

2020: The Year Travel Paused

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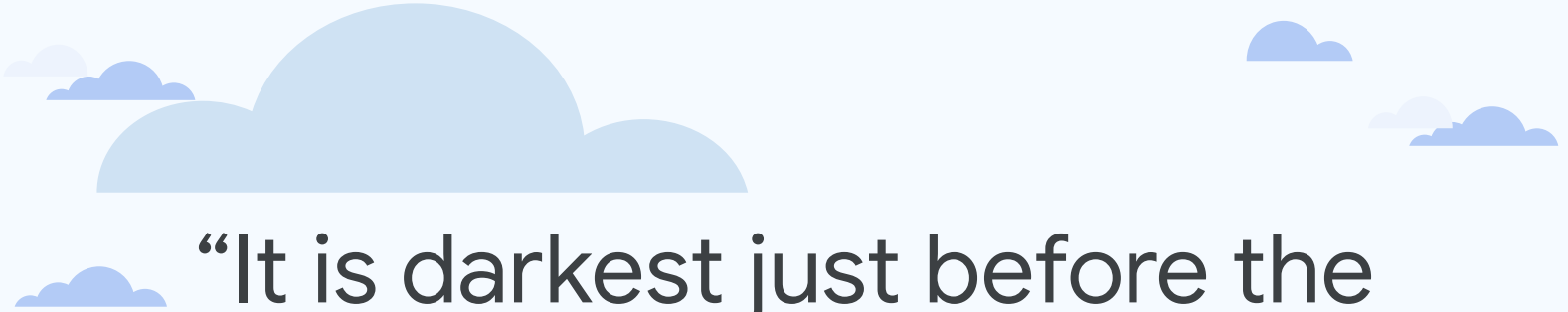
Agenda

1. State of Travel in 2020

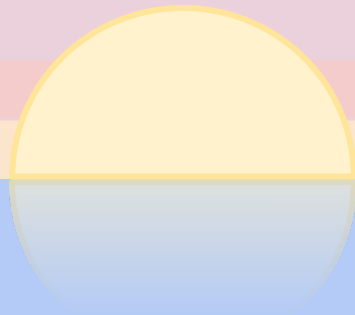
Google search, YouTube video and other digital tourism trends in 2020

2. Recovery Signals

2021 outlook and potential recovery signals

The sky is light blue and contains several stylized clouds. On the left, there is a large light blue cloud with a smaller white cloud behind it, and a small blue cloud below it. On the right, there is a small blue cloud, a small white cloud, and a small blue cloud below it.

“It is darkest just before the
dawn”

