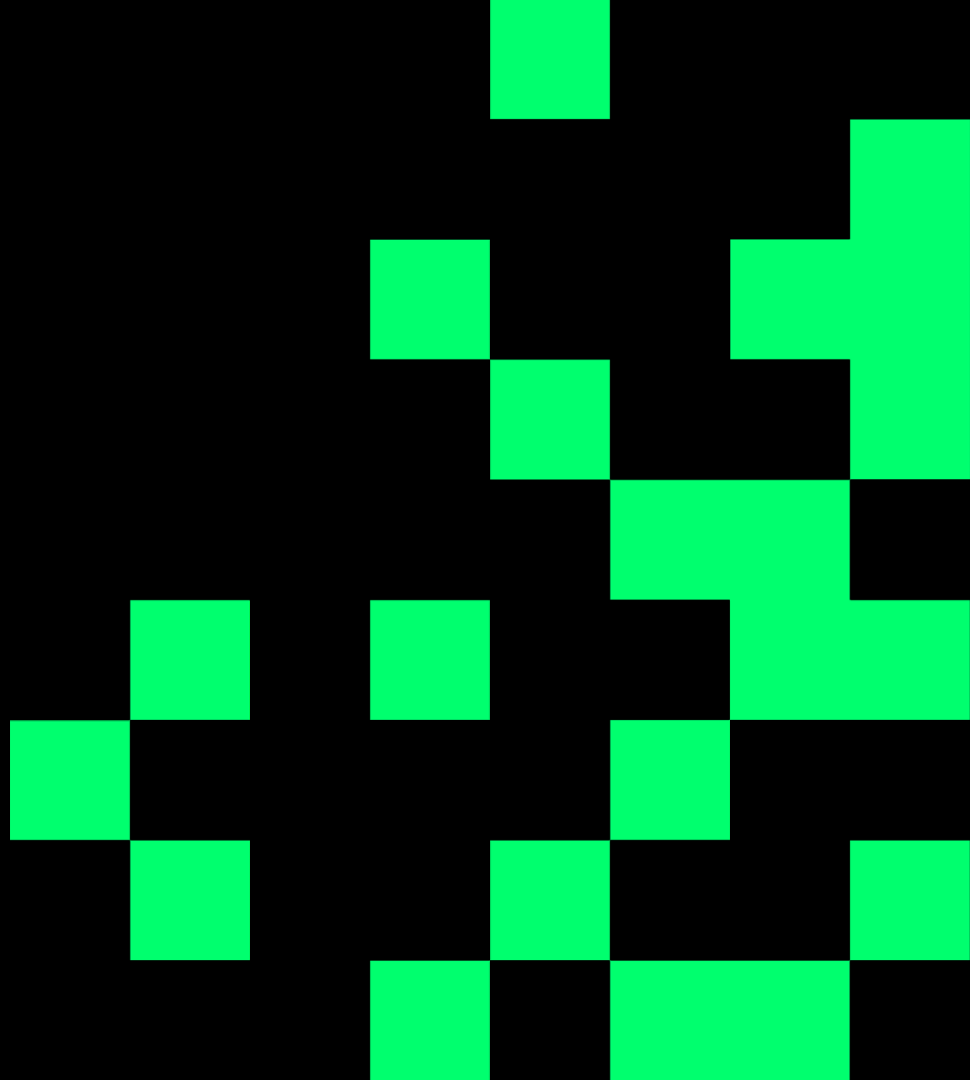


Travel Tracker

August 3, 2020

Consumer Behavior Patterns



COVID-19: Travel Tracker

Jan. 4 – July 29, 2020

As COVID-19 spread around the world this past spring, economies slowed to a crawl and nearly every industry felt some level of uncertainty. To help marketers gain an understanding of what's to come, Hybrid Theory is analyzing data from online behavior across 18M websites to determine key consumption habits. These insights can reveal how the public is responding and help marketers make important decisions on budgets, media plans, and strategy.

