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# GLOBAL TRAVEL DISTRIBUTION COVID-19 IMPACT

FEBRUARY 2021 EDITION



## Travel Consul

Travel Consul is a network of the 18 best-in-class communications and marketing agencies worldwide that focus exclusively on travel, tourism and hospitality.

With experts in 44 countries, we deliver invaluable local insights and guidance on multimarket projects.



EUROPEAN  
TRAVEL  
COMMISSION  
ASSOCIATE MEMBER



PATA<sup>®</sup>  
Pacific Asia Travel Association  
MEMBER

## Reaching Today's Decision-Makers

B2B AND B2C TARGET AUDIENCES + INFLUENTIAL MEDIA + VALUABLE STAKEHOLDERS

AGENCIES

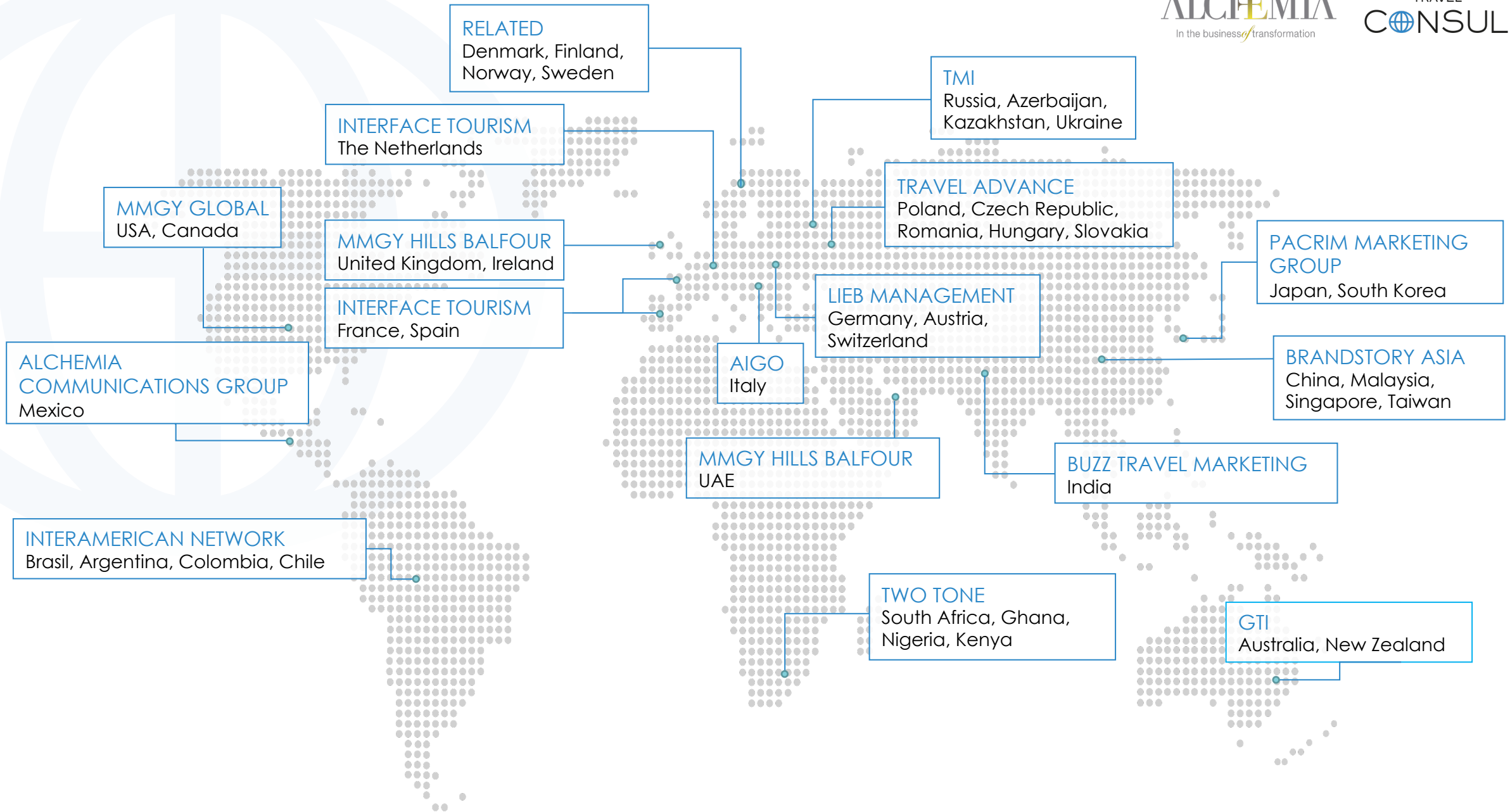
18

COUNTRIES

44

CONTINENTS

6



# Global Services For Global Clients



# Some Clients Working with Travel Consul Agencies in Multiple Markets



## The Survey

Travel Consul launched its third 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 late January to early February 2021 and gathered **1,292 complete responses** from travel executives (tour operators and agency owners) across twenty outbound travel markets.

The first survey took place in June 2020 and the second in October 2020. These results are used in this report to compare and track progress.

20+ SOURCE MARKETS

11 LANGUAGES

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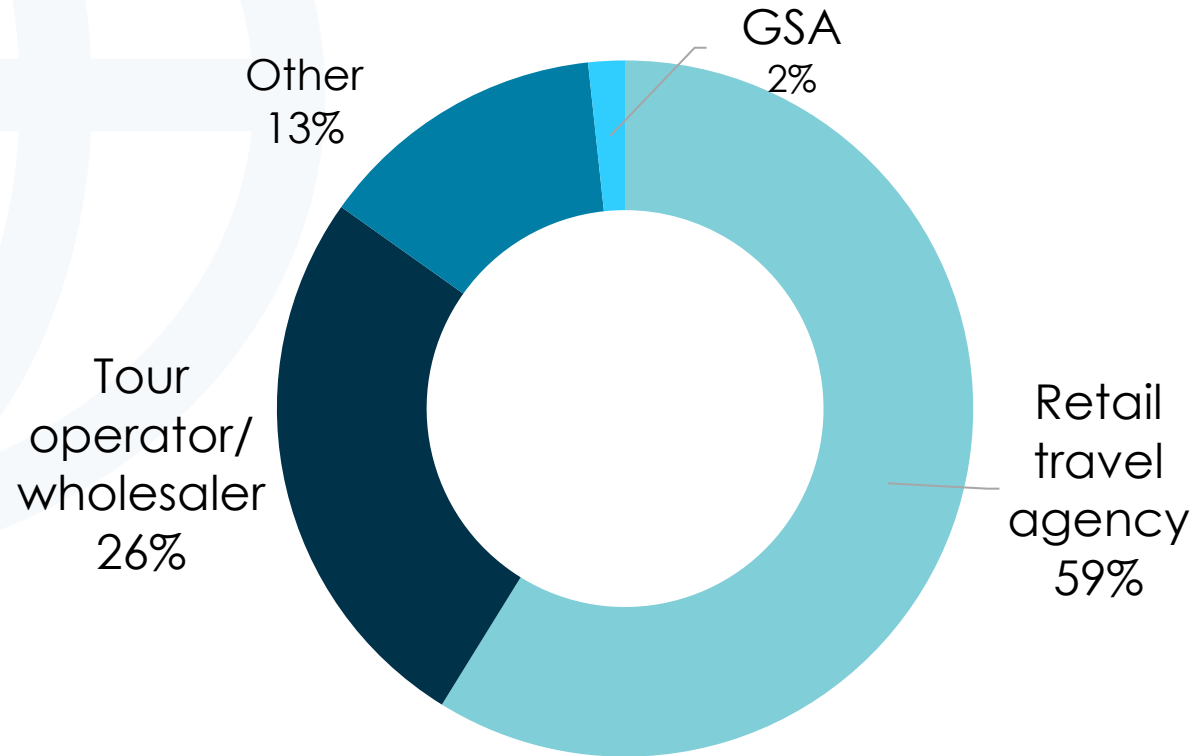
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# Respondents by Company Type

