

TTC INSIGHTS

Martin Alcock

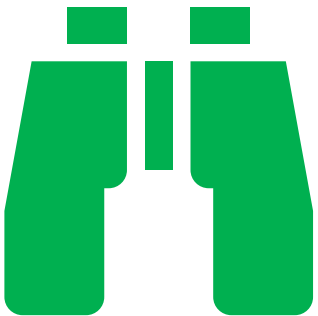
April 2021



On returning to the UK

	Green	Amber	Red
Passenger locator form	Yes	Yes	Yes
Pre-departure test	Yes	Yes	Yes
Managed quarantine at hotel	No	No	10 days
Self-isolation	No	10 days	N/A
Test to release	N/A	On day 5	No
PCR test	On or before day 2	On or before day 2	On or before day 2
Further PCR test	No	Day 8	Day 8

The Green watchlist



A list of countries most at risk of moving from **green** to **amber**

Short term timetable

17 May

Before 17th May

- Confirm International Travel opening date of 17th
- Publish Green, Amber and Red country lists
- Publish Tourism Recovery Plan
- Publish COVID 19 Passenger Charter

28 June

31 July

1 October

Government review rules in the light of:

- Vaccine roll-out success
- Hospitalisations and deaths still reducing
- No surge in infection rates
- No new Variants of Concern



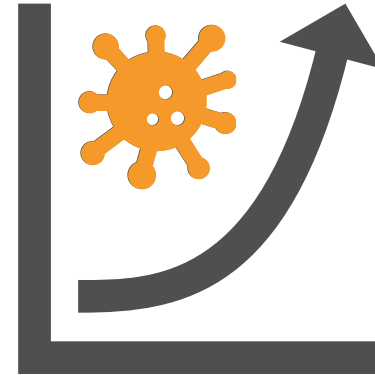
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Questions to be answered

- Which countries will be on which list?



