COVID-19 Travel Impact Analysis
Identifying the Inflection Point

By Sara Pastor, MD Destinations Europe
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Global YoY Trend – Hotel Bookings

All combined, the hotel industry is losing about 75% of bookings in relation to last year.
Some good news... China

All Traffic To China - Domestic vs Inbound

* the index shows the relative searches and bookings compared to bookings for Jan 2 – each set of bookings (e.g., Inbound) is indexed relative to itself
Europe trends
Origin: Global, Hotel Bookings Business vs Leisure

*the index shows the relative bookings compared to bookings for Jan 2 – each set of bookings (e.g., business hotels) is indexed relative to itself*
Europe trends
Origin: Global, Hotel & Flight Searches in the next weeks

20 Week Forecast
Europe Trends

Bookings to date indicate a very small number of flights departing to Europe beyond April.

**Flight Departures from Bookings Made to Date**

17-25 Mar 2020, Indexed to 17 Mar

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<th>Index</th>
<th>2019</th>
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Note: Weeks matched YoY for the analysis

1 = base value, above growth, below negative in relation to base value (e.g: 1.1 = 10% growth)

EU bars most travellers from outside

Large gap against last year

2020 curve far from closing the gap
Europe Trends
For Hotels, future check-in dates increase in late May and in September

Hotel Planned Check-ins from Bookings Made to Date
17-25 Mar 2020, Indexed to 17 Mar

Indexed to 17 March
EU bars most travellers from outside

Is Apr-May a converging point for hotels?

1 = base value, above growth, below negative in relation to base value (e.g: 1.1 = 10% growth)
Note: Weeks matched YoY for the analysis
Key Indictors to identify the Inflection Point

- Searches & Bookings (Hotel & Flight)
- Historical & Future
- Domestic/Proximity (short term - micro) vs Inbound (mid/long term - macro)
- China trends
- Business/Leisure – Families/Couples/Solos
- Other Indicators: Air Capacity & Security Perception Index
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