

The travel intentions of the Belgian travellers “pre-corona” & “during corona”

GTIR : GfG Travel Intentions Report

Quarterly report since august 2019

Online press conference June 12th 2020



Powered by



Executed by



Practical guidelines for an efficient online press conference

- Please mute your microphones not to disturb the conference
- Please switch of your camera's for better internet connections
- Put your questions in the chat box, Q&A is at the end.

Agenda : press conference

Speakers : Mark De Vriendt – managing director GFG

Pierre Fivet – manager travel researches Board ABTO

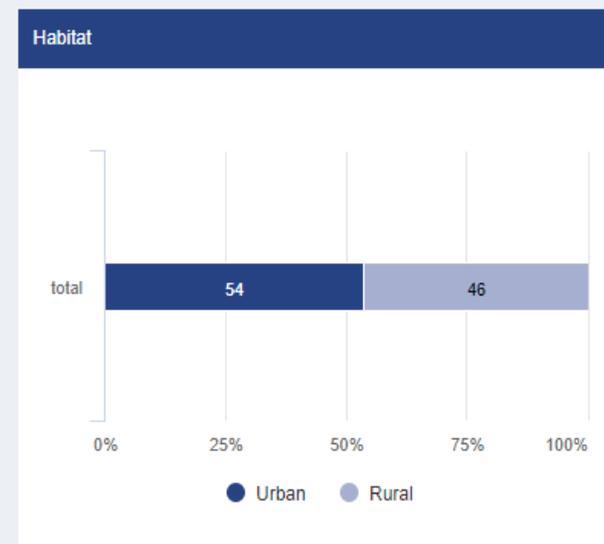
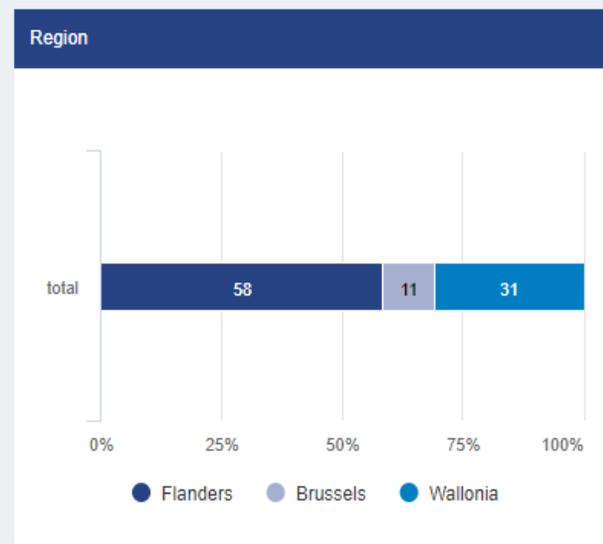
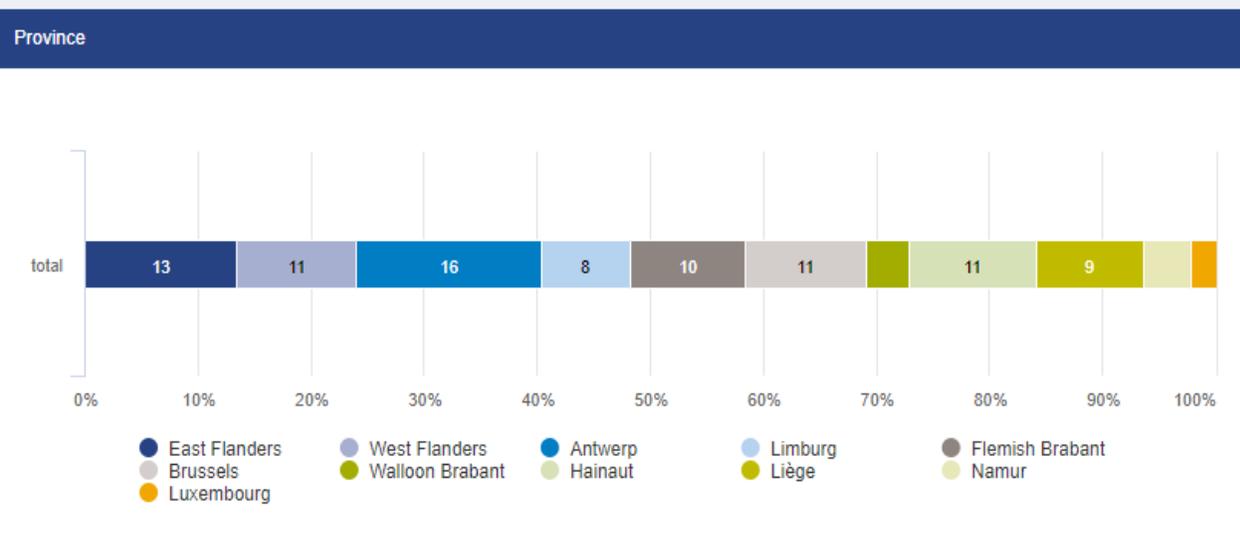
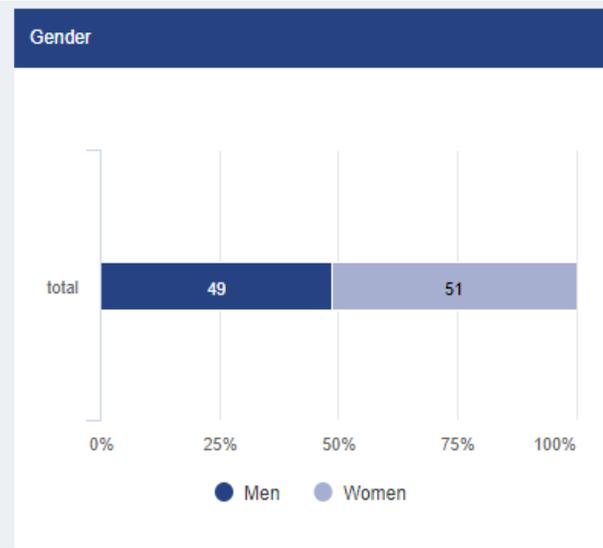
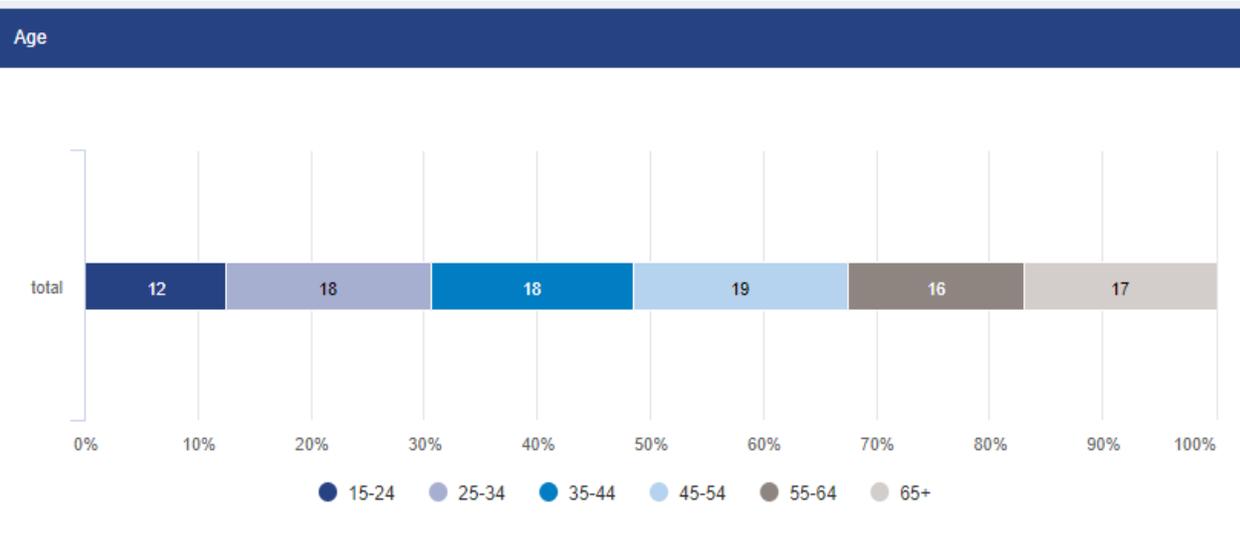
- 5 min : Introduction : Mark De Vriendt
- 5 min : Definitions & methodology : Pierre Fivet
- 20 min : Travel intentions of the Belgian travellers
“pre-corona” & “during corona” : Pierre Fivet
- 5 min : Importance of insolvency protection
during Corona Crisis : Mark De Vriendt
- 10 min : Q & A

Definitions & methodology GTIR

- Compared in this presentation are the research waves :
 - Pre Corona : Q3 & Q4 2019 (aug & nov 2019) and Q1 2020 (feb 2020) : n = 2588 respondents
 - During Corona : Q2 2020 (week may 15th 2020) : n = 858 respondents
- The GfG Travel Intentions Report (GTIR) reveals the travel intentions people have in the coming 24 months.
- Planning to go on a trip but haven't booked anything yet for this trip.
- Every quarter, 850 Belgians are questioned who go on a holiday at least once every 3 years
- If not, we ask about the reasons why they don't have any intentions.
- A holiday is minimum 1 night abroad (Belgium or foreign country)
- Both organized as non-organized travel market
- Representative for the Belgian population

