Destination X: Where to Next

What Leisure Travelers Want in a COVID-19 World

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1 Executive Summary

To travel or not to travel? Undoubtedly this is one of the top questions millions of leisure travelers around the world are asking themselves, family and peers as they spend hours thumbing through their Instagram and other social media feeds filled with spectacular visual inspiration. As we anticipate the full reopening of our industry, now is the moment for travel sellers and suppliers to more deeply understand what consumers expect and need in order to satisfy their pent-up wanderlust.

A lot has changed since we initiated our first Destination X study in late 2018. The focus of our latest research explores the leisure traveler's mindset towards planning and purchasing upcoming travel amidst the realities of COVID-19. To do this, we solicited the opinions of +8,500 CheckMyTrip users from around the world through a quantitative and qualitative survey. This new global study also reveals the impact of the new reality upon leisure traveler attitudes towards using air, hotel, rail, rental car, insurance and travel agents.

Our research findings show consumers have a healthy appetite for travel despite the ongoing challenges and unknowns that still lie ahead with COVID-19. The study also highlights several key areas of opportunity for the travel industry to rethink, retool, reinvent and rebound higher than ever before.

The majority of travelers are steadfast in their commitment to resume their leisure travels by the end of this year. The question is more about when, where and how they can best do so. From how far, to how long to how often - we see a very clear picture of what travelers are willing to consider at this moment.

Details increasingly matter. The reasons for traveling and the modes by which an individual is willing to travel are even more important in their purchase consideration. Price continues to play a role in decision-making, but other COVID-19 related factors now weigh in as travelers take their time to fully evaluate both their destination and transit options. Customization and personalization are key cornerstones of the trip.

Contingency plans are no longer optional. Travel insurance grows in prominence with young and old. Flexibility to make changes or collect refunds are just one part of the leisure traveler's overall insurance cost benefit equation.

Travel agents are far from passé. Travelers now place a higher premium on problem solving and support, especially for longer journeys. With an array of uncertainties still unfolding, we see the potential for travel sellers to play a bigger role in helping consumers successfully navigate their options throughout all phases of their trip experience to increase confidence.

Knowledge is power. We believe the extensive insights from this study will help you understand more about the minds and hearts of your customers. We hope this information will empower you and your teams to adapt your business strategy, marketing and operations to thrive in the upcoming months ahead.

Champa Magesh

Executive Vice President, Retail Travel Channels
Amadeus

2 Travel Planning is Alive and Strong

For millions of travelers looking at their calendars, it's hard to believe their holidays came and went. After five plus months of challenging lockdowns, many were scratching their heads as previous travel plans were either altered or cancelled.

For some sojourners, the weeks and months ahead are still a big blank when trying to discern what to do with their remaining time off. Are holidaymaker dreams temporarily or permanently on hold?

There is a lot of speculation in and outside of the travel industry around what kind of travel will emerge first once restrictions lift around the world. For many reasons, there is a strong indication that leisure travel is already beginning to appear in various forms. That's why we asked more than 8,500 travelers who regularly use CheckMyTrip to share their views with us on leisure travel planning. Their responses indicate a very healthy appetite in terms of timing as well as the financial means to support their travel aspirations. They also reveal important drivers behind traveler's current motivations and preferences in the next 'new normal' wave of leisure travel experiences.

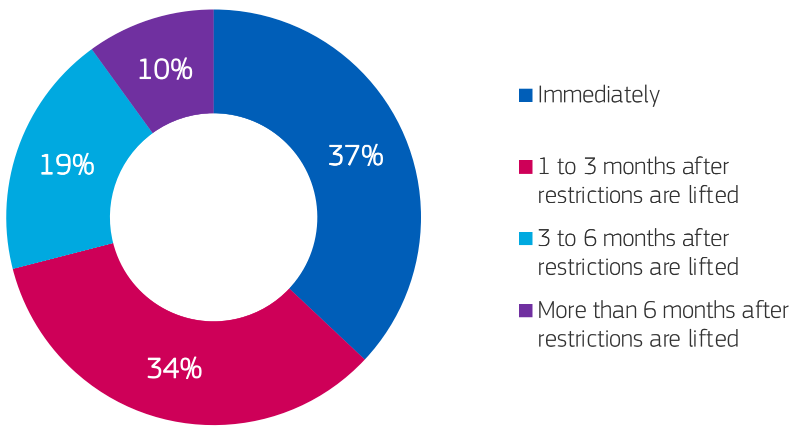
Leisure Travelers exhibit a strong desire and confidence in their financial means to travel in the next three months

Most of us are yearning for the day when we can dust off our suitcases and take to the friendly skies and open roads again. But does the leisure traveler appetite for resuming travel match up with their financial means to do so? The answers in our survey are resoundingly positive.

Nearly **3/4** of global travelers say they would travel within 3 months of restrictions being lifted

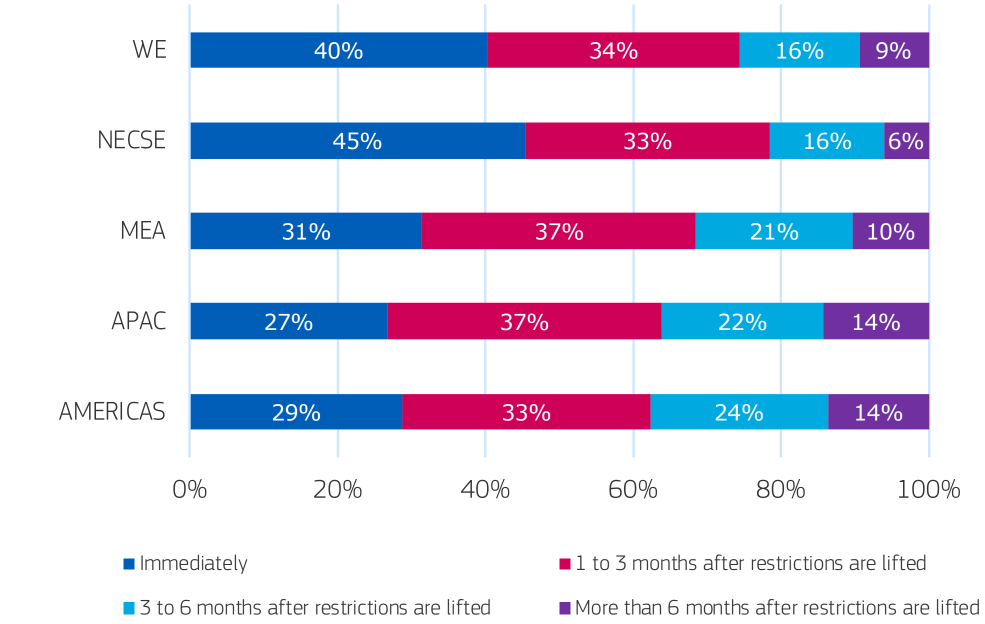
Question: How long are you considering to wait, once the travel restrictions are lifted, to start planning your next trip?

Respondents n=5,785

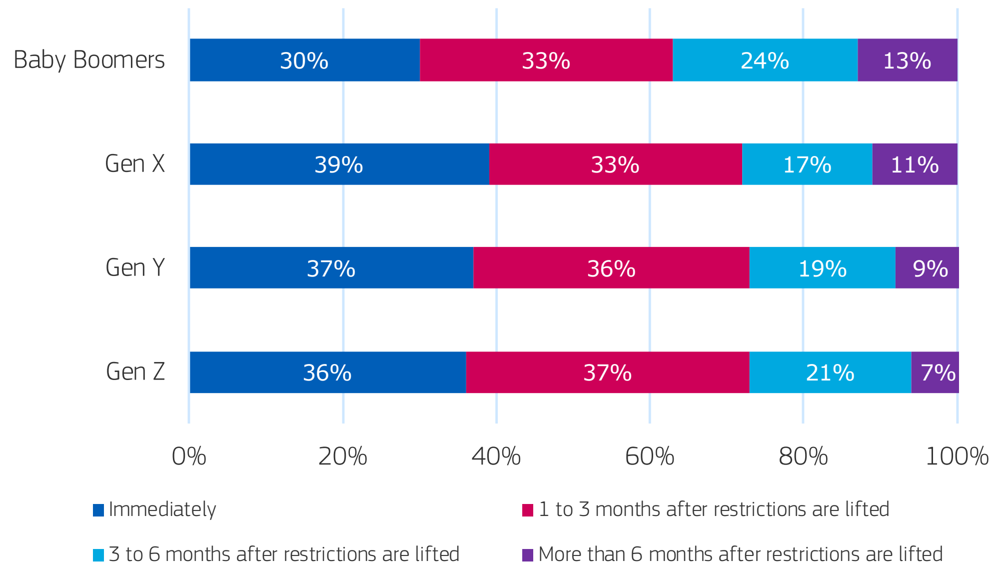


The majority of travelers in our survey intend to go relatively soon after restrictions are lifted.

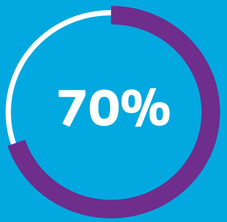
Regional Viewpoints on Next Trip Timing



Generational Viewpoints on Next Trip Timing



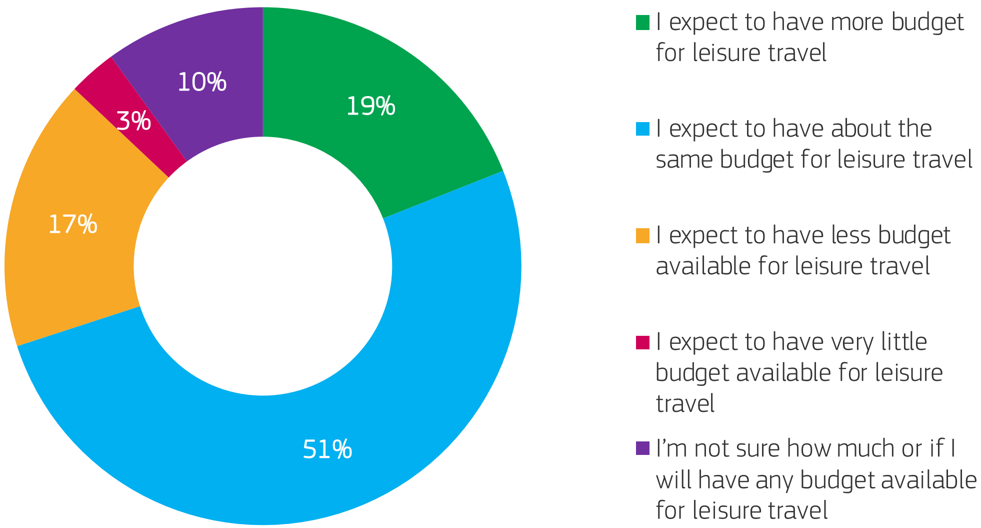
- **Travelers from Northeastern and Central Southeastern Europe (NECSE) say they are most likely to go as soon as the travel restrictions are lifted.** Nearly half (43%) say they would resume travel immediately: the highest of any region we surveyed.
- **Travelers from the Americas (AME) report their desire for a brief waiting period before embarking on their next trip after the travel restrictions are lifted.** Approximately one third say they would prefer to travel between 1-3 months afterwards. Moreover, this group of respondents are one of the most likely sets of travelers to say they prefer to resume travel between 3-6 months after restrictions are lifted.
- **Travelers from Asia Pacific (APAC) are the most likely to say they will opt to go much later after the travel restrictions are lifted.** We observe respondents from APAC are the most likely travelers to tell us they wish to travel no sooner than 6 months after restrictions are lifted. APAC travelers are the least likely of their peers to express a desire to travel mmediately (27%), by a factor of ten when compared to the global average for this category.
- **Baby Boomers are the most likely to say they prefer to resume travel between 3-6 months after travel restrictions are lifted** compared to all other age groups by a factor of five.
- **The other three generations share a closer affinity when it comes to their next trip timing**. At nearly 40%, Generation X is the largest population expressing a desire to travel immediately, followed by Generation Y (37%) and Generation Z (36%).



of travelers say they expect to have the same or more budget available for their holidays

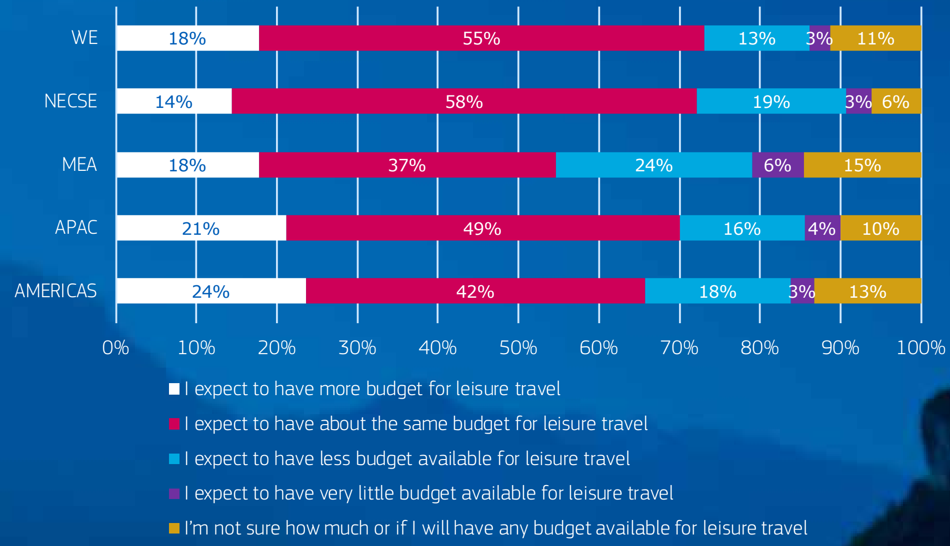
Question: Which statement most accurately REFLECTS YOUR SITUATION THIS TIME?

Respondents n=5,189



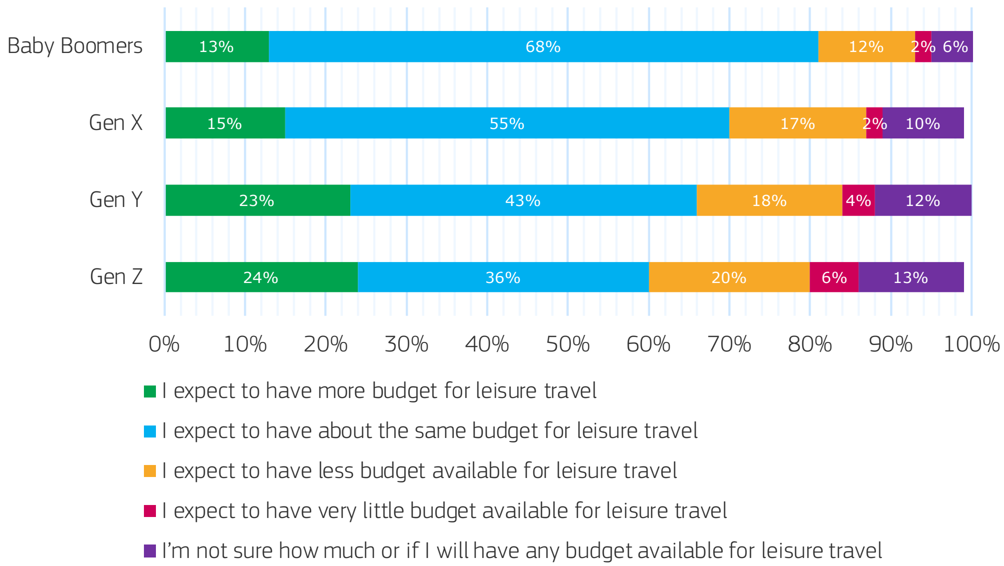
Just over half of our respondents (51%) tell us they expect to have the same budget available for leisure travel. While 1 in 5 of CheckMyTrip users claim they expect to have more travel budget on hand.

Regional Viewpoints on Leisure Travel Budget



- **In Europe, we observed participants from NECSE (58%) and Western Europe (WE) (55%) the most likely of their peers to say they expect to have the same budget as before the start of COVID-19.**
- **Of their peers, CheckMyTrip users from the Americas (AME) are the most likely group to say they expect to have more budget for leisure travel**. Nearly a quarter (24%) of AME respondents say they expect to have more budget compared to 14% for NECSE and 18% for WE.
- **In the Middle East Africa (MEA) region, our survey finds travelers (24%) from this part of the world the most likely to say they expect to have less budget for leisure travel**. Another 15% of MEA travelers say they are not sure how much or if they will have any travel budget.

Generational Viewpoints on Leisure Travel Budget



- **Baby Boomers while more cautious about when they initiate their next trips, are the most financially optimistic**. This generation is the most likely to say they will have the same or more travel budget with the majority of respondents (68%) saying they expect to have the same budget.

- **By contrast, Generations Z and Y are split on expectations about their travel financial means**. They are among the least likely of all traveler age groups to tell us they expect to have the same travel budget (36% and 43% respectively). Gen Z and Y are also the largest groups of respondents to believe they will have less budget available for travel, although nearly another quarter of these generations (24% and 23%) say they expect to have more travel budget.

- **Generation X travelers in our study are solidly in the middle of these two group extremes**. The majority of this age group (55%) maintain same travel budget expectations, with just 15% of them stating they expect to have more available for future travel.

