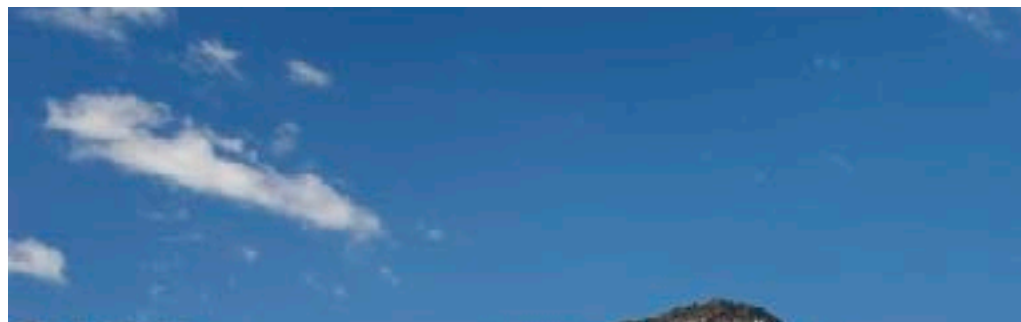


COVID-19  
TOURISM  
REBOUND:  
*MEDIA INSIGHTS & TRENDS*



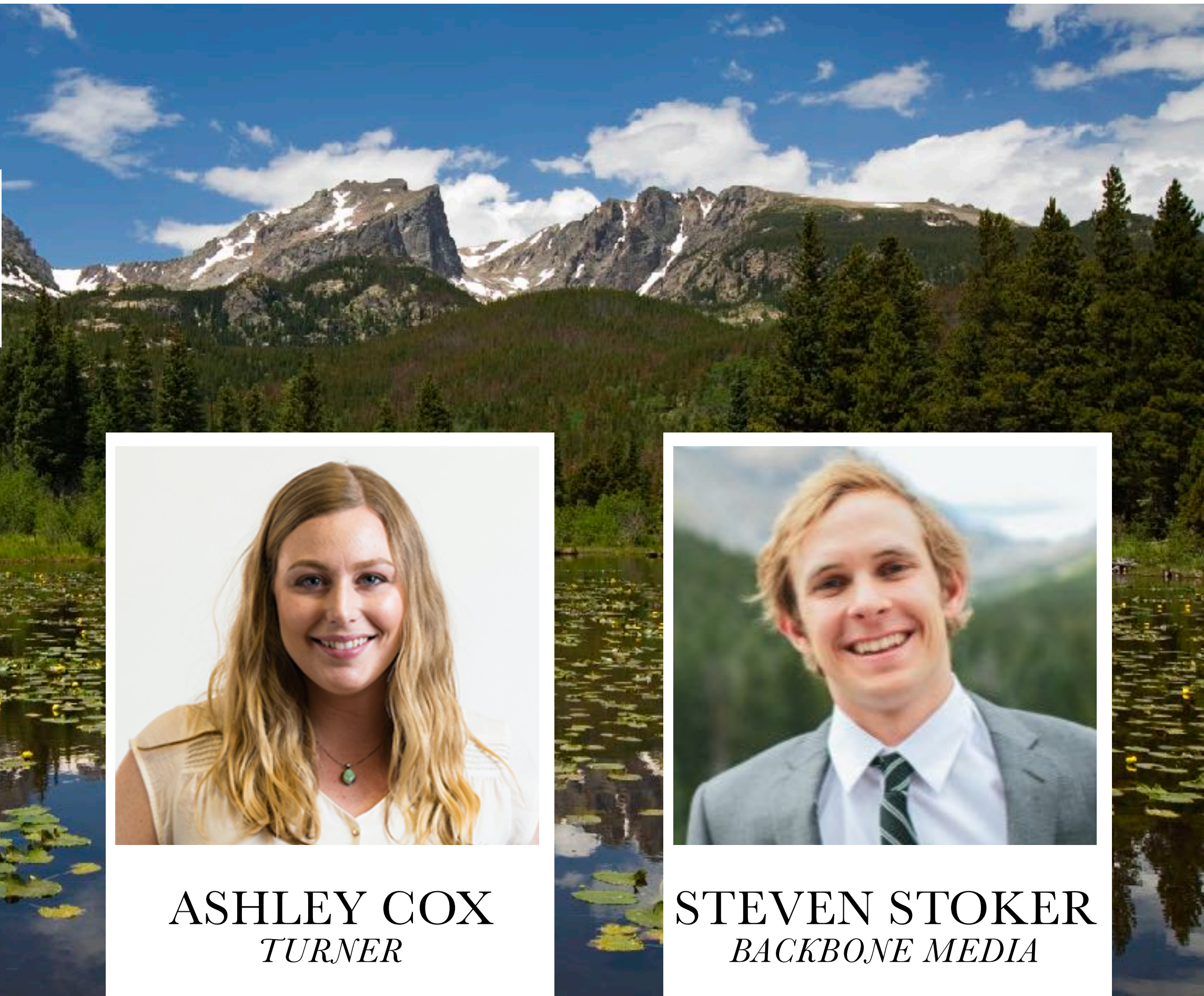




# PRESENTERS



**JOSH HARMS**  
*VISIT ESTES PARK*



**ASHLEY COX**  
*TURNER*



**STEVEN STOKER**  
*BACKBONE MEDIA*





# STATE OF THE TRAVEL INDUSTRY

# FLATTENING THE (CANCELLATION) CURVE

WHILE IT'S IMPOSSIBLE TO KNOW THE FULL IMPACTS COVID-19 WILL HAVE ON TOURISM, WE ARE STARTING TO SEE TRAVELER SENTIMENT IMPROVE ON THE POSSIBILITY OF TAKING A TRIP THIS SUMMER OR BOOKING FOR LATER IN THE YEAR. THIS BEHAVIOR CHANGE IS A CRITICAL PERIOD FOR DESTINATIONS TO DEVELOP REBOUND MESSAGING, PUT HEALTH PROTOCOLS IN PLACE AND CONSIDER REOPENING INCENTIVES.

## 82%

of travelers will change their plans in the next six months

## 57%

of travelers would go on an overnight trip within the next three months with assurances it's safe

## 47%

of travelers are likely to travel by car with a similar number stating they will stick to destinations close to home

Google Trends

Interest over time ?



