

2020 Coronavirus Poll April 28, 2020



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 44%
- Procurement/sourcing professional: 7%
- Supplier: 28%
- TMC: 11%
- Other: 10%

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

- Hotel chain: 24%
- Travel management company: 27%
- Ground transportation: 9%
- Individual hotel property: 8%
- Travel technology: 9%
- Airline: 8%
- Meetings management provider: 2%
- Payment company: 2%



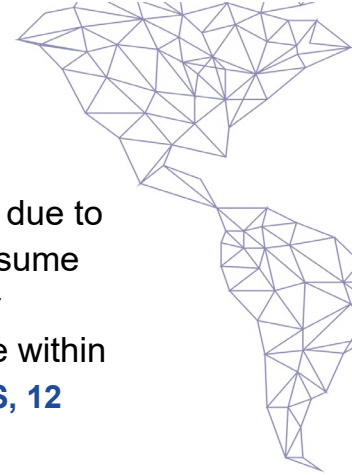
- Other: 11%

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]**

- China
- Hong Kong
- Taiwan
- Other Asia Pacific countries (e.g., Japan, South Korea, Malaysia)
- Europe
- United States
- Canada
- Latin America
- Middle East/Africa
- All international travel
- All Domestic travel

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
China	89%	10%	1%	0%	0%
Hong Kong	88%	11%	0%	0%	0%
Taiwan	89%	10%	0%	0%	0%
Other APAC	84%	15%	1%	0%	0%
Europe	78%	20%	0%	1%	0%
United States	61%	34%	3%	1%	1%
Canada	73%	23%	2%	1%	2%
Latin America	80%	17%	2%	1%	1%
Middle East	84%	14%	1%	0%	1%
All International	77%	21%	1%	1%	0%
All Domestic Travel	52%	40%	4%	1%	2%
All Travel (Domestic and International)	57%	40%	2%	1%	0%





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	28%	33%	16%	2%	1%	0%	19%
International travel	8%	19%	32%	7%	5%	2%	26%

5. [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.

- A few employees will be unwilling to travel: 25%
- Some employees will be unwilling to travel: 63%
- Most employees will be unwilling to travel: 12%
- No employees will be willing to travel: 1%

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

- We have canceled or suspended all business trips: 58%
- We have canceled or suspended all non-essential trips, but still allow some essential travel: 35%
- We have canceled or suspended all business trips to particular regions or countries: 1%
- We have canceled or suspended business travel on a case-by-case basis, but we do not have a specific policy: 2%
- We generally have not canceled or suspended business trips: 0%
- Other _____ Please specify: 3%





7. [If buyer or procurement] Has your company taken the following actions as a result of the coronavirus? - **Reduced staff or laid off employees**
 - Yes: 21%
 - No: 74%
 - Don't know: 6%

8. [If buyer or procurement] Has your company taken the following actions as a result of the coronavirus? - **Furloughed employees**
 - Yes: 21%
 - No: 72%
 - Don't know: 6%

9. [If buyer or procurement] Has your company taken the following actions as a result of the coronavirus? - **Pay cuts for employees**
 - Yes: 20%
 - No: 72%
 - Don't know: 8%

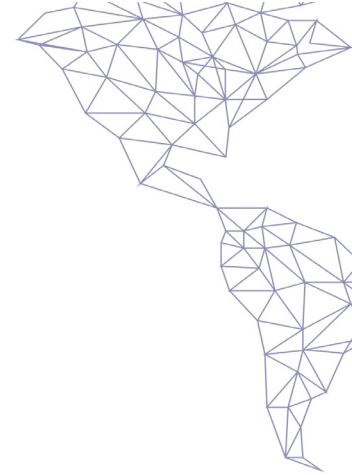
10. [If buyer or procurement AND "yes" for laid off or furloughed employees] You mentioned your company has laid off or furloughed employees as a result of the coronavirus. Approximately what percentage has been affected?
 - 30% - Global Average of Buyers and Procurement

11. [If 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: 19%
 - I feel the same as last week: 57%
 - I am more pessimistic than I was last week: 24%

12. [If airline, hotel chain, hotel property, 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: 6%
 - Our bookings have remained the same: 41%
 - Our bookings have decreased: 49%
 - Not sure: 5%

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





- Within one month: 8%
- Within 3 months: 27%
- Within 6 months: 21%
- Within 8 months: 6%
- In 2021: 10%
- Don't know: 28%

14. 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

	Not too important / Not at all important	Somewhat important	Important / Very important
Governments lifting travel restrictions or advisories	2%	7%	91%
Stay-at-home lockdowns removed	3%	9%	88%
Other companies allowing travel	20%	31%	49%
Public health guidelines or statements (e.g., WHO or U.S. CDC)	2%	7%	90%
Advice from a risk management firm/consultant (e.g., Worldaware or International SOS)	16%	24%	60%
New Coronavirus vaccine developed and available for your employees	3%	12%	85%
Effective anti-viral treatments that could make infections less lethal	2%	9%	89%
Rate of new infections declines	2%	6%	92%





15. When thinking about the following, which best describes your view? **-Layoffs/ furloughs in the corporate travel industry**

- The worst has already happened: 42%
- The worst has yet to come: 41%
- Not sure: 17%

16. When thinking about the following, which best describes your view? **-Cancelled flights**

- The worst has already happened: 77%
- The worst has yet to come: 15%
- Not sure: 8%

17. When thinking about the following, which best describes your view? **-Hotels suspending operations**

- The worst has already happened: 62%
- The worst has yet to come: 26%
- Not sure: 11%

18. When thinking about the following, which best describes your view? **-Revenue loss for travel companies**

- The worst has already happened: 29%
- The worst has yet to come: 56%
- Not sure: 15%

