GLIMPSES OF RECOVERY
Traveler sentiment survey | Edition 1

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EXECUTIVE SUMMARY

In late April and early May of this year, Oliver Wyman conducted a survey of travelers across nine countries (United States, Canada, United Kingdom, Spain, France, Germany, Italy, China, and Australia) to capture how the COVID-19 pandemic is affecting attitudes and opinions on travel. This was the first of three planned surveys that will chart how travelers’ views change as the pandemic — and responses to it — evolve.

Our “Edition 1” survey involved nearly 4,600 people, all of whom had flown at least once in 2019. Half are airline loyalty members, and 10 percent of all respondents hold elite status with at least one airline. Over one-third are hotel loyalty members, with nearly one-quarter of all respondents holding some level of elite hotel status.

The first survey was conducted well after new COVID-19 cases had peaked in China and about a month after cases had peaked in Italy, Spain, Germany, and Australia. The level of new cases in the United States, United Kingdom, and Canada remained elevated over the survey period. Travel restrictions largely came into force in March and were not yet relaxed by early May (Exhibit 1).

Exhibit 1. COVID-19 peaks by country
Seven-day average of new cases, as a percentage of country’s peak

Source: Oliver Wyman analysis
POST-PANDEMIC TRAVEL PLANNING

The Edition 1 survey results show that the intent to travel remains strong, with nearly 60 percent of survey respondents expecting to travel the same or more once the pandemic ends. A quarter of leisure travelers in the United States and Italy expect to travel more post-pandemic, but about 60 percent in China and Spain expect to travel less. On the business travel side, more than 70 percent that travel for business by air expect to travel the same or more than planned post-pandemic. Changes in corporate travel policies and budgets, however, may be the deciding factor in how much of business travel resumes.

Although people are longing to travel, 60 percent of our survey respondents say they will wait for their government or the World Health Organization to indicate it is safe to do so. Generally only about 17 percent plan to defer travel until they receive a vaccine or acquire antibodies.

Even after international travel restrictions are lifted, respondents say they are more likely to travel within their country than internationally for their next trip. Over a third of those who plan to travel more domestically post-pandemic believe that the pandemic situation is more severe internationally, while over a quarter want to support their country’s tourism industry. Respondents worldwide expect to travel slightly more by car post-pandemic.

CLEANLINESS AND CONFIDENCE

Cleanliness will be a material demand driver and even a differentiator, favoring major brands over the sharing economy. Planes, trains, and rental cars are respondents’ preferred modes of transportation: Approximately 70 percent expect to travel by air or rail the same or more following the end of the pandemic. On the other hand, home-sharing, ridesharing, and public transport could see the highest increases in planned avoidance.

When it comes to choosing whether or not to fly, most travelers cite improvements in aircraft and airport cleaning as significant criteria. Aside from price, perceptions of how travelers were treated by airlines during the pandemic and cleaning policies are top factors in deciding which airline to fly. Hotel choice is being influenced by these same factors. Overall, airlines and hotel companies appear to have done a good job communicating with their customers, as the vast majority of respondents have favorable impressions of how their preferred airline/hotel brand has responded to the COVID-19 crisis.

Still, securing the end-to-end travel experience remains a challenge and restoring traveler confidence likely will require greater innovation, visibility, and communication around cleaning and health protocols. In our Edition 2 survey, we will further explore traveler expectations as countries begin to relax travel restrictions.
REIGNITING TRAVEL DEMAND

More than half of the travelers we surveyed are primed to be on the move once restrictions are lifted or the World Health Organization gives the “all clear” (Exhibit 2). About 17 percent are holding out for acquired immunity or a vaccine. Only a third each ranked lifted lockdown orders, a vaccine, or declining virus rates internationally as a top-three reason to wait on travel.

On a country basis, waiting to take a first trip until travel restrictions are lifted was the most common response from the United Kingdom and Australia; in the latter case possibly as a result of the Australian government banning citizens from traveling overseas as early as March 25. On the other hand, Canada and Italy have higher than average numbers who will wait for a vaccine or antibodies, at 27 percent and 22 percent, respectively.