● Travel Topic





# COVID-19 REBOUND: PREDICTED PHASES



States Begin to Reopen

Travelers Consider Long Weekend Trips

Drivable Destinations

Social Distancing Still in Practice

Adjustment to New Norm:  
Heightened Health Screenings



Regional & Direct Flight Market  
Travel Considered

Domestic Destinations Only

Travel Confidence Begins to Return

Long-Lead Bucket List Trip Planning



International Travel Returns

Longer Trips Considered



# A TURN FOR THE BETTER: NATIONWIDE

## ROAD TRAVEL SLOWLY RISES NATIONWIDE

ARRIVALIST GPS DATA SHOWS POSITIVE  
WEEK-OVER-WEEK CHANGES

### Arrivalist US Daily Travel Index

Daily Travel Index

- 46.0%

June 1, 2020, Monday

Day of Week Change

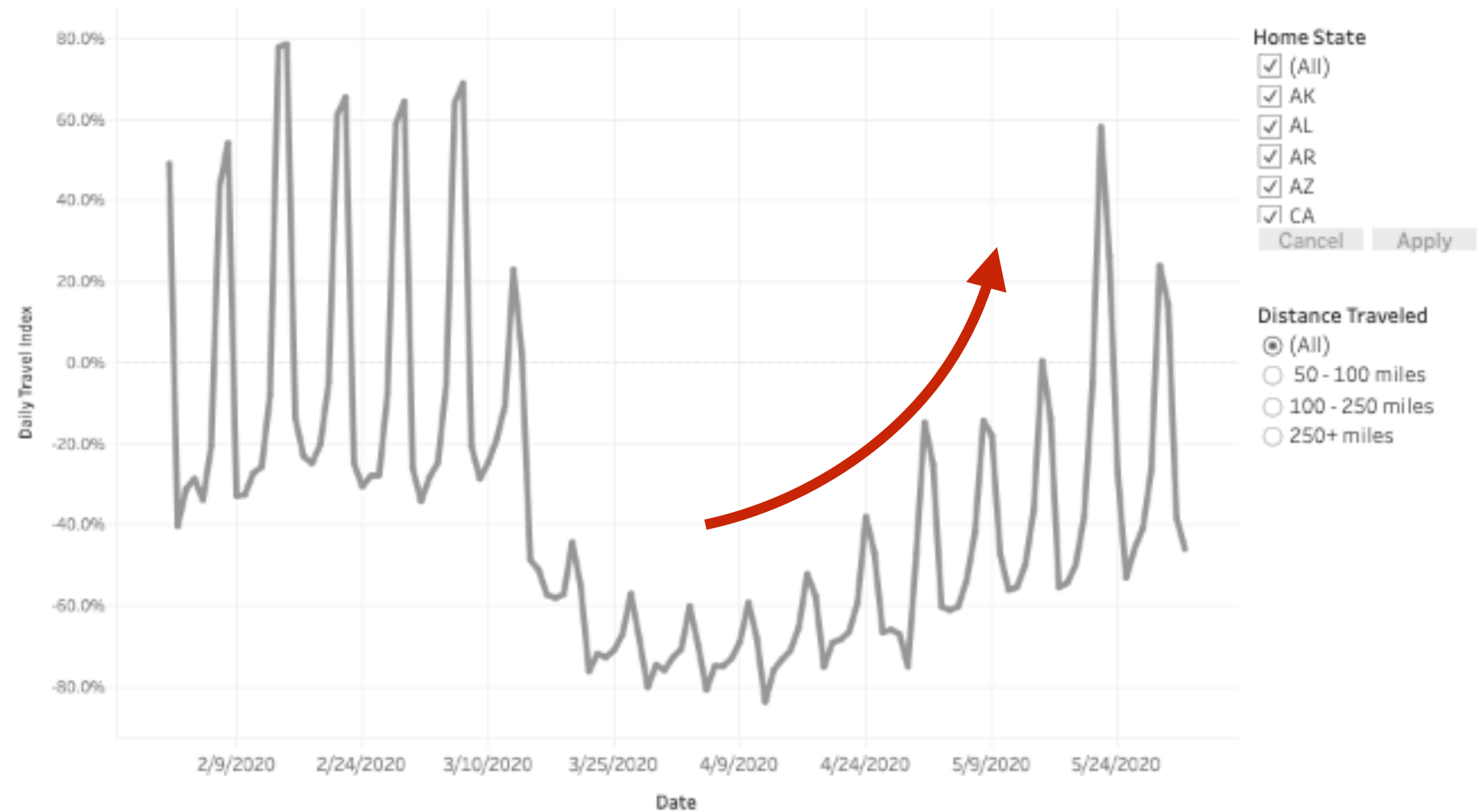
+ 7.2%

Monday vs Prior Monday

Week over Week Change

- 10.1%

Last 7 Days vs Prior 7 Days



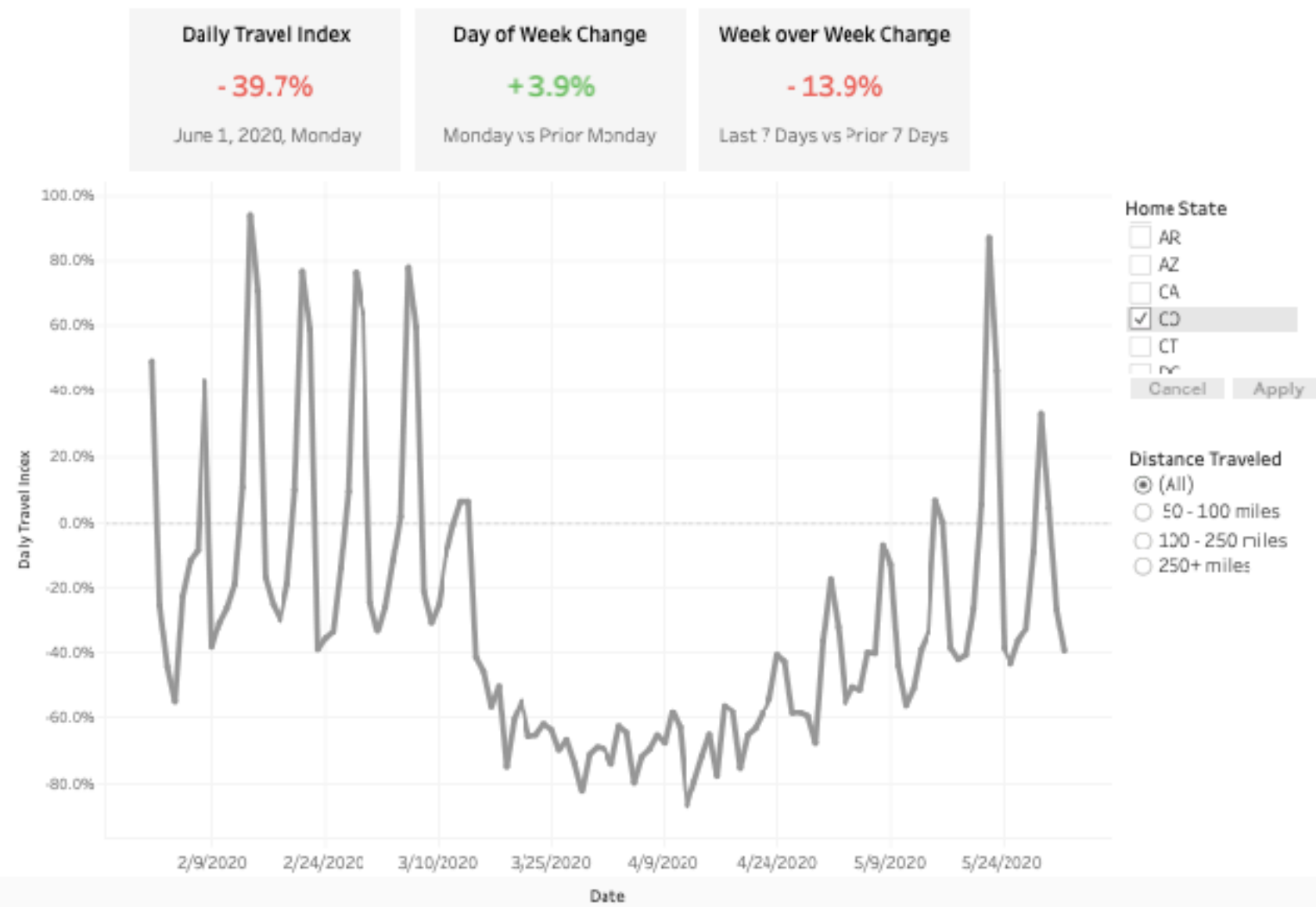


# A TURN FOR THE BETTER: COLORADO

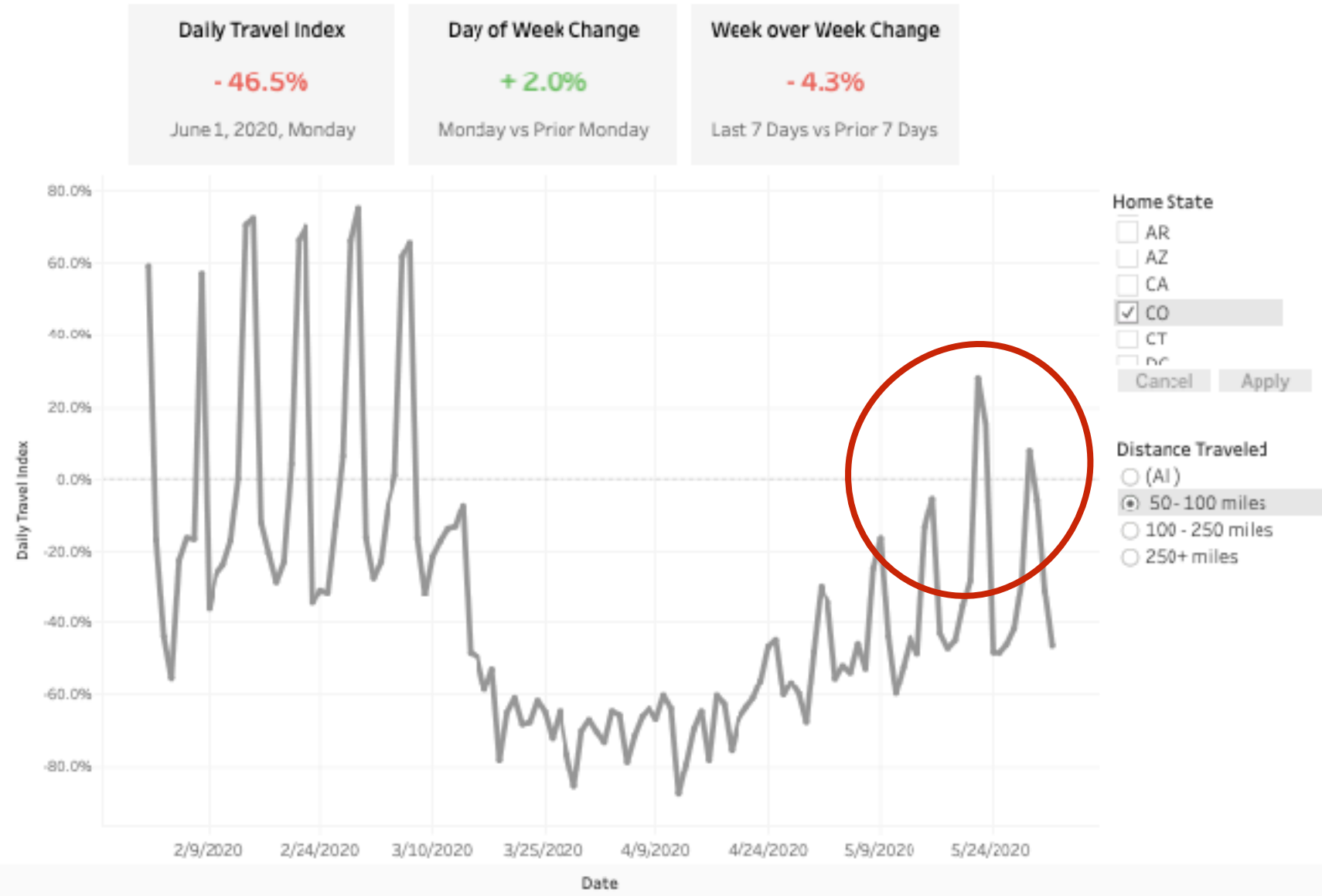


**COLORADO**  
BIGGEST WEEK-OVER-WEEK GAIN IS  
FROM THOSE TRAVELING 50-100 MILES

Arrivalist US Daily Travel Index



