Great West Way Connections – 11 August 2026

Middle East Crisis: continued impact on Europe

1. Tour Operators, Wholesalers, OTAs and DMCs
2. Suppliers and Destinations

Climate Adaptation

1. Survey and interim findings

Q&A

ETOA

CURRENT IMPACT
MIDDLE EAST CRISIS

4th WAVE RESULTS
4 AUGUST 2026

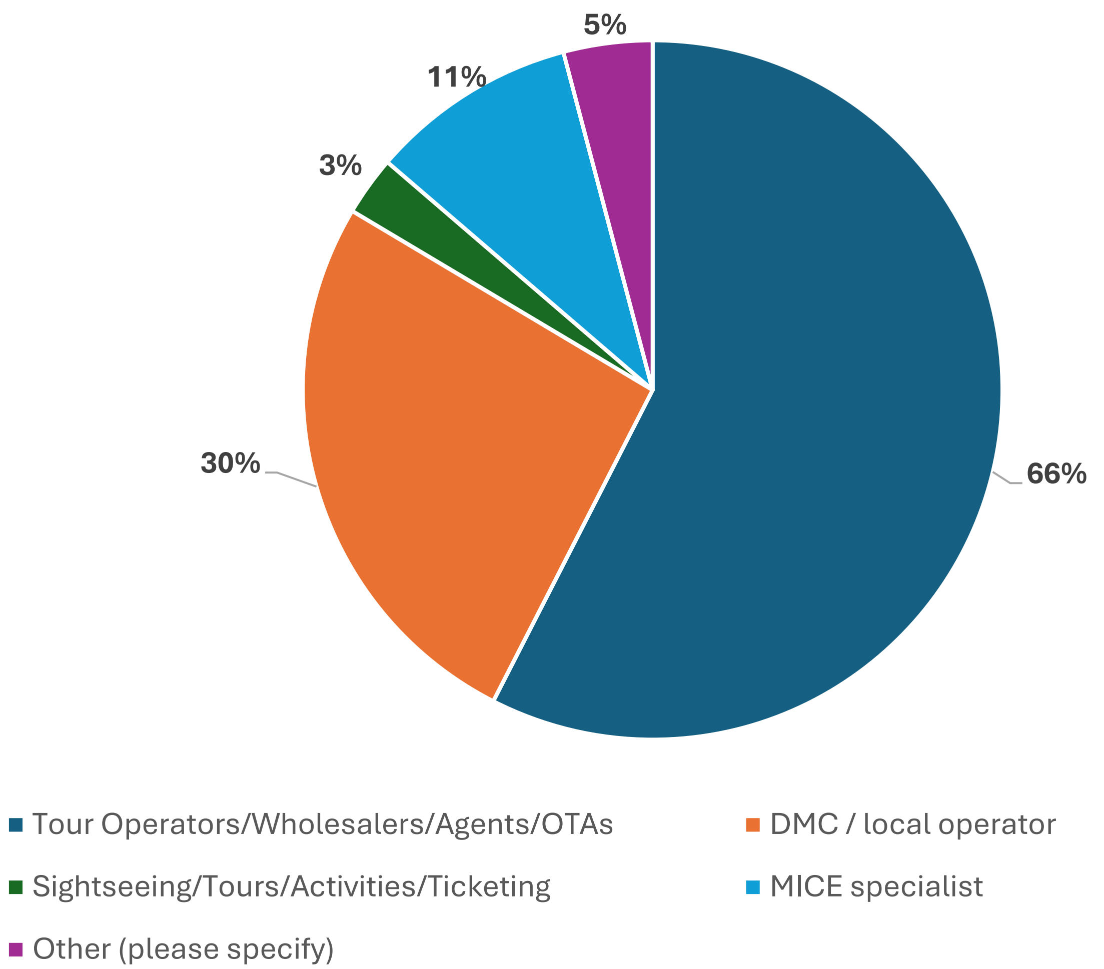
TOUR OPERATORS, WHOLESALERS, OTAS & DMCS

DISCLAIMER

This analysis is based on a qualitative survey sent to ETOA's buyer and DMC network. Multiple responses per company are possible so results reflect indicative trends only and are not statistically representative and should be used for industry insight and discussion purposes only.

Summaries have been generated using AI-assisted aggregation and synthesis of the collected responses.

RESPONDENT PROFILE | BUSINESS TYPE



Based on a total of 64 survey responses, the respondent profile remains dominated by tour operators, wholesalers, agents and OTAs. DMC/local operators continue to account for over a third of respondents, maintaining the strong representation seen in the previous surveys.

