



The Lean: Travel Insights Brief

Vol. 1 | August, 2021

Timely Consumer Insights for Marketers



Situational Overview

Most Americans were homebound for the better part of 2020, giving them plenty of time to think about and plan for their next vacation. So when local and state officials began easing travel restrictions and mask mandates, consumers wasted no time packing their bags for some much needed R&R and travel fun!

Memorial Day, an important indicator marketers use to gauge the upcoming summer travel season, generated a 60% increase of consumers that traveled more than 50 miles from home in 2021 compared to 2020.¹ Air travel during the same period was up nearly 450% from the previous year. That works out to a total of 1.3 million people and an average of 52,947 people traveling through the airport that weekend.²

As early signs started to point to a much stronger travel season than 2020, travel brands looked to nudge consumers even more by spending more than \$210 million in U.S. advertising during June. That's more than double their spending during the same period a year earlier, and slightly down from 2019 levels.³ The surge in travel continued through July as 48 million Americans took to the roads during the 4th of July weekend, outpacing 2020 when only 34.2 million Americans traveled during the same weekend. What's more, GroundTruth foot traffic data revealed that hotel stays increased 41% from June to July.

While the recent uptick in travel points to improved consumer optimism, growing concerns about the COVID-19 Delta variant is once again keeping marketers on their toes as they look to navigate yet another critical period within the pandemic.


In our latest Lean Insights Brief: Travel Vol. 1, we look at some of the verticals that benefited from the recent travel surge and some of the most traveled states and vacation destinations. As we head into the homestretch of 2021, we also explore how new Covid-19 Delta variant trends could begin to turn summer travel tailwinds into headwinds as brands start developing their holiday marketing strategies.

About The Lean

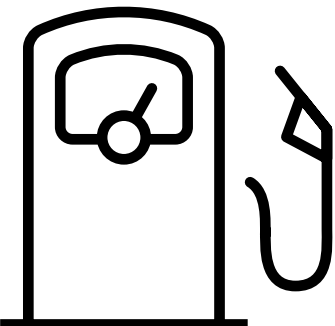
Between professional careers and personal lives, we understand that there is very little time left to read drawn out whitepapers. This is why we created The Lean, meaningful marketing insights to help brands make strategic decisions about their marketing campaigns. Designed for easy consumption and quick reference, each issue of The Lean applies offline behavioral data filters and other industry sources to current consumer trends to help understand the impact they are having on business outcomes such as visits and sales. GroundTruth data is sourced from the 30 billion annual global visits observed on its platform. All data is anonymized and aggregated.




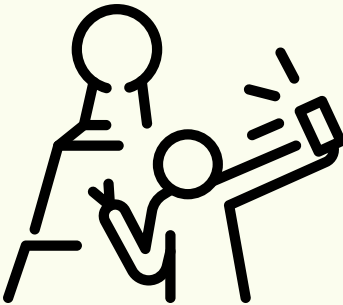
The Lean: Travel Insights Brief Highlights

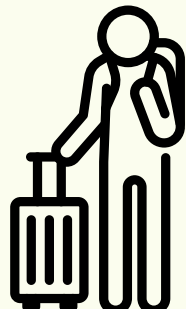
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1 The travel industry moves towards recovery
Pent-up demand for travel generated a strong increase in air-related travel and hotel stays in July.
- 2 Ground travel stalls out**
A rise in gas prices and car rental shortages negatively impacted the drive market.


- 3 Venturing to the great outdoors**
Americans searched for national parks more than any other travel destination during May and June¹.


- 4 Limited international travel fuels domestic tourism**
Domestic tourist locations boomed this summer, especially outdoor entertainment centers.


- 5 Leisure travel beats business travel**
Less companies require work-related travel, so the majority of travelers were hobby and leisure seekers.





