



GLOBAL TRAVEL DISTRIBUTION COVID-19 IMPACT

OCTOBER 2020



THE SURVEY

Travel Consul launched its second survey to better understand the impact of COVID-19 on the industry and the future recovery of global travel distribution.

This round was conducted from 14th - 28th September and gathered **1,021 complete responses** from travel executives (tour operators and agency owners) across the main outbound travel markets.

20+ SOURCE MARKETS

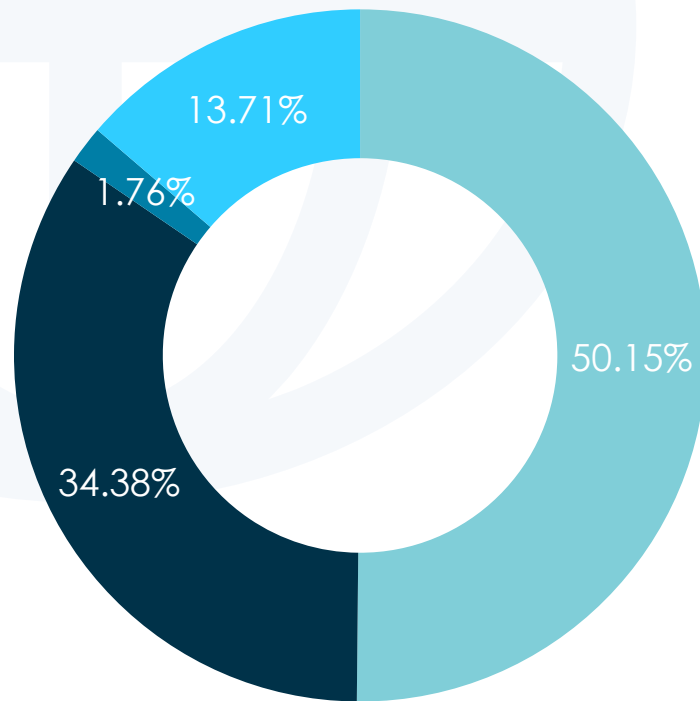
11 LANGUAGES



Respondents by company type and continent of main operation

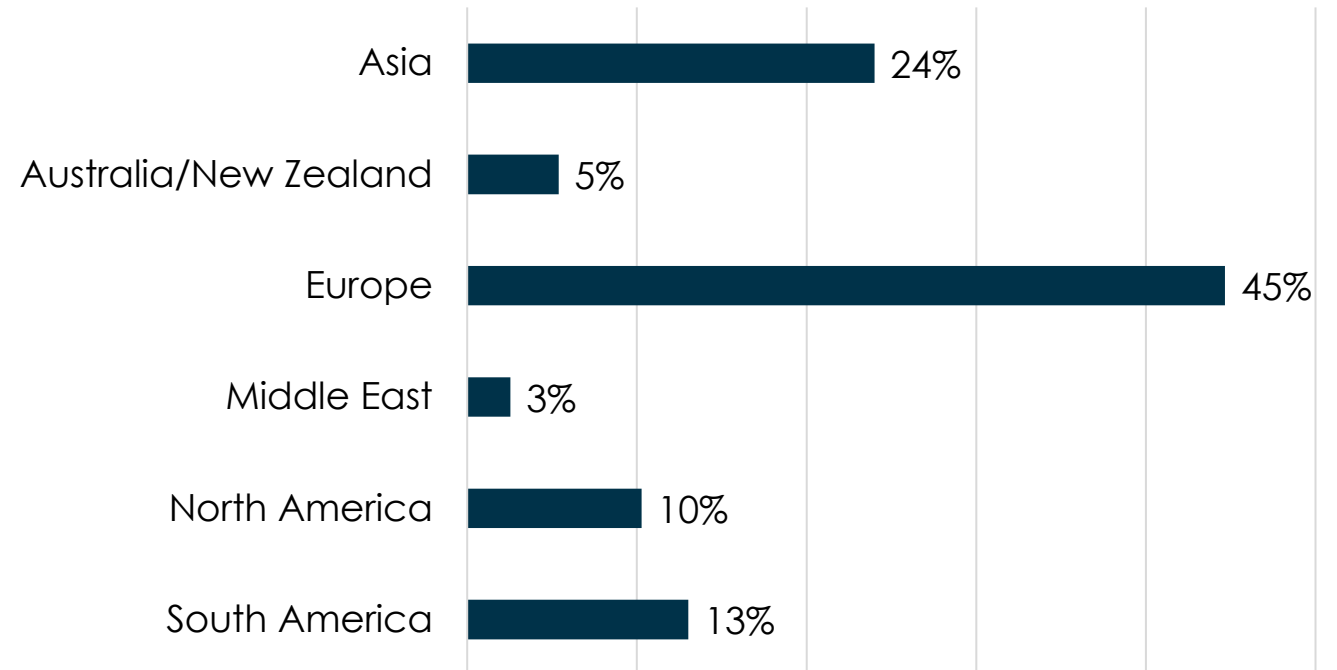
1,021 COMPLETE RESPONSES

Q1. Respondents by company type



■ Retail travel agency ■ Tour operator/wholesaler ■ GSA ■ Other

Q2. Continent of company's main operation



42% of the respondents believe their countries restarted cautiously but the epidemic is on the rise

Q4. What is your country's overall situation of COVID-19?

My country reopened cautiously, epidemic is on the rise
42%

My country's borders remain closed to travel internationally
32%

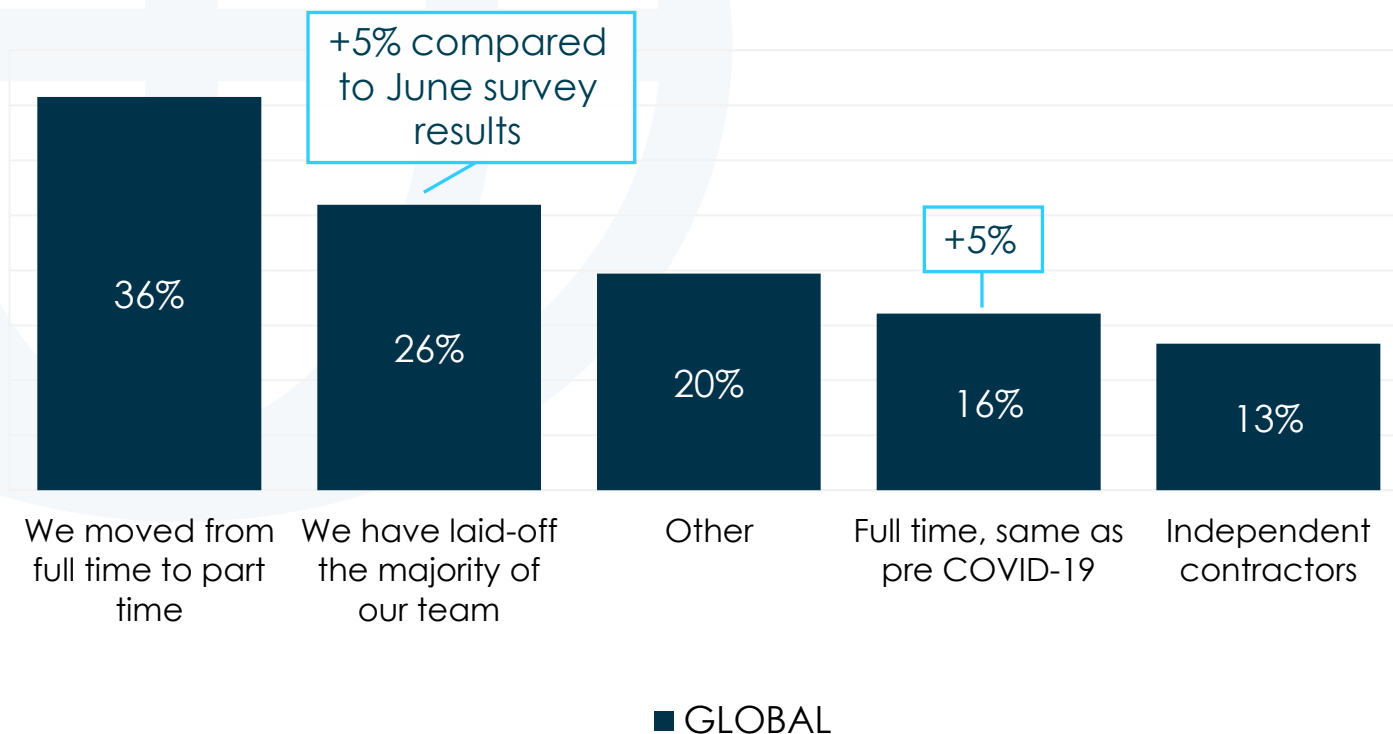
My country reopened cautiously, epidemic is on the decline
19%

