



INTRODUCTION TO THIS DOCUMENT
COVID-19 Travel Insights Report by MMGY Global.

OUR TAKE-AWAYS:

This is what we learned from this document:

- **Travel sentiment, activity and spending will return more quickly than many have predicted.**
- **Most bookings have been shifted to July and beyond as opposed to being cancelled completely.**
- **Advisors are working on learning opportunities they didn't have time for before, including training sessions and webinars.**

Shifting from Reaction to Action

In the past three weeks, our industry has been forced on its heels, reacting to a crisis that continues to evolve by the day, if not by the hour – something particularly evident in the [North American COVID-19 Industry Barometer](#) we released last Wednesday. In this first issue of our weekly report, we believe it is time to turn the corner from reaction to action. We hope the resources included in this and forthcoming issues, as well as our [online resource hub](#), can help serve as tools to do just that. As CEO Clayton Reid indicated in his recent [Looking Past This Crisis -The Future State of Travel](#) POV piece, it is not too early for us to begin preparing for a rebound. We see this taking shape across four key tenets:

1. **Travel sentiment, activity and spending will return more quickly than many have predicted.**
2. **Consumer media and search behavior are shifting, but these trends are only short-term.**
3. **It is important to stay nimble in marketing for now, but prepare to return to normalcy quickly.**
4. **If you follow the data, we can, in some ways, predict how the industry rebound will unfold.**

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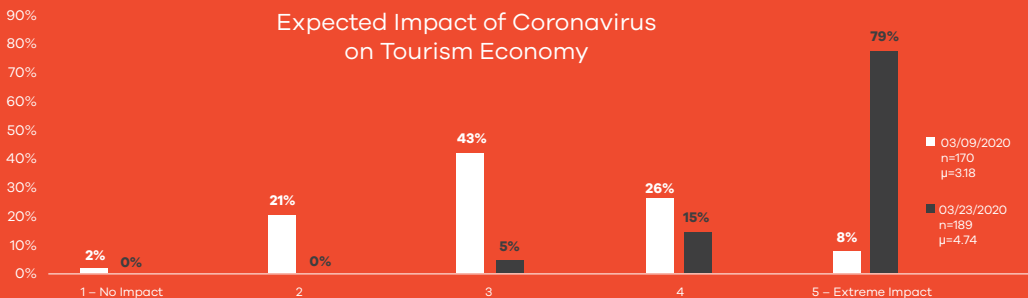
To hear our recent Leadership Roundtable Discussion

GLOBAL TRAVELER SENTIMENT

Using social listening as a tool, we can gain insight into the mindset of travelers globally. Indicators suggest that there will be pent-up demand for travel following this crisis. Online conversations about travel cancellations have decreased 30% in the last week, while mentions of needing or wanting a vacation are up by 130%.

NORTH AMERICAN DMO BAROMETER

Last week, MMGY Travel Intelligence and the Destinations International Foundation released the second of a multi-wave study on the impact of the coronavirus (COVID-19) outbreak on North American destination organizations. The survey, designed to track the shifts in how destinations are reacting to the crisis, has (not surprisingly) revealed a dramatic swing in the impact just two weeks since the first wave was released. The survey indicates that more than 80% of destination organizations have now reduced or postponed sales and marketing spending, up from less than 20% in wave one, the percentage of destinations reporting coronavirus-related postponements and/or cancellations of conferences, meetings, or events surged from under 40% to almost 100%. In addition, the percentage of respondents expecting COVID-19 to have an extreme impact on the tourism economy shifted from just 8% to 79%. The third wave of this survey is in the field now, and you can [download all reports here](#).



Adjusting Your Messaging Strategy and Preparing for Recovery

As we build toward recovery, travel brands should consider a strategy that outlines how messaging adjusts from now through an eventual travel rebound. MMGY Global recommends a four-phased approach based on key traveler behavior periods beginning with **Wait**, which is where our industry is today. We see the recovery period in two phases – **Ready** – where we start to see travel planning return and begin to take shape, and then **Set** – where we begin to encourage travelers to get out and explore again. Finally, **Go** – where travel consumption picks up to a regular cadence again.

TRAVEL JOURNALISTS REMAIN INTERESTED IN POSITIVE STORIES

While the media landscape has transformed in a matter of weeks, the good news is many writers are receptive to pitches and client news. Below is some of the feedback we received from a recent audit of our media contacts:

- Pitches should be extremely thoughtful, relevant, “in good taste,” and personalized.
- Journalists are doing virtual meetings in lieu of desksides, especially when it comes to an upcoming opening/launch.
- Many writers are receptive to potential summer press trips so long as there is flexibility with cancellations given the uncertainty of the current situation.
- There is an appeal in covering human interest stories that share positive stories emerging from the travel industry.
- “Armchair travel” has become a buzzword. [Condé Nast Traveler](#), The Daily Beast, [The Telegraph](#), [Travel + Leisure](#), [Smithsonian](#) and [Fathom](#) have been using this buzzword in their editorial requests and coverage.
- Travel inspiration for the future is important. The Sun U.K. launched a column, [“Wish We Were Here.”](#)

We are monitoring journalists’ media coverage interests daily and talking with our close contacts so that we can continue to provide timely information. [Read our full post here.](#)

WHAT TRAVEL TRADE NEEDS FROM THE INDUSTRY RIGHT NOW

When travelers return to activity, travel advisors will play a key role in driving distribution in an environment with wide availability. With the cruise lines in a holding pattern, destinations and destination resorts have an opportunity today to present content to advisors.

This week, we hosted our first virtual roundtable with AFAR advisors, which led to the following takeaways:

- Advisors are working on learning opportunities they didn’t have time for before, including training sessions and webinars.
- The majority of bookings have been shifted to July and beyond, as opposed to being canceled completely.
- Passengers are being encouraged to take future credits rather than full refunds so that they may travel in the future.
- Virtual tours and interviews with expedition leaders will be effective content.

[Read our full post here.](#)

U.S. TRAVELER PULSE

MMGY Travel Intelligence and the U.S. Travel Association announced a partnership to conduct a biweekly study of U.S. business and leisure travelers, measuring current and future traveler sentiment amid the COVID-19 pandemic and tracking trends and shifts in travel intentions. The study will poll respondents for both domestic and international travel intent by purpose and type. The first wave of results will be shared later this week.



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