

THE YEAR IN REVIEW & THE YEARS AHEAD

TRAVEL'S RENAISSANCE

How COVID-19 Has Reshaped Travel

DECEMBER 14, 2021

miles
PARTNERSHIP

Phocuswright
Powering great decisions.

With You



Alice Jong
Research Manager
Phocuswright



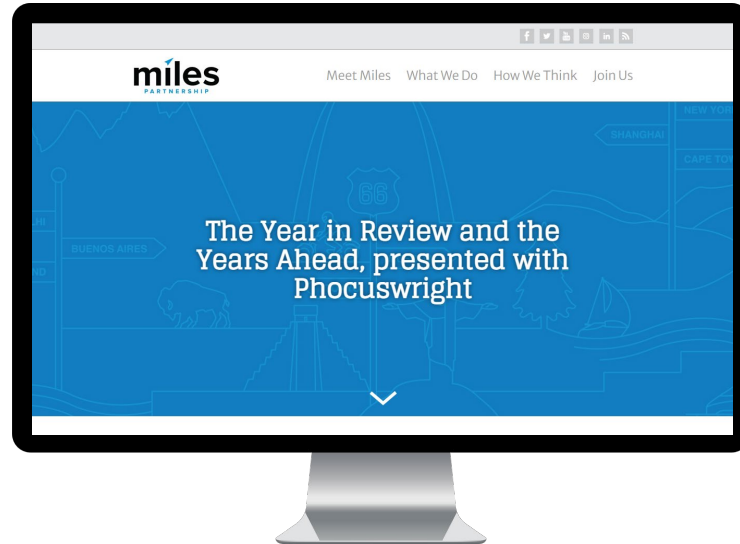
Chris Adams
Head of Research & Insights
Miles Partnership



Elena Prostova
Vice President
Miles Partnership

WEBINAR RESOURCES

Research, slides and other resources will be sent by email and available at www.MilesPartnership.com/Phocuswright





5 TRENDS FOR DMOS

FROM PHOCUSWRIGHT RESEARCH

DECEMBER 2021

Phocuswright 



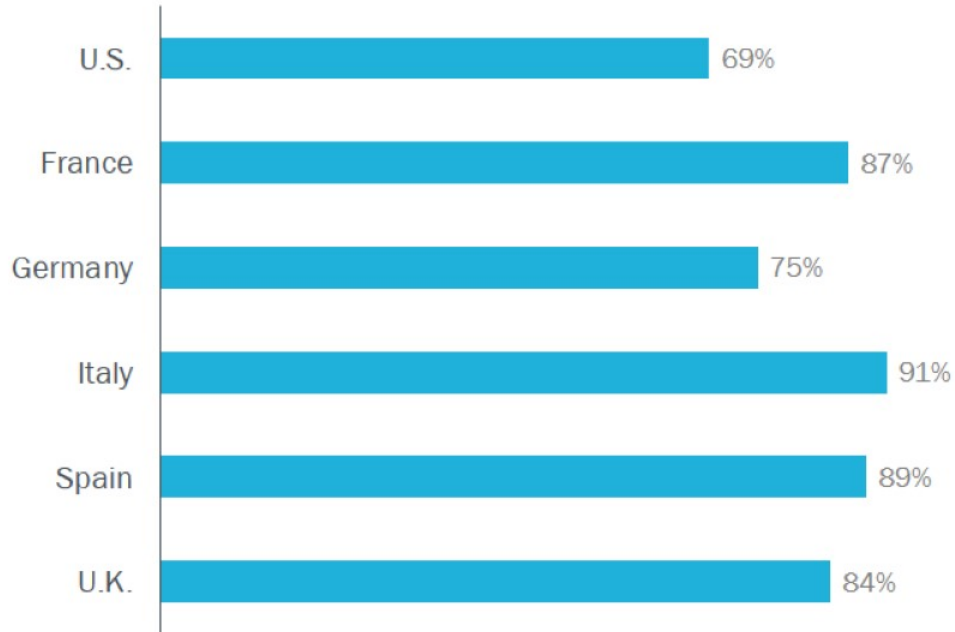
1. COVID COMPLEXITIES

High Priority Discretionary Spend, Top 3

	U.S.	France	Germany	Italy	Spain	U.K.
1.	Travel and tourism	Travel and tourism	Travel and tourism	Travel and tourism	Travel and tourism	Travel and tourism
2.	Dining & nightlife	Home improvements	Dining & nightlife	Home improvements	Dining & nightlife	Home improvements
3.	Home improvements	Dining & nightlife	Electronics	Electronics	Home improvements	Dining & nightlife



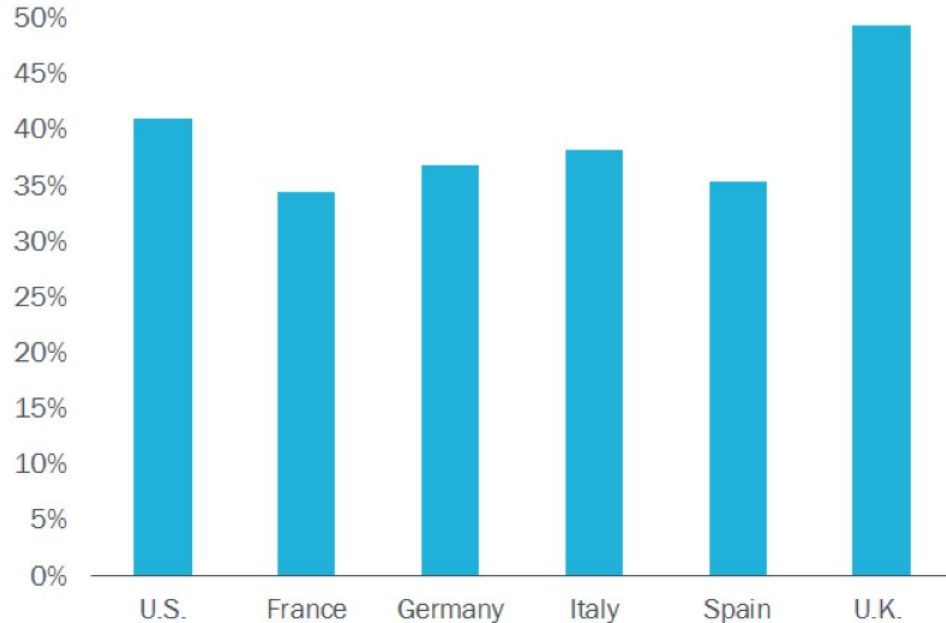
Flexible Booking Policies More Important Compared to Before COVID-19



