

2021 Coronavirus Poll February 18, 2021



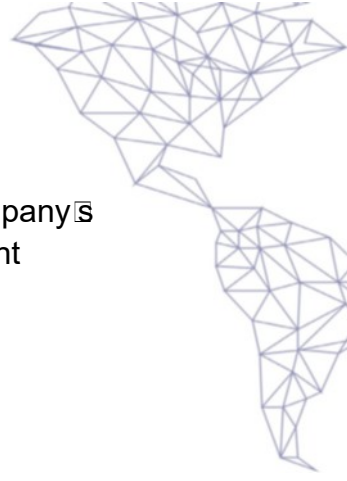
POLL RESULTS

1. Which of the following best describes you?

- Travel manager / buyer: 43%
- Procurement/sourcing professional: 7%
- Supplier: 28%
- TMC: 11%
- Other: 11%

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

- Hotel chain: 28%
- Travel management company: 28%
- Ground transportation: 5%
- Individual hotel property: 8%
- Travel technology: 8%
- Airline: 10%
- Meetings management provider: 2%
- Payment company: 2%
- Other: 8%



3. [DISPLAY IF Q2=BUYER OR PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment?

- Very willing: 6%
- Somewhat willing: 43%
- Neither willing nor unwilling: 19%
- Not willing: 20%
- Not willing at all: 4%
- Not sure: 9%

4. Some companies are considering mandating Covid-19 testing before employees can travel for work. Thinking about companies mandating testing for their employees, what statement is closest to your opinion on the topic of mandated testing?

- It is a good policy: 49%
- I am indifferent to the policy: 20%
- It is a bad policy: 15%
- Not sure: 16%

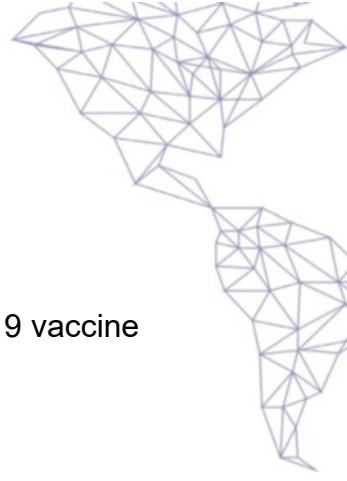
5. [DISPLAY IF Q4=GOOD POLICY] You mentioned you think mandated testing for employees before they can travel for work is a good policy. Why do you think this is a good policy? Please select up to three (3) reasons.

- Our customers and clients will feel safe with having face-to-face meetings if they know our employee has tested negative: 69%
- It will help resume business travel: 64%
- It helps monitor employee safety and wellness: 58%
- It will help employees safely return to the office if they have tested negative: 32%
- It protects employees from infection: 31%
- It reduces legal liability: 14%
- Other: 3%

6. [DISPLAY IF Q4=BAD POLICY] You mentioned you think mandated testing for employees before they can travel for work is a bad policy. Why do you think this is a bad policy? Please select up to three (3) reasons.

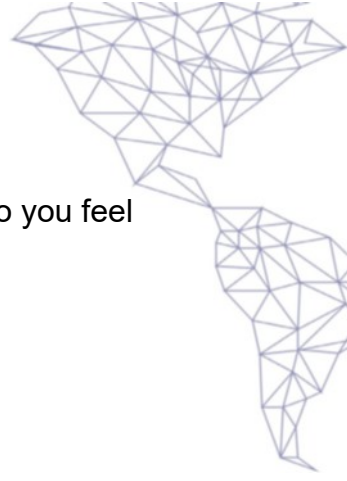
- It is ineffective as employees can test negative one: 76%
- We do not have the legal authority to require employees: 59%
- Privacy concerns: 51%
- It is difficult to mandate testing of employees: 32%
- It is time consuming: 14%





- It is expensive: 13%
 - Other: 13%
7. Some companies have considered asking employees to receive a Covid-19 vaccine before they can travel for business. Do you think this is ?
- It is a good policy: 47%
 - I am indifferent to the policy: 15%
 - It is a bad policy: 22%
 - Not sure: 16%
8. [DISPLAY IF Q7=GOOD POLICY] You mentioned you think asking employees to take the vaccine before they can travel for work is a good policy. Why do you think this is a good policy? Please select up to three reasons.
- It will help resume business travel: 65%
 - Our customers and clients will feel safe with having face-to-face meetings if they know our employee has tested negative: 61%
 - It protects employees from infection: 57%
 - It helps monitor employee safety and wellness: 41%
 - It will help employees safely return to the office if they have tested negative: 40%
 - It reduces legal liability: 15%
 - Other: 3%
9. [DISPLAY IF Q7=BAD POLICY] You mentioned you think asking employees to take the vaccine before they can travel for work is a bad policy. Why do you think this is a bad policy? Please select up to three (3) reasons.
- We do not have the legal authority to require employees to be vaccinated: 78%
 - Privacy concerns: 49%
 - It is difficult to mandate employees be vaccinated: 48%
 - Vaccine is not widely available: 45%
 - It is time consuming to collect this information: 3%
 - It is expensive: 2%
 - Other: 23%
 - Not sure: 1%





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

- Very optimistic: 3%
- Optimistic: 30%
- Neither optimistic nor pessimistic: 20%
- Pessimistic: 36%
- Very pessimistic: 8%
- Not sure: 3%

11. Several governments around the globe have instituted border restrictions and or closures to slow the spread of coronavirus. How has border restrictions and or closures impacted business travel for your company?