Exhibit 2. “When do you think it will be okay to start your first trip after the COVID-19 outbreak?”
First choice, percent of survey respondents

<table>
<thead>
<tr>
<th>Government/public policy</th>
<th>Percentage of all respondents</th>
<th>Percentage of respondents who ranked choice in their top three</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO declares end of threat</td>
<td>23</td>
<td>52</td>
</tr>
<tr>
<td>Government lifts travel/quarantine restrictions</td>
<td>29</td>
<td>54</td>
</tr>
<tr>
<td>Government lifts shelter-in-place orders/lockdown</td>
<td>8</td>
<td>29</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal risk assessment</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Active infections begin to decline domestically</td>
<td>11</td>
<td>22</td>
</tr>
<tr>
<td>Active infections begin to decline internationally</td>
<td>7</td>
<td>32</td>
</tr>
<tr>
<td>I have a COVID-19 vaccine</td>
<td>12</td>
<td>33</td>
</tr>
<tr>
<td>I have the antibody or acquired immunity</td>
<td>5</td>
<td>21</td>
</tr>
<tr>
<td>It’s all right to travel right now</td>
<td>4</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
A LONGING FOR LEISURE

Fifty-six percent of global respondents expect to travel the same or more than planned for leisure post-COVID-19 (Exhibit 3). The 18 percent who plan to travel more cite a variety of reasons: bored from quarantine, need to have fun, life is short, need to enjoy, and to make up for canceled trips.

Of the 41 percent who expect to travel less, over half are worried about a resurgence of the virus, while concerns about health protocols for planes, trains, and hotels are also top-of-mind. For one in ten, financial challenges due to the pandemic are the main reason for traveling less. We will watch this response closely in subsequent surveys, as the economic damage from the pandemic becomes more apparent. Only three percent plan to give up on leisure travel entirely for the next 18 months — a good sign for a hungry travel industry.

At the high end, a quarter of travelers in the United States and Italy expect to travel more than planned over the next 18 months, once the outbreak ends. On the other end of the spectrum, 63 percent of Chinese and 52 percent of Spanish travelers expect to travel less. Most critically, 60 to 70 percent of travelers say they are unlikely to travel if there are ongoing outbreaks. Any resurgence of the virus will most certainly dampen travel demand, even if that is limited to “hotspots” as they emerge.

Exhibit 3. “When the COVID-19 outbreak ends and travel restrictions are lifted, will you travel more, the same, or less than you had planned for leisure over the next 18 months?”

Percent of survey respondents

- 18% More than planned
- 41% Less than planned
- 3% Cancel all travel planned
- 38% No change

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
BACK TO BUSINESS

Once the pandemic ends and travel restrictions are lifted, 73 percent of those who travel for business by air expect to travel the same or more (Exhibit 4). While this is a positive outlook, it is important to note that survey responses reflect individual intent only; business travel may be curtailed by corporate travel budgets and policies as companies look to optimize travel expenditures, especially during an economic downturn.

For example, even prior to the pandemic, nearly half of nearly 1,000 companies responding to a 2018 American Express European Business Travel Barometer survey believed they could achieve six percent or more in savings on travel. We believe that post-pandemic, business travel spend will be under greater scrutiny, particularly the 40 percent that is related to internal company needs, such as attending corporate events and conferences and intra-company travel.

Globally, only 13 percent of respondents plan to travel more by air for business post-pandemic, while a little more than a quarter plan to travel less. The split is fairly similar across countries, except for China: higher numbers of Chinese respondents expect to travel both more (24 percent) and less (37 percent) than originally planned. Health and safety concerns, mixed success with teleconferencing and remote work, and expectations around the direction of business activity may all be playing a role in business travelers’ changed expectations around how much they will need to travel post-pandemic.

Exhibit 4. “When the COVID-19 outbreak ends and restrictions are lifted, will you travel more, less, or the same for business when air travel is required?”

Percent of survey respondents who traveled for business by air prior to the pandemic

![Pie chart showing travel plans after pandemic]

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
Where people work from may be one of the biggest structural changes being brought about by the pandemic. In recent weeks, companies such as Twitter and Facebook have announced long-term policy changes to enable more employees to work remotely. In our survey, more than half of respondents have been able to work from home during the pandemic. Of these, 42 percent plan to go back to their usual office hours. But the real surprise is that a third expect to work from home an additional one to two days compared to prior to the pandemic, and a quarter expect to work from home three to five more days per week.

**POINT TO THE MAP**

When the outbreak ends, even if other countries have lifted travel restrictions, most travelers expect their first trip to be domestic, with 41 percent simply following up on plans made before the pandemic hit. Other top reasons for domestic trips include getting close to nature and visiting friends and family. In terms of domestic destinations, 59 percent are planning a trip to a city versus 41 percent to the country (Exhibit 5).