1 Share This

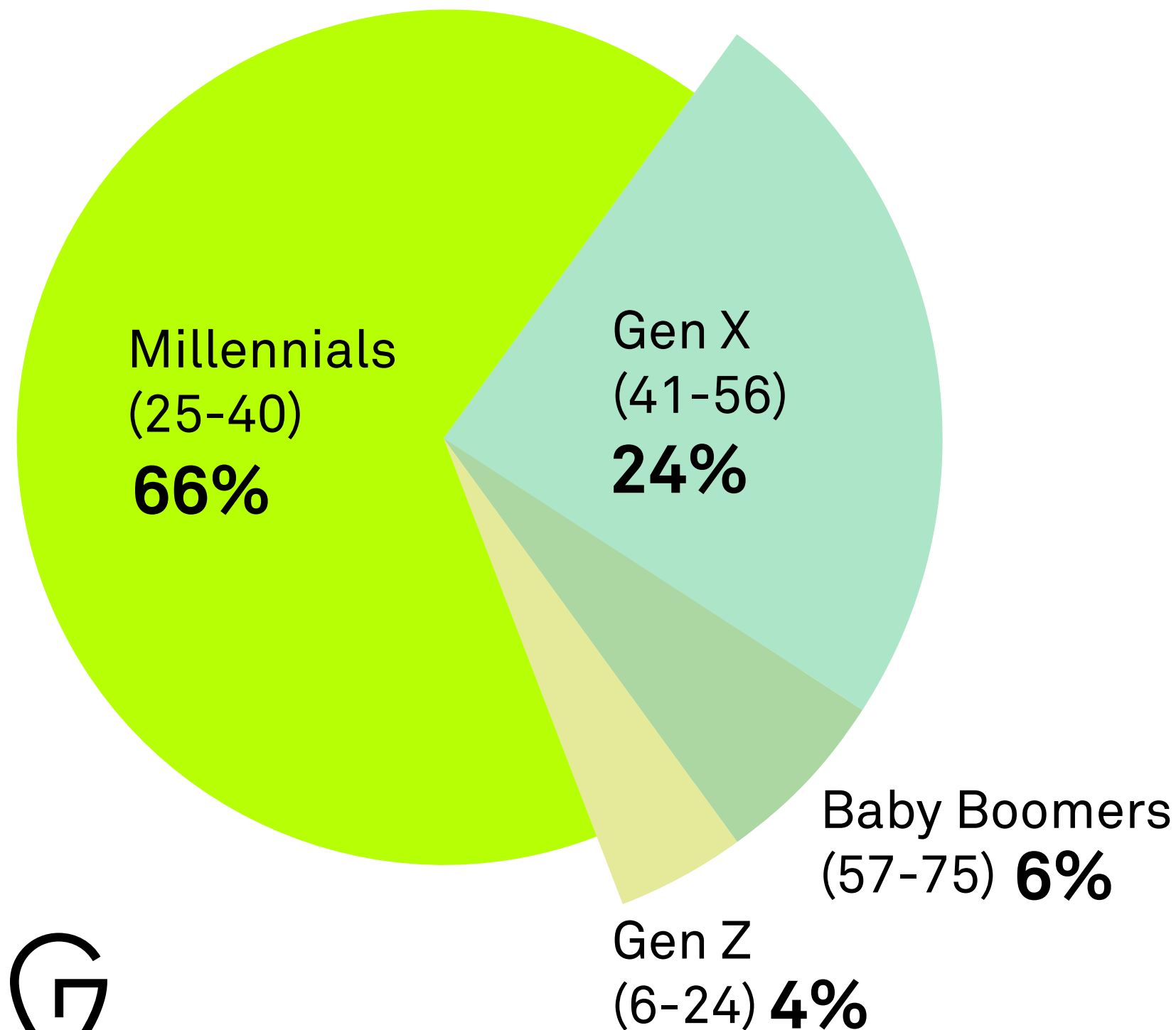
At a Glance: Audience Insights

Millennials and Leisure Travelers are taking trips in droves.

Leisure Travelers > Business Travelers

Business travel spending fell 70% compared to 27% for leisure travel*, aligning with foot traffic behaviors from location-based audiences

Age Distribution of Travelers

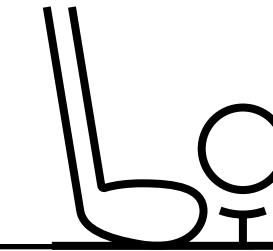


Top Travel Audiences

Arts Lovers	1
Spa Enthusiasts	1
Recently Moved	2
Car Renters	
Golfers	1

1

People are willing to get out and travel if it means they are able to embrace the important things in life, such as their art, spa and golf hobbies.