Representative for the Belgian population

age, gender, social class, province and habitat

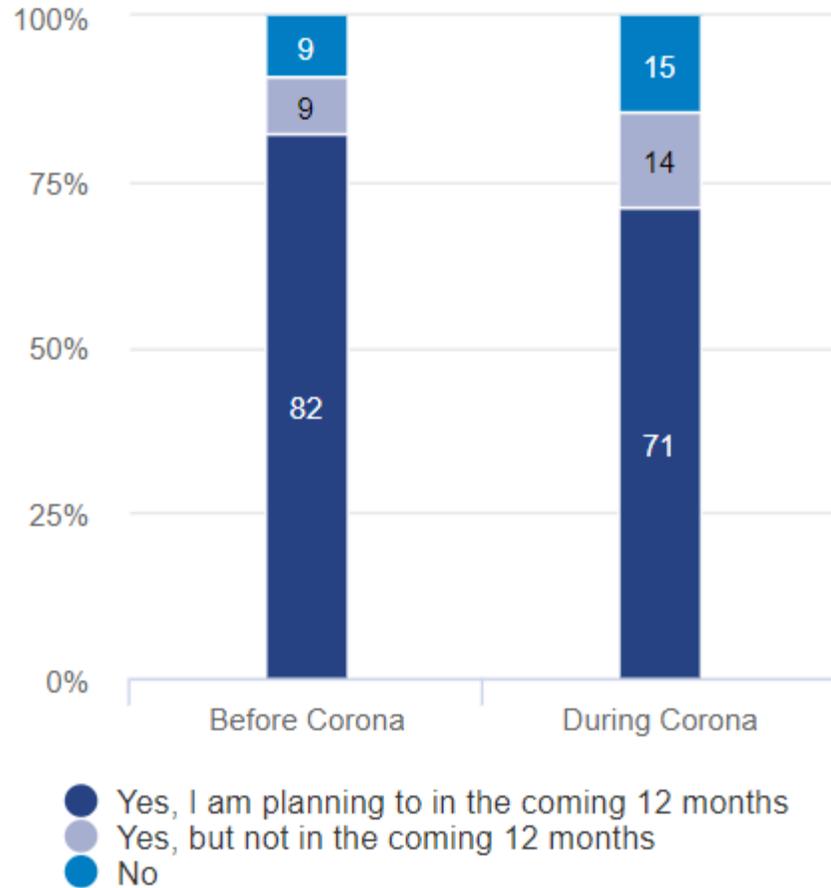


General intentions to travel

Booking plans are postponed to later departure date

15% has no travel plans in next 24 months

Intentions to travel

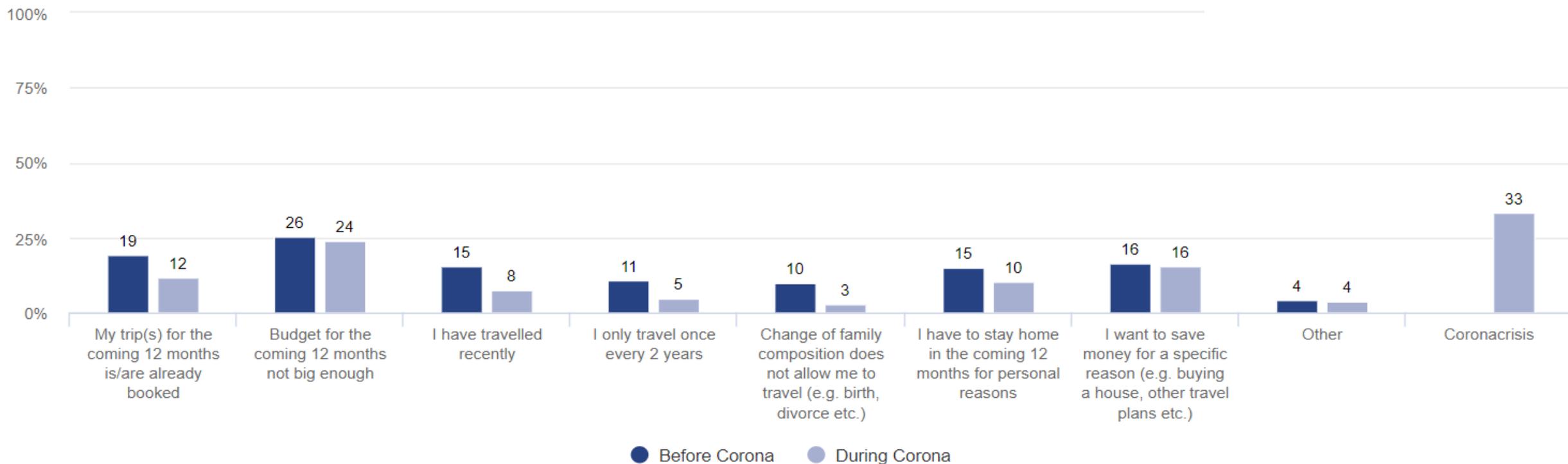


Booking plans are postponed to later departure date 15% has no travel plans in next 24 months

- Within 24 months : **increase** 9% to 14%
- Within 12 months : **decrease** 82% to 71%
--> but still 71% within 12 months
- No travel plans : **increase** from 9% to 15%
--> **but still "only" 15%**

Question: Are you planning on going on a trip for at least one night in the coming 24 months (besides the trip(s) you already booked)?

Reasons for not having an intention in coming 12 months



Question: Why aren't you planning to go on a trip in the coming 12 months? ←

Main reason for no more booking plans (33%) became “Corona crisis” related

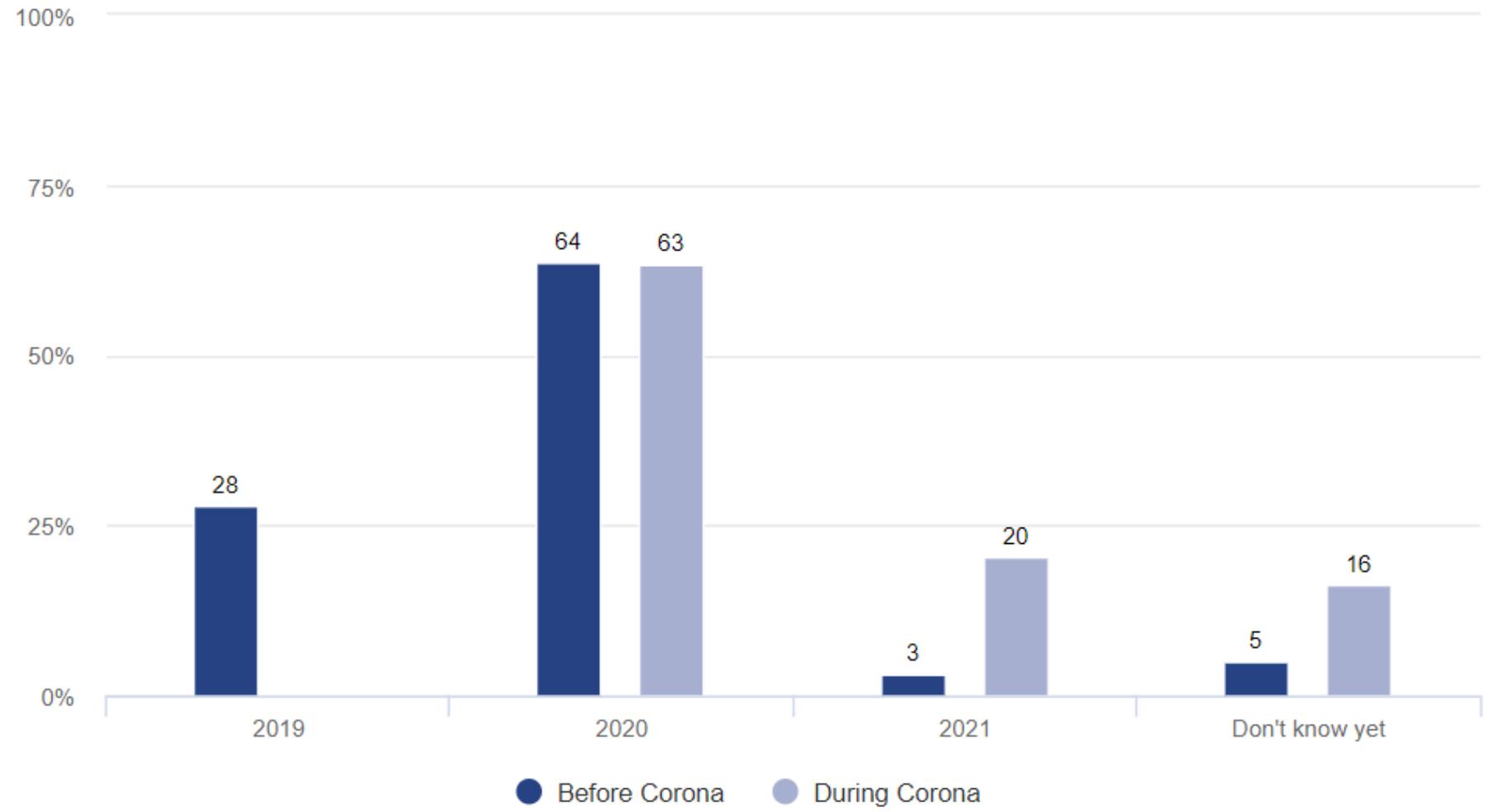
Not enough budget remains +/- SQ and seems not to be the main reason in the evolution

- Plans on 24 months = 30% Corona Crisis related

Booking intentions : when will you book ?

The booking will be postponed due to uncertainty and Impact of Corona voucher in organised travel

Year of booking



The booking year will be postponed.

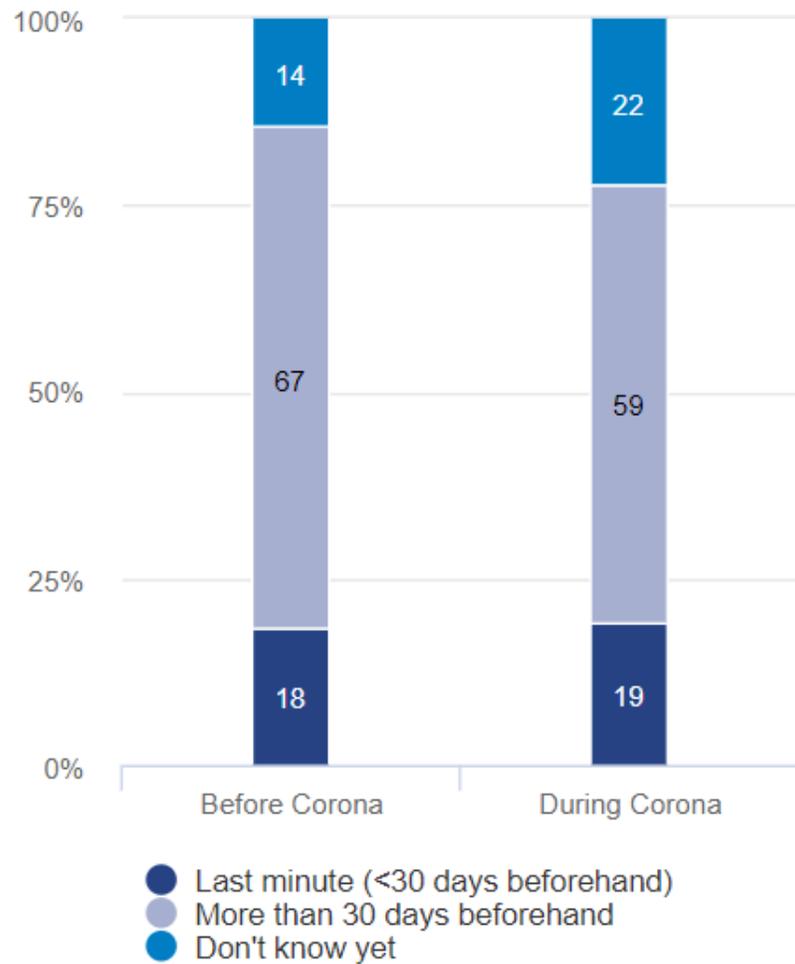
2021 : from 3% to 20%

Uncertainty :

16% do not know when they will book

Impact of Corona voucher (valid until 2021)

Question: In which year will you book your trip? ←



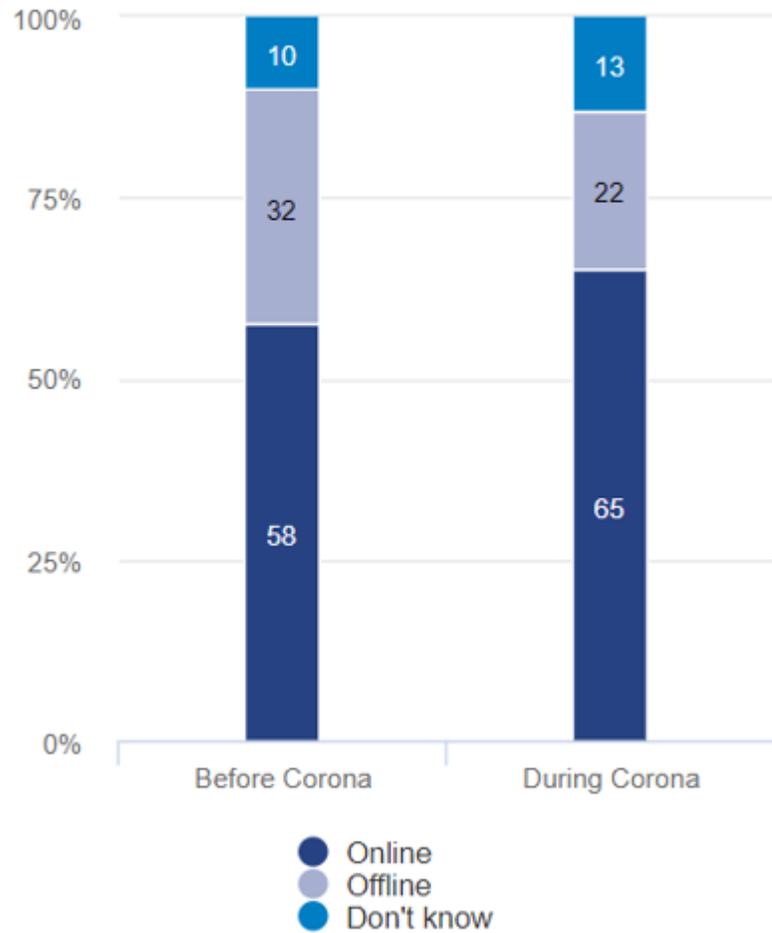
Lastminute bookings (less then 30 days before departure)

- Not increasing
- But still a lot of uncertainty : from 14% to 22%
= big potential $19\%+22\% = 41\%$



Question: How much in advance are you planning on booking your future trip?

