

2020 Coronavirus Poll May 20, 2020



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 43%
- Procurement/sourcing professional: 7%
- Supplier: 32%
- TMC: 10%
- Other: 8%

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

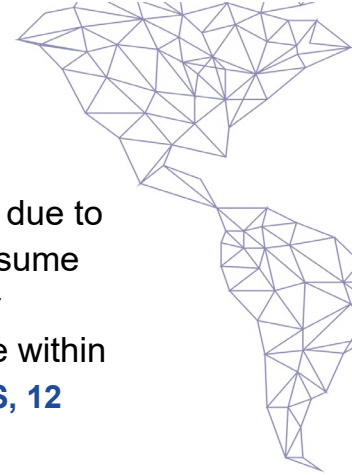
- Hotel chain: 31%
- Travel management company: 22%
- Ground transportation: 12%
- Individual hotel property: 8%
- Travel technology: 7%
- Airline: 6%
- Meetings management provider: 2%
- Payment company: 1%
- Other: 10%



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	86%	13%	1%	0%	0%
Hong Kong	85%	13%	1%	0%	0%
Taiwan	84%	14%	1%	0%	1%
Other APAC	80%	17%	2%	1%	0%
Europe	75%	22%	2%	1%	1%
United States	54%	36%	6%	2%	2%
Canada	68%	26%	3%	1%	2%
Latin America	78%	18%	2%	1%	1%
Middle East	80%	17%	2%	0%	0%
All International	75%	22%	2%	1%	0%
All Domestic Travel	47%	42%	7%	3%	2%
All Travel (Domestic and International)	50%	43%	5%	1%	1%





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]**

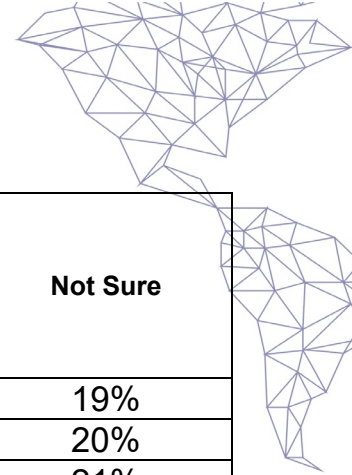
- a. Domestic travel [If Q3= cancelled or suspended at least a few domestic trips]
- b. International travel [If Q3= cancelled or suspended at least a few international trips]

	2 months	3 Months	6 Months	8 Months	12 Months	More than 12 months	Not sure
Domestic travel	29%	30%	21%	4%	2%	1%	15%
International travel	84%	14%	36%	11%	9%	4%	23%

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]**

- l. China
- m. Hong Kong
- n. Taiwan
- o. Other Asia Pacific countries (e.g., Japan, South Korea, Malaysia)
- p. Europe
- q. United States
- r. Canada
- s. Latin America
- t. Middle East/Africa
- u. All international travel
- v. All Domestic travel



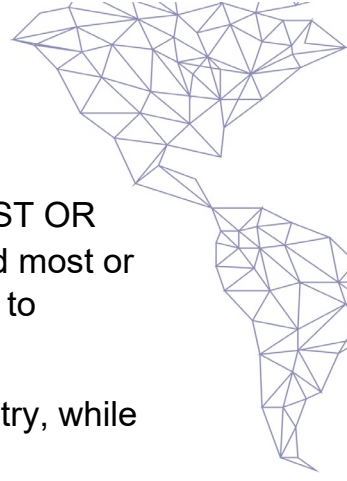


	We plan to resume travel in the near future	We have considered resuming travel in the near future, but do not have definite plans	We do not plan to resume travel in the near future	Not Sure
China	11%	34%	36%	19%
Hong Kong	9%	36%	35%	20%
Taiwan	9%	35%	36%	21%
Other APAC	11%	36%	34%	19%
Europe	16%	43%	25%	16%
United States	28%	44%	16%	12%
Canada	24%	41%	20%	16%
Latin America	11%	37%	32%	19%
Middle East	9%	36%	35%	20%
All International	10%	42%	29%	19%
All Domestic Travel	35%	45%	10%	11%
All Travel (Domestic and International)	15%	54%	14%	17%

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: 35%
- We will wait until we feel comfortable resuming travel anywhere in the country: 43%
- Other: 10%
- Not sure: 12%





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: 36%
- We will wait until we feel comfortable resuming travel anywhere in the country: 50%
- Other: 8%
- Not sure: 6%

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: 15%
- Some employees will be willing to travel: 47%
- A few employees will be willing to travel: 20%
- Most employees will be unwilling to travel: 5%

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

- Frequently: 83%
- Occasionally: 12%
- Rarely: 4%
- Never: 2%

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

- We have canceled or suspended all business trips: 56%
- We have canceled or suspended all non-essential trips, but still allow some essential travel: 37%
- 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: 2%
- We generally have not canceled or suspended business trips: 0%
- Other _____ Please specify: 3%





11. Do you think the coronavirus will change the way your company conducts business once there is no more threat from the disease?

