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# Covid 19 International Market Update

January 26, 2021





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**Carroll Rheem**  
VP, Research & Analytics

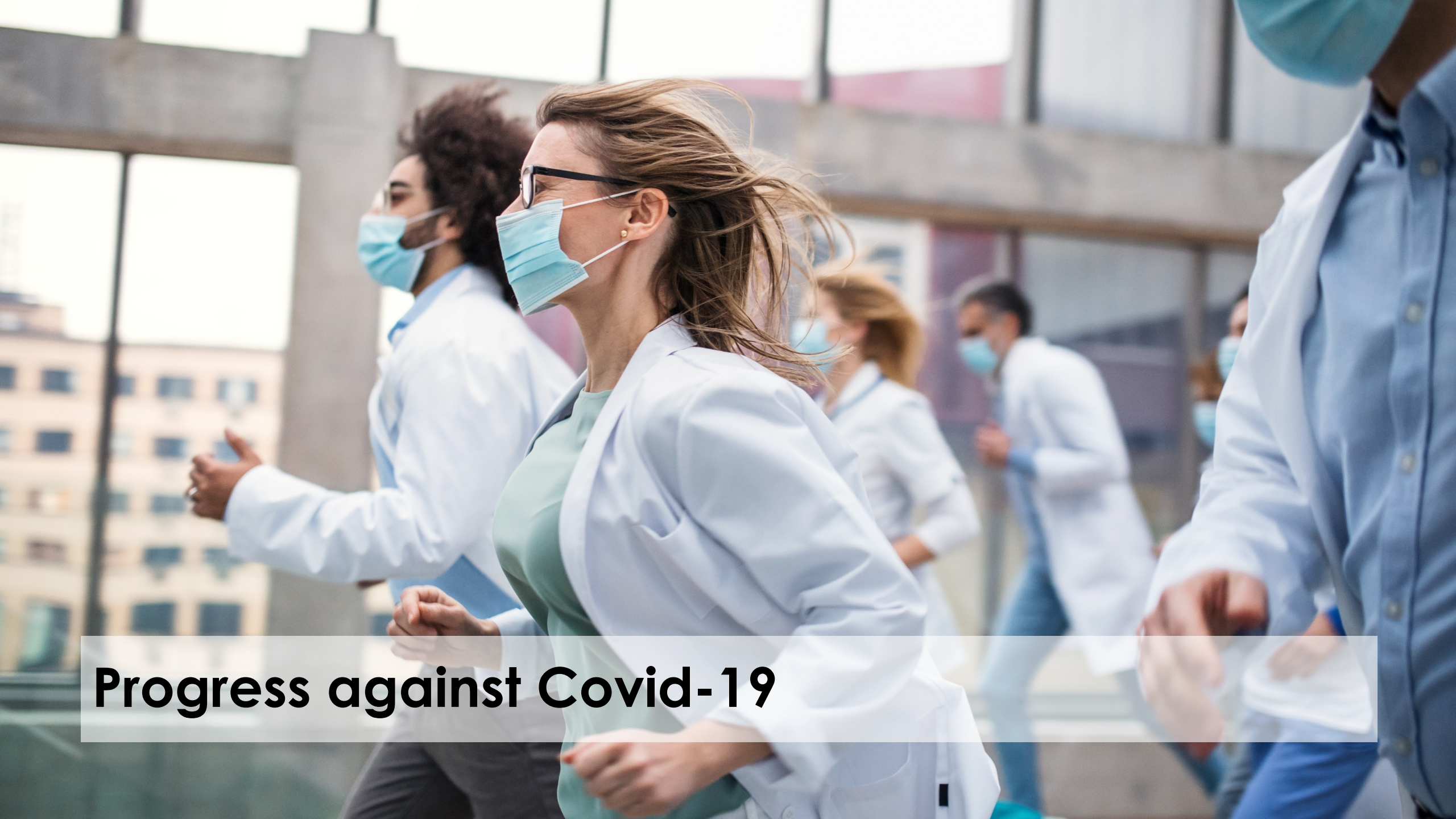




GOODBYE



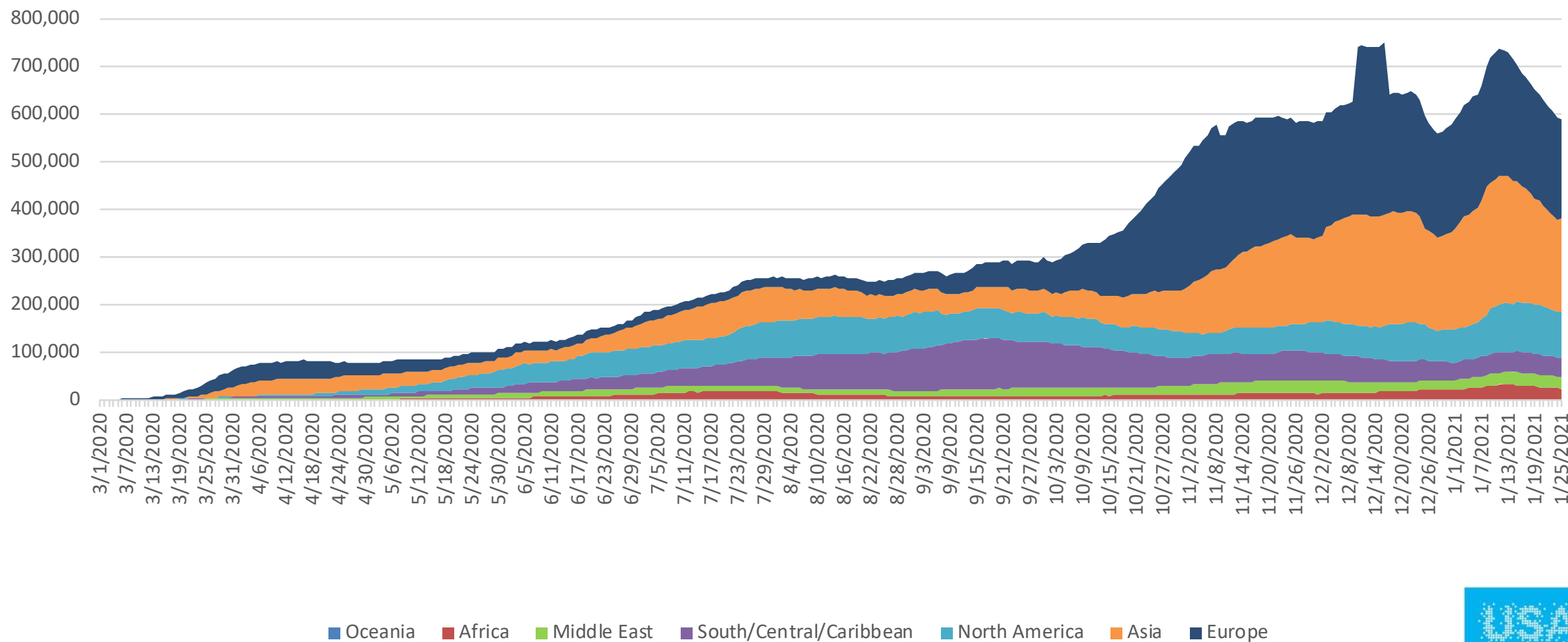




**Progress against Covid-19**



# New Confirmed Cases (rolling average over 7 days)

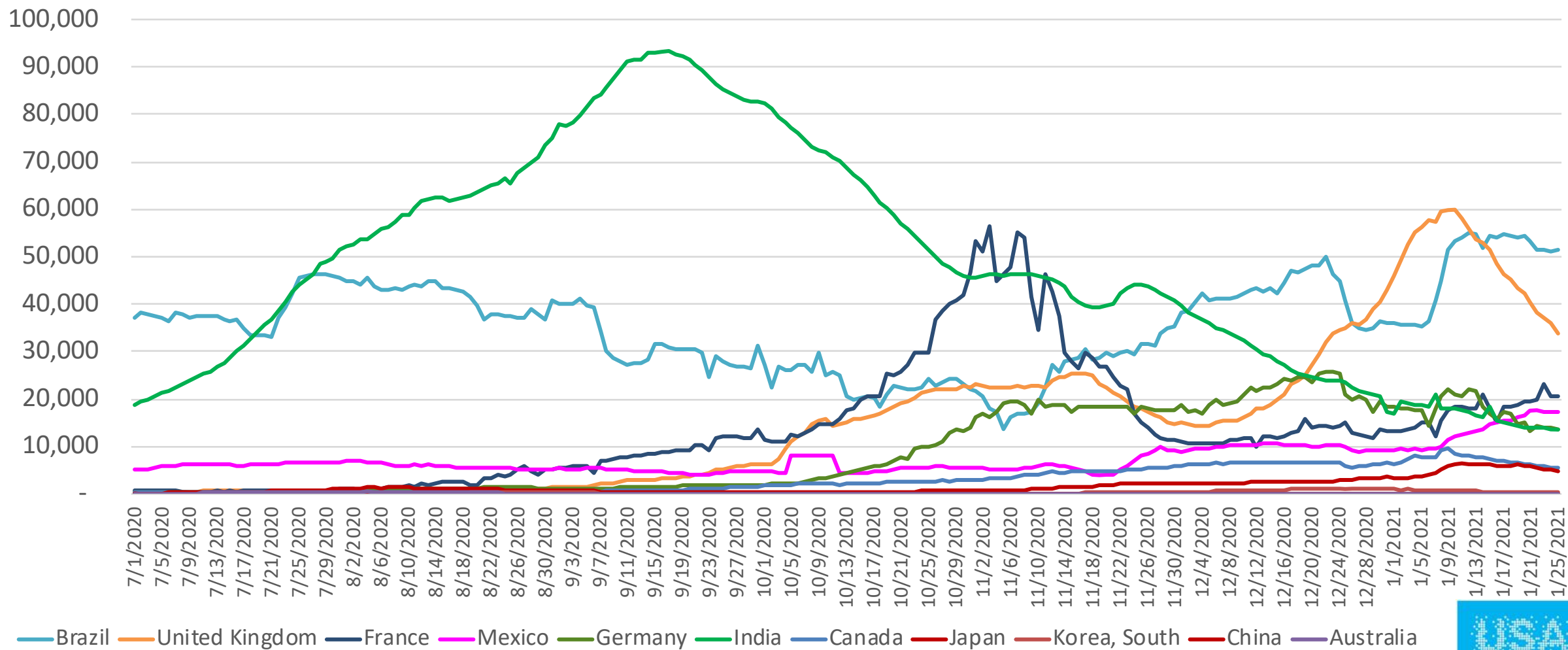


Source: Johns Hopkins





# Daily New Confirmed Cases (rolling average over 7 days)



Source: Johns Hopkins







# Vaccine Related Information Resources

Duke Global Health Innovation Center

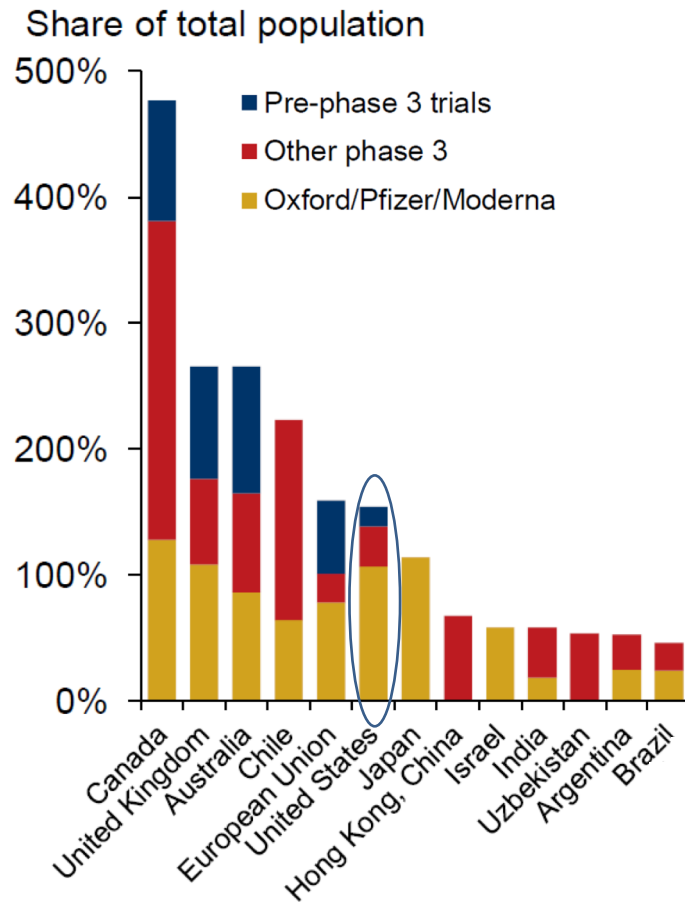
<https://launchandscalefaster.org/COVID-19>

Bloomberg Vaccine Tracker

<https://www.bloomberg.com/graphics/covid-vaccine-tracker-global-distribution/>

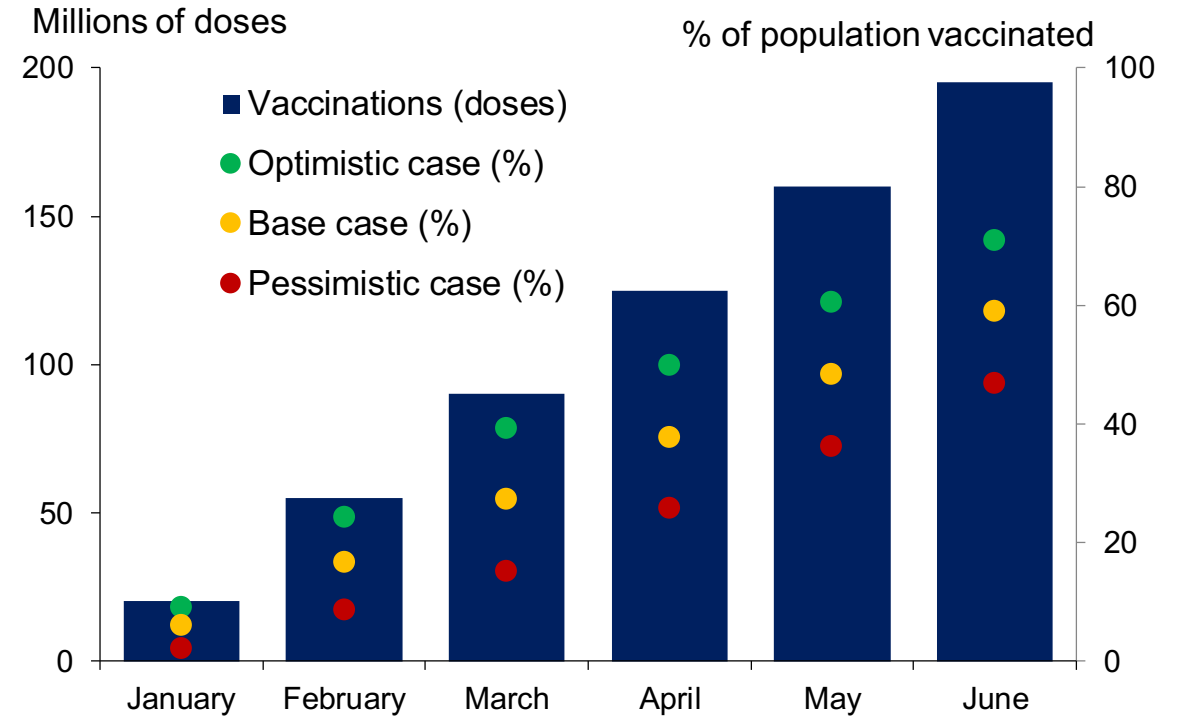


## Covid-19 confirmed vaccine orders



Source: Oxford Economics/Duke Global Health Innovation Centre  
 \*Assumes two doses for all vaccines

