



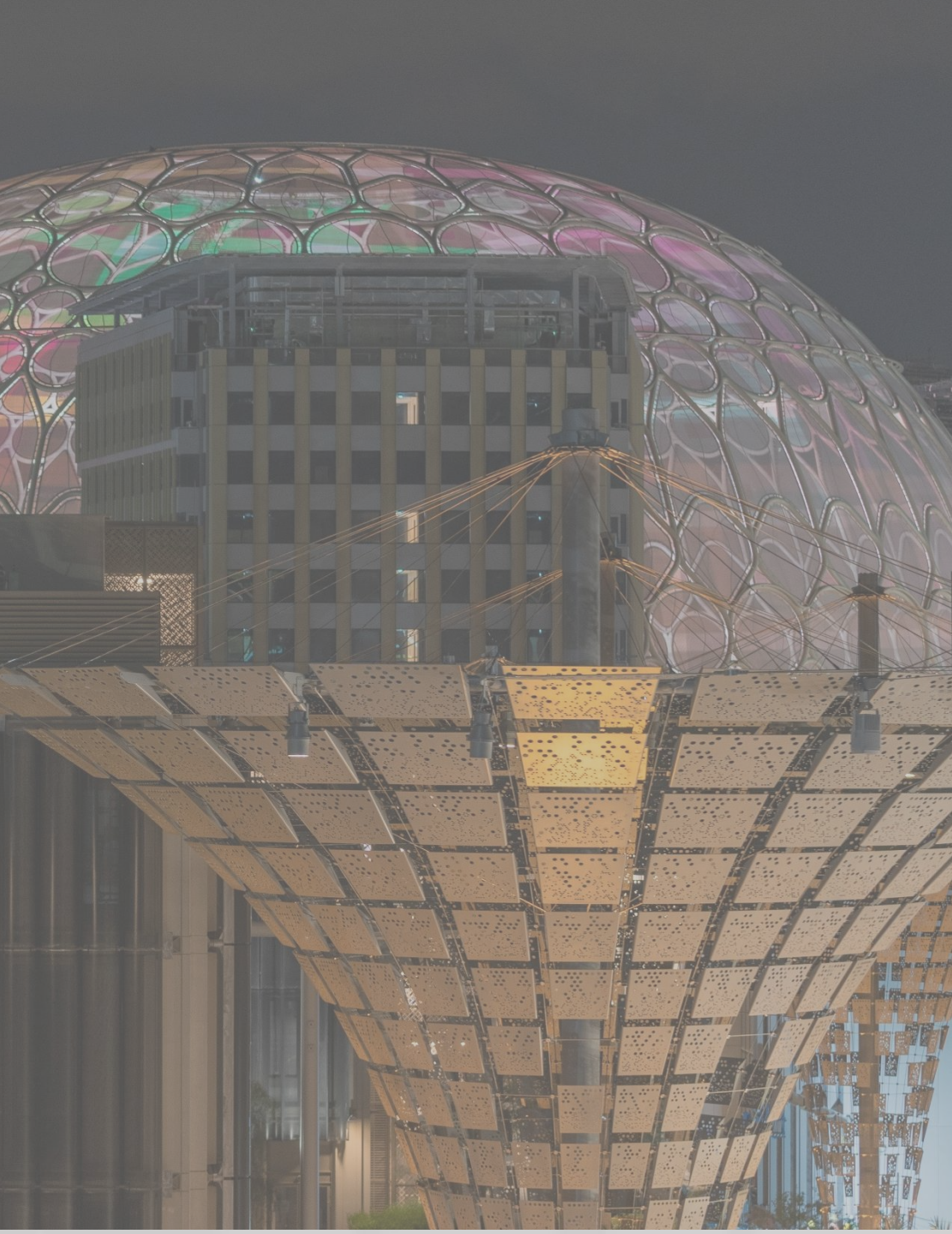
ATR Research-Wave 1

August 2020

ATR RESEARCH

KEY INSIGHTS

- The pandemic impacted most countries around the world, Expo 2020 key source markets being the most impacted.
- In terms of offer, **health & safety precautions** remain the key changes introduced in the market. While some players are focusing on **domestic market** and adding **COVID-19 testing** to their offer.
- Due to market uncertainty, **booking window got shorter** for the majority of travelers as a result of COVID-19.
- **68%** don't expect the market to recover to 2019 levels before **Q3 of 2021**, while they agree on the fact that domestic and short haul markets would show the most potential in a post-COVID world.



DETAILED INSIGHTS

COVID-19 IMPACT ON TRAVEL MARKET

IMPACT ON DESTINATIONS

The pandemic impacted most countries around the world, Expo 2020 key source markets being the most impacted.

