



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.



Reaching Today's Decision-Makers

B2B AND B2C TARGET AUDIENCES + INFLUENTIAL MEDIA + VALUABLE STAKEHOLDERS

AGENCIES

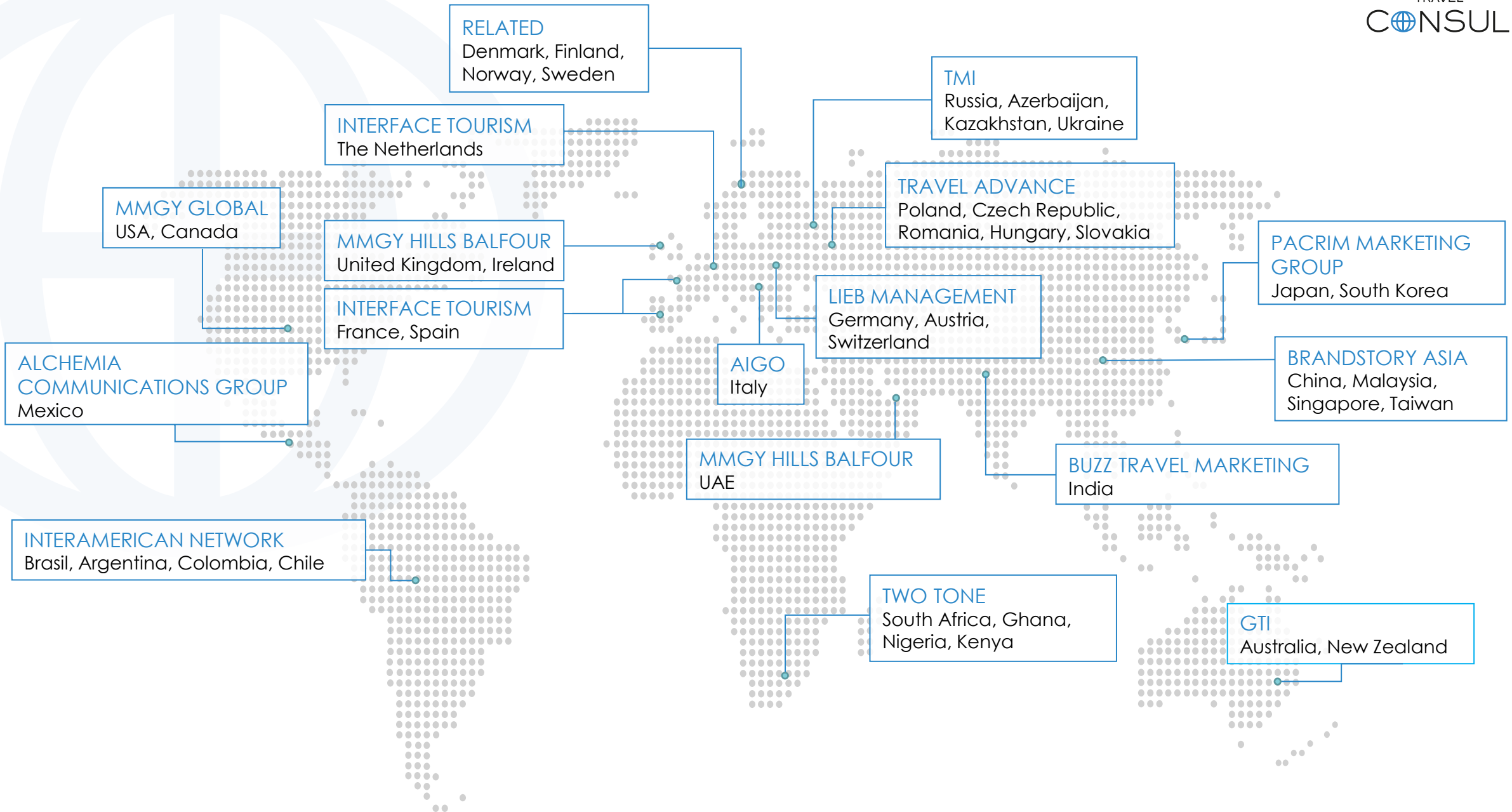
18

COUNTRIES

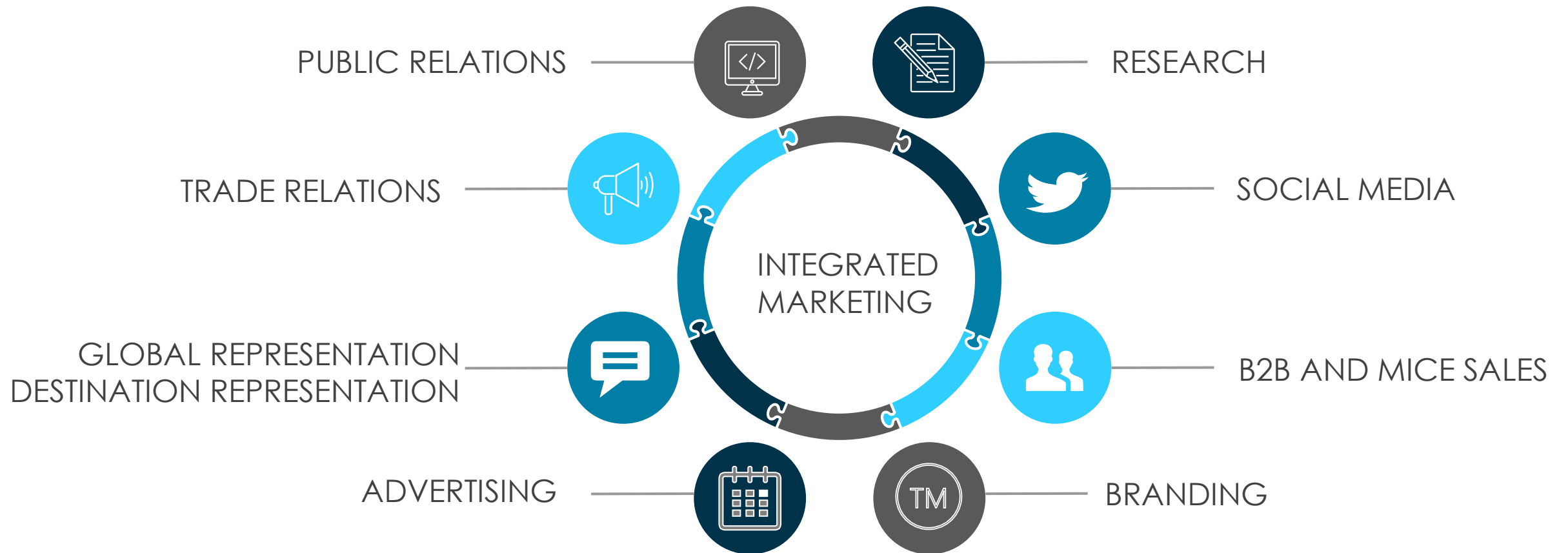
44

CONTINENTS

6



Global Services For Global Clients



Some Clients Working with Travel Consul Agencies in Multiple Markets



The Survey

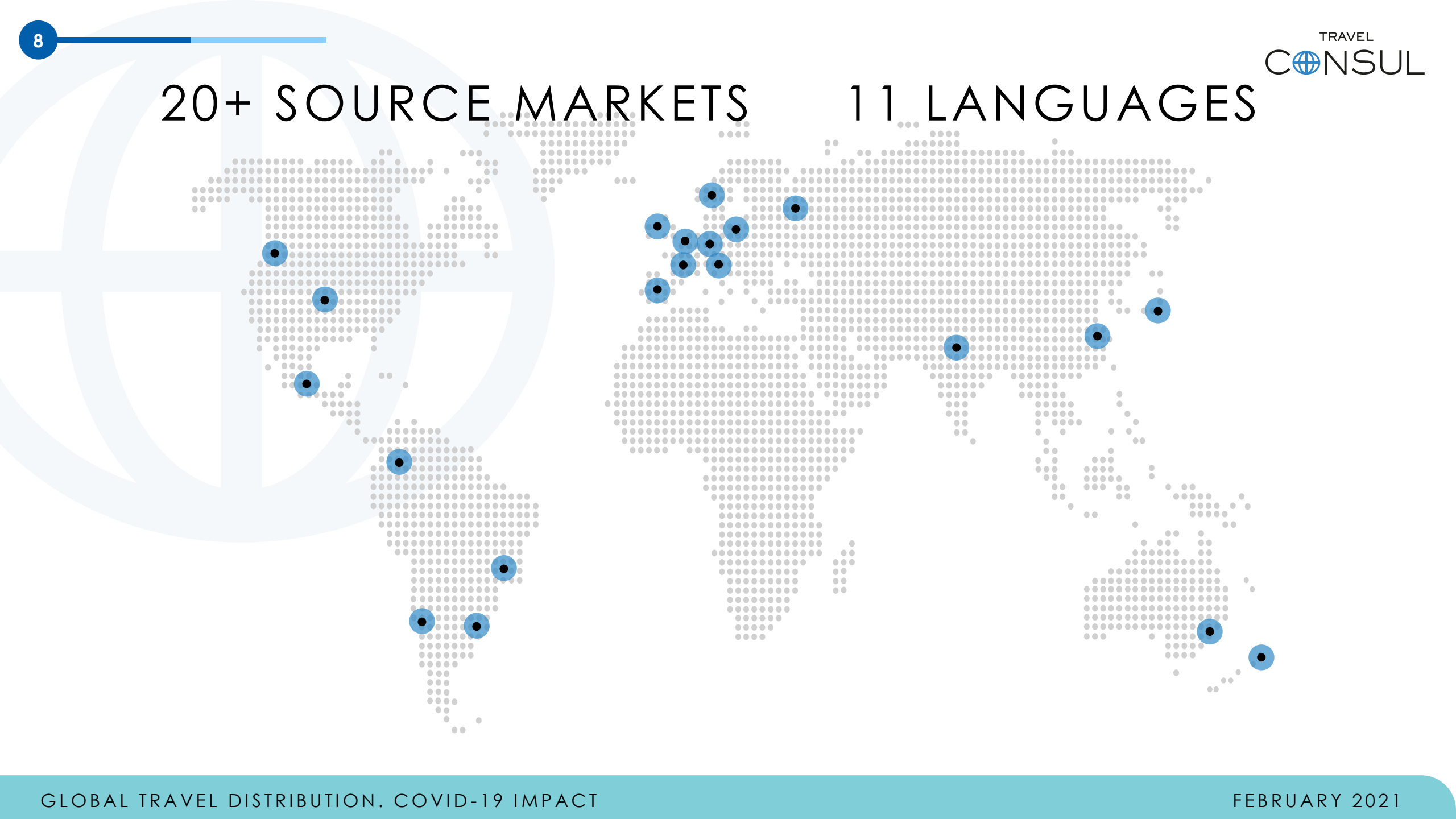
Travel Consul launched its third survey to better understand the impact of COVID-19 on the industry and the future recovery of global travel distribution.

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.

