



# **Adventure Travel Business Impact Monitor Survey: COVID-19 Preliminary Results**

*Data last updated: March 16, 2020 9:30 PM PST  
(Survey is still ongoing)*

**From the Adventure Travel  
Trade Association**  
MARCH 17 2020



Photo © ATTA / Hassen Salum

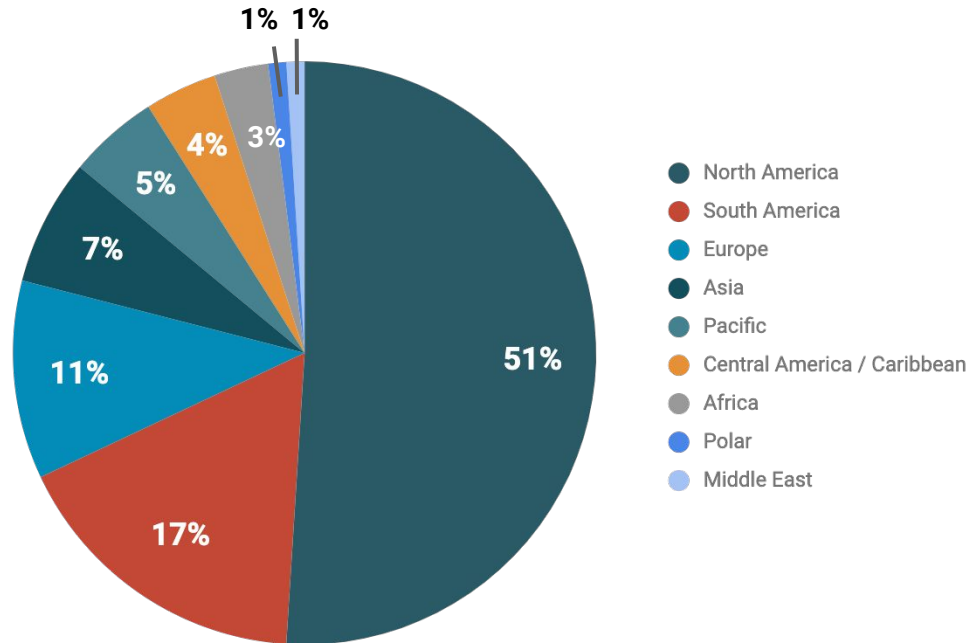


# Respondent Profile



# The dataset mainly reflects the views of North American (51%) organizations.

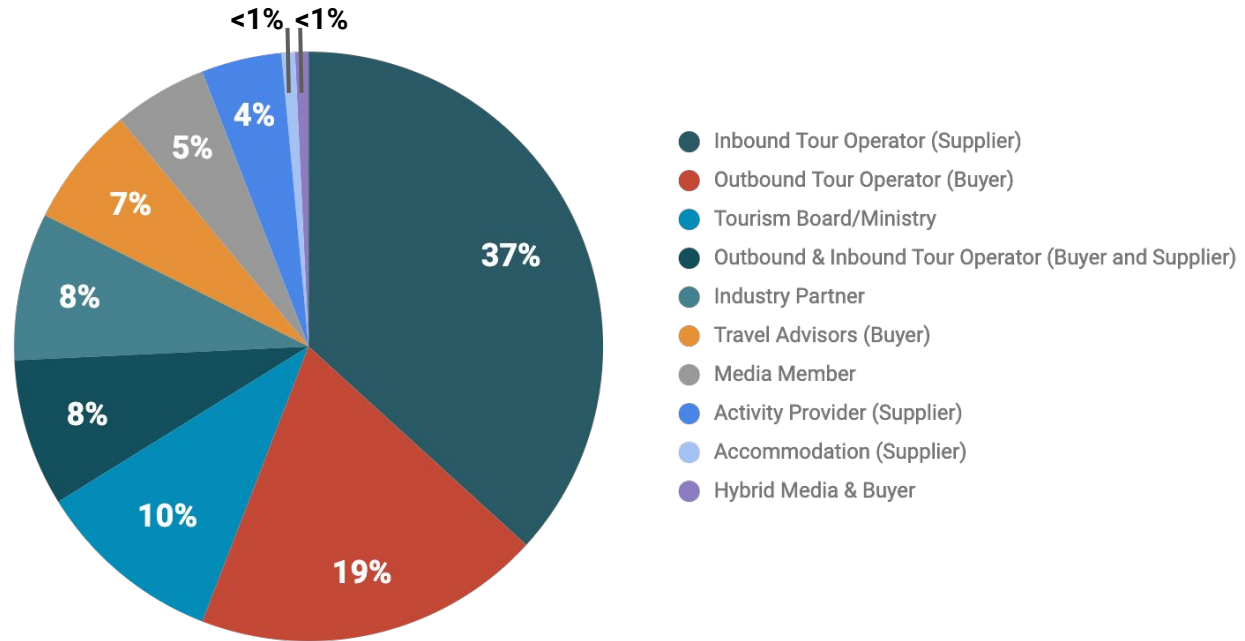
South American (17%) and European (11%) organizations make up over a quarter of the respondents.



