

2021 Coronavirus Poll July 19, 2021



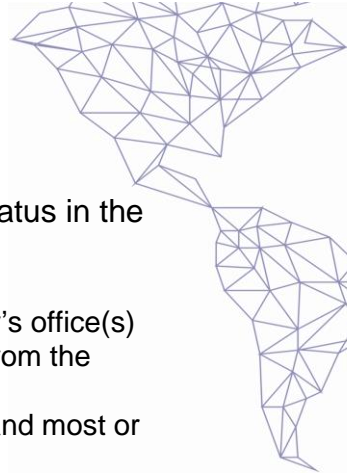
POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 47%
- Procurement/sourcing professional: 6%
- Supplier: 30%
- TMC: 9%
- Other: 8%

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

- Hotel chain: 28%
- Travel management company: 23%
- Ground transportation: 7%
- Individual hotel property: 6%
- Travel technology: 9%
- Airline: 13%
- Meetings management provider: 2%
- Payment company: 3%
- Other: 9%



3. Which of the following best describes your company’s office re-opening status in the country where you are based?

- Our office(s) has re-opened but working in the office is optional: My company’s office(s) has re-opened and most or all employees currently have the option to work from the office or work from home: 45%
- Our office has not yet reopened: My company’s office(s) has not re-opened and most or all employees are expected to work from home: 27%
- Our office(s) has re-opened and most employees are required to be in the office: My company’s office(s) has re-opened and most or all employees are required to work from the office at least one day per week: 19%
- Other: 9%

4. When your company fully re-opens its office(s) in the country where you are based, which of the following will most likely apply?

- Full-time in-office: Most employees will commute to the office most days: 18%
- Full-time remote: Most employees will work from home most days: 9%
- Part-time in-office/part-time remote: Most employees will work from the office some days and work from home other days: 52%
- Flex time (employee choice): 13%
- Other (please specify): 6%
- Not sure: 3%

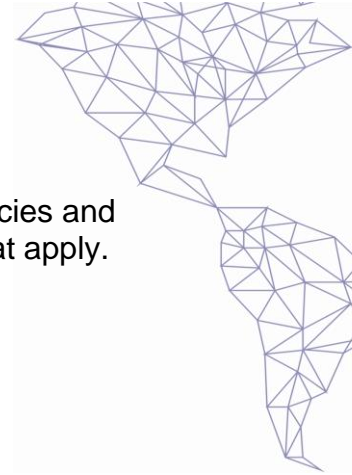
5. Does (or will) your company require employees to receive a COVID-19 vaccine before they can do the following in the future?

| Require vaccine before employees can do the following: | Yes | No | Don’t Know |
|---|------------|-----------|-------------------|
| Work from company offices/job sites | 13% | 63% | 24% |
| Travel for business | 18% | 55% | 27% |
| Meet with clients and customers face-to-face | 16% | 55% | 29% |

6. Are you vaccinated against COVID-19?

- Yes, fully vaccinated: 81%
- Yes, partially vaccinated: 8%
- No: 5%
- Prefer not to share: 5%





7. How does the lack of international business travel due to government policies and restrictions impact your company to do the following? Please select all that apply.

- Networking: 52%
- Business prospecting: 51%
- Business planning and strategizing: 50%
- Conduct sales meetings: 48%
- Account management: 38%
- Train or develop employee skillsets: 28%
- Recruiting: 15%
- Other: 10%
- None of the above: 17%

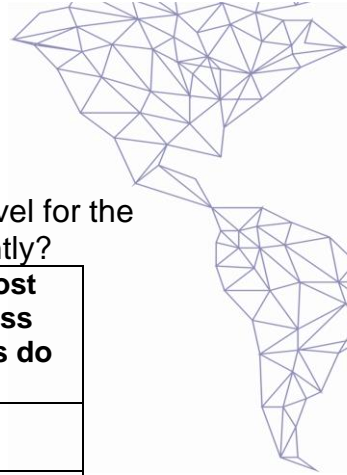
8. Which of the following best describes your company’s current position on employees traveling for business?

| | Usually allowed | Sometimes allowed | Rarely allowed | Not allowed |
|--|-----------------|-------------------|----------------|-------------|
| Non-essential domestic business trips | 33% | 24% | 20% | 23% |
| Non-essential international business trips | 10% | 16% | 23% | 52% |

9. In the current environment, are employees at your company allowed to take non-essential domestic business trips for the following reasons?

| | Usually allowed | Sometimes allowed | Rarely allowed | Not allowed |
|---|-----------------|-------------------|----------------|-------------|
| Sales/account management trips | 43% | 29% | 14% | 13% |
| Service trips | 47% | 24% | 12% | 17% |
| Internal collaboration | 29% | 26% | 20% | 25% |
| Attending a small meeting, event, or conference (50 attendees or fewer) | 29% | 27% | 21% | 23% |
| Attending a medium-sized meeting, event, or conference (51-500 attendees) | 29% | 21% | 18% | 31% |
| Attending a large meeting, event, or conference (more than 500 attendees) | 27% | 19% | 17% | 37% |





10. To the best of your knowledge, do the business travelers who typically travel for the following reasons at your company want to travel for these reasons currently?

