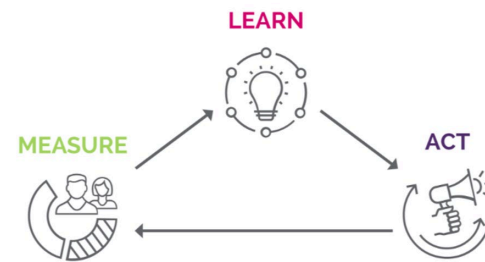




# COVID-19 Travel Impact Analysis

## Identifying the Inflection Point

By Sara Pastor, MD Destinations Europe  
April 24<sup>th</sup> 2020

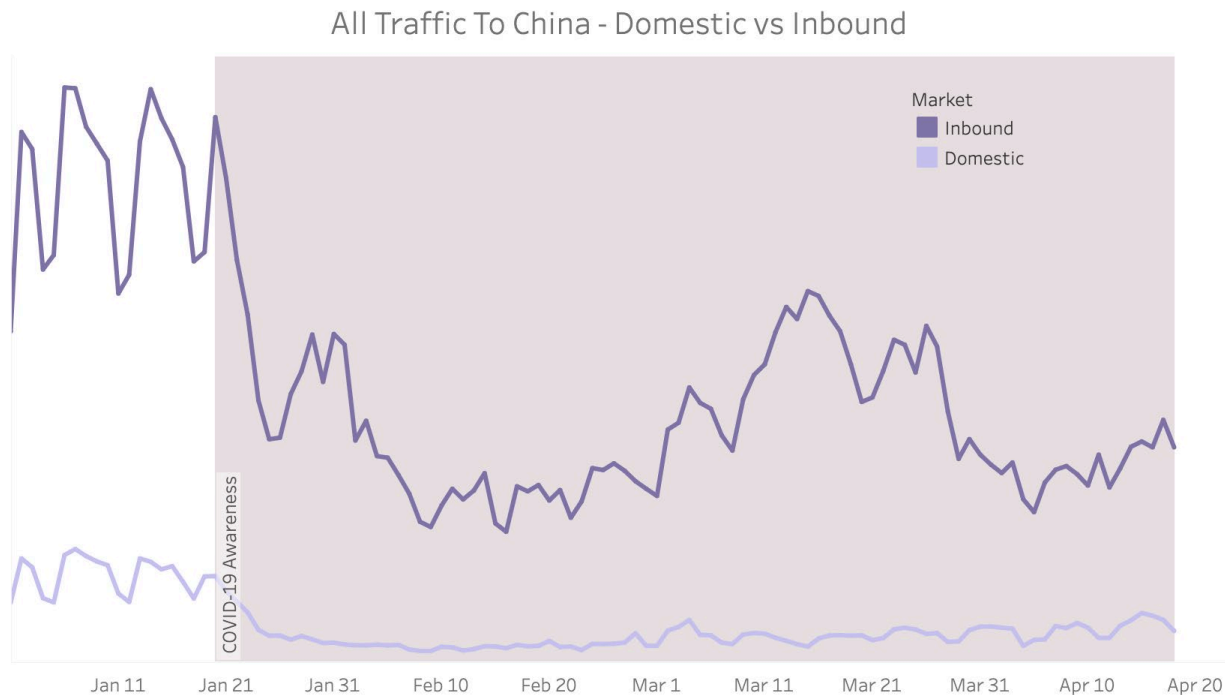


# Global YoY Trend – Hotel Bookings

All combined, the hotel industry is losing about 75% of bookings in relation to last year



