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FOR OFFICE USE ONLY:
Questionnaire No.: _____
Card No.: _____

GLOBAL CWT SURVEY – Business travelers
Posted Questionnaire
Fall 2005
TOPLINES

SAMPLE DEFINITIONS

Total Sample:

Survey among 2,100 business travelers across 13 countries
o Estimated margin of error: +/- 2.1% at 95% confidence

Regional Sample:

North America (N=450): Estimated MOE: +/- 4.6% at 95% confidence
USA (N=300); Canada (N=150)

Asia Pacific (N=600): Estimated MOE: +/- 4.0% at 95% confidence
China (N=150); Australia (N=150); Japan (N=150); India (N=150)

Europe (N=750): Estimated MOE: +/- 3.6% at 95% confidence
UK (N=150); Germany (N=150); France (N=150); Italy (N=150); Spain (N=150)

Brazil (N=300): Estimated MOE: +/- 5.7% at 95% confidence

SCREENER QUESTIONS

S1. What is your current age?

	Total	North America	Europe	Asia Pacific	Brazil
21-30	8%	3%	17%	9%	20%
NET: 31-50	50%	42%	57%	61%	59%
31-40	21%	15%	27%	30%	26%
41-50	29%	27%	30%	31%	32%
NET: 51+	42%	54%	27%	30%	21%
51-60	27%	31%	21%	23%	16%
60+	15%	24%	6%	7%	5%

S2. How many times in an average year do you travel for business purposes?

	Total	North America	Europe	Asia Pacific	Brazil
6 - 10 times	49%	47%	46%	60%	33%
11 - 20 times	23%	24%	21%	23%	23%
21 - 30 times	10%	12%	11%	5%	11%
31 - 40 times	5%	5%	7%	4%	6%
41 - 50 times	5%	6%	5%	3%	12%
More than 50 times	7%	6%	11%	4%	16%
6 - 10 times	49%	47%	46%	60%	33%
DK/Refused	-	-	-	-	-

CORE QUESTIONS

1. I am going to read to you a series of events or characteristics that potentially impact business travel **negatively**. After I read each one, I would like you to tell me how often these events or characteristics impact your business travel experience?

	Total	North America	Europe	Asia Pacific	Brazil
a) Airport security lines					
Net: Frequently/Occasionally	49%	50%	44%	52%	49%
Frequently	25%	26%	21%	28%	27%
Occasionally	23%	24%	22%	24%	22%
Net: Rarely/Never	50%	50%	56%	46%	49%
Rarely	23%	24%	21%	21%	29%
Never	27%	25%	34%	25%	21%
Don't know/refused	1%	1%	1%	2%	1%
b) Flight delays					
Net: Frequently/Occasionally	60%	56%	68%	61%	65%
Frequently	24%	22%	27%	23%	37%
Occasionally	36%	33%	41%	39%	28%
Net: Rarely/Never	39%	43%	32%	37%	34%
Rarely	24%	24%	21%	28%	29%
Never	15%	19%	10%	10%	5%
Don't know/refused	1%	1%	0%	1%	1%
c) Work / Life balance					
Net: Frequently/Occasionally	51%	54%	50%	46%	54%
Frequently	21%	24%	19%	17%	25%
Occasionally	30%	30%	31%	29%	30%
Net: Rarely/Never	43%	38%	45%	49%	43%
Rarely	22%	20%	22%	25%	31%
Never	21%	19%	24%	24%	12%
Don't know/refused	6%	7%	5%	5%	3%

	Total	North America	Europe	Asia Pacific	Brazil
d) Corporate travel policy restrictions					
Net: Frequently/Occasionally	27%	25%	29%	29%	27%
Frequently	10%	9%	12%	10%	11%
Occasionally	17%	16%	17%	18%	16%
Net: Rarely/Never	71%	73%	69%	69%	70%
Rarely	25%	28%	23%	22%	37%
Never	46%	46%	46%	47%	33%
Don't know/refused	2%	2%	2%	3%	2%
e) Safety or terrorist concerns					
Net: Frequently/Occasionally	26%	28%	24%	22%	38%
Frequently	9%	10%	9%	7%	26%
Occasionally	17%	18%	15%	16%	12%
Net: Rarely/Never	74%	72%	76%	76%	61%
Rarely	29%	31%	28%	27%	34%
Never	44%	41%	48%	48%	27%
Don't know/refused	-	-	-	2%	1%
f) Customer service					
Net: Frequently/Occasionally	48%	53%	42%	42%	55%
Frequently	21%	25%	17%	16%	37%
Occasionally	26%	27%	25%	26%	18%
Net: Rarely/Never	51%	47%	57%	56%	43%
Rarely	29%	28%	26%	33%	27%
Never	22%	18%	31%	24%	16%
Don't know/refused	1%	1%	1%	2%	2%
g) Airline management issues such as strikes, bankruptcies, etc.					
Net: Frequently/Occasionally	25%	23%	35%	19%	37%
Frequently	7%	5%	10%	5%	17%
Occasionally	18%	17%	24%	14%	20%
Net: Rarely/Never	74%	77%	65%	79%	62%
Rarely	30%	31%	26%	30%	40%
Never	44%	46%	38%	49%	22%
Don't know/refused	1%	-	-	2%	1%