**Q1:** In which country is your organization headquartered?  
**Base:** All respondents (n=136)

# The dataset leans toward the experiences of tour operators (64%).

Activity providers, accommodations, tourism boards, media and industry partners are also represented.




**Q2:** Please select the option that best describes your organization:  
**Base:** All respondents (n=136)





# Key Findings

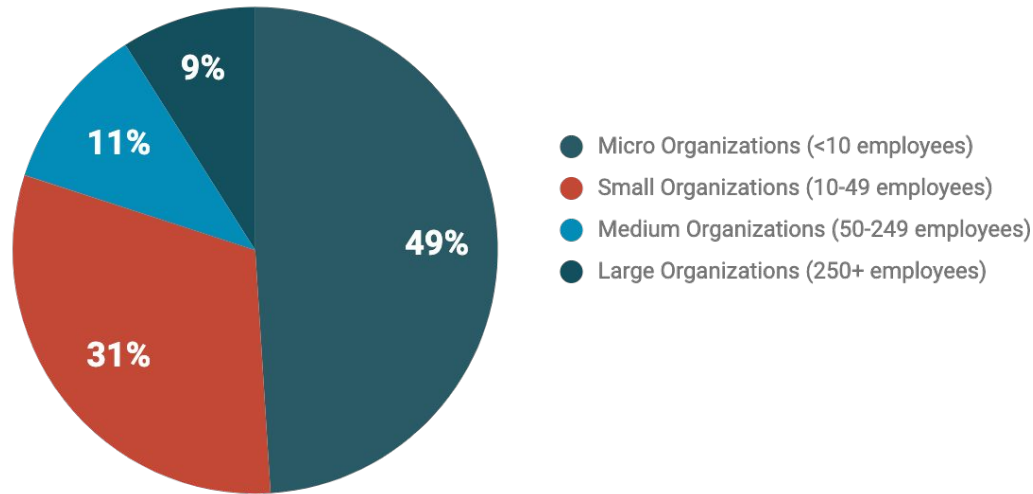
An aerial photograph of five kayakers on a river. The kayakers are in various colored kayaks: one blue, one teal, one yellow, and two more yellow. They are surrounded by dense green vegetation and reeds along the banks. The water is dark and calm.

**Tour Operators, Travel Advisors,  
Accommodations, and Activity  
Providers**

***(Buyers and Suppliers of Tourism Product)***

# Micro (49%) and small (31%) organizations make up 80% of the buyer/supplier respondents.

Medium organizations (11%) and large organizations (9%) are also represented.

