2020: The Year Travel Paused

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<td><strong>1. State of Travel in 2020</strong></td>
<td>Google search, YouTube video and other digital tourism trends in 2020</td>
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<td><strong>2. Recovery Signals</strong></td>
<td>2021 outlook and potential recovery signals</td>
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“It is darkest just before the dawn”
1. State of Travel in 2020
When Covid-19 hit the world, Google search queries related to travel declined for the first time in history.

**YoY Growth from 2016 to 2020 YTD**

- 2017: +13.5%
- 2018: +8.7%
- 2019: +8.1%
- 2020: -15.7%

**Evolution of Travel Queries QoQ 2016 to 2020 YTD**

Source: Google Internal Search Data, Travel & Tourism Queries (All Travel Product Tiers) Global (all countries | all languages), Q1 2016 to Q4 2020, YoY & QoQ Growth
The pandemic did not spare any of the travel & tourism sub-categories, although some were hit worse than others.

Source: Google Internal Search Data, YoY Growth, Travel Subcategories, Global (all countries all languages), January 2020 to December 2020 vs. previous period
Travel & Tourism websites globally lost ~40% of their traffic in 2020, while many other categories benefited.

Source: SimilarWeb, Tourism & Travel category vs. other categories, 2019 vs. 2020
The most asked question on Google related to travel in 2019 is fundamentally different from the one asked in 2020.

**TOP QUESTION RELATED TO TRAVEL IN YEAR 2019**

How to become a travel agent?

**TOP QUESTION RELATED TO TRAVEL IN YEAR 2020**

When can we travel again?

**FUN FACTS:**
- Travel queries with terms such as “near me”, “nearby” grew 54% from March 2020 to November 2020.
- Travel queries with terms such as “Road trip” grew 41% from March 2020 to November 2020.

Source: Google Internal Search Data, To Question Related to Travel, Global, 2019 vs. 2020
In fact, top 2020 travel questions users searched for on Google evolved MoM reflecting the dynamic public health situation:

March 2020: “How far does a sneeze travel?”

what is considered non essential travel
what is essential travel
how far does a cough travel
how long will travel ban last

August 2020: “When can I travel right now?”

what states have travel restrictions
when will international travel resume
when can we travel again
where can US citizens travel

November 2020: “Where to travel during Covid?”

what countries are open for travel
how to plan a road trip
where can I travel without quarantine
where to travel near me

Source: Google Internal Search Data, Global, March 2020 vs. August 2020 vs. November 2020
Unlike search video was on the rise - lockdowns and distancing led to growth in many video content categories

'Home School'
120% increase in views of videos with ‘home school’ in the title

With schools closed, parents and children turn to YouTube to continue their education at home.

'Home Office'
110% increase in views of videos with ‘home office’ in the title

When it comes to work, people turn to YouTube to maximize their work output.

'Home Workouts'
340% increase in views of videos with ‘Home workout’ in the title

Users turn to YouTube to maintain their workout schedules, and stay healthy.

YouTube data, Global, avg. daily views for 3/13 - 3/24 compared to views for 1/1 - 3/12.
People turn to online video to **adapt, cope and connect** - this creates new communication opportunities for destinations

**Study With Me**
52% increase in views y/o/y

As more and more young people adapt to at-home learning, students are leaning into *study with me* videos for companionship and motivation.

*YouTube data, Global. March 10 - March 16, 2020.*

**Pantry Meals**
49% increase in views y/o/y

When it comes to recipes, hungry users look to YouTube to learn how to put fresh spins on non-perishable items commonly found in their pantry.

*YouTube data, Global., Jan 1- March 16 2020 vs. same period in 2019.*

**Coping Techniques**
38% increase in views y/o/y

Recent weeks and months have given people a lot to worry about. From 5-minute meditation to stress relieving yoga, people turn to YouTube to learn new coping techniques to manage stress.

