

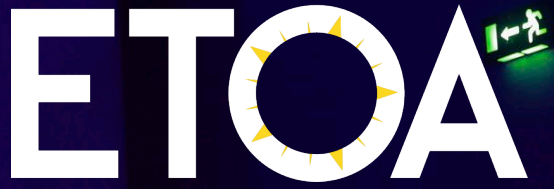


**CURRENT IMPACT
MIDDLE EAST CRISIS**

**4th WAVE RESULTS
4 AUGUST 2026**

**TOUR OPERATORS,
WHOLESALERS, OTAS & DMCS**



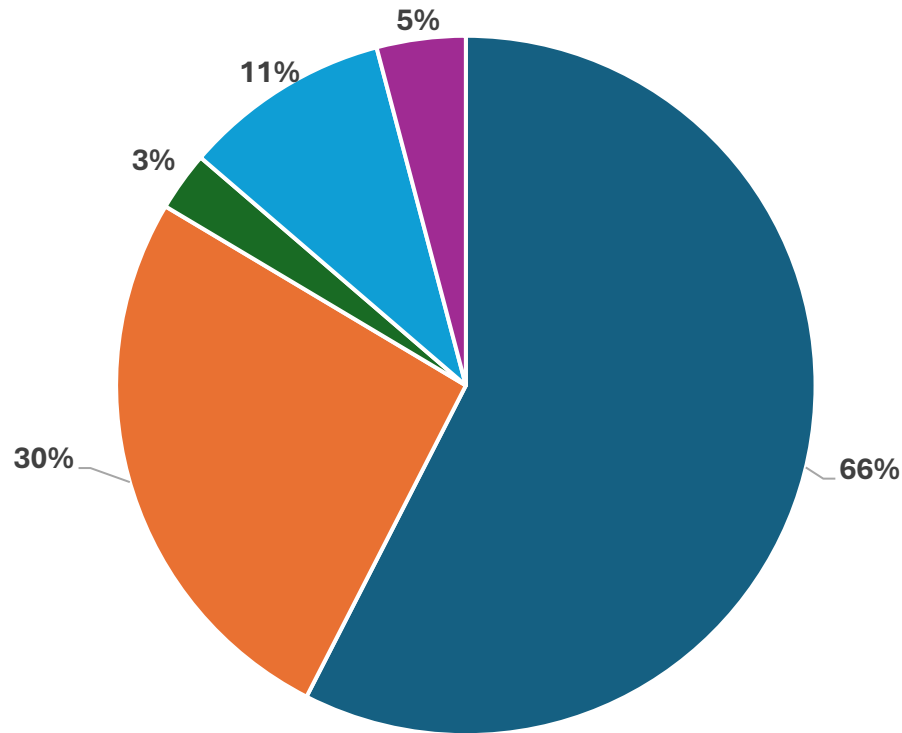


DISCLAIMER

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.

