

2020 Coronavirus Poll October 22, 2020



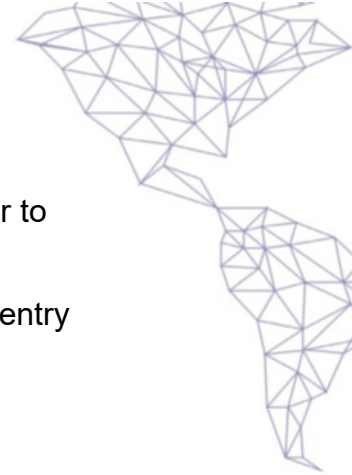
POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 41%
- Procurement/sourcing professional: 8%
- Supplier: 29%
- TMC: 12%
- Other: 10%

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

- Hotel chain: 25%
- Travel management company: 27%
- Ground transportation: 6%
- Individual hotel property: 12%
- Travel technology: 8%
- Airline: 8%
- Meetings management provider: 3%
- Payment company: 2%
- Other: 9%



3. 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): 43%
- Company policies restricting employees from traveling: 32%
- Employee unwillingness/reluctance to travel: 9%
- Travel budget freeze/ cost savings: 6%
- Other: 9%
- Unsure: 1%

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

	Yes	No	Don't Know
Reduced staff or laid off employees	59%	38%	3%
Furloughed employees	52%	45%	4%
Pay cuts for employees	48%	46%	6%

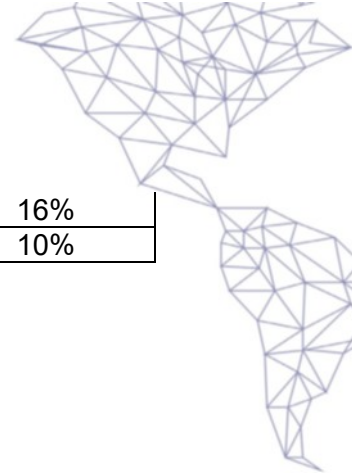
5. [DISPLAY IF Q4=YES FOR FURLOUGHS] You mentioned your company furloughed employees as a result of the coronavirus. Thinking about the employees who were affected, which of the following best describes their current status?

- All have returned to work: 5%
- Most have returned to work: 14%
- Some have returned to work: 46%
- All remain furloughed or have since been laid off: 34%

6. [DISPLAY IF SUPPLIER OR TMC] Thinking about the company you work for, how likely are the following scenarios in the next 12 months assuming your company does not receive adequate government support or assistance?

	Likely/Very likely	Neither likely nor unlikely	Not likely/Not likely at all	Not Sure
Reduce staff or lay off employees	62%	10%	19%	9%
Furlough employees	51%	13%	26%	10%
Enact pay cuts for employees	46%	15%	24%	15%
Close divisions or departments	40%	9%	40%	12%
Declare bankruptcy	7%	9%	73%	11%





Sell assets	23%	10%	52%	16%
Cease operations	9%	10%	70%	10%

7. The coronavirus has driven rapid growth of virtual meetings. In a normal environment (without a global pandemic), which of the following best describes your view?

- Face-to-face meetings are more effective/Much more effective: 82%
- Face-to-face and virtual meetings are equally effective: 14%
- Virtual meetings are more effective/Much more effective: 2%
- Unsure: 2%

8. When is the last time you flew on a commercial flight for ?

- Leisure/personal travel: March 2020 or earlier (74%), After March 2020 (26%)
- Business travel: March 2020 or earlier (94%), After March 2020 (6%)

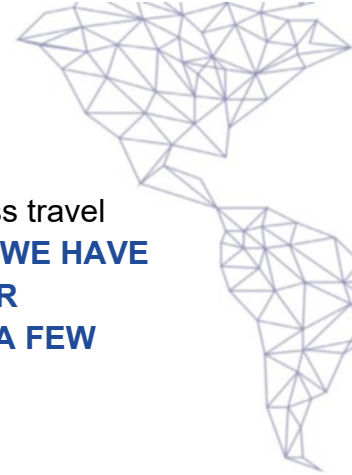
9. When do you expect to fly on a commercial flight for. . ?