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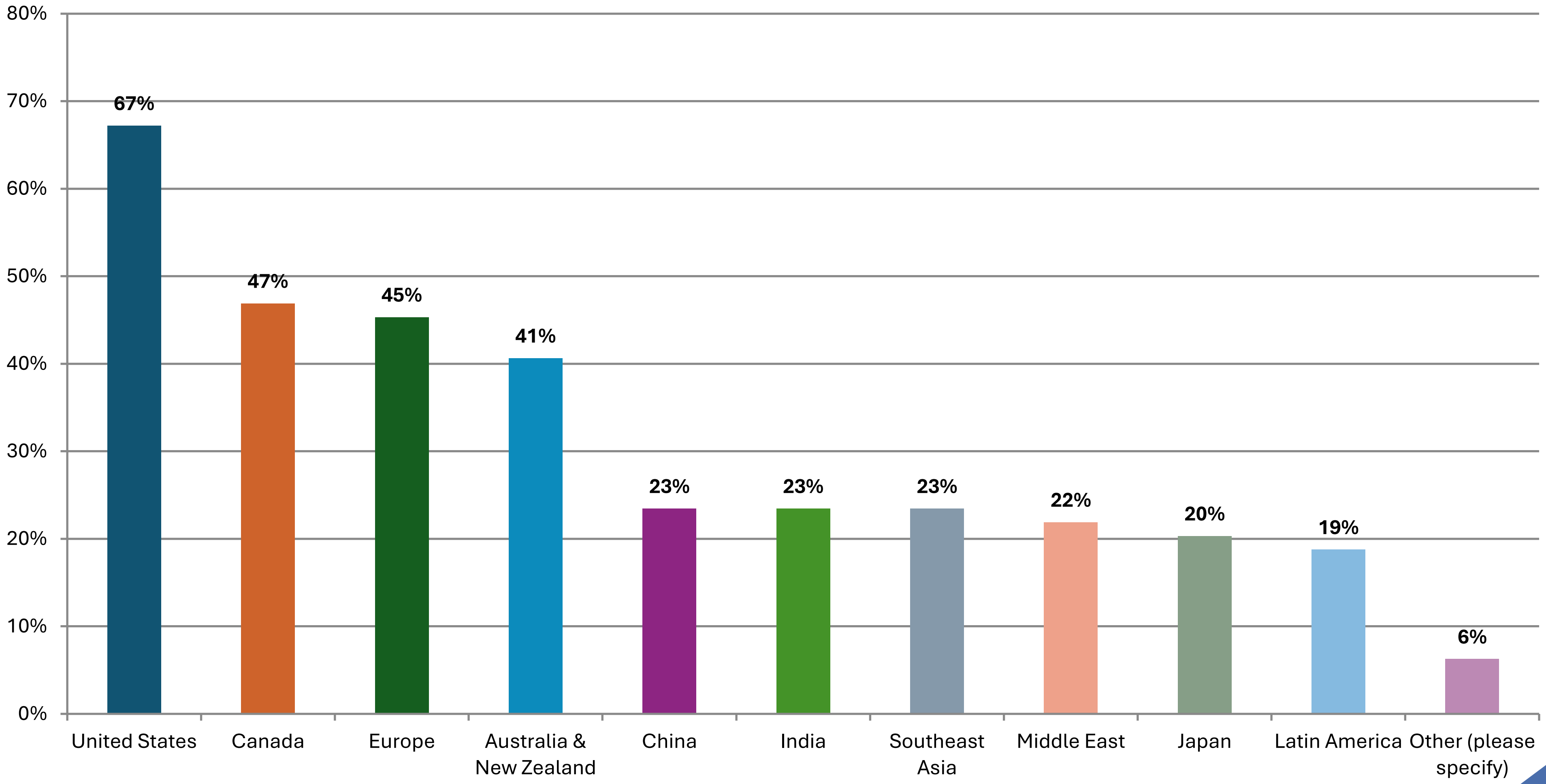
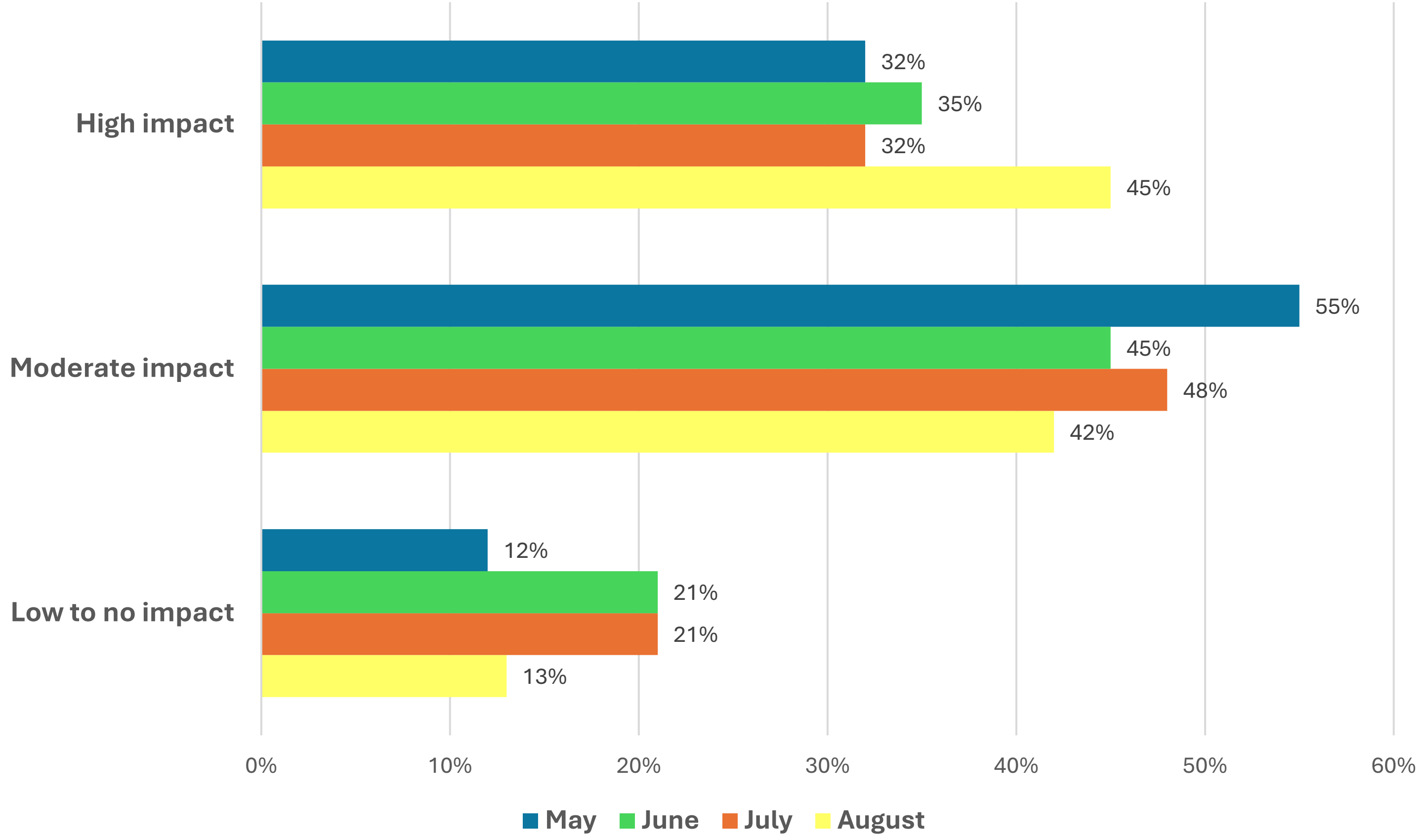
RESPONDENT PROFILE | SOURCE MARKET



IMPACT OF THE MIDDLE EAST CRISIS ON BUSINESS



August results indicate a higher perceived business impact. The share reporting **high impact** increased to 45%, while **moderate impact** remained broadly in line with previous months.

** High Impact: Strong and sustained impact requiring major operational changes such rebooking/rerouting, cost mitigation, and/or strategic shifts e.g. to refocus on other markets and/or products.*