As the pandemic nears its fifth month, public sentiment appears to shift from searching for a rosy recovery towards acclimating and adapting to the new normal. Travel marketers should consider the findings from this research as consumers test the waters of travel while balancing safety and practicality.



Key Takeaways

1

Searches for “hotels” have surpassed “airlines,” and “flights,” suggesting increased interest in local travel and road trips.

2

A 269% increase in “road trip” searches suggests that travel demand is shifting primarily toward one form of travel.

3

27% YoY increase in camping interest.

4

While a majority of Americans express an appetite for travel, most say they would currently not be able to enjoy a leisure trip.



Hybrid Theory Research

Flight, Airline, Hotel



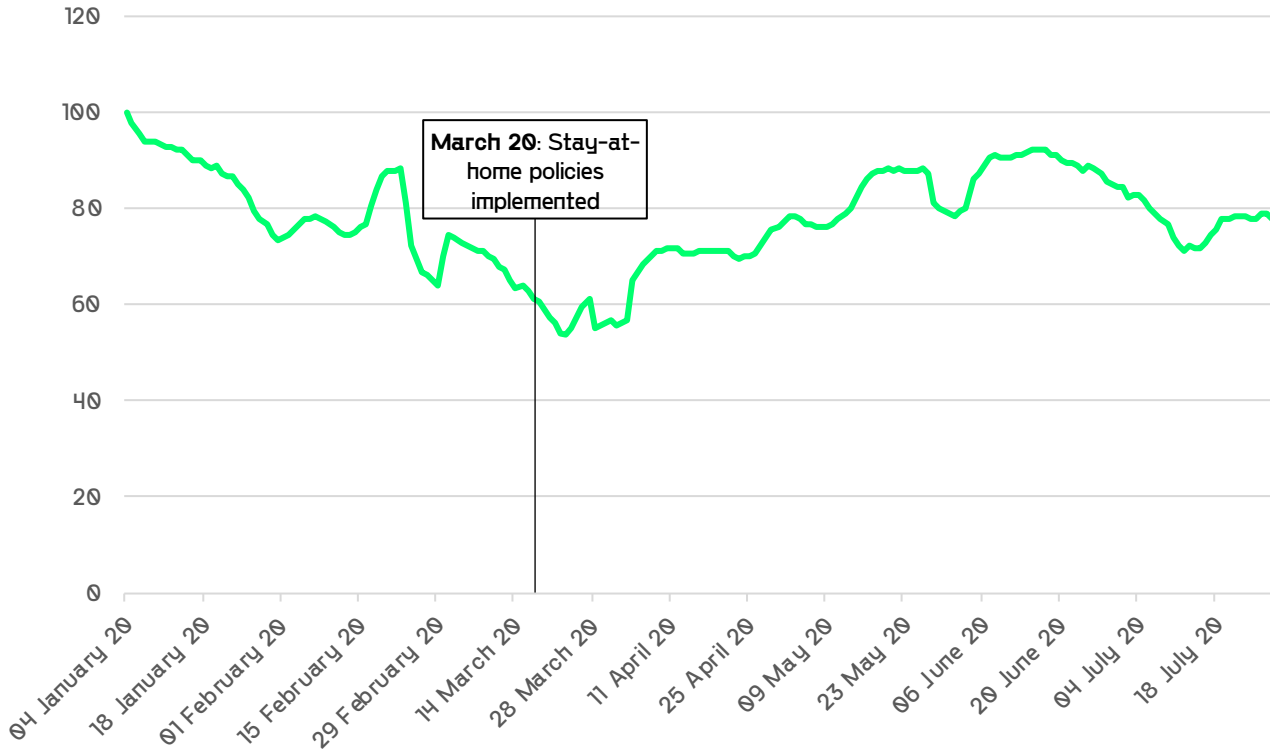
Highlights

Searches for "hotels" have recently surpassed searches for "airlines," and "flights," suggesting increased interest in local travel and road trips.