2. For each of the following areas or regions around the world, please tell me how hesitant you would be if you had to travel there on business.

	Total	North America	Europe	Asia Pacific	Brazil
a) North America					
Net: Hesitant	11%	7%	13%	16%	72%
Very hesitant	3%	2%	2%	4%	28%
Somewhat hesitant	8%	4%	11%	13%	44%
Net: Not hesitant	87%	92%	86%	82%	27%
Not too hesitant	16%	16%	15%	16%	9%
Not at all	72%	77%	70%	65%	18%
Don't know/refused	1%	1%	1%	2%	1%

	Total	North America	Europe	Asia Pacific	Brazil
b) The Middle East					
Net: Hesitant	74%	83%	68%	63%	62%
Very hesitant	46%	63%	29%	25%	39%
Somewhat hesitant	29%	20%	39%	38%	23%
Net: Not hesitant	23%	15%	30%	35%	35%
Not too hesitant	9%	4%	14%	15%	13%
Not at all	14%	11%	16%	20%	22%
Don't know/refused	2%	2%	3%	3%	3%
c) Latin America					
Net: Hesitant	46%	59%	30%	33%	62%
Very hesitant	11%	15%	6%	5%	22%
Somewhat hesitant	36%	44%	25%	28%	40%
Net: Not hesitant	52%	40%	66%	66%	36%
Not too hesitant	21%	16%	27%	26%	13%
Not at all	31%	24%	39%	40%	24%
Don't know/refused	2%	1%	3%	2%	2%
d) Africa					
Net: Hesitant	53%	59%	44%	48%	63%
Very hesitant	19%	26%	10%	13%	21%
Somewhat hesitant	34%	33%	35%	36%	42%
Net: Not hesitant	45%	39%	52%	49%	35%
Not too hesitant	19%	15%	23%	22%	14%
Not at all	26%	24%	29%	27%	20%
Don't know/refused	2%	2%	3%	3%	2%
e) Asia/Pacific					
Net: Hesitant	38%	53%	25%	16%	69%
Very hesitant	12%	19%	5%	3%	28%
Somewhat hesitant	26%	34%	19%	13%	41%
Net: Not hesitant	60%	46%	72%	82%	29%
Not too hesitant	19%	16%	24%	22%	12%
Not at all	40%	30%	48%	60%	18%
Don't know/refused	2%	1%	4%	2%	2%
f) Europe					
Net: Hesitant	22%	36%	4%	6%	72%
Very hesitant	6%	8%	1%	1%	48%
Somewhat hesitant	17%	28%	3%	5%	24%
Net: Not hesitant	77%	63%	96%	93%	27%
Not too hesitant	13%	17%	8%	11%	7%
Not at all	63%	46%	87%	82%	20%
Don't know/refused	1%	1%	1%	2%	1%

3. Now I am going to read to you a series of possibilities regarding how business travel might look in five years. After I read each one, I would like you to tell me how likely you believe this possibility is to be part of business travel in five years?

