

KRC Research
700 13th St. NW
Suite 800
Washington, DC 20005

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

GLOBAL CWT SURVEY – Travel Managers
Posted Questionnaire
Fall 2005
TOPLINES

SAMPLE DEFINITIONS

Total Sample:

- Survey among 650 travel managers across 13 countries
- o Estimated margin of error: +/- 3.8% at 95% confidence

Regional Sample:

North America (N=150): Estimated MOE: +/- 8.0% at 95% confidence
USA (N=100); Canada (N=50)

Asia Pacific (N=200): Estimated MOE: +/- 6.9% at 95% confidence
China (N=50); Australia (N=50); Japan (N=50); India (N=50)

Europe (N=250): Estimated MOE: +/- 6.2% at 95% confidence
UK (N=50); Germany (N=50); France (N=50); Italy (N=50); Spain (N=50)

Brazil (N=50): Estimated MOE: +/- 13.9% at 95% confidence

BACKGROUND QUESTIONS

1. Which of the following statements best describes your role within your company's travel management division? (SELECT ALL THAT APPLY)

	Total	North America	Europe	Asia Pacific	Brazil
Set corporate travel policy	68%	76%	63%	56%	36%
Negotiate with travel suppliers	76%	78%	82%	69%	46%
Monitor traveler whereabouts	68%	79%	62%	54%	18%
Supervise travel management team	52%	52%	50%	59%	8%
Corporate travel management team member	44%	48%	37%	42%	38%

2. To the best of your knowledge, what is your company's annual volume or annual spend on air travel?

US\$	Total	North America	Europe	Asia Pacific	Brazil
\$1 - \$85,000	14%	2%	8%	47%	44%
\$86,000 - \$1,175,000	16%	14%	20%	17%	10%
\$1,176,000 - \$8,225,000	25%	27%	39%	5%	4%
\$8,226,000 - \$12,000,000,000	30%	49%	14%	2%	28%
DK/Refused DNR	15%	8%	19%	29%	14%

CORE QUESTIONS

3. 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 **your business travelers tell you** that these events or characteristics impact their business travel experience?

	Total	North America	Europe	Asia Pacific	Brazil
a) Airport security lines					
Net: Frequently/Occasionally	58%	69%	40%	51%	54%
Frequently	26%	32%	17%	23%	22%
Occasionally	31%	37%	23%	28%	32%
Net: Rarely/Never	40%	29%	57%	48%	44%
Rarely	24%	20%	33%	26%	28%
Never	16%	9%	25%	22%	16%
Don't know/refused	2%	3%	2%	1%	2%
b) Flight delays					
Net: Frequently/Occasionally	79%	82%	75%	74%	76%
Frequently	37%	39%	35%	36%	38%
Occasionally	41%	44%	40%	38%	38%
Net: Rarely/Never	21%	17%	25%	25%	24%
Rarely	17%	14%	21%	21%	20%
Never	4%	3%	4%	5%	4%
Don't know/refused	1%	1%	-	-	-
c) Work / Life balance					
Net: Frequently/Occasionally	48%	54%	39%	43%	44%
Frequently	19%	22%	17%	14%	20%
Occasionally	28%	32%	21%	28%	24%
Net: Rarely/Never	47%	39%	56%	52%	54%
Rarely	25%	21%	28%	28%	38%
Never	22%	18%	29%	25%	16%
Don't know/refused	6%	7%	5%	5%	2%
d) Corporate travel policy restrictions					
Net: Frequently/Occasionally	60%	65%	57%	52%	52%
Frequently	24%	22%	29%	21%	20%
Occasionally	36%	43%	28%	30%	32%
Net: Rarely/Never	39%	35%	42%	46%	46%
Rarely	27%	28%	27%	22%	36%
Never	12%	6%	16%	23%	10%
Don't know/refused	1%	-	-	2%	2%