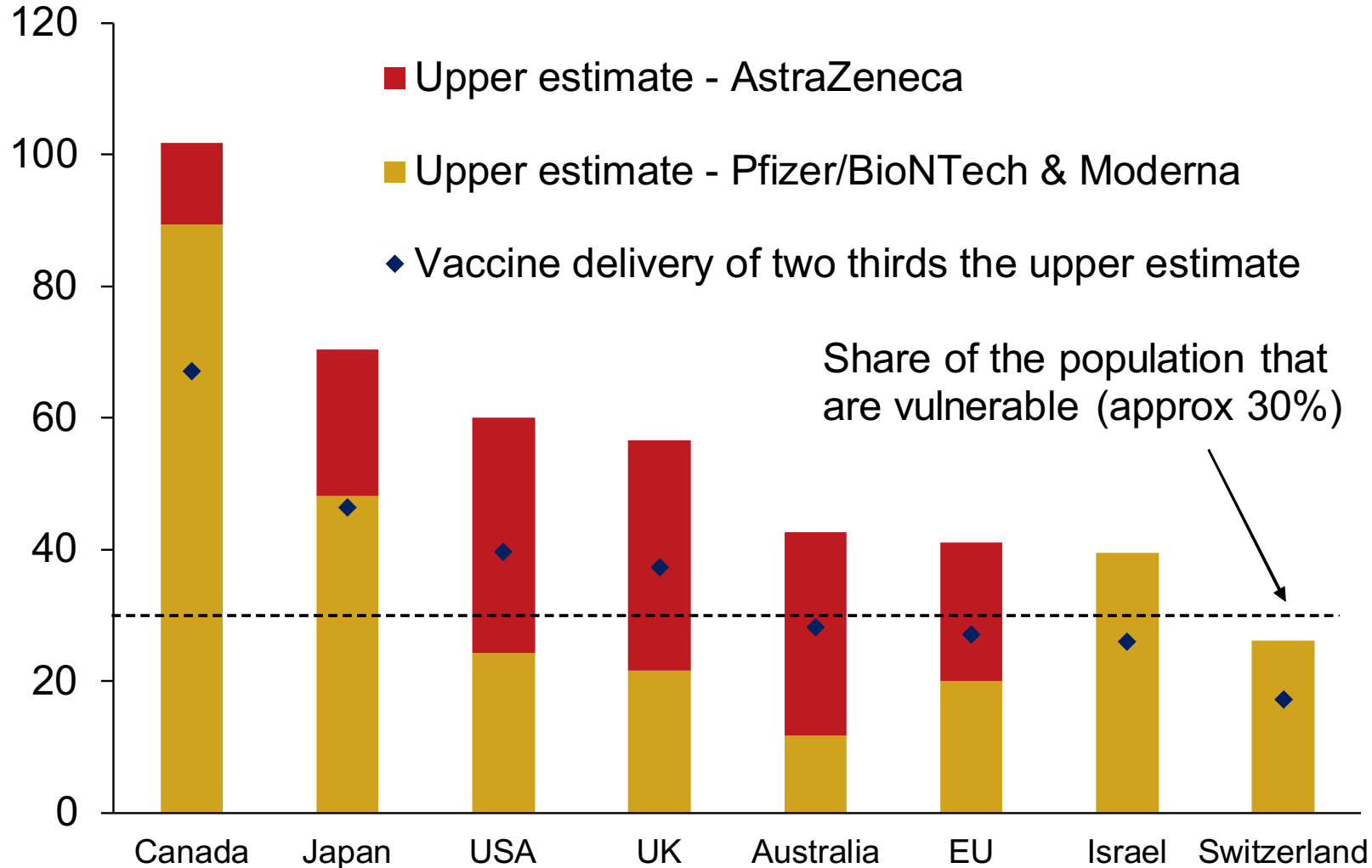
## US: Estimated vaccine distribution



Source: Oxford Economics/CDC

# Possible scale of vaccinations by end Q1 2021

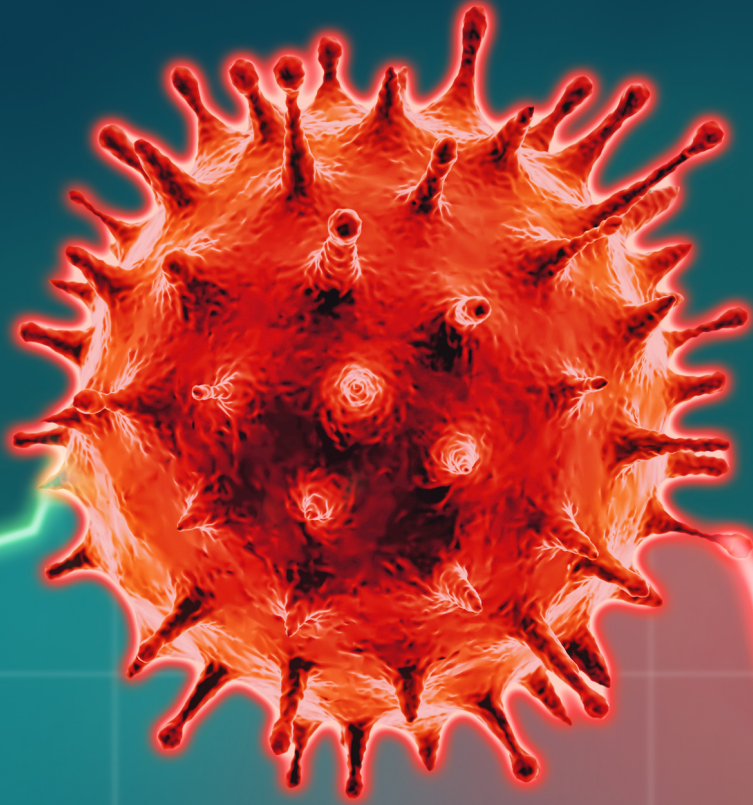
% of the population (AstraZenca/Pfizer/Moderna vaccine only)



Source : Oxford Economics /Duke Global Health Innovation Centre / AstraZeneca / Pfizer / Moderna / Lancet