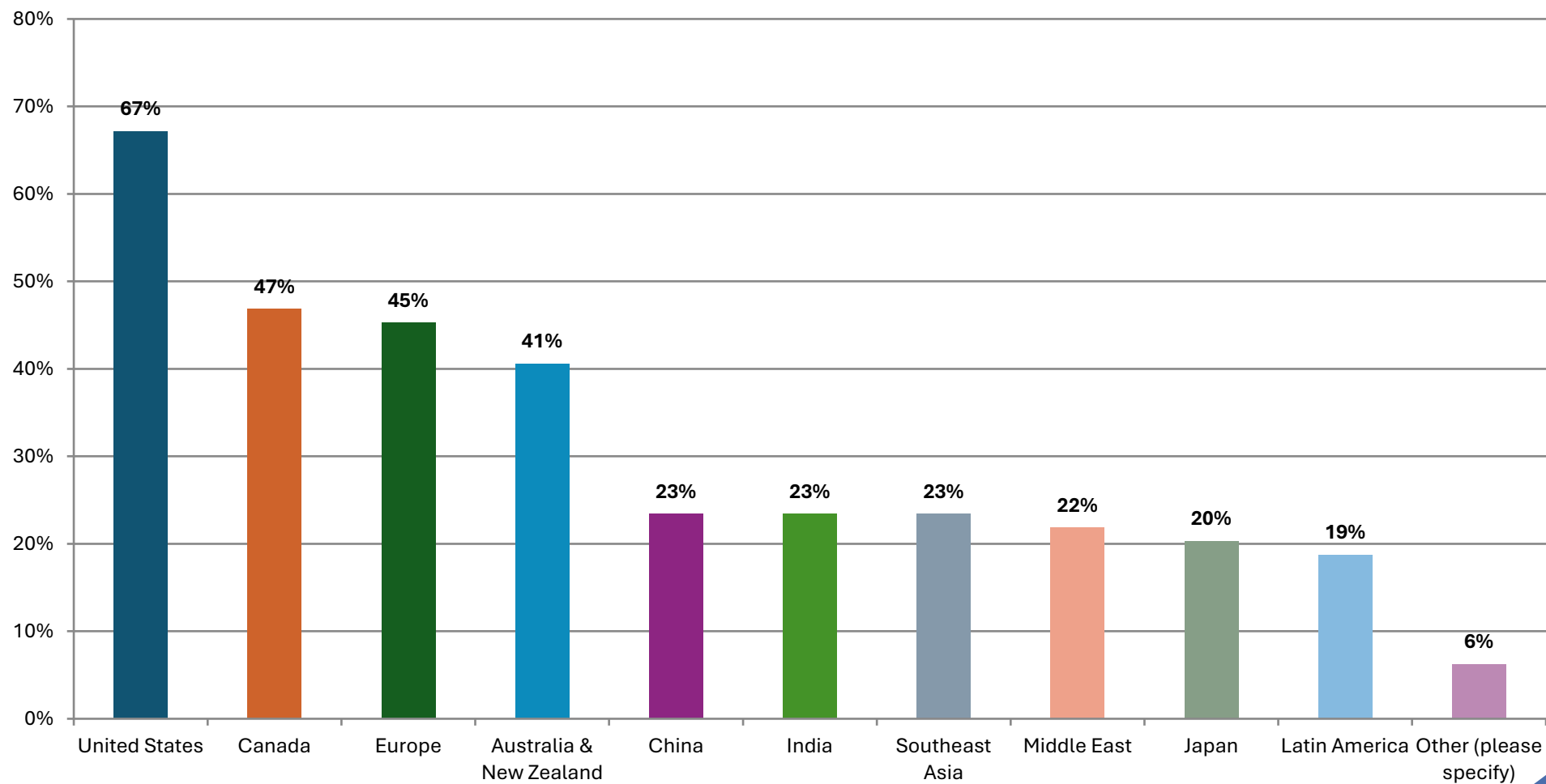
RESPONDENT PROFILE | BUSINESS TYPE



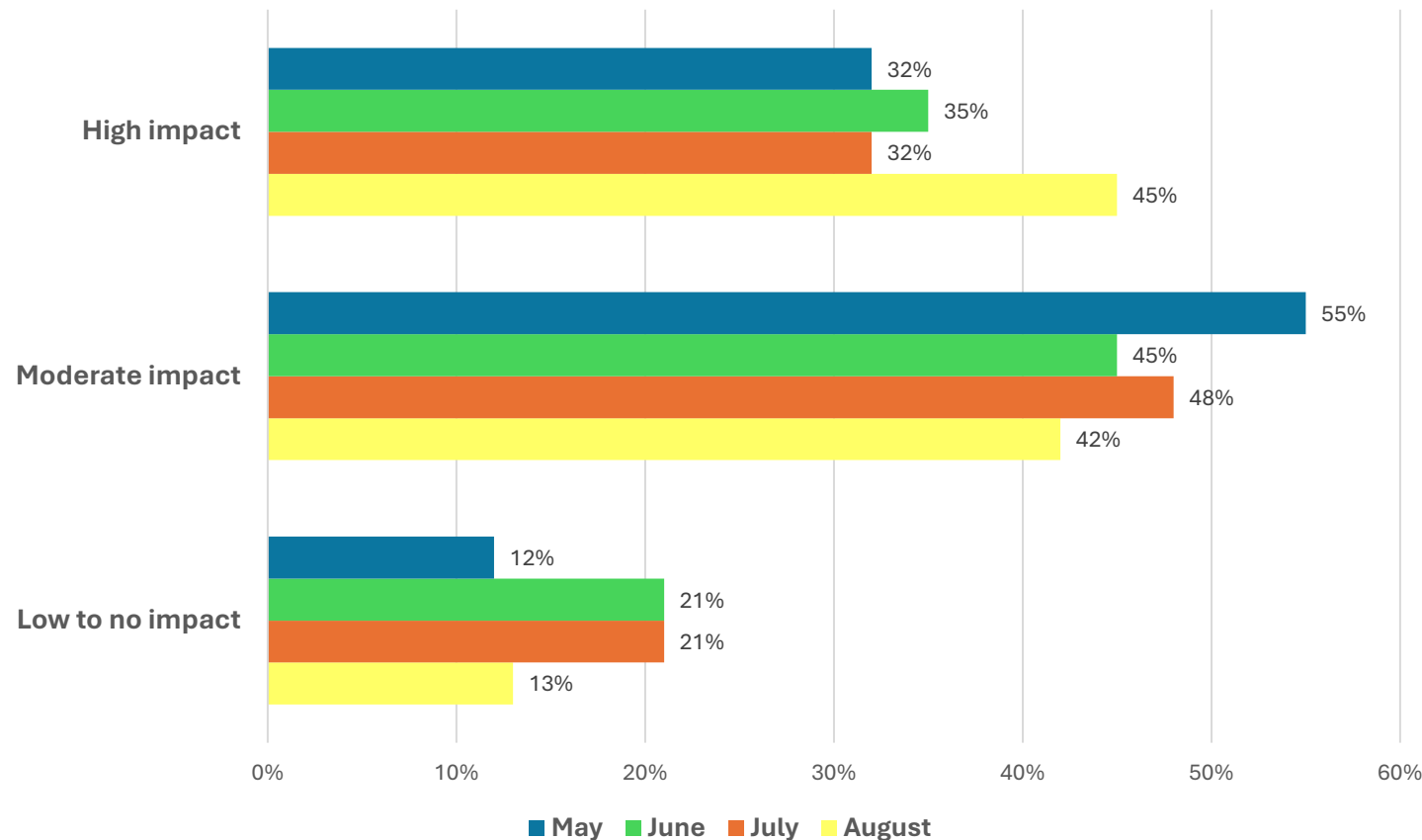
Based on a total of 64 survey responses, the respondent profile remains dominated by tour operators, wholesalers, agents and OTAs. DMC/local operators continue to account for over a third of respondents, maintaining the strong representation seen in the previous surveys.

- Tour Operators/Wholesalers/Agents/OTAs
- DMC / local operator
- Sightseeing/Tours/Activities/Ticketing
- MICE specialist
- Other (please specify)