Arrivalist US Daily Travel Index



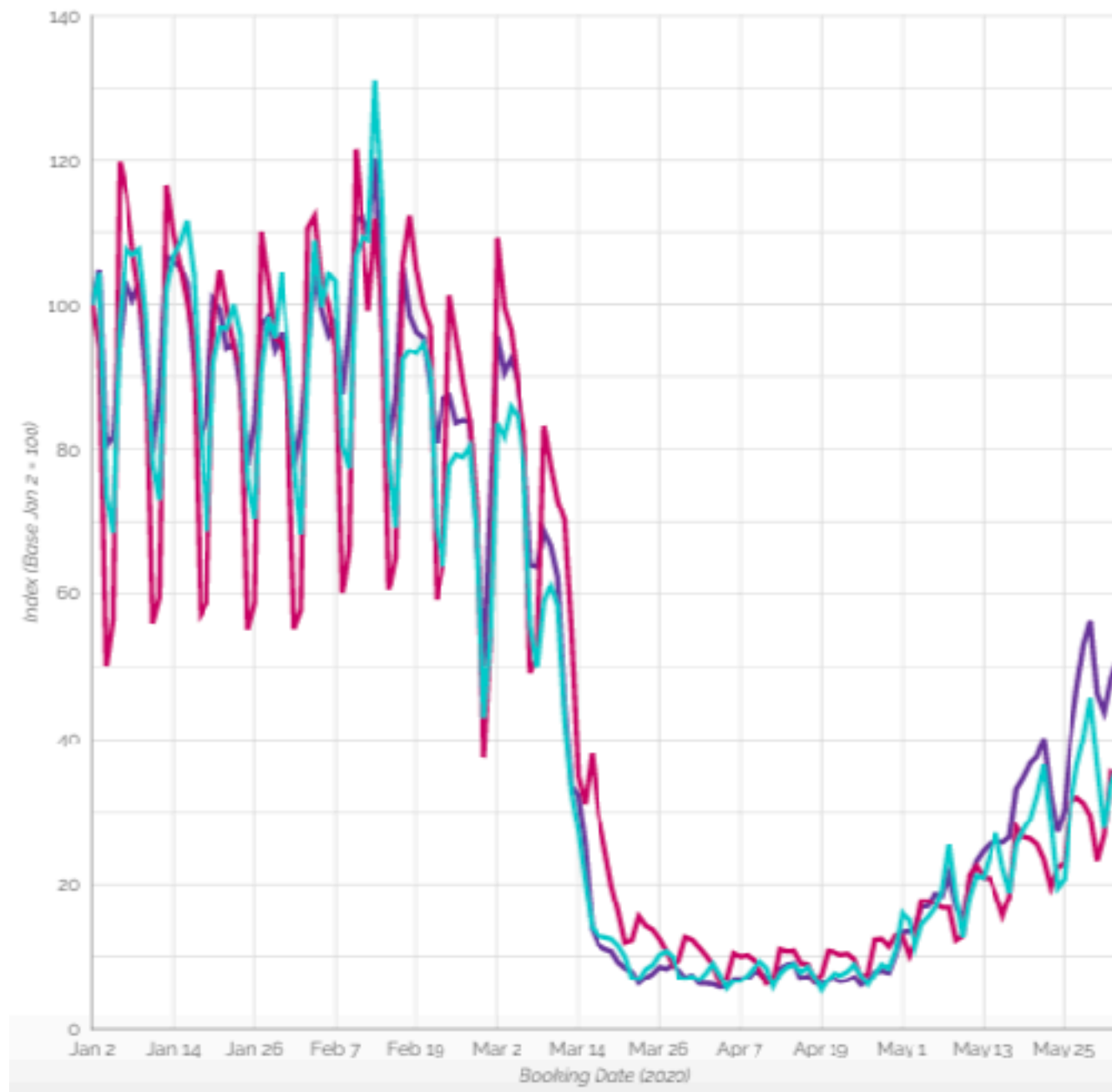


# VOLUME OF US DOMESTIC TRIPS: HOTELS & FLIGHTS

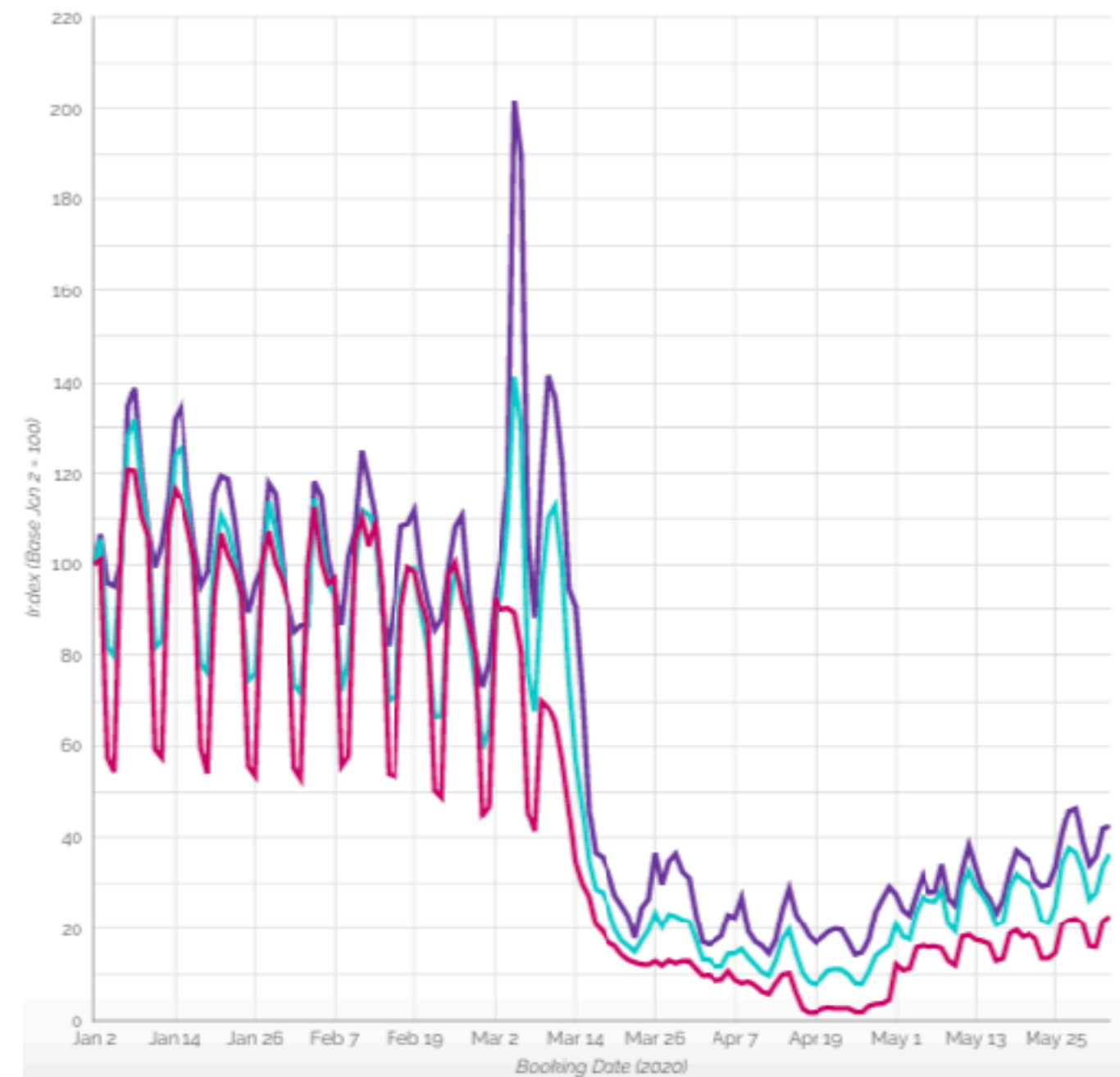
**HOTEL & FLIGHT BOOKINGS ARE STARTING TO RISE**

Leisure - Family Leisure - Non-Family Business

HOTEL VOLUME BY PURPOSE



FLIGHT VOLUME BY PURPOSE



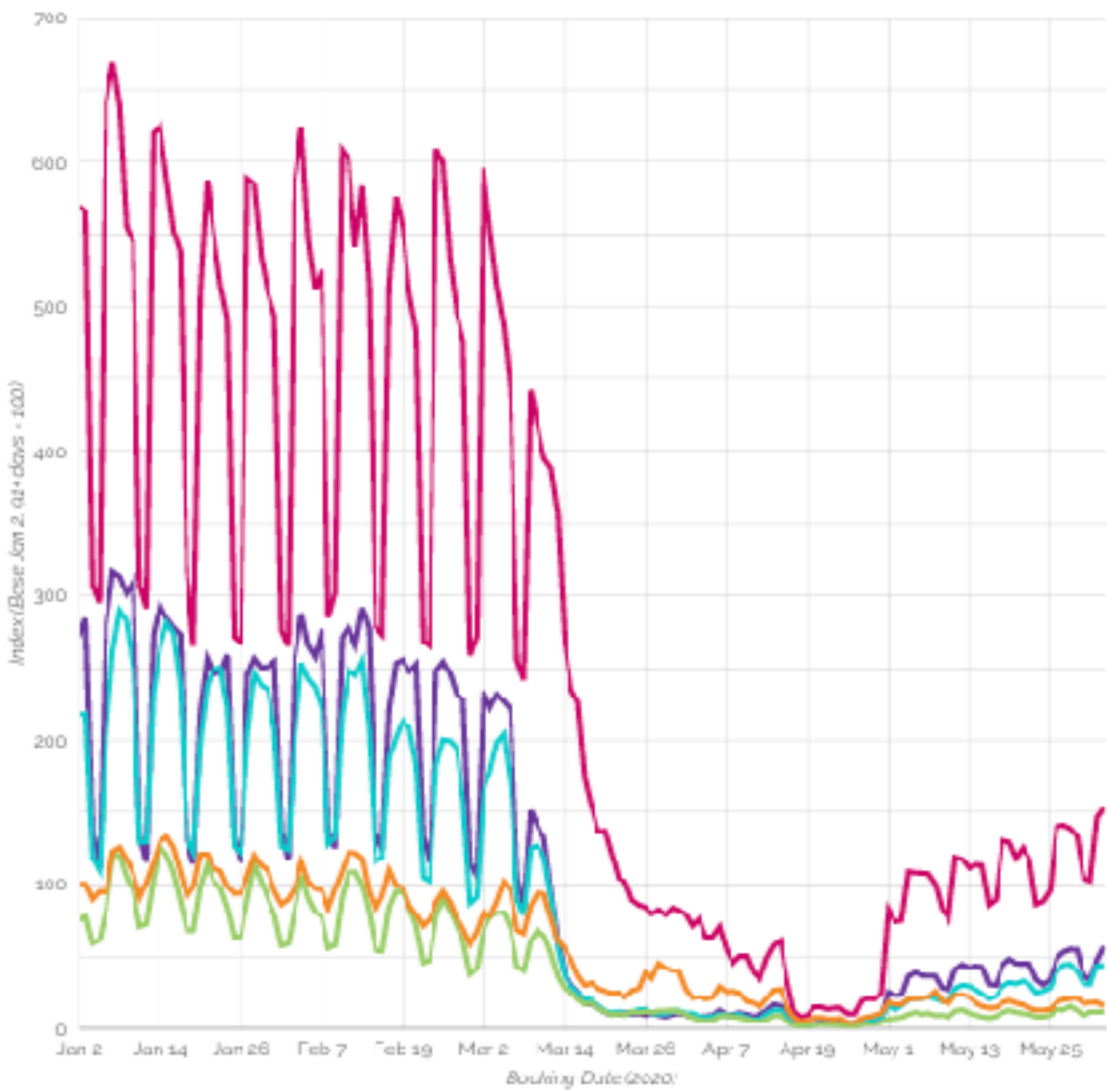


# FLIGHT BOOKING LEAD TIME: BY TYPE

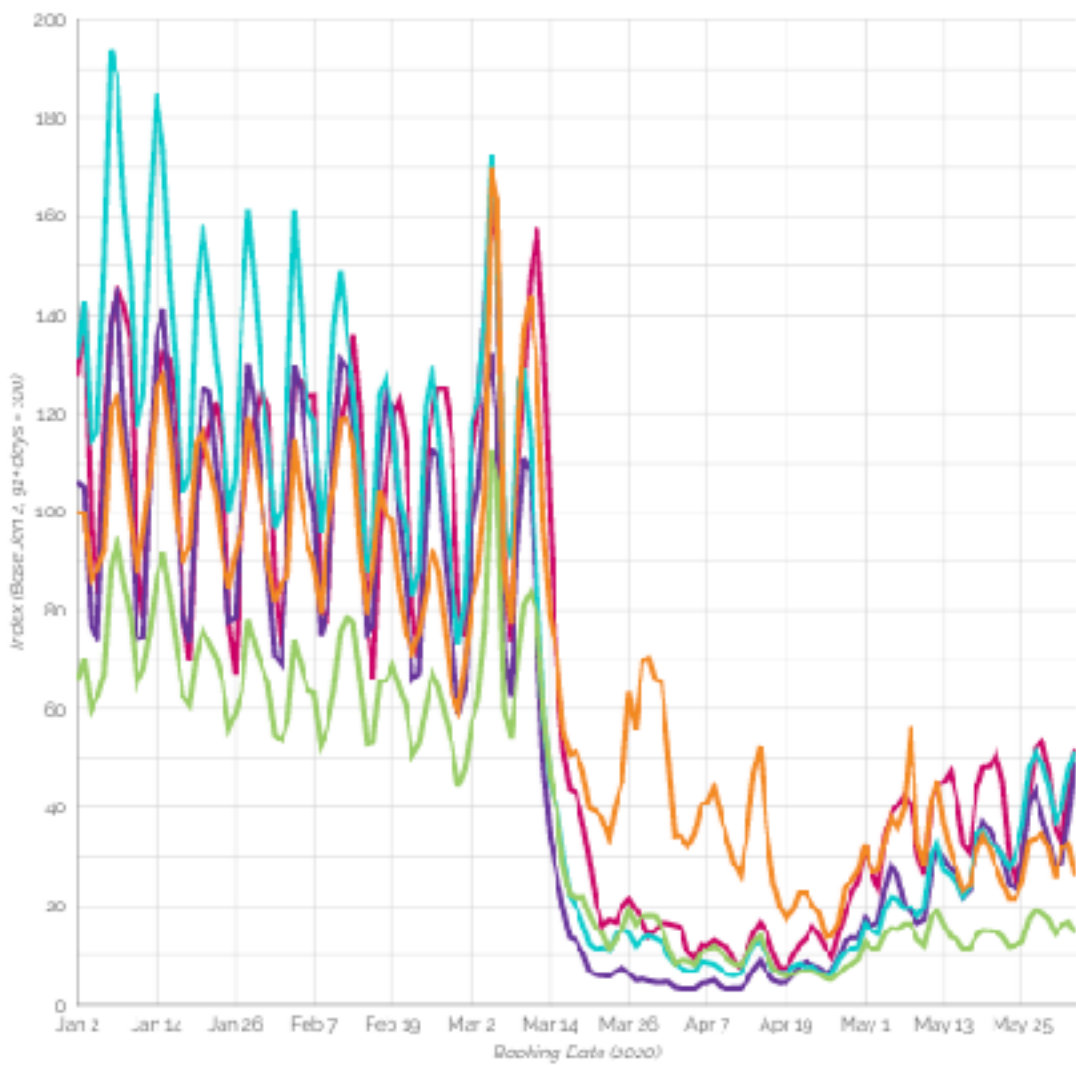
**SPIKE IN 0-15 DAYS BUSINESS BOOKINGS;  
SOLO TRAVEL & COUPLES AT 0-60 DAYS;  
FAMILY TRAVEL AT 31-60 DAYS**



