

## 2021 Coronavirus Poll August 26, 2021



## POLL RESULTS

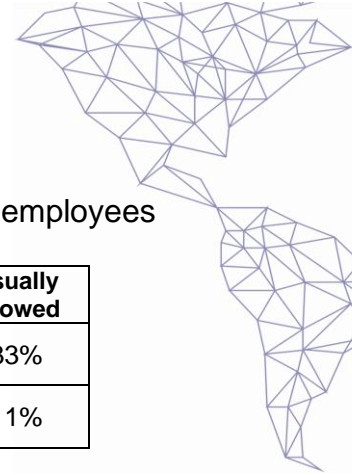
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### 1. Which of the following best describes you?

- Travel manager / buyer: 47%
- Procurement/sourcing professional: 10%
- Supplier: 28%
- TMC: 8%
- Other: 7%

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

- Hotel chain: 33%
- Travel management company: 22%
- Ground transportation: 5%
- Individual hotel property: 8%
- Travel technology: 7%
- Airline: 12%
- Meetings management provider: 1%
- Payment company: 3%
- Other: 9%



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

|   | Not allowed | Rarely allowed | Sometimes allowed | Usually allowed |
|---|-------------|----------------|-------------------|-----------------|
| <b>Non-essential domestic business trips</b>      | 23%         | 17%            | 27%               | 33%             |
| <b>Non-essential international business trips</b> | 49%         | 23%            | 17%               | 11%             |

4. Thinking back 30 days ago, which of the following best described your company’s position on employees traveling for business at that point in time?

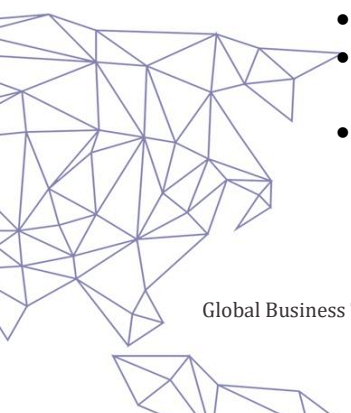
|   | Not allowed | Rarely allowed | Sometimes allowed | Usually allowed |
|---|-------------|----------------|-------------------|-----------------|
| <b>Non-essential domestic business trips</b>      | 28%         | 21%            | 26%               | 25%             |
| <b>Non-essential international business trips</b> | 54%         | 22%            | 16%               | 8%              |

5. Please rate your concern about the impact of the Delta variant / new variants and the growing number of coronavirus cases in many countries when it comes to...

|  | Not concerned at all | Not concerned | Neither concerned nor unconcerned | Concerned | Very concerned |
|--|----------------------|---------------|-----------------------------------|-----------|----------------|
| <b>The safety of business travel</b>                             | 4%                   | 7%            | 10%                               | 50%       | 28%            |
| <b>Revenue impact to companies in the business travel sector</b> | 1%                   | 3%            | 11%                               | 49%       | 36%            |
| <b>Employment and (re)hiring in the business travel sector</b>   | 3%                   | 5%            | 14%                               | 48%       | 31%            |

6. [DISPLAY IF BUYER/PROCUREMENT] Due to the impact of the Delta variant / other variants and its rapid spread around the globe, has your company postponed or canceled employee business travel to attend the following types of meetings or events? (% report canceling or suspending business travel due to the Delta /other variants)

- **Large in-person meeting, event, or conference** (more than 500 attendees): 78%
- **Medium-sized in person meeting, event, or conference** (51-500 attendees): 76%
- **Internal collaboration** (i.e., traveling to work at another company office or site; traveling to work with coworkers at another location): 71%
- **Small meeting, event, or conference** (50 attendees or fewer): 68%
- **Sales/account management trips** (i.e., traveling to visit a client, customer, or sales prospect): 41%
- **Service trips** (e.g., consultants traveling to visit clients; blue collar employees traveling to work on a job site): 35%





7. Does your company have procedures in place for contact tracing should an employee become infected with Covid-19 or the Delta variant / other variants?

- Yes: 79%
- No: 29%

8. [DISPLAY IF BUYER/PROCUREMENT] In the past month, has your company introduced new restrictions on non-essential business travel specifically as a result of the Delta variant (or other variants) and/or the growing number of coronavirus cases in many countries?