RESPONDENT PROFILE | SOURCE MARKET



IMPACT OF THE MIDDLE EAST CRISIS ON BUSINESS

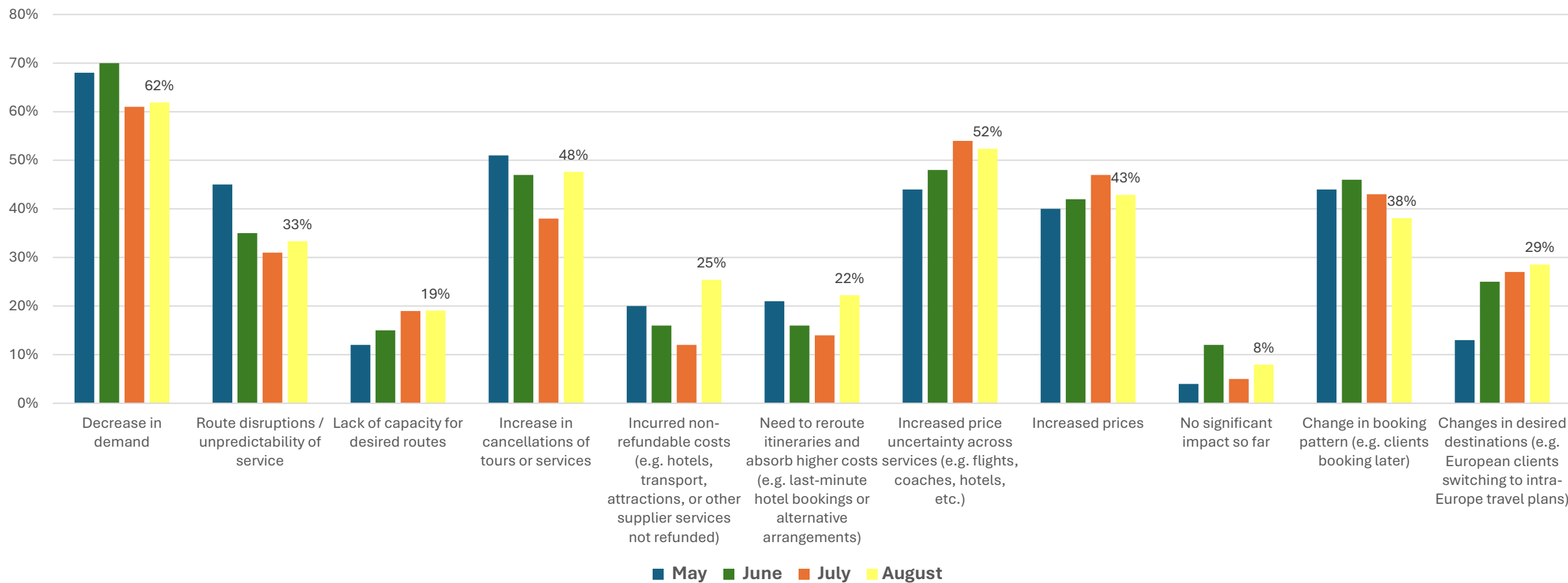


August results indicate a higher perceived business impact. The share reporting **high impact** increased to 45%, while **moderate impact** remained broadly in line with previous months.

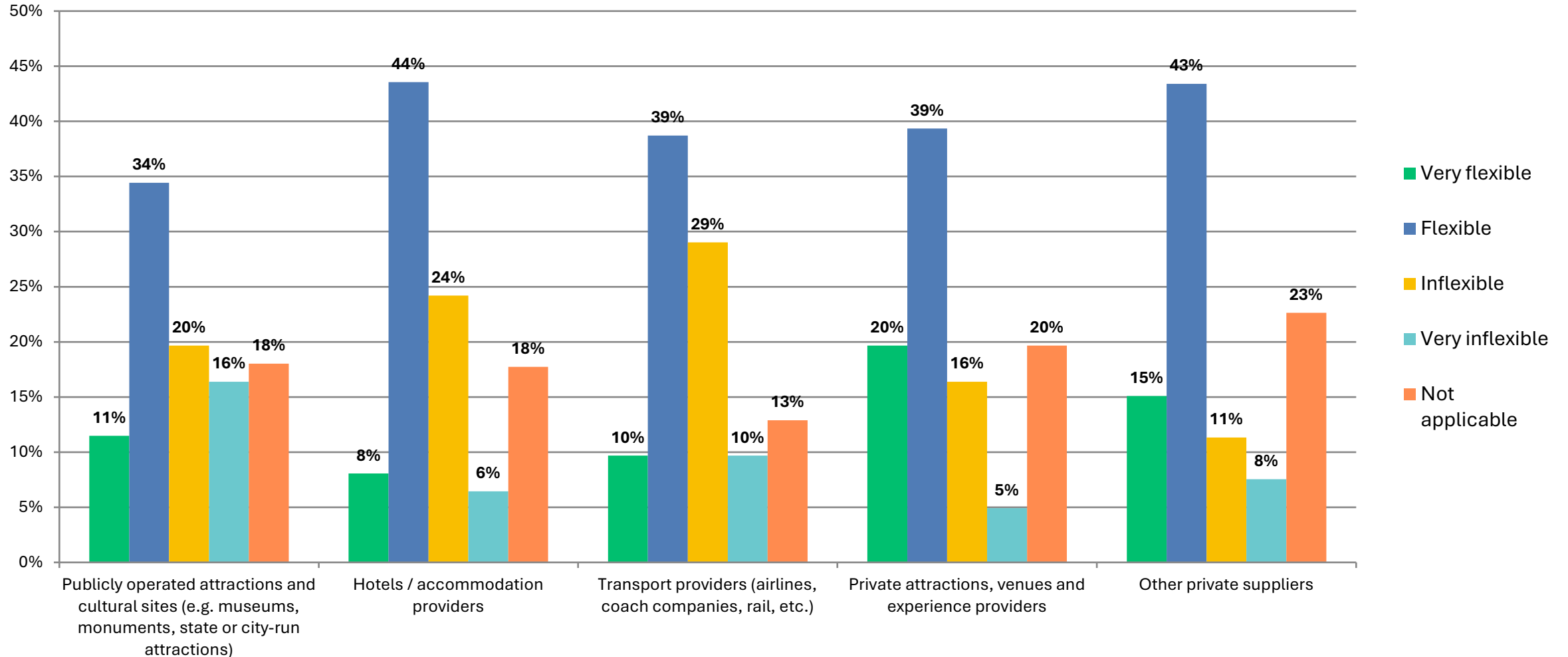
* *High Impact: Strong and sustained impact requiring major operational changes such rebooking/rerouting, cost mitigation, and/or strategic shifts e.g. to refocus on other markets and/or products.*

