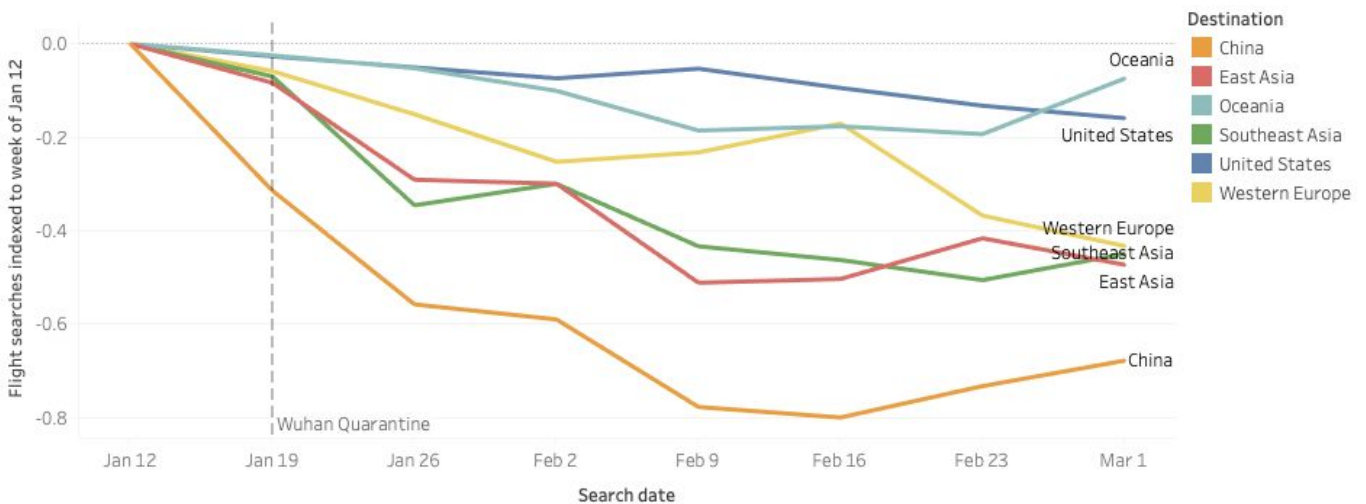


COVID-19

Data and Insights on Travel Impact

With our access to real-time traveler audiences and unmatched visibility into global travel demand, we're in a unique position to share the current travel trends at the forefront of marketers' minds. In this series we take a look at the data in order to aid travel marketers in their assessment COVID-19. They can use these trends to inform their marketing strategies during this period and be prepared for the recovery once the situation stabilizes. The trends we've observed so far include: **travel intent varying by region, lead time increasing in North America and Asia, and U.S. domestic patterns shifting.** For a deeper understanding of these trends read more:

YoY Change in Weekly Flight Search



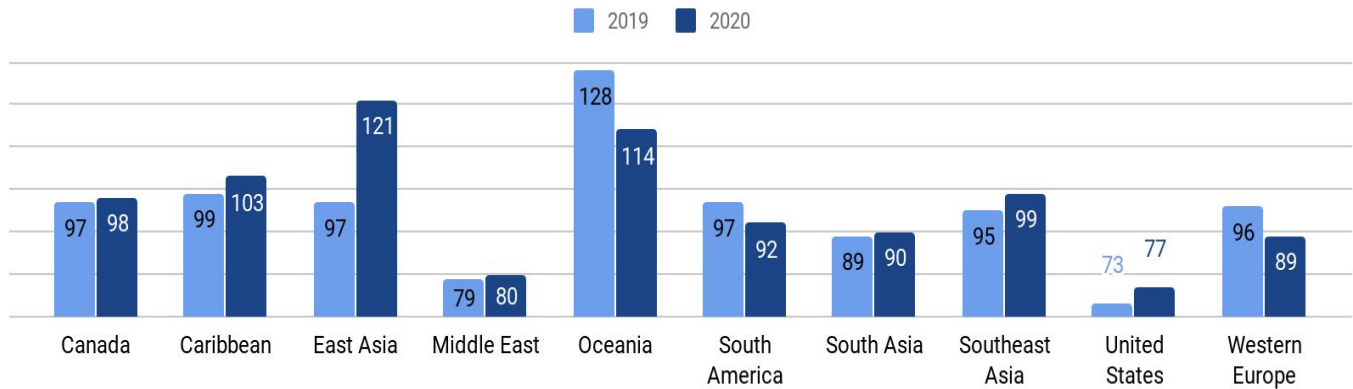
Source: Sojern Flight (Airline/OTA/Meta) Data, Flight searches Jan 12–Mar 7, 2020 vs Jan 13–Mar 9, 2019

Searches to East and Southeast Asian countries had been deeply impacted by late January. Western Europe followed the same trend when the outbreak in Italy grew. Travel to the U.S. and domestically has shown the most stability so far. Australia and New Zealand have been resilient, even experiencing a significant uptick within the last week (February 23rd to March 1st).