	In 2020	In Q1 of 2021	In Q2 of 2021	After Q2 of 2021	Not Sure
Leisure/personal travel	34%	12%	10%	13%	32%
Business travel	10%	16%	9%	15%	50%

10. Thinking about international business travel specifically, which of the following public policies would you prefer?

- Travelers take a rapid-results coronavirus test immediately prior to departure and do not need to quarantine if they test negative: 76%
- Travelers face a mandatory period of quarantine upon arrival at their destination: 3%
- Prefer both equally: 13%
- Not sure: 8%





11. 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%	24%	3%	1%	2%
Hong Kong	73%	23%	3%	0%	1%
Taiwan	70%	24%	3%	2%	1%
Other APAC	66%	28%	3%	2%	1%
Europe	52%	37%	7%	2%	3%
United States	34%	44%	11%	5%	6%
Canada	57%	31%	5%	3%	3%
Latin America	65%	27%	4%	2%	2%
Middle East	62%	29%	5%	2%	2%
All International	51%	39%	5%	3%	2%
All Domestic Travel	23%	45%	16%	8%	8%
All Travel (Domestic and International)	25%	55%	13%	5%	3%



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

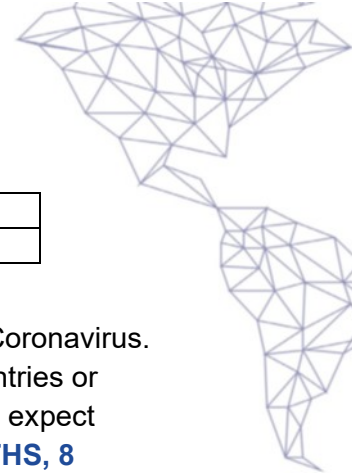
- We generally have the same or similar policies for all European countries: 61%
- Our policies vary depending on the country: 31%
- Other, please specify: 3%
- Unsure: 5%

13. [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	36%	52%	5%	5%	3%
United Kingdom	41%	46%	6%	6%	1%
France	49%	40%	8%	2%	1%
Spain	55%	38%	4%	2%	1%
Italy	45%	46%	6%	2%	1%
Netherlands	50%	41%	5%	3%	2%
Belgium	50%	42%	5%	2%	2%
Switzerland	46%	43%	8%	2%	1%
Austria	48%	43%	3%	3%	2%
Ireland	52%	44%	1%	3%	0%
Sweden	41%	53%	3%	0%	2%
Norway	45%	51%	5%	0%	0%
Finland	39%	52%	9%	0%	0%
Denmark	45%	48%	5%	1%	1%

14. [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	12%	42%	28%	14%	3%
United Kingdom	35%	35%	20%	8%	2%
France	37%	37%	19%	6%	1%
Spain	42%	35%	18%	4%	1%
Italy	19%	46%	27%	6%	2%
Netherlands	24%	36%	29%	8%	3%
Belgium	26%	39%	26%	7%	3%
Switzerland	15%	43%	28%	11%	4%
Austria	12%	40%	32%	11%	4%
Ireland	14%	40%	30%	13%	3%
Sweden	17%	41%	28%	10%	3%
Norway	11%	42%	32%	11%	4%



Finland	9%	41%	32%	14%	4%
Denmark	13%	42%	29%	13%	4%

15. 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]**

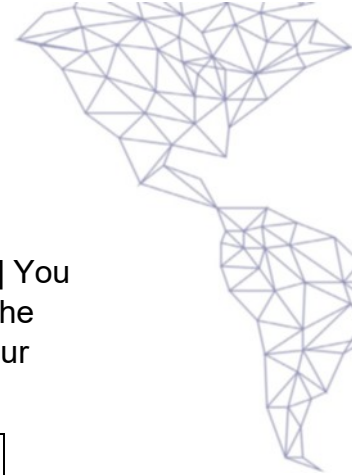
- a. Domestic travel [If Q3= cancelled or suspended at least a few domestic trips]
- b. International travel [If Q3= cancelled or suspended at least a few international trips]

	2 months	3 Months	6 Months	8 Months	12 Months	More than 12 months	Not sure
Domestic travel	15%	15%	32%	9%	7%	2%	19%
International travel	3%	6%	32%	14%	11%	8%	26%

16. 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	7%	37%	33%	23%
Hong Kong	7%	36%	34%	23%
Taiwan	5%	37%	34%	25%
Other APAC	6%	39%	32%	23%
Europe	13%	41%	24%	22%
United States	20%	43%	22%	16%
Canada	12%	42%	24%	22%
Latin America	7%	40%	31%	23%
Middle East	6%	37%	31%	25%
All International	7%	41%	30%	22%
All Domestic Travel	25%	44%	15%	15%
All Travel (Domestic and International)	12%	49%	20%	19%





17. 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	20%	43%	26%	11%
United Kingdom	13%	41%	33%	14%
France	9%	49%	29%	13%
Spain	10%	44%	31%	15%
Italy	14%	45%	29%	12%
Netherlands	13%	44%	30%	14%
Belgium	12%	42%	32%	14%
Switzerland	11%	43%	31%	15%
Austria	9%	44%	33%	14%
Ireland	13%	40%	31%	16%
Sweden	11%	46%	26%	17%
Norway	15%	38%	30%	16%
Finland	14%	39%	27%	20%
Denmark	14%	40%	31%	14%

18. [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: 16%
- I feel the same as last week: 57%
- I am more pessimistic than I was last week: 26%

19. [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: 231%
- Our bookings have remained the same: 44%
- bookings have decreased: 26%