# Economic Impact

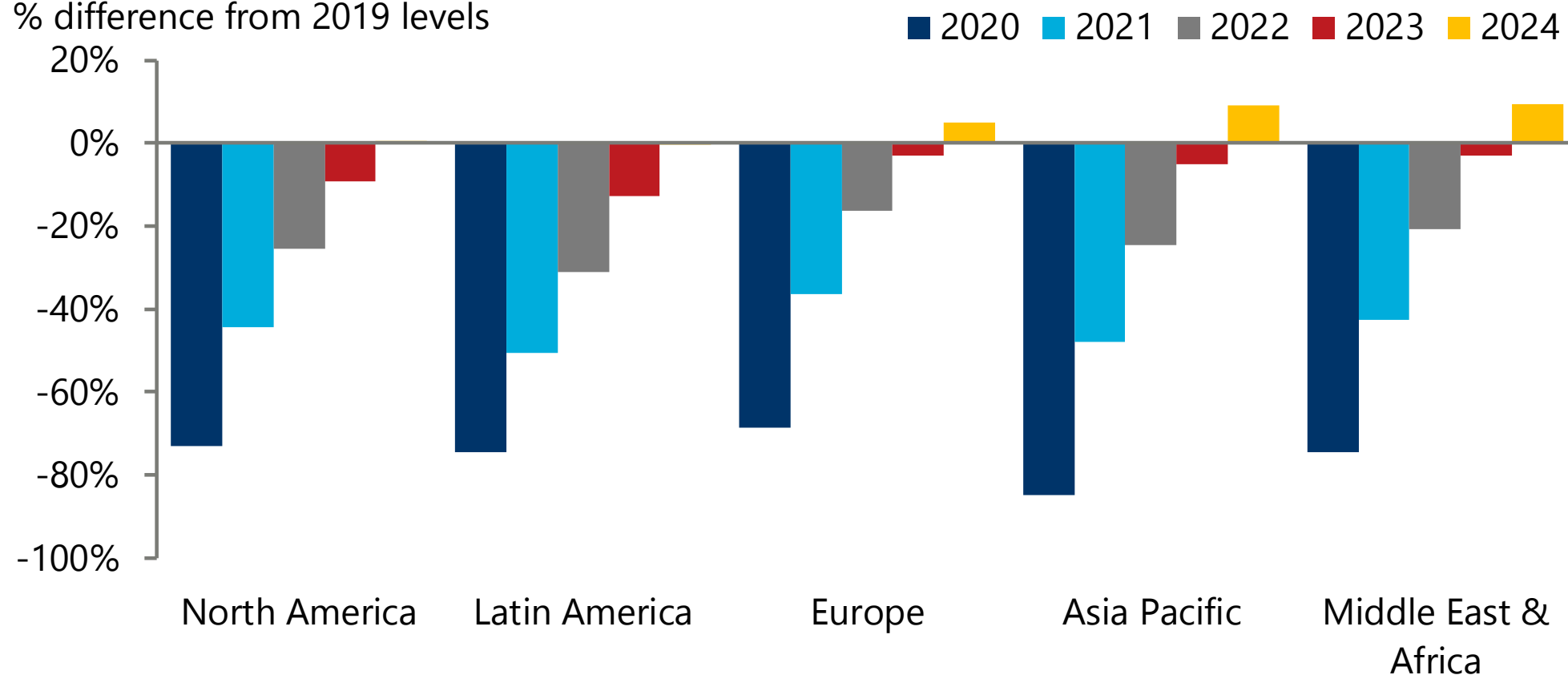




# Rapid travel rebound, but not immediate recovery

## Global inbound travel by destination region

% difference from 2019 levels



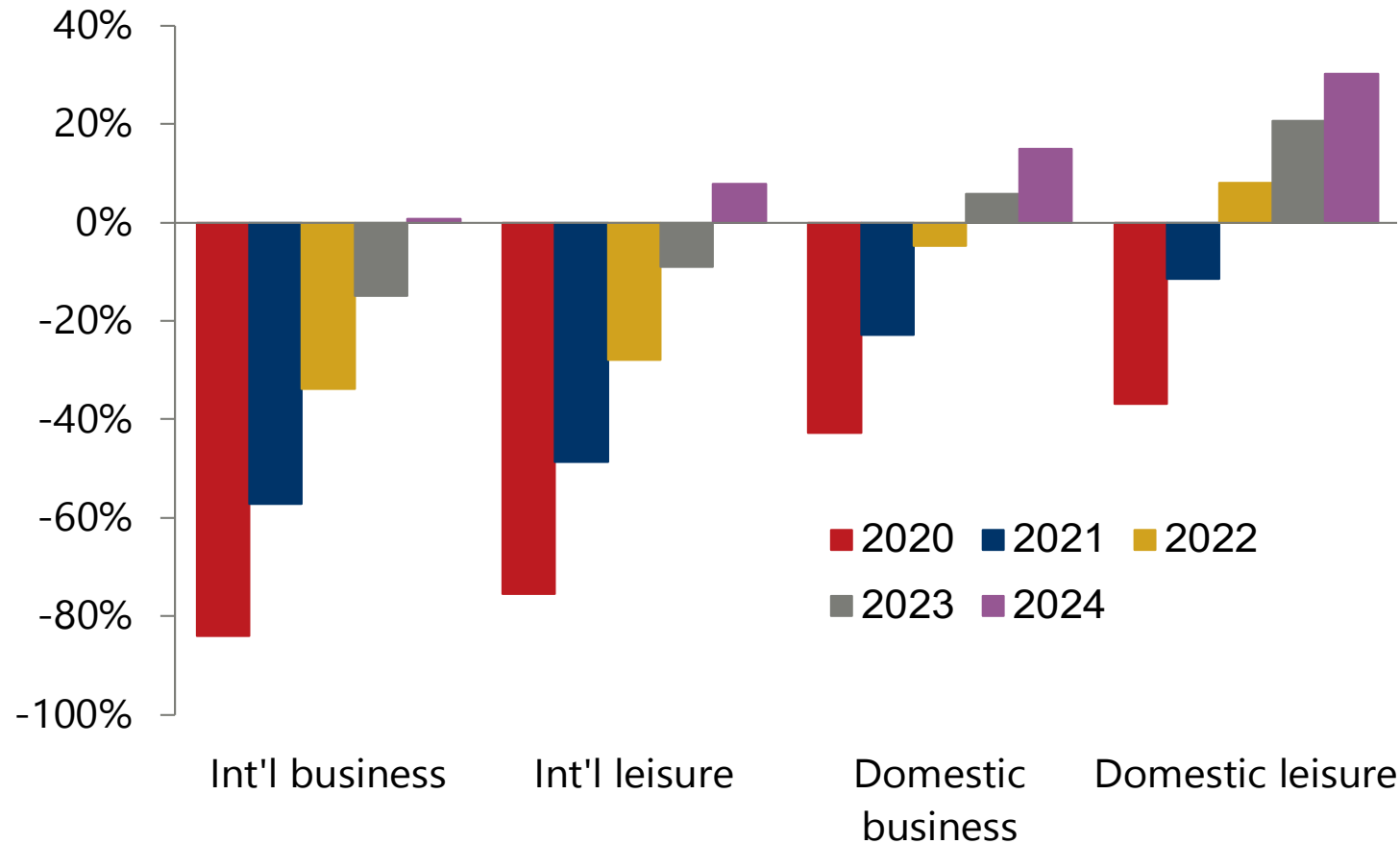
Source: Tourism Economics



# Segment recovery will vary widely

## Global travel spend by segment

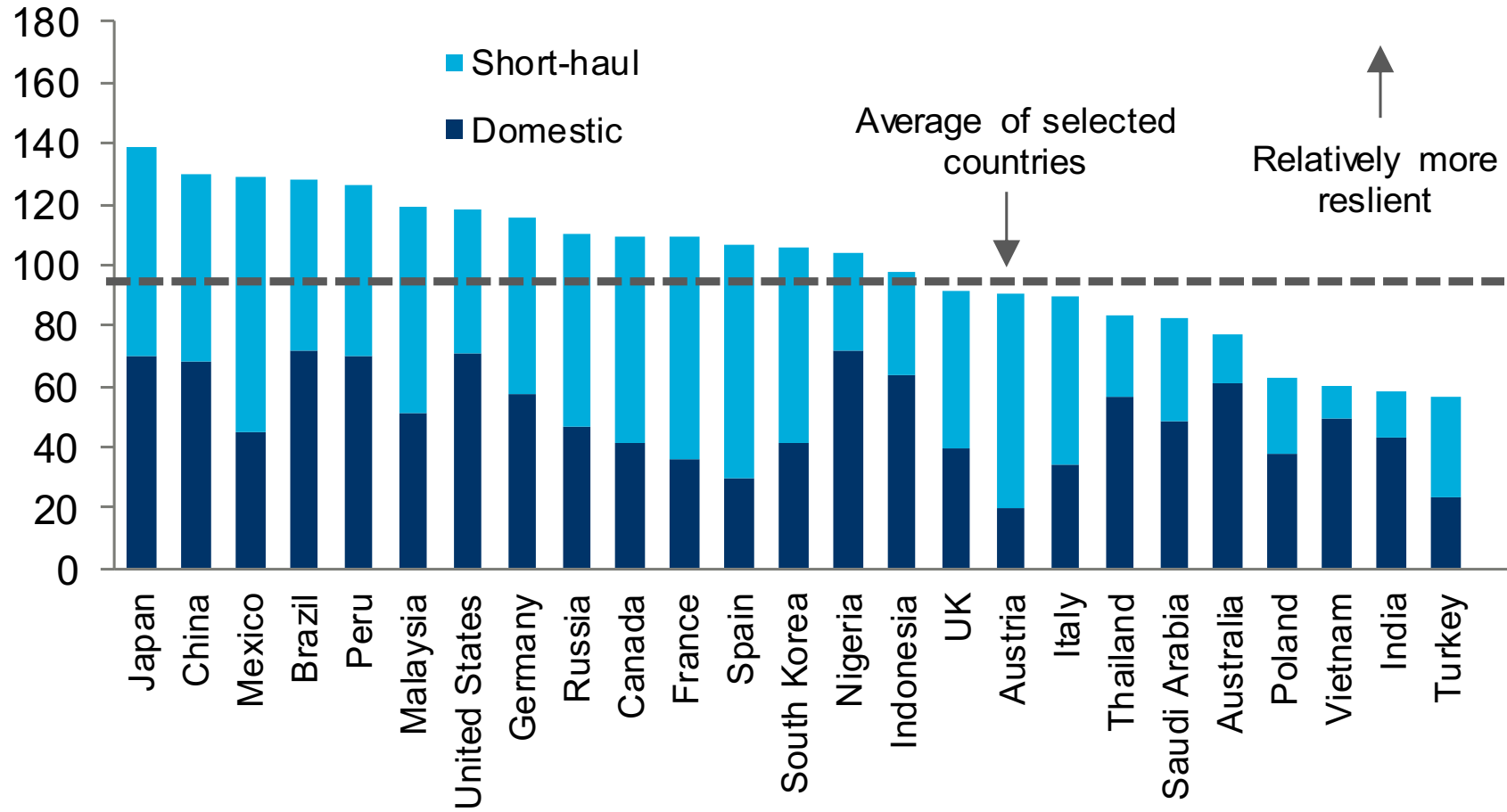
% difference from 2019 levels



Source: Tourism Economics

