

## 2020 Coronavirus Poll July 16, 2020



## POLL RESULTS

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### 1. Which of the following best describes you?

- Travel manager / buyer: 36%
- Procurement/sourcing professional: 7%
- Supplier: 31%
- TMC: 12%
- Other: 13%

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

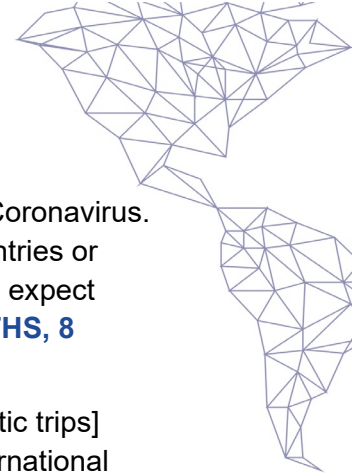
- Hotel chain: 30%
- Travel management company: 27%
- Ground transportation: 8%
- Individual hotel property: 11%
- Travel technology: 6%
- Airline: 7%
- Meetings management provider: 2%
- Payment company: 1%
- Other: 9%



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	80%	17%	2%	1%	1%
Hong Kong	80%	18%	2%	0%	1%
Taiwan	79%	18%	2%	1%	1%
Other APAC	74%	21%	3%	1%	1%
Europe	67%	25%	4%	2%	1%
United States	44%	39%	9%	5%	3%
Canada	60%	28%	6%	3%	3%
Latin America	72%	23%	3%	1%	1%
Middle East	75%	21%	2%	1%	1%
All International	65%	30%	3%	1%	1%
All Domestic Travel	32%	45%	11%	7%	5%
All Travel (Domestic and International)	36%	49%	9%	4%	1%





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. . . **[MATRIX: 2 MONTHS, 3 MONTHS, 6 MONTHS, 8 MONTHS, 12 MONTHS, MORE THAN 12 MONTHS, NOT SURE]**

- 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	23%	21%	27%	7%	6%	2%	15%
International travel	6%	10%	29%	11%	12%	7%	25%

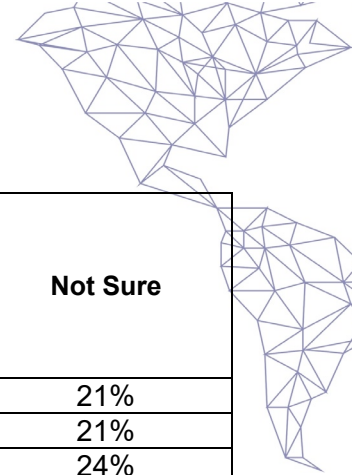
5. Thinking about your expectations during the early months of the pandemic (e.g., March 2020), would you say that. . .

Business travel has resumed more quickly than I had expected	Business travel has resumed about as quickly as I had expected	Business travel has resumed more slowly than I had expected
7%	28%	65%

6. 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]**

- 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





	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	10%	32%	38%	21%
Hong Kong	9%	32%	37%	21%
Taiwan	10%	31%	35%	24%
Other APAC	11%	36%	33%	20%
Europe	17%	42%	23%	18%
United States	24%	41%	21%	14%
Canada	22%	39%	22%	17%
Latin America	8%	37%	35%	21%
Middle East	11%	34%	34%	21%
All International	10%	43%	29%	18%
All Domestic Travel	34%	40%	12%	13%
All Travel (Domestic and International)	14%	49%	18%	19%

7. [DISPLAY IF Q1 = **United States** AND Q4=CANCELED OR SUSPENDED MOST OR ALL DOMESTIC TRAVEL] You mentioned your company has limited most or all domestic travel within the U.S. When your company decides to resume travel, which will most likely be your approach?

- We will resume travel in some states or regions while continuing to limit travel in other states or regions: 36%
- We will wait until we feel comfortable resuming travel anywhere in the country: 44%
- Other: 9%
- Not sure: 11%

8. [DISPLAY IF Q1 ≠ US AND Q4=CANCELED OR SUSPENDED MOST OR ALL DOMESTIC TRAVEL] You mentioned your company has limited most or all domestic travel within your country. When your company decides to resume travel, which will most likely be your approach?

- We will resume travel in some areas or regions of the country, while continuing to limit travel in other states or regions: 40%
- We will wait until we feel comfortable resuming travel anywhere in the country: 45%
- Other: 8%
- Not sure: 6%





9. [If buyer or procurement] 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? Please select one.