*** Low to no Impact: No significant effect as yet on demand, operations, costs, or revenue*

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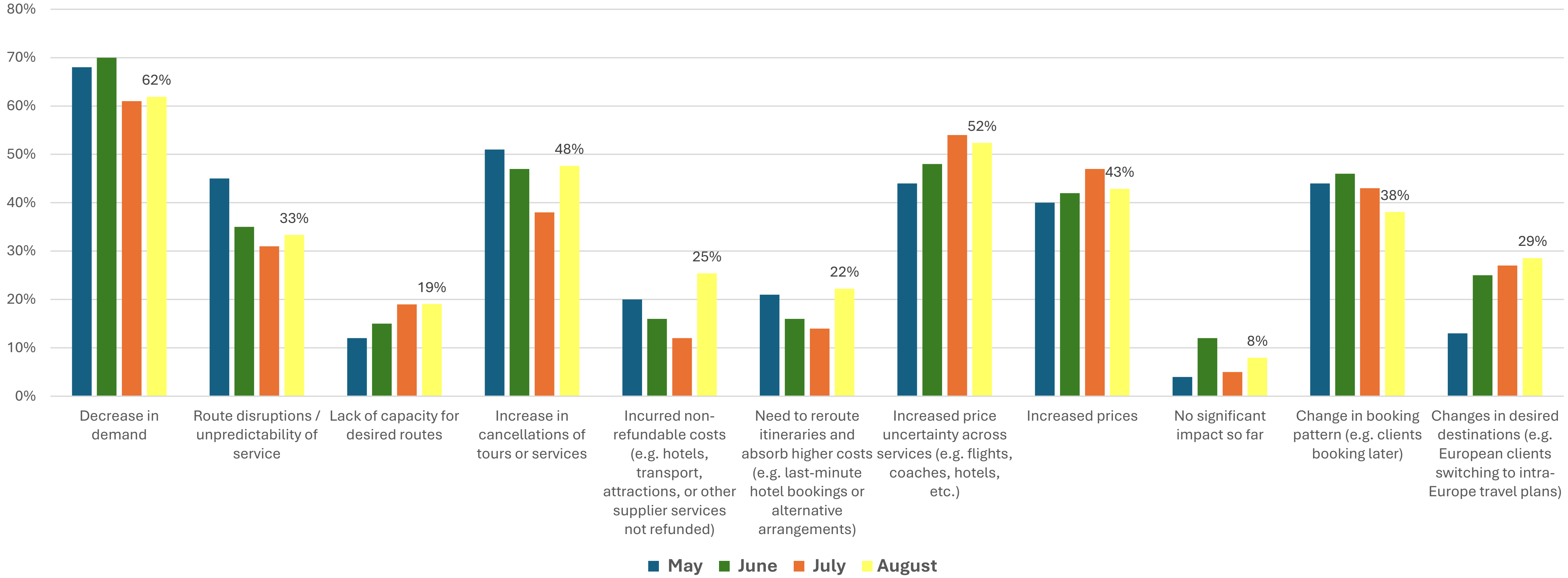
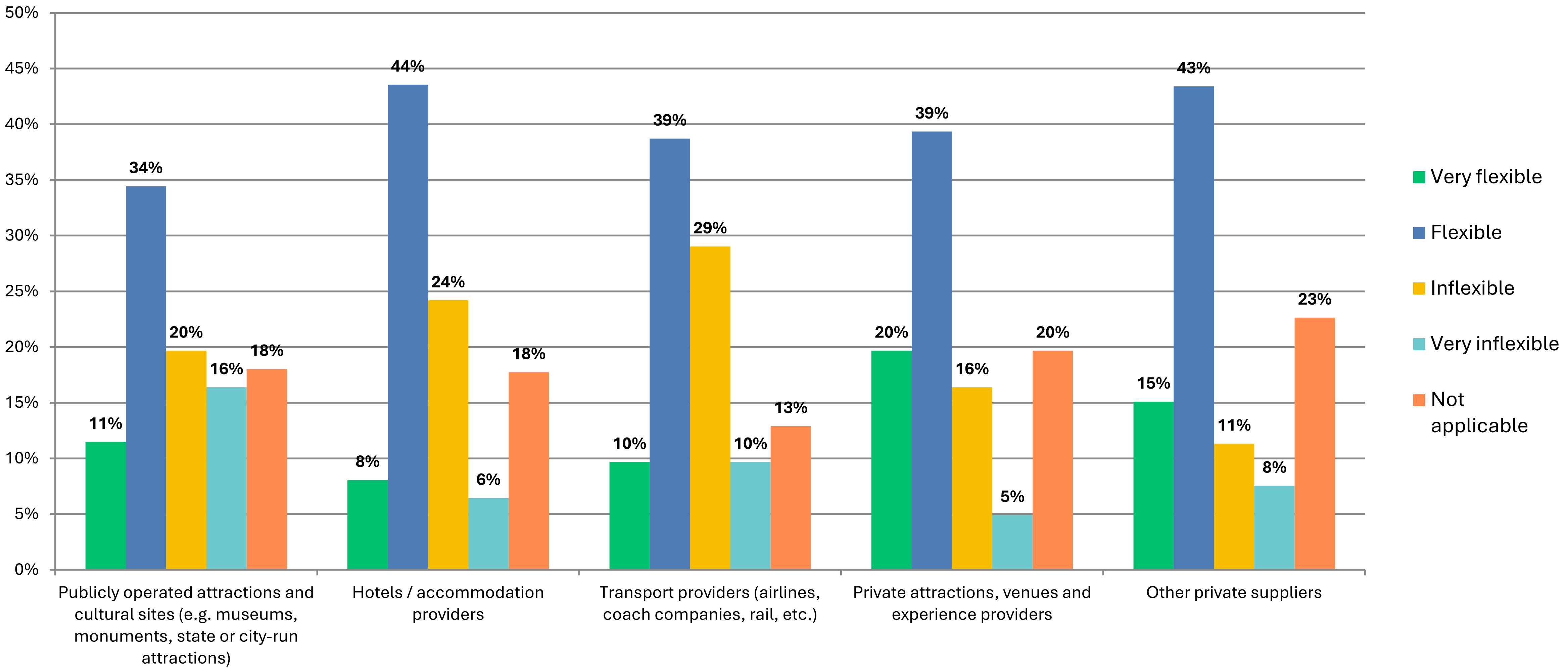
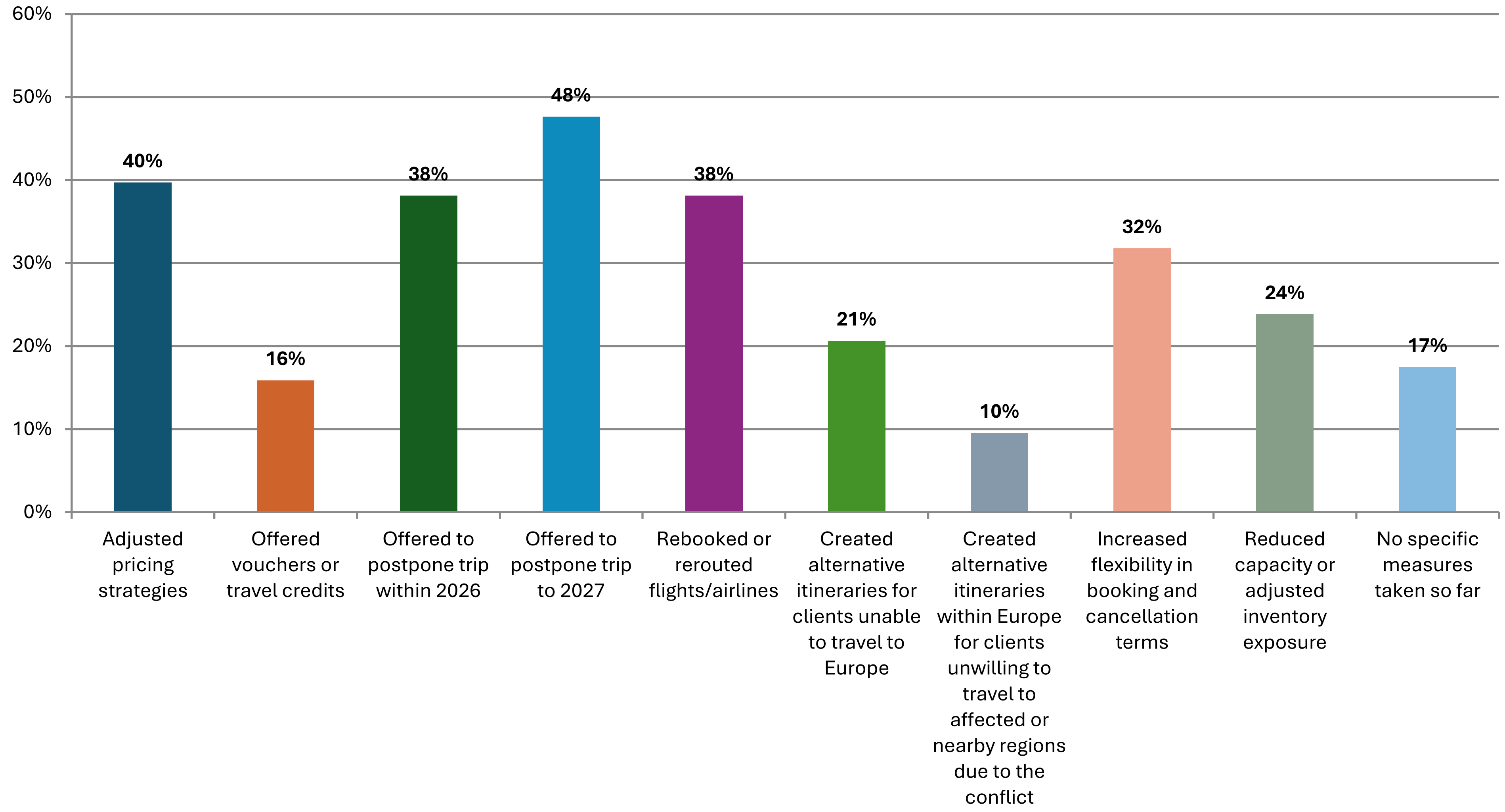
WHAT IMPACT DO YOU SEE?