# Recovery will favour those with large domestic and regional market

Travel Resilience Combined Index - Equal Weighting of Components\*



\*2019 data; overnight travel only  
Source: Tourism Economics



# Consumer Sentiment





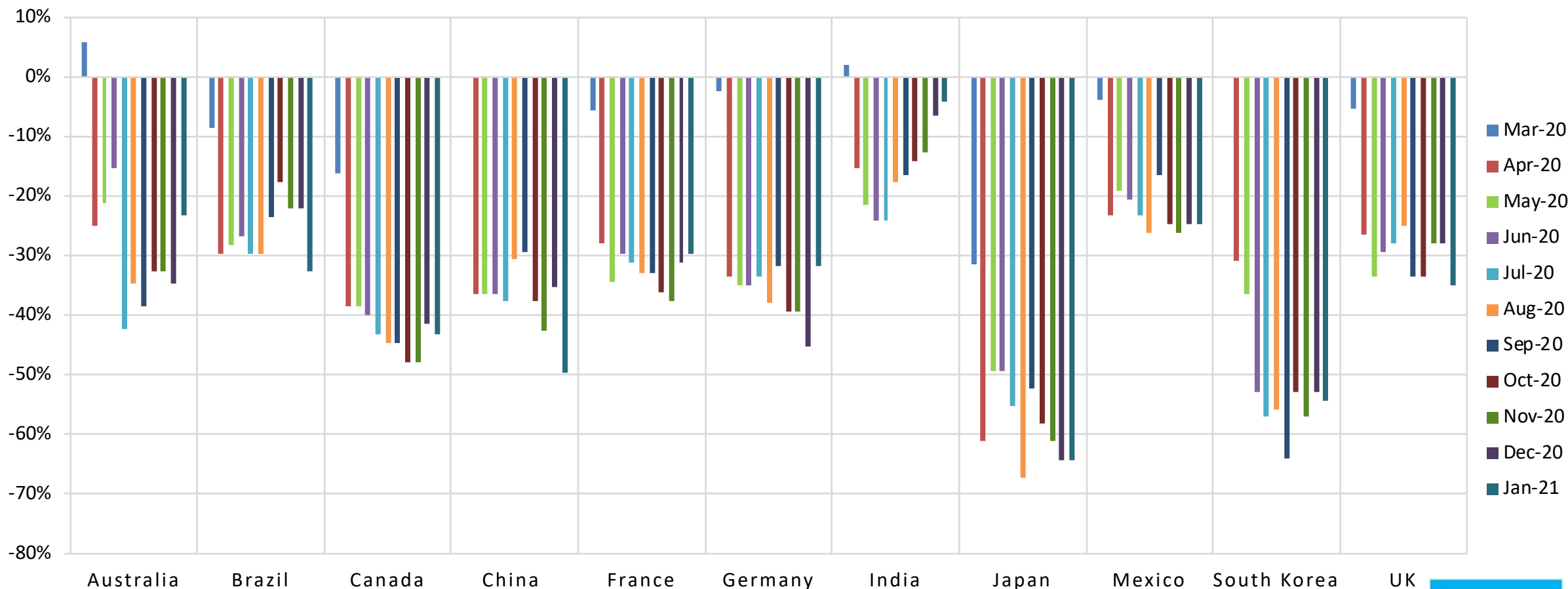
I'm still here...





# Likelihood to Travel Internationally in the Next 12 months

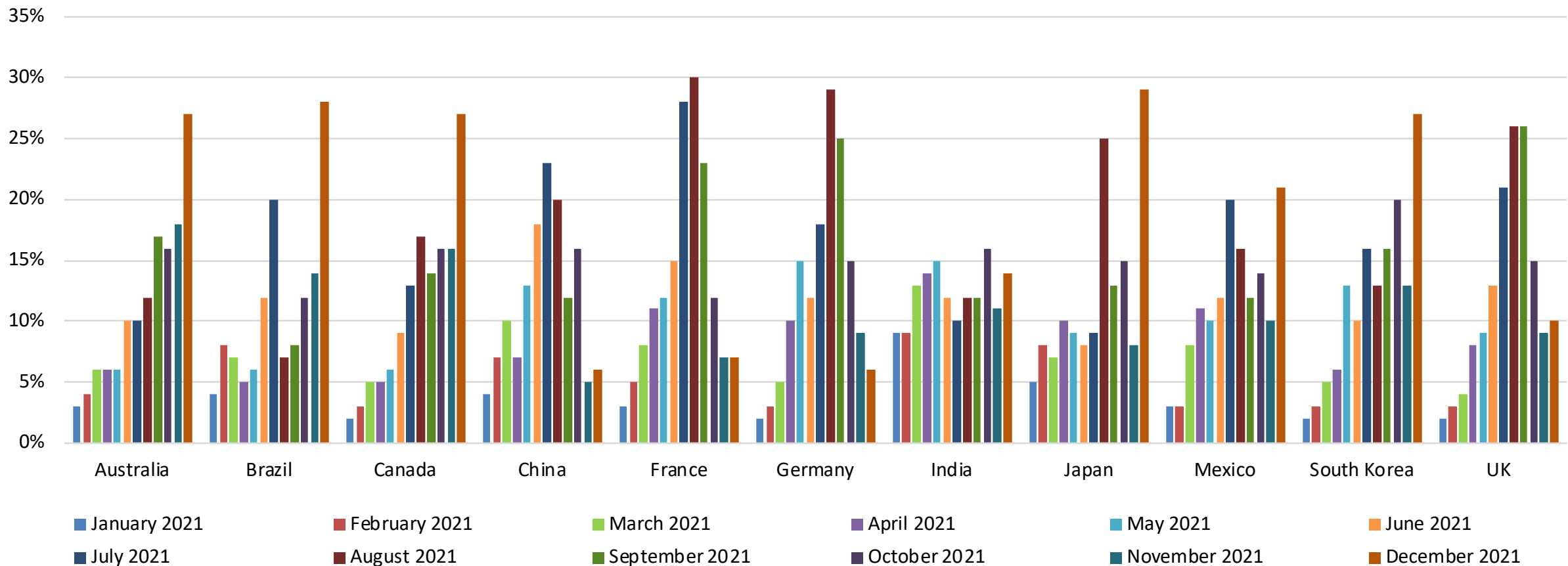
## (% Change over 2019 average)