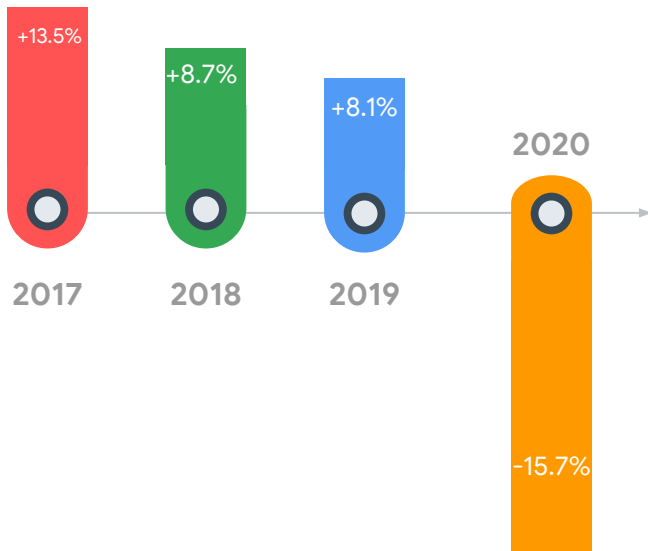




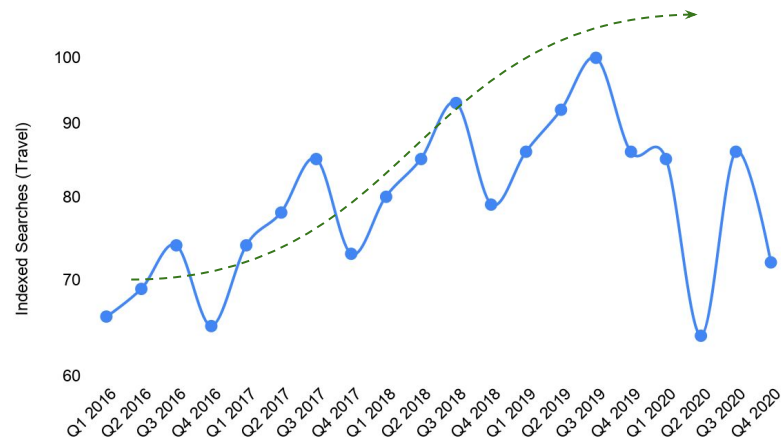
1. State of Travel in 2020

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

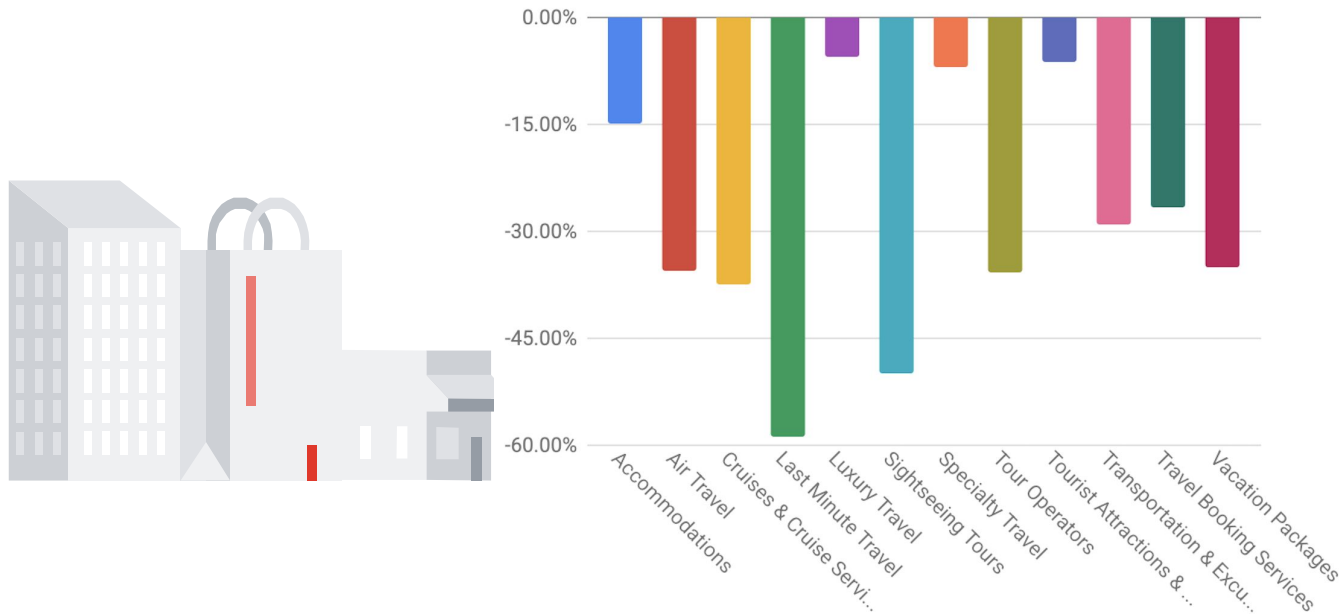


Evolution of Travel Queries QoQ 2016 to 2020 YTD



The pandemic did not spare any of the travel & tourism sub-categories, although some were hit worse than others

YoY Growth by Travel Category (2020 vs. 2019)



Travel & Tourism websites globally lost ~40% of their traffic in 2020, while many other categories benefited

Total visits to Travel & Tourism Websites globally



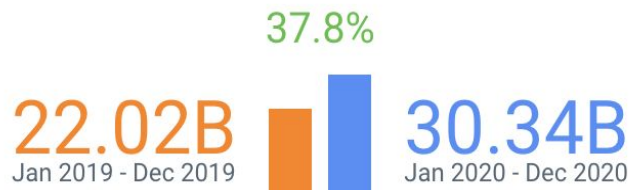
vs. Total visits to **Education websites** globally



vs. Total visits to **e-commerce & shopping websites** globally



vs. Total visits to **Food and drink websites** globally



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?