- Most employees will be willing to travel: 15%
- Some employees will be willing to travel: 47%
- A few employees will be willing to travel: 26%
- Most employees will be unwilling to travel: 2%
- Don't know: 9%

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

- We have canceled or suspended all business trips: 42%
- We have canceled or suspended all non-essential trips, but still allow some essential travel: 46%
- We have canceled or suspended all business trips to particular regions or countries: 2%
- We have canceled or suspended business travel on a case-by-case basis, but we do not have a specific policy: 5%
- We generally have not canceled or suspended business trips: 1%
- Other \_\_\_\_\_ Please specify: 3%

11. [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: 8%
- I feel the same as last week: 47%
- I am more pessimistic than I was last week: 44%

12. [DISPLAY IF Q2=BUYER OR PROCUREMENT] Has your company revised its travel policy as a result of the coronavirus pandemic?

- Yes: 56%
- No: 44%

13. [DISPLAY IF Q12=YES] You mentioned your company has revised its travel policy as a result of the pandemic. Thinking about your travel policy today, how much has it changed since January 2020?

- It has changed a lot: 27%
- It has changed somewhat: 44%
- It has changed a little: 26%





- It has barely changed at all: 3%

14. [DISPLAY IF Q2=BUYER OR PROCUREMENT] Thinking about your company’s travel program, which of the following changes has it made as a result of the pandemic? Please select all that apply.

- New rules about pre-trip approval: 53%
- More frequent or detailed pre-trip communications or briefings: 35%
- Collecting health information from employee travelers (i.e., virus exposure or preexisting conditions): 24%
- Clarifying or changing rules about ticket credits/unused tickets: 22%
- New rules about booking channels (i.e., requiring travelers to use a TMC or corporate online booking tool: 20%
- New rules about ground transportation (i.e., allowing rental cars more frequently): 20%
- New rules about preferred suppliers (i.e., requiring travelers to use preferred airlines that allow name change waivers): 17%
- New rules about flight bookings (i.e., allowing upgrades, seat selection, or lounge passes): 15%
- Requiring travelers to sign a waiver before traveling: 11%
- Greater adoption of trip insurance/assistance: 10%
- Signing a new contract with a travel risk management firm: 5%
- Other (please specify): 8%
- None of the above: 24%

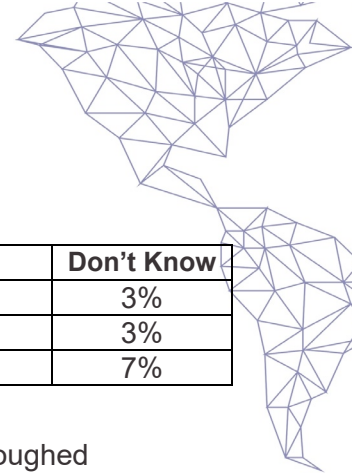
15. [DISPLAY IF Q3=AIRLINE, HOTEL CHAIN, HOTEL PROPERTY, TMC, OR GROUND] You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past week?

- Our bookings have increased: 29%
- Our bookings have remained the same: 37%
- bookings have decreased: 35%

16. When thinking about the following, which best describes your view?

	The worst has already happened	The worst has yet to come	Not sure
Layoffs/furloughs in the corporate travel industry	36%	44%	20%
Cancelled flights	73%	12%	15%
Hotels suspending operations	66%	19%	15%
Revenue loss for travel companies	35%	44%	21%





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

	Yes	No	Don't Know
Reduced staff or laid off employees	52%	44%	3%
Furloughed employees	51%	46%	3%
Pay cuts for employees	47%	47%	7%

18. [DISPLAY IF Q17=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: 4%
- Most have returned to work: 10%
- Some have returned to work: 42%
- All remain furloughed or have since been laid off: 44%

19. Do you feel you have enough information about supplier efforts in the following areas?

	I have enough information already	I have some information but would like more	I do not have enough information	Not important
Supplier cleaning and sanitation practices	68%	24%	8%	1%
Information about operational changes such as flight rescheduling or check-in procedures	49%	37%	13%	1%
Safety procedures at airports	46%	38%	15%	1%
Supplier cancellation or change policies/waivers	46%	38%	15%	1%
Vendor staff training on best practices to ensure traveler safety	47%	38%	15%	2%
Third-party inspection/verification of supplier sanitation practices	36%	35%	24%	5%