Vaccination rate



Infection rate



Prevalence of
Variants of
Concern



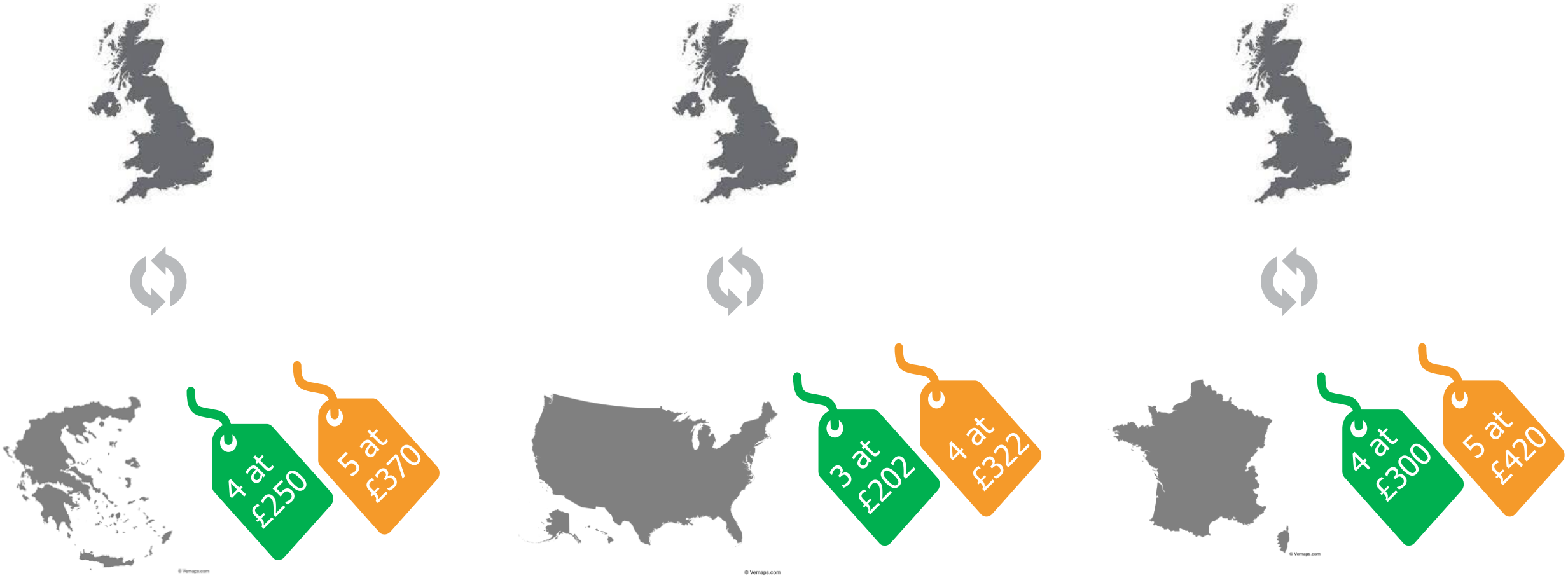
Genomic
sequencing
capabilities



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Questions to be answered

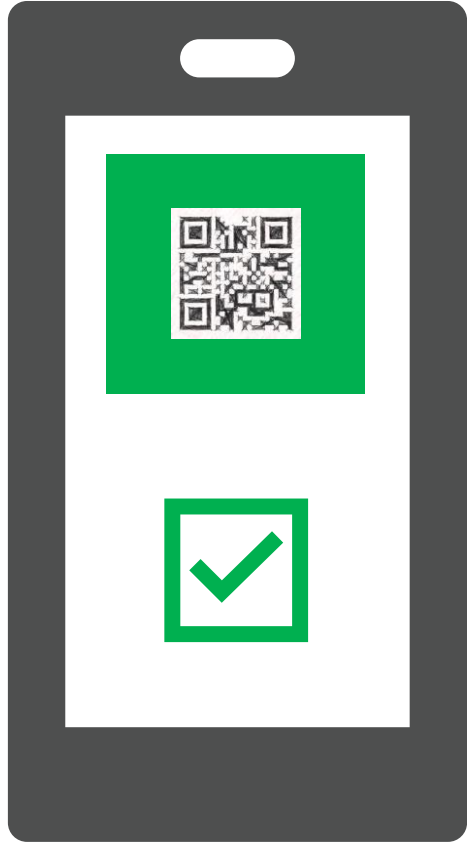
- Can price of testing be reduced?



Source: Which Report, March 2021

Questions to be answered

- What role will “Digitisation” play



Enable residents to **prove their COVID-19 status for tests and, if necessary, vaccines** for outbound travel to a third country.

Continued international engagement to develop a seamless future travel system based on global standards, and **secure interoperable digital solutions** for vaccine and testing certification

We will play a leading role in development of international standards around a **digital travel certification system** that can enable travellers to evidence their COVID-19 status to demonstrate they meet public health entry requirements

The **NHS is developing a digital and non-digital solution** for individuals to demonstrate COVID-19 status



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Questions to be answered

- What will The COVID 19 Passenger Charter cover?



- “**Clarity to consumers** will be cemented through a new COVID-19 passenger charter”
- “....clearly sets out **consumer rights and responsibilities** when booking travel while COVID-19 measures remain in place.”
- “We will also **outline these rights and responsibilities to the travel industry.**”
- “We **expect the industry to be flexible** in recognition of the impact the pandemic has on consumers’ bookings”