Booking trip



More online bookings since Corona

- More online “habit’ due to Corona (shopping, videoconferences ..)
- Travel agencies closed
- Other ways of travelling (rentals, car holidays ... see further)

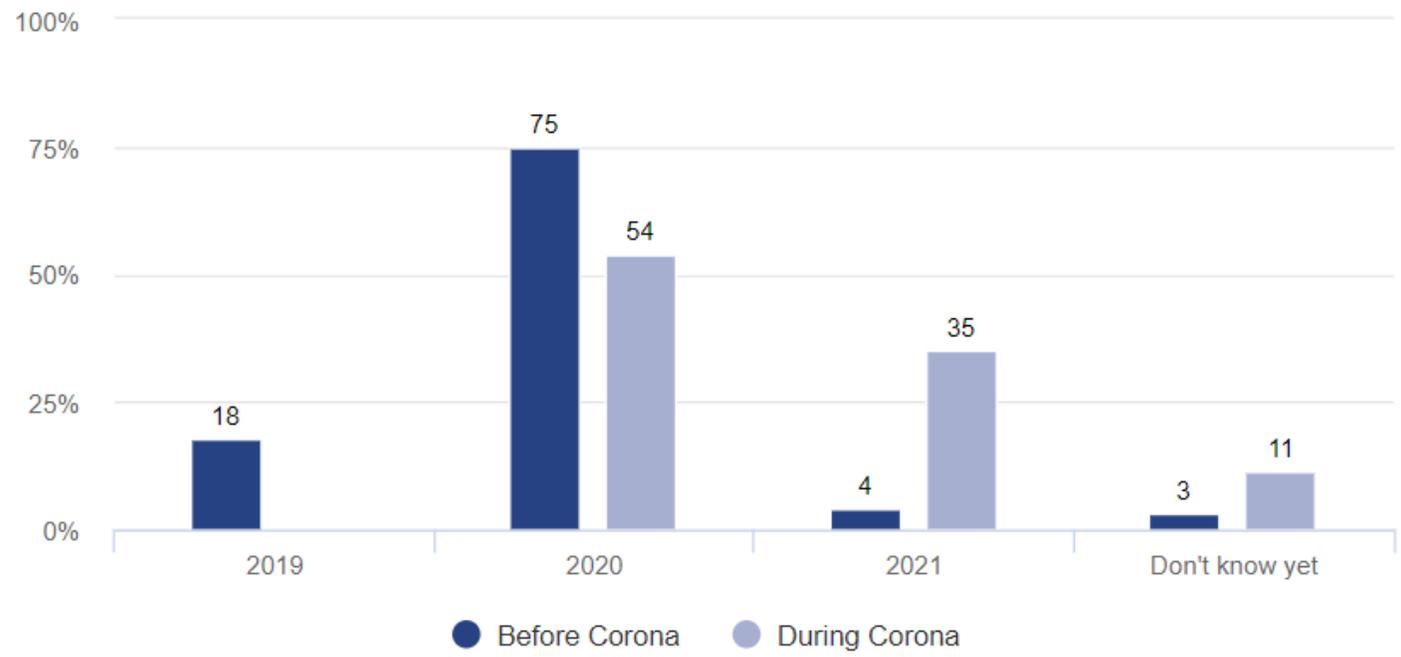
→ Question: How do you plan to book your trip?

Departure intentions : when will you travel ?

Just as the booking date, departure dates postponed to 2021 up to 35% due to uncertainty and impact of “Corona voucher”

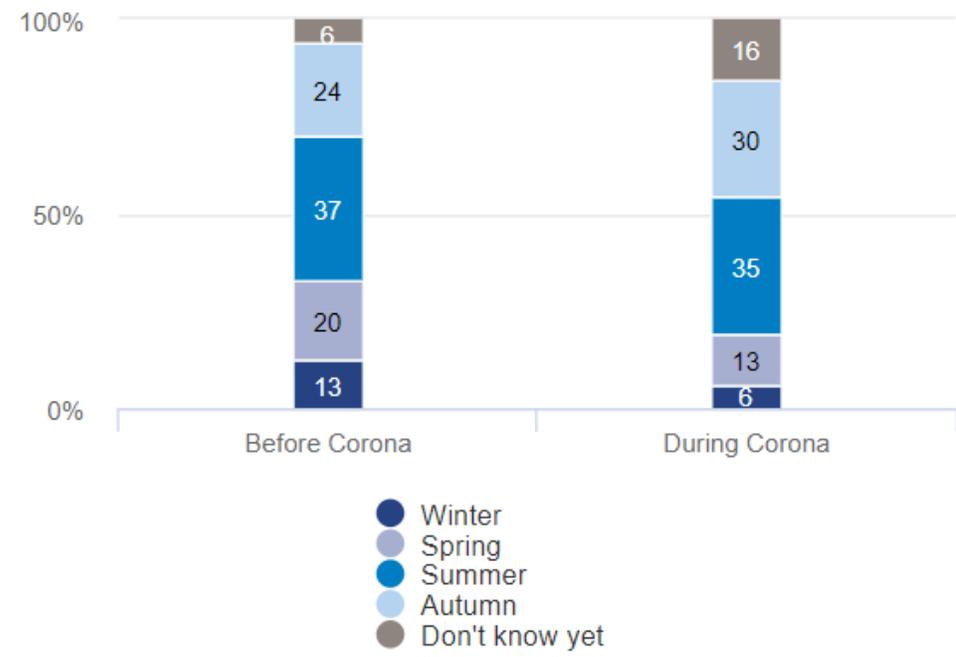
Departure dates in 2020 shift to late august for summer holidays and to autumn

Trip falls in ...



Question: In what year will this trip take place? ←

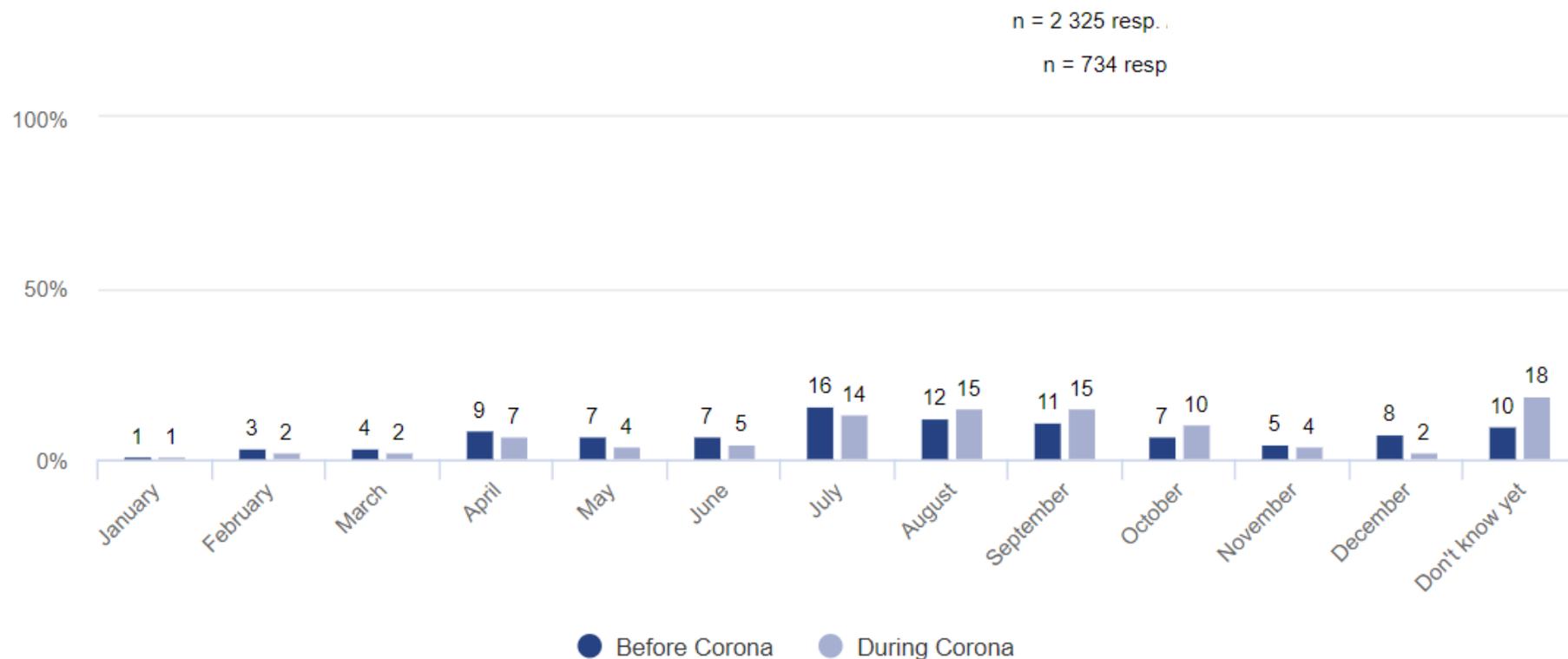
Season



→ Question: In what season will your trip be?

Departure dates postponed to 2021

- Same effect as booking date : impact of “Corona voucher”
- Still a lot of uncertainty : 11% will travel but doesn't know when, and 16% not in what season
- Departures in autumn will increase



Month	Before Corona %	During Corona %
July – first two weeks	6.94	5.65
July – last two weeks	8.58	8.06
August – first two weeks	6.23	6.69
August – last two weeks	5.90	8.32

Question: In what month will your trip be? ←

Departure dates are shifting

- To september and october (autumn break !)
- Shift in summer holidays from first “2 weeks july” to last “2 weeks august” = a-typical for Belgian market
- Still a lot of uncertainty : 18% doesn't know

Intensions destinations ? Which country ?

Traveling in Europe will increase from 67% to 72%

Although losing market share France remains the most popular holiday country

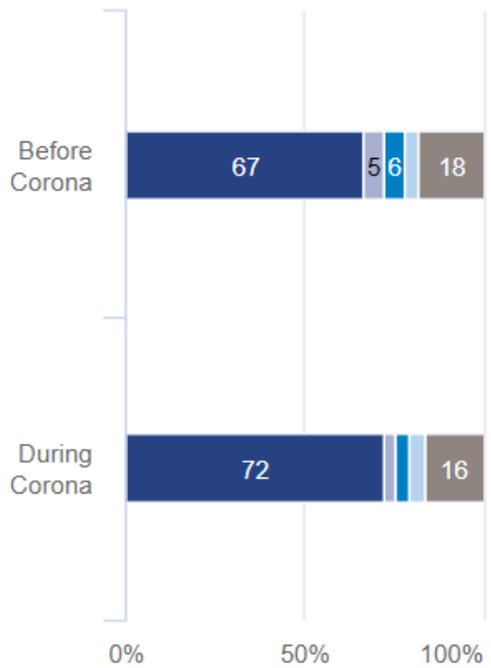
Staying in Belgium will increase : but still “only 14%”

No major evolution in “destinations not considered” due to Corona

Not considered due to “health hazard” is high in the popular foreign destinations : France, Italy and Spain

Destination continent

Destination country



Question: Continent ←

Country	Continent	Before Corona % overall	During Corona % overall
Belgium	Europe	9.76	13.88
France	Europe	14.59	11.83
Spain	Europe	11.38	9.59
The Netherlands	Europe	4.64	8.09
Italy	Europe	3.89	3.65
Greece	Europe	3.28	3.55
Portugal	Europe	1.96	3.11
Other European destinations	Europe	0.94	3
United States	America	1.36	2.49
Tour of European destinations	Europe	1.27	2.3
Other non-European destinations	Other	2.03	2.27
Germany	Europe	4.73	2.24
Austria	Europe	2.56	2.21
Turkey	Asia	1.58	1.92

Traveling in Europe will increase : 67% to 72%

Staying in Belgium will increase : 10% to 14%
But still “only 14%

The Netherlands (nearby) big increase

No major evolution in “destinations not considered” due to Corona (except China)

Major holiday destinations (France, Spain, Italy) not even in top-40 list (but still affected ... see further)

1/2

	% Before Corona	% During Corona
Israel	25.07	25.80
Senegal and Gambia	24.88	28.21
Namibia and Botswana	24.85	28.70
Jordan	24.68	26.93
Kenya and Tanzania, Zanzibar	23.09	24.13
Morocco	21.58	22.33
China	21.17	24.85
India	21.11	22.53
Tunisia	20.01	21.77
Turkey	18.94	18.25
Egypt	17.48	16.91
South Africa	15.78	16.99
Japan	15.46	17.32
Thailand	14.95	16.40
Other Asian destinations	14.08	15.88
La Reunion	12.43	12.26
South America	12.08	13.07
Seychelles	11.67	12.38
Central America	11.44	12.90
Mauritius	9.3	9.44

