Non-essential international business trips</td>
<td>29%</td>
<td>24%</td>
<td>27%</td>
<td>21%</td>
</tr>
</tbody>
</table>

4. Thinking about the Omicron variant, which of the following best describes your near-term expectations for business travel over the next three months?

- The worst of the Omicron variant is behind us, and business travel will quickly pick up in the next three months: 29%
- The worst of the Omicron variant is behind us – but business travel will pick up slowly in the next three months: 50%
- The Omicron variant will continue to weigh on business travel recovery in the next three months: 17%
- Not sure: 5%

5. [DISPLAY IF = BUYER/PROCUREMENT] Thinking about your company’s current business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

- Less than 10% of our pre-pandemic bookings: 16%
- 11-20% of our pre-pandemic bookings: 19%
- 21-30% of our pre-pandemic bookings: 18%
- 31-40% of our pre-pandemic bookings: 13%
- 41-50% of our pre-pandemic bookings: 11%
- 51-60% of our pre-pandemic bookings: 7%
- 61-70% of our pre-pandemic bookings: 7%
- 71-80% of our pre-pandemic bookings: 4%
- 81-90% of our pre-pandemic bookings: 1%
- 91-100% of our pre-pandemic bookings: 1%
- We have exceeded our pre-pandemic bookings: 3%
- Not sure: 2%

- Mean: 33.3%
- Median: 23.9%
6. [DISPLAY IF = SUPPLIER/TMC] Thinking about your company’s current bookings from business travel, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? Your best estimate is fine.

- Less than 10% of our pre-pandemic bookings: 8%
- 11-20% of our pre-pandemic bookings: 14%
- 21-30% of our pre-pandemic bookings: 14%
- 31-40% of our pre-pandemic bookings: 11%
- 41-50% of our pre-pandemic bookings: 9%
- 51-60% of our pre-pandemic bookings: 7%
- 61-70% of our pre-pandemic bookings: 10%
- 71-80% of our pre-pandemic bookings: 7%
- 81-90% of our pre-pandemic bookings: 6%
- 91-100% of our pre-pandemic bookings: 1%
- We have exceeded our pre-pandemic bookings: 2%
- Not sure: 10%

- Mean: 41.9%
- Median: 35.0%

7. How much would you prefer to travel for business in the future?

- Much more than I did before the pandemic: 6%
- Somewhat more than I did before the pandemic: 7%
- The same amount as I did before the pandemic: 55%
- Somewhat less than I did before the pandemic: 22%
- Much less than I did before the pandemic: 8%
- Not sure: 2%

8. [DISPLAY IF = BUYER/PROCUREMENT] Compared to before the pandemic, do you think employees at your company are more or less interested in extending work trips for leisure (i.e., taking "bleisure" trips)?

- Much more interested than before the pandemic: 5%
- More interested than before the pandemic: 24%
- Equally interested as before the pandemic: 53%
- Less interested than before the pandemic: 14%
- Much less interested than before the pandemic: 4%
9. [DISPLAY IF Q2=SUPPLIER/TMC] Thinking about your company specifically, please rate your agreement with the following statements:

<table>
<thead>
<tr>
<th></th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
<th>Strongly agree</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is difficult to hire qualified employees in the current environment</td>
<td>3%</td>
<td>15%</td>
<td>12%</td>
<td>43%</td>
<td>25%</td>
<td>2%</td>
</tr>
<tr>
<td>It is difficult to retain qualified employees in the current environment</td>
<td>3%</td>
<td>19%</td>
<td>18%</td>
<td>39%</td>
<td>19%</td>
<td>1%</td>
</tr>
<tr>
<td>We need to offer additional pay or incentives to hire or retain qualified employees in the current environment</td>
<td>5%</td>
<td>8%</td>
<td>17%</td>
<td>44%</td>
<td>23%</td>
<td>4%</td>
</tr>
</tbody>
</table>

10. [DISPLAY IF = SUPPLIER/TMC] Thinking about your company, which of the following best describes the employee base currently? Note: If your company acquired another company – or was acquired – during the pandemic, please do not include the employees from the acquired company.