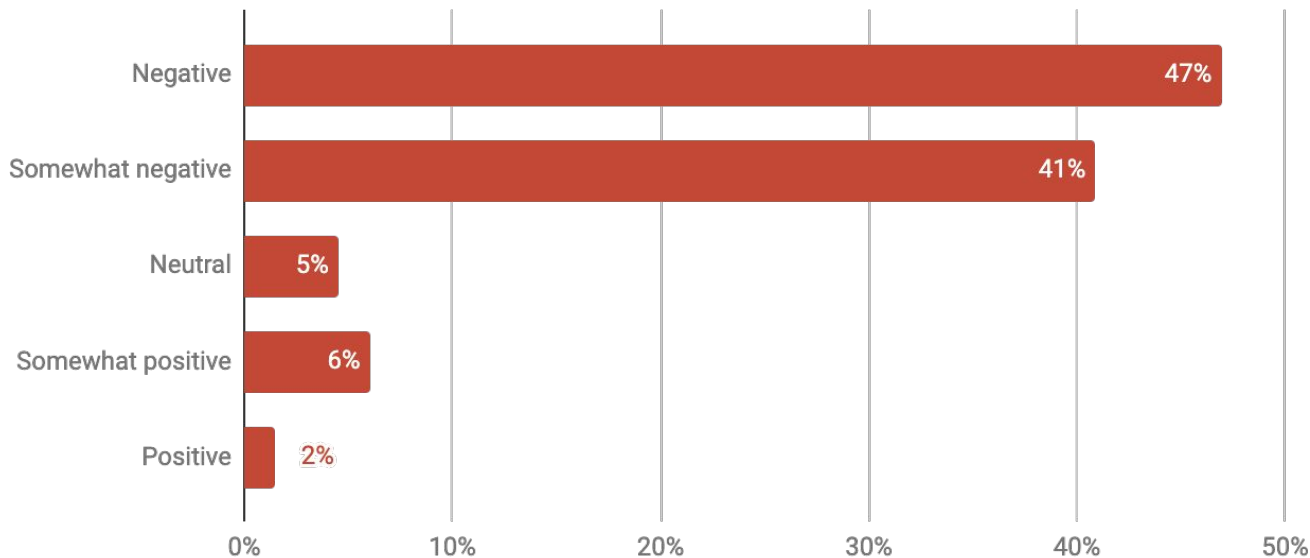


**Q4:** Please share your current workforce size.

**Base:** Buyer and supplier respondents (n=98); missing (n=6); total (n=104)

# Responding organizations have a **negative** outlook on their business' prospects over the next calendar year.

88% of the responding organizations report a 'negative' or 'somewhat negative' outlook on their business' prospects.



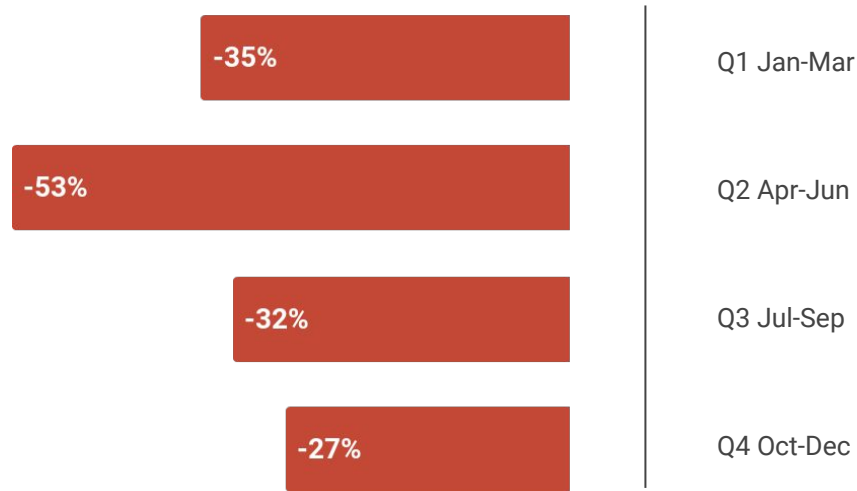
**Q5:** Please share your organization's outlook on your business's prospects over the next calendar year.

**Base:** Buyer and supplier respondents (n=67); missing (n=37); total (n=104)



# Businesses report an overwhelming decrease in demand (bookings) compared to 2019.

For Q2, responding organizations have seen demand fall by 53% on average.