	Total	North America	Europe	Asia Pacific	Brazil
a) Very few major airlines and many discount airlines					
Net: Likely	69%	74%	61%	66%	76%
Very likely	34%	38%	30%	28%	44%
Somewhat likely	35%	37%	30%	38%	32%
Net: Not likely	29%	23%	38%	31%	24%
Not too likely	21%	17%	30%	22%	22%
Not at all likely	7%	6%	8%	9%	2%
Don't know/refused	2%	2%	2%	3%	-
b) Advanced security check-in with fingerprint or eyeprint technology for everyone					
Net: Likely	84%	84%	84%	84%	79%
Very likely	53%	52%	58%	50%	43%
Somewhat likely	31%	32%	26%	33%	35%
Net: Not likely	15%	15%	15%	15%	21%
Not too likely	10%	8%	12%	10%	19%
Not at all likely	6%	7%	4%	5%	2%
Don't know/refused	1%	1%	-	1%	-
c) Virtually all bookings completed online					
Net: Likely	89%	89%	90%	88%	90%
Very likely	62%	64%	60%	60%	65%
Somewhat likely	27%	25%	30%	28%	25%
Net: Not likely	11%	11%	10%	12%	10%
Not too likely	7%	7%	8%	7%	8%
Not at all likely	4%	4%	2%	5%	2%
Don't know/refused	-	-	-	-	-
d) Less distinction in service between economy and first class					
Net: Likely	49%	60%	33%	41%	51%
Very likely	20%	26%	12%	15%	25%
Somewhat likely	29%	34%	21%	27%	27%
Net: Not likely	49%	39%	63%	57%	49%
Not too likely	28%	20%	40%	32%	38%
Not at all likely	21%	19%	24%	24%	10%
Don't know/refused	2%	-	3%	2%	-
e) Flight-crew size reductions					
Net: Likely	61%	66%	54%	54%	61%
Very likely	27%	36%	20%	13%	28%
Somewhat likely	33%	30%	34%	41%	33%
Net: Not likely	36%	30%	44%	40%	39%
Not too likely	23%	19%	31%	25%	35%
Not at all likely	12%	12%	12%	16%	4%
Don't know/refused	3%	3%	2%	6%	-

	Total	North America	Europe	Asia Pacific	Brazil
f) Enhanced food and beverage service					
Net: Likely	39%	33%	36%	54%	53%
Very likely	16%	15%	11%	23%	23%
Somewhat likely	23%	18%	25%	31%	30%
Net: Not likely	61%	67%	62%	45%	47%
Not too likely	33%	32%	39%	30%	41%
Not at all likely	28%	36%	23%	15%	6%
Don't know/refused	1%	-	2%	1%	-
g) Increased use of video conferencing within organizations to reduce the number of flights taken.					
Net: Likely	81%	87%	76%	75%	74%
Very likely	56%	64%	50%	42%	45%
Somewhat likely	26%	22%	26%	33%	29%
Net: Not likely	17%	11%	23%	24%	24%
Not too likely	12%	8%	15%	16%	20%
Not at all likely	6%	3%	8%	9%	4%
Don't know/refused	1%	2%	1%	1%	2%

4. Which of the following choices would you say comes closest to representing your biggest pet peeve (what annoys you most) while you are traveling for business?

	Total	North America	Europe	Asia Pacific	Brazil
Travelers not checking luggage when they should (oversized bags)	18%	18%	20%	16%	15%
Crying babies or loud children	17%	17%	14%	21%	17%
Travelers stowing their carry-on luggage in overhead bins far forward from their seats	14%	20%	8%	9%	4%
Neighboring passengers who disturb you by not letting you either read, work or sleep	11%	6%	19%	11%	26%
Travelers talking on the phone too loud	10%	9%	14%	10%	9%
Travelers attempting to board the planes before their row is called	8%	6%	9%	13%	8%
Discovering another traveler paid less for the same flight	7%	9%	4%	5%	11%

	Total	North America	Europe	Asia Pacific	Brazil
Security check-ins	7%	8%	5%	7%	6%
Travelers on vacation or holiday	1%	1%	2%	1%	1%
DK/Refused DNR	6%	6%	4%	6%	3%

5. Are you in favor of allowing airline passengers to use their cell phone while in-flight?

	Total	North America	Europe	Asia Pacific	Brazil
Yes	36%	40%	28%	36%	38%
No	61%	57%	70%	62%	61%
DK/Refused DNR	3%	4%	1%	2%	-

6. If you were to estimate, what percentage of the time do you fly on airlines that would be considered Low Cost Carriers for your business travel (JetBlue, Southwest, Ryanair, Jetstar Airways, etc.)?

	Total	North America	Europe	Asia Pacific	Brazil
0%	32%	29%	47%	26%	4%
1 - 10%	19%	21%	16%	18%	16%
11 - 20%	9%	8%	8%	10%	6%
21% - 40%	10%	10%	9%	11%	21%
41% - 60%	14%	14%	10%	16%	23%
61% - 80%	7%	9%	4%	6%	13%
81% - 100%	7%	7%	5%	8%	15%
DK/Refused	-	-	-	-	-

7. If you were to estimate, what percentage of the time do you book your business travel online (air, hotel, rental car, etc.)?