PERCEIVED SUPPLIER FLEXIBILITY

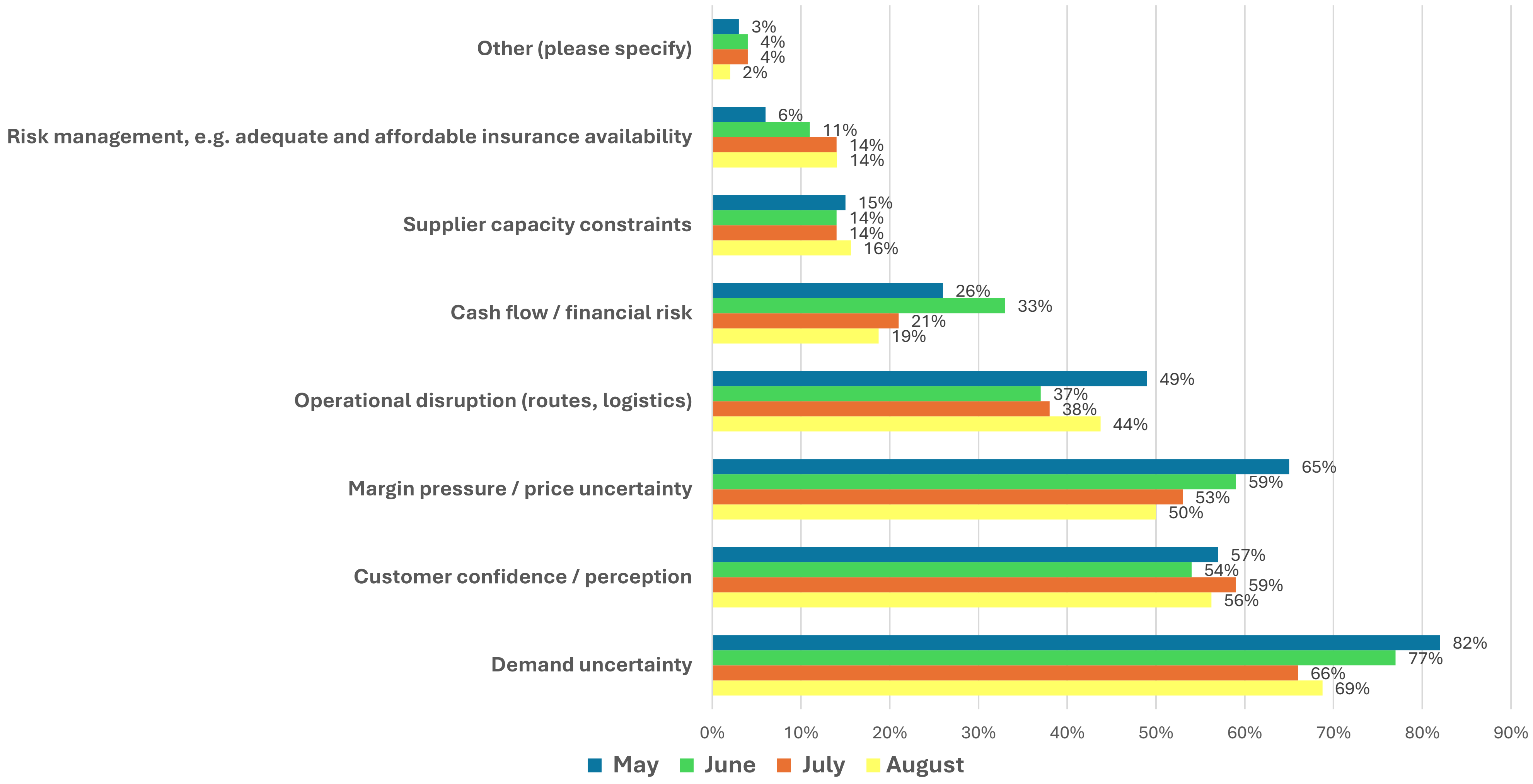


MEASURES IMPLEMENTED BY OPERATORS

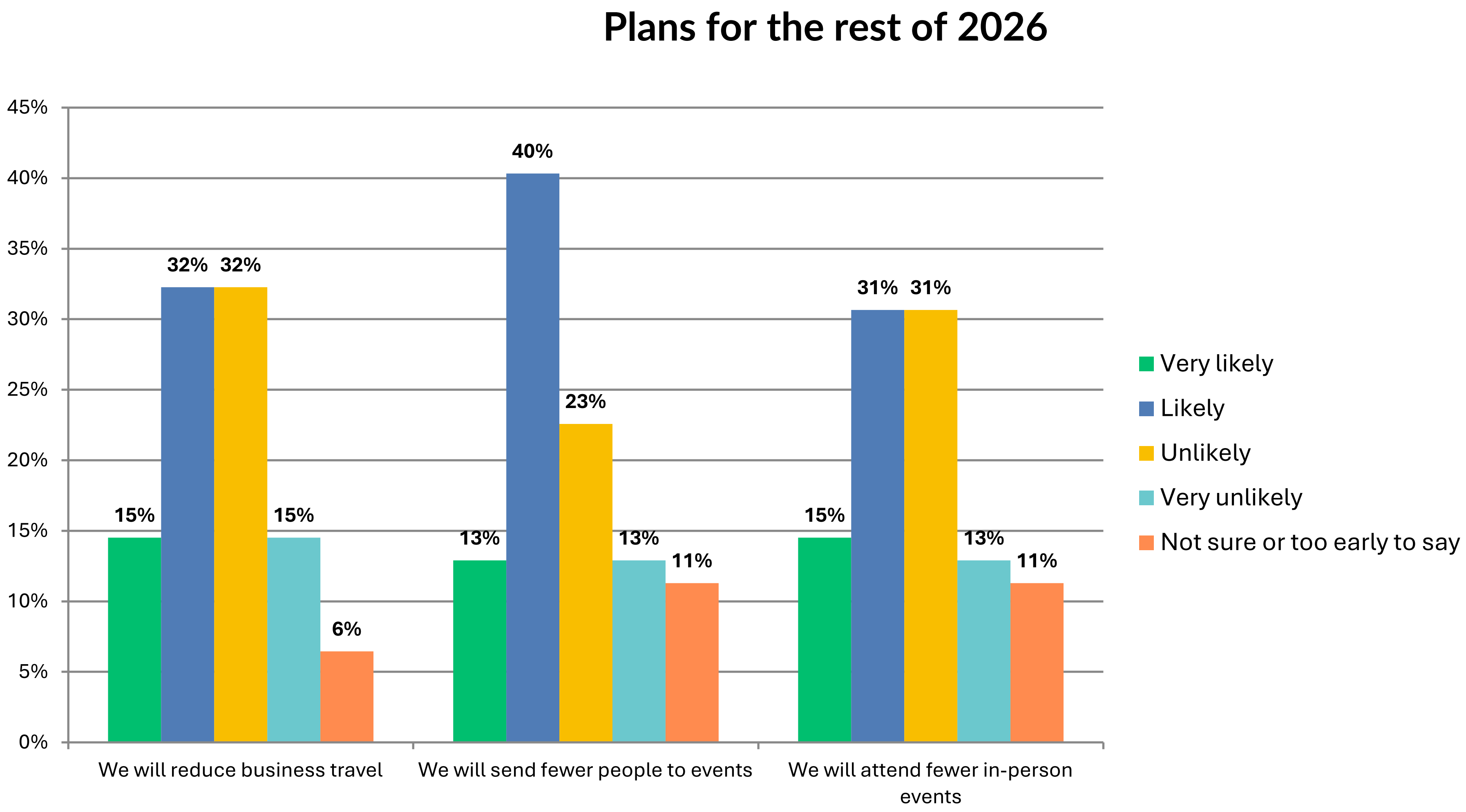


Compared with July, businesses are placing greater emphasis on adjusting pricing strategies, which increased from 32% to 40%. Postponing trips to 2027 remains the most common response, while rebooking/rerouting flights also increased (38% vs 25%).

MAIN CONCERNS LOOKING AHEAD



IMPACT ON IN-HOUSE TRAVEL POLICY



Overall, responses indicate little change between July and August. Around half of respondents continue to anticipate some reduction in business travel and event participation during the remainder of 2026. Expectations of reducing business travel increased slightly (from 42% to 47%), while expectations of attending fewer in-person events eased marginally (from 51% to 46%)

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CURRENT IMPACT MIDDLE EAST CRISIS