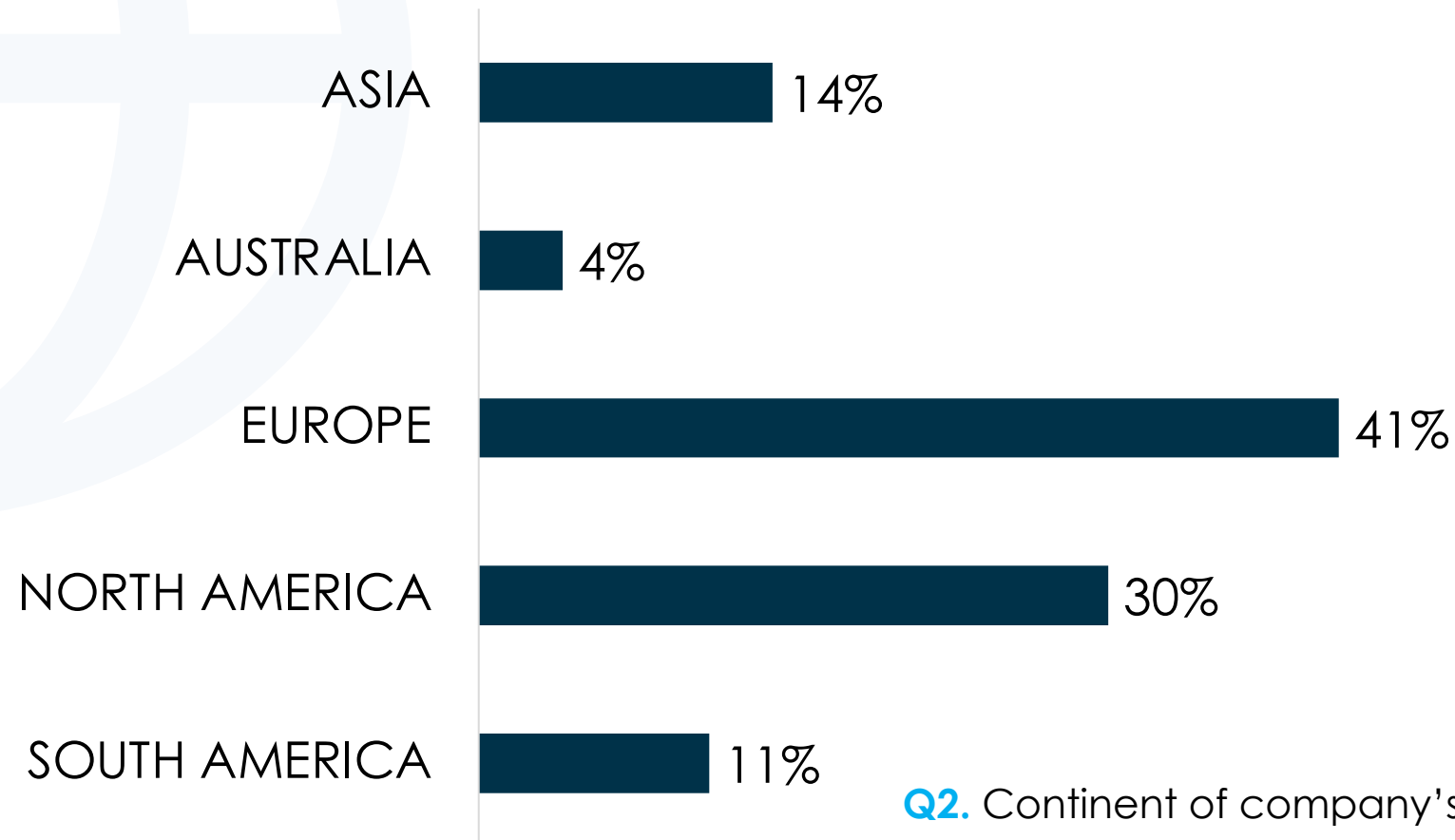
1,292 COMPLETE RESPONSES



Q1. Respondents by company type

## Respondents by Continent of Main Operation

1,292 COMPLETE RESPONSES



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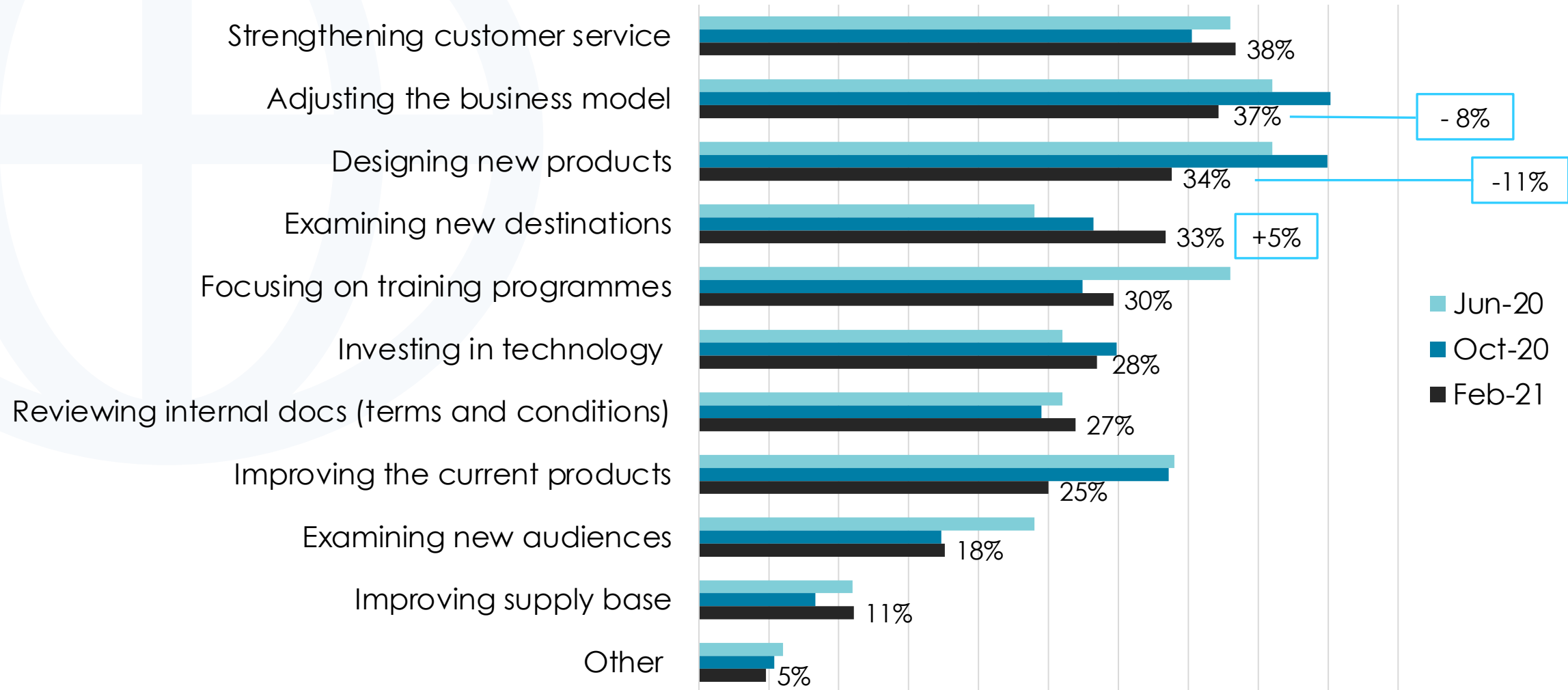
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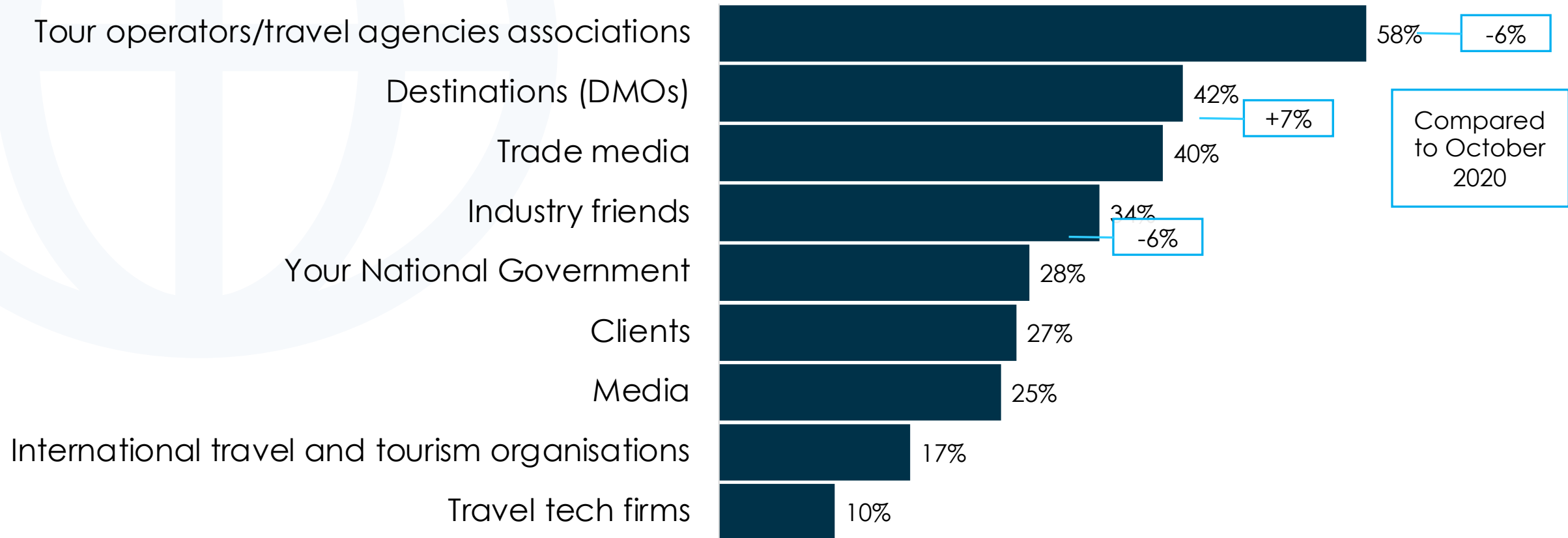
# RESPONSE TO COVID-19

## Searching New Destinations Records a Consistent 5% Increase



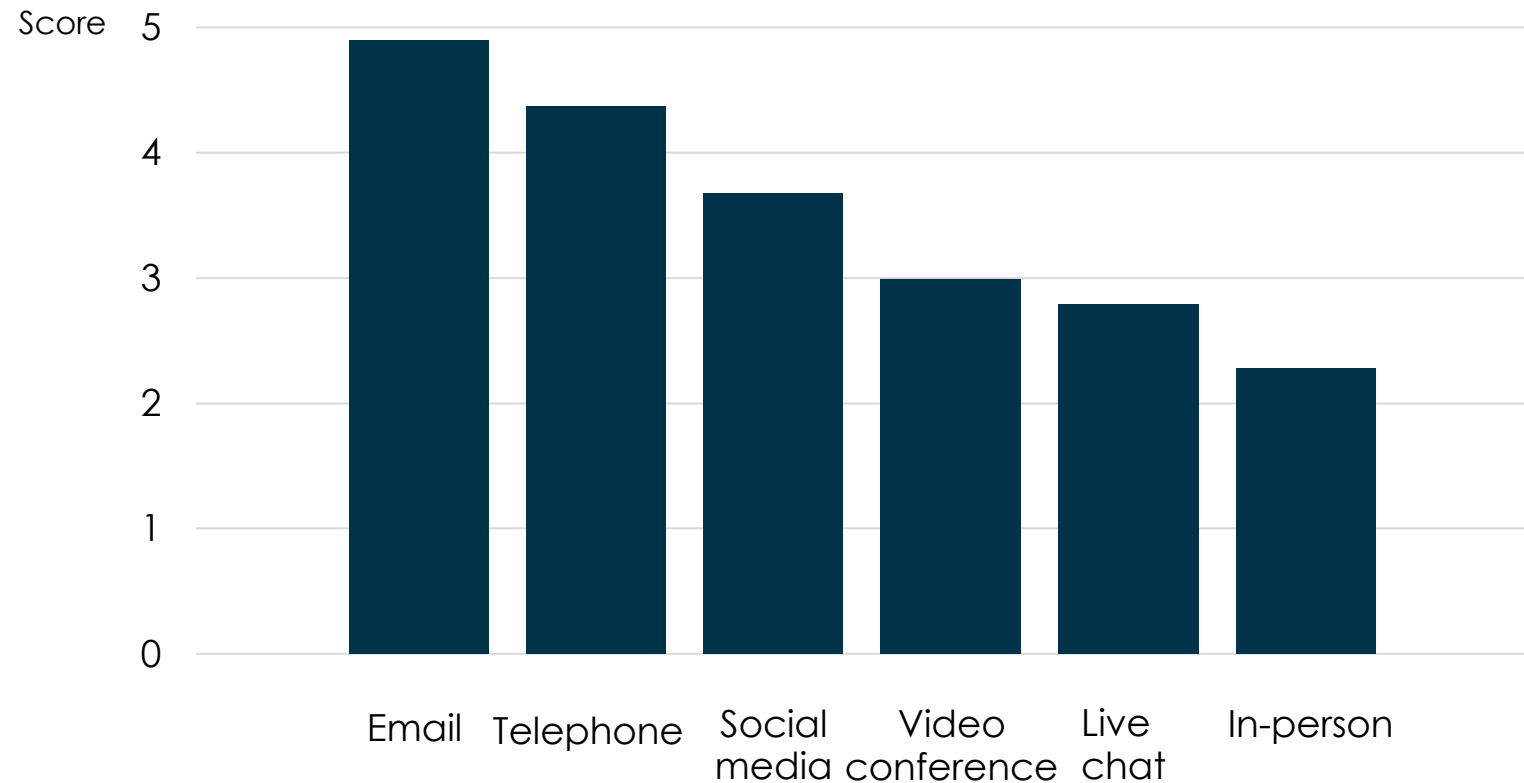
Q3. What TOP THREE measures has your company implemented during the last three months?

## Travel Associations Remain the Primary Data Sources During the Crisis



**Q4.** 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



**Q5.** Which channels are you using to interact with your clients these days? Please rank by order of relevance

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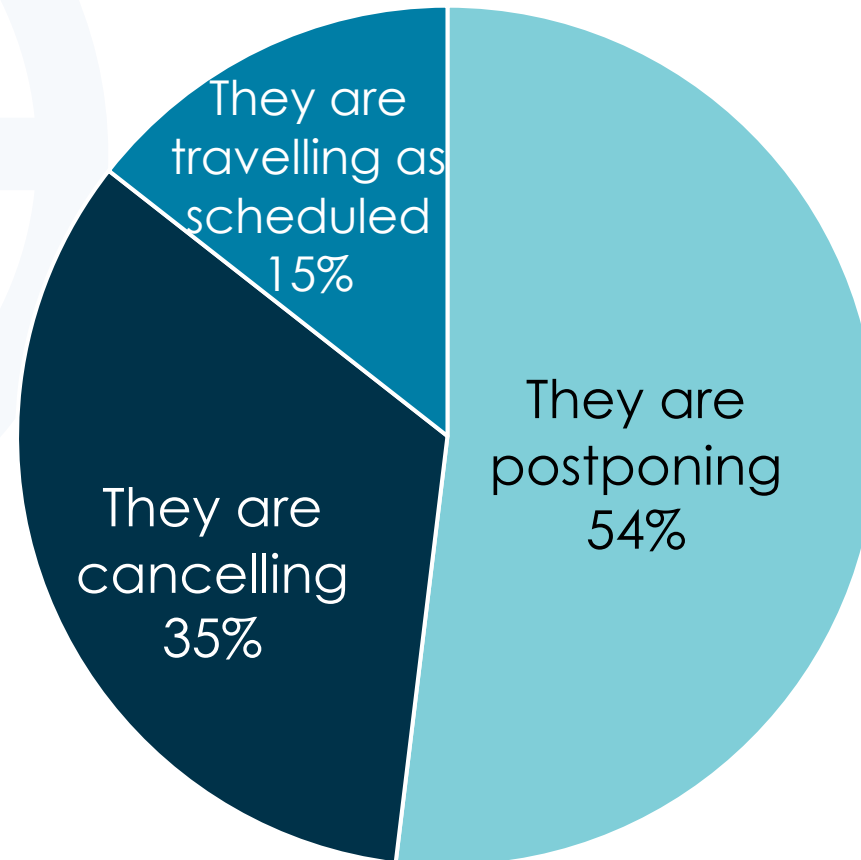
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# CHANGES AHEAD



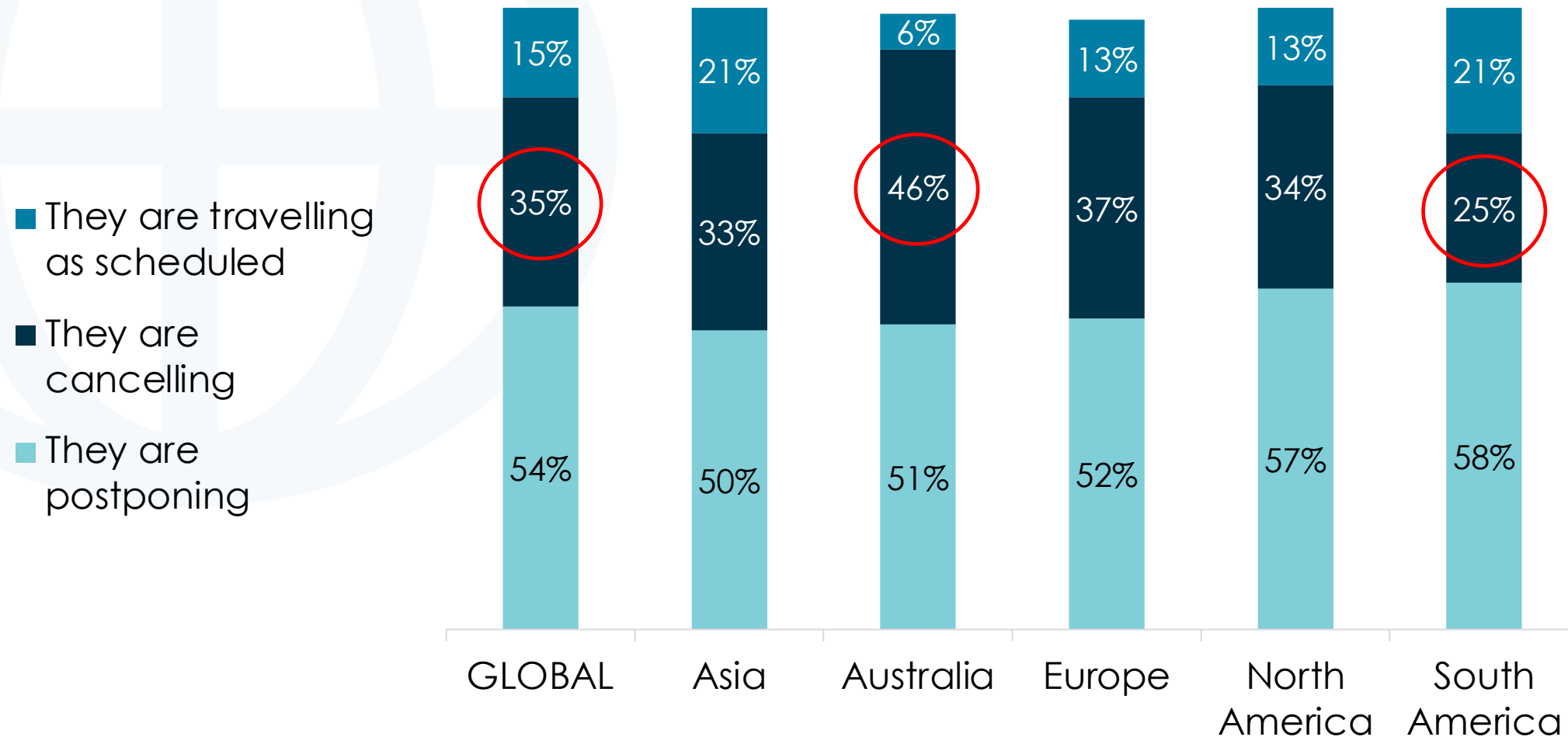
## Globally, Over Half Are Postponing Their Trips



Q6. What percentage of your clients are postponing, cancelling or travelling as scheduled these days?