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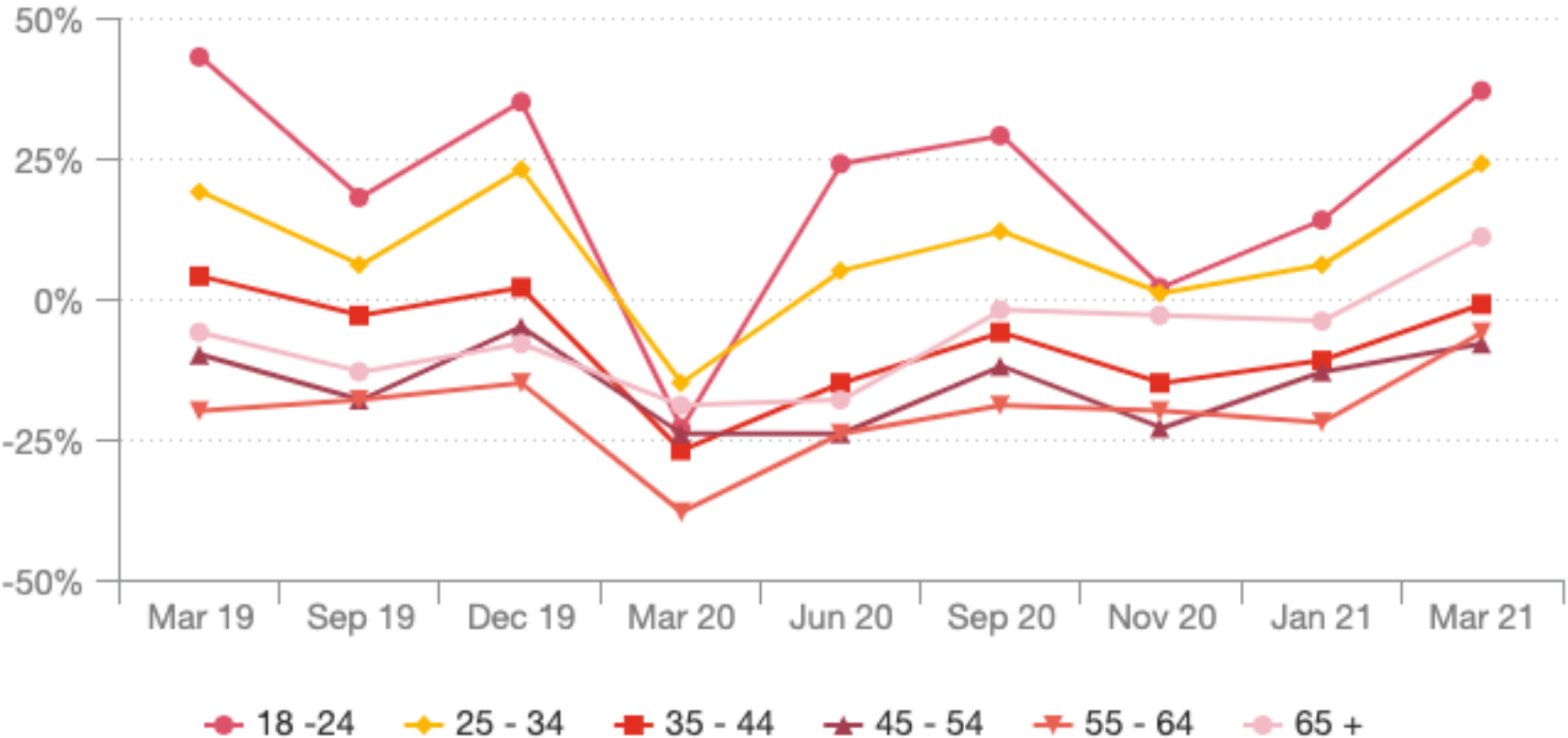
Safe Sustainable Robust