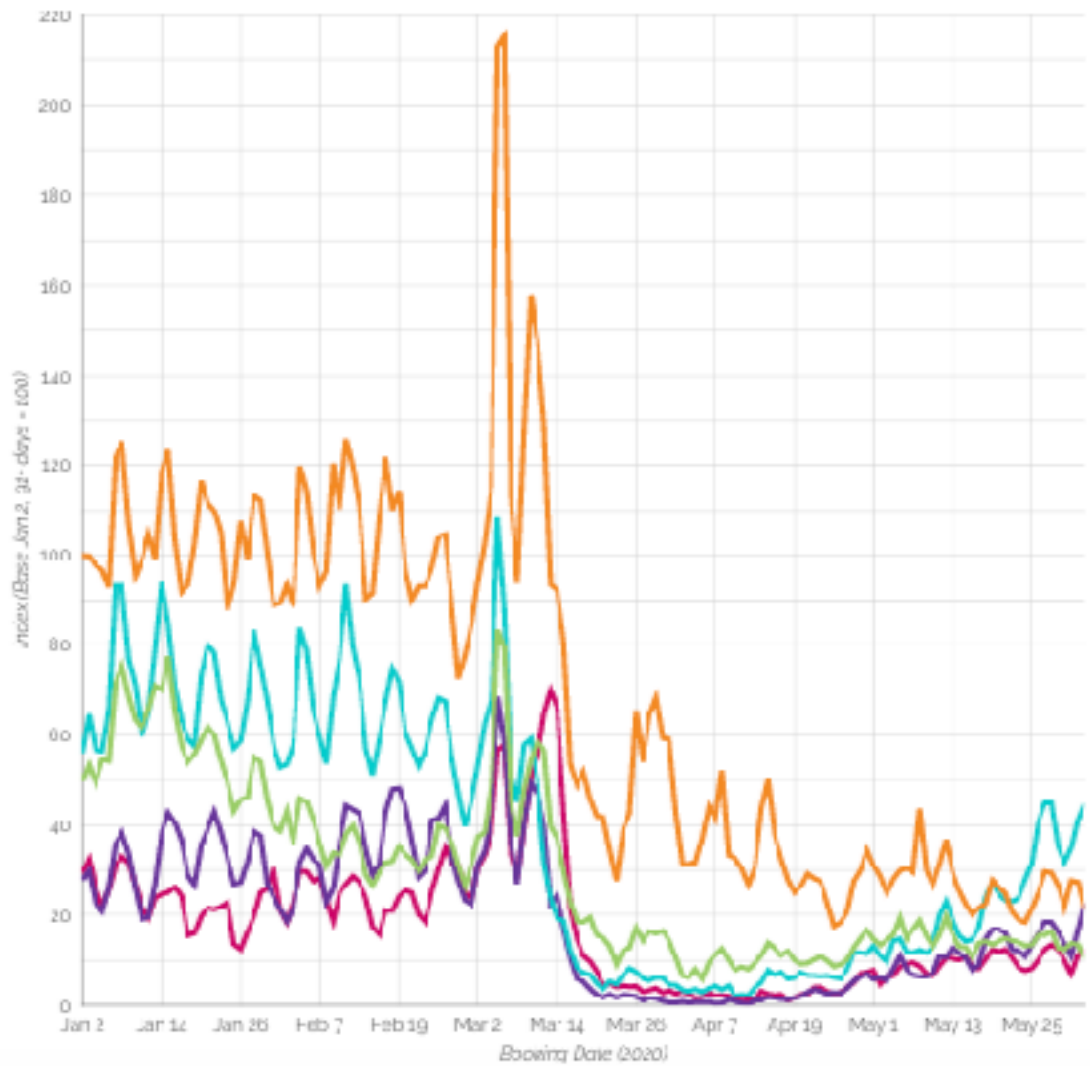
TRIP PURPOSE: BUSINESS



TRIP PURPOSE: LEISURE – SOLO TRAVELERS & COUPLES



TRIP PURPOSE: LEISURE – FAMILY







# MEDIA INSIGHTS



## THE NOT-SO-GOOD

### FOLDED PUBLICATIONS

Among the media casualties are many in-flight print magazines (though digital may live on), Tripadvisor brands (Jetsetter, SmarterTravel) and hotel review site Oyster.com.

### MAJOR CUTS

Others have taken drastic measures to weather the storm such as reduced staff at Culture Trip, F&B team layoffs at Thrillist and elimination of travel section in LA Times (folding 1-2 pages into Saturday paper).

## THE GOOD

### NEW SECTIONS

There have been a number of new sections such as The Essentialist "Voices of Travel" series, The New York Times reader-generated "36 hours" travel itinerary, CNN's "The Good Stuff" and E.W. Scripps company-wide (local TV & national brands) "The Rebound."

### NEW OUTLETS & BEATS

Typically with a mass die-off of publications, as seen in the previous recession, new ones take form from laid-off editors. We're already seeing some of this with Meredith's launch of Sweet July, a new food and lifestyle glossy magazine. Freelancers are also diversifying their beats, incorporating travel content in other sections such as health and real estate.

# MEDIA UPDATES: MARKETING



- WITH A LONG PAUSE FROM MANY BRANDS IN ADVERTISING WE ARE SEEING DISCOUNTED RATES ACROSS MOST DIRECT PUBLISHERS, ESPECIALLY IN THE TRAVEL SPACE
  - LOCAL PUBLISHERS SUCH AS ELEVATION OUTDOORS OFFERING BUY ONE – GET ONE PRINT PAGES
  - NYT TRAVEL OFFERING UP TO 60% DISCOUNTS
- WITH LESS COMMUTING/IMPRESSIONS WE ARE SEEING SIGNIFICANTLY DISCOUNTED OOO RATES
- PLATFORM USAGE IS ALSO SIGNIFICANTLY UP WITH INCREASED USAGE IN CONNECTED TV, YOUTUBE, PINTEREST AND SOCIAL (FACEBOOK/IG)
- MANY BRANDS IN THE OUTDOOR SPACE ARE PARTICIPATING IN A FACEBOOK/INSTAGRAM BOYCOTT





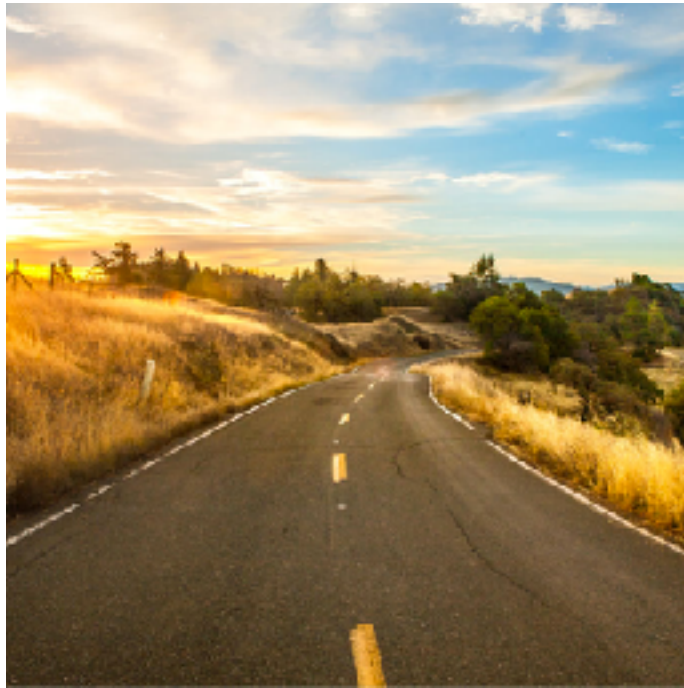


# POST COVID-19 TRAVEL TRENDS

ESTES PARK



# TRENDS: BUILT-IN SOCIAL DISTANCING



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## ROAD TRIPS

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- Rise of RV Travel
- Affordability
- Close-By Destinations
- AirBnBs / Standalone / Boutique Lodging

