

2020 Coronavirus Poll September 24, 2020



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 39%
- Procurement/sourcing professional: 8%
- Supplier: 30%
- TMC: 12%
- Other: 12%

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

- Hotel chain: 27%
- Travel management company: 27%
- Ground transportation: 8%
- Individual hotel property: 10%
- Travel technology: 9%
- Airline: 7%
- Meetings management provider: 3%
- Payment company: 1%
- 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	73%	22%	3%	1%	%
Hong Kong	74%	23%	2%	1%	1%
Taiwan	72%	23%	2%	2%	1%
Other APAC	68%	27%	3%	1%	1%
Europe	54%	34%	6%	3%	3%
United States	38%	42%	10%	6%	4%
Canada	55%	32%	6%	4%	3%
Latin America	60%	29%	4%	2%	2%
Middle East	65%	28%	2%	2%	2%
All International	53%	39%	4%	3%	1%
All Domestic Travel	24%	46%	15%	7%	7%
All Travel (Domestic and International)	29%	56%	10%	4%	2%





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

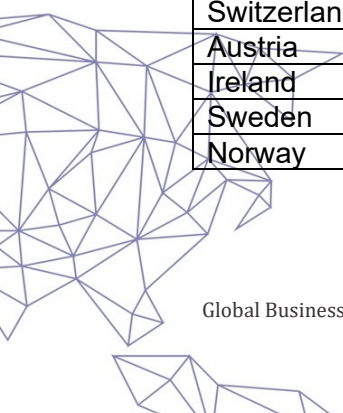
- We generally have the same or similar policies for all European countries: 61%
- Our policies vary depending on the country: 33%
- Other, please specify: 4%
- Unsure: 2%

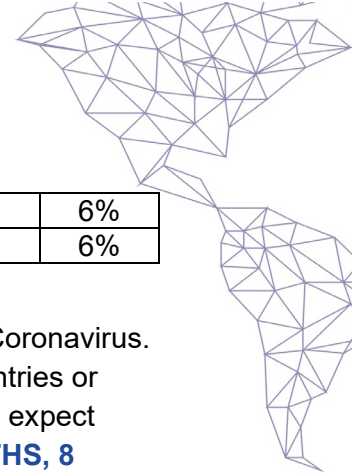
5. [DISPLAY IF Q1=A EUROPEAN COUNTRY] Thinking about your company, how has the coronavirus impacted business travel to...

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
Germany	31%	51%	8%	3%	6%
United Kingdom	36%	47%	10%	3%	4%
France	36%	44%	11%	3%	5%
Spain	43%	43%	8%	2%	4%
Italy	42%	47%	6%	1%	4%
Netherlands	38%	49%	7%	1%	4%
Belgium	43%	44%	8%	2%	4%
Switzerland	38%	45%	10%	2%	5%
Austria	40%	44%	8%	2%	6%
Ireland	40%	43%	9%	3%	5%
Sweden	39%	45%	7%	4%	5%
Norway	39%	47%	8%	2%	4%
Finland	38%	48%	8%	3%	4%
Denmark	39%	45%	8%	3%	5%

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	Not Sure
Germany	8%	42%	24%	18%	3%	5%
United Kingdom	29%	44%	13%	8%	3%	3%
France	28%	46%	14%	7%	1%	3%
Spain	35%	47%	10%	4%	0%	3%
Italy	19%	47%	21%	8%	2%	3%
Netherlands	14%	46%	23%	8%	4%	5%
Belgium	18%	48%	21%	8%	1%	5%
Switzerland	10%	47%	25%	10%	3%	5%
Austria	12%	41%	28%	10%	3%	6%
Ireland	10%	47%	23%	13%	2%	6%
Sweden	14%	45%	25%	8%	4%	4%
Norway	12%	42%	25%	13%	4%	6%





Finland	10%	46%	26%	15%	4%	6%
Denmark	11%	40%	26%	13%	3%	6%

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]**

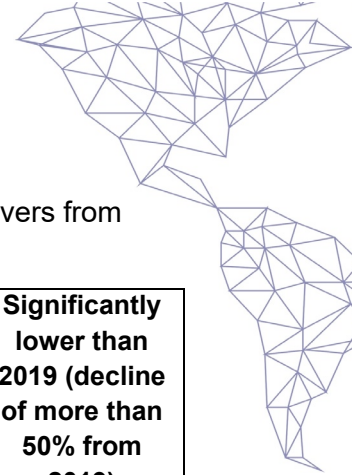
- a. Domestic travel [If Q3= cancelled or suspended at least a few domestic trips]
- b. International travel [If Q3= cancelled or suspended at least a few international trips]