% = Percentage of demand

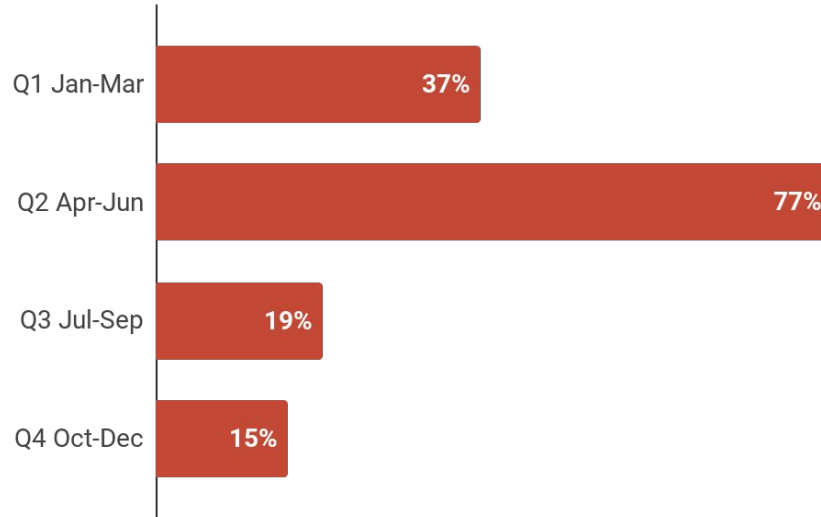


**Q6-Q9:** Compared to Q(1-4) 2019, we are seeing \_\_\_\_\_ (in) demand for bookings in Q(1-4) 2020.

**Base:** Buyer and supplier respondents (n=66); missing (n=38); total (n=104)

# And they are reporting a drastic increase in cancellations, culminating in lost revenue.

Please note: This data pertains to cancellations only. Questions related to reservation modification/postponement were not asked in the survey.

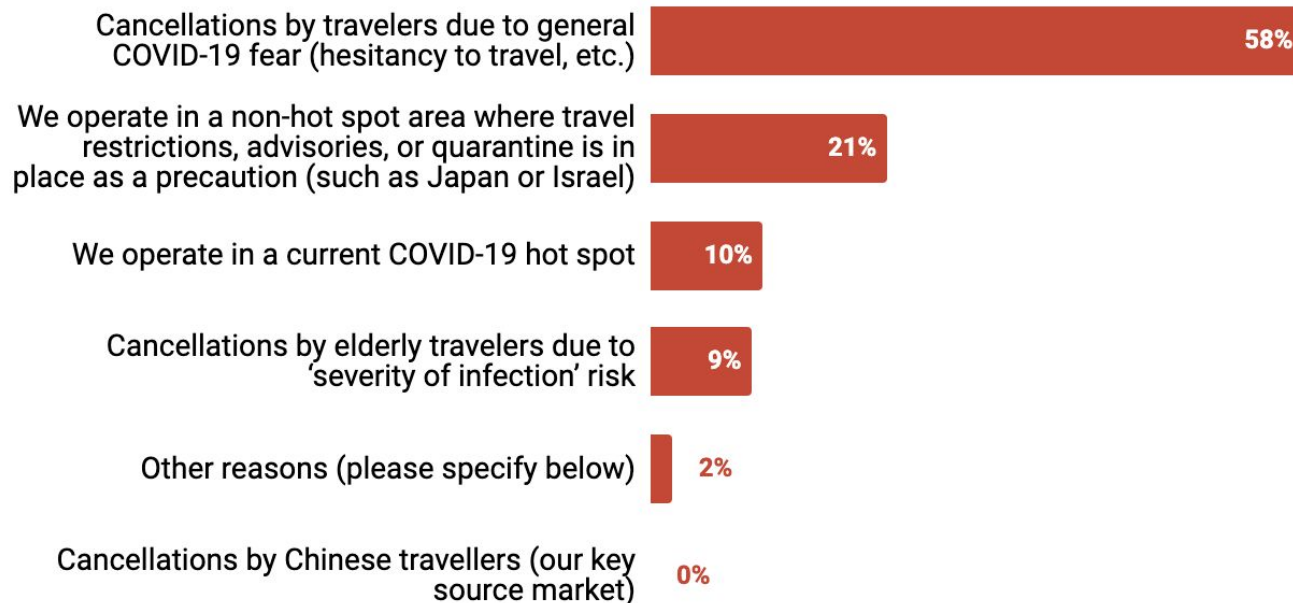


% = Percentage of bookings that have been cancelled compared to Q(1-4) 2019

**Q10-Q13:** Compared to Q(1-4) 2019, we are seeing a/an \_\_\_\_\_ (in) cancellations in Q(1-4) 2020.

**Base:** Buyer and supplier respondents (n=59); missing (n=45); total (n=104)

# Consumer hesitancy to travel (58%) and travel restrictions (21%) are the top-cited reasons for cancellations.



**Q14:** Out of 100%, to what do you attribute the cancellations, and by how much?

**Base:** Buyer and supplier respondents (n=34); missing (n=70); total (n=104)

# Reporting businesses have lost, on average, 18% of their 2019-equivalent revenues thus far in 2020 due to cancellations.