1

Arts Lovers

1

Spa Enthusiasts

2

Recently Moved



2

With more flexible work-from-home arrangements, many are exploring new places to live and work that are not within commuting distance to the office

1

Golfers

Car Renters



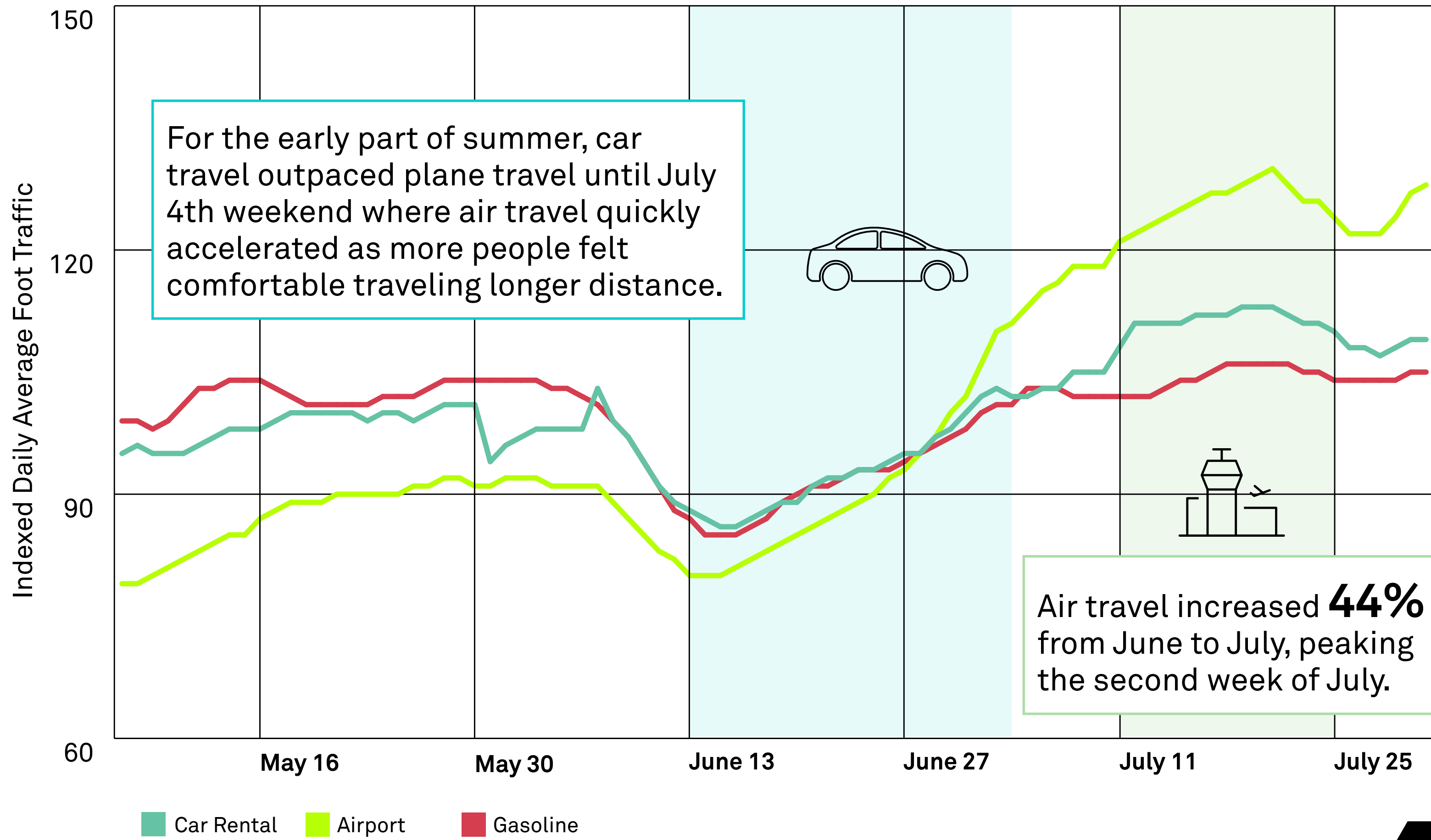
* Tourism Economics, Jan 2021



Summer Travel Foot Traffic Snapshot

By early July, travel starts to accelerate quickly as people took more car and plane trips.