Base: All respondents  
Source: Engine/ORC Custom Study



# International Trip: Planning Departure Month (January 2021) (Next 12 Months)



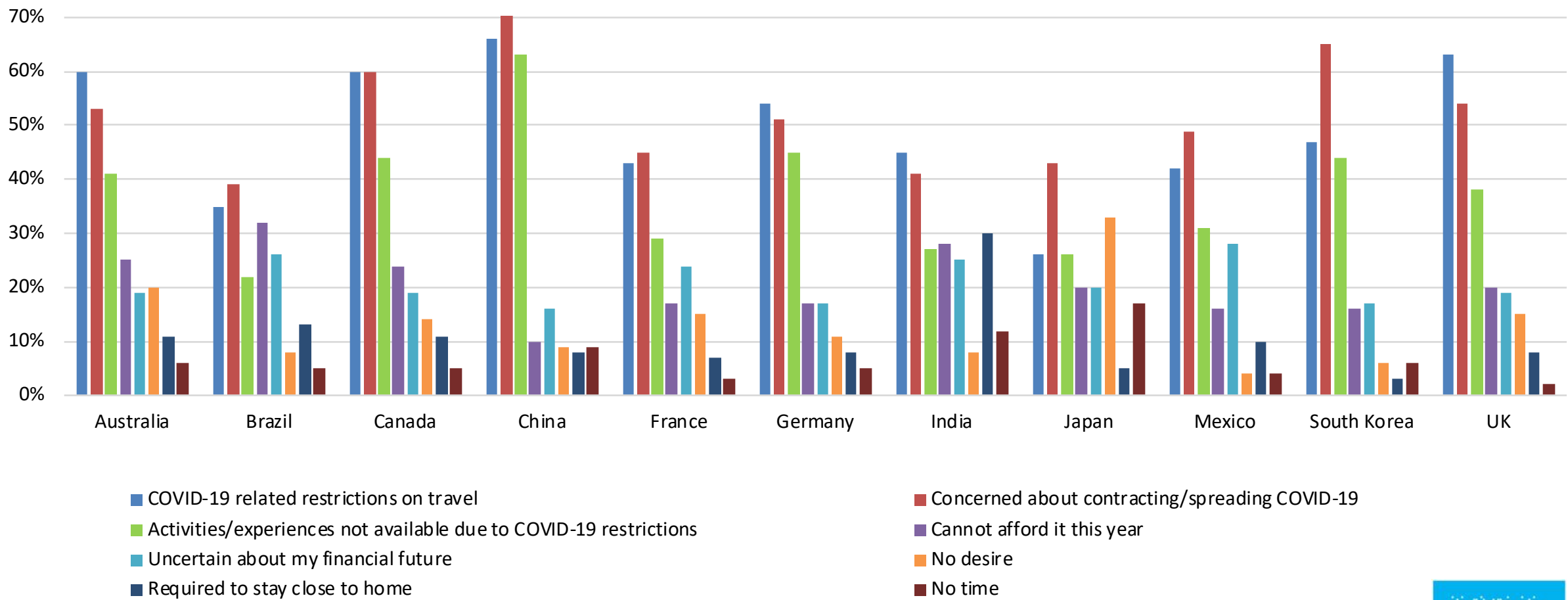
Base: All respondents  
Source: Engine/ORC Custom Study







# Reasons for Not Traveling Internationally in the Next 12 Months: January 2021



\*Concerned about contracting/spreading COVID-19 replaced “Concerned about the Spread of COVID-19”

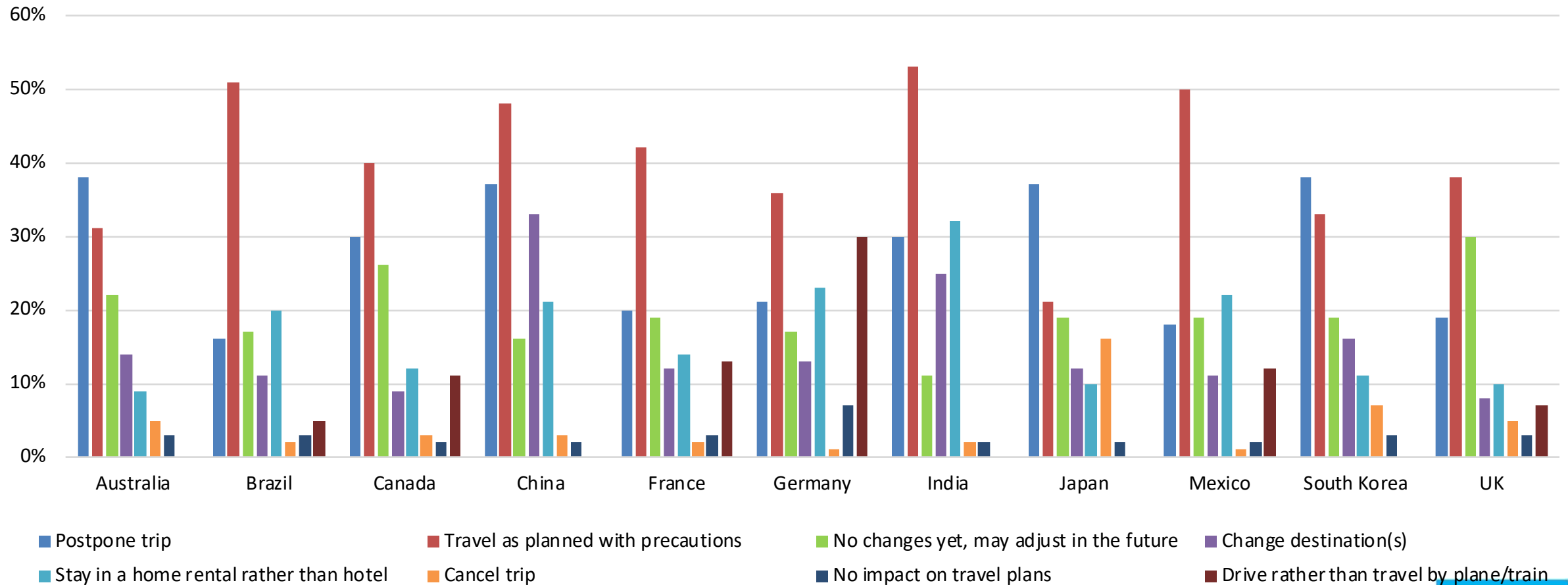
Base: Respondents who are unsure/unlikely to take an international trip in the next 12 months

Source: Engine/ORC Custom Study





# Travel Changes due to COVID-19: January 2021



\*Driving was excluded in Australia, China, India, Japan and Korea

Base: Respondents who are likely to take an international trip in the next 12 months

Source: Engine/ORC Custom Study







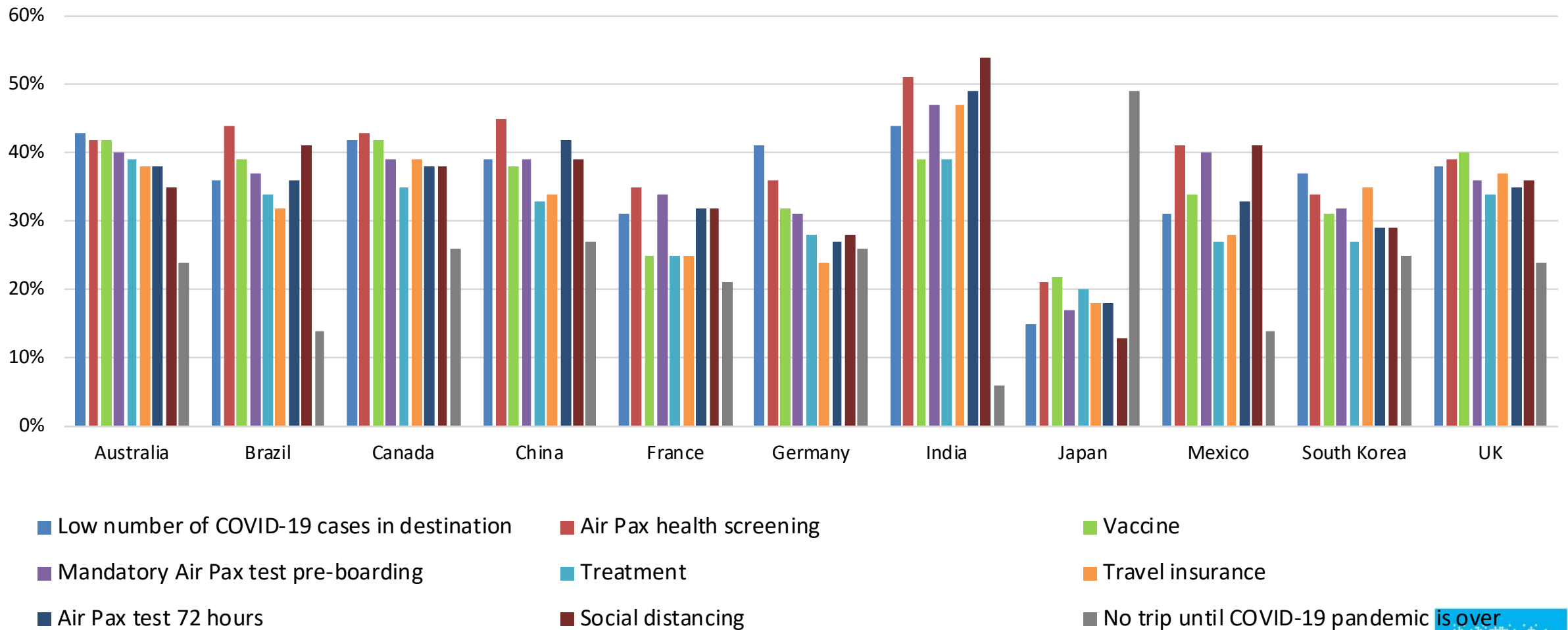




What do I require?