Google Search

I'm Feeling Lucky

VS.

TOP QUESTION RELATED TO TRAVEL IN YEAR 2020

When can we travel again?



Google Search

I'm Feeling Lucky

Indicate the NEED to travel

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



In fact, top 2020 travel questions users searched for on Google evolved MoM reflecting the dynamic public health situation

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

August 2020:

“When can I travel right now?”



March 2020:

“How far does a sneeze travel?”



November 2020:

“Where to travel during Covid?”

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

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

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.

YouTube data, Global, avg. daily views for 3/13 - 3/24 compared to views for 1/1 - 3/12.

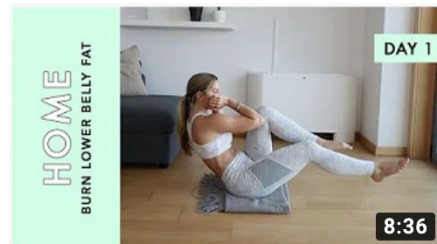


'Home Office'

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.

YouTube data, Global. Views for 3/13 - 3/24 compared to views for 1/1 - 3/12



'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, 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.

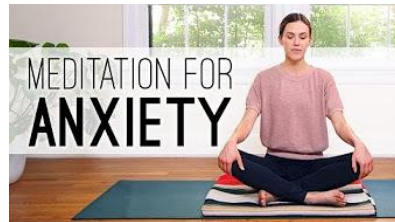
YouTube data, Global. March 10 - March 16, 2020.



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.



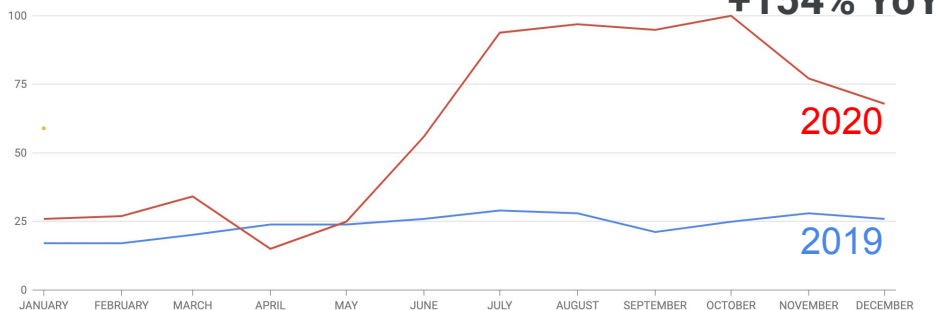
At Home Workouts 57% increased avg daily uploads

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

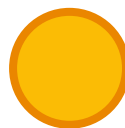
YouTube Data, Global, January 1 - March 18, 2020. Avg daily uploads of videos with 'workout at home' in the title since March 10, 2020.

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

Search trend for "staycation" MoM (Global)



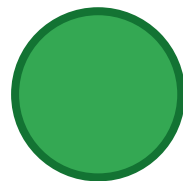
Consumer surveys run globally show that:



18.3%

Would take
a **vacation**
abroad

VS.



37.5%

Would take
a **domestic**
vacation

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



2. Recovery Signals



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

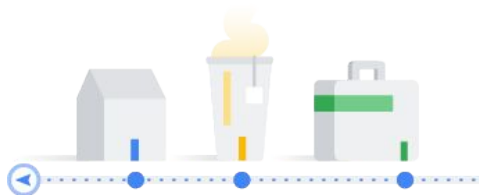
1. MAKING SENSE OF GOVERNMENT TRAVEL RESTRICTIONS:

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

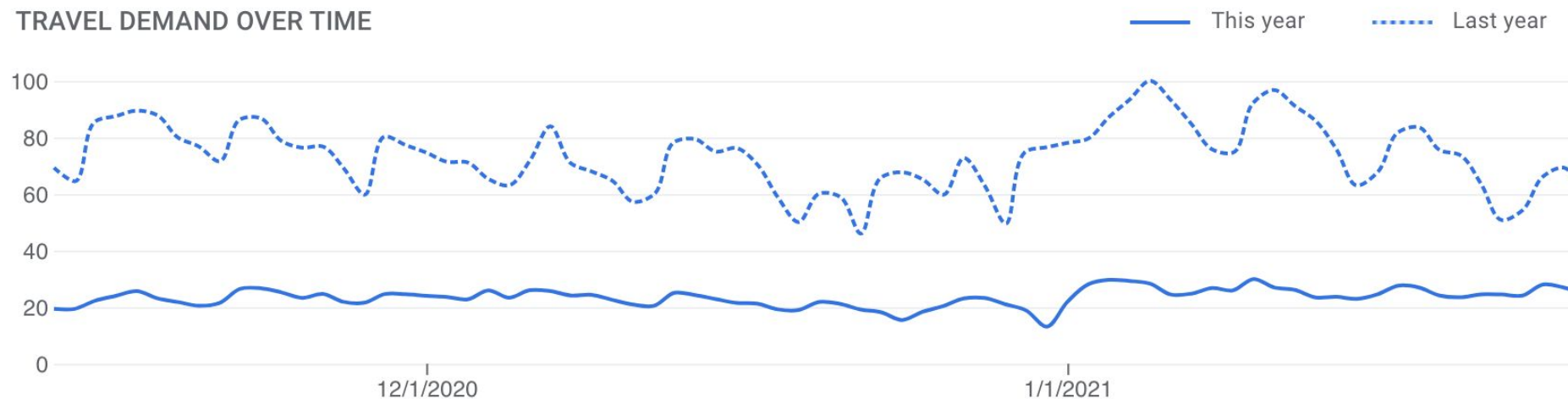
where can you travel without quarantine
how to quarantine after travel
how many days quarantine covid
when to quarantine
how to self isolate after travel



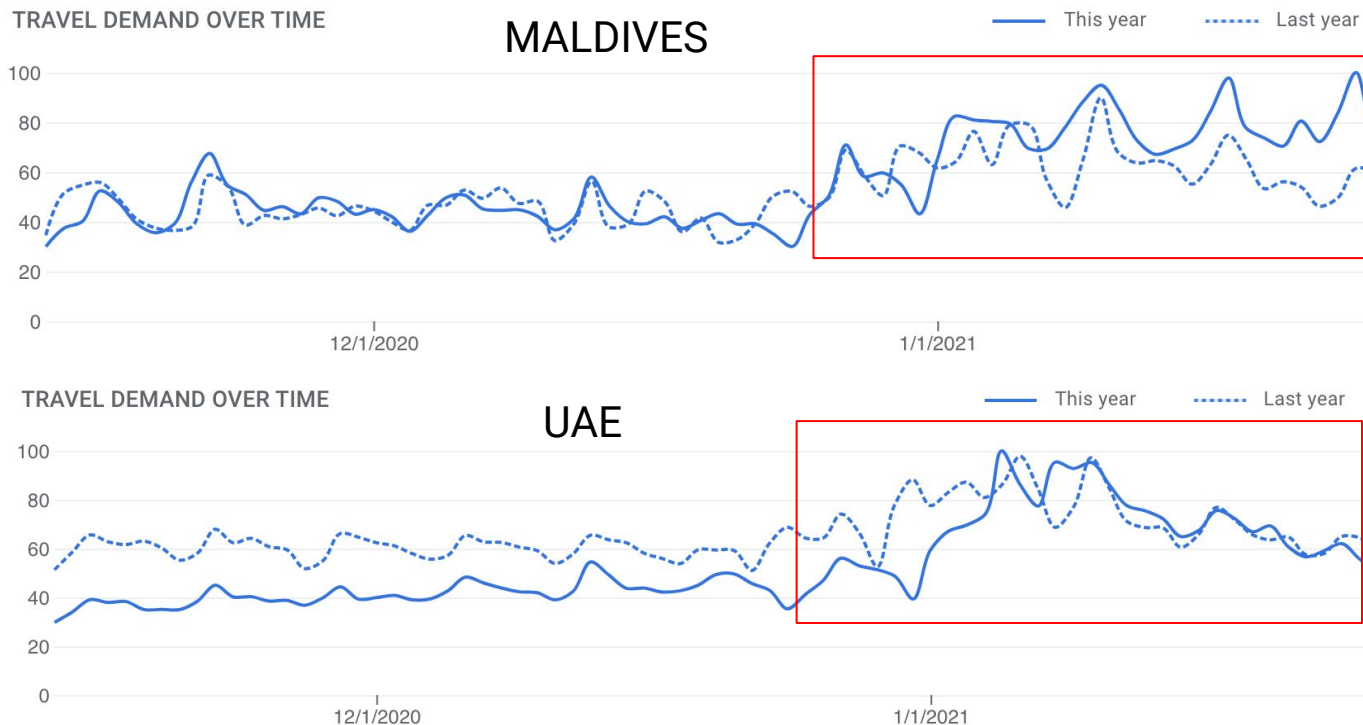
As a result, global travel queries remain much lower than last year