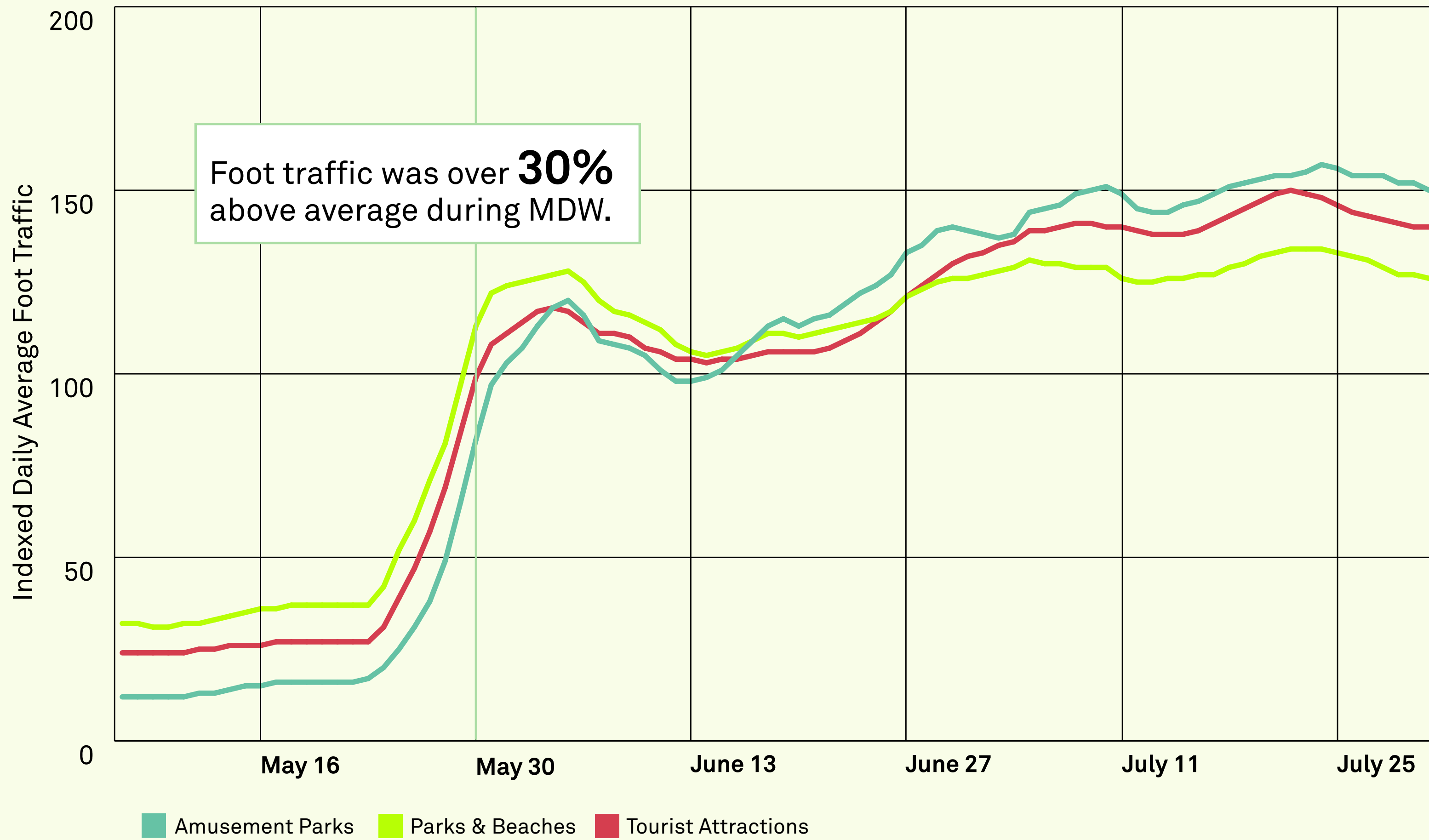
Car vs. Air Travel



Summer Tourism Foot Traffic Snapshot

Memorial Day Weekend was the unofficial start of summer and the official start of fun.

Tourism Category Foot Traffic



Top 3 Visited Amusement Parks

1. Disney Parks
2. Cedar Point
3. Six Flags

Top 3 Visited National Parks

1. Acadia National Park
2. Yellowstone National Park
3. Grand Canyon National Park

Top 3 Visited Tourist Attractions

1. Niagara Falls
2. Atlantic City Boardwalk & Casino
3. Washington DC: National Mall & Memorial Parks



Hotels Spotlight

There was a steady increase in hotel stays from mid-June that accelerated with the onset of July, specifically in the Luxury Hotels category.