OUR TAKEAWAY

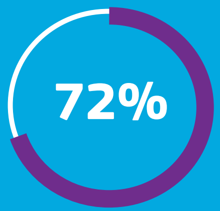
Travel demand is out there. Travel sellers and suppliers must begin positioning their brand and rebuilding their operational muscles to capture the coming wave of leisure travel shoppers.

ASK YOURSELF

- *How well does your agency offering appeal to each traveler generation's timing and financial interests?*
- *Are you able to scale up your operations to engage near-term leisure travel bookers now?*

Leisure travelers indicate a strong preference to go farther from home, for a longer duration and less often

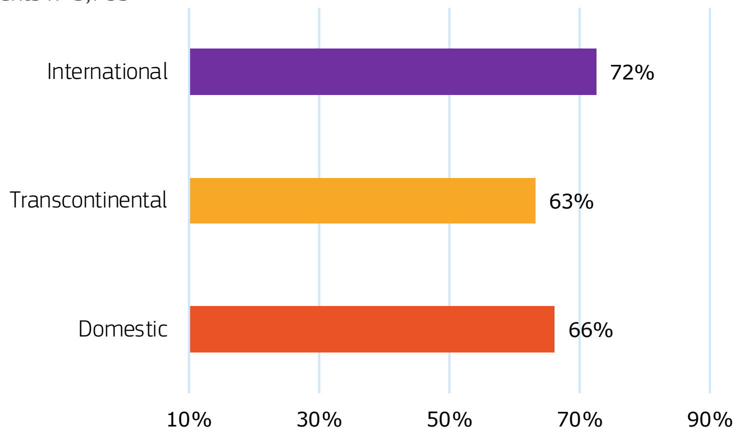
After months of being shut in, some of us are starting to dream about our next holiday getaway. But when it is time to book the trip, are travelers still willing to cross borders and spend significant time away from home? How often will travelers go to satisfy their wanderlust in the coming year? Our survey reveals interesting preferences between leisure travel distance, duration and frequency.



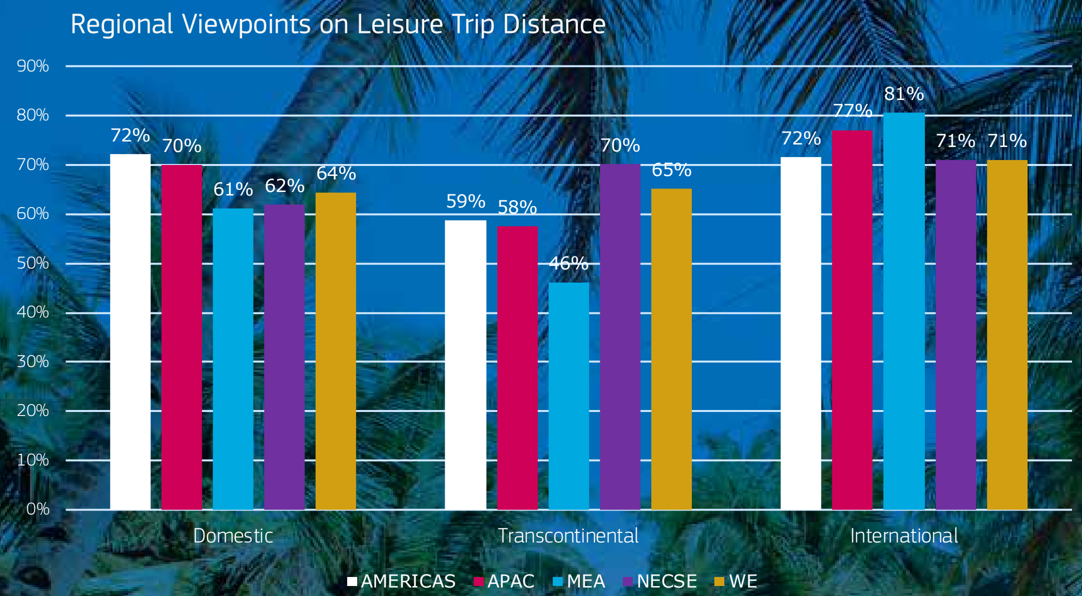
of travelers say they would consider resuming international travel

Question: Which of the following would you consider once the COVID-19 travel restrictions are lifted?

Respondents n=5,785

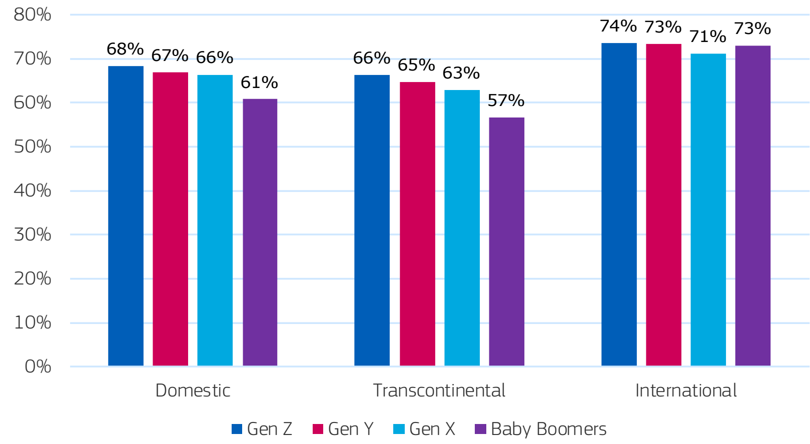


Out of the three travel distance ranges (domestic, transcontinental and international), of global travelers who said 'yes', the majority did so for international, followed by domestic and transcontinental options. For purposes of our survey, 'domestic' is defined as "within one's own national borders"; 'transcontinental' is defined as "across national borders, but within one's own continent" and 'international' defined as "traversing across continental borders".



- **For those who said 'yes' to international journeys, both APAC and MEA respondent groups were the two most likely to do so (77% / 81% respectively).**
- **When it comes to domestic oriented travel, travelers we surveyed in the AME are the most likely of their peer groups to say 'yes'. Travelers in MEA and NECSE regions are less likely by a factor of four to five to say 'yes' to this type of travel.**
- **In the context of transcontinental trips, both APAC and MEA are the most likely groups of travelers to respond 'no' to this option. 70% of travelers in NECSE travelers on the other hand are among the most likely of their peers to say 'yes' to this option.**
- **Interestingly, we observe an equal distribution of survey respondents saying 'maybe' to all three options across the regions (between 17-21%).**

Generational Viewpoints on Leisure Trip Distance

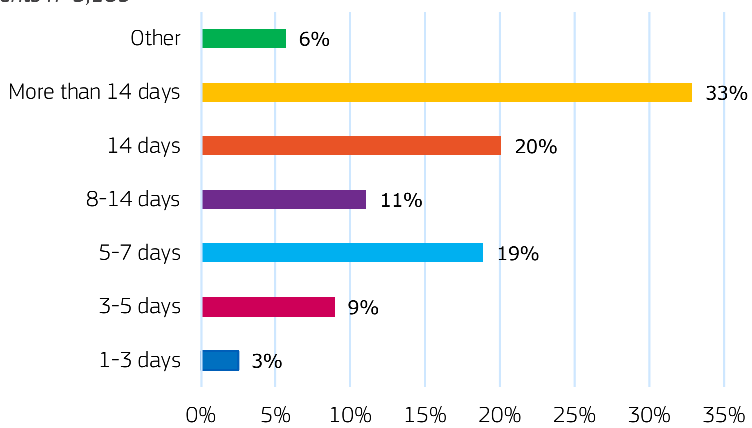


- Baby Boomers are the least likely of the generations to say ‘yes’ to domestic trips (61%) and to transcontinental travel (57%). When it comes to international journeys, Baby Boomers are just as likely as the other generations to say ‘yes’.

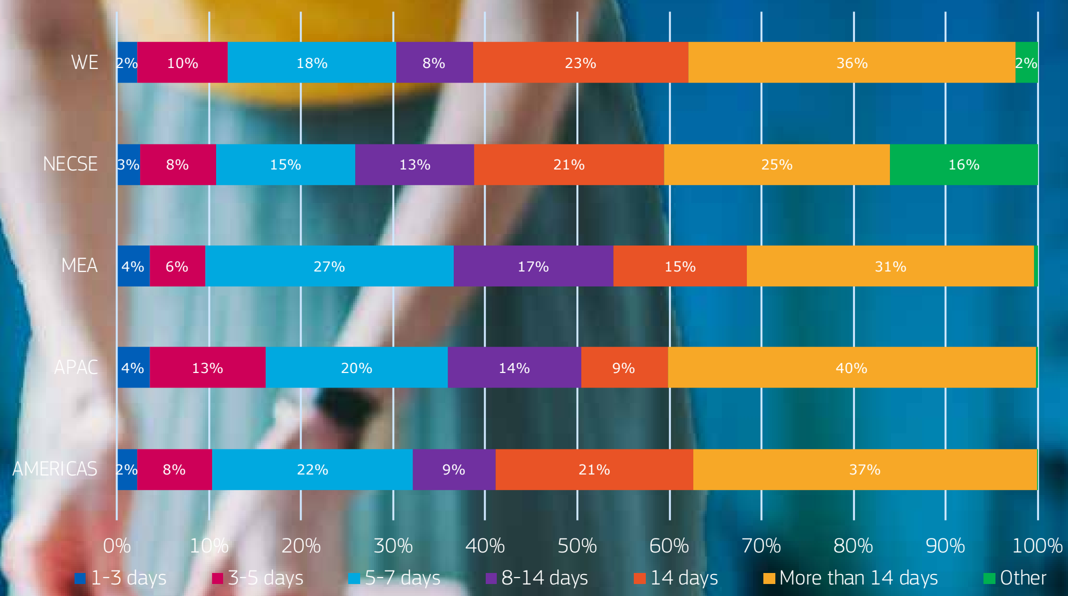
1/2 of global travelers are seeking a longer trip duration of 14 days or more

Question: For HOW LONG are you considering traveling during your future trips?

Respondents n=5,189

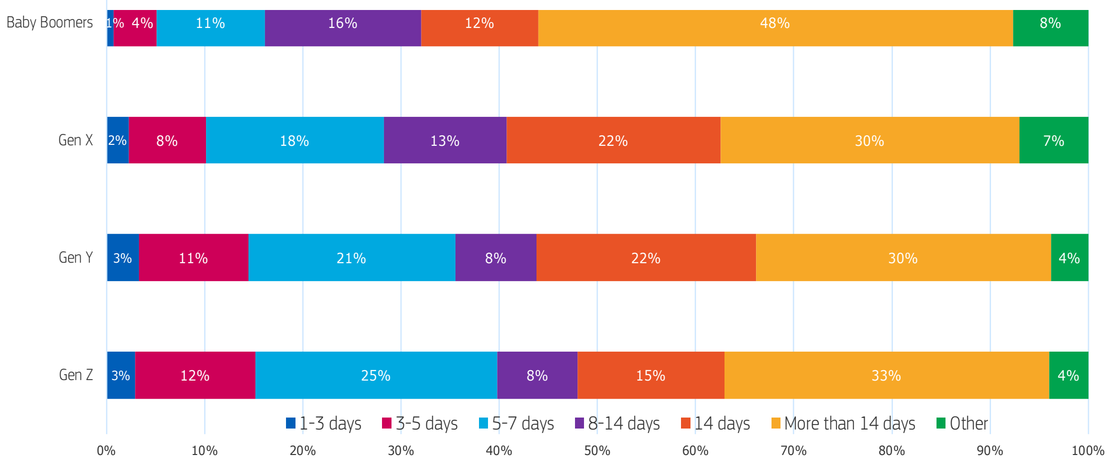


Regional Viewpoints on Leisure Trip Duration



- **Travelers hailing from AME and MEA are the most likely of their peers to say they are considering longer extended trips of more than 14 days in length (37% and 40% respectively). NECSE travelers on the other hand, were the least likely of their peers to consider this length of trip (only 25%).**
- **Of travelers who say they are most likely to opt for a moderate holiday break, MEA respondents also topped this category (44%).**

Generational Viewpoints on Leisure Trip Duration



- **Baby Boomers are among the most likely to consider a long-extended trip compared to the other three generations in our survey**. More than half (48%) say they are considering trips of 14 days or more – exceeding the global average by a substantial fifteen percentage points.

- **Generation Z respondents (24%) are most likely to prefer a more moderate holiday break type of trip**. This generation said 'yes' by a factor of six percentage points compared to the global average.

60% of global travelers now expect to take only a few trips per year

Nearly two thirds (60%) of our survey respondents say they will likely consider taking only 1-3 trips per year. While just over a quarter say they are considering 3-5 trips per year. The remaining 15% of travelers indicate a willingness to consider more than five leisure trips annually.

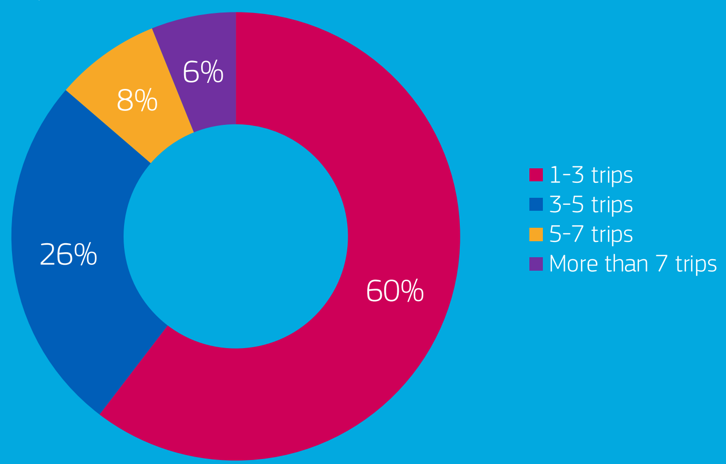
DID YOU KNOW?

Who are the most likely regional and generational groups to say they will only take 1-3 trips per year?

AMERICAS (69%)	**MIDDLE EAST/ AFRICA (68%)**	**GENERATION Z (67%)**

Question: HOW MANY leisure trips are you likely to take on a yearly basis (the highest frequency you feel comfortable with)

Respondents n=5,189



OUR TAKEAWAY

Travelers are keen to go and immerse themselves abroad. Travel sellers and suppliers should focus on helping their customers navigate the new realities and make the most of their time and financial travel investment.

ASK YOURSELF

- *Do you have a strategy to offer a more consultative service to a larger scale of travelers, focusing on referral instead of purchase frequency?*

- *Are you able to adjust your operations and enter partnerships to diversify your offerings abroad?*

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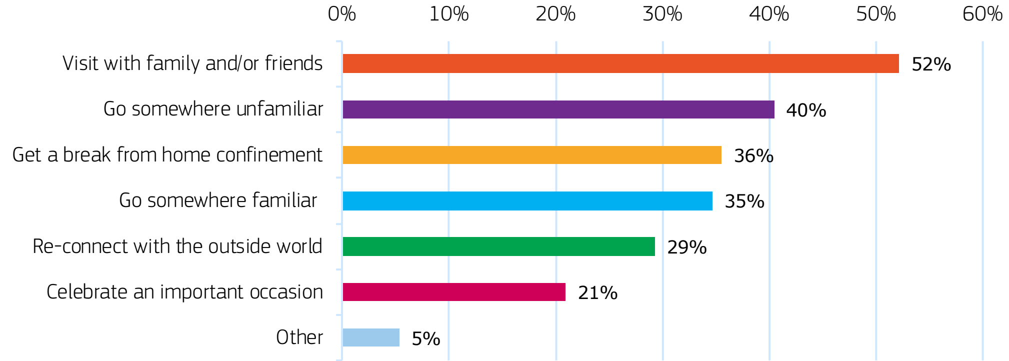
Relationships are a significant driver fueling global travelers' desire to resume their travels

For many, travel is a means to enhance their passions, people and favorite pastimes. As people around the world ponder their first trips in the new normal world, what will motivate them most? Are they seeking the comfort of the familiar or will their sense of adventure and thirst to explore the unknown win out? Our findings illustrate a keen interest to physically reconnect with people whether in familiar or unfamiliar surroundings.

Question: What reasons would cause you to plan and book LEISURE travel in the coming months?

Respondents n=5,785



52% of global travelers say visiting family and friends is the primary reason for their next leisure trip

Reconnecting with family and friends is the predominant reason for 52% of global travelers planning to book a leisure trip after travel restrictions are lifted. Another 21% say that celebrating an important occasion or life milestone with others was the primary reason for traveling.