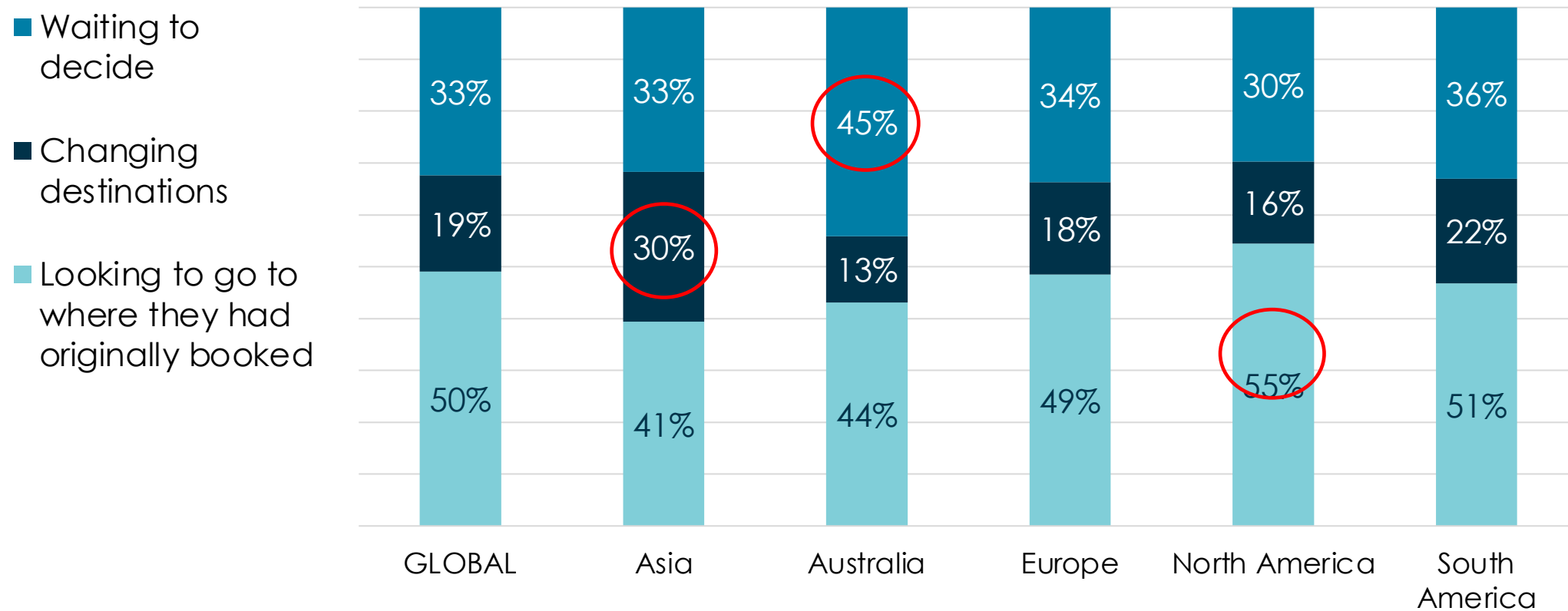


## Significant Differences Per Continent



Q6. What percentage of your clients are postponing, cancelling or travelling as scheduled these days?

## Globally, of those postponing, 50% are looking to go where they had originally booked



**Q6.1** Of those clients who are postponing, what percentage (%) are...

## Confidence Shows Rescheduling in Q3 2021

11% ~ Q2 2021

24% ~ Q3 2021

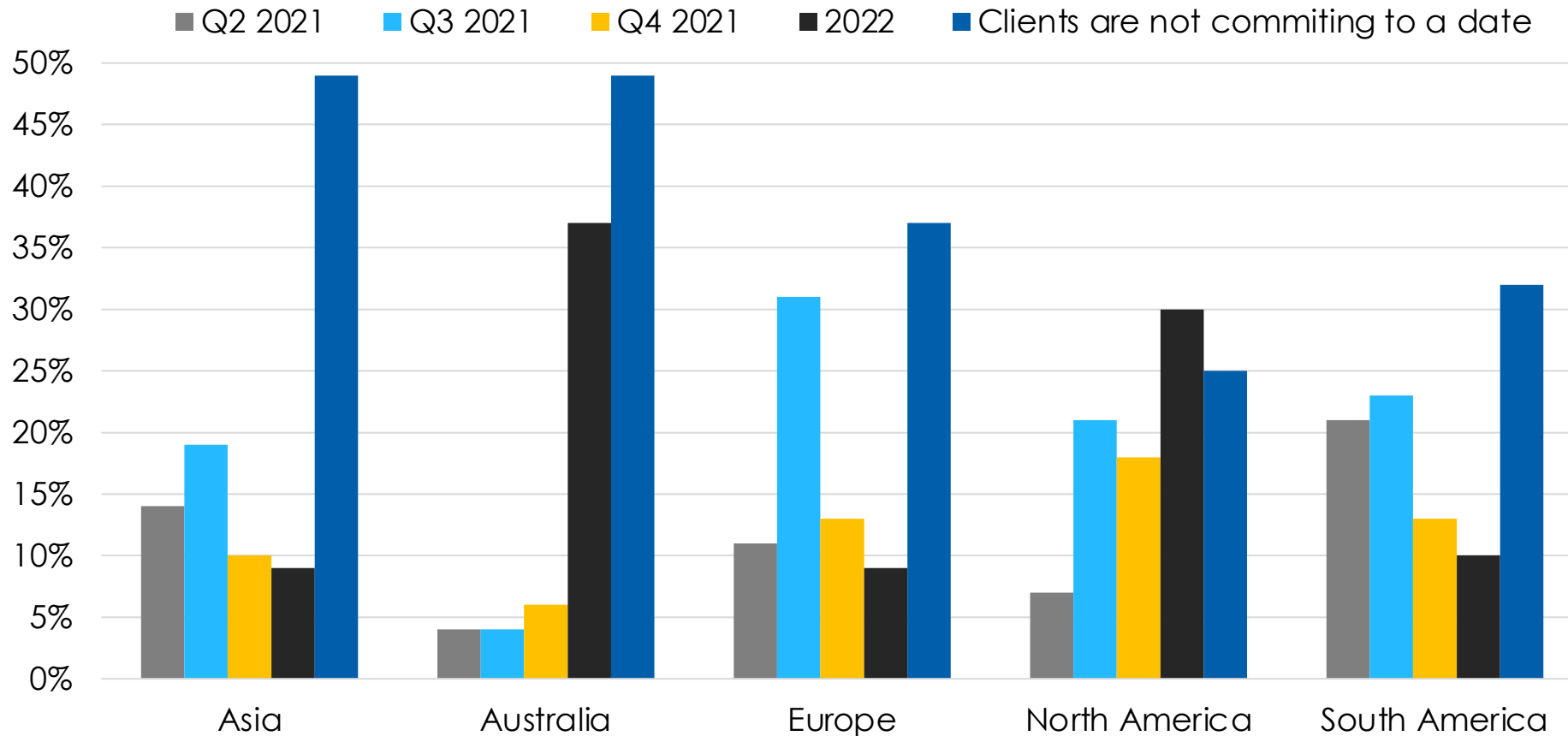
14% ~ Q4 2021

16% ~ 2022

35% ~ Clients are not committing to a date

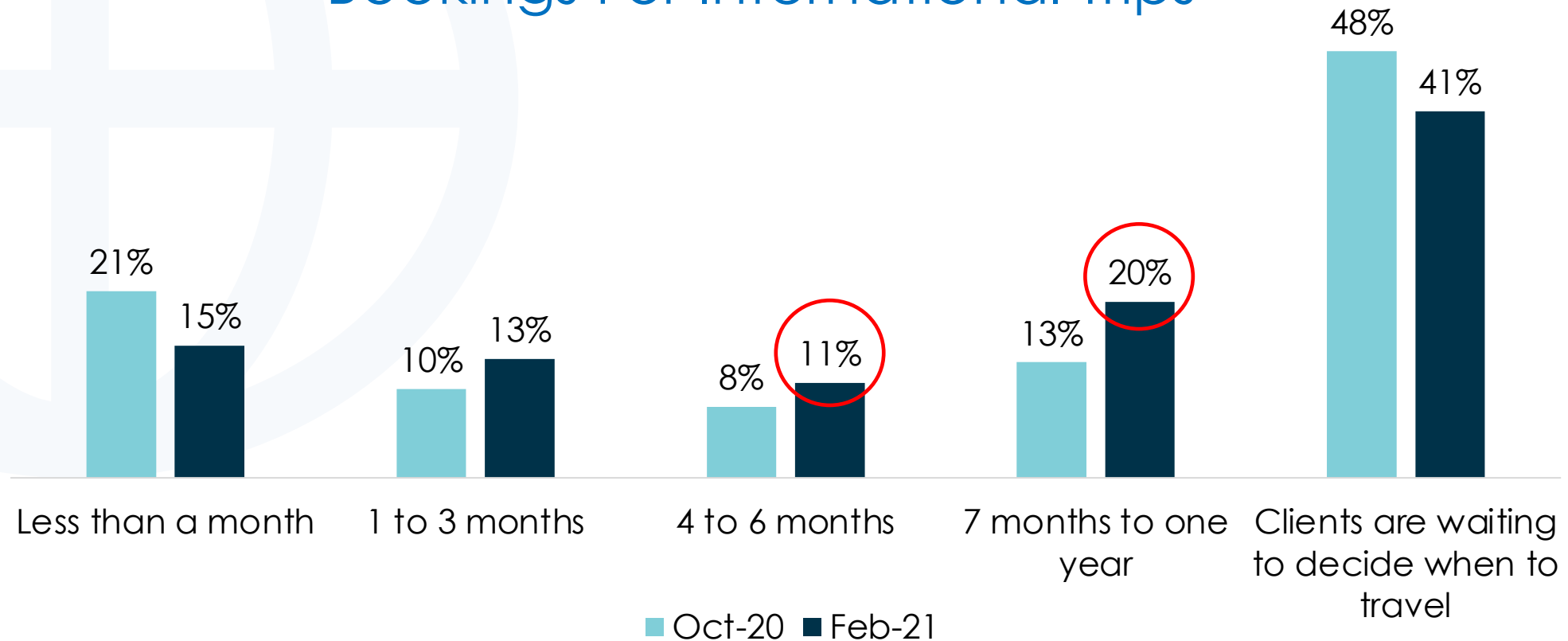
**Q6.2** Of those clients who are postponing, in which one period are they rebooking the most?

## 31% Of Europeans Expect A More Positive Outlook By Rescheduling To Q3 2021



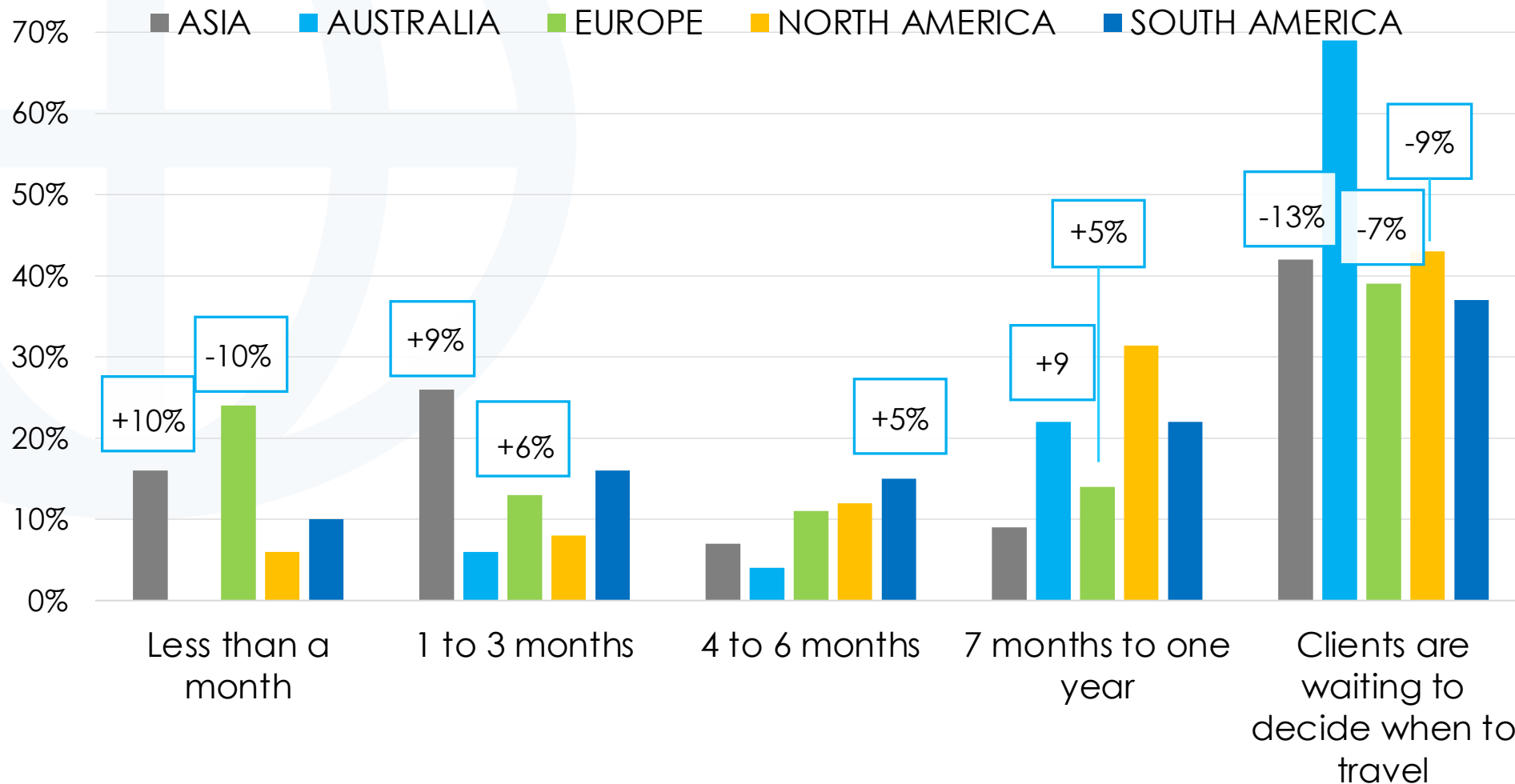
**Q6.2** Of those clients who are postponing, in which one period are they rebooking the most?