Across geographies, travelers in the United Kingdom, Germany, and Canada are the most eager for an international leisure trip (Exhibit 6). In the United States, China, and Italy, a majority plan to stay in-country and visit an urban destination instead.

**Exhibit 5. Likely destination for next leisure trip, post-COVID-19**

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Percent of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic rural</td>
<td>24%</td>
</tr>
<tr>
<td>Domestic urban</td>
<td>34%</td>
</tr>
<tr>
<td>International</td>
<td>37%</td>
</tr>
<tr>
<td>I am not planning to travel</td>
<td>6%</td>
</tr>
</tbody>
</table>

Of those planning **domestic** trips, 41% are more likely to go to **rural** destinations vs. 59% for **urban**.

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
Exhibit 6. By country: Likely destination for next leisure trip, post-COVID-19
Percent of country’s respondents

Over the longer term, 56 percent of respondents think that the pandemic will change the way they travel even two or more years from now, including choice of destinations. What changes in travel are likely to be short term versus structural are largely unknowns at this point however, as they will depend on which pandemic scenario — such as multiple waves, a vaccine in 2021, or no vaccine at all — comes true.
The pandemic is making travelers think twice about some modes of travel. While they are relatively comfortable or neutral about flying or renting a car, that comfort level drops for public transportation and ridesharing (Exhibit 7). In terms of typical travel activities, two-thirds of respondents are comfortable or neutral with regard to staying in a hotel or dining out, but less than half are comfortable attending events with large crowds, such as concerts, sporting events, and trade shows.

By country, travelers in the United States, Australia, and China are the most comfortable taking a flight, while Europeans, particularly those from Italy and Spain, are the least comfortable with all transportation modes and activities. This is certainly understandable, given that Italy and Spain were hit hard early in the COVID-19 outbreak and underwent severe lockdowns.

Exhibit 7. “After the COVID-19 outbreak ends and travel restrictions are lifted, how comfortable will you feel doing each of these activities?”
Percent of survey respondents

<table>
<thead>
<tr>
<th>Transportation modes</th>
<th>Comfortable</th>
<th>Neutral</th>
<th>Uncomfortable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take a flight</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Rent a car</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Take a train</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Use public transportation</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Use a rideshare</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activities</th>
<th>Comfortable</th>
<th>Neutral</th>
<th>Uncomfortable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stay at a hotel</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Dine at a restaurant</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Attend concert/sporting event</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Attend convention/trade show</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Note: Uncomfortable includes “very uncomfortable” or “somewhat uncomfortable”; comfortable includes “very comfortable” or “somewhat comfortable”

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
Following the pandemic, nearly a quarter of global respondents expect to drive or use rental cars more than before, and 72 percent expect to use planes the same or more (Exhibit 8). Trains and public transport are slightly less favored. Respondents are most cautious when it comes to transport modes that are associated more with “optional” travel and perhaps perceived as riskier — more than half say they are less likely to cruise or use buses than before the pandemic.

**Exhibit 8. Expected transportation mode usage post-COVID-19**
Percent of survey respondents for each

- **Rental cars/self-driving**: Use more
- **Airplanes**: Use same
- **Trains**: Use less
- **Public transport**: Use same
- **Ships/cruises**: Use less
- **Tour buses**: Use less
- **Long distance buses**: Use less

*Source: Oliver Wyman Traveler Sentiment Survey, Edition 1*
DECISION FACTORS AND CHOICES

Cleanliness and health measures, clear and frequent communications, and flexibility for customers are the top three criteria for travelers when it comes to evaluating travel brands’ responses to the pandemic (Exhibit 9). Cleanliness unsurprisingly ranks as most important and could offer an opportunity for differentiation; large travel brands in particular could capitalize on their ability to standardize processes and quality control, and even to be seen as innovative in this area. Some examples of novel measures being used in air travel, hotels, and transport stations include ultraviolet sanitization, “nano” air filtering, robotized cleaning and sterilization, mask vending machines, vehicle crowding information screens, and artificial intelligence-driven temperature checks.

Treatment of employees is important to nearly half of respondents — and should be included in communication efforts. Although offering promotions was rated fairly low as a response mechanism, promotions can provide travel brands with a useful way to continue engaging with customers who are thinking about travel, if not yet able or ready to get out and go.

