IF MARKETS COULD TALK...

UNDERSTANDING OUTBOUND LEISURE TRAVEL IN THE COVID-19 ERA

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TRAVEL PLANS IN THE COVID-19 ERA
Less consumers now want to cancel their trip due to Covid-19

If you had planned an international leisure trip for 2020, how did COVID-19 affect your plans?

- **I cancelled my trip completely**: 37.1%
- **I rescheduled it for another date**: 36.1%
- **I changed the destination so I can drive as opposed to fly**: 5.9%
- **I changed my trip from international to domestic**: 6.5%
- **I did not cancel my trip but made some alterations to the initial planning (i.e. type of accommodation or transport)**: 5.9%
- **It did not affect me at all**: 8.6%

**Wave 1 Date:** 13 & 14 May, 2020  
**Sample Size:** 2750 respondents  
**Wave 2 Date:** 25 June, 2020  
**Sample Size:** 3000 respondents
I will book or reschedule the leisure trip I have been dreaming about all this time.
I will be willing to travel again soon, and I will consider my options while being constantly updated.
I will be somewhat hesitant to travel, and I will consider it at a later stage.
I will not consider travelling at all as I am still very concerned.

Fill in the sentence with the phrase that suits you the most. When international travel bans are lifted...

Appetite for outbound travel is growing

Willing to travel internationally again soon

May 2020

June 2020

Wave 1 Date: 13 & 14 May, 2020
Sample Size: 2750 respondents

Wave 2 Date: 25 June, 2020
Sample Size: 3000 respondents
More consumers expect to travel soon. But will they?

When is it most probable to undertake your next international trip for leisure?

- This month: 4.1%
- 1-3 months: 20.5%
- 4-6 months: 32.9%
- 7-12 months: 25.8%
- In more than a year: 16.6%

More likely to travel outbound for leisure in the next three months (until September 2020): +24.7%
More likely to travel outbound for leisure in the next six months (until December 2020): +57.6%

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CONCERNS AND FACTORS FOR OUTBOUND TRAVEL
Health-related issues still top but personal finances more of a concern

What concerns you the most in relation to travelling within 2020?

- Sudden quarantine measures during my trip: 22%
- Becoming ill in transit or at the destination: 19.8%
- Transport and accommodation health policies: 14.1%
- Economic concerns and impact on personal finances: 13.2%
- Transport and accommodation booking and cancellation policies (refunds, etc.): 11.7%
- Limited options in destination (closed restaurants/bars or cultural-historical sights, etc.): 10.7%
- Transport and accommodation costs: 8.2%
- Other: 0.3%
In-destination experience primary H&S concern for travelers

In relation to health and safety, which parts of your international journey will concern you the most?

- **Air travel**: 30.2%
- **Attractions, tours, and activities (museums, theme parks, shopping malls, etc.)**: 21.7%
- **Accommodation – hotels and resorts**: 17.0%
- **In-destination transport (metro, bus, taxi, etc.)**: 12.6%
- **Marine transport (ferry boat, cruise ship, etc.)**: 8.8%
- **Food and beverage outlets**: 5.7%

Wave 1 Date: 13 & 14 May, 2020
Sample Size: 4306 responses

Wave 2 Date: 25 June, 2020
Sample Size: 4669 responses
Lifting travel restrictions now more important than finding a vaccine

Which factor is most important to start travelling again internationally?

- Fully lifting travel restrictions: 13.9%
- Finding a vaccine: 13.6%
- Pre-flight rapid Covid19 tests: 11.9%
- Destinations’ effectiveness towards the COVID-19 health crisis: 11.6%
- Clearly indicated health & safety protocols during transport: 10.2%

Wave 1 Date: 13 & 14 May, 2020
Sample Size: 7117 responses

Wave 2 Date: 25 June, 2020
Sample Size: 7658 responses
Flexibility remains significant – less crowded flights gain popularity

Which factor is most important to start travelling again internationally?

- Flexible cancellation policies: 9.3%
- Less crowded available seats in flights/transport: 9.2%
- Clearly indicated health & safety protocols in accommodation properties: 8.5%
- Bargains and deals: 6.7%
- Partially lifting travel restrictions: 4.9%
- Other: 0.20%

Wave 1 Date: 13 & 14 May, 2020
Sample Size: 7117 responses

Wave 2 Date: 25 June, 2020
Sample Size: 7658 responses
OUTBOUND LEISURE TRAVEL IN THE COVID-19 ERA

INSIGHTS PER SEGMENT

18-24 & >54 age segments show similar behaviours and are hesitant to travel due to the Covid-19 crisis.

35-54 age segment has greater appetite and is more probable to resume outbound travel within 2020.

Not all higher income respondents intend to resume outbound travel soon (UK and Italy being the exceptions).

Flexibility in booking and cancellation is gaining momentum, especially for European markets.
WHAT DO TRAVELERS EXPECT FROM DESTINATIONS
Safety prevails while affordability is on the rise

Which of the following destination attributes are more important compared to last year?

- Safety: 15.7%
- Affordability: 13.4%
- Relaxation/ease of mind: 12.4%
- Fun: 10.4%
- Comfort: 9.6%
- Adventure: 8.4%
- Discovery: 7.6%

Wave 1 Date: 13 & 14 May, 2020
Sample Size: 6454 responses

Wave 2 Date: 25 June, 2020
Sample Size: 7193 responses
Which of the following destination attributes are more important compared to last year?

- Easy access: 4.8%
- Authenticity: 4.7%
- Luxury: 3.4%
- Privacy: 3.3%
- Togetherness: 3.3%
- Simplicity: 3.1%

25 June 2020

Wave 1 Date: 13 & 14 May, 2020
Sample Size: 6454 responses

Wave 2 Date: 25 June, 2020
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Authenticity considered more important than luxury
Overall expecting Safety, Affordability, Relaxation and Fun

Wave 1 Date: 13 & 14 May, 2020
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KEY TAKE AWAYS
Expect appetite for outbound travel to be converted into demand not before travel restrictions are fully lifted or at least, streamlined.

Focus also on in-destination experience (attractions & transport) as it is a growing safety concern among travellers.

Delivering and communicating safety in a creative and positive way as well as staying loyal to the promise for carefree vacations can help to build competitive advantage.

Developing a learners mindset and culture is a key element to thrive in the “New Normal”.
Thank you!

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