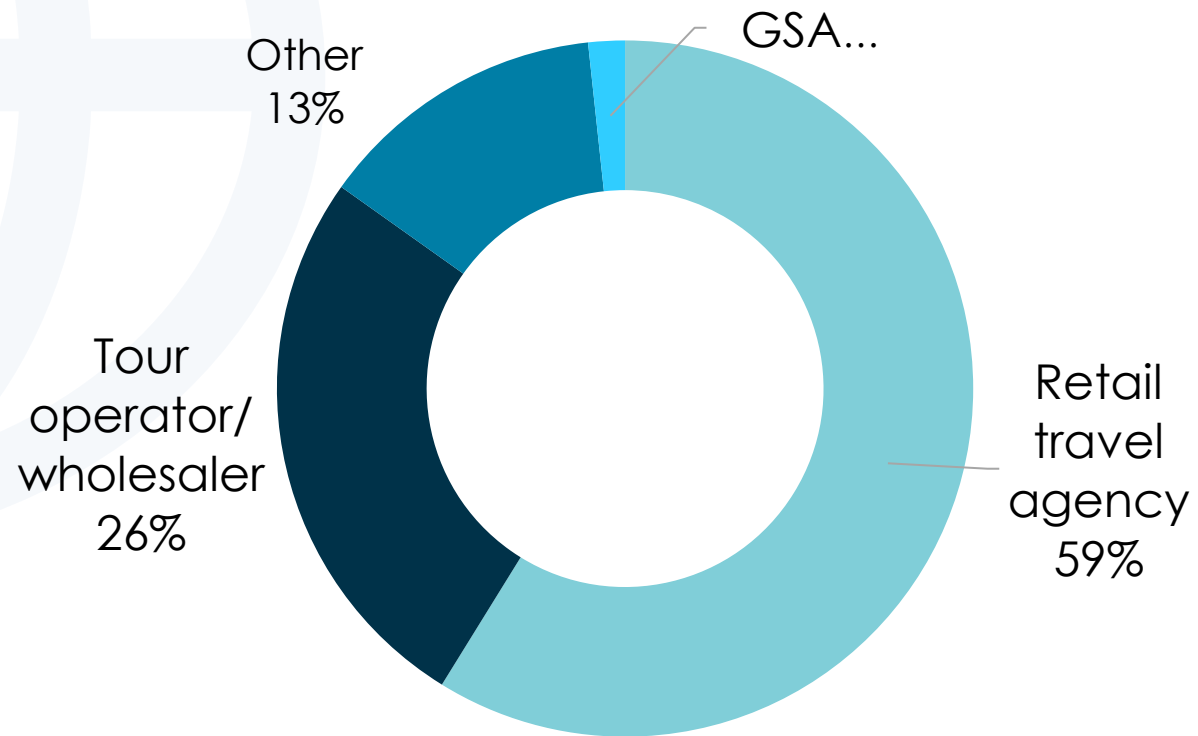
20+ SOURCE MARKETS

11 LANGUAGES



Respondents by Company Type

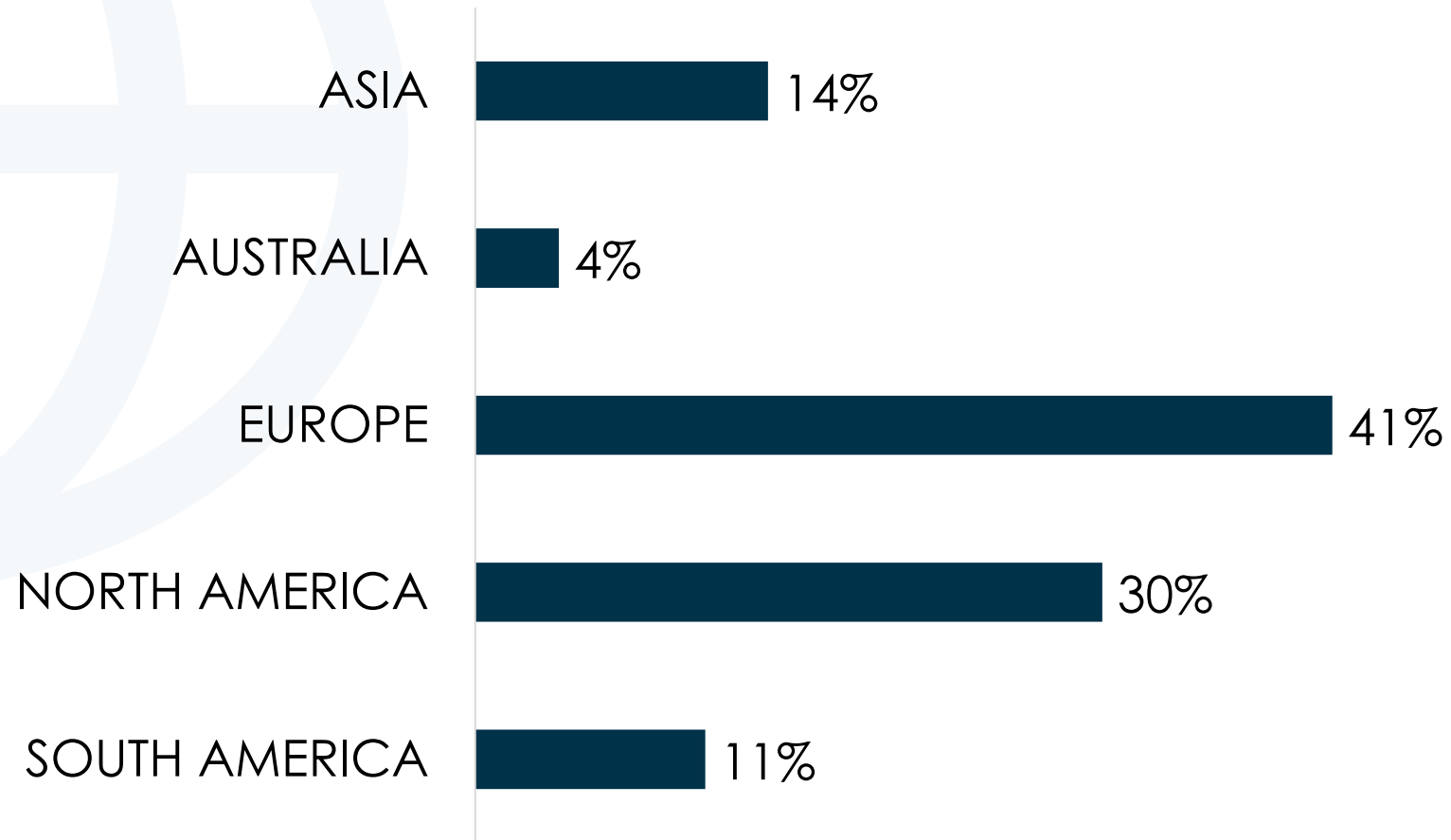
1,292 COMPLETE RESPONSES



Q1. Respondents by company type

Respondents by Continent of Main Operation

1,292 COMPLETE RESPONSES

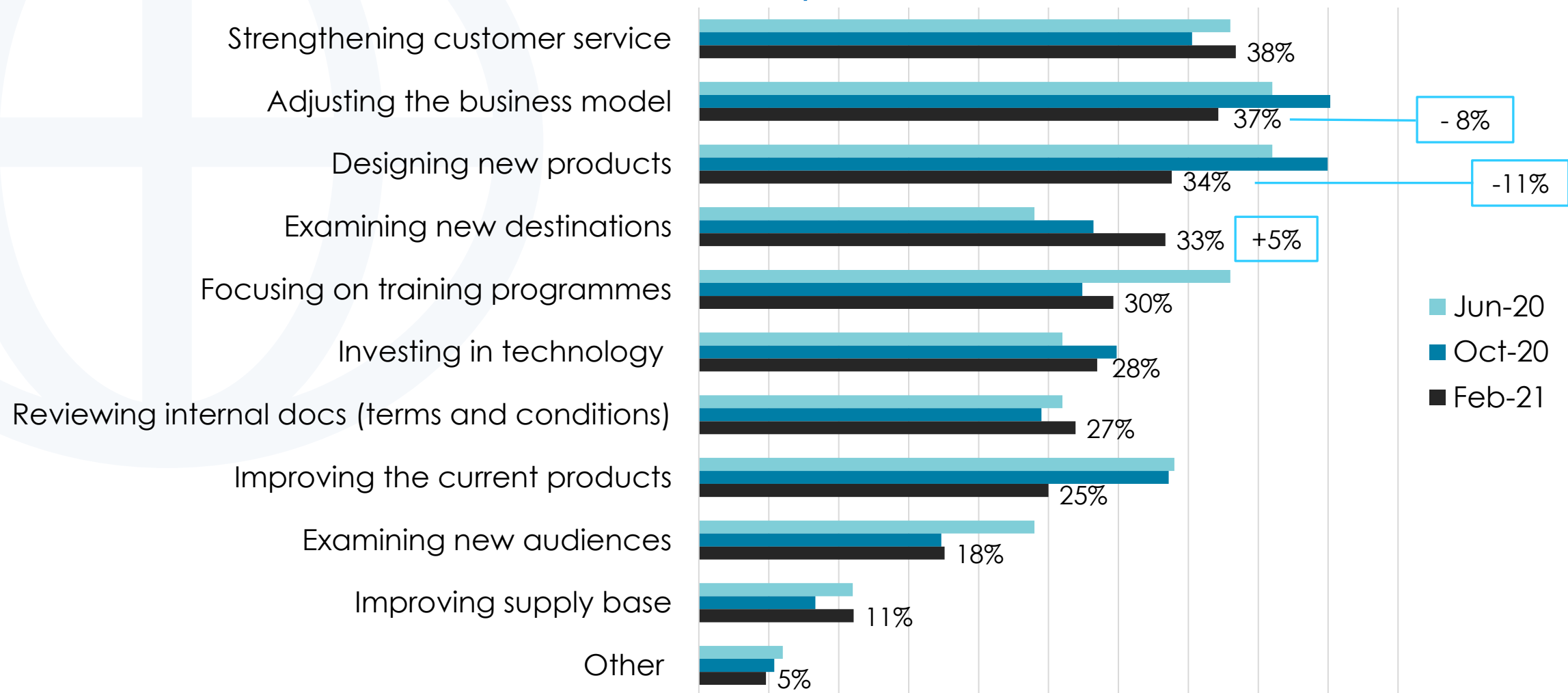


Q2. Continent of company's main operation



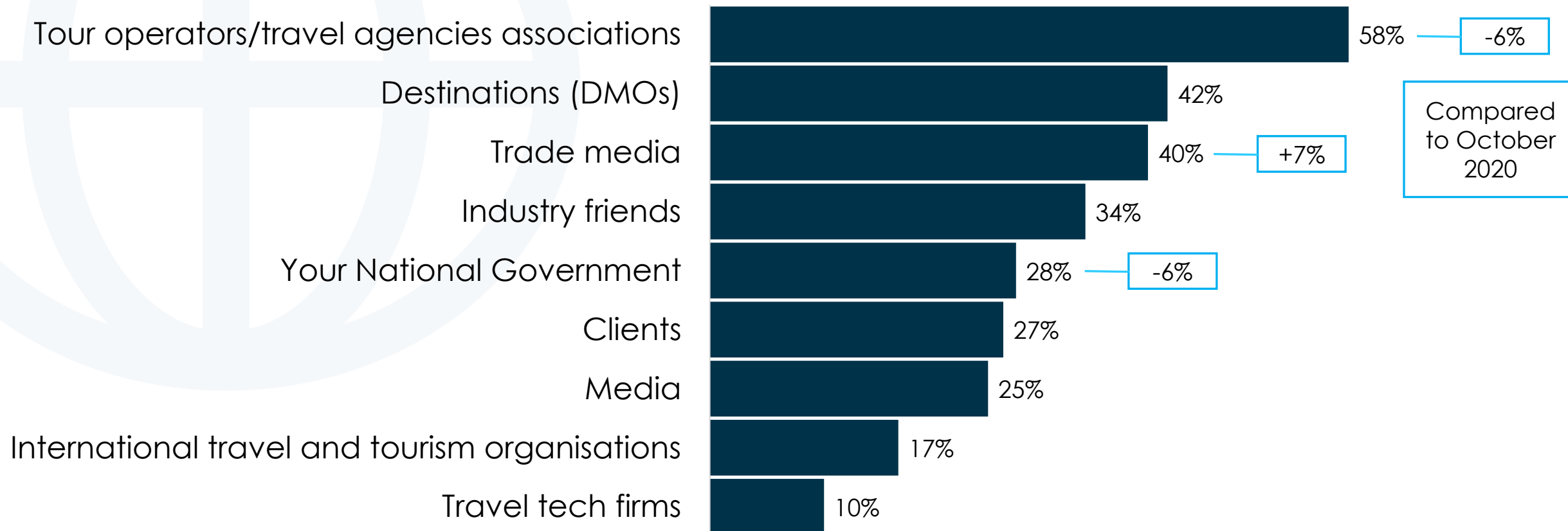
RESPONSE TO COVID-19

Searching New Destinations Records a Consistent 5% Increase



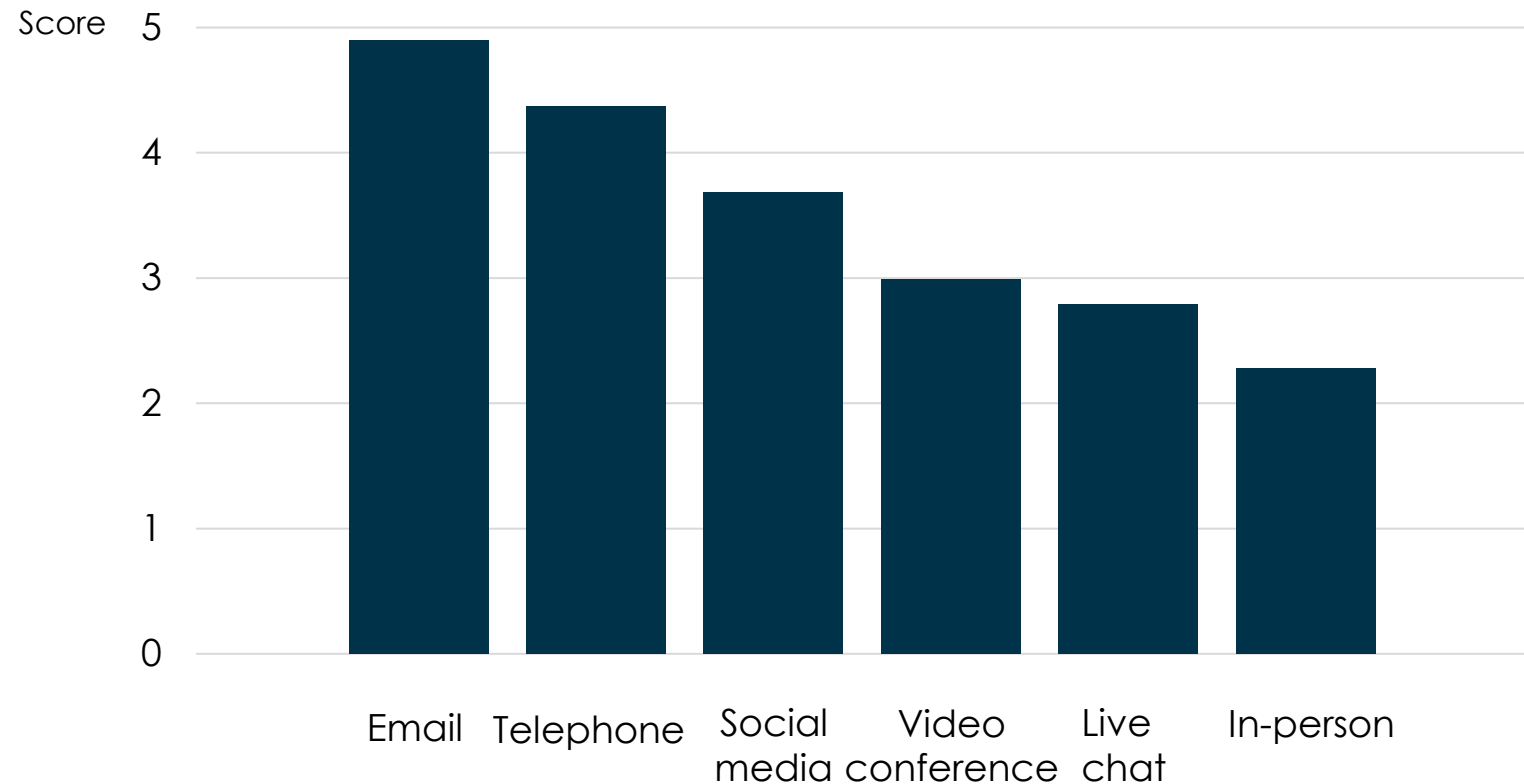
Q3. What TOP THREE measures has your company implemented during the last three months?

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?