## A Positive 7% Increase In New Advance Bookings For International Trips



**Q9.** Of those clients making new bookings for international trips, how far in advance are they booking?

## Advance New International Bookings Differ By Continent



Q9. Of those clients making new bookings for international trips, how far in advance are they booking?

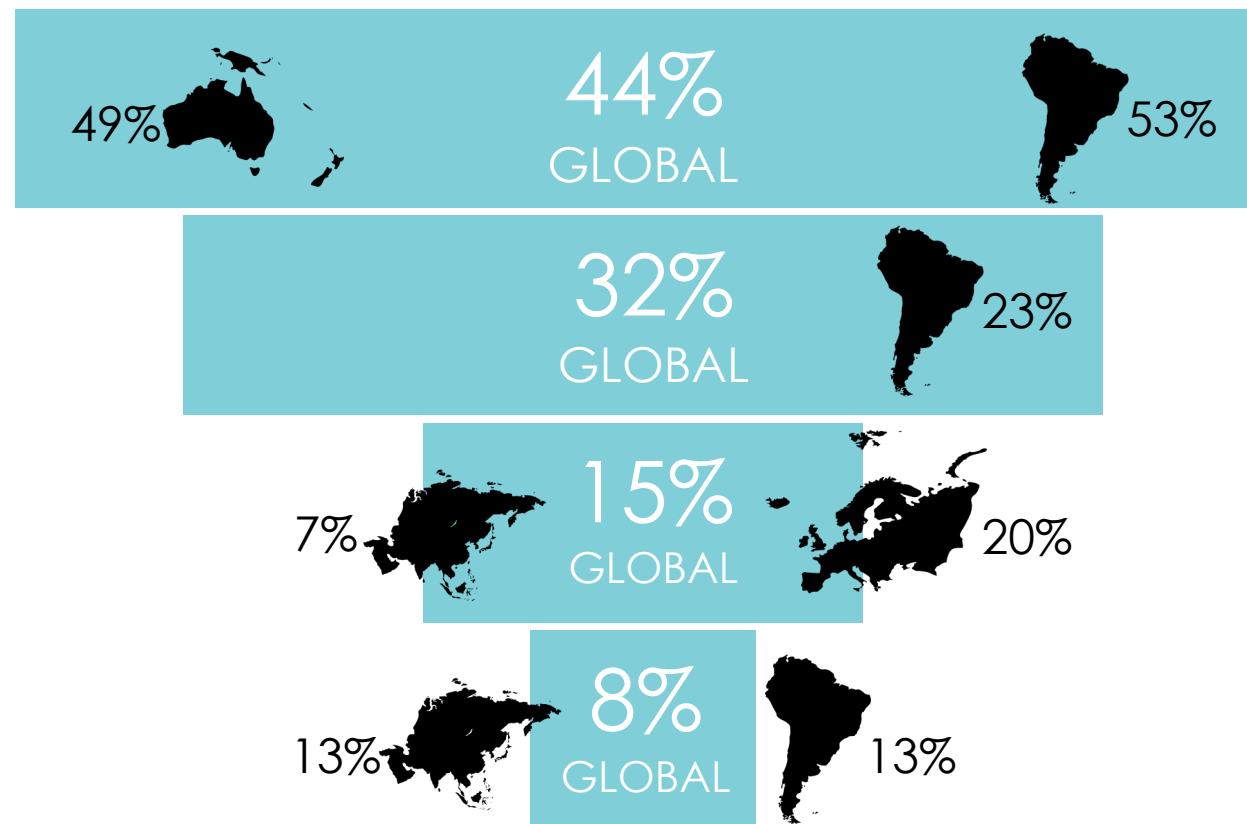
# Widespread Vaccinations Will Stimulate Bookings

We expect a higher no. of bookings only when vaccines are widely administered

Other factors (e.g. destination health certificate, reducing quarantine, free covid-19 test) will have more impact

Our clients have not changed their booking patterns yet

We are already seeing higher bookings with the news that a vaccine is on the way



**Q7.** How do you think that COVID-19 vaccine will have an impact on your international bookings during 2021?

Immunity passport  
or e-vaccination  
certificate might  
be required from  
some destinations  
and suppliers (e.g.  
airlines) before  
international travel

66%

of distribution partners  
see this having a  
**positive impact on  
their 2021 bookings**

**Q8.** Do you see this having a positive or  
negative effect on your 2021 bookings?



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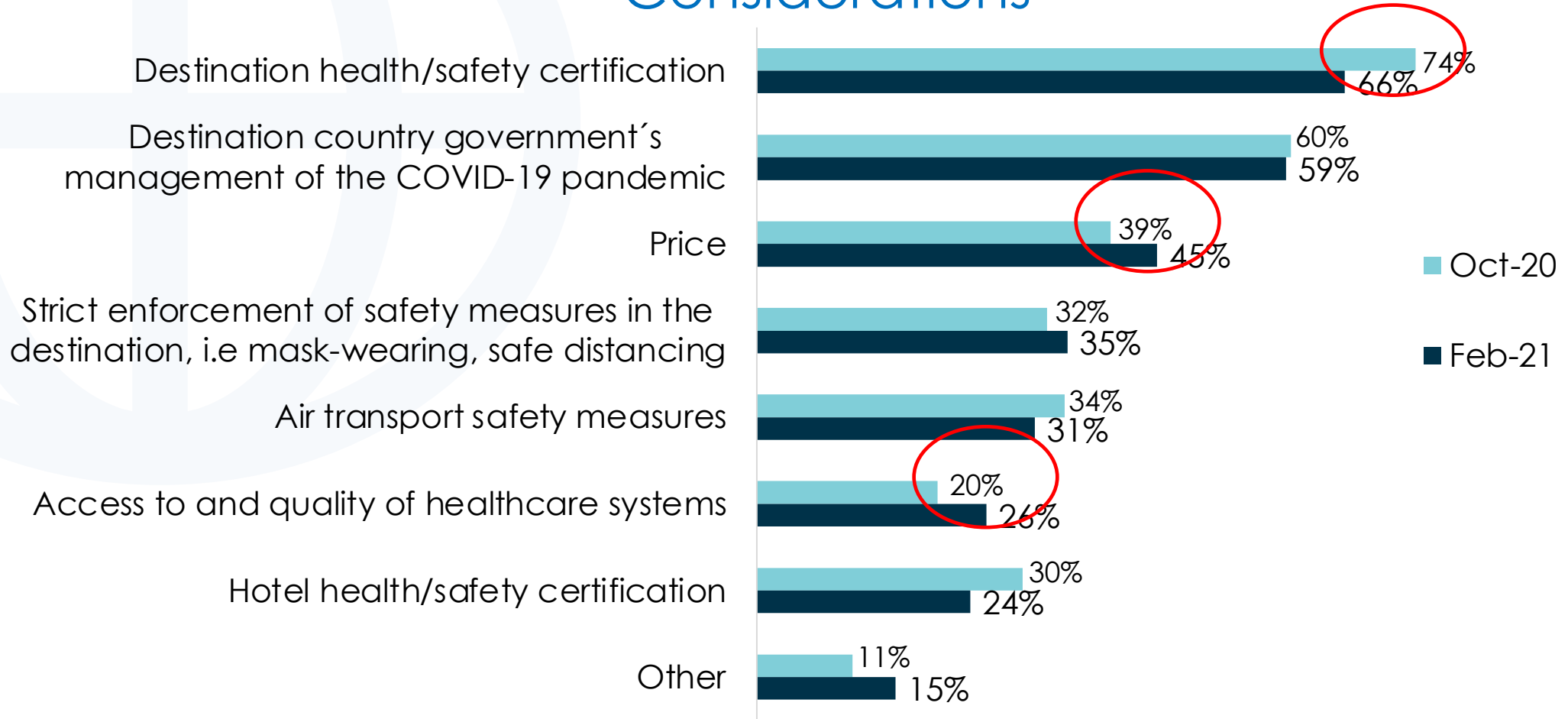
Temperature  
Screening



Clients' #1 consideration when  
choosing a destination these days...

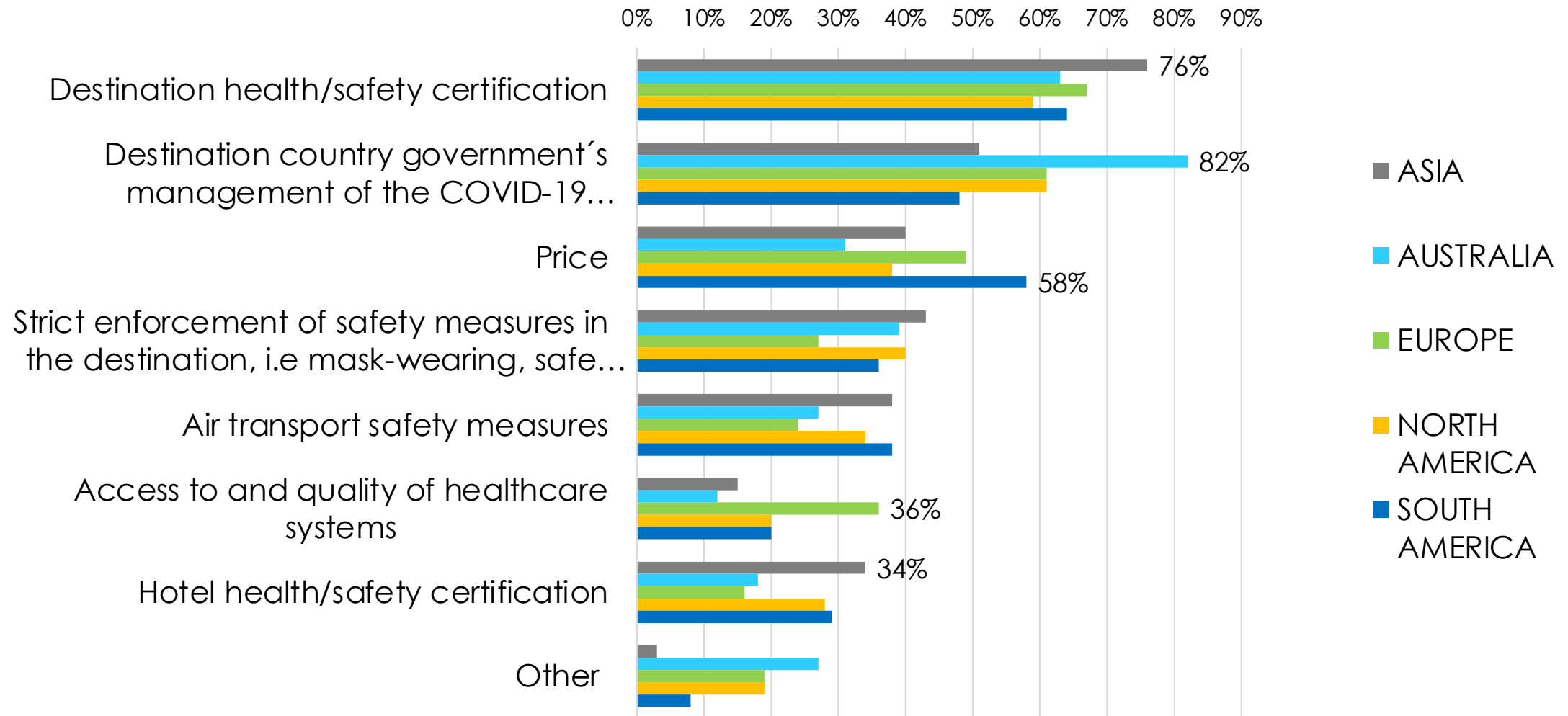
Destination Health And Safety  
Certification

