Tours & Activities Marketing Battle Plan 2021

Marketing Through the Crisis.

Over 200 pages of in-depth market research & statistics of real traveller intent within North America, UK & Ireland, Europe & Oceania.

Chris Torres
February 2021

tma. tourism marketing agency

What we cover in this report

As every destination around the world has been affected by this pandemic in some form or another, the last year has been devastating and heartbreaking for almost everyone in the tourism industry — not just tours and activities. But I am not here to talk about what has just passed; I'm here to offer my thoughts on what I feel lies ahead. I, for one, feel the future is looking very bright indeed.

My business, the Tourism Marketing Agency (TMA), has been helping many operators throughout the world during this period; this is something for which I am extremely grateful and can't thank them enough for sticking with us. And, from what I can see, the future for tours and activities is a prosperous one — for most destinations, at least.

While the majority of us can't travel internationally right now, or even domestically, demand is as high as ever. Many operators are being inundated with enquiries and bookings for later in the year and into 2022. We see this trending across much of the industry.

To give you an idea of what I mean, here are just a few specific examples we've witnessed with our own clients. One of the companies we work with — a safari operator in Africa — received nearly 400 enquiries in two months; a UK-based chauffeur-driven tour operator received around the same number of enquiries. A company in Iceland received 324 enquiries in 3-4 months. I don't mention these to blow our own trumpet but to highlight that people cannot wait to escape and explore a new destination. Just because they can't travel right now does not mean they don't want to get out there as soon as possible.

When the doors do finally open on travel again, the pent-up demand will explode. The influx of international travelers will be so huge that some destinations will struggle to manage it. This is good news for tours and activities! The more footfall a destination has, the more chances you have of capturing the attention of a new customer and generating the revenue you need.

Based on conversations with our clients around the world at the start of the covid crisis, the threat of catching the virus, while playing on avid travellers' minds, was not the main deterrent to booking flights, accommodation, or experiences. The main fear was related to losing deposits they had already paid. But

has this mindset changed over the last year? With this document, we look to answer just that and much more.

My team and I have taken it upon ourselves to conduct market surveys with real consumers, asking the questions so many of us in the industry want to know. The insights gained from this research will better inform tour and activity providers on how to market their businesses in 2021, including which demographics and product types to focus on.

I shall first highlight a holistic view of current consumer intent from across the world, and then break this down into each of the regions where we conducted the research. This will cover North America, UK & Ireland, Europe, and Oceania, all broken down by age groups and other key demographic criteria. If you typically target travellers in any of these destinations, then the information in this document may prove invaluable.

We don't only take into account the current mindset of potential customers, but operators themselves. Part of this document covers the current mindset of tour and activity businesses, helping to predict what type of industry will emerge once this crisis is over. This will serve to better understand the challenges we all face and what strategies we can create to give us the best possible chance of survival.

And that is also one of the main aspects of this document. I will not simply provide you with a bunch of stats with no guidance on what you should do with them; I will give you my expert opinion on the strategies to take forward and the target demographics you should consider. You may see some repetition on the advice given in each region, but this is intentional as I suspect some of you will jump to a specific part of this document, so I want to make sure you do not miss out on anything important.

This document is not all speculation and theory; the focus on surveys and statistics allows us to provide facts about how your potential customers perceive the threat of COVID-19 and their travel intentions for 2021 and beyond.

I hope you find this useful and that it helps in some way to allow your business to make the right decisions in your marketing campaigns and even your product development.

Taking a look back at the Coronavirus Battle Plan

Chris looks back at the advice he gave in the 'Coronavirus Battle Plan – Marketing Through the Crisis' publication he released back in March 2020 to see what still stands up and what has changed.

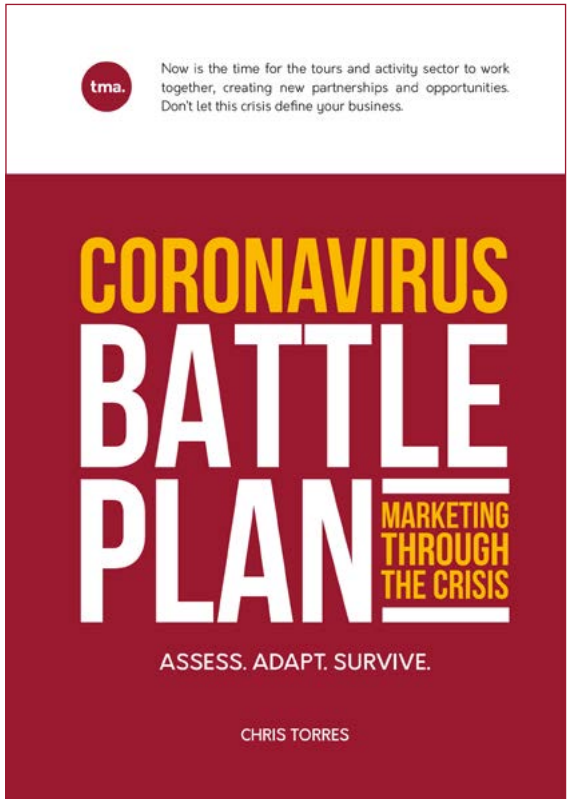
tma. tourism marketing agency

Back in March 2020, with the help of my team, I released the Coronavirus Marketing Battle Plan to provide whatever guidance and advice I could give to better prepare tour and activity providers and other tourism-focused businesses for what I saw as a long road ahead. This free guide was downloaded more than 3,000 times; as far as I'm concerned, it was worth the effort if it helped just one business.

At the time of writing, it is nearly a year on since I wrote the first Battle Plan, and a year into this devastating pandemic that has affected us all. So I wanted to look back and see if the advice I gave at the time proved to be accurate or if it missed the mark. This will now give me the opportunity, with nearly a year's more knowledge, to provide further guidance to help you focus for the year ahead. Let's go through the pressing concerns from a year ago, with the benefit of hindsight and experience.

Should I Stop Marketing?

In the original Battle Plan, I advised strongly against stopping marketing altogether. I argued that stopping marketing would be business suicide and I still believe this is so. Without marketing your business, you are effectively telling your potential customers that your company is dead. If that is the case, then you have my utmost sympathy. But if you have not been marketing for the last year and intend for your business to survive, then you are making it harder on yourself to compete for business when we can all travel again.



You can still download a free copy of the original Battle Plan here.

As I said back then, 'Failing to plan is planning to fail'. As this new Battle Plan will testify to, travel demand is huge. If anything, our desire to travel and be 'somewhere else' other than the four walls we have been confined to has grown exponentially because of the various lockdowns we have experienced. This is the perfect time to market to your potential customers while all they can do is dream of the destinations they could be visiting and the activities they wish they could be doing.

I get that some of you may think that you can't afford to market during a pandemic; that is a natural response. But with so many platforms and strategies you can implement for free, there really is no excuse not to do some form of marketing. Using the pandemic as an excuse not to market your business is what we refer to in coaching circles as 'below the line behaviour'. Writing a blog, posting on social media, creating a video on your smartphone and publishing to YouTube, your website, social media, etc, can all be done for free. The only cost is your time...and, let's face it: time is what we have right now.

If you won't tell your story, you can't sell your story. Marketing should never stop; it's only how you respond to market conditions that changes.

Should I Even Mention Coronavirus in my Marketing?

Again, as mentioned in the original battle plan, you should not shy away from mentioning coronavirus, covid, or COVID-19 in your marketing — just take your pick as to what you want to call the virus. As this new battle plan will highlight, 57% of travellers surveyed will not book with a company if they do not have a Covid Guarantee Policy or some form of guidance on the matter. Only 4% of travellers indicated that such a policy is "not important" in booking decisions.

Before this pandemic, building trust with your potential customers was key to generating bookings. This is now more important than ever because of the pandemic. And one thing I will advise on now is that these Covid Policies will not go away when we are back to some form of normality; they are here to stay. Consumers will now expect the same assurances from now on.

Online Travel Agents (OTA) vs Direct

It is no secret that, even before the pandemic, I always say that OTAs can help a business immensely, but far too many operators rely on them too heavily. That thinking has been proven correct in the past year; those operators who are heavily reliant on OTAs have been the worst affected. Having no say in cancellation policies, not having the ability to postpone trips for another date or, in a lot of cases, not being able to market to your customers directly, has had an adverse effect on many operators.

OTAs are also struggling to market to locals as this is not what they were 'built for', with international travellers having been their main focus from day one. Local and domestic travel is set to increase over 2021 and, going by the responses in this Battle Plan, this is what most consumers are focusing on. I will say it now: if OTAs eventually dominate local and domestic markets, then tour operators may as well be resigned to the fact that they will no longer run independent businesses; they will instead be the 'Uber driver' that sits behind a brand name not of their making. You may be happy with this, but I know many Tourpreneurs* will not be and we cannot let this scenario happen.

While nothing is guaranteed, focusing on direct sales and being closer to both your customers and your revenue streams is the only way to make sure you are in control of your business's future.

The only exception to this thinking is Airbnb. They are in a unique position to cater for international as well as domestic markets. The difference between Airbnb and, say, Tripadvisor, is that no one says they are going to "Tripadvise it" when searching for things to do; they would tend to search on Google first. However, with Airbnb, consumers would "Airbnb it" as they would tend to search on Airbnb and bypass Google altogether. This is why, in my mind, Airbnb could win the OTA 'war'.

Marketing During the Crisis

As mentioned in the first battle plan, maintaining brand awareness, giving your customers peace of mind, and planning for life after the crisis is key to the survival of your business. This has not changed in the last year.

*Term coined by Shane Whaley of the excellent Tourpreneur podcast. https://tourpreneur.com

As advised, ramping up customer service, postponing dates as much as possible, not fighting against cancellations, creating flexible cancellation policies and early-bird offers, and promoting products that cater for a staycation market, have all been proven to be the right strategies.

Although bookings are lower than normal, they are happening. In fact, we have seen a huge increase in booking enquiries with an interesting trend: consumers are going back to having conversations with tour businesses again, just like they did in pre-online booking days. They are looking for peace of mind. Having this extra support may now become more important in the years to come.

Other advice I gave was to focus on the over sixties, students, team-building/corporate, families with children, people with birthdays or anniversaries, front-line staff, and adventure seekers.

It is safe to say that the over sixties are more connected now because of the pandemic. This demographic is now more comfortable purchasing their groceries online, doing their banking online, and opening up social media accounts, all because they had to. If anything, this pandemic has pushed this demographic in terms of technology by about 5-10 years. This will most certainly impact how they book travel in the years to come.

Any opportunity students get to 'live life again' they grasp with both hands. We have seen this in destinations around the world, be it for good or bad. Mental health has been, and will continue to be, a massive issue in the months and years to come. Team-building and corporate days will most certainly increase after the pandemic. Families with children, especially those who have been homeschooling for a long period of time, will want to escape and let their kids be kids again... believe me, I know. It has been hard on them at times.

The point I am trying to make here is that experiences, activities, things to do away from your home... these will only increase in popularity. Our industry is primed to explode with demand. Just make sure you are marketing to your target audience so that you can get a piece of this pie, too.

Potential focus on self-guided

Self-guided was the fastest-growing sector in tours and activities in 2019 and this is only set to increase further in the years to come. In fact, as you'll see in the research we conducted, self-guided is what a lot of travellers are looking for right now. If you do not cater to this demand already, it may be time to start thinking about adapting your products for this growing market. This does not mean you need to sacrifice your in-person tours as they will always be in demand, but more and more people will be looking for self-guided tours in the immediate future. If you can organise full-blown multi-day trips or a day tour through an AI tour guide, audio tour, or some other means, I urge you to investigate this. It can help you generate a passive income, leaving you to focus on your face-to-face customers. If a self-guided customer loves your product, then this may spur them to also take an in-person tour with you.

What We All Misjudged

When we published the first battle plan, I predicted that the covid crisis would impact our industry for the next 6-18 months. It's safe to say that the travel industry, as a whole, will be impacted for far longer than 18 months. We will discuss timelines around the world in the next section, bringing in the vaccination predictions that could impact border restrictions over the next two years.

Final Thoughts

I am proud to say that a lot of the advice I gave in the first battle plan has held up. Much of this advice was driven by how my team and I understand consumers' purchase habits from various destinations around the world. My agency customer base is 90% international (we are based in Scotland, UK); in fact, this is one of our USPs since not many tour-focused marketing companies have such wide knowledge of international markets. But I wanted to take this insight we already have a step further.

The guidance in this next edition of the Coronavirus Battle Plan is not just driven by our knowledge, experience, or instincts; this edition taps into the data from conducting surveys with 2,000 potential travellers plus 500 tour and activity providers. My hope is that the real-life statistics included in this document will help you make better-informed

decisions on how to market your business going forward, as well as highlighting potential business opportunities.

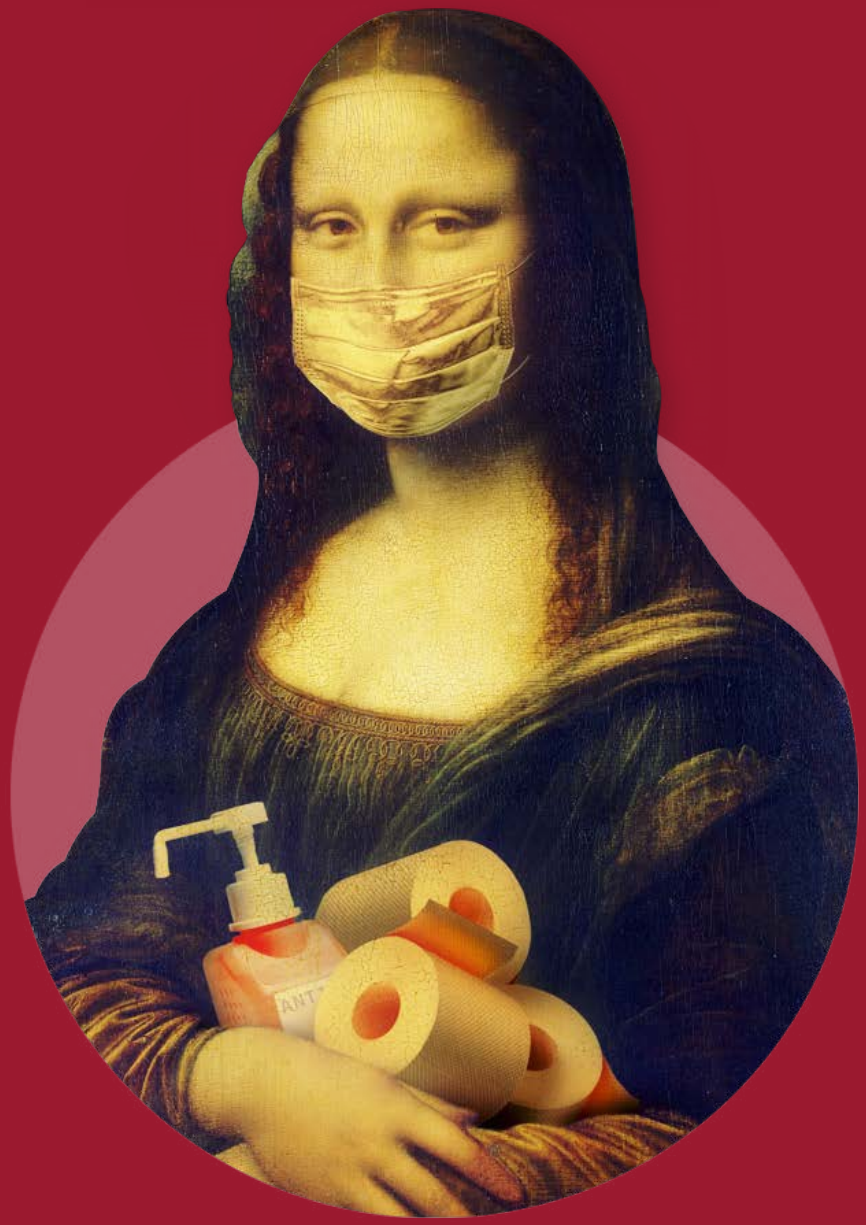
Whatever direction you decide to go, just make sure you give yourself the best possible chance to succeed, and don't let 'below the line behaviour' destroy everything you have worked so hard to achieve thus far.

Assess. Adapt. Survive... And stay strong!

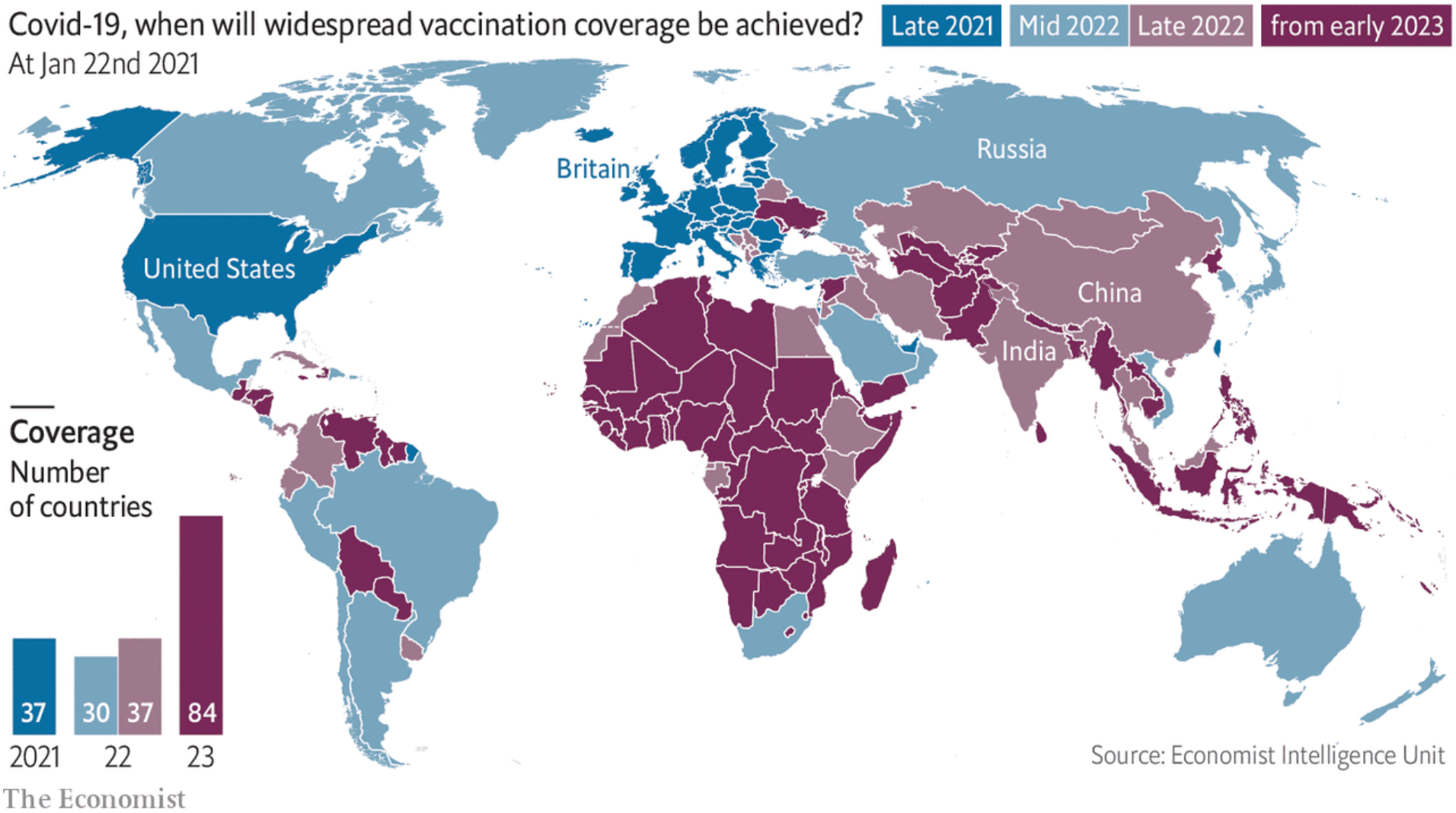
Covid Vaccination Coverage Map

Vaccination Roadmap

Created by The Economist, this map highlights when worldwide vaccination coverage should be achieved. It is important to note that this is a speculative prediction of vaccine coverage, which could indicate when destinations will be open to international travellers, but it does not offer the complete picture.



tma. tourism marketing agency



Source: The Economist – View the full article here.

On 28 January 2021, The Economist published this map of the current rollout of COVID-19 vaccinations and when they are most likely to be completed in different countries. Of course, no one has a crystal ball and lots of things can happen in the next 12 weeks — nevermind the next 12 months.

While this is a speculative prediction of vaccine coverage, which could indicate when destinations will be fully open to international travellers, it does not offer the complete picture. For instance, many countries who cannot afford to vaccinate their population as quickly are still likely to open their doors to vaccinated travellers, enjoying the boost tourism can offer their economy.

Before this was published, I produced an episode of my show, The Digital Tourism Show, that you can see here, which advised that local/domestic will be the main focus for 2021, short-haul international travel for the second half of 2021, and long-haul international travel in 2022. Based on this vaccination map, that line of thinking seems correct, but there are destination-specific nuances that you can review later in this document.

One thing this map tells us for certain is that covid isn't going to disappear by the end of 2021, like so many of us had hoped. Even once travel is open again, we can expect changes and disruptions as virus variants emerge and vaccine production and distribution is delayed. Put more succinctly: if the last year has taught us anything, it is that plans change and we need to be ready for whatever comes our way. Resources like this vaccination map are fascinating and useful, but vaccination alone won't bring the tourism industry back to its pre-covid levels.

If you look at the map, most of Africa, some countries in Asia, and some in South America may not have distributed the vaccine fully until 2023. If everyone of these countries keeps their doors closed to tourism until their population is vaccinated, it will be a huge blow for businesses that are reliant on long-haul international travellers. However, as I stated above, the reality is that countries will make their own decisions about the risks and gains of allowing vaccinated international tourists into their country before their own vaccinations have been fully rolled out. Likewise, countries where vaccinations are prevalent will determine their own rules regarding international travel to or from countries with lower vaccination rates.

I do not say this to frighten some of you, but to open your eyes to the possibility that, if you rely on international tourism, it is time to target your marketing towards people in your own country and perhaps countries closer to you. That will be hard for some, so if you must rely on long-haul travellers, then focus your efforts on bookings for late 2022 and early 2023 at the earliest.

What is still unclear is how international travel will provide assurances that travellers have been vaccinated. Talk of immunity passports have been volatile and the concept is not supported by the World Health Organisation (WHO). One thing that is clear, however, is that demand to travel is large and, when the doors open, people will travel. Where they will be allowed to travel to and where they want to travel to will inevitably be affected by vaccination rollouts. As you'll see in the survey data throughout this document, quarantine requirements at either end of a journey will continue to be a massive factor in booking decisions, even if borders are technically open.

Vaccinations should give the tourism industry hope, but they, unfortunately, will not fully resolve the problem. The global tourism industry will continue to be affected by covid for the next two years. What tour operators can do about that impact is adjust tactics and meet the market demand that exists, wherever it may be.

The Current State of the Tour & Activity Sector

Survey of 507 operators

The next few pages provide a holistic view of you, the tour operator on how the last twelve months has affected your business and how you see the future of your business in 2021 and beyond.

tma. tourism marketing agency

Analyzing the Data

As well as surveying the thoughts, fears, and opinions of prospective tourists, we also took the time to survey 507 tour and activity operators from all around the world. Comparing the perspective of operators with the perspective of their future customers helps us highlight useful and pertinent differences between the two groups.

While looking at the data from travellers on a global scale as well as specifically within their regions, we could find gaps in the way tour operators and activity providers are meeting the current market demands. COVID-19 has changed the game for many, but the insights shared by thousands of travellers, when taken in combination with the insights shared by 507 tour businesses, can show us where we can improve marketing efforts and better target the right customers.

The key takeaways highlighted at the beginning of the Worldwide Consumer Mindset & Intent overview incorporate important findings from this tour operator survey. We separate this to specific regions of North America, Europe, UK & Ireland and Oceania.

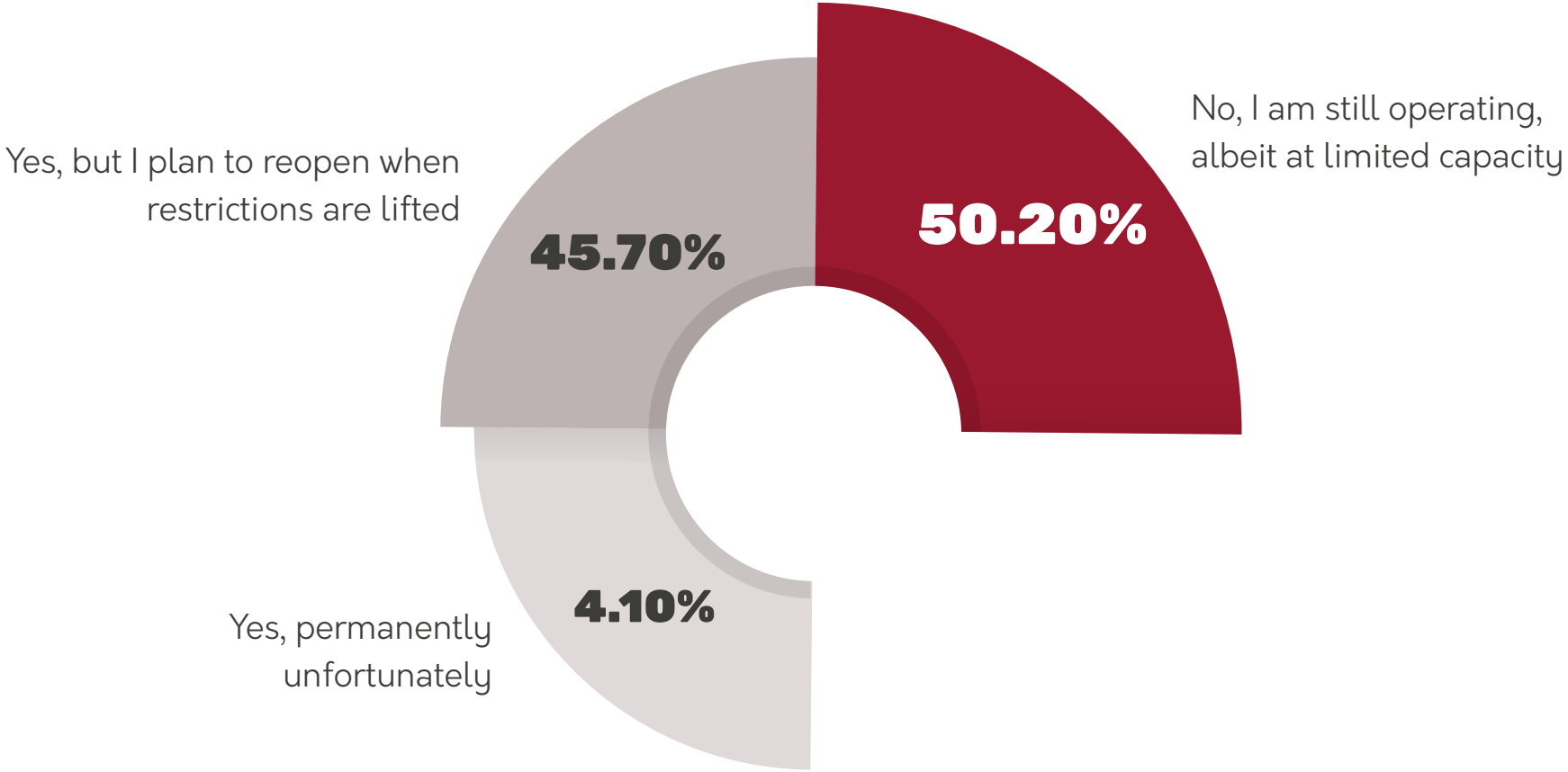
The purpose of this companion report was to ask as many important questions as possible from a wide and demonstrable group of potential travellers (sadly, we're all merely 'potential travellers' at this time). But acquiring original data isn't enough to make it worth operators' time and money, so we've spent considerable time studying the data, making sense of it. Where possible, this report also provides actionable tasks based on our findings, combining research with practical marketing efforts that are easy to implement.

While we surveyed 'potential travellers' from all over the world, we also offer a deeper, location-specific analysis for businesses who would prefer to skip the general information and go straight to their specific country or where their main target demographic resides.

In this section, we will review the results of our survey of 507 tour operators around the world. This section occasionally draws on data from the wider consumer-led report, but there is considerably more statistics and advice to be found on the companion report.

Either report will be valuable and useful taken in isolation, but they work best when considered together.

Have you had to close your business during Covid?



tma. tourism marketing agency

As we know, this pandemic has had a devastating effect on our industry but from those surveyed, only 4.10% have had to close their businesses permanently. Although my heart goes out to any business who has had to close their doors, this low figure is encouraging.

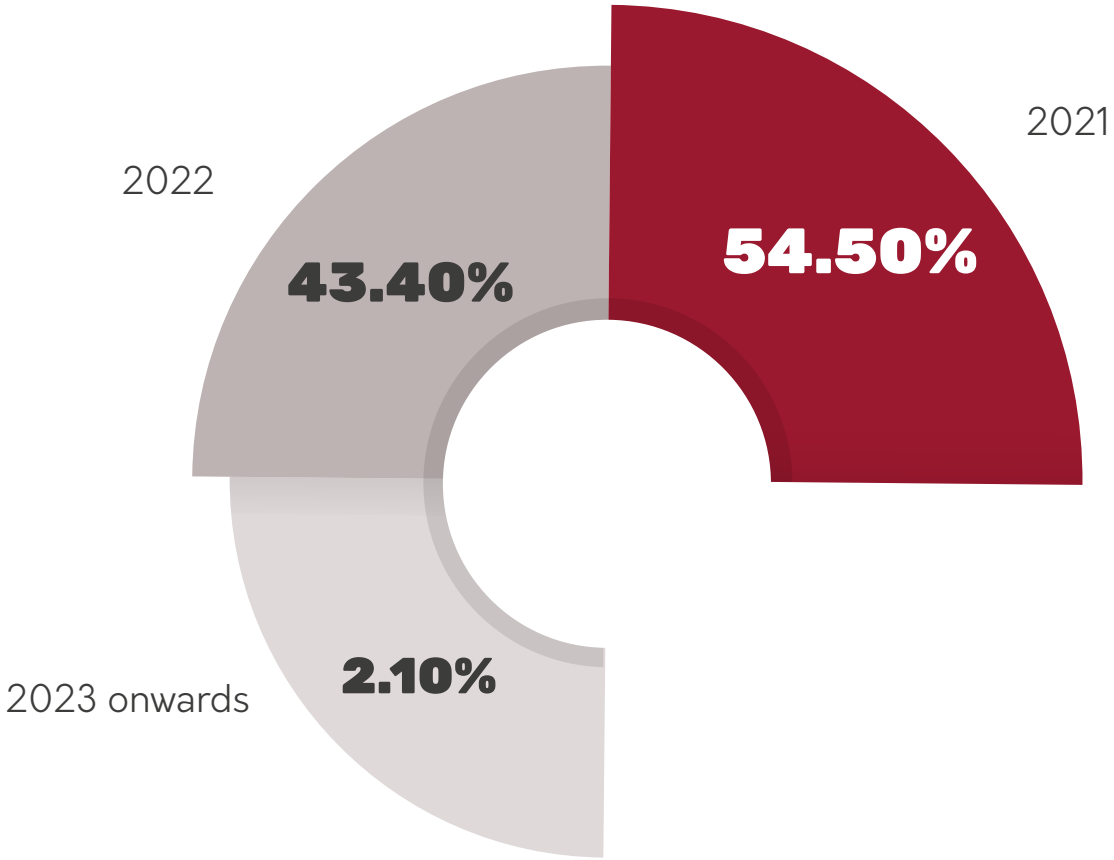
Also encouraging, is that over 50% of these operators have managed to stay open and operate, albeit in a limited capacity. I am sure sacrifices have been made to make this happen but it is great to see so many managing to keep the lights on.

45.70% have closed but expect to reopen when restrictions are lifted. If this is the case, then that is a combined 95.90% of operators who will be 'back in business' when we return to some form of normality. With what is set to be an influx of booking for tours and activities when things improve (see our traveller intent research) then this is good news for our industry.

The one caveat I will add to these encouraging figures is that some of these operators may need to adapt or change their product offering as detailed later. Travellers are looking for specific product types so bear this in mind.

For those who stated that they have closed permanently, they could progress no further in the survey.

Are you planning for bookings to pick up again in 2021 or 2022?



tma. tourism marketing agency

This was an interesting question to ask as it gives a sense of what tour and activity providers expect, or are planning for in the years ahead.

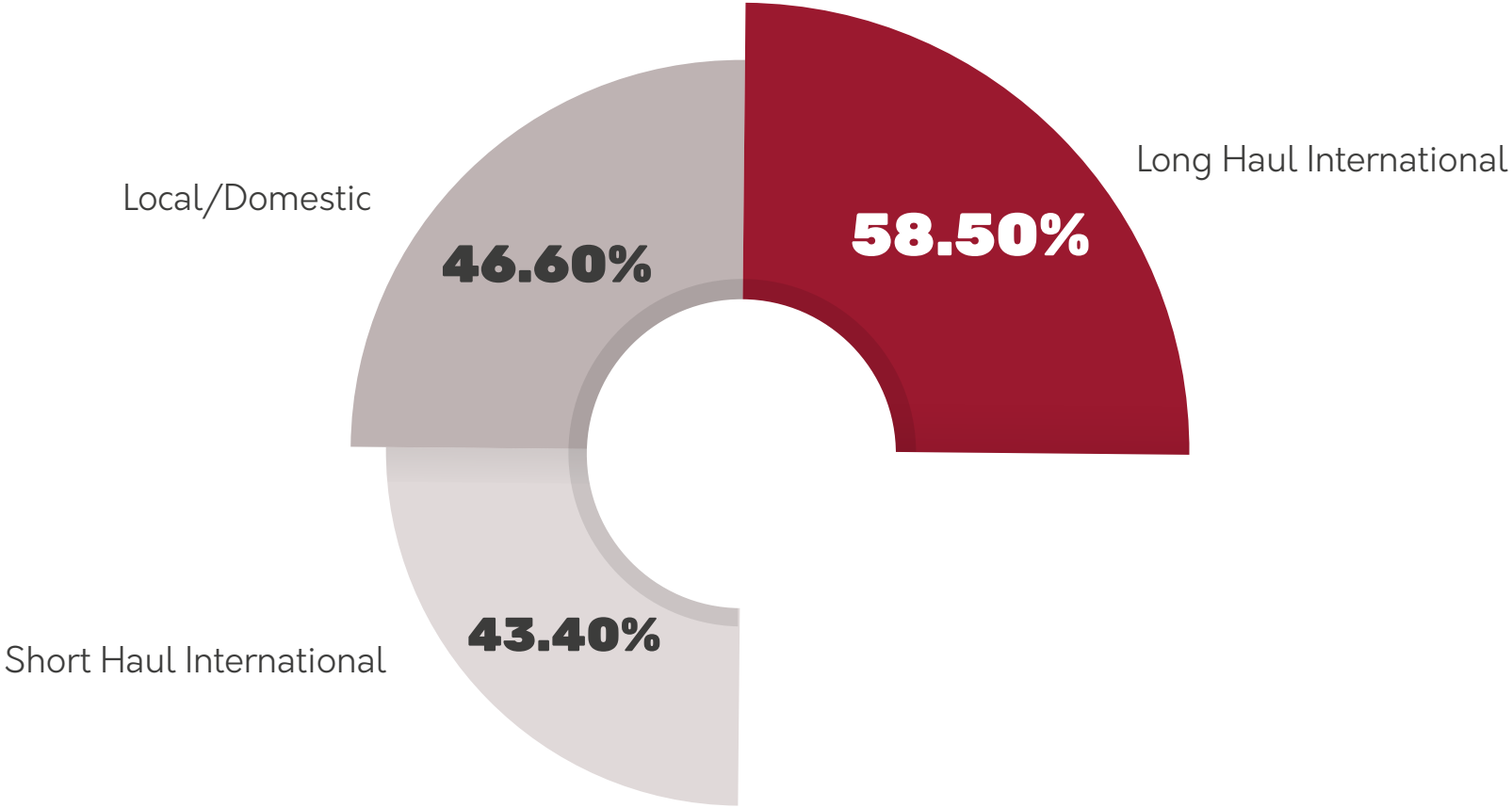
A majority at 54.40% are planning for bookings to pick up again in 2021. Going by the vaccination map outlined at the beginning of the Traveller Intent results, that could well be a strong possibility for some, and I am sure most of us are hoping that this will be the case. But 43.40% of those surveyed are not expecting bookings until at least 2022. It's perhaps not surprising that the majority of operators are planning for bookings in 2021; 2020 was an extremely tough year and many tourism businesses are desperate for some form of revenue in 2021.

I suspect that much of this will be destination-specific. Australia and New Zealand operators, for example, will find it harder to get any international bookings in 2021 due to current quarantine restrictions, so any operators looking at 2021 bookings will be leaning on domestic travellers.

It is still tricky to say with any degree of certainty when tourism will truly be up and running again. Mostly, this is because there are too many variables that are constantly changing, and there are 195 countries, all with different forms of government struggling to weigh up the risks and gains associated with allowing tourists into their country again.

With only 2.1% of operators stating 2023 is when they are planning for bookings to start again, it's encouraging to see that most tour businesses expect to see a recovery within the next two years. If the vaccination map is correct, I would also agree with this train of thought

Who is your typical customer? (tick all that apply)



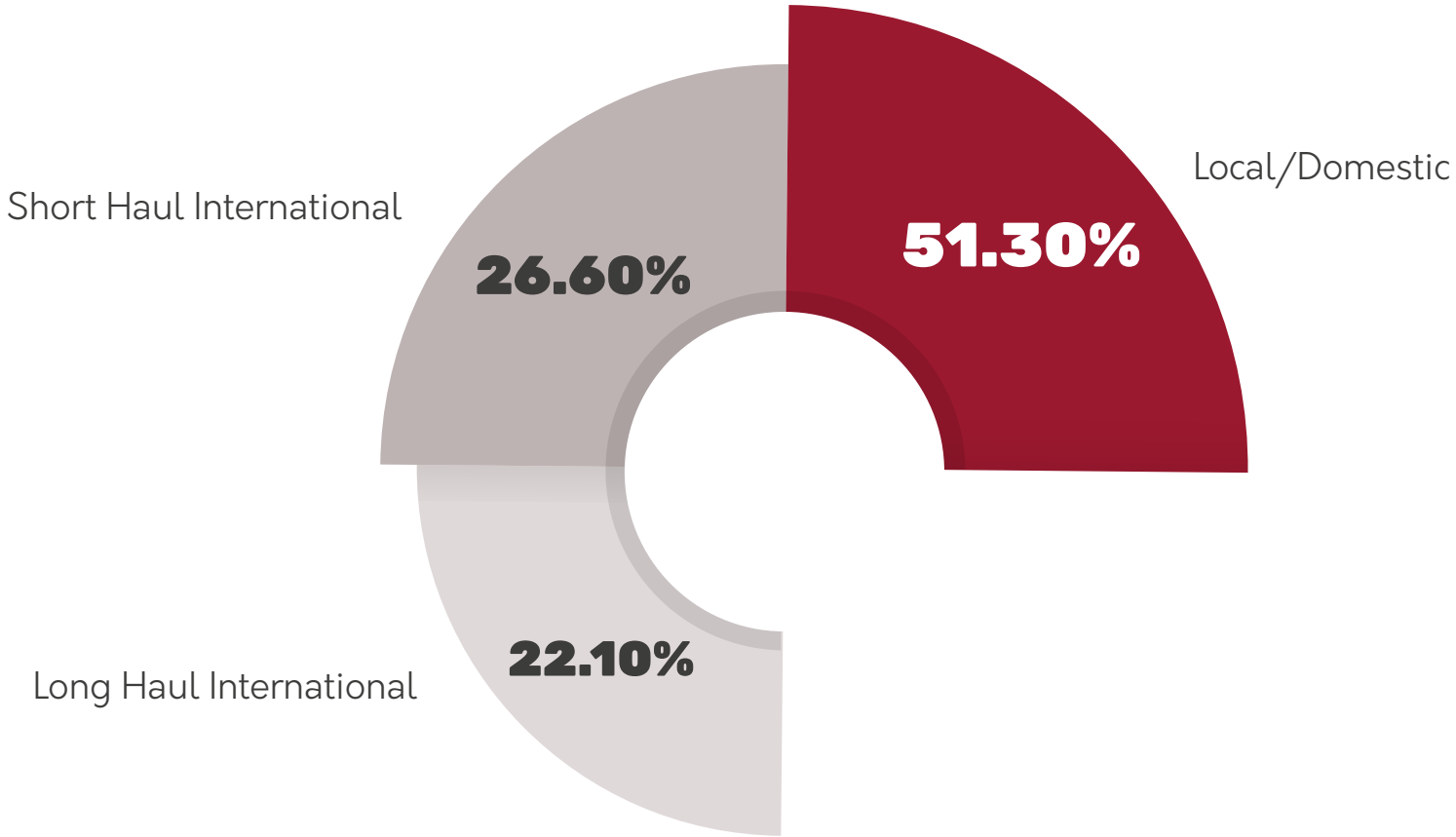
tma. tourism marketing agency

This was a series of two questions I asked to get a sense of what an operator's typical customer looks like and who they think the customer will be in the future.

Unfortunately, 58.50% said that their customers are typically those who travel from far distances, something that will be harder to cater for in 2021. Encouragingly, 46.60% welcome local and domestic travellers, which is where most of the demand will come from in 2021, based on travellers' intentions.

The short-haul travel market, at 43.40%, will still be popular, but more likely from mid-late 2021, and only to specific destinations. But take note that 54.50% of worldwide travellers are looking for local and domestic products (see traveller intent research).

Who do you think will be your typical customer over the next 2 years? Has Covid changed this?



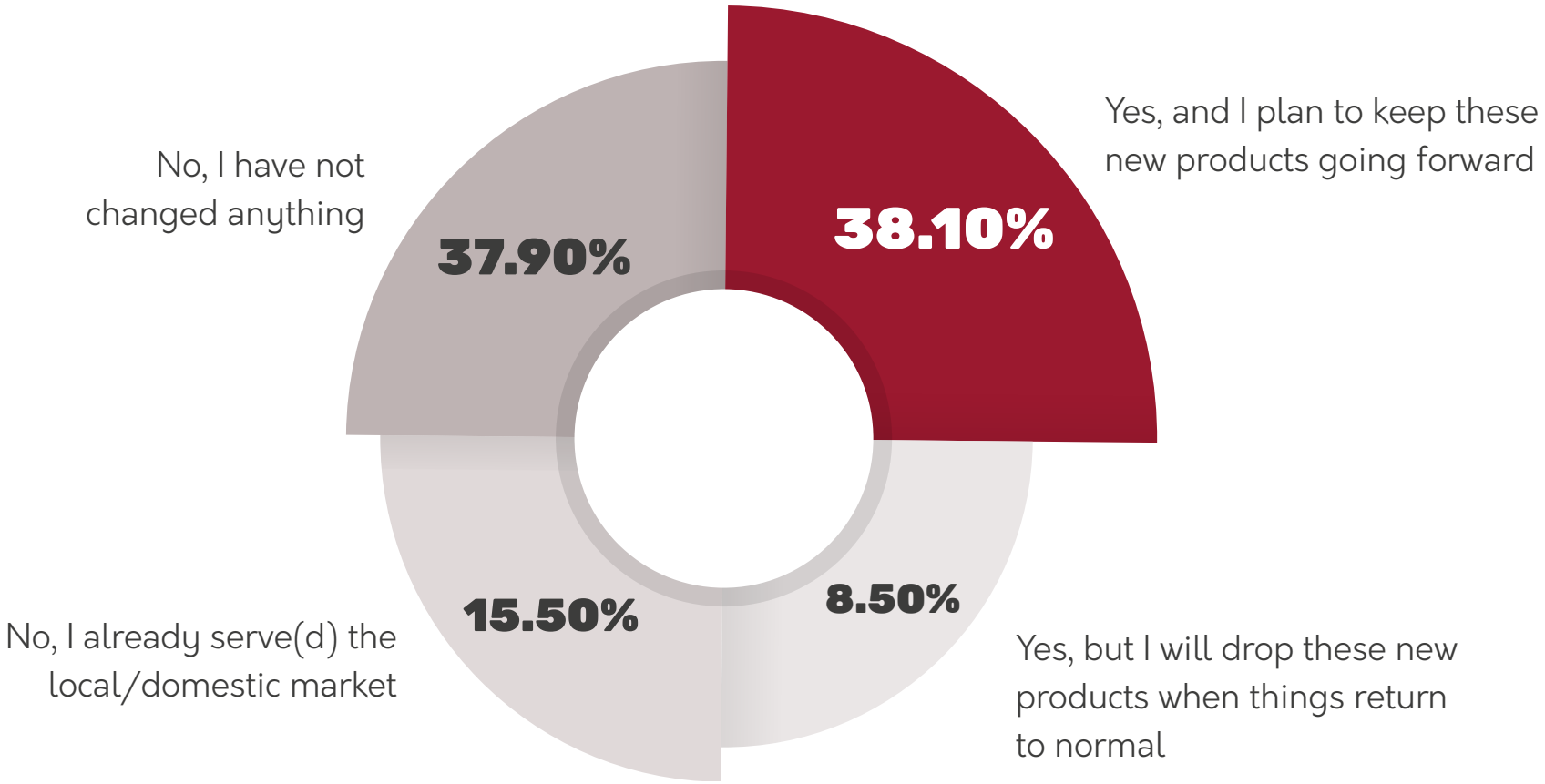
tma. tourism marketing agency

After asking who their typical customers are, we then asked for predictions for the next two years. Of those surveyed, 51.3% said that their typical customers will be local/domestic. This is promising that the majority already see the likelihood of domestic travel being their primary market for the near future.