Other
7%

COVID-19 EFFECTS ON THE COMPANY

Full-time work and layoffs register a 5% increase compared to June 2020

Q5. How is your team working today

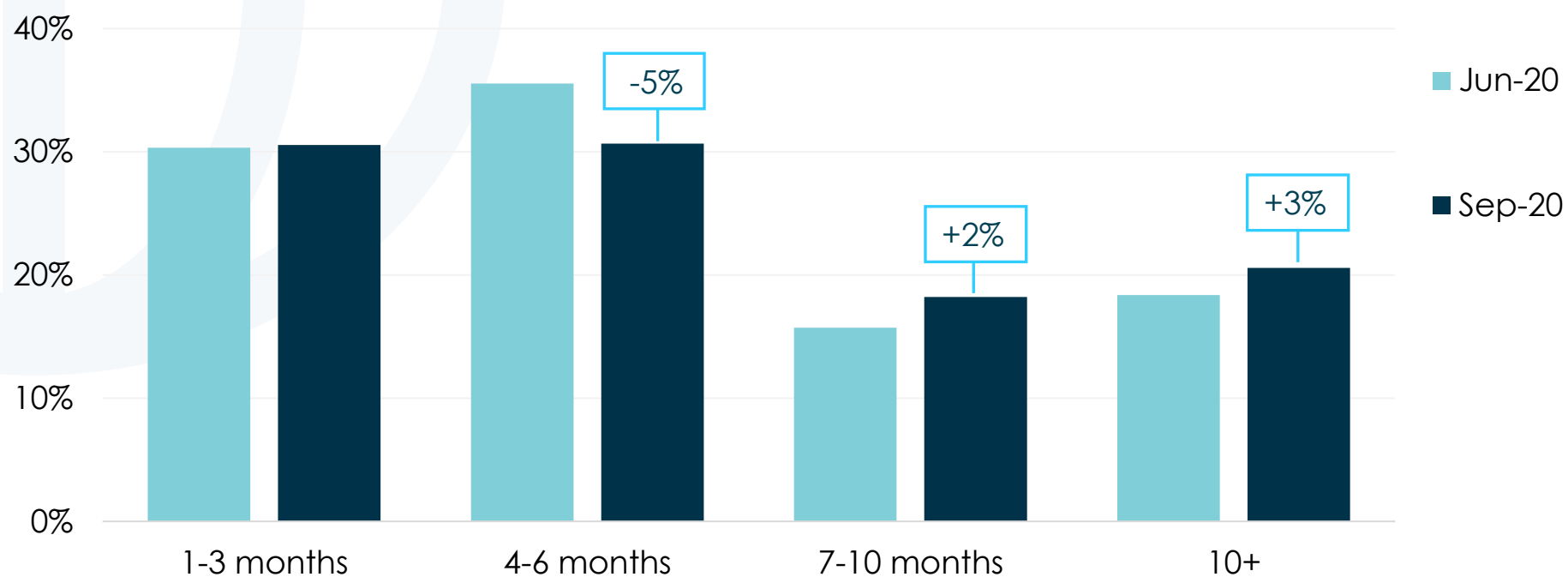


“OTHER” INCLUDE:

- Combination: full time to part time & partly laid-off
- On government furlough scheme
- Working from home
- Working less hours
- Pay cuts up to 50%
- Temporarily closed
- On sabbatical and expenses reduction

A positive shift in agencies' confidence

Q23. Under the current circumstances, with no government intervention, how long would you be able to sustain your business?



Impact on revenue

Q22. Compared to the last calendar year 2019-2020, what % drop do you expect in business volume (revenues) for Q4 2020 and Q1-Q2 2021?

ESTIMATED
DECREASE
IN BUSINESS
VOLUME

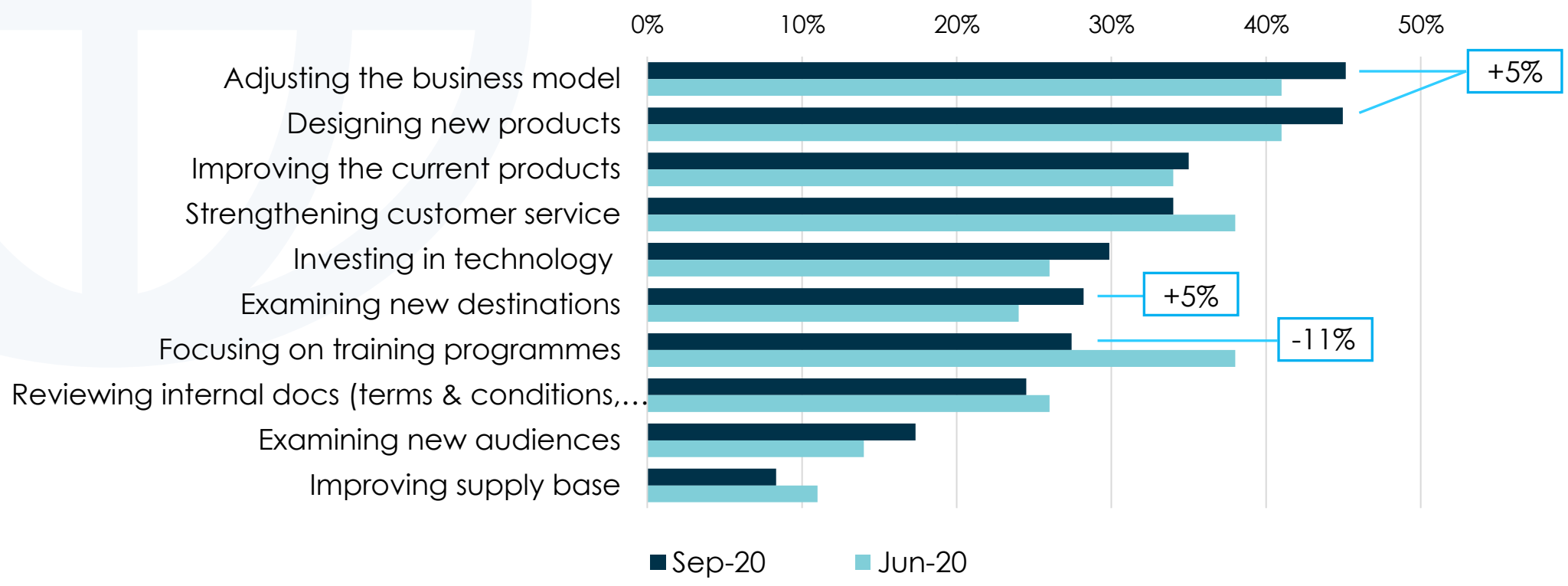
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76%	in Q4 2020
67%	in Q1 2021
51%	in Q2 2021