- Yes - we have introduced new restrictions: 21%
- No - but we are considering introducing new restrictions: 25%
- No - we are unlikely to introduce new restrictions: 49%
- Not sure: 5%

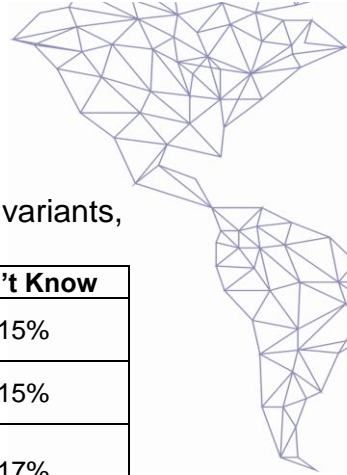
9. [DISPLAY IF BUYER/PROCUREMENT AND Q3=NEVER OR RARELY ALLOWED FOR BOTH] Thinking about the Delta variant / other variants and the growing number of coronavirus cases in many countries, please rate the likelihood that these will delay your company’s plans to resume non-essential business travel.

|  | Not likely at all | Not likely | Neither likely nor unlikely | Likely | Very likely |
|--|-------------------|------------|-----------------------------|--------|-------------|
| <b>Non-essential domestic business travel</b>      | 3%                | 8%         | 9%                          | 37%    | 44%         |
| <b>Non-essential international business travel</b> | 4%                | 7%         | 10%                         | 35%    | 44%         |

10. Has your company altered its plans for the following due to the spread of the Delta variant and/or other variants?

|   | Yes | No  | Don't Know |
|---|-----|-----|------------|
| <b>Office reopening</b>                                     | 38% | 54% | 7%         |
| <b>Domestic business travel</b>                             | 28% | 66% | 6%         |
| <b>International business travel</b>                        | 36% | 55% | 9%         |
| <b>All business travel, both domestic and international</b> | 32% | 60% | 8%         |





11. Due to the rising cases of people infected with the Delta variant and other variants, has your company changed its mind concerning:

|  | Yes | No  | Don't Know |
|--|-----|-----|------------|
| Requiring employees to be vaccinated before returning to the office  | 18% | 67% | 15%        |
| Requiring employees to be vaccinated in order to travel for business domestically                                | 19% | 66% | 15%        |
| Requiring employees to be vaccinated in order to travel for business internationally                             | 19% | 63% | 17%        |
| Requiring employees to be vaccinated in order to travel for all business travel, both domestic and international | 18% | 66% | 16%        |

12. [DISPLAY IF SUPPLIER/TMC] You indicated you work for a travel supplier or TMC. To what extent do you believe the Delta variant/other variants and the growing number of coronavirus cases in many countries will impact your revenue from business travelers and corporate travel customers?

- It will have a very negative impact: 44%
- It will have a moderately negative impact: 37%
- It will have a slightly negative impact: 13%
- It will not have an impact at all: 2%
- Not sure: 4%

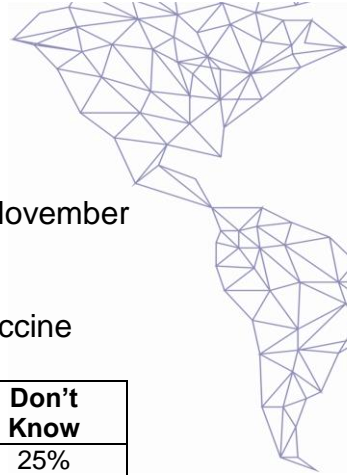
13. [DISPLAY IF SUPPLIER/TMC] You indicated you work for a travel supplier or TMC. Thinking about the company you work for, to what extent has your company changed its operations or safety protocols specifically as a result of the Delta variant/other variants and the growing number of coronavirus cases in many countries? Examples include re-introducing mask requirements, changing capacity limits, or closing public spaces such as airport lounges or hotel restaurants.