Seeing the predictions of long-haul travellers being the smallest proportion of customers over the next two years, those operators who tended to cater to that market will want to add to or adjust their product offerings to meet the local demand.

Depending on the location of the operator, short-haul international travel could happen in 2021, but I suspect that those still looking for long haul may have to wait longer.

Have you changed your products or services to cater to a local/domestic market because of Covid?



tma. tourism marketing agency

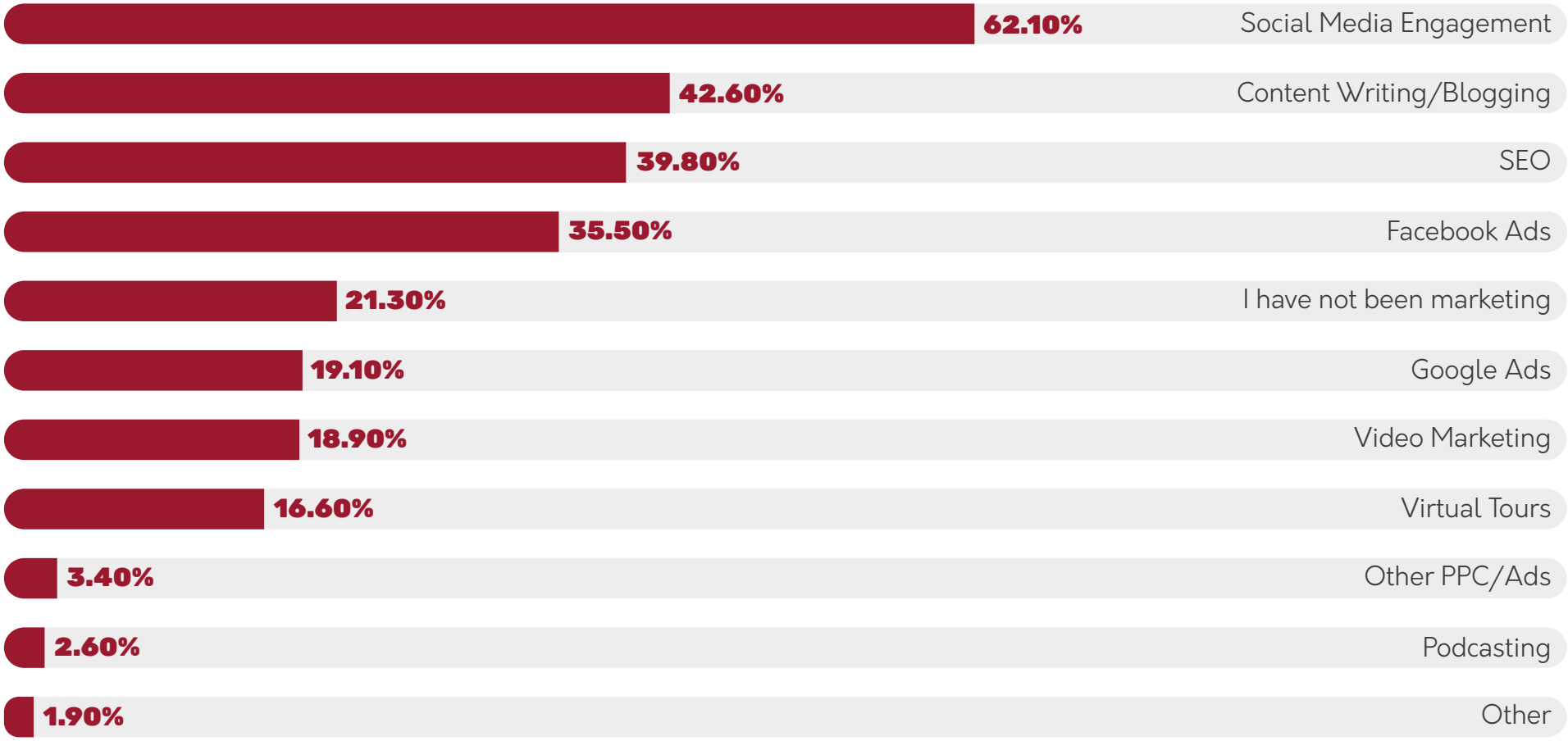
Local and domestic tourism was something I recommended operators focus on at the start of this pandemic and I see this remaining the case for many operators in 2021.

Many operators have changed their products to cater for this market and plan to keep them going forward. Interestingly enough, 37.90% have not changed any aspect of their product offering, which is a little worrying for me. It could mean they are some of the operators who are waiting until things improve, or they feel their product offering is fine for the local markets, but I suspect some have simply not changed because they do not know what to change, or how to change.

In our traveller intent survey of 2,000 potential travellers, you may find some nuggets of information that will inspire those still unsure of how to create tour and activity products that appeal to locals.

We suggest you start with your domestic market region and see the types of tours desired by those travellers, as well as the length and style of tours they prefer for 2021.

Which marketing initiatives have you been trying during the pandemic? (Tick all that apply)



tma. tourism marketing agency

As I have said from the very start of this pandemic, you must not stop marketing as you may as well tell your potential customers your business is dead. With many free ways to market your business, apart from time, there really is no reason not to.

And it is these 'free' marketing tools that most operators have embraced, with many turning to social media, content marketing, and SEO. Interestingly, Facebook Ads is within the top 5 tools being used, so some of you have been willing to spend a little on this platform to gain some form of awareness, or perhaps even future bookings.

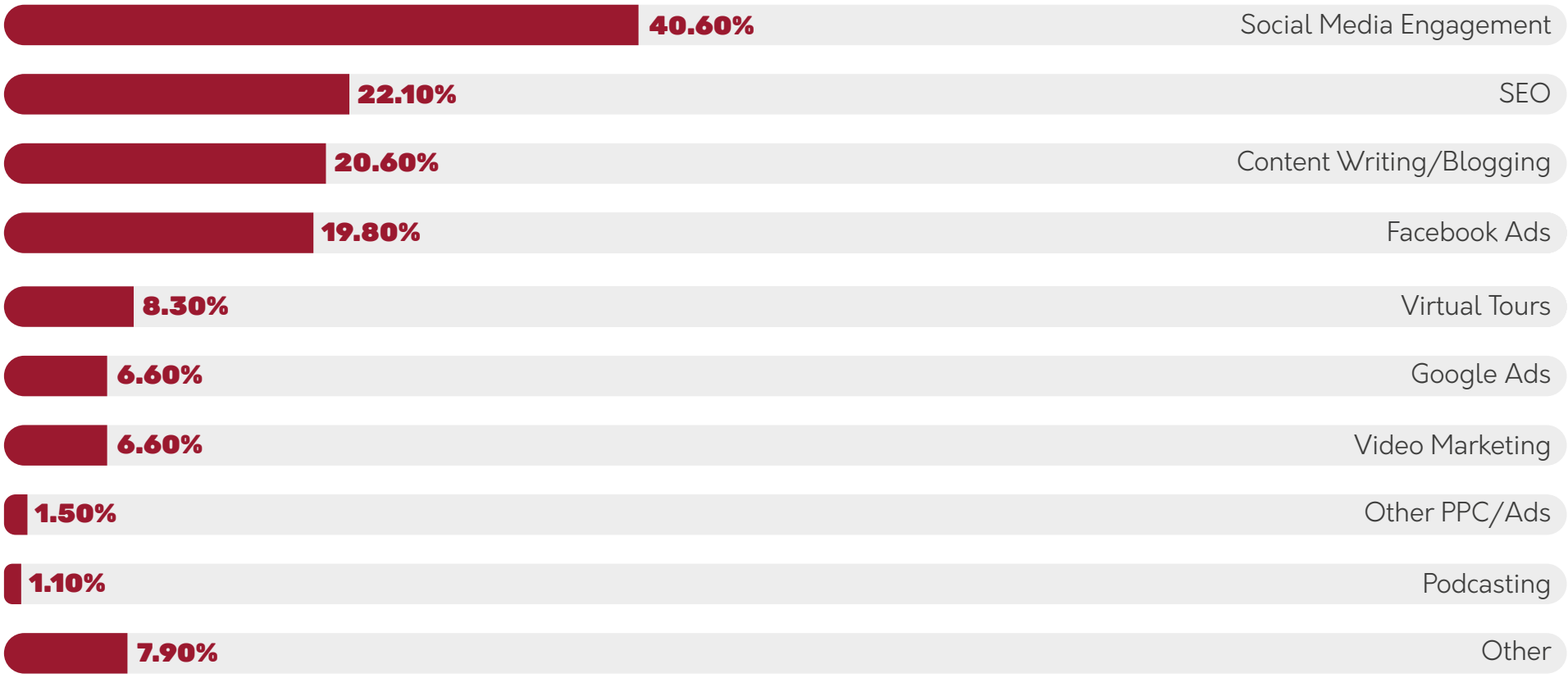
What I find worrying is that a massive 21.30% have not been marketing at all. Remember: those who said they have closed permanently did not get this far in the survey, so these are operators who are looking for bookings in 2021 or 2022.

Although we can not travel, we are still looking for places and activities we wish to go to or participate in when we can finally escape. You need to inspire these travellers during lockdowns and restrictions to persuade them to book with you in the future. This means you can 'hit the ground running' when the doors do open up again. Competitors who have been marketing will have a huge portion of this influx of travellers if you do nothing during this time to raise your online presence.

Virtual tours were also making waves during the pandemic, with 16.60% of operators dabbling in this area. This is a little higher than I expected, but it's encouraging to see businesses getting creative.

Those who selected 'other', also tried virtual conferences, TV and Radio, and email marketing, amongst others.

Which marketing initiatives have worked the best during the pandemic?



tma. tourism marketing agency

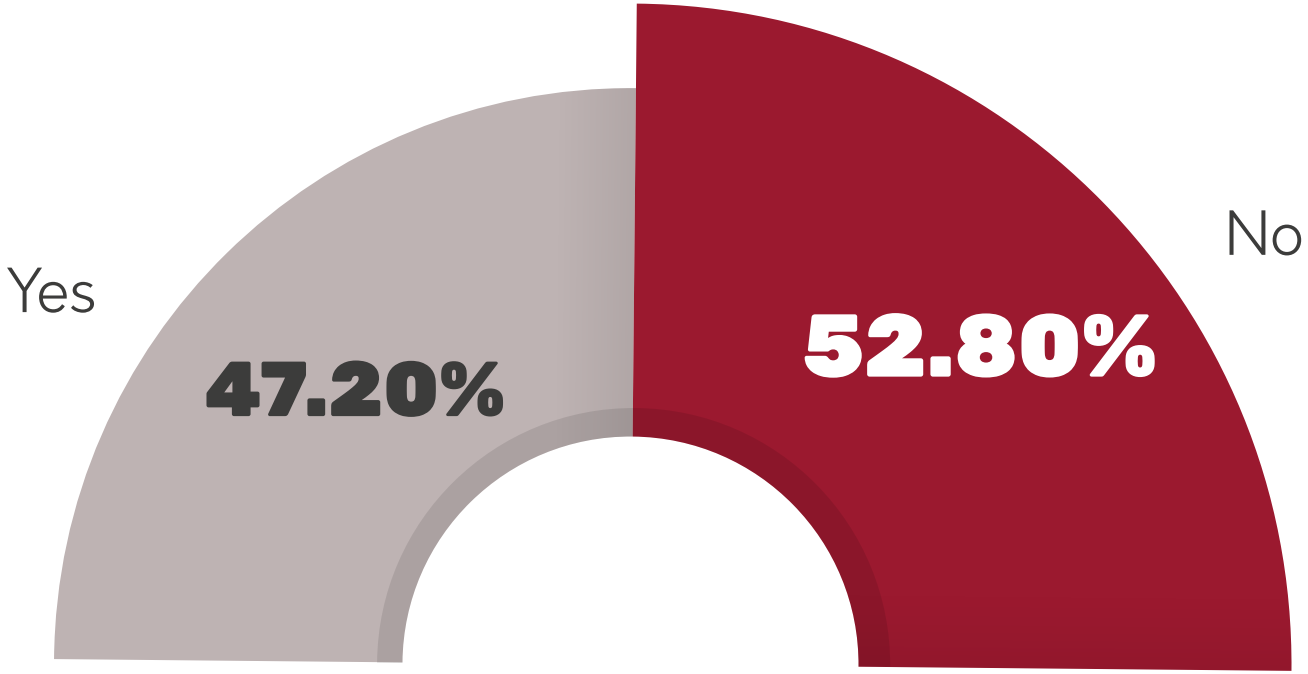
I was interested to hear about the successful marketing strategies operators have chosen during the pandemic, hoping that we could all learn from each other's successes.

Social media, SEO, content marketing, and Facebook advertising were again all at the top of the selected initiatives. I was surprised that video was not further up the successful strategies as this is normally an effective marketing tool. Interestingly, 8.30% thought virtual tours worked well. More on this later, as we asked what these operators deemed a success.

Social media wins hands down, which is not surprising as this is the marketing tool most people are comfortable with. It's often easier to engage with customers on social media, and it's free.

Those who selected 'other' found that emailing past customers, word of mouth, networking, and email campaigns worked well.

Do you feel like you have the necessary digital skills to market your business yourself?

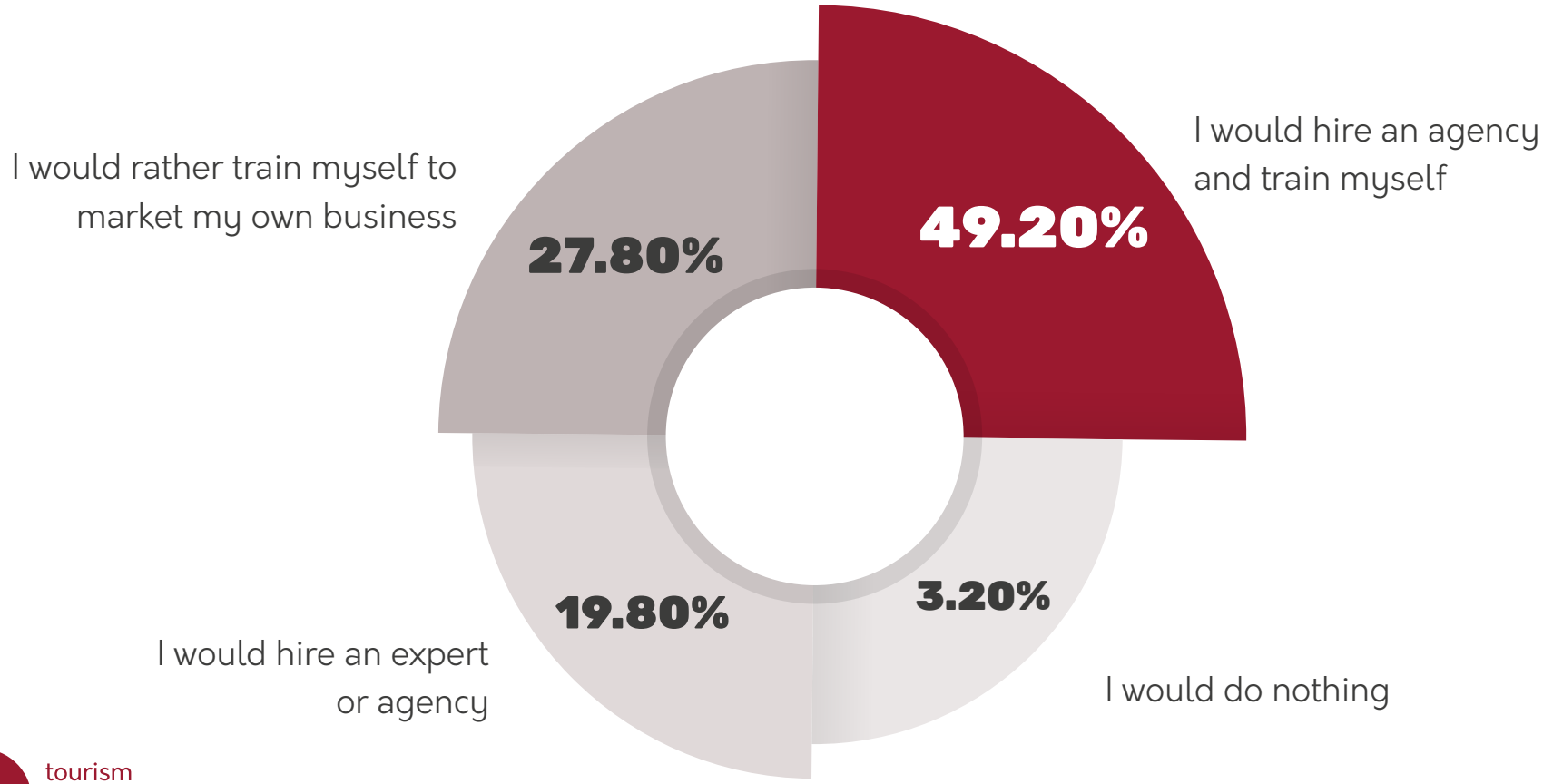


This was an important question to ask as it helps determine the skill level of the operators we surveyed, which in turn allows me to ascertain any knowledge gaps they may have.

In a near split down the middle, 52.80% felt that they do not possess the digital skills to market their business effectively, with 47.20% saying they have the necessary skills. This highlights, to me, that despite the many books, webinars, e-Learning solutions, and workshops out there, they are either not getting in front of these operators, not really providing the knowledge they require, they aren't engaging enough, or that the operator is simply not interested in learning digital marketing.

This digital skills gap is something that must be addressed if we are to give every tour and activity provider the best opportunity to grow their business in an ever-increasing digital world. This is something I am personally taking on in an effort to help all tour operators in the near future; I'm working on a digital marketing resource that will work for people who need marketing expertise but can't afford to hire an agency. If you are interested in knowing more, please register here.

For those who feel they do not have the necessary digital skills, would they hire a marketing expert or seek training to better their skills?



tma. tourism marketing agency

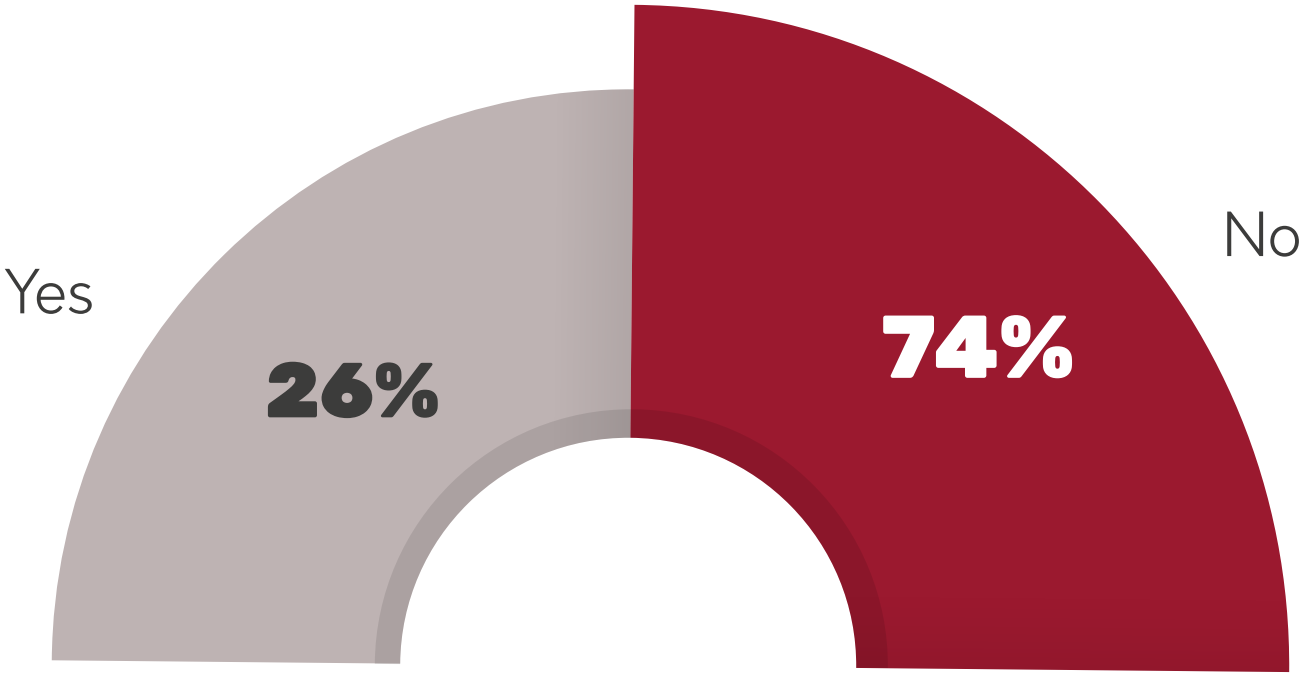
With so many operators stating that they do not possess the necessary skills, how many of them were willing to do something about it or leave it to an expert?

It is very encouraging to see that 49.20% of operators wish to extend their own knowledge of digital marketing while also hiring an agency to assist them. A further 27.80% wish to learn digital skills by other means. This shows us that a combined 77% wish to do some form of training to expand their digital skills. This is great to see as it shows there is an appetite for this within our industry.

A combined 69% also desire the help of an agency, which, as a marketing agency owner is great to see, but I also understand that training is very important. This is why I put so much focus and effort into not just helping tour operators but trying to educate them through the video and podcast series, The Digital Tourism Show, amongst other initiatives.

What I do find odd is that 3.2% of those who said they don't feel they have digital skills also plan to do nothing about it. It is incredible to think that any business owner would not wish to grow their business through training or by taking advantage of another's expertise.

Have you tried virtual tours?



tma. tourism marketing agency

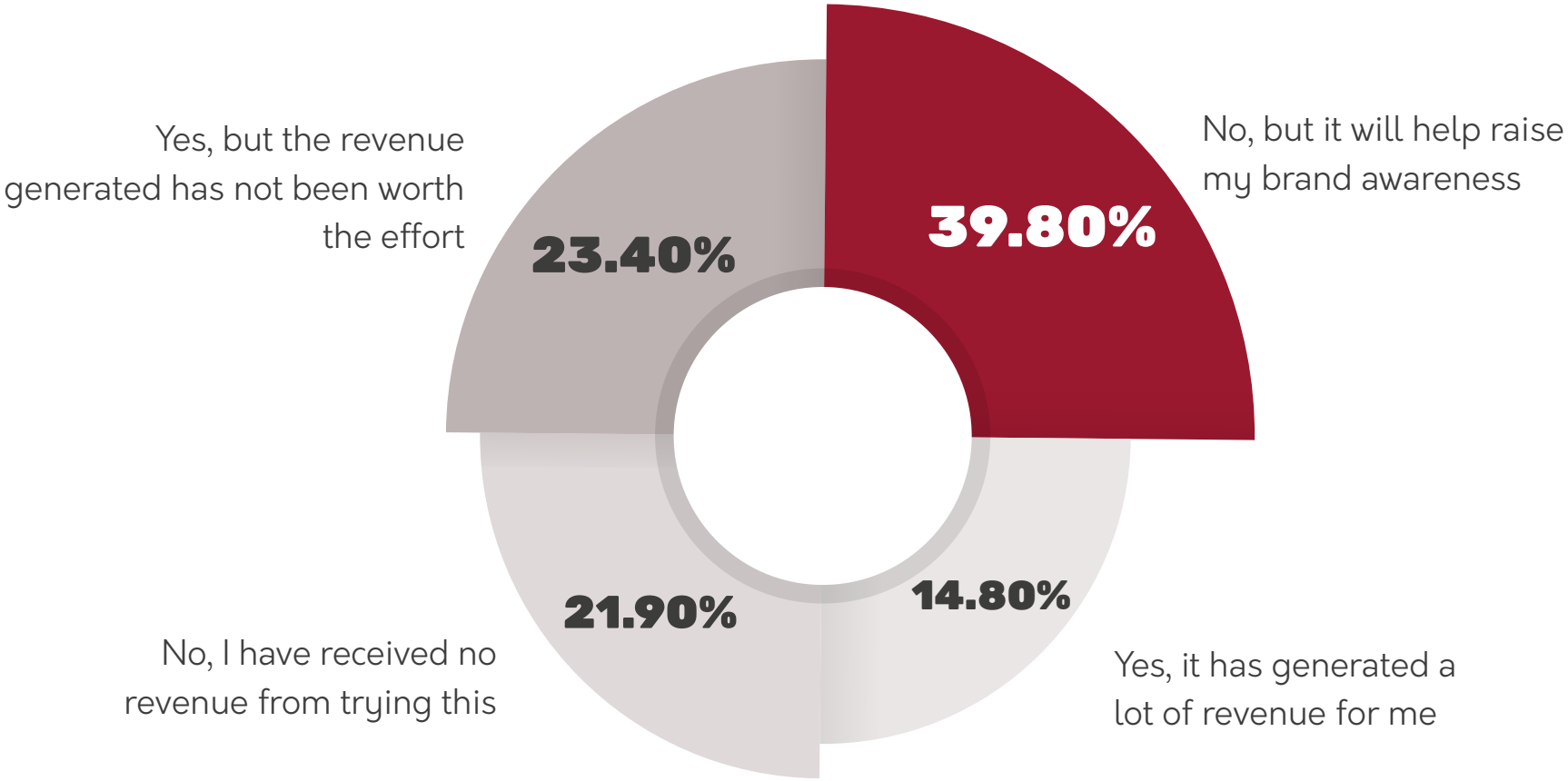
During the early stages of the pandemic, there was a lot of buzz around virtual tours as it was seen as a way to generate some revenue while the world was in lockdown. As such, I felt it was important to ask how many of those surveyed tried this strategy.

From those surveyed, just over a quarter of operators have tried their hand at virtual tours, which is higher than expected given the effort required to produce this type of product and the fact that more than half said they did not have the necessary digital skills to market their business.

Personally, when virtual tours were offered as a way to generate revenue during the pandemic, I felt it was not the right thing to focus on, and I still stand by that statement. While I feel in future there will be a higher demand for this type of product, I think virtual tours were more of a distraction for operators as opposed to a genuine replacement of their previous product offering.

Where it does add value, however, is brand awareness and fostering trust in your brand, so if you are creating virtual tours with this in mind, then this is what you should focus on.

If you have tried virtual tours, did they generate revenue for your business?



tma. tourism marketing agency

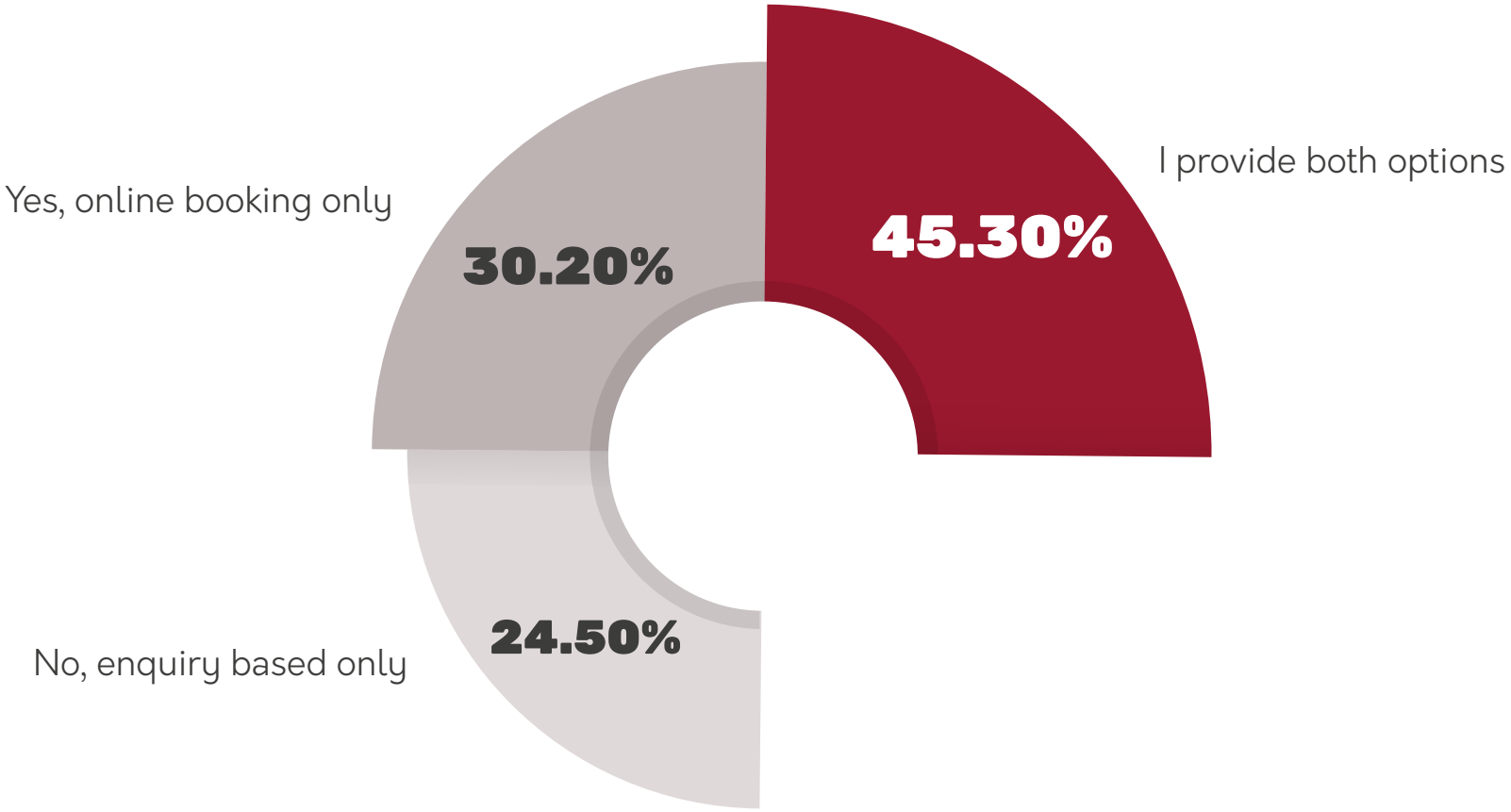
From all of the operators who tried virtual tours, 14.8% of them said yes, it did generate a lot of revenue for them, which is great for those operators.

Another 39.3% said that virtual tours did not generate revenue, but did help raise awareness of their brand. As a brand awareness tool, virtual tours are great, but it is clear that — for the vast majority of operators who tried it — it was not a tool to generate enough revenue for their business. So if you are thinking about trying this, make sure you weigh up the ratio of effort-to-result.

Where I would say virtual tours can work well is when they act as part of a physical product. I recently participated in a virtual cocktail tasting, thanks to Zakia Moulaoui of Invisible Cities. The company sent out the ingredients for us to sample while watching the virtual experience. This is when virtual tours can work well as an additional experience.

If you are thinking of shipping items, a domestic market is still the easiest opportunity to avoid long delays and high international shipping rates. But creating unique, memorable combination tours like the virtual cocktail tasting is a great opportunity to encourage repeat business.

Do you offer online bookings?



The advice most experts give is that you should be bookable online. But how many operators actually are?

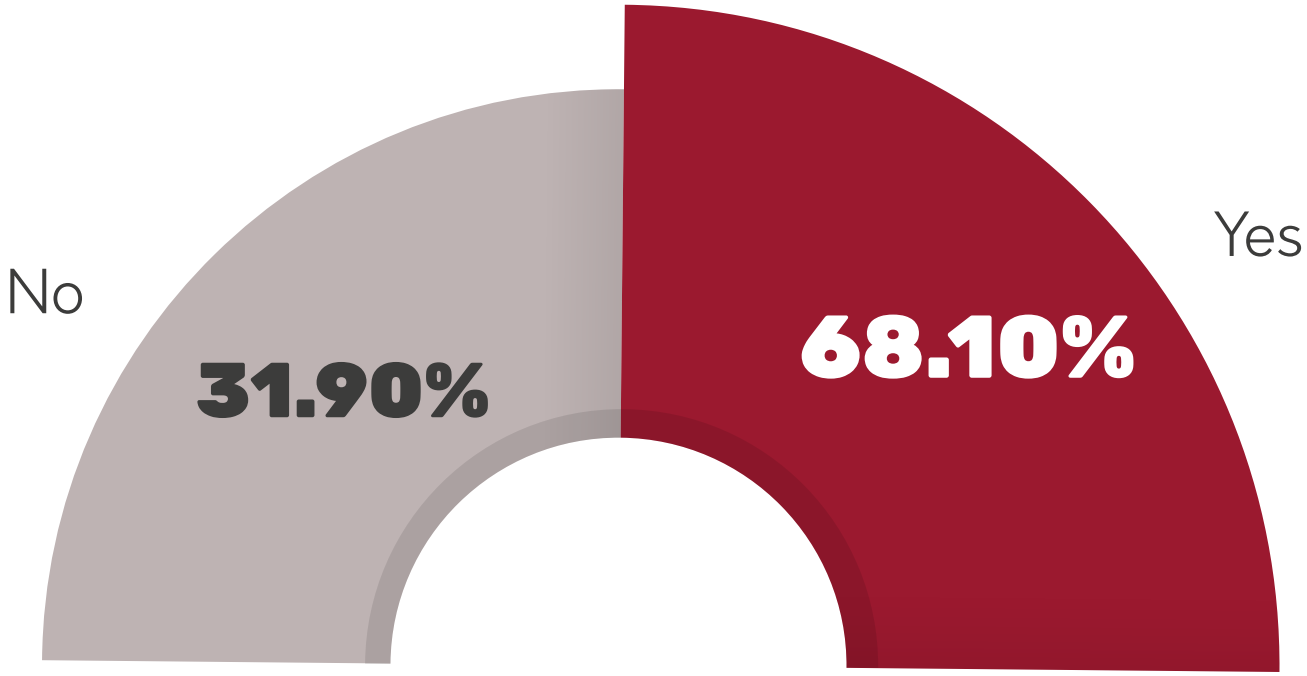
A combined 75.5% of operators say they provide online booking, which is fantastic. The other 24.5% of operators only provide an enquiry-based option, which is not a bad thing. Online booking is harder for some tour operators, especially those who provide fully bespoke itineraries.

A lot of operators get hung up on this, but if online booking does not work for your business and you are still generating bookings and revenue, then don't worry about it.

Some operators, however, don't offer online booking because of fees or perhaps because they simply get overwhelmed by the technical aspects. There are plenty of resources out there to help operators set up online booking functionality on their websites, and there are alternative options if you cannot afford the fees. Most booking platforms, however, work via a commission model, so you only pay when you receive a booking.

I am very much in the camp of if it ain't broke, don't fix it — so do what works best for your business.

Has your business received any online bookings or booking enquiries during Covid?



tma. tourism marketing agency

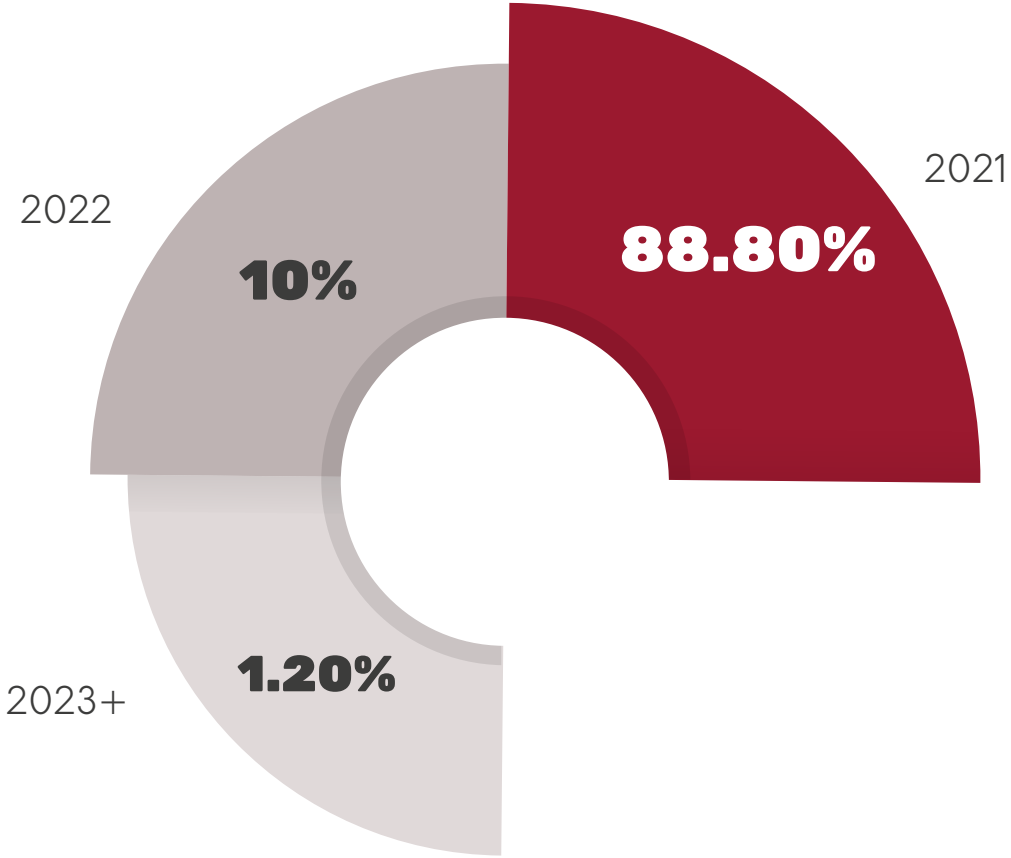
How many operators have managed to generate bookings and enquiries during the pandemic?

It is very encouraging to see that 68.1% of operators have received either bookings or booking enquiries. In a way, this confirms my advice last year that continuing some form of marketing during the pandemic goes a long way to inspire future travellers to book and enquire.

Don't get me wrong, 31.9% of operators who have received no bookings is still a large number, but marketing your business gives you more opportunities to at least reach some customers. I also suspect some people who said no to this question have gone into hibernation during the pandemic.

As we saw in the Traveller Intent survey results: demand is there. People want to travel, it's just a matter of when, where, and how. This is why it is vital to make sure you tap into this demand however you can. Studying the results from our travellers' survey should give you plenty of data and marketing advice for doing exactly this.

For those who received bookings or enquiries, are they for 2021, 2022, or beyond?

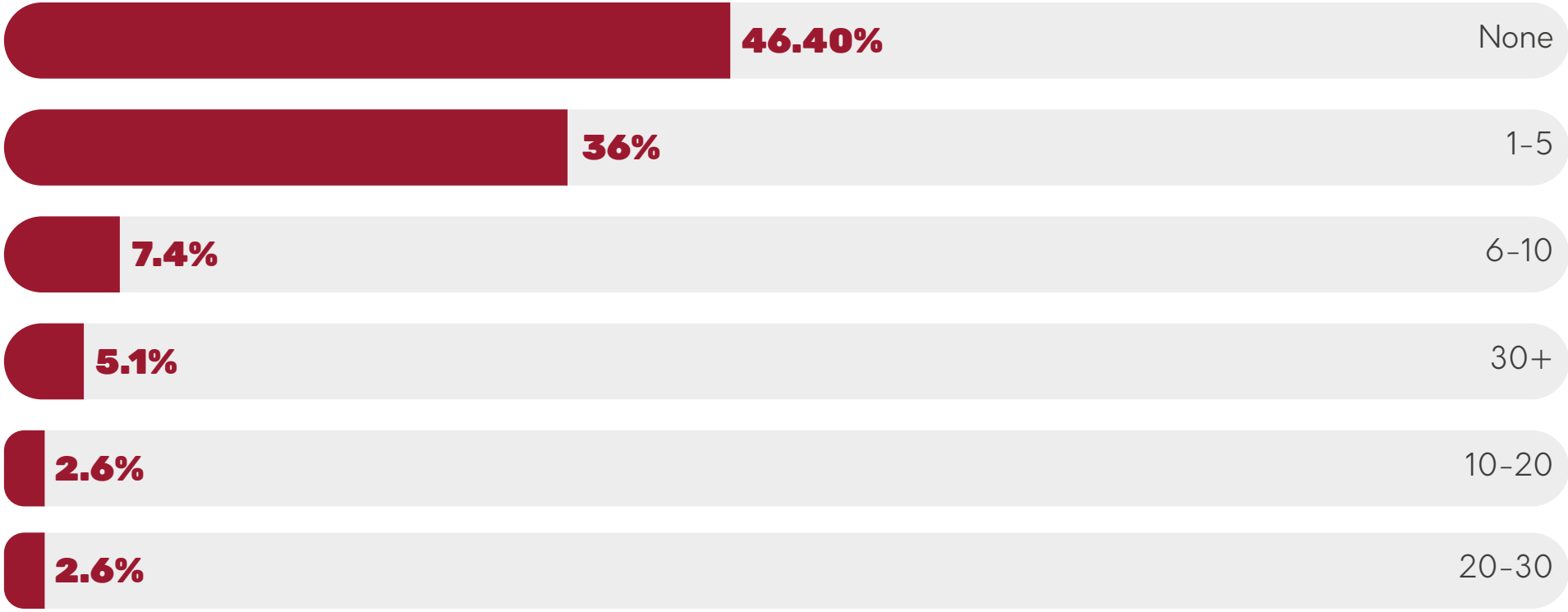


tma. tourism marketing agency

Of those who have received bookings or enquiries, a massive 88.8% of them were made for 2021, which highlights a few things worth considering. Consumers expect that the pandemic situation will improve this year, so they are optimistic that they will travel again. This gives much-needed revenue for many tour operators who have been hit hard over the past year.

If you have not been marketing over the last year, and 21.3% of you said as much, then you must start now to build momentum to stand a chance of tapping into the demand for 2021. Even if the worst was to happen and 2021 shuts down completely again, it gives you a better chance to postpone these bookings to 2022, keeping the revenue generated. This alone may provide a lifeline for some operators.

How many members of your staff and contractors have lost their jobs with your business due to the pandemic?



tma. tourism marketing agency

This pandemic has affected all businesses, with many having to downsize, hibernate, or close completely. It was important to ask how many individuals have lost their jobs over the last year as this may shed some light on what the sector will be like on the other end of this pandemic.

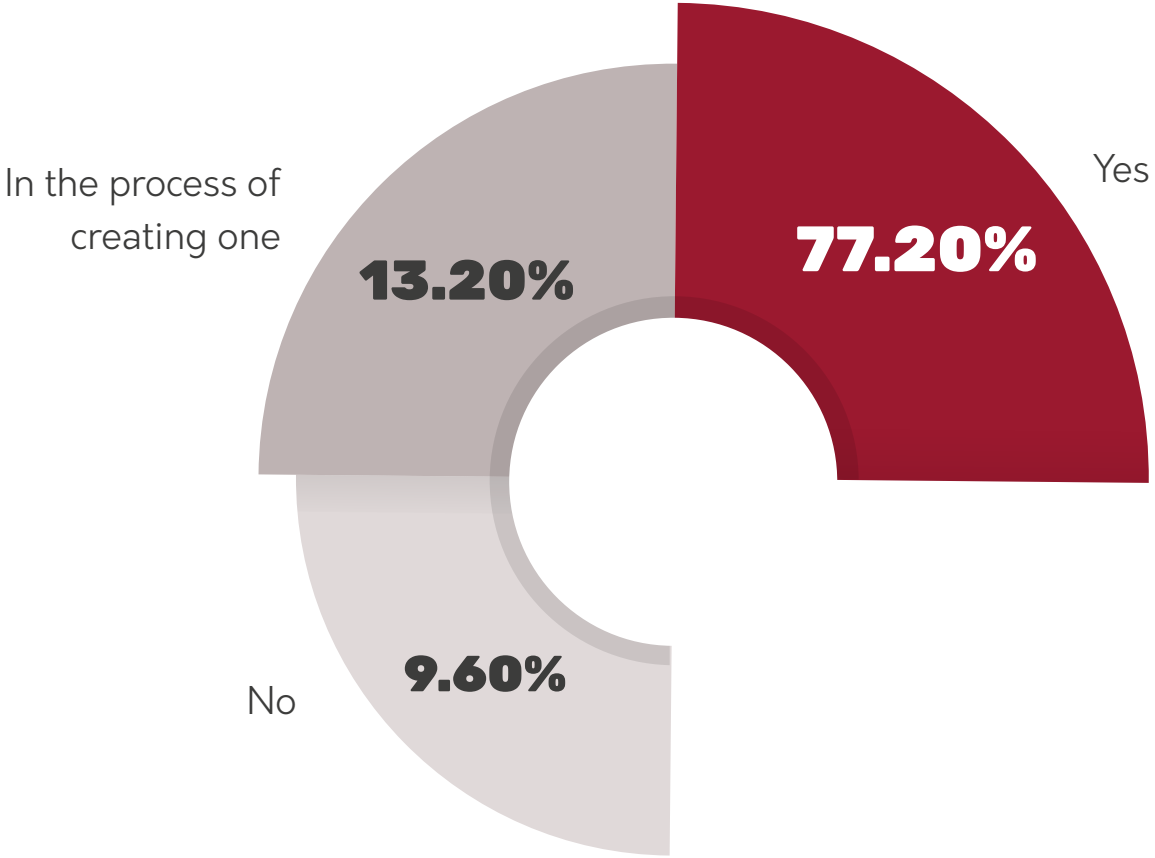
The most important point to remember is that these results are only from businesses that have not permanently closed. This data is from businesses that have the intention of staying open or reopening when they are allowed to do so. The jobs lost from permanently-closed businesses are not even accounted for here.

With that said, I am ecstatic to see that 46.40% have managed to keep their teams and not let staff or contractors go. Some of these will of course be small businesses with just one employee, but it is still a higher figure that I expected.

Another 36%, however, did have to reduce up to five staff members; another 7.4% let go between 6-10 people, and 5.1% of tour businesses had to release 30 or more individuals. As a business owner who employs a team, it is one of the worst feelings you can go through, so my heart goes out to these business owners making such difficult decisions and to the people losing jobs.

For those who are still standing, there is hope. There is a light at the end of the tunnel and hopefully, in time, we can all grow again and re-employ those we had to let go.

Do you have a Covid flexible booking/ cancellation policy?



