

2020 Coronavirus Poll August 13, 2020



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 47%
- Procurement/sourcing professional: 6%
- Supplier: 28%
- TMC: 12%
- Other: 7%

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

- Hotel chain: 28%
- Travel management company: 28%
- Ground transportation: 9%
- Individual hotel property: 8%
- Travel technology: 10%
- Airline: 6%
- Meetings management provider: 2 %
- Payment company: 2%
- Other: 8%



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	71%	26%	2%	1%	1%
Hong Kong	73%	23%	3%	1%	1%
Taiwan	71%	24%	2%	1%	1%
Other APAC	66%	28%	4%	1%	1%
Europe	55%	35%	6%	2%	2%
United States	41%	41%	9%	5%	3%
Canada	57%	31%	7%	2%	2%
Latin America	68%	25%	4%	1%	2%
Middle East	67%	26%	4%	1%	2%
All International	56%	37%	5%	1%	1%
All Domestic Travel	27%	47%	14%	6%	6%
All Travel (Domestic and International)	32%	53%	11%	4%	1%





4. [DISPLAY IF Q1=A EUROPEAN COUNTRY] Thinking about your company, what is your current policy about international travel to other European countries?

- We generally have the same or similar policies for all European countries: 64%
- Our policies vary depending on the country: 31%
- Other, please specify: 1%
- Unsure: 3%

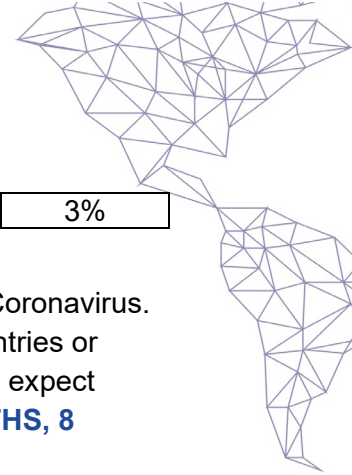
5. [DISPLAY IF Q1=A EUROPEAN COUNTRY] Thinking about your company, how has the coronavirus impacted business travel to...

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
Germany	30%	51%	9%	8%	3%
United Kingdom	39%	48%	4%	4%	4%
France	38%	47%	7%	3%	4%
Spain	53%	38%	6%	2%	1%
Italy	48%	44%	3%	3%	1%
Netherlands	39%	49%	6%	2%	4%
Belgium	47%	44%	6%	4%	0%
Switzerland	38%	50%	6%	5%	1%
Austria	41%	44%	5%	5%	6%
Ireland	43%	43%	6%	4%	4%
Sweden	46%	42%	5%	4%	4%
Norway	41%	46%	6%	3%	5%
Finland	43%	44%	4%	5%	4%
Denmark	38%	49%	3%	4%	6%

6. [DISPLAY IF Q1=A EUROPEAN COUNTRY] In the current environment, how would you rate your concern about business travel to the following countries?

	Very Concerned	Concerned	Neither Concerned nor Unconcerned	Not Concerned	Not at all Concerned
Germany	7%	59%	20%	13%	2%
United Kingdom	23%	60%	12%	2%	2%
France	14%	64%	13%	7%	2%
Spain	33%	55%	9%	2%	1%
Italy	18%	59%	16%	5%	1%
Netherlands	8%	63%	21%	8%	1%
Belgium	21%	57%	17%	4%	1%
Switzerland	9%	53%	24%	12%	2%
Austria	10%	53%	25%	10%	2%
Ireland	9%	56%	22%	8%	1%
Sweden	18%	55%	18%	8%	1%
Norway	8%	49%	26%	13%	3%
Finland	8%	47%	31%	10%	3%





Denmark	8%	49%	29%	10%	3%
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7. 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	18%	17%	31%	8%	5%	2%	19%
International travel	5%	7%	30%	15%	14%	6%	24%

8. Thinking about your expectations during the early months of the pandemic (e.g., March 2020), would you say that. . .

Business travel has resumed more quickly than I had expected	Business travel has resumed about as quickly as I had expected	Business travel has resumed more slowly than I had expected
4%	18%	78%

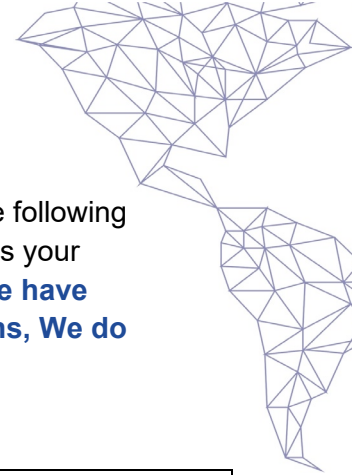
9. Thinking about your company, how do you think the number of business trips will change in the next three years assuming a vaccine or other public health measures eliminate or greatly reduce the risk from COVID-19?