- Yes: 77%
- No: 8%
- Don't know: 15%

12. [If buyer or procurement] Has your company taken the following actions as a result of the coronavirus? - **Reduced staff or laid off employees**

- Yes: 46%
- No: 50%
- Don't know: 5%

13. [If buyer or procurement] Has your company taken the following actions as a result of the coronavirus? - **Furloughed employees**

- Yes: 45%
- No: 50%
- Don't know: 5%

14. [If buyer or procurement] Has your company taken the following actions as a result of the coronavirus? - **Pay cuts for employees**

- Yes: 44%
- No: 49%
- Don't know: 7%

15. [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?

- 48% - Global Average of Buyers and Procurement

16. [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: 28%
- I feel the same as last week: 56%
- I am more pessimistic than I was last week: 17%





17. 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.

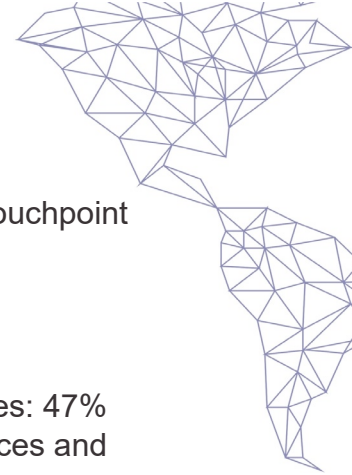
- Increase cleaning standards to exceed current cleaning protocols: 80%
- Require employees to wear face masks: 55%
- Provide additional staff training about COVID-19 sanitary practices and incident reporting: 53%
- Increase communication about hotel sanitation practices: 44%
- Require guests to wear face masks in common areas: 43%
- Enforce physical distancing guidelines: 43%
- Provide all guests with safety information concerning their hotel stay: 40%
- Place signs throughout the property to remind guests and employees of best sanitation practices: 35%
- Provide face masks to guests: 24%
- Guests must request housekeeping to limit the number of people in a room: 20%
- Other: 6%
- Not sure: 2%
- None of the above: 0%

18. 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: 70%
- Provide hand sanitizer and disinfectant wipes for customers: 68%
- Require drivers to wear face masks and gloves: 58%
- Install partition to separate the passenger from driver: 52%
- Train drivers about sanitary practices: 43%
- Provide additional staff training about COVID-19 sanitary practices and incident reporting: 36%
- Require passengers to wear face masks and gloves: 34%
- 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: 27%
- Provide face masks and gloves to passengers: 16%
- Other: 3%
- Not sure: 4%
- None of the above: 1%

19. 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.





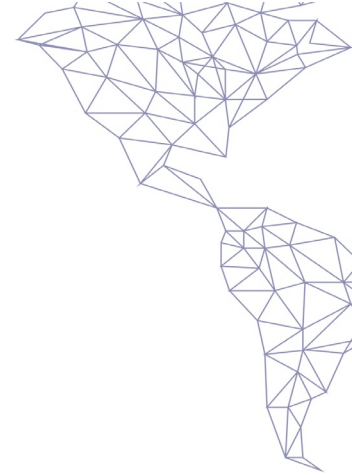
- Increase airplane cleaning standards to ensure every traveler touchpoint is sanitized before each flight: 76%
- Require all passengers wear masks: 60%
- Keep middle seats empty: 59%
- Require employees wear face masks and gloves: 52%
- Provide all passengers with hand sanitizer and disinfectant wipes: 47%
- Provide additional staff training about COVID-19 sanitary practices and incident reporting: 29%
- Provide all passengers with masks: 23%
- Suspend or reduce inflight food and beverage service: 17%
- Other: 5%
- Not sure: 2%
- None of the above: 0%

20. 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	48%	36%	15%	1%
Information about operational changes such as flight rescheduling or check-in procedures	28%	43%	28%	1%
Safety procedures at airports	18%	41%	40%	1%
Supplier cancellation or change policies/waivers	37%	41%	21%	1%
Vendor staff training on best practices to ensure traveler safety	24%	45%	28%	3%
Third-party inspection/verification of supplier sanitation practices	15%	35%	45%	4%

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





- Within one month: 12%
- Within 3 months: 28%
- Within 6 months: 21%
- Within 8 months: 7%
- In 2021: 15%
- Don't know: 18%

22. 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%	8%	90%
Stay-at-home lockdowns removed	4%	11%	85%
Other companies allowing travel	22%	31%	47%
Public health guidelines or statements (e.g., WHO or U.S. CDC)	3%	9%	88%
Advice from a risk management firm/consultant (e.g., WorldAware or International SOS)	12%	23%	64%
New Coronavirus vaccine developed and available for your employees	3%	9%	87%
Effective anti-viral treatments that could make infections less lethal	2%	9%	89%
Rate of new infections declines	1%	8%	91%