Clear consensus that **flexible cancellation, rebooking or refund** policies remains critical.



Willing To Test For Travel



Less than half
**willing to submit
negative Covid test**
for travel privileges.





Takeaway

Travel remains beloved but can be daunting in the pandemic-era. Too many pain points will deter travelers. Help ease the burden of potential headaches to instill confidence that travel is still worth the effort.



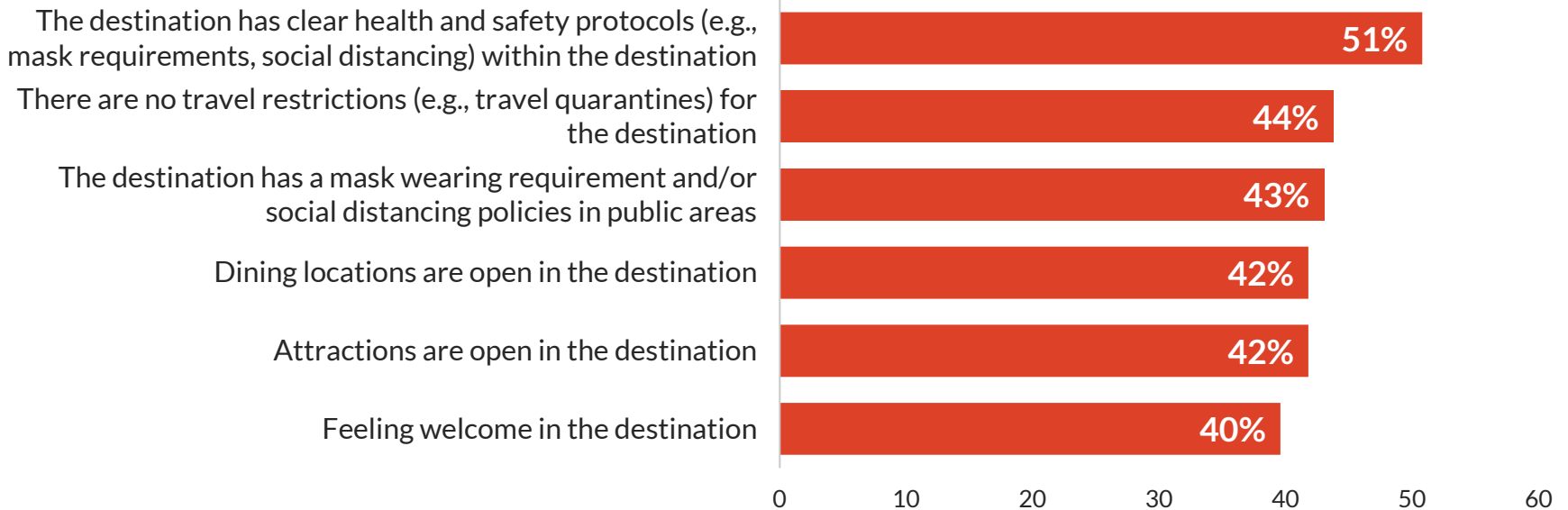
Covid Complexities

IDEAS IN ACTION

miles
PARTNERSHIP

IMPACT ON TRAVEL PLANS

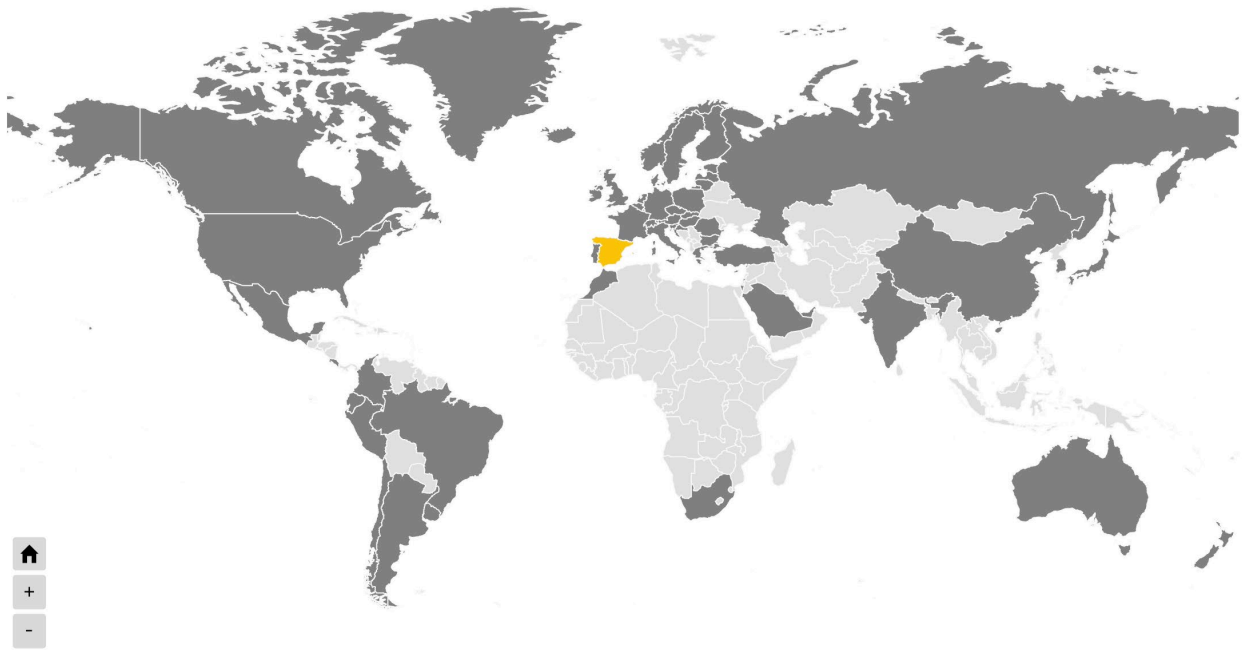
Which of the following factors are important when deciding which destination(s) to visit in the next six months?