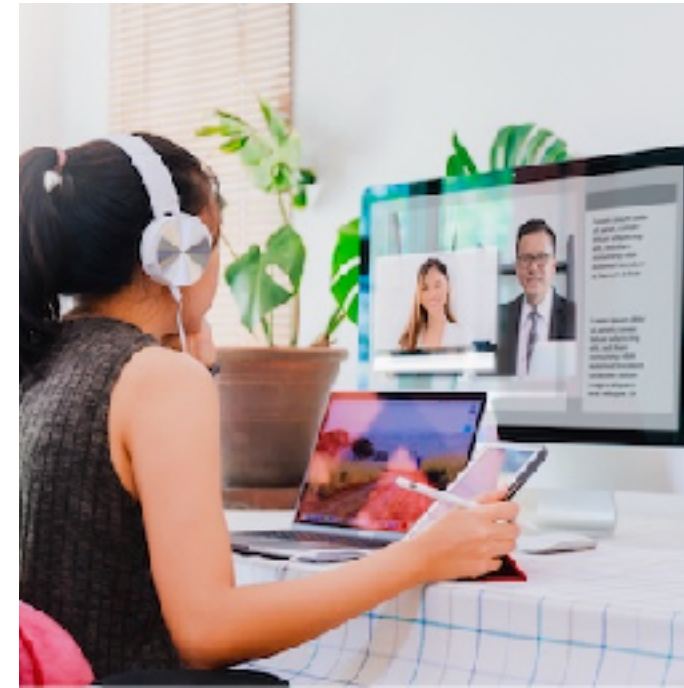


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## ESCAPISM

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- Smaller Towns / Lesser Known Locales
- Unplug, Unwind
- Drive-In Movies Moment



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## REMOTE (OFFICE) LOCATIONS

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- Brag-Worthy WFH Backdrops
- Digital Nomads
- Work + Leisure Trips



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## OUTDOOR ADVENTURE

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- Camping
- Recreational Activities
- Permitted & Timed Entrances





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## HEALTH & WELLNESS

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- Touchless Technology
- Hospitality + Health Brand Collaborations
- Face Mask & Sanitization Travel Protocols
- Cognitive & Mental Health Programs
- On-Demand Fitness Programs



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## SUSTAINABILITY

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- Carbon Footprint Offsetting
- E-road trips
- Eco-Friendly Food
- Wildlife Conservation



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## EXTENDED FAMILY

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- Pet Travel
- Travel "Spouses"
- Gramping



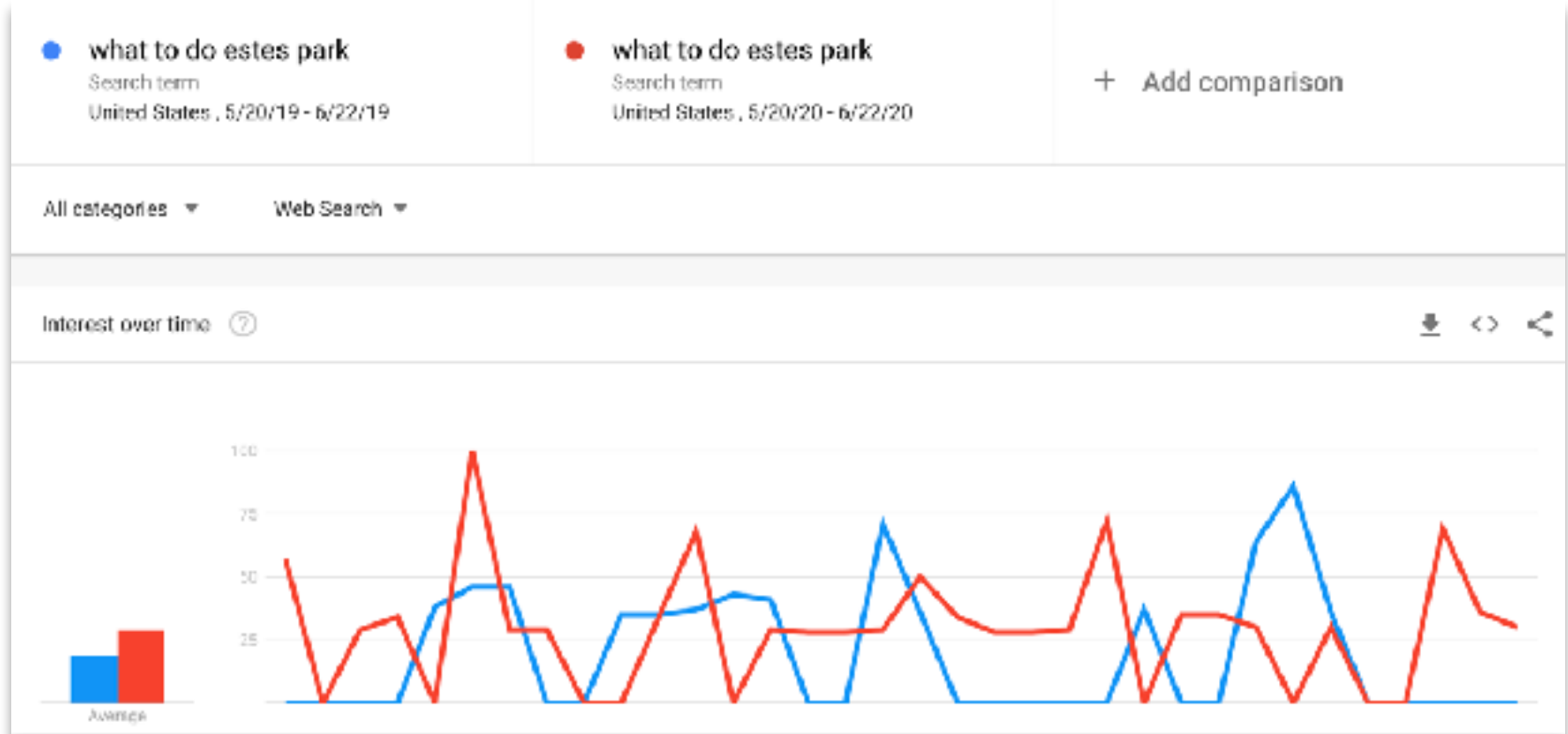
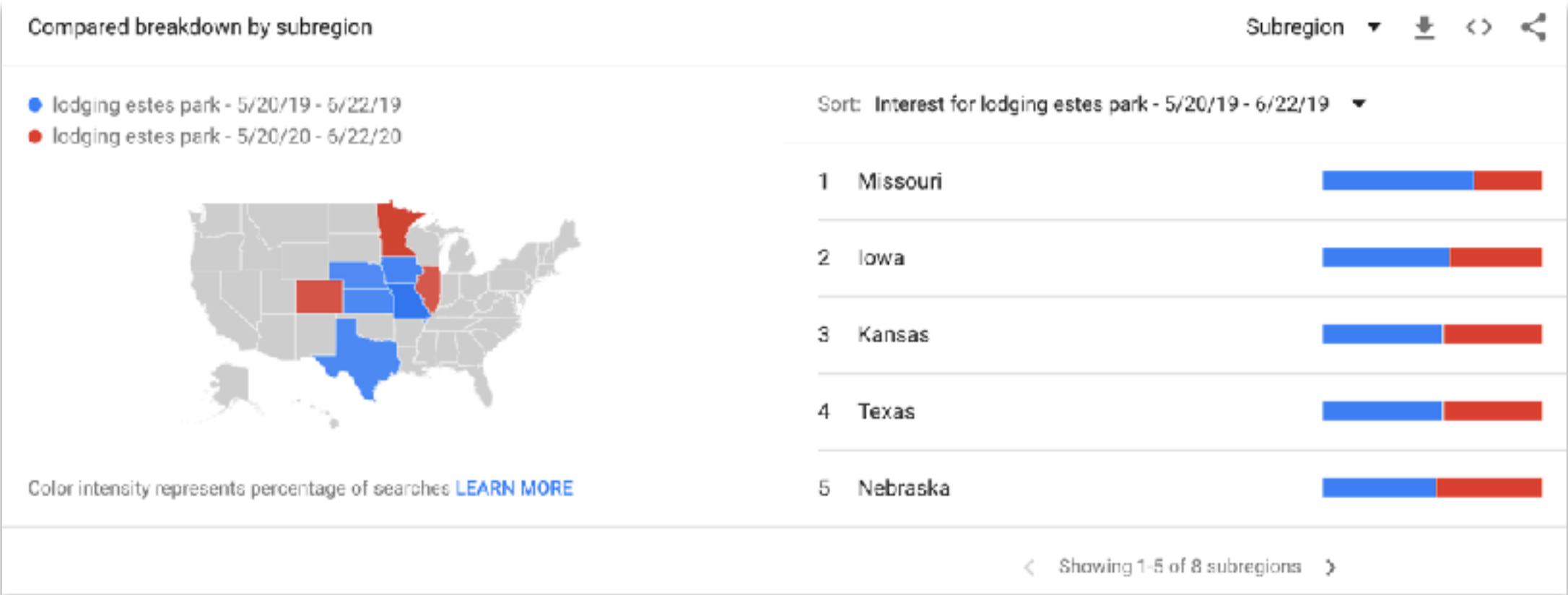
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## HOBBYIST COMEBACK