*YouTube Data, Global., Jan 1- March 16 2020 vs. same period in 2019.*

**At Home Workouts**
57% increased avg daily uploads

More than 8000 channels strong, YouTube's fitness community spans all sort of specialities, empowering users to maintain their workout schedules, despite challenging times.

Another trend brought on by the pandemic are staycations that became the alternative holiday option.

Search trend for “staycation” MoM (Global)

+154% YoY

2020

2019

Consumer surveys run globally show that:

18.3% Would take a vacation abroad

37.5% Would take a domestic vacation

Source: Google Internal Search Data, Global, “Staycation”, Jan 2019 to Dec 2019 vs. Jan 2020 to Dec 2020 | GWI, Question: Which of these products have you or your household purchased in the last 3-6 months? Asked in all GWI Core markets except: Morocco, Ghana, Kenya and Nigeria. Waves: Q3 2020 | Export Date: 03 February 2021
And while the way we travel might have changed, we never really stopped “dreaming” of a holiday.

With very dynamic travel restrictions and people spending more time at home than ever before, they’re looking for different ways to travel and energize:

1. **Remote places “closer to nature”**
   - Rising interest in:
     - Islands
     - Not crowded destinations
     - Camping

2. **Virtual Ways to Travel**
   - Rising interest in:
     - Virtual tours
     - Live zoo
     - Travel blogs

3. **Domestic Tourism**
   - Rising interest in:
     - Regional parks & rivers
     - “Near me”
     - Road trips
     - Staycations

4. **Family Cluster Activities**
   - Rising interest in:
     - Private vacation rentals
     - Open air sports (horse riding, hiking, golf, kayak)
     - Zoos & Aquariums

Source: Google Internal Search Insights, March 2020 to December 2020
2. Recovery Signals
Globally, most governments still have some form of travel restrictions in place.

Source: IATA, Feb 4th, 2021
Additionally, constant changes in travel requirements lead to insecurity and apprehension to travel

We continue to see a surge in queries related to government travel restrictions, safety measures when traveling & quarantine rules

1. MAKING SENSE OF GOVERNMENT TRAVEL RESTRICTIONS:
   - what does non essential travel mean
   - what is essential travel
   - when will travel restrictions be lifted
   - how long will travel restrictions last
   - what are the travel restrictions

2. SAFETY
   - when will it be safe to travel again
   - how to travel safely during covid
   - what is the safest way to travel
   - how safe is air travel
   - what countries are safe to travel to

3. QUARANTINE RULES
   - where can you travel without quarantine
   - how to quarantine after travel
   - how many days quarantine covid
   - when to quarantine
   - how to self isolate after travel
As a result, global travel queries remain much lower than last year

Very few destinations managed to attract global travelers interest amidst covid scare

Despite uncertainty, some destinations grew in interest MoM

<table>
<thead>
<tr>
<th>TOP GROWTH BY DESTINATION COUNTRY</th>
<th>TOP GROWTH BY DESTINATION CITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Maldives</td>
<td>1 Malé</td>
</tr>
<tr>
<td>2 United Arab Emirates</td>
<td>2 Dubai</td>
</tr>
<tr>
<td>3 Egypt</td>
<td>3 Colombo</td>
</tr>
<tr>
<td>4 Indonesia</td>
<td>4 Sharm El-Sheikh</td>
</tr>
<tr>
<td>5 South Korea</td>
<td>5 Denpasar</td>
</tr>
<tr>
<td>6 Armenia</td>
<td>6 Yerevan</td>
</tr>
<tr>
<td>7 Georgia</td>
<td>7 Tbilisi</td>
</tr>
<tr>
<td>8 Malaysia</td>
<td>8 Kuala Lumpur</td>
</tr>
<tr>
<td>9 India</td>
<td>9 Cancún</td>
</tr>
<tr>
<td>10 Mexico</td>
<td>10 Busan</td>
</tr>
</tbody>
</table>

Source: Google Destination Insights, 1 December 2020 to 30 January 2021, vs. October to November 2020 Top Growing Destinations Worldwide
Vaccine & travel related queries grew +658% since the start of mass vaccination campaigns at the end of December 2020.
Interest for Vaccine Tourism also grew sharply in the past few weeks

Search query volume (indexed) for “Vaccine Tourism” - Global

Source: Google Trends, “Vaccine Tourism”, last 12 months, Global
Countries that have the highest vaccination rate seem to be the most likely to travel abroad in the next few months.