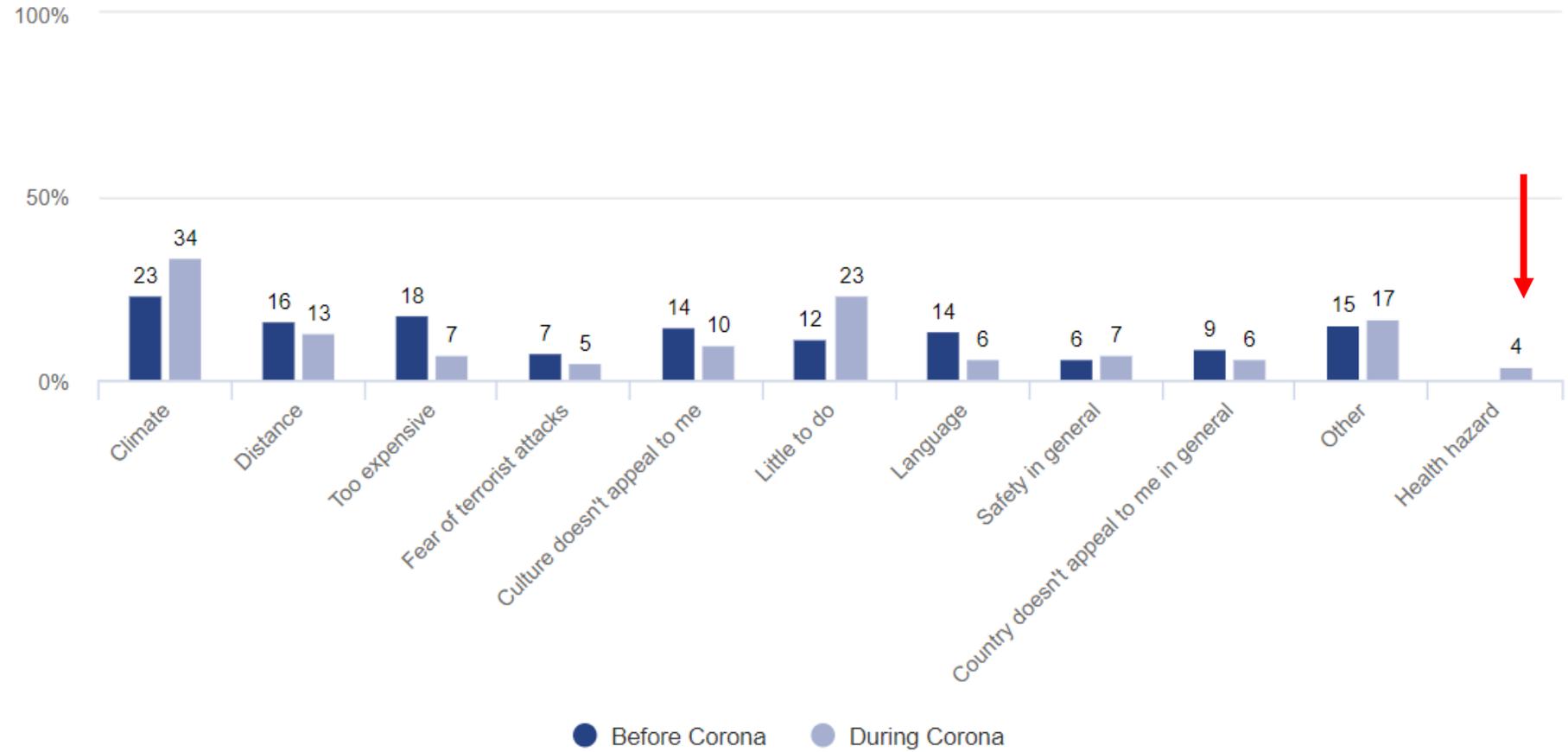
Destinations that are not considered

2/2

	% Before Corona	% During Corona
Baltic states	7.56	8.86
Hungary	7.2	7.43
Poland	6.93	7.76
Other non-European destinations	6.69	7.58
Iceland	6.6	6.87
Tour of non-European destinations	6.4	7.50
Canada	5.76	6.54
Cyprus	5.47	4.58
Croatia	5.11	4.91
Finland	4.67	5.97
Andorra	4.26	4.73
Denmark	3.99	4.04
Malta	3.99	3.96
Norway	3.91	4.33
Austria	3.75	4.10
United Kingdom	3.63	3.59
Sweden	3.34	5.13
Tour of European destinations	3.23	4.81
Grand Duchy of Luxembourg	3.2	3.68
Greece	2.93	3.04

Belgium

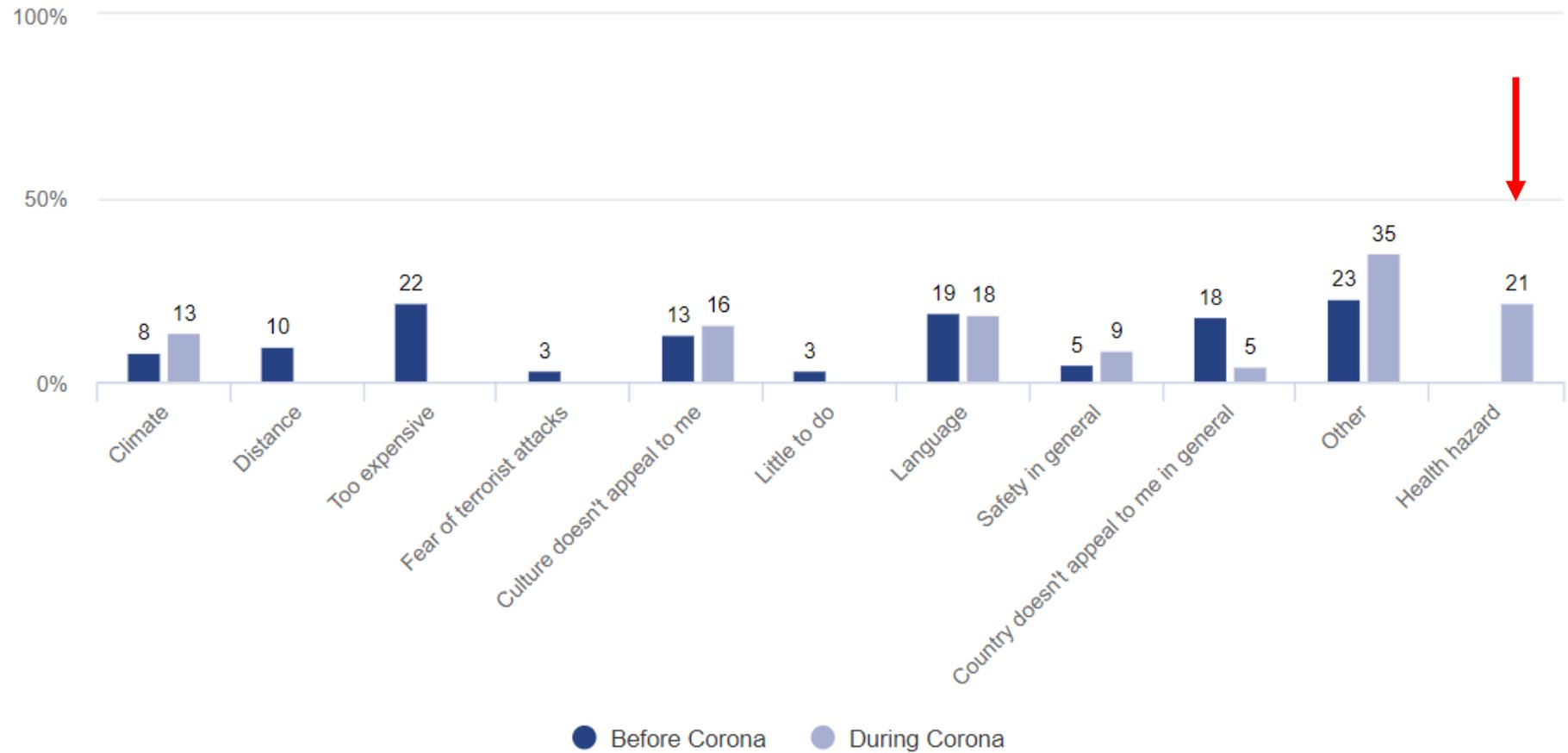
Reasons for not considering a country



Question: Why wouldn't you consider this country?

France

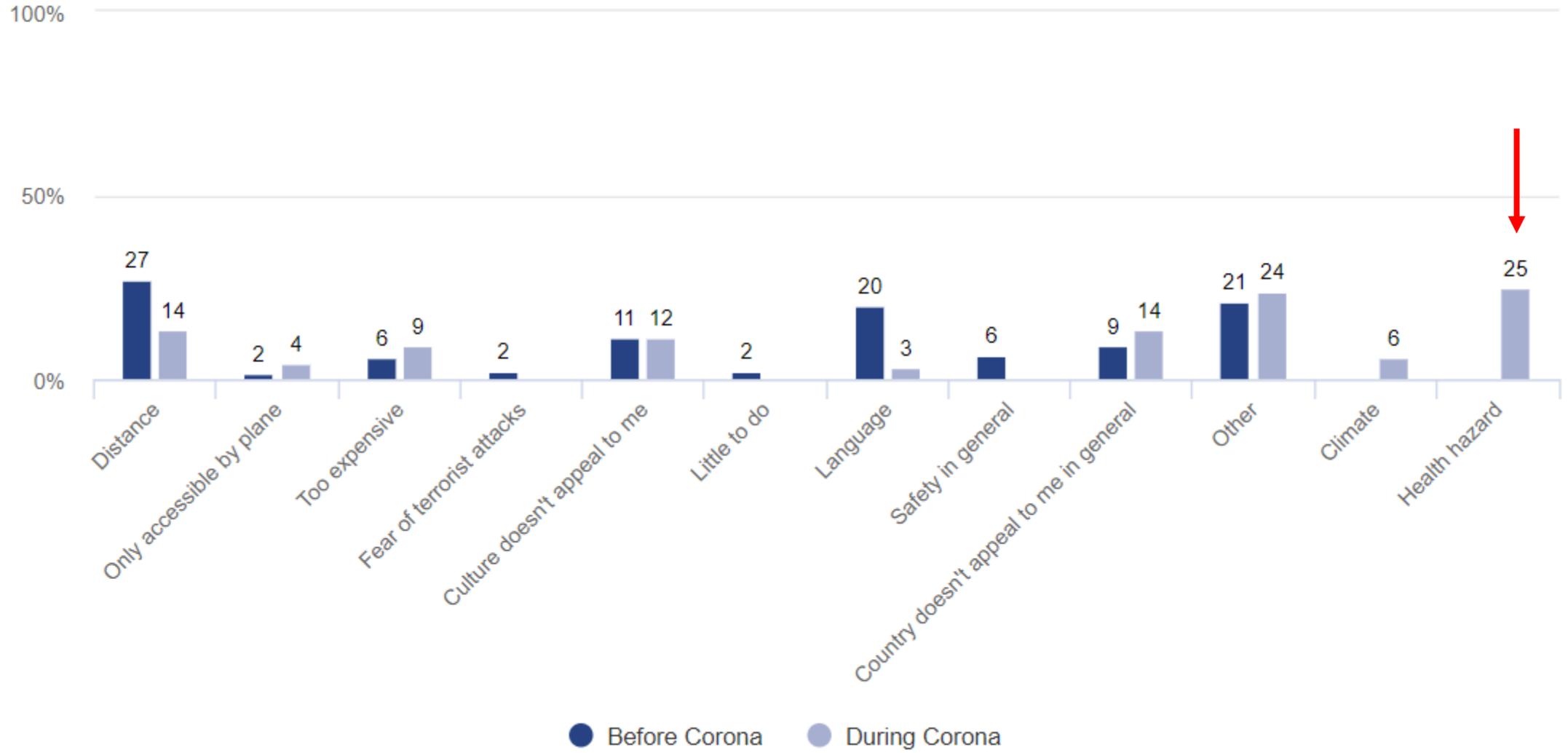
Reasons for not considering a country



Question: Why wouldn't you consider this country?