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

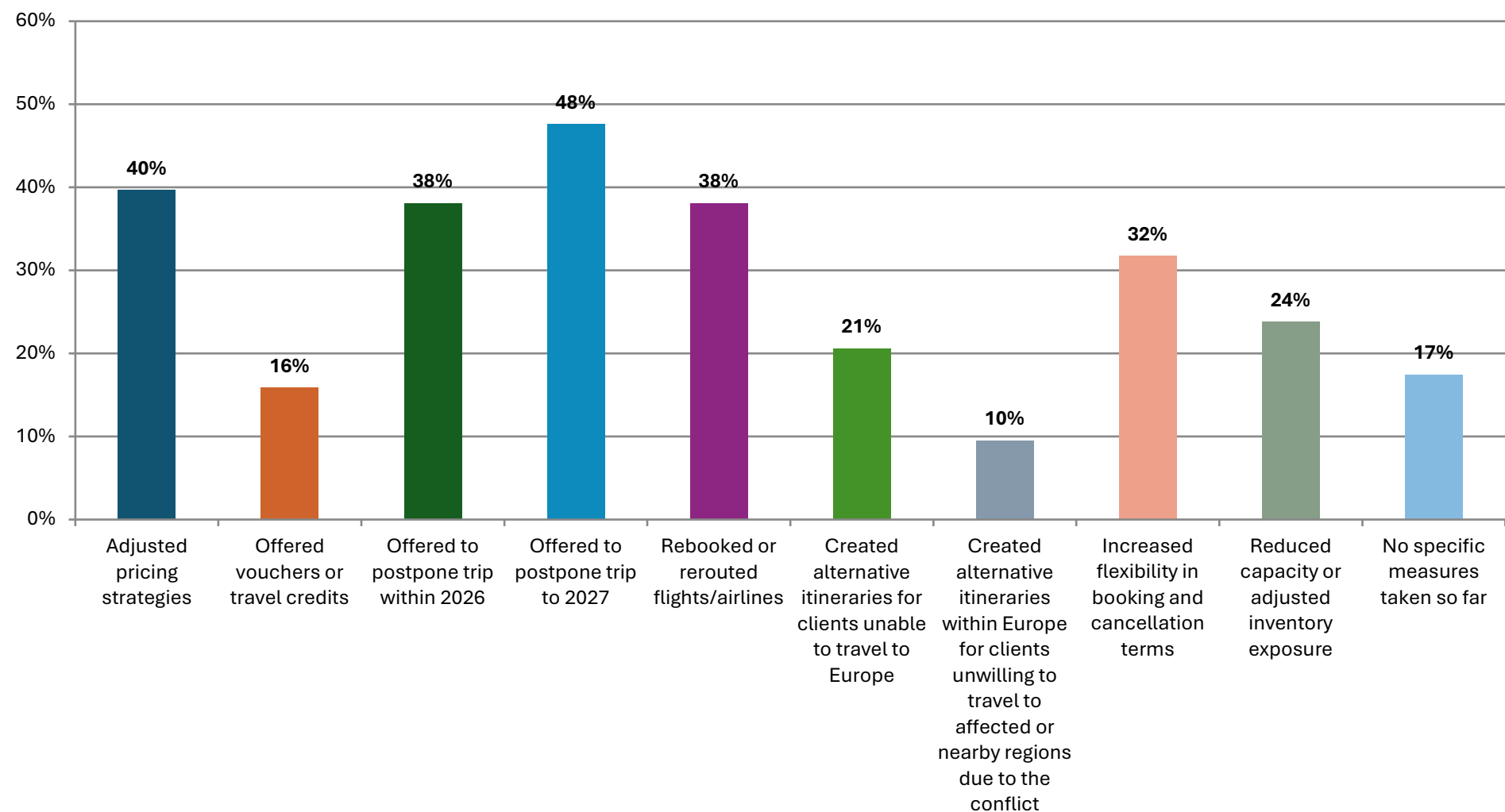
WHAT IMPACT DO YOU SEE?