RESPONSE TO COVID-19

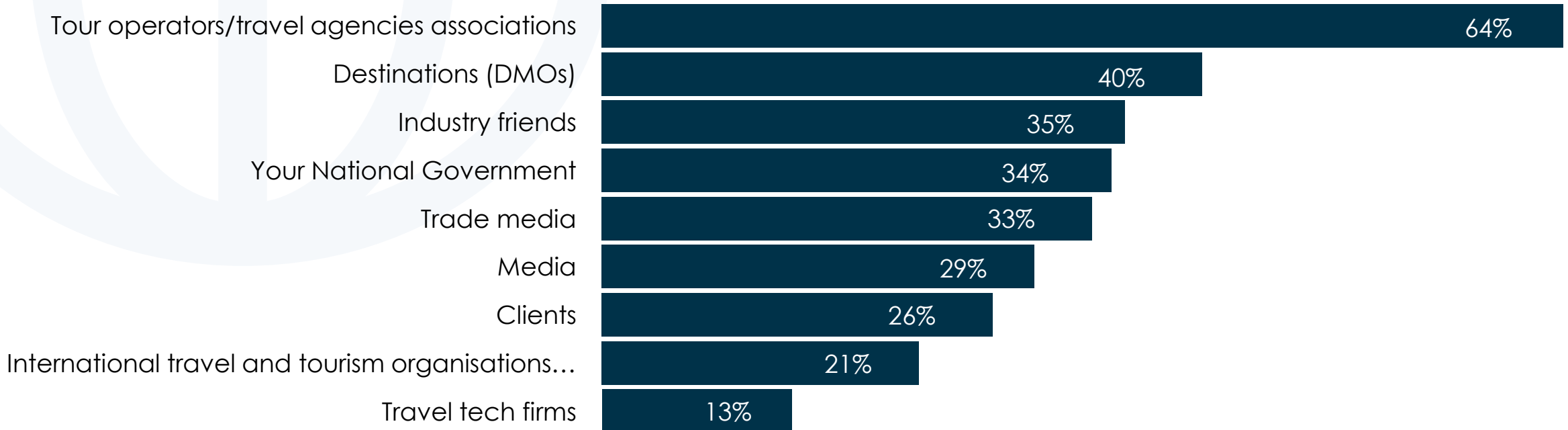
Training leads to new product development

Q7. What TOP THREE measures is your company implementing during this crisis?



Travel associations remain the primary data sources during the crisis

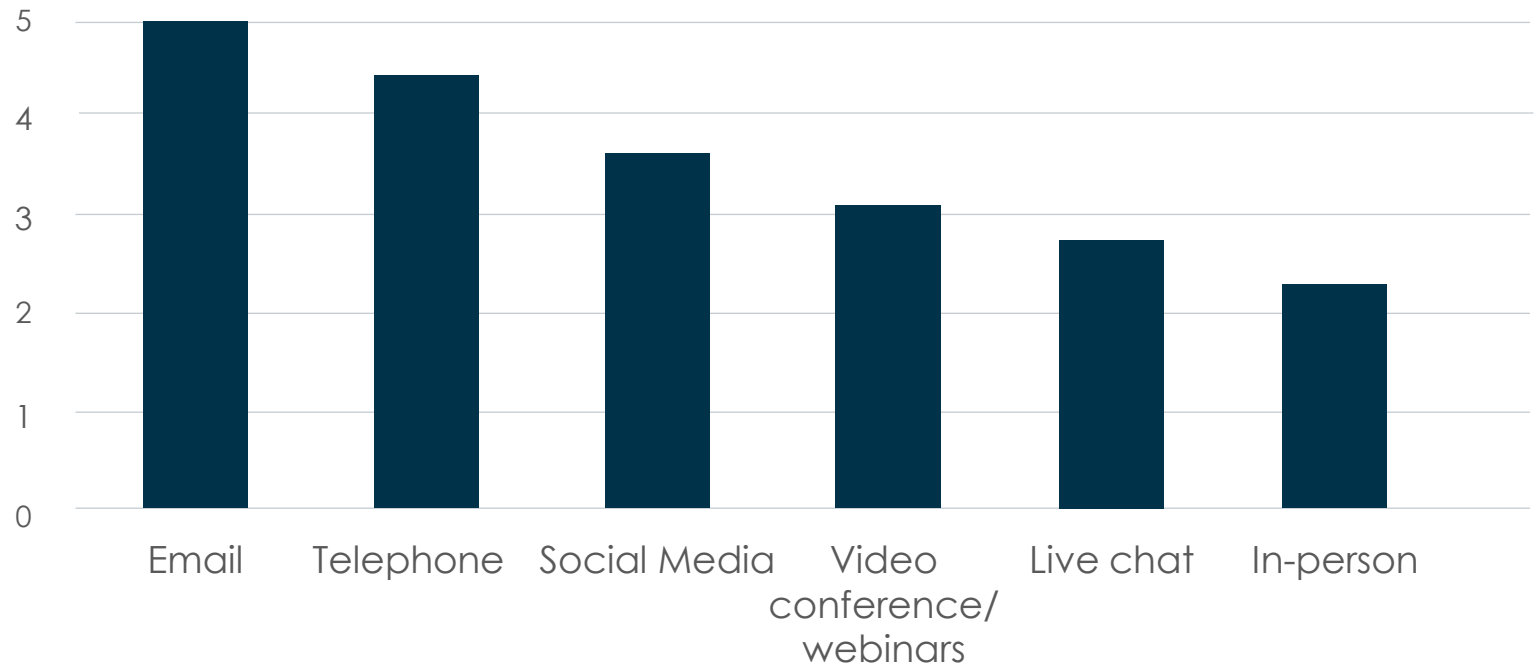
Q8. What TOP THREE data sources are you using to help you cope with this crisis?





The telephone continues to be the second most popular channel of communications

Q9. Which channels are you using to interact with your clients these days?
Please rank by order