# Necessities for Overseas Travel\*: January 2021



\*For Canada and Mexico the question references international travel  
Base: All respondents  
Source: Engine/ORC Custom Study

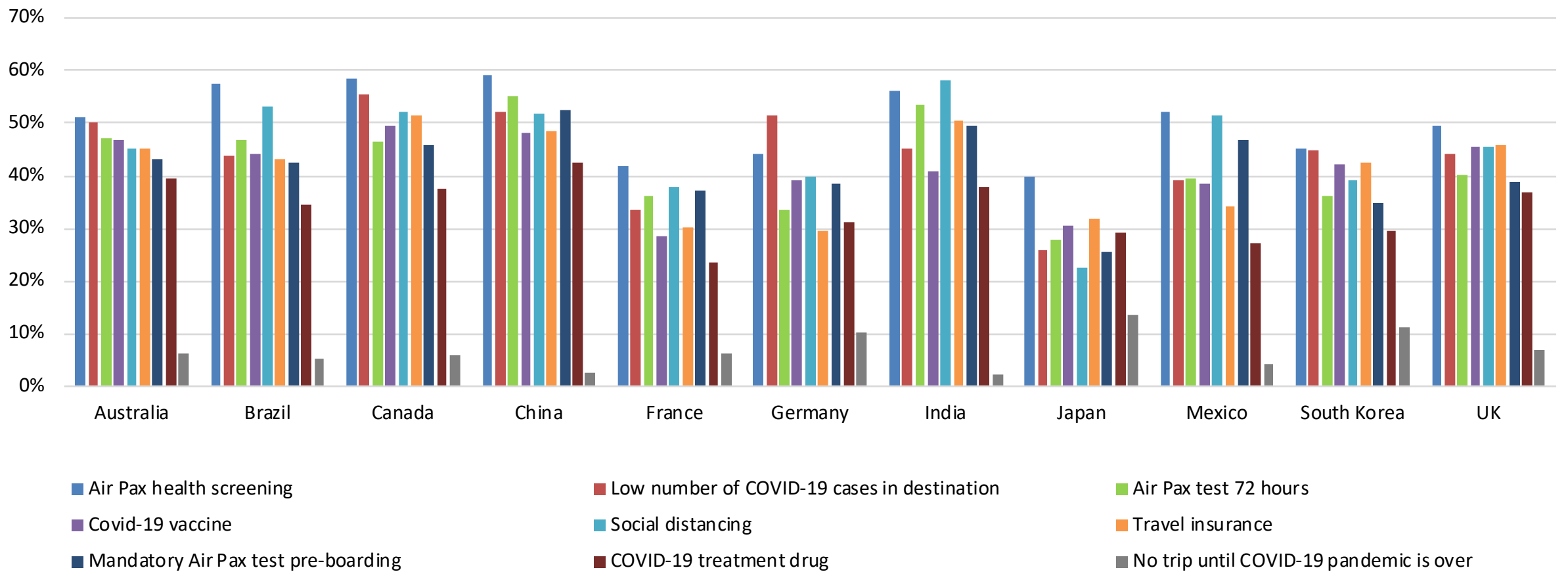




# Necessities for Overseas Travel\*:

## Filtered by Intent to Travel Internationally in Next 12 Months

(January 2021)

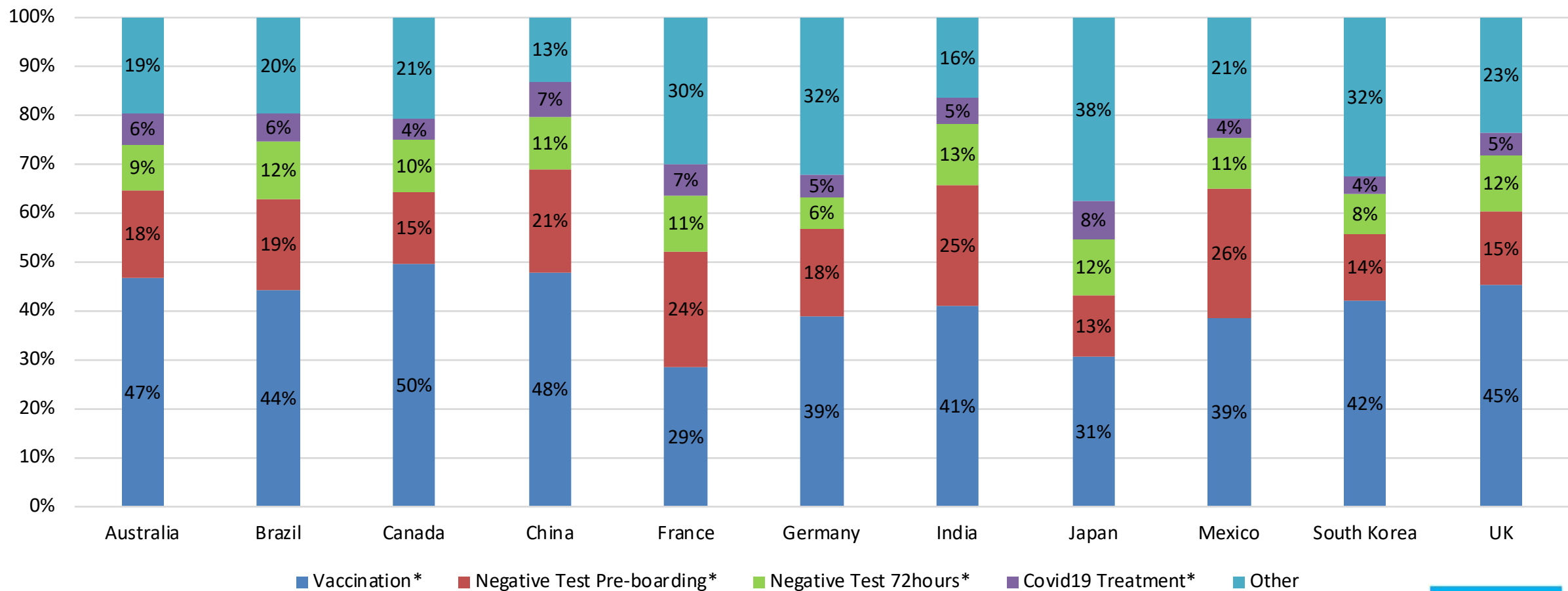


\*For Canada and Mexico the question references international travel  
Base: All respondents  
Source: Engine/ORC Custom Study



# Necessities for Overseas Travel\*

(January 2021)

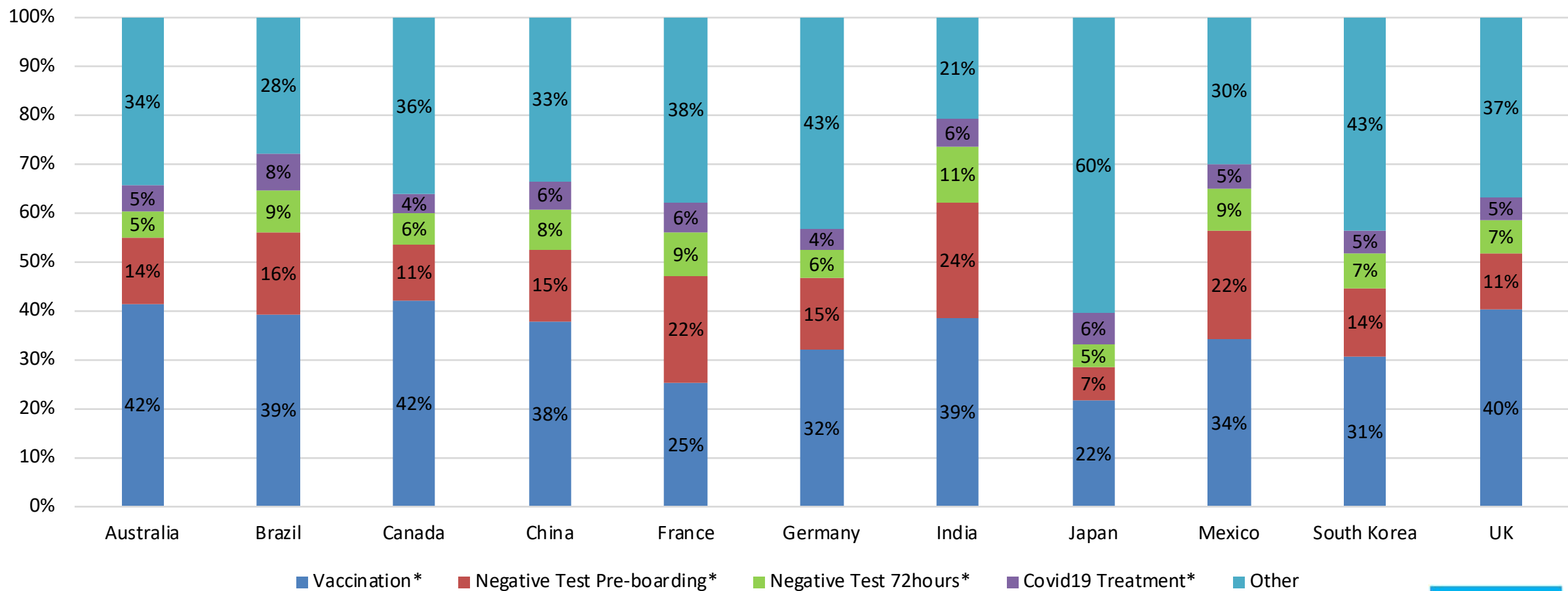


\*For Canada and Mexico the question references international travel  
Base: All respondents  
Note: Options are mutually exclusive. “Other” category is multiple choice.  
Source: Engine/ORC Custom Study