	2 months	3 Months	6 Months	8 Months	12 Months	More than 12 months	Not sure
Domestic travel	14%	20%	34%	7%	8%	1%	15%
International travel	3%	7%	32%	13%	17%	6%	36%

8. 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: 6%
- 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: 36%
- Not sure: 16%



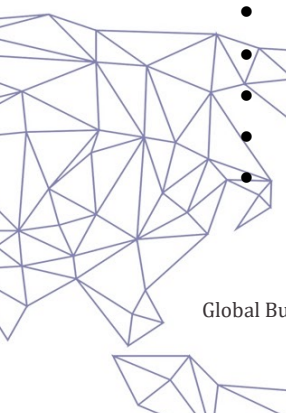


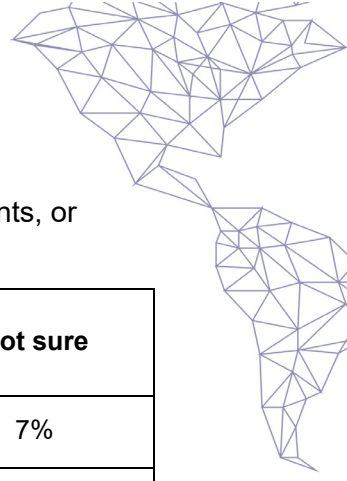
9. How do you think business travel will resume at your company as the world recovers from COVID-19?

	Significantly more than 2019 (50% or more)	More than 2019 (up to 50% more)	About the same as 2019	Lower than 2019 levels (decline of 50% or less)	Significantly lower than 2019 (decline of more than 50% from 2019)
Face-to-face offsite non-sales customer or client meetings	4%	8%	23%	43%	22%
Face-to-face offsite sales visits to current customers or clients	3%	8%	29%	42%	18%
Face-to-face offsite sales visits to prospective customers or clients	4%	9%	29%	40%	18%
Face-to-face internal strategy meetings	6%	9%	23%	41%	21%
Virtual non-sales calls with customers or clients	25%	36%	20%	13%	6%
Virtual sales calls with current customers or clients	27%	39%	21%	9%	4%
Virtual sales calls with prospective clients	24%	40%	23%	9%	3%
Virtual internal staff meetings	23%	30%	16%	10%	6%

10. When do you think employees at your company will attend in-person events and conferences?

- This year, in 2020: 3%
- The first quarter of 2021 (January- March 2021): 13%
- The second quarter of 2021 (April- June 2021): 31%
- The third quarter of 2021 (July -September 2021): 18%
- The fourth quarter of 2021(October - December 2021): 7%
- Not until 2022: 9%
- Our employees currently attend in-person events and conferences: 1%
- Other: 1%
- Don't Know: 16%





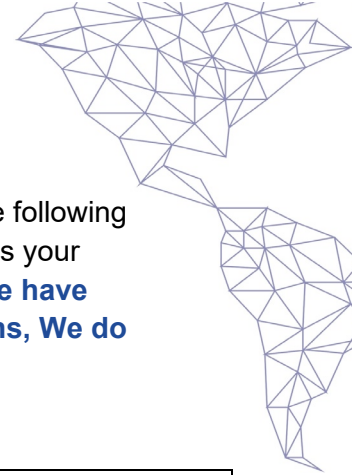
11. Thinking about your company, do you expect it will host in-person meetings, events, or conferences in...?

	No meetings or events	Yes - some meetings or events	Yes - many meetings or events	Not sure
The remainder of 2020	79%	13%	0%	7%
Q1 of 2021 (January - March 2021)	40%	35%	2%	24%
Q2 of 2021 (April - June 2021)	17%	53%	8%	23%
Q3 of 2021 (July - September 2021)	6%	50%	19%	25%
Q4 of 2021 (October - December 2021)	3%	47%	26%	22%
2022	1%	30%	46%	23%