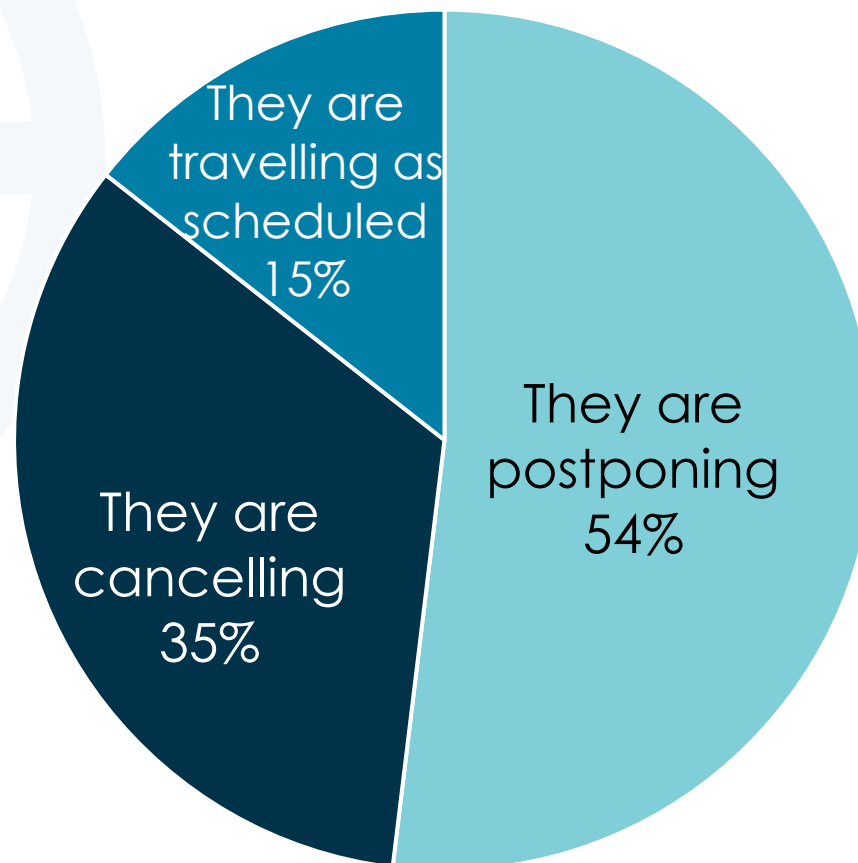
The Telephone Continues to Be the Second Most Popular Channel



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

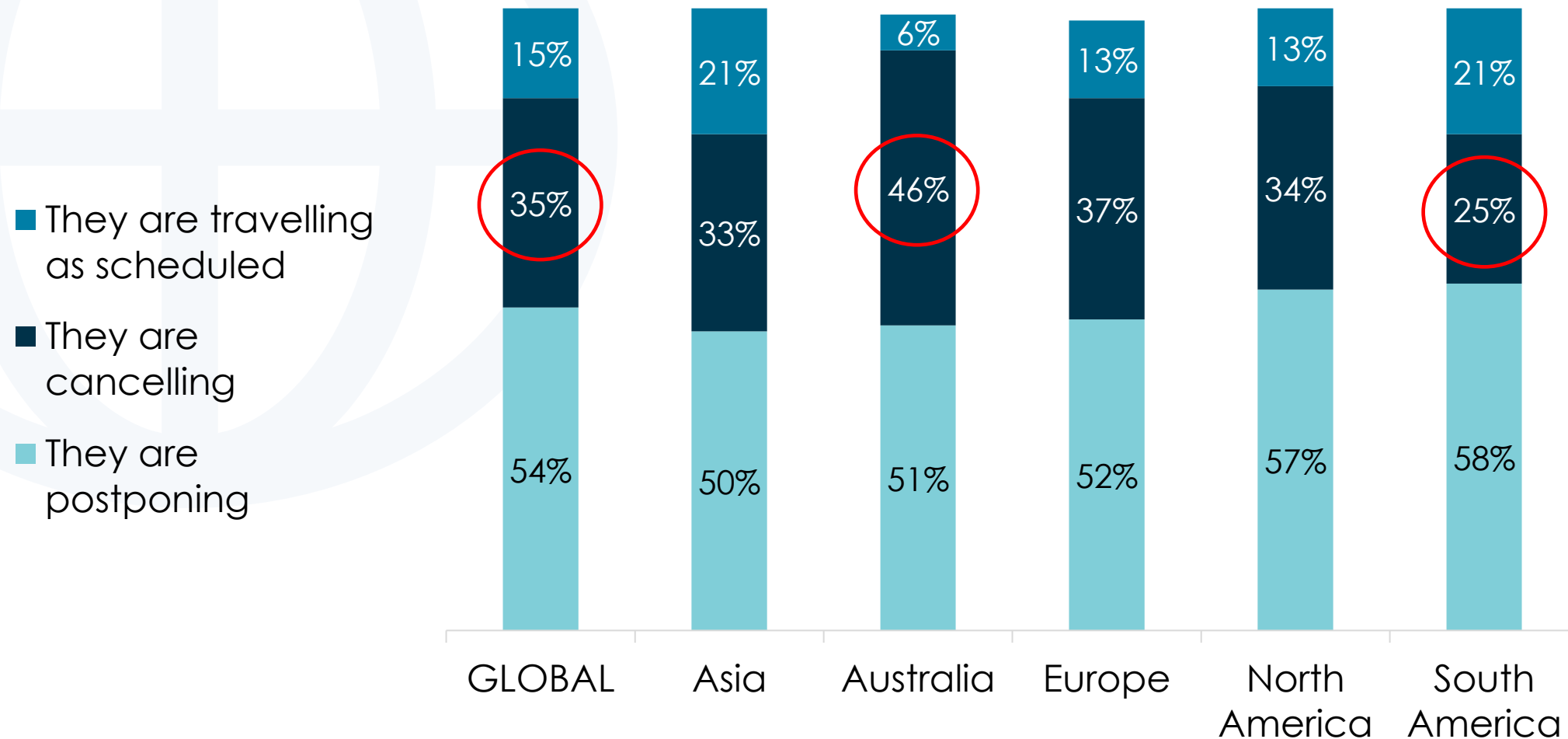
CHANGES AHEAD

Globally, Over Half Are Postponing Their Trips



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

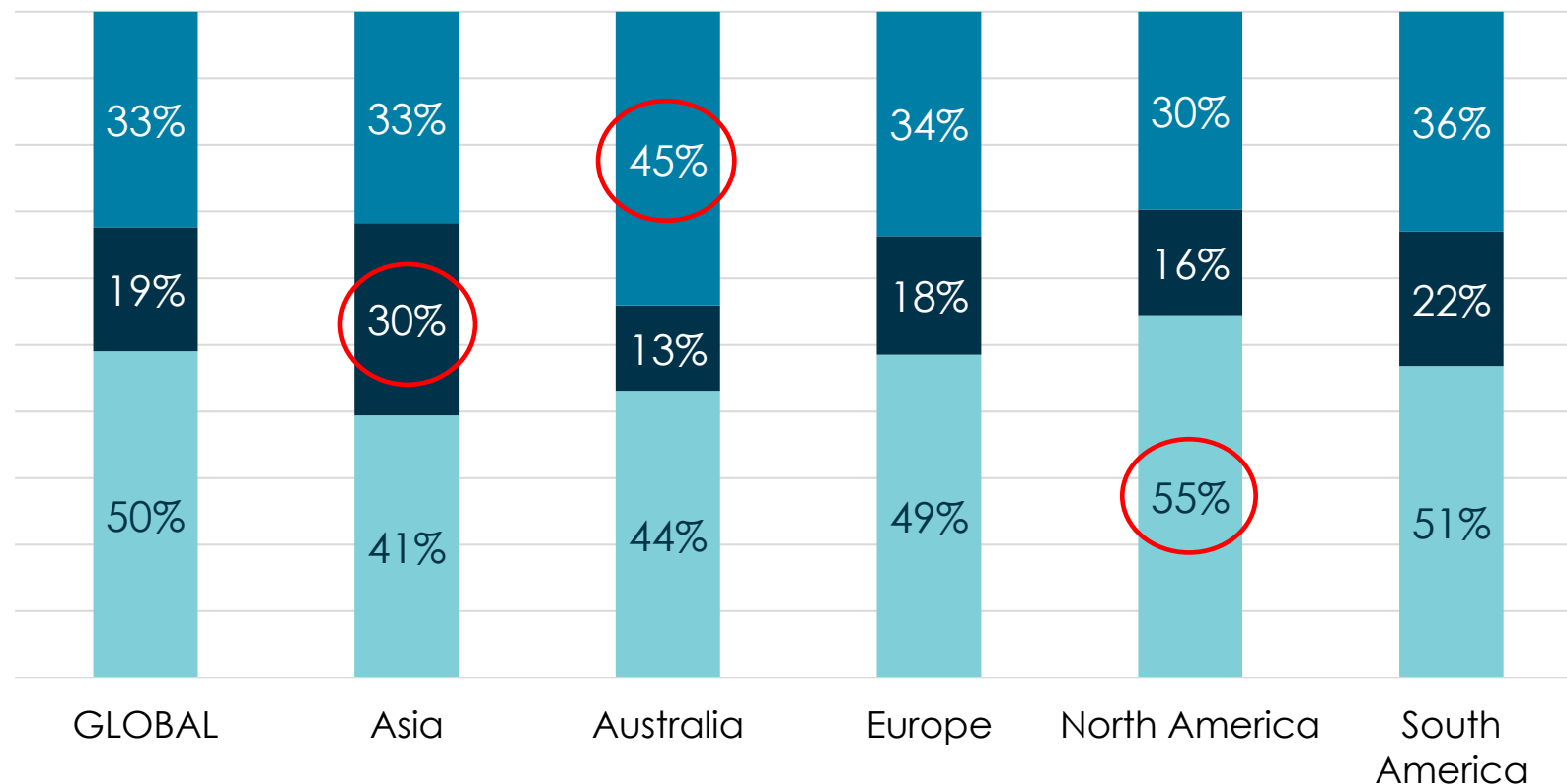
Significant Differences Per Continent



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

- Waiting to decide
- Changing destinations
- Looking to go to 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

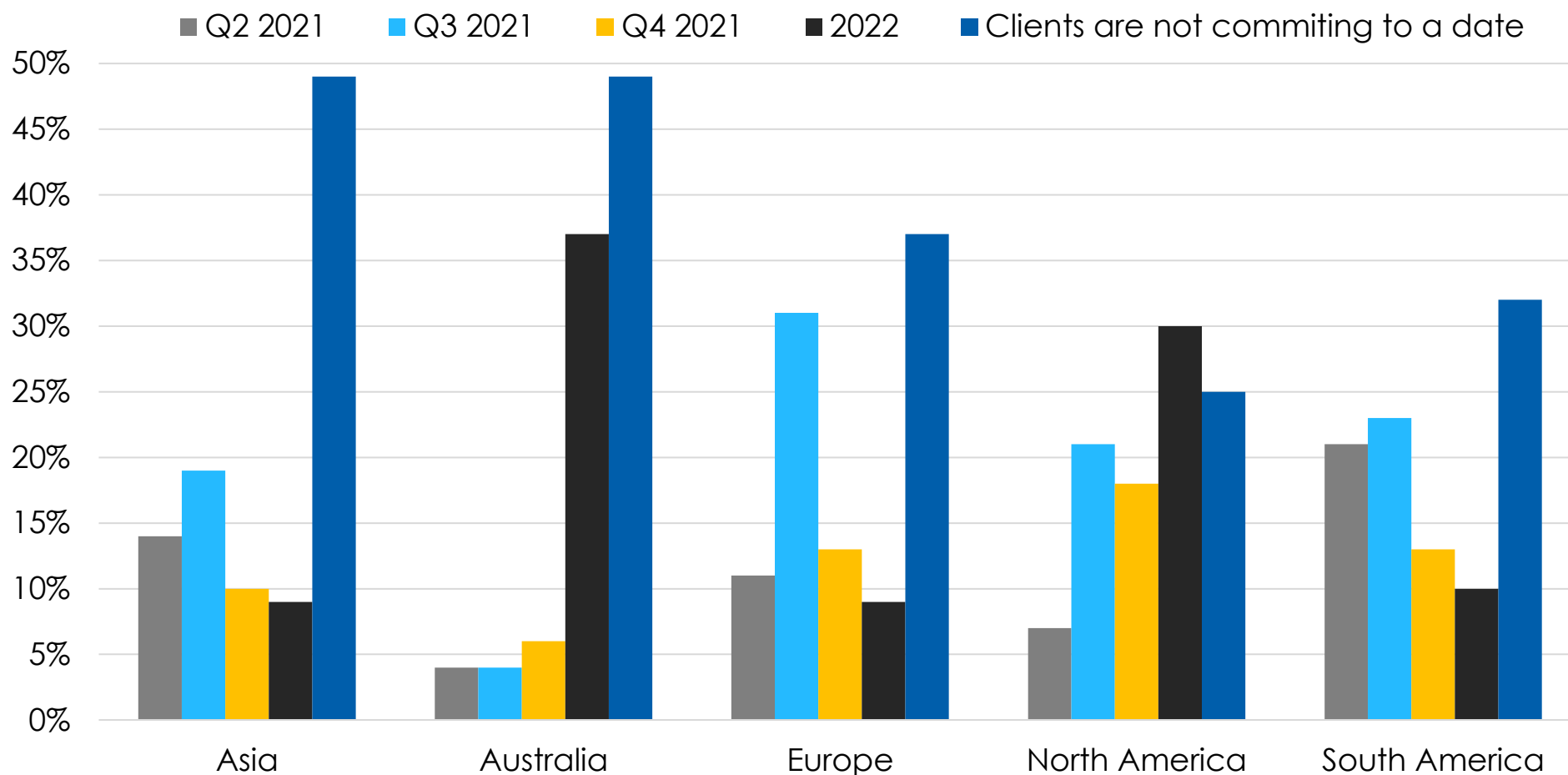
14% ~ Q4 2021

16% ~ 2022

35% ~ Clients are not committing to a date

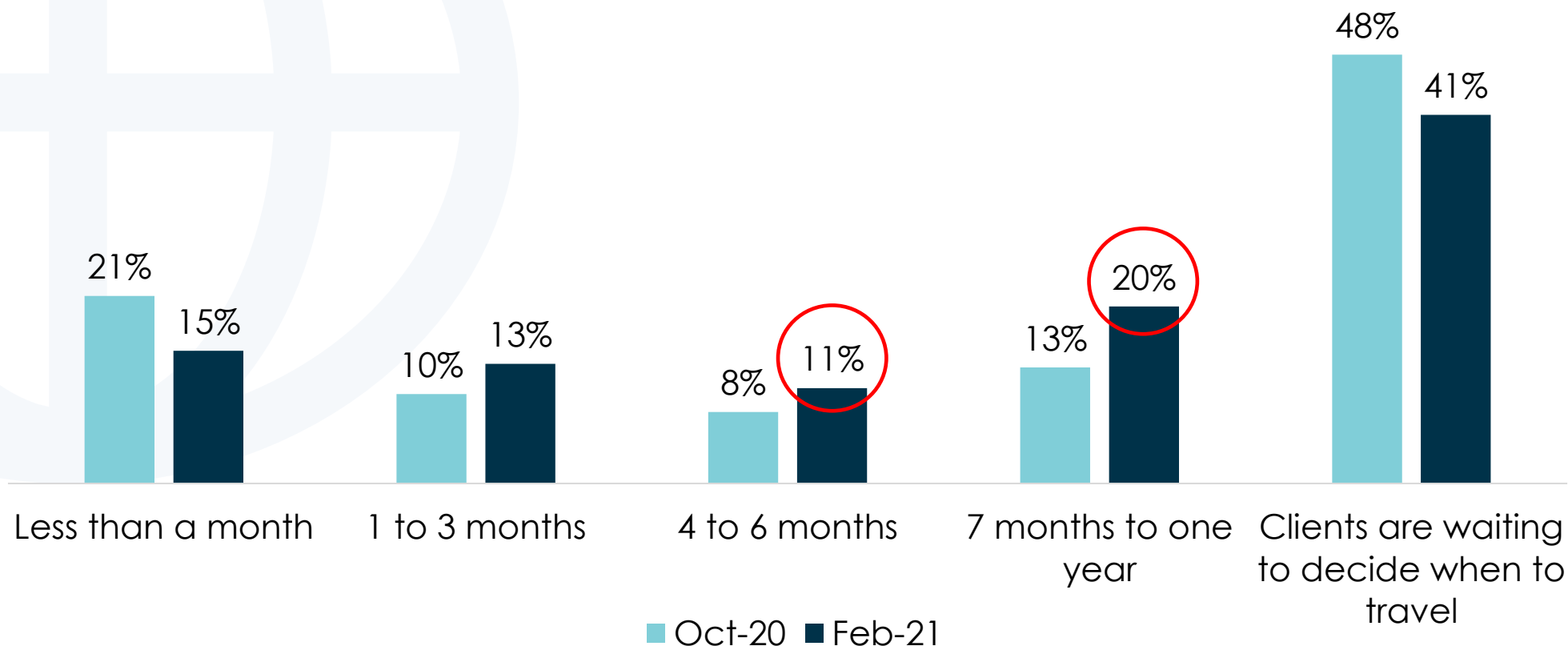
Q6.2 Of those clients who are postponing, in which one period are they rebooking the most?