3rd WAVE RESULTS 4 AUGUST 2026

SUPPLIERS AND DESTINATIONS

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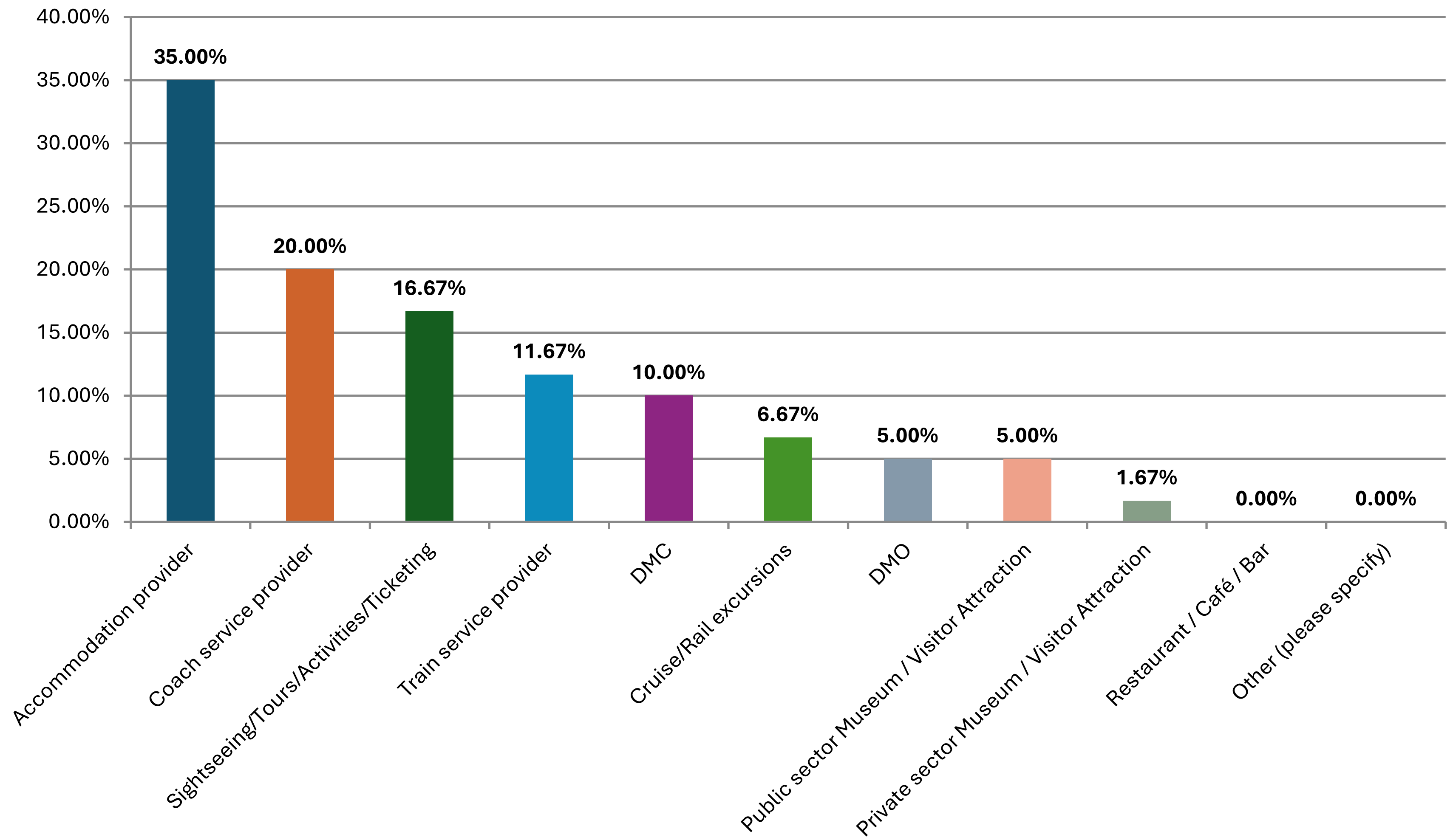

The survey gathered responses from 60 stakeholders, with the majority representing accommodation, activities and coach service providers

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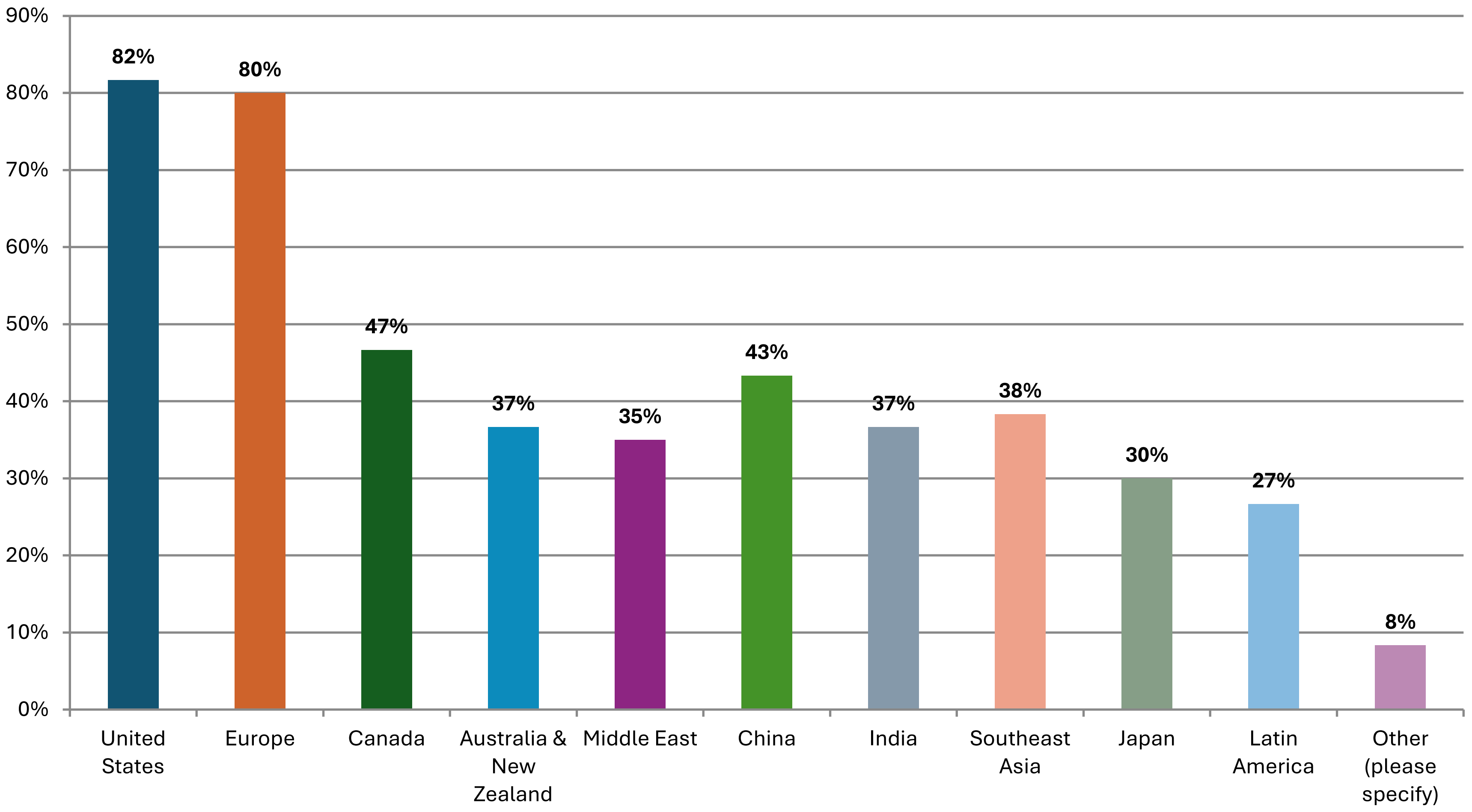
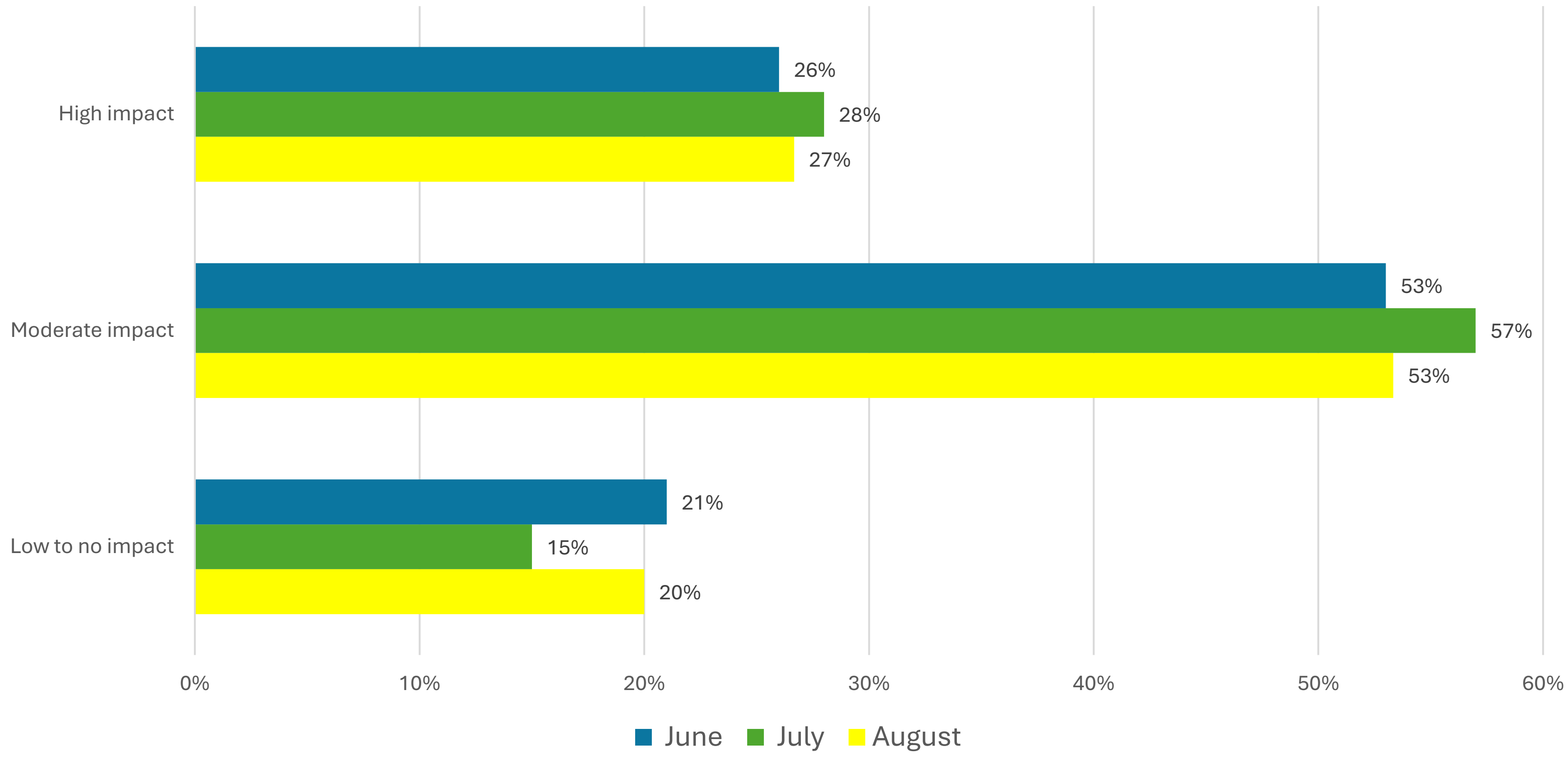
RESPONDENT PROFILE | SOURCE MARKET