Hybrid Theory Research

Vacation, Holiday, Trip



Highlights

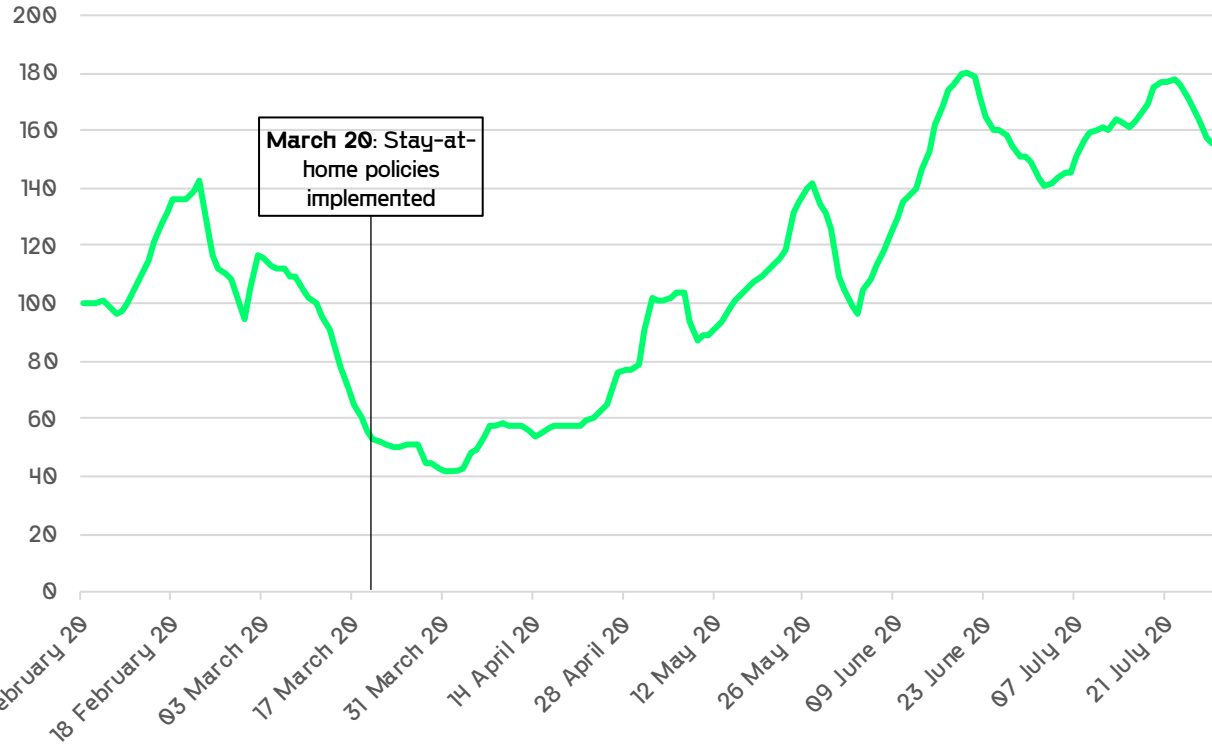
There have been few new peaks in searches for “vacation,” “holiday,” and “trips.” Interest increased from April through May, before leveling off in June and taking a downturn in July.