GLOBAL

TRAVEL DEMAND OVER TIME



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



Despite uncertainty, some destinations grew in interest MoM

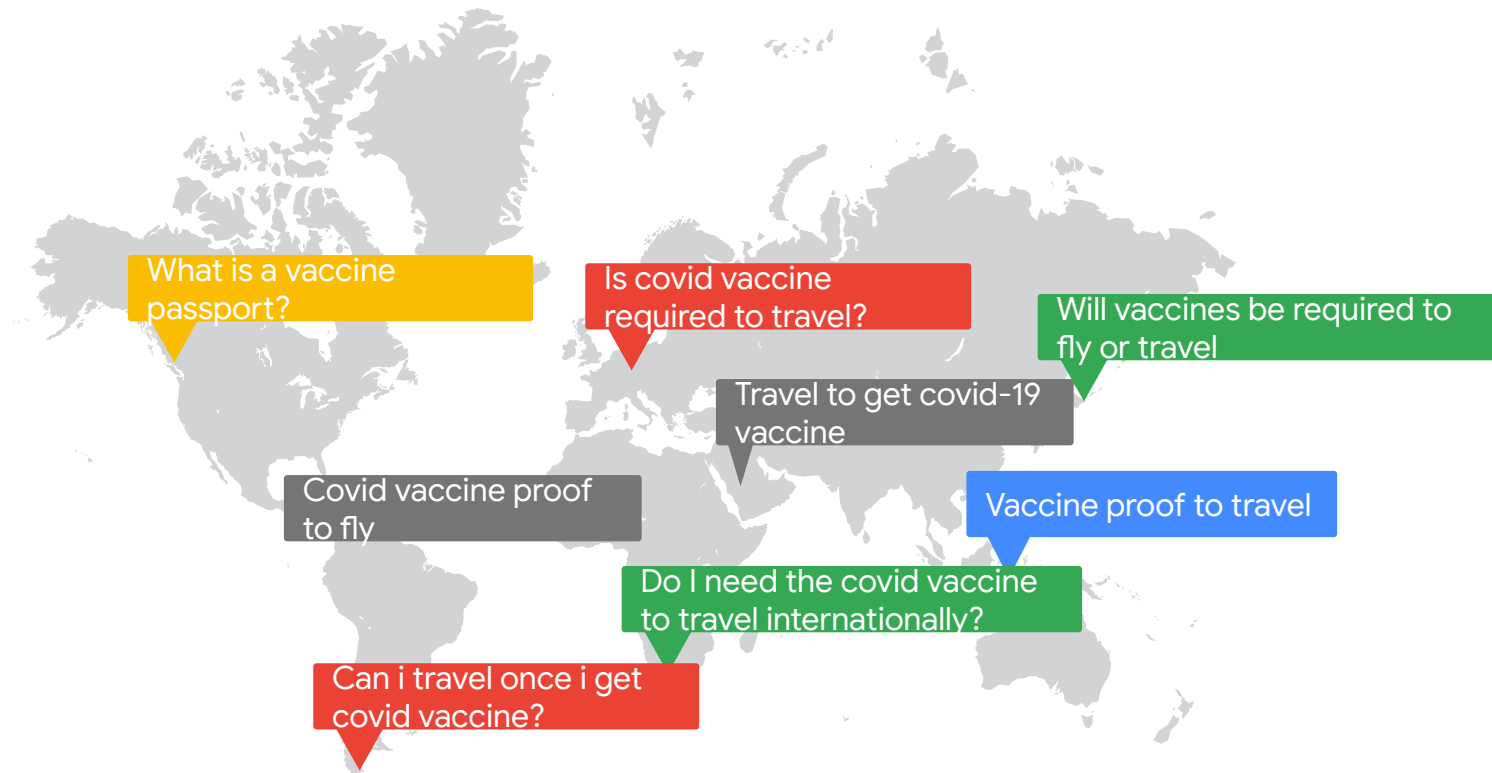
TOP GROWTH BY DESTINATION COUNTRY

1	Maldives	Over 75%	↑
2	United Arab Emirates	Over 75%	↑
3	Egypt	50% to 75%	↑
4	Indonesia	50% to 75%	↑
5	South Korea	50% to 75%	↑
6	Armenia	25% to 50%	↑
7	Georgia	25% to 50%	↑
8	Malaysia	25% to 50%	↑
9	India	25% to 50%	↑
10	Mexico	25% to 50%	↑