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- Literary Movement
- DIY Crafts & Skills
- Cooking & Gardening
- Journaling & Lettering

# LOCAL SEARCH TRENDS







# MARKETING OUTLOOK



# INCREASE IN OUTDOOR

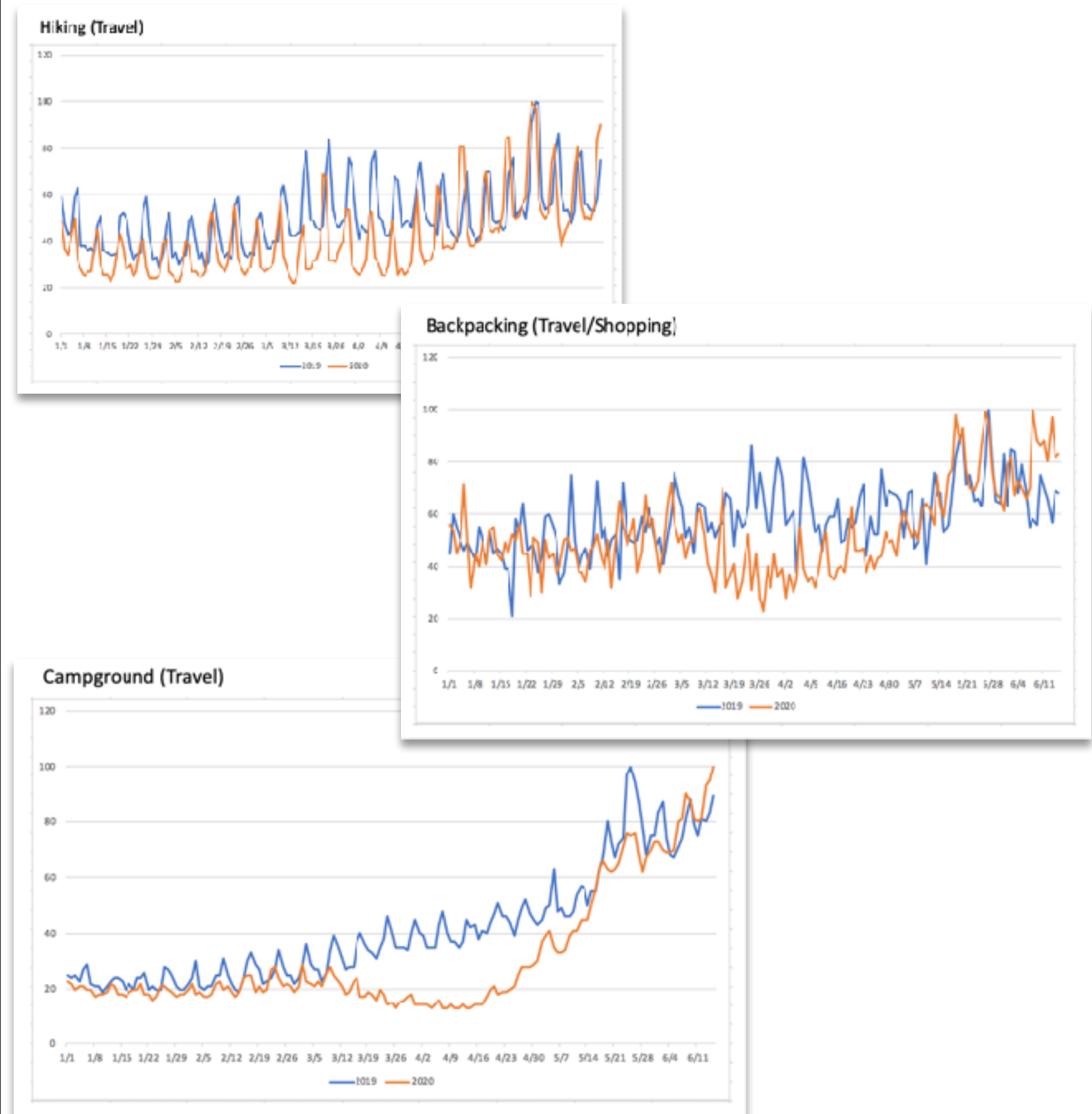
THE POOL OF TRAVELERS INTERESTED IN OUTDOOR RELATED TRAVEL IS GROWING.

GOOGLE SEARCH TRENDS POINTED TO A SPIKE IN OUTDOOR-RELATED TERMS, REACHING HIGHER NUMBERS THAN PREVIOUS YEARS.

TRIPADVISOR HAS NOTED THAT SEARCHES ARE PIVOTING FROM URBAN DESTINATIONS TO LOCATIONS WITH MORE OPEN SPACE AND CAMPING OPTIONS.

OUTSIDE MAGAZINE'S READER SURVEY:

- 96% WANT TO TRAVEL TO GET INTO NATURE AND UNCROWDED, OPEN SPACES
- 91% PARTICIPATE IN ADVENTURE ACTIVITIES WHILE VACATIONING
- 86% HIKE
- 75% VISIT NATIONAL PARKS OR STATE PARKS





# TRAVEL PLANNING



WITH MORE TIME BEHIND SCREENS AT HOME, CONSTANTLY CHANGING REGULATIONS AND RESTRICTIONS, AND NEW EXPECTATIONS AROUND HOW TO TRAVEL, TRAVELERS ARE CONDUCTING MORE RESEARCH THAN EVER, FROM EARLY TRAVEL INSPIRATION TO SEARCHING FOR SPECIFIC CURRENT TRAVEL DATA.

INSPIRATIONAL TRAVEL PUBLISHERS SUCH AS AFAR HAVE SEEN AN INCREASE OF OVER 50% IN MONTH-OVER-MONTH WEB TRAFFIC.

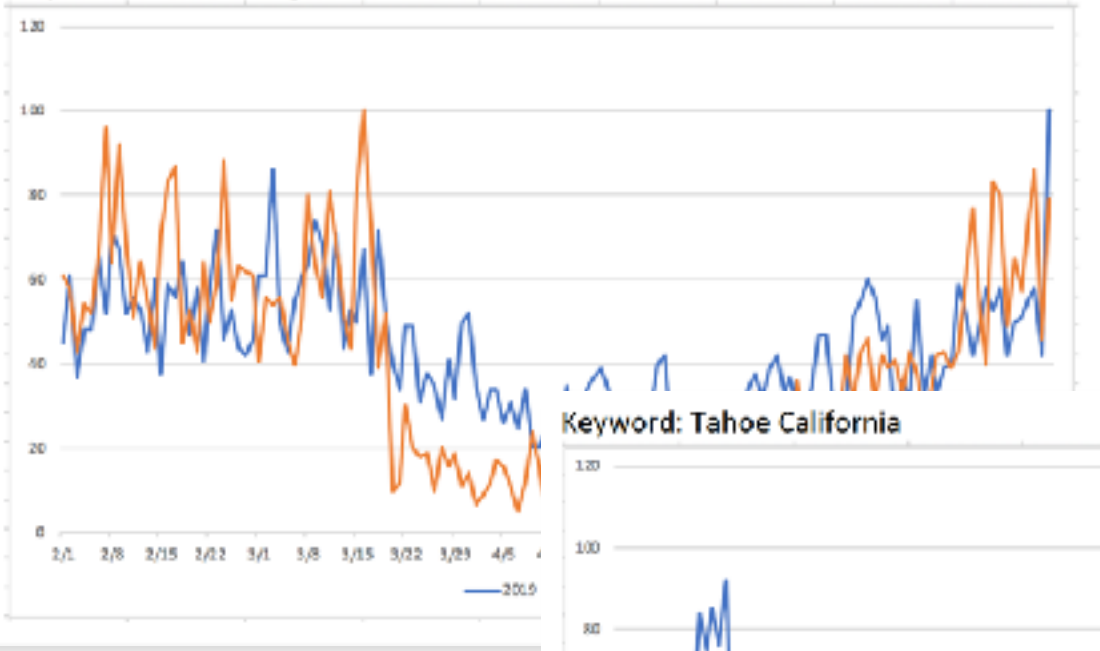
OVER THE LAST TWO WEEKS, THE OUTBOUND COLLECTIVE HAS REPORTED AN INCREASE OF MORE THAN 20% IN VISITORS SAVING OUTDOOR-RELATED TRIP PLANNING TOOLS ACROSS THEIR SITE.

SIMPLEVIEW (A DESTINATION WEBSITE HOSTING COMPANY) REPORTS THAT WEB TRAFFIC ACROSS DMOS HAS BOUNCED BACK TO MATCH 2019 NUMBERS WITH CONSUMERS RESEARCHING LOCAL INFORMATION AROUND RESTRICTIONS AND RULES.