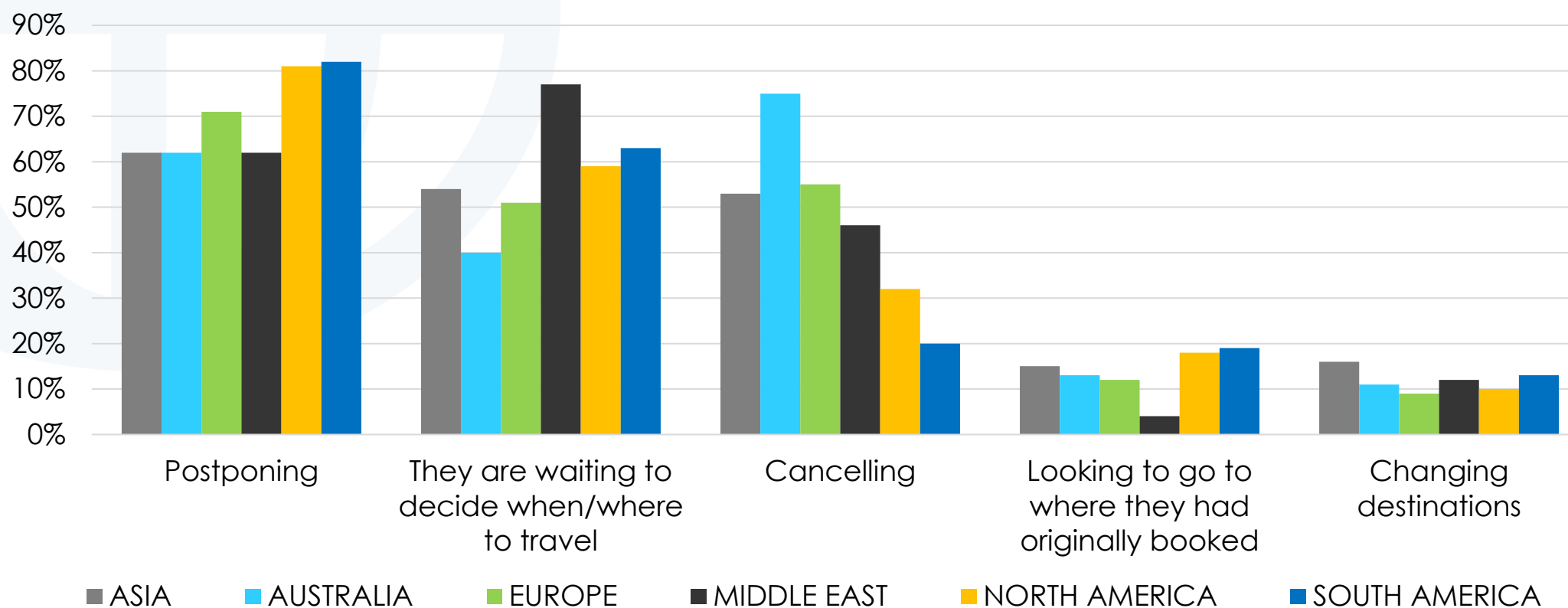




CLIENT PREFERENCES

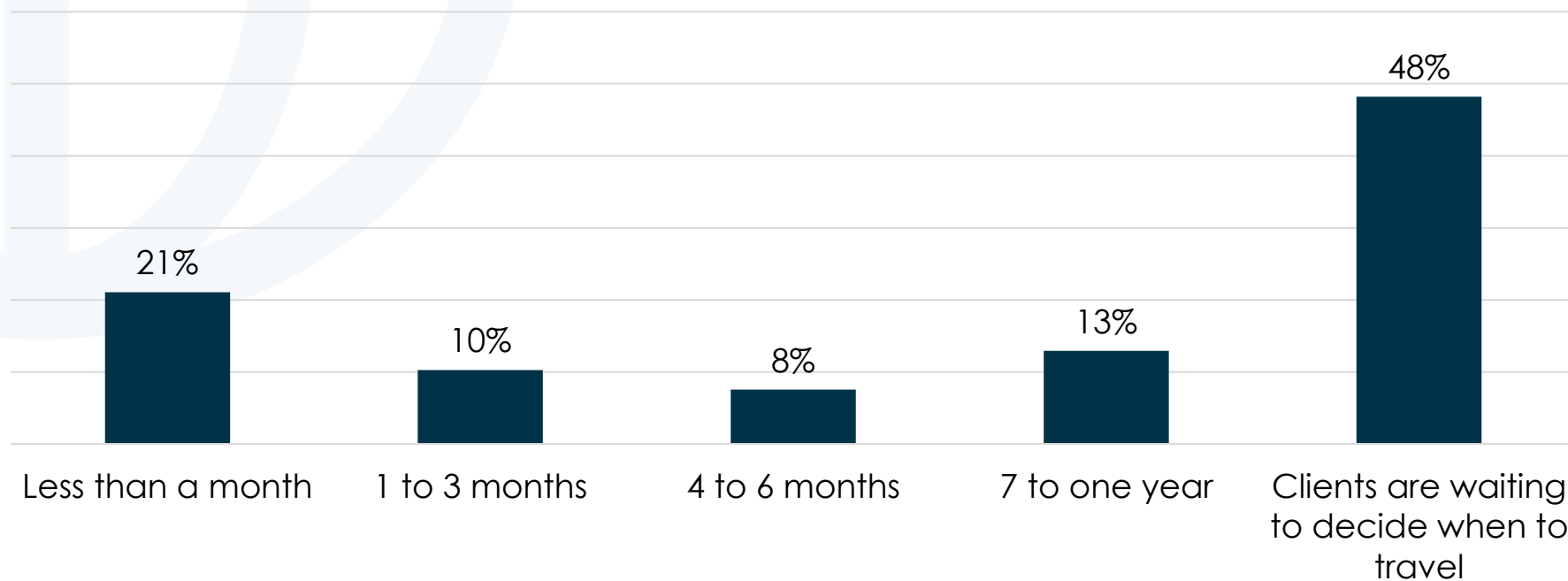
Postponing travel is still more prevalent than cancellations in most continents of the world

Q10. What are your clients' TOP TWO preferences these days?



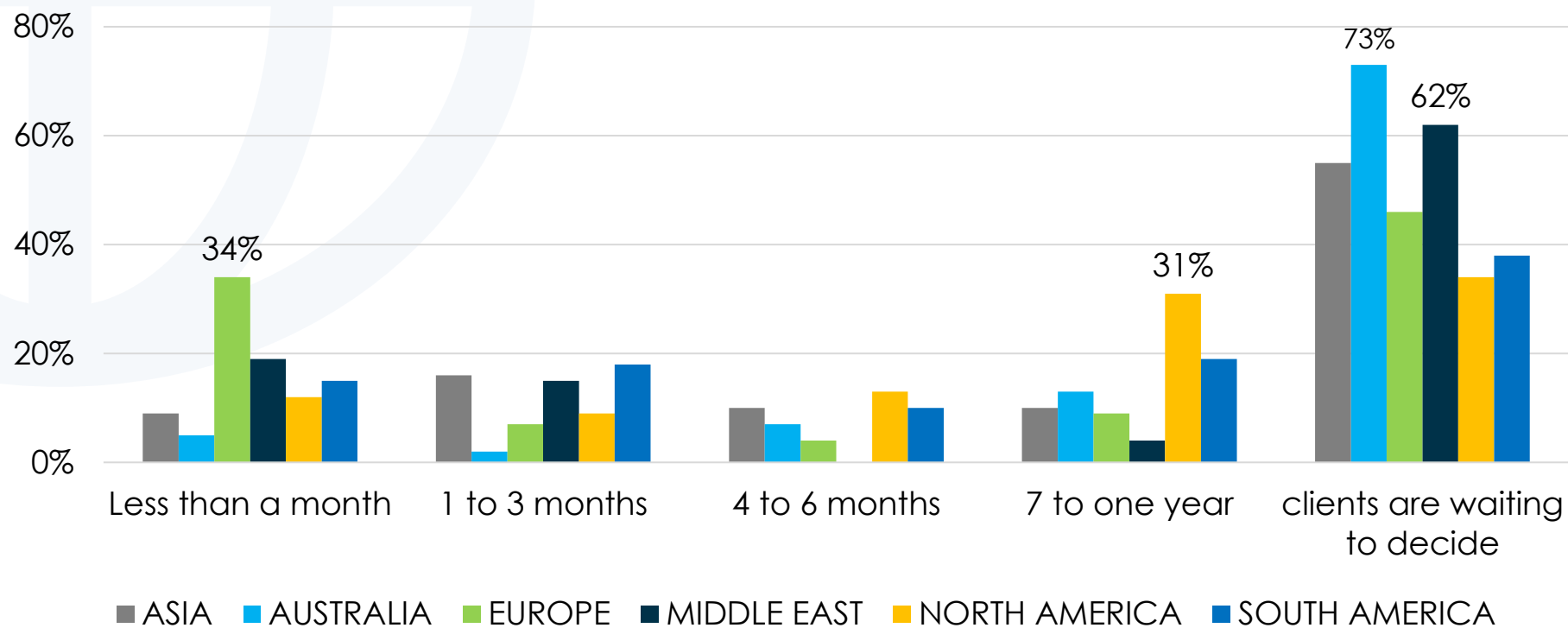
Globally, nearly 50% of clients are waiting to decide when to travel while 1/5 are booking an international trip less than a month in advance

Q12. How far in advance are your clients booking their international trips these days?