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



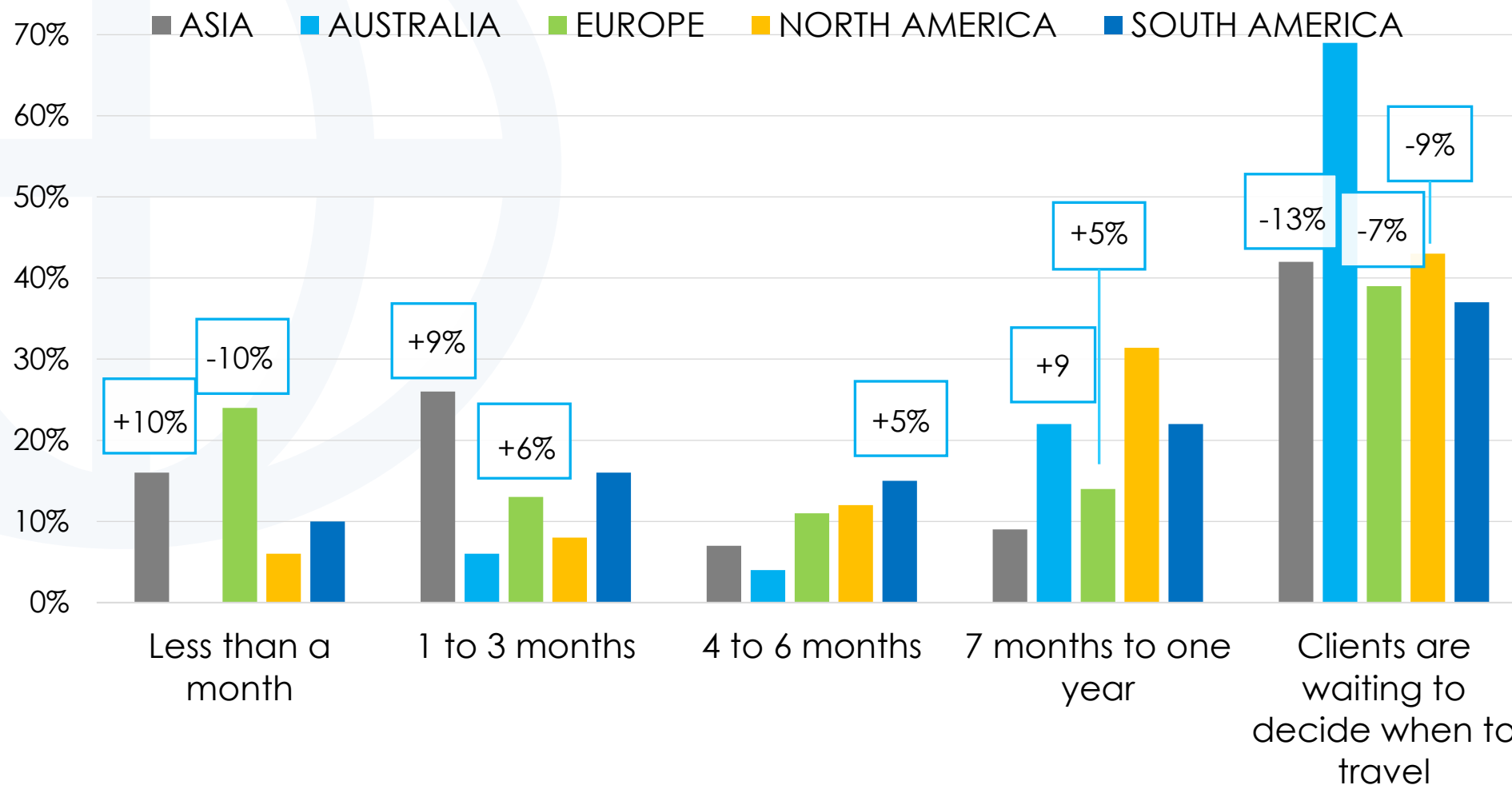
Q6.2 Of those clients who are postponing, in which one period are they rebooking the most?

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?

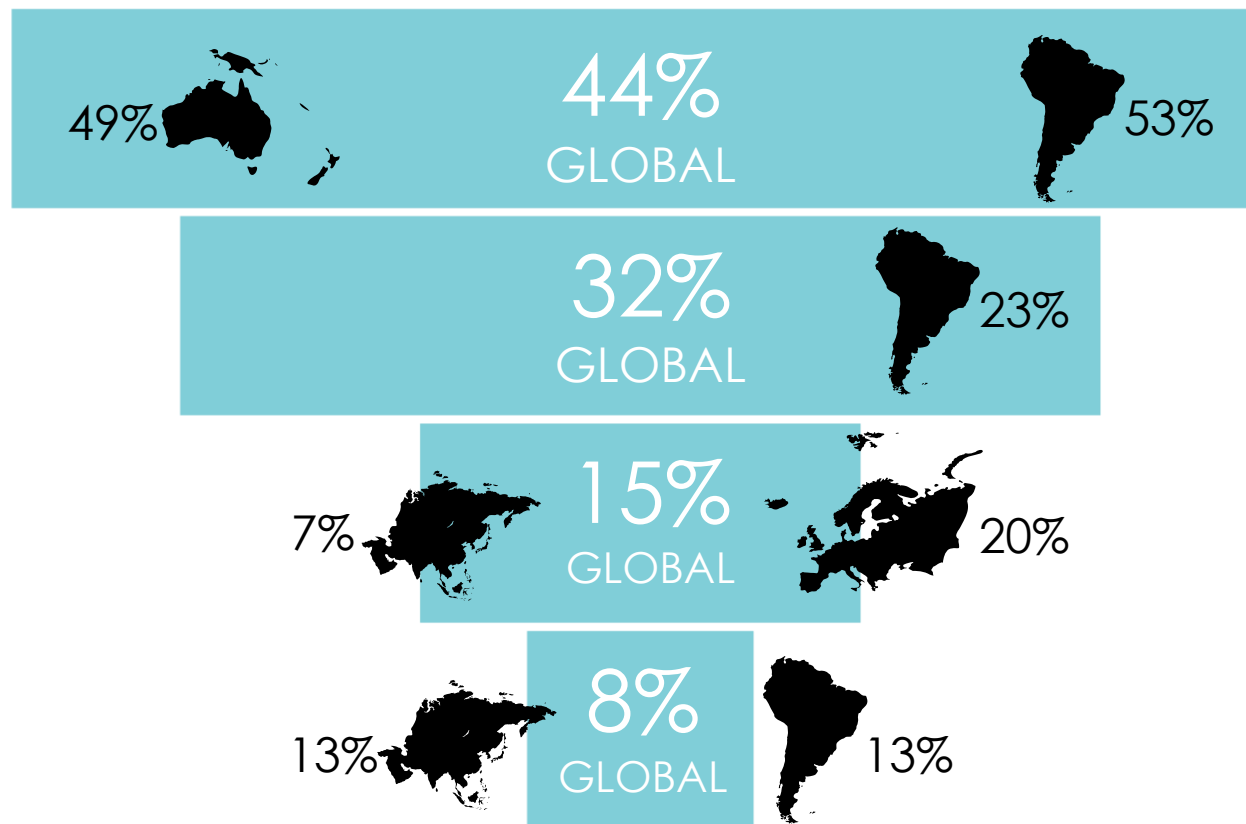
Widespread Vaccinations Will Stimulate Bookings

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

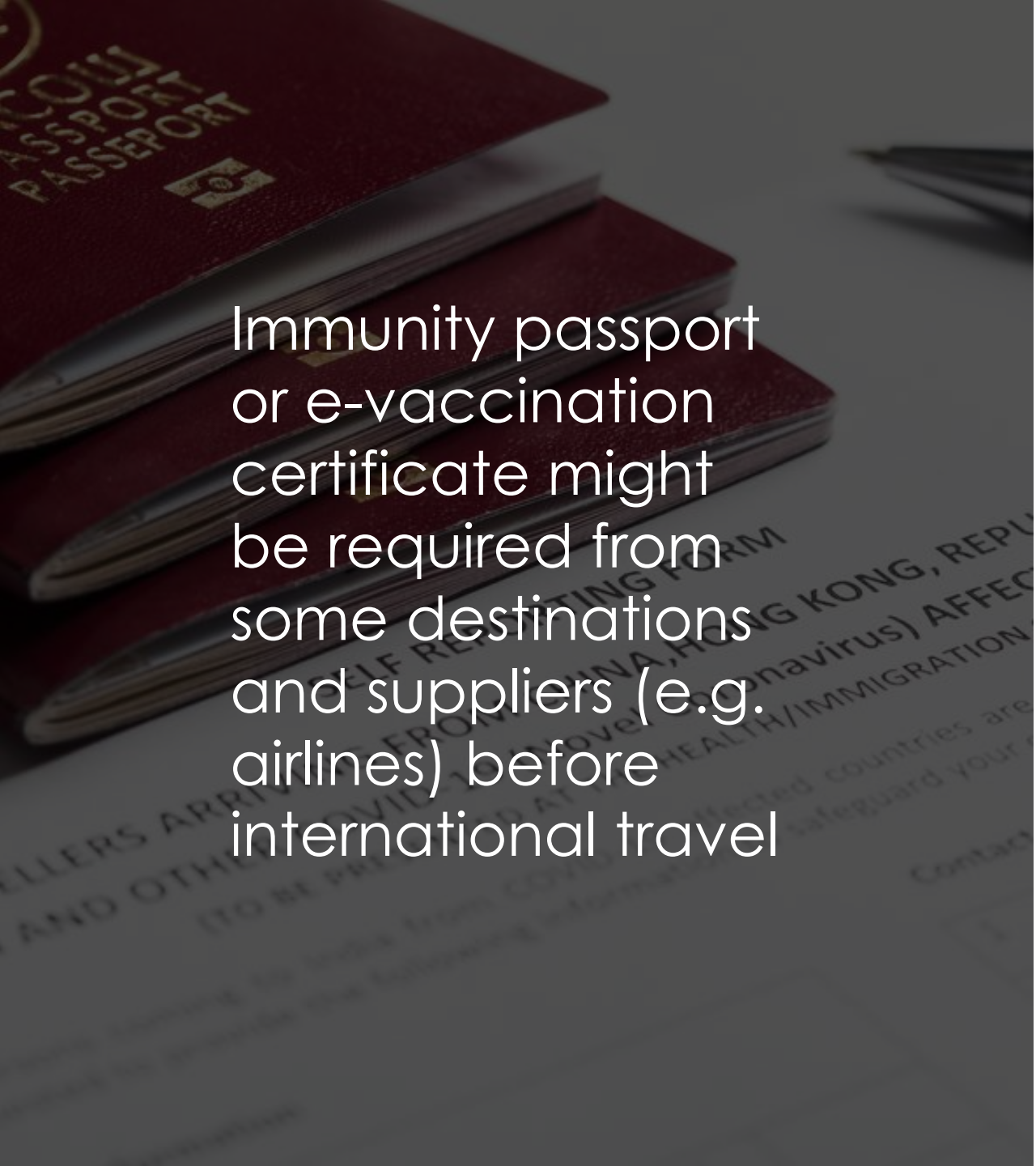
Other factors (e.g. destination health certificate, reducing quarantine, free covid-19 test) will have more impact

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?