Select your origin country

Travel to Spain, select your destination region

Origin country ▾



Ísland.is

Are you traveling to Iceland?

Find out what rules apply when you visit Iceland.

This quick guide to COVID-19 border measures will help you find out what general rules apply when entering Iceland. The information provided here is for guidance only. A final decision on entry is in all cases made at the border. Please note that no testing or quarantine requirements apply for those born in the year 2005 or later.

Are you an Icelandic citizen, permanent resident or have other strong ties within the Icelandic community (see definition)?

Starting 1 October, all travellers who enter Iceland, and are considered to have close ties within the Icelandic community, will only need to undergo a COVID-19 test after arrival in Iceland and don't need to present a negative result prior to boarding. They are not required to quarantine, but are asked to limit their interactions in the first few days after arrival.

The following groups are considered to have close ties within the Icelandic community are:

- Citizens of Iceland
- People who live in Iceland
- Anyone intending to work or study in Iceland for more than 7 days



Get the SafeTravel app!

The SafeTravel app provides critical information about road safety in Iceland



Driving in Iceland

Conditions in Iceland are unusual. Reach your destination safely

[Learn about driving in Iceland](#)

Outdoors in Iceland

Good preparation is the key for successful travel

[Being outdoors in Iceland](#)



Weather and Road conditions

Be safe in Iceland

[Go to Travel Conditions Map](#)

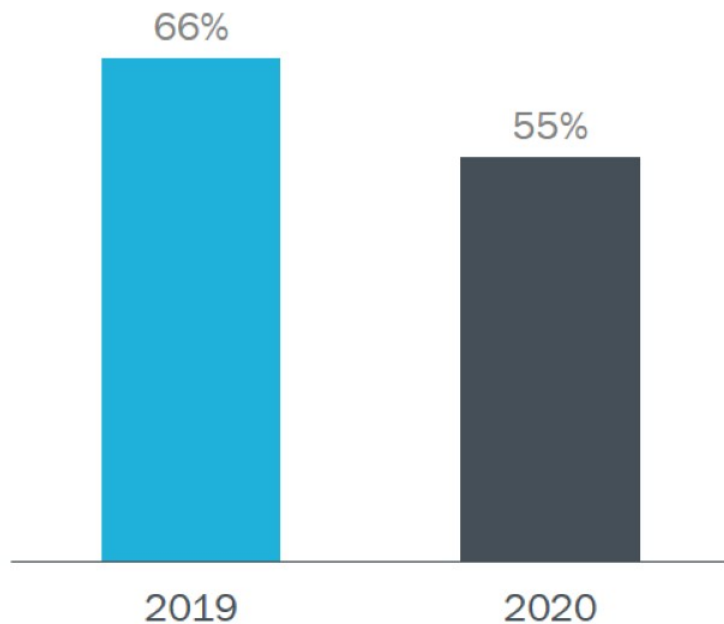


A blue-tinted photograph of a house with a porch and hanging plants. The text "2. RISE OF RENTALS" is overlaid in white.

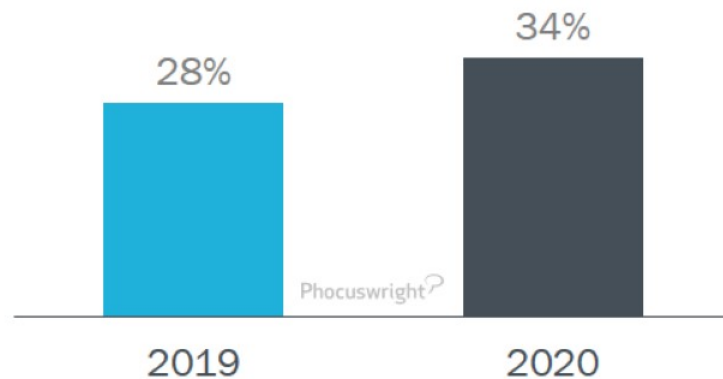
2. RISE OF RENTALS

Hotels' Loss is Rentals' Gain

Hotel Stay Incidence



Short-Term Rental Incidence



2020 brought a **surge of new users** to short-term rentals.

First (and most recent) STR stay





STRs are not a default choice.

64%

of rental travelers also considered a hotel
the last time they booked an STR.



