

2021 Coronavirus Poll April 22, 2021



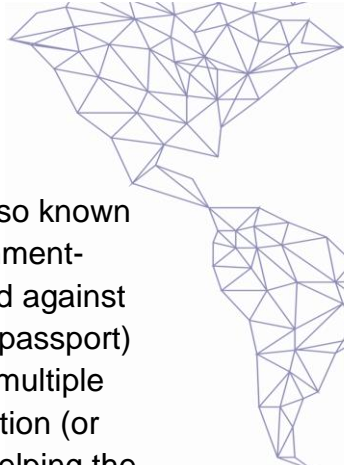
POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 45%
- Procurement/sourcing professional: 10%
- Supplier: 28%
- TMC: 8%
- Other: 9%

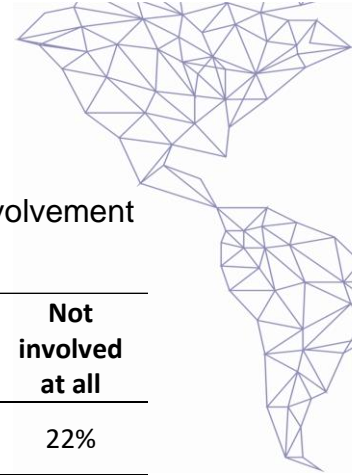
2. [If supplier or TMC]: Which of the following best describes the company you work for?

- Hotel chain: 29%
- Travel management company: 23%
- Ground transportation: 8%
- Individual hotel property: 6%
- Travel technology: 9%
- Airline: 11%
- Meetings management provider: 2%
- Payment company: 2%
- Other: 10%

- 
3. 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: 33%
 - Somewhat effective: 38%
 - Neither effective nor ineffective: 7%
 - Ineffective: 5%
 - Very ineffective: 5%
 - Don’t know: 10%

 4. [DISPLAY IF Q1=US] In the United States, the Centers for Disease Control and Prevention (CDC) recently issued new guidance for travel... Has the CDC's updated guidance made you personally...?
 - Much more comfortable about traveling for business: 29%
 - Somewhat more comfortable about traveling for business: 35%
 - No change in opinion: 32%
 - Somewhat less comfortable about traveling for business: 3%
 - Much less comfortable about traveling for business: 1%
 - Not sure: 1%

 5. [DISPLAY IF Q1=US AND Q2=BUYER/PROCUREMENT] To what extent will the CDC’s new guidance influence your company’s timeline for resuming non-essential domestic business travel?
 - It will have major influence: 11%
 - It will have some influence: 41%
 - It will have minor influence: 18%
 - It will not have any influence at all: 15%
 - Not sure: 14%



6. DISPLAY IF Q2=BUYER/PROCUREMENT] Please rate your personal involvement with. . .

Personal involvement with . . .	Very involved	Involved	Neither involved nor uninvolved	Not involved	Not involved at all
“Return to the office” planning	13%	26%	13%	26%	22%
Remote working policies	7%	16%	16%	34%	28%
Company’s approach to managing a decentralized workforce	5%	13%	17%	34%	30%

7. 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: 35%
- Employees will have more flexibility to work from home after the pandemic than they did before the pandemic: 47%
- Employees will have equal flexibility to work from home after the pandemic as they did before the pandemic: 14%
- Employees will have less flexibility to work from home after the pandemic than they did before the pandemic: 2%
- Employees will have much less flexibility to work from home after the pandemic than they did before the pandemic: 1%

8. You mentioned you expect your company’s employees will have more flexibility to work from home in the future. This could have implications for travel and expense policies. For instance, remote workers might need to purchase office supplies that they would otherwise use for free at the office. In some cases, remote workers might hold business meetings at restaurants or coffee shops instead of using office space. Is your company likely to revise its travel and expense policies to account for an increase in remote working?

- Very likely: 16%
- Somewhat likely: 35%
- Neither likely nor unlikely: 13%
- Not likely: 18%
- Not likely at all: 4%
- Not sure: 15%





9. Thinking about your company, what do you think the impact of increased workplace flexibility, working from home and alternative meeting venues will have on future Travel and Expense (T&E) budgets compared to previous budgets?

- Travel and Expense budgets will increase significantly: 2%
- Travel and Expense budgets will increase slightly: 12%
- Travel and Expense budgets will neither increase nor decrease: 25%
- Travel and Expense budgets will decrease slightly: 34%
- Travel and Expense budgets will decrease significantly: 17%
- Don't know: 10%

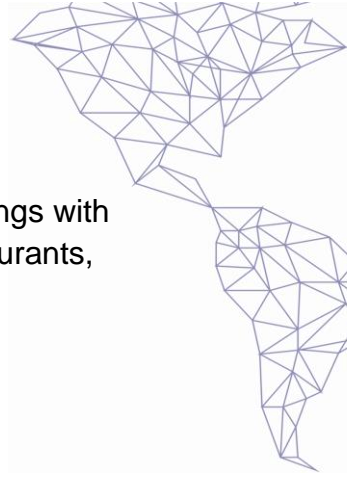
10. Which of the following best describes the current state of your company's "return to travel" planning efforts?