About 60 percent also view responses to the pandemic by their primary hotel and airline favorably — with unfavorable views in the single digits. This is good news for airlines and hotel companies, as it demonstrates that they have largely been effective at communicating their handling of the crisis.

Exhibit 9. “Thinking about the travel brands that have responded the best in this crisis, what have been the most important components of their response?”

Percent of survey respondents, ranking top three

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanliness and health measures</td>
<td>69%</td>
</tr>
<tr>
<td>Clear and frequent communications</td>
<td>59%</td>
</tr>
<tr>
<td>Flexibility for customers</td>
<td>55%</td>
</tr>
<tr>
<td>Treatment of employees</td>
<td>48%</td>
</tr>
<tr>
<td>Offering promotions</td>
<td>25%</td>
</tr>
<tr>
<td>Donating/supporting community</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
AIR TRAVEL DECISION FACTORS

Post-pandemic, survey respondents in most countries expect that price will continue to be the top factor impacting flight purchase decisions, followed by how travelers were treated by airlines during the pandemic, and stated aircraft cleaning policies (Exhibit 10). The only outlier here is China, where travelers rank price as less important. Clearly, those brands that worked to meet customers' needs during the pandemic will be better positioned to capture the recovery. (This, of course, assumes that respondents' feelings align with their behaviors when they do eventually purchase flights.)

While loyalty program allegiance appears toward the bottom of the list in terms of influencing purchasing decisions, loyalty programs are another way to keep customers engaged when they are not traveling. The lull in travel during the crisis could even be seen as an opportunity for brands to improve the value of their loyalty programs, so as to attract new travelers or a higher share of wallet from existing travelers once the recovery is underway.

When it comes to the airline they fly the most, two-thirds of respondents across countries trust their primary airline's enhanced cleaning procedures, rising to more than 75 percent for China, Spain, and Australia. Airlines have benefited from proactively and frequently communicating enhanced cleaning procedures, including via email, FAQs, and videos.

Exhibit 10. Top three factors influencing flight purchases post-COVID-19
Percent of survey respondents

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>73</td>
</tr>
<tr>
<td>Stated aircraft cleaning policies</td>
<td>60</td>
</tr>
<tr>
<td>Treatment by airline during COVID-19</td>
<td>52</td>
</tr>
<tr>
<td>Onboard experience and amenities</td>
<td>32</td>
</tr>
<tr>
<td>Promotions (e.g., bonus miles)</td>
<td>26</td>
</tr>
<tr>
<td>Loyalty program allegiance</td>
<td>17</td>
</tr>
<tr>
<td>Airport experience and amenities</td>
<td>15</td>
</tr>
</tbody>
</table>

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
When it comes to deciding to fly, respondents rank both airport and airline enhanced health and cleaning procedures as most important. Airports have a critical role to play in getting people in the air again and will need to work closely with airlines to protect travelers and staff and minimize the spread of COVID-19. For example, Changi Airport in Singapore has deployed more than 1,200 hand sanitizers across the airport and disinfects high-contact areas up to four times a day, while a wide range of surfaces are being treated with a long-lasting antimicrobial agent. Hong Kong Airport is using robots to vacuum floors and sterilize surfaces. Malpensa Airport in Italy has introduced 24-hour cleaning, reduced terminal capacity, and requires departing passengers to arrive earlier to verify compliance with government travel guidelines.

**HOSPITALITY DECISION FACTORS**

In terms of post-pandemic lodging decisions, 83 percent of travelers are just as likely or more likely to stay at a large hotel, compared to 57 percent for home rentals (such as Airbnb). Chinese respondents overwhelmingly say they are now more likely to stay at a large hotel when the outbreak ends, possibly driven by a desire to stick with trusted brands and stay away from the less-regulated sharing economy (Exhibit 11).