- Reduced business travel at my company: 68%
- Increased confusion and uncertainties about when business travel can resume: 56%
- Impacted my company's recovery efforts in 2021: 43%
- No impact on my company: 10%
- Restricted imports/exports of goods and services my company needs: 10%
- Employees at my company have been stuck in a country/region and cannot return home: 8%
- Other: 4%

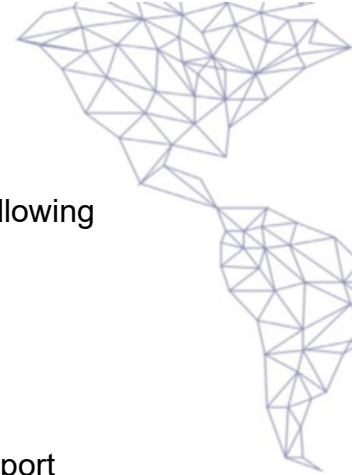
12. Have you personally received at least one dose of the Covid-19 vaccination?

- Yes: 7%
- No: 92%
- Not sure: 1%

13. Assuming you receive a Covid-19 vaccine in the next couple months, how do you think you will feel about traveling for business in 2021?

- I will feel very comfortable about traveling for business after receiving the vaccine: 39%
- I will feel somewhat comfortable about traveling for business after receiving the vaccine: 39%
- Neither comfortable nor uncomfortable: 14%
- I will not feel comfortable traveling for business even after receiving the vaccine: 5%
- I will not feel comfortable at all traveling for business even after receiving the vaccine: 2%





14. Do you support requiring employees take a pre-test for Covid-19 before allowing them to travel domestically for work?

- Yes: 52%
- No: 33%
- Not sure: 16%

15. Once vaccines become widely available throughout the world, do you support airlines requiring passengers provide proof of vaccination in order to fly?

- Yes: 58%
- No: 28%
- Not sure: 15%

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

| | Yes | No | Don't know |
|------------------------|------------|-----------|-------------------|
| Laid off employees | 55% | 41% | 4% |
| Furloughed employees | 46% | 48% | 6% |
| Pay cuts for employees | 44% | 49% | 7% |

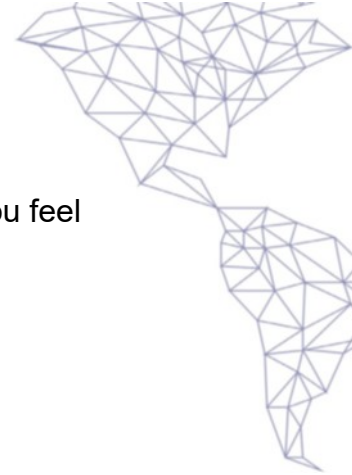
17. [DISPLAY IF Q16=YES FOR FURLOUGHS] You mentioned your company furloughed employees as a result of the coronavirus. Thinking about the employees who were affected, which of the following best describes their current status? Thinking about your company, when does it plan to have most of its employees return to the office?

- All have returned to work: 10%
- Most have returned to work: 15%
- Some have returned to work: 45%
- All remain furloughed or have since been laid off: 30%

18. [DISPLAY IF Q1=BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- Very willing: 5%
- Somewhat willing: 50%
- Neither willing nor unwilling: 18%
- Not willing: 15%
- Not willing at all: 2%
- Not sure: 10%





19. [DISPLAY IF Q1=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: 30%
- Neither optimistic nor pessimistic: 20%
- Pessimistic: 36%
- Very pessimistic: 8%
- Not sure: 3%

20. 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 | 72% | 21% | 3% | 2% | 2% |
| Hong Kong | 75% | 19% | 3% | 1% | 2% |
| Taiwan | 72% | 20% | 4% | 1% | 3% |
| Other APAC | 66% | 25% | 5% | 2% | 2% |
| Europe | 53% | 33% | 7% | 4% | 2% |
| United States | 32% | 42% | 13% | 7% | 5% |
| Canada | 60% | 26% | 7% | 4% | 3% |
| Latin America | 61% | 28% | 5% | 3% | 2% |
| Middle East | 63% | 26% | 5% | 4% | 2% |
| All International | 53% | 36% | 7% | 2% | 2% |
| All Domestic Travel | 19% | 46% | 17% | 9% | 9% |
| All Travel (Domestic and International) | 22% | 54% | 16% | 6% | 2% |



21. 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 |
|--|---|---|---|----------|
| China | 7% | 43% | 32% | 18% |
| Hong Kong | 4% | 44% | 35% | 17% |
| Taiwan | 5% | 43% | 34% | 18% |
| Asia Pacific (minus China, Hong Kong and Taiwan) | 5% | 45% | 33% | 16% |
| Europe | 14% | 48% | 26% | 11% |
| Latin America | 7% | 45% | 31% | 16% |
| United States | 20% | 46% | 22% | 12% |
| Canada | 12% | 49% | 25% | 15% |
| Middle East | 7% | 44% | 33% | 16% |
| All International Travel | 7% | 51% | 28% | 14% |
| All Domestic Travel | 26% | 46% | 16% | 11% |
| All Travel | 14% | 52% | 20% | 14% |

22. The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a month ago, how do you feel about the industry's path to recovery?

- I am more optimistic than I was last month: 21%
- I feel the same as last month: 60%
- I am more pessimistic than I was last month: 19%

23. 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: 19%
- Our bookings have remained the same: 58%
- Our bookings have decreased: 23%