## Price & Access To Healthcare Systems Are Growing Client Considerations



**Q10.** What are your clients' TOP THREE considerations when choosing a destination today?

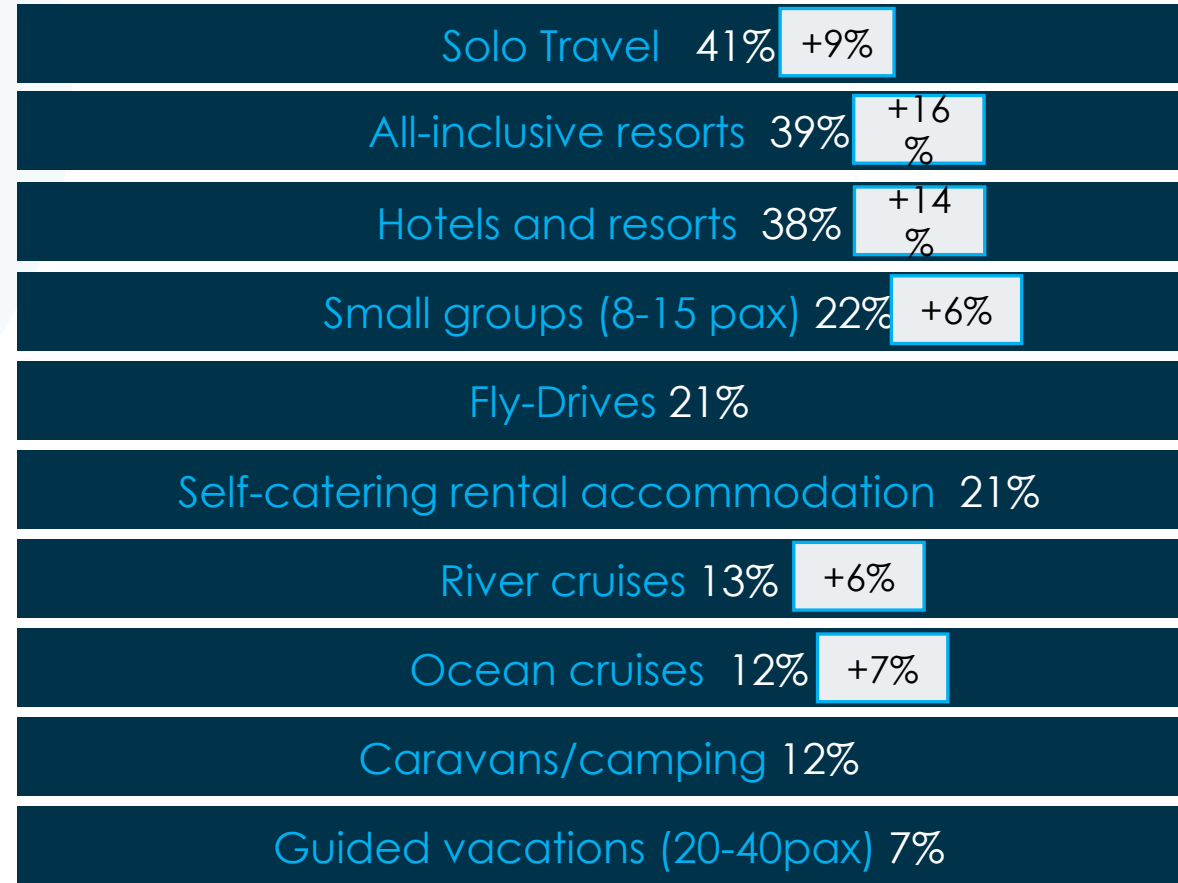
# A Continental Comparison



**Q10.** What are your clients' TOP THREE considerations when choosing a destination today?

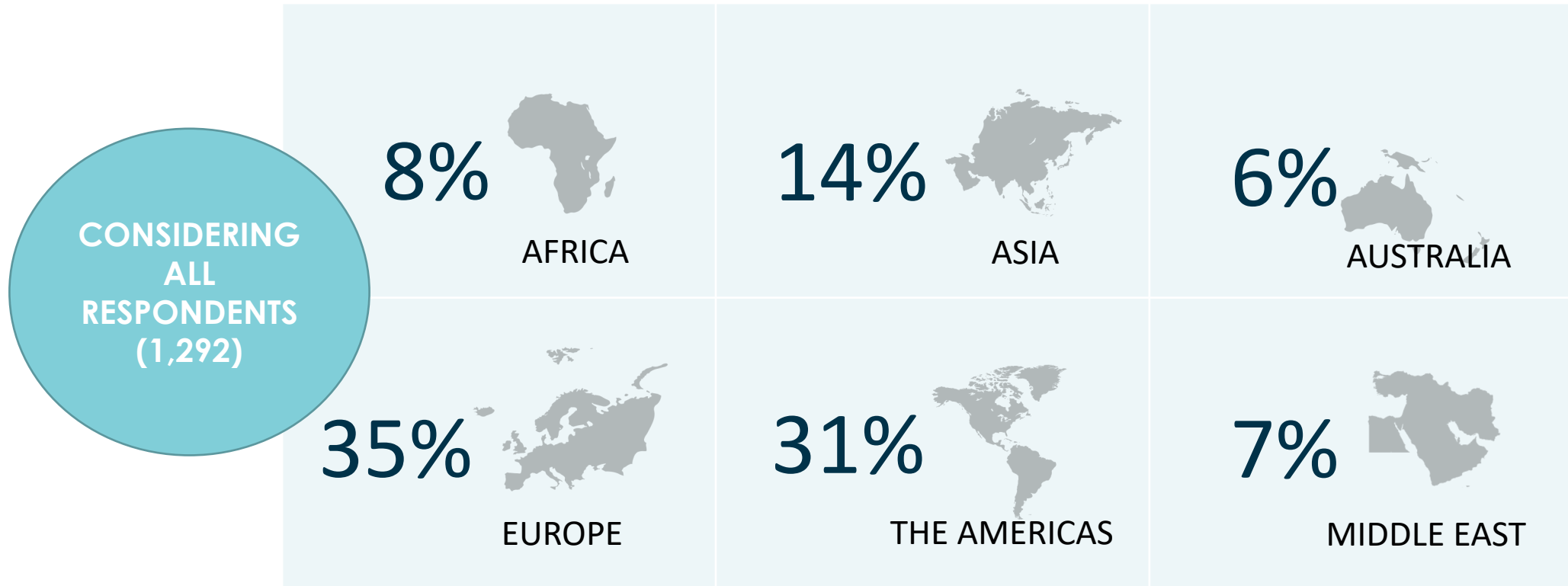
## A High Level Of Client Interest Remains In Solo Travel, All-inclusive Resorts And Hotels & Resorts

**HIGH  
INTEREST**



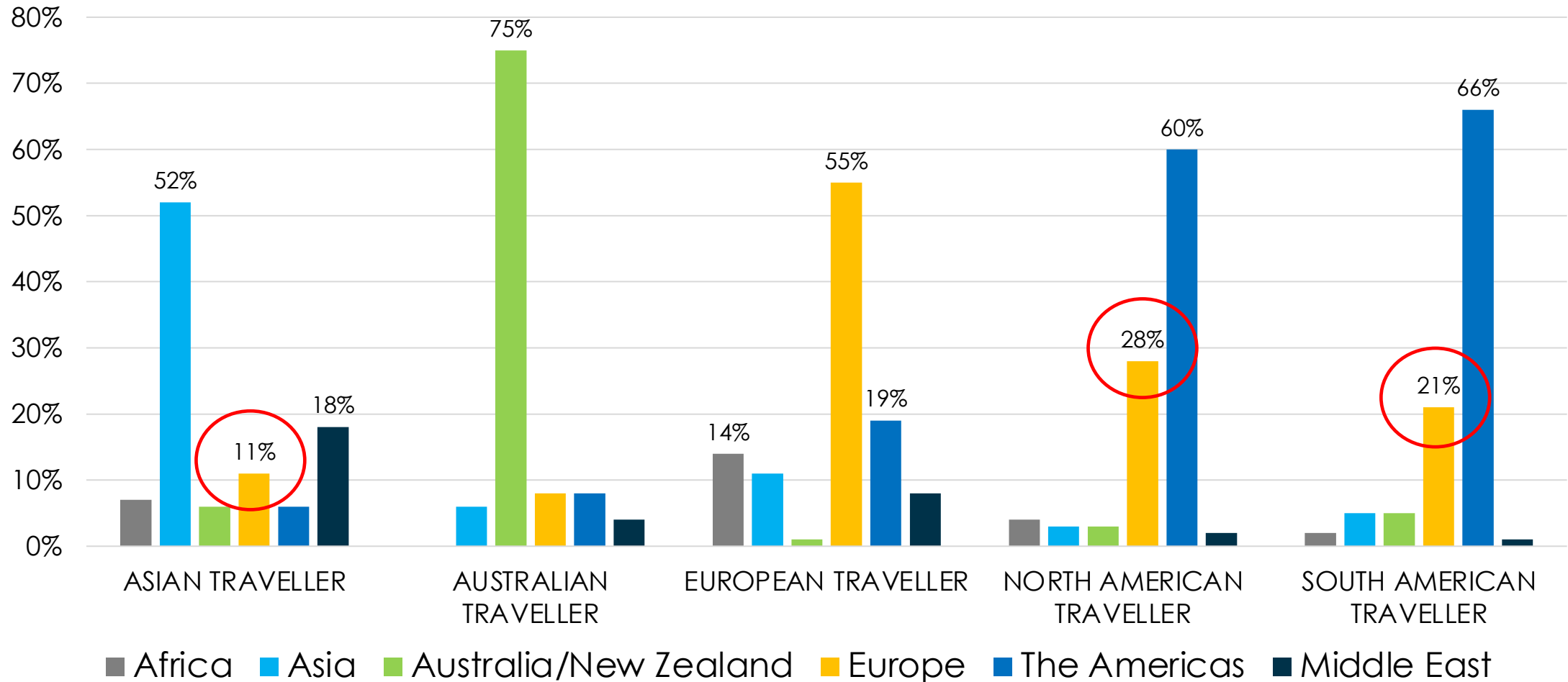
**Q11.** What is the level of interest in the following products (low, medium or high)?

## Favourite Continent/Region To Travel In 2021



**Q12.** What TOP ONE region/continent are your clients considering the most to travel in 2021?

## Travelling Within One's Own Continent Is The Preferred



**Q12.** What TOP ONE region/continent are your clients considering the most to travel in 2021?



## SOUTHERN EUROPE

Top 1 region selected by **64%** of clients who are considering EUROPE to travel in 2021

Western Europe	Northern Europe	Central Eastern Europe
<b>18%</b>	<b>13%</b>	<b>6%</b>

**Q12.1** Which region in EUROPE are your clients considering the most to travel in 2021? Answered: 455



## SOUTH ASIA

Top 1 region selected by **44%** of clients who are considering ASIA to travel in 2021

Eastern  
Asia  
**32%**

South  
East Asia  
**24%**

**Q12.1** Which region in ASIA are your clients considering the most to travel in 2021? Answered: 177





# NORTH AMERICA

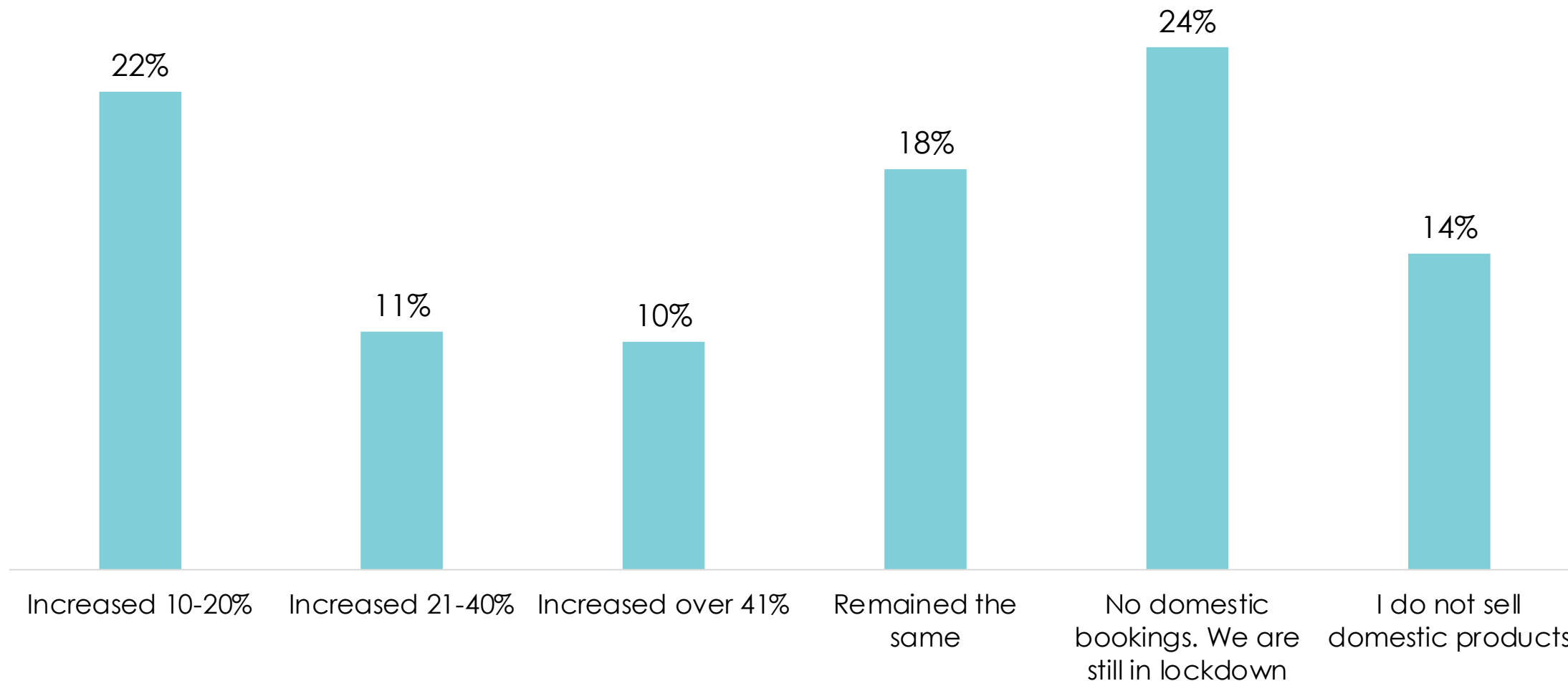
Top 1 region selected by **78%** of clients who are considering THE AMERICAS to travel in 2021

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South America	Central America
<b>14%</b>	<b>8%</b>

