

2020 Coronavirus Poll April 8, 2020



POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 49%
- Procurement/sourcing professional: 8%
- Supplier: 27%
- TMC: 9%
- Other: 7%

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

- Hotel chain: 24%
- Travel management company: 23%
- Ground transportation: 13%
- Individual hotel property: 11%
- Travel technology: 10%
- Airline: 5%



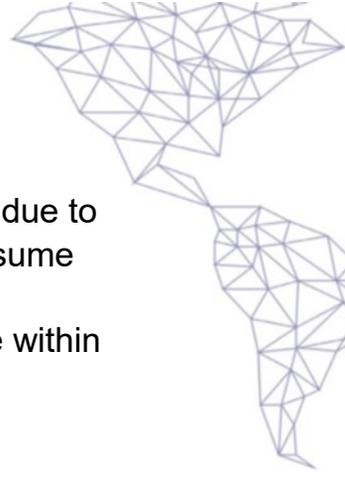
- Meetings management provider: 2%
- Payment company: 1%
- Other: 10%

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 Few Trips	Cancelled No Trips
China	92%	7%	0%	0%	0%
Hong Kong	89%	10%	0%	0%	1%
Taiwan	87%	11%	1%	0%	1%
Other APAC	83%	15%	1%	0%	1%
Europe	79%	18%	1%	1%	1%
United States	58%	35%	3%	2%	1%
Canada	68%	27%	2%	1%	2%
Latin America	77%	19%	2%	1%	1%
Middle East/Africa	82%	16%	1%	1%	1%
All International	76%	21%	1%	1%	1%
All Domestic Travel	50%	42%	4%	2%	2%





4. 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. . . SELECT ONE

- 2 months: 32%
- 3 months: 19%
- 6 months: 2%
- 8 months: 1%
- 12 months: 0%
- More than 12 months: 28%
- Unsure: 16%

5. How would you characterize the impact of the coronavirus on your company's revenue? [FILTERED BY SUPPLIERS]

- Significant: 96%
- Moderate: 3%
- Slight: 1%
- No impact at all: 0%

6. Thinking about the business trips that your company had booked for March and April 2020, approximately what percentage have been cancelled as a result of the coronavirus?

- 92% (Global Average)

7. 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?

- Most employees will be willing to travel: 33%
- Some employees will be willing to travel: 33%
- A few employees will be willing to travel: 9%
- Some employees will be unwilling to travel: 13%
- Most employees will be unwilling to travel: 2%
- Don't know: 2%





8. How often does your company host virtual meetings as a result of the coronavirus outbreak?

- Frequently: 83%
- Occasionally: 11%
- Rarely: 4%
- Never: 2%

11. Thinking about the impact coronavirus has taken on your company, what actions have been implemented?

- We have canceled or suspended all business trips: 55%
- We have canceled or suspended all non-essential trips, but still allow some essential travel: 41%
- We have canceled or suspended all business trips to particular regions or countries: 1%
- We have canceled or suspended business travel on a case-by-case basis, but we do not have a specific policy: 1%
- We generally have not canceled or suspended business trips: 0%
- Other _____ Please specify: 2%

12. What actions has your company taken to help protect your employees from the coronavirus? SELECT ALL THAT APPLY

- Instituted work from home policies: 86%
- Closed the office entirely: 42%
- Provide updated health and safety information: 76%
- Limit the number of people who work in the office: 49%
- Developed contingency policies to get work done such as increase teleconferences and video meetings: 74%
- Temporarily closed all but essential departments: 34%
- Move some employees to new locations: 13%
- Other, please specify _____: 5%
- None of the above: 1%





13. Do you think the coronavirus will change the way your company conducts business once there is no more threat from the disease? SELECT ONE

- Yes: 62%
- No: 16%
- Don't know: 22%

14. Has your company taken the following actions as a result of the coronavirus? - **Reduced staff or laid off employees** [Filtered for Suppliers and TMCs]

- Yes: 69%
- No: 27%
- Don't know: 4%

15. Has your company taken the following actions as a result of the coronavirus? - **Furloughed employees** [Filtered for Suppliers and TMCs]

- Yes: 66%
- No: 29%
- Don't know: 5%

16. Has your company taken the following actions as a result of the coronavirus? - **Pay cuts for employees** [Filtered for Suppliers and TMCs]

- Yes: 66%
- No: 25%
- Don't know: 9%

17. You mentioned your company has laid off or furloughed employees as a result of the coronavirus. Approximately what percentage has been affected? [DISPLAY IF Q14 AND/OR Q15 ="YES" FOR LAID OFF OR FURLOUGHED; FILTERED FOR SUPPLIERS AND TMCs]

- 64% - Global Average of Suppliers and TMCs

18. How long have you worked in the business travel industry?

- 5 years or less: 13%
- 6 - 10 years: 15%
- 11 - 15 years: 12%
- 16 - 20 years: 14%



- More than 20 years: 47%

19. Thinking about the impact of the coronavirus on the travel industry, how do you think it will compare to the following events? - September, 11, 2001 terrorist attacks on the United States [DISPLAY IF Q18=MORE THAN 20 YEARS OF EXPERIENCE]

- The financial impact of the coronavirus will be more severe: 95%
- The financial impact will be equally severe: 4%
- The financial impact of the coronavirus will be less severe: 1%

20. Thinking about the impact of the coronavirus on the travel industry, how do you think it will compare to the following events? - 2003 SARS outbreak [DISPLAY IF Q18=AT LEAST 15 YEARS OF EXPERIENCE]

- The financial impact of the coronavirus will be more severe: 93%
- The financial impact will be equally severe: 2%
- The financial impact of the coronavirus will be less severe: 5%

21. Thinking about the impact of the coronavirus on the travel industry, how do you think it will compare to the following events? - 2008-2009 financial crisis/great recession [DISPLAY IF Q18=AT LEAST 11 YEARS OF EXPERIENCE]

- The financial impact of the coronavirus will be more severe: 85%
- The financial impact will be equally severe: 11%
- The financial impact of the coronavirus will be less severe: 4%

22. Thinking about the impact of the coronavirus on the travel industry, how do you think it will compare to the following events? - European sovereign debt crisis [DISPLAY IF Q18=AT LEAST 6 YEARS OF EXPERIENCE]

- The financial impact of the coronavirus will be more severe: 84%
- The financial impact will be equally severe: 11%
- The financial impact of the coronavirus will be less severe: 5%