

2021 Coronavirus Poll January 21, 2021



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 50%
- Procurement/sourcing professional: 7%
- Supplier: 27%
- TMC: 9%
- Other: 8%

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

- Hotel chain: 30%
- Travel management company: 25%
- Ground transportation: 8%
- Individual hotel property: 7%
- Travel technology: 8%
- Airline: 9%
- Meetings management provider: 2%
- Payment company: 1%
- Other: 1%



3. [DISPLAY IF Q2=BUYER OR PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

- Very willing: 6%
- Somewhat willing: 43%
- Neither willing nor unwilling: 19%
- Not willing: 20%
- Not willing at all: 4%
- Not sure: 9%

4. [DISPLAY IF Q2=SUPPLIER OR TMC] In the current environment, how do you feel about the financial prospects of companies in the business travel sector?

- Very optimistic: 0%
- Optimistic: 28%
- Neither optimistic nor pessimistic: 26%
- Pessimistic: 31%
- Very pessimistic: 11%
- Not sure: 3%

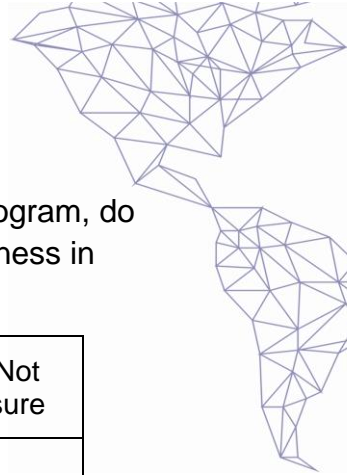
5. Thinking about your company, when does it plan to have most of its employees return to the office

- Most of our company's employees have already returned to the office: 8%
- 1-4 months: 17%
- 5-8 months: 29%
- 9months or longer: 10%
- Still have not decided: 26%
- Not sure: 11%

6. Still thinking about your company, when do you think it is most likely to resume non-business critical travel?

- My company has already resumed non-business critical travel: 6%
- 1-4 months: 13%
- 5-8 months: 29%
- 9months or longer: 20%
- Still have not decided: 20%
- Not sure: 11%





7. [DISPLAY IF Q2=BUYER/PROCUREMENT] Thinking about your travel program, do you plan to require employees to do the following before traveling for business in 2021?

| | Yes - we already require it | Yes - we plan to require it | No - we don't plan to require it | Not sure |
|--|-----------------------------|-----------------------------|----------------------------------|----------|
| Certify to our company that they have tested negative for the virus prior to departure | 9% | 8% | 30% | 53% |
| Share test results with our company prior to departure | 6% | 5% | 34% | 55% |
| Certify to our company that they have received a coronavirus vaccine | 1% | 8% | 26% | 65% |
| Share record of receiving coronavirus vaccine with our company | 1% | 8% | 27% | 65% |

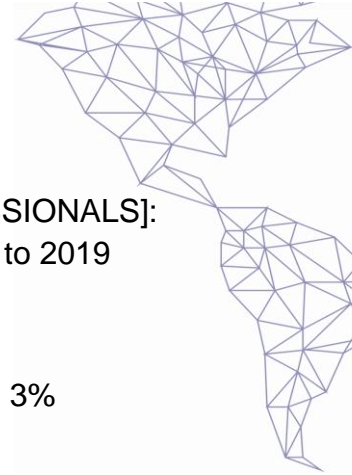
8. [DISPLAY IF Q2=BUYER/PROCUREMENT] Please rate your comfort with travel suppliers—such as airlines or hotels—using mobile apps to verify the health status of passengers.

- Very comfortable: 12%
- Comfortable: 32%
- Neither comfortable nor uncomfortable: 19%
- Not comfortable: 11%
- Not comfortable at all: 10%
- Not sure: 16%

9. When administering the coronavirus vaccine, some countries have given priority to essential workers. These workers represent a variety of different sectors. Some have advocated for classifying certain travel industry workers—such as flight attendants, pilots, and hotel employees – as essential workers. This could allow them to receive their vaccination before the general population. To what extent would this make you feel more comfortable about your company’s employees traveling on business?

- A great deal: 28%
- Somewhat: 37%
- A little bit: 18%
- Not at all: 8%
- Not sure: 9%





10. [FILTERED FOR TRAVEL MANAGERS AND PROCUREMENT PROFESSIONALS]:
 What do you think your company’s travel spend will be in 2021 compared to 2019 (i.e., pre-pandemic)?

- The 2021 travel spend will be higher than 2019: 1%
- The 2021 travel spend will be approximately the same as 2019: 3%
- The 2021 travel spend will be lower than 2019: 90%
- Don’t know: 6%

11. [DISPLAY IF Q4=LOWER] You said you expect your company’s 2021 travel spend will be lower in 2021 compared to 2019. Approximately how much lower is your company’s 2021 travel budget compared to 2019?

- Mean = 52.44%

12. Has your company begun planning to host or attend meetings and/or events for 2021?

- Yes: 29%
- No: 58%
- Don’t know: 13%

13. [DISPLAY IF Q12=YES] Thinking about the events and meetings you expect your employees to attend, when do you expect these events to begin?

| | Q1 2021 | Q2 2021 | Q3 2021 | Q4 2021 | 2022 | Not Sure |
|--|---------|---------|---------|---------|------|----------|
| In-person meetings or events with attendees outside your company | 10% | 25% | 40% | 12% | 3% | 10% |
| Internal company meetings or events held in-person | 23% | 27% | 28% | 8% | 1% | 10% |
| Hybrid meetings/events (in-person and remote attendees) | 34% | 28% | 21% | 5% | 1% | 10% |





14. 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 | 66% | 27% | 4% | 2% | 1% |
| Hong Kong | 68% | 25% | 4% | 1% | 1% |
| Taiwan | 67% | 26% | 5% | 1% | 1% |
| Other APAC | 60% | 31% | 6% | 2% | 1% |
| Europe | 50% | 40% | 6% | 3% | 2% |
| United States | 31% | 46% | 12% | 5% | 5% |
| Canada | 49% | 37% | 8% | 3% | 4% |
| Latin America | 55% | 36% | 5% | 2% | 2% |
| Middle East | 57% | 35% | 5% | 2% | 1% |
| All International | 48% | 42% | 7% | 2% | 1% |
| All Domestic Travel | 20% | 48% | 16% | 7% | 8% |
| All Travel (Domestic and International) | 23% | 56% | 13% | 5% | 2% |





15. 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 | 5% | 44% | 35% | 16% |
| Hong Kong | 4% | 42% | 36% | 18% |
| Taiwan | 4% | 43% | 33% | 20% |
| Asia Pacific (minus China, Hong Kong and Taiwan) | 5% | 44% | 33% | 18% |
| Europe | 10% | 46% | 28% | 16% |
| Latin America | 6% | 44% | 35% | 15% |
| United States | 12% | 51% | 26% | 11% |
| Canada | 9% | 48% | 29% | 15% |
| Middle East | 6% | 43% | 35% | 16% |
| All International Travel | 5% | 49% | 32% | 14% |
| All Domestic Travel | 16% | 54% | 19% | 11% |
| All Travel | 6% | 53% | 27% | 14% |

16. The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a month ago, how do you feel about the industry's path to recovery?

- I am more optimistic than I was last month: 21%
- I feel the same as last month: 54%
- I am more pessimistic than I was last month: 25%

17. 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: 9%
- Our bookings have remained the same: 55%
- Our bookings have decreased: 25%
- Not sure: 10%