MOST IMPACTED SOURCE MARKETS

Rest of the world



18%



17%



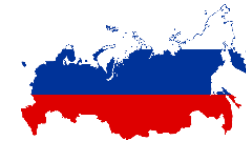
15%



14%



13%



9%



13%

POST-COVID MOST SEARCHED DESTINATIONS

Rest of the world



26%



13%



12%



11%



9%



9%



7%



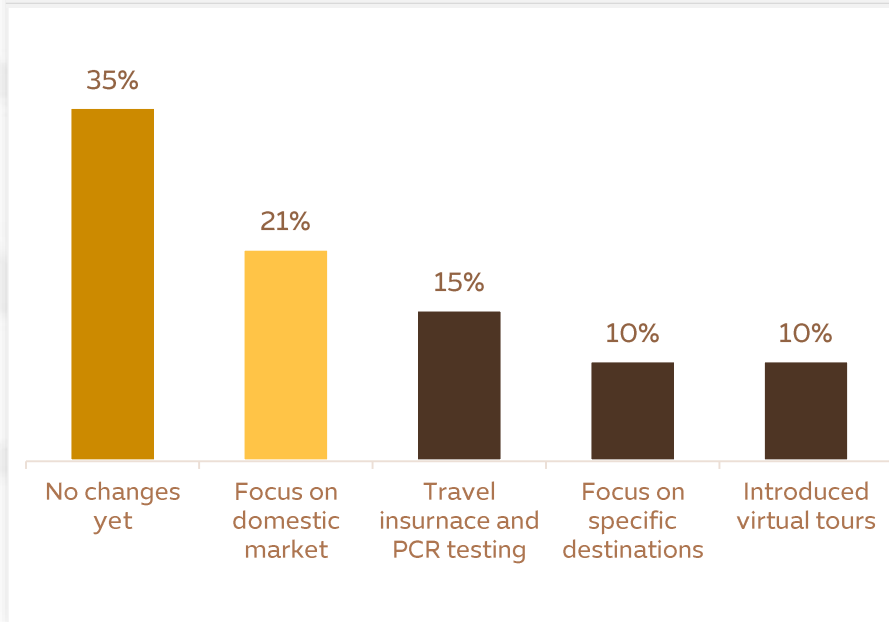
12%

COVID-19 IMPACT ON TRAVEL MARKET

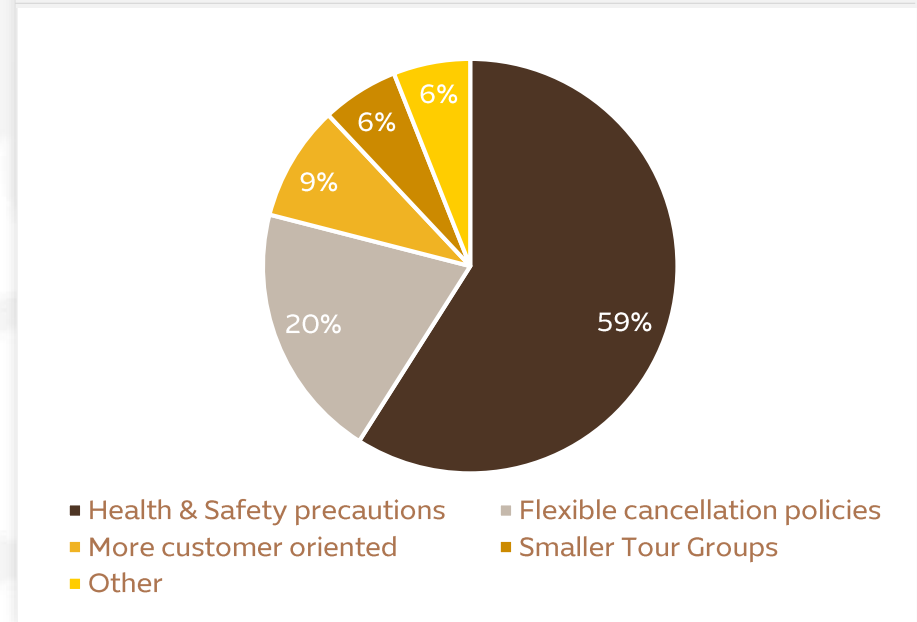
IMPACT ON OFFER AND BOOKING BEHAVIOR

- Due to market uncertainty, booking window is shorter for the majority of travelers.
- 1 in 3 ATRs are still monitoring the pandemic situation and haven't introduced new products. Some players state focusing on domestic market and adding COVID-19 testing to their offer.
- In terms of customer experience, health & safety precautions remain the key changes introduced by market players.

KEY CHANGES INTRODUCED IN PRODUCTS