34 reporting organizations have collectively lost USD \$6.2 million thus far. The range for 2020 losses compared to responding organizations' 2019 revenues is 3-42%.

# 18%

In USD, estimated average loss of  
2019 revenues due to cancellations  
per reporting organization



**Q16:** For your business, what is the approximate value (revenue potential) of bookings canceled in 2020 due to COVID-19 related reasons?

**Q17:** What proportion of your annual 2019 revenues does the figure you reported in the previous question represent?

**Base:** Buyer and supplier respondents (n=34); missing (n=70); total (n=104)

Overall, reporting businesses expect a one-third decrease in business volume compared to the last calendar year.

↓ 35%

Estimated decrease in business volume  
over the last calendar year



**Q18:** Compared to the last calendar year (2019-2020), we expect to see \_\_\_\_\_ (in) business volume (revenues) over the next calendar year (2020-2021).

**Base:** Buyer and supplier respondents (n=49); missing (n=55); total (n=104)

# Responding Organizations' Open Thoughts: Negative and Positive Impact of COVID-19

## Negative Impact (n=42)

- Cancellations
- Decrease in demand
- Travel restrictions
- Loss of revenue/income
- Staff stress
- Unstable and damaged relations with suppliers
- Reduction in salaries and hours of employees
- Chaos

*“675 cancellations over the past 17 days. Loss of approximately 300 new reservations so far.”*

## Positive Impact (n=12)

- Last-minute bookings in February (from a COVID-19 hotspot to a non-hotspot)
- Contingency planning for the future
- Deeper look into finances, seeking efficiencies
- Creation of new rules and cancelling policies
- Greater staff ability to work remotely
- Downtime
- Time to invest in other things, such as upgrading company website
- Travel industry coming together

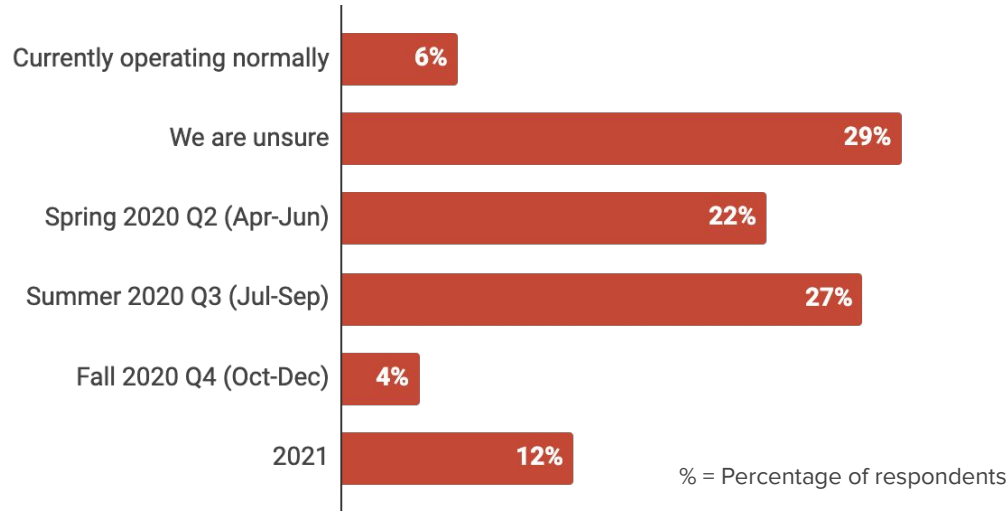
*“We're thinking about how to be more resilient in the future.”*



**Q20-Q21:** If applicable, please share how your organization has been impacted (negatively/positively) by the COVID-19 outbreak.  
**Base: Buyer and supplier respondents (n=42); missing (n=62); total (n=104)**

# 49% of the responding businesses expect to resume normal operations by Summer 2020. More than a quarter (29%) are unsure.

Overall, businesses are expecting a quick recovery.



