

## 2020 Coronavirus Poll November 19, 2020



## POLL RESULTS

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1. Which of the following best describes you?

- Travel manager / buyer: 40%
- Procurement/sourcing professional: 8%
- Supplier: 32%
- TMC: 10%
- Other: 10%

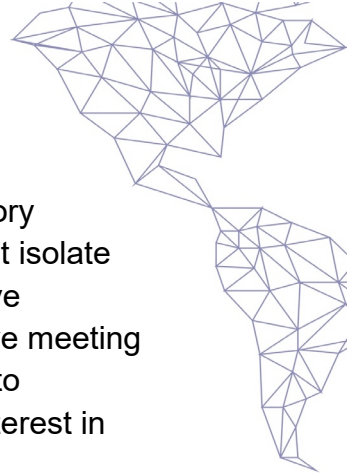
2. [If supplier or TMC]: Which of the following best describes the company you work for?

- Hotel chain: 27%
- Travel management company: 23%
- Ground transportation: 9%
- Individual hotel property: 8%
- Travel technology: 7%
- Airline: 8%
- Meetings management provider: 3%
- Payment company: 1%
- Other: 14%



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: 9%
  - Somewhat willing: 41%
  - Neither willing nor unwilling: 19%
  - Not willing: 18%
  - 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: 2%
  - Optimistic: 22%
  - Neither optimistic nor pessimistic: 25%
  - Pessimistic: 36%
  - Very pessimistic: 9%
  - Not sure: 6%
  
5. Based on the recent announcement of a possible vaccine that indicates a 90% efficacy rate in clinical trials, do you believe your company will be more likely to allow business travel and employees to attend in-person meetings in 2021?
  - Very likely: 16%
  - Likely: 44%
  - Neither likely nor unlikely: 19%
  - Not likely: 9%
  - Not likely at all: 1%
  - Not sure: 11%





6. As a result of the coronavirus, many countries have implemented mandatory quarantines for international travelers. Under these policies, travelers must isolate for a certain period upon arriving at their destination. Some advocates have proposed making an exception for short-duration business trips that involve meeting with only a few people. In such cases, business travelers would not need to quarantine even if leisure travelers would still need to. Please rate your interest in seeing this proposal adopted.

- Very interested: 28%
- Interested: 30%
- Neither interested nor uninterested: 12%
- Not interested: 16%
- Not interested at all: 6%
- Not sure: 8%

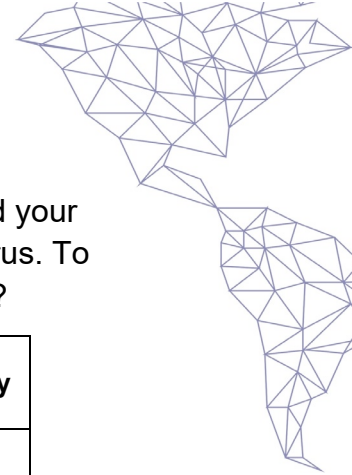
7. Has your company conducted “business continuity” planning with respect to your travel program? These exercises involve planning for the possibility that a key supplier goes bankrupt or merges with another company.

- Yes: 38%
- No: 41%
- Not sure: 21%

8. Did your company take the following actions as a result of the coronavirus?

	<b>Yes</b>	<b>No</b>	<b>Don't Know</b>
Reduced staff or laid off employees	62%	36%	2%
Furloughed employees	56%	41%	2%
Pay cuts for employees	48%	46%	6%





9. [DISPLAY IF Q9=YES FOR LAYOFFS OR FURLOUGHS] You mentioned your company has furloughed or laid off employees as a result of the coronavirus. To what extent have each of the following types of employees been affected?

	<b>Barely affected/Not affected at all</b>	<b>Somewhat affected</b>	<b>Moderately affected/Greatly affected</b>
<b>Frontline service providers</b>	5%	8%	87%
<b>Marketing/business development</b>	9%	12%	79%
<b>Back-office/operational staff</b>	8%	18%	79%
<b>Senior management/leadership</b>	24%	18%	59%

10. [DISPLAY IF Q2=BUYER OR PROCUREMENT] Travel suppliers have launched communication campaigns. Thinking about each of the following types of suppliers, how effective do you think these campaigns have been?

	<b>Effective/Very effective</b>	<b>Neither effective nor ineffective</b>	<b>Not effective/Not effective at all</b>	<b>Not sure</b>
<b>Airlines</b>	84%	9%	5%	2%
<b>Hotels</b>	78%	15%	5%	3%
<b>Ground transportation</b>	52%	30%	8%	9%
<b>Travel management companies (TMCs)</b>	51%	28%	9%	11%

11. [DISPLAY IF Q1=EUROPEAN COUNTRY AND Q2=BUYER OR PROCUREMENT] Thinking about when employees at your company will begin to resume business travel, when do you expect to reach at least 50% of 2019's level of business travel?