Short-term rental category strengths

Offering more
privacy **53%**

Better value
for money **47%**

A personalized
experience **50%**

More
comfortable **44%**

Hotel category strengths

On-site/nearby
food & beverage **44%**

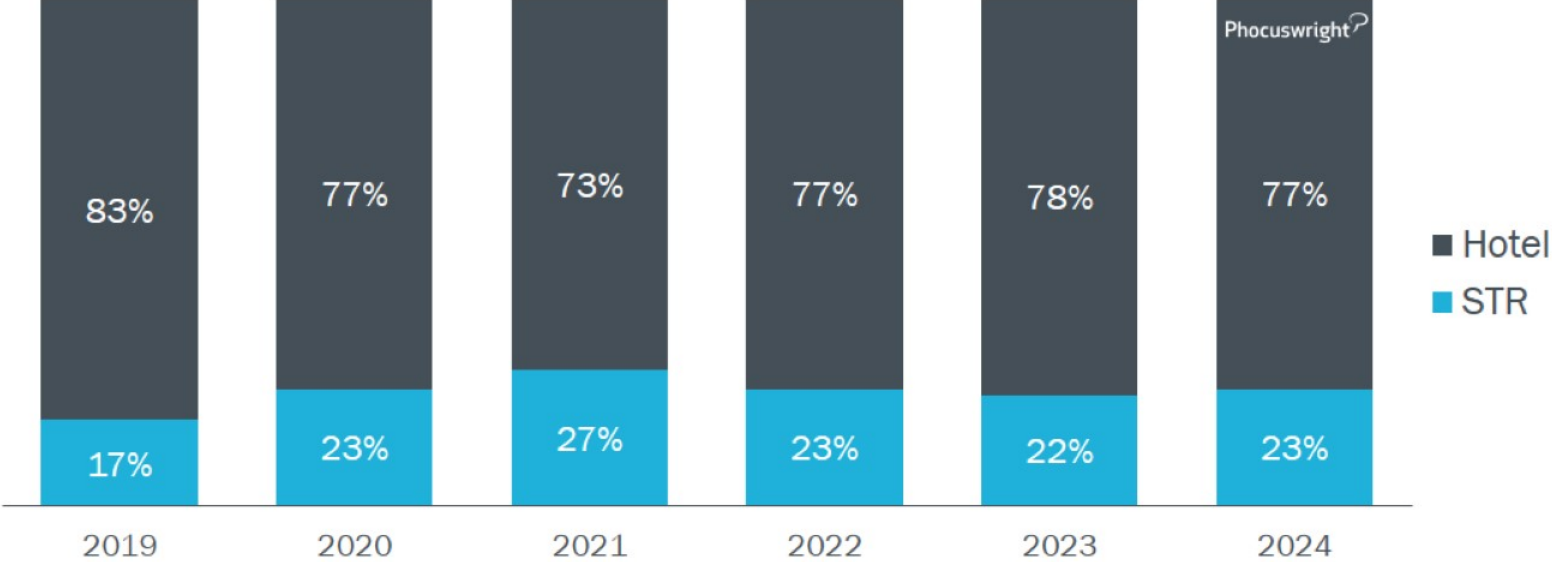
Professional **40%**

Attentive **42%**

Secure **39%**



U.S. STR vs Hotel Share of Total Accommodation Market Gross Bookings (%), 2019-2024



Source: Phocuswright's U.S. Short-Term Rental Report 2021; U.S. Hotel & Lodging Market Report 2020-2024



Takeaway

Rentals got a boost and the pandemic brought an influx of first-time users. But hotels will get their groove back. Each offers unique strengths.