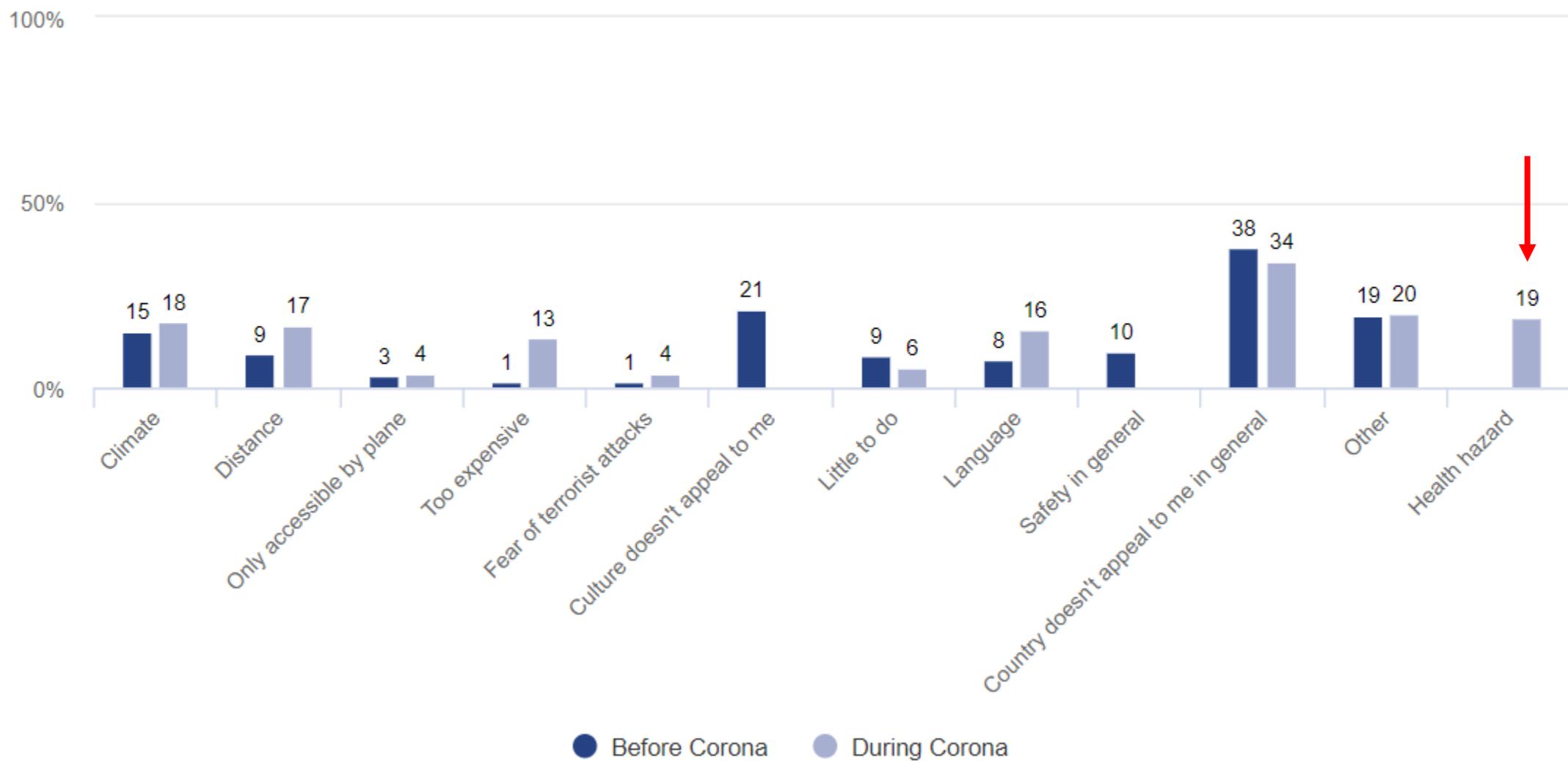
Reasons for not considering a country

Italy



Reasons for not considering a country

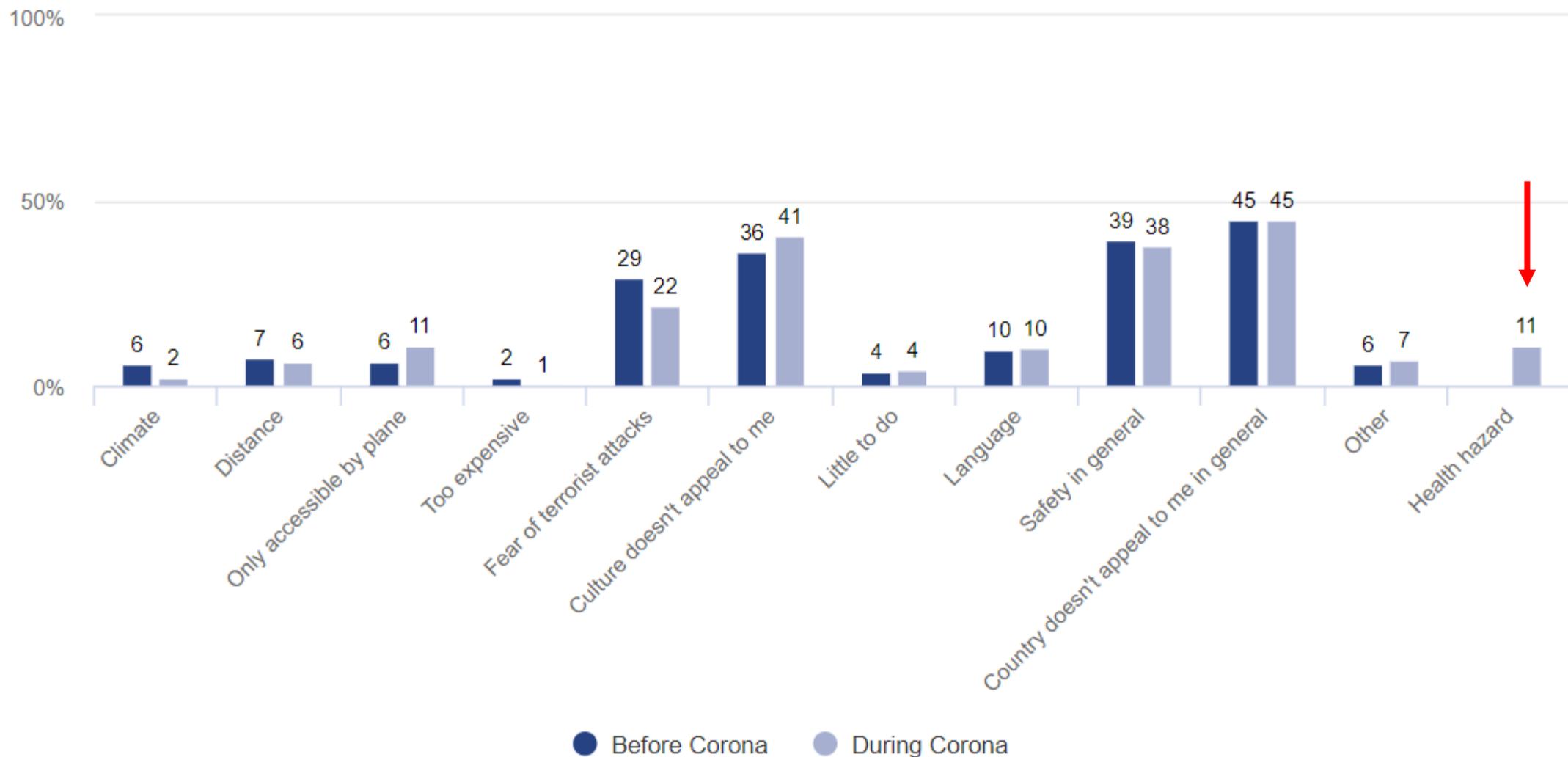
Spain



Question: Why wouldn't you consider this country?

Reasons for not considering a country

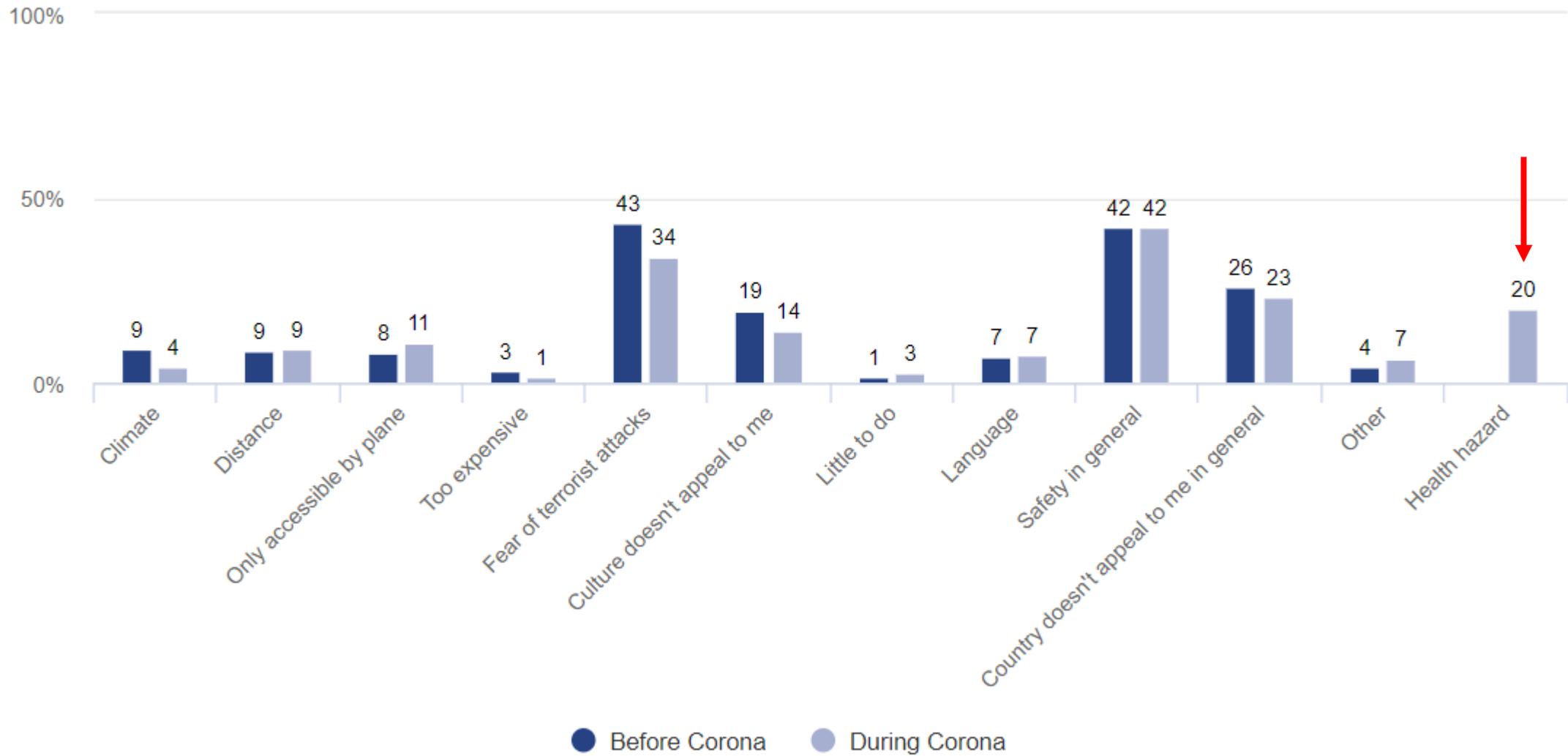
Turkey



Question: Why wouldn't you consider this country?