	Total	North America	Europe	Asia Pacific	Brazil
0%	24%	23%	32%	20%	15%
1 - 10%	14%	13%	16%	14%	14%
11 - 20%	5%	5%	5%	7%	6%
21% - 40%	5%	5%	4%	7%	8%
41% - 60%	10%	10%	9%	12%	15%
61% - 80%	10%	10%	8%	11%	14%
81% - 100%	29%	32%	22%	29%	24%
DK/Refused DNR	3%	2%	4%	2%	4%

8. From the following list of choices, when you choose **not** to book online, what would you say is the main reason for that decision?

	Total	North America	Europe	Asia Pacific	Brazil
You have an assistant or travel arranger who books most of your travel	24%	15%	40%	27%	23%
You prefer the personal touch of an agent	14%	17%	12%	10%	30%
Complicated itinerary	13%	16%	10%	13%	11%
You have questions about your booking that cannot be answered online	12%	14%	8%	14%	6%
Online self-booking in not an option	7%	9%	6%	4%	6%
Too busy to self-book	6%	5%	6%	7%	5%
International travel	3%	5%	1%	3%	2%
Online self-booking is too difficult	3%	2%	1%	6%	1%
Need a paper ticket	2%	2%	2%	2%	2%
You always book online (VOLUNTEERED)	10%	11%	7%	12%	10%
DK/Refused DNR	5%	5%	6%	4%	5%

9. Thinking about 2006, do you think your business travel will.....?

	Total	North America	Europe	Asia Pacific	Brazil
Net: Increase	32%	27%	32%	44%	49%
Increase significantly	10%	8%	10%	14%	20%
Increase slightly	22%	19%	22%	30%	29%
Stay about the same	48%	49%	51%	45%	38%
Net: Decrease	19%	24%	15%	11%	11%
Decrease slightly	12%	14%	11%	8%	9%
Decrease significantly	7%	10%	4%	3%	3%
DK/Refused	-	-	-	-	-

10. How often do you extend a business trip, either on the front end or the back end, to include leisure or vacation time?

	Total	North America	Europe	Asia Pacific	Brazil
Never	42%	36%	54%	43%	29%
1 - 2 times per year	39%	44%	30%	38%	44%
3 - 5 times per year	13%	13%	11%	12%	15%
6 - 10 times per year	3%	3%	2%	4%	6%
11 - 15 times per year	1%	1%	1%	1%	1%
16 - 20 times per year	1%	-	1%	-	1%
More than 20 times per year	1%	1%	1%	-	1%
DK/Refused DNR	1%	2%	-	-	3%

(IF EXTENDED BUSINESS TRIP)

11. If you were to estimate, what percentage of the time do your friends or family join you for these leisure or vacation extensions?

	Total	North America	Europe	Asia Pacific	Brazil
Net: Rarely/Never	53%	47%	63%	58%	53%
Never	21%	16%	32%	24%	7%
Rarely	32%	31%	31%	34%	46%
Net: Rarely/Never	47%	53%	37%	41%	46%
Occasionally	28%	33%	21%	22%	30%
Frequently	19%	20%	15%	19%	16%
DK/Refused DNR	-	-	-	-	-

(CONTINUE TO ALL RESPONDENTS)

Now just a couple more questions for statistical purposes.

How long would you estimate that you have been traveling for business purposes?

	Total	North America	Europe	Asia Pacific	Brazil
Less than 1 year	5%	2%	10%	3%	14%
1 - 2 years	8%	5%	12%	10%	8%
3 - 5 years	14%	11%	15%	22%	14%
5 - 10 years	18%	17%	17%	22%	20%
More than 10 years	53%	63%	43%	43%	42%
DK/Refused DNR	2%	3%	2%	1%	2%

If you were to estimate, what is your company's yearly total revenue worldwide?

US\$	Total	North America	Europe	Asia Pacific	Brazil
\$1 - \$800,000	12%	12%	3%	20%	21%
\$801,000 - \$8,400,000	12%	9%	8%	23%	14%
\$8,401,000 - \$175,920,000	15%	12%	15%	21%	5%
\$176,000,000 - \$586,999,660,930	15%	14%	27%	7%	1%
DK/Refused DNR	46%	53%	47%	29%	59%

GENDER:

	Total	North America	Europe	Asia Pacific	Brazil
Male	63%	52%	75%	73%	61%
Female	37%	48%	25%	27%	39%