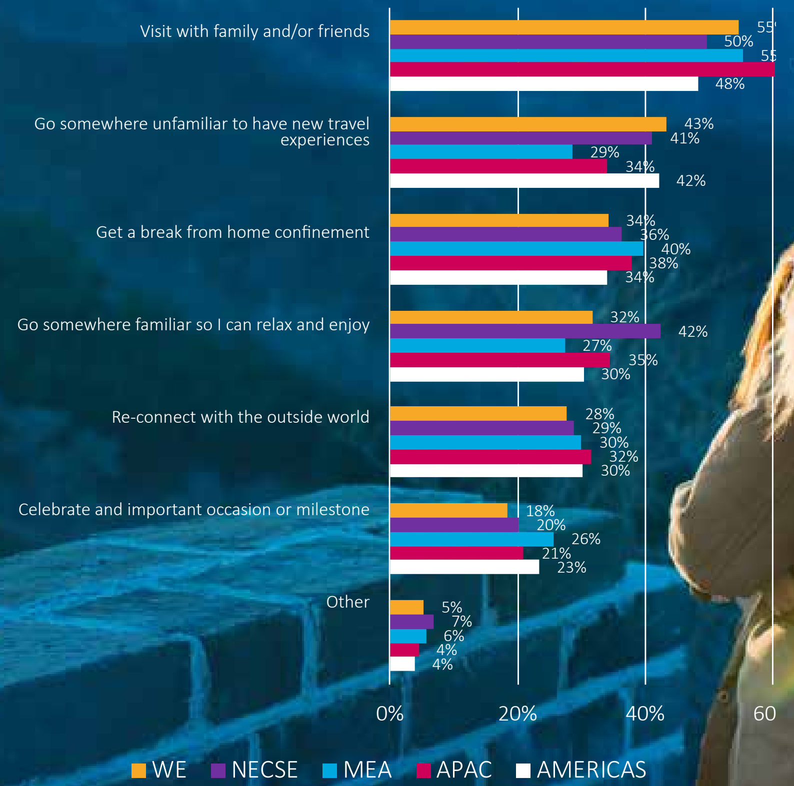
At the same time, we see that travelers seeking a sense of adventure experience (40%) was slightly preferred over their desire for a familiar and relaxing destination experience (35%).

Regional Viewpoints on Primary Reasons for Next Leisure Trip

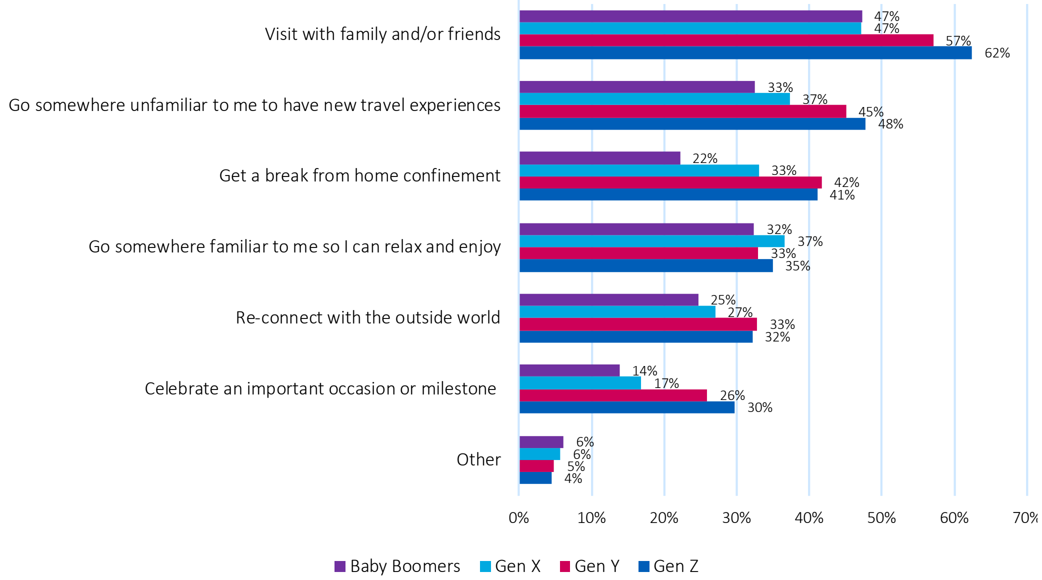
APAC travelers are the most likely group to say family and friends are the main reason for their next trip. While travelers from MEA are the most likely and largest population in our survey to say celebrating an important occasion or milestone as their primary reason for travel.

Respondents from NECSE (42%) are most likely to opt for destinations that are familiar and relaxing.

While those from AME and MEA are the least likely groups to prefer familiar destinations for their next trip.



Generational Viewpoints on Primary Reasons for Next Leisure Trip



Generations Z (52%) and Y (57%) lead the charge when it comes to citing the desire to visit family and friends as their main motivator to travel. They are also the most likely to say celebrations with others as a chief reason for their upcoming travels. These same two generations are also the most likely group to opt for destinations that are unfamiliar to them.

OUR TAKEAWAY

Relationships rule. Travel sellers and suppliers should tap into the psychology driving today's leisure traveler and seize opportunities to package appealing travel solutions around reconnection with family and friends and postponed celebrations.

ASK YOURSELF

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- *Do you have digital capabilities to mine, capture and respond to leisure traveler intent?*
- *Are you considering cultivating specialists within your operations to respond to different travel niches?*

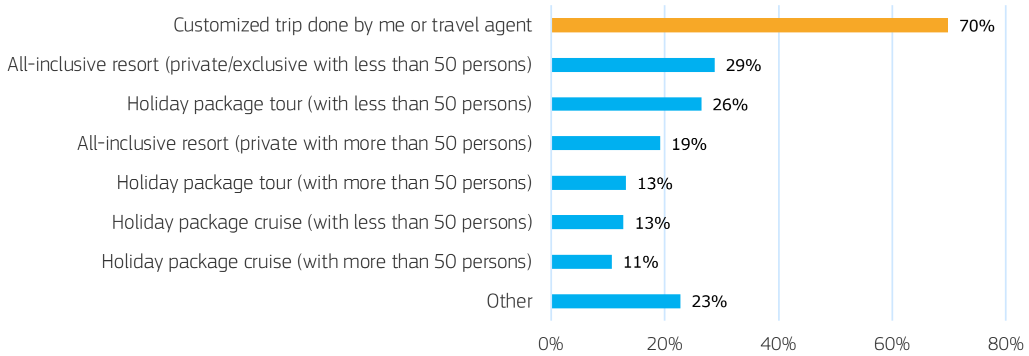
of global travelers say they are open to custom travel experiences that they or travel agents design

Tailored travel experiences win out over pre-packaged leisure travel options

What to do, where to go once travel fully opens up again? This is the question that many travelers are wrestling with as they eagerly look ahead. Will they continue to engage with traditionally popular experiences of resorts, tours and cruises? Our survey finds a clear mandate for more tailored travel experiences and packages.

Question: Which type of leisure packaged travel would you consider once the COVID-19 travel restrictions are lifted?

Respondents n=5,952

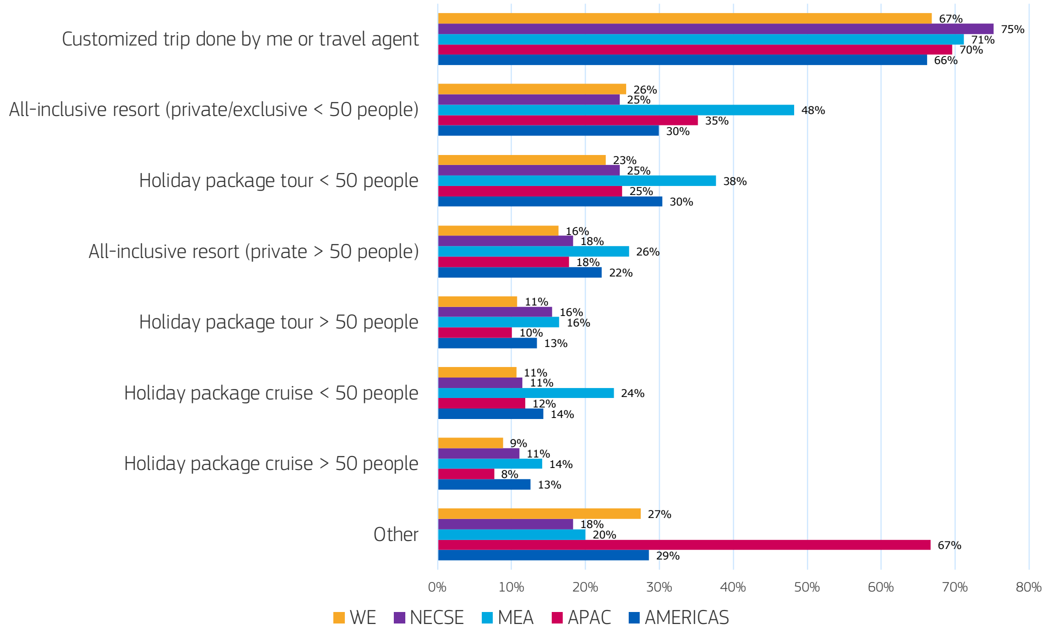


Customized travel by either travelers themselves or by travel agents is by far the most preferred leisure option within our survey. Out of the six leisure travel options presented, only customized travel garnered a higher percentage of 'yes' compared to 'no' or 'maybe' responses.

From the more traditional leisure travel options, all-inclusive private resorts with less than 50 persons ranked 2nd overall with 29% of global respondents saying they would consider this option. Another 26% of our survey population say yes to considering holiday package tours with less than 50 persons as an option for their next getaway.

Traditional package options with more than 50 persons appealed to only a small percentage of our respondents.

Regional Viewpoints on Pre-Packaged Travel Options



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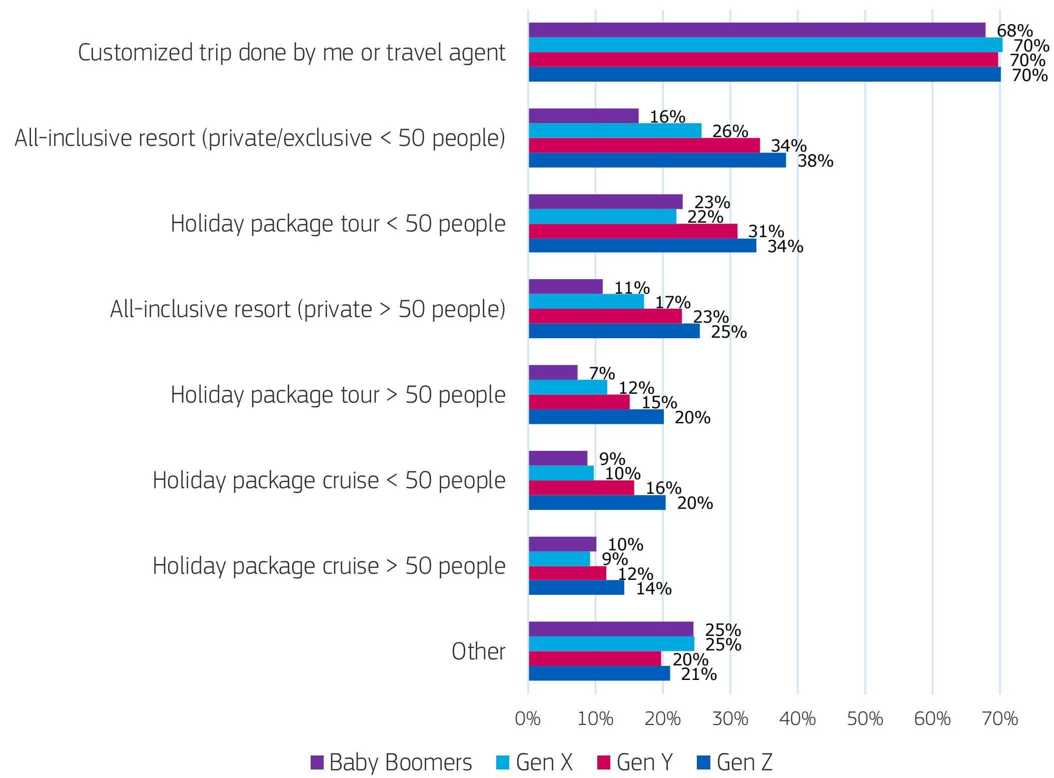
- **NECSE travelers are the largest and most likely of all the regional groups to say 'yes' to customized travel experiences they or a travel agent create.**

- **APAC and MEA travelers are most likely to respond favorably to considering all-inclusive private resorts with less than 50 persons as a viable leisure travel option for their next trip**. However, over half of European travelers (both NECSE and WE) say 'no' and are the most likely groups not to consider this option. When presented the option of considering a private resort with more than 50 persons, only MEA travelers are the most likely group to continue saying 'yes'. For the remaining options, MEA respondents continue to be the singular most likely group of their peers to say 'yes' to both holiday package tours and cruise package options.

Generational Viewpoints on Pre-packed Travel Options



- **Boomers are the most likely age group to say 'no' to nearly every traditional leisure travel option**. The majority of Boomers (68%) say they would consider a custom package they or their travel agent create. At 23%, the next most preferred option for consideration globally by Boomers is the holiday package tour with less than 50 people.

- **Conversely, Generation Z are the most likely to say 'yes' to several traditional leisure travel options**. Despite favoring customized travel the most (70%), Gen Z'ers are also willing to consider all-inclusive private resorts with less than 50 people are considered by 38%, but their consideration drops to 25% when the option factors in 50 people or more at a resort. Gen Z also are equally the most likely of the age groups to say 'yes' to holiday package tours with more than 50 people and cruise packages with less than 50 people.

OUR TAKEAWAY

Travelers want more control over their travel. Travel sellers and suppliers should proactively engage prospective bookers with information and support to help shape and tailor the travel offer as much as possible.

ASK YOURSELF

- *How much does your shopping experience facilitate your travel client's ability to customize certain aspects of their leisure trip?*

- *Are you able to pivot your travel offerings to respond to more custom needs and train your staff to overcome traveler hesitations to certain standardized package options?*

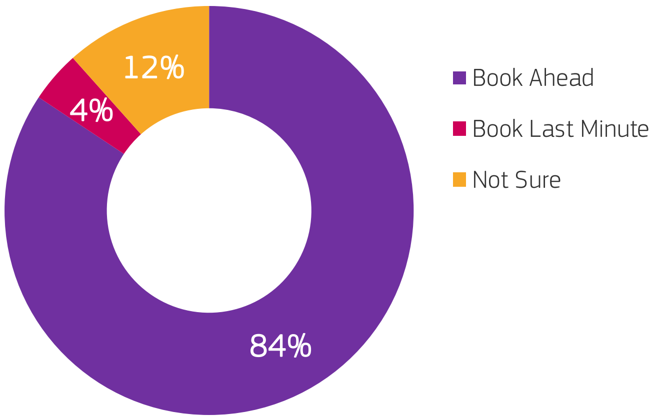
Most travelers expect to plan well ahead of purchasing their next leisure getaway

Packing used to be one of the most stressful parts of leisure travel planning and preparation. But in today's travel environment, there are additional health, safety as well as governmental concerns factoring into holiday purchase decisions. What does the new travel reality mean for traveler spontaneity? How agile and flexible do they expect to be? Our survey results around this aspect of travel planning may surprise you.

67% of global travelers say they need to plan and book their next trip at least one month in advance

Question: HOW MUCH TIME will you need to plan and book your future leisure travel in the coming months?

Respondents n=5,189



The majority of travelers (83%) in our survey choose to plan and book the holidays ahead by at least seven days. The highest concentration of this group (29%) tell us they prefer to make their travel purchases between 1-3 months in advance, while just under a quarter (24%) opt for a slightly longer 3-6 months purchase window. Travelers choosing to either plan and book 6 months and beyond or within 7-30 days of travel are evenly split (14% and 16% respectively).

Only 4% of our respondents say they would consider a 'last minute' booking of less than 7 days. While another 12% say their purchase timing is dependent upon the status of COVID-19 or type of holiday.

DID YOU KNOW?

Who are the most likely regional and generational groups to plan and book ahead versus last minute?

AMERICAS

Most likely to say they prefer to plan and book **3-6 months** in advance

BABY BOOMERS

Most likely to say they prefer to plan and book **+6 months** in advance

MIDDLE EAST AFFRICA

Most likely to say they prefer to plan and book **7-30 days** in advance

GENERATION Z

Most likely to say they prefer to plan and book **1-3 months** in advance

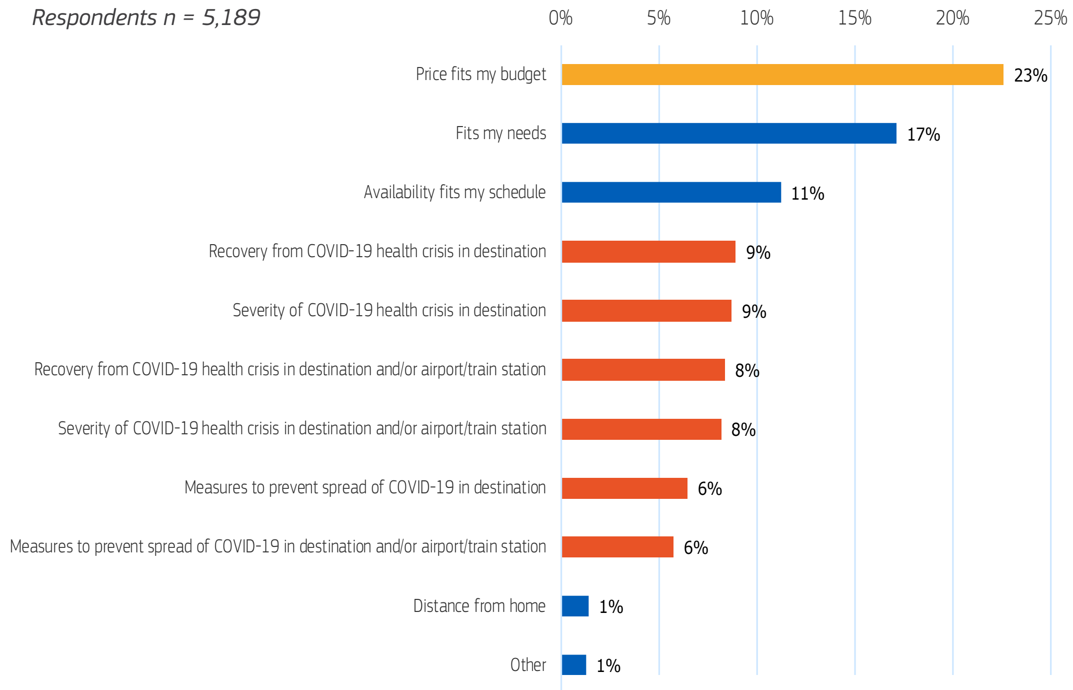
Some travelers still view price significantly, but COVID-19-related factors are now influencing their destination choices

Deciding where to go on holiday is not as straightforward in these very fluid and uncertain times. To what degree will COVID-19 now influence a traveler's choice of destination?