	Total	North America	Europe	Asia Pacific	Brazil
e) Safety or terrorist concerns					
Net: Frequently/Occasionally	41%	45%	34%	43%	34%
Frequently	10%	11%	10%	10%	22%
Occasionally	31%	34%	24%	33%	12%
Net: Rarely/Never	58%	55%	65%	56%	66%
Rarely	40%	45%	39%	30%	38%
Never	18%	10%	26%	26%	28%
Don't know/refused	1%	-	1%	1%	-
f) Customer service					
Net: Frequently/Occasionally	65%	76%	51%	54%	74%
Frequently	29%	35%	26%	20%	44%
Occasionally	36%	41%	25%	35%	30%
Net: Rarely/Never	34%	23%	47%	44%	26%
Rarely	24%	19%	30%	31%	20%
Never	10%	5%	17%	13%	6%
Don't know/refused	1%	1%	2%	2%	-
g) Airline management issues such as strikes, bankruptcies, etc.					
Net: Frequently/Occasionally	40%	39%	46%	37%	40%
Frequently	10%	8%	16%	7%	16%
Occasionally	30%	31%	29%	30%	24%
Net: Rarely/Never	59%	61%	54%	62%	58%
Rarely	44%	48%	42%	35%	40%
Never	16%	13%	12%	27%	18%
Don't know/refused	-	-	-	1%	2%

4. For each of the following areas or regions around the world, please tell me how hesitant **you believe your business travelers** would be if they had to travel there on business.

	Total	North America	Europe	Asia Pacific	Brazil
a) North America					
Net: Very/Somewhat Hesitant	7%	2%	9%	12%	56%
Very hesitant	2%	1%	2%	1%	24%
Somewhat hesitant	5%	1%	7%	12%	32%
Net: Not Too/Not At All Hesitant	89%	97%	85%	79%	42%
Not too hesitant	10%	5%	15%	16%	16%
Not at all	79%	92%	69%	64%	26%
Don't know/refused	4%	1%	6%	8%	2%
b) The Middle East					
Net: Very/Somewhat Hesitant	67%	74%	56%	60%	50%
Very hesitant	29%	38%	18%	20%	30%
Somewhat hesitant	38%	37%	39%	40%	20%
Net: Not Too/Not At All Hesitant	27%	23%	32%	28%	42%
Not too hesitant	12%	8%	16%	15%	18%
Not at all	15%	15%	16%	13%	24%
Don't know/refused	7%	3%	12%	11%	8%

	Total	North America	Europe	Asia Pacific	Brazil
c) Latin America					
Net: Very/Somewhat Hesitant	26%	28%	18%	29%	62%
Very hesitant	3%	2%	3%	4%	16%
Somewhat hesitant	24%	26%	15%	25%	46%
Net: Not Too/Not At All Hesitant	66%	69%	69%	59%	36%
Not too hesitant	28%	28%	29%	30%	12%
Not at all	38%	41%	40%	29%	24%
Don't know/refused	7%	3%	13%	12%	2%
d) Africa					
Net: Very/Somewhat Hesitant	38%	42%	31%	35%	48%
Very hesitant	8%	9%	7%	8%	12%
Somewhat hesitant	30%	33%	23%	27%	36%
Net: not too/not at all hesitant	52%	50%	54%	52%	46%
Not too hesitant	21%	18%	26%	21%	22%
Not at all	31%	32%	28%	30%	24%
Don't know/refused	11%	8%	15%	13%	6%
e) Asia/Pacific					
Net: Very/Somewhat Hesitant	18%	21%	16%	10%	34%
Very hesitant	2%	2%	2%	2%	12%
Somewhat hesitant	15%	19%	14%	8%	22%
Net: Not Too/Not At All Hesitant	77%	75%	76%	83%	56%
Not too hesitant	23%	20%	24%	30%	32%
Not at all	54%	56%	53%	52%	24%
Don't know/refused	6%	4%	8%	8%	10%
f) Europe					
Net: Very/Somewhat Hesitant	7%	9%	3%	1%	54%
Very hesitant	1%		2%	1%	28%
Somewhat hesitant	5%	9%	1%	-	26%
Net: Not Too/Not At All Hesitant	91%	90%	95%	93%	42%
Not too hesitant	15%	17%	9%	15%	12%
Not at all	76%	72%	86%	78%	30%
Don't know/refused	3%	2%	2%	6%	4%