PERCEIVED SUPPLIER FLEXIBILITY

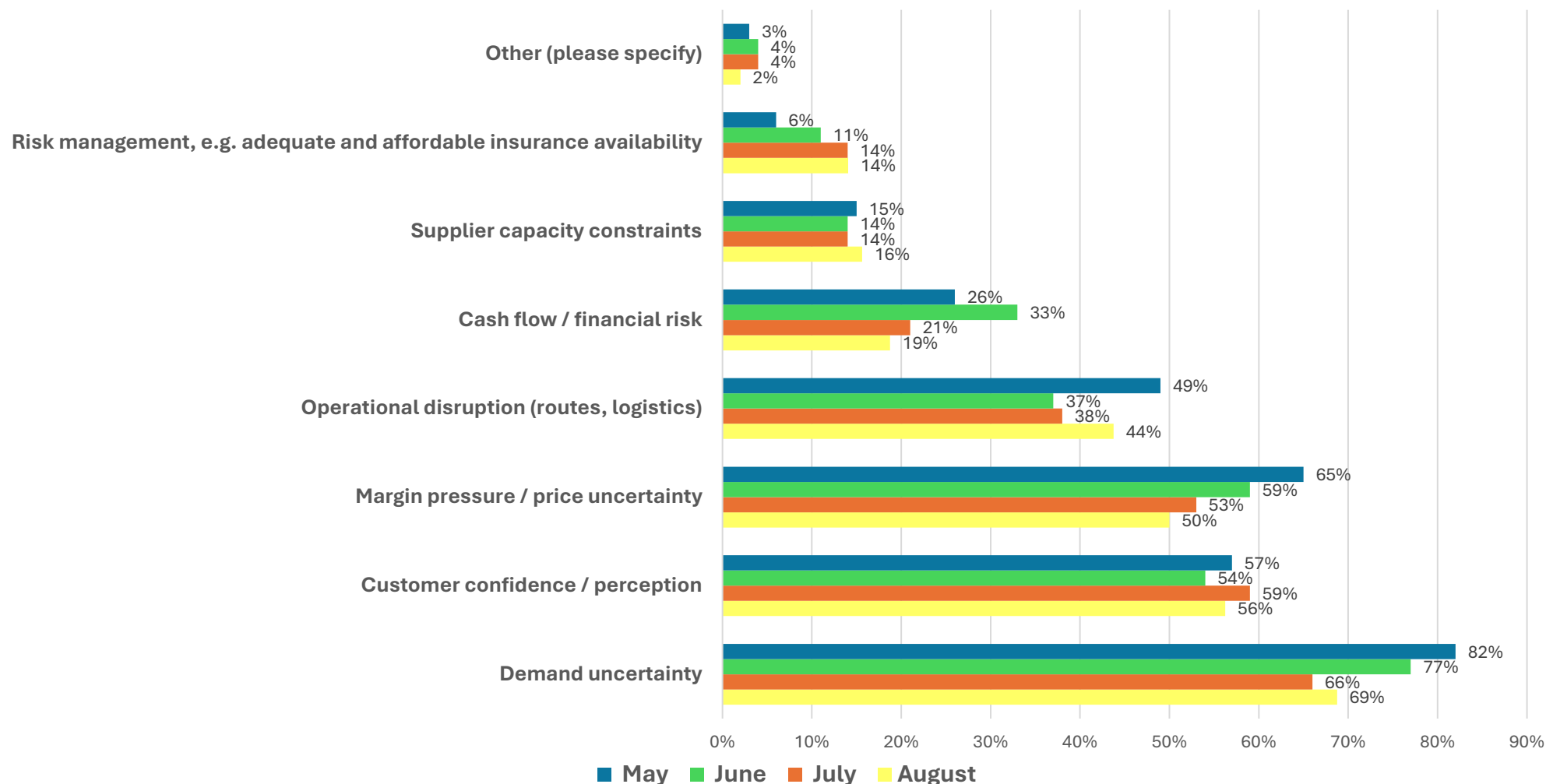


MEASURES IMPLEMENTED BY OPERATORS ETOA



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%).