- We have already changed our operations/safety protocols: 49%
- We are likely to change our operations/safety protocols: 24%
- We are unlikely to change our operations/safety protocols: 27%

14. Thinking ahead to the September-November timeframe this year, which of the following best describes your view?

- Business travel will see a significant increase in September - November (compared to the June- August timeframe): 8%
- Business travel will see a moderate increase in September - November (compared to the June- August timeframe): 47%
- Business travel will remain flat in September - November (compared to the June- August timeframe): 31%
- Business travel will see a moderate decrease in September - November (compared to the June- August timeframe): 9%





- Business travel will see a significant decrease in September - November (compared to the June- August timeframe): 5%

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

|  | Yes | No  | Don't Know |
|--|-----|-----|------------|
| <b>Work from company offices/job sites</b>                                     | 20% | 55% | 25%        |
| <b>Travel for business domestically</b>  | 21% | 56% | 23%        |
| <b>Travel for business internationally</b>                                     | 25% | 51% | 24%        |
| <b>Meet with clients and customers face-to-face</b>                            | 22% | 53% | 25%        |
| <b>Attend large (more than 500 attendees) meetings, conferences, or events</b> | 22% | 49% | 29%        |

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

- Increased a lot: 10%
- Increased somewhat: 46%
- Remained the same: 28%
- Decreased somewhat: 5%
- Decreased a lot: 9%
- Not sure: 2%

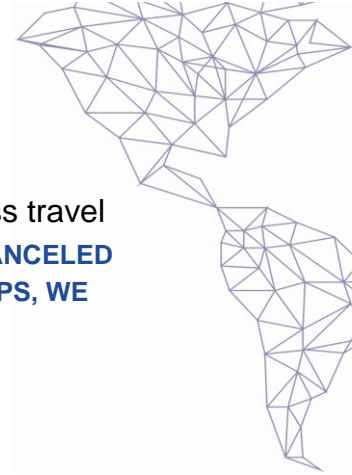
17. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 16%
- Somewhat willing: 56%
- Neither willing nor unwilling: 11%
- Not willing: 8%
- Not willing at all: 2%
- Not sure: 7%

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

- Very optimistic: 3%
- Optimistic: 32%
- Neither optimistic nor pessimistic: 38%
- Pessimistic: 22%
- Very pessimistic: 4%
- Not sure: 1%





19. 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]

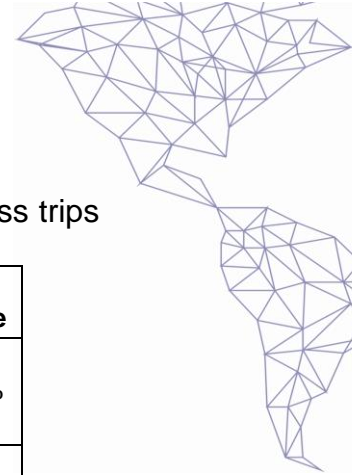
- a. All international travel
- b. All Domestic travel
- c. All travel, domestic and international

|  | Cancelled All Trips | Cancelled Most Trips | Cancelled Some Trips | Cancelled a Few Trips | Cancelled No Trips |
|--|---------------------|----------------------|----------------------|-----------------------|--------------------|
| <b>All International</b>                       | 34%                 | 44%                  | 11%                  | 5%                    | 6%                 |
| <b>All Domestic Travel</b>                     | 10%                 | 31%                  | 23%                  | 14%                   | 22%                |
| <b>All Travel (Domestic and International)</b> | 12%                 | 38%                  | 27%                  | 14%                   | 8%                 |

20. 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 | 18%   | 51%   | 22%   | 9%       |
| All Domestic Travel      | 40%   | 41%   | 12%   | 6%       |
| All Travel               | 26%   | 49%   | 13%   | 11%      |





21. When does your company expect to resume the following types of business trips specifically?

|  | Not yet decided | Already resumed | Aug 2021 | Sept 2021 | Oct 2021 | Nov 2021 | Dec 2021 | 2022 | Not Sure |
|--|-----------------|-----------------|----------|-----------|----------|----------|----------|------|----------|
| All international travel                         | 19%             | 9%              | 1%       | 4%        | 5%       | 3%       | 1%       | 22%  | 35%      |
| All domestic travel within your country          | 8%              | 39%             | 3%       | 8%        | 5%       | 3%       | 1%       | 13%  | 20%      |
| All travel, including domestic and international | 14%             | 16%             | 2%       | 4%        | 4%       | 3%       | 1%       | 21%  | 35%      |

22. [DISPLAY IF 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: 15%
- I feel the same as last month: 46%
- I am more pessimistic than I was last month: 39%

23. [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: 24%
- Our bookings have remained the same: 46%
- Our bookings have decreased: 31%