Hybrid Theory Research

Highlights

Road Trip



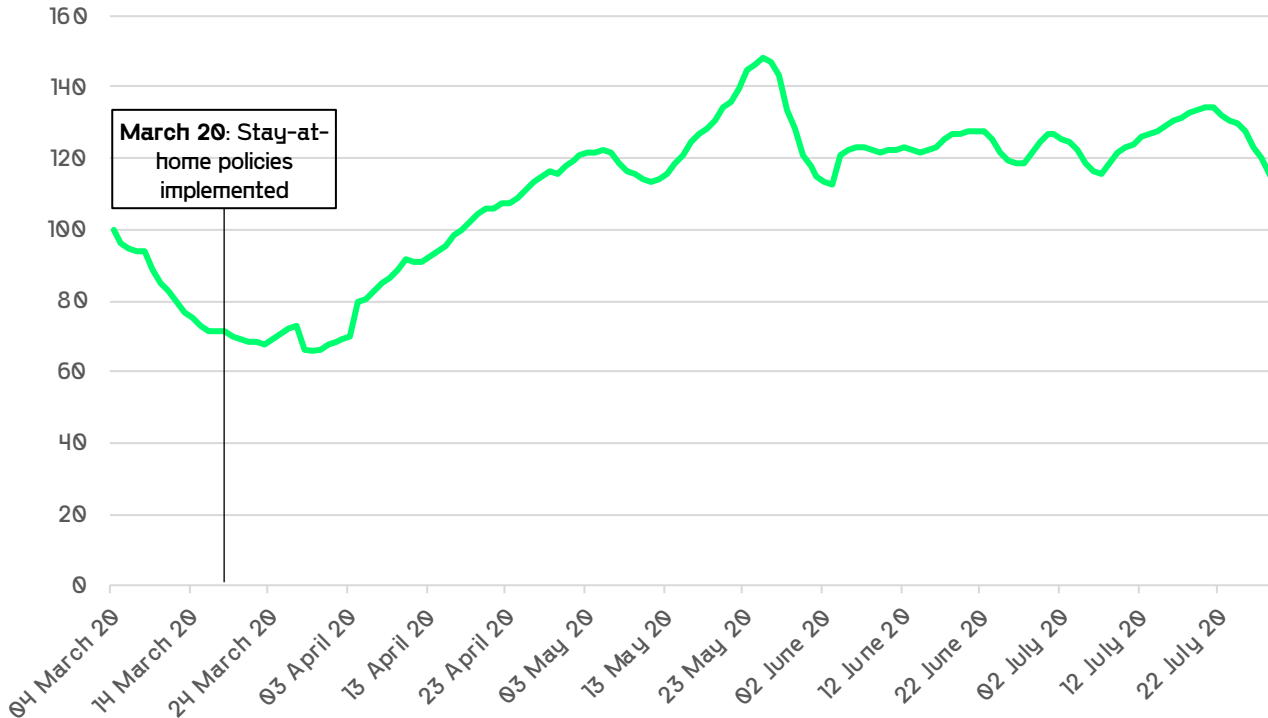
269%
increase

in “road trip” searches since
April 1, although growth is
seen in fits and starts.



Hybrid Theory Research

Outdoor Activities Aggregate
(Hiking, Swimming, Mountain Biking, Picnic)