**Q21:** When do you expect your business to resume normal or accelerated operations?  
**Base:** Buyer and supplier respondents (n=49); missing (n=55); total (n=104)

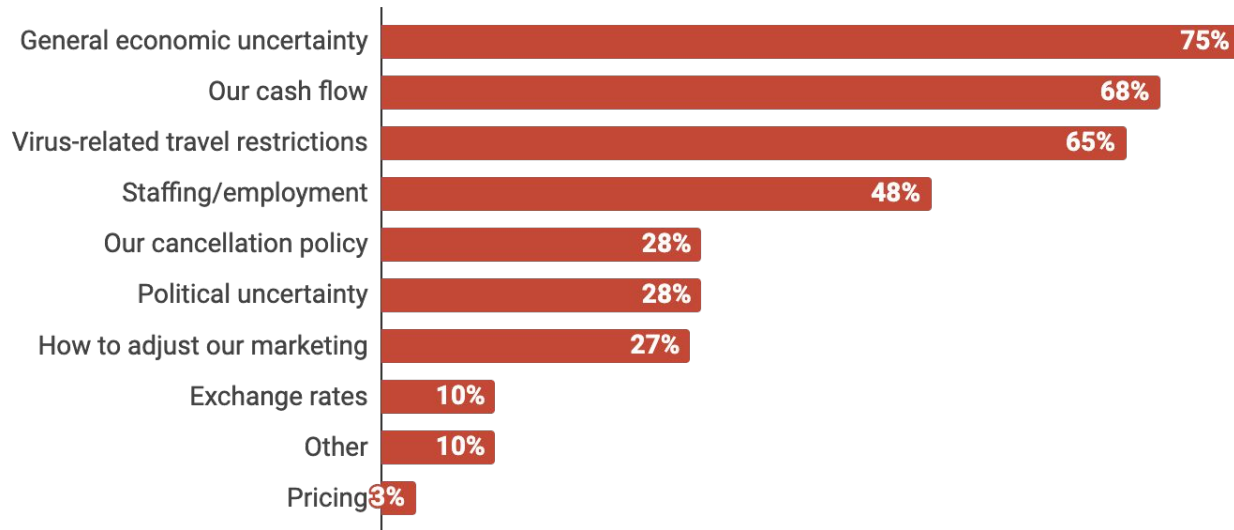
An aerial photograph of five kayakers on a river. The kayakers are in various colored kayaks: one blue, one teal, one yellow, and two more yellow. They are positioned in a loose line across the river. The water is dark, and the banks are lined with tall grasses and reeds. The text "ORGANIZATIONAL CONCERNS" is overlaid in large, white, bold, sans-serif font across the center of the image.

# ORGANIZATIONAL CONCERNS



# Economic uncertainty (75%) and cash-flow (68%) are responding businesses' key short-term concerns.

Businesses are also having to deal with travel restrictions, staffing/employment issues, and cancellation policies.