Increases in Hotel Categories from June to July

Luxury Hotels

+45%



Economy

+44%



Extended Stay

+40%

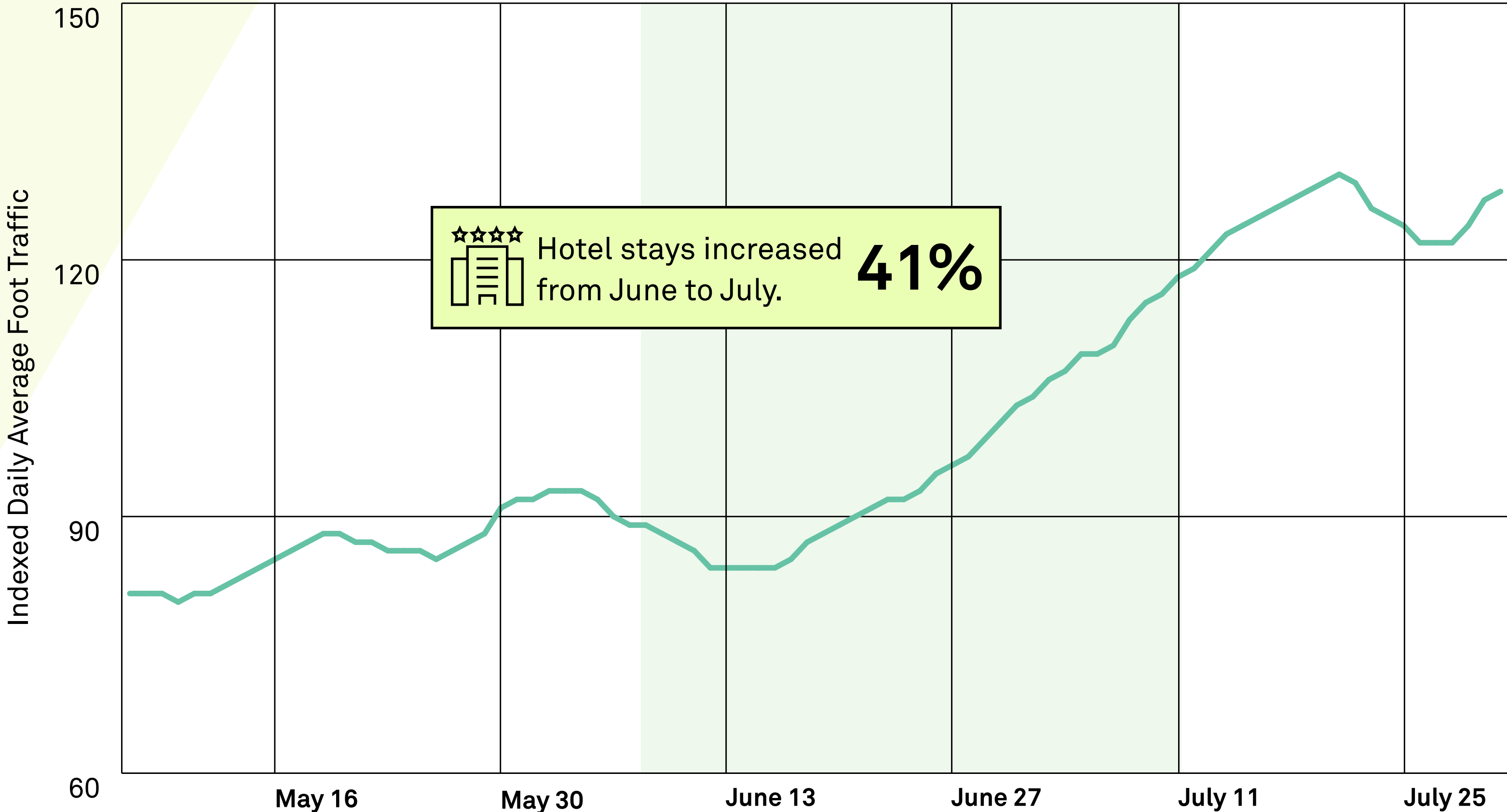


Mid-Tier

+36%



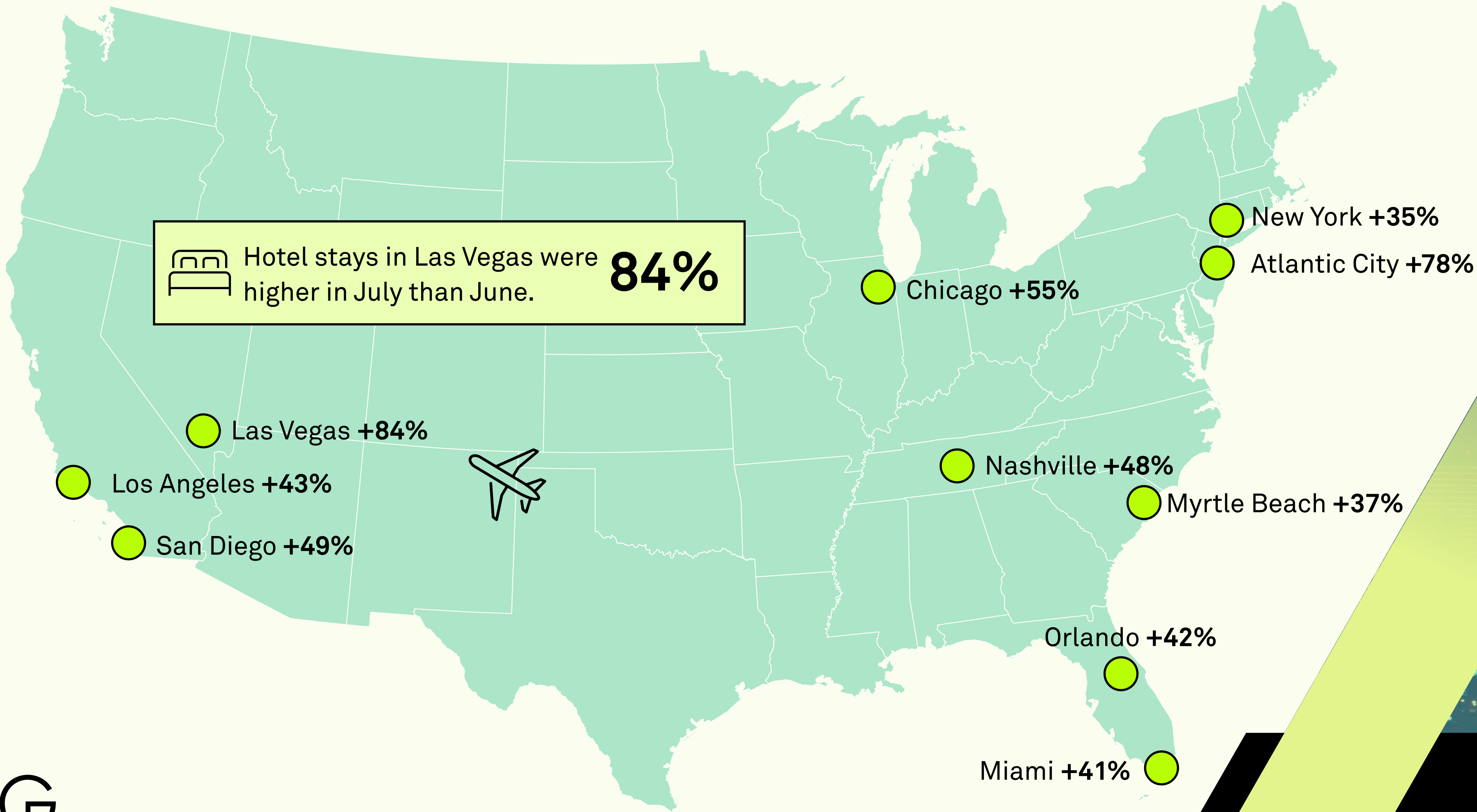
Hotel Foot Traffic



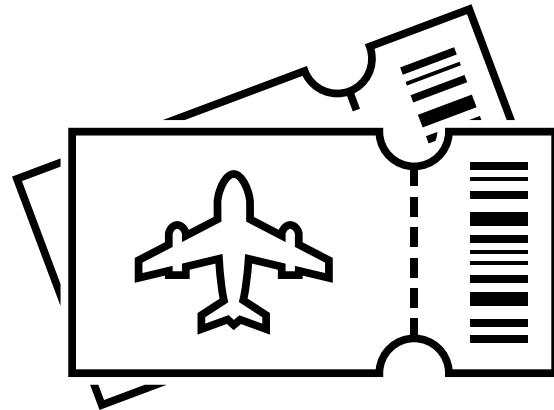
Top Travel Destinations

Las Vegas, Atlantic City and Chicago top the list for trending cities for tourism this summer.