International advance booking by continent

Q12. How far in advance are your clients booking their international trips these days?



Health Control

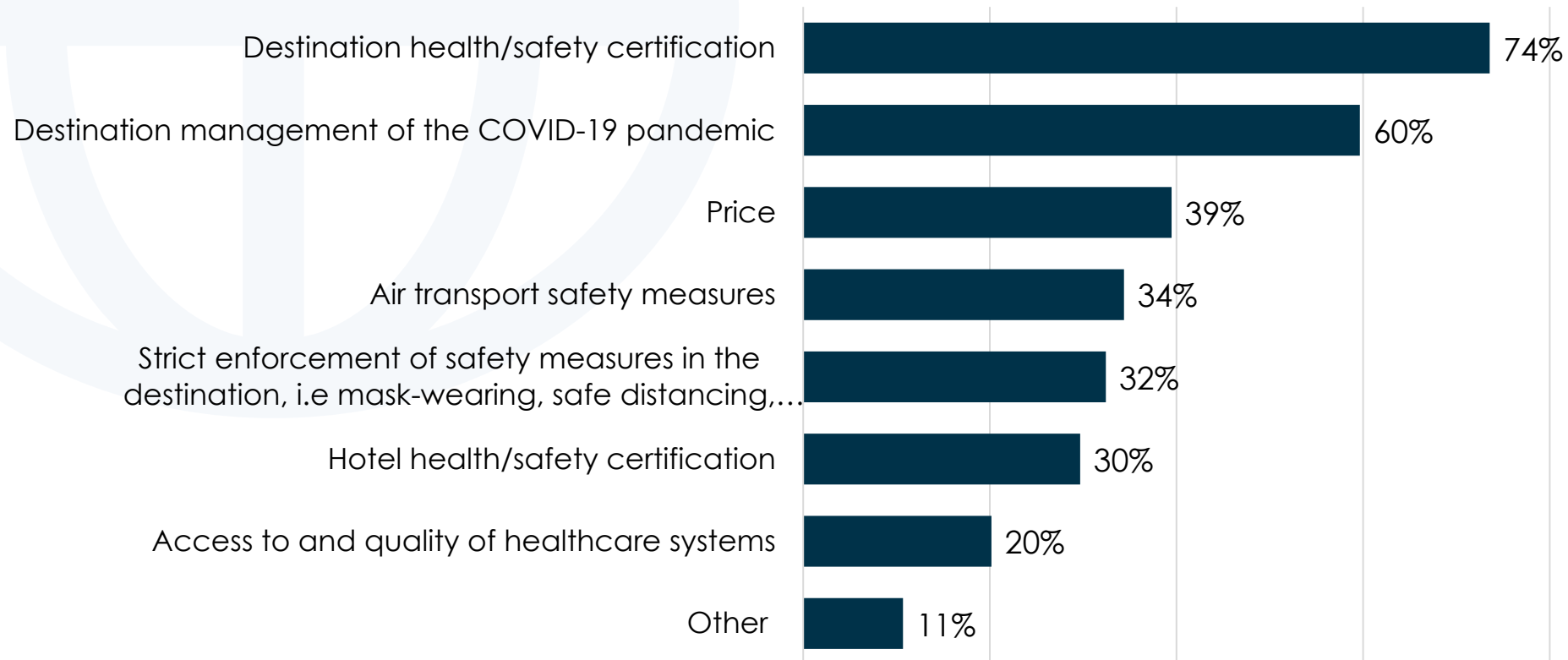
Temperature
Screening



Destination health and safety certification

Clients' #1 consideration when choosing a destination these days

Q13. What are your clients' TOP THREE considerations when choosing a destination today?



“OTHER” INCLUDE:

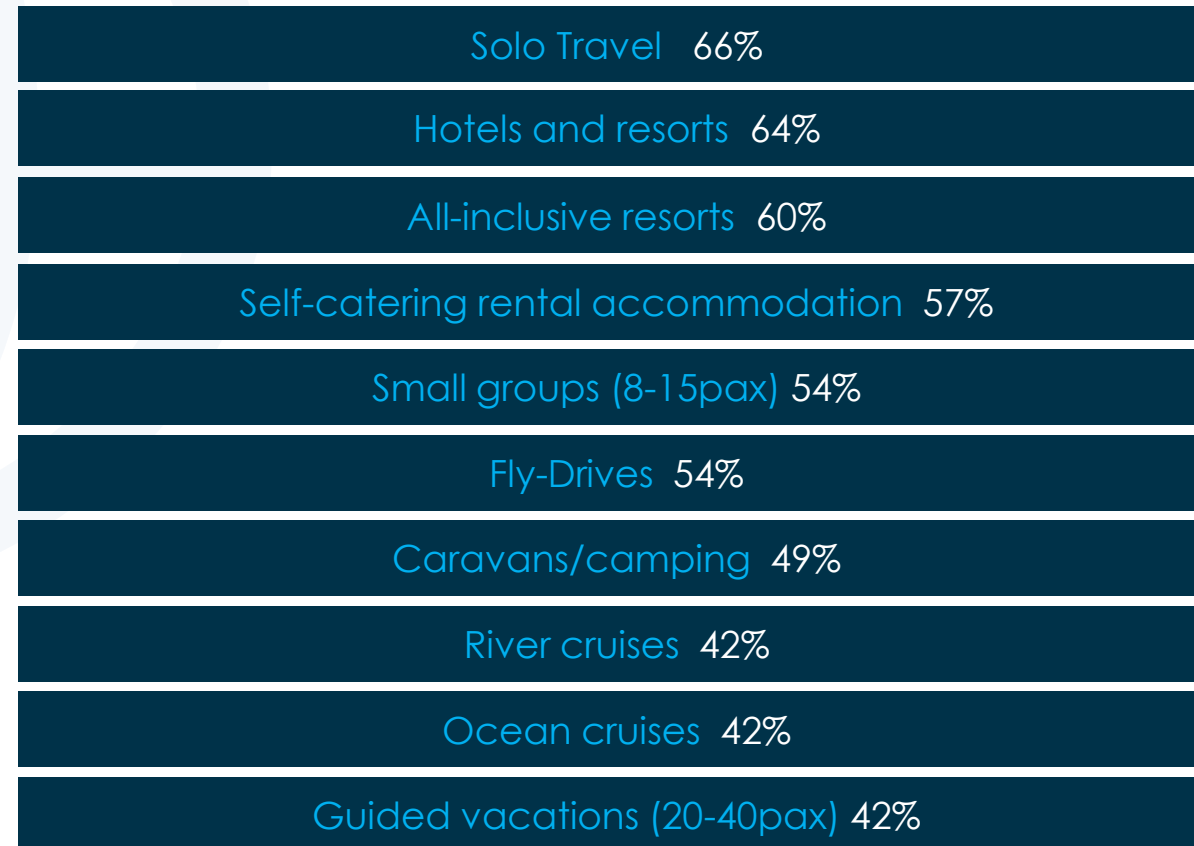
- Flexible cancellation policies
- Quarantine requirements and open borders
- Quarantine on return

66% of clients' interest is Solo Travel

Q15. What is the level of interest in the following products?