TOP GROWTH BY DESTINATION CITY

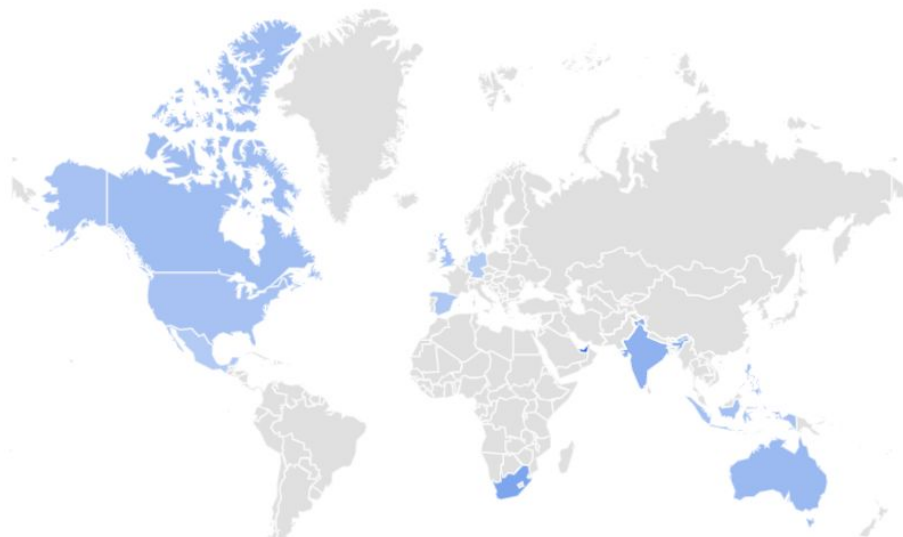
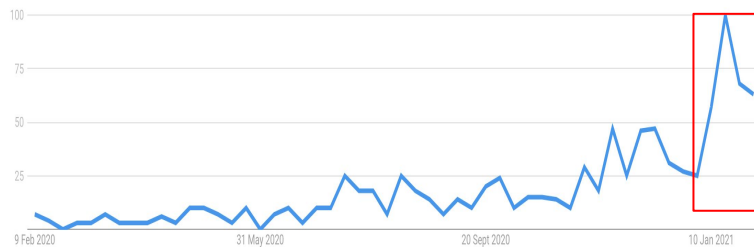
1	Malé	Over 75%	↑
2	Dubai	Over 75%	↑
3	Colombo	Over 75%	↑
4	Sharm El-Sheikh	50% to 75%	↑
5	Denpasar	50% to 75%	↑
6	Yerevan	25% to 50%	↑
7	Tbilisi	25% to 50%	↑
8	Kuala Lumpur	25% to 50%	↑
9	Cancún	25% to 50%	↑
10	Busan	25% to 50%	↑

Vaccine & travel related queries grew +658% since the start of mass vaccination campaigns at the end of December 2020