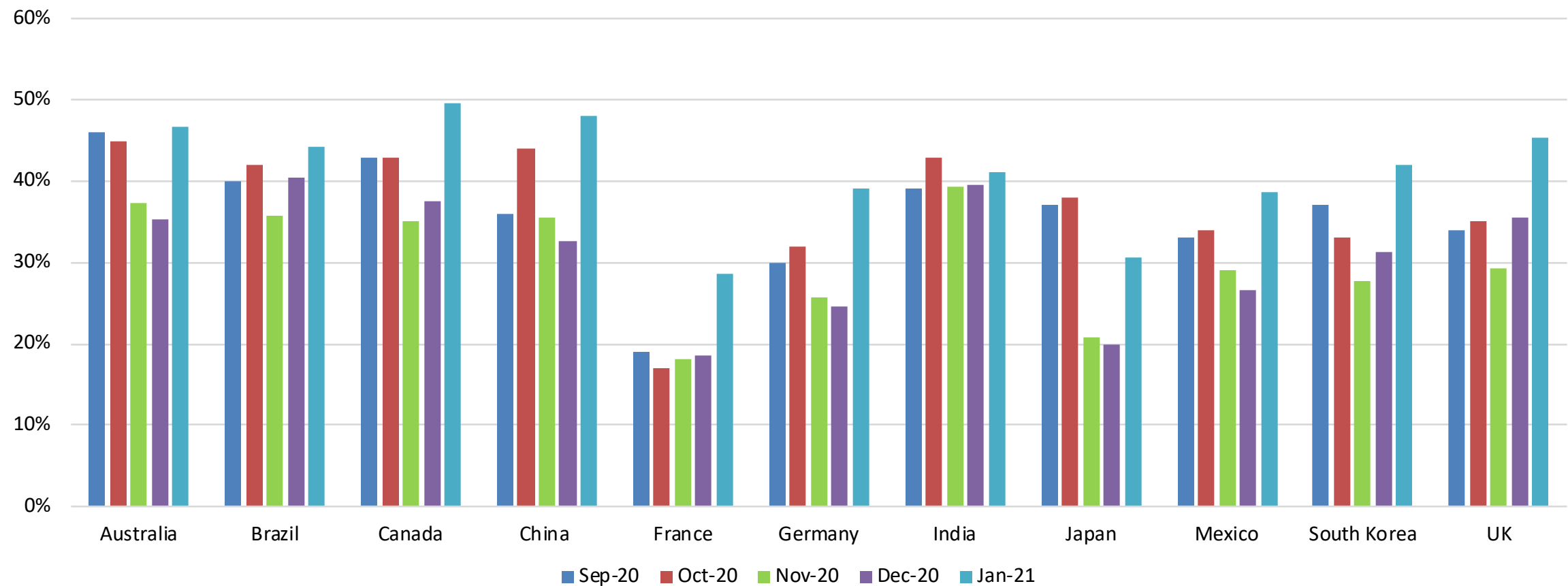
# Necessities for Overseas Travel\*: Filtered by Intent to Travel Internationally in Next 12 Months (January 2021)



\*For Canada and Mexico the question references international travel  
Base: Respondents who are likely to take an international trip in the next 12 months (Very and somewhat likely take an international holiday trip in the next 12 months)  
Note: Options are mutually exclusive. "Other" category is multiple choice.  
Source: Engine/ORC Custom Study



# Necessities for Overseas Travel\*: Covid-19 Vaccine



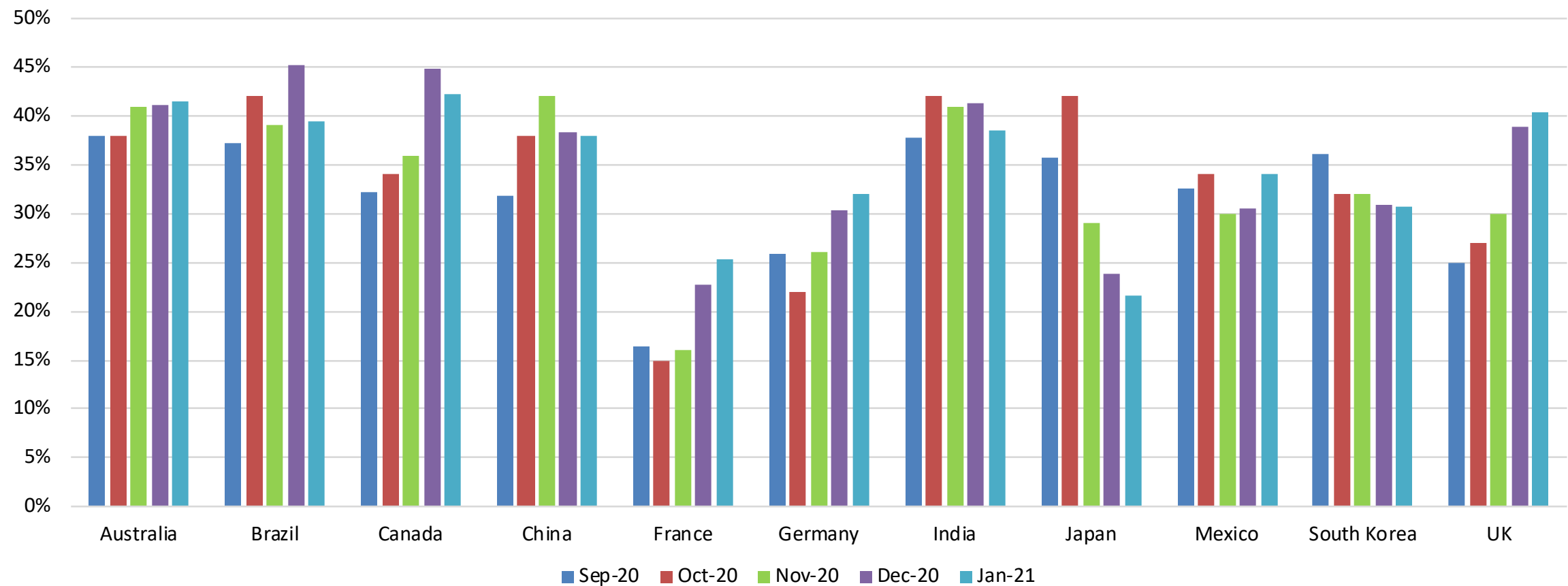
\*For Canada and Mexico the question references international travel  
Base: All respondents  
Source: Engine/ORC Custom Study





# Necessities for Overseas Travel\*: Covid-19 Vaccine

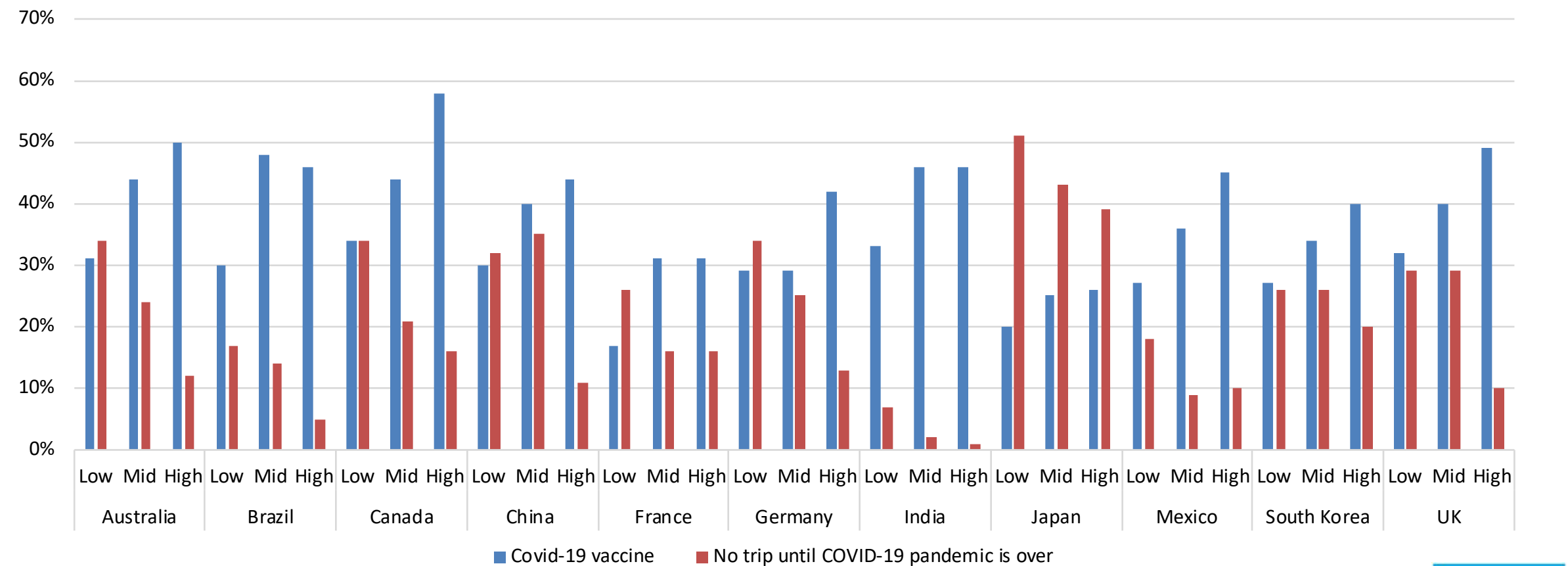
(Filtered by Intent to Travel Internationally in Next 12 Months)



\*For Canada and Mexico the question references international travel  
Base: Respondents who are likely to take an international trip in the next 12 months (Very and somewhat likely take an international holiday trip in the next 12 months)  
Source: Engine/ORC Custom Study