Working on developing a timeline for resuming travel, updating travel policies, or developing new safety resources or information for travelers	31%
Have begun working on a timeline for resuming travel, updating travel policies, or developing new safety resources or information for travelers – but still have lots of work to do	20%
Might have thought about resuming business travel, have not done any formal planning	18%
Fully developed plan for resuming business travel: This might include a timeline for resuming travel, updated travel policies, or new safety resources or information for travelers	13%
Our company has already resumed non-essential business travel	9%
Not sure	7%
Other	3%

11. Which best describes your company's "return to travel" planning efforts?

- The travel department/ team is leading our "return to travel" planning efforts: 11%
- Another department is leading our "return to travel" planning efforts (e.g., C-suite, security, HR): 25%
- A cross-department committee/working group is leading our "return to travel" planning efforts (Note: this could include travel, HR, security, legal, and other departments): 56%
- Other: 8%





12. As domestic business travel increases, do you think more business meetings with clients and customers will be held in non-traditional settings such as restaurants, bars, coffee shops, flexible office spaces and/or hotels?

- Yes: 44%
- No: 27%
- Don't know: 29%

13. Have your job responsibilities changed during the pandemic?

- Yes: 49%
- No: 51%

14. [DISPLAY IF Q13=YES] You mentioned your job responsibilities have changed due to the pandemic. How have your job responsibilities pertaining to business travel changed? Please select all that apply

- I have more responsibilities than I did before the pandemic: 72%
- Travel policy decisions involve more people and departments: 31%
- I report to a different person or department than I did before the pandemic: 17%
- I have had responsibilities taken away from me: 5%
- I have more people reporting to me: 8%
- I have fewer people reporting to me: 16%
- I need to receive approval from more people/departments to enact changes to our travel policy: 15%
- Other: 13%
- Not sure: 3%

15. [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: 12%
- Somewhat willing: 53%
- Neither willing nor unwilling: 12%
- Not willing: 10%
- Not willing at all: 2%
- Not sure: 11%





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

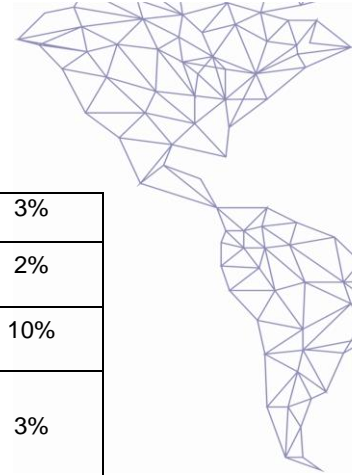
- Very optimistic: 9%
- Optimistic: 45%
- Neither optimistic nor pessimistic: 14%
- Pessimistic: 23%
- Very pessimistic: 3%
- Not sure: 2%

17. 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	67%	24%	5%	2%	2%
Hong Kong	69%	26%	3%	2%	1%
Taiwan	70%	24%	4%	2%	1%
Other APAC	64%	28%	5%	2%	1%
Europe	54%	35%	6%	3%	2%
United States	26%	41%	16%	8%	9%
Canada	52%	32%	8%	4%	4%
Latin America	57%	29%	7%	3%	3%





Middle East	60%	29%	5%	3%	3%
All International	50%	39%	6%	4%	2%
All Domestic Travel	14%	47%	18%	10%	10%
All Travel (Domestic and International)	19%	57%	16%	6%	3%

18. 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
China	9%	47%	33%	11%
Hong Kong	9%	49%	30%	12%
Taiwan	8%	48%	30%	14%
Asia Pacific (minus China, Hong Kong and Taiwan)	8%	51%	29%	12%
Europe	15%	51%	22%	13%
Latin America	8%	49%	30%	12%
United States	29%	49%	14%	8%
Canada	18%	52%	18%	12%
Middle East	7%	50%	29%	14%
All International Travel	10%	54%	24%	13%
All Domestic Travel	37%	42%	9%	11%
All Travel	16%	59%	13%	12%

19. [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 than I was last month: 50%
- I feel the same as last month: 43%
- I am more pessimistic than I was last month: 8%



20. [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: 50%
- Our bookings have remained the same: 38%
- Our bookings have decreased: 11%