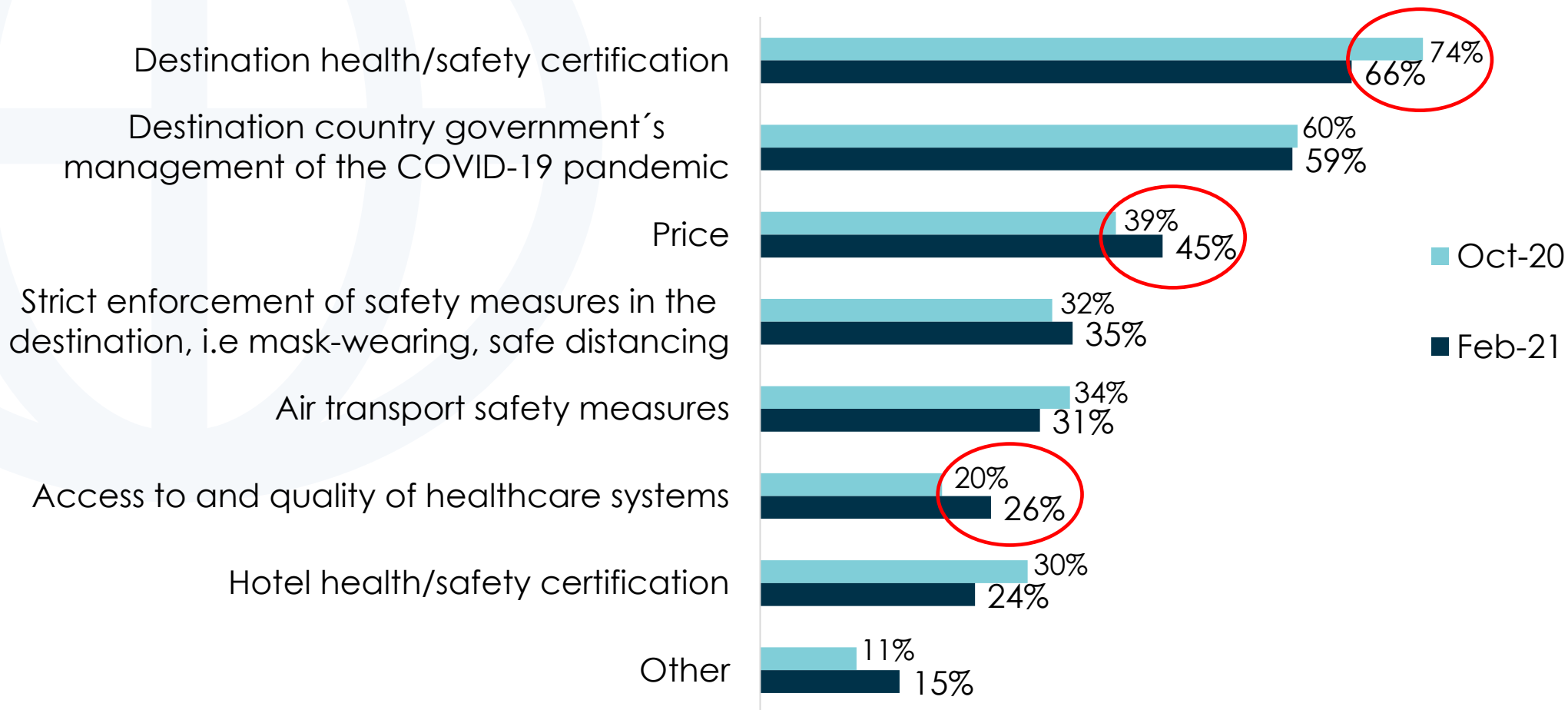
Temperature
Screening



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

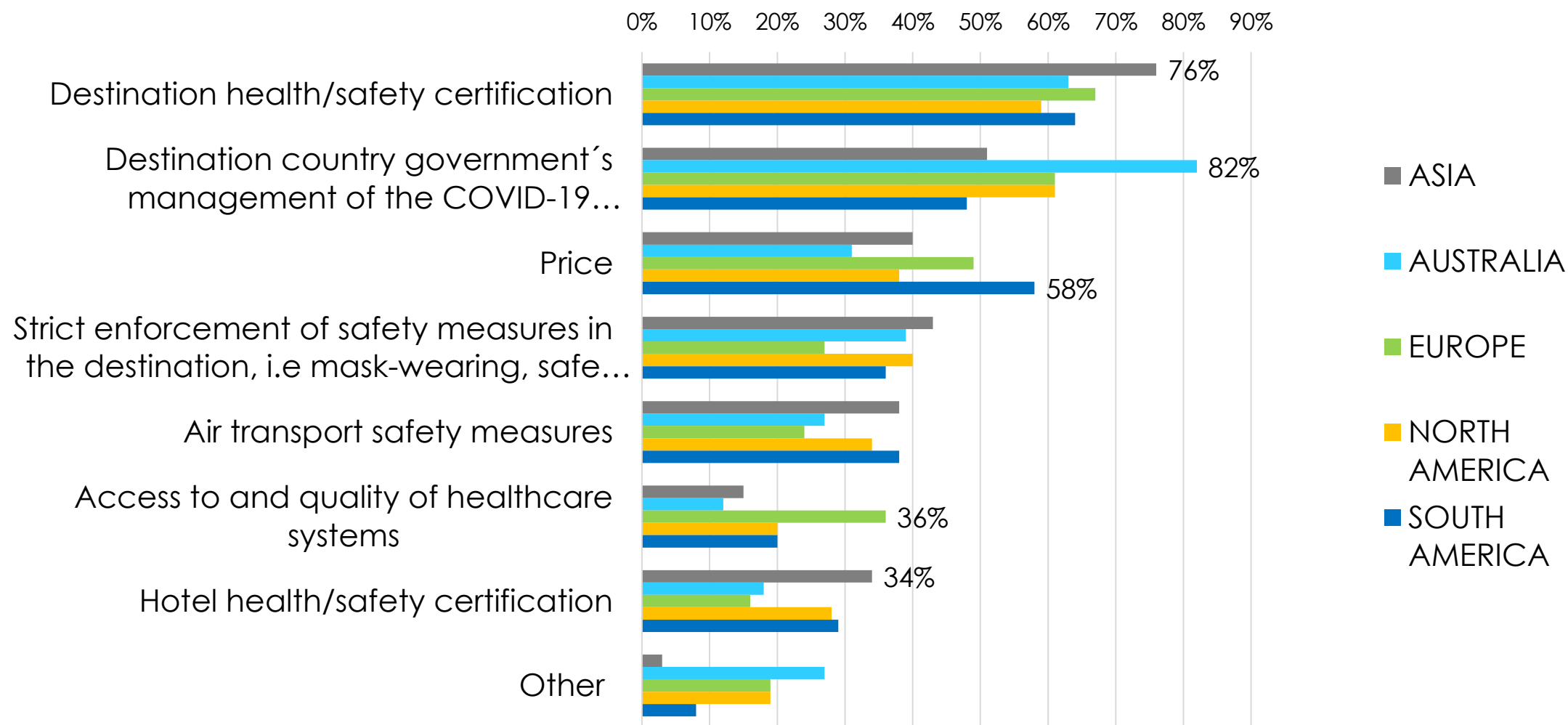
Destination Health And Safety Certification

Price & Access To Healthcare Systems Are Growing Client Considerations



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

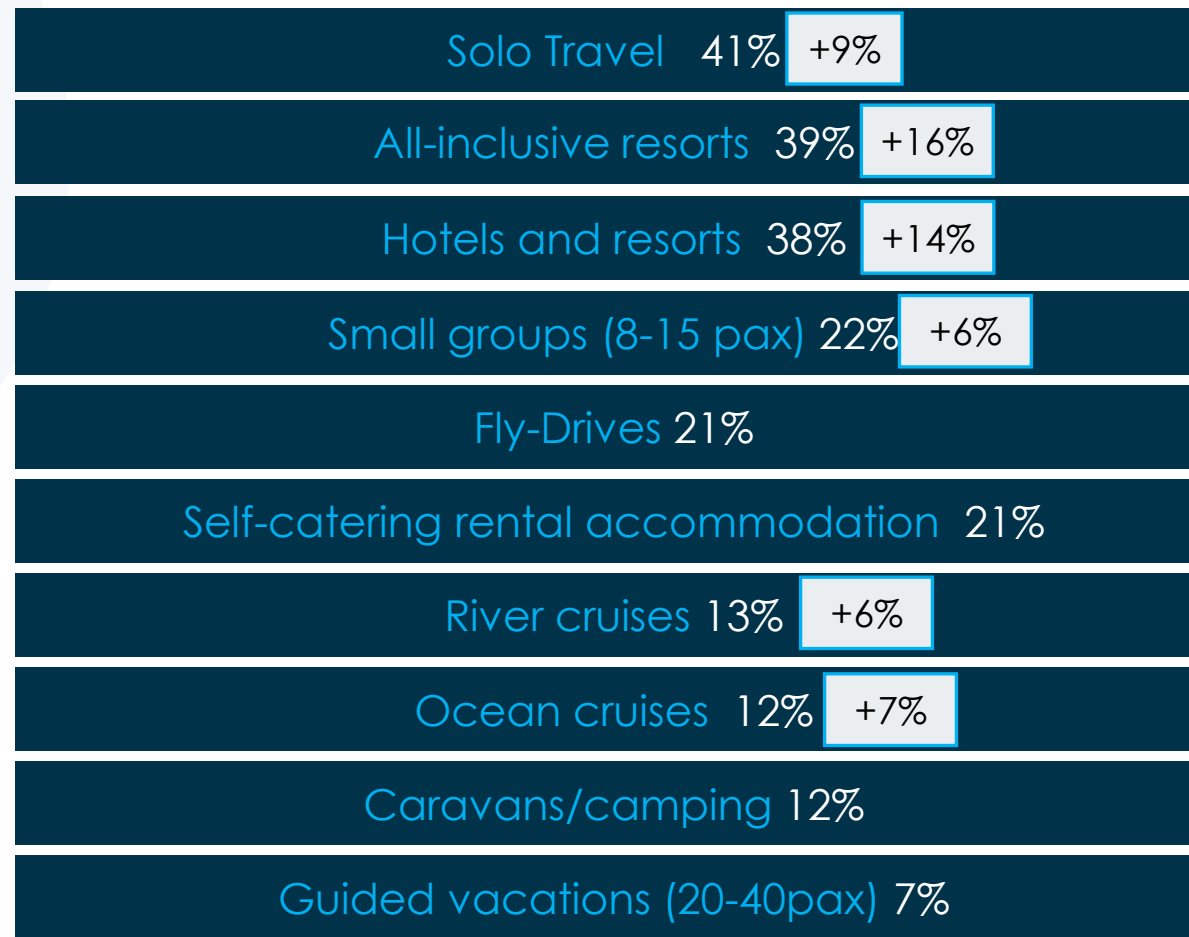
A Continental Comparison



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

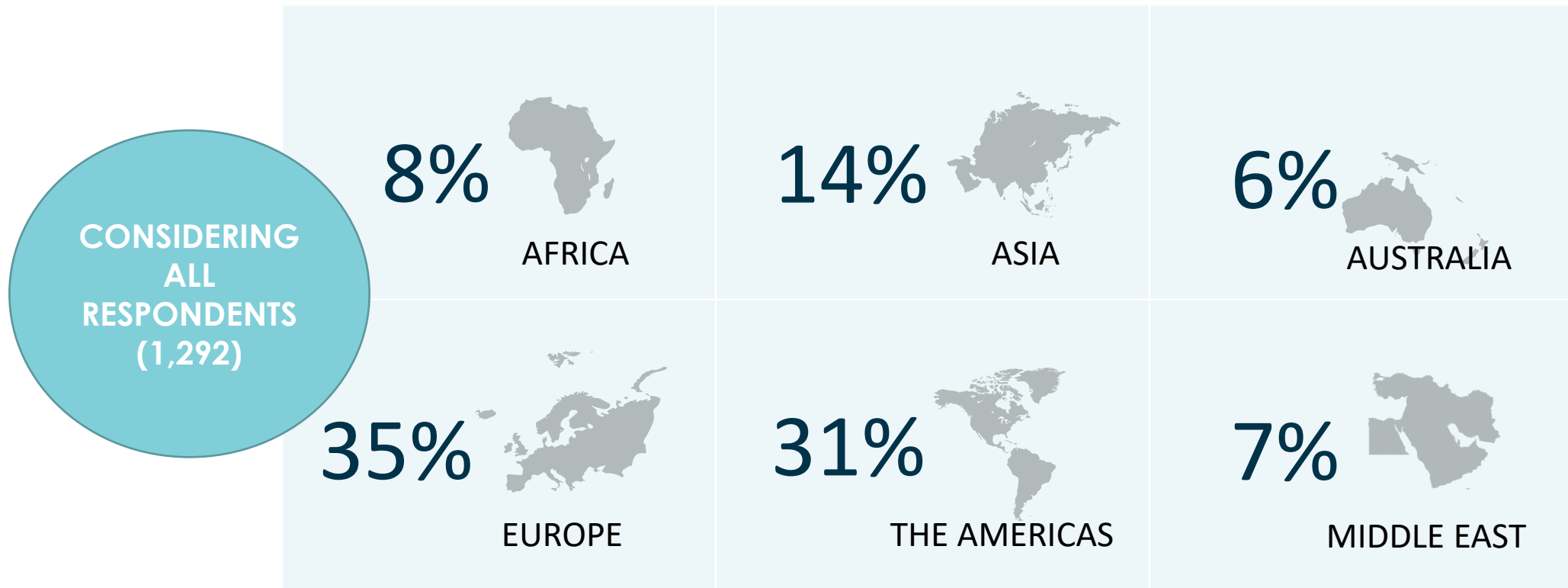
A High Level Of Client Interest Remains In Solo Travel, All-inclusive Resorts And Hotels & Resorts

**HIGH
INTEREST**



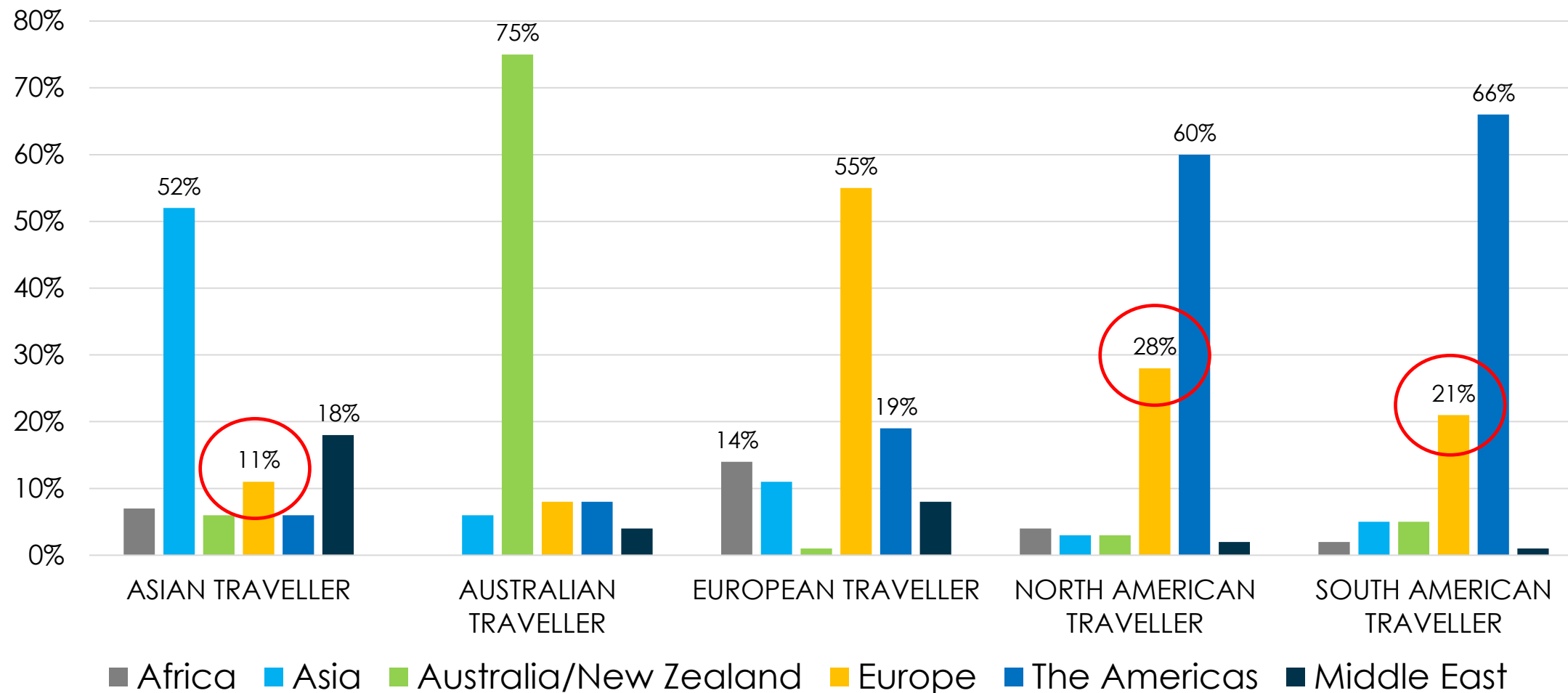
Q11. What is the level of interest in the following products (low, medium or high)?