12. Please describe your company's return to office plans:

- Will return to the office in 2020: 20%
- Will return to the office by March of 2021 (first quarter): 28%
- Will return to the office by June of 2021 (second quarter): 7%
- Will return to the office by September 2021 (third quarter): 3%
- Will return to the office by December 2021 (fourth quarter): 1%
- We will not return to the office in 2021: 4%
- Don't know: 21%
- Our company employees are already in the office: 16%



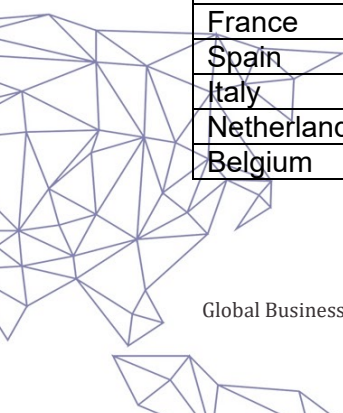


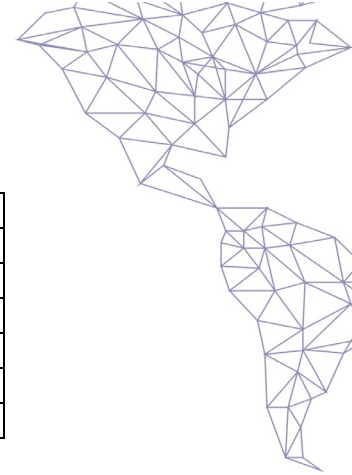
13. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company’s position **[MATRIX: We plan to resume travel in the near future, We have considered resuming travel in the near 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	8%	36%	36%	20%
Hong Kong	8%	35%	35%	23%
Taiwan	7%	33%	35%	25%
Other APAC	8%	38%	32%	22%
Europe	15%	42%	24%	18%
United States	21%	44%	22%	13%
Canada	15%	44%	24%	17%
Latin America	8%	36%	33%	22%
Middle East	9%	36%	33%	23%
All International	9%	43%	29%	19%
All Domestic Travel	27%	45%	15%	13%
All Travel (Domestic and International)	13%	49%	18%	21%

14. 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	30%	48%	13%	9%
United Kingdom	23%	47%	22%	8%
France	24%	48%	19%	9%
Spain	21%	49%	21%	10%
Italy	20%	49%	20%	11%
Netherlands	18%	53%	18%	11%
Belgium	19%	49%	21%	11%





Switzerland	20%	50%	19%	12%
Austria	19%	50%	20%	11%
Ireland	16%	54%	19%	11%
Sweden	15%	56%	16%	12%
Norway	16%	53%	20%	11%
Finland	14%	55%	20%	11%
Denmark	17%	53%	19%	11%

15. [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: 15%
- I feel the same as last week: 64%
- I am more pessimistic than I was last week: 21%

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: 29%
- Our bookings have remained the same: 54%
- bookings have decreased: 17%

17. As your company considers business travel plans in 2021, what would have the most influence on your planning process?

- Increased coronavirus testing and rapid results reporting worldwide: 8%
- Decreased COVID-19 transmission rates worldwide: 24%
- Announcement of an effective vaccine for COVID-19: 51%
- Slowing unemployment and growth in global economies: 3%
- Other (please specify): 6%
- Unsure: 7%

18. In your opinion, how has the coronavirus pandemic changed how senior leaders at your organization view the managed travel program that you have in place at your company?

- Senior leaders value our managed travel program much more than they did before the coronavirus pandemic: 11%
- Senior leaders value our managed travel program more than they did before the coronavirus pandemic: 37%



- Senior leaders value our managed travel program about the same as they did before the coronavirus pandemic: 35%
- Senior leaders value our managed travel program less than they did before the coronavirus pandemic: 3%
- Senior leaders value our managed travel program much less than they did before the coronavirus pandemic: 2%
- Not sure: 13%

19. In your opinion, how has the coronavirus pandemic changed how other stakeholders (such as human resources or the risk management department) at your organization view the managed travel program that you have in place at your company?

- Other stakeholders value our managed travel program much more than they did before the coronavirus pandemic: 17%
- Other stakeholders value our managed travel program more than they did before the coronavirus pandemic: 34%
- Other stakeholders value our managed travel program about the same as they did before the coronavirus pandemic: 34%
- Other stakeholders value our managed travel program less than they did before the coronavirus pandemic: 2%
- Other stakeholders value our managed travel program much less than they did before the coronavirus pandemic: 1%
- Not sure: 12%