# Necessities for Overseas Travel: Covid-19 Vaccine & No Trip Until Pandemic is Over By Household Income – January 2021



\*For Canada and Mexico the question references international travel  
 Base: All respondents  
 Source: Engine/ORC Custom Study

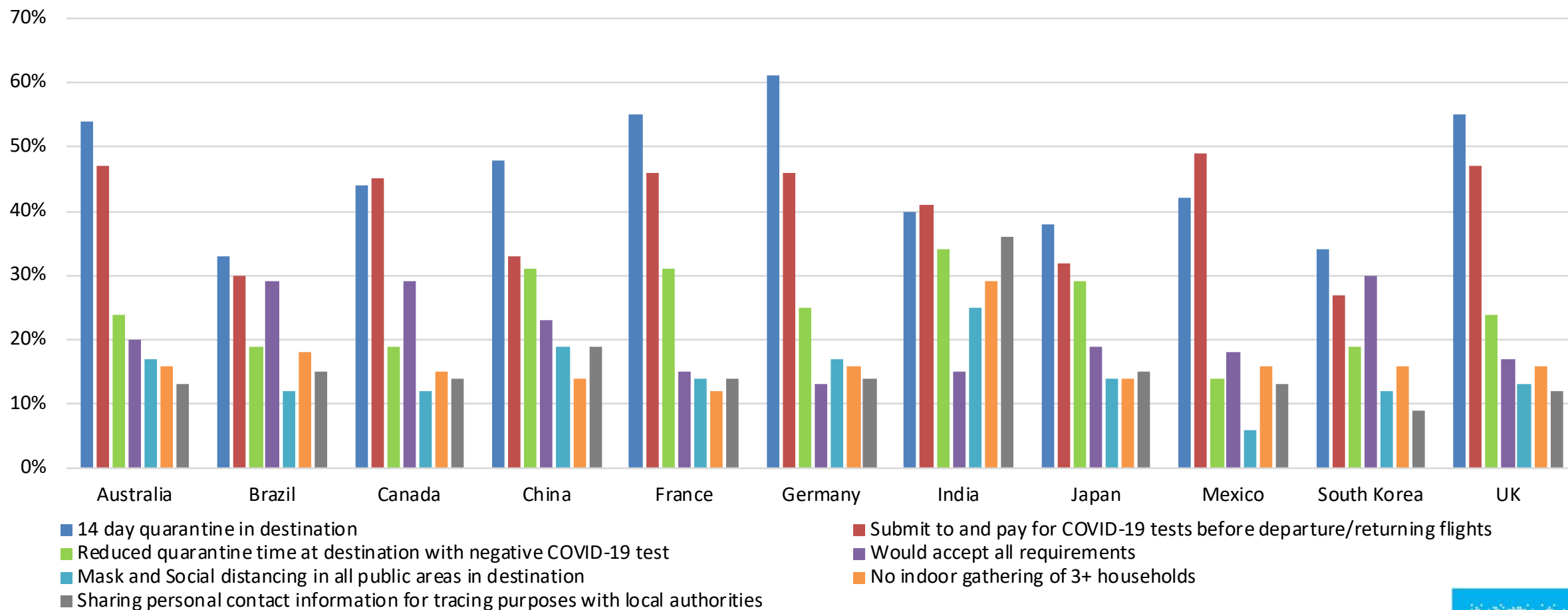




What is required  
of me?



# UNACCEPTABLE Requirements for Overseas Travel\* (January 2021)



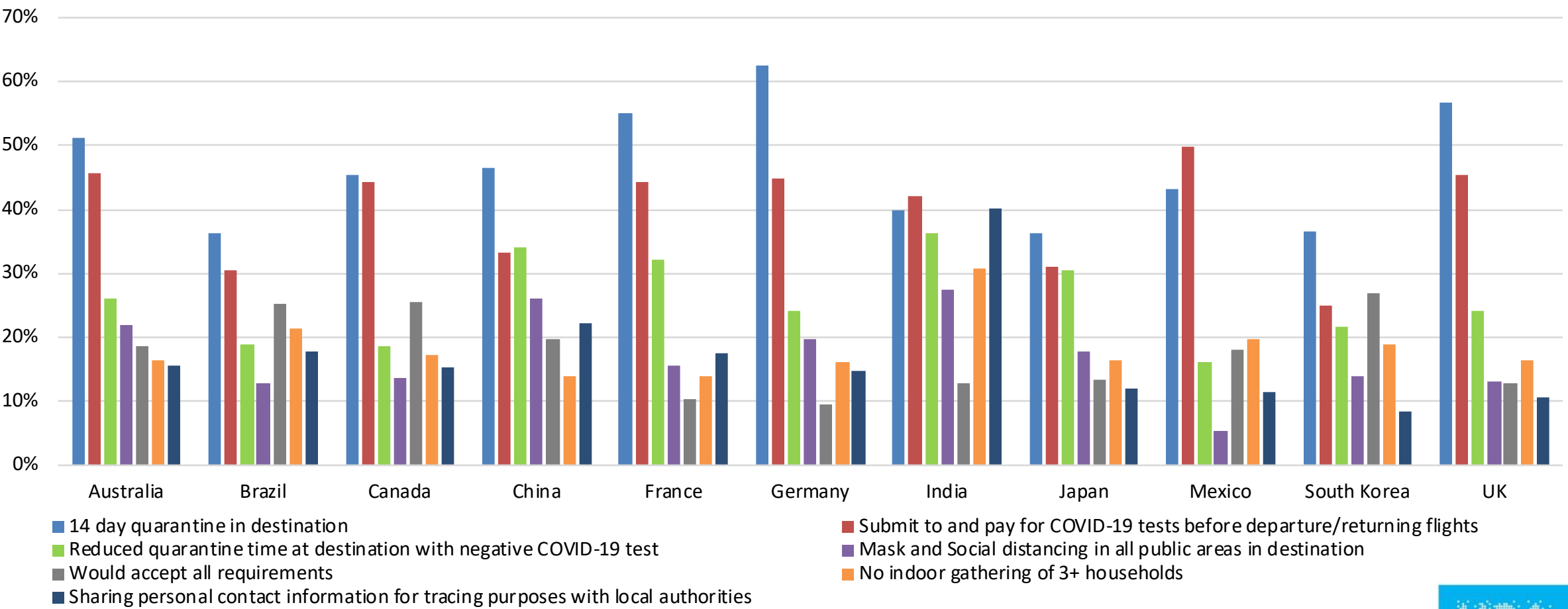
\*For Canada and Mexico the question references international travel

Base: Anything would be absolutely necessary in order to take an international leisure trip

Source: Engine/ORC Custom Study



# UNACCEPTABLE Requirements for Overseas Travel\*: Filtered by Intent to Travel Internationally in Next 12 Months (January 2021)



\*For Canada and Mexico the question references international travel  
Base: Respondents who are likely to take an international trip in the next 12 months (Very and somewhat likely take an international holiday trip in the next 12 months) and anything would be absolutely necessary in order to take an international leisure trip  
Source: Engine/ORC Custom Study

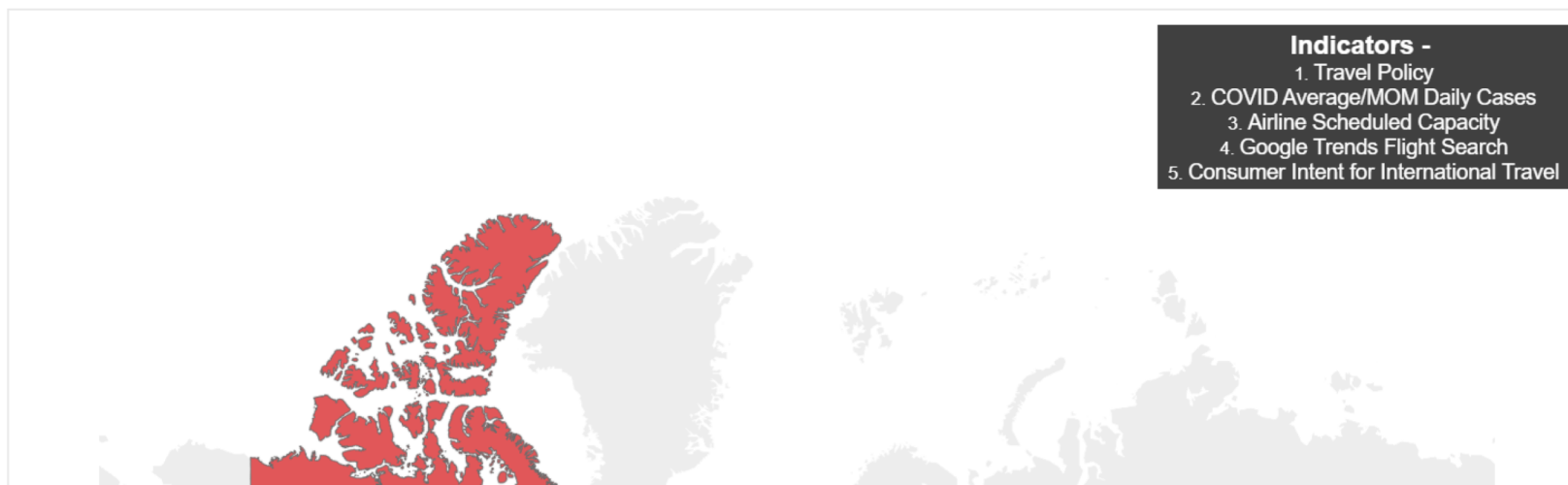


# COVID-19 INDICATOR DASHBOARD

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Brand USA has compiled a set of indicators to provide a high level dashboard of current COVID-19 related conditions. This dashboard summarizes how individual markets are performing in relation to recovery targets, which have been designed to help determine when recovery is sufficient for effective marketing activity.

**Click a Country to go to a Country Overview Page. Click "Domestic" to go to a map of the US.**

















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