Nearly **1/4** of global travelers say price is the single most influential criteria for selecting their next leisure destination

Question: Which of the following factors would MOST INFLUENCE your choice of destination?

Respondents n = 5,189



OUR TAKEAWAY

Forget flash sales – most travelers will seek thoughtful guidance over a period of time before they book their next getaway. Travel sellers and suppliers will need to incorporate a continuous multi-touch, multi-channel means of nurturing and shaping their customer's future leisure travel purchase decisions.

ASK YOURSELF

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- *Are you building compelling "guidance content" that can be steadily applied at each stage of your traveler's travel purchase decision?*
- *How are you equipping your staff to engage with both prospects and loyal customers across digital and offline channels to plan and book their next getaways?*

47%

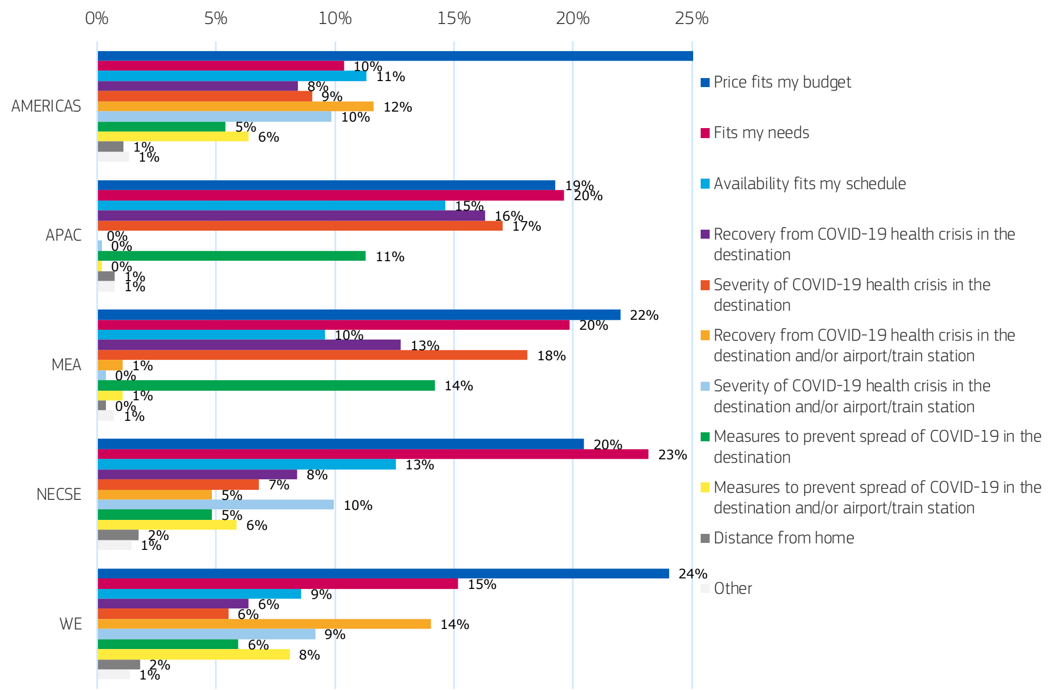
of global travelers cited a COVID-19 related factor as the most influential criteria in choosing a destination

Price ranked as the most influential factor in destination decisions (23% of global respondents), followed by 'Fits my needs' (17%) and 'Availability fits my schedule' (11%). Combined, just 51% of global travelers cited these three non 'COVID-19' related factors as the most influential to their destination decision making.

The other 47% of our global respondents say COVID-19-related information would play the most significant role in their destination decision making process. Interestingly, we observe an even split between those who said the 'Severity' or the 'Recovery status' of the virus at a particular destination would most influence their decision (17% each).

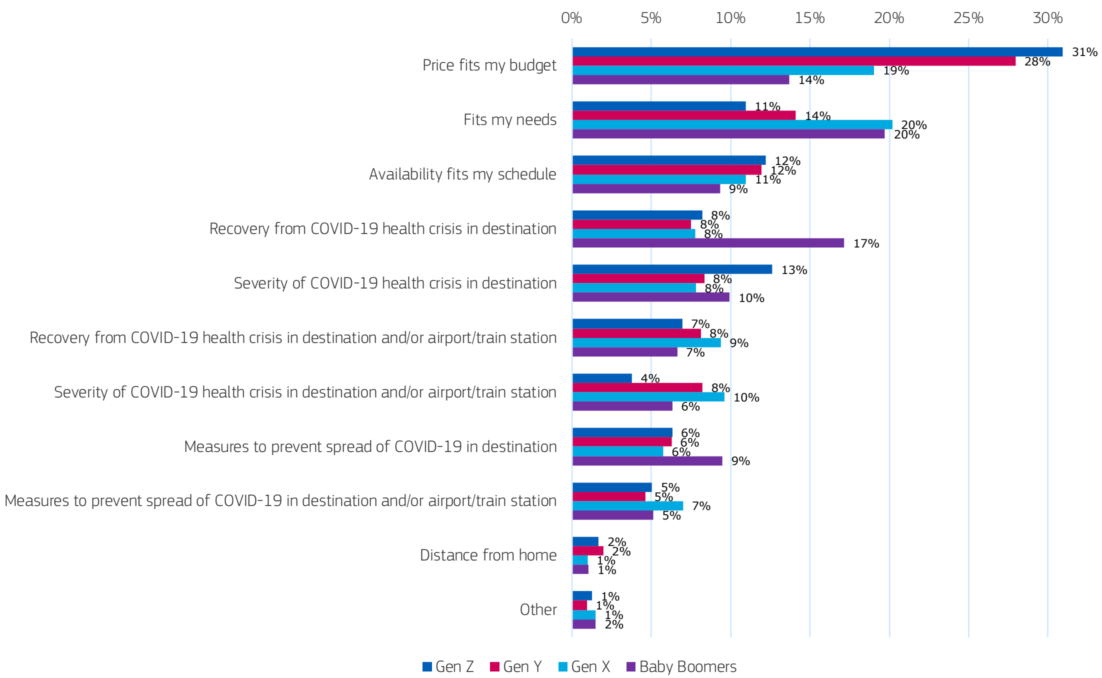
However, there is a slightly smaller 12% who indicate that the 'Measures to prevent spread' of the virus at the same destination would be the defining factor.

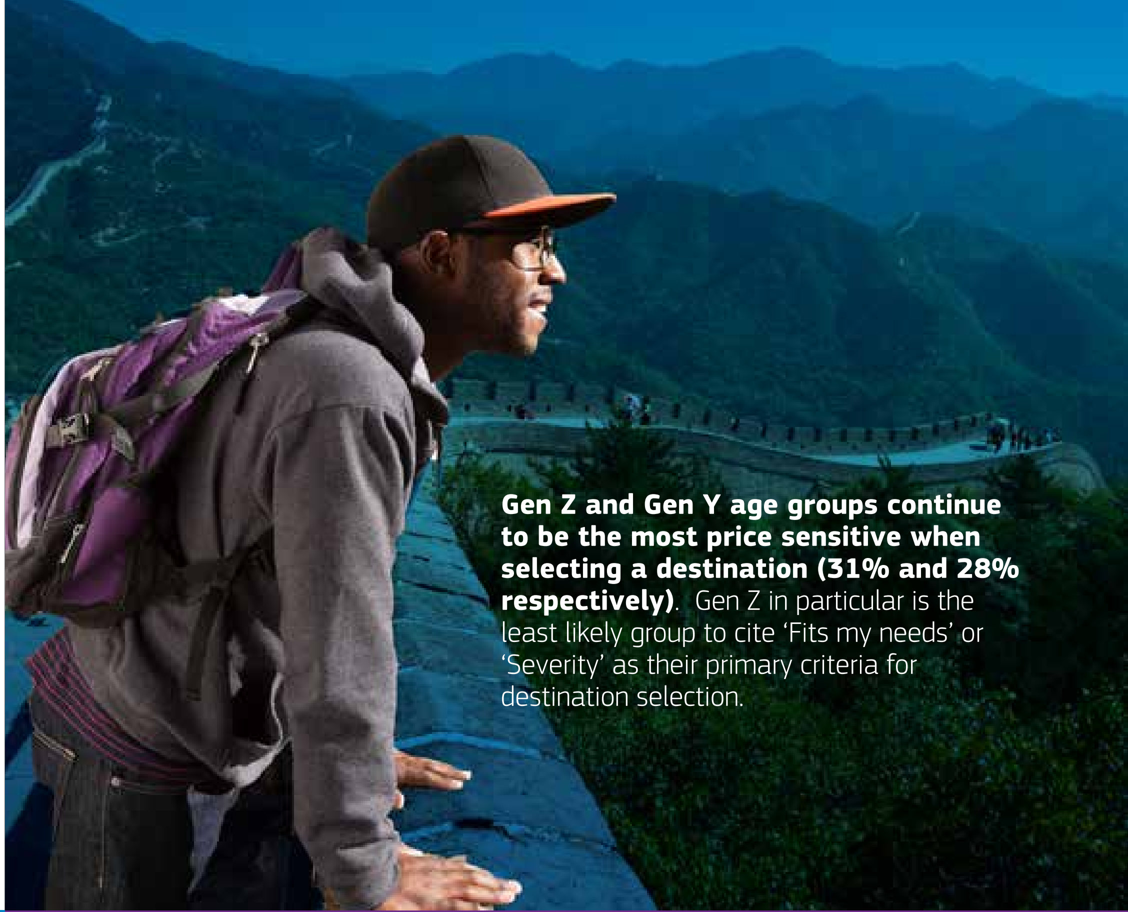
Regional Viewpoints on Leisure Destination Selection Criteria



- **NECSE respondents were the only regional group to exhibit a 'non COVID-19' factor distinction**. Travelers hailing from this part of Europe were the most likely and largest group (23%) to cite 'Fits my needs' as the most influential factor in their destination selection.
- **Travelers from both APAC and MEA are the most likely of their peers to say that the 'Severity' or 'Measures to prevent spread' of the COVID-19 virus influence their choice of destination**. Overall, we observe that 'Price' ranked slightly higher than 'Fits my needs' for MEA respondents; while for APAC, 'Fits my needs' just edged out 'Price' as the most influential factor.
- **Travelers from WE are the overwhelmingly largest regional group to say 'Recovery status' is the most influential factor, which ranked third overall in their responses**. Price was also a clear winner (24%) compared to the next closest factor, 'Fits my needs' (15%).

Generational Viewpoints on Leisure Destination Selection Criteria





Gen Z and Gen Y age groups continue to be the most price sensitive when selecting a destination (31% and 28% respectively). Gen Z in particular is the least likely group to cite ‘Fits my needs’ or ‘Severity’ as their primary criteria for destination selection.

Baby Boomers are the most likely age group to cite ‘Recovery status’ of a destination as the most influential factor in their decision making. However, they are the least likely age group to cite ‘Price’ as the primary factor. ‘Fits my needs’ was the top ranked category selected by 1 in 5 Boomers in our study.

OUR TAKEAWAY

Be transparent as possible with your travelers. Position relevant COVID-19 recovery status and prevention measure along with price details to match the decision-making mindset of your traveler.

ASK YOURSELF

- *Do you have a strategy to obtain reliable access to relevant COVID-19 information at a destination level?*
- *What steps are you taking to provide the right level of information to travelers in the shopping process?*

3 Different Modes for Different Folks

As travelers start to resume their travel planning, they are now confronting a new paradigm in their decision making. Under what conditions will they fly, ride or drive? Are traditional lodging suppliers still part of the plan or are other non-traditional options such as staying with family & friends and camping becoming more attractive?

When we asked our survey participants about preferences with air, hotel, rail and car rental – we found overall their trust and loyalty of traditional modes of travel remain relatively steadfast. Very few respondents indicate they would consider decreasing or stopping the use of any of the traditional modes of air, hotel, rail or car rental with suppliers.

If anything, we observe an uptick in travelers' willingness to use most transportation and lodging modes along with a clear mandate on the importance of prevention measures to reassure them prior to booking their trips.

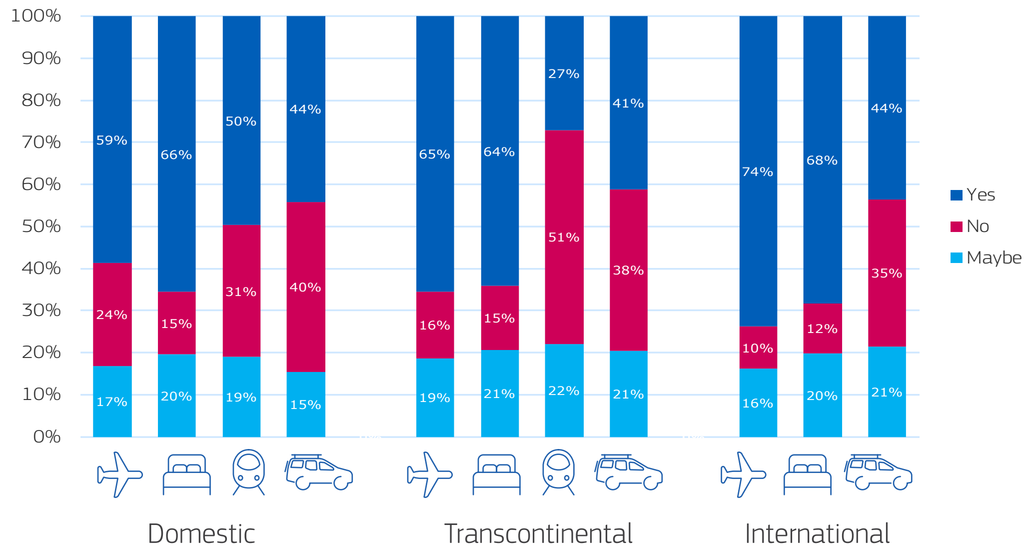
Travelers deem air and hotel options most favorably for direct long-haul versus multi-stop short-haul journeys; however, most are planning to limit the frequency of their upcoming holidays

Travel habits are often formed and codified over annual holidays. With the presence of COVID-19, are travelers now self-imposing limitations on getting to, around and from their dream destination? How will trip distance, stopovers and or frequency potentially influence their new travel behaviors? Findings from our survey illustrate a stark contrast between their willingness to take to the sky and the ground.

3/4 of global travelers view international air travel favorably, followed by hotel and car rental

Question: Which of the following of the following would you consider using once travel restrictions are lifted?

Respondents n = 4,984 (air) n = 4,861 (hotel) n = 4,789 (rail) n = 4,720 (car rental)



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Regional Viewpoints on Travel Mode Usage by Trip Distance

- **The majority of Europeans (both NECSE and WE) are very confident and among the most likely group to use hotel options for upcoming transcontinental journeys.** Travelers from WE also are overwhelmingly positive about using air and rail travel for this same distance category. While NECSE respondents are among the least likely groups to say “yes” to using air and car options for domestic travel.
- **In MEA, we observe a more cautious approach to selecting between the travel modes based on trip distance.** Travelers from this region of the world are the least likely of their peers to say ‘Yes’ to hotel stays for either domestic or transcontinental distances, as well as car and rail for transcontinental scenarios. However, this same group is the largest and most likely group to say ‘Yes’ to flying internationally (84%) compared to domestic air travel (56%).
- **APAC travelers overwhelmingly view domestic and international air and hotel travel options positively, with slightly more confidence in driving a car versus taking the train for domestic travel.**
- **By contrast, AME travelers appear to be the most cautious of the five regional groups**. Our survey shows AME respondents are the least likely to say ‘Yes’ to any of the modes for transcontinental journeys. Rather, this group shows the highest favorability for domestic air (73%) and car travel (52%) of their peers.

When asked about international journeys, air travel garners the largest share of respondents (74%) saying ‘Yes’ to this option. Comparatively, 68% of our respondents said the same for hotel and just under half (44%) say ‘Yes’ to car rental and sharing options. In this particular query, rail was excluded.

In looking at transcontinental distance, air travel receptiveness is again predominantly positive (65%), closely followed by hotel (64%), but with rail and car options appealing to a smaller subset of travelers in our study (27% and 44% respectively). The proportion of respondents who say they would ‘Maybe’ consider each of the four modes is the highest overall in contrast to those who said they would do so for these options in either international or domestic-oriented travels.

Finally, the responses we observe around domestic travel are the most mixed across participants. In this scenario, the hotel category garners the most affirmation from global travelers (66%), followed by air (59%), rail (50%) and car rental (44%).