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Consumer confidence growing

- Fastest growth amongst oldest and youngest



Source: PwC Consumer Sentiment Index, March 2021



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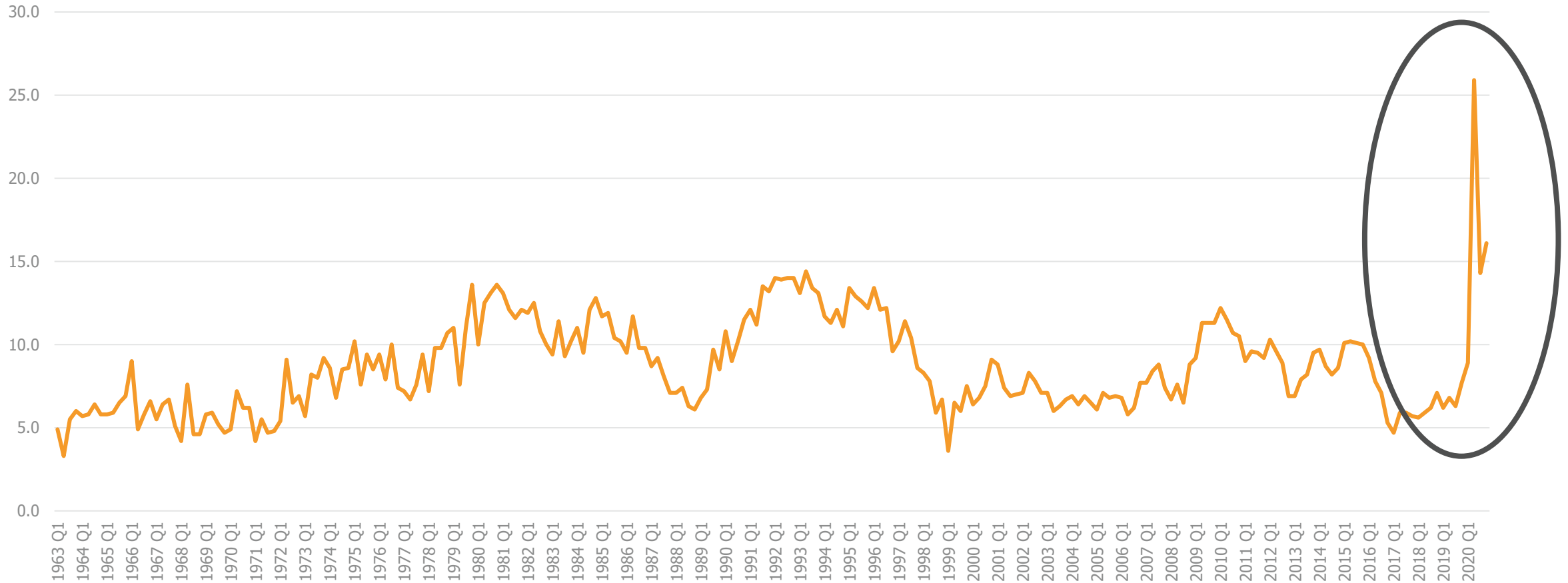
Mass unemployment has been avoided*

* So far 🙌



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Households have money to spend



Source: ONS Household Savings Ratio Mar 2021

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NETFLIX

Are you still watching?