5. 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: Very/Somewhat Likely	72%	84%	54%	63%	62%
Very likely	27%	33%	18%	23%	38%
Somewhat likely	45%	52%	36%	40%	24%
Net: Not Too/Not At All Likely	27%	14%	46%	34%	36%
Not too likely	20%	9%	36%	29%	34%
Not at all likely	6%	6%	10%	5%	2%
Don't know/refused	1%	1%	1%	3%	2%

	Total	North America	Europe	Asia Pacific	Brazil
b) Advanced security check-in with fingerprint or eyeprint technology for everyone					
Net: Very/Somewhat Likely	90%	93%	88%	90%	64%
Very likely	56%	57%	57%	54%	36%
Somewhat likely	35%	36%	32%	36%	28%
Net: Not Too/Not At All Likely	9%	7%	11%	10%	34%
Not too likely	8%	6%	9%	9%	28%
Not at all likely	1%	1%	1%	1%	6%
Don't know/refused	-	-	1%	-	2%
c) Virtually all bookings completed online					
Net: Very/Somewhat Likely	83%	81%	87%	83%	90%
Very likely	44%	34%	56%	50%	74%
Somewhat likely	39%	46%	32%	33%	16%
Net: Not Too/Not At All Likely	17%	19%	12%	17%	8%
Not too likely	12%	13%	9%	13%	8%
Not at all likely	5%	7%	3%	4%	-
Don't know/refused	-	-	-	-	2%
d) Less distinction in service between economy and first class					
Net: Very/Somewhat Likely	40%	48%	31%	32%	42%
Very likely	14%	16%	12%	9%	22%
Somewhat likely	26%	32%	19%	22%	20%
Net: Not Too/Not At All Likely	58%	50%	67%	68%	56%
Not too likely	36%	30%	41%	44%	44%
Not at all likely	22%	19%	26%	24%	12%
Don't know/refused	2%	2%	2%	1%	2%
e) Flight-crew size reductions					
Net: Very/Somewhat Likely	51%	53%	47%	52%	58%
Very likely	19%	23%	16%	12%	30%
Somewhat likely	32%	29%	31%	40%	28%
Net: Not Too/Not At All Likely	45%	45%	47%	45%	40%
Not too likely	33%	32%	35%	31%	32%
Not at all likely	13%	13%	12%	13%	8%
Don't know/refused	3%	2%	6%	3%	2%
f) Enhanced food and beverage service					
Net: Very/Somewhat Likely	31%	19%	36%	51%	60%
Very likely	9%	2%	10%	21%	22%
Somewhat likely	23%	17%	26%	30%	38%
Net: Not Too/Not At All Likely	68%	81%	62%	47%	38%
Not too likely	39%	39%	45%	33%	32%
Not at all likely	29%	41%	17%	14%	6%
Don't know/refused	1%	-	2%	2%	2%

	Total	North America	Europe	Asia Pacific	Brazil
g) Increased use of video conferencing within organizations to reduce the number of flights taken.					
Net: Very/Somewhat Likely	71%	70%	69%	73%	82%
Very likely	35%	29%	42%	41%	66%
Somewhat likely	35%	41%	27%	32%	16%
Net: Not Too/Not At All Likely	29%	29%	31%	27%	16%
Not too likely	24%	23%	27%	23%	14%
Not at all likely	5%	6%	4%	3%	2%
Don't know/refused	1%	1%	-	-	2%

6. Which of the following choices would you say comes closest to representing the biggest pet peeve of **your business travelers while they are traveling?** (What annoys them most?)

	Total	North America	Europe	Asia Pacific	Brazil
Discovering another traveler paid less for the same flight	21%	22%	28%	10%	18%
Security check-ins	15%	21%	6%	14%	4%
Neighboring passengers who disturb you by not letting you either read, work or sleep	14%	9%	21%	18%	38%
Travelers not checking luggage when they should (oversized bags)	10%	11%	8%	11%	8%
Crying babies or loud children	9%	8%	9%	12%	10%
Travelers stowing their carry-on luggage in overhead bins far forward from their seats	8%	9%	7%	5%	6%
Travelers talking on the phone too loud	8%	8%	5%	12%	6%
Travelers on vacation or holiday	3%	4%	2%	3%	
Travelers attempting to board the planes before their row is called	2%	2%	1%	5%	8%
DK/Refused DNR	9%	8%	13%	10%	2%

7. If you were to estimate, what percentage of your company's air volume is booked on airlines that would be considered Low Cost Carriers (JetBlue, Southwest, Ryanair, Jetstar Airways, etc.)?