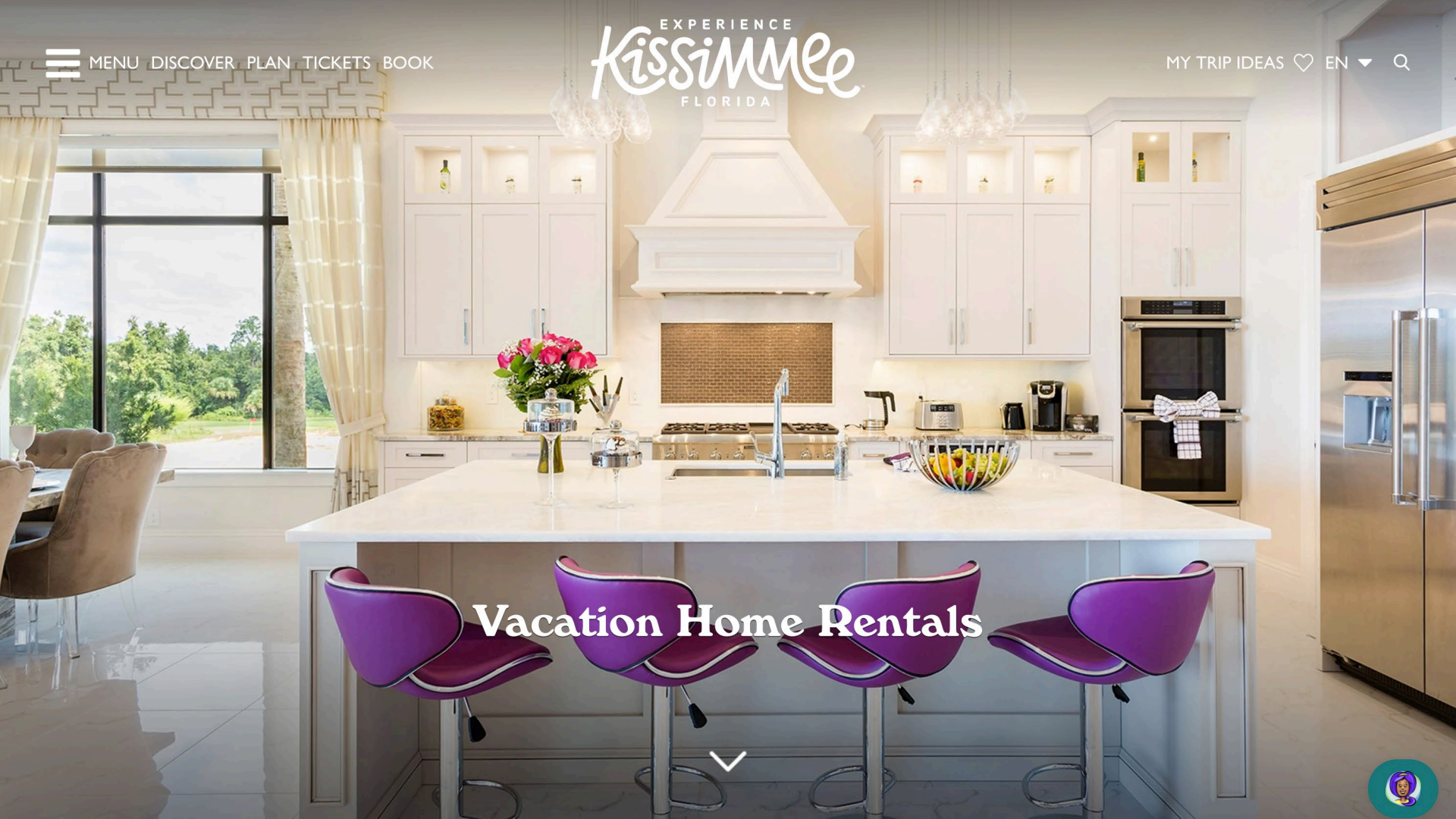




Rise of Rentals

IDEAS IN ACTION

miles
PARTNERSHIP



Vacation Home Rentals



ONE



SHORT TERM RENTALS IMPACTS

AFFORDABLE HOUSING CONSTRUCTION DEVELOPMENT FINANCE

Workforce Housing Project Planned for Glenwood Springs

milehighcre — August 26, 2021



Home • Caribbean

Tourism industry workers in Jamaica to get affordable homes next month

By WIC News Reporter - 26 December 2020, at 3:05 am

[Share on Facebook](#) [Tweet on Twitter](#) [G+](#) [Pin](#)



HOME ABOUT ▾ PROJECTS HOT TOPICS ▾

Maui's Visitor Industry Can Fund Affordable Housing for Residents

ON 08/31/2021 CATEGORIES: DEVELOPMENT, HOUSING, OVER TOURISM, TOURISM



SHORT TERM RENTALS IMPACTS

Professionalizing Short Term Rental Management & Marketing

1. Destination Management

- Work with local government, tourism & community to define the benefits, costs & management objectives for STR

2. Permitting

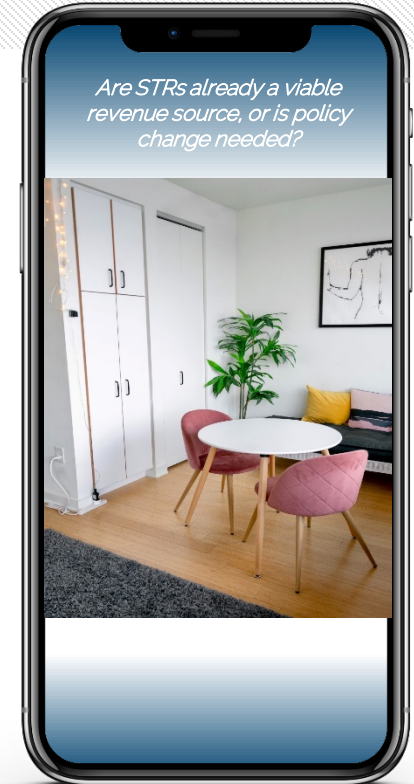
- Permitting should reflect these objectives
- Differentiate between professional vs. occasional rental hosts
- Balance the needs of all community groups

3. Tax & Assessment Treatment

- Consistent Application of Bed Tax
- Voluntary Collection Agreements
- Tourism Improvement Districts (TIDs)

4. Education & Enforcement

- Monitoring, oversight & follow up critical to managing sector & collecting available revenue





Updated Funding Futures Report, Slides, Recording & Resources

www.MilesPartnership.com/FundingFutures2021



A person with long blonde hair is sitting on a rock in a mountain valley, using a laptop. The scene is overlaid with a blue tint. The person is seen from behind, looking out over a valley with a river and mountains in the distance. The text "3. NEW NOMADS" is overlaid in white on the image.

3. NEW NOMADS

The Stereotype

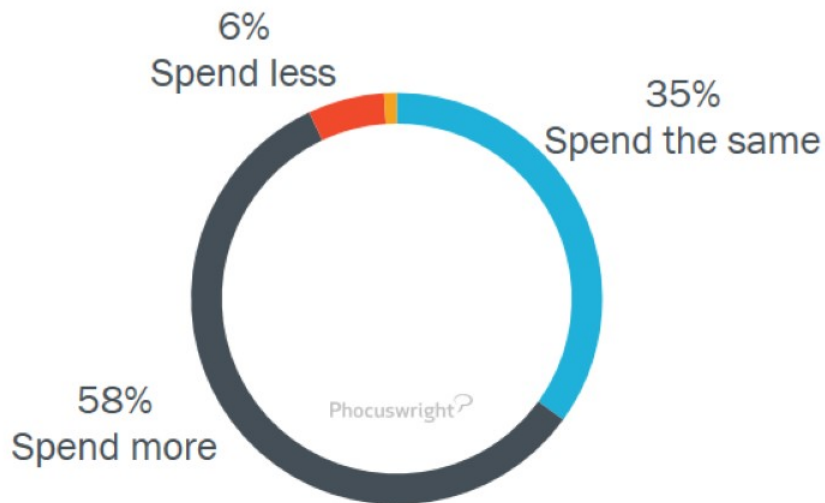


Myth Busting

- **Wider age range:** Nearly **three in five** are age 35+.
- **Employed full-time:** Nearly **four in five** have full-time jobs with an employer
- **Highly educated:** More than **two in five** hold advanced degrees.
- **High earners:** More than **half** earn \$100k or more per year
- **Senior in careers:** **Three in four** with employers are middle management+
- **Partnered up:** **Nearly three in four** have a significant other
- **Have kids:** **Two in three** have kids