Reasons for not considering a country

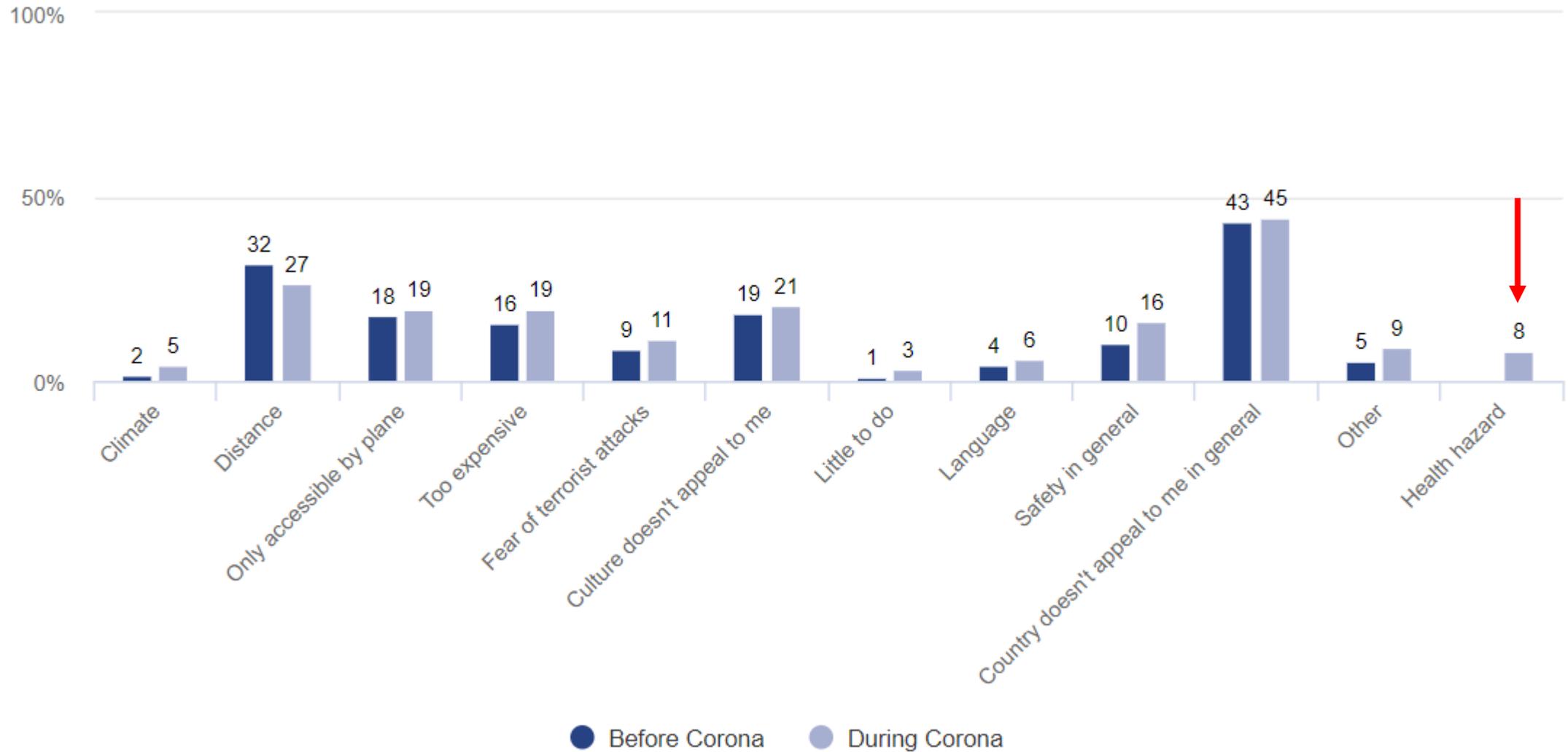
Egypt



Question: Why wouldn't you consider this country?

Reasons for not considering a country

USA



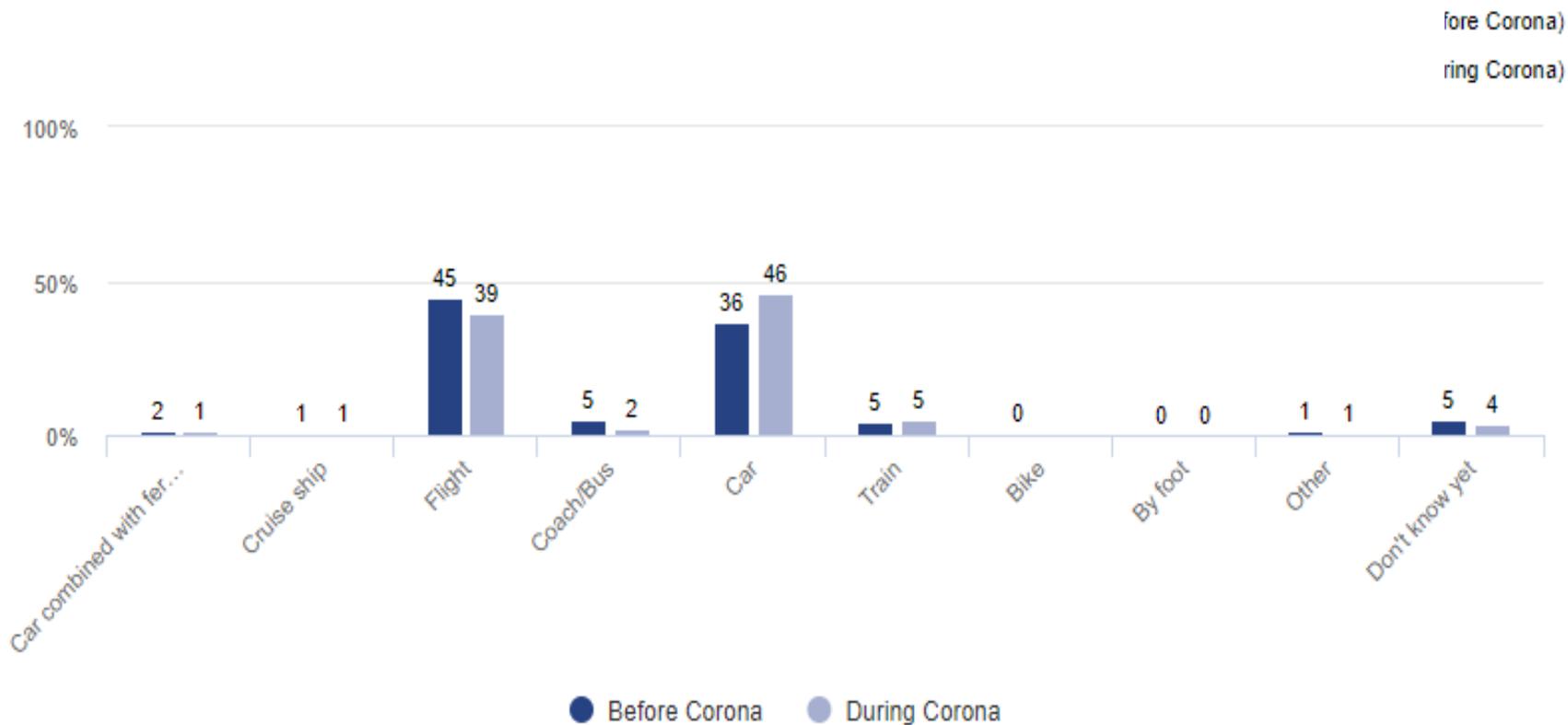
Question: Why wouldn't you consider this country?

Transport intentions & airports for flight

Shift from flight and bus/coach holidays to car holidays but still 39% of flight holidays !

Flight holidays : shift to smaller (regional) departing airports

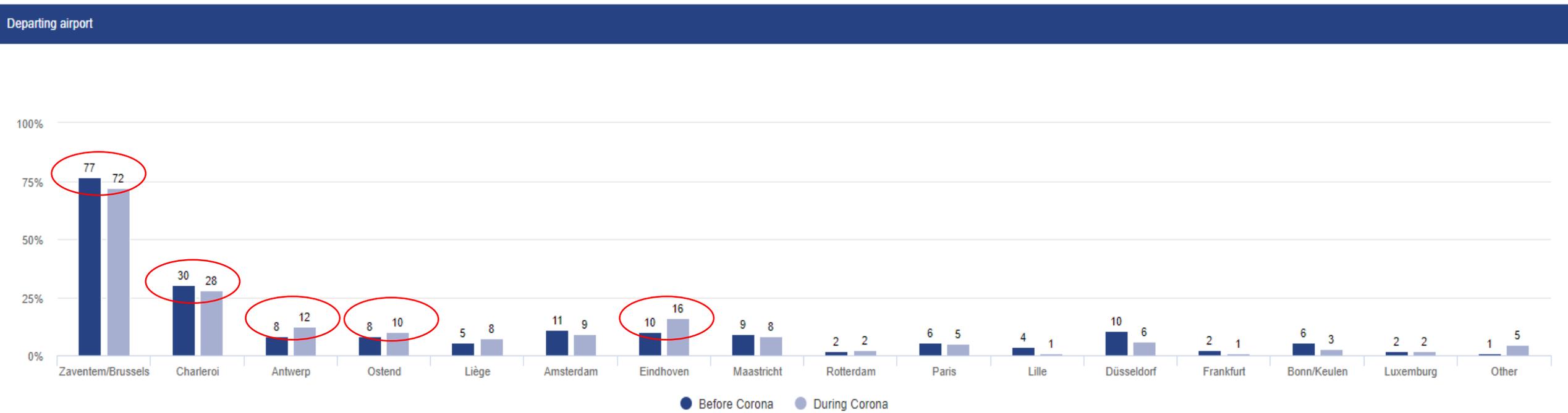
Transport type



Question: What will be your main method of transport?

Shift from flight and bus/coach holidays to car holidays

- More nearby and more Belgium
- Car : under your own control
- Still 39% of flight holidays !



Question: From which cities do you consider departing with the plane? ←

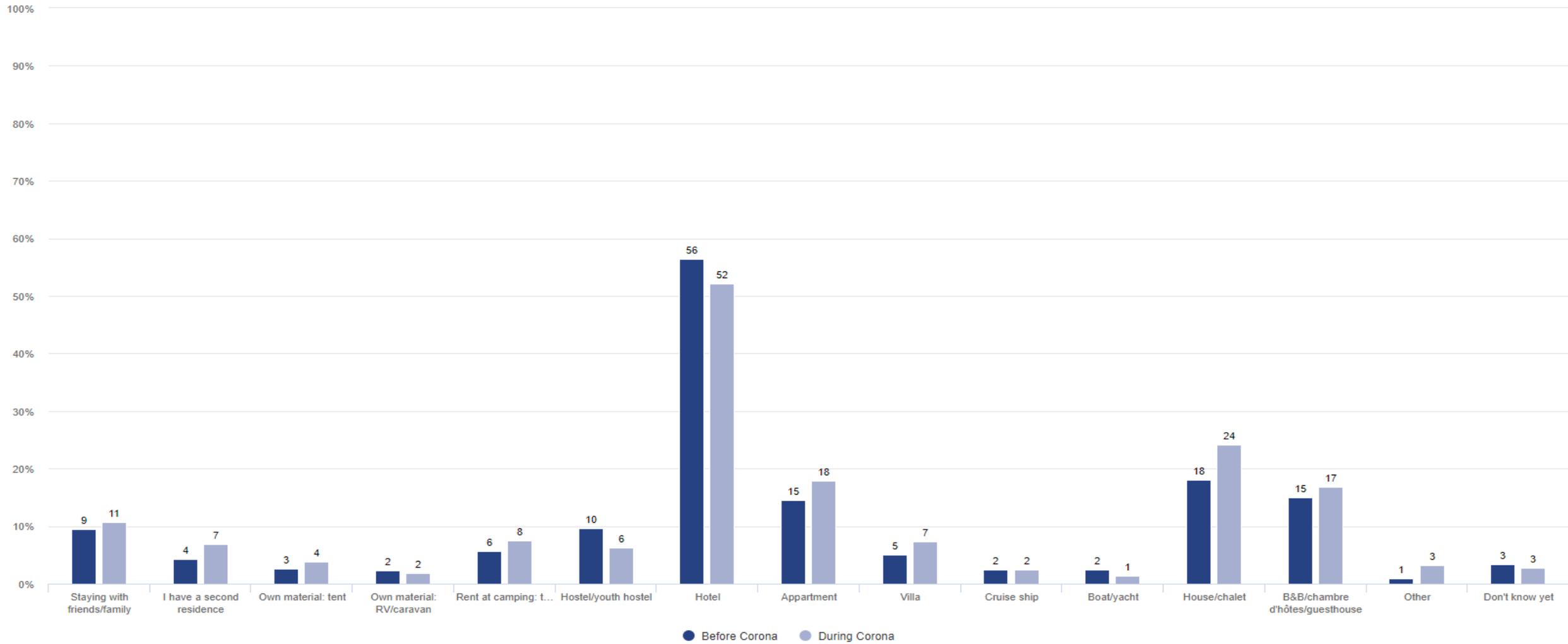
Flight holidays : shift from Brussels Airport (and Charleroi airport) to smaller (regional) airports

