

2021 Coronavirus Poll March 18, 2021



POLL RESULTS

1. Which of the following best describes you?

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

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: 6%
- Individual hotel property: 8%
- Travel technology: 8%
- Airline: 10%
- Meetings management provider: 2%
- Payment company: 2%
- Other: 8%



3. Some countries are considering implementing Digital Health Verification (also known as "vaccination passports") which are government-issued cards or smartphone badges stating the bearer has been inoculated against the coronavirus. The purpose of the vaccine passport is to open-up travel and eliminate the need for mandated quarantine and multiple tests. Thinking about government-issued vaccine passports, what statement is closest to your opinion?

- It is a good policy: 66%
- I am indifferent to policy: 15%
- It is a bad policy: 11%
- Don't know: 8%

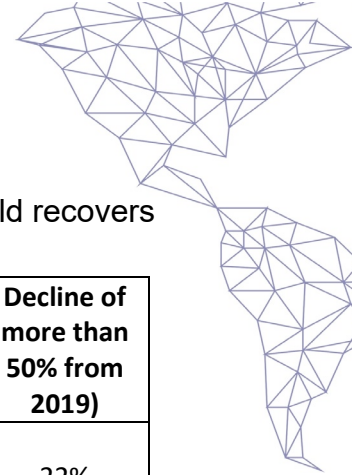
4. [DISPLAY IF Q4=GOOD POLICY] You mentioned you think issuing vaccine passport is a good policy. Why do you think this is a good policy? Please select up to three reasons.

- It will help employees safely resume business travel (77%)
- It is a quick and easy way to prove people have been vaccinated (64%)
- It will eliminate the need to quarantine (57%)
- It will help promote economic growth (34%)
- Our customers and clients will feel safe with having face-to-face meetings if they know our employee has tested negative (24%)
- It will help open meetings and conferences (22%)
- Other: 3%
- Don't know: 0%

5. [DISPLAY IF Q4=BAD POLICY] You mentioned you think issuing vaccine passport is a bad policy. Why do you think this is a bad policy? Please select up to three reasons.

- Privacy concerns (73%)
- It punishes countries who do not issue health passports (40%)
- It is unnecessary (30%)
- It will be difficult to enforce (27%)
- It will take too long to implement (19%)
- It can be forged (17%)
- It may not be recognized internationally (17%)
- Other: 31%
- Don't know: 0%





6. How do you think business travel will resume at your company as the world recovers from COVID-19?

	Significantly more than 2019 (50%+)	More than 2019 (up to 50% more)	About the same as 2019	Lower than 2019 levels (decline of 50% or less)	Decline of more than 50% from 2019)
Face-to-face offsite non-sales customer or client meetings	3%	7%	18%	50%	22%
Face-to-face offsite sales visits to current customers or clients	4%	8%	22%	52%	15%
Face-to-face offsite sales visits to prospective customers or clients	3%	8%	27%	46%	16%
Face-to-face internal strategy meetings	4%	8%	19%	46%	23%
Virtual non-sales calls with customers or clients	24%	37%	18%	17%	5%
Virtual sales calls with current customers or clients	22%	41%	19%	14%	3%
Virtual sales calls with prospective clients	22%	42%	19%	13%	4%
Virtual internal staff meetings	32%	32%	18%	12%	6%

7. Assuming you receive a Covid-19 vaccine in the next couple months, how do you think you will feel about traveling for business in 2021?

- I will feel very comfortable about traveling for business after receiving the vaccine: 49%
- I will feel somewhat comfortable about traveling for business after receiving the vaccine: 36%
- Neither comfortable nor uncomfortable: 10%





- I will not feel comfortable traveling for business even after receiving the vaccine: 6%
- I will not feel comfortable at all traveling for business even after receiving the vaccine: 1%

8. [DISPLAY IF Q1=BUYER/PROCUREMENT] When business travel resumes at your company, do you think travelers will be more or less likely to use the following providers or services?

	More likely than before the pandemic	Equally likely as before the pandemic	Less likely than before the pandemic	Not sure
Traditional hotels	11%	84%	5%	1%
Serviced apartment rentals (e.g., Oakwood)	9%	51%	18%	22%
Home-share services (e.g., Airbnb)	7%	34%	36%	23%
Ride-hailing mobile apps (e.g., Uber, Lyft, or FREE NOW)	8%	65%	20%	7%
Traditional taxis	4%	54%	35%	7%
Rental cars	29%	63%	6%	2%
Chauffeured ground transportation	12%	69%	11%	8%

9. [DISPLAY IF Q1=BUYER/PROCUREMENT] When do you think your company will resume...