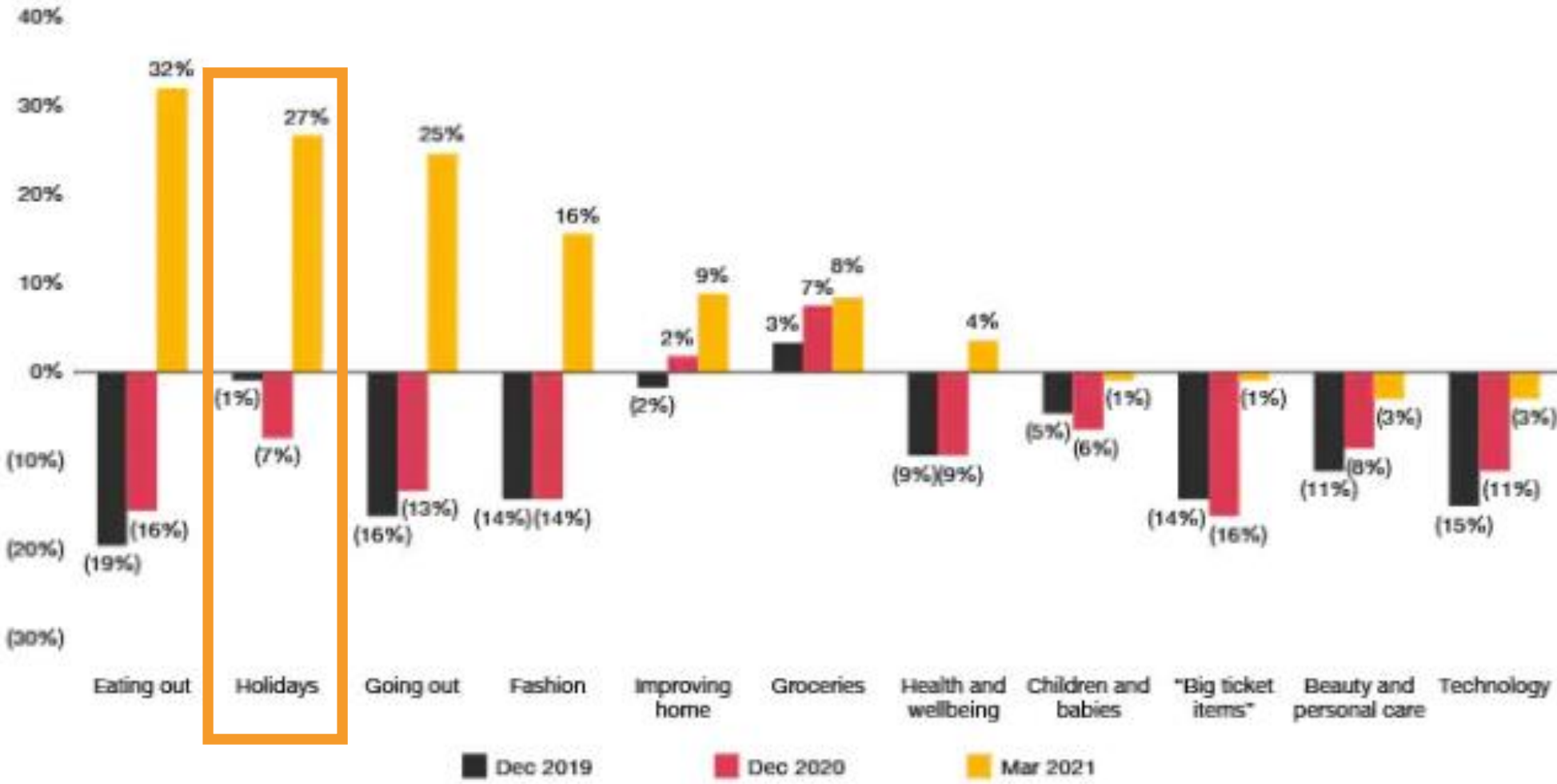
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THE TRAVEL TRADE CONSULTANCY

Spending intentions in the next 12 months



Source: PwC Consumer Sentiment Index, March 2021



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51%

of those surveyed who travelled abroad for leisure in 2019 **feel comfortable going on a leisure trip abroad** between June-September 2021

54%

of 2019 international leisure travellers surveyed say they would be **likely to travel** if there were no restrictions in either the UK or abroad



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Source: DfT/ Ipsos MORI Travel Survey, March 2021

Long awaited industry rallying cry

“I’m **not** advising people
not to book to go away”

Rt Hon Grant Shapps
9 April 2021



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28%

of 2019 international leisure travellers surveyed say they would be likely to travel abroad if they **had to quarantine in their own home for 10 days** on arrival to the UK

68%

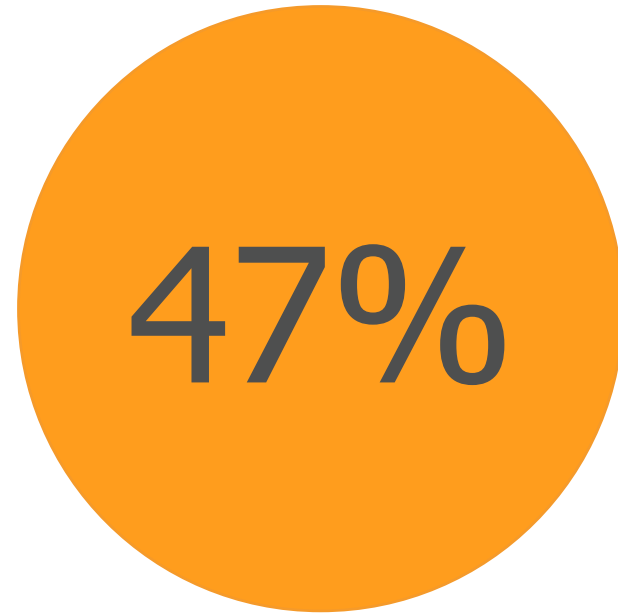
of UK adults surveyed agree that they will only travel abroad when they feel totally confident that the **restrictions won't change**