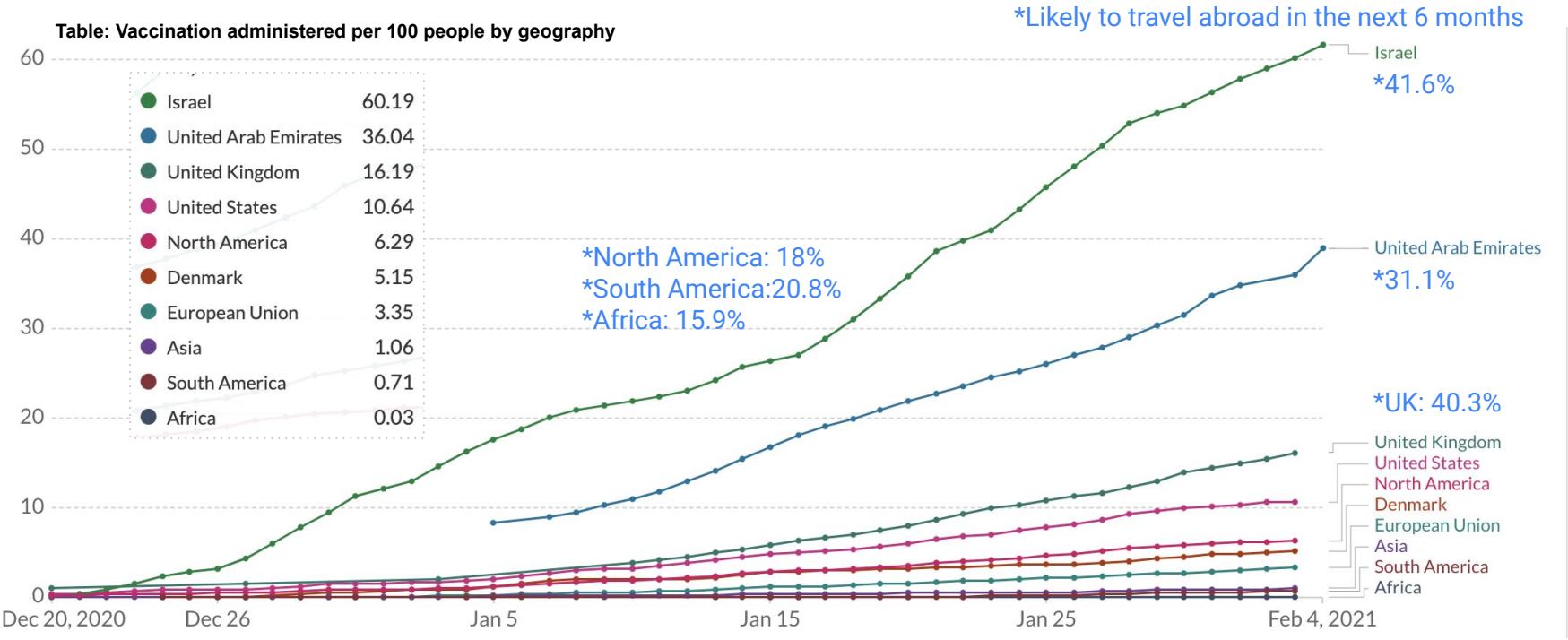
Interest for Vaccine Tourism also grew sharply in the past few weeks

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



1	United Arab Emirates	100	<div></div>
2	Singapore	50	<div></div>
3	South Africa	34	<div></div>
4	India	23	<div></div>
5	Australia	16	<div></div>

Countries that have the highest vaccination rate seem to be the most likely to travel abroad in the next few months



There is some optimism in various surveys that tourism might start to recover in H2 2021