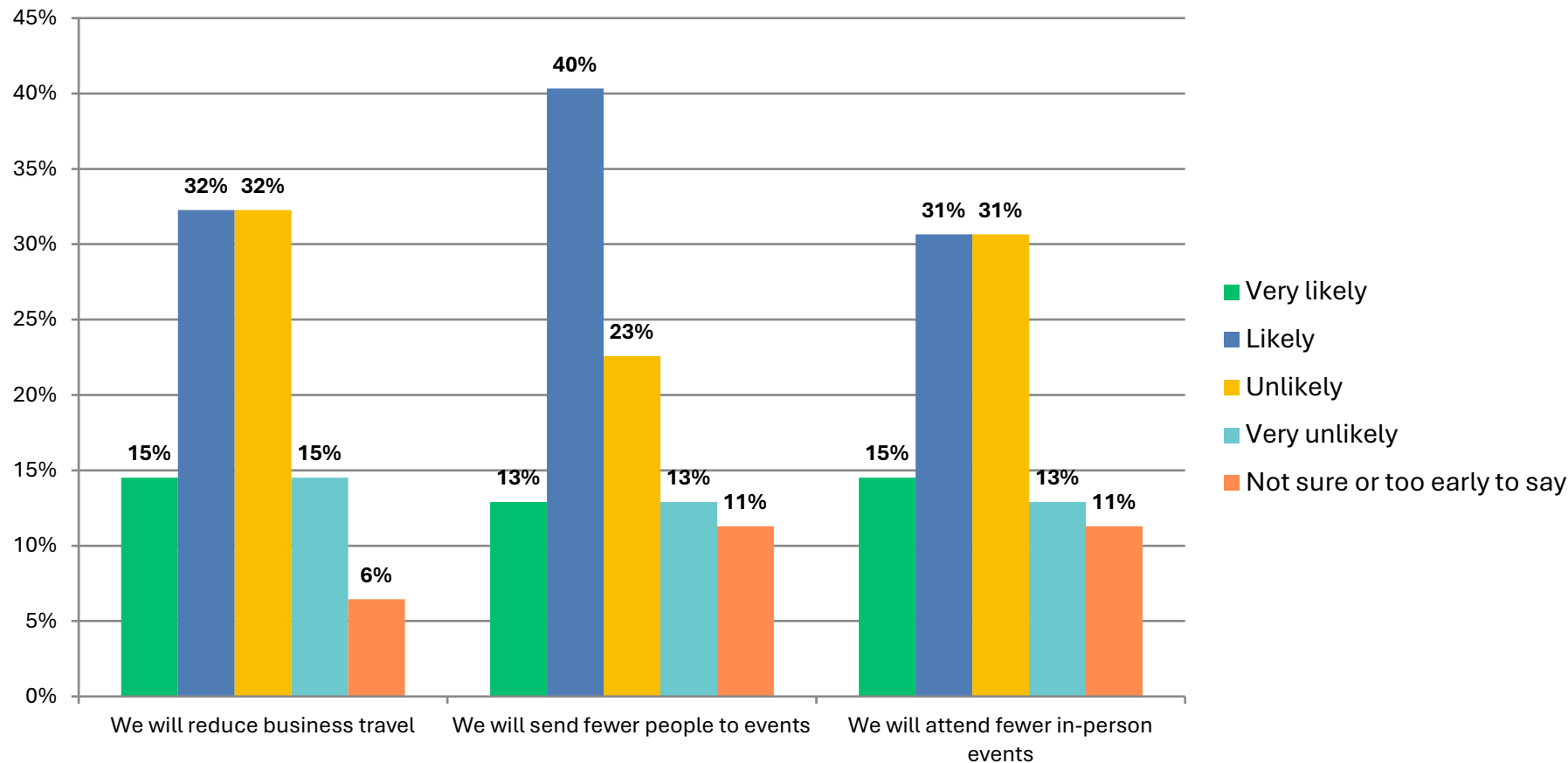
MAIN CONCERNS LOOKING AHEAD



IMPACT ON IN-HOUSE TRAVEL POLICY



Plans for the rest of 2026



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%)



THANK YOU
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