Living Expense Spend Willingness While Traveling Compared to When Back Home



Willing to maximize the experience, Lifestyle Nomads **aren't cutting corners on budget.**

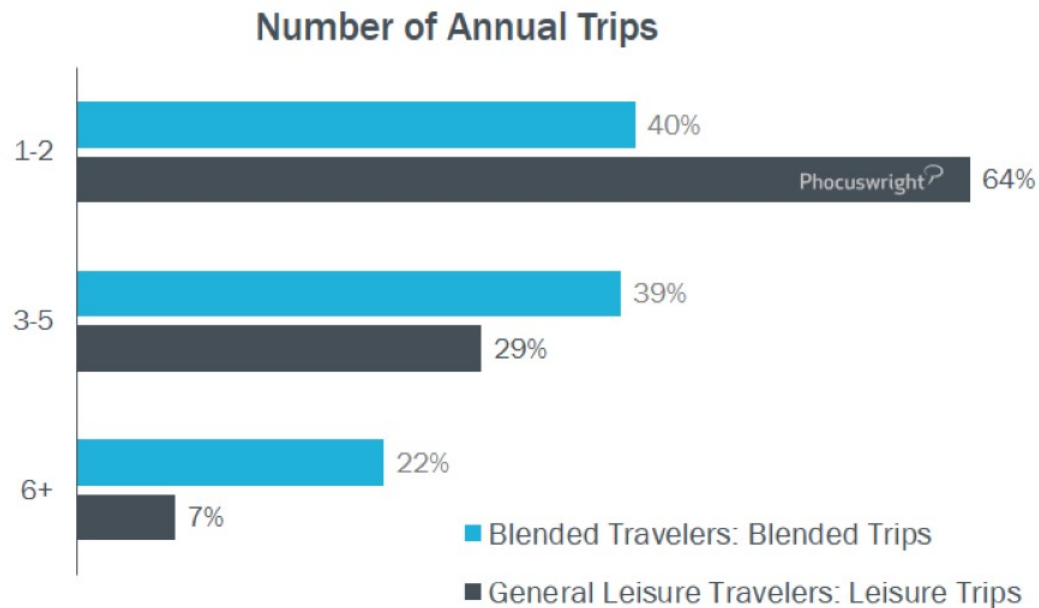
Question: Which of the following best describes your approach to budgeting for a trip where you will stay as a digital nomad? Select one.

Base: Identify with a lifestyle that combines remote working and personal travel (N=711)

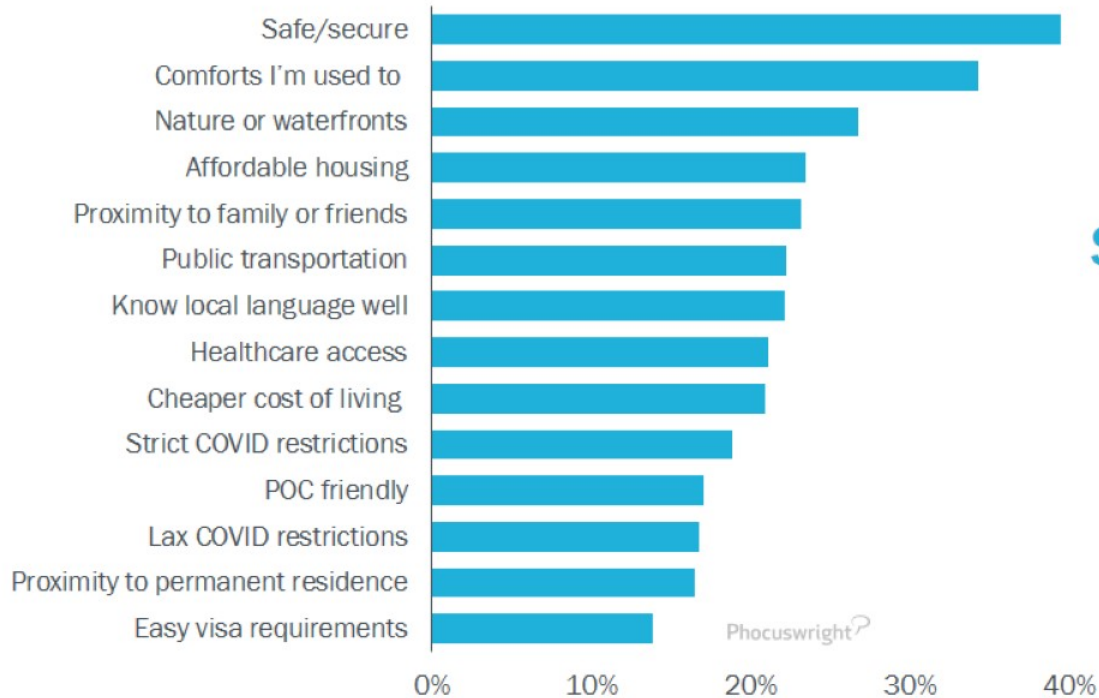
Source: Phocuswright's *The New Nomads: Work & Play From Anywhere*



Blended travelers
take **far more**
frequent leisure trips
than the general U.S.
leisure traveler.



Destination Selection Criteria



Safety and comfort are top drivers of destination selection.