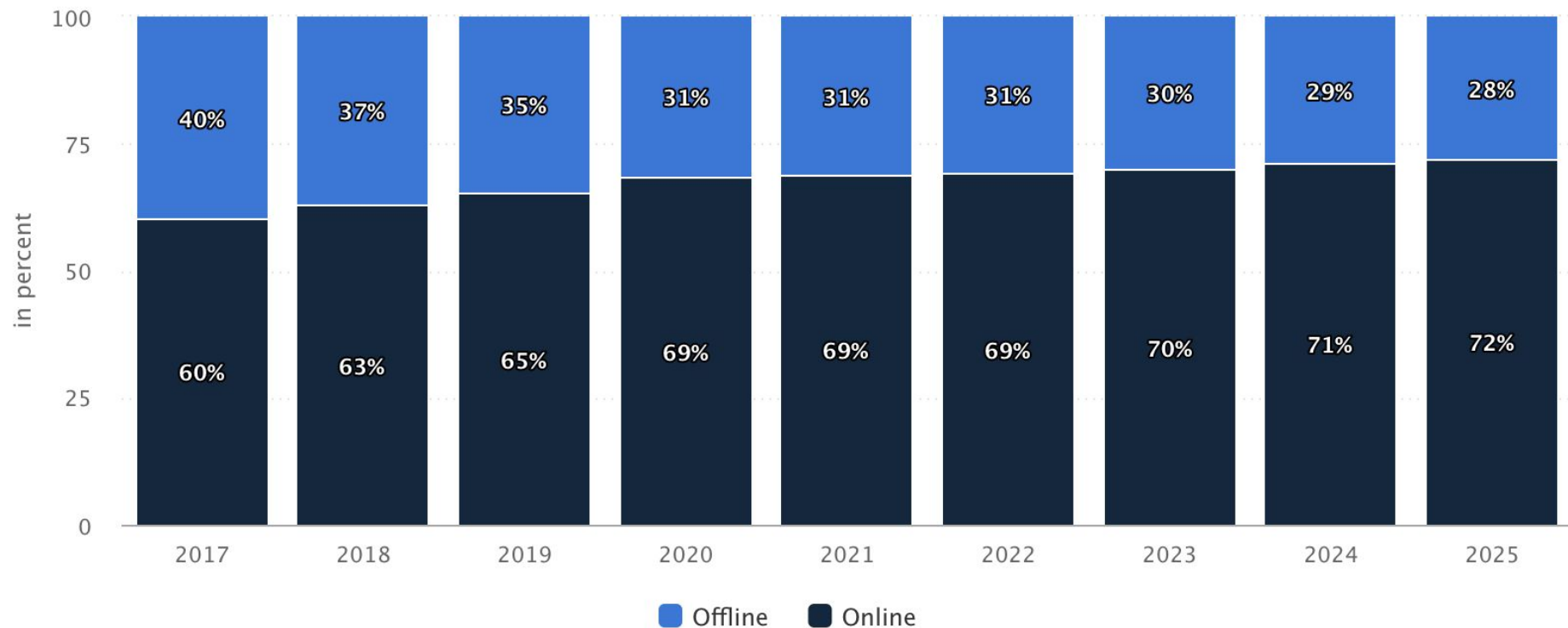
Coronavirus Impact: When Adults in Select Countries Feel Comfortable Traveling, Oct 2020

% of respondents

	Q4 2020	Q1 2021	Q2 2021	Q3 2021
US	37%	35%	50%	58%
Canada	20%	22%	33%	59%
Brazil	42%	52%	47%	65%
Mexico	40%	46%	55%	65%
Germany	22%	22%	41%	57%
UK	22%	25%	52%	64%
France	32%	29%	43%	62%
Italy	25%	24%	44%	76%
China	47%	48%	50%	60%
Japan	32%	33%	39%	49%
Australia	35%	41%	47%	56%

Note: ages 25+
Source: Expedia Group Media Solutions, "Traveler Sentiment & Influences: 2020-2021," Dec 10, 2020

Regardless of recovery pace, it is clear that the future of travel sales will be online driven



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.

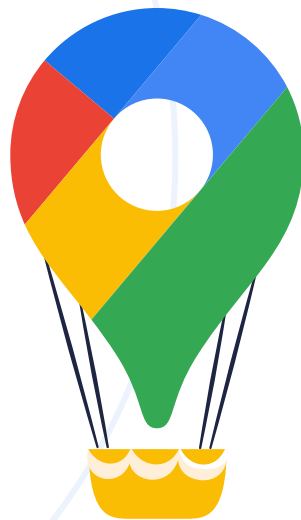
57 days
pre-pandemic

42 days
in January 2021

Local Travel Radius

Majority of destination-based accommodation queries are local.

(Regional: 38% | Domestic: 44% |
Continent: 11% | World: 6%)



Thank You!