**Q12.1** Which region in THE AMERICAS are your clients considering the most to travel in 2021? Answered: 395

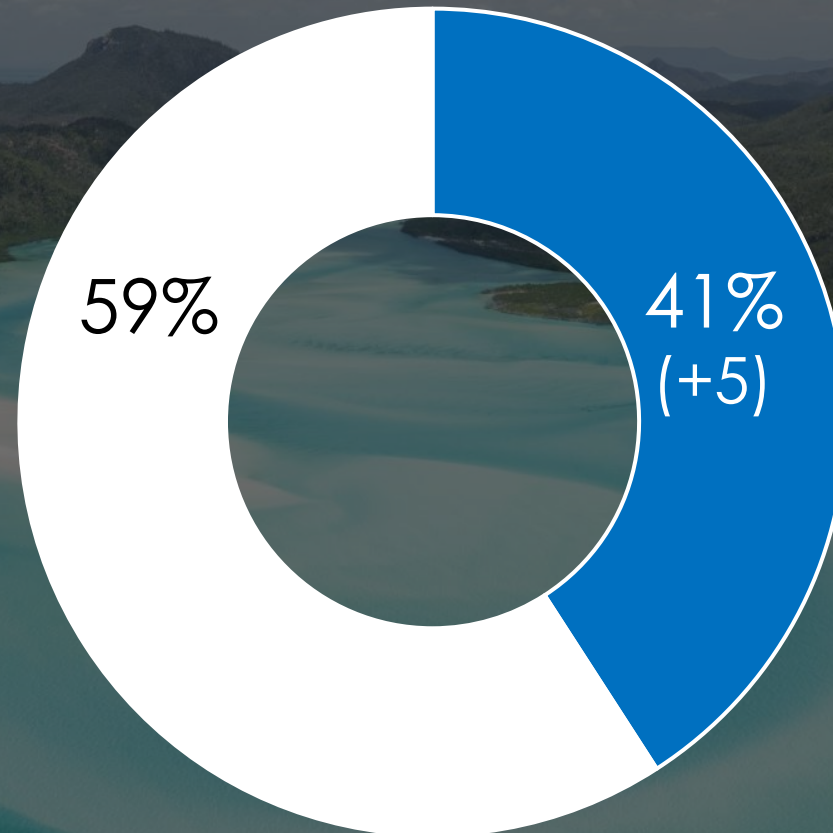
## 43% Increase In Domestic Travel



**Q14.** Has your domestic trip business increased or remained the same during the last three months?

## The perception of the travel season is changing

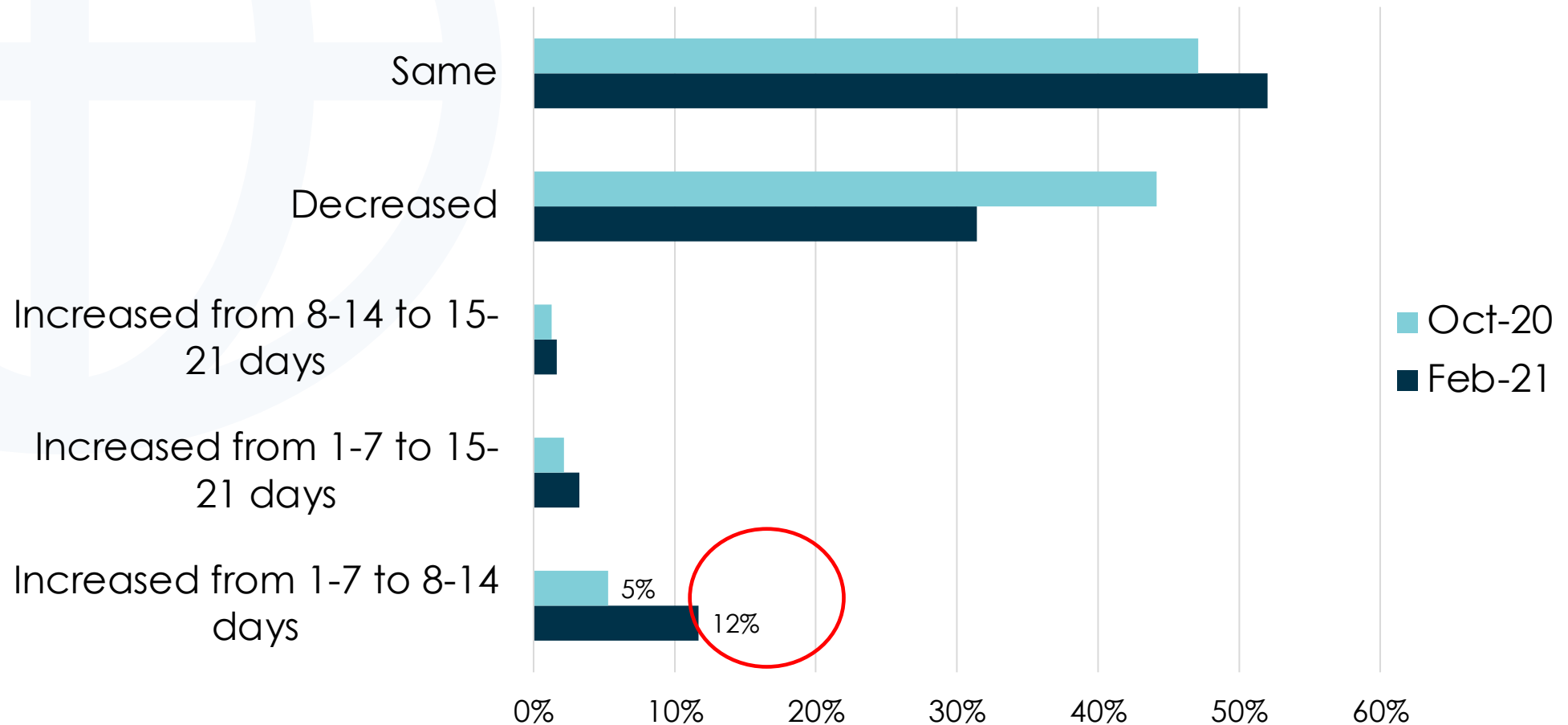
- NO  
Travel seasons remain the same



- YES  
Summer/winter season is being extended into fall/spring or longer

Q15. Have travel seasons being stretched out?

## Length Of Stay More Than Doubled In International Trips From 1-7 To 8-14 Days



60%

+15%  
compared to  
October 2020

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

**Q17.** How much are suppliers' cancellation and flexibility policies impacting your business?



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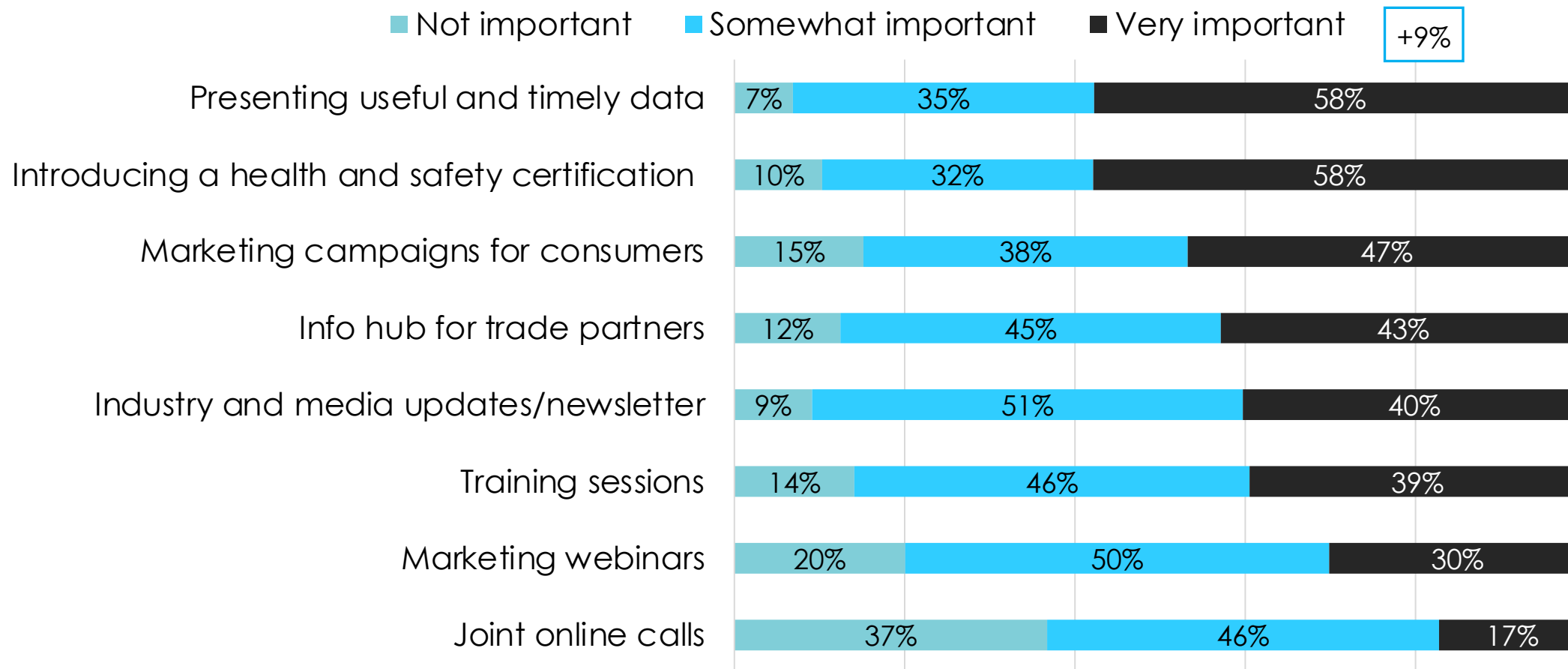
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## THREE MOST REQUESTED ACTIONS FROM DMOs

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

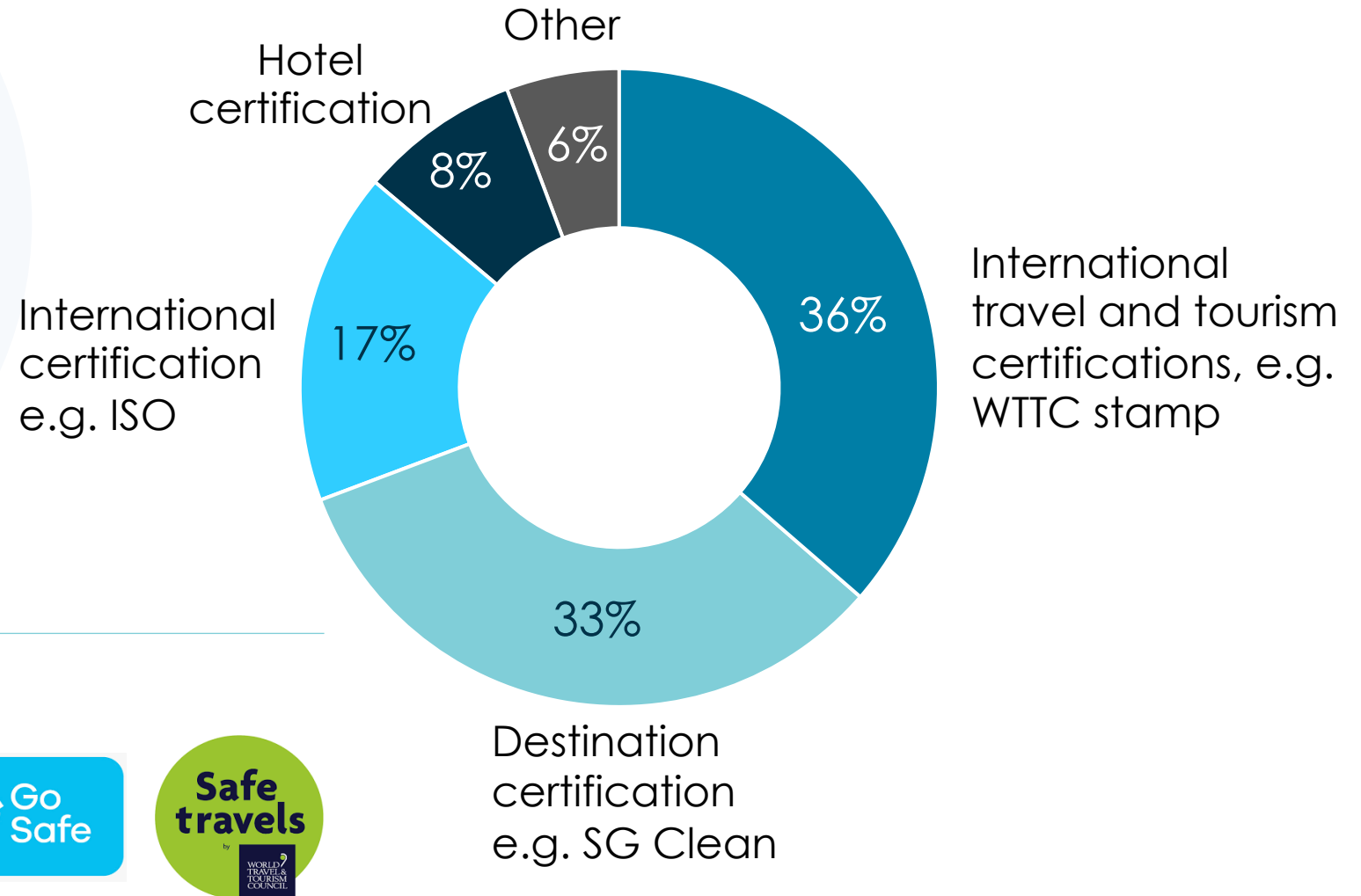
**Q18.** How important are the following actions that destination organizations can do to help you?

