

2020 Coronavirus Poll December 17, 2020



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 43%
- Procurement/sourcing professional: 6%
- Supplier: 29%
- TMC: 11%
- Other: 12%

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

- Hotel chain: 26%
- Travel management company: 28%
- Ground transportation: 9%
- Individual hotel property: 9%
- Travel technology: 7%
- Airline: 10%
- Meetings management provider: 1%
- Payment company: 1%
- Other: 9%



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: 47%
 - Neither willing nor unwilling: 16%
 - Not willing: 17%
 - Not willing at all: 4%
 - Not sure: 10%

4. [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: 2%
 - The 2021 travel spend will be approximately the same as 2019: 5%
 - The 2021 travel spend will be lower than 2019: 90%
 - Don't know: 3%

5. [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 = 46.39%

6. [FILTERED FOR TRAVEL MANAGERS AND PROCUREMENT PROFESSIONALS]: In 2019 (before the Covid-19 pandemic) approximately what percent of your company's travel spend was allocated for each of these purposes?
 - Conferences, trade shows, and industry events: 17.9%
 - Internal company meetings with colleagues: 20.5%
 - Sales/account management meetings with current or prospective customers: 24.0%
 - Service trips (such as repairs, training or equipment installation) with current customers: 15.2%
 - Supplier meetings: 6.8%
 - Employee training and development: 9.4%
 - Other: 5.9%





7. [FILTERED FOR TRAVEL MANAGERS AND PROCUREMENT PROFESSIONALS]: Thinking about your company's 2021 travel spend, approximately what percent of likely be allocated to the following purposes? Answers must add to 100%, but your best estimate is fine. If you don't know, please skip this question.

- Conferences, trade shows, and industry events: 13.1%
- Internal company meetings with colleagues: 14.9%
- Sales/account management meetings with current or prospective customers: 30.3%
- Service trips (such as repairs, training or equipment installation) with current customers: 20.1%
- Supplier meetings: 5.6%
- Employee training and development: 8.3%
- Other: 7.5%

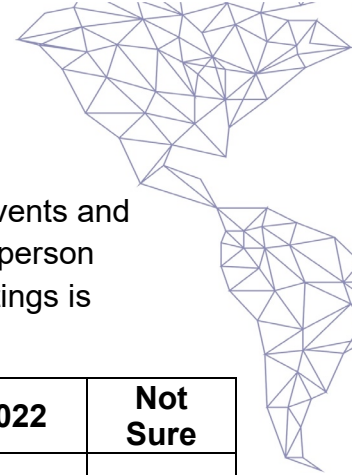
8. [FILTERED FOR TRAVEL MANAGERS AND PROCUREMENT PROFESSIONALS]: Has your company begun planning to host or attend meetings and/or events for 2021?

- Yes: 39%
- No: 52%
- Don't know: 9%

9. [DISPLAY IF Q8=YES; FILTERED FOR TRAVEL MANAGERS AND PROCUREMENT PROFESSIONALS] You mentioned your company is planning to host or attend meetings and/or events in 2021. Please select which of the following your company plans to host or attend.

- Small meetings or events with 50 or fewer attendees: 77%
- Mid-sized meetings or events with 51-500 attendees: 56%
- Large events or conferences with 500 or more attendees: 32%
- None of the above: 3%





10. Thinking about when GBTA members expect their employees to attend events and meetings (by meeting type), three in four expect employees will attend in-person meetings/events in Q2 or Q3 2021. In addition, attendance at hybrid meetings is expected to decline as 2021 unfolds.

	Q1 2021	Q2 2021	Q3 2021	Q4 2021	2022	Not Sure
In-person meetings or events with attendees outside your company	14%	34%	41%	5%	2%	3%
Internal company meetings or events held in-person	22%	38%	27%	4%	1%	8%
Hybrid meetings/events (in-person and remote attendees)	48%	27%	14%	2%	0%	9%

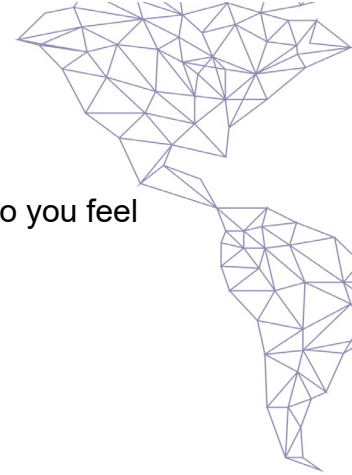
11. To what extent will the availability of vaccines factor into your company’s decision to resume business travel?

- A significant factor: 59%
- A moderate factor: 23%
- Not a factor: 4%
- Don’t know: 14%

12. [DISPLAY IF Q11=A SIGNIFICANT OR MODERATE FACTOR] Thinking about Covid-19 vaccines that are expected to become available in 2021, what best describes your company’s position on vaccines and the return to business travel?

- Employees will be permitted to travel for work when they have been vaccinated: 10%
- Employees will be permitted to travel for work when they and a significant portion of the population have been vaccinated: 20%
- Employees will be permitted to travel for work once a significant portion of the population has been vaccinated: 16%
- Don’t know: 54%





13. [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: 30%
- Neither optimistic nor pessimistic: 24%
- Pessimistic: 32%
- Very pessimistic: 8%
- Not sure: 4%

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	71%	21%	4%	2%	1%
Hong Kong	73%	22%	3%	1%	1%
Taiwan	72%	22%	4%	2%	0%
Other APAC	60%	31%	6%	2%	1%
Europe	49%	39%	7%	4%	1%
United States	31%	45%	13%	6%	5%
Canada	57%	30%	6%	3%	3%
Latin America	61%	27%	4%	3%	3%
Middle East	65%	25%	4%	3%	3%
All International	50%	39%	6%	4%	1%
All Domestic Travel	20%	51%	14%	9%	7%
All Travel (Domestic and International)	24%	58%	10%	6%	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	6%	41%	37%	16%
Hong Kong	6%	40%	38%	16%
Taiwan	5%	41%	35%	19%
Asia Pacific (minus China, Hong Kong and Taiwan)	5%	47%	32%	16%
Europe	12%	53%	24%	11%
Latin America	6%	47%	33%	14%
United States	19%	53%	20%	9%
Canada	13%	50%	25%	12%
Middle East	6%	43%	34%	17%
All International Travel	6%	54%	29%	11%
All Domestic Travel	24%	56%	13%	8%
All Travel	12%	59%	18%	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: 30%
- I feel the same as last month: 48%
- I am more pessimistic than I was last month: 22%

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: 12%
- Our bookings have remained the same: 41%
- Our bookings have decreased: 46%