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
18%	13%	6%

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



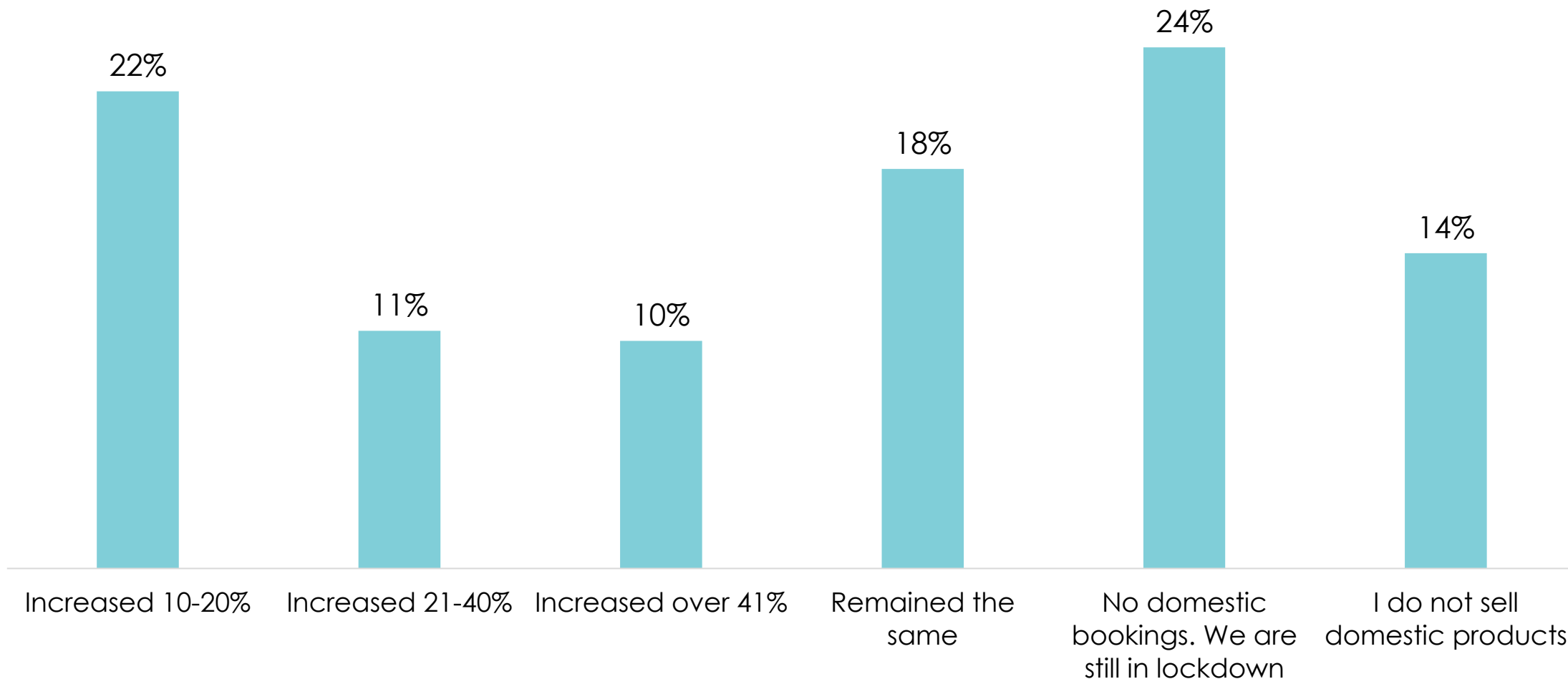
NORTH AMERICA

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

South America	Central America
14%	8%

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

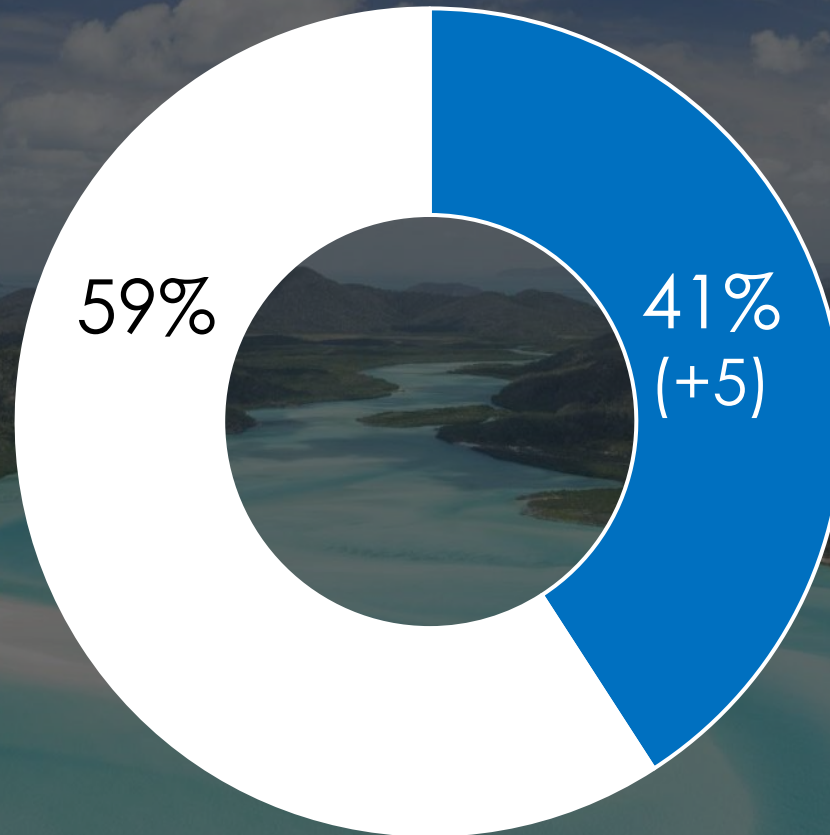
43% Increase In Domestic Travel



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

The perception of the travel season is changing

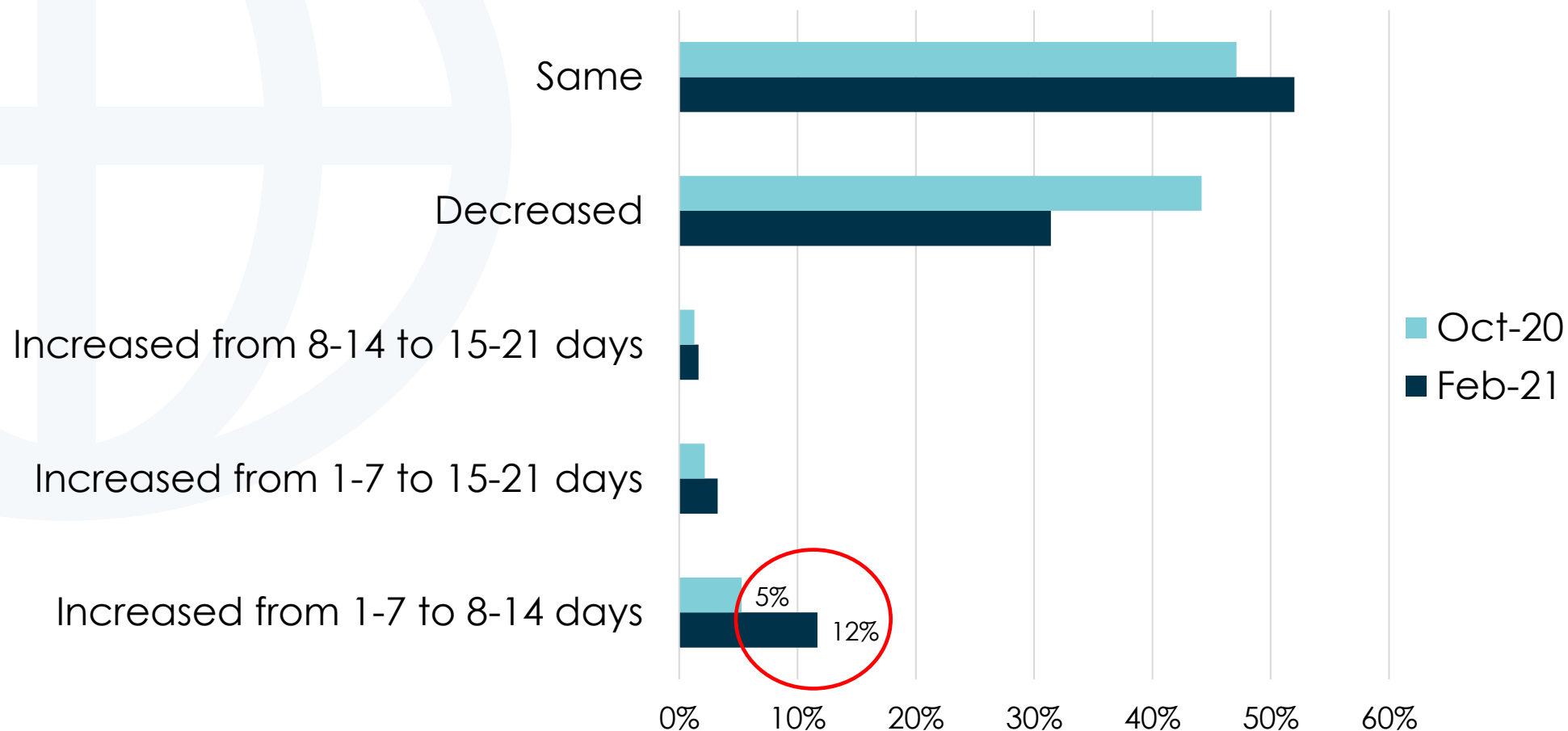
- NO
Travel seasons remain the same



- 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?

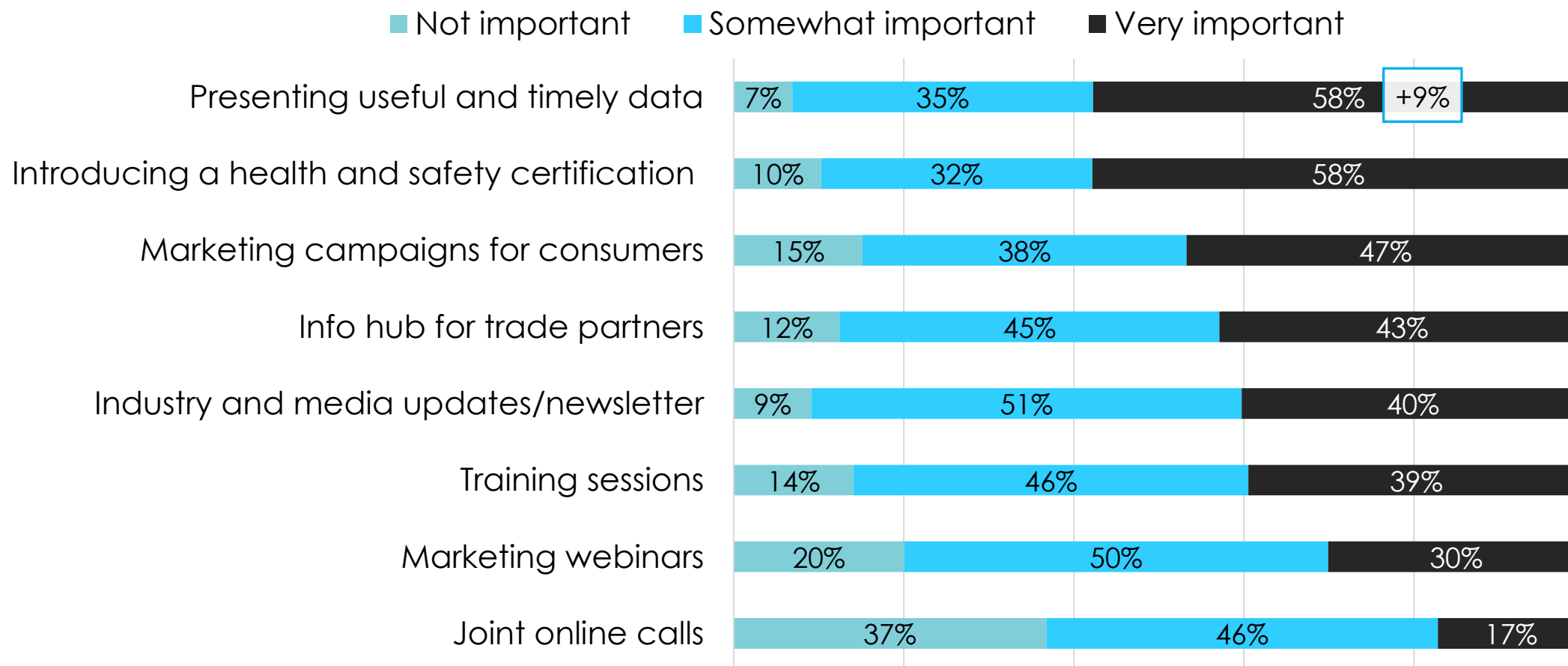


THREE MOST REQUESTED ACTIONS FROM DMOs

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

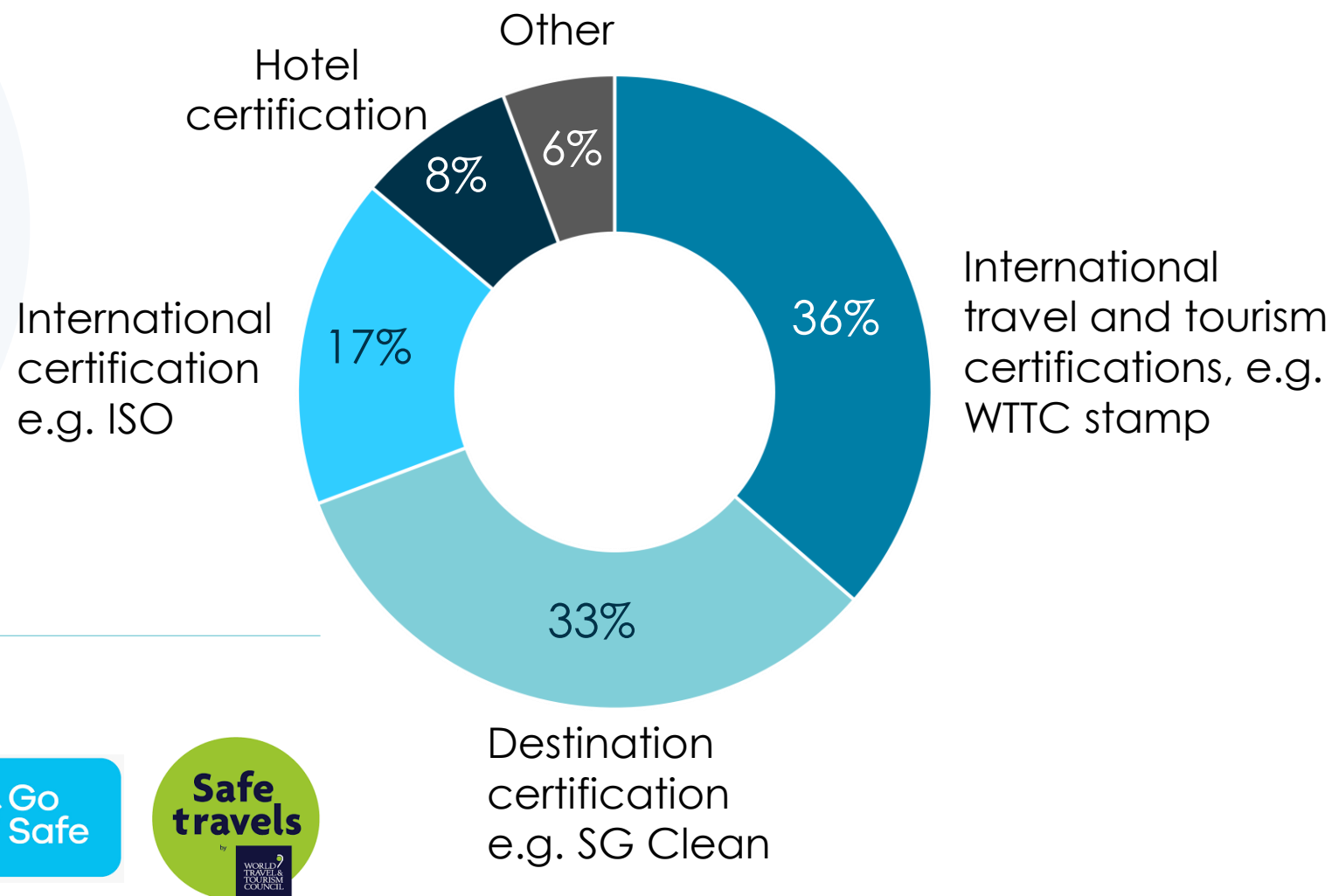
Q18. How important are the following actions that destination organizations can do to help you?