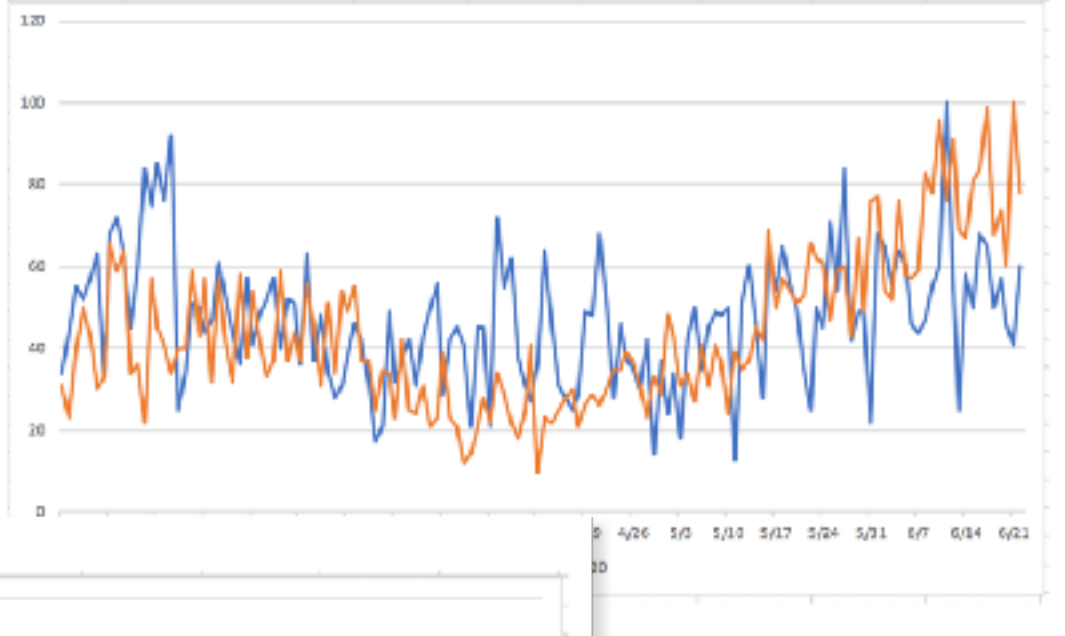
BACKBONE’S OWN TOURISM DESTINATION CLIENTS ARE SEEING UP TO 40% OF THEIR TOTAL WEB TRAFFIC CENTERING ON UPDATES AROUND RESTRICTIONS, SAFE TRAVEL AND CURRENT TRAVEL POLICIES.

OVERALL, SEARCH VOLUME AROUND TRAVEL DESTINATIONS IS ALSO UP.

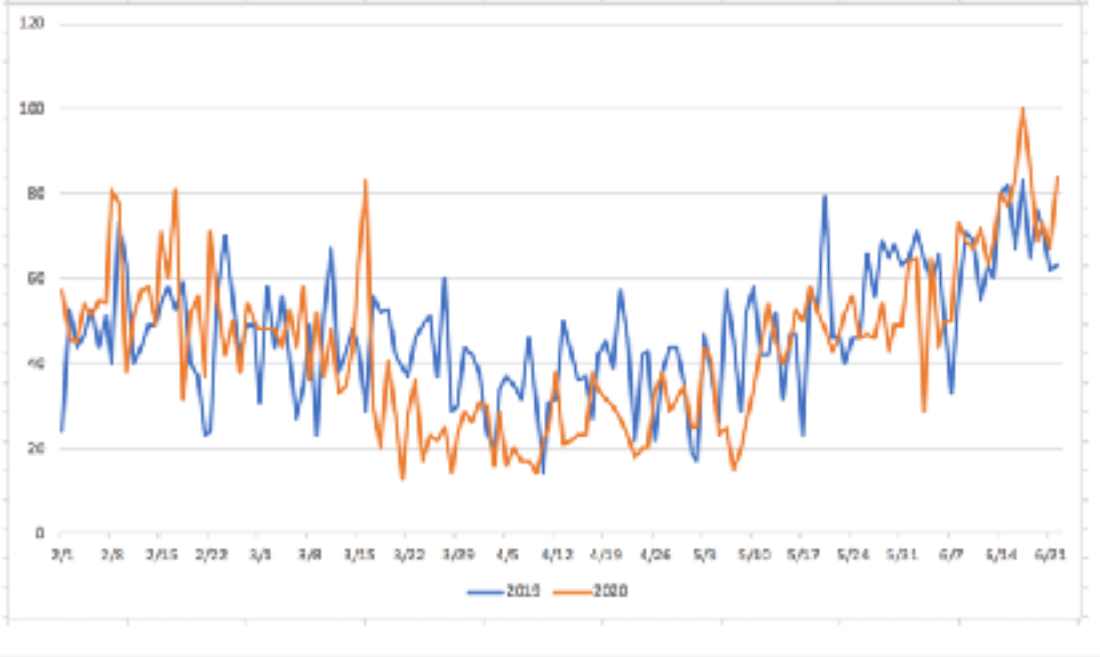
Keyword: Breckenridge Colorado



Keyword: Tahoe California



Keyword: Jackson Hole Wyoming





LOOKING AHEAD



# SUMMER 2020 MARKETING TACTICS



VISIT ESTES PARK IS IMPLEMENTING AN EXTENDED DRIVE MARKET CAMPAIGN UTILIZING SEARCH, SOCIAL, SPONSORED AND OWNED CONTENT. MESSAGING WILL BE EDUCATIONAL, FOCUSING ON SAFETY REGARDING COVID-19 AND DESTINATION SUSTAINABILITY MESSAGING.

facebook

hulu

Outside  
LIVE BRAVELY

dwell

GEARJUNKIE

TRAIL  
RUNNER



DENVER  
Westword



5280 DENVER'S MILE HIGH MAGAZINE



# SUMMER 2020 MARKETING TACTICS



WE CAN'T WAIT TO HAVE YOU BACK TO COLORADO'S ORIGINAL PLAYGROUND. MAKE UP FOR LOST TIME AND RECONNECT WITH THE OUTDOORS THIS SUMMER IN THE MOST BREATHTAKING PLACE FOR IT. START PLANNING YOUR NEXT GETAWAY AT [VISITESTESPARK.COM](https://www.visitestespark.com)

We can't wait to have you back to Colorado's Original Playground. Make up for lost time and reconnect with the outdoors this summer in the most breathtaking place for it. Start planning your next getaway at [VisitEstesPark.com](https://www.visitestespark.com).





## SUPPORTING MARKETING EFFORTS

### AMPLIFYING MESSAGES OF SAFETY & SUSTAINABILITY

TURNER will highlight the array of naturally social distanced and sustainable experiences, as well as promote new and exists safety protocols that make Estes Park an ideal destination for drive-market travel.

### HIGHLIGHT OFF-SEASON OPPORTUNITIES

TURNER will continue to position Estes Park as a top winter destination with world-class outdoor adventures for long lead media opportunities.

## INCREASING BRAND AWARENESS

### HYPER-TAILORED MEDIA OUTREACH

TURNER will increase destination recognition and brand awareness of Visit Estes Park through hyper-tailored proactive pitching efforts that tie into current media trends.

### MEDIA & INFLUENCER HOSTING

TURNER and Visit Estes Park will host carefully selected media and influencers who amplify key messages and increase brand awareness across their social followers and readers.



# VEP PARTNERS: WHAT TO DO NOW FOR A STRONGER REBOUND



## ASK QUESTIONS, DISCOVER PATTERNS

- Are you seeing anything that might show **travel confidence starting to return** (week-over-week increased bookings; from a certain traveler type or month)?
- What are the **top questions/concerns** you are getting from travelers?
- What are some **positive recovery stories** in your community?

## STAND OUT: PROGRAMS & OFFERS

- What **health precautions** are you implementing to keep travelers safe? (e.g. sanitizing stations in public spaces, adjusting breakfast bar/buffets, extra sanitizing in rooms between guests, encouraging social distancing, etc.)
- **Get creative** with packages, deals and incentives (e.g. book a trip to Estes Park before July 30 and receive a \$25 gift card to local restaurant or business).
- Consider **health and wellness programs**, particularly those that focus on mental health (e.g. equine therapy for a mental reset)

## RESOURCES

- YouTube has launched the free tool [Video Builder](#)
- Google has added new [Google Optimize](#) tools to communicate COVID-19 changes

**\*\*Remember to share updates with Visit Estes Park!**



# THANK YOU



# TURNER

a fahlgren mortine company

# BACKBONE

MEDIA