## What Activities DMOs Can Do To Support Distribution Partners In Recovery



**Q18.** How important are the following actions that destination organizations can do to help you?

## Certifications are Vital



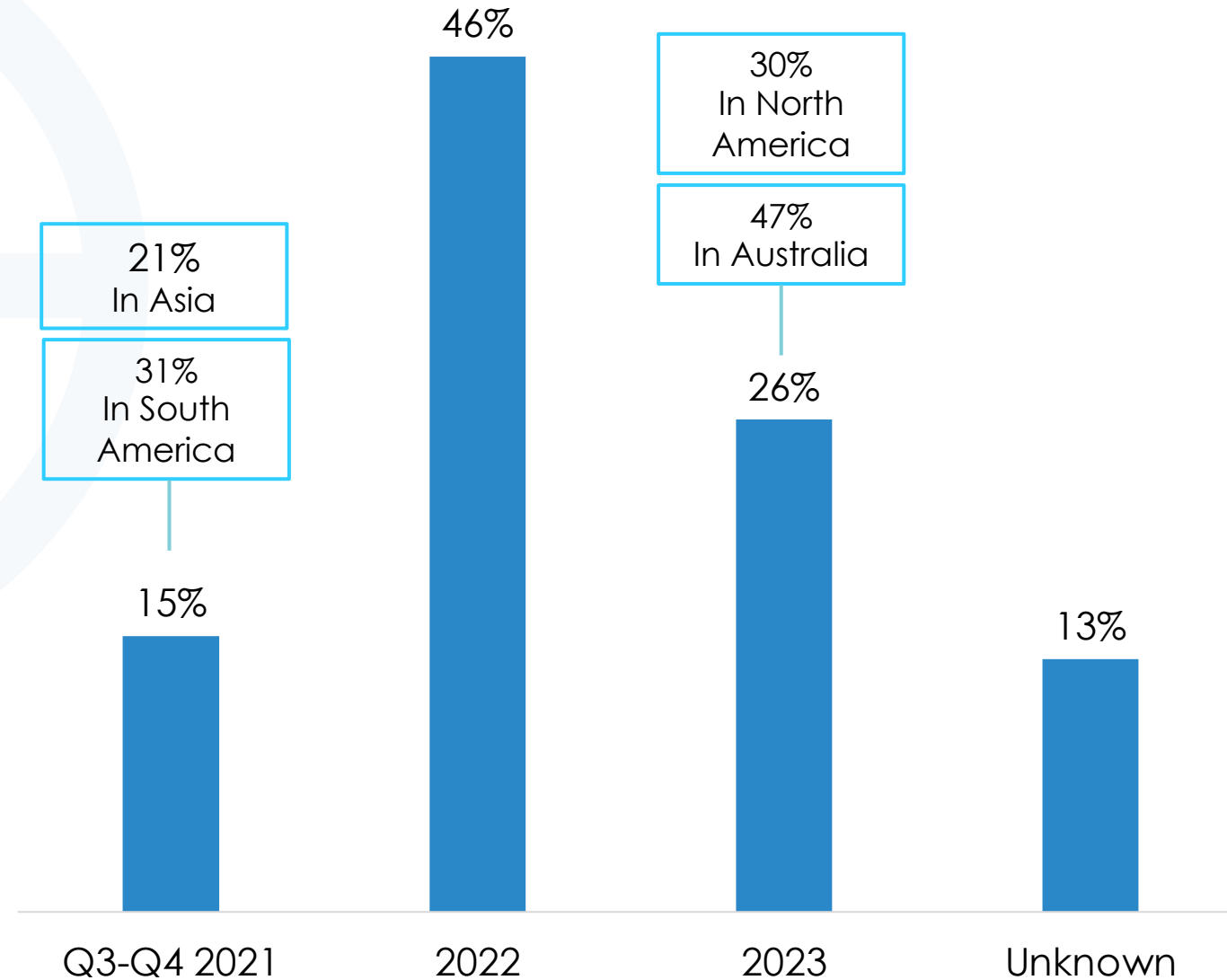
**Q18.** How important are the following actions that destination organizations can do to help you?





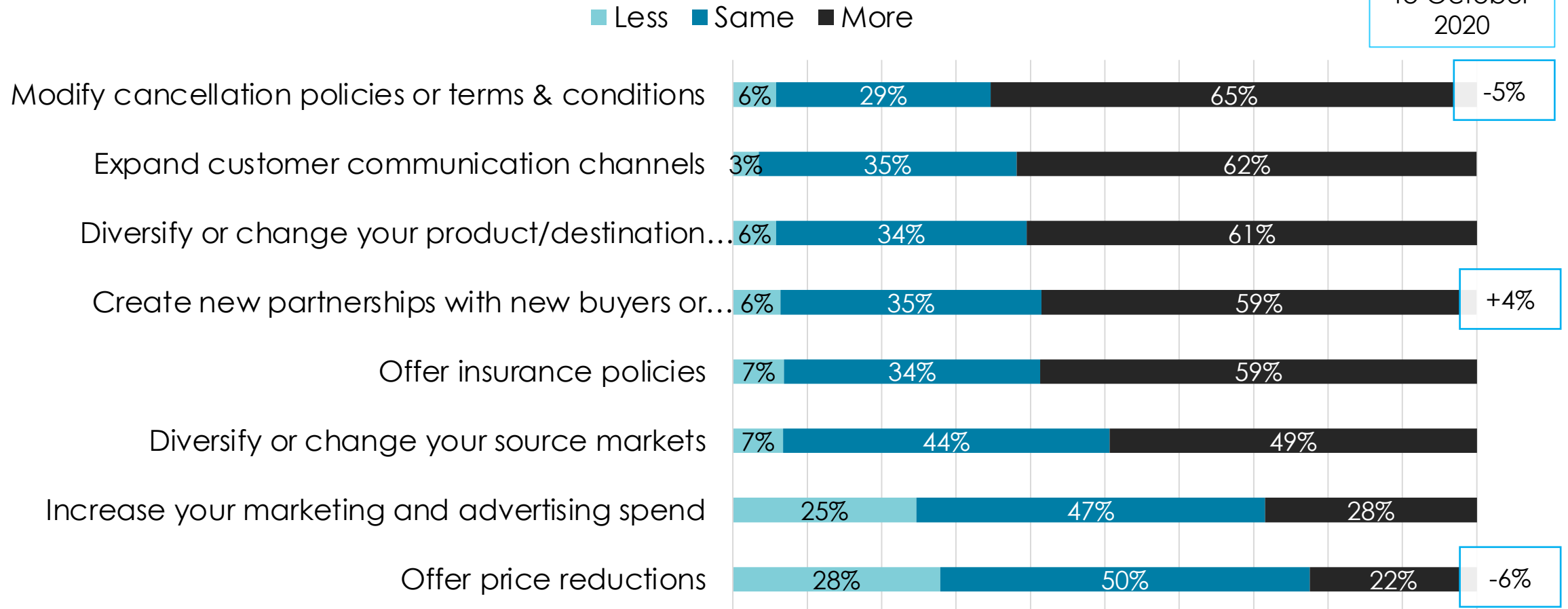
# OUTLOOK

## Forecast for Pre-Covid Levels



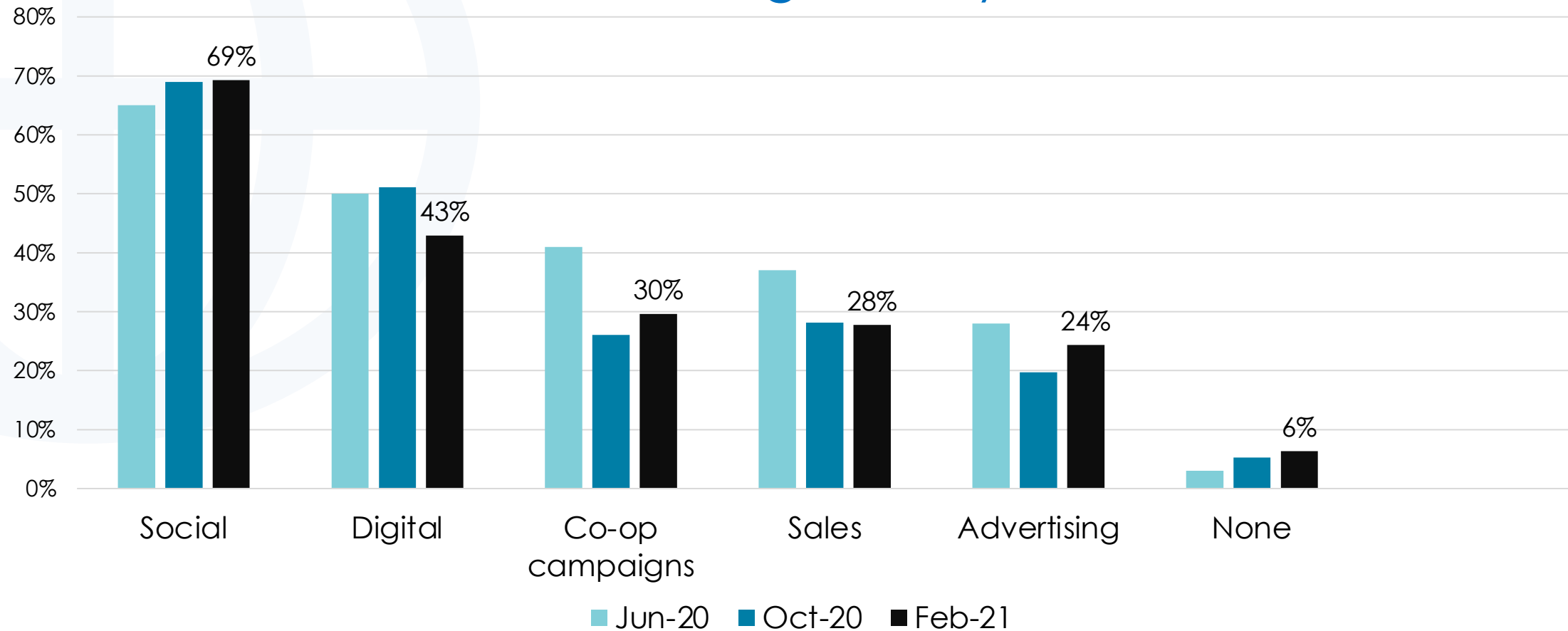
**Q20.** When do you expect your business to go back to normal pre COVID-19 levels?

## Modifying Reservations will be a Major Role



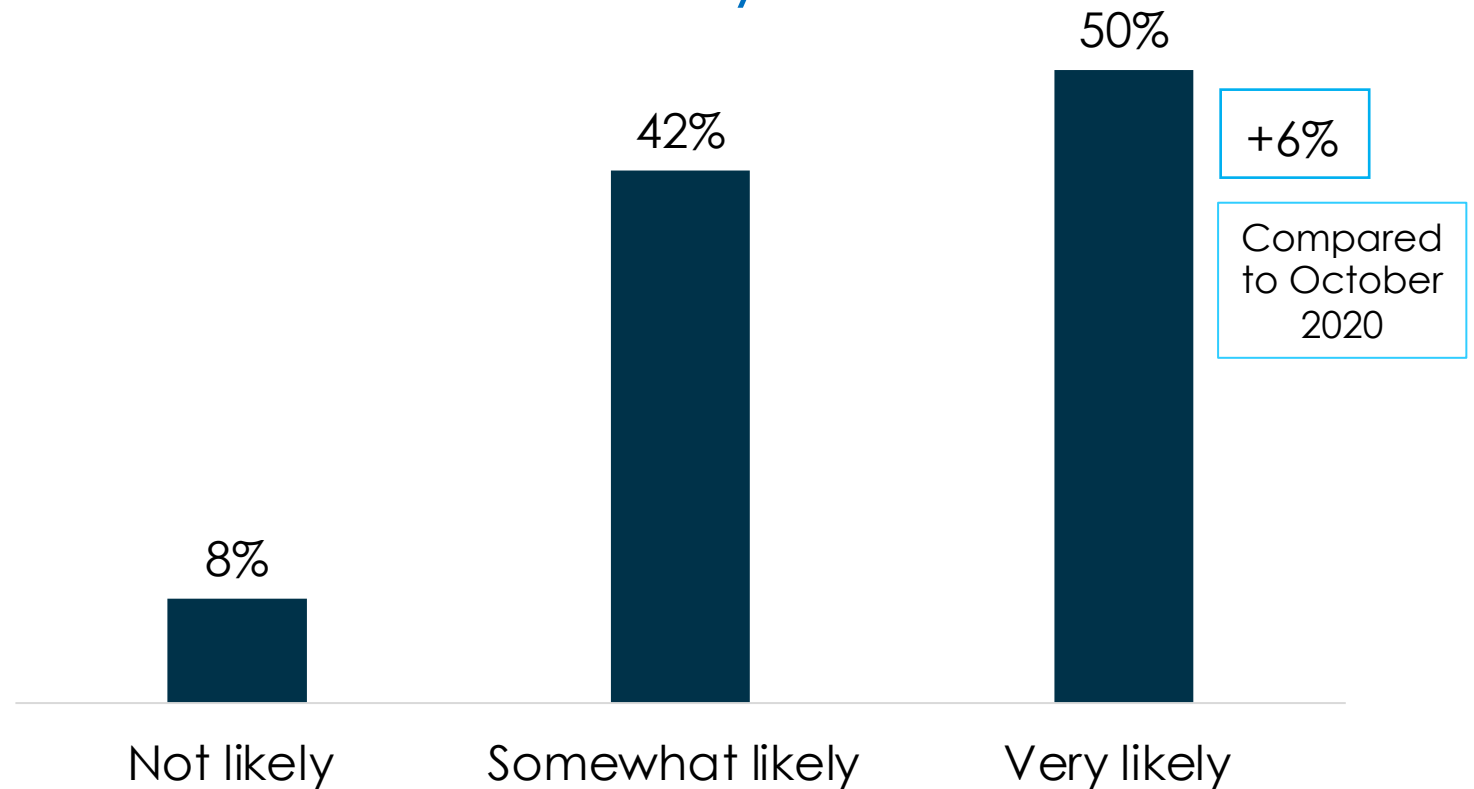
**Q22.** Considering your role will change going forward and become more important to meet consumers' new needs, do you think you will be doing More, Same or Less in 2021?