% = Percentage of respondents

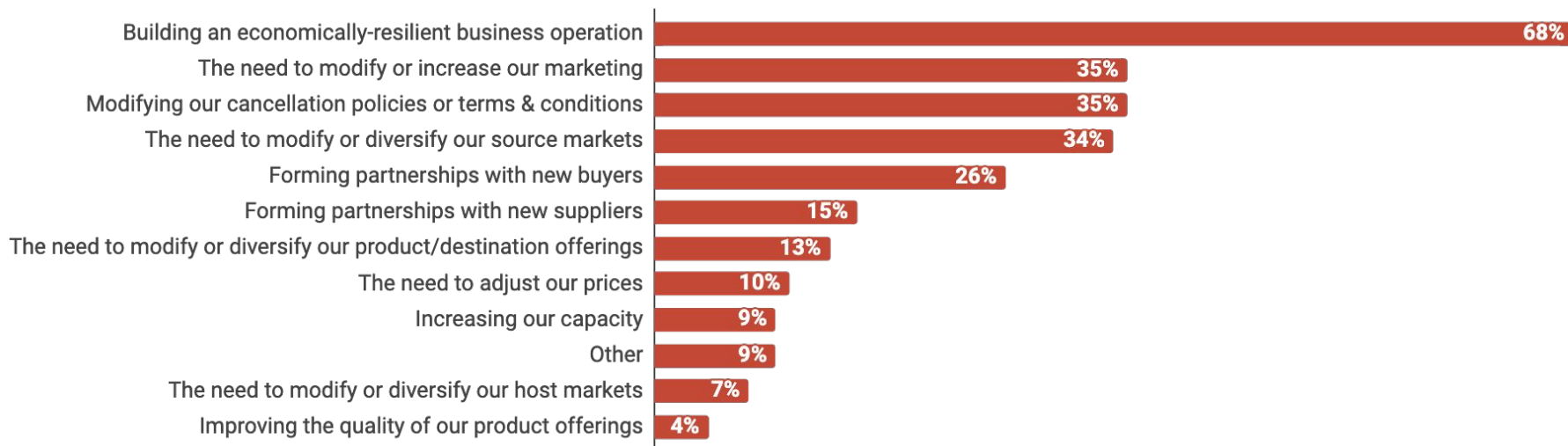


**Q36:** What are your organization's key short-term concerns concerning COVID-19?

**Base:** Buyer and supplier respondents (n=71); missing (n=55); total (n=104)

# Building an economically-resilient operation (68%) is the top long-term organizational concern.

Marketing, diversification of source markets, and modification of cancellation policies are also key long-term business concerns.



% = Percentage of respondents

**Q36:** What are your organization's key long-term concerns concerning COVID-19?

**Base:** Buyer and supplier respondents (n=68); missing (n=58); total (n=104)

An aerial photograph of five kayakers on a river. The kayakers are in two yellow kayaks at the bottom, one blue kayak in the middle, and two light blue kayakers at the top. The river is surrounded by dense green reeds and grasses. The text "CRISIS MANAGEMENT STRATEGIES & SUPPORT" is overlaid in white, bold, sans-serif font on the left side of the image.

# CRISIS MANAGEMENT STRATEGIES & SUPPORT

# The three most effective crisis management strategies organizations have already implemented are as follows:

Responding organizations were asked to rank their implemented crisis management strategies by effectiveness.

1. Changing cancellation and transfer policies (60%)
2. Reducing general business/organization expenses(63%)
3. Reducing employee hours or pay, or layoffs (31%)

% = Percentage of respondents

**Q38:** What measures has your organization already implemented to brace for the impact of COVID-19?

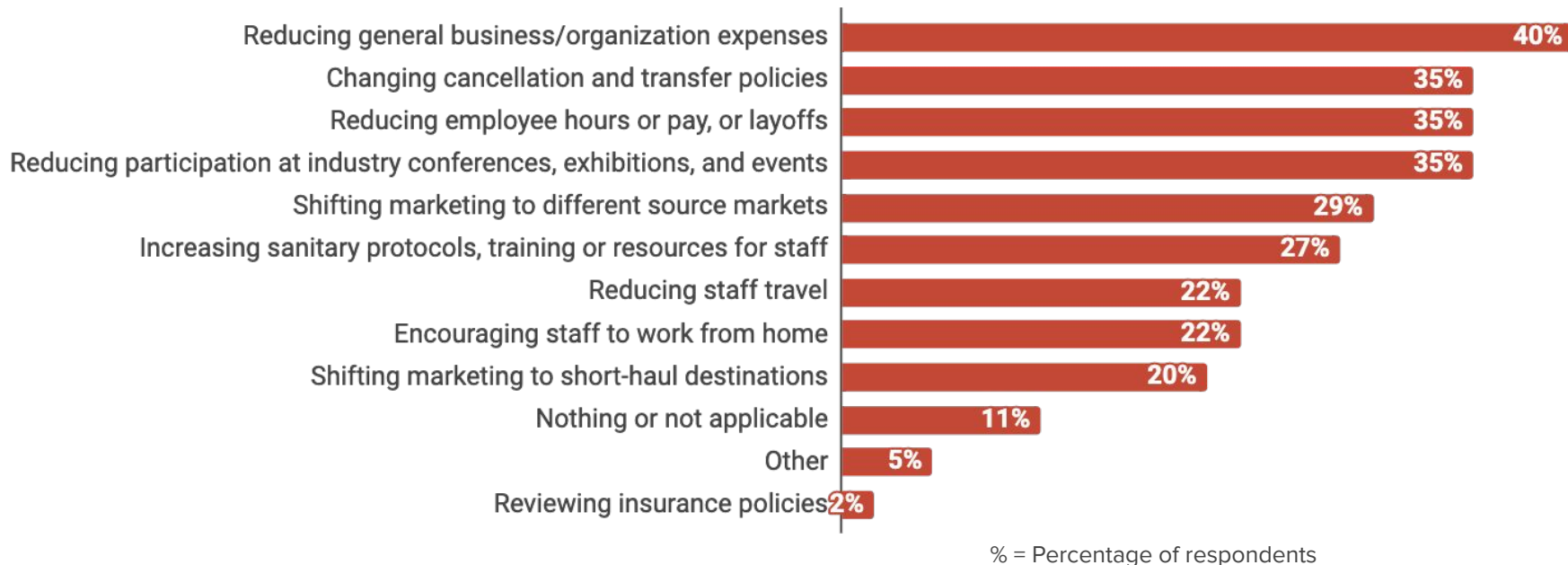
**Q39:** Please 'drag and drop' your selected options to rank the coping strategies your organization has already implemented by importance and effectiveness (top/key/most-effective strategies first).