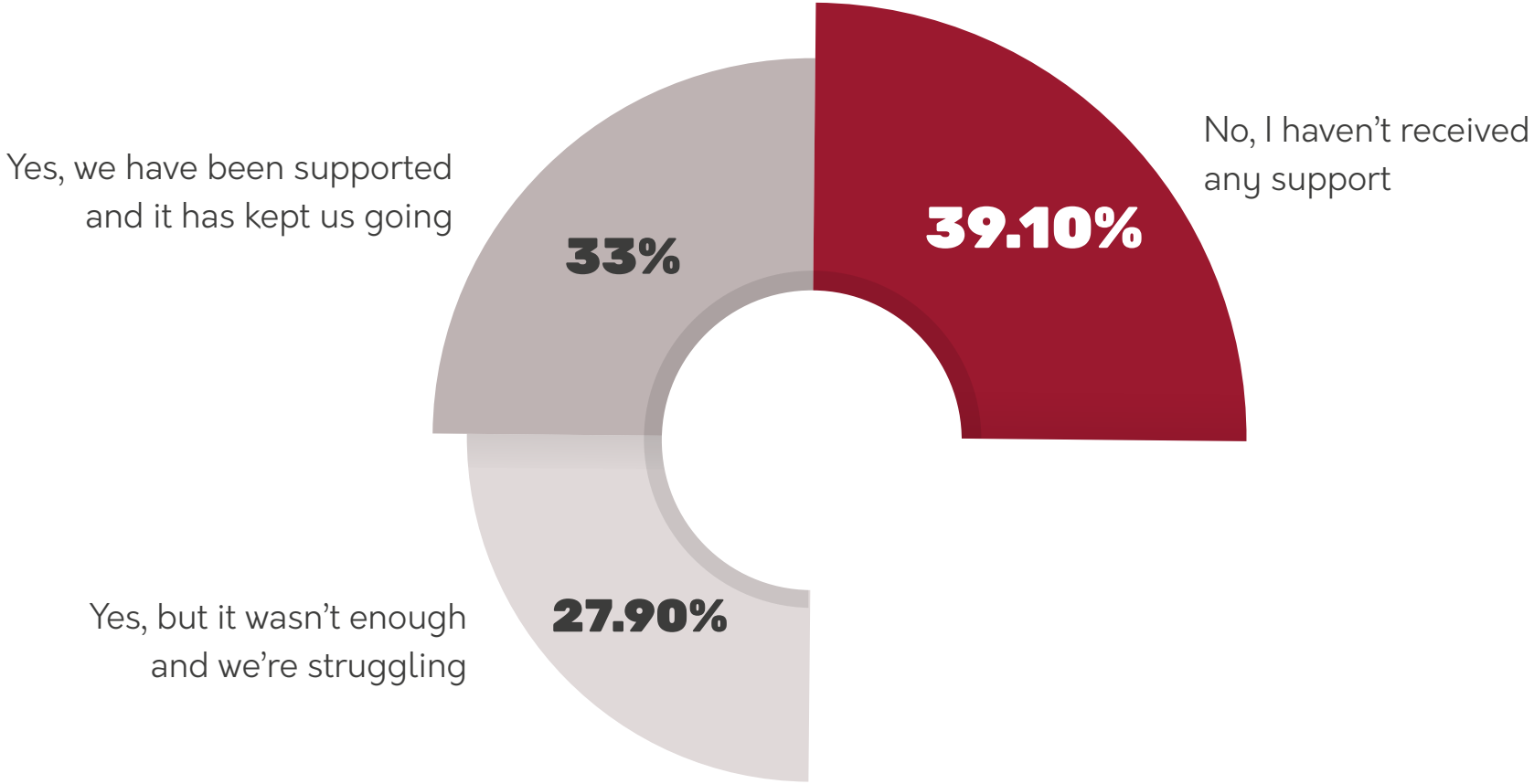
tma. tourism marketing agency

Going by the responses in our traveller intent research, a Covid Cancellation Policy or some form of flexible terms is an absolute must for tour and activity providers.

It is great to see so many operators, 77.20% of them, have a policy in place with a further 13.20% in the process of creating one. This is essential if you are to give consumers enough confidence to book with your business without the fear of losing deposits and being able to move a date if they need to. Yes, it adds more admin time for you, but it is what consumers are now demanding, which was obvious given the results of our traveller surveys.

For the 9.6% who said no to creating a flexible booking/cancellation policy, you may find your business being left behind as nervous travellers in 2021-22 and beyond will always choose a business offering sympathetic, flexible policies over one that does not. They will select the one that provides the most guarantees every single time.

Have you received financial support from your government during the Covid crisis?



tma. tourism marketing agency

Many governments across the world have offered financial support to help businesses through the pandemic, but many also have not. How will this affect our sector?

It is unbelievable to think that 39.1% — the majority of those asked — did not receive any financial support from their governments. This is frightening and I feel for these operators. I can only hope those in this situation can and will survive. Another 27.9% did receive financial assistance, but they said it was not enough and they are still struggling.

The 33% who did receive financial support from their government are apparently the lucky minority.

If you combine those who did not receive funding with those who did but who say it's not enough, we are looking at a whopping 67% of operators who may not make it through this crisis.

This will have a devastating effect on our industry. Competition can, of course, be challenging for tour operators and activity providers. But, at the end of the day, our industry thrives when travellers have options and independent operators can share their passions with visitors. We should all be supporting each other through this crisis so there is still a place for independent operators after the dust settles.

Worldwide Consumer Mindset & Intent

Focus groups and surveys of 2,000 travellers on how they will travel in 2021 and beyond.

Want to know what type of products appeal to your potential customers? Want to know if they will even travel? The following pages answer these questions and much more.

Destinations: North America, UK & Ireland, Europe & Oceania.
Age Groups: 18-54+
Gender: Male & Female

tma. tourism marketing agency

Analyzing the Data

Before we show the full survey with questions and responses, we'll break down the key findings in the data by isolating demographic groups, drawing connections and conclusions, and making comparisons across all data fields. You can review each region-specific dataset as well as the full global dataset below, but this is the key information we've gleaned from 2,500 responses across travellers and tour operators around the world.

Even Optimistic Travellers Are Fearful

People are eager to get back out there travelling again as soon as possible. In fact, **79% of respondents around the world plan to travel as soon as travel restrictions are lifted.** When we asked that question, we incorporated the vaccination factor, allowing respondents to choose to wait to travel until vaccinations are prevalent, even if restrictions are lifted. The fact that 79% are ready and eager to go — regardless of vaccination rollouts — tells us they're chomping at the bit. When the floodgates open, we'd all better be ready!

On top of the optimism our travellers displayed, **68% of tour operators we surveyed have received bookings and enquiries during covid. Of those, 89% have received bookings or enquiries for 2021.** Travel demand is evident.

However, travellers are still scared of the various risks associated with travelling in this era of covid. There is a cognitive dissonance between optimism and fear as people make plans to travel while acknowledging these very real concerns.

Globally, prospective travellers' biggest fear is the complication of quarantine at both ends of the journey; their next biggest fear is the virus itself. The fact that **63% of prospective travellers are afraid of catching COVID-19** reminds us that this is not just an economic issue; this is a matter of health and personal safety. While the travel industry is trying to survive, we must maintain humanity and empathy

above all else. Compassion and flexibility are clearly still needed and will likely be expected as standard for quite some time.

Domestic Travel is Today's Reality

While we can tell that folks are eager to get back out there, exactly where "there" is can vary greatly based on the demographic group. There is a distinctive overall trend, however. And it's one that tour operators everywhere must pay attention to immediately.

> Domestic travel will be the reality for 2021.

67% of prospective travellers are afraid of quarantine at both ends of the journey. That fear is clearly enough to consider domestic travel over international travel, with **55% of travellers finding domestic travel to be more appealing than short- or long-haul international travel.**

But here's the critical issue: **38% of tour operators have made no effort to adjust their offerings and target a domestic market** with products that appeal to that audience. **Only 16% of tour operators told us they already served a domestic market** anyway**.**

With the clear trend toward staycations and domestic travel for 2021 — and perhaps beyond — tour operators will be forced to shift their efforts if they want to see any business coming through.

Self-Guided Tours Could Offer Salvation

In 2021, **only 11% of prospective travellers are interested in group guided tours**, while **33% of travellers would consider a private tour** with their own social bubble. A whopping **56% prefer the idea of a self-guided tour with all of the activities booked for them.**

The takeaway here is that tour and activity providers should consider how they can create self-guided tours and experiences from their current range of products, skills, and knowledge.

> The self-guided tour market is simply too large to ignore.

By employing tech tools and services, tour operators can create package or custom self-guided itineraries and products. From Google Maps to fully-customised branded apps, you can spend nothing but time or you can invest quite a bit in creating self-guided options. Whatever you put into it, this large market share could be a huge opportunity.

Get creative and offer unique self-guided tours aimed at a domestic market that's eager to experience new places and activities in their own backyards.

Are Overnight Stays Safe and Desirable?

When restrictions started to ease in 2020, accommodation providers twisted themselves in knots to ensure travellers felt confident and safe staying away from home overnight. Those efforts were not in vain!

Today, **66% of travellers want their first getaway post-covid to be at least a weekend and up to a full week** away. **Day trips would only satisfy 8% of travellers**, which tells us that overnight opportunities are more appealing than they were in the throes of 2020.

Younger Travellers are Eager; Older Travellers are Pulling Back

Perhaps not surprisingly, the younger demographic (18-34) was more afraid of quarantine at both ends of the journey, followed by losing their deposit and then not being able to change travel dates. Fear of actually catching COVID-19 was not as high as it was for the older demographic.

Again, when looking at the younger age demographic (18-34), 33% of respondents said they will only travel domestically as soon as it's allowed while a dramatic **48% plan to travel internationally as soon as it's allowed.** This is a much higher percentage than the general results, which showed a more even split between domestic and international travel when taking into account the vaccination rollout.

Excluding the considerations of vaccines, the younger demographic (18-34) also countered the general global results, with **52% of travelers wanting to travel internationally over domestically.** In the general population, 55% of travellers will stay in their own country.

Also within the younger demographic, **78% say they will travel internationally more often or about the same** as they did before the pandemic. For reference, 34% of travellers aged 54 and over plan to travel internationally less often than they did before the pandemic.

That drop in interest for international travel could cover a range of reasons that we do not have direct data on, including health, financial, or safety concerns that can all crop up in later years. However, the over sixties market is often a target for traditional destinations like Ireland, the UK, and Italy. With 34% of respondents indicating that they will travel internationally less often, that's not a small percentage to write off.

Cruises Aren't Dead

Despite the plethora of negative headlines and the devastating effects of covid on the cruise industry, 18% of travellers are most looking forward to taking a cruise when travel opportunities are available again. For comparison, only 9% of travellers are interested in a bus or coach tour.

Relationships Will Drive Travel Decisions

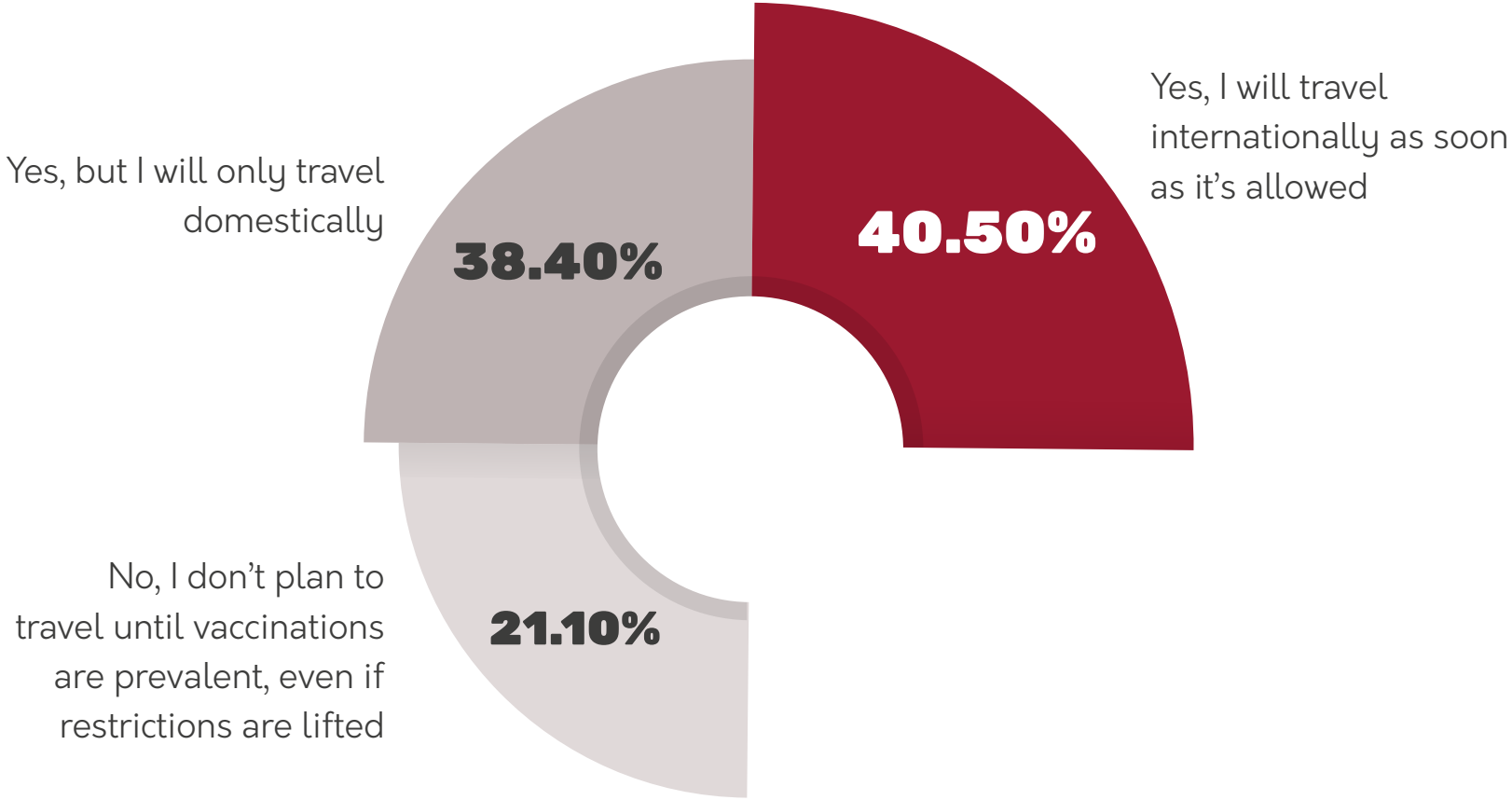
In open-ended responses, an obvious trend for upcoming travel decisions is for visiting friends and family. After extended, difficult separations, there is a clear pattern of travellers making decisions based around reconnecting with loved ones. For many, this will be primarily domestic travel in the near future. But multigenerational travel could also see a boom in our post-covid world, whether domestically or internationally.

Traditional Travel Destinations Still Top the List

Italy was one of the hardest-hit countries when the pandemic first started. However, there are clearly no lingering fears or hesitations about visiting Italy as it still tops the list for desirable destinations. Other traditional favourites like Japan, Canada, USA, Australia, New Zealand, France, Spain, the UK, and Greece round out the top 10.

Question One

Do you plan to take a trip/holiday as soon as any travel restrictions are lifted?



tma. tourism marketing agency

The good news is that a combined 78.9% wish to travel as soon as they can. How they travel, however, is what you must consider. A whopping 21.1% say they will not even travel until vaccinations are more prevalent, so going by the vaccination map previously in this document, that is a lot of people deciding not to travel until 2022/23.

Going by these figures, it is almost a split between consumers wishing to travel internationally and domestically. You'll see that 40.5% of those surveyed can't wait to travel internationally again but nearly the same amount of people (38.4%) will only travel domestically.

So what does this mean for your marketing strategies?

Well, your market will shrink even when the doors to travel open up again, with nearly half of those who do travel selecting domestic travel. So, again, a local/domestic offering and strategy is essential. If you still decide not to go down this route, or you can't tap into domestic travel for some reason, then make sure you take into account that your international travellers will be greatly reduced as this will affect how you run your business.

If you can, consider having two strategies: one to focus on domestic travellers for the first wave, and another to target international travellers for later in the year or 2022 and beyond.

Question Two

In regards to booking a trip, how fearful are you about each of the following?

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Catching Covid-19	12.70%	24.25%	38.55%	24.50%
Losing my deposit	17.70%	20.70%	40.15%	21.45%
Not having the ability to change my journey date	17.30%	22.75%	40.45%	19.50%

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Quarantine at both ends of the journey	14.60%	18.10%	34.35%	32.95%
Fear that the company may go out of business	22.50%	21.80%	36.35%	19.35%

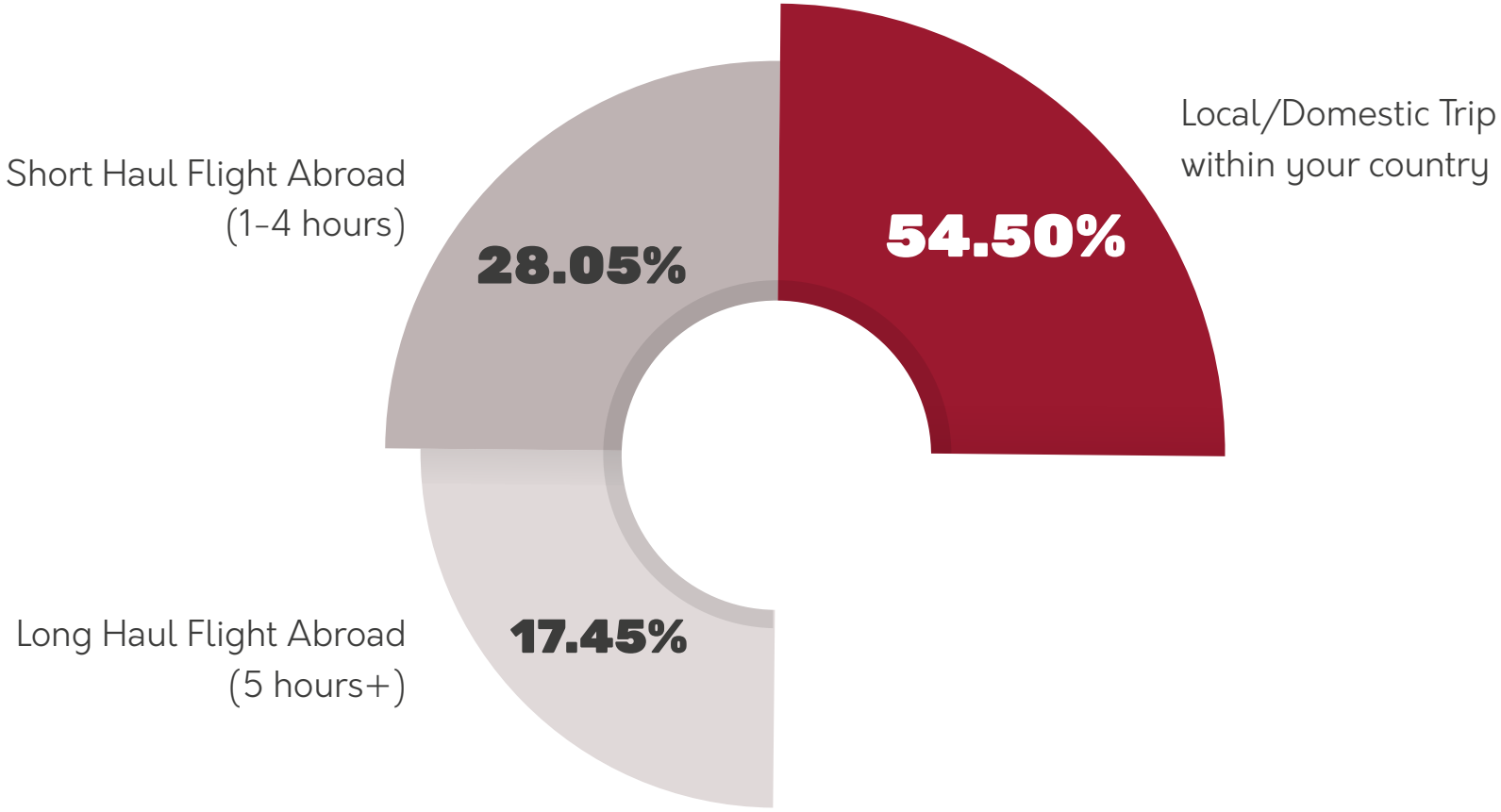
At the start of this pandemic, qualitative data showed us that travellers' main fear was losing their deposits and money booked on trips. This, and not having the ability to change dates without repercussion, was high on their minds. This has now changed a little.

While those are still very important factors for travellers, catching COVID-19, going into quarantine, and the fear that they may book a trip for that business to stop trading have grown significantly. This is understandable as we know more about this virus than we did back in March 2020. The longer this has gone on for, the more anxiety travellers will have in these three aspects.

Remember that 78.90% of people still wish to travel, be it internationally or domestically, so it is imperative that you have flexible terms and a Covid Policy in place to give your target consumers trust to book with you. Of course, we can not do anything about catching COVID-19 or going into quarantine as you are not in control of those aspects, but alleviating the other fears is within your control. If you do so, you may persuade some of those that are somewhat afraid of catching the virus to book with you. A combined 36.95% of travellers are willing to take the risk of going into quarantine at either end of the journey.

Question Three

If travel restrictions are lifted in 2021, what type of trips/holidays appeal most to you?



tma. tourism marketing agency

Again, when asking those surveyed what type of trip appeals to them the most in 2021, local and domestic wins hands down with 54.50% selecting this option. This further highlights that a local and domestic strategy will be key for the survival of many tour and activity providers.

For some destinations, a local target market seems impossible and I completely get that. But for many I have spoken to over the last year, this is because they are still thinking about how they can retrofit their current product range for this market. You may not be able to easily sell pizza-making classes to Italians, for example.

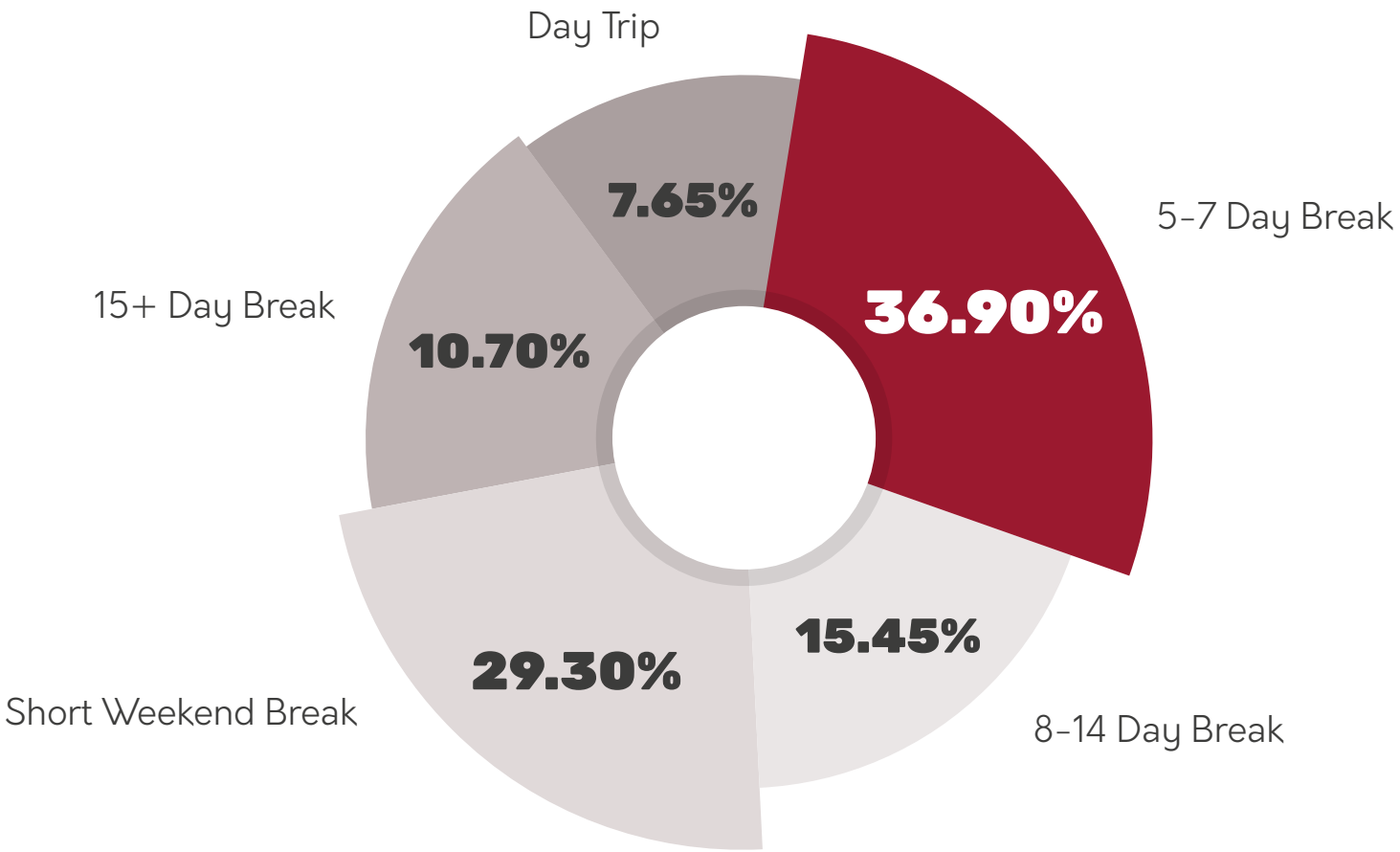
For some, this will mean a complete change of product focus and delivery. I understand that this change will probably come with an associated cost for some and may not feel worth the effort. But with 54.5% of travellers looking for local and domestic tourism opportunities, it may be the only option left to you if you wish to keep your business open.

Globally, 28.05% of people would still travel up to four hours away, so short-haul international flights, as advised previously, will become more commonplace until long haul opens up again. This does depend on your location. A four-hour flight from the UK for example, is very different to a four-hour flight from the US. In the US, shorter flights will most likely be from and to other US states, so short-haul flights still fall into the domestic camp (more on this in the North American section of the document). In that short-haul category, the furthest away US residents could travel would be Canada, Mexico, or South America for some, if allowed in.

These figures, combined with the vaccination map, really do start to paint a picture of what travel will be like in 2021 and beyond.

Question Four

When Covid is no longer a concern, how long will your first trip/holiday be?



tma. tourism marketing agency

So we have established that the majority of travellers would select local and domestic travel in 2021, but how long would they travel for?

Going by these figures, a combined 66.2% of travellers would prefer short weekends or week-long breaks. Although eight days and more is still attractive to a combined 26.15% of those surveyed, this may have a huge impact on those multi-day operators providing longer itineraries. If you do not provide a three-day or five/six-day product, you could be alienating a huge chunk of the market.

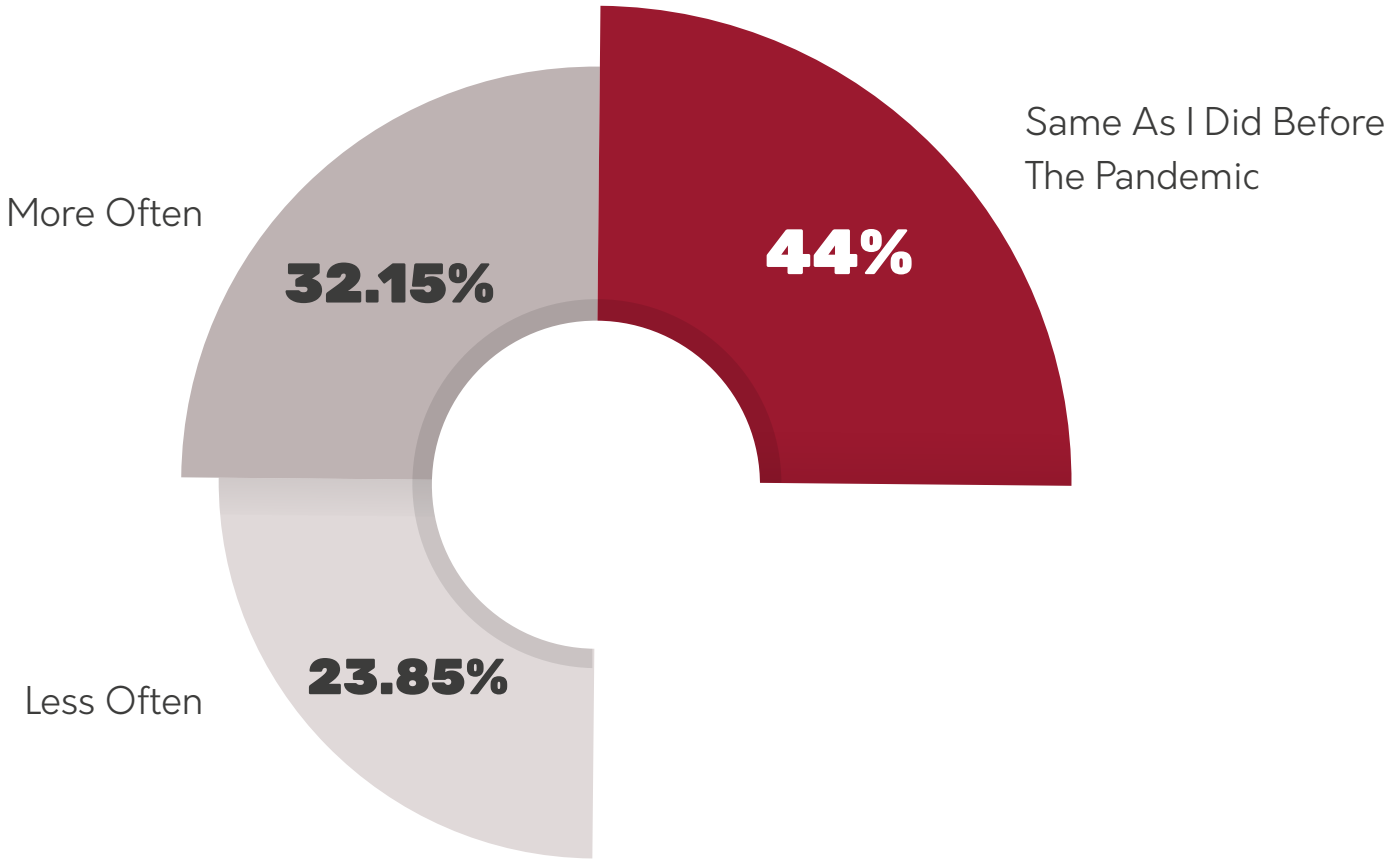
The shorter breaks are also very important for those of you who are day-tour operators or provide an attraction as travellers' time will be more limited. Remember, you are not competing against other operators per se, but you are competing for someone's time. A traveller can decide to go out for a meal, visit a museum, meet friends, take in a show, or a host of other forms of entertainment that your product is competing against. Operators are in the entertainment business, so it is other forms of entertainment you are competing with.

When marketing your product, keep in mind that those visiting your destination will have limited time, so 1- or 2-hour day tours may be advisable. A day-long tour may be something that will be harder to sell, especially if they are only visiting for three days.

If you happen to run and own an Airbnb or other form of accommodation, then you are in a strong position for this market in 2021.

Question Five

Post-Covid, do you intend to travel internationally...



tma. tourism marketing agency

With this question we wanted to see if being in lockdown and experiencing restrictions for the last year has driven people to desire international travel more.

Interestingly, 32.15% said they do wish to travel more, which is great news for our sector; 44% said they would travel around the same as they did before however, and 23.85% said they would travel less. This was something I expected given how devastating this pandemic has been on all our lives.

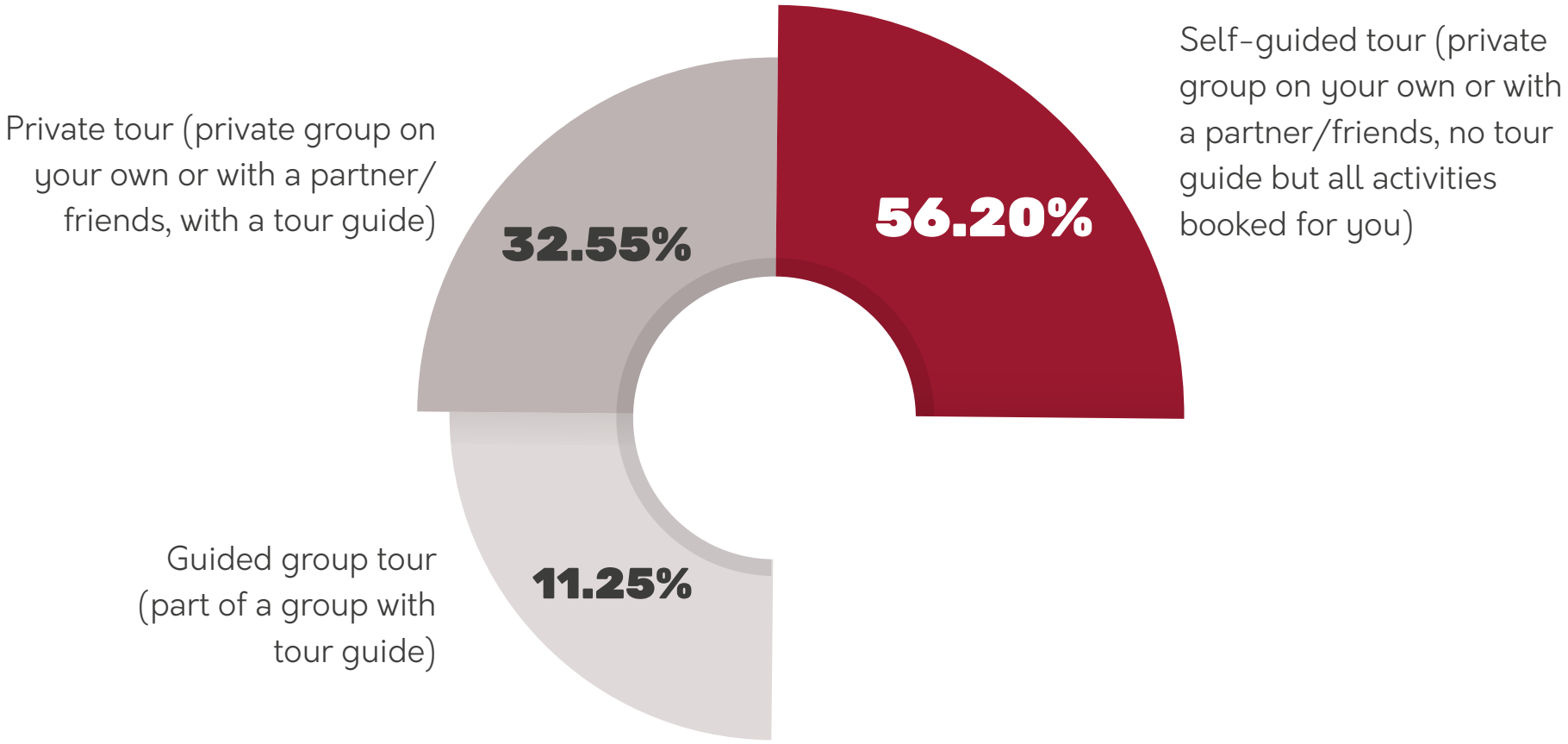
Some of it will be down to simply not being able to afford to travel as often as they would like, or indeed being fearful of catching the virus until a full rollout of the vaccine has been completed. Some will simply feel that travel has contributed to the situation we are in or that our planet is a little 'healthier' because of the reduced travel. Many factors are at play here.

However, a combined 76.15% of those asked will wish to travel internationally when they can, some more than others. This provides many opportunities for operators and activity providers to capture some of their time and money.

Take into account the previous question on the length of travel. While 44% of people wish to travel more, this will more likely be more short weekend breaks or week long breaks. They may just do more of them.

Question Six

When travelling in 2021, what types of tours or activities appeal to you most?



tma. tourism marketing agency

I was most interested to see the data for this question. Would the pandemic change the types of products that travellers wanted to purchase?

In 2019, at the height of tours and activities, the self-guided tour market was the biggest-growing sector at that time, and that was before the pandemic. That trend is only going to be intensified in 2021 and beyond because travellers will be looking for a more intimate, private experience, partly due to safety concerns.

From those we surveyed, a massive 56.20% would prefer to participate in a self-guided tour with their friends/family and without a tour guide present. An equally impressive 32.55% want a private tour with their own tour guide.

We have a number of our own clients who have or are in the process of developing alternative options of their products to cater for this market. In fact, I would encourage any operator to provide a self-guided option as this can provide a passive income. Think about it: you can offer the same product as you currently provide, at a cheaper price, but without the expense of a tour guide, giving you a bigger profit margin.

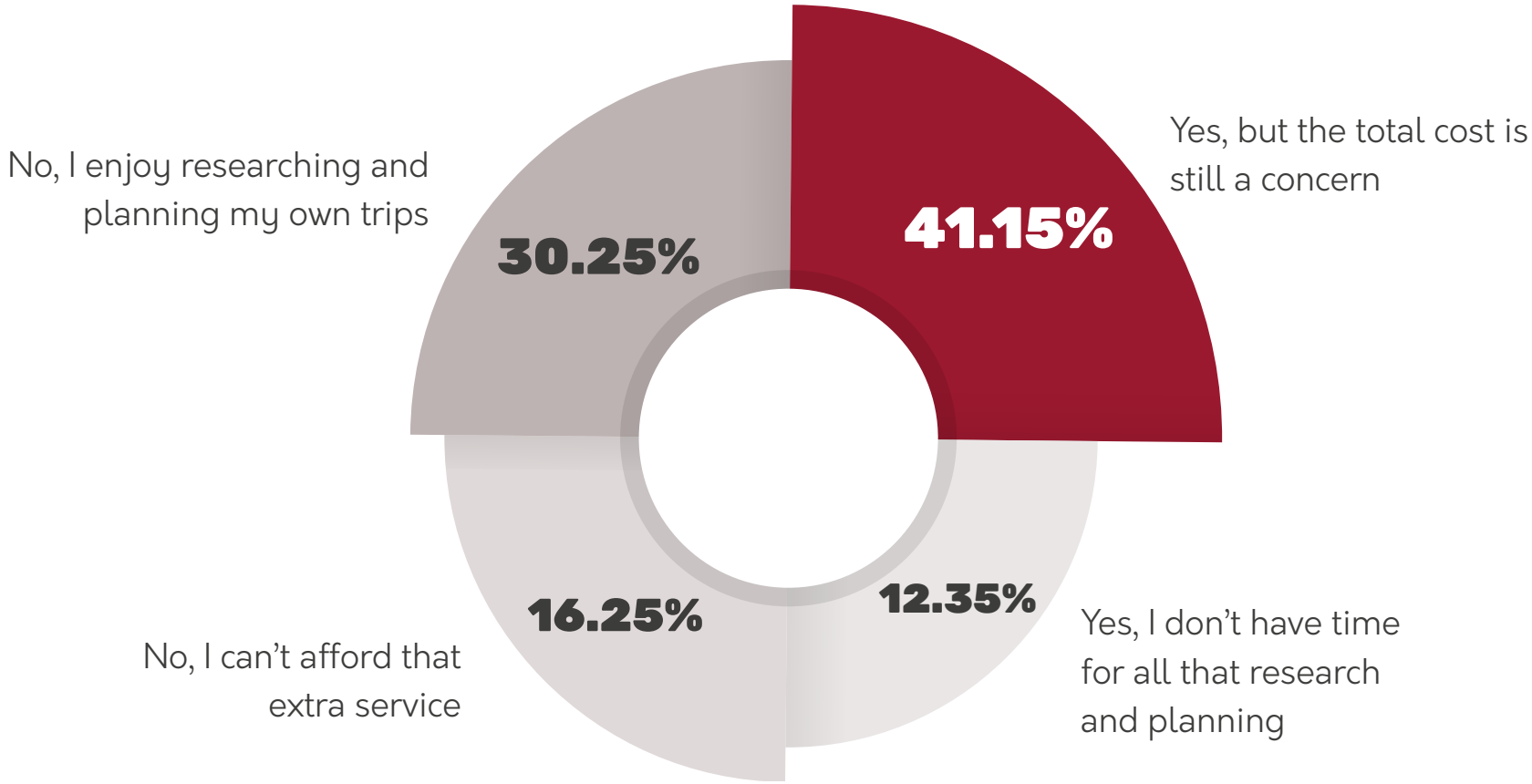
For multi-day providers, you organise every aspect for your customer, booking accommodation, tickets to attractions, transportation, etc, like you normally do, but let your customer take themselves along that journey. You can provide a travel guide to accompany them, or speak to businesses like Clio Muse or Autoura to create an audio or AI guide that can accompany them. One of our clients, Overland Ireland, have even created their own app for their self-drive option.

Day tour companies can also provide self-guided options using these apps and platforms to create a passive income. For me, this is more of a realistic option than the time and effort of creating virtual tours.

And no, this does not mean you are sacrificing your business and consumers will all of a sudden stop taking in-person tours. That will still be a big market. A great experience with a self-guided tour may convince some to try a guided tour further down the line. But, in any case, if both are generating you revenue and — more importantly — a profit, then it's win-win.

Question Seven

Would you pay more to have everything booked and organised for your trip?



tma. tourism marketing agency

If self-guided tours are the most desired by travellers, would they pay more to have everything organised for them?

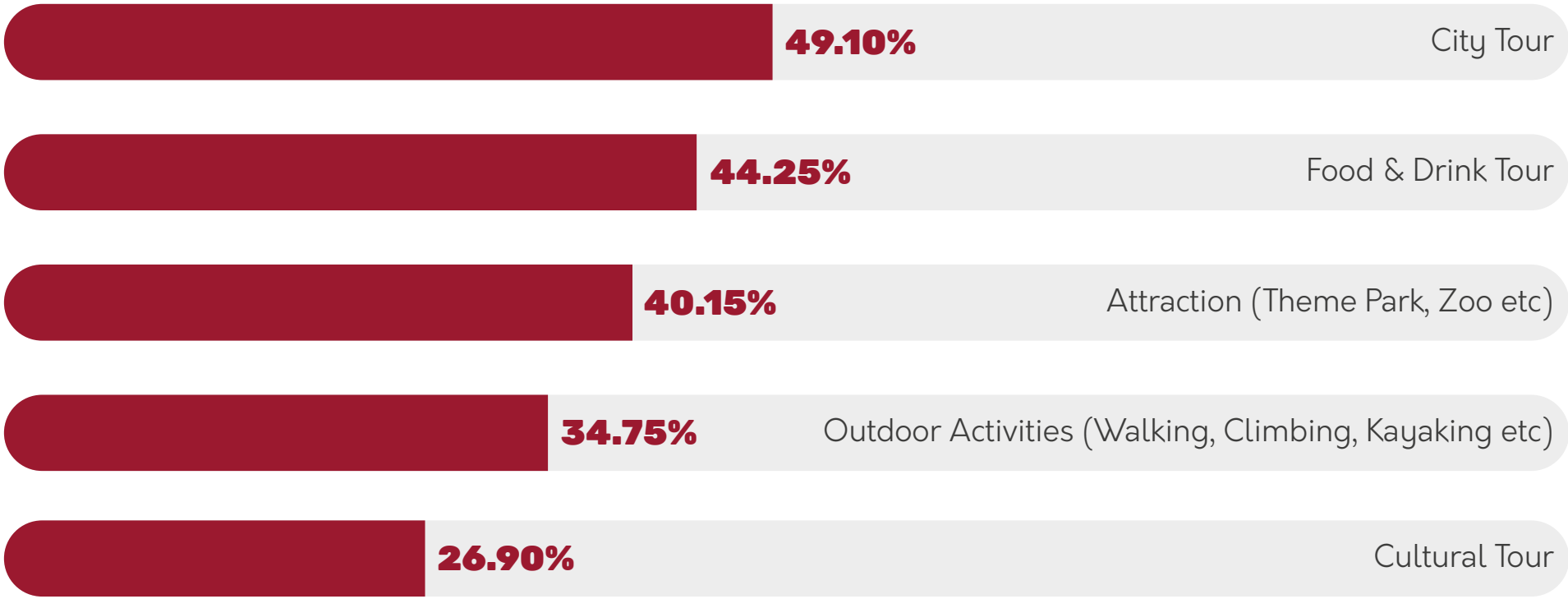
Going by the figures, a combined 53.5% of those asked would pay more to have everything planned and booked for them. 12.35% simply don't have the time to do it themselves, with 41.25% saying they would but the total cost would still be a concern. This highlights that more than half would prefer to have everything organised for them and pay for the privilege, as long as the increase in the cost is not absurd.

Have a think about what has happened over the last 12 months. We have all been 'stuck' in limbo and a good majority of travellers would pay a premium just to experience 'something' again. That USD$120 day tour that might have put someone off before may seem more attractive now as people will just say 'screw it, I want to have some fun again'. Play on this aspect in your marketing and, whatever you do, do not reduce your prices! I know some disagree with me on this but I feel travellers will pay a little more than the normal asking price just so they can experience something again.