**Exhibit 11. “When the COVID-19 outbreak ends, how likely are you to stay at a large hotel versus a home rental?”**

Percent of survey respondents

<table>
<thead>
<tr>
<th>Country</th>
<th>Large hotels</th>
<th>Home rentals (e.g., Airbnb, Vrbo)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>More likely</td>
<td>More likely</td>
</tr>
<tr>
<td>Canada</td>
<td>Just likely</td>
<td>Just likely</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Just likely</td>
<td>Just likely</td>
</tr>
<tr>
<td>Spain</td>
<td>Less likely</td>
<td>Less likely</td>
</tr>
<tr>
<td>France</td>
<td>Just likely</td>
<td>Just likely</td>
</tr>
<tr>
<td>Germany</td>
<td>Just likely</td>
<td>Just likely</td>
</tr>
<tr>
<td>Italy</td>
<td>Just likely</td>
<td>Just likely</td>
</tr>
<tr>
<td>China</td>
<td>Less likely</td>
<td>Less likely</td>
</tr>
<tr>
<td>Australia</td>
<td>Just likely</td>
<td>Just likely</td>
</tr>
</tbody>
</table>

Source: Oliver Wyman Traveler Sentiment Survey, Edition 1
When it comes to deciding to stay at a hotel, improvements in health and cleaning for rooms and public spaces have an impact on decision making for 69 percent of travelers — with price dropping to second place (65 percent). More than half would favor hotels that offer the ability to go straight to one's room, with no human interaction, an option made increasingly possible through mobile check-in/check-out and mobile keys.

Similar to airlines, respondents cited price and cleaning policies as key factors in selecting which hotel to stay at once the outbreak ends. Location preference and treatment by the hotel brand during the COVID-19 outbreak matter as well. Promotions, branding, and loyalty are less important in traveler decision making, but of course do matter in terms of continued engagement.

Almost 70 percent of travelers trust their favorite hotel brand's enhanced cleaning policies, with travelers from China and Spain the most reassured. Hotel groups, like airlines, have continued to communicate with travelers about enhanced cleaning procedures as the pandemic has unfolded, which is yielding positive results in terms of traveler comfort levels.

Just like airlines and airports, hotels must plan on customer and staff protection measures to benefit from the recovery. Key measures could include high-tech cleaning tools, such as germ-zapping robots and electrostatic sprayers for cleaning and disinfecting; social distancing by reducing furniture in lobbies and public rooms; “quarantine rooms” for guests who fail a temperature check; and making housekeeping and hand sanitizers more visible.
GLIMPSES OF RECOVERY

To conclude, the results of Edition 1 of our traveler sentiment survey were more positive than we expected. We are cautiously optimistic that travel demand will return over time as governments lift restrictions. Tourism is vital to many economies, which means that both governments and businesses need to put exacting health and cleanliness measures into place to make travelers feel at ease and protect public health.

We believe the recovery will be led by leisure demand, although those traveling are likely to stay closer to home, visiting domestic or nearby international destinations. This implies long-haul networks may take more time to recover or could recover asymmetrically, due to differing public health situations at origins and destinations.

We also are encouraged that many business travelers expect to return to traveling, but there are headwinds: more people working from home in the future and the potential for reduced business travel spend. Still, an increasing number of companies have announced “work from wherever” options, which might offer the opportunity to relocate and travel while working remotely.

Travelers do feel relatively comfortable about returning to a number of travel and lodging options, driven by airlines and hotel brands that have done a good job of communicating with travelers and handling the crisis. But travelers are still uncomfortable with activities that might involve exposure to large groups of people. They also are more reluctant to return to the sharing economy, where standardization of cleanliness might seem less assured.

Enhancements in health and cleaning on aircraft, at airports, in hotels, and at tourist destinations and venues not only will continue to be important to get people traveling again, but could be differentiators for travelers looking for assurances that cleaning and health are receiving the highest priority. Brands that can standardize processes, exert quality control, and successfully communicate improvements to travelers will be best poised to take advantage of the recovery.

As countries open back up, we will be launching Edition 2 of the survey. The next survey will enable us to gauge the pace at which traveler sentiments are shifting and the potential long-term, structural impacts that may result from the pandemic.
ABOUT THE SURVEY

The traveler sentiment survey (Edition 1) was administered to a nationally representative sample of the population by using profiled data and confirming demographic data within the survey. Quota caps were monitored and adjusted live during fielding to achieve demographic representation. Respondents took one or more roundtrip flights in 2019 and frequent traveler respondents took four or more roundtrip flights in 2019. The survey was conducted between April 24 and May 10, 2020 and involved nearly 4,600 total respondents across nine countries (United States, United Kingdom, Canada, Germany, France, Spain, Italy, Australia, and China.) The majority of travelers took between one and three flights in 2019; in addition, 30 to 40 percent of respondents spent 20 or more nights in a hotel in 2019. Less than half of respondents were 45 or older, except in China, where the distribution skewed younger. The Edition 2 survey is planned for July 2020.
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