- Our number of business trips will exceed their pre-pandemic level within the next three years: 4%
- Our number of business trips will return to their pre-pandemic level within the next three years - but might not exceed it: 42%
- Our number of business trips will not recover to their pre-pandemic level within the next three years: 39%
- Not sure: 14%

10. Does your company’s “Return to the Office” plans directly correlate with “Return to Business Travel?”

- Yes: 22%
- No: 63%
- Don’t know: 15%



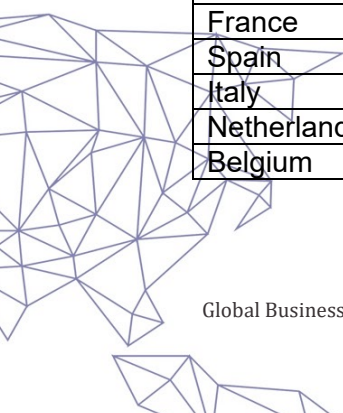


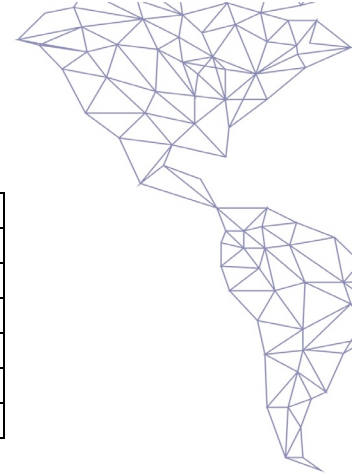
11. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company’s position **[MATRIX: We plan to resume travel in the near future, We have considered resuming travel in the near future, but do not have definite plans, We do not plan to resume travel in the near future, Not sure]**

	We plan to resume travel in the near future (1-3 months)	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	9%	34%	39%	18%
Hong Kong	8%	34%	39%	19%
Taiwan	11%	31%	39%	19%
Other APAC	11%	35%	35%	19%
Europe	15%	38%	29%	18%
United States	18%	42%	27%	14%
Canada	16%	36%	30%	18%
Latin America	9%	34%	36%	21%
Middle East	8%	34%	39%	18%
All International	9%	39%	34%	18%
All Domestic Travel	26%	40%	20%	14%
All Travel (Domestic and International)	14%	47%	24%	15%

12. CARRY FORWARD IF Q6= MOST OR ALL TRIPS; EUROPEANS ONLY] You mentioned your company has canceled or suspended most or all trips to the following countries. Thinking about each country, which best describes your company’s position?

	We plan to resume travel in the near future (1-3 months)	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
Germany	36%	37%	18%	9%
United Kingdom	30%	44%	18%	8%
France	30%	41%	21%	8%
Spain	24%	35%	25%	15%
Italy	23%	49%	18%	16%
Netherlands	24%	47%	21%	9%
Belgium	23%	42%	23%	12%





Switzerland	30%	40%	20%	10%
Austria	29%	42%	18%	11%
Ireland	21%	44%	25%	10%
Sweden	20%	48%	20%	12%
Norway	23%	46%	20%	11%
Finland	24%	45%	17%	14%
Denmark	27%	42%	19%	11%

13. [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: 21%
- Some employees will be willing to travel: 50%
- A few employees will be willing to travel: 19%
- Most employees will be unwilling to travel: 1%
- Don’t know: 10%

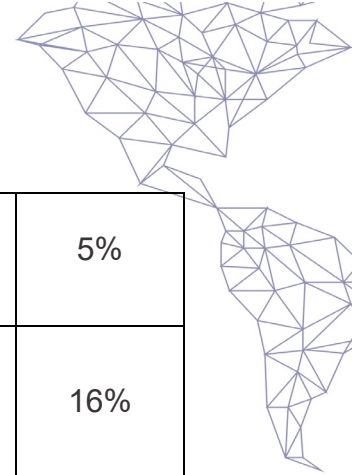
14. [DISPLAY IF Q2=SUPPLIER OR TMC] The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a week ago, how do you feel about the industry’s path to recovery?