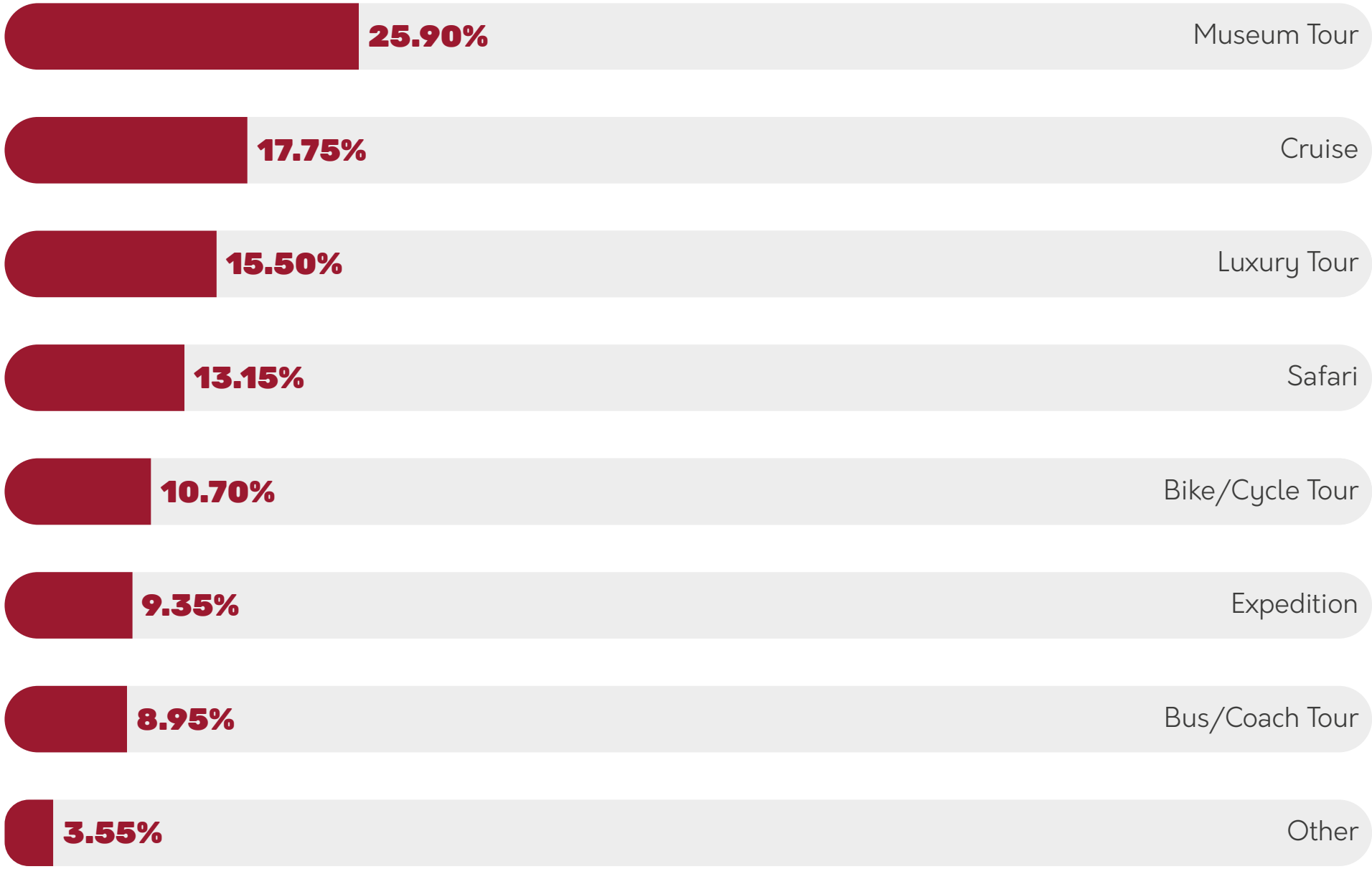
Do, however, take into account that a combined 46.5% still prefer to research and do all the organising themselves, or simply can't afford to pay more. This is why it is very important to have both self-guided and guided options on your tours at varying prices and a varying number of hours/days.

Question Eight

Which tour or activity are you most looking forward to once travel opportunities are available again? (select your top 3)



tma. tourism marketing agency


25.90%
Museum Tour
17.75%
Cruise
15.50%
Luxury Tour
13.15%
Safari
10.70%
Bike/Cycle Tour
9.35%
Expedition
8.95%
Bus/Coach Tour
3.55%
Other

So we have established that most travellers are looking for local/domestic travel, short weekend or week-long breaks, and self-guided tours, but what type of tours are they interested in? We asked for their top three.

Overall, city tours are the most desired, closely followed by food and drink tours and attractions. This is a shift from outdoor activities, which is still very popular, but it seems consumers have shifted their preference to the other three. Overall, this is great news for day-tour providers that offer these products and, of course, multi-day operators who have this as part of their itinerary.

What I do find very interesting is that bus/coach tours are way down the list of priorities. Personally, I like taking a bus tour in a destination when I arrive as it helps me get my bearings of a city, but it seems this may be less popular for many going forward. We can assume one reason being the thought of a confined vehicle with complete strangers and the health and safety aspects of that. Remember, however, that the preference for travellers is self-guided tours, so taking their own transport or hiring a vehicle for their own use will be more attractive. This is great news for camper van and motorhome providers.

I am not surprised food and drink tours are high on the list, as this is a great way to bring people together, and it was a growing market pre-covid. But I am surprised that bike/cycle tours are that far down the list of priorities. That's another growing market that I suspect may be higher in specific destinations. Something we look at later.

For those who said 'other', there was a clear trend of wanting to visit family and friends. As you can imagine, this is very important to a lot of people, so creating products that cater for family get-togethers may be an option for some.

Some of the 'Other' entries entered in our research....

- Anything With My Best Friend
- Beach Holiday
- Beach Resort
- Beach Tour
- Business
- Camping
- Camping And Fishing
- Caravanning
- Contract Bridge Cruise
- Disney World
- Getting Together With Family
- Motor Sport
- Just Getting Away And Experiencing A Different Setting And Down Time
- Nothing In Particular, Just Having Fun
- Outback Nature Tour
- Private
- Quiet Holiday
- Relaxation
- Resort
- Road Trip
- See The NBA
- Seeing Friends
- Self Exploration
- Skiing
- Sports Events
- Tropical Vacation
- Walking
- Wellness
- Zoo

Question Nine

If you could travel to any country by the end of 2021, which country would that be?

Top Ten Destinations

tma. tourism marketing agency

This was an open-ended question to help get a feel of the consumer's desired destination if given the choice to travel to any country or region. This data is handy for those who attract international customers; later in this document, we break this down per region.

From all those we asked, and despite it being one of the worst-affected destinations during the pandemic, Italy was the most desired destination, which is very encouraging for those operating in Italy. Japan was a close second and with France, Spain, Australia making it into the top five.

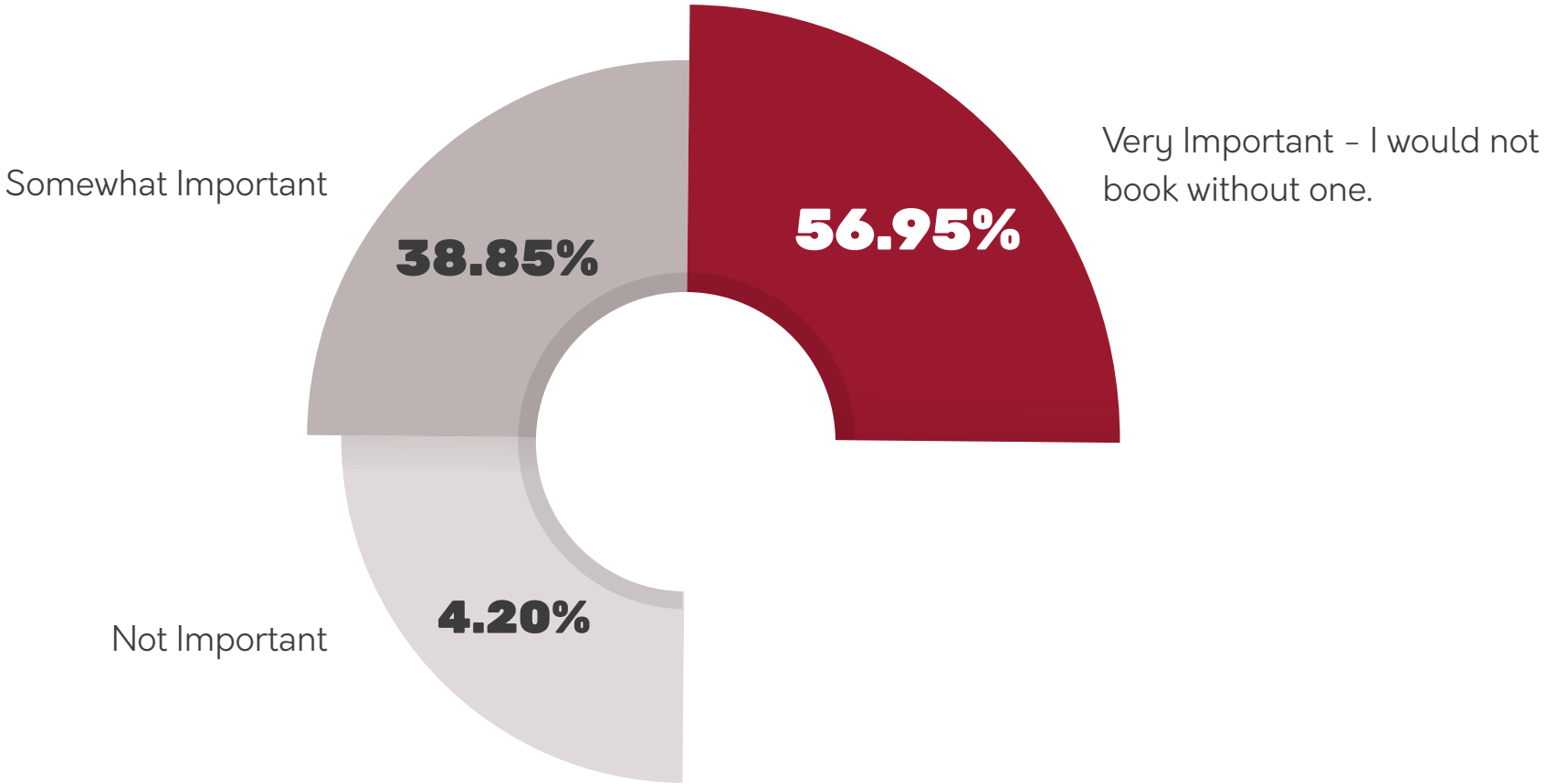
While this does not mean they can travel to these destinations currently, it does provide some insights into travellers' desired destinations. This helps inform your marketing; targeting specific travellers to book for later in 2021, 2022, or 2023 (depending on the vaccination rollout as highlighted in the map) may be an option for some of you.

If you are in Italy, for example, focusing on a short weekend break, targeting those within a 3-4 hour journey radius and offering a self-guided product may be what attracts a good majority of travellers.

Australia is, at the time of writing, only really open to domestic travel because of the stringent quarantine restrictions on arrival. Targeting Australians and those in New Zealand would be the main focus for this year if I were an operator there.

Question Ten

How important is a Covid Guarantee Policy in your booking decisions? (for example, a policy that allows you to move dates or offer full/partial refunds etc)



tma. tourism marketing agency

With this question, I wanted to highlight how important it will be for your business to have a Covid Guarantee Policy or some form of flexible terms.

The numbers speak for themselves: 56.95% of travellers will not even book with a company if they do not have one. That is a huge number and is why I urge you to make sure you have flexible terms displayed prominently on your website and in your marketing materials.

Another 38.85% said it is somewhat important, so this will still be massively important to those more willing to book. A policy is more likely to persuade them over someone who does not offer one. This is a combined 95.8% of travellers who would expect some form of flexibility when booking a travel-related product.

You must provide flexible booking terms to give consumers confidence in your business. By not providing flexible terms, you're giving the impression that you do not care about their fears.

If you are a multi-day operator, think about allowing travellers to pay a small deposit with the rest payable 30 days before the start date, or even a subscription over a period of time to help generate regular income for you and your business. Allow the traveller the ability to easily change dates as many times as necessary.

For day-tour operators, why not offer to reserve a spot for free, or 50% upfront and the rest 24 hours prior to the start date. Again, allow them to easily change dates as many times as necessary.

Even when covid is a distant memory, travellers will not go back to how it was. They will expect and demand the same treatment, so more flexible terms are here to stay. Bear that in mind for the future of your business and marketing strategies.

North America Consumer Mindset & Intent

We will now break down the statistics, highlighting the North American region specifically. Starting with the key takeaways to compare the North American market to the global results, this section offers insights into region-specific trends for 2021 and beyond.

Destinations: US, Canada
Age Groups: 18-54+
Gender: Male & Female

tma. tourism marketing agency

Key Takeaways

Globally, 38% of respondents will only travel domestically as soon as it's allowed, while a small majority of respondents (41%) say they will travel internationally as soon as it's allowed

This question was posed with the opportunity to wait until vaccinations were prevalent before traveling at all. By including the potential for vaccinations to alter travel booking decisions, we can compare this data with a later question that removes the vaccination factor altogether.

Meanwhile, **49% of respondents in Canada and the US will only travel domestically, while 34% plan to travel internationally**, which is a much more dramatic split than the global response.

Takeaway: US and Canadian operators MUST offer products that appeal to the local demographic. Otherwise, you're missing out on a big opportunity.

Globally, 55% of respondents are most attracted to local/domestic travel if restrictions are all lifted in 2021. Only 17% of respondents are interested in a long-haul trip.

This is even more pronounced with 64% of respondents in Canada and the US planning to stay domestically.

Takeaway: Americans and Canadians are more likely than the global average to look for a staycation. North American operators have more reason than most others to focus on tours and activities that appeal to domestic tourism.

Globally, only 11% of respondents say a group guided tour is most appealing for 2021 travel.

However, North Americans were the most willing to take a group guided tour, with 16% of respondents saying that style of travel is most appealing to them in 2021.

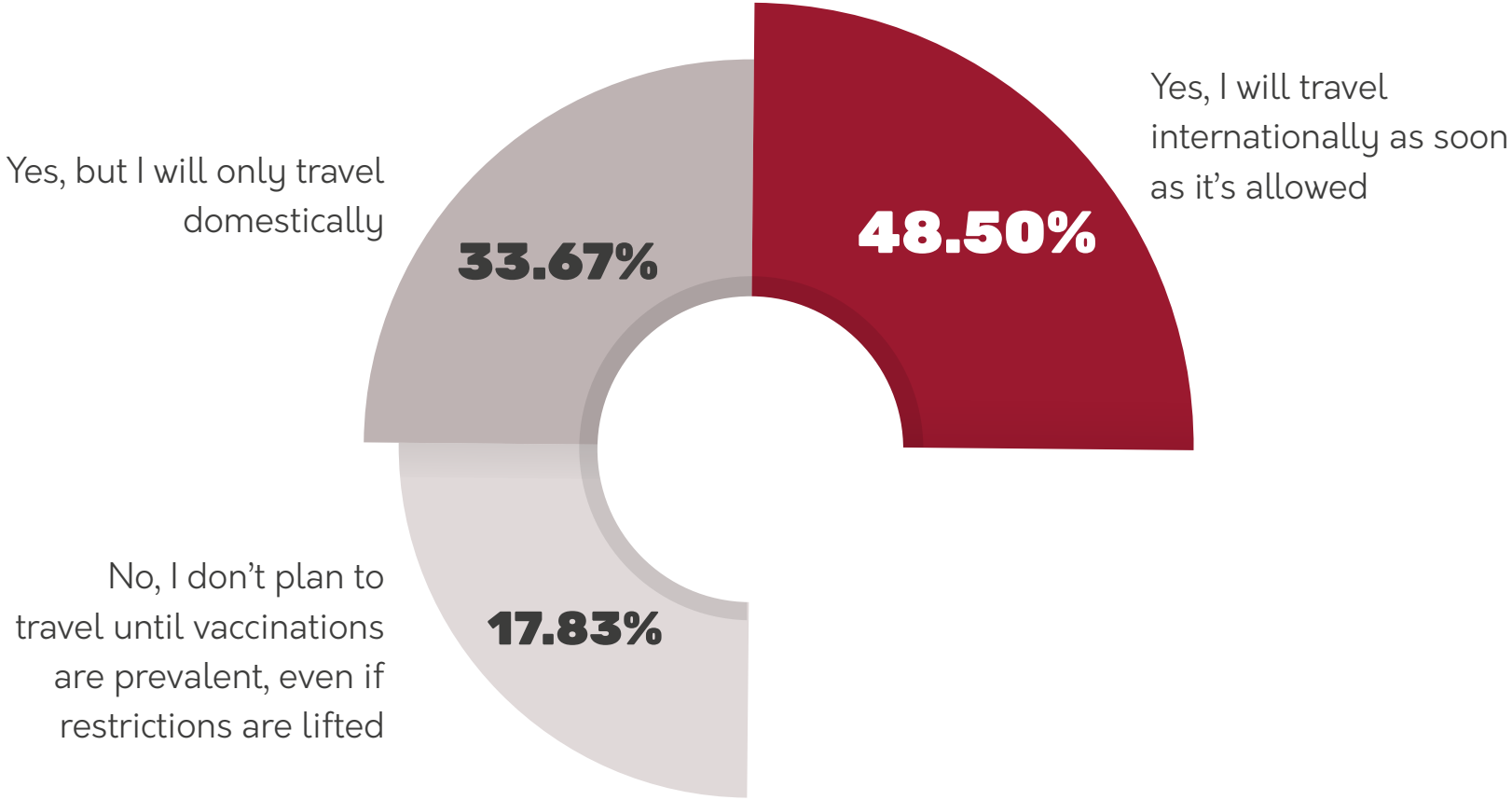
Takeaway: There is no need for North American operators to abandon group tours. That said, it's recommended to consider changing some of the features so that they appeal to a domestic audience.

Globally, 12% of respondents say they don't have time to research and plan their travels, so they would be willing to pay more to have that handled for them. At 16%, North American respondents were most likely to say they didn't have enough time to do all the research and planning.

Takeaway: When North American operators are developing products for domestic tourists, add as many features or services as possible that reassure potential customers that you are taking care of the research and logistics associated with planning an experience. This takeaway also relates to self-guided opportunities: North Americans are more likely to not have time to plan, so they'll be drawn to pre-arranged itineraries.

Question One

Do you plan to take a trip/holiday as soon as any travel restrictions are lifted?



tma. tourism marketing agency

Focusing on the North American market, we can see that a combined 82.17% wish to travel as soon as they can. However, 48.50% will only travel domestically, which is understandable due to the nature of the destination, with so many states to visit.

North America bucks the trend from the average worldwide response, with only 17.83% saying they will not even travel until vaccinations are more prevalent.

While, globally, travellers are very closely split between wanting to travel domestically and internationally (when considering the vaccination factor), the North American responses had a dramatically wider margin between the choices. Only 33.67% of those surveyed plan to travel internationally right away; a much larger proportion will only travel domestically.

So what does this mean for North American marketing strategies?

Those operators in other countries who target and rely on the North American market have to take into account that more than half of their intended market may not wish to travel internationally. For example, Ireland and Scotland have strong connections with North America, so if you are a destination who hopes this will increase significantly in 2021, I would aim more for 2022 and beyond so be 'safe' (if there is such a thing in today's landscape).

For those based in the US or Canada, this is great news as it makes for a strong domestic market and goes along the lines of what I have been advising our customers on the other side of the pond.

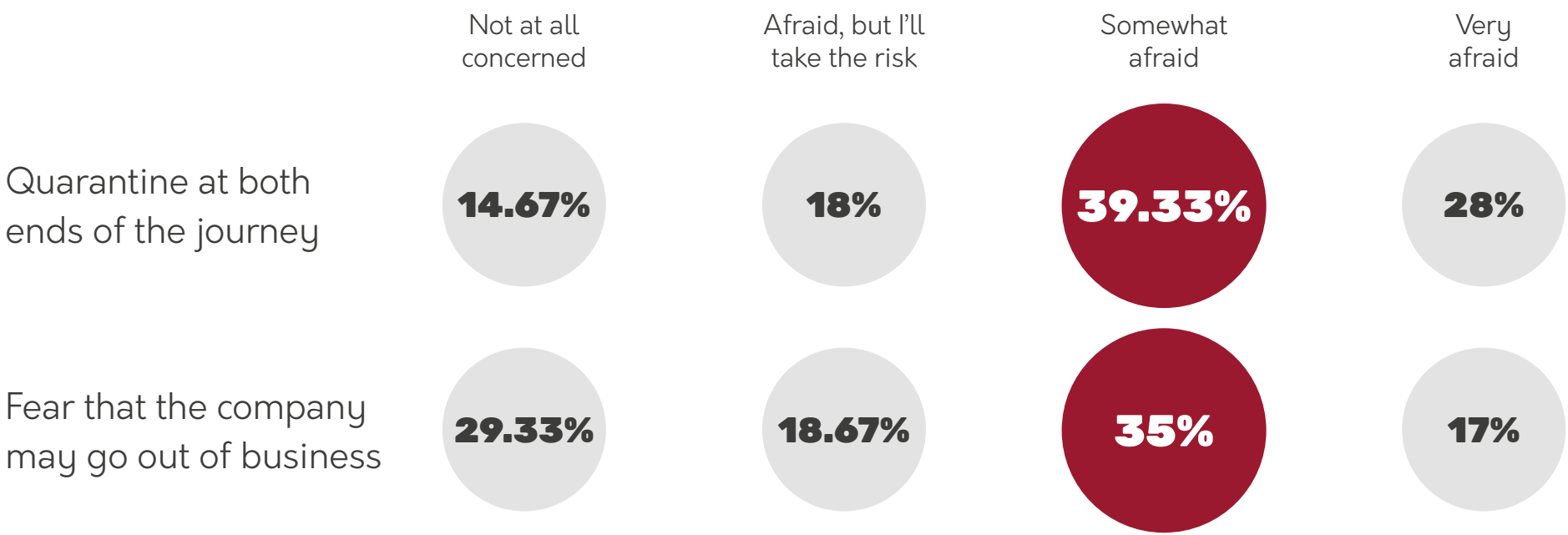
If you can, have two strategies: one to focus on domestic travellers as this will be what opens up first, and another to target international travellers for 2022 and beyond.

Question Two

In regards to booking a trip, how fearful are you about each of the following?

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Catching Covid-19	13.17%	20.33%	37.33%	29.17%
Losing my deposit	19.17%	19%	40.33%	21.50%
Not having the ability to change my journey date	19.83%	19.83%	42.33%	18%

tma. tourism marketing agency



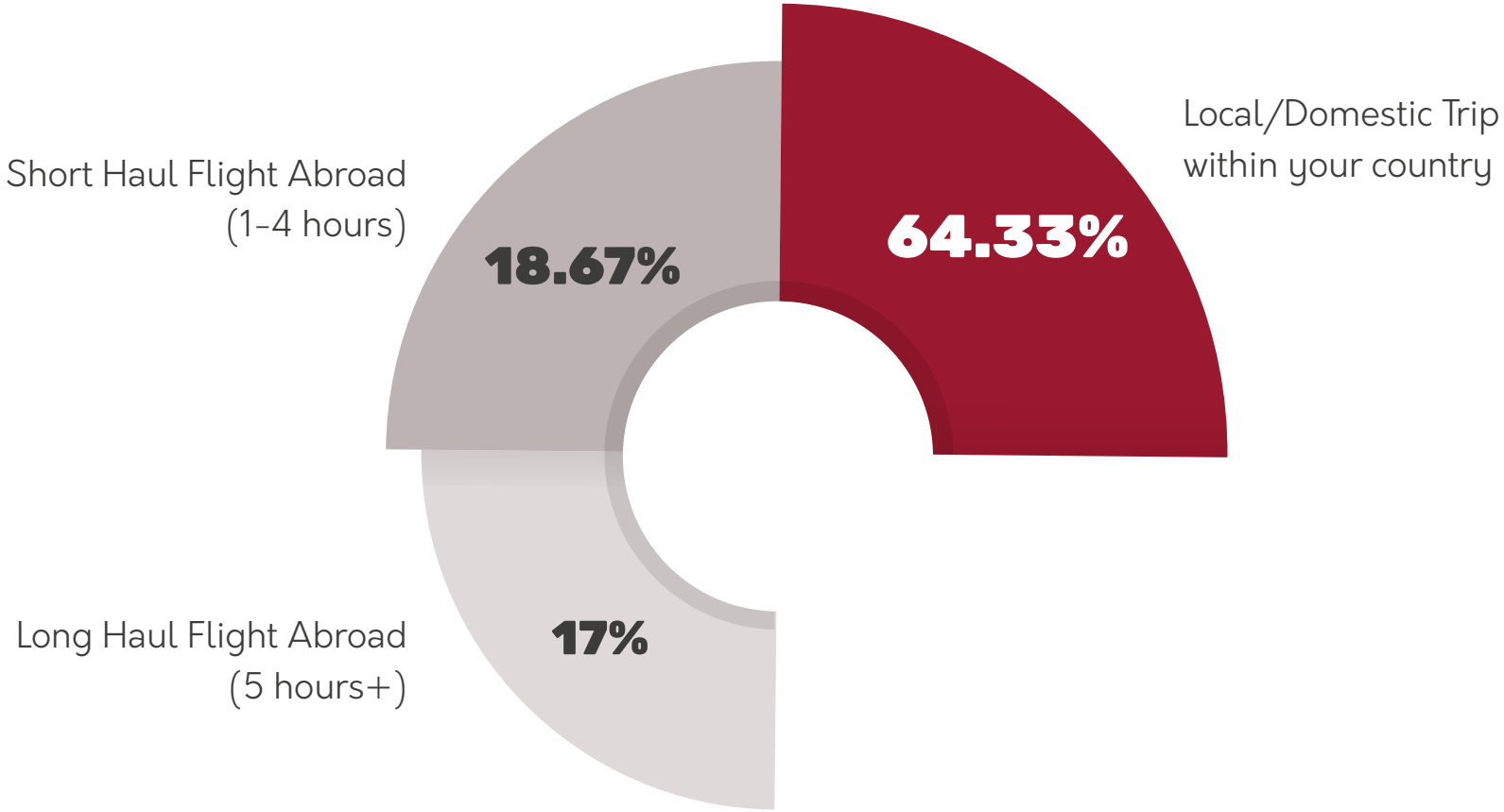
Like everywhere else at the start of this pandemic, qualitative insights showed us that the main fear for travellers was the thought of losing their deposits and money booked on trips. This, and not having the ability to change dates without repercussion was high on their minds. This has now changed a little, but less than the worldwide average.

While those are still very important factors for travellers, catching COVID-19, going into quarantine, and the fear that they may book a trip for that business to stop trading has grown. This is understandable as we know more about this virus than we did back in March 2020.

Remember: 82.17% of travellers in North America still wish to travel, more so domestically. We cannot ignore that more than 60% of travellers say losing their deposit or not having the ability to change dates makes them somewhat or very afraid. It is imperative that you have flexible terms if this is your target market. While you cannot greatly impact fears of catching the virus or going into quarantine at either end of the journey, you can control the terms of booking that make travellers nervous right now.

Question Three

If travel restrictions are lifted in 2021, what type of trips/holidays appeal most to you?



tma. tourism marketing agency

Again, asking those surveyed what type of trip appeals to them the most in 2021, local and domestic wins hands down with a massive 64.33% selecting this option. This further highlights that a local and domestic strategy will be key for the survival of many tour and activity providers in North America. It also shows the reality for international destinations targeting North American travellers: in 2021, the total number of inbound North American travellers will be much lower and competition will therefore be much higher.

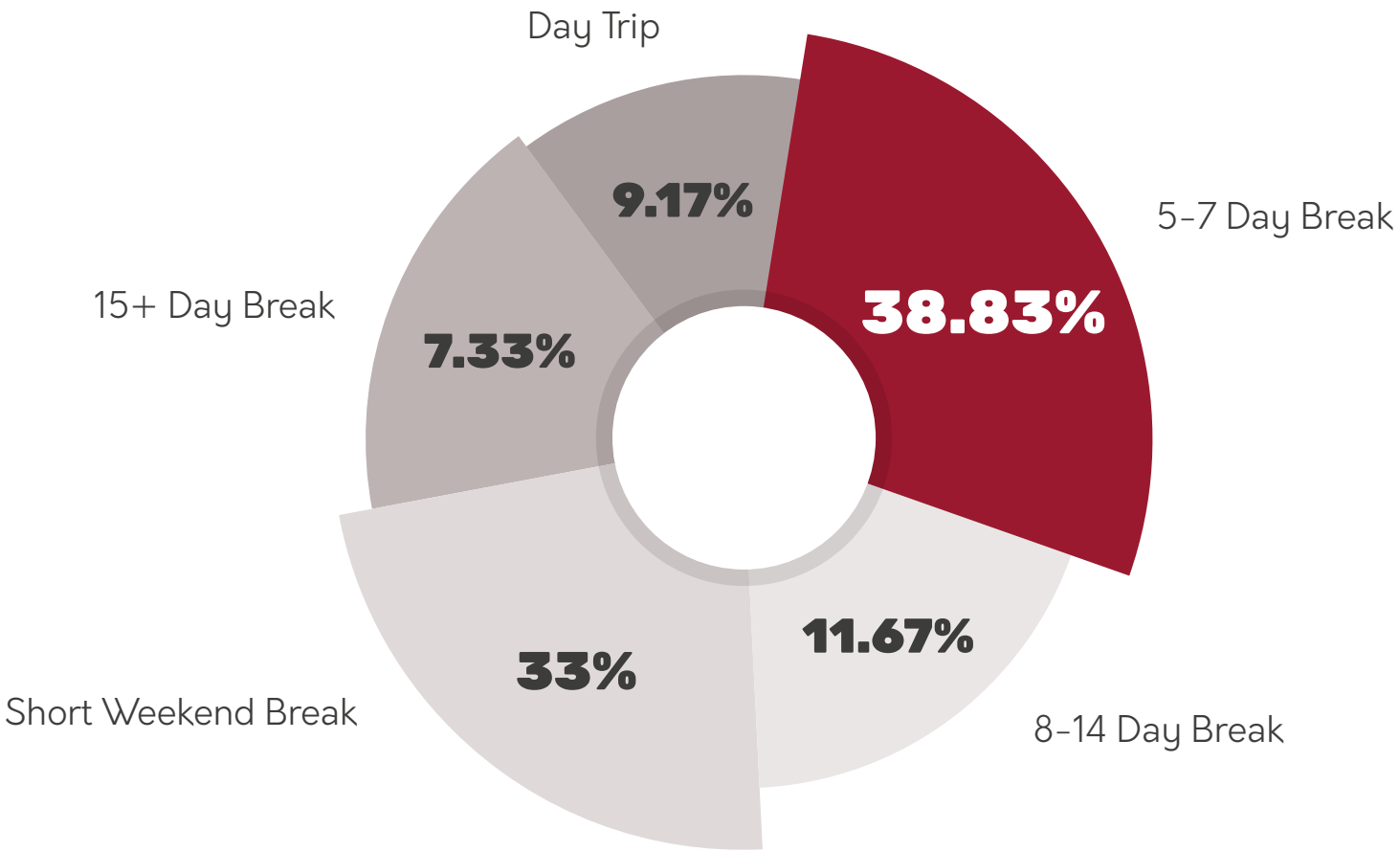
For some in North America, this will mean a complete change of product focus and delivery. I understand that this change will probably come with an associated cost for some and may not feel worth the effort, but with 64.33% of travellers looking for a local and domestic product, it may be the only option left to you, if you wish to keep your business open.

For North Americans, the interest in short- and long-haul international travel is fairly evenly split, likely due to geography and the distance to cover for any international journey. With a combined 35.67% interested in international travel, but only 17% considering a long haul journey. So if you are a destination that relies heavily on this market, we cannot expect 2021 travel to go back to 2019 levels. It will improve from the current situation, but growth will be slower, so aim for this picking up more in 2022, all going well.

North America is unique in that, as a people, travelling longer distances to visit friends and family or to take a road trip is more the norm, more so than for those in the UK and Europe. In the UK, we complain if we travel more than 10 minutes on a bus! This is why domestic travel has always been strong in the US, meaning that more operators and attractions are already geared towards it, but some will still have a job to do to refocus their energy.

Question Four

When Covid is no longer a concern, how long will your first trip/holiday be?



tma. tourism marketing agency

So we have established that the majority of travellers would select local and domestic travel in 2021, but how long would they travel for?

Going by these figures in North America, a combined 71.83% of travellers would prefer short weekends or week-long breaks. This is not surprising as, unlike a lot of other destinations, vacation time in North America is more or less limited to two weeks. In the UK, it's more like 4-5 weeks, so when you market to a North American audience you must take this into consideration. Time to take a trip is limited, so what and who they spend their hard-earned cash on is arguably more important.

The shorter breaks are also very important for those of you who are day-tour operators or provide an attraction, as travellers' time will be more limited. Remember, you are not competing against other operators per se, but you are competing for someone's time. A traveller can decide to go out for a meal, visit a museum, meet friends, take in a show, or a host of other forms of entertainment that your product is competing against. Operators are in the entertainment business, so it is other forms of entertainment you are competing with.

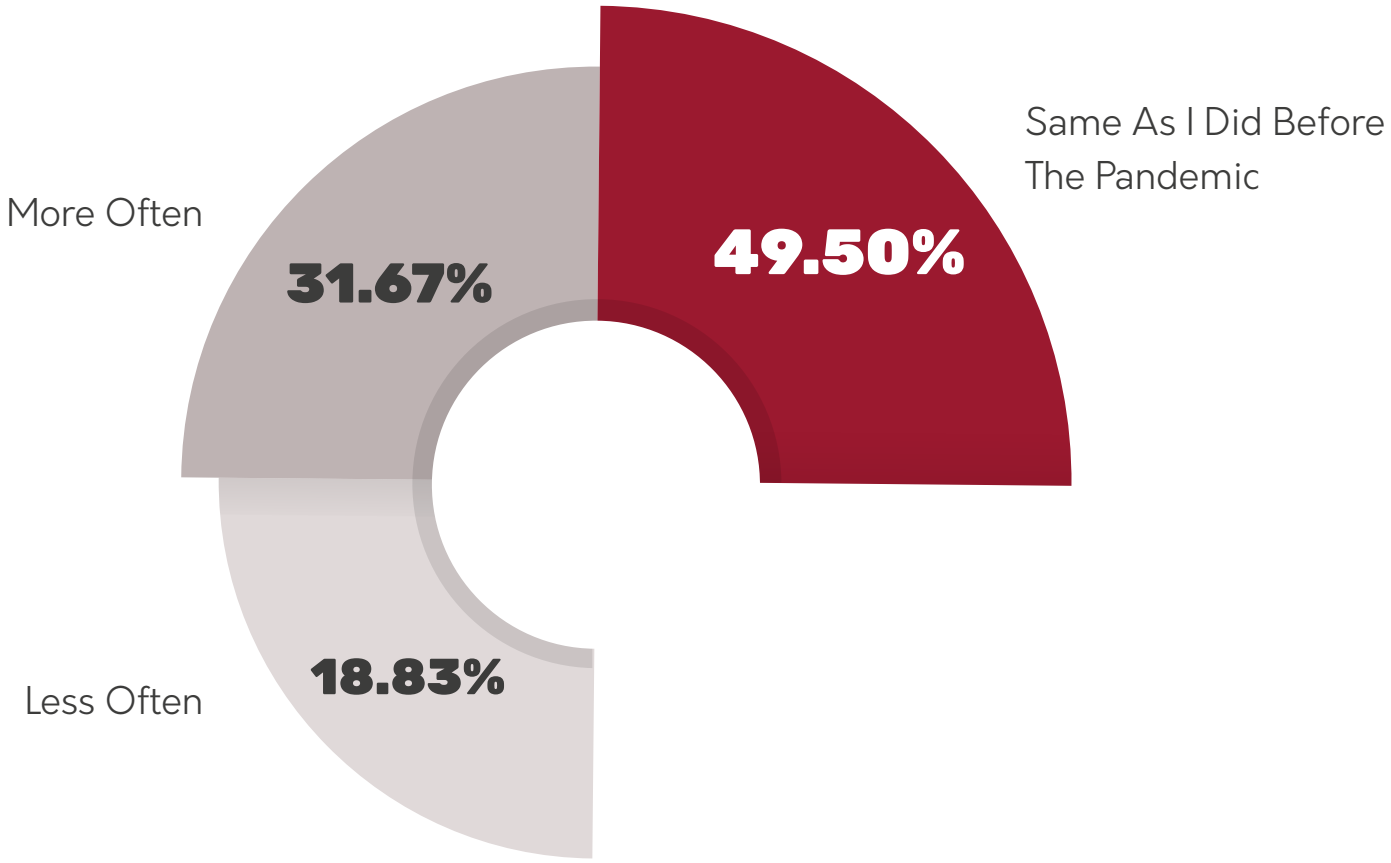
For operators in North America looking to target international customers, look at those destinations close by. The usually-strong UK market, along with parts of Europe, will either be unable or less willing to travel that far a distance this year. Likewise for those who target the North American market from international destinations.

When marketing your product, keep in mind that those visiting your destination will have limited time, so 1- or 2-hour day tours may be advisable. A day-long tour may be something that will be harder to sell, especially if they are only visiting for three days.

If you happen to run and own an Airbnb or other form of accommodation, then you are in a strong position for this market in 2021. Hiring vehicles and motorhomes or RVs will also be more in demand in 2021.

Question Five

Post-Covid, do you intend to travel internationally...



tma. tourism marketing agency

With this question we wanted to see if being in lockdown and experiencing restrictions for the last year have driven people to desire international travel more or less than before.

Interestingly, 31.67% said they do wish to travel more, which is great news for those who target this demographic. A further 49.50% said they would travel internationally around the same as they did before, while 18.83% said they would travel less, and this was something I expected.

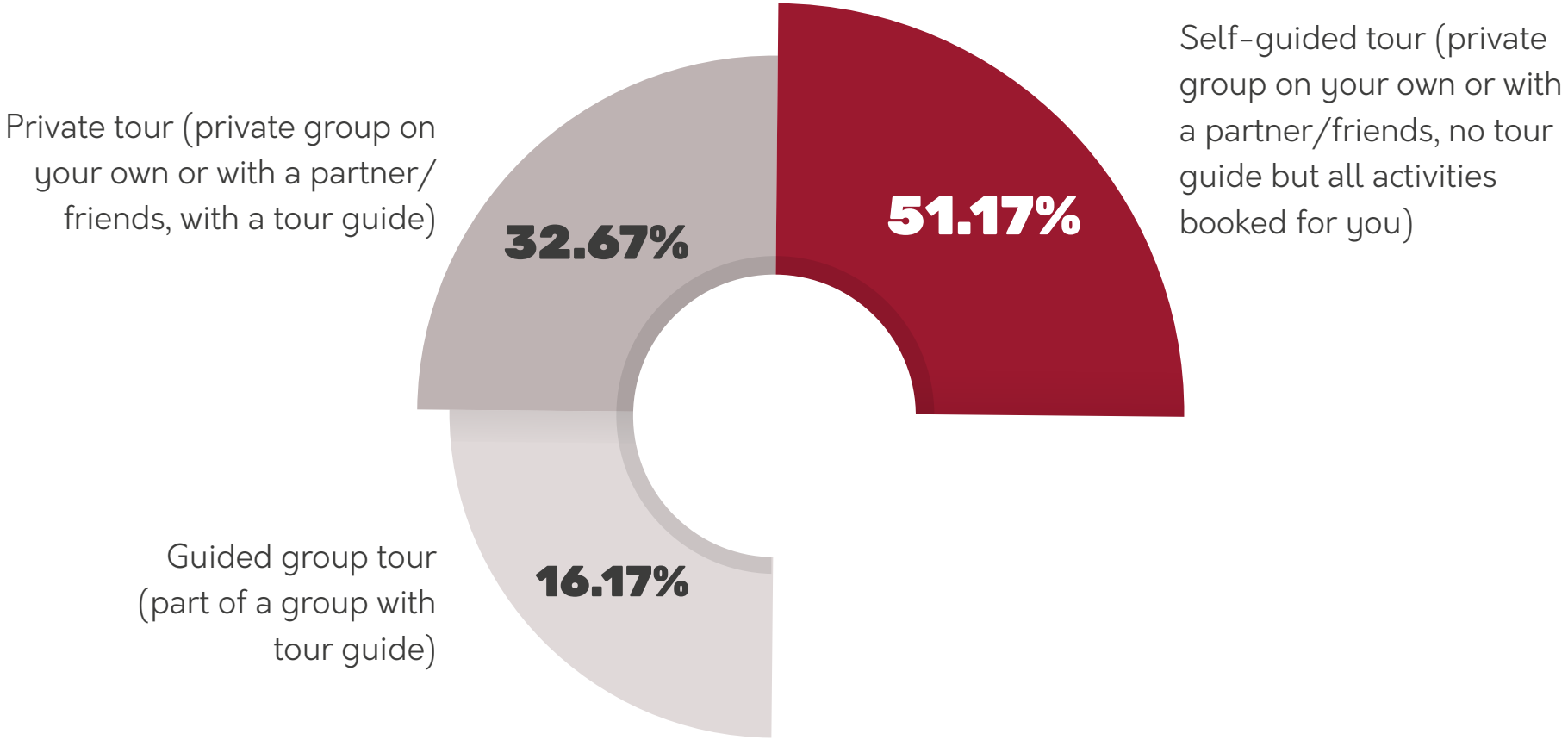
There are many factors at play here as travellers consider decreasing their international travel. For some, financial concerns after a challenging year will limit big trips; others will still be wary of the virus until vaccinations are fully rolled out. Some will simply feel that travel has contributed to the situation we are in or that our planet is a little 'healthier' due to reduced travel.

However, a combined 81.17% of those asked do wish to travel internationally when they can, some more than others. This provides many opportunities for operators and activity providers to capture this market. Just keep in mind that this will more than likely be in 2022 and beyond.

Also take into account the previous question on the length of travel: 49.50% of people wish to travel more, but this will mostly consist of short weekend breaks or week-long breaks. We may just see more frequent shorter trips.

Question Six

When travelling in 2021, what types of tours or activities appeal to you most?



tma. tourism marketing agency

This was one question that I was most interested in seeing responses to. Would the pandemic change the types of products that travellers desired?

In 2019, at the height of tours and activities, self-guided tours was the biggest-growing sector at that time, and that was before the pandemic. That trend is only going to be intensified in 2021 and beyond because travellers will be looking for a more intimate, private experience, partly due to safety concerns.

From those we surveyed, a massive 51.17% would prefer to participate in a self-guided tour with their friends/family and no tour guide. An equally impressive 32.67% want a private tour with their own tour guide. While only 16.17% of travellers are interested in a guided group tour this year, that is the largest percentage of any regional market we surveyed, so there is still a domestic market for operators based in North America.

We have a number of our own clients who have or are in the process of developing alternative options of their products to cater for this market. In fact, I would encourage any operator to provide a self-guided option as this can provide a passive income. Think about it: you can offer the same product as you currently provide, at a cheaper price, but without the expense of a tour guide, giving you a bigger profit margin.

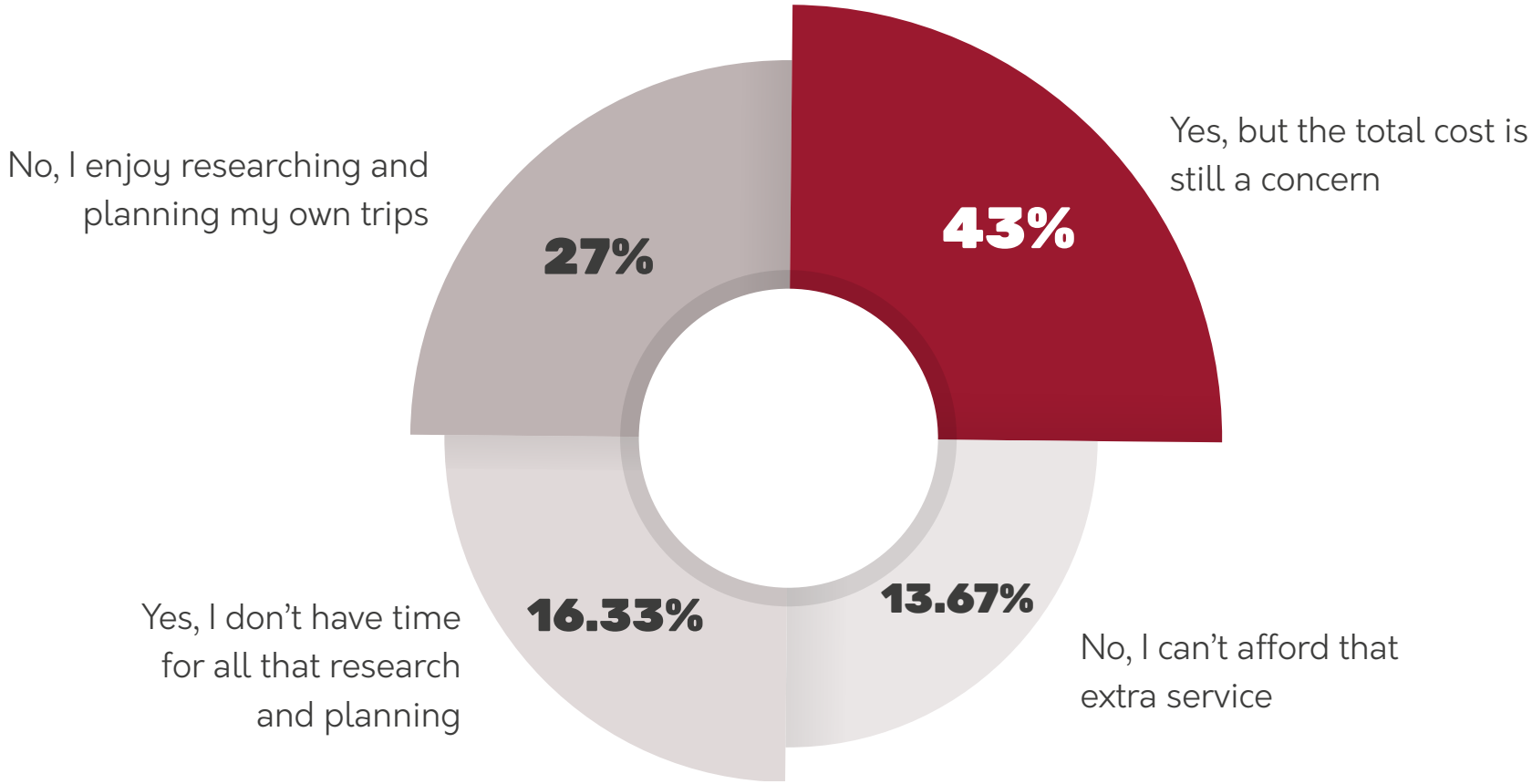
For multi-day providers, you organise every aspect for your customer, booking accommodation, tickets to attractions, transportation, etc, like you normally do, but let your customer take themselves along that journey. You can provide a travel guide to accompany them, or speak to businesses like Clio Muse or Autoura to create an audio or AI guide that can accompany them. One of our clients, Overland Ireland, have even created their own app for their self-drive option.