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

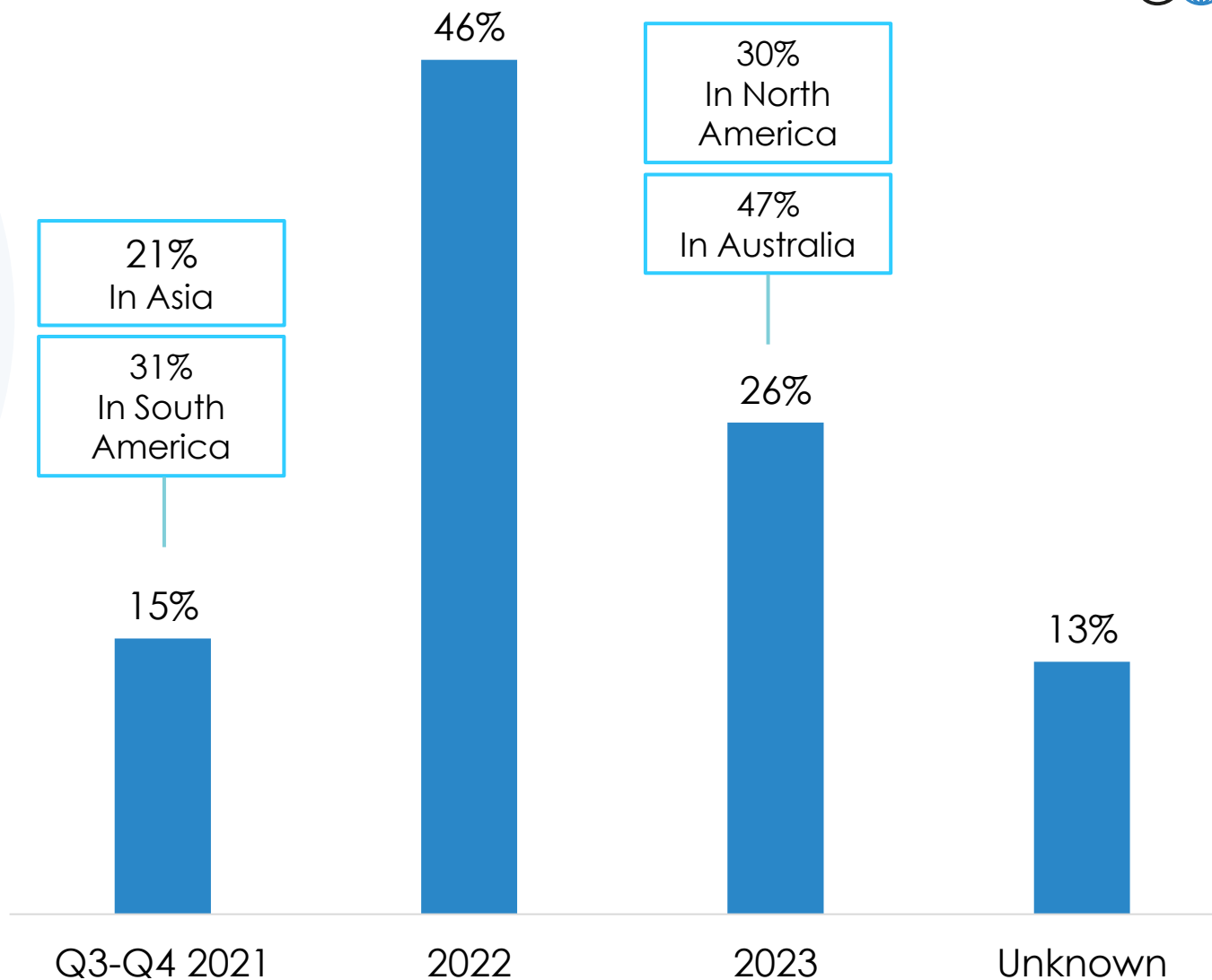


Q18. How important are the following actions that destination organizations can do to help you?



OUTLOOK

Forecast for Pre-Covid Levels

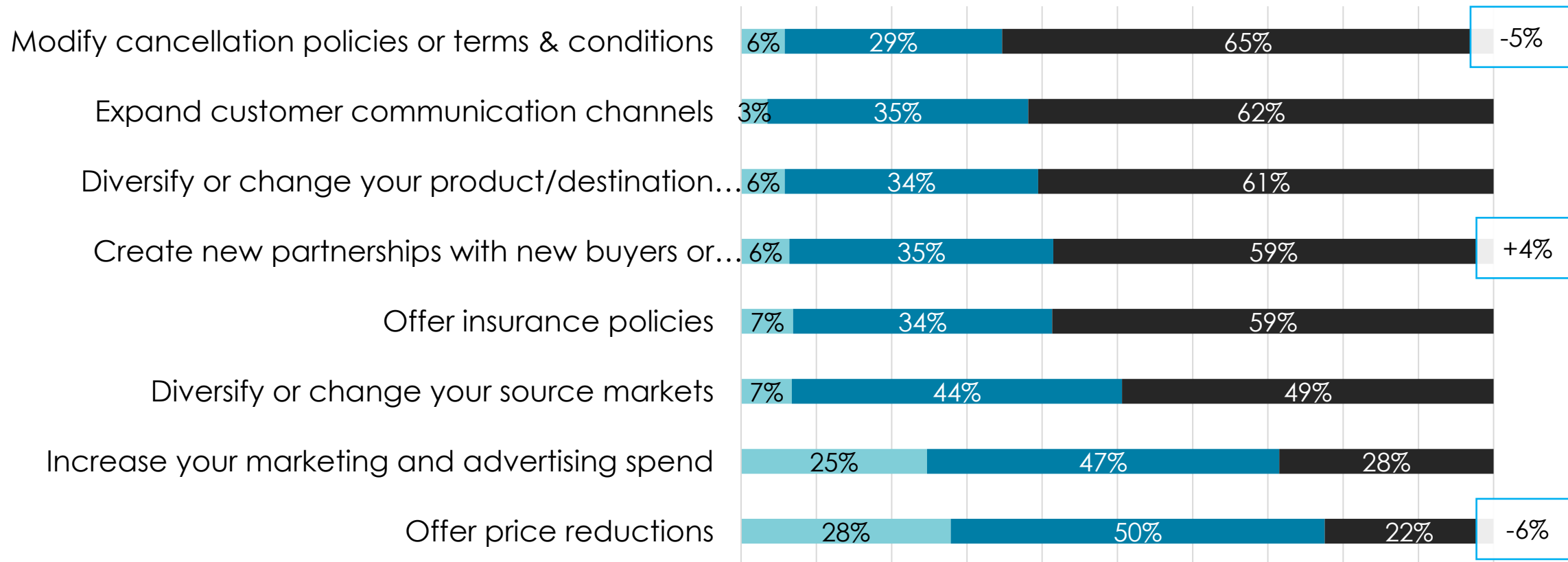


Q20. When do you expect your business to go back to normal pre COVID-19 levels?

Modifying Reservations will be a Major Role

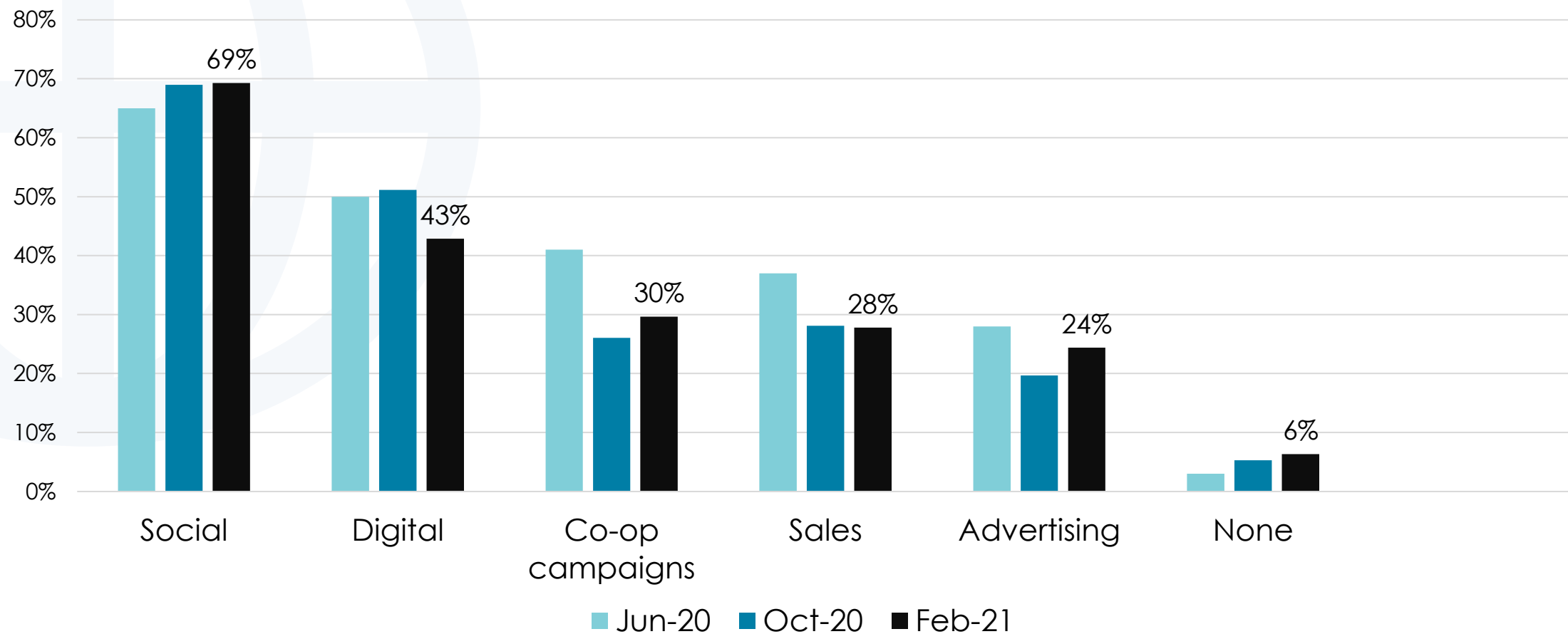
■ Less ■ Same ■ More

Compared
to October
2020



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?

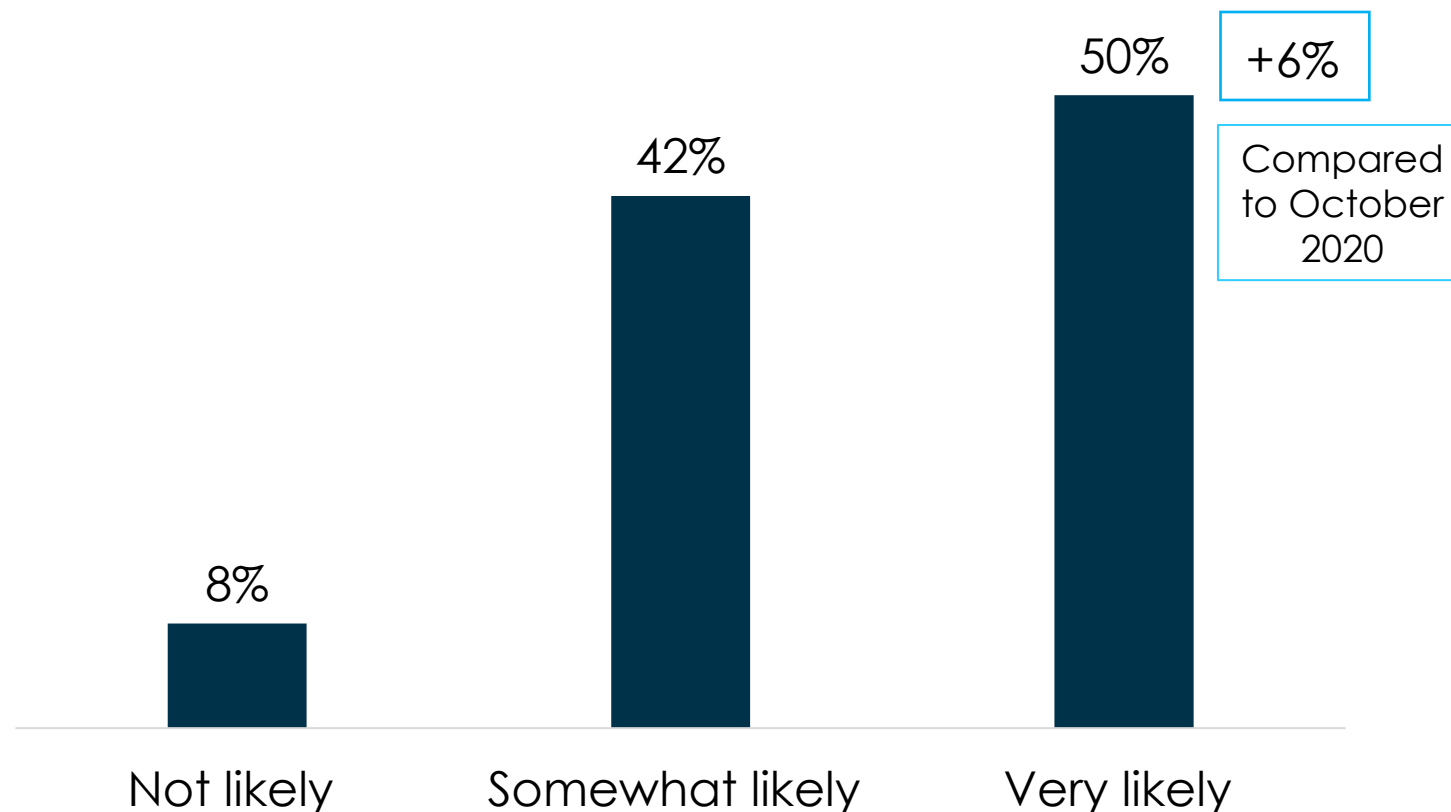
Social Media Continues To Be The No. 1 Marketing Activity