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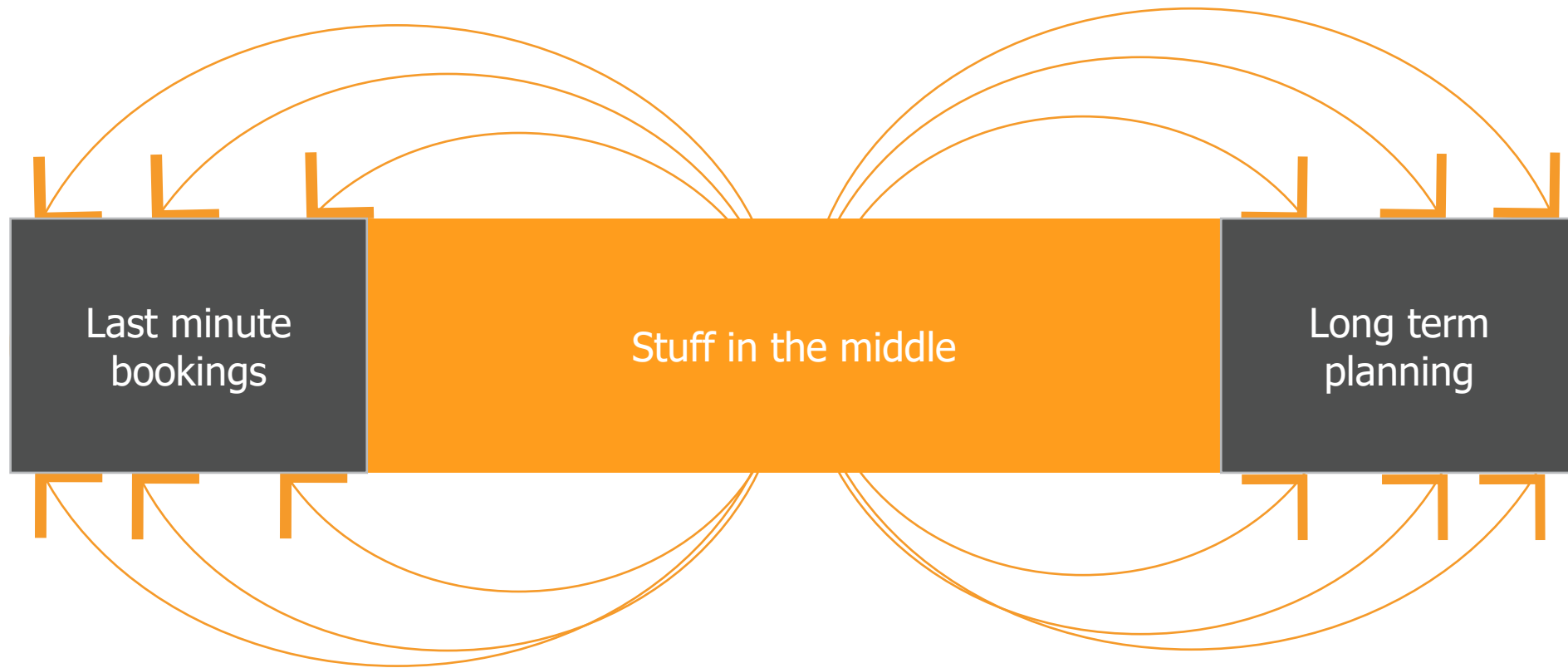
Source: DfT/ Ipsos MORI Travel Survey, March 2021