Day tour companies can also provide self-guided options using these apps and platforms to create a passive income. For me, this is more of a realistic option than the time and effort required to create virtual tours.

And no, this does not mean you are sacrificing your business and consumers will all of a sudden stop taking in-person tours. That will still be a big market. A great experience with a self-guided tour may even convince some to try a guided tour with your company further down the line. But, in any case, if both are generating you revenue and — more importantly — a profit, then it's win-win.

Question Seven

Would you pay more to have everything booked and organised for your trip?



tma. tourism marketing agency

If self-guided tours are the most desired by travellers, would they pay more to have everything organised for them?

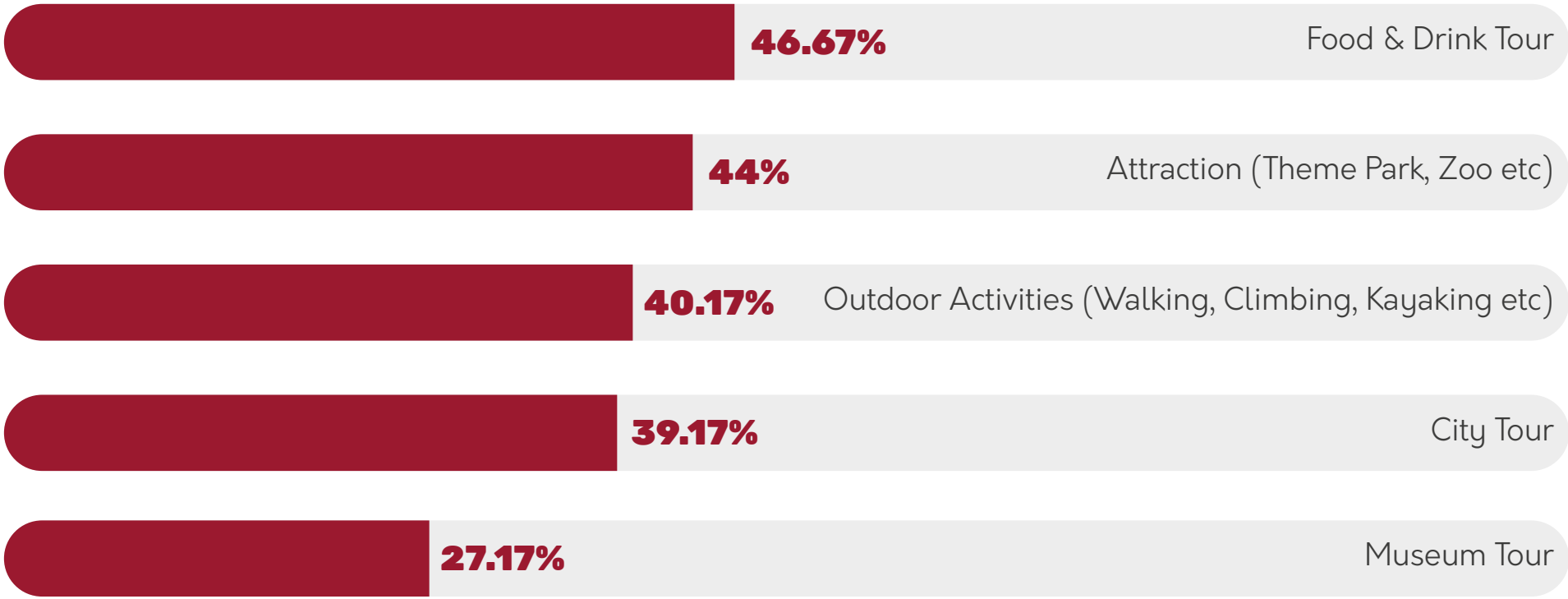
In the North American market, a combined 59.33% of those asked would pay more; 16.33% simply don't have the time to do it themselves, and 43% say they would pay more but the total cost would still be a concern. This highlights that more than half would prefer to have everything organised for them and would pay for the privilege, as long as the increase in cost is acceptable.

Have a think about what has happened over the last 12 months. We have all been 'stuck' in limbo and a good majority of travellers would pay a premium just to experience 'something' again. That $120 day tour that might have put someone off before may seem more attractive now as people will just say 'screw it, I want to have some fun again'. Play on this aspect in your marketing and, whatever you do, do not reduce your prices! I know some disagree with me on this but I feel travellers will pay a little more than the normal asking price just so they can experience something again.

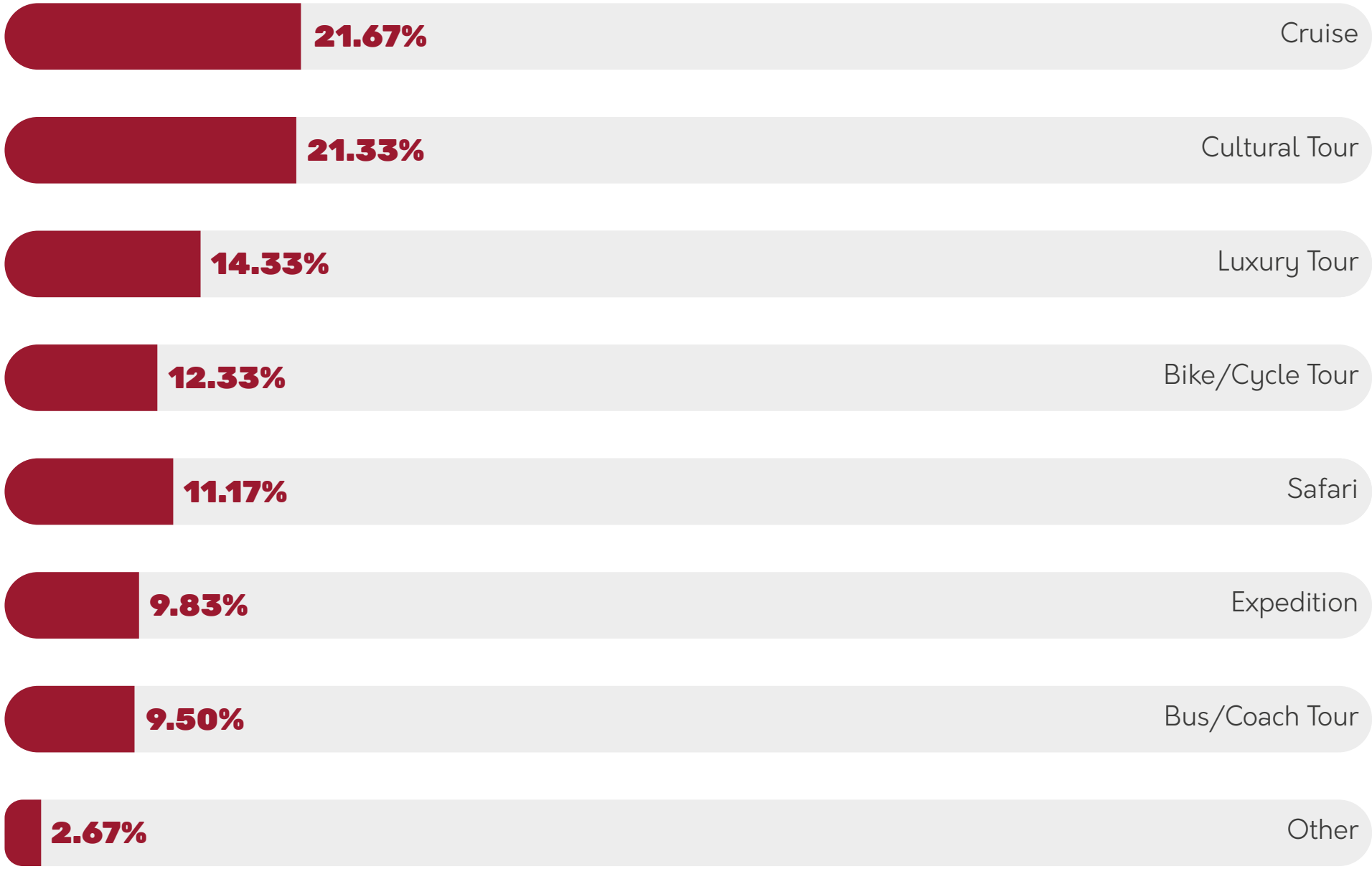
Do, however, take into account that a combined 40.67% still prefer to research and do all the organising themselves, or simply can't afford to pay more. This is why it is very important to have private, self-guided, and guided options on your tours at varying prices and varying number of hours/days.

Question Eight

Which tour or activity are you most looking forward to once travel opportunities are available again? (select your top 3)



tma. tourism marketing agency


21.67%
Cruise
21.33%
Cultural Tour
14.33%
Luxury Tour
12.33%
Bike/Cycle Tour
11.17%
Safari
9.83%
Expedition
9.50%
Bus/Coach Tour
2.67%
Other

So we have established that most travellers are looking for local/domestic travel, short weekend or week-long breaks, and self-guided tours, but what type of tours are they interested in? We asked for their top three.

Overall, food and drink tours are the most desired, closely followed by attractions and outdoor activities. Unlike the worldwide average, city tours, while sitting in fourth place, are not as attractive as those other three.

What I do find very interesting is, despite the bad press of late, cruises are much higher than expected and this is encouraging for this sector in North America. Like the worldwide average, unfortunately, bus/coach tours are way down the list of priorities. Again, this will be for a few reasons, one being the thought of sitting inside a vehicle with complete strangers and the health and safety aspects of that. Remember, however, that the preference for travellers is self-guided or private tours, so taking their own transport or hiring a vehicle for their own use will be more attractive. That's great news for RV and motorhome providers.

I am not surprised to see food and drink tours high on the list, as this is a great way to bring people together, and it was a growing market pre-covid. Museum tours are also high on the list in North America, which is great for those who offer this type of product.

For those who said 'other', there was a clear trend of wanting to visit family and friends. As you can imagine this is very important to a lot of people, so creating products that cater for family get-togethers may be an option for some.

Some of the 'Other' entries entered in our research....

- Anything With My Best Friend
- Beach
- Disney World
- Relaxing Trips
- Sports Events
- Tropical Vacation
- Visiting Friends & Family

Question Nine

If you could travel to any country by the end of 2021, which country would that be?

Top Ten Destinations

tma. tourism marketing agency

This was an open-ended question to help get a feel of the consumer's desired destination if given the choice to travel to any country or region. It's handy for those who attract international customers and interesting to see the differences based on the region of survey responses.

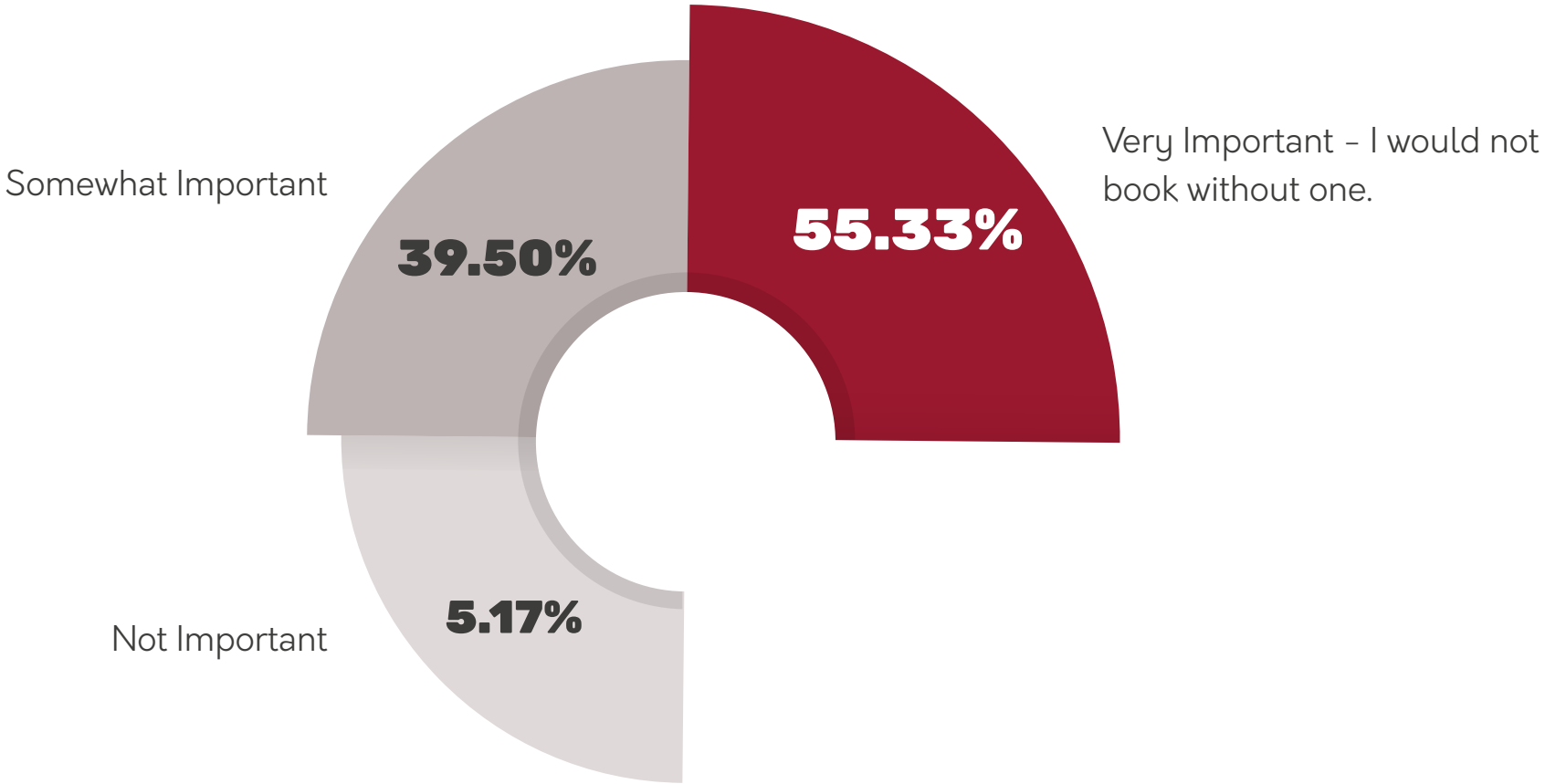
Despite it being one of the worst affected destinations during the pandemic, Italy was the most desired destination in our global results and also with our North American travellers, which is very encouraging for those operating in Italy. Australia was a close second and with Japan, Canada and France making it into the top five. Ireland and England — both traditionally-popular destinations for North Americans — were in the top 10, which is promising for those destinations when international borders open up and North Americans gain more confidence taking long-haul journeys again.

While this list does not show destinations that North Americans can travel to currently, it does provide some insights into travellers' desired destinations that can help inform your marketing. Targeting specific travellers to book for later in 2021, 2022, or 2023, depending on the vaccination rollout as highlighted in the map, may be an option for some of you.

If you are in Italy, for example, targeting those within North America for a week-long break with a private or self-guided product may be what attracts a good majority of this demographic.

Question Ten

How important is a Covid Guarantee Policy in your booking decisions? (for example, a policy that allows you to move dates or offer full/partial refunds etc)



tma. tourism marketing agency

With this question, I wanted to highlight how important it will be for your business to have a Covid Guarantee Policy or some form of flexible terms.

The numbers speak for themselves: 55.33% of travellers will not even book with a company if they do not have one. That is a huge number and is why I urge you to make sure you have flexible terms displayed prominently on your website and in your marketing materials.

Another 39.5% said it was somewhat important, so this will still be massively important to those more willing to book. A policy is more likely to persuade them over someone who does not offer one. This is a combined 94.83% of travellers who would expect some form of flexibility when booking a travel-related product.

You must provide flexible booking terms to give consumers confidence in your business. By not providing flexible terms, you're giving the impression that you do not care about their fears.

If you are a multi-day operator, think about allowing travellers to pay a small deposit with the rest payable 30 days before the start date, or even a subscription over a period of time to help generate regular income for you and your business. Allow the traveller the ability to easily change dates as many times as necessary.

For day-tour operators, why not offer to reserve a spot for free, or 50% upfront and the rest 24 hours prior to start date. Again, allow them to easily change dates as many times as necessary.

Even when covid is a distant memory, travellers will not go back to how it was. They will expect and demand the same treatment, so more flexible terms are here to stay. Bear that in mind for the future of your business and marketing strategies.

We shall now highlight key audience demographics of those who participated in this research.

Careers

Other	17.67%
Healthcare and Social Assistance	12.67%
Finance and Insurance	7.83%
Education	7.67%
Information - Services and Data	7.00%
Software	5.67%
Arts, Entertainment, or Recreation	3.83%
Government and Public Administration	3.83%
Information - Other	3.17%
Hotel and Food Services	3.00%
Manufacturing - Other	3.00%
Scientific or Technical Services	2.83%
Transportation and Warehousing	2.67%
Homemaker	2.67%
Construction	2.33%
Legal Services	2.00%
Retail	1.50%
Automotive	1.17%
Personal Services	1.17%
Manufacturing - Computer and Electronics	1.00%
Real Estate, Rental, or Leasing	0.83%
Telecommunications	0.83%
Advertising	0.67%
Agriculture, Forestry, Fishing, or Hunting	0.67%
Shipping/Distribution	0.50%
Religious	0.50%
Market Research	0.50%
Energy/Utilities/Oil and Gas	0.33%
Fashion/Apparel	0.33%
Marketing/Sales	0.33%
Consulting	0.33%
Wholesale	0.33%
Security	0.17%
Broadcasting	0.17%
retired	0.17%
Military	0.17%
Human Resources	0.17%
Processing	0.17%
student	0.17%

Business/Job Role

Prefer not to say	18.00%
Middle Management	12.50%
Owner or Partner	9.17%
Senior Management	7.33%
Administrative/Clerical	6.33%
Technical Staff	5.83%
Director	4.33%
Supervisor	3.17%
HR Manager	2.33%
Sales Staff	1.83%
President/CEO/Chairperson	1.67%
C-level executive	1.67%
Chief Financial Officer (CFO)	1.17%
Project Management	1.17%
not_work	0.83%
Business Administrator	0.67%
Buyer/Purchasing Agent	0.67%
Product Manager	0.67%
Craftsman	0.67%
Chief Technical Officer (CTO)	0.33%
Foreman	0.33%
Supply Manager	0.33%

Education

Post-graduate	38%
University	33%
High School	19.50%
Vocational/Technical Collage	8.50%
Middle School	1%

Employment Status

Employed for wages	62.00%
Self-employed	11.50%
Retired	5.83%
Homemaker	5.17%
Student	4.33%
Out of work and looking for work	3.67%
Other	2.83%
Unable to work	2.50%
Out of work but not currently looking for work	1.83%
Military	0.33%

Household Income

$150,000 or more	21.83%
Between $25,000 and $49,999	14.83%
Between $75,000 and $99,999	13.67%
Between $50,000 and $74,999	11.83%
Between $100,000 and $124,999	10.83%
Under $25,000	10.83%
Between $125,000 and $149,999	8.50%
Prefer not to say	7.67%

Marital Status

Married	54.83%
Single	23.83%
Living with partner	12.50%
Divorced	4.00%
Separated	2.50%
Prefer not to say	1.17%
Widowed	1.17%

Number of Children

Two	27.17%
None	40.67%
One	17.33%
Three	7.00%
Four	3.83%
Prefer not to say	2.17%
Six or more	1.00%
Five	0.83%

UK & Ireland Consumer Mindset & Intent

We will now break down the statistics, highlighting results from Ireland and the UK specifically. Starting with the key takeaways to compare this market to the global results, this section offers insights into region-specific trends for 2021 and beyond

Destinations: UK & Ireland
Age Groups: 18-54+
Gender: Male & Female

tma. tourism marketing agency

Key Takeaways

Globally, 38% of respondents will only travel domestically as soon as it's allowed, while a small majority of respondents (41%) say they will travel internationally as soon as it's allowed. This question was posed with the opportunity to wait until vaccinations were prevalent before traveling at all. By including the potential for vaccinations to alter travel booking decisions, we can compare this data with a later question that removes the vaccination factor altogether.

Only 26% of respondents from Ireland and the UK will travel domestically, while 46% plan to travel internationally as soon as it's allowed. Interestingly, respondents from this group were, overall, the most concerned about vaccinations being prevalent before they travel. 28% of respondents said they would not travel, even if restrictions were lifted, until vaccinations were prevalent.

Takeaway: If you are trying to attract British and Irish tourists to your international destination, anything you can do to promote your own country's fast and efficient vaccine rollout will help you convince them to travel to your destination.

Globally, 55% of respondents are most attracted to local/domestic travel if restrictions are all lifted in 2021. Only 17% of respondents are interested in a long-haul trip.

Respondents from the UK and Ireland showed an even split between wanting to stay local/domestic and wanting to travel short-haul (1-4 hours), with 41% for each. This was the greatest aberration among all demographics and interesting given the UK and Ireland group's concern regarding the prevalence of vaccinations before traveling.

Takeaway: British and Irish tourists are more interested in leaving their own countries than any other group. Operators outside of the UK and Ireland should be pleased to hear this and continue to market to these

audiences, especially those in Europe that can be considered short-haul destinations.

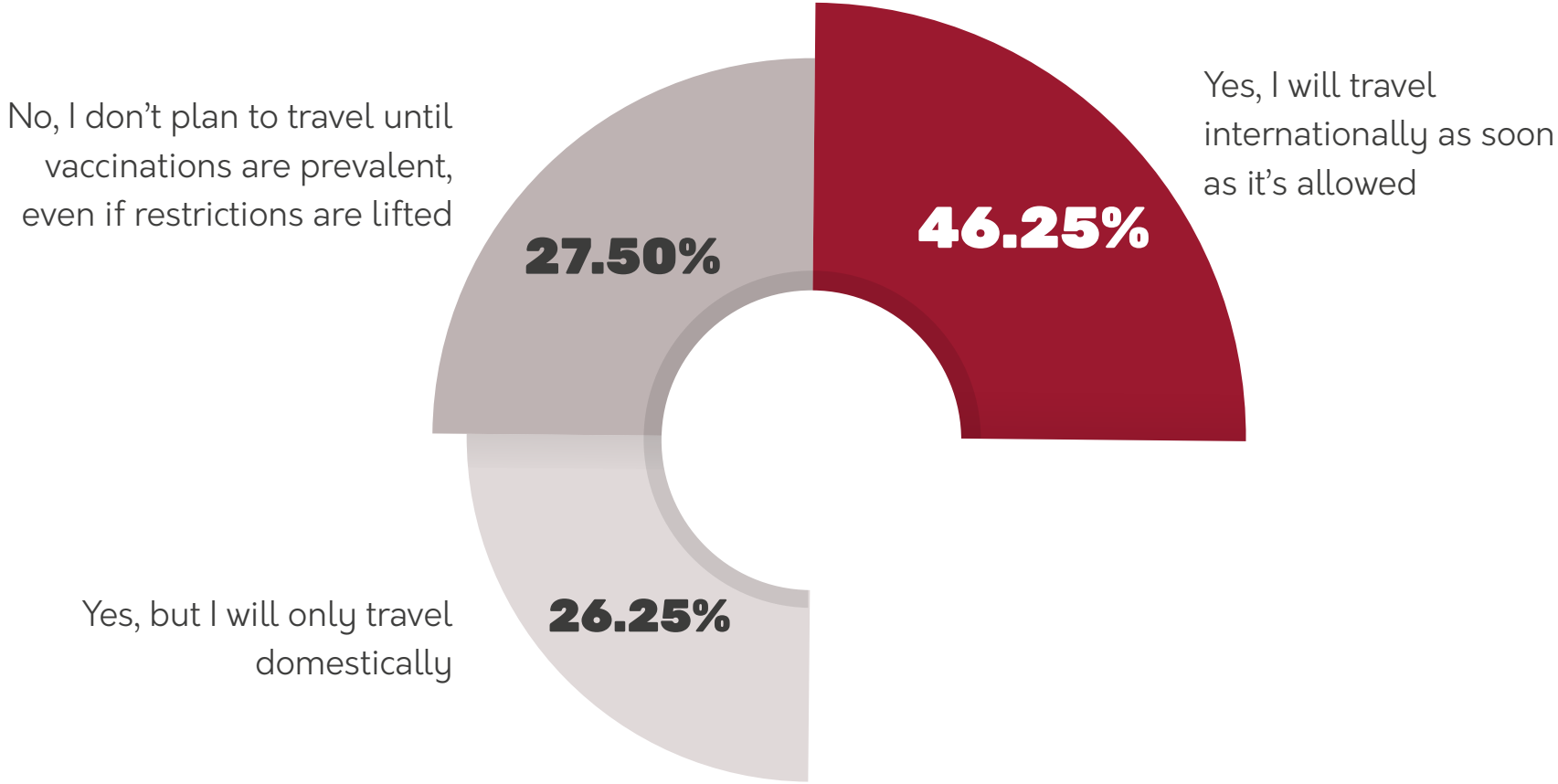
Globally, 12% of respondents say they don't have time to research and plan their travels, so they would be willing to pay more to have that handled for them.

Respondents from the UK and Ireland were the most likely to say they couldn't afford that extra service, at 18%.

Takeaway: Offering a bespoke or travel-planning service will likely be less effective for British and Irish tourists than other demographics. Self-guided tours that can be offered at low costs could be appealing, however.

Question One

Do you plan to take a trip/holiday as soon as any travel restrictions are lifted?



tma. tourism marketing agency

Focusing on the UK and Ireland markets, we can see that a combined 72.5% wish to travel as soon as they can. Interestingly, 46.25% in this market say they will travel internationally as soon as it's allowed, which reflects this market's option for short-haul international travel (unlike North America or Oceania).

Higher than all other destinations we are focusing on in this report, 27.50% of those in Ireland and the UK say they will not even travel until vaccinations are more prevalent. This is potentially a large chunk of the population that operators — foreign and domestic — may lose out on.

So what does this mean for the UK & Ireland marketing strategies?

Those operators in other countries who target and rely on the UK and Irish markets, you have to take into account that more than half of your intended market may not wish to travel internationally yet. For those operators based in the UK or Ireland who cater more for a domestic market, this is great news as it makes for a strong market and goes along the lines of what I have been advising our customers locally.

If you can, have two strategies: one to focus on domestic travellers as this will be what opens up first, and another to target international travellers wishing to visit the UK or Ireland. If you are a destination close to the UK, like the popular destination of Spain (number one for this market's dream list), then aim for mid-late 2021 before travellers from the UK and Ireland can visit once again.

Question Two

In regards to booking a trip, how fearful are you about each of the following?

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Catching Covid-19	8.75%	20%	41.50%	29.75%
Losing my deposit	15.50%	14.25%	43.50%	26.75%
Not having the ability to change my journey date	14%	21%	40.75%	24.25%

tma. tourism marketing agency

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Quarantine at both ends of the journey	14.25%	16.25%	32%	37.50%
Fear that the company may go out of business	15%	17.50%	40.75%	26.75%

Like everywhere else at the start of this pandemic, qualitative insights showed us that the main fear for travellers was the thought of losing their deposits and money booked on trips. This, and not having the ability to change dates without repercussion was high on their minds.

While those are still very important factors for travellers, catching COVID-19, going into quarantine, and the fear that they may book a trip for that business to stop trading has grown. This is understandable as we know more about this virus than we did back in March 2020.

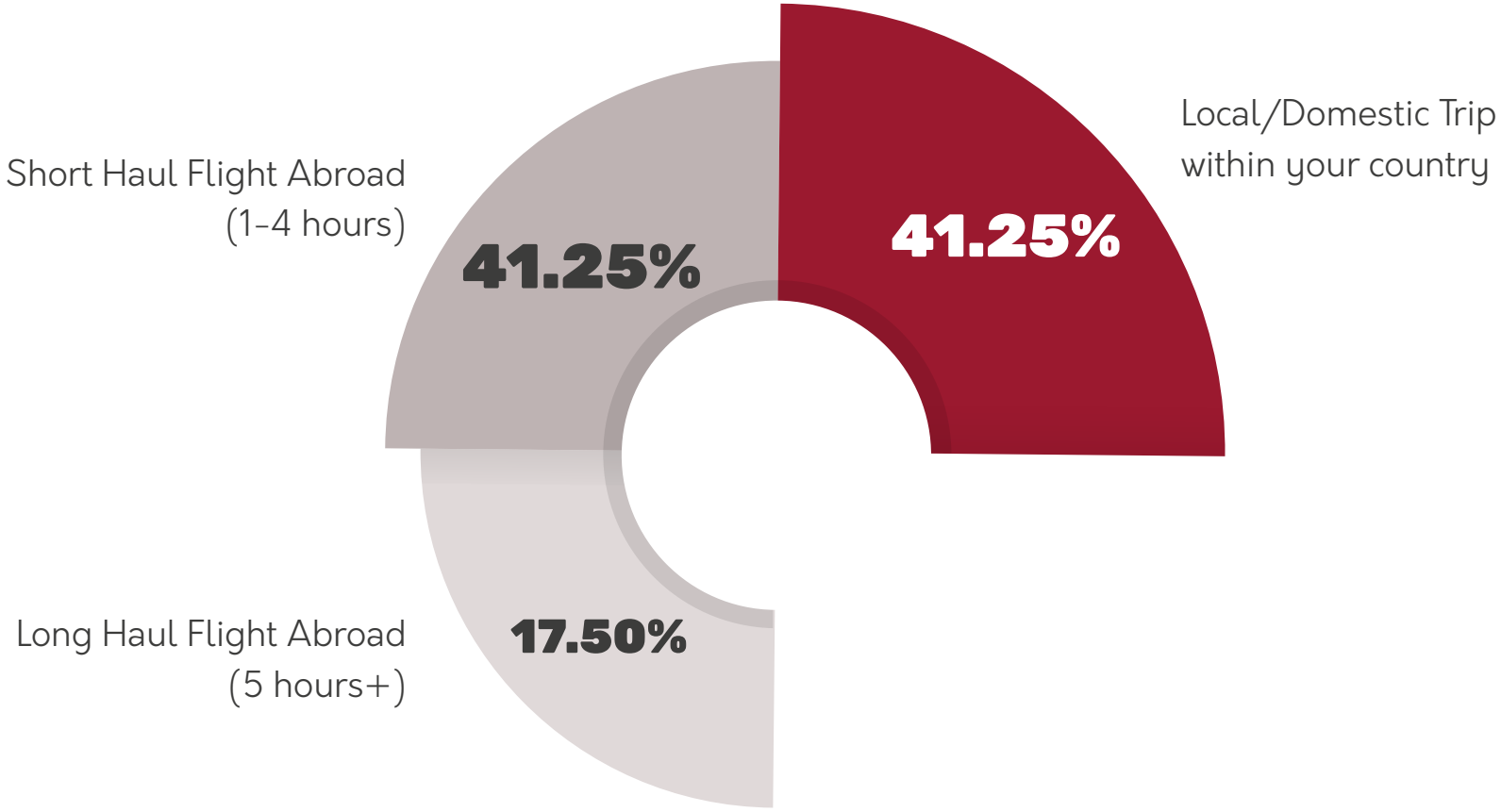
Remember that 72.50% of people in the UK and Ireland still wish to travel, more so internationally. But over 70% say that losing their deposit makes them somewhat or very afraid to book travel; this is a much higher percentage than any other region.

It is imperative that you have flexible terms, especially if you are targeting the British and Irish market. These travellers are more concerned about losing their deposit than they are about quarantine, which is the top concern for every other market in this survey. Flexible policies will offer encouragement as this market ventures out again.

Travellers from the UK and Ireland were, overall, much more fearful about all aspects of booking travel right now than any other demographic.

Question Three

If travel restrictions are lifted in 2021, what type of trips/holidays appeal most to you?



tma. tourism marketing agency

Again, asking those surveyed what type of trip appeals to them the most in 2021, it is a complete split between local/domestic and short-haul travel, with both sitting at 41.25%. This highlights that a local and domestic strategy will be key for the survival of many tour and activity providers within this destination, while those international businesses who target the UK and Ireland still have an opportunity here.

Local and domestic travel has grown in popularity due to the pandemic, but it is encouraging to see that many still wish to travel abroad in 2021, if and when we are allowed to. Spain, Portugal, France, Greece, Iceland and other parts of Europe will be prime destinations for British and Irish tourists.

With only 17.5% considering a long-haul journey, if you are a destination that relies heavily on this market, we cannot expect 2021 travel to go back to 2019 levels. It will improve from the current situation, but growth will be slower, so aim for this picking up more in 2022, all going well.

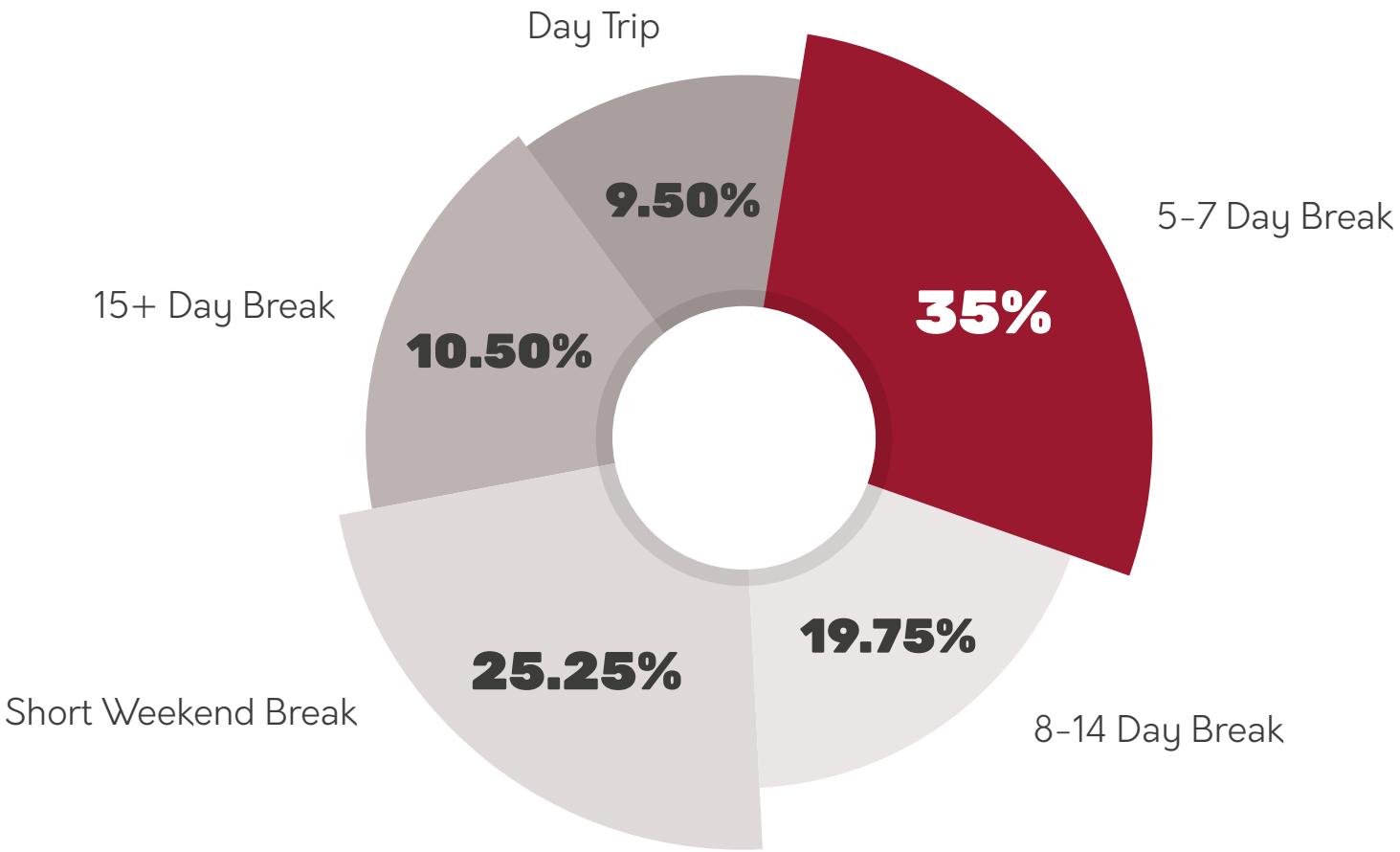
From the UK and Ireland, travellers are in a prime location for travelling to Europe and, normally, enjoy cheap flights to get there. Look at the vaccination map to get a rough idea of which European countries people from the UK and Ireland can travel to in 2021 and beyond. Although keep in mind that vaccination rollout won't provide the complete picture.

Travelling to North America, which is typically a strong market, may be harder as the figures suggest travellers are less inclined to travel that far in 2021, so operators there should focus on 2022 and beyond.

It's important to note, however, that the UK and Ireland market was the most likely to say they would travel internationally, with 58.75% of travellers saying they would cross borders if restrictions are lifted this year. Only this market and the European market had a majority choosing international travel.

Question Four

When Covid is no longer a concern, how long will your first trip/holiday be?



tma. tourism marketing agency

So we have established that the majority of travellers would be split between local/domestic and short haul travel in 2021, but how long would they travel for?

Going by these figures, a combined 60.25% of UK and Irish travellers would prefer short weekends or week-long breaks. Note, however, that at 19.75%, 8- to 14-day breaks are more appealing to British and Irish tourists than those from any other market. With more vacation time available to them and many workers having rolled over unused 2020 holidays, we could see much longer breaks with 2021 and 2022 travel bookings.

The shorter breaks are very important for those of you who are day-tour operators or provide an attraction as travellers' time will be more limited. Remember, you are not competing against other operators per se, but you are competing for someone's time. A traveller can decide to go out for a meal, visit a museum, meet friends, take in a show, or a host of other forms of entertainment that your product is competing against. Operators are in the entertainment business, so it is other forms of entertainment you are competing with.

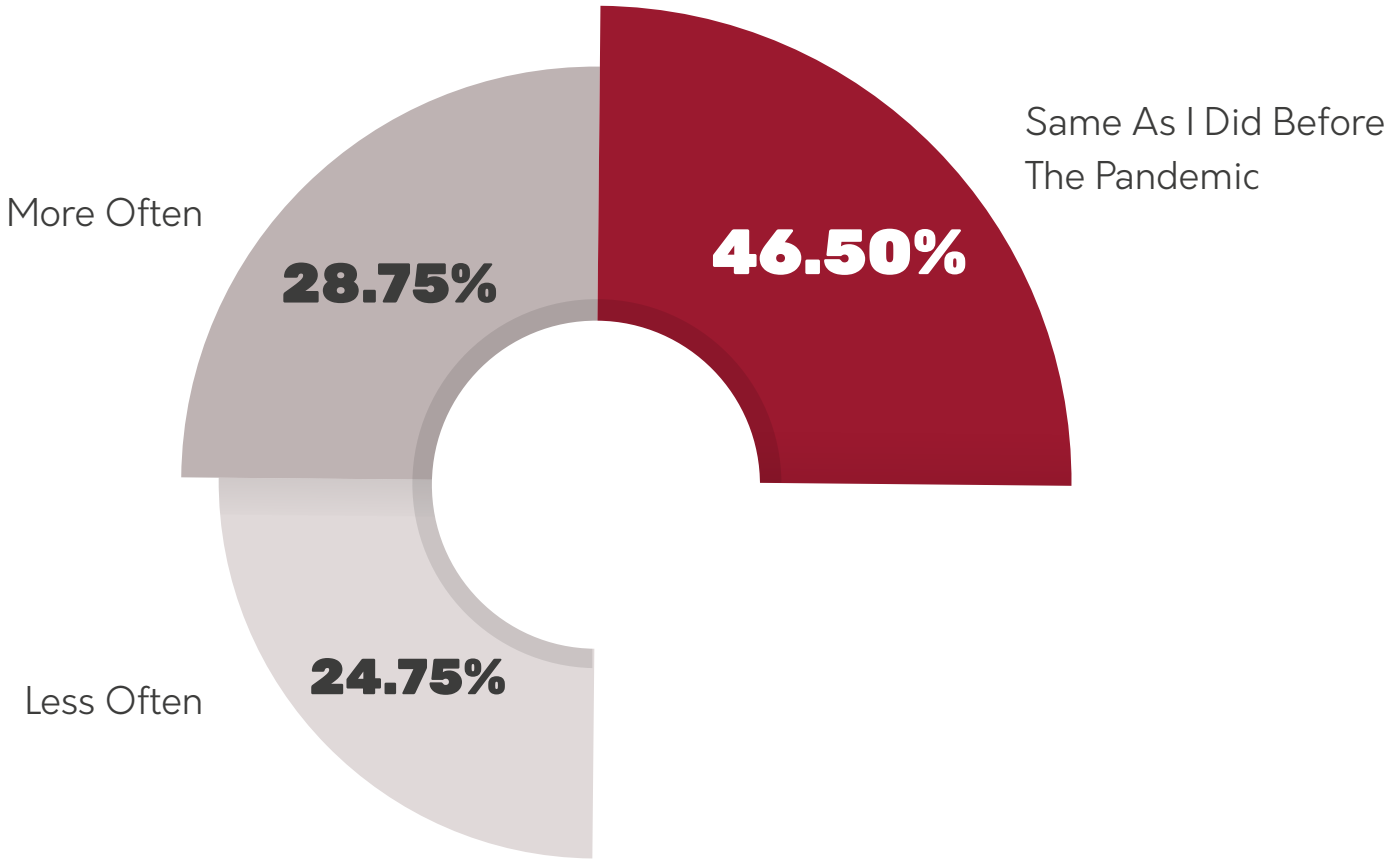
For operators in the UK and Ireland looking to target international customers, look at those destinations close by, as the usually-strong North American market, along with parts of the world, will either be unable or less willing to travel that far a distance. Likewise for those who target the UK and Ireland from international destinations.

When marketing your product, keep in mind that those visiting your destination may have limited time, so 1- or 2-hour day tours may be advisable. A day-long tour may be harder to sell, especially if they are only visiting for three days. This will not be the case for those who do travel for 8-14 days, of course.

If you happen to run and own an Airbnb or other form of accommodation, then you are in a strong position for this market in 2021. Hiring vehicles, campervans, and motorhomes will also explode in demand in 2021.

Question Five

Post-Covid, do you intend to travel internationally...



tma. tourism marketing agency

With this question we wanted to see if being in lockdown and experiencing restrictions for the last year have driven people to desire international travel more or less than before.

Interestingly, a high percentage (28.75%) said they do wish to travel more, which is great news for those who target this demographic. A further 46.50% said they would travel around the same as they did before. However, 24.75% said they would travel internationally less often, and this was higher than expected.

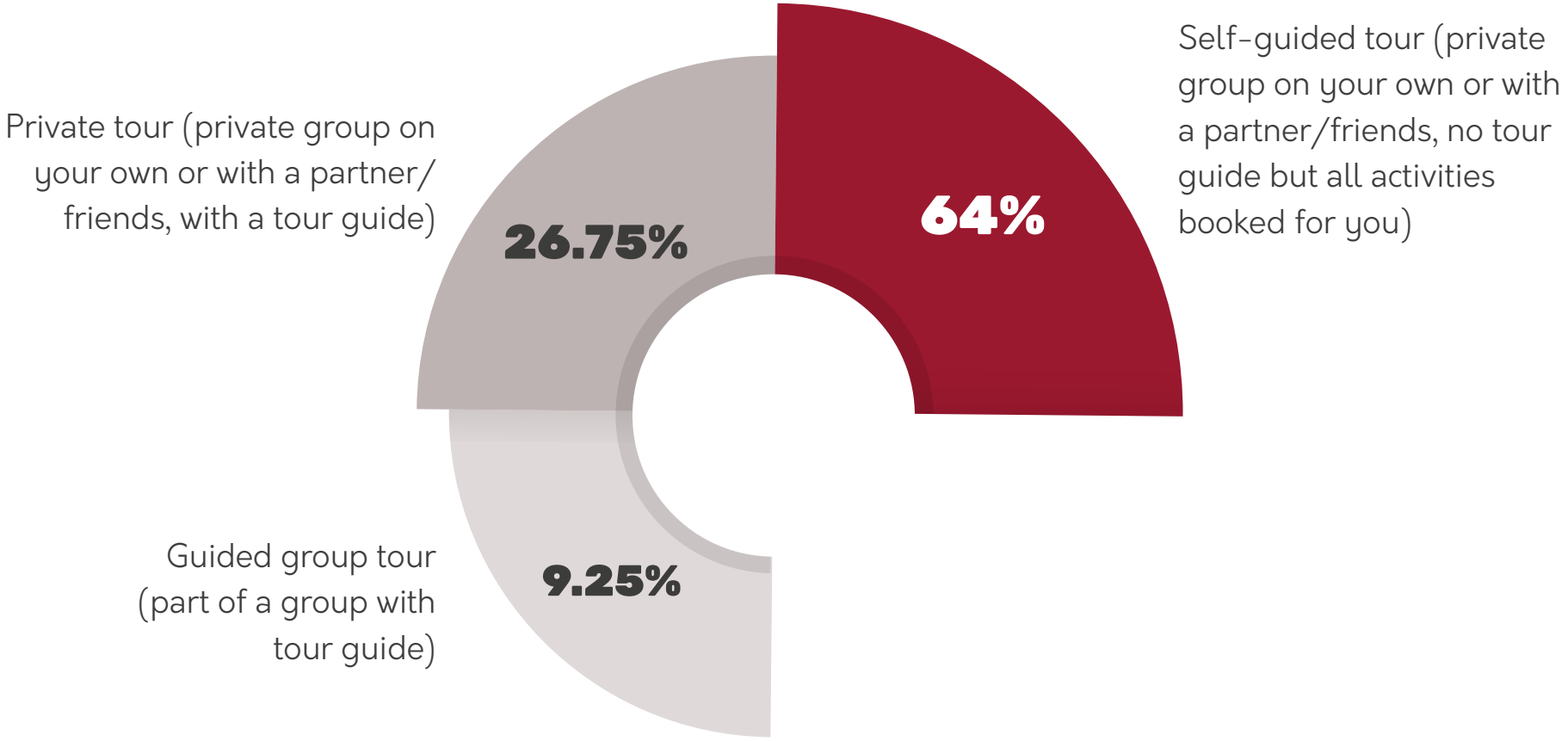
There are many factors at play here as travellers consider decreasing their international travel. For some, financial concerns after a challenging year will limit big trips; others will still be wary of the virus until vaccinations are fully rolled out. Some will simply feel that travel has contributed to the situation we are in or that our planet is a little 'healthier' because of the reduced travel.