- Fear for big masses and large control procedures
- Ryanair cancelation and image effect on CRL ?
- Big challenge for airlines companies with reduced summer schedules

Intended accommodation formula's

**Shift from (traditional) hotel & hostels to camping, villa, apartments, house, chalet ... and second residence
But still 52% of traditional hotel**

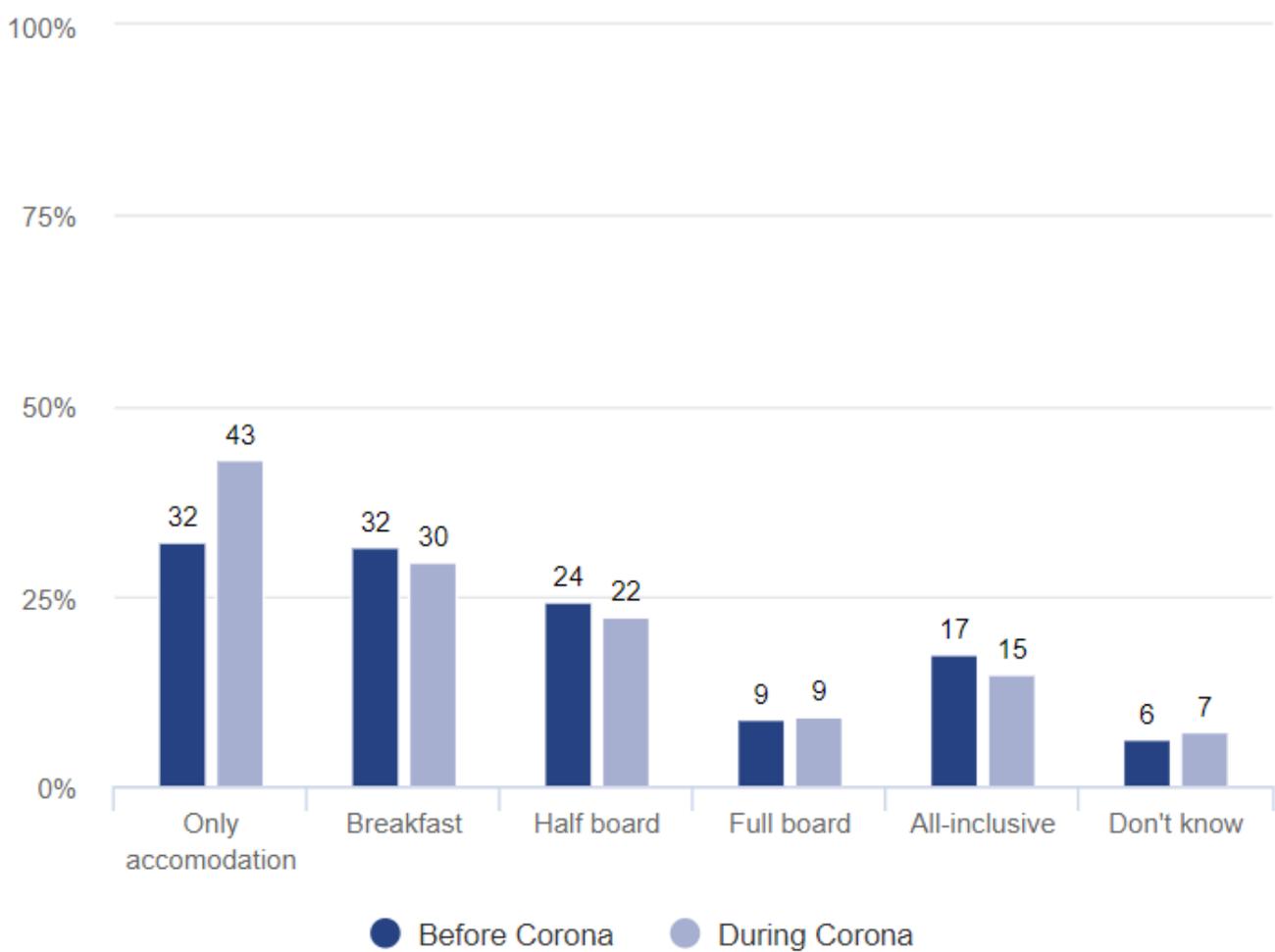
Food boards : Shift to self catering



Question: Which options do you consider for your accomodation? ←

Shift from (traditional) hotel & hostels to camping, villa, appartments, house, chalet ... and second residence

- But still 52% of tradional hotel !



Shift to self catering

- Related to accommodation choice
- Fear of “buffets” (highlighted in media)
- But still 15% all inclusive

Question: What types of boards do you consider for your accomodation? ←

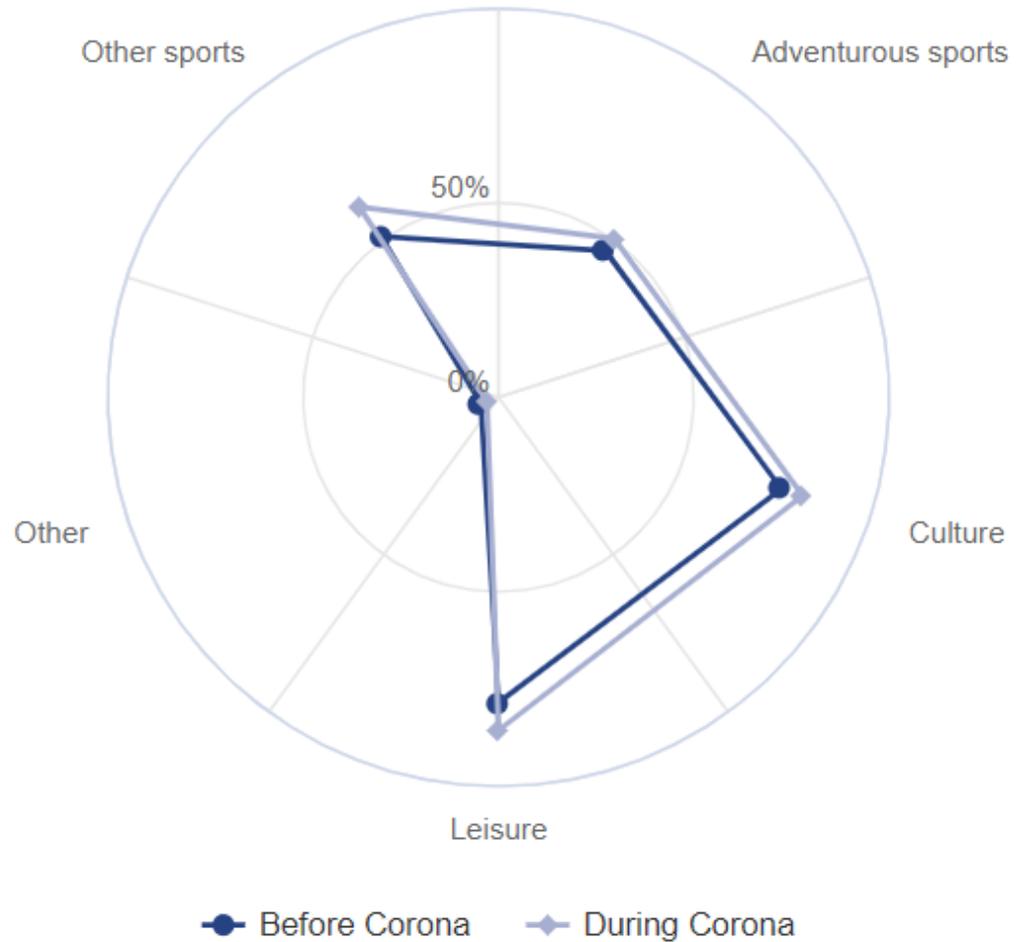
Intended activities on holiday

Travellers will to be more active on holiday after Corona due to lockdown effect

na)
na)

Travellers will to be more active on holiday after Corona due to lockdown effect

- Mainly sports : hiking, running, biking ... activities rediscovered during lockdown
- But also more culture and leisure : missed those activities during lockdown



Question: Which, if any, of these activities/experiences will you carry out during this trip? ←

Travel budget intentions

Intended travel spendings up with 11,5% per person

Before Corona



MAXIMUM SPENDING IN TOTAL
2055.1 EUR



MAXIMUM SPENDING PER PERSON
801 EUR

During Corona



MAXIMUM SPENDING IN TOTAL
2205.3 EUR



MAXIMUM SPENDING PER PERSON
893.5 EUR

Spendings up with 7,3% per party and 11,5% per person

- Even moderated figures due to more car holidays and more self-catering !
- Proof that travel is a important necessity and the last thing consumer wants to miss out . He is willing to pay for it.
- Travel budget not affected even with the bad economic outlook and unemployment.
- Travellers have spent less (for travel f.e.) in lockdown period and want to catch up