Table: Vaccination administered per 100 people by geography

- **Israel**: 60.19
- **United Arab Emirates**: 36.04
- **United Kingdom**: 16.19
- **United States**: 10.64
- **North America**: 6.29
- **Denmark**: 5.15
- **European Union**: 3.35
- **Asia**: 1.06
- **South America**: 0.71
- **Africa**: 0.03

*Likely to travel abroad in the next 6 months*
- **North America**: 18%
- **South America**: 20.8%
- **Africa**: 15.9%
- **UK**: 40.3%

Source: Our World in Data, Cumulative COVID-19 vaccination doses administered per 100 people, by country/continent, 20 dec 2020 to 4 feb 2021 | GWI, February 2021, Which of these items are you / your household thinking about purchasing in the next 3-6 months?, 46 countries
There is some optimism in various surveys that tourism might start to recover in H2 2021

<table>
<thead>
<tr>
<th>Country</th>
<th>Q4 2020</th>
<th>Q1 2021</th>
<th>Q2 2021</th>
<th>Q3 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>37%</td>
<td>35%</td>
<td>50%</td>
<td>58%</td>
</tr>
<tr>
<td>Canada</td>
<td>20%</td>
<td>22%</td>
<td>33%</td>
<td>59%</td>
</tr>
<tr>
<td>Brazil</td>
<td>42%</td>
<td>52%</td>
<td>47%</td>
<td>65%</td>
</tr>
<tr>
<td>Mexico</td>
<td>40%</td>
<td>46%</td>
<td>55%</td>
<td>65%</td>
</tr>
<tr>
<td>Germany</td>
<td>22%</td>
<td>22%</td>
<td>41%</td>
<td>57%</td>
</tr>
<tr>
<td>UK</td>
<td>22%</td>
<td>25%</td>
<td>52%</td>
<td>64%</td>
</tr>
<tr>
<td>France</td>
<td>32%</td>
<td>29%</td>
<td>43%</td>
<td>62%</td>
</tr>
<tr>
<td>Italy</td>
<td>25%</td>
<td>24%</td>
<td>44%</td>
<td>76%</td>
</tr>
<tr>
<td>China</td>
<td>47%</td>
<td>48%</td>
<td>50%</td>
<td>60%</td>
</tr>
<tr>
<td>Japan</td>
<td>32%</td>
<td>33%</td>
<td>39%</td>
<td>49%</td>
</tr>
<tr>
<td>Australia</td>
<td>35%</td>
<td>41%</td>
<td>47%</td>
<td>56%</td>
</tr>
</tbody>
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Regardless of recovery pace, it is clear that the future of travel sales will be online driven.

Source: Statista, Forecast, Travel & Tourism Worldwide, 4 year projection, Adjusted to Covid-19 impact, Sep 2020
In the immediate future though, people will be prioritizing extended vacations, short booking windows and local options.

**Latest search behaviour in Travel Globally:**

**Longer Stay Intention**

- **Average trip duration**
  - **#days** between departure and return dates.
  - 7 days pre-pandemic
  - 11 days in January 2021

**Shortened Lookahead**

- **Average Lookahead Window**
  - **#days** between search and departure dates.
  - 57 days pre-pandemic
  - 42 days in January 2021

**Local Travel Radius**

- Majority of destination-based accommodation queries are local.
  - (Regional: 38% | Domestic: 44% | Continent: 11% | World: 6%)

Source: Google Internal Search Data, Air & Accommodation, Global, January 2020 vs. January 2021
Thank You!