Chaos in the Travel Industry is Fueling Public Opinion

Geo: Global
Time Range: March - July 2022
Demand Is Pushing Travel to New Heights

Buoyed by “revenge travel,” air travel is seeing high demand, and subsequent delays and cancellations are exacerbated by factors like airline staffing issues and the spread of COVID-19. Emerging from current travel chaos are strong trends in public opinion, and dedicated travelers will stick with it until everything levels out.
2022 Has Had Higher Air Travel Demand and Interruptions Than Pre-Pandemic

Online Behavior of a Global Air Travel Audience

As demand for air travel increased above 2019’s levels in April, flight interruptions nearly doubled. We expect that as demand levels out, delays and cancellations will decline in turn.

Percent Share of Travel Engagement Over Time (%):

- 2019 travel lagged briefly after Spring Break, but 2022 has seen a continuous growth in demand

Percent Share of Flight Delays and Cancellations Over Time (%):

- Mask mandates were dropped for most airlines on May 3rd

Online behavior is measured by page views originating from searches, clicks, & shares of content | Geo: Global | Time Frame: January - June 2021 & 2022
A Combination of Factors is Causing Air Travel Delays and Cancellations

Online Behavior of a Global Travel Audience

Percent Share of Factors Widely Discussed (%):

- Travel Demand: 33%
- Crewmembers Out Sick with COVID-19: 25%
- Labor Shortages: 28%
- Bad Weather: 9%
- Air Traffic Controller Shortage: 5%

After pandemic layoffs, airlines and airports are scrambling to grow their labor force back to sustainable levels, while also dealing with a surge in travelers and continued COVID surges.

35% Average week-over-week increase in engagement with the keyword “pilot” as Delta pilots picketed for better working conditions, pay, and benefits

6% Year-over-year growth in travel demand in June of 2022 versus June of 2021

Online behavior is measured by page views originating from searches, clicks, & shares of content | Geo: Global | Time Frame: March - July 2022
Current Travel Trends Are Heightening Travel Demand
Online Behavior of a Global Travel Audience

+41%
Recent average weekly growth in use of the phrase “revenge travel,” expressing travelers’ penchant for adventure after pandemic lock downs and travel bans

+9%
Monthly average increase in discussion around working from anywhere and digital nomadism, made possible by increased acceptance of remote work

+8%
Average monthly growth in engagement with the concept of solo travel

Online behavior is measured by page views originating from searches, clicks, & shares of content | Geo: Global | Time Frame: April - July 2022
The Public Is More Strongly For or Against Particular Airlines This Year

Online Behavior of a U.S. Air Travel Audience

Percent Share of Sentiment by Airline and Year:

- **American Airlines**
  - 2021: 45% Positive, 13% Neutral, 42% Negative
  - 2022: 42% Positive, 37% Neutral, 24% Negative

- **Delta Airlines**
  - 2021: 53% Positive, 37% Neutral, 7% Negative
  - 2022: 50% Positive, 23% Neutral, 27% Negative

- **Southwest Airlines**
  - 2021: 79% Positive, 11% Neutral, 10% Negative
  - 2022: 79% Positive, 35% Neutral, 24% Negative

- **United Airlines**
  - 2021: 82% Positive, 10% Neutral, 7% Negative
  - 2022: 82% Positive, 51% Neutral, 23% Negative

*Airlines can't make choices that will please everyone during these changing times, so consumers are likely to increase loyalty to the airline whose policies most reflects their own views.*

*Sentiment is measured using keywords originating from searches, clicks, & shares of content | Geo: U.S. | Time Frame: April - June 2021 & 2022*
Outdoor Adventures Are Still Topping Travel Wish Lists
Online Behavior of a Global Travel Audience

<table>
<thead>
<tr>
<th>Destination</th>
<th>Search Volume Multiplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. National Parks</td>
<td>26.7x</td>
</tr>
<tr>
<td>Mexico</td>
<td>15.1x</td>
</tr>
<tr>
<td>Japan</td>
<td>9.4x</td>
</tr>
<tr>
<td>France</td>
<td>8.3x</td>
</tr>
<tr>
<td>Italy</td>
<td>7.6x</td>
</tr>
<tr>
<td>Greece</td>
<td>5.0x</td>
</tr>
<tr>
<td>Spain</td>
<td>4.2x</td>
</tr>
<tr>
<td>Disney Parks</td>
<td>4.0x</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>3.5x</td>
</tr>
</tbody>
</table>

These numbers represent volume above average i.e., 26.7 times the average search volume | Geo: Global | Time Frame: May - July 2022
North America is leading outgoing travel

Online Behavior of a Global Travel Audience

Travelers likely to be coming from the U.S., India, and Canada are re-embracing travel the most in recent months.

Top Indexes by Country of Global Travelers:

- US: 9.6x
- India: 7.7x
- Canada: 7.4x
- The Philippines: 6.5x
- Nigeria: 6.1x
- Australia: 5.7x
- Malaysia: 5.3x
- South Africa: 4.8x
- Germany: 4.4x
- Singapore: 4.4x

Index Score (i.e., 9.6x) indicates how much more likely a user in this country is to be travelling | Geo: Global | Time Frame: March - June 2022
Travelers Like to Put Themselves Out There and Value Self Care

Online Behavior by a Global Travel Audience

Highest Indexing Categories Outside of Travel:

- Dating & Personals: 18.7 x
- Event Planning: 17.8 x
- Performing Arts: 17.1 x
- Bicycles: 16.2 x
- Outdoors: 16.0 x
- Wine: 11.2 x
- Spas and Beauty Services: 9.4 x
- Fitness Equipment: 7.9 x

Top keywords used by the global travel audience are “home” and “family time,” suggesting the motivation for many travelers this summer is reuniting with relatives.

Index Score (i.e., 18.7x) indicates how much more likely a user in this audience is to engage with a topic compared to the average ShareThis user.

Geo: Global | Time Frame: March - June 2022
Predictions for the Future of Travel

After this season’s peak in "revenge travel" demand and airline staffing issues, we expect that these, as well as subsequent delays and cancellations, will decline in turn.

As remote work and 'work from anywhere' policies become increasingly common, we anticipate these becoming the norm and for travel levels to continue to be above 2019 levels accordingly.

Airlines can’t make choices that will please everyone during these changing times, so consumers are likely to increase loyalty to the airline whose policies most reflects their own views.

At the moment, U.S. citizens are more likely to be back to traveling, and they’re preferring domestic National Parks, neighboring Mexico, and European vacations.
Thank You