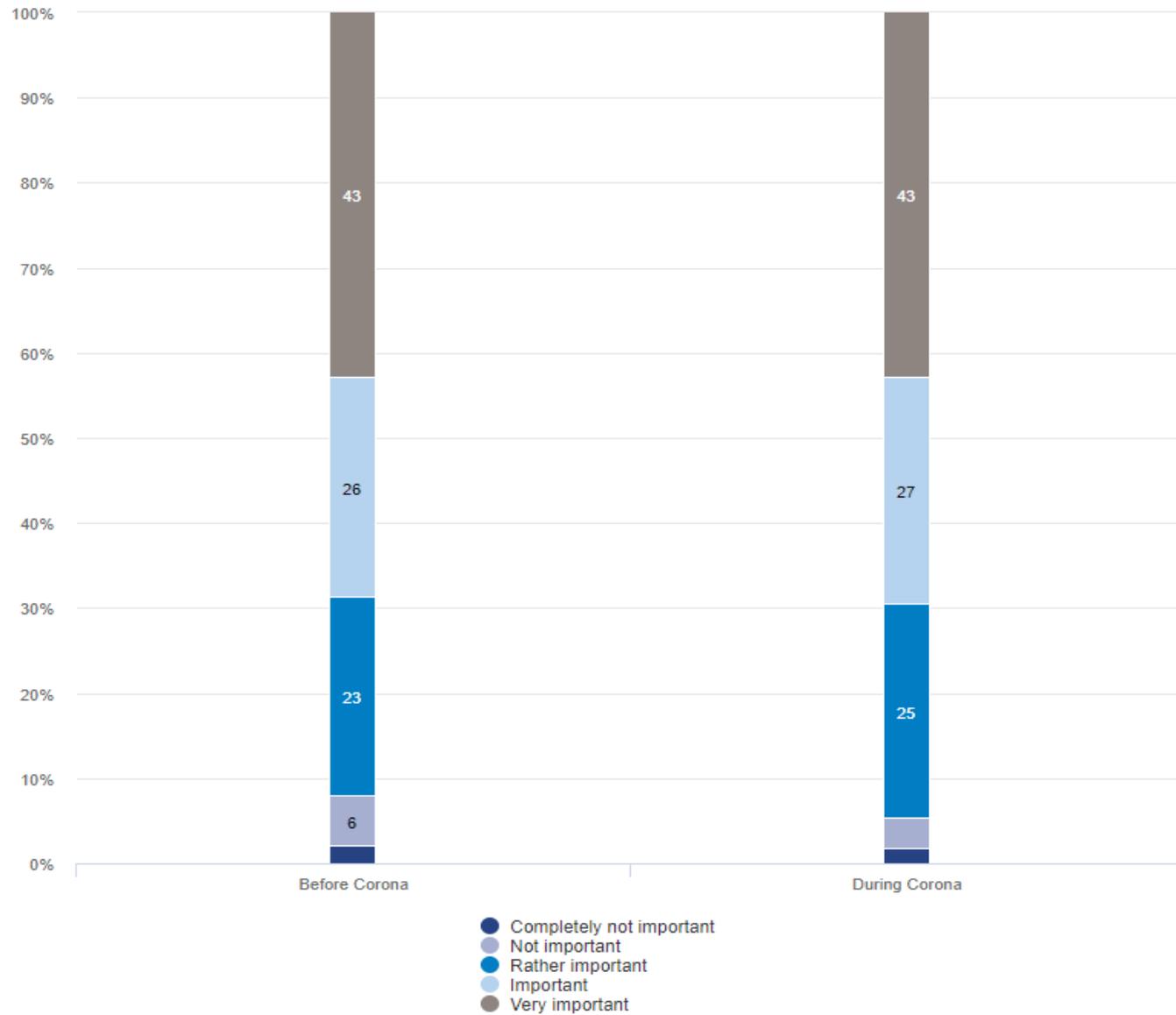
Importance of insurance for insolvency

Nobody doubts any more the importance of insolvency protection

⇒ **Thomas Cook**

⇒ **Vouchers Covid-19**

Importance of financial insurance



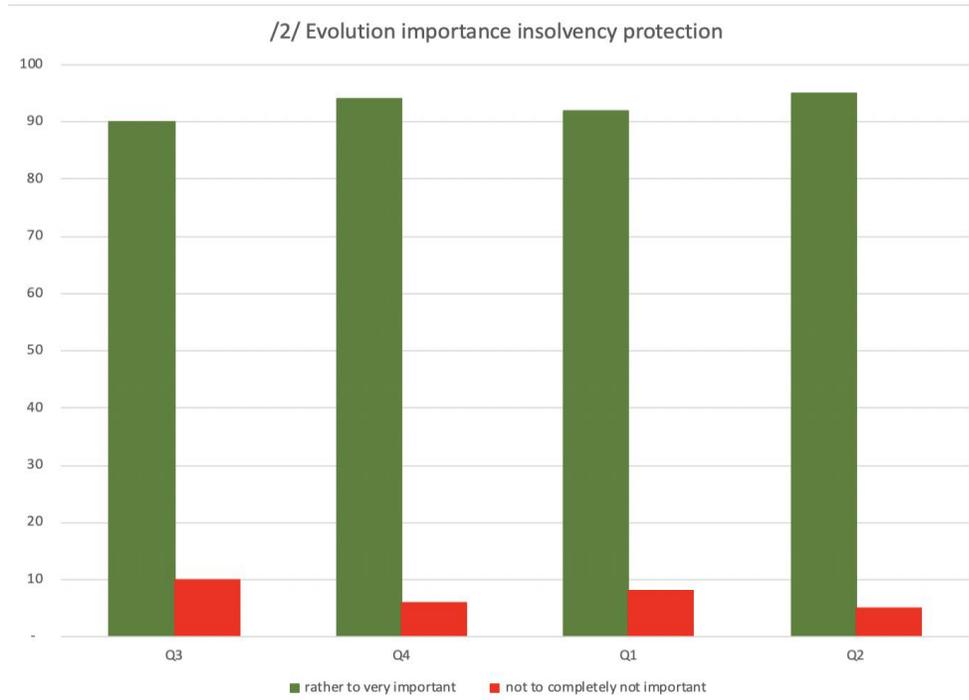
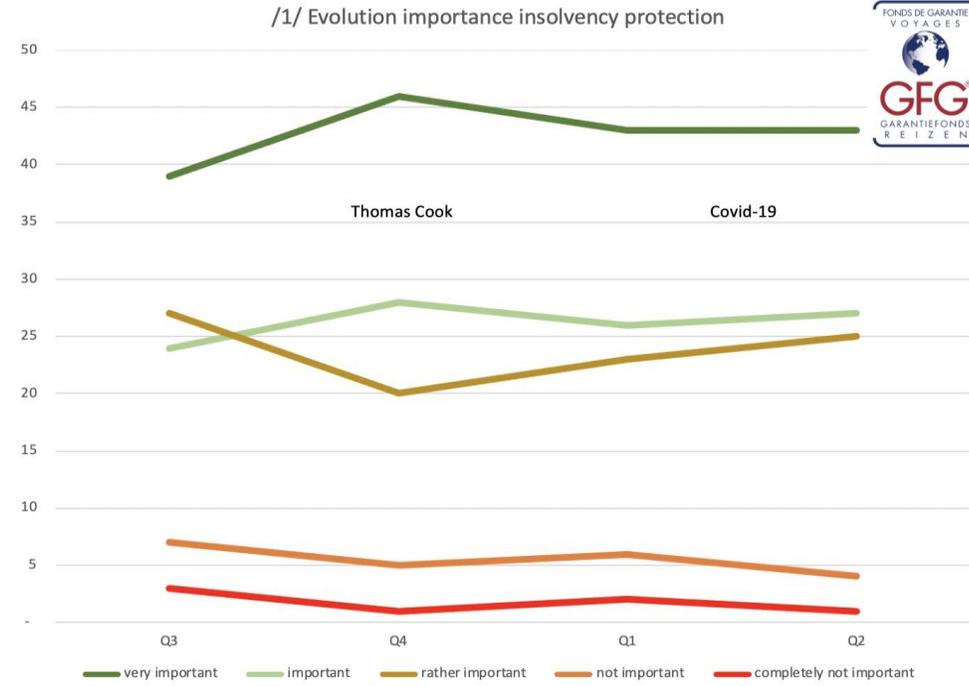
Question: To what extent do you think it's important that your travelling agency is insured against financial insolvency when you book a trip? This means you get your money back when the organisation defaults and goes bankrupt.



Nobody doubts any more the importance of insolvency protection

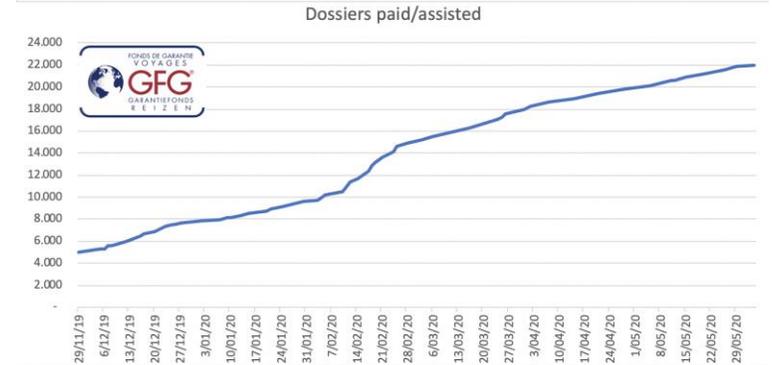
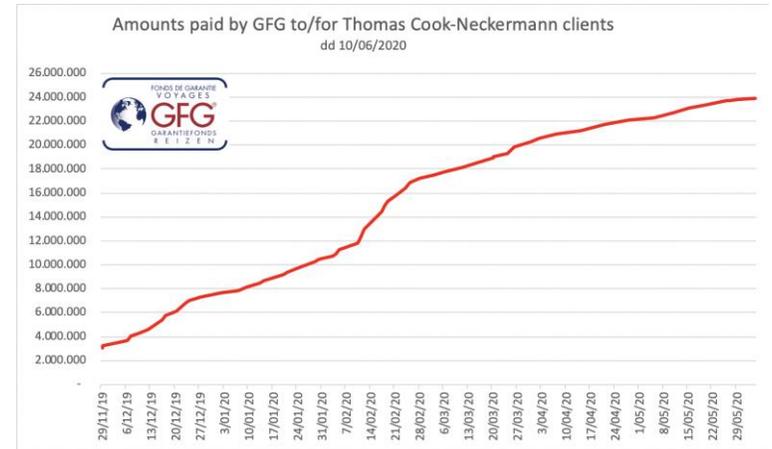
⇒ Thomas Cook

⇒ Vouchers Covid-19

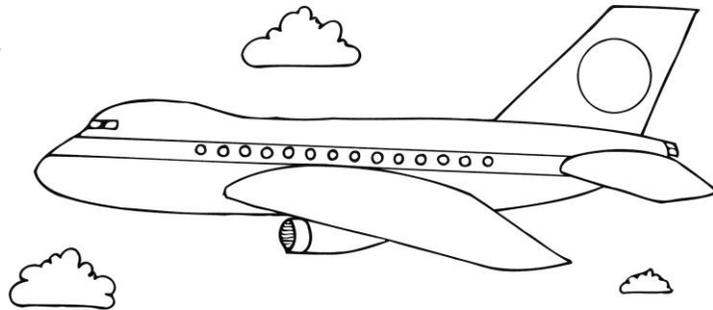
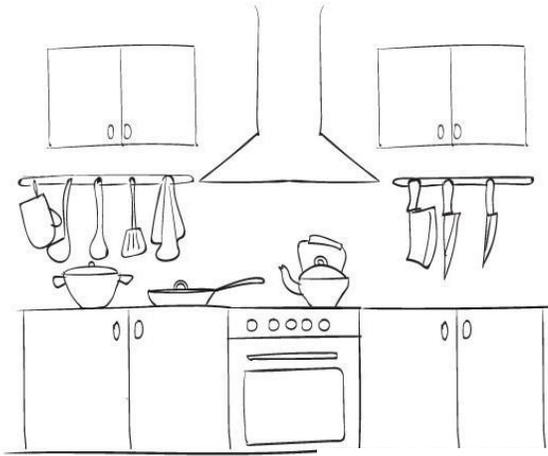


Overview Thomas Cook - Neckermann

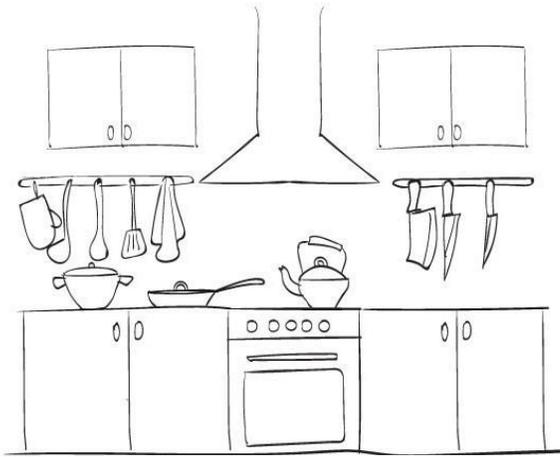
- Insolvency declared on 24/09/2019
- Today's state of reimbursements & assistance:
- 24.084.000 euro
- 22.144 dossiers
- 52.650 travellers helped = 95%



What is the difference between ?



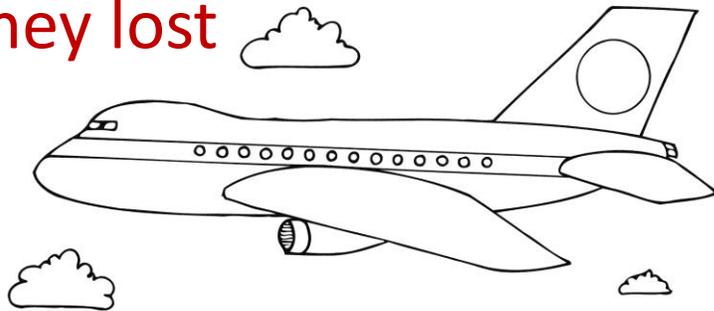
Travel industry gives a unique protection,
other industries do not!



Kitchen maker bankrupt =
money lost



Builder bankrupt =
money lost



Airline bankrupt = money lost

Travel agency =
money protected!



Thank you for your attention !

- Q & A 's from the chat !
- A summary will be send to you as press release, later today with a PDF copy of the presentation
- This was only a summary of much more data on travel intentions available
 - For ABTO members : in the online GTIR tool
 - For press : on request.
- Personal questions to the speakers ? Contact us !
 - GfG : Mark De Vriendt : mdv@gfg.be +32 2 240 68 01
 - ABTO : Pierre Fivet : pfivet@vacansoleil.com +32 479 99.43.91