	AME	APAC	MEA	NECSE	WE
DOMESTIC	73%	72%	56%	44%	57%
	69%	72%	55%	63%	65%
	30%	46%	26%	58%	65%
	52%	49%	56%	36%	42%
TRANSCONTINENTAL	61%	61%	47%	69%	71%
	59%	58%	45%	70%	68%
	25%	26%	21%	26%	31%
	42%	35%	32%	44%	42%
INTERNATIONAL	71%	79%	84%	72%	74%
	66%	71%	72%	69%	68%
	47%	40%	46%	44%	41%

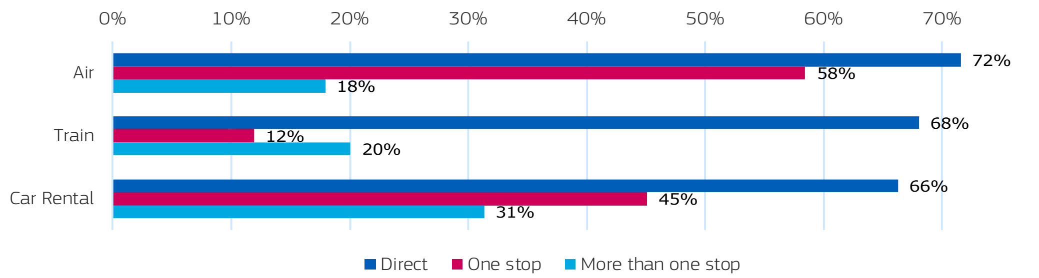
Generational Viewpoints on Travel Mode Usage by Trip Distance

- **Baby Boomers are the most cautious about their use of air, hotel, rail and car options**. Respondents are the least likely to say 'Yes' for nearly every category except for international flight and hotel.
- **Younger Generation Z travelers are the most open to traveling by train or car for domestic and transcontinental distances**. Gen Z is the largest age group by far to favor rail options (70% domestic and 43% transcontinental, respectively) and car rental options (53% domestic and 47% transcontinental, respectively). They are the most likely of their peers to say 'No' to hotel options for international stays.

		GEN Z	GEN Y	GEN X	BABY BOOMERS
DOMESTIC		63%	64%	57%	50%
		66%	67%	66%	60%
		70%	51%	46%	44%
		53%	49%	41%	34%
TRANSCONTINENTAL		68%	67%	66%	59%
		64%	65%	65%	60%
		43%	30%	23%	19%
		47%	42%	42%	33%
INTERNATIONAL		74%	75%	73%	73%
		66%	68%	69%	67%
		45%	44%	44%	38%

Question: Which of the following of the following routes would you consider taking once travel restrictions are lifted?

Respondents n = 4,984 (air) n = 4,789 (rail) n = 4,720 (car rental)



For air travel, the preferred choice of direct routes by 72% of our respondents is clearly far above those who say they would consider a single connection point (54%) or more than one connection while transiting after COVID-19 restrictions are lifted (18%). When asked about car rental and sharing, we observe a slightly smaller group who say 'Yes' they would consider this mode of transportation for direct routes (66%) versus a single stop (45%) and making multiple stops (31%).

The majority of participants in our survey (68%) also say they prefer direct routes, but we see a much smaller group (20%) who say they would consider a single stop when traveling by rail. When asked about car rental and sharing, we observe a slightly smaller group who say 'Yes' they would consider this mode of transportation for direct routes (66%) versus a single stop (45%) and making multiple stops (31%).

Regional Viewpoints on Connection Preferences by Travel Mode

- **Right now, AME travelers are one of the least likely of their peers to feel comfortable with making a connection during their travels.** We see that they are especially the least likely to say 'Yes' to considering either flying or taking the train with at least one connection. In the case of air travel, AME participants are the most likely of all the regional groups to say 'Maybe' (53%) to considering a flight with a single connection point. For car trips, travelers in this region (76%) overwhelmingly say they would consider direct routes versus making stops along the way. Direct itineraries are likewise mostly favored by this regional group if traveling by train.

- **While in APAC, travelers are more nuanced about their stopover choices for air travel**. Here we observe a higher likelihood of openness to considering flights with one connection (64%) compared to those who say they would consider flight options with more than one connection (48%). APAC travelers are the most likely of the regions to say they might consider more than one connection in their air travel plans.

- **MEA travelers are not as comfortable with indirect air and car travel routes**. Participants from this region are among the most likely to say 'No' to considering a flight itinerary with multiple connection points. Likewise, we see respondents from MEA are the least likely to say 'Yes' to car trips with one or more stopovers, with the majority (75%) saying they prefer direct driving routes. MEA holiday goers also display the strongest preference (80%) for direct journeys when transiting by rail.

- **Among European respondents, we observe interesting nuances in how they consider air travel itineraries**. Travelers hailing from WE countries are the mostly likely to say 'Yes' to direct flights, while those residing in NECSE countries are the least likely to say 'Yes' to this option by a margin of nearly 10 percentage points. NECSE travelers like their APAC peers are also the most likely group to say 'Yes' to flights with one connection point. However, the differences between WE and NECSE are the most striking in their attitudes towards flight itineraries with multiple connections. In this scenario, we observe WE travelers are among the most likely and second largest respondent group (64%) to say 'No', in contrast to NECSE survey participants who are the least likely of their peers to say the same by 12 percentage points. NECSE travelers are also the most likely and largest of our survey population to say 'Yes' to train journeys with one or more connection points.

		AME	APAC	MEA	NECSE	WE
DIRECT	Air	71%	72%	75%	67%	76%
	Train	79%	66%	80%	56%	70%
	Car	76%	67%	75%	53%	70%
ONE STOP	Air	53%	64%	55%	64%	56%
	Train	8%	15%	8%	17%	10%
	Car	47%	44%	39%	43%	48%
MORE THAN ONE STOP	Air	17%	20%	12%	21%	16%
	Train	14%	19%	12%	27%	20%
	Car	32%	31%	26%	35%	28%

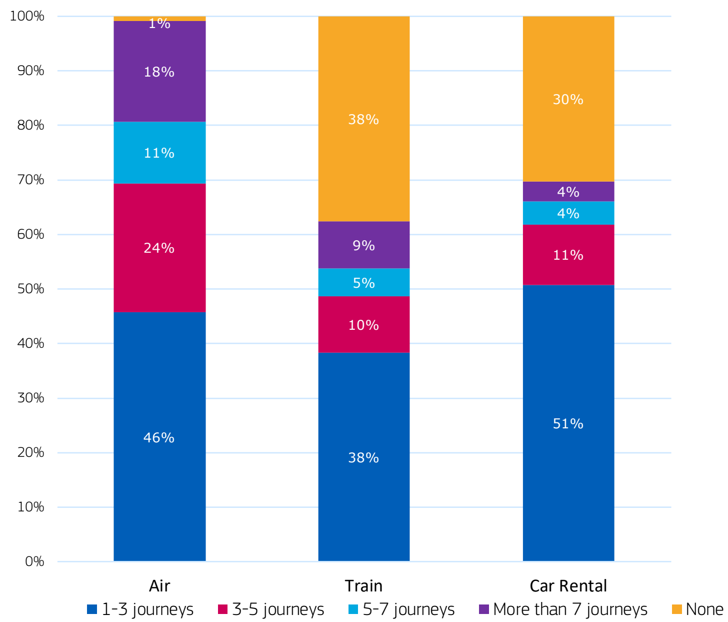
Generation Z is the most likely of the age groups to say 'Yes' to both flight and rail itineraries involving one or more connections, although the majority of respondents still say they prefer the option of direct trips for each mode of travel.

Almost
1/2

of global travelers expect to take only 1-3 journeys using air, rail or car transit per year

Question: What is the likely maximum yearly frequency of using air, rail or car in the future? (Select all that apply)

Respondents n = 4,984 (air) n = 4,780 (rail) and n = 4,717 (car rental)

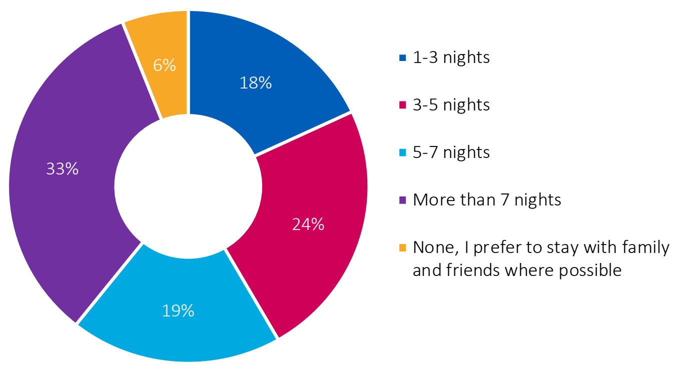


When asked about air travel frequency preferences, the majority of our respondents say they will likely take just 1-3 flights per year. Just under a quarter say they plan to fly 3-5 times while almost 1 in 5 in our survey say they anticipate more than seven flights for leisure purposes.

With respect to ground transit options, 51% of our survey participants say they expect to take 1-3 car trips compared to 38% who say they will travel this often by rail. Less than 10% of our sample say they plan to take more than seven trips either by car or rail.

1/3

of global travelers say they will likely stay more than seven nights in a hotel per year



Responses to the question of frequency of stays at hotels yield the most interesting results. At least a third of our participants say they plan to stay in a hotel for more than seven nights, followed by another quarter of whom say they expect to stay for 3-5 nights.

DID YOU KNOW?

Regions Have Differences in Frequency Preferences by Travel Mode

At 51%, **AME leisure travelers** are the largest and most likely group to say they expect to take only 1-3 flights per year going forward. While those based in **APAC countries** are among the most likely of travelers who say they plan to take more than seven flights in the foreseeable future.

NECSE holiday goers are the largest and most likely group (44%) to tell us they anticipate staying at a hotel for seven nights or more. When asked about rail, leisure **travelers in WE** are the largest and most likely of their peer groups (43%) to say they plan a maximum of 1-3 train trips per year.

HOTEL

DID YOU KNOW?

Generations Share Views in Frequency Preferences by Travel Mode

Baby Boomers and Gen Z:

Most likely to say will only take **1-3 flights annually** going forward

Least likely to say will take **1-3 car trips per year** in the future

Baby Boomers and Gen X:

Most likely to say 'Yes' to future **hotel stays of 7 nights or longer**

OUR TAKEAWAY

Travelers indicate a more discerning approach to considering their future mode of transit. Travel sellers will need to enhance their selling strategy to address more specific buying personas with the help of data-driven automation practices.

ASK YOURSELF

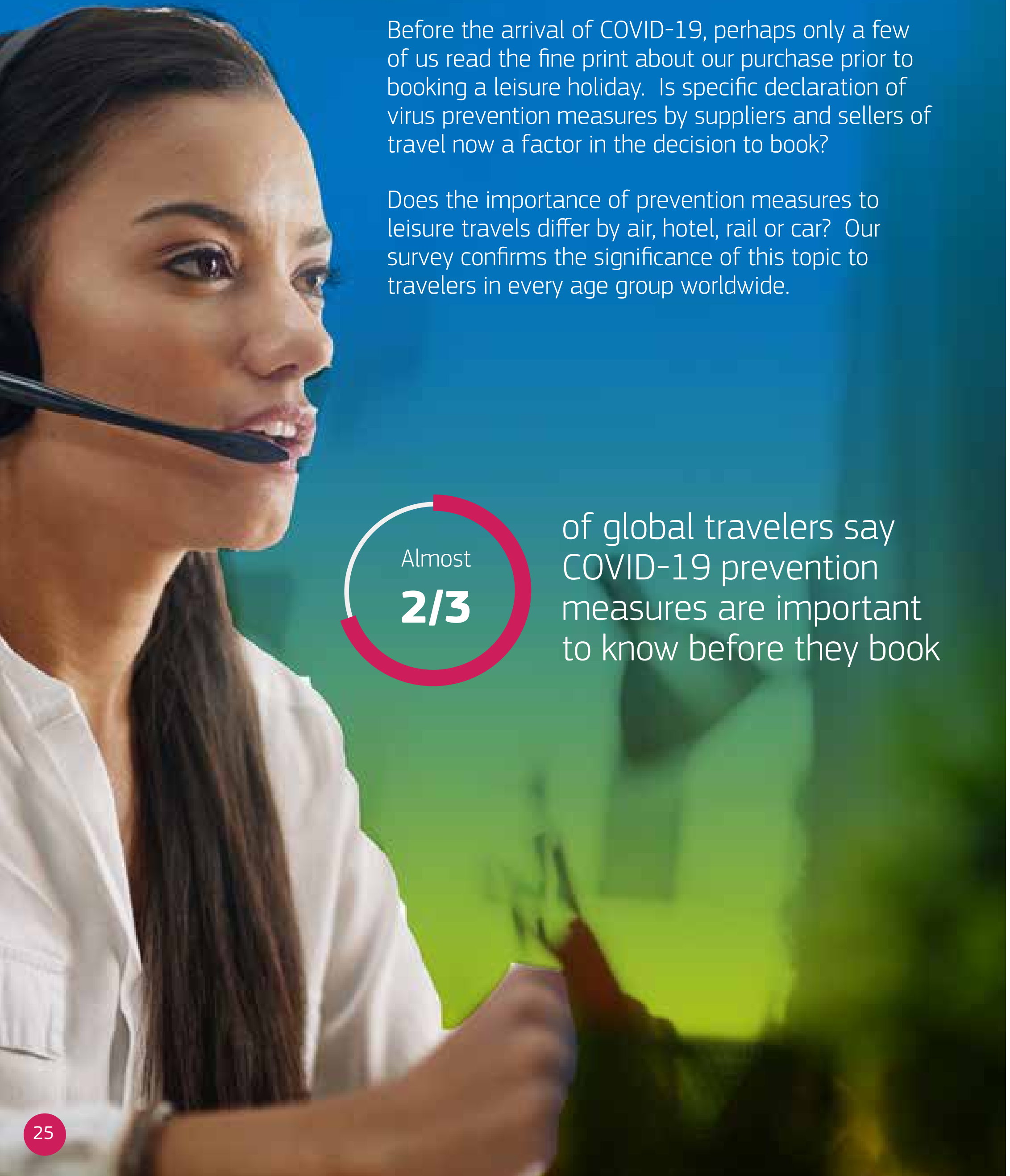
- *How well are your current systems in capturing and analyzing the buying preferences of your existing travel customers?*
- *In what parts of your business can artificial intelligence help you to better detect and address the specific buying profile of new travel clients?*

Hotels and airlines have the most to gain by communicating their COVID-19 prevention measures up front to travelers

Before the arrival of COVID-19, perhaps only a few of us read the fine print about our purchase prior to booking a leisure holiday. Is specific declaration of virus prevention measures by suppliers and sellers of travel now a factor in the decision to book?

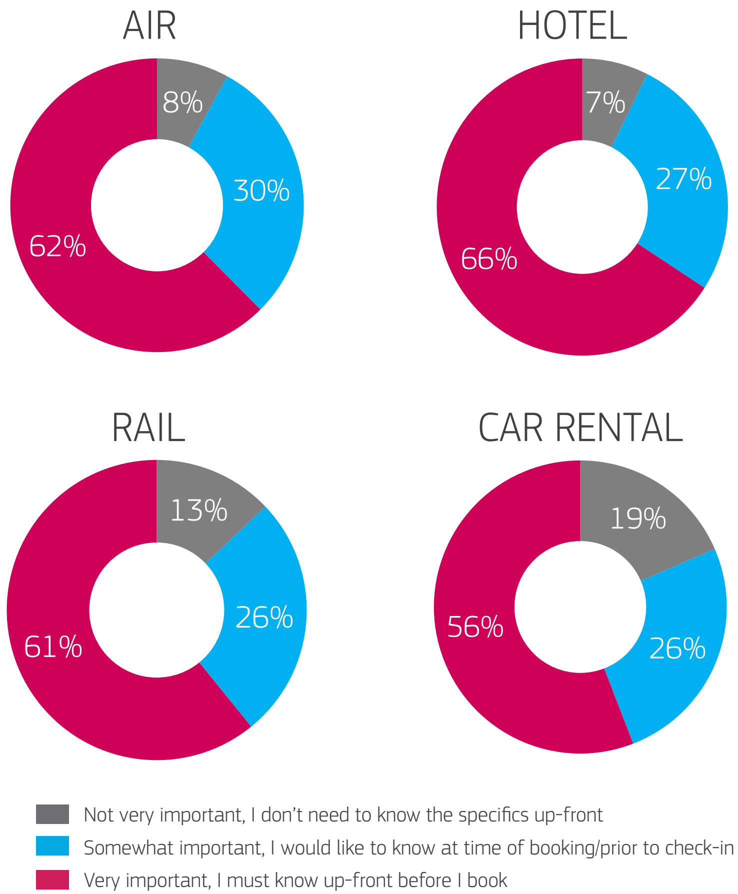
Does the importance of prevention measures to leisure travels differ by air, hotel, rail or car? Our survey confirms the significance of this topic to travelers in every age group worldwide.

Almost **2/3** of global travelers say COVID-19 prevention measures are important to know before they book



Question: How important are COVID-19 prevention measures to you going forward? (SELECT ONE OPTION PER MODE OF TRAVEL)

Respondents n=4,984 (air); n=4,861 (hotel); n=4,758 (rail) and n=4,710 (car rental)



Travelers in our survey overwhelmingly tell us that COVID-19 prevention measures matter prior to booking or check in. In the area of hotels, we observe the largest percentage (66%) who say prevention knowledge is 'Very important' for them to know up front before they book their stay.

While slightly less of our survey population (62%) say the same for air travel, followed by rail (61%) and car rental and sharing (56%). At least a quarter of travelers in our study say COVID-19 prevention measures by travel suppliers or agents for air, hotel, rail and car was somewhat important for them to know at least prior to check in for their trip.