However, a combined 75.25% of those asked do wish to travel internationally when they can, some more than others. This provides many opportunities for operators and activity providers to capture this market.

Again, take into account the previous question on the length of travel: 46.50% of people wish to travel more internationally, but this will more likely be more short weekend breaks or week-long breaks, they may just do more of them.

Question Six

When travelling in 2021, what types of tours or activities appeal to you most?



tma. tourism marketing agency

This was one question that I was most interested in seeing responses. Would the pandemic change the types of products that travellers would wish to purchase?

In 2019, at the height of tours and activities, self-guided tours was the biggest-growing sector at that time, and that was before the pandemic. That trend is only going to be intensified in 2021 and beyond because travellers will be looking for a more intimate, private experience, partly due to safety concerns.

From those we surveyed in the UK and Ireland, a massive 64% would prefer to participate in a self-guided tour with their friends/family and no tour guide. This is higher than most markets surveyed. Equally impressive is 26.75% wish a private tour with their own tour guide. What may be worrying for some, is that only 9.25% would take a guided group tour.

Going by these figures, a private and self-guided option may be imperative for tour and activity businesses in the UK and Ireland or those targeting Irish and British inbound tourists.

We have a number of our own clients who have or are in the process of developing alternative options of their products to cater for this market. In fact, I would encourage any operator to provide a self-guided option as this can provide a passive income. Think about it: you can offer the same product as you currently provide, at a cheaper price, but without the expense of a tour guide, giving you a bigger profit margin.

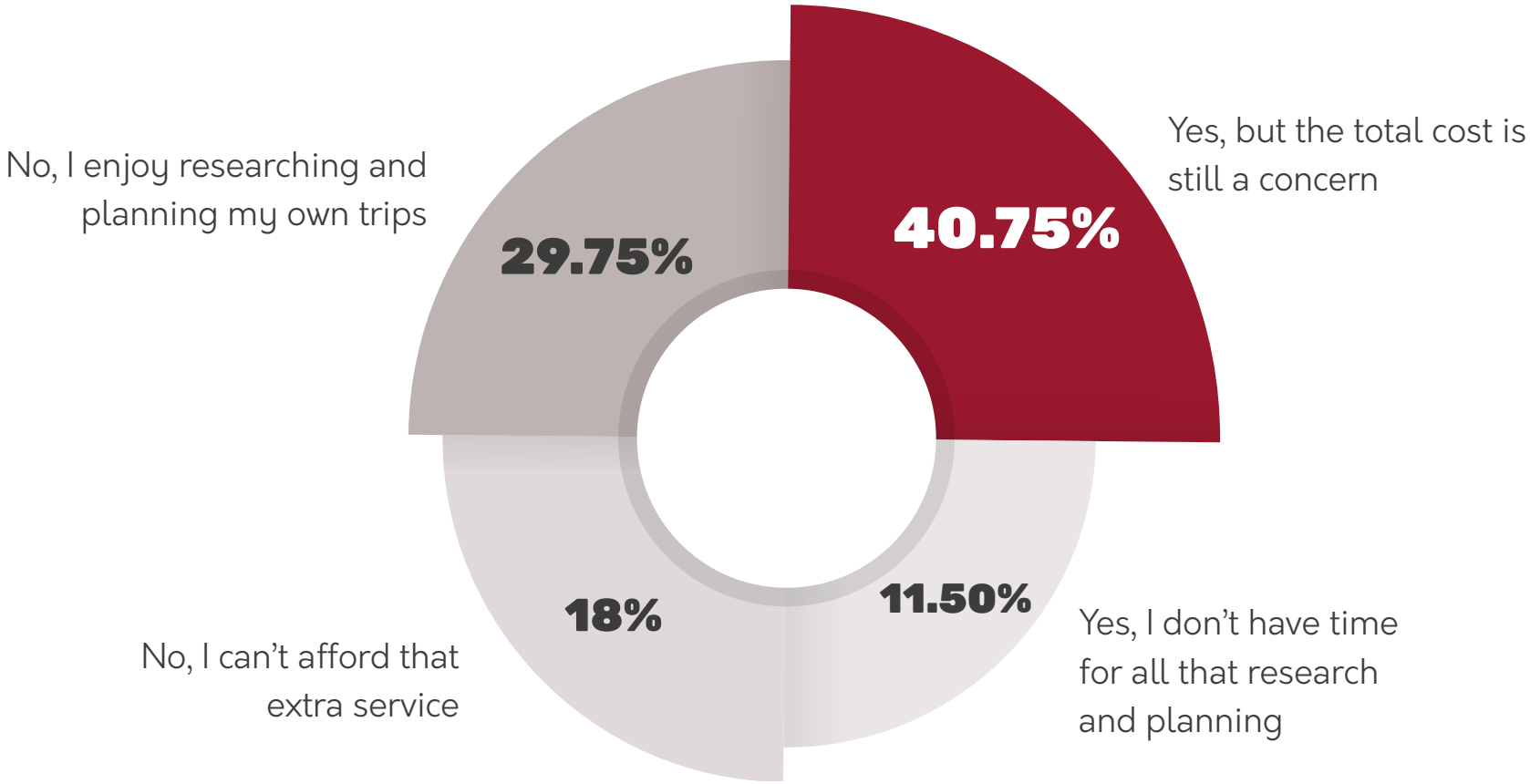
For multi-day providers, you organise every aspect for your customer, booking accommodation, tickets to attractions, transportation, etc, like you normally do, but let your customer take themselves along that journey. You can provide a travel guide to accompany them, or speak to businesses like Clio Muse or Autoura to create an audio or AI guide that can accompany them. One of our clients, Overland Ireland, have even created their own app for their self-drive option.

Day tour companies can also provide self-guided options using these apps and platforms to create a passive income. For me, this is more of a realistic option than the time and effort of creating virtual tours.

And no, this does not mean you are sacrificing your business and consumers will all of a sudden stop taking in-person tours. That will still be a big market. A great experience with a self-guided tour may convince some to try a guided tour further down the line. But, in any case, if both are generating you revenue and — more importantly — a profit, then it's a win-win.

Question Seven

Would you pay more to have everything booked and organised for your trip?



tma. tourism marketing agency

If self-guided and private tours are the most desired by UK and Irish travellers, would they pay more to have everything organised for them?

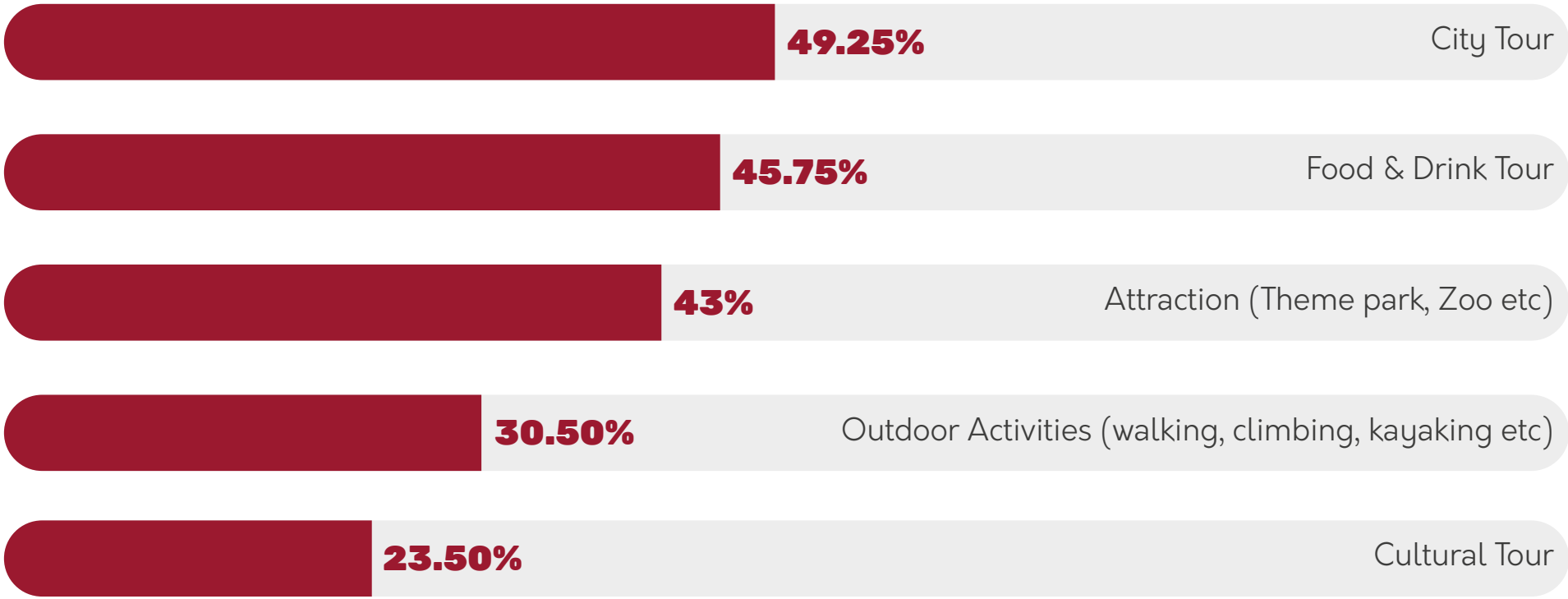
Going by the figures, a combined 52.25% of those asked would pay more, with 11.50% saying they simply don't have the time to do it themselves and 40.75% saying they would but the total cost would still be a concern. This highlights that more than half would prefer to have everything organised for them and pay for the privilege, as long as the increase in the cost is not absurd.

Have a think about what has happened over the last 12 months. We have all been 'stuck' in limbo and a good majority of travellers would pay a premium just to experience 'something' again. That £120 day tour that might have put someone off before may seem more attractive now as people will just say 'screw it, I want to have some fun again'. Play on this aspect in your marketing and, whatever you do, do not reduce your prices! I know some disagree with me on this but I feel travellers will pay a little more than the normal asking price just so they can experience something again.

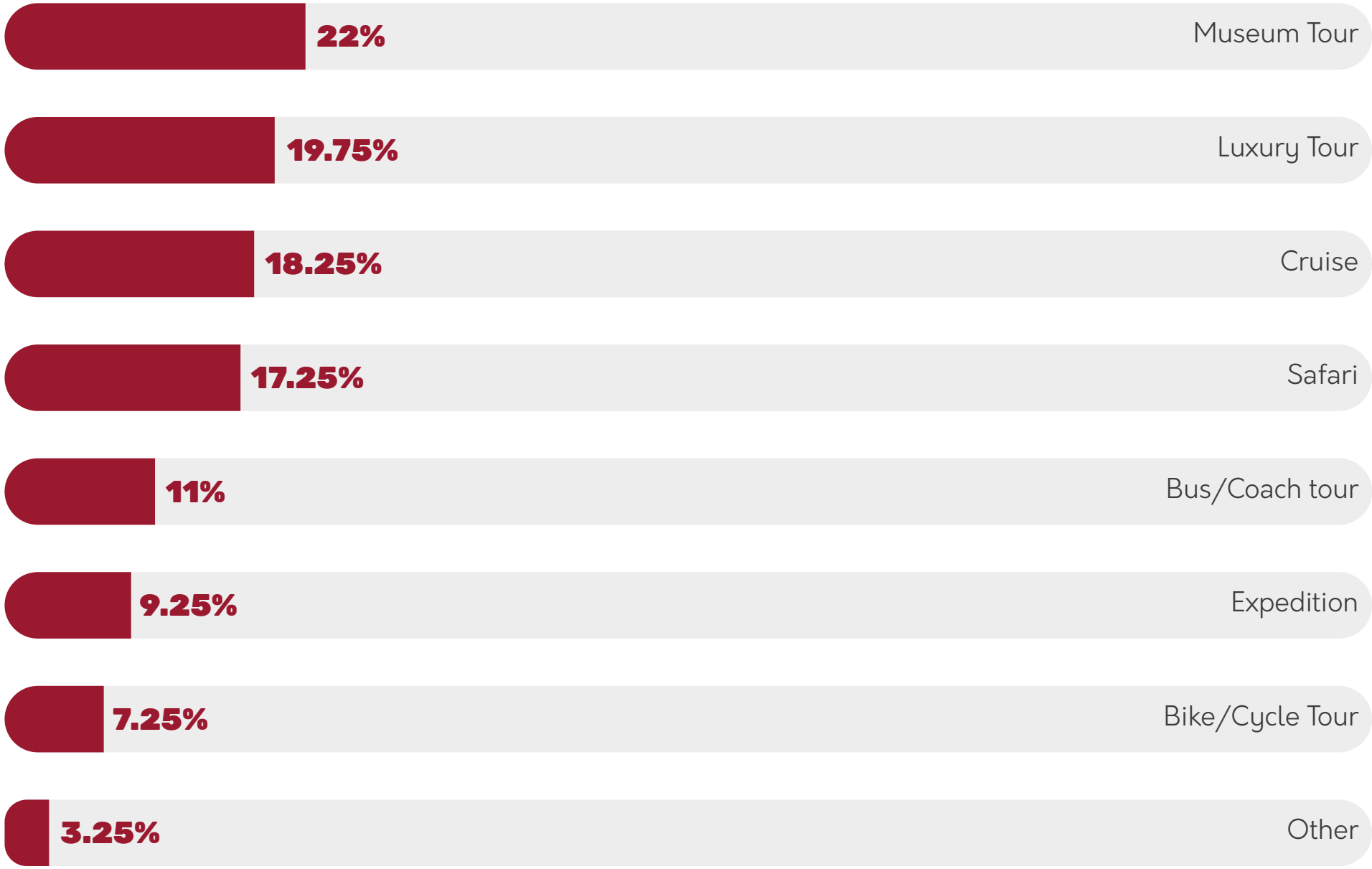
Do, however, take into account that a combined 47.75% still prefer to research and do all the organising themselves, or simply can't afford to pay more. In fact, travellers from the UK and Ireland were the most likely to say they could not afford that type of service. This is why it is very important to have private, self-guided, and guided options on your tours at varying prices and varying number of hours/days to meet each type of traveller.

Question Eight

Which tour or activity are you most looking forward to once travel opportunities are available again? (select your top 3)



tma. tourism marketing agency


22%
Museum Tour
19.75%
Luxury Tour
18.25%
Cruise
17.25%
Safari
11%
Bus/Coach tour
9.25%
Expedition
7.25%
Bike/Cycle Tour
3.25%
Other

So we have established that most travellers are looking for local/domestic travel, short weekend or week-long breaks, and self-guided tours, but what type of tours are they interested in? We asked for their top three.

Overall, city tours are the most desired for the UK and Ireland, closely followed by food and drink, and then attractions, and outdoor activities.

What I do find very interesting is that, despite the bad press of late, cruises are much higher than expected, which is encouraging for this sector in the UK and Ireland. This will be especially important for the over 60s market.

Like the worldwide average, unfortunately bus/coach tours are way down the list of priorities for the UK and Ireland market. Again, this will be for a few reasons, one being the thought of sitting inside a vehicle with complete strangers and the health and safety aspects of that. Remember, however, that the preference for travellers is self-guided or private tours, so taking their own transport or hiring a vehicle for their own use will be more attractive. That's great news for campervan and motorhome providers.

I am not surprised that food and drink tours are high on the list as this is a great way to bring people together, and it was a growing market pre-covid. Outdoor activities are also high on the list which the UK and Ireland have in abundance, so this was expected.

For those who said 'other', there was a clear trend of wanting to visit family and friends. As you can imagine this is very important to a lot of people so creating products that cater for family get-togethers may be an option for some.

Some of the 'Other' entries entered in our research....

- Beach Holiday
- Business
- Caravan
- Quiet Holiday
- Relaxation

Question Nine

If you could travel to any country by the end of 2021, which country would that be?

Top Ten Destinations

tma. tourism marketing agency

This was an open-ended question to help get a feel of the consumer's desired destination if given the choice to travel to any country or region. It's handy for those who attract international customers and interesting to see the differences based on the region of survey responses.

For travellers from the UK and Ireland, Spain was unsurprisingly the most desired destination, which is very encouraging for those operating in Spain. British and Irish travellers love a trip to Spain, be it for the beach, a city tour, or to play golf. The USA is also a close second but, going by the previous statistics, they may have a desire to go there in 2021 but are not willing to book at this stage.

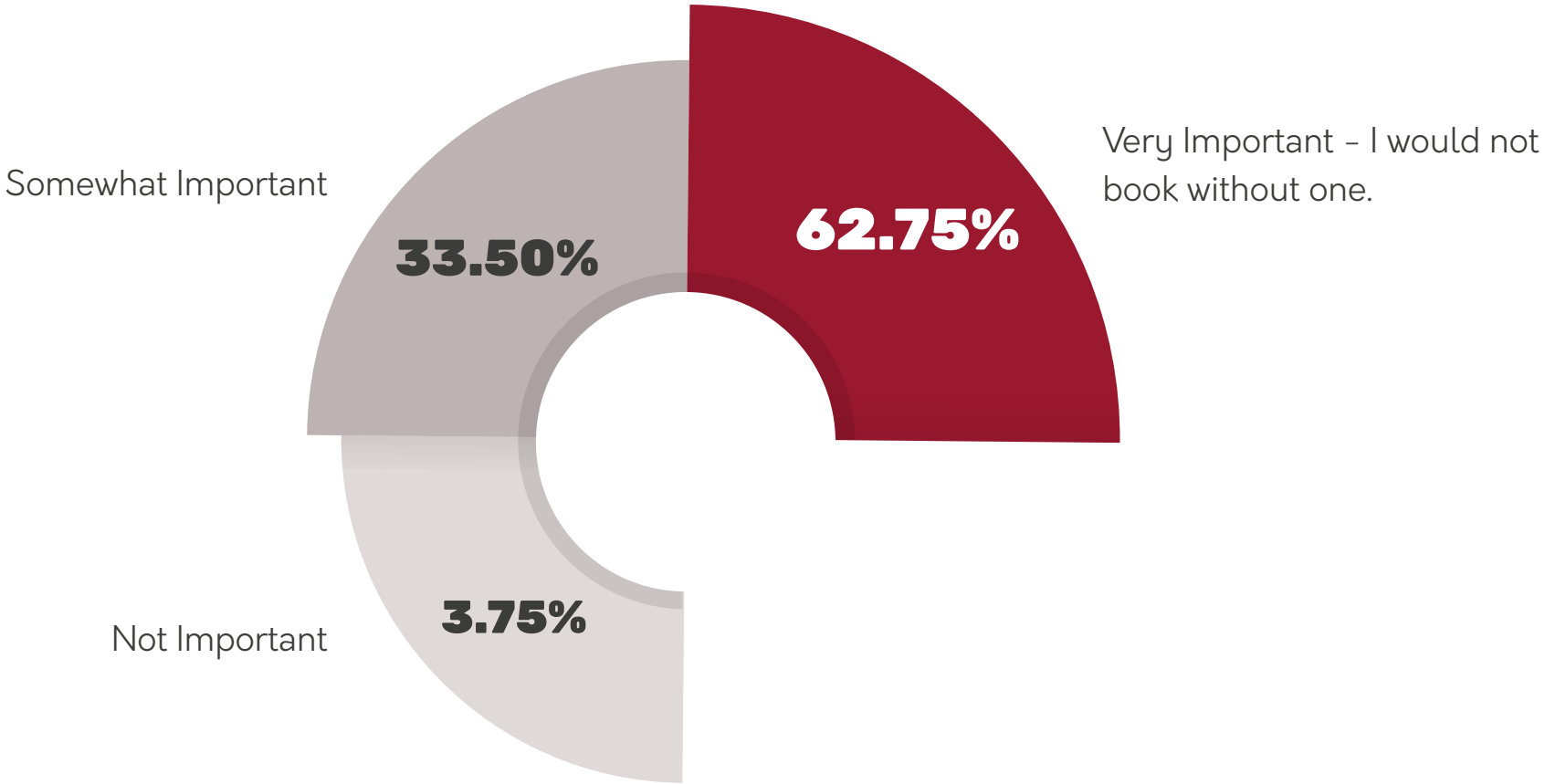
France, Greece and Italy are always popular destinations for Irish and British travellers, so it's not surprising to see them round out the top five.

While this list does not show destinations that those from the UK or Ireland can travel to currently, it does provide some insights into travellers' desired destinations that can help inform your marketing. Targeting specific travellers to book for later in 2021, 2022, or 2023, depending on the vaccination rollout as highlighted in the map, may be an option for some of you.

If you are in Greece, for example, you may want to target travellers in the UK or Ireland by focusing on a week-long break and offering a private or self-guided product.

Question Ten

How important is a Covid Guarantee Policy in your booking decisions? (for example, a policy that allows you to move dates or offer full/partial refunds etc)



tma. tourism marketing agency

With this question I wanted to highlight how important it will be for your business to have a Covid Guarantee Policy or some form of flexible terms.

The numbers speak for themselves. Higher than all other markets surveyed, 62.75% of travellers from the UK and Ireland will not even book with a company if they do not have one. That is a huge number and it's why I urge you to make sure you have flexible terms displayed prominently on your website and in your marketing materials.

A further 33.50% said it is somewhat important, so will still be massively important to those who are more willing to book. Having a policy is more likely to persuade them to book with you over someone who does not offer one. Not only that, this is a combined 96.25% of travellers who would expect some form of flexibility when booking a travel-related product.

You must provide flexible booking terms to give consumers confidence in your business. By not providing flexible terms, you're giving the impression that you do not care about their fears.

If you are a multi-day operator, think about allowing travellers to pay a small deposit with the rest payable 30 days before the start date, or even a subscription over a period of time to help generate regular income for you and your business. Allow the traveller the ability to easily change dates as many times as necessary.

For day-tour operators, why not offer to reserve a spot for free, or 50% upfront and the rest 24 hours prior to start date. Again, allow them to easily change dates as many times as necessary.

Even when Covid is a distant memory, travellers will not go back to how it was. They will expect and demand the same treatment, so more flexible terms are here to stay. Bear that in mind for the future of your business and marketing strategies.

We shall now highlight key audience demographics of those who participated in this research.

Careers

Other	24.25%
Healthcare and Social Assistance	9.50%
Retail	9.25%
Education	6.50%
Homemaker	6.00%
Finance and Insurance	5.75%
Hotel and Food Services	4.75%
Information - Services and Data	3.50%
Manufacturing - Other	3.50%
Government and Public Administration	3.50%
Arts, Entertainment, or Recreation	3.25%
Construction	3.00%
Legal Services	1.75%
Transportation and Warehousing	1.50%
Software	1.25%
Human Resources	1.25%
student	1.25%
Scientific or Technical Services	1.00%
Marketing/Sales	1.00%
Shipping/Distribution	1.00%
Energy/Utilities/Oil and Gas	0.75%
Information - Other	0.75%
Personal Services	0.75%
Wholesale	0.75%
Broadcasting	0.50%
Real Estate, Rental, or Leasing	0.50%
retired	0.50%
Military	0.50%
Consulting	0.50%
Security	0.25%
Manufacturing - Computer and Electronics	0.25%
Fashion/Apparel	0.25%
Publishing	0.25%
Agriculture, Forestry, Fishing, or Hunting	0.25%
Religious	0.25%
Market Research	0.25%

Business/Job Role

Prefer not to say	26.00%
Other non management staff	17.50%
Middle Management	10.00%
Owner or Partner	9.00%
Sales Staff	7.75%
Administrative/Clerical	7.25%
Supervisor	7.00%
Technical Staff	4.25%
President/CEO/Chairperson	1.75%
Senior Management	1.75%
HR Manager	1.50%
C-level executive	1.50%
Business Administrator	1.25%
Project Management	1.00%
Foreman	0.75%
Chief Financial Officer (CFO)	0.75%
Craftsman	0.50%
Buyer/Purchasing Agent	0.25%
Chief Technical Officer (CTO)	0.25%

Education

Vocational/Technical college	29.00%
High school	27.50%
University	23.00%
Post-graduate	11.00%
Middle school	9.50%

Employment Status

Employed for wages	53.25%
Student	11.00%
Out of work and looking for work	10.25%
Homemaker	8.75%
Self-employed	5.50%
Other	3.75%
Retired	3.50%
Unable to work	3.25%
Military	0.50%
Out of work but not currently looking for work	0.25%

Household Income UK

£18,500 - £49,999	37.11%
Under £12,500	22.89%
£12,500 - £18,499	13.16%
£50,000 - £62,499	12.11%
Prefer_not_to_say	7.63%
£62,500 - £99,999	4.74%
£100,000 - £124,000	1.84%
£125,000 and above	0.53%

Household Income Ireland

75,000€ - 124,000€	20.00%
15,000€ - 29,999€	20.00%
30,000€ - 44,999€	15.00%
45,000€ - 74,999€	15.00%
Under 15,000€	15.00%
Prefer_not_to_say	10.00%
125,000€ - €199,999	5.00%

Marital Status

Single	37.50%
Married	31.00%
Living with partner	21.50%
Divorced	5.75%
Prefer not to say	2.25%
Widowed	1.25%
Separated	0.75%

Number of Children

None	52.00%
One	21.25%
Two	18.00%
Three	4.75%
Four	1.75%
Five	1.25%
Prefer not to say	0.75%
Six or more	0.25%

Europe Consumer Mindset & Intent

We will now break down the statistics, highlighting six countries in Europe specifically. Starting with the key takeaways to compare this market to the global results, this section offers insights into region-specific trends for 2021 and beyond.

Destinations: France, Germany, Greece, Italy, Spain & Portugal
Age Groups: 18-54+
Gender: Male & Female

tma. tourism marketing agency

Key Takeaways

Globally, 38% of respondents will only travel domestically as soon as it's allowed, while a small majority of respondents (41%) say they will travel internationally as soon as it's allowed. This question was posed with the opportunity to wait until vaccinations were prevalent before traveling at all. By including the potential for vaccinations to alter travel booking decisions, we can compare this data with a later question that removes the vaccination factor altogether.

Only 30% of respondents in Europe say they will travel domestically, while 52% plan to travel internationally as soon as it's allowed (this is an obvious result of proximity and ease of border crossings, in comparison to Oceania and even North America)

Takeaway: These stats indicate that European tour operators can and should continue to target their marketing efforts at neighbouring countries.

Globally, 55% of respondents are most attracted to local/domestic travel if restrictions are all lifted in 2021. Only 17% of respondents are interested in a long-haul trip.

Only 46% of respondents in Europe want to travel domestically, although that was still the majority response of the three options. When combining the two options to travel internationally (short or long haul), 54% of Europeans are ready to cross borders.

Takeaway: While there is a slight leaning towards travelling internationally, it's still reasonably close to 50:50. This means that it's best for European operators to split their marketing efforts between domestic and international travel. You may also want to make sure that you have an even split of products that appeal to local and international demographics.

Globally, 44% of respondents say they will travel internationally about the same post-Covid as they

did before the pandemic.

Europeans were the only demographic with a majority intending to travel more often in a post-Covid world, with 43%.

Takeaway: While most travellers don't plan to change their travel habits from pre- to post-Covid, Europeans buck the norm. They are eager to get out and travel as soon and as often as possible, giving international operators who target this market great hope for the future.

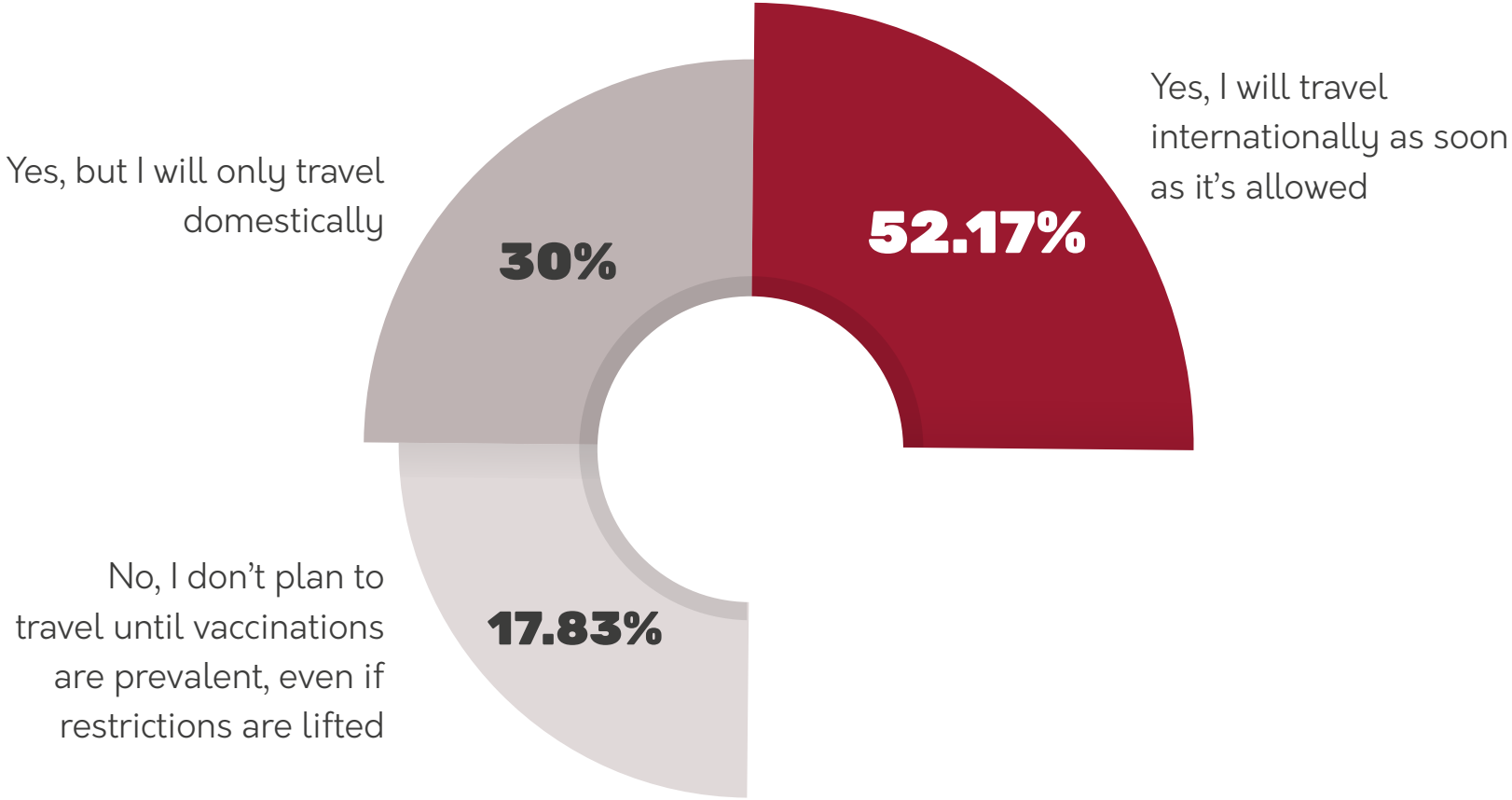
Globally, only 11% of respondents say a group guided tour is most appealing for 2021 travel.

Only 8% of Europeans found group guided tours to be appealing in 2021.

Takeaway: As fewer Europeans are interested in group guided tours, any tour companies who operate in Europe or target Europeans may like to alter current group tours, offering private or self-guided versions instead.

Question One

Do you plan to take a trip/holiday as soon as any travel restrictions are lifted?



tma. tourism marketing agency

Focusing on European markets, we can see that a combined 82.17% wish to travel as soon as they can, which is the exact same percentage as North American travellers eager to get back out there. However, just 30% of Europeans say they will only travel domestically, which is a lower percentage than any other demographic except the UK and Ireland. The ease and convenience of international travel for those two markets clearly sways travellers' decisions.

In Europe, 17.83% say they will not even travel until vaccinations are more prevalent; the same percentage as North Americans. This is potentially a large chunk of the population that operators — foreign and domestic — may lose out on.

There is a large divide between travellers wishing to travel internationally and those just considering domestic travel, with 52.17% wishing to travel to an international destination. Given the close proximity of other destinations in Europe, it is not surprising to see this figure as high as it is.

So what does this mean for the marketing strategies of European based operators?

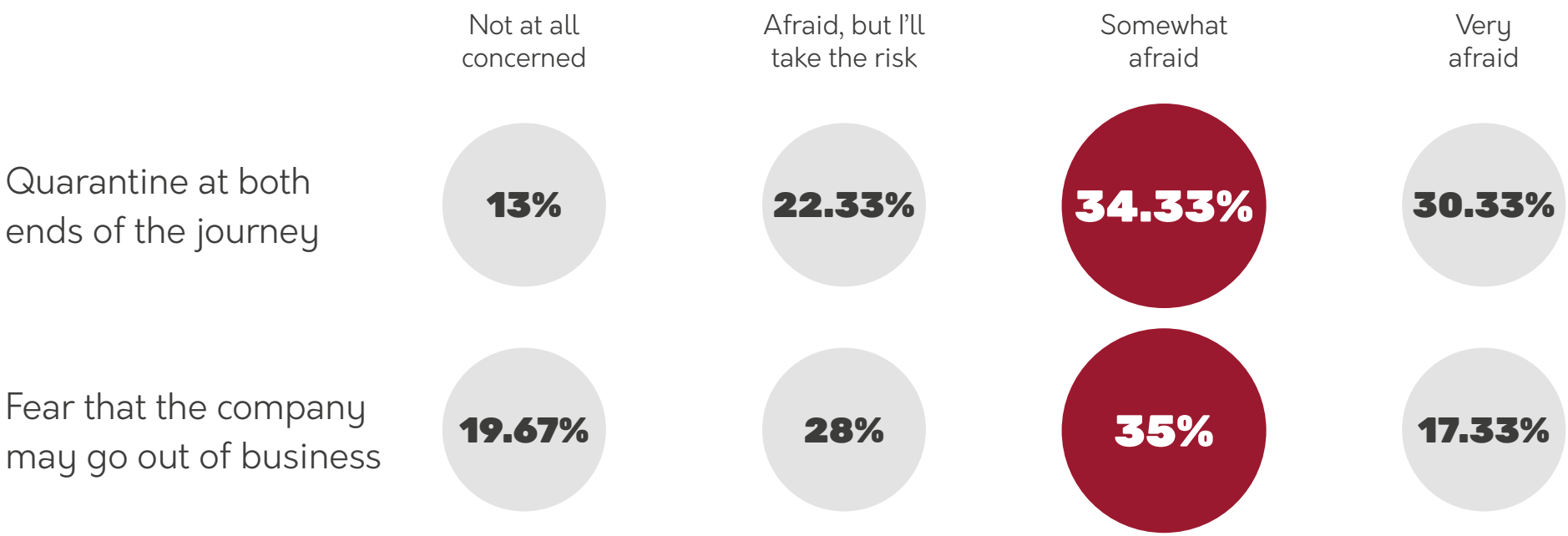
Those operators in other countries who target and rely on Europeans, you have to take into account that a combined 47.83% of the intended market may not wish to travel internationally. For those operators based in Europe and who cater more for a domestic market, this is great news as it makes for a strong market and goes along the lines of what I have been advising our customers. Also remember that some travellers will consider a neighbouring country to be 'domestic' travel.

If you can, have two strategies: one to focus on domestic travellers as this will be what opens up first, and another to target international travellers wishing to visit the various destinations in Europe. These should open up mid-late 2021.

Question Two

In regards to booking a trip, how fearful are you about each of the following?

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Catching Covid-19	9.33%	30.17%	37.50%	23%
Losing my deposit	17.50%	26.50%	37.83%	18.17%
Not having the ability to change my journey date	17%	27%	38.33%	18.17%



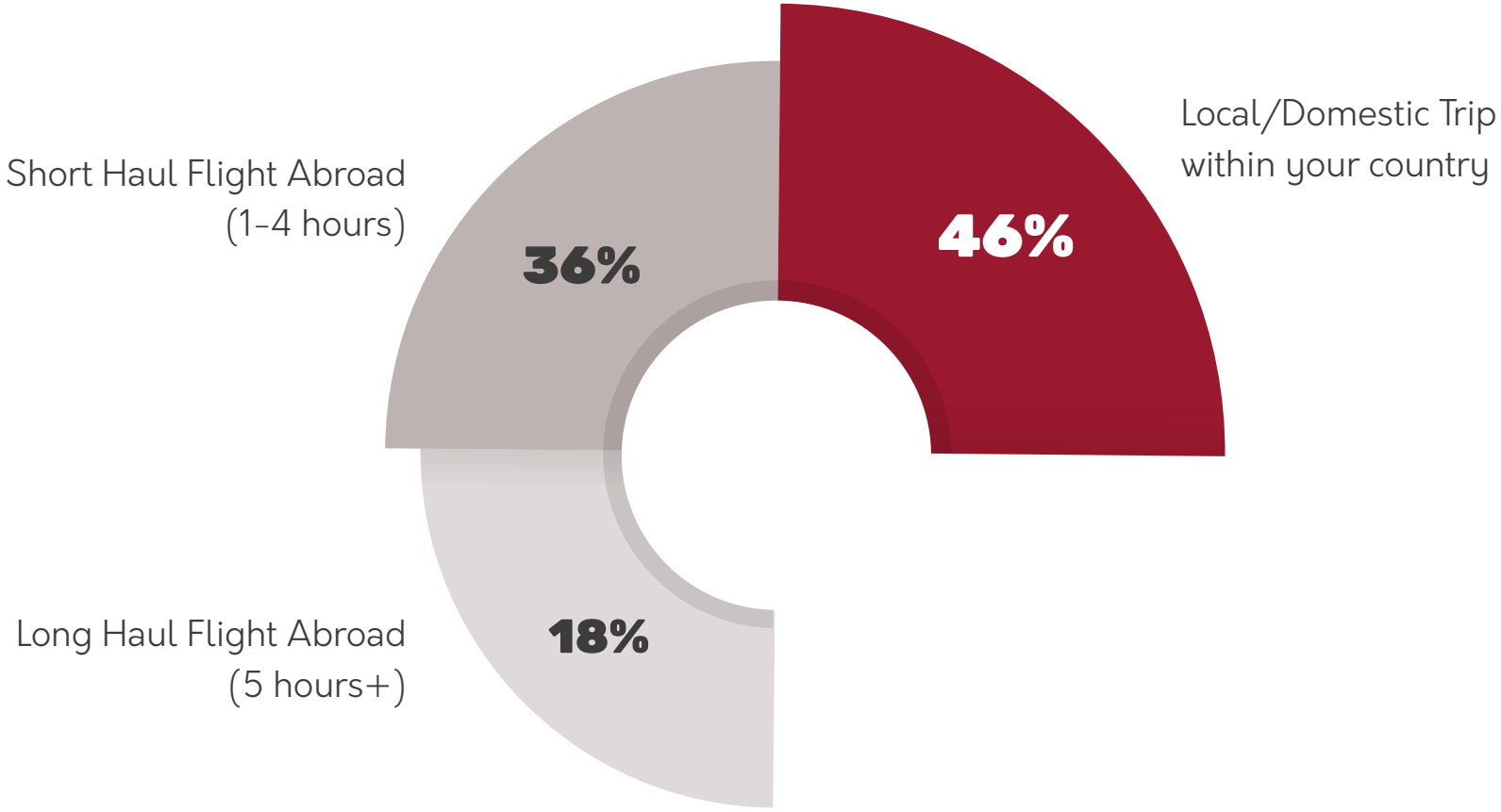
Like everywhere else at the start of this pandemic, qualitative insights showed us that the main fear for travellers was the thought of losing their deposits and money booked on trips. This, and not having the ability to change dates without repercussion was high on their minds.

While those are still very important factors for travellers, catching COVID-19, going into quarantine and the fear that they may book a trip for that business to stop trading has grown. This is understandable as we know more about this virus than we did back in March 2020. In fact, out of all the regions, the split between the fears is pretty even across the board for Europeans.

Remember: 82.17% of people still wish to travel, more so internationally. Meanwhile, 56% of European travellers say that losing their deposit or not having the ability to change dates makes them somewhat or very afraid to book. It is imperative that you have flexible terms, especially if you are targeting European travellers. Flexible terms will help European tour operators targeting a domestic market as much as international operators trying to attract European travellers. If you offer flexible terms, you may be able to persuade some of those who are somewhat afraid of catching the virus to book with you.

Question Three

If travel restrictions are lifted in 2021, what type of trips/holidays appeal most to you?



tma. tourism marketing agency

Only 46% of European travellers find domestic travel appealing for 2021. While this is the majority response of the three options, it's important to note that Europeans are heavily leaning toward international travel. Only 18% are considering long-haul destinations for this year, however.

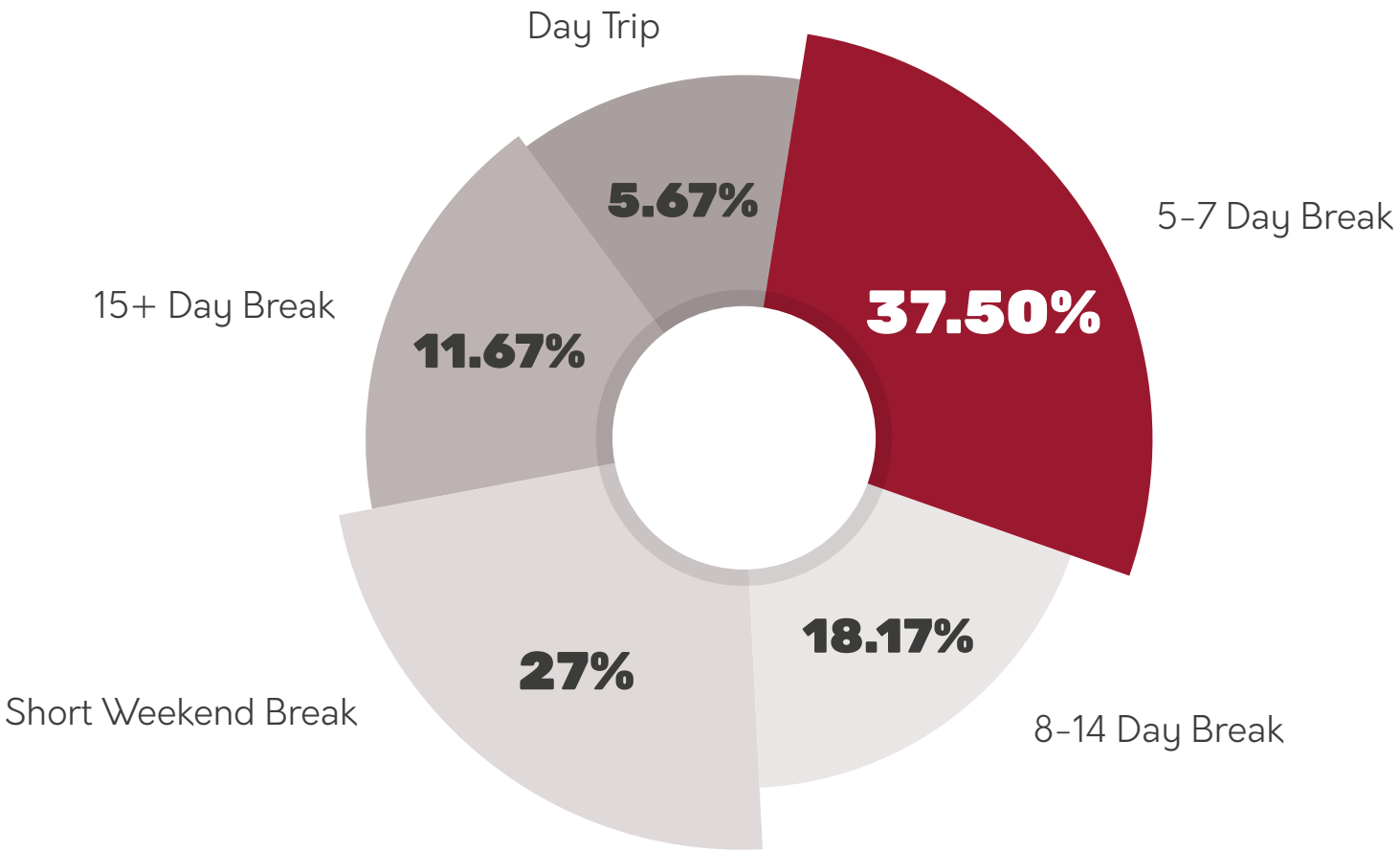
This shows us that a local and domestic strategy could be key for the survival of tour and activity providers based in Europe. But it also says that those international businesses who target European travellers have an opportunity here. Other European destinations could attract short-haul travellers, while long-haul destinations like the Americas, Asia, or Oceania might need to wait for next year. Look at the vaccination map to determine which European and other international countries will be open in 2021 and beyond — although keep in mind that vaccination rollout is just part of the overall picture.

Local and domestic travel have grown due to the pandemic but it is encouraging to see that many still wish to travel abroad in 2021, if and when they are allowed to.

The long-haul market isn't dead, with 18% of travellers still considering such a journey. This will continue to improve from the current situation, but growth will be slower so aim for this picking up more in 2022/23, all going well.

Question Four

When Covid is no longer a concern, how long will your first trip/holiday be?



tma. tourism marketing agency

So we have established that the majority of travellers would be split between local/domestic and short-haul travel in 2021, but how long would they travel for?