- I am more optimistic than I was last week: 5%
- I feel the same as last week: 60%
- I am more pessimistic than I was last week: 36%

15. [DISPLAY IF Q2=BUYER OR PROCUREMENT] As a result of the pandemic, do you think your company is more or less likely to take the following actions?

	More likely than before the pandemic	Neither more nor less likely	Less likely than before the pandemic	Not sure
Include dynamic rates in our hotel program	33%	42%	9%	17%
Allow travelers to book “restricted” airfares or hotel rates (e.g., basic economy or light” airfares; non-refundable hotel rates)	5%	47%	40%	8%
Allow travelers to book directly with suppliers	2%	27%	66%	5%





Allow travelers to book with OTAs (e.g., Expedia or Booking.com)	3%	27%	65%	5%
Adopt off-channel booking capture technology (e.g., SAP Concur TripLink, Traxo, CapTrav)	14%	45%	25%	16%

16. [DISPLAY IF Q3=AIRLINE, HOTEL CHAIN, HOTEL PROPERTY, TMC, OR GROUND] 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: 20%
- Our bookings have remained the same: 50%
- bookings have decreased: 30%

DISPLAY IF Q2=BUYER OR PROCUREMENT] Has your company revised its travel policy as a result of the coronavirus pandemic?

- Yes: 56%
- No: 44%

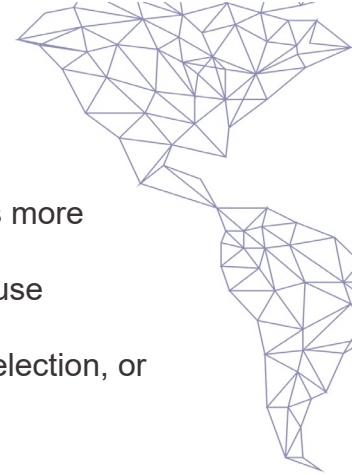
17. DISPLAY IF Q12=YES] You mentioned your company has revised its travel policy as a result of the pandemic. Thinking about your travel policy today, how much has it changed since January 2020?

- It has changed a lot: 27%
- It has changed somewhat: 44%
- It has changed a little: 26%
- It has barely changed at all: 3%

18. [DISPLAY IF Q2=BUYER OR PROCUREMENT] Thinking about your company's travel program, which of the following changes has it made as a result of the pandemic? Please select all that apply.

- New rules about pre-trip approval: 53%
- More frequent or detailed pre-trip communications or briefings: 35%
- Collecting health information from employee travelers (i.e., virus exposure or preexisting conditions): 24%
- Clarifying or changing rules about ticket credits/unused tickets: 22%
- New rules about booking channels (i.e., requiring travelers to use a TMC or corporate online booking tool: 20%





- New rules about ground transportation (i.e., allowing rental cars more frequently): 20%
- New rules about preferred suppliers (i.e., requiring travelers to use preferred airlines that allow name change waivers): 17%
- New rules about flight bookings (i.e., allowing upgrades, seat selection, or lounge passes): 15%
- Requiring travelers to sign a waiver before traveling: 11%
- Greater adoption of trip insurance/assistance: 10%
- Signing a new contract with a travel risk management firm: 5%
- Other (please specify): 8%
- None of the above: 24%

19. When thinking about the following, which best describes your view?

	The worst has already happened	The worst has yet to come	Not sure
Layoffs/furloughs in the corporate travel industry	36%	46%	19%
Cancelled flights	72%	14%	15%
Hotels suspending operations	62%	24%	14%
Revenue loss for travel companies	37%	43%	20%

20. How would you characterize your company's travel recovery plan?

- My company has not started yet: 26%
- My company has begun but we are in the initial stages (ex., collecting stakeholder insights): 28%
- My company is well underway (ex., building policies and procedures): 34%
- Fully established (the recovery plan has been developed and implemented): 12%

21. Is your company planning to provide or require your travelers to have personal protective equipment (PPE) or travel kits as an essential item for their safe return to travel?

- Yes, the company will provide it to travelers: 31%
- Yes, the individual traveler is required to provide their own: 20%
- No, we are not requiring or providing PPE for our travelers: 6%
- Not yet determined: 30%
- Don't know: 13%