Highlights

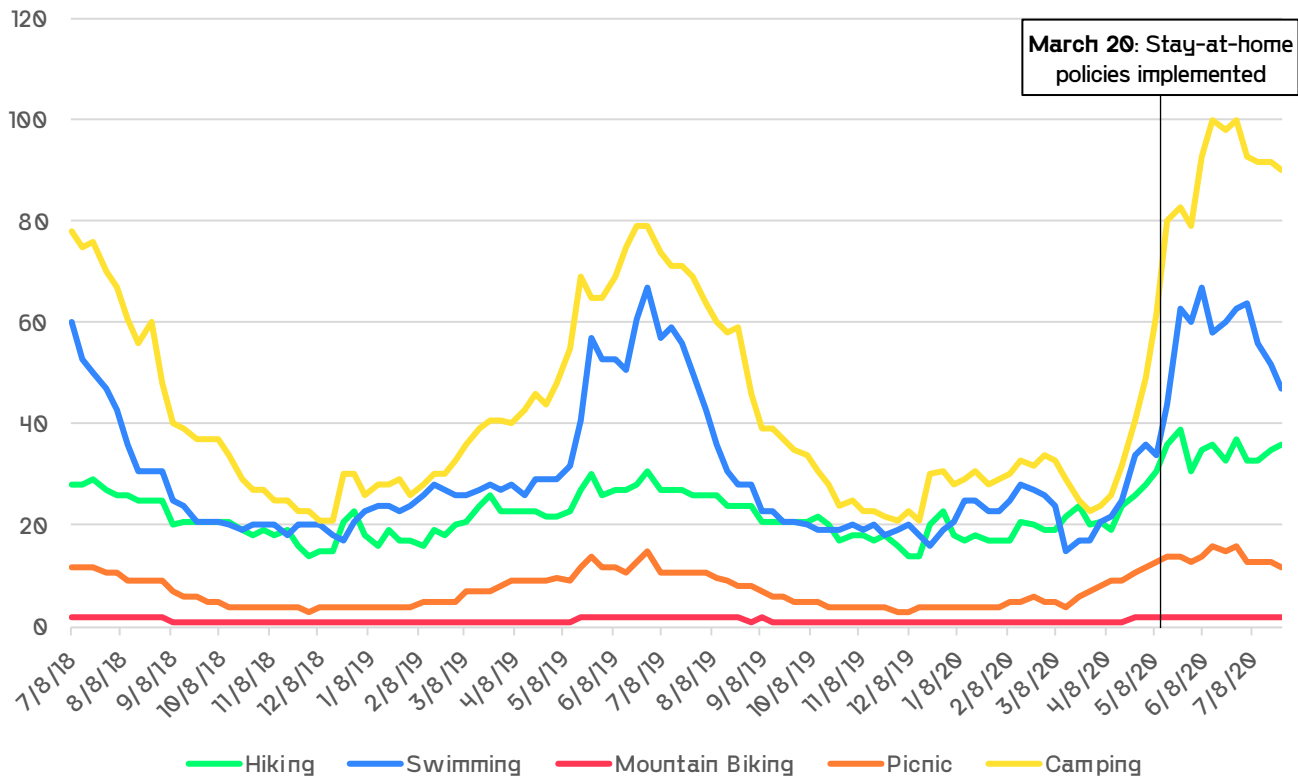
Interest in outdoor activities has shown considerable growth since early spring, peaking over the Memorial Day and 4th of July weekends.

It will be interesting to see if data will follow traditional seasonal patterns or sustain its current trajectory.



3rd-Party Research*

Outdoor Activities: Year-over-Year



Highlights

27%

YoY increase

in camping interest in late June. Searches for "hiking" also showed slight increases from the same period last year, while "swimming," "picnic," and "mountain biking" all remained consistent.

**Data provided by Google Trends*



3rd-Party Research*

61%

Of Americans say that if they were to travel now for leisure, they would not be able to fully enjoy it.

-74%

TSA screenings from July 21 – July 28, 2020 compared to the same period last year.

69%

Agree that if they were to get a COVID-19 vaccine in 2020, they would be likely to travel in the first half of 2021.

-7%

Domestic bookings to Wyoming, YoY (the lowest YoY decline). New York has the highest YoY decline (-83%).

**Data provided by Destination Analysts, TSA, Engagious, and ADARA.*





Methodology

- This data was collected from browse, search, and share data from 18 million websites globally within Hybrid Theory's data network
- The data tracks mentions of key terms in Hybrid Theory's browse, search, and share logs
- Over 20 billion log events have been analyzed across 6 countries since January, 2020
- Data collection range: January 4 – July 29, 2020
- This data will be refreshed, analyzed, and circulated every two weeks



About Hybrid Theory

Hybrid Theory is a global programmatic marketing company with offices in New York, Boston, London, Singapore, Sydney, and Hong Kong. We specialize in predicting real-time opportunities when customers are in-market and serving relevant creative to engage new customers with personalized messaging across display, native, and video.

We combine our real-time data and advanced targeting strategies to serve relevant advertising to the right user based on their interest and intent signals. We can also combine our data with creative to display the most personalized message in your ad to deliver incremental success over time.



The logo consists of a square grid of 3x3 cells. The top row has a solid black cell, a white cell with a black border, and a solid black cell. The middle row has a white cell with a black border, a solid black cell, and a white cell with a black border. The bottom row has a solid black cell, a white cell with a black border, and a solid black cell.

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