Increases in Hotel Visits from June to July, 2021



Pandemic-Driven Trend: Last Minute Bookings & Flexible Cancellations

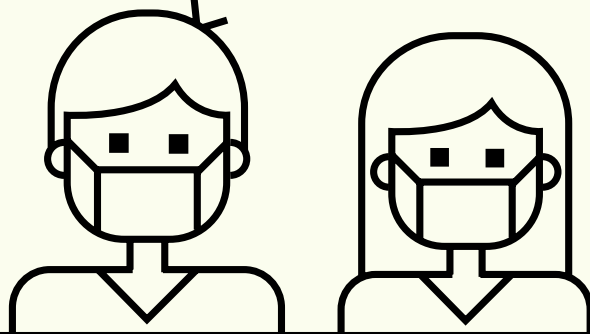


50%

of people agree they are booking trips more last minute due to uncertainty from the pandemic¹.

44%

have canceled trips due to recent COVID-19 changes².

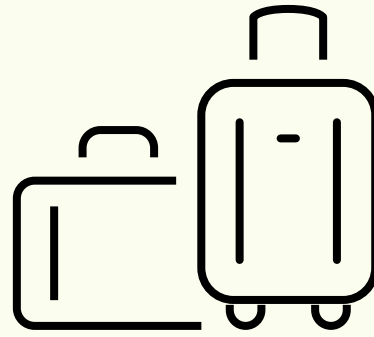


1 Statista
2 First Insight

Looking Forward

Sustaining travel momentum through the holidays

A strong summer travel season and pandemic concerns could impact this year's holiday travel trajectory as consumers look to recover from summer spending and avoid potential health risks. For travel marketers, it will be important to maintain consumer engagement leading up to the holiday season to help fuel the much-needed reboot on consumer travel. Brand awareness campaigns that remind consumers about the importance of unplugging and spending time with family can keep brands top of mind and help drive travel interest.



1

Adapting marketing strategies to reflect evolved consumer lifestyles

With many Americans working remotely, moving to different parts of the country, and changing their daily routines over the last year, finding and engaging consumers at relevant moments is becoming increasingly complicated for marketers. Using audience segments based on offline behavior and demographic data can help ensure marketers' targeting strategies are reaching consumers who are interested in their travel segment(s).



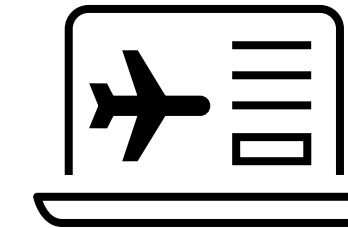
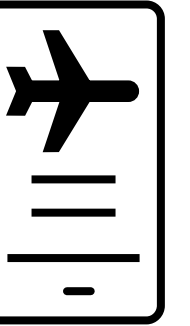
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Reaching last-minute bookers

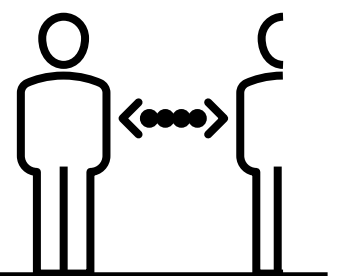
Consumers continue to face pandemic-related uncertainty every day, fueling last-minute travel bookings. This growing segment of consumers creates extended lines of revenue during travel seasons. To make the most of marketing dollars, brands can engage last-minute bookers with affordable and flexible getaway packages.



3

Building trust during the pandemic

As the spread of the Delta variant continues to be a major concern, it's more important than ever for travel marketers to make health and safety messages a part of their branding campaigns. As opportunities to travel safely arise, consumers will be more likely to choose travel companies that align with their values and that supported them through a time of ambiguity.





Questions?

Contact us: marketinginsights@groundtruth.com

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