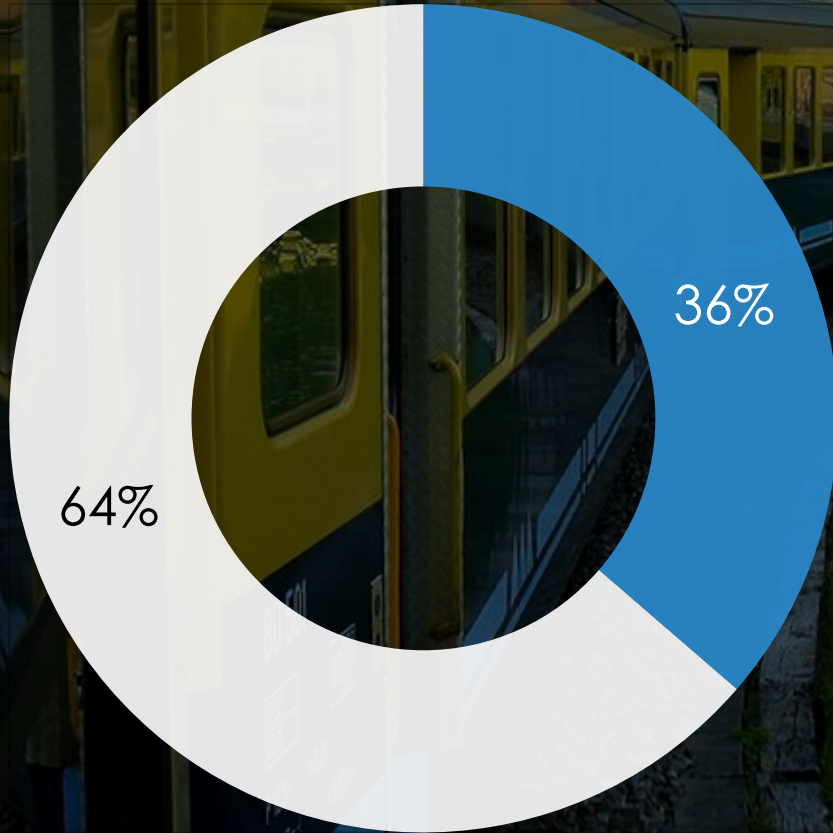
Global travellers' preferences

Q15. What is the level of interest in the following products?



The perception of the travel season is changing

Q17. Have travel seasons being stretched out?



- YES
Summer/winter season is being extended into fall/spring or longer
- NO
Travel seasons remain the same

45%

of distribution partners believe that suppliers' cancellation and flexibility policies are having a **positive impact on their businesses**

Q19. How much are suppliers' cancellation and flexibility policies impacting your business?



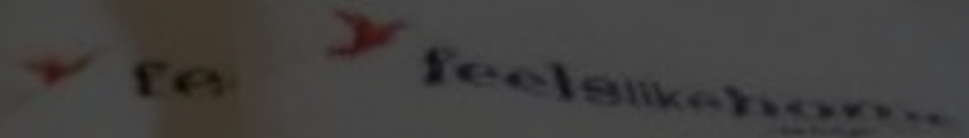


THREE MOST REQUESTED ACTIONS FROM DMOs

Global distribution partners have expressed the same needs in round I and II of the surveys

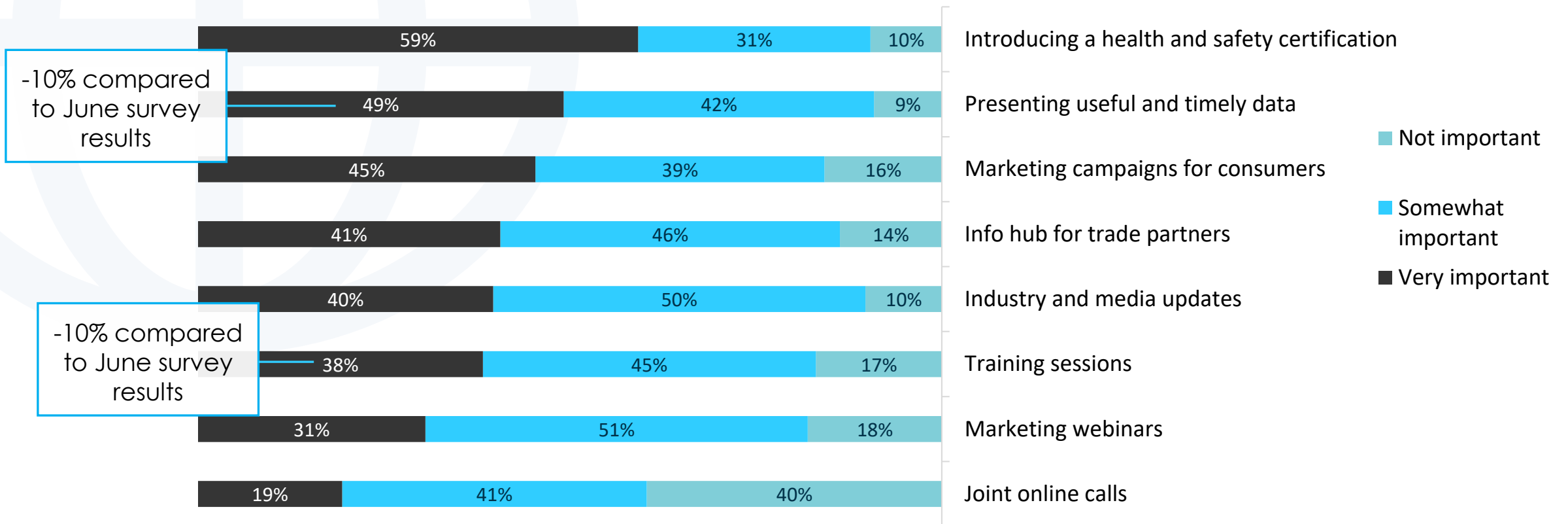
1. Introducing a health and safety certification
2. Presenting useful and timely data
3. Marketing campaigns for consumers

Q20. How important are the following actions that destination organizations can do to help you?

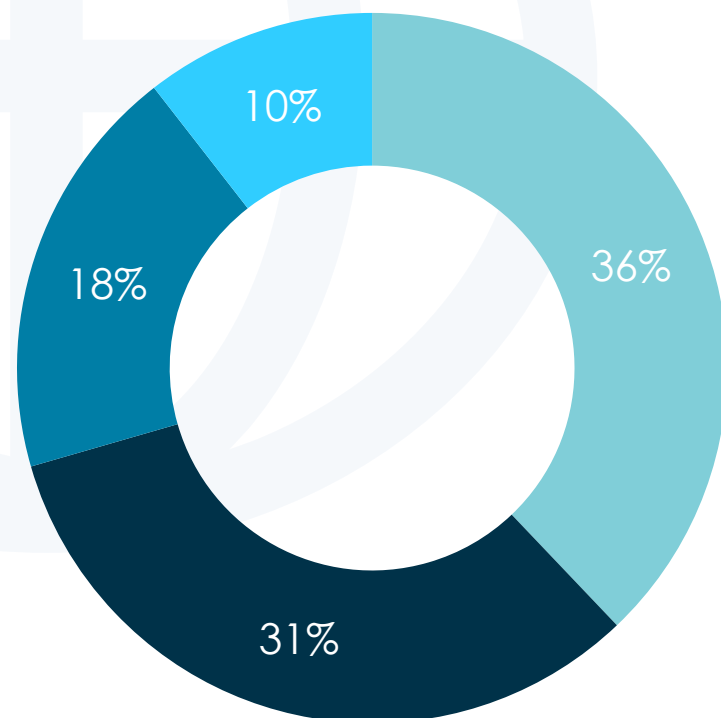


A further in depth look at the activities DMOs can do to support distribution partners in recovery

Q20. How important are the following actions that destination organizations can do to help you?