COVID-19

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Regional Lead Time

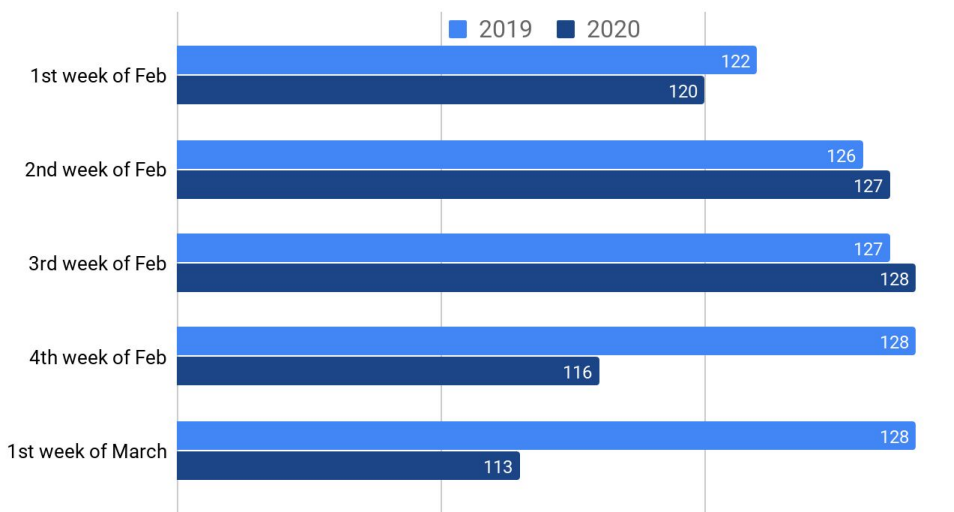


Source: Sojern Flight (Airline/OTA/Meta) Data, Flight searches Jan 12–Mar 7, 2020 vs Jan 13–Mar 9, 2019

Travelers continue to show travel intent. They may not be booking as quickly but they're looking towards future travel, with increased interest later in the year.

Only Oceania (Australia/NZ) and Western Europe are showing shorter lead times as seen below.

Oceania Lead Time

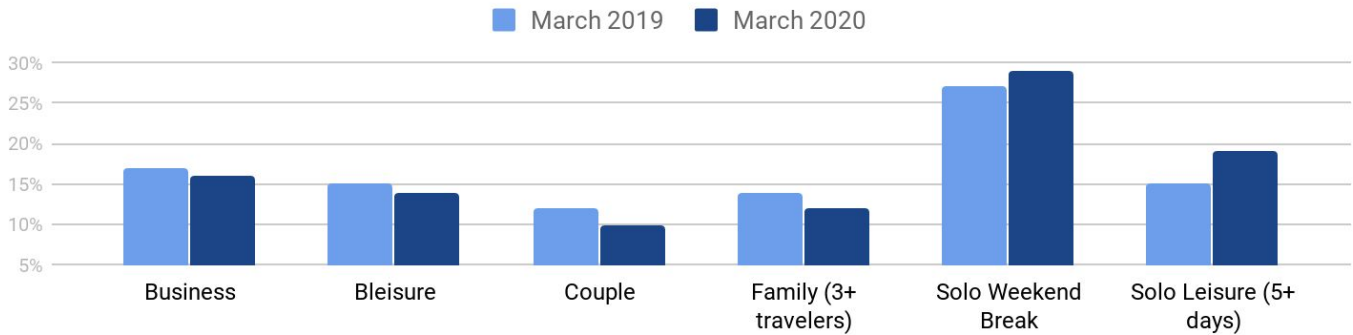


Source: Sojern Flight (Airline/OTA/Meta) Data, Flight searches Jan 12–Mar 7, 2020 vs Jan 13–Mar 9, 2019

A trend with Australia's lead time demonstrates the effectiveness of a destination tourism campaign. The first week of the campaign corresponded with a 12 day reduction in lead time, while the second week of the campaign corresponded with a 15 day reduction.

Data and Insights on Travel Impact

U.S. Traveler Composition



Source: Sojern Flight (Airline/OTA/Meta) Data, Flight searches Mar 1-7, 2020 vs Mar 3-9, 2019

Primary travel intent is shifting towards leisure travel in today's uncertain business climate. Additionally, among leisure travelers, the demand for travel in the U.S. has shifted away from couples and families. Solo travelers for weekend and 5+ day leisure trips have even increased.

There is no doubt that marketers around the world will have to adjust their marketing strategies over the coming months. We'll continue to share more insights as we monitor the situation and provide recommendations.



Sojern's digital marketing solutions for travel are built on more than a decade of expertise analyzing the complete traveler path to purchase. The company drives travelers from dream to destination by activating multi-channel branding and performance solutions on the Sojern Traveler Platform for more than 10,000 customers around the world. Recognized as a Deloitte Technology Fast 500 company six years in a row, Sojern is headquartered in San Francisco, with 600 employees based in Berlin, Dubai, Dublin, Hong Kong, Istanbul, London, Mexico City, New York, Omaha, Paris, São Paulo, Singapore and Sydney.