Respondents work with a diverse range of international source markets, with the strongest focus on the United States and Europe, followed by Canada, China, Southeast Asia, Australia/New Zealand and India.

IMPACT OF THE MIDDLE EAST CRISIS ON BUSINESS



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IMPACT ON BUSINESS

Reported Insights from Stakeholders

- *"25% drop in visitors."*
- *"25% decrease in US business."*
- *"Approximately 15% fewer pax on our tours."*
- *"We have not seen the usual demand from Far East markets."*

The crisis has primarily affected long-haul visitor demand, booking confidence, air connectivity and operating costs.

Organisations with greater dependence on long-haul international visitors reported the most significant impacts, while others experienced more limited effects.

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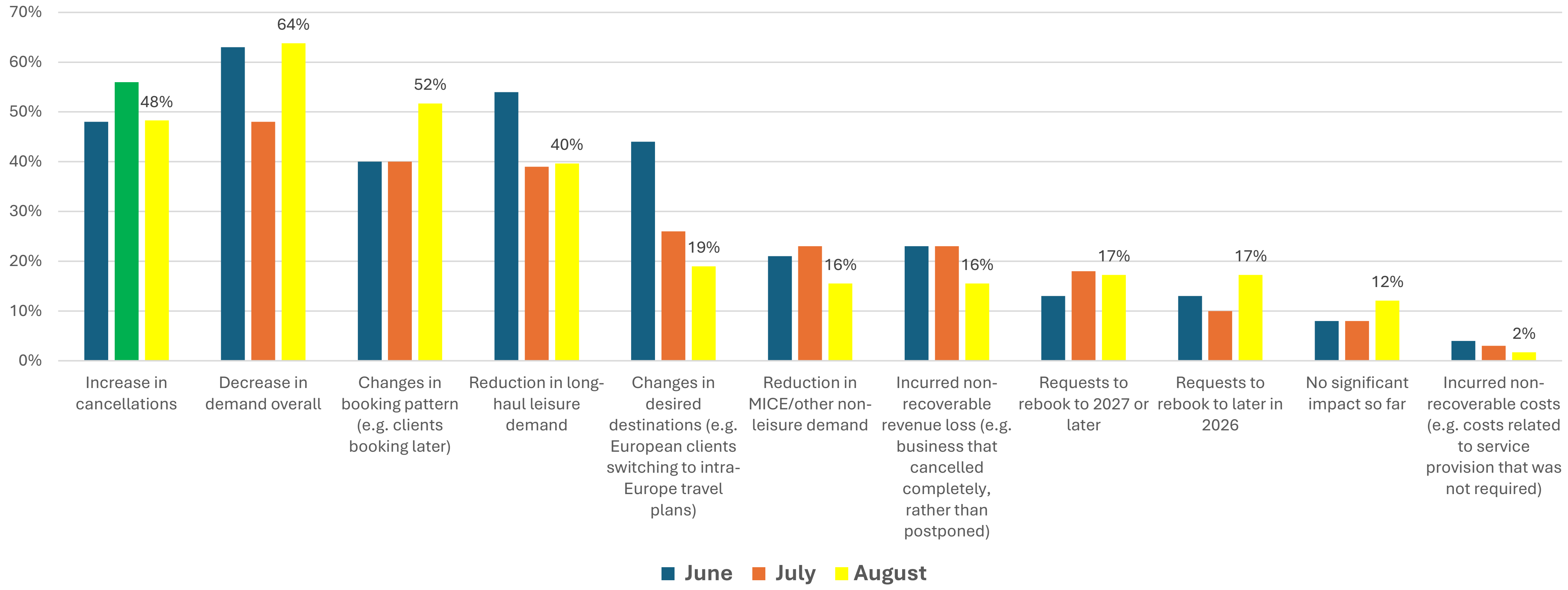
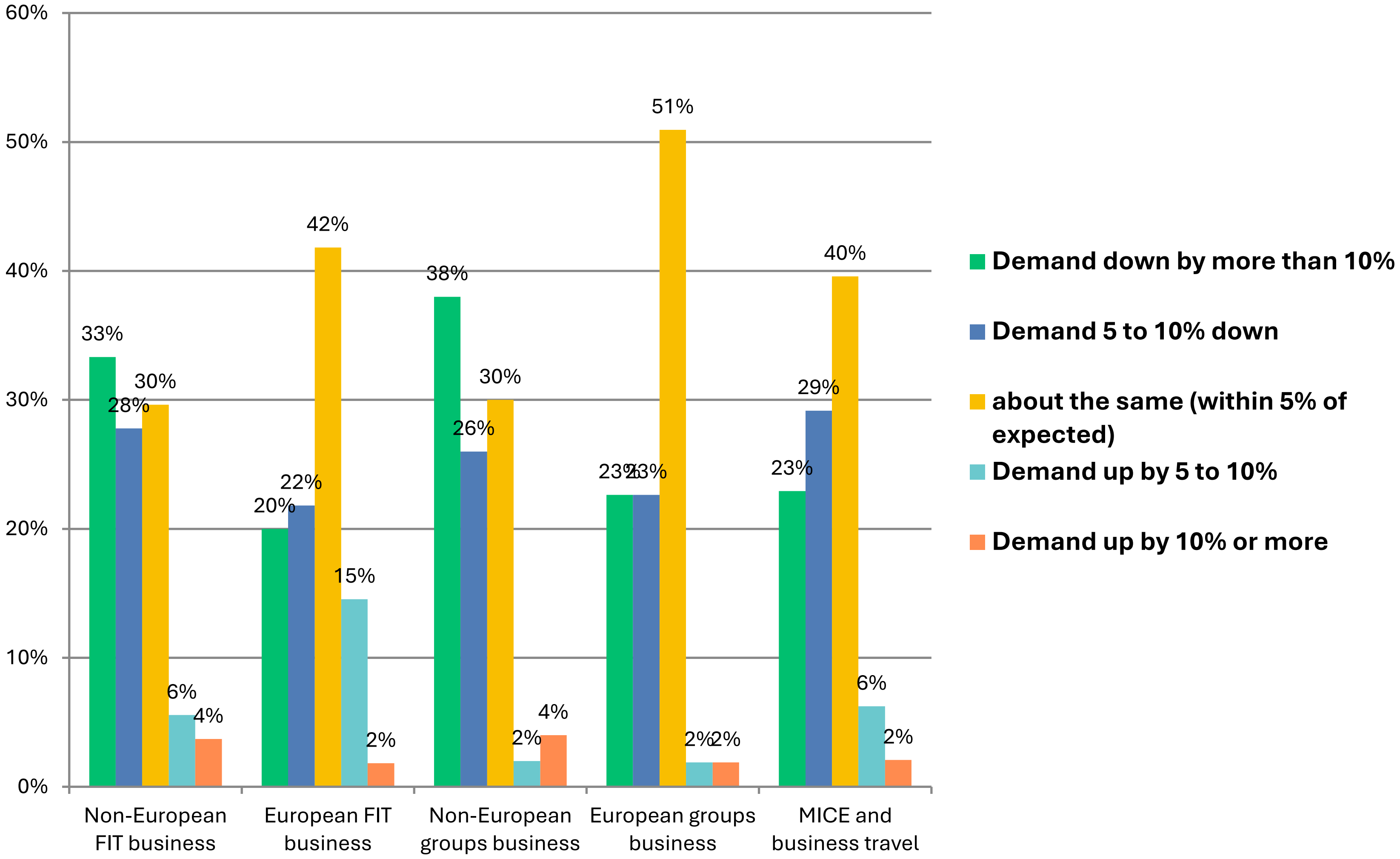
WHAT IMPACT DO YOU SEE?