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

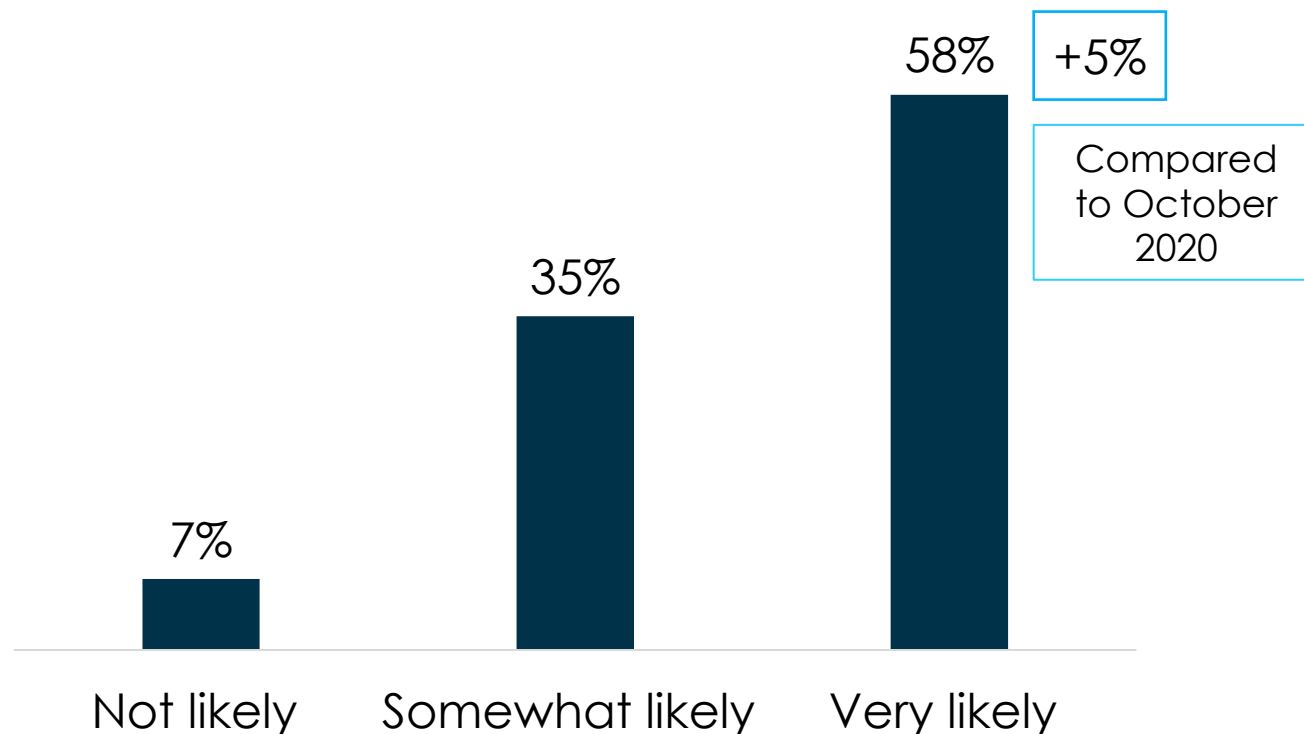


50% Of Global Respondents Are Very Likely To Consider HOTELS & RESORTS Not Previously Offered



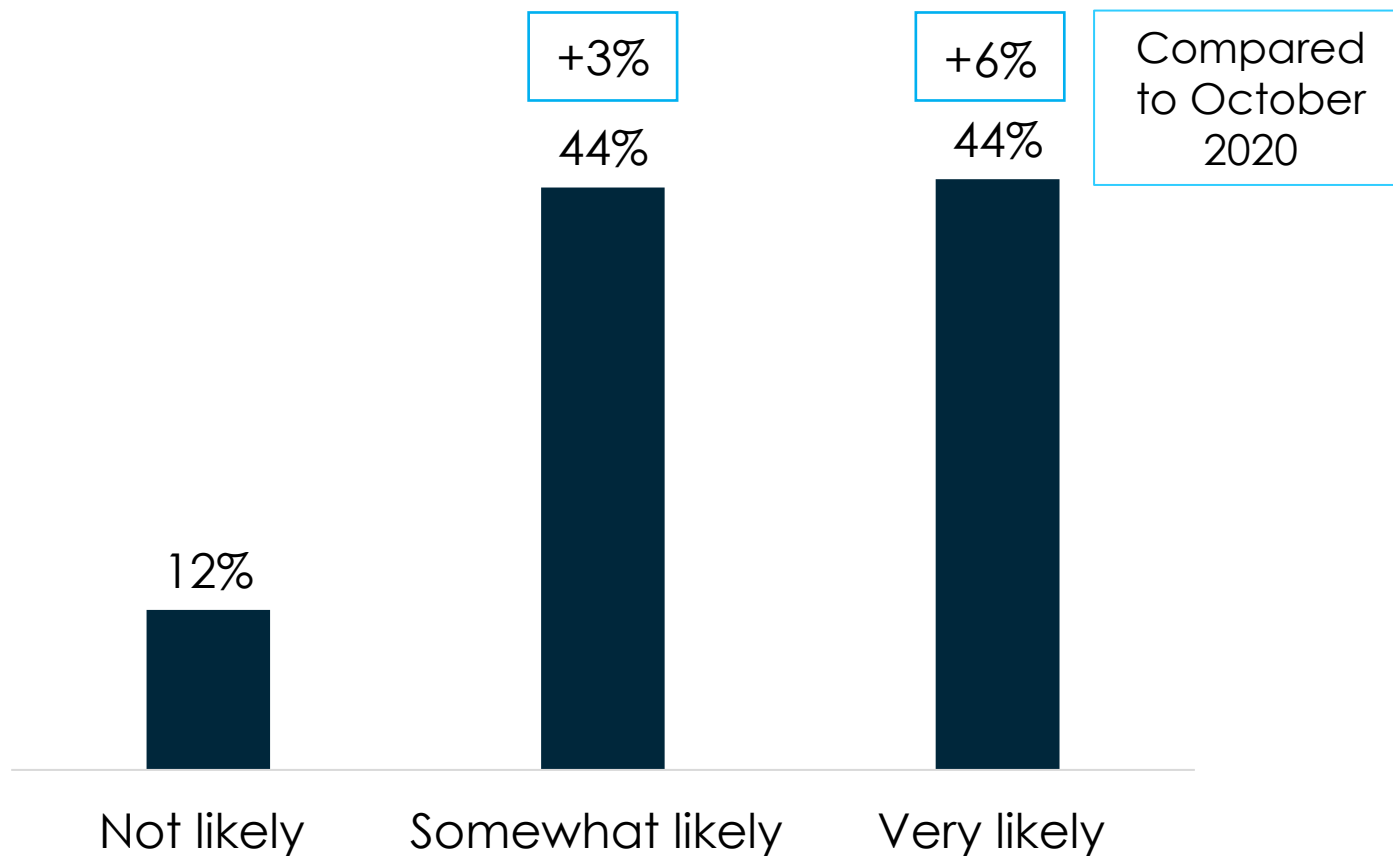
Q23. Will you consider hotels & resorts you have never sold before?

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).

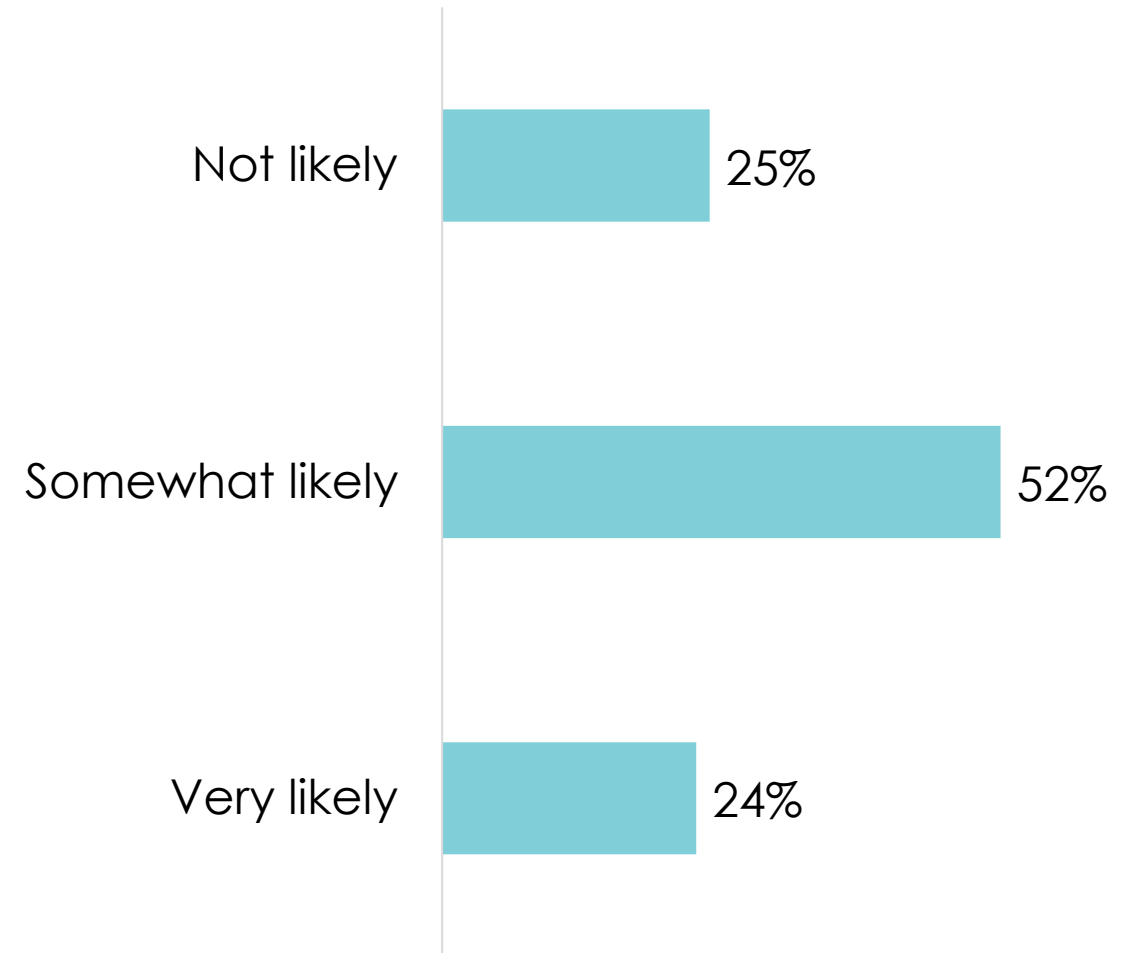
Round III, February 2021

Answered: 790 Skipped: 502

A word cloud visualization of survey responses. The central and largest word is 'CLIENT'. Other prominent words include 'ADVISOR', 'CHANGE', 'DESTINATION', 'MARKET', 'CONSULTANT', 'KNOWLEDGEABLE', 'SERVICE', 'FLEXIBLE', 'CUSTOMER', and 'INFORMATION'. The words are arranged in a circular pattern around the central 'CLIENT' word, with varying sizes and orientations.

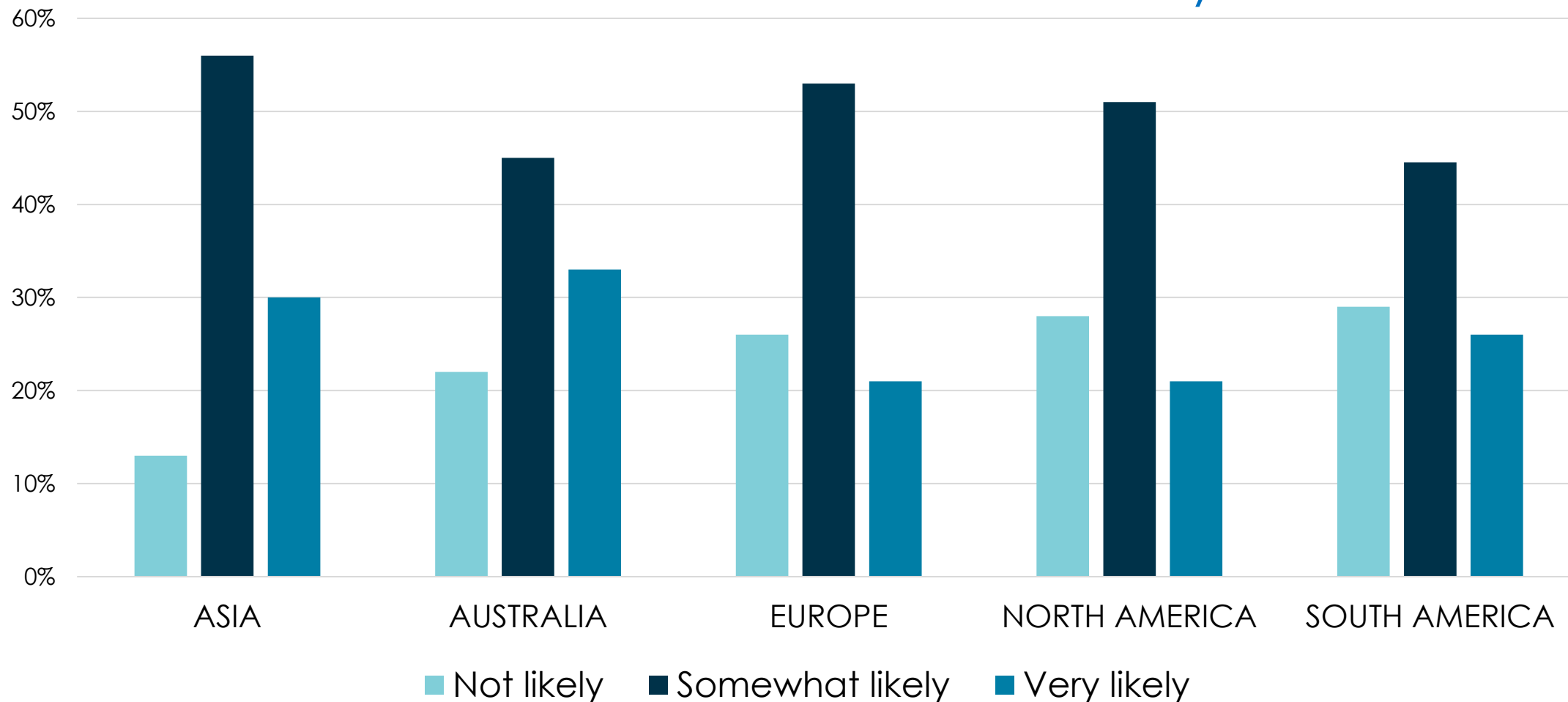
"We will become even more trusted and the "go to" person for all our customer's travel needs"

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



Global

USA | CANADA



In the business of transformation

MEXICO

Interamerican :

SOUTH AMERICA



TRAVEL ADVANCE

CENTRAL EASTERN
EUROPE



Interface Tourism
France

FRANCE



Lieb
Management

GERMANY

AIGO

ITALY



related
Everybody is talking

NORDICS



RUSSIA



Interface Tourism
Spain

SPAIN



Interface Tourism
Netherlands

THE NETHERLANDS



Hills
Balfour

UK



AUSTRALIA



CHINA



buzz travel marketing
managing your destinations' image
CIN U63040DL2004PTC123836

INDIA

PacRim
MARKETING GROUP INC.



JAPAN



THANK YOU

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