| Willingness to travel by reason for travel | Yes - most business travelers do | Some do and some do not | No - most business travelers do not |
|---|----------------------------------|-------------------------|-------------------------------------|
| Sales/account management trips | 59% | 36% | 5% |
| Service trips | 56% | 38% | 6% |
| Internal collaboration | 40% | 49% | 11% |
| Attending a small meeting, event, or conference (50 attendees or fewer) | 38% | 50% | 11% |
| Attending a medium-sized meeting, event, or conference (51-500 attendees) | 33% | 49% | 18% |
| Attending a large meeting, event, or conference (more than 500 attendees) | 32% | 44% | 24% |

11. Thinking about your travel program, how important are the following priorities currently?

| | More important than before the pandemic | Equally important as before the pandemic | Less important than before the pandemic |
|---|---|--|---|
| Cost savings | 22% | 67% | 11% |
| Sustainability / corporate social responsibility | 39% | 57% | 3% |
| Risk management / duty of care | 69% | 31% | 1% |
| Program compliance (e.g., online booking tool adoption) | 34% | 59% | 7% |
| Traveler satisfaction | 27% | 72% | 1% |

12. [DISPLAY IF Q2=BUYER/PROCUREMENT] How did your company's travel spend change in June 2021, compared to the prior month?

- Increased a lot: 17%
- Increased somewhat: 55%
- Remained the same: 20%
- Decreased somewhat: 2%
- Decreased a lot: 4%
- Not sure: 1%



13. You mentioned your company's travel spend increased in June 2021, compared to May. Approximately by what percentage did it increase? Your best estimate is fine.

- Mean = 41.83%

14. You mentioned your company's travel spend decreased in June 2021, compared to May. Approximately by what percentage did it decrease? Your best estimate is fine.

- Mean = 59.27%

15. Thinking about your organization, how often do employees (including senior-level executives) use private jets or charter planes when traveling on business currently?

- They use them more frequently on business trips than before the pandemic: 10%
- They use them equally frequently on business trips as before the pandemic: 53%
- They use them less frequently on business trips than before the pandemic: 37%

16. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 24%
- Somewhat willing: 53%
- Neither willing nor unwilling: 12%
- Not willing: 3%
- Not willing at all: 1%
- Not sure: 7%

17. [DISPLAY IF Q1=SUPPLIER/TMC] In the current environment, how do you feel about the financial prospects of companies in the business travel

- Very optimistic: 13%
- Optimistic: 44%
- Neither optimistic nor pessimistic: 24%
- Pessimistic: 13%
- Very pessimistic: 3%
- Not sure: 3%



18. 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]**

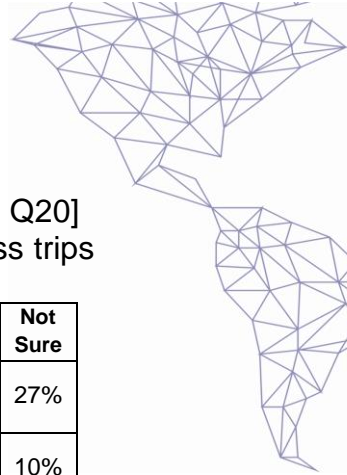
- a. All international travel
- b. All Domestic travel
- c. All travel, domestic and international

| | Cancelled All Trips | Cancelled Most Trips | Cancelled Some Trips | Cancelled a Few Trips | Cancelled No Trips |
|--|---------------------|----------------------|----------------------|-----------------------|--------------------|
| All International | 43% | 43% | 8% | 4% | 2% |
| All Domestic Travel | 12% | 38% | 23% | 14% | 13% |
| All Travel (Domestic and International) | 13% | 47% | 27% | 9% | 5% |

19. 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 |
|--------------------------|---|---|---|----------|
| All International Travel | 27% | 54% | 13% | 5% |
| All Domestic Travel | 63% | 31% | 4% | 2% |
| All Travel | 38% | 49% | 7% | 6% |





20. [CARRY FORWARD IF CANCELED OR SUSPENDED MOST OR ALL IN Q20]
When does your company expect to resume the following types of business trips specifically?

| | Not yet decided | Already resumed | July 2021 | Aug 2021 | Sept 2021 | Oct 2021 | Nov 2021 | Dec 2021 | 2022 | Not Sure |
|--|-----------------|-----------------|-----------|----------|-----------|----------|----------|----------|------|----------|
| All international travel | 22% | 8% | 1% | 2% | 10% | 5% | 3% | 1% | 20% | 27% |
| All domestic travel within your country | 8% | 40% | 4% | 6% | 14% | 7% | 2% | 1% | 9% | 10% |
| All travel, including domestic and international | 16% | 12% | 1% | 3% | 11% | 7% | 4% | 1% | 17% | 29% |

21. [DISPLAY IF Q1=SUPPLIER/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 month: 54%
- I feel the same as last month: 40%
- I am more pessimistic than I was last month: 6%

22. [DISPLAY IF AIRLINE, HOTEL, TMC, OR GROUND TRANSPORTATION] 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: 70%
- Our bookings have remained the same: 27%
- Our bookings have decreased: 3%