Overall demand remained the biggest challenge throughout the summer, with cancellations staying consistently high, while later booking behaviour increased and other market impacts showed signs of stabilising.



IMPACT ON CURRENT DEMAND VERSUS EXPECTED PRE-CRISIS



Compared with July, non-European FIT shows a modest improvement, with fewer businesses reporting demand down by more than 10% (37% to 33%) and more reporting demand in line with expectations (22% to 30%).

However, European FIT, European groups and MICE all show a slight deterioration, while non-European groups remain largely unchanged and continue to be the weakest-performing segment.

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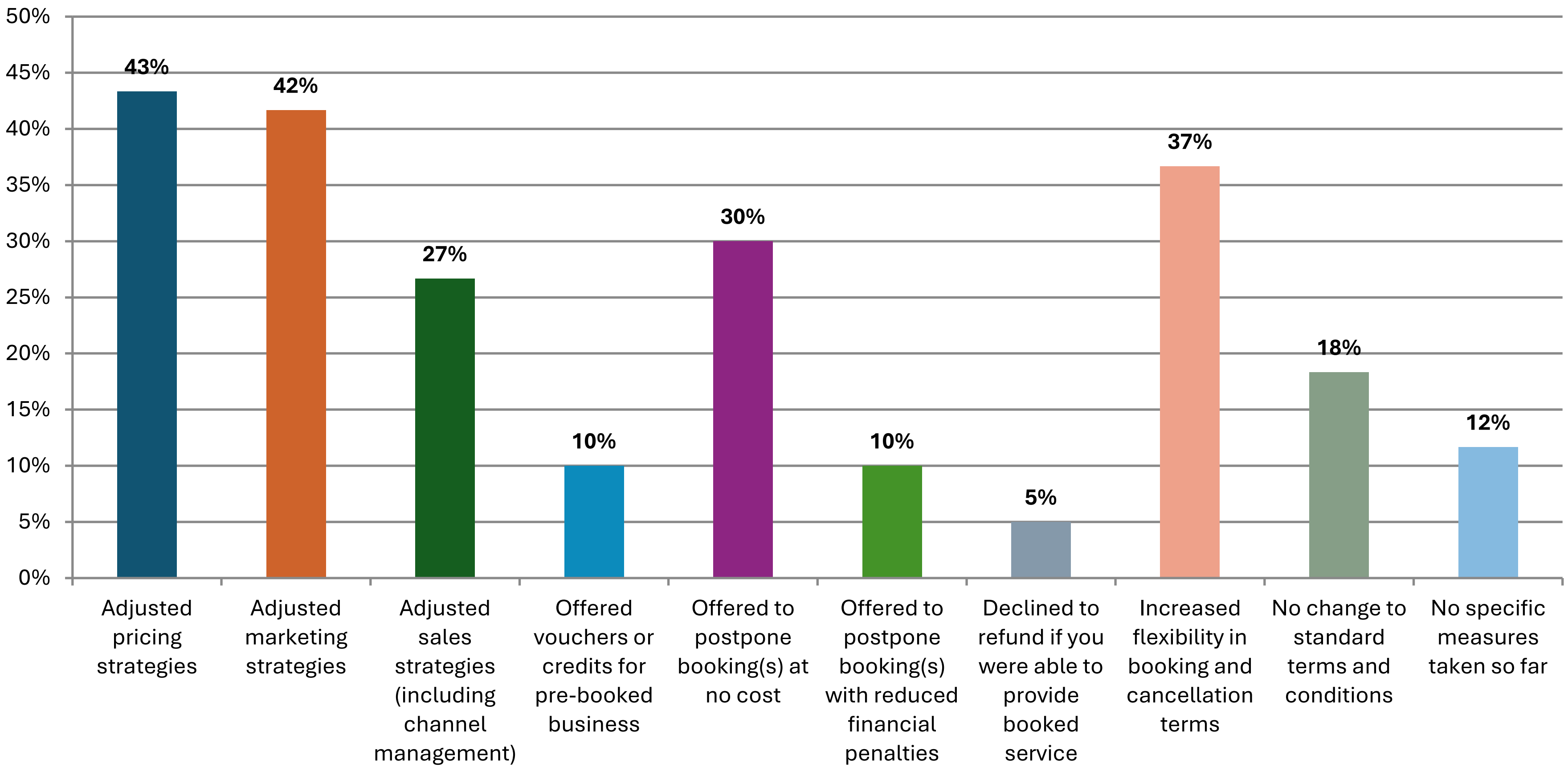
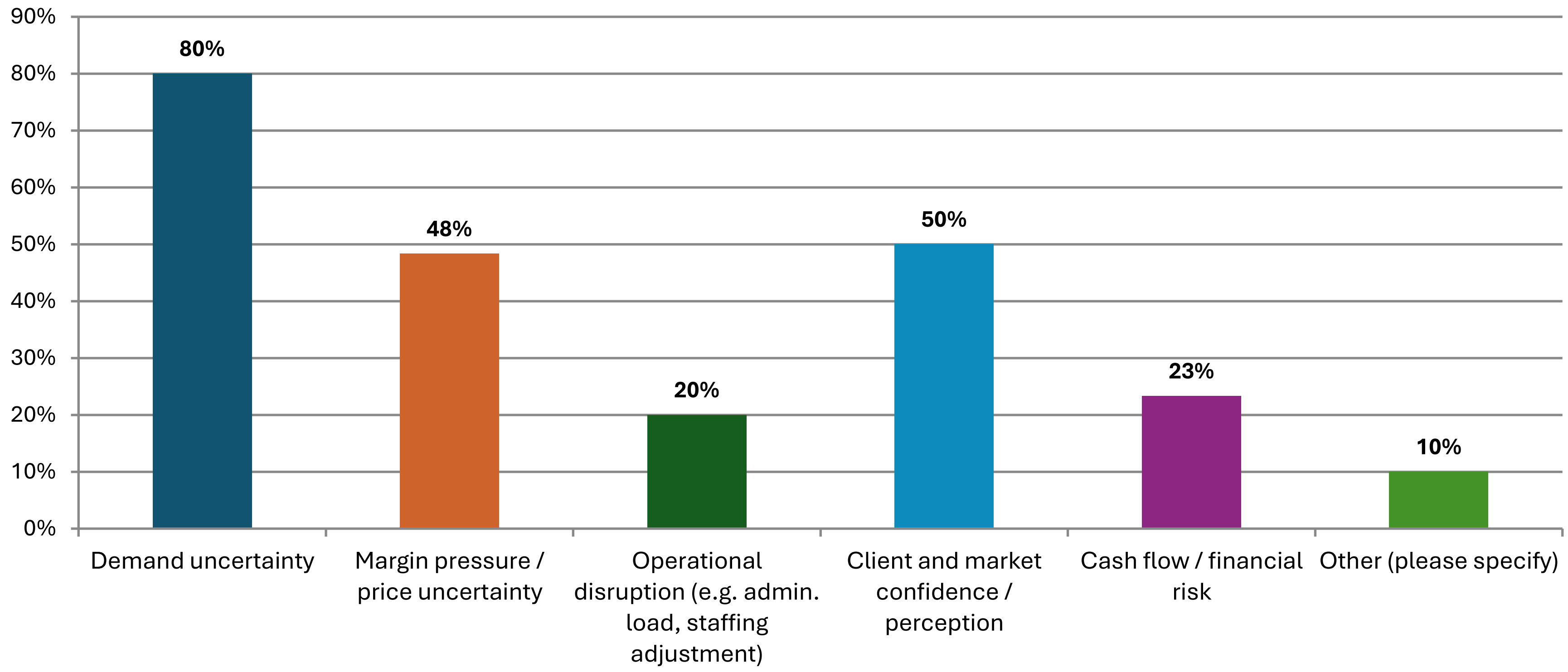
MEASURES IMPLEMENTED