**Base:** Buyer and supplier respondents (n=68); missing (n=58); total (n=104)



# The already implemented strategies may also prove to be the most effective strategies to be reimplemented.

Among other strategies being considered is reducing industry event participation.

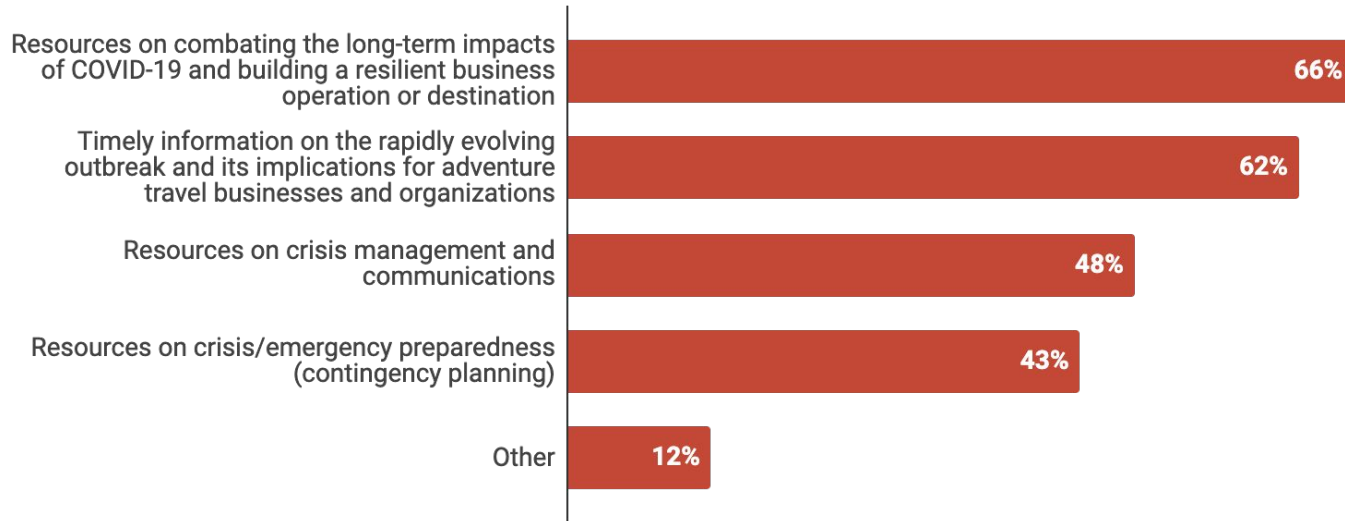


**Q40:** What other measures is your organization considering implementing to brace for the impact of a prolonged COVID-19 outbreak?

**Base:** Buyer and supplier respondents (n=55); missing (n=49); total (n=104)

# Ways the ATTA Can Best Support My Organization at this Time

Organizations are seeking timely information on the outbreak, and resources on combating the long-term impacts of the COVID-19 outbreak.



% = Percentage of respondents



**Q41:** How can the ATTA best support your organization at this time?

**Base:** Buyer and supplier respondents (n=65); missing (n=39); total (n=104)



**Thank you. Questions?**

**For more information, contact:  
Heather Kelly  
Senior Research Manager, ATTA  
heather@adventuretravel.biz**