# Some good news... China

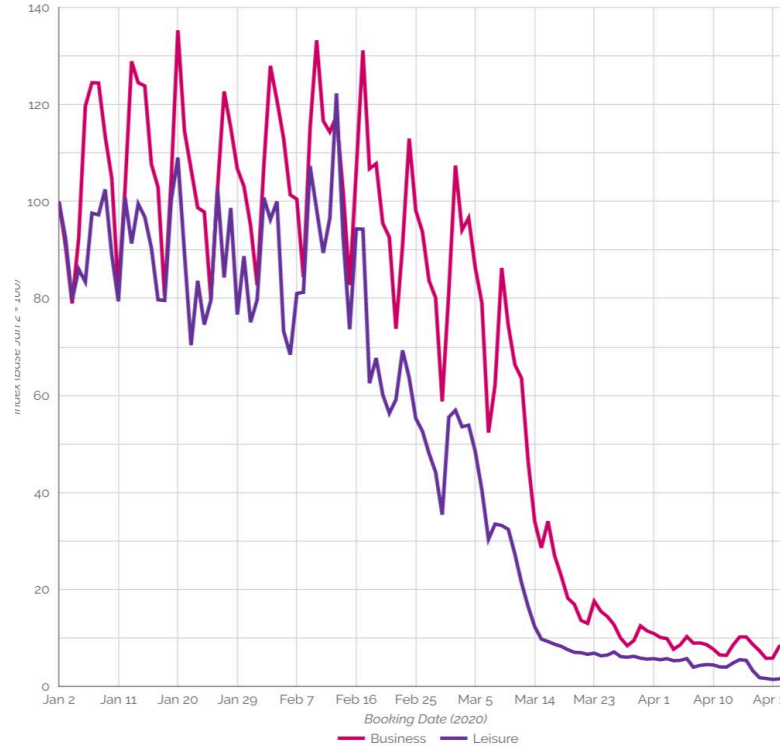


\* the index shows the relative searches and bookings compared to bookings for Jan 2 – each set of bookings (e.g., Inbound) is indexed relative to itself