Compared with July, businesses placed greater emphasis on pricing flexibility and customer support, with increases in adjusted pricing strategies (40% to 43%), flexible booking and cancellation terms (33% to 37%), and free booking postponements (25% to 30%). At the same time, fewer businesses reported taking no specific measures (22% to 12%).

MAIN CONCERNS LOOKING AHEAD

Demand uncertainty remains the dominant concern, with little change from July (78% to 80%), alongside stable concerns around margin pressure (47% to 48%). However, concern about client and market confidence increased substantially (27% to 50%), while operational disruption became much less of an issue (41% to 20%).



IMPACT ON IN-HOUSE TRAVEL POLICY

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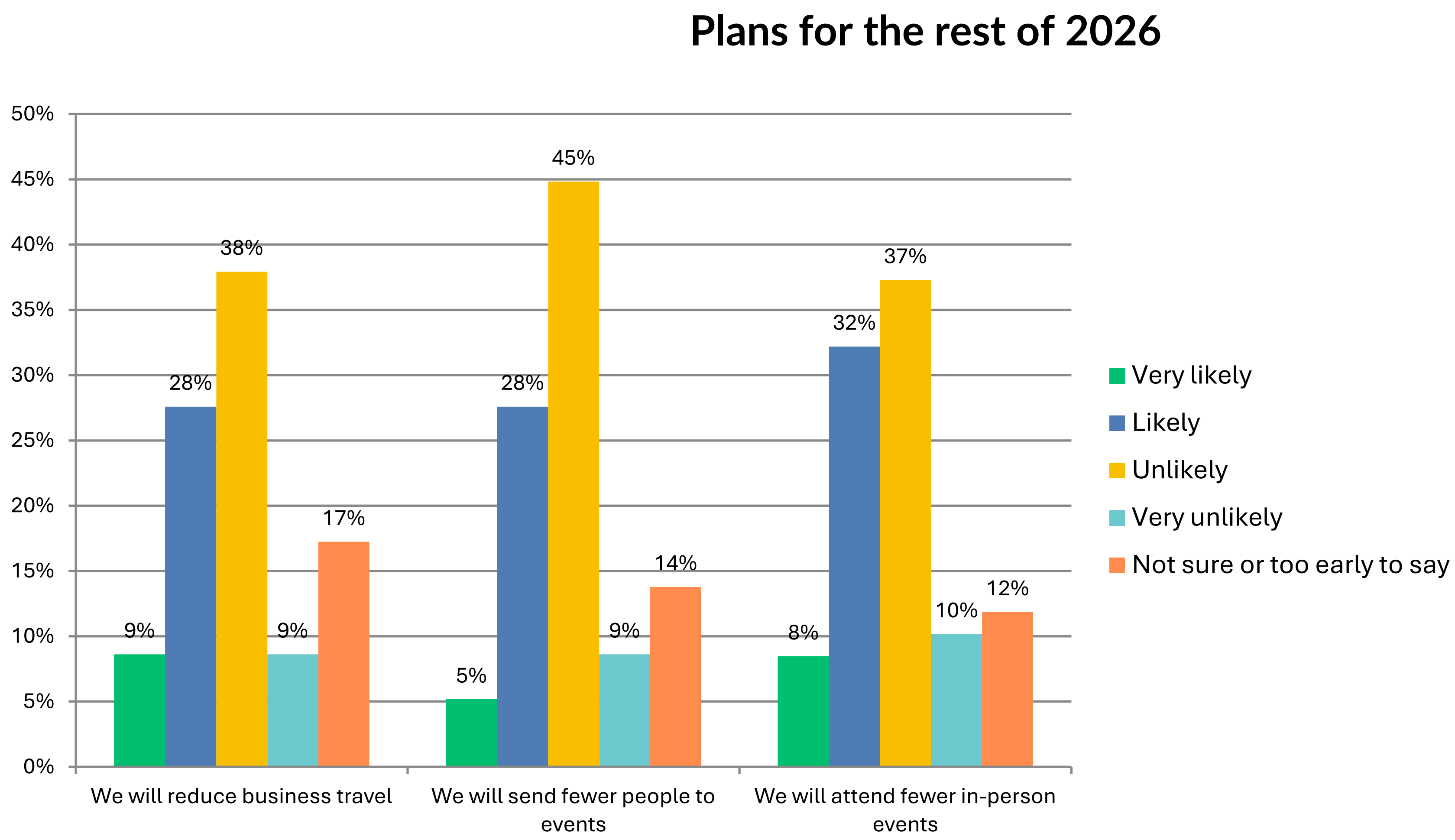

August results show a modest shift towards expecting reductions in business travel and event participation, with the combined "very likely" and "likely" responses increasing from 23% to 37% for business travel, 26% to 33% for sending fewer people to events, and 21% to 40% for attending fewer in-person events. Despite this, "unlikely" remains the most common response across all three measures.

STRATEGIC DECISIONS EXPECTED IF CURRENT CONDITIONS PERSIST

- **Shift towards European, domestic and alternative international markets**
  Greater focus on European and domestic travellers, while diversifying into markets such as the Americas, Brazil, Nordic countries and the GCC to reduce reliance on affected source markets.
- **Product diversification**
  Diversifying product offerings and promoting new or less traditional tourism products.
- **Cost reduction and operational efficiency**
  Reducing operational expenditure, restructuring organisations, lowering staffing costs where necessary.
- **Commercial and pricing adjustments**
  Reviewing pricing strategies, introducing fuel surcharges, focusing on revenue optimisation, increasing direct consumer marketing, and maximising tour occupancy.
- **Maintaining flexibility and a cautious approach**
  Many organisations intend to remain flexible, monitor market developments closely, and adapt tactically rather than making major strategic changes until there is greater certainty.
- **Reduced investment in selected activities**
  Some businesses expect to scale back trade show participation or reduce marketing activity in lower-priority markets.

KEY TAKEAWAY

Suppliers and Destinations are primarily responding by diversifying source markets, strengthening European and domestic demand, and implementing cost-control measures, while maintaining flexibility until market conditions become clearer.

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Middle East crisis page

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Climate Adaptation page

Survey Open

Share your feedback

https://www.etoa.org/insight-and-policy/climate-adaptation/

SAVE THE DATES

Bristol Social

Open to all, an opportunity to meet industry colleagues in a relaxed atmosphere in Bristol.

Wednesday 30th September
17:30pm - 19:00pm

Moxy Bristol, 55 Newfoundland Street,
Bristol, United Kingdom, BS2 9AP

Register here

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BIM
Britain & Ireland Marketplace

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5,500+ Meetings

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