	Already resumed	1 st Half of 2021	2 nd Half of 2021	2022
Non-essential domestic business travel	7%	9%	60%	24%
Non-essential international business travel	1%	4%	39%	56%





10. DISPLAY IF Q1=BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 9%
- Somewhat willing: 46%
- Neither willing nor unwilling: 17%
- Not willing: 16%
- Not willing at all: 5%
- Not sure: 8%

11. [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: 4%
- Optimistic: 42%
- Neither optimistic nor pessimistic: 14%
- Pessimistic: 30%
- Very pessimistic: 3%
- Not sure: 6%

12. In light of the vaccination programs and decline in Covid-19 cases, when does your company plan to have most (if not all) employees return to the office?

- We are currently: 7%
- 1-3 months: 13%
- 4-6 months: 38%
- 7-9 months: 23%
- 10-12 months: 11%
- More than 12 months: 8%

13. After your office reopens to employees, do you expect they will commute to the office less frequently than they did before the pandemic?

- Yes, employees will spend fewer days in the office: 77%
- Yes, employees will work entirely remotely: 3%
- No, employees will come into the office the same number of days before the pandemic: 12%
- Don't know: 8%





14. DISPLAY IF Q14=YES (FEWER DAYS OR ENTIRELY REMOTE] You mentioned you expect employees will come to the office fewer days than they did before the pandemic. How do you think employee domestic business travel will change as a result of spending fewer days?

- There will be more domestic business travel: 6%
- There will be about the same amount of business travel: 27%
- There will be less domestic business travel: 61%
- Don't know: 6%

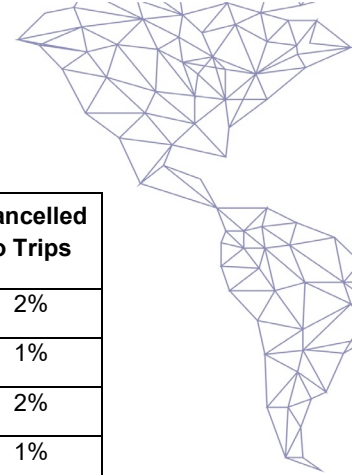
15. In the current environment, what do you view as the single greatest barrier to business travel?

- Government policies that restrict travel or make it difficult (e.g., entry restrictions or mandatory quarantines): 49%
- Company policies restricting employees from traveling: 25%
- Employee unwillingness/reluctance to travel: 11%
- Travel budget freeze/ cost savings: 10%
- Other: 4%
- Don't know: 1%

16. 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



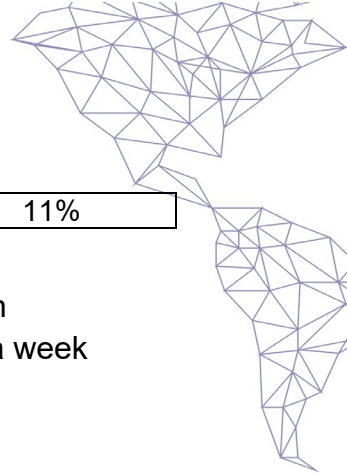


	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
China	70%	22%	4%	3%	2%
Hong Kong	69%	25%	2%	2%	1%
Taiwan	68%	25%	3%	3%	2%
Other APAC	63%	30%	5%	2%	1%
Europe	54%	36%	6%	3%	1%
United States	34%	41%	13%	6%	6%
Canada	59%	29%	6%	6%	1%
Latin America	62%	28%	4%	4%	1%
Middle East	61%	29%	5%	4%	2%
All International	50%	39%	6%	3%	1%
All Domestic Travel	20%	49%	16%	8%	8%
All Travel (Domestic and International)	24%	60%	11%	4%	1%

17. 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	4%	46%	36%	14%
Hong Kong	5%	46%	33%	16%
Taiwan	4%	47%	32%	17%
Asia Pacific (minus China, Hong Kong and Taiwan)	8%	47%	30%	16%
Europe	13%	52%	23%	12%
Latin America	5%	50%	30%	16%
United States	19%	53%	18%	10%
Canada	14%	53%	20%	12%
Middle East	6%	48%	31%	15%
All International Travel	8%	56%	25%	11%
All Domestic Travel	28%	51%	12%	10%





All Travel	13%	60%	17%	11%
------------	-----	-----	-----	-----

18. [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: 52%
- I feel the same as last month: 44%
- I am more pessimistic than I was last month: 4%

19. [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: 40%
- Our bookings have remained the same: 48%
- Our bookings have decreased: 7%
- Not sure: 6%
- ve decreased: 23%