Q21. Which health/safety certification gives you more confidence?



- Destination certification
- International travel and tourism certifications
- International certification
- Hotel certification

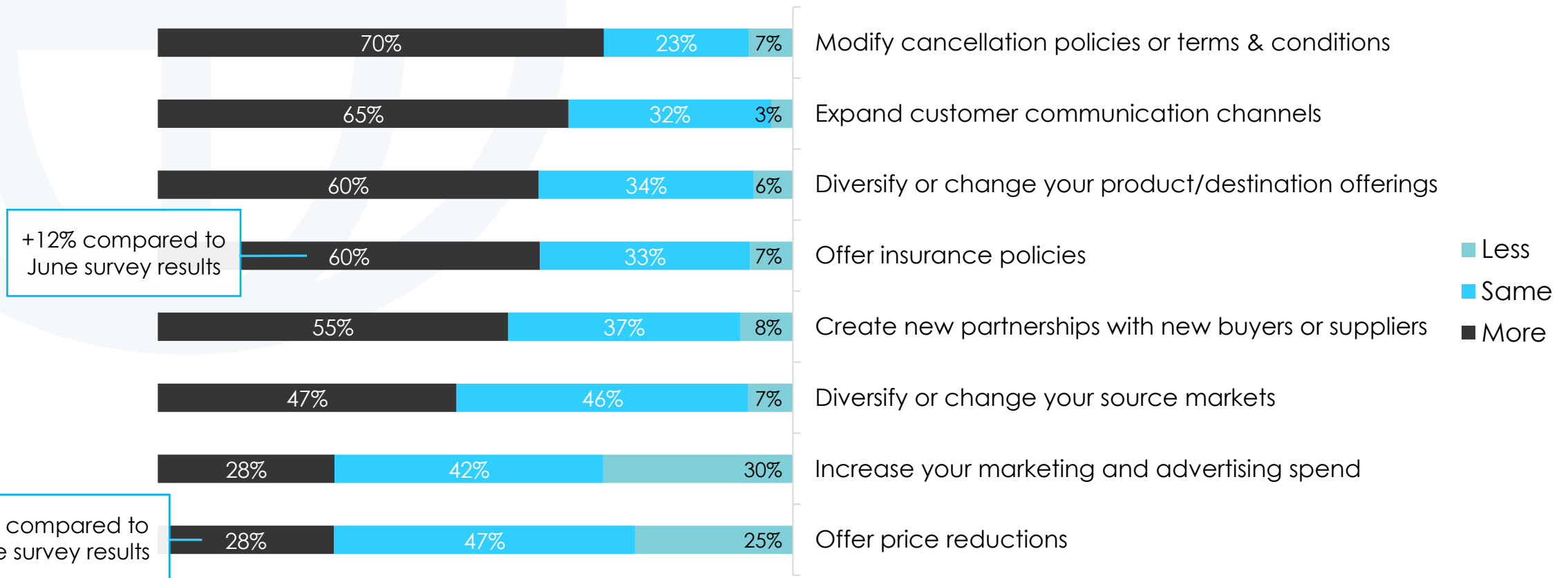




OUTLOOK

70% of the respondents believe that modifying cancellation policies or terms and conditions will be among their main undertakings in 2020-2021

Q25. Do you think you will be doing More, Same or Less in 2020-2021?





Globally, 44% of respondents are very likely to consider HOTELS & RESORTS not previously offered

Q26. Will you consider hotels & resorts you have never sold before?

-4% compared to June survey results

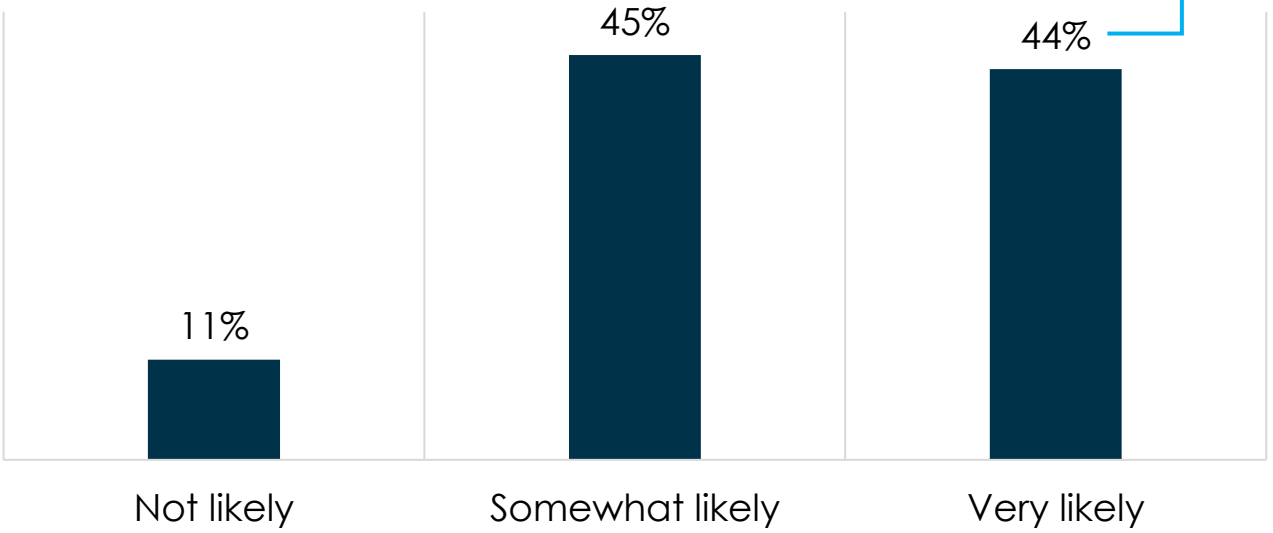
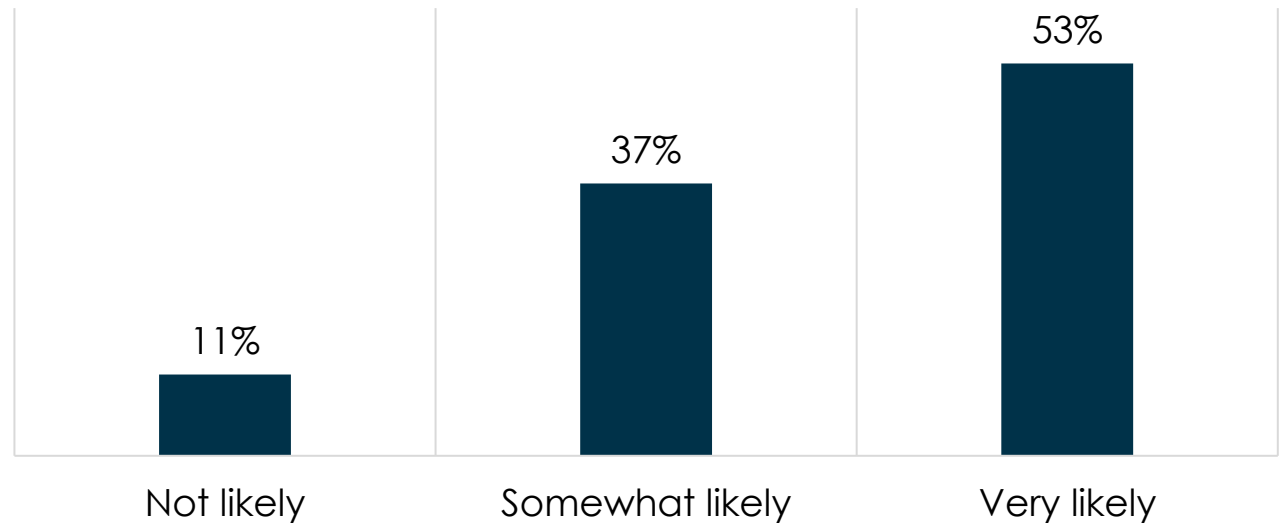