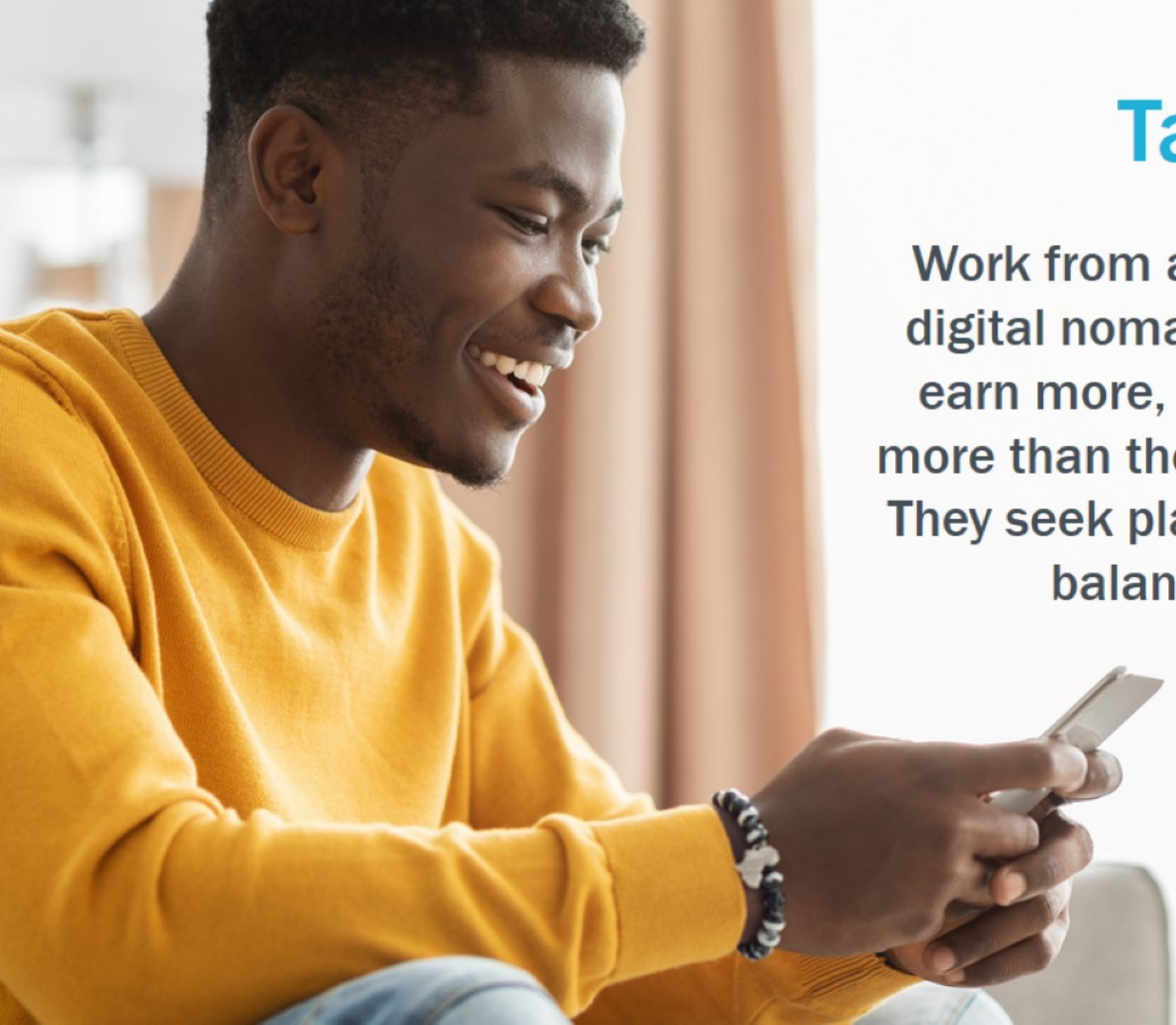


89%

say incentives (e.g., easy visas, stipends, free flights or lodging) make a destination more appealing for remote work.

Source: Phocuswright's *The New Nomads: Work & Play From Anywhere*





Takeaway

Work from anywhere has redefined digital nomadism. The new nomads earn more, spend more, and travel more than the general leisure traveler. They seek places that will allow them balance work and play.