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Regional Viewpoints on Supplier CV-19 Prevention Measures

- **NECSE stands out as the least likely of their peers to say COVID-19 prevention knowledge is a must prior to booking or traveling in all four mode categories**. Of the four, the largest percentage (49%) of travelers from this region say hotel prevention measures are 'Very important', compared to 46% for air, 43% for rail and just 38% who say the same for car travel.
- **Travelers from AME and MEA by contrast, are among the most likely of their peers to place a high importance on upfront knowledge of prevention measures in all mode categories**. Nearly equal percentages of participants who say this knowledge is 'Very important' for them to know up front are observed between air, hotel, rail and car.
- **In APAC, we only see this same acute desire for COVID-19 prevention knowledge for air and hotel modes of travel.** Travelers in APAC do not exhibit as high an importance to know COVID-19 prevention measures in advance when traveling by rail or car.

		AME	APAC	MEA	NECSE	WE
VERY IMPORTANT, I MUST KNOW UPFRONT	Air	76%	67%	79%	46%	62%
	Hotel	79%	73%	85%	49%	66%
	Rail	76%	62%	80%	43%	63%
	Car	74%	58%	70%	38%	55%
SOMEWHAT IMPORTANT, I WOULD LIKE TO KNOW AT THE TIME OF BOOKING/PRIOR TO CHECK-IN	Air	21%	28%	16%	39%	31%
	Hotel	18%	22%	11%	37%	28%
	Rail	17%	28%	10%	35%	27%
	Car	19%	27%	17%	34%	24%
NOT VERY IMPORTANT, I DON NOT NEED TO KNOW HTE SPECIFICS UPFRONT	Air	3%	6%	5%	15%	6%
	Hotel	2%	5%	4%	14%	6%
	Rail	7%	11%	10%	22%	10%
	Car	7%	15%	13%	28%	21%

Baby Boomers are the most likely of the generational groups to say that upfront knowledge on COVID-19 prevention measures is 'very important' for them to know prior to booking a flight or hotel room

OUR TAKEAWAY

Empowerment in the face of COVID-19 is essential for travelers to purchase and feel confidence about their upcoming journeys. Travel sellers and suppliers should proactively communicate their COVID-19 prevention measures continuously throughout the booking process as well as during the trip experience.

ASK YOURSELF

- *What is your strategy to proactively share COVID-19 prevention protocols and other relevant information with your prospective and existing travel clients?*
- *How are you equipping your staff and/or self-service platforms to provide customers with ongoing prevention measure updates beforeand during their trips?*

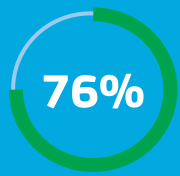
Overall traveler confidence with flying, staying at hotels, traveling by train and rental car remains strong

We are all experiencing the new realities brought on by COVID-19. How is the presence of COVID-19 impacting traveler confidence with particular traditional modes of travel? Are other non-traditional modes gaining more favor with travelers? Our survey finds that despite the challenges ahead, the majority of travelers around the world intend to carry on with using all four modes of travel.

Question: What are your feelings at THIS TIME about continuing to fly, stay in hotels, taking the train and rental/sharing a car?

of global travelers say they will continue to fly

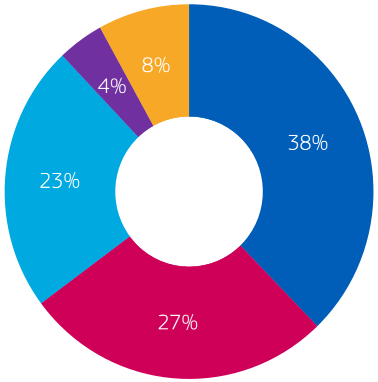
of global travelers say they will keep using hotels



of global travelers say they will keep traveling by train

of global travelers say they will keep traveling by car

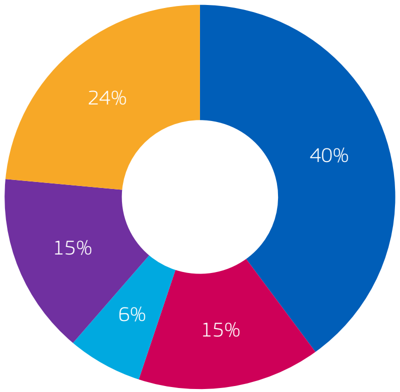
AIR



Respondents n=4,984

- I am comfortable with flying and would continue doing so
- I am less comfortable with flying, but would continue doing so
- I am more comfortable with flying and continue doing so
- I am more comfortable with train or car travel and would decrease/stop flying
- I am more comfortable with train or car travel, but would continue to fly

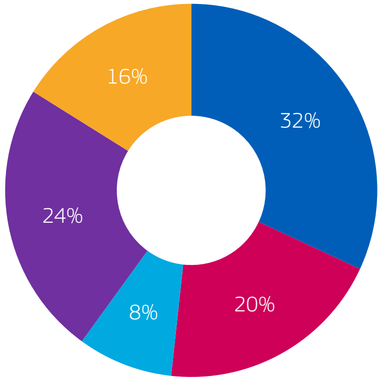
HOTEL



Respondents n=4,861

- I am comfortable with staying in a hotel or Airbnb and would continue doing so
- I am less comfortable with staying in a hotel or Airbnb, but would continue doing so
- I am more comfortable staying with family & friends and would decrease/stop booking a hotel room or Airbnb
- I am more comfortable staying with family & friends, but would resume booking a hotel room or Airbnb
- I am more comfortable with staying in a hotel or Airbnb and would continue doing so

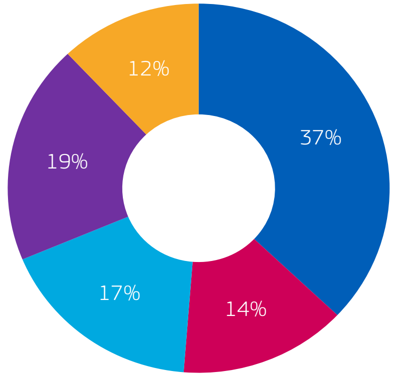
RAIL



Respondents n=4,768

- I am comfortable with traveling by train and would continue doing so
- I am less comfortable with traveling by train, but would continue doing so
- I am more comfortable with traveling by train and continue doing so
- I am more comfortable with travelling by car or plane, and would decrease/stop traveling by train
- I am more comfortable with travelling by car or plane, but would continue traveling by train

CAR



Respondents n=4,706

- I am comfortable with renting/sharing a car and would continue doing so
- I am less comfortable with renting/sharing a car, but would continue doing so
- I am more comfortable with renting/sharing a car and continue doing so
- I am more comfortable with using my own car and would decrease/stop renting/sharing a car
- I am more comfortable with using my own car, but would continue renting/sharing a car

The majority of our global respondents (38%) say they are comfortable flying and will continue to do so, with nearly a quarter more (23%) who say they are most comfortable with flying now and will continue to take to the skies.

The third largest set of participants (27%) tell us they are less comfortable with air travel, but they will still continue to fly. We observe a similar trend in our data for hotel stays and car rental – the majority of travelers (40%) say they feel the same level of comfort with hotel stays, followed by an equal split of respondents (15% each) who either say they are more comfortable or less comfortable with their upcoming hotel stays, but will continue to do so.

For car rental and sharing, the majority of our survey respondents (37%) also say there are comfortable continuing this mode of transit, with a smaller group (17%) who say they are more comfortable renting and / or sharing cars.

About a third of our survey (32%) tell us they are comfortable traveling by train and will continue to do so. While almost 10% say they are more comfortable with rail journeys now. 1 in 5 leisure goers say while they are less comfortable with traditional rail options, they will continue to use trains.

DID YOU KNOW?

Which regional groups are most likely to continue or decrease using certain traditional modes of travel?

AMERICAS
Say they are less comfortable with hotels, but will continue their use

ASIA PACIFIC
Say they are less comfortable flying but will continue to do so

MIDDLE EAST AFRICA
Say they are more comfortable staying with family & friends, but will continue to use hotels

NORTH, EAST, SOUTHERN EUROPE
Say they are more comfortable now with flying and staying in hotels

WESTERN EUROPE
Say they are comfortable traveling by rail and would continue doing so

DID YOU KNOW?

Which generational groups are most likely to continue or decrease using certain traditional modes of travel?

- Only **Baby Boomers** indicate a higher likelihood of all the age groups to say they are less comfortable with flying but would continue to do so going forward. Over half (54%) say they are comfortable or more comfortable with air travel and will continue to fly.

- **Generation Z** are the most likely of the generations in our survey to say they are either more comfortable staying with family & friends, compared to hotel/AirBnB or using their own vehicles, compared to renting or sharing a car. However, in both of these cases, the respondents tell us they will continue booking hotel/AirBnb stays and renting/sharing cars.

OUR TAKEAWAY

Travelers are mostly confident about continuing to use all four modes of travel. Rail journeys may take more convincing in the early days of recovery. Travel sellers and suppliers should help their clients understand the tradeoffs of using each traditional mode and clearly reinforce coronavirus prevention measures in place to ultimately capture the sale.

ASK YOURSELF

- *What is your plan to reassure travelers about each aspect of their upcoming journeys?*

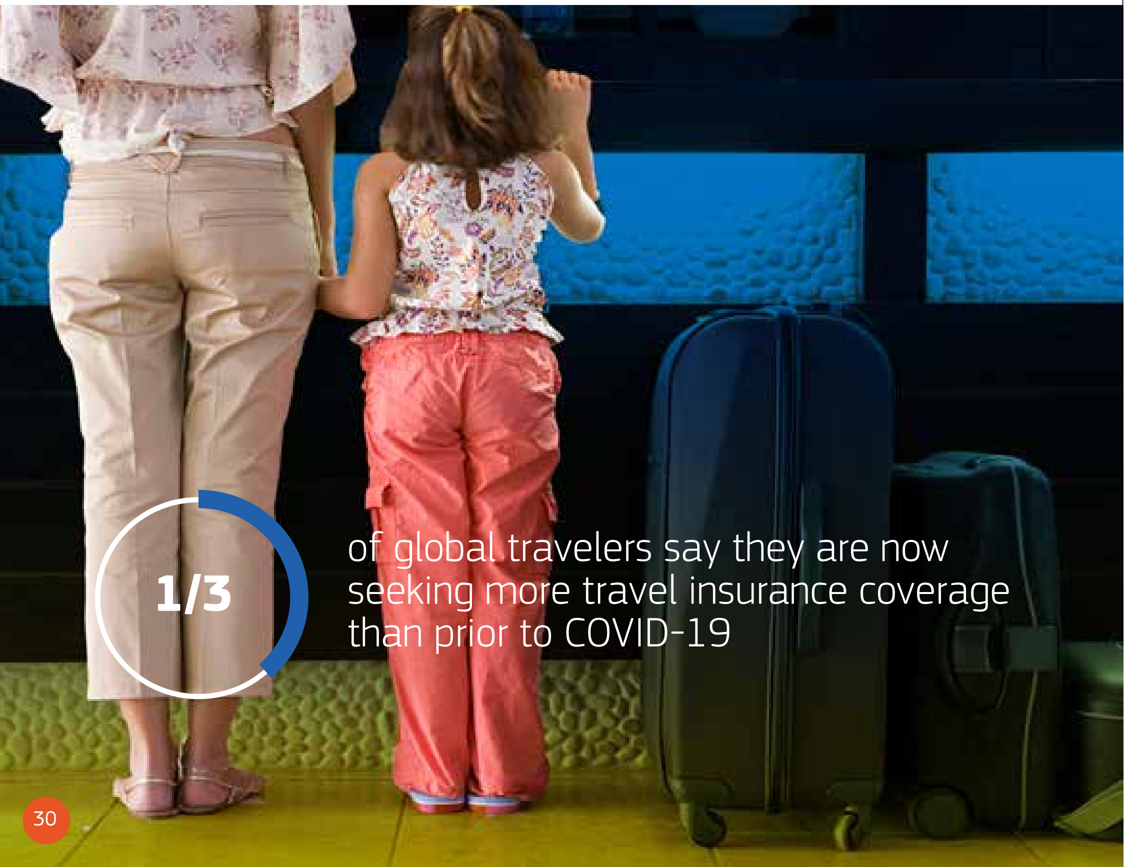
- *How are you training staff to engage with more empathy and guidance when prospective and existing travelers share concerns about using a specific mode of travel? Can your digital touchpoints express and reinforce the same level of empathy and guidance to your customers?*

4 Insurance More Top of Mind

As travelers around the globe prepare to make decisions about their next leisure getaway, the question of any, some or none in the context of travel insurance takes on a much more significant role.

Will leisure goers give insurance a harder look before they book? How will the type of insurance coverage factor into their overall travel purchase consideration?

Our global study found that trip insurance has risen in importance for a sizeable population of travelers. However, some leisure-oriented travelers now say what they specifically value from trip insurance goes beyond the basics of refunds and change of date flexibility.

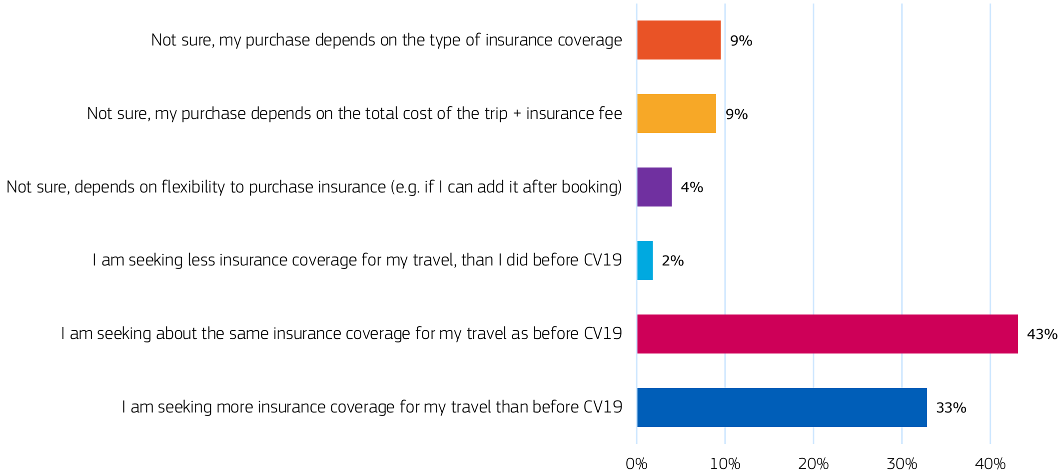


Insurance is considered a more integral part of the travel purchase

Before now, the question of adding trip protection to our booking may have appeared as a casual post booking afterthought. But with the advent of COVID-19, how are travelers' expectations for needing coverage evolving as they anticipate their future holidays? Our results show a strong uptick in overall importance across several dimensions.

Question: Have your travel insurance needs changed at this time?

Respondents n=4,713



Just over three-fourths (76%) of our survey population say they are seeking either the same or more insurance coverage than before COVID-19. Almost another quarter (22%) of our respondents say they are 'Not sure' as their decision would ultimately depend upon either: total cost of trip (9%), type of coverages offered (9%) or the flexibility they have to add insurance at a later time during post booking (4%).

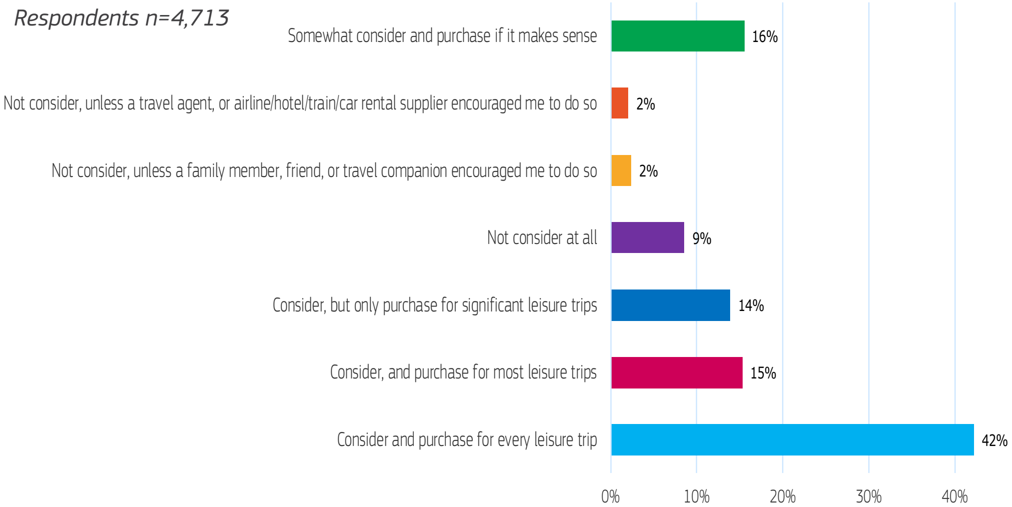
DID YOU KNOW?

Which regional and generation groups are most likely to consider more travel insurance than before COVID-19?

AMERICAS	37%	GEN Y	48%
MIDDLE EAST AFRICA	48%	GEN Z	48%

Question: What is the probability of you purchasing travel insurance for your next trips?

Respondents n=4,713



87% of our survey participants say they are likely to consider purchasing travel insurance for every, most or a few highly significant leisure trips. Just under 5% say they would not consider travel insurance unless encouraged to do so by a family, friend or travel agent / supplier.