KEY CHANGES INTRODUCED IN CUSTOMER EXPERIENCE



74%

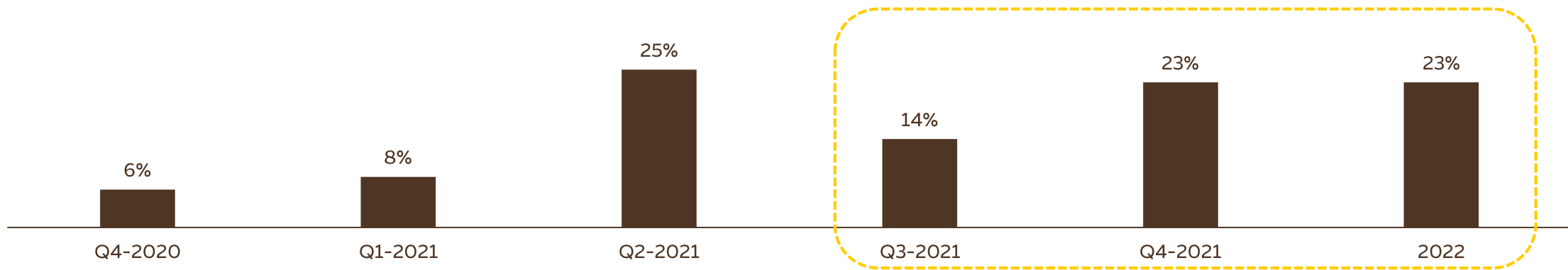
of tourists book **later** than they used to before COVID-19

MARKET RECOVERY

EXPECTED RECOVERY AND SOURCE MARKETS

- 68% don't expect the market to go back to pre COVID levels before Q3 of next year.
- ATRs agree on the fact that domestic and short haul markets would show the most potential in a post-COVID world.

EXPECTED RECOVERY TIMELINE



MOST TARGETED SOURCE MARKETS

20%



19%



14%



12%



11%



8%



KEY DRIVERS TO TARGET THESE SOURCE MARKETS

"These markets show high potential for UAE"

"short and medium haul markets, we will be monitoring COVID-19 situation"

"We expect these countries to have a better chance of opening for travel"

"We will focus on domestic tourism for now and monitor the situation"



EXPO
2020
DUBAI
UAE