	Total	North America	Europe	Asia Pacific	Brazil
0%	11%	4%	19%	22%	-
1 - 10%	47%	45%	57%	41%	30%
11 - 20%	23%	32%	16%	14%	8%
21% - 40%	11%	15%	3%	11%	22%
41% - 60%	3%	2%	3%	3%	14%
61% - 80%	2%	1%	1%	3%	12%
81% - 100%	1%	-	1%	1%	8%
DK/Refused DNR	2%	1%	-	6%	6%

8. From the following list of job characteristics, which characteristic of your job would you say you find most rewarding? (RANDOMIZE)

	Total	North America	Europe	Asia Pacific	Brazil
Demonstrating to senior management how the travel program is saving the company money each month	34%	37%	35%	26%	20%
Seeing how my efforts are promoting travel policy compliance and therefore cost savings	32%	34%	30%	28%	52%
Relationships I've built with travel suppliers (hotel, air, etc.)	14%	15%	12%	14%	6%
Working with the travel management company	8%	4%	13%	10%	12%
Moving travelers to online self-bookings	5%	6%	4%	7%	4%
Attending industry conferences and sharing experiences with peers	4%	4%	3%	4%	4%
DK/Refused DNR	4%	1%	3%	11%	2%

9. Which of the following descriptions comes closest to representing what you believe your company's leadership **most expects** from you or your position?

	Total	North America	Europe	Asia Pacific	Brazil
Cost Savings	54%	55%	57%	48%	64%
Traveler compliance with corporate travel policy	23%	21%	24%	26%	18%
Traveler safety	11%	9%	12%	14%	14%
Increasing online adoption	7%	9%	4%	6%	2%
Traveler tracking	3%	4%	2%	4%	2%
DK/Refused DNR	2%	3%	1%	2%	-

10. From the following list of choices, which statement comes closest to representing the extent to which your company is approaching consolidation of its travel program outside your country or region?

	Total	North America	Europe	Asia Pacific	Brazil
Undertaking a comprehensive global consolidation	26%	23%	29%	30%	16%
Consolidating piece by piece as the need arises	20%	19%	19%	21%	32%
Consolidating over a period of time by region	16%	17%	13%	17%	14%
Not consolidating at all	16%	16%	15%	16%	6%
Not applicable	21%	23%	22%	12%	32%
DK/Refused DNR	2%	1%	2%	3%	-

11. Thinking about 2006, do you think your company's spend on business travel will...

	Total	North America	Europe	Asia Pacific	Brazil
Net: Increase Significantly/Slightly	59%	63%	49%	59%	66%
Increase significantly	16%	18%	10%	17%	20%
Increase slightly	43%	45%	39%	42%	46%
Stay about the same	30%	29%	36%	25%	22%
Net: Decrease significantly/slightly	10%	8%	15%	11%	12%
Decrease slightly	9%	7%	14%	11%	6%
Decrease significantly	1%	1%	1%	1%	6%
DK/Refused DNR	1%	-	-	4%	-

Now just a couple more questions for statistical purposes.

How long have you been in a corporate travel management role?

	Total	North America	Europe	Asia Pacific	Brazil
Less than 1 year	5%	1%	10%	8%	10%
1 - 2 years	11%	7%	13%	18%	30%
3 - 5 years	23%	16%	33%	28%	30%
5 - 10 years	30%	37%	24%	23%	18%
More than 10 years	29%	38%	19%	21%	10%
DK/Refused DNR	1%	1%	1%	2%	2%

GENDER:

	Total	North America	Europe	Asia Pacific	Brazil
Male	36%	33%	40%	37%	38%
Female	64%	67%	60%	63%	62%