In 2021, IATA predict total flights will be



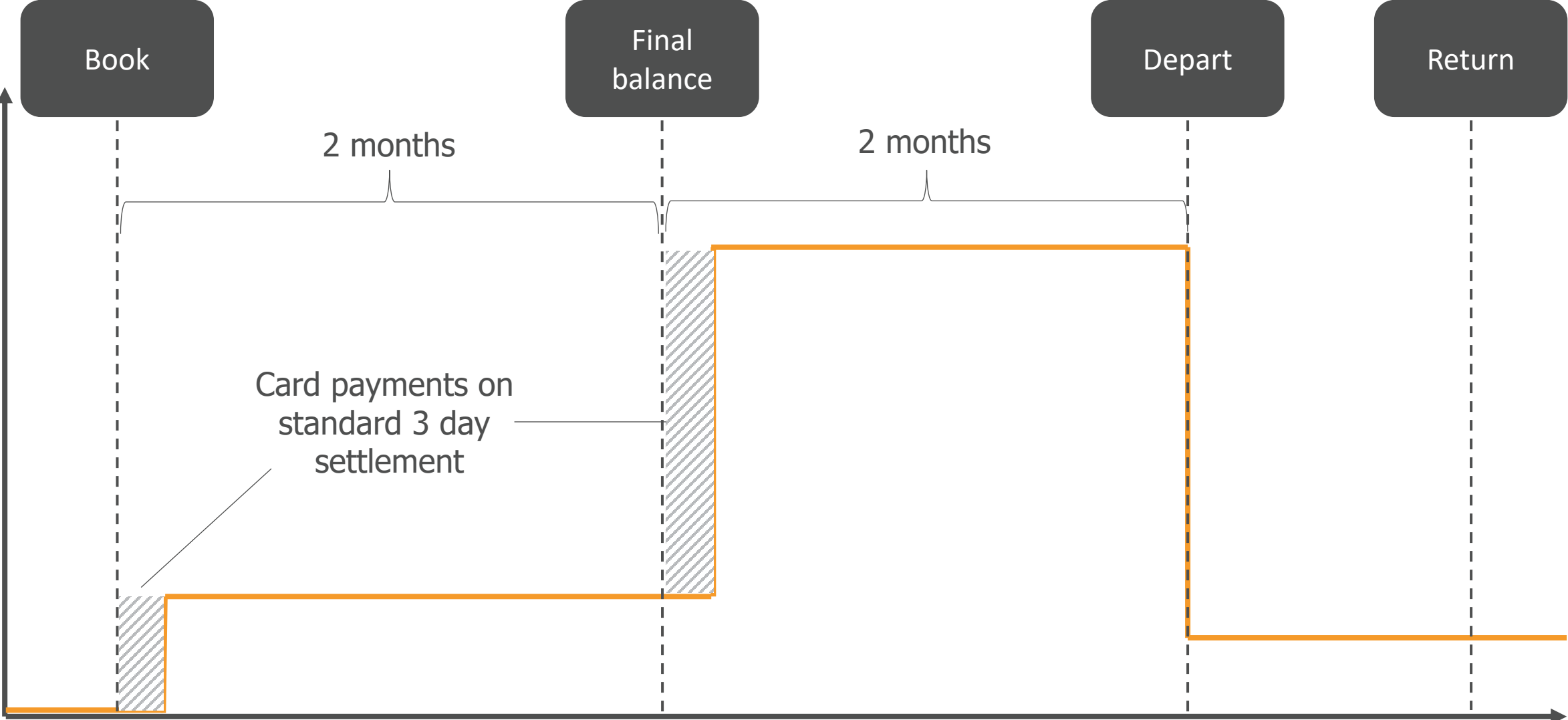
Of 2019 levels

Polarisation of bookings



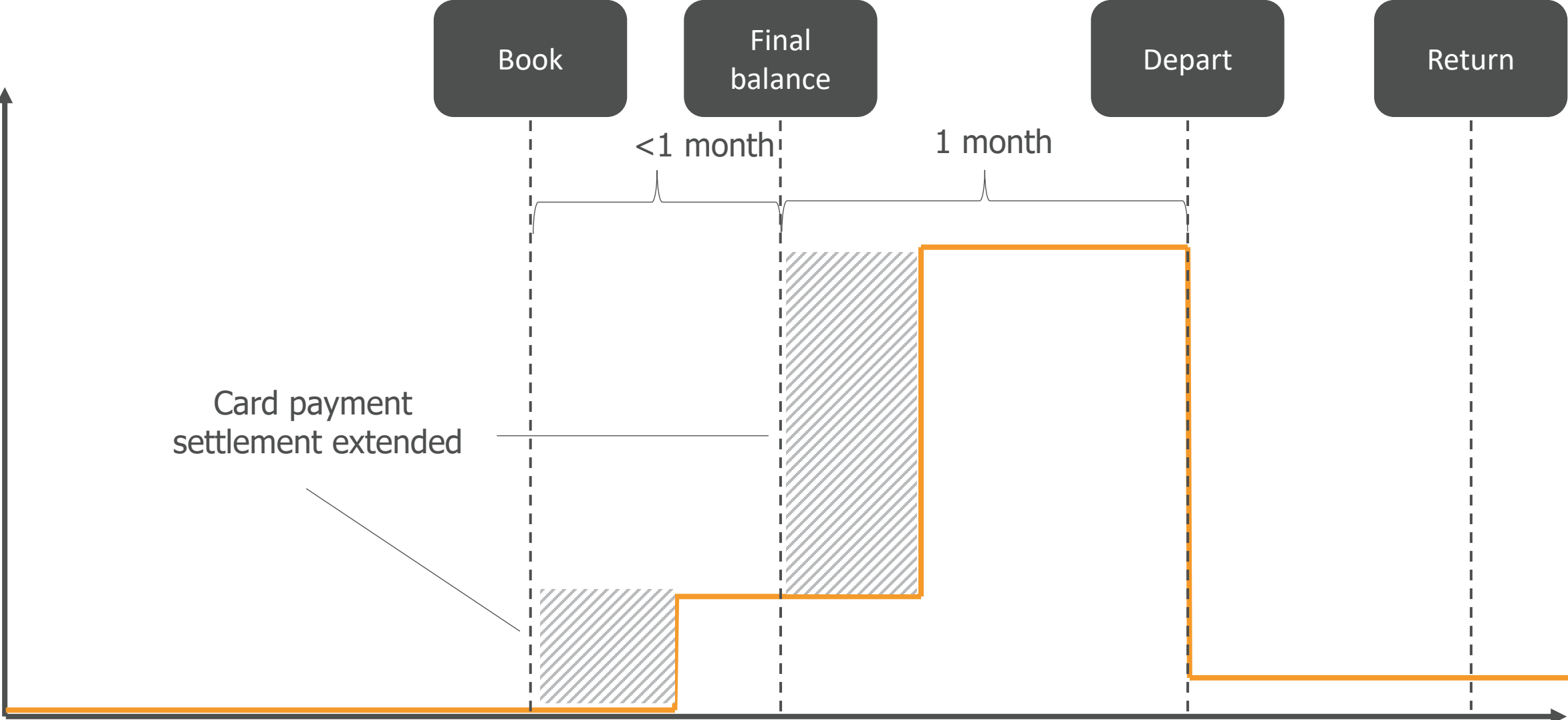
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Cash cycle: Pre-pandemic



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Cash cycle: Now



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The squeeze on liquidity



Later booking profile
Deteriorating card settlement terms
Commercial pressure to collect balances later

But also...

Refund claims
Final balance delinquencies
Security and collateral for regulators, insurers etc
Servicing debts
Supply chain defaults



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Thanks for watching!

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