42% of global travelers say they would consider and purchase insurance for every leisure trip

DID YOU KNOW?

Which regional groups are most likely to consider and purchase insurance for every trip?

ASIA PACIFIC

47%

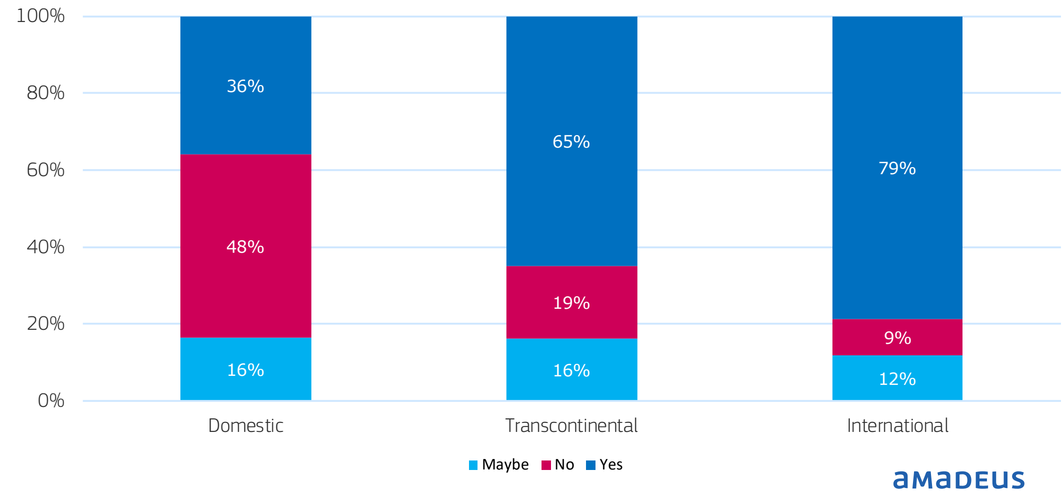
MIDDLE EAST AFRICA

49%

Twice as many global travelers say they consider insurance necessary for international versus domestic trips

Question: For which of the following would you consider some level of travel insurance necessary before booking your next holiday?

Respondents n=4,713



International journeys had the largest group of leisure travelers (79%) that say they would consider travel insurance a necessity. For transcontinental and domestic holidays, there is a distinctly smaller group who feel some level of travel insurance is necessary (65% and 36%, respectively) before booking.

DID YOU KNOW?

Which regional groups are most likely to consider and purchase insurance for every trip?

ASIA PACIFIC & GEN Z	WESTERN EUROPE	MIDDLE EAST AFRICA
Least likely to say travel insurance is not a necessity for domestic trips	Most likely to say travel insurance is not a necessity for domestic trips	Most likely to say travel insurance is a necessity for international trips

OUR TAKEAWAY

Insurance is becoming a core part of your leisure traveler's international shopping experience. Help travelers appreciate the benefits and overall value for transcontinental journeys, too.

ASK YOURSELF

- *What steps are you taking to ensure the right travel insurance options are visible in both your traveler's and agent's shopping flows?*
- *What is your strategy to foster more travel insurance opportunities within transcontinental as well as international bookings?*

Travelers are looking for value beyond refunds from their trip insurance coverage options

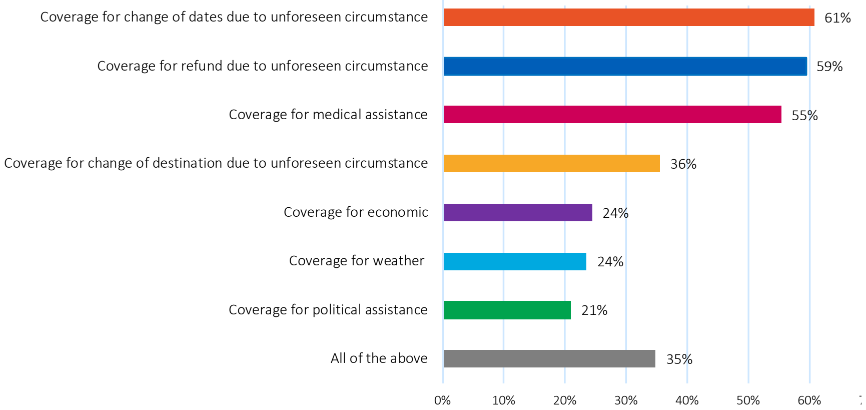
Prior to COVID-19, most of us only took note if our airfare, hotel, car or other excursion fare was classified as refundable. However, as borders began to close around the globe, hundreds of thousands of travelers soon found themselves looking for assistance.

What types of coverage and service do travelers value most when it comes to choosing a travel insurance option? Our results indicate a wider appreciation for medical related assistance, pandemic coverage as well as the flexibility to make necessary changes to the booking.

More than half of global travelers deem medical assistance as an important part of their travel insurance purchase

Question: Which of the following would you consider as important to purchasing travel insurance?

Respondents n=4,288



In the realm of flexibility, we observe 61% of our respondents say they value the ability to change dates to unforeseen circumstances, while 36% also say they value the option to change the destination for their leisure getaway. Coverage for refunds are considered important by 59% of our participants.

Our study also examines the importance of specific types of assistance due to unforeseen health, weather, political or economic conditions. Comparatively, medical assistance rises high above the other categories in the list with more than half of our respondents saying it was important. Just over a third (35%) of our respondents say they consider 'all of the above' options in our travel insurance coverage list as important.

DID YOU KNOW?

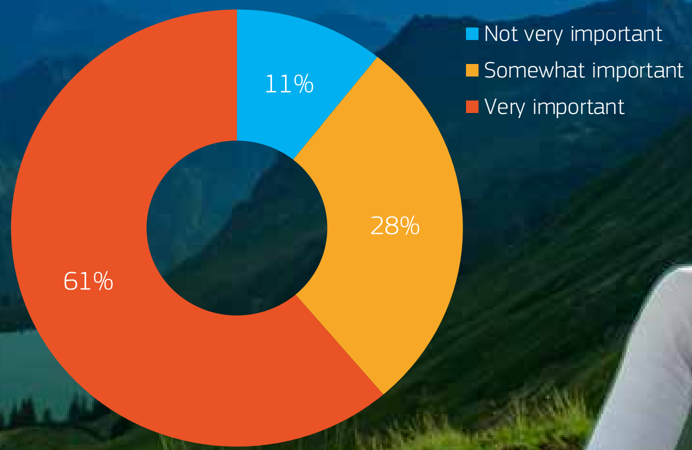
Which regional and generational groups are most likely to place importance on a particular aspect of travel insurance coverage?

MIDDLE EAST AFRICA	WESTERN EUROPE	GEN Y and GEN Z
40% say for the flexibility to change destination	65% say refunds for unforeseen circumstances	67% / 65% say for flexibility to change dates

2/3 of global travelers view pandemic related coverage as essential for their future travels

Question: How important is COVID-19 and other pandemic related travel insurance coverage to you going forward?

Respondents n = 4,693



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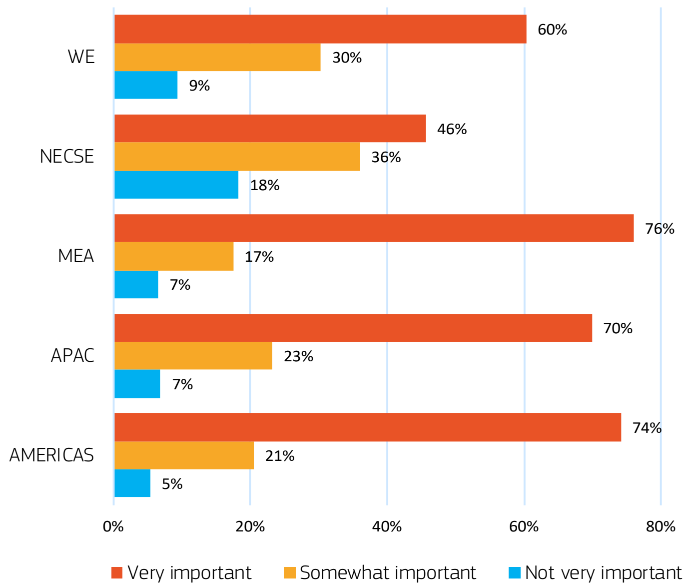
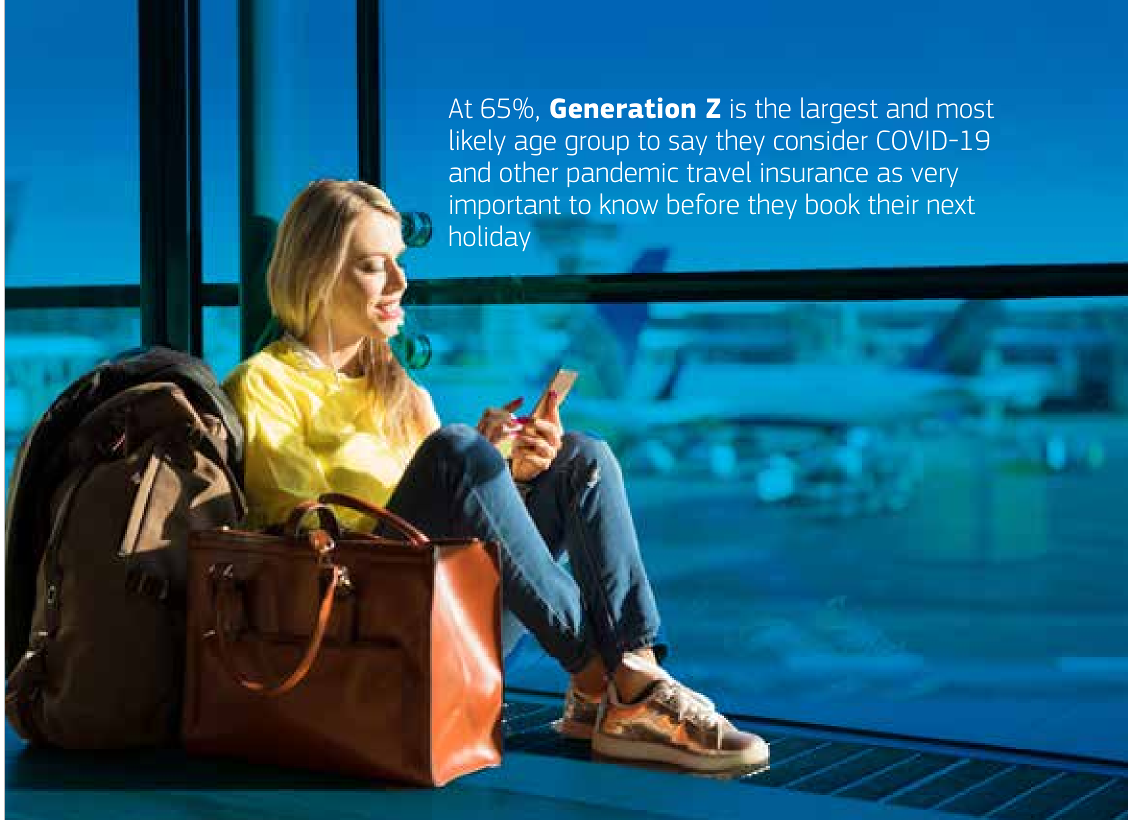
The majority of travelers (61%) in our survey tell us they consider COVID-19 and other related pandemic insurance coverage to be very important to know up-front before they book their next trips.

Roughly over a quarter more (28%) of our global respondents say pandemic related coverage is only somewhat important to them, indicating they would like to know specifics at the time of booking but no later than prior to check-in.

Regional Viewpoints on Importance of Pandemic Travel Coverage



- **AME, APAC and MEA were amongst the most likely regional traveler groups to say that pandemic related insurance coverage is very important to know prior to booking their trips**. Of the three, MEA is the largest group (76%), followed by AME (74%) and APAC (70%).
- **NECSE travelers in comparison were among the least likely regional group to say that pandemic insurance coverage is very important.** Rather, respondents from this part of Europe are most likely to say that pandemic related insurance coverage is somewhat important (36%) or not very important to know up prior to booking (18%).



OUR TAKEAWAY

Easing traveler minds through the next phases of COVID-19 is the key to increasing leisure bookings. Travel sellers and suppliers should take steps to highlight the flexibility and medical coverage benefits of their insurance offering to travelers prior to booking.

ASK YOURSELF

- *How are you equipping your staff to educate and advise their travelers about various COVID-19 related travel insurance options that are available to them?*
- *How are your insurance partners helping you to position your travel brand with existing and potential customers?*

5 Travel Agents Can Seize the Moment

The challenges of COVID-19 caused millions of people around the world to rely more on technology to get advice, connection and help than ever before.

The balance between human and technology touch keeps blurring. What matters most is the quality and timing of interactions along the purchase journey.

What is the role of the travel agent now as the world looks ahead to recovery?

When asked about how and where travel agents can best assist in their travel experience, we observe a strong expectation for either recommendations or support at some stage of the journey. Yet, there are others who say they are undecided when and how they expect agents to engage with them. As the travel industry prepares to enter the next phase, there is a rising need to clearly demonstrate the tangible value of agent recommendations and support.

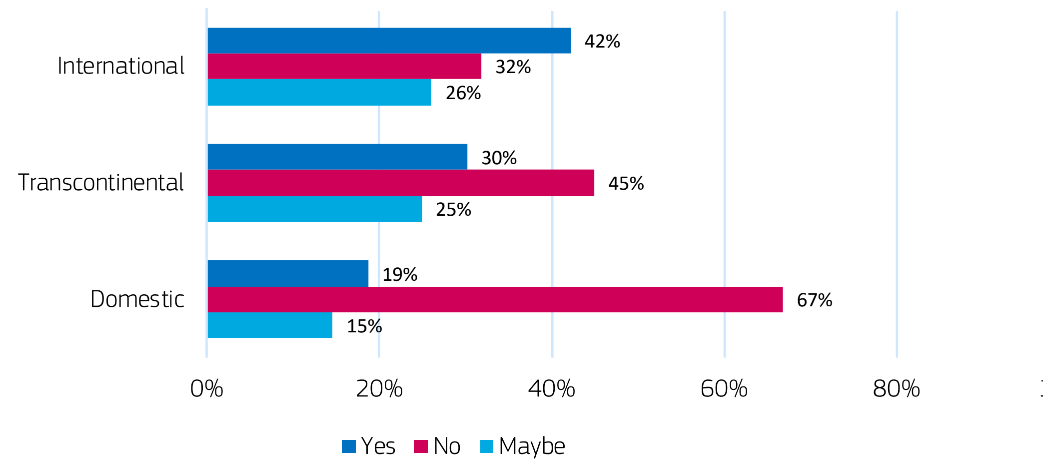
Travel agents can play a bigger role helping travelers resume international travel

As travelers contemplate exploring new destinations again, their trip planning complexity is becoming increasingly challenging. New regulations around quarantines, visas and more plus continuously shifting flight availability requires a greater pool of knowledge, experience and time to ensure the best outcome. What are leisure goers valuing most from travel agents? Our results show travelers are ready to embrace their assistance, especially for international journeys.

Nearly **1/2** of global travelers believe some level of travel agent assistance is required for their international trips

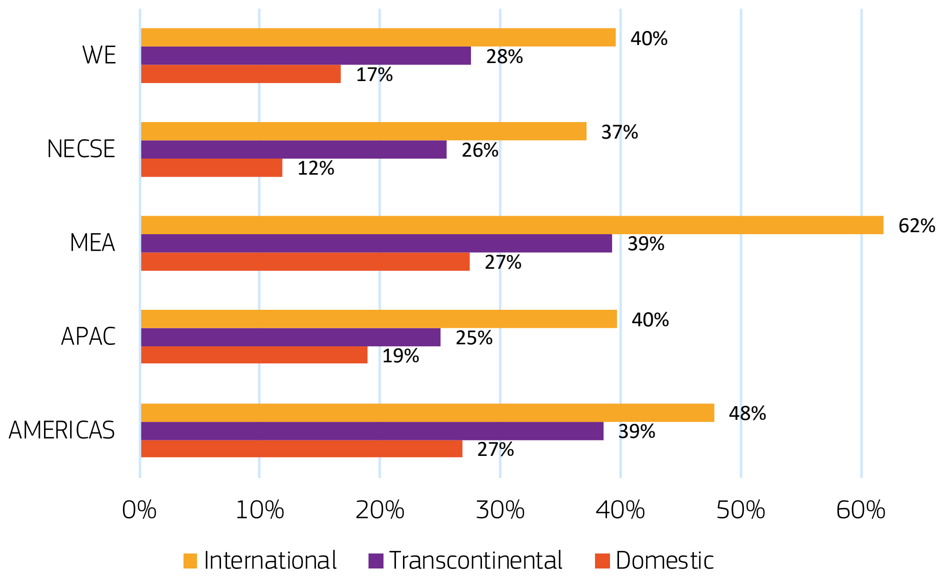
Question: Which of the following would you require some level of travel agent assistance before booking your next holiday?