Going by these figures in Europe, a combined 64.50% of European travellers would prefer short weekends or week-long breaks. Note that 8-14 day breaks are high, too, at 18.17%, but this was expected as many European workers have more vacation time available to them.

The shorter breaks are also very important for those of you who are day-tour operators or provide an attraction, as travellers' time will be more limited. Remember, you are not competing against other operators per se, but you are competing for someone's time. A traveller can decide to go out for a meal, visit a museum, meet friends, take in a show, or a host of other forms of entertainment that your product is competing against. Operators are in the entertainment business, so it is other forms of entertainment you are competing with.

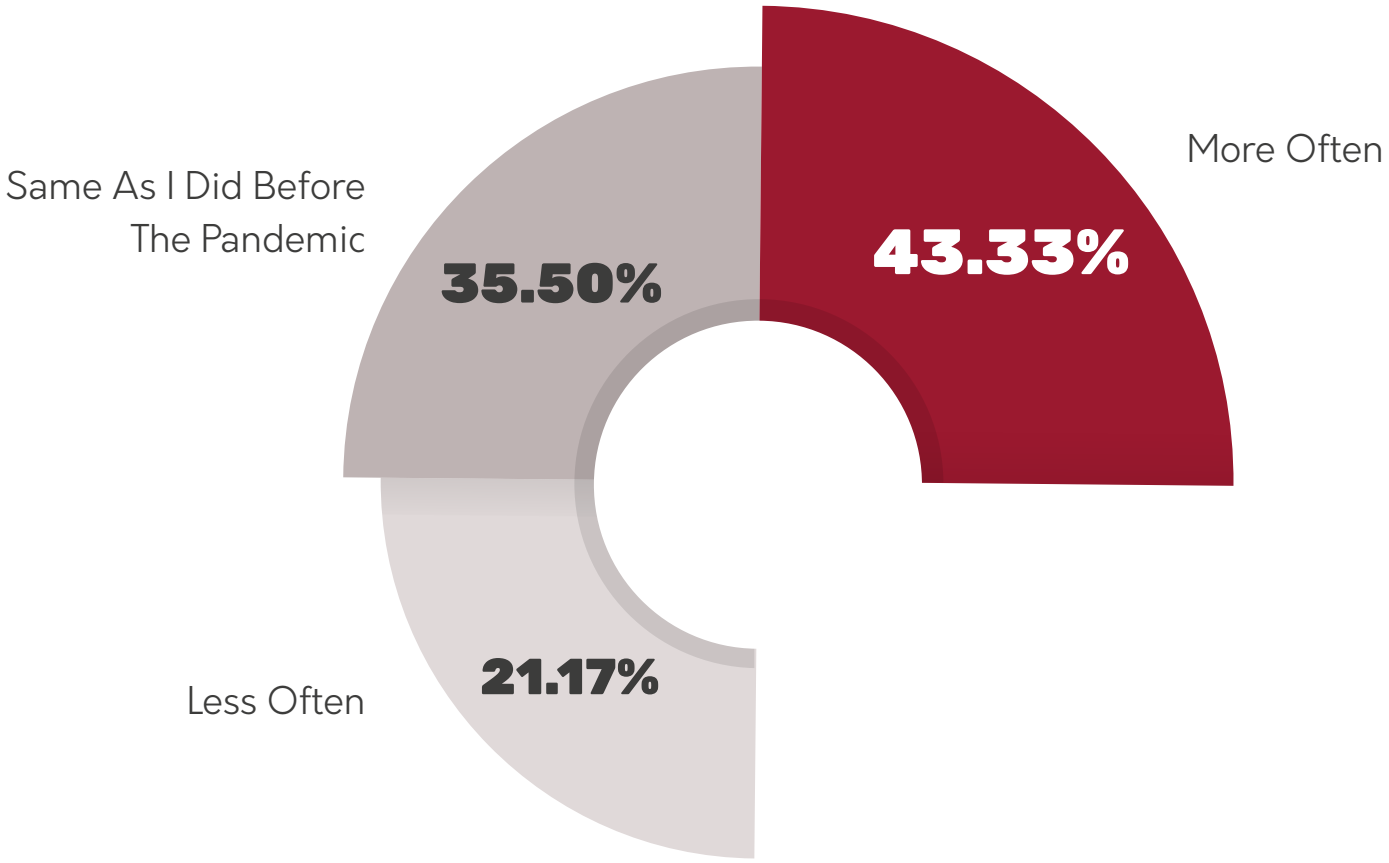
For operators in Europe looking to target international customers, look at those destinations close by as the usually-strong North American market, along with other parts of the world, will either be unable or less willing to travel that far a distance. Likewise for those who target European travellers from international destinations.

When marketing your product, keep in mind that those visiting your destination may have limited time, so 1- or 2-hour day tours may be advisable. A day-long tour may be harder to sell, especially if they are only visiting for three days. This will not be the case for those who do travel for 8-14 days, of course.

If you happen to run and own an Airbnb or other form of accommodation, then you are in a strong position for this market in 2021. Hiring vehicles, campervans, and motorhomes will also explode in demand in 2021.

Question Five

Post-Covid, do you intend to travel internationally...



tma. tourism marketing agency

With this question, we wanted to see if being in lockdown and experiencing restrictions for the last year have driven people to desire international travel more or less than before.

Interestingly, a high percentage (43.33%) said they do wish to travel internationally more, which is great news for those who target this demographic. Another 35.50% said they would travel around the same as they did before; however, 21.17% said they would travel internationally less often.

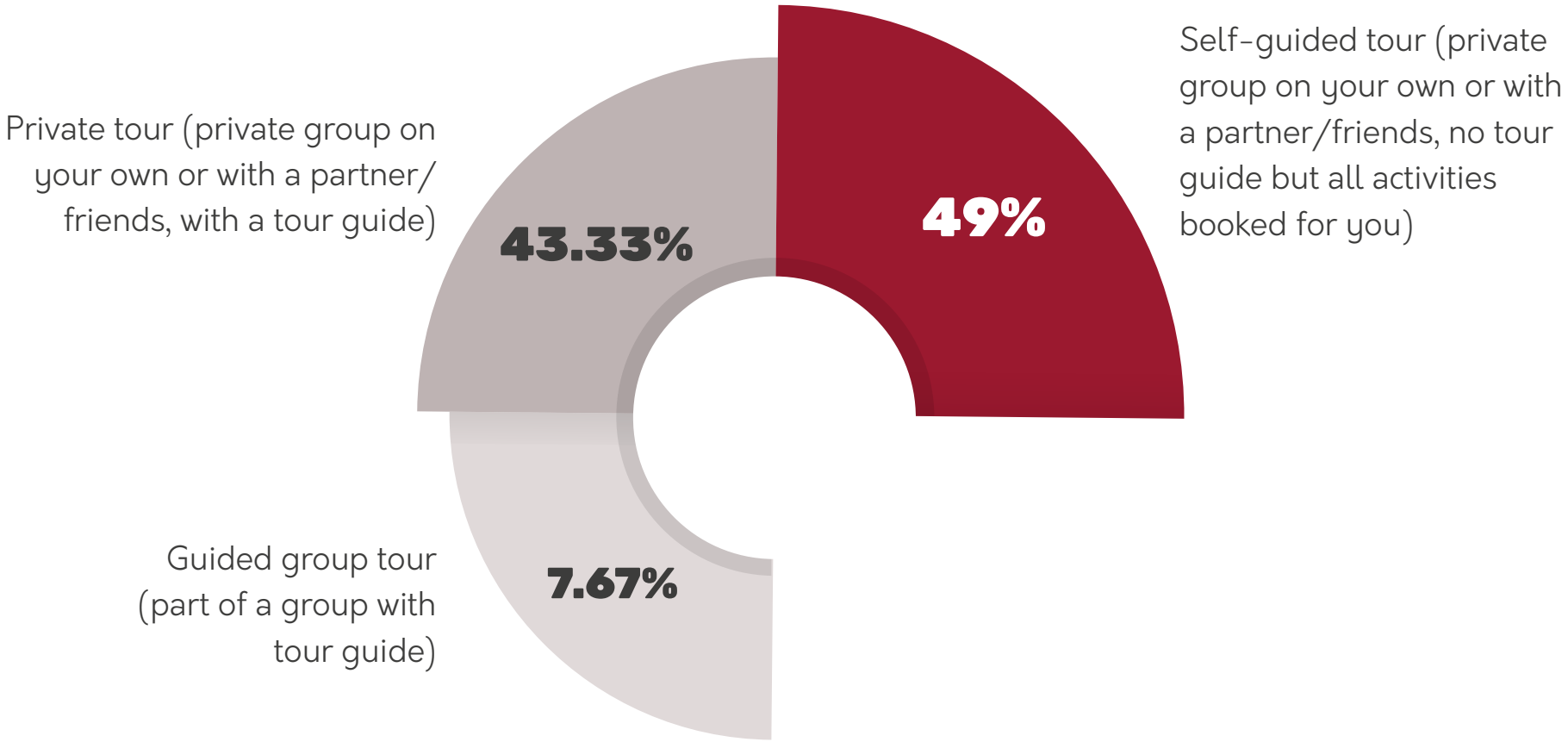
There are many factors at play here as travellers consider decreasing their international travel. For some, financial concerns after a challenging year will limit big trips; others will still be wary of the virus until vaccinations are fully rolled out. Some will simply feel that travel has contributed to the situation we are in or that our planet is a little 'healthier' because of the reduced travel.

However, a combined 78.83% of those asked do wish to travel internationally when they can, some more than others. This provides many opportunities for operators and activity providers to capture this market.

Again, take into account the previous question on the length of travel. While 43.33% of people wish to travel more, this will more likely be more short weekend breaks or week-long breaks — they may just do more of them.

Question Six

When travelling in 2021, what types of tours or activities appeal to you most?



tma. tourism marketing agency

This was one question that I was most interested in seeing responses. Would the pandemic change the types of products that travellers would wish to purchase?

In 2019, at the height of tours and activities, self-guided tours was the biggest-growing sector at that time, and that was before the pandemic. That trend is only going to be intensified in 2021 and beyond because travellers will be looking for a more intimate, private experience, partly due to safety concerns.

From those we surveyed in Europe, 49% would prefer to participate in a self-guided tour with their friends/family and no tour guide. Equally impressive is 43.33% want a private tour with their own tour guide. What may be worrying for some, is that only 7.67% would take a guided group tour.

Going by these figures, it may be imperative that tour and activity businesses in Europe start offering a private and self-guided option if you do not do so already.

We have a number of our own clients who have or are in the process of developing alternative options of their products to cater for this market. In fact, I would encourage any operator to provide a self-guided option as this can provide a passive income. Think about it: you can offer the same product as you currently provide, at a cheaper price, but without the expense of a tour guide, giving you a bigger profit margin.

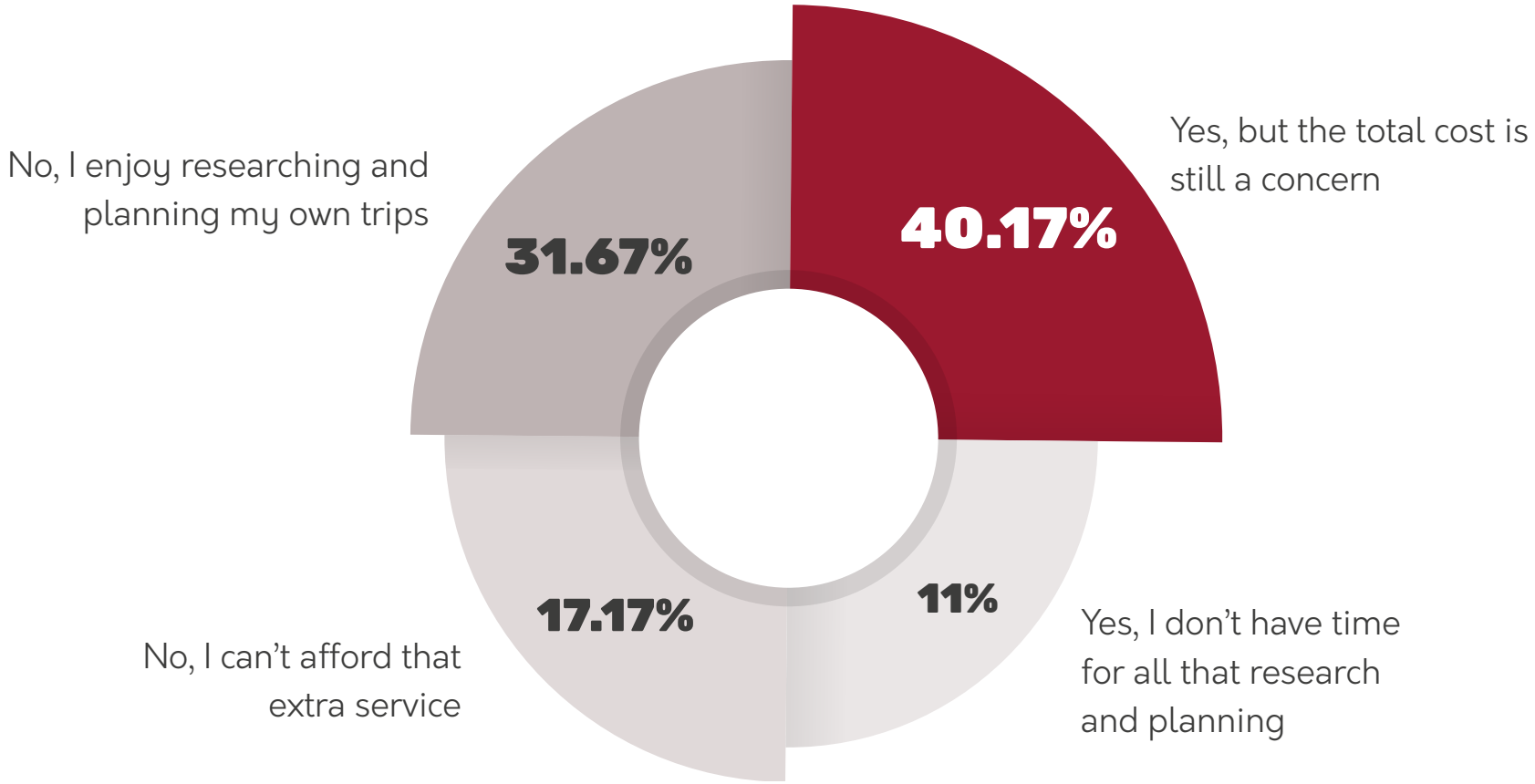
For multi-day providers, you organise every aspect for your customer, booking accommodation, tickets to attractions, transportation, etc, like you normally do, but let your customer take themselves along that journey. You can provide a travel guide to accompany them, or speak to businesses like Clio Muse or Autoura to create an audio or AI guide that can accompany them. One of our clients, Overland Ireland, have even created their own app for their self-drive option.

Day tour companies can also provide self-guided options using these apps and platforms to create a passive income. For me, this is more of a realistic option than the time and effort of creating virtual tours.

And no, this does not mean you are sacrificing your business and consumers will all of a sudden stop taking in-person tours. That will still be a big market. A great experience with a self-guided tour may convince some to try a guided tour further down the line. But, in any case, if both are generating you revenue and — more importantly — a profit, then it's win-win.

Question Seven

Would you pay more to have everything booked and organised for your trip?



tma. tourism marketing agency

If self-guided and private tours are the most desired by European travellers, would they pay more to have everything organised for them?

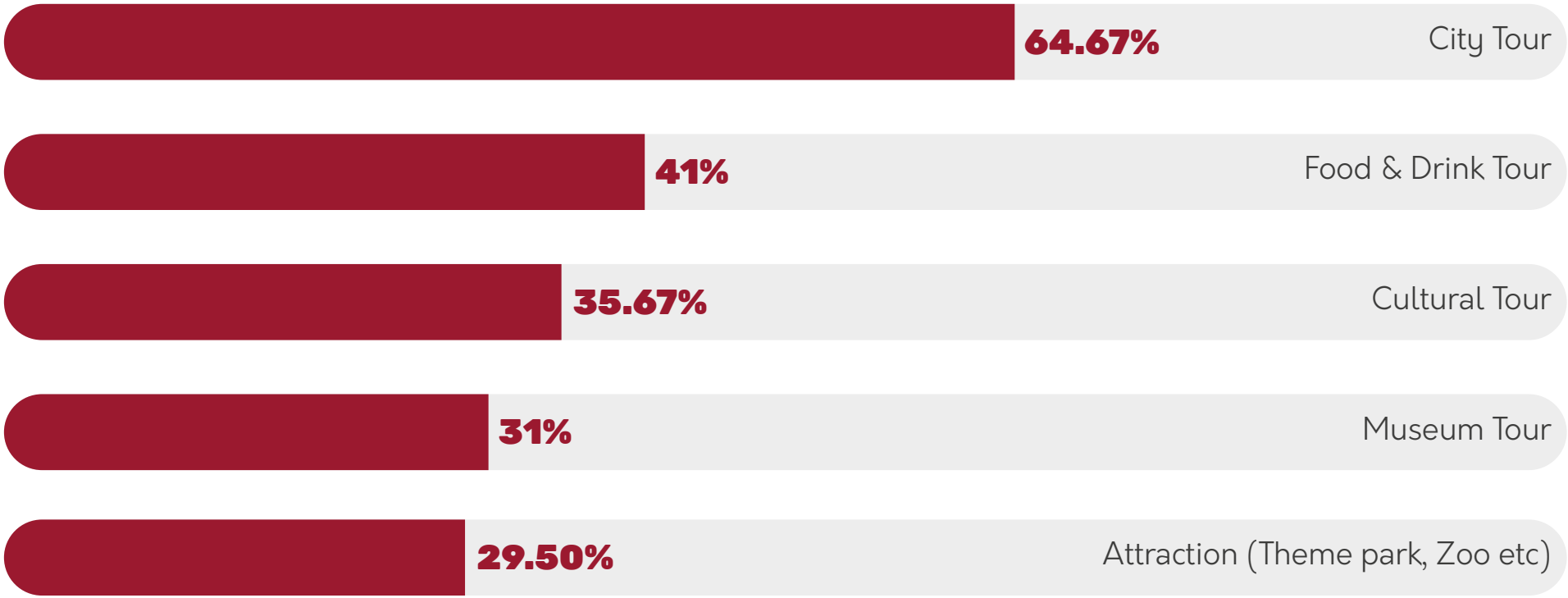
Going by the figures, a combined 51.17% of those asked would pay more; with 11% saying they simply don't have the time to do it themselves, and 40.17% saying they would but the total cost would still be a concern. This highlights that more than half would prefer to have everything organised for them and pay for the privilege, as long as the increase in the cost is not too much.

Think about what has happened over the last 12 months. We have all been 'stuck' in limbo and a good majority of travellers would pay a premium just to experience 'something' again. That €120 day tour that might have put someone off before may seem more attractive now as people will just say 'screw it, I want to have some fun again'. Play on this aspect in your marketing and, whatever you do, do not reduce your prices! I know some disagree with me on this but I feel travellers will pay a little more than the normal asking price just so they can experience something again.

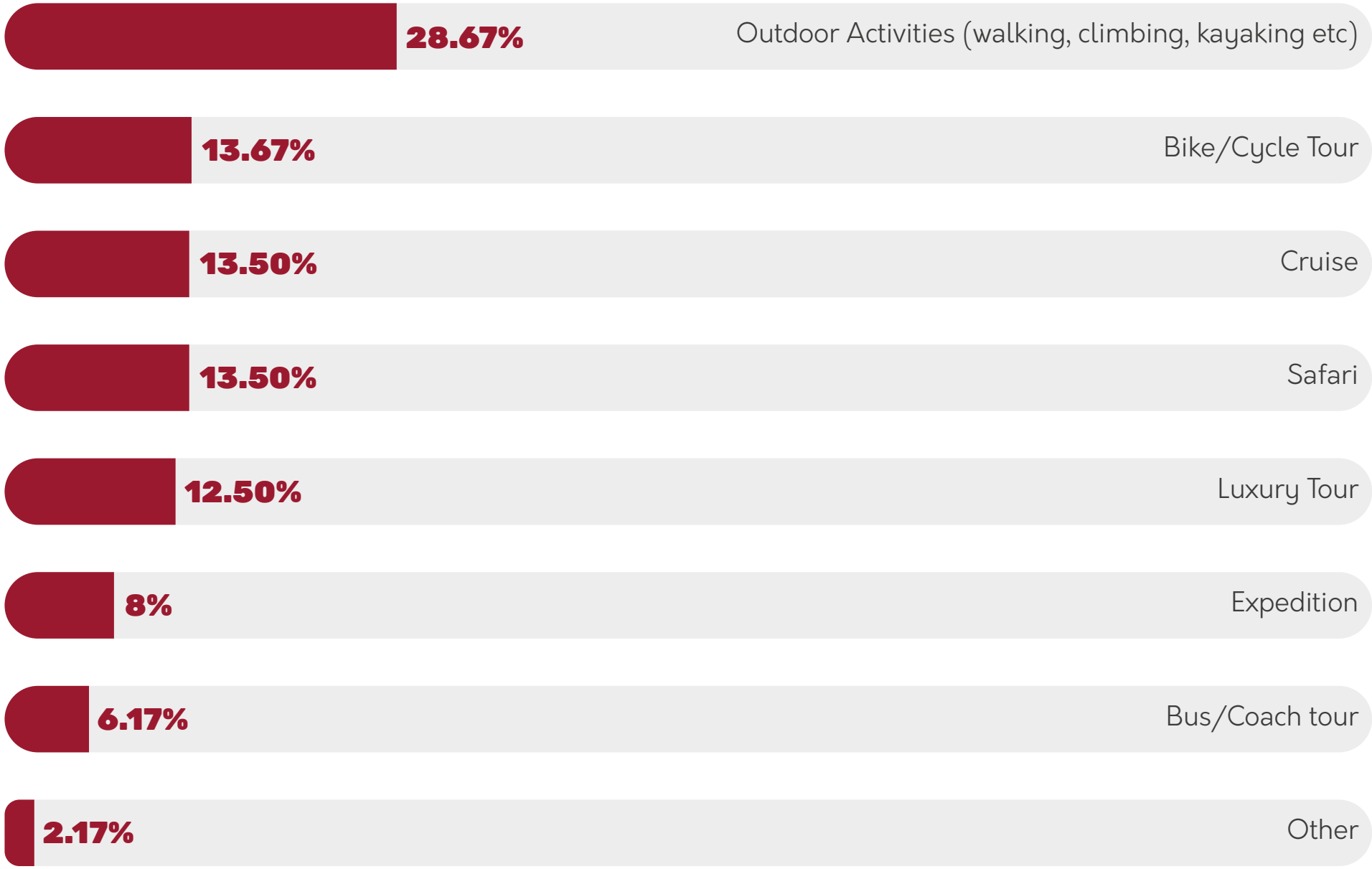
Do however take into account that a combined 48.84% still prefer to research and do all the organising themselves, or they assume they can't afford to pay for that type of service. This is why it is very important to have private, self-guided, and guided options on your tours at varying prices and varying number of hours/days.

Question Eight

Which tour or activity are you most looking forward to once travel opportunities are available again? (select your top 3)



tma. tourism marketing agency


28.67%
Outdoor Activities (walking, climbing, kayaking etc)
13.67%
Bike/Cycle Tour
13.50%
Cruise
13.50%
Safari
12.50%
Luxury Tour
8%
Expedition
6.17%
Bus/Coach tour
2.17%
Other

So we have established that European travellers are split between local/domestic and international travel, preferring short weekend or week-long breaks and self-guided or private tours, but what type of tours are they interested in? We asked for their top three.

Overall, city tours are the most desired at a dramatic 64%, followed by food and drink tours, cultural tours, and museum tours.

What I do find very interesting is, despite still being a high percentage, outdoor activities are not higher up the list. City tours win by some margin, so being in a city full of people does not frighten Europeans.

Like the worldwide average, unfortunately bus/coach tours are once again way down the list of priorities. Again, this will be for a few reasons, one being the thought of sitting inside a vehicle with complete strangers and the health and safety aspects of that. Remember, however, that the preference for travellers is self-guided or private tours, so taking their own transport or hiring a vehicle for their own use will be more attractive. That's great news for campervan and motorhome providers.

I am not surprised food and drink tours are high on the list as this is a great way to bring people together, and it was a growing market pre-Covid. Attractions are also high on the list so these European businesses should do well in 2021.

For those who said 'other', there was a clear trend of wanting to visit family and friends. As you can imagine this is very important to a lot of people so creating products that caters for family get-togethers may be an option for some.

Some of the 'Other' entries entered in our research....

- Beach
- Resort
- See The NBA
- Skiing
- To See My Family
- Wellness

Question Nine

If you could travel to any country by the end of 2021, which country would that be?

Top Ten Destinations

tma. tourism marketing agency

This was an open-ended question to help get a feel of the consumer's desired destination if given the choice to travel to any country or region. It's handy for those who attract international customers and interesting to see the differences based on the region of survey responses.

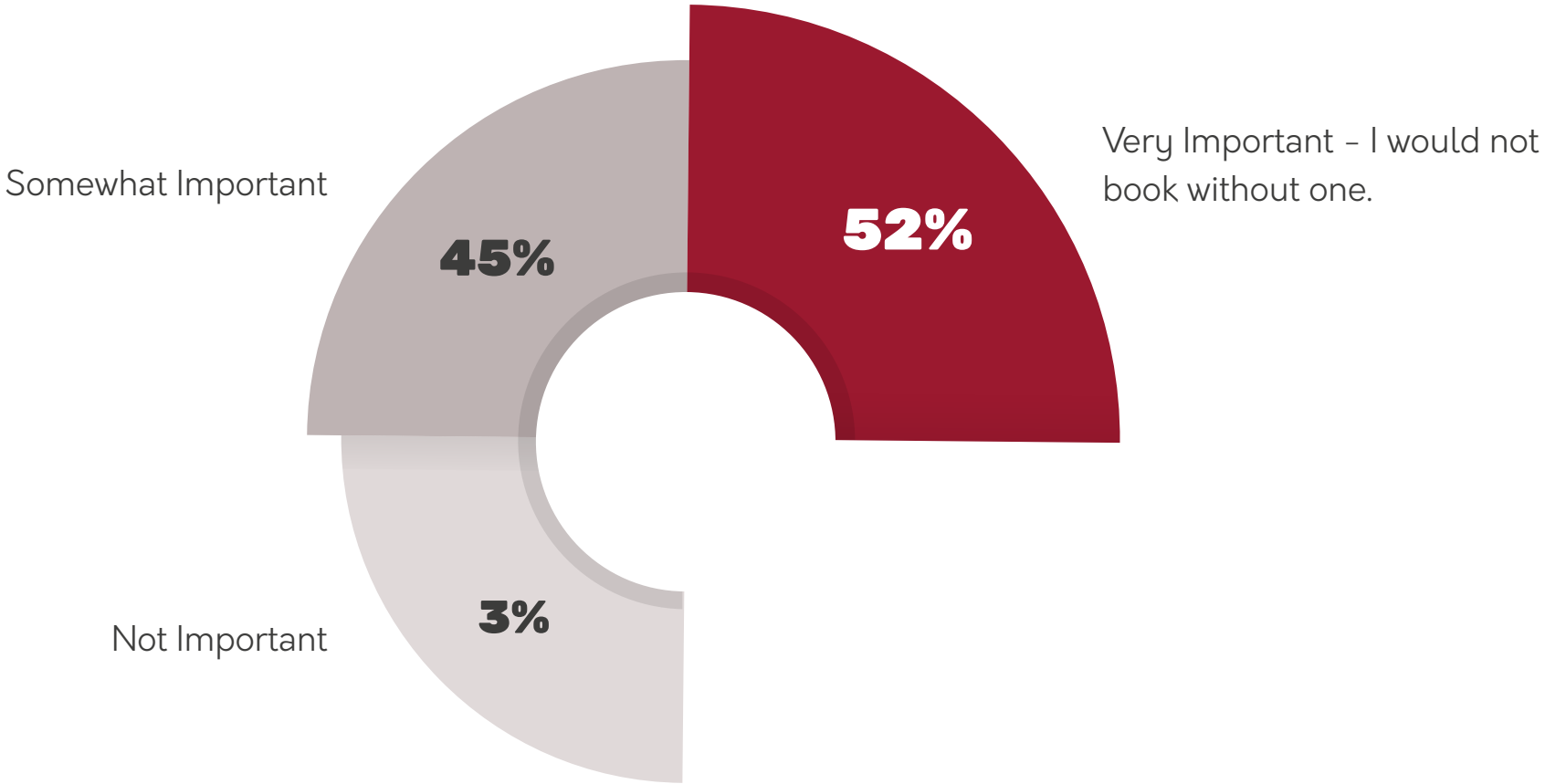
Europeans also followed the global trend; despite it being one of the worst affected destinations during the pandemic, Italy was the most desired destination once again, which is very encouraging for those operating in Italy. France was a close second with USA, Spain, and Germany making it into the top five.

While this list does not show destinations that Europeans can travel to currently, it does provide some insights into travellers' desired destinations that can help inform your marketing. Targeting specific travellers to book for later in 2021, 2022, or 2023, depending on the vaccination rollout as highlighted in the map, may be an option for some of you.

If you are in Italy for example, focusing on a week-long break, targeting those within North America or other parts of Europe with a private or self-guided product may be what attracts a good majority of this demographic that's looking to travel internationally.

Question Ten

How important is a Covid Guarantee Policy in your booking decisions? (for example, a policy that allows you to move dates or offer full/partial refunds etc)



tma. tourism marketing agency

With this question I wanted to highlight how important it will be for your business to have a Covid Guarantee Policy or some form of flexible terms.

The numbers speak for themselves: 52% of travellers will not even book with a company if they do not have one. I urge you to make sure you have flexible terms displayed prominently on your website and in your marketing materials.

A further 45% said it is somewhat important so a flexible policy is more likely to persuade them to book with you over someone who does not offer one. Note that this is a combined 97% of travellers who would expect some form of flexibility when booking a travel-related product.

You must provide flexible booking terms to give consumers confidence in your business. By not providing flexible terms, you're giving the impression that you do not care about their fears.

If you are a multi-day operator, think about allowing travellers to pay a small deposit with the rest payable 30 days before the start date, or even a subscription over a period of time to help generate regular income for you and your business. Allow the traveller the ability to easily change dates as many times as necessary.

For day-tour operators, why not offer to reserve a spot for free, or 50% upfront and the rest 24 hours prior to start date. Again, allow them to easily change dates as many times as necessary.

Even when Covid is a distant memory, travellers will not go back to how it was. They will expect and demand the same treatment, so more flexible terms are here to stay. Bear that in mind for the future of your business and marketing strategies.

We shall now highlight key audience demographics of those who participated in this research.

Careers

Other	22.00%
Education	9.00%
Healthcare and Social Assistance	6.83%
Arts, Entertainment, or Recreation	5.67%
Hotel and Food Services	5.17%
Finance and Insurance	5.00%
Construction	3.83%
Retail	3.50%
Marketing/Sales	2.83%
Information - Services and Data	2.33%
Legal Services	2.33%
Telecommunications	2.33%
Manufacturing - Other	2.33%
Homemaker	2.17%
Manufacturing - Computer and Electronics	2.17%
Information - Other	2.17%
Government and Public Administration	2.17%
Scientific or Technical Services	1.83%
Software	1.67%
Agriculture, Forestry, Fishing, or Hunting	1.50%
Transportation and Warehousing	1.33%
Consulting	1.33%
Security	1.17%
Fashion/Apparel	1.17%
Personal Services	1.17%
Broadcasting	1.00%
Energy/Utilities/Oil and Gas	0.83%
Automotive	0.83%
Real Estate, Rental, or Leasing	0.67%
Military	0.67%
Shipping/Distribution	0.67%
Human Resources	0.50%
Wholesale	0.50%
Processing	0.33%
student	0.33%
Market Research	0.33%
Advertising	0.17%
Publishing	0.17%

Business/Job Role

Prefer not to say	33.83%
Other non management staff	14.17%
Middle Management	6.83%
Owner or Partner	6.33%
Craftsman	6.33%
Technical Staff	5.33%
Administrative/Clerical	5.17%
C-level executive	5.00%
Sales Staff	2.83%
Supervisor	2.33%
Project Management	1.83%
Foreman	1.67%
Senior Management	1.67%
President/CEO/Chairperson	1.33%
Director	1.17%
Chief Technical Officer (CTO)	1.17%
Product Manager	0.83%
Business Administrator	0.67%
Buyer/Purchasing Agent	0.33%
HR Manager	0.33%
not_work	0.33%
Chief Financial Officer (CFO)	0.33%
faculty_staff	0.17%

Education

University	44.67%
High school	27.00%
Vocational/Technical college	13.17%
Post-graduate	11.33%
Middle school	3.83%

Employment Status

Employed for wages	45.83%
Student	24.67%
Out of work and looking for work	8.33%
Self-employed	8.17%
Other	5.17%
Homemaker	3.67%
Retired	1.50%
Out of work but not currently looking for work	1.17%
Unable to work	0.83%
Military	0.67%

Household Income France

Under 15,000€	35.29%
Prefer_not_to_say	15.69%
15,000€ - 29,999€	15.69%
30,000€ - 44,999€	15.69%
45,000€ - 74,999€	7.84%
75,000€ - 124,000€	5.88%
125,000€ - 199,000€	3.92%

Household Income Germany

Under 12,500€	23.91%
25,000€ - 37,499€	17.39%
Prefer_not_to_say	15.22%
18,500€ - 24,999€	15.22%
37,500€ - 49,999€	15.22%
50,000€ - 99,999€	6.52%
125,000€ and above	4.35%
100,000€ - 124,000€	2.17%

Household Income Spain/Portugal

5,000€ - 9,999€	28.40%
Prefer_not_to_say	22.57%
Under 4,999€	19.07%
10,000€ - 19,999€	17.90%
20,000€ - 29,999€	8.17%
30,000€ - 49,999€	2.72%
50,000€ - 99,999€	0.78%
100,000€ and above	0.39%

Household Income Greece

Under 15,000€	46.88%
15,000€ - 29,999€	33.33%
Prefer_not_to_say	11.46%
30,000€ - 44,999€	5.21%
45,000€ - 74,000€	2.08%
125,000€ - 199,000€	1.04%
75,000€ - 124,000€	0.00%
200,000€ and above	0.00%

Household Income Italy

15,000€ - 29,999€	28.67%
Under €15,000	24.67%
Prefer_not_to_say	17.33%
30,000€ - 44,999€	16.00%
45,000€ - 74,999€	6.67%
75,000€ - 124,000€	3.33%
125,000€ - 199,000€	2.67%
200,000€ and above	0.67%

Marital Status

Single	42.50%
Living with partner	23.50%
Married	23.00%
Prefer not to say	5.00%
Divorced	2.67%
Separated	1.67%
Widowed	1.67%

Number of Children

Two	13.50%
None	67.50%
One	12.83%
Three	3.00%
Prefer not to say	2.00%
Four	0.67%
Five	0.33%
Six or more	0.17%

Oceania Consumer Mindset & Intent

We will now break down the statistics, highlighting Australia and New Zealand specifically. Starting with the key takeaways to compare this market to the global results, this section offers insights into region-specific trends for 2021 and beyond.

Destinations: Australia & New Zealand
Age Groups: 18-54+
Gender: Male & Female

tma. tourism marketing agency

Key Takeaways

Globally, 38% of respondents will only travel domestically as soon as it's allowed, while a small majority of respondents (41%) say they will travel internationally as soon as it's allowed. This question was posed with the opportunity to wait until vaccinations were prevalent before traveling at all. By including the potential for vaccinations to alter travel booking decisions, we can compare this data with a later question that removes the vaccination factor altogether.

Conversely, 48% of respondents from Australia and New Zealand will travel domestically only, while only 28% plan to travel internationally as soon as it's allowed.

While not statistically viable on its own, New Zealand was the only country where the majority of respondents said they would not travel until vaccinations were prevalent, even if restrictions were lifted.

Takeaway: Domestic tourism is more important, and more viable, in Australia and New Zealand than anywhere else in the world. If you are based in this region and your main audience, before Covid, consisted of international tourists, then you must do something to convert your products so that they appeal to locals. If you are trying to attract tourists from Australia and New Zealand to your international destination, you may have a tough road ahead.

Globally, travellers are most afraid of quarantine on both ends of their journey, followed by actually catching COVID-19.

In Australia and New Zealand, catching the virus was actually of the least concern for travellers. They fear quarantine like other respondents, but their next greatest fears when booking travel right now are losing their deposit and not being able to change their travel dates.

Takeaway: The virus was more quickly and expertly managed in these two nations, so their fear of catching it is understandably lower than in areas where it continues to rage on and cause such harm. For travellers in Oceania, economic concerns do outweigh health concerns at this point.

Globally, 55% of respondents are most attracted to local/domestic travel if restrictions are all lifted in 2021. Only 17% of respondents are interested in a long-haul trip.

Not surprisingly, 66% of respondents in Australia and New Zealand want to stay local/domestic for any travel in 2021.

Takeaway: If you're based outside of Oceania and Australians or New Zealanders make up a decent portion of your usual customers (pre-Covid), then you will have to work hard to edit your product offering or marketing to target a different audience — at least until there is complete, unfettered travel again.

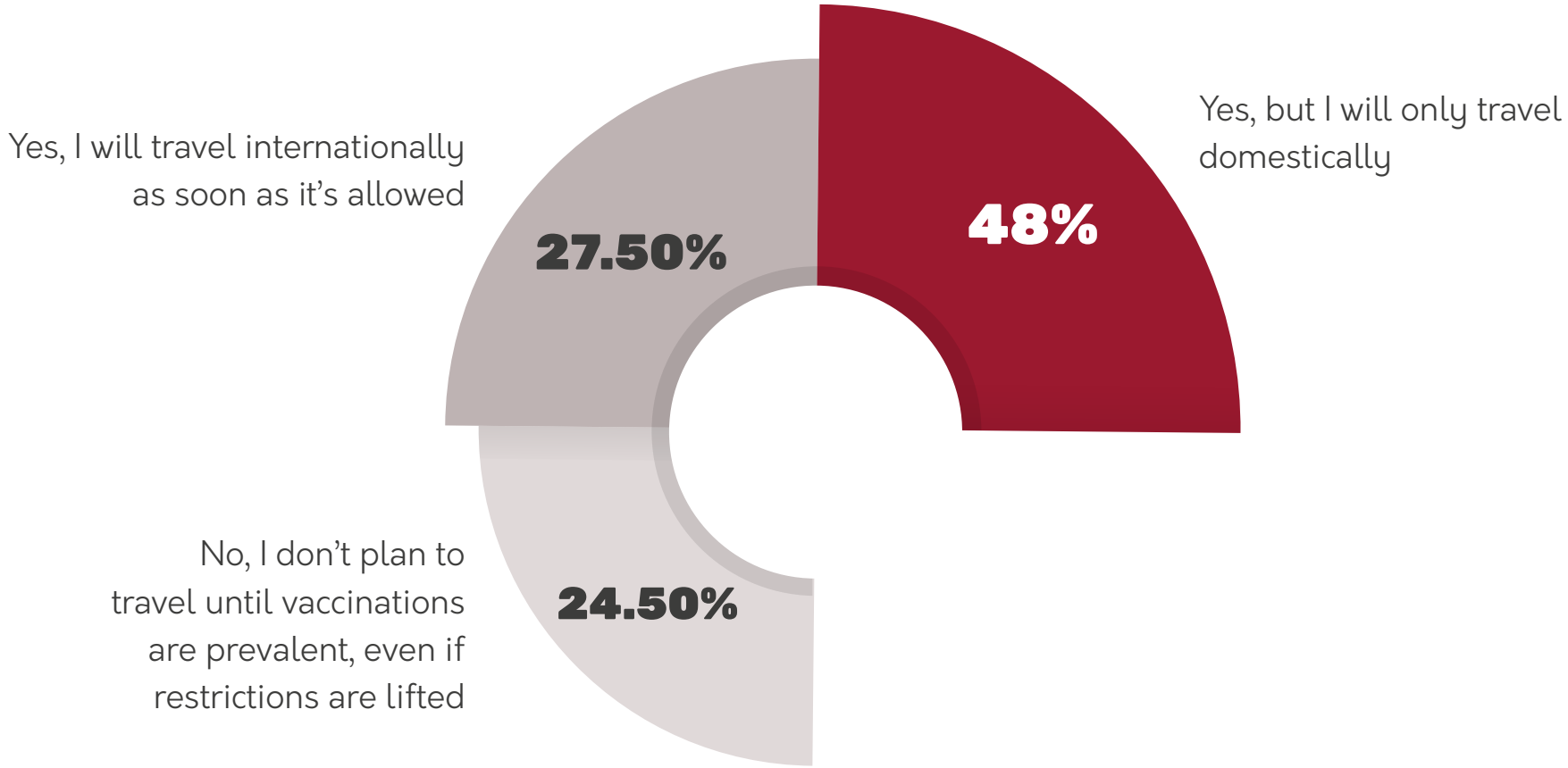
Globally, 12% of respondents say they don't have time to research and plan their travels, so they would be willing to pay more to have that handled for them.

Respondents in Oceania were most likely to enjoy doing the research and planning, at 34%.

Takeaway: When marketing to domestic travellers in Oceania, it may be more successful to offer smaller experiences that can be added to longer trips people are planning themselves. Creating full-on multi-day itineraries may not be worth the time or effort for this market.

Question One

Do you plan to take a trip/holiday as soon as any travel restrictions are lifted?



tma. tourism marketing agency

Focusing on the Australia and New Zealand markets, we can see that a combined 75.50% wish to travel as soon as they can, however 48% say they will only travel domestically. Going by the stronger restrictions these destinations have, this is not surprising.

The other 24.50% say they will not even travel until vaccinations are more prevalent. This is potentially a large chunk of the population that operators — foreign and domestic — may lose out on, but it's understandable given the messaging in New Zealand especially.

There is a large divide between travellers wishing to travel internationally and domestically with only 27.50% wishing to travel to an international destination.

So what does this mean for the marketing strategies of Oceania based operators?

Those operators in other countries who target and rely on travellers from Australia and New Zealand have to take into account that a combined 72.50% of the intended market may not wish to travel internationally. For those operators based in Australia and New Zealand, and who cater more for a domestic market, this is great news as it makes for a strong market and goes along the lines of what I have been advising our customers there.

If you can, have two strategies: one to focus on domestic travellers as this will be what opens up first, and another to target international travellers wishing to visit Australia and New Zealand in late 2021/early 2022.

Question Two

In regards to booking a trip, how fearful are you about each of the following?

	Not at all concerned	Afraid, but I'll take the risk	Somewhat afraid	Very afraid
Catching Covid-19	21%	25.50%	39%	14.50%
Losing my deposit	18%	21%	40%	21%
Not having the ability to change my journey date	17.25%	22.50%	40.50%	19.75%

tma. tourism marketing agency

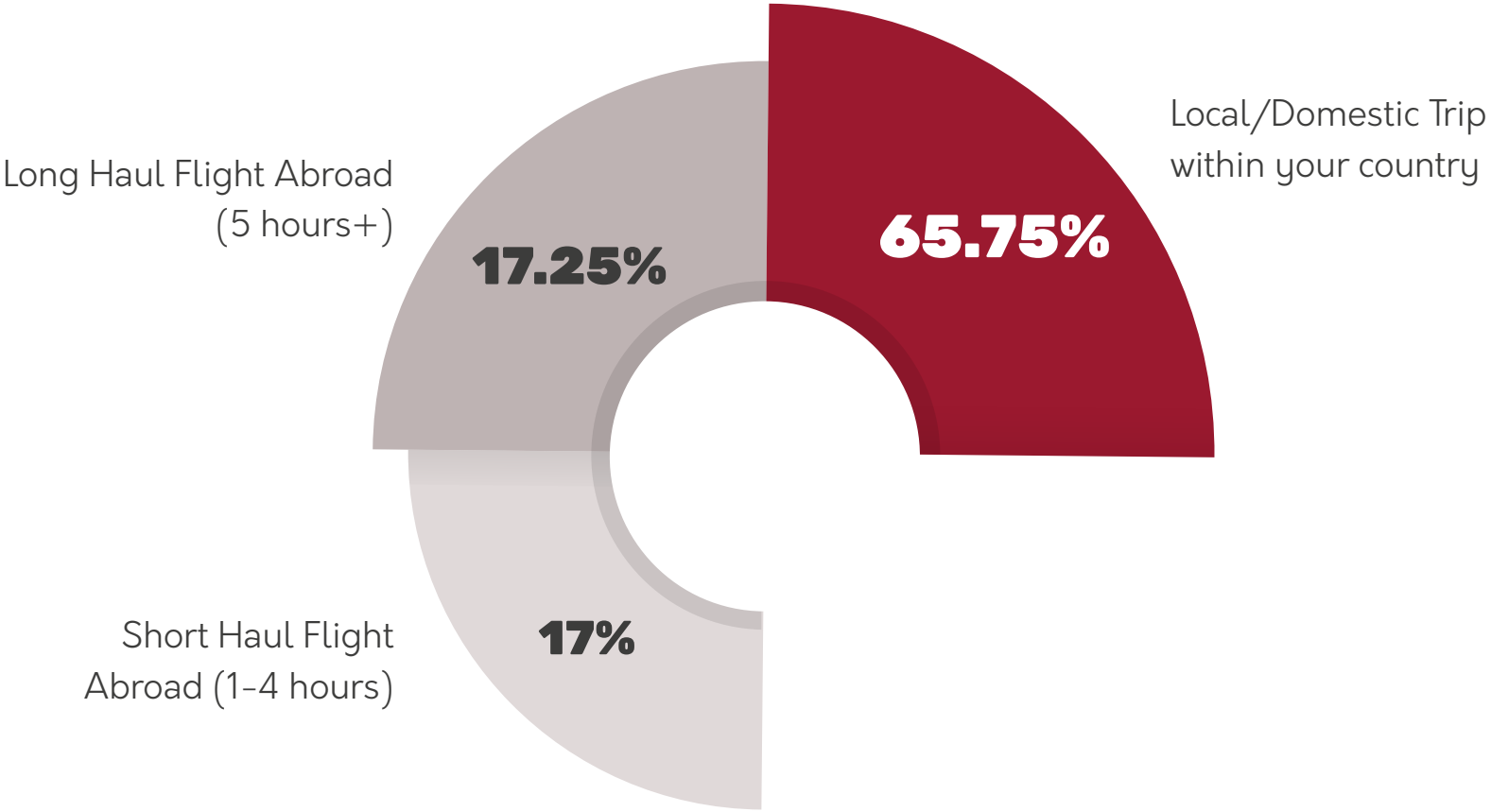
Like everywhere else at the start of this pandemic, qualitative insights showed us that the main fear for travellers was the thought of losing their deposits and money booked on trips. This, and not having the ability to change dates without repercussion was high on their minds.