Photo credit: Shenzhen Marriott Hotel Golden Bay, China



Over 50% of respondents are very likely to contemplate DESTINATIONS not previously offered

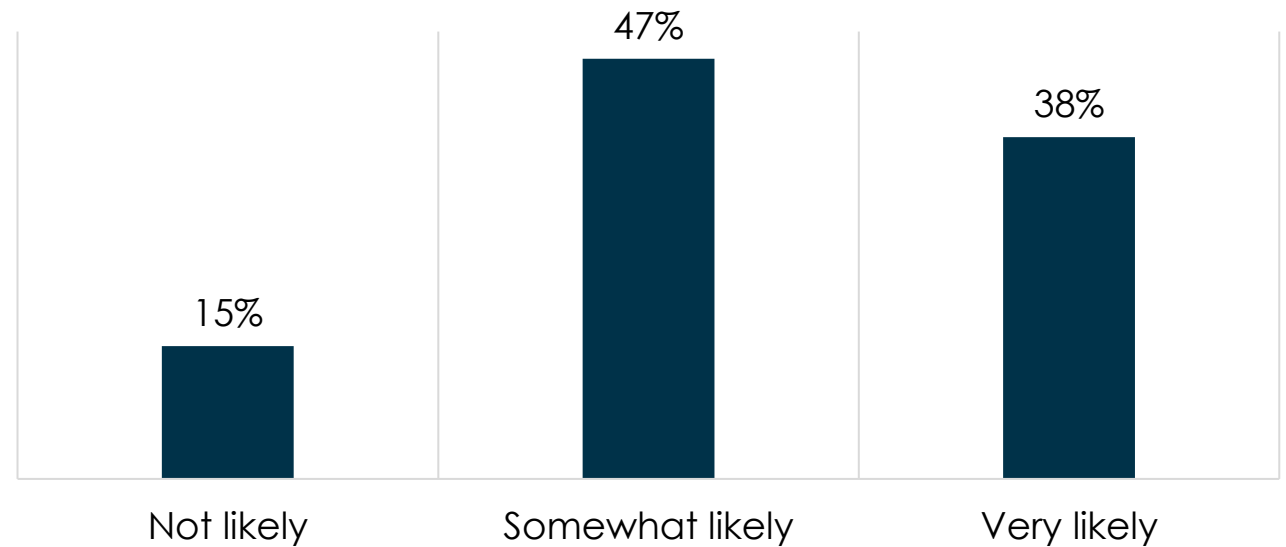
Q26. Will you consider destinations you have never offered before?





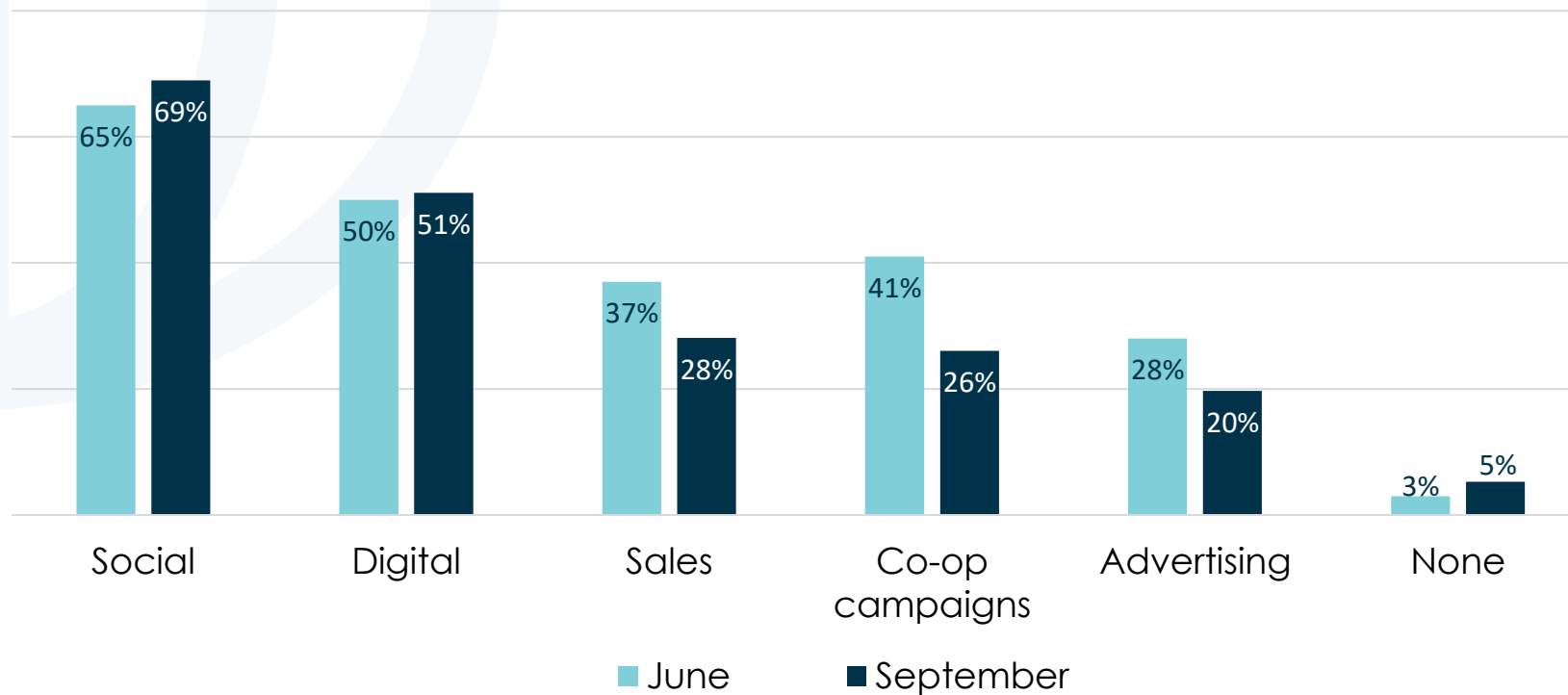
Globally, nearly 40% of respondents are very likely to consider new SUPPLIERS

Q26. Will you consider suppliers you have never worked with before?



Social media continues to be the no. 1 marketing activity planned for the coming months

Q27. Which marketing activities do you plan for the coming months?



Changing roles

Q28. How do you think your role will change going forward into 2021 and beyond?

ANSWERED: 635 SKIPPED: 386

Round I, June 2020



Round II, September 2020



Travel Consul

Travel Consul is an international travel marketing alliance consisting of (18) advertising, media, public relations and marketing firms spread across six different continents – all specializing in travel.

With over 600 clients in the travel and tourism sector, our global team of more than 850 experts work seamlessly to implement global strategies with unique hands-on local market knowledge and industry relationships. From B2B to B2C, Travel Consul helps government and commercial organizations.

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