Respondents n=4,672

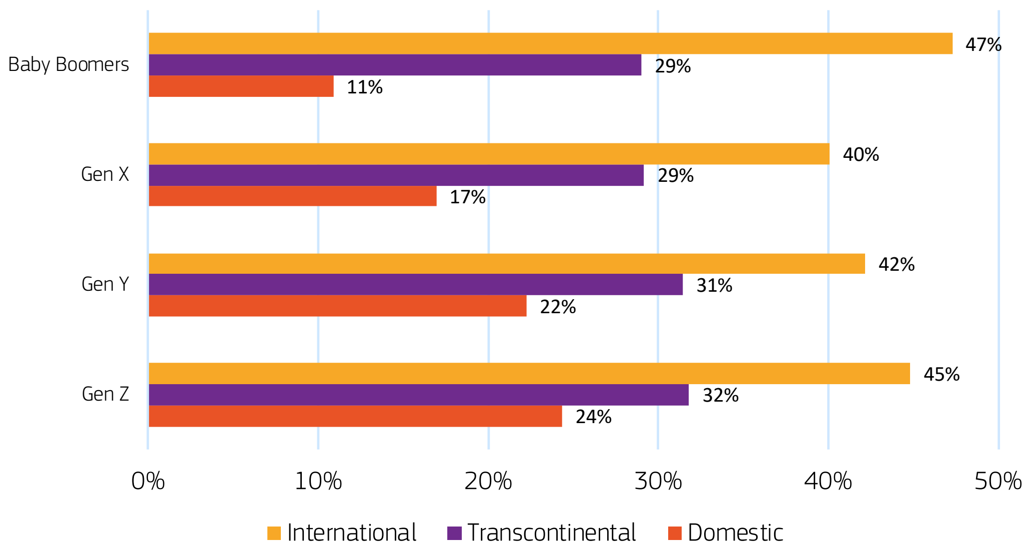


42% of travelers in our global study who are contemplating international travel say they require some level of travel agent assistance. Just over a quarter more (26%) tell us they might require travel agent assistance for international journeys.

Regional Viewpoints on Travel Agent's Involvement by Trip Distance



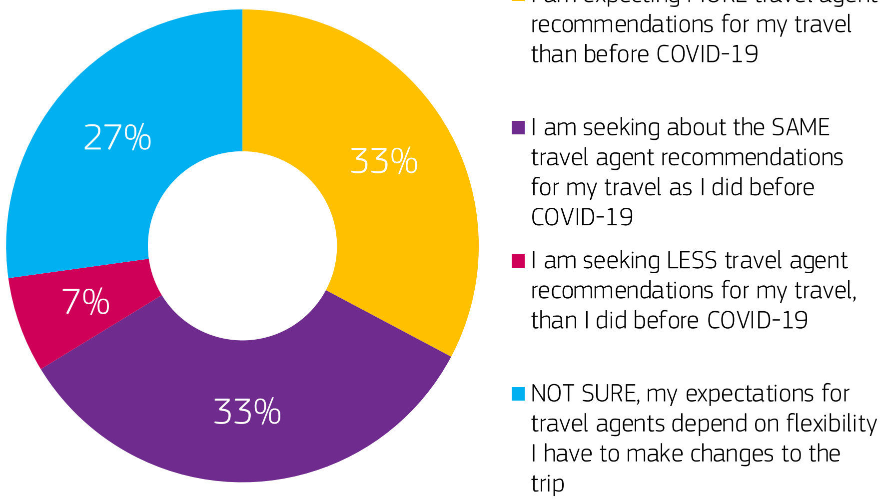
Generational Viewpoints on Travel Agent's Involvement by Trip Distance



- Travelers hailing from AME and MEA are the most likely of their peers to say 'yes' to requiring travel agent assistance in each of the three travel distance categories.
- NECSE respondents by contrast are the least likely of their peers to say 'yes' about requiring travel agent assistance across international, transcontinental and domestic travel experiences.
- While the largest group of Generation Z travelers (45%) in our survey said 'yes' to travel agent assistance for international journeys, we also observe this younger generation to be the most likely of the age groups to say 'yes' for travel agent assistance for domestic travel (24%).
- Out of the three travel distant categories, Baby Boomers are the most likely age demographic to say 'yes' to travel agent assistance for international journeys (47%), as well as 'no' to assistance from travel agents for domestic trips (75%).

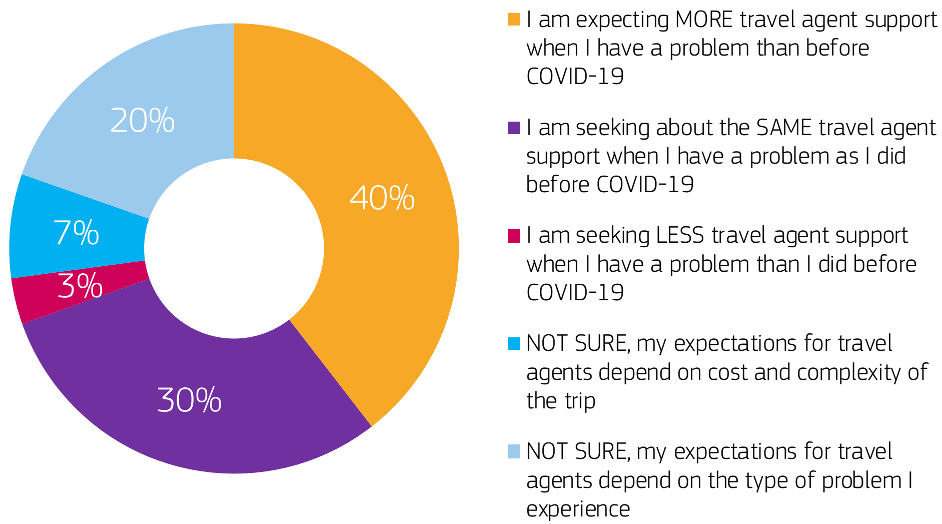
Question: Which statement most accurately reflects your feelings about RECOMMENDATIONS from your travel agent?

Respondents n = 4,693



Question: Which statement most accurately reflects your feelings about SUPPORT from your travel agent?

Respondents n = 4,693



70% of our respondents tell us they expect the same or more problem solving and support from travel agents now. When asked about recommendations, slightly less of our participants (66%) indicated they expect the same level or more advice from a travel agent.

Interestingly, we observe at least 1 in 5 respondents who say they are not sure about support at this time, in that their expectations would depend on the type of trip. Also, more than a quarter (27%) of global travelers say the same for recommendations and advice.

DID YOU KNOW?

Which regional groups are most likely to expect more or the same or less recommendations and support from travel agents?

- Both **AME and MEA** are the most likely of their peers to say they are expecting more problem solving and support as well as recommendations from travel agents at this time.
- **NECSE** are the most likely of the five regions to say they expect the same level of problem solving, support and recommendations. Although, NECSE is also the most likely group to say they are not sure about their expectations for support.
- In sharp contrast, **APAC** travelers are the most likely group to say they are seeking less travel agent support and recommendations compared to their peers who state this preference.

Baby Boomers are the most likely generation to say they are seeking the same level of travel agent problem solving and support as well as recommendations.

OUR TAKEAWAY

Travelers place a higher premium on support. Travel sellers should focus first on problem solving and look for opportunities to continuously engage their customers with hyper personalized recommendations that address known challenges or mitigate unforeseen issues.

ASK YOURSELF

- *Do you have a strategy to assist your customers through any preferred channel?*
- *How well are your staff equipped to provide continuous support and solve customers' problems remotely?*

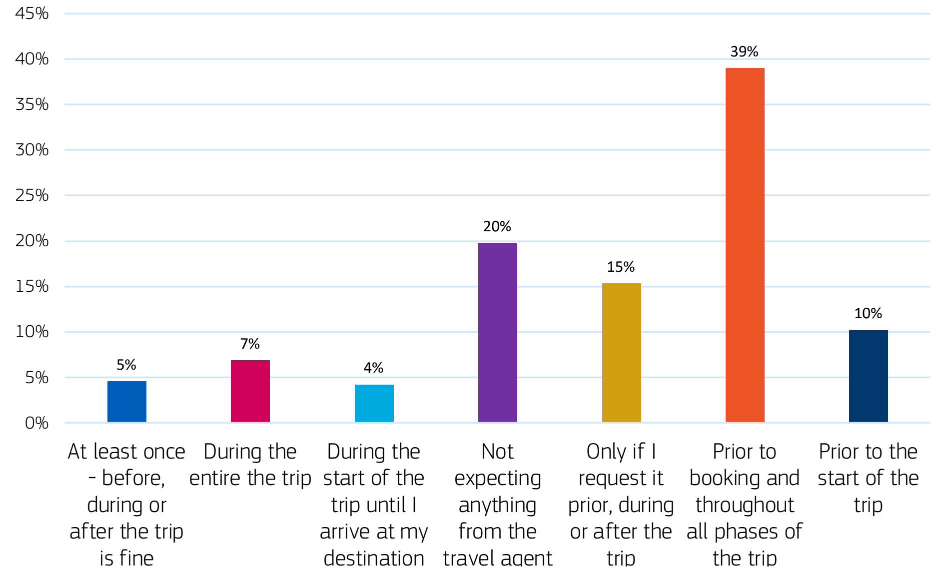
80% of global travelers expect for a travel agent to engage with them at least once either prior to or during their trips

With so much more on their minds, travelers are apt to overlook some critical aspect of their upcoming travel plans. Yet in an increasingly self-service digital world, at what stage of the journey are travel agents expected to help travelers navigate their doubts and unexpected obstacles?

Nearly 40% of global travelers say they expect a travel agent to engage with them prior to booking and throughout their entire trip experience

Question: What is the likely frequency of travel agent recommendations or support?

Respondents n=4,672



Our findings show a wide split of frequency preferences for travel agent engagement. The majority of respondents (39%) say they expect a travel agent to engage and help them prior to booking and throughout all phases of their trip. While another 15% of our participants prefer for an agent to engage them only when requested.

Travelers from **AME and MEA** are the most likely of their peers to say they expect travel agents to engage with them prior to booking and throughout all phases of their trip.

OUR TAKEAWAY

Timing is everything. Travel sellers and suppliers should solicit their travelers' frequency and timing preferences for agent contact as part of the overall booking process.

ASK YOURSELF

- *Are you able to correctly capture traveler engagement preferences in your self-service and agent workflows?*
- *What is your strategy to differentiate your travel brand through customer pre and post booking engagement? Do you have a content plan in place to support your strategy?*

6 Looking Ahead

We are watching the next phases of COVID-19. In some parts of the world, signs of leisure travel are slowly emerging in places where natural parks, beaches and outdoor spaces are safely accessible and supported by testing and tracing measures. Governments are evaluating how to best manage their travel restrictions in a very dynamic and unprecedented global health environment.

Travelers are trying to find their way and make the most of what they can to fulfill their holiday needs. Out of all the recovery factors we examine in our study, traveler confidence is the single most important element. So we asked our participants to tell us what else they believe is needed from travel suppliers and sellers for them to feel less concerned and fully move forward with their leisure travel plans. The top five responses for each category are highlighted on the next page.

What Global Travelers Say Matters Most to Them In Order to Remain Confident About Travel Going Forward

AIR

- Safety & security measures
- Presence of masks
- Widely available vaccine
- Transparent refund policy
- Enforcement of social distancing

HOTEL

- Enhanced cleaning techniques
- Stricter hygiene practices
- Safety & security measures
- Presence of masks
- Widely available vaccine

RAIL

- Enhanced cleaning techniques
- Safety & security measures
- Stricter hygiene practices
- Enforcement of social distancing
- Presence of masks

CAR

- Enhanced cleaning techniques
- Safety & security measures
- Stricter hygiene practices
- Enforcement of social distancing
- More economical options

INSURANCE

- Comprehensive coverage
- Transparent refund policy
- Medical assistance eligibility
- More economical options
- Clarity around restrictions

TRAVEL AGENT

- Keeping travelers well informed
- Support and honesty
- Highly responsive, able to contact anywhere, anytime
- Safety & security
- Advice & expertise

While we anticipate the arrival of mass therapeutics and eventually, a vaccine, there are five key areas where travel sellers and suppliers can act to fuel leisure traveler confidence:

- **Dynamic and Diversified Offerings** – re-evaluate your current portfolio and look for ways to explore and test new travel niches such as catering to celebratory milestones and more customized international immersion experiences with partners. Consider adding pandemic insurance and other helpful health and safety services such as telemedicine and pharmacy networks to your repertoire. Create and test new smaller 'pod' size tours to lesser-known and waiting-to-be discovered destinations.

- **Proactive and Predictive Intelligence** – use permission-based collection practices to build out your customers' buying and traveling confidence profile with their intent and preference data. Apply real-time insights from supplier and government sources that correspond to your traveler's specific confidence persona. Consider adopting artificial intelligence algorithms to enable more predictive analysis around traveler needs and requests. For example, create a top customer permission-based profile by evaluating inbound email requests, site search and social media behavior to gauge likely appetite for various modes of transit and things to do during a holiday getaway.

- **Empowered and Informed People** – train and enable your staff to work remotely and access their tools with mobile responsive devices. Offer continuous coaching and support so they can deliver empathy, act consultatively and respond quickly with dynamic information around COVID-19. Provide best practices and reliable and instant access to information so agents and customer support teams can create a positive and credible repour with travelers through messaging and chat platforms as well as call centers.

- **Transformed Systems and Channels** – initiate and/or upgrade your digital touchpoints to convey your human touch. Ensure the right data and content can be accessed and deployed in each channel throughout your organization. For example, programming your customer facing chatbot to communicate with the same care and concern while delivering straight talk in the same manner as your staff. Allowing agents to access and curate responses to commonly asked customer questions about COVID-19 through internal channels.

- **Consultative Customer Experience** – foster a nurturing approach to your overall leisure travel purchase flow. Ensure the right sources of information across supplier availability, COVID-19 status, governmental restrictions and policies, prevention measures, insurance and customization options are present for self-service as well as guided consultation by an agent. Consider integrating questions and helpful reminders about transit and lodging choices, destination possibilities and insurance options in email, phone and messenger communication channels throughout the shopping experience.

Millions of travelers are out there dreaming of their next adventure in Destination X. They need all of us to help them successfully navigate through the changing border restrictions, capacity and other operational twists and turns in their path to make it happen.

Healthy traveler appetites now can only lead to strong business demand ahead. Seizing this opportunity requires a willing entrepreneurial spirit and the courage to change from top to tail.

Recovery will come. Rethinking travel is the first step.

7 Methodology & Resources

Survey Recruitment

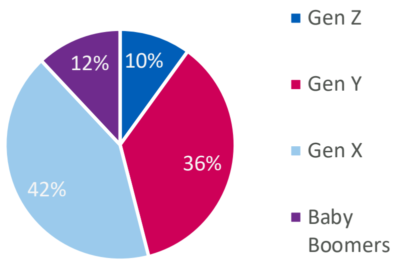
Participants were recruited via targeted messages from a pool of CheckMyTrip Android and iOS application users, who had at least one active session 90 days prior to the start of the survey. The recruitment period took place between 05 and 26, May 2020.

To qualify for the survey, participants were required to be at least 18 years of age and state that their primary purpose for future travel was either leisure or a mix of leisure and business (business only responses were excluded for the purposes of this study).

Survey Participants Profile

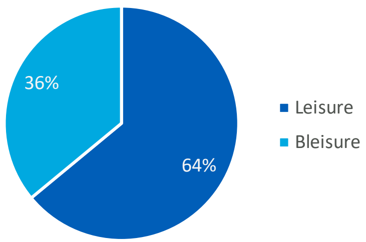
AGE BREAKDOWN:

- Generation Z (18-24 years old) = 10%
- Generation Y (25 – 39 years old) = 36%
- Generation X (40 – 59 years old) = 42%
- Baby Boomers (60 years old and up) = 12%



PRIMARY TRIP PURPOSE:

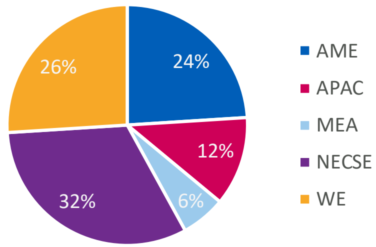
- Leisure Travel = 64%
- Leisure & Business Travel = 36%



GEOGRAPHIC BREAKDOWN:

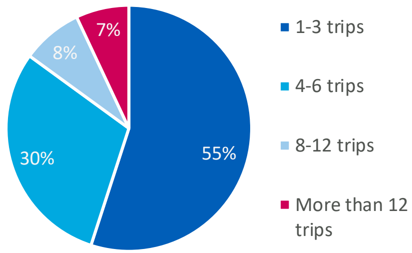
Survey participants hailed from 40 countries around the world. Their regional breakdown is as follows:

- Americas (AME) = 24%
- Asia Pacific (APAC) = 12%
- Middle East Africa (MEA) = 6%
- Northeastern, Central Southeastern Europe (NECSE) = 32%
- Western Europe (WE) = 26%



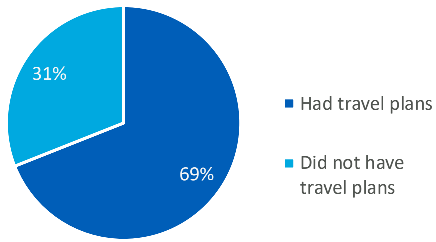
ANNUAL TRIP FREQUENCY PRIOR TO COVID-19:

- Once in a while (1-3 trips) = 55%
- About every other month (4-6 trips) = 30%
- Almost once per month (8-12 trips) = 8%
- Once a month or more (+12 trips) = 7%



TRAVEL PLANS BETWEEN JULY and DECEMBER 2020:

- Had travel plans = 69%
- Did not have travel plans = 31%



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