<b>EUROPEAN BUYERS/PROCUREMENT</b>	<b>Domestic business travel</b>	<b>Regional business travel</b>	<b>Long-haul business travel</b>
<b>Already at 50%</b>	3%	0%	0%
<b>1-3 months</b>	16%	8%	1%
<b>4-6 months</b>	42%	34%	14%
<b>7-9 months</b>	18%	16%	15%
<b>10-12 months</b>	15%	27%	37%
<b>13-24 months</b>	2%	10%	26%
<b>24 months +</b>	0%	0%	1%
<b>Don't know</b>	4%	4%	5%





12. [DISPLAY IF Q1≠EUROPEAN COUNTRY AND Q2=BUYER OR PROCUREMENT]  
Thinking about when employees at your company will begin to resume business travel, when do you expect to reach at least 50% of 2019’s level of business travel?

<b>NON-EUROPEAN BUYERS/PROCUREMENT</b>	<b>Domestic business travel</b>	<b>International business travel</b>
<b>1-3 months</b>	8%	2%
<b>4-6 months</b>	34%	14%
<b>7-9 months</b>	16%	15%
<b>10-12 months</b>	23%	29%
<b>13-24 months</b>	11%	25%
<b>24 months +</b>	2%	5%
<b>Don’t know</b>	2%	11%

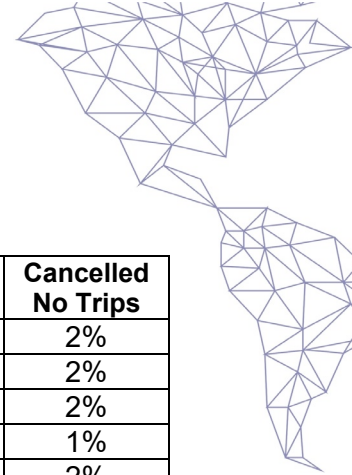
13. [DISPLAY IF Q2=BUYER OR PROCUREMENT] How willing would your company be to implement a policy that encourages employees download an app that would track and trace business travelers to assist in contact tracing efforts?

- Very willing: 19%
- Somewhat willing: 31%
- Neither willing nor unwilling: 11%
- Not willing: 10%
- Not willing at all: 5%
- Not sure: 24%

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





	<b>Cancelled All Trips</b>	<b>Cancelled Most Trips</b>	<b>Cancelled Some Trips</b>	<b>Cancelled a Few Trips</b>	<b>Cancelled No Trips</b>
China	72%	20%	5%	1%	2%
Hong Kong	74%	21%	3%	0%	2%
Taiwan	72%	21%	4%	1%	2%
Other APAC	68%	26%	3%	1%	1%
Europe	55%	34%	6%	3%	2%
United States	35%	44%	12%	6%	3%
Canada	56%	30%	7%	4%	3%
Latin America	60%	31%	4%	2%	2%
Middle East	66%	27%	3%	2%	2%
All International	53%	39%	5%	2%	1%
All Domestic Travel	22%	50%	16%	7%	5%
All Travel (Domestic and International)	24%	57%	14%	3%	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?

<b>Region/Country</b>	<b>Plan to Resume Travel in Near Future (1-3 months)</b>	<b>Considering Resuming Travel in Near future, but No Definite Plans</b>	<b>Do Not Plan to Resume Travel in Near Future</b>	<b>Not Sure</b>
<b>China</b>	4%	38%	42%	16%
<b>Hong Kong</b>	4%	40%	40%	16%
<b>Taiwan</b>	4%	39%	41%	16%
<b>Asia Pacific (minus China, Hong Kong and Taiwan)</b>	4%	41%	40%	15%
<b>Europe</b>	8%	47%	34%	12%
<b>Latin America</b>	6%	40%	42%	13%
<b>United States</b>	15%	50%	25%	9%
<b>Canada</b>	9%	50%	30%	11%
<b>Middle East</b>	5%	41%	38%	16%
<b>All International Travel</b>	6%	45%	37%	12%
<b>All Domestic Travel</b>	22%	53%	17%	8%
<b>All Travel</b>	10%	56%	23%	11%





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: 28%
- I feel the same as last month: 48%
- I am more pessimistic than I was last month: 24%

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: 15%
- Our bookings have remained the same: 48%
- Our bookings have decreased: 33%
- Not sure: 4%