## Social Media Continues To Be The No. 1 Marketing Activity



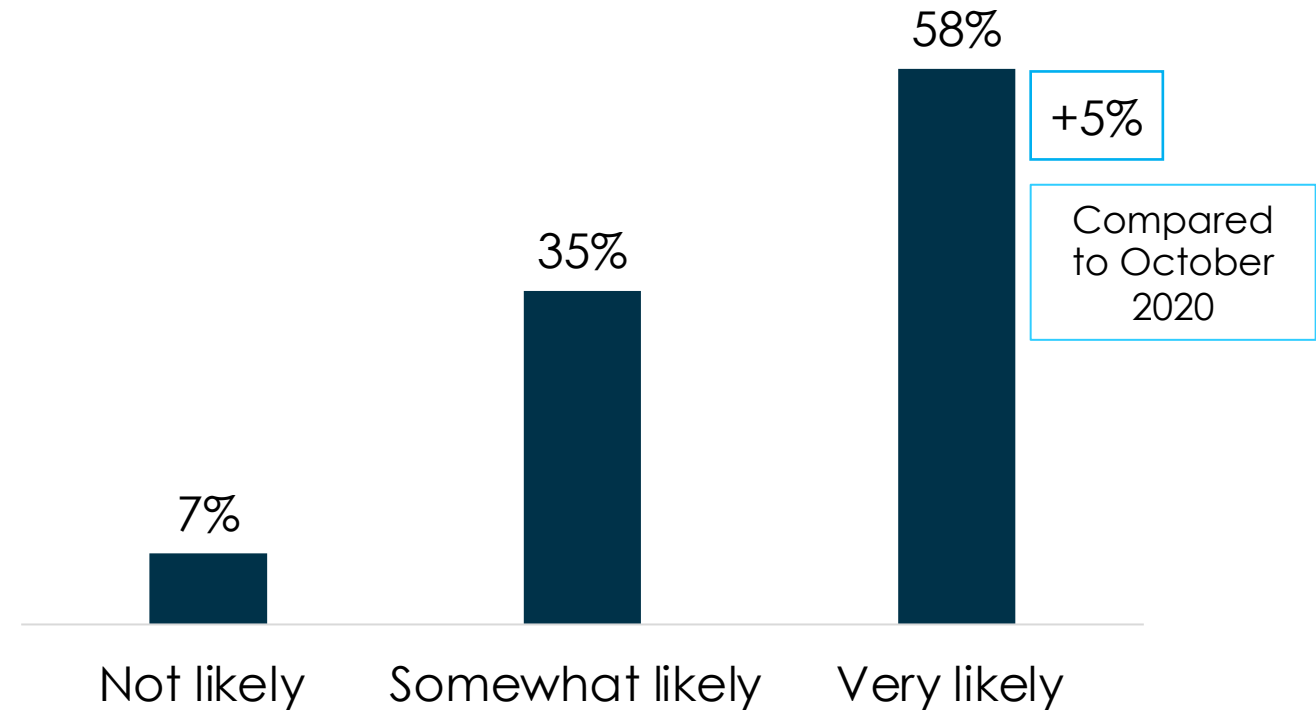
**Q24.** Which marketing activities do you plan for the coming months?

## 50% Of Global Respondents Are Very Likely To Consider HOTELS & RESORTS Not Previously Offered



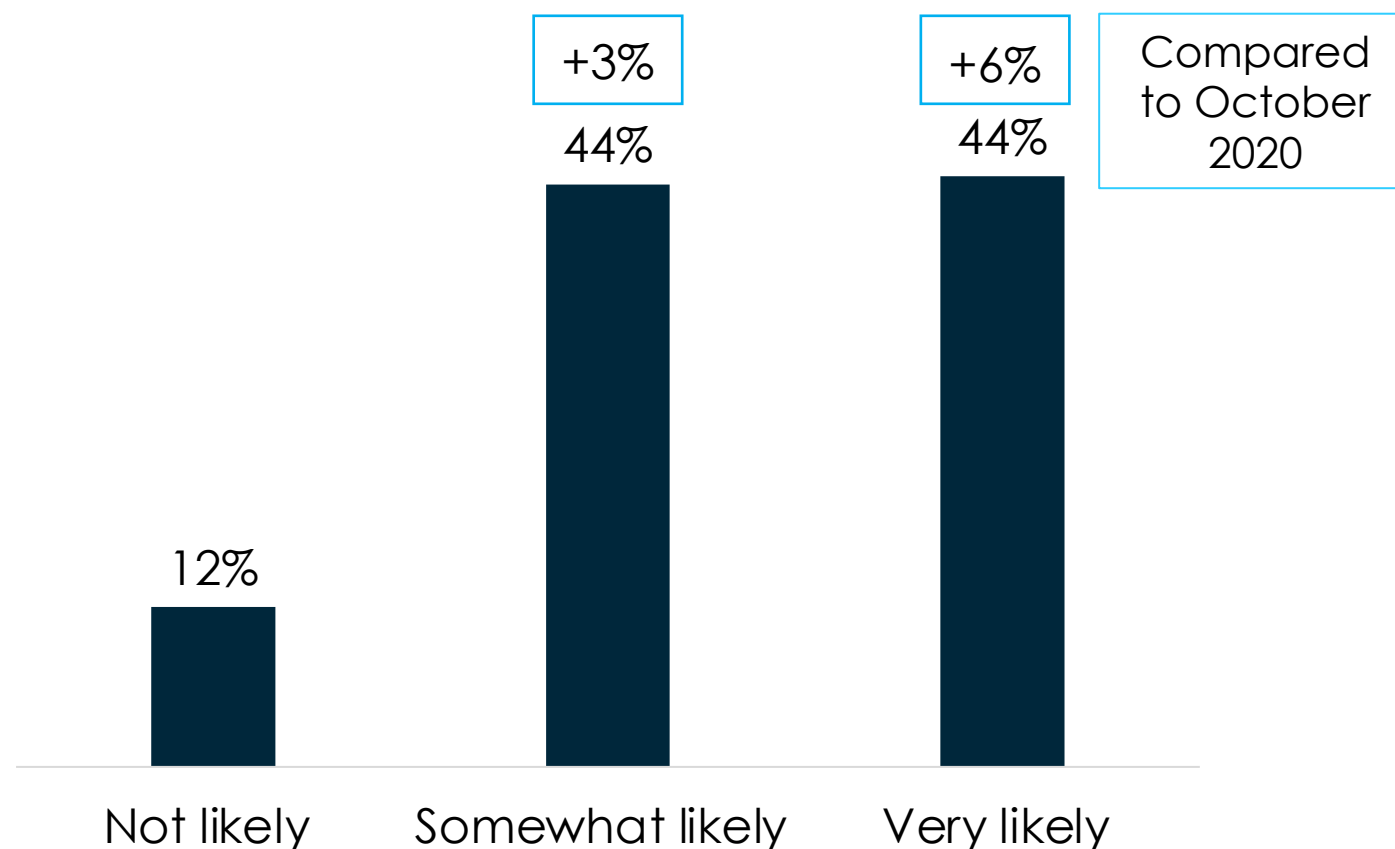
**Q23.** Will you consider hotels & resorts you have never sold before?

## Nearly 60% Of Global Respondents Are Very Likely To Consider DESTINATIONS Not Previously Offered



**Q23.** Will you consider destinations you have never sold before?

## 44% Of Respondents Are Likely And Very Likely To Consider New SUPPLIERS



**Q23.** Will you consider suppliers you have never offered before?

## Evolving Roles

### Round I, June 2020

Answered: 657 Skipped: 246



### Round II, October 2020

Answered: 635 Skipped: 386



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



## Evolving Roles

- Becoming more of an advising and information source during 2021 and beyond.
- Increasing awareness of critical markets and requirements.
- Being more trusted by travellers who will depend upon travel advisors more than before for accurate and timely information.
- Running more checks and scrutiny while selecting a destination.
- Offering more flexibility, support and reassurance to their client (less sales, service fees will need to be applied).

### Round III, February 2021

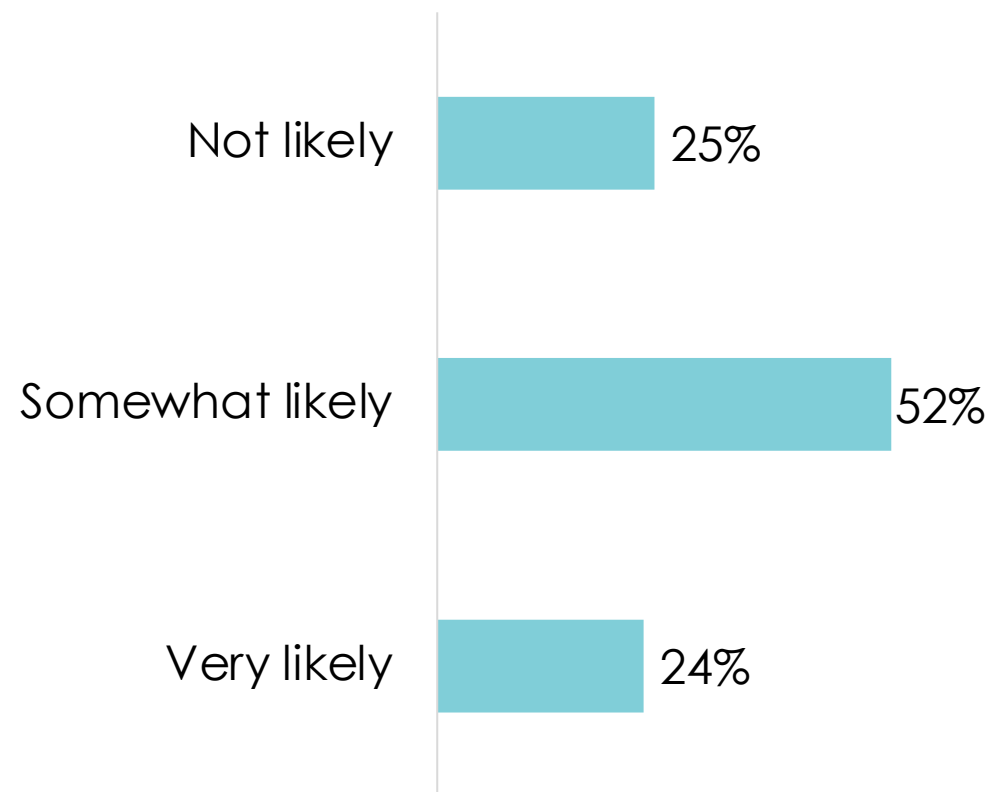
Answered: 790 Skipped: 502



*“We will become even more trusted and the "go to" person for all our customer's travel needs”*

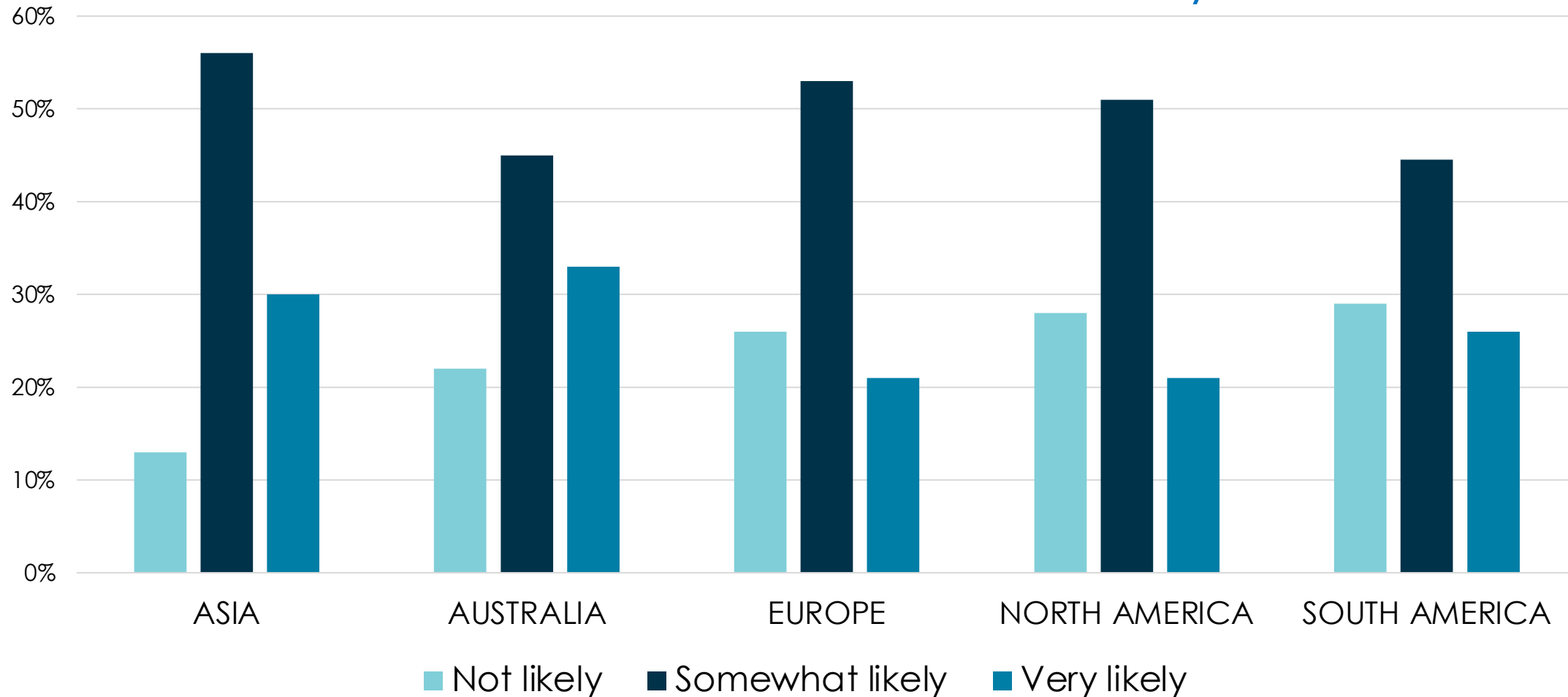


## A Much Smaller... And different Industry



**Q21.** What's the likelihood of your staff or independent contractors leaving the industry in 2021?

## A Much Smaller... And different Global Industry



**Q21.** What's the likelihood of your staff or independent contractors leaving the industry in 2021?

## For More Information Please Contact Your Local Travel Consul Agency Partner



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SOUTH AMERICA



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CENTRAL EASTERN  
EUROPE



Interface Tourism  
France

FRANCE



GERMANY

AIGO

ITALY



NORDICS



RUSSIA



SPAIN



THE NETHERLANDS



UK



AUSTRALIA



CHINA



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managing your destinations' image  
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