While those are still very important factors for travellers, catching COVID-19, going into quarantine and the fear that they may book a trip for that business to stop trading has grown. This is understandable as we know more about this virus than we did back in March 2020. In Australia and New Zealand, however, handling of the virus has been much more effective, leaving travellers in this region less concerned about catching COVID-19 than we see in any other region. Catching the virus was of least concern to these travellers, of the five options to consider.

Remember 75.50% of people in Australia and New Zealand still wish to travel, more so domestically. While their top concern is quarantine on both ends of the journey, over 60% of travellers from Oceania are somewhat or very afraid of losing their deposit or not having the ability to change dates. It is imperative that you have flexible booking terms, whether you are targeting the massive domestic market or you are outside of Oceania and trying to attract those travellers who are looking to go internationally. With a flexible policy, you could persuade those who are eager to get out there again soon.

Question Three

If travel restrictions are lifted in 2021, what type of trips/holidays appeal most to you?



tma. tourism marketing agency

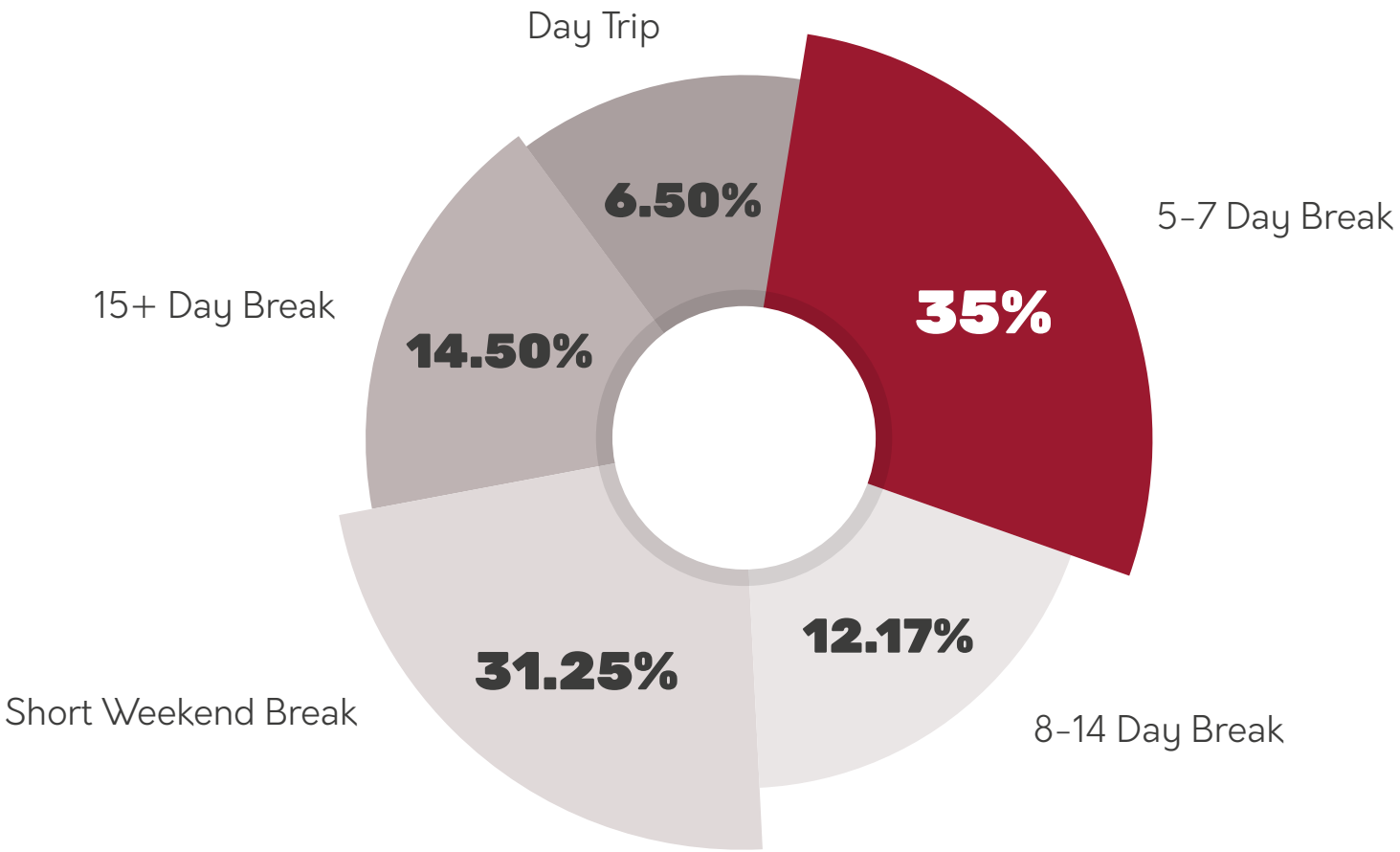
Emphasising the majority of answers in question one, of those surveyed on what type of trip appeals to them the most in 2021, local and domestic wins hands-down at 65.75%.

Only 17% of respondents would even consider a short-haul flight, and that is with restrictions lifted! This highlights the need for a local and domestic strategy as key for the survival of many tour and activity providers in this region. It also shows us that those international businesses who target these travellers may not see much of an opportunity until 2022 and beyond.

With quarantine restrictions being a top concern, followed by other economic worries related to bookings, travellers from this region may be more hesitant to cross borders until things seem more 'normal' at home and abroad.

Question Four

When Covid is no longer a concern, how long will your first trip/holiday be?



tma. tourism marketing agency

So we have established that the majority of travellers would travel local and domestically, but how long would they travel for?

Going by these figures, a combined 66.25% of Australian and New Zealand travellers would prefer short weekends or week-long breaks. This is great for those who provide outdoor activities, too, as these destinations are prime for adventure-seekers.

The shorter breaks are also very important for those of you who are day-tour operators or provide an attraction, as travellers' time will be more limited. Remember, you are not competing against other operators per se, but you are competing for someone's time. A traveller can decide to go out for a meal, visit a museum, meet friends, take in a show, or a host of other forms of entertainment that your product is competing against. Operators are in the entertainment business, so it is other forms of entertainment you are competing with.

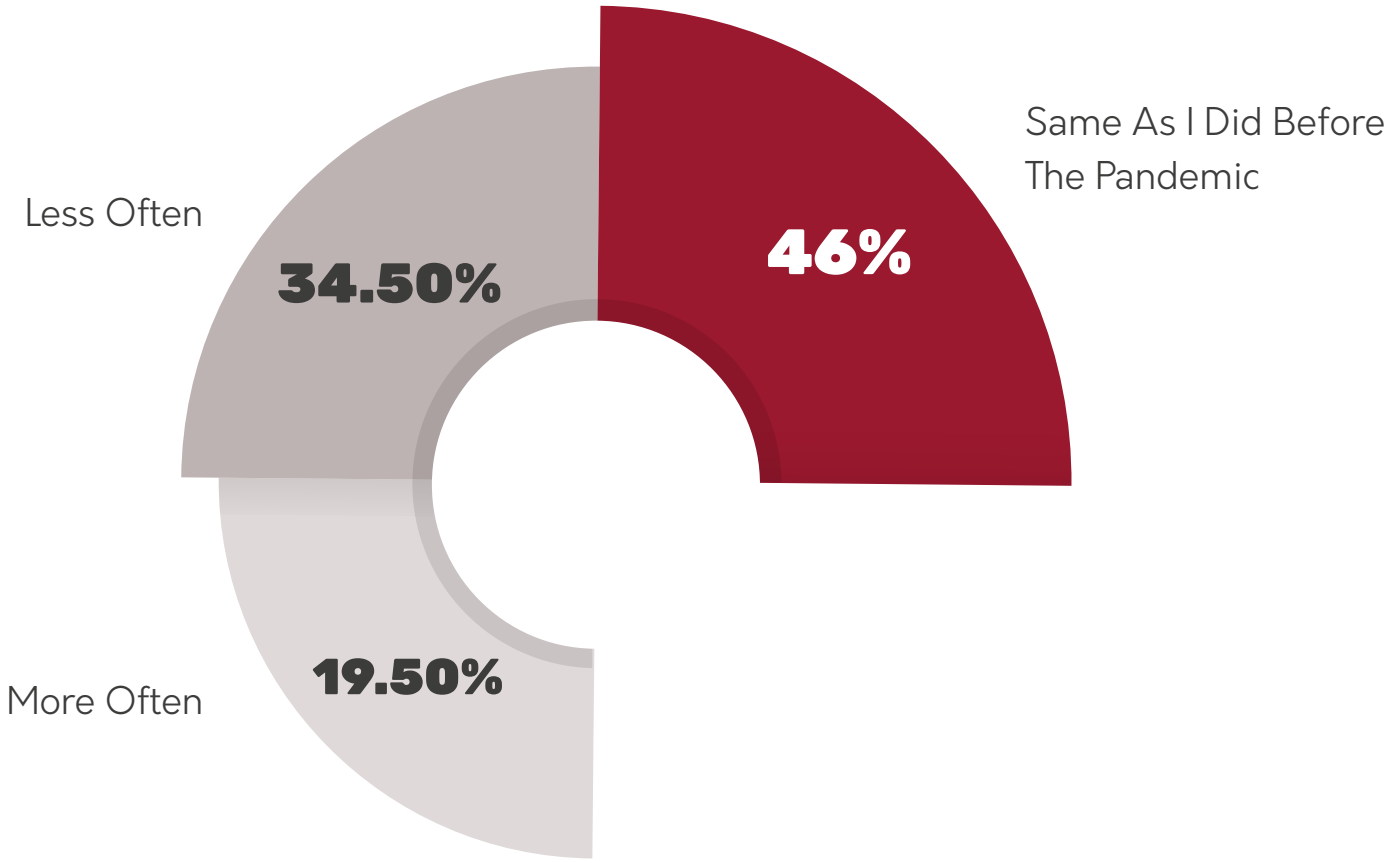
For operators in Australia and New Zealand looking to target international customers, look at those destinations close by, but bear in mind that they may either be unable or less willing to travel that far a distance. Likewise for those who target Australian and New Zealand travellers from international destinations.

When marketing your product, keep in mind that those visiting your destination may have limited time, so 1- or 2-hour day tours may be advisable. A day-long tour may be harder to sell, especially if they are only visiting for three days. This will not be the case for those who do travel for 8-14 days, of course.

If you happen to run and own an Airbnb or other form of accommodation, then you are in a strong position for this market in 2021. Hiring vehicles, campervans, and motorhomes will also explode in demand in 2021.

Question Five

Post-Covid, do you intend to travel internationally...



tma. tourism marketing agency

With this question we wanted to see if being in lockdown and experiencing restrictions for the last year have driven people to desire international travel more or less than before.

Interestingly, 19.50% said they do wish to travel more, which is great news for the future for those who target this demographic. Another 46% said they would travel around the same as they did before. However, a whopping 34.50% said they would travel internationally less often. That's bad news for inbound destinations but great news for domestic markets keeping more travellers nearby.

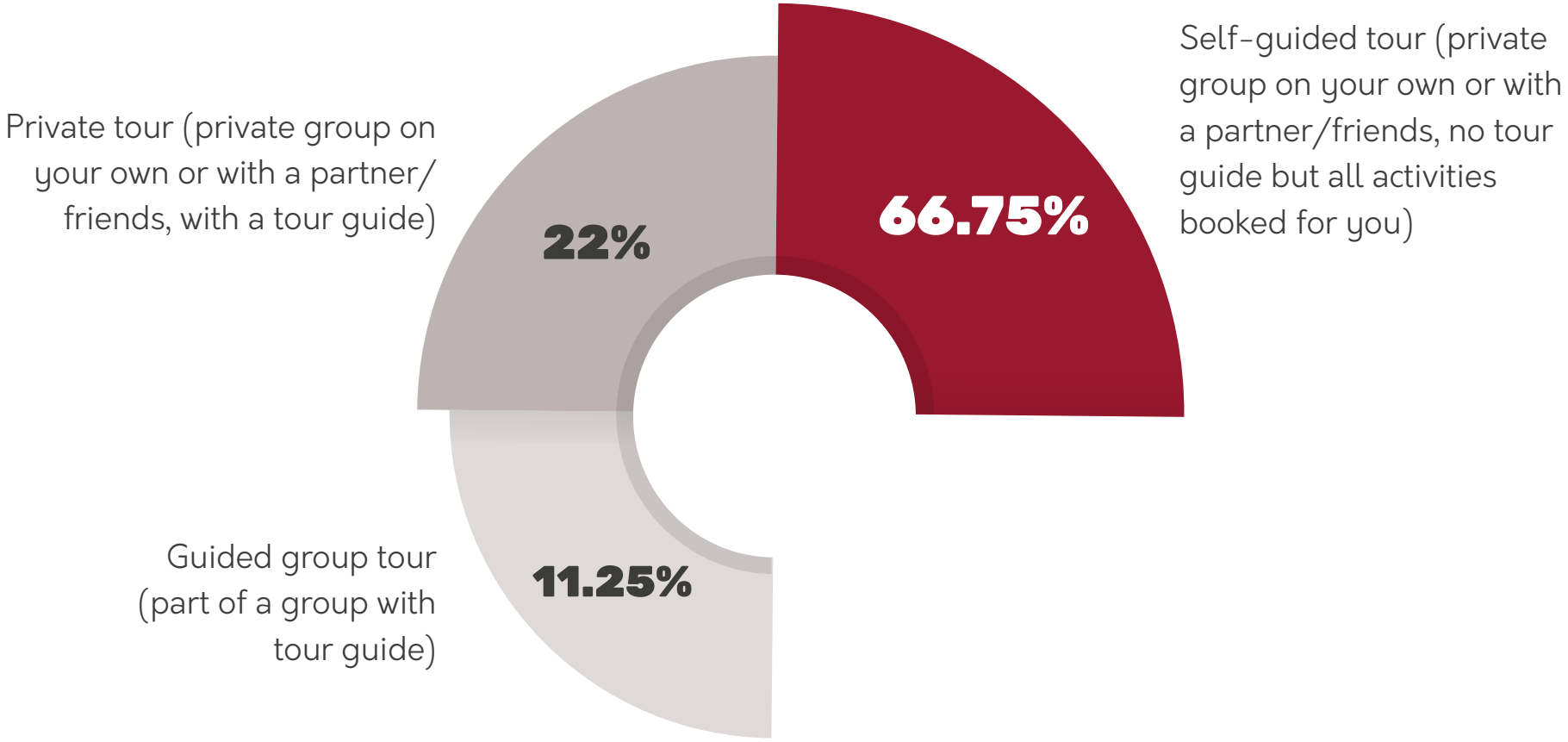
There are many factors at play here as travellers consider decreasing their international travel. For some, financial concerns after a challenging year will limit big trips; others will still be wary of the virus until vaccinations are fully rolled out. Some will simply feel that travel has contributed to the situation we are in or that our planet is a little 'healthier' because of the reduced travel.

However, a combined 65.50% of travellers from Australia and New Zealand do wish to travel internationally when they can, some more than others. This provides many opportunities for operators and activity providers to capture this market.

Again, take into account the previous question on the length of travel. People eventually wish to travel internationally, but this will more likely be more short weekend breaks or week-long breaks, they may just do more of them.

Question Six

When travelling in 2021, what types of tours or activities appeal to you most?



tma. tourism marketing agency

This was one question that I was most interested in seeing responses. Would the pandemic change the types of products that travellers would wish to purchase?

In 2019, at the height of tours and activities, self-guided tours was the biggest-growing sector at that time, and that was before the pandemic. That trend is only going to be intensified in 2021 and beyond because travellers will be looking for a more intimate, private experience, partly due to safety concerns.

From those we surveyed, 66.75% would prefer to participate in a self-guided tour with their friends/family and no tour guide. Another 22% would book a private tour with their own tour guide. What may be worrying for some, is that only 11.25% would take a guided group tour.

Going by these figures, it may be imperative that tour and activity businesses in this region or those targeting this travel market start offering a private and self-guided option, if you do not do so already.

We have a number of our own clients who have or are in the process of developing alternative options of their products to cater for this market. In fact, I would encourage any operator to provide a self-guided option as this can provide a passive income. Think about it: you can offer the same product as you currently provide, at a cheaper price, but without the expense of a tour guide, giving you a bigger profit margin.

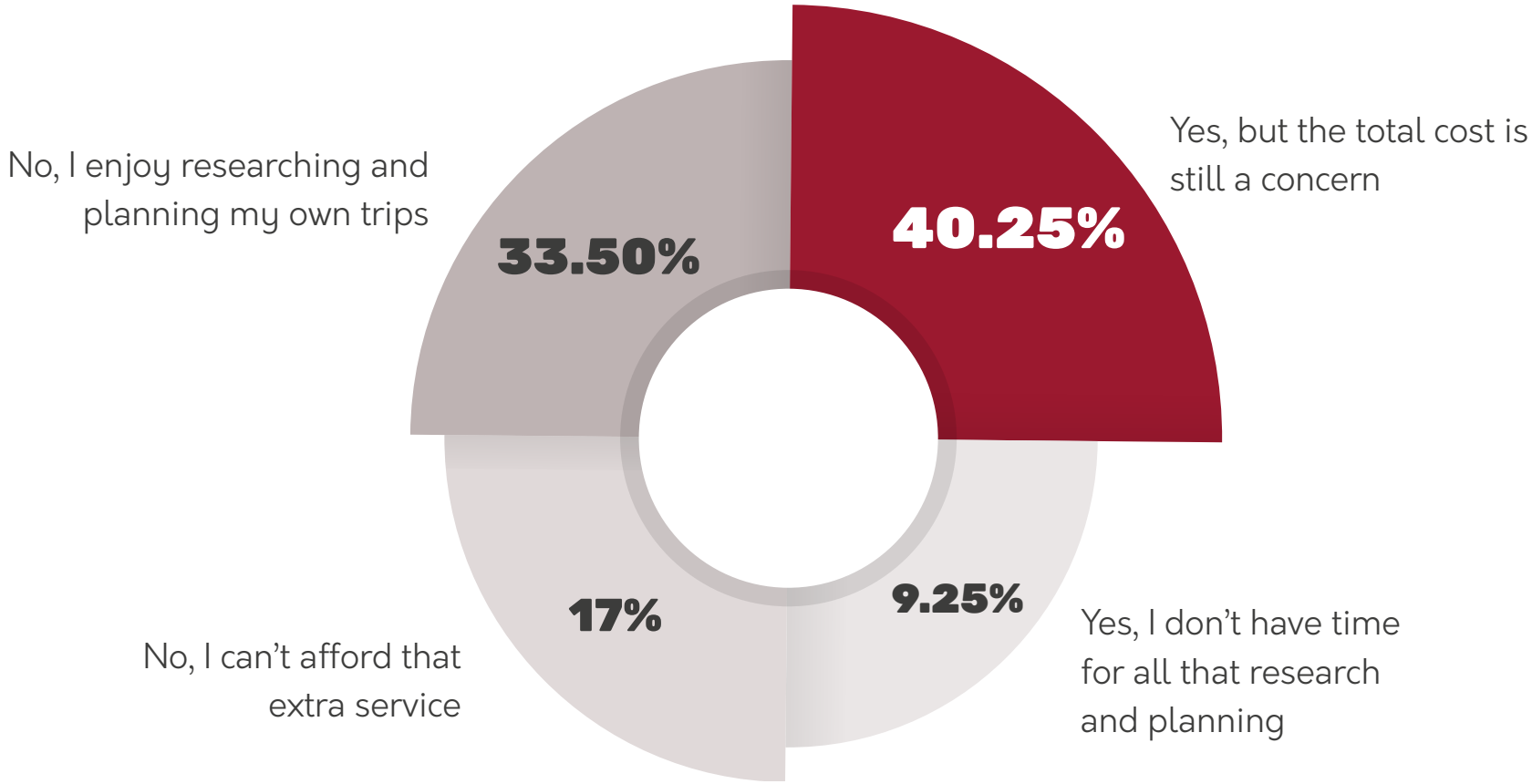
For multi-day providers, you organise every aspect for your customer, booking accommodation, tickets to attractions, transportation, etc, like you normally do, but let your customer take themselves along that journey. You can provide a travel guide to accompany them, or speak to businesses like Clio Muse or Autoura to create an audio or AI guide that can accompany them. One of our clients, Overland Ireland, have even created their own app for their self-drive option.

Day tour companies can also provide self-guided options using these apps and platforms to create a passive income. For me, this is more of a realistic option than the time and effort of creating virtual tours.

And no, this does not mean you are sacrificing your business and consumers will all of a sudden stop taking in-person tours. That will still be a big market. A great experience with a self-guided tour may convince some to try a guided tour further down the line. But, in any case, if both are generating you revenue and — more importantly — a profit, then it's a win-win.

Question Seven

Would you pay more to have everything booked and organised for your trip?



tma. tourism marketing agency

If self-guided and private tours are the most desired by Australian and New Zealand travellers, would they pay more to have everything organised for them?

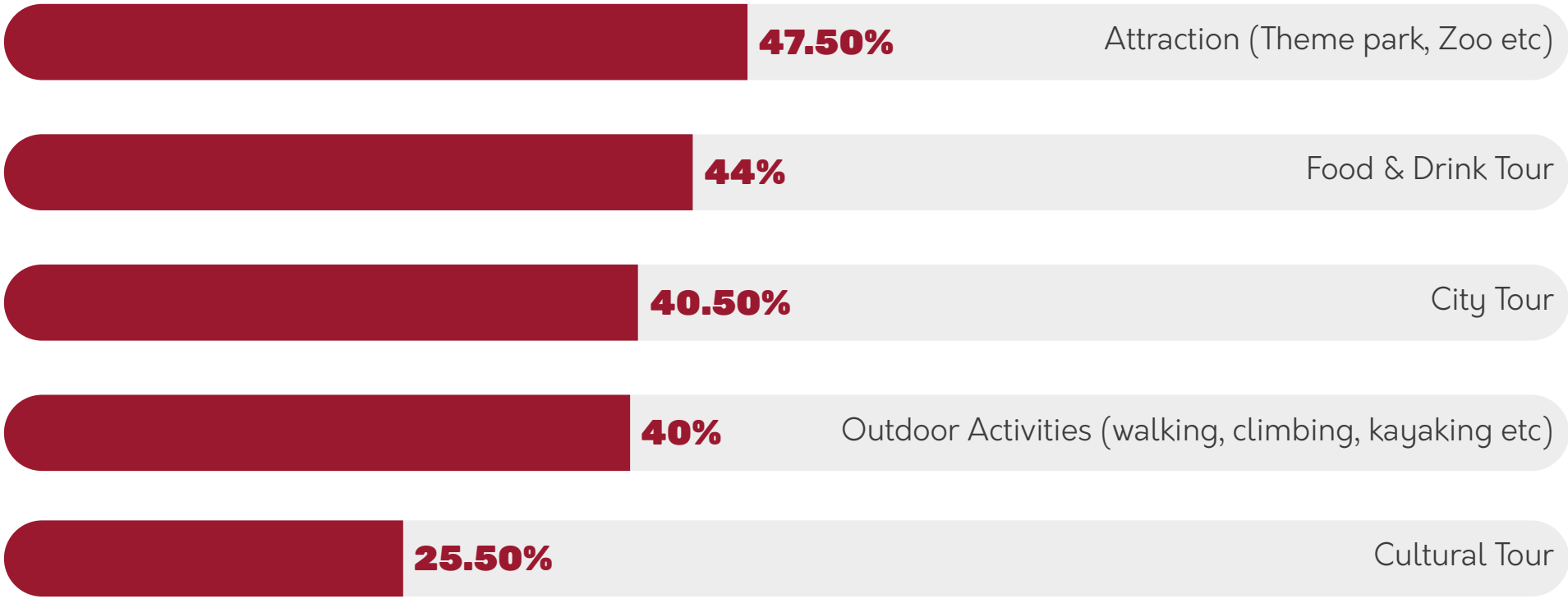
Going by the figures, a combined 49.50% of those asked would pay more, with 9.25% saying they simply don't have the time to do it themselves, and 40.25% saying they would but the total cost would still be a concern. This highlights that nearly half would prefer to have everything organised for them and pay for the privilege, as long as the increase in the cost is not too much. This is a lower percentage than all other markets, and these travellers were also the most likely to enjoy doing all the research and planning for themselves, at 34%.

Have a think about what has happened over the last 12 months. We have all been 'stuck' in limbo and a good majority of travellers would pay a premium just to experience 'something' again. That AUD$120 day tour that might have put someone off before may seem more attractive now as people will just say 'screw it, I want to have some fun again'. Play on this aspect in your marketing and, whatever you do, do not reduce your prices! I know some disagree with me on this but I feel travellers will pay a little more than the normal asking price just so they can experience something again.

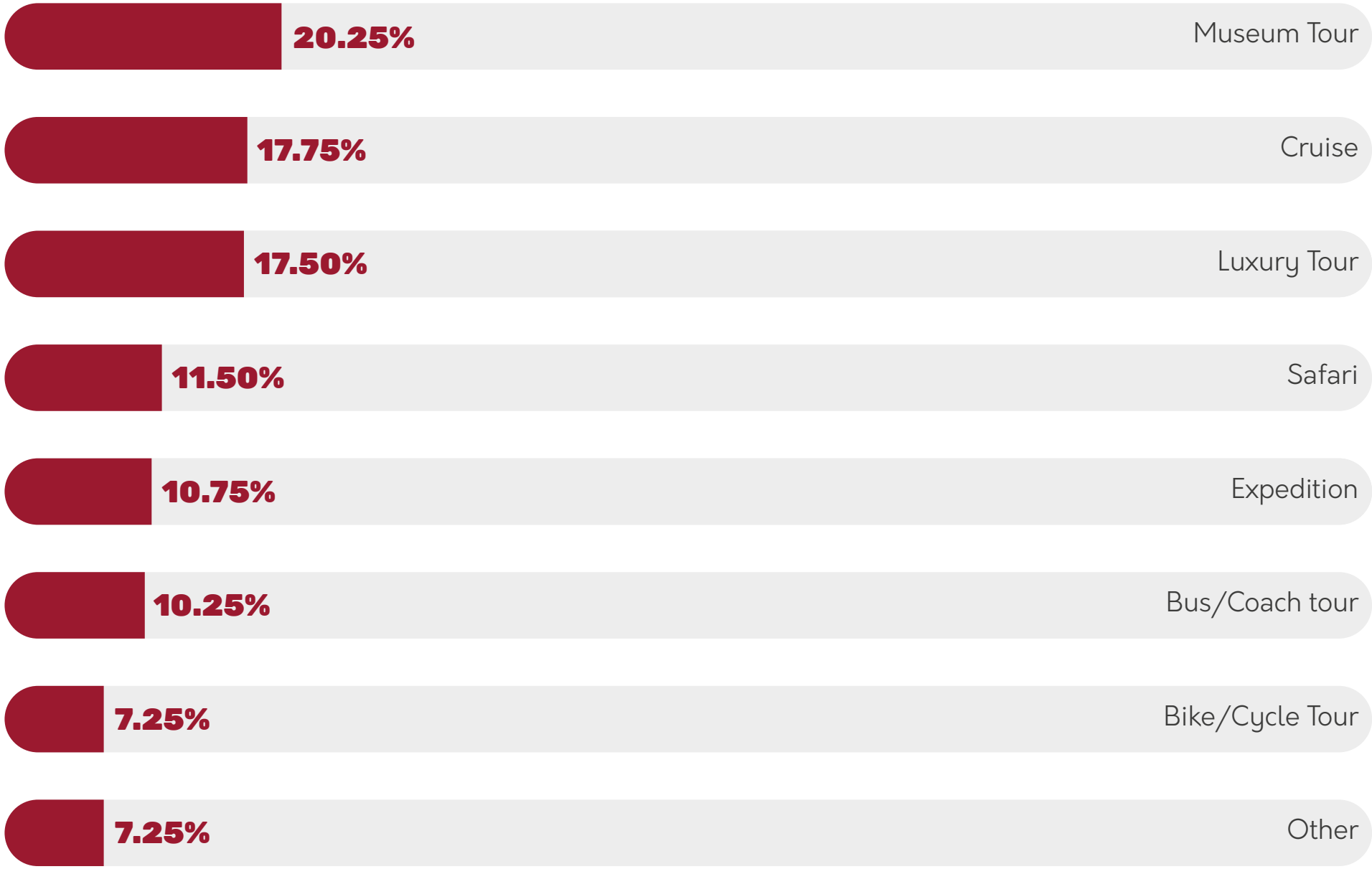
Do however take into account that a combined 50.5% still prefer to research and do all the organising themselves, or they assume they can't afford to pay for that type of service. This is why it is very important to have private, self-guided, and guided options on your tours at varying prices and varying number of hours/days.

Question Eight

Which tour or activity are you most looking forward to once travel opportunities are available again? (select your top 3)



tma. tourism marketing agency


20.25%
Museum Tour
17.75%
Cruise
17.50%
Luxury Tour
11.50%
Safari
10.75%
Expedition
10.25%
Bus/Coach tour
7.25%
Bike/Cycle Tour
7.25%
Other

So we have established that most travellers are looking for local/domestic travel, short weekend or week-long breaks, and self-guided tours, but what type of tours are they interested in? We asked for their top three.

Overall, attractions are the most desired, closely followed by food and drink, city tours, and outdoor activities.

What I do find very interesting is, despite still being a high percentage, outdoor activities are not number one on the list as these destinations are prime for outdoor activities such as surfing, walking, and climbing.

Like the worldwide average, once again bus/coach tours are way down the list of priorities. Again, this will be for a few reasons, one being the thought of sitting inside a vehicle with complete strangers and the health and safety aspects of that. Remember, however, that the preference for travellers is self-guided or private tours, so taking their own transport or hiring a vehicle for their own use will be more attractive. That's great news for campervan and motorhome providers.

I am not surprised food and drink tours are high on the list as this is a great way to bring people together, and it was a growing market pre-covid.

For those who said 'other', there was a clear trend of wanting to visit family and friends. As you can imagine this is very important to a lot of people so creating products that caters for family get-togethers may be an option for some.

Some of the 'Other' entries entered in our research....

- Beach Holiday
- Camping
- Caravan
- Contract Bridge Cruise
- Fishing
- Getting Together With Family
- Motor Sport
- Outback Nature Tour
- Relaxation
- Road Trip
- Seeing Friends
- Self Exploration
- Skiing
- Walking
- Zoo

Question Nine

If you could travel to any country by the end of 2021, which country would that be?

Top Ten Destinations

tma. tourism marketing agency

This was an open-ended question to help get a feel of the consumer's desired destination if given the choice to travel to any country or region. It's handy for those who attract international customers and interesting to see the differences based on the region of survey responses.

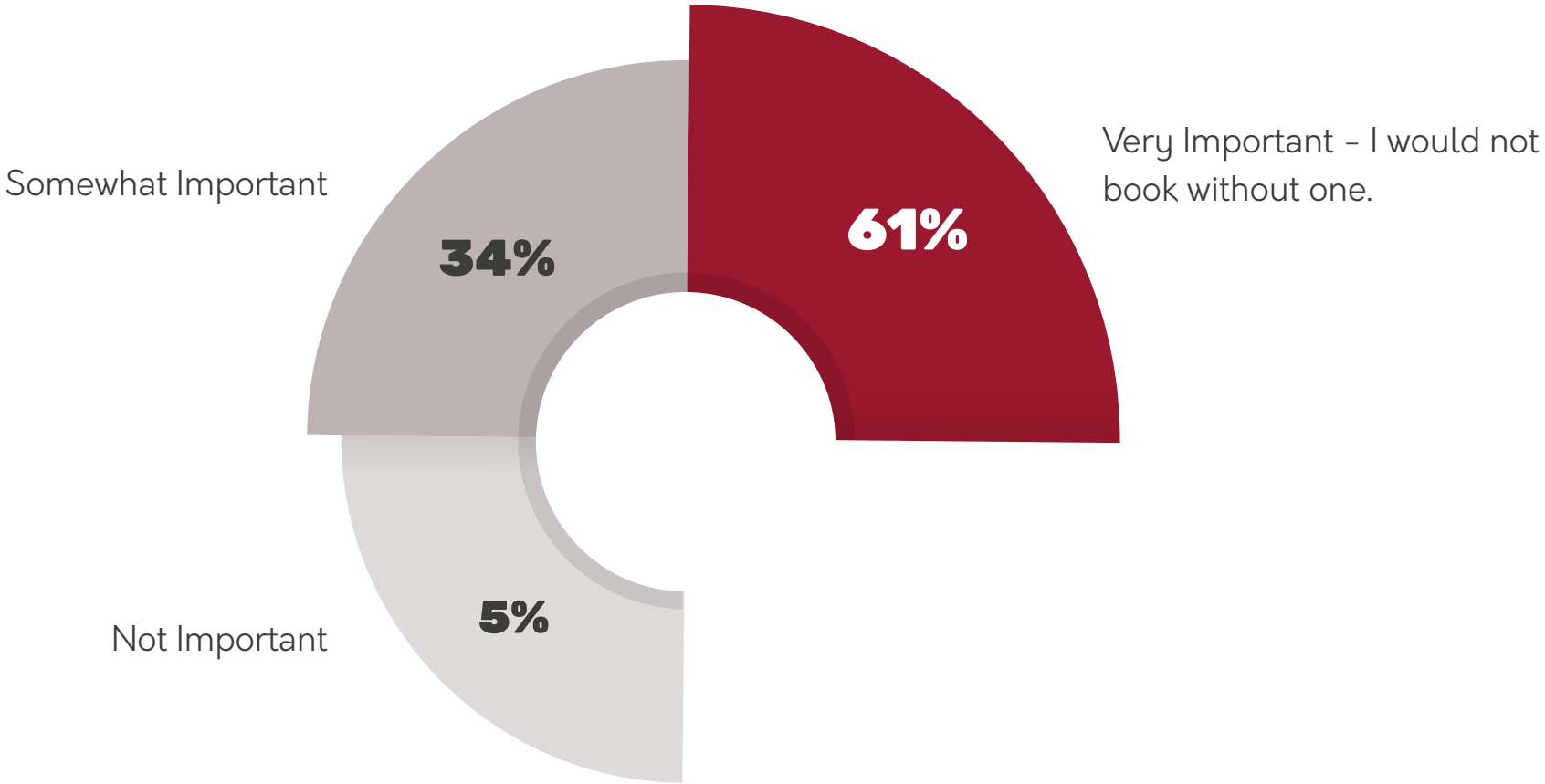
For travellers in Australia and New Zealand, Japan was the most desired destination, which is not surprising given the close proximity to the location. New Zealand and Australia were both in the top five, which was predictable, and the USA and Canada also in the top five.

While this list does not show destinations that those from Australia or New Zealand can travel to currently, it does provide some insights into travellers' desired destinations that can help inform your marketing. Targeting specific travellers to book for later in 2021, 2022, or 2023, depending on the vaccination rollout as highlighted in the map, may be an option for some of you.

If you are in New Zealand, for example, focusing on a week-long break, targeting those within Australia with a private or self-guided product may be what attracts a good majority of this demographic. If you are trying to attract these travellers to your international destination, it may be a while yet, but the traditional popular destinations are still showing up strong.

Question Ten

How important is a Covid Guarantee Policy in your booking decisions? (for example, a policy that allows you to move dates or offer full/partial refunds etc)



tma. tourism marketing agency

With this question I wanted to highlight how important it will be for your business to have a Covid Guarantee Policy or some form of flexible terms.

The numbers speak for themselves: 61% of travellers will not even book with a company if they do not have one. That is a huge number and it's why I urge you to make sure you have flexible terms and that you display them prominently on your website and in your marketing materials.

A further 34% said it is somewhat important, so flexibility will still be massively important to those more willing to book. A policy is more likely to persuade them to book with you over someone who does not offer one. This is a combined 95% of travellers who would expect some form of flexibility when booking a travel-related product.

You must provide flexible booking terms to give consumers confidence in your business. By not providing flexible terms gives the impression that you do not care about their fears.

If you are a multi-day operator, think about allowing travellers to pay a small deposit with the rest payable 30 days before the start date, or even a subscription over a period of time to help generate regular income for you and your business. Allow the traveller the ability to easily change dates as many times as necessary.

For day-tour operators, why not offer to reserve a spot for free, or 50% upfront and the rest 24 hours prior to start date. Again, allow them to easily change dates as many times as necessary.

Even when Covid is a distant memory, travellers will not go back to how it was. They will expect and demand the same treatment, so more flexible terms are here to stay. Bear that in mind for the future of your business and marketing strategies.

We shall now highlight key audience demographics of those who participated in this research.

Careers

Other	22.00%
Retail	9.50%
Homemaker	8.50%
Healthcare and Social Assistance	8.00%
Education	7.75%
Finance and Insurance	4.75%
Construction	4.75%
Hotel and Food Services	4.00%
Government and Public Administration	4.00%
Information - Services and Data	2.75%
retired	2.75%
Manufacturing - Other	2.50%
Arts, Entertainment, or Recreation	2.00%
Transportation and Warehousing	1.75%
Software	1.75%
Agriculture, Forestry, Fishing, or Hunting	1.75%
Energy/Utilities/Oil and Gas	1.25%
Personal Services	1.25%
Legal Services	1.00%
Scientific or Technical Services	1.00%
Consulting	1.00%
Information - Other	1.00%
Automotive	0.75%
student	0.75%
Real Estate, Rental, or Leasing	0.50%
Telecommunications	0.50%
Manufacturing - Computer and Electronics	0.50%
Fashion/Apparel	0.50%
Marketing/Sales	0.50%
Broadcasting	0.25%
Advertising	0.25%
Military	0.25%
Wholesale	0.25%

Business/Job Role

Prefer not to say	30.25%
Other non management staff	21.75%
Middle Management	9.25%
Administrative/Clerical	7.50%
Sales Staff	6.00%
Owner or Partner	5.50%
Technical Staff	5.00%
Supervisor	5.00%
Senior Management	1.75%
Project Management	1.25%
Buyer/Purchasing Agent	1.00%
President/CEO/Chairperson	1.00%
Business Administrator	0.75%
Director	0.50%
Chief Technical Officer (CTO)	0.50%
HR Manager	0.50%
Supply Manager	0.50%
Chief Financial Officer (CFO)	0.50%
Craftsman	0.50%
C-level executive	0.50%
Product Manager	0.25%
Foreman	0.25%

Education

University	32.75%
High school	29.25%
Vocational/Technical college	24.50%
Post-graduate	11.50%
Middle school	2.00%

Employment Status

Employed for wages	47.00%
Retired	12.50%
Homemaker	10.50%
Student	9.00%
Out of work and looking for work	7.75%
Self-employed	6.75%
Other	2.75%
Out of work but not currently looking for work	2.00%
Unable to work	1.50%
Military	0.25%

Household Income Australia

AU$60,000 - AU$95,999	28.61%
AU$45,000 - AU$59,999	17.17%
AU$30,000 - AU$44,999	12.95%
AU$15,000 - AU$29,999	11.75%
AU$96,000 - AU$119,999	9.04%
Under AU$15,000	7.23%
AU$120,000 and above	6.63%
Prefer_not_to_say	6.63%

Household Income New Zealand

High_I	22.06%
Lower_II	17.65%
Lower_I	14.71%
High_III	11.76%
Prefer_not_to_say	11.76%
Middle_II	11.76%
Middle_I	5.88%
High_II	4.41%

Marital Status

Married	40.75%
Single	30.75%
Living with partner	15.50%
Divorced	5.50%
Separated	3.00%
Widowed	2.50%
Prefer not to say	2.00%

Number of Children

Two	18.75%
None	51.50%
One	14.25%
Three	8.25%
Four	4.25%
Six or more	1.00%
Prefer not to say	1.00%
Five	1.00%

Chris' Summary and Marketing Conclusions

Chris provides his conclusions on this report and general guidance you should consider for your own tour and activity business.

tma. tourism marketing agency

Looking over all the figures from each region, it is clear that travel demand is most certainly there, with the bulk of travellers we surveyed wishing to travel again in some form. But what it does highlight is the shift in the types of products they wish to participate in and how they wish to book

The key takeaways here are the preference for self-guided/private tours in mostly local and domestic destinations, and only booking with those companies with a Covid Guarantee Policy or some other form of flexible terms. This will affect how tour and activity providers not only market their businesses but also the kinds of products and activities they provide.

As advised at the start of this pandemic, those businesses who do wish to stay open and operate will have to seriously think about how they can cater for a domestic market. Short-haul flights are looking promising but, again, we cannot predict exactly when border restrictions will ease and traveller confidence will return.

So what options do you have to reach your audience and market to them?

As stated earlier in this document, there are many free methods by which you can market your business, such as writing content yourself, recording video on your phone, and posting on social media. But, if you can, I would also consider Facebook Ads to drive awareness and enquiries. I say enquiries as our extensive data suggests that more travellers are enquiring rather than booking immediately online, and these enquiries are for later in 2021 and into 2022.

In terms of Google Ads, these can still be very important but mostly at a local/domestic level. Even the large OTAs will struggle in 2021 because the local market is still going to dominate this year and most OTAs don't cater to local markets very well, with the exception of Airbnb. This means that it will be more important than ever for you to build up your direct channels in order to cater for the demand that WILL arise. Don't expect many locals to book activities in their own areas through an OTA. Consumers tend to book directly when close to home and there is also a growing focus on helping local businesses. All of this will play a part so you must prepare for it.

Look at key demographics like the over 60s, who

are more connected online than ever before. Look to families with children and others that are set to be key in many operators' growth going forward.

As Henry Ford once said, **"A man who stops advertising to save money is like a man who stops a clock to save time"** — and he is completely right. Although, nowadays, it should rightfully say "A person who stops advertising to save money is like a person who stops a clock to save time".

There is no excuse not to keep marketing your business, and failing to do so will have ramifications for your business for years to come.

About Chris

Chris is an author, podcaster, and brand & digital tourism expert with over 26 years' industry experience. Chris speaks at many tourism events worldwide, offering his advice and guidance on how travel, tourism, and destination businesses can gain brand recognition and increase bookings.

Chris has focused his business, the Tourism Marketing Agency, on tour operator marketing with over 90% of his client base coming from outside the UK, working with some of the biggest players in the industry.

Chris is the author of the best-selling marketing book, How to Turn your Online Lookers into Bookers, a 400-page book full of practical marketing advice dedicated to the tours and activities sector.

Chris also produces a video advice series called The Digital Tourism Show which you can watch on his Facebook Group, YouTube channel, or listen via Google or Apple podcasts.

Chris is also the leader of Travel Massive Glasgow, in which he runs a monthly event for tourism businesses in Scotland. He has grown this chapter to the second-best chapter in the world, out of approximately 150 chapters.

Chris has won numerous awards over the years, such as the Best Tourism Website, Best Digital Agency, and the Scottish SME's Businessman of the Year 2018.

Linked In Profile
https://www.linkedin.com/in/torreschris

Tourism Marketing Agency
https://tourismmarketing.agency
https://www.facebook.com/tourismmarketingagency

The Digital Tourism Show
YouTube Channel:
https://www.youtube.com/c/DIGITOURSHOW
Podcast Platforms:
https://audioboom.com/channels/4990262

Facebook Group:
https://www.facebook.com/groups/digitaltourismshow

Travel Massive Glasgow
https://travelmassive.com/chapters/glasgow
https://travelmassive.com/leaderboard

Touriosity - Commission free OTA
https://touriosity.travel

Join our family

Would you like to have our team conduct research for your own business or do you want help marketing your business more effectively?

We have many options for small and large tour and activity providers to aid you in defining your target audience, creating content, writing a Covid Guarantee Policy or managing paid advertising or social media.

If you would like to know more, please do click here to submit your enquiry or email chris@tourismmarketing.agency.

tourism
marketing
agency

"We worked with Tourism Marketing Agency to complete some market research and strategic analysis regarding our new website launch and company expansion plans. The audit and report they completed was very thorough with actionable insights. They also took the time to meet with us for a call to discuss the insights, provide additional background information and clarify all the items."
Alicia Ward - SeeSight Tours

"I started working with Chris and his team just recently, but their advice and insight have been invaluable. They are very responsive and easy to communicate with, which is crucial in these challenging times. The amount of free advice that Chris generates is astounding and especially valuable for small tour business operators like myself."
Manuela Dimitrova - Excedo Travel

"Chris and his team go above and beyond to give advise and provide the best marketing services that will help any business in these tough times. His insight and knowledge of the tourism industry is second to none. I highly recommend the Tourism Marketing Agency."
James Thomas - Rosehill Tarvel

"Chris, Cameron and the team have been greatly supportive from start to finish, especially during the Covid-19 crisis, helping to maintain our marketing needs during this time. Chris responds quickly with every question we have and assists with new ideas to grow our business. We are extremely thankful and hope to work with the team for many years to come. Thanks TMA!"
Nicola Holland - Horizon Sail

Tourism Marketing Agency
The Garden Room
25 Polnoon Avenue
Glasgow G13 3HQ
Scotland

hello@tourismmarketing.agency
+44 20 3920 9135

5.0 Google Rating
Over 100 Five Star Reviews