# Europe trends

Origin: Global, Hotel Bookings Business vs Leisure

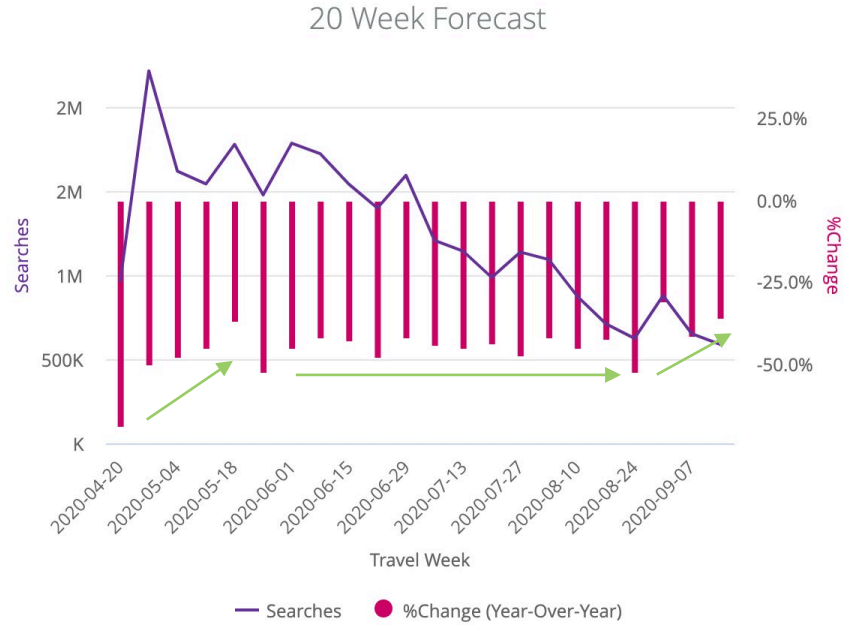
## Hotel Volume by Purpose



\* 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

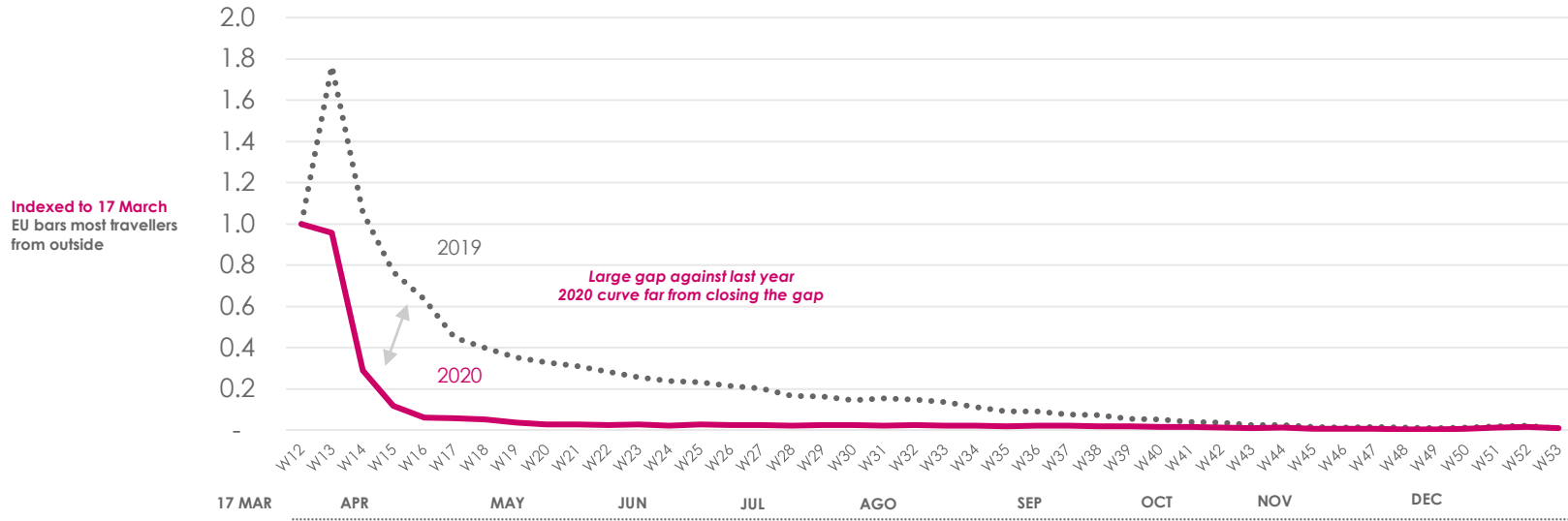


# Europe Trends

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

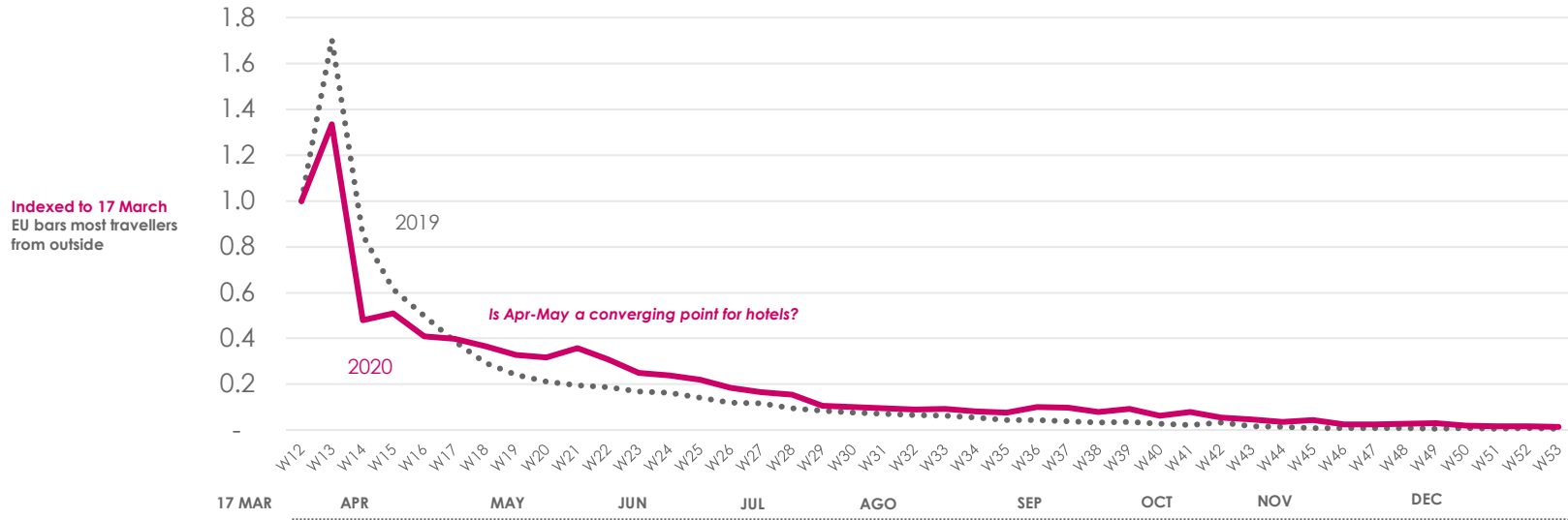


# Europe Trends

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



# Key Indicators to identify the **Inflection Point**

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



# Sara Pastor

- Managing Director, Destinations EMEA
- Email: [sara.pastor@adara.com](mailto:sara.pastor@adara.com)
- <https://www.linkedin.com/in/sarapastor/>