- Much smaller than it was before the pandemic: 10%
- Somewhat smaller than it was before the pandemic: 27%
- The same size as it was before the pandemic: 37%
- Somewhat larger than it was before the pandemic: 19%
- Much larger than before the pandemic: 4%
- Not sure: 3%

11. [DISPLAY IF = BUYER/PROCUREMENT] During the pandemic, countries have restricted foreign visitors from entering their borders. Thinking about your company specifically, which of the following best describes your view?

- Government travel restrictions have greatly hurt business outcomes: 27%
- Government travel restrictions have somewhat hurt business outcomes: 42%
- Government travel restrictions have not hurt business outcomes: 31%
12. [DISPLAY IF = BUYER/PROCUREMENT] Thinking about your company specifically, which of the following best describes your view?

- Government travel restrictions have greatly disrupted our business operations: 23%
- Government travel restrictions have somewhat disrupted our business operations: 56%
- Government travel restrictions have not disrupted our business operations: 21%

13. [DISPLAY IF Q12=SOMewhat/GREATLY DISRUPTED] You mentioned travel bans have hurt business operations. After travel bans have been lifted, how long would it take for your company’s business operations to return to normal?

- Less than one month: 9%
- 1-2 months: 21%
- 3-4 months: 17%
- 5-6 months: 15%
- 6 months+: 19%
- Not sure: 19%

14. When your company fully reopens its office(s), which of the following is most likely to apply?

- Our company will require most employees to report to the office at least some days: 56%
- Our company will prefer that employees report to the office but not require it. However, it might incentivize reporting to the office (e.g., free lunch or other benefits): 15%
- Our company will not care if employees report to the office or work from home: 19%
- Our company will prefer that employees work from home: 6%
- Our company will never fully reopen its office: 5%

15. How would you rate your country’s entry requirements for international visitors (non-citizens)?

- Much too strict: 10%
- Too strict: 24%
- Neither willing nor unwilling: 17%
- Just right: 46%
- Too lenient: 6%
- Much too lenient: 2%
- Not sure: 12%
16. How do you feel about the following country-level entry requirements for international visitors (non-citizens)?

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Oppose/Strongly oppose</th>
<th>Neither support nor oppose</th>
<th>Support/Strongly support</th>
</tr>
</thead>
<tbody>
<tr>
<td>International visitors need to provide proof of COVID-19 vaccination in order to enter</td>
<td>13%</td>
<td>10%</td>
<td>76%</td>
</tr>
<tr>
<td>International visitors need to take a COVID-19 test prior to departure</td>
<td>24%</td>
<td>19%</td>
<td>57%</td>
</tr>
<tr>
<td>International visitors need to quarantine upon arrival</td>
<td>67%</td>
<td>24%</td>
<td>10%</td>
</tr>
<tr>
<td>Travel bans restricting international visitors (from all countries or certain countries)</td>
<td>62%</td>
<td>23%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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

- Very willing: 22%
- Somewhat willing: 60%
- Neither willing nor unwilling: 9%
- Not willing: 5%
- Not willing at all: 0%
- Not sure: 4%

18. 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]

<table>
<thead>
<tr>
<th>Trip Category</th>
<th>Canceled All Trips</th>
<th>Canceled Most Trips</th>
<th>Canceled Some Trips</th>
<th>Canceled a Few Trips</th>
<th>Canceled No Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>All International</td>
<td>17%</td>
<td>55%</td>
<td>17%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>All Domestic Travel</td>
<td>4%</td>
<td>30%</td>
<td>30%</td>
<td>19%</td>
<td>19%</td>
</tr>
</tbody>
</table>
19. 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?

<table>
<thead>
<tr>
<th>Region/Country</th>
<th>Plan to Resume Travel in Near Future (1-3 months)</th>
<th>Considering Resuming Travel in Near future, but No Definite Plans</th>
<th>Do Not Plan to Resume Travel in Near Future</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>All International Travel</td>
<td>33%</td>
<td>50%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>All Domestic Travel</td>
<td>58%</td>
<td>33%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>All Travel</td>
<td>42%</td>
<td>45%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

20. [DISPLAY IF SUPPLIER/TMC] How do you currently feel about the business travel industry’s path to recovery?

- Very optimistic: 16%
- Optimistic: 61%
- Neither optimistic nor pessimistic: 14%
- Pessimistic: 7%
- Very pessimistic: 1%

21. [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: 45%
- Our bookings have remained the same: 20%
- Our bookings have decreased: 35%