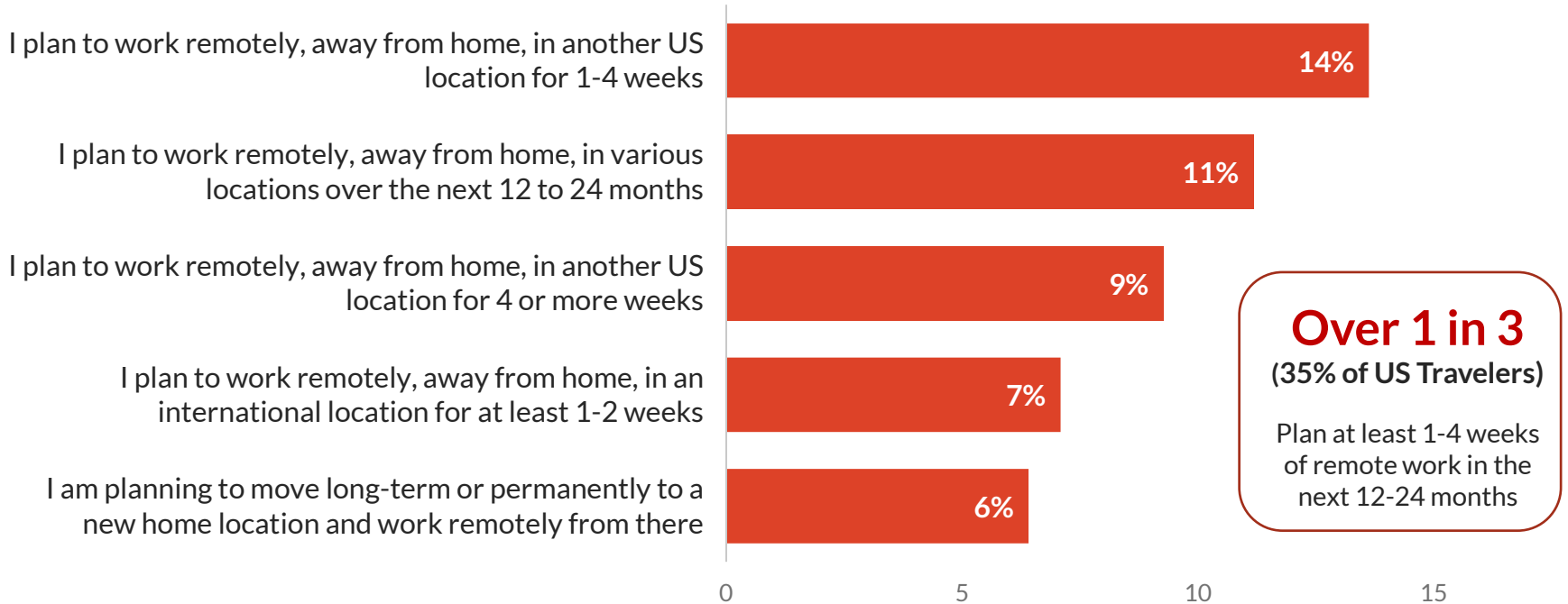
Digital Nomads

IDEAS IN ACTION

miles
PARTNERSHIP

REMOTE WORKING ON THE RISE

Which of the following describes your remote work plans within the next 12-24 months?





Win a Trip to Work from Puerto Rico

It's time to trade your office views for the vibrant and inspiring hues of the heart and soul of the Caribbean—Puerto Rico!

Working in full color from paradise is just as unique and colorful as it sounds. You can start your workdays with Puerto Rico's emerald mountains as your Zoom background, or maybe you prefer to wake up with front-row seats to the Island's turquoise waters. Even weekdays in Puerto Rico will feel like you're on your dream Caribbean getaway, so why work from anywhere else?

With no passport, visa, or application requirements for U.S. citizens, choosing to work from Puerto Rico is a no-brainer.



Work in Full Color

Thank you for your interest in working from Puerto Rico. This contest is now closed, and winners will be notified on or around May 20. In the meantime, click [here](#) to learn why Puerto Rico is the right choice for working remotely.

[READ THE FULL CONTEST RULES >](#)



**WORK REMOTELY.
CONNECT WITH ALOHA.**

OUR MISSION

Attract, integrate and retain key talent, especially returning kama'āina, to create a more innovative, resilient and sustainable Hawai'i

Movers and Shakas runs place-based immersion programs designed to attract, integrate and retain key talent, especially returning kama'āina, to learn, contribute and connect in Hawai'i:

- **Cohort Fellow Program (CFP):** our 30-day flagship experience directed towards remote workers, especially returning kama'āina, to relocate and/or build economic ties to Hawai'i
- **Hawai'i Talent Onboarding Program (HTOP):** our 8-week community orientation to facilitate newly relocated talent's cultural, social, and professional transition to Hawai'i [launching in 2022]



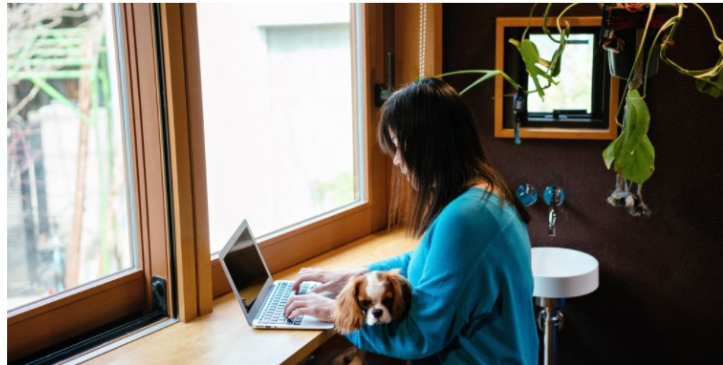
AIRBNB DOUBLES DOWN ON REMOTE WORKERS

How to make your space comfortable for remote workers

Keep your listing competitive by setting up a laptop-friendly workspace.

By Airbnb on Jul 21, 2020 · 4 min read

Updated Apr 28, 2021



Attract guests with the new wifi speed test

Find out how to verify and showcase your wifi speed – a top Airbnb amenity.

By Airbnb on 11 Aug 2021 · 2 min read

Updated 3 Nov 2021




DIGITAL NOMADS

lonely planet

Travel News > All Travel News Stories > Central America > Costa Rica > You can do your job...

You can do your job from Costa Rica with this new 12-month digital nomad visa

SASHA BRADY 20 AUGUST 2021
Lonely Planet Writer




schengenvisainfo news

Policy | EU/Schengen | Romania


Romania's Digital Nomad Visa to Bring Many Benefits for Its Holders

November 11, 2021 [Subscribe to our daily news digest](#)





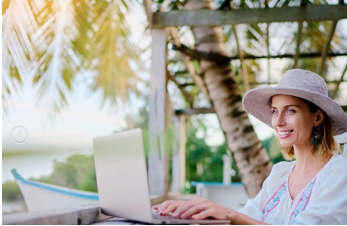
Romania's decision to introduce the Digital Nomad Visa scheme would bring more benefits for holders of such travel permits compared to other European countries or even the United States where the cost of living is nearly 50 per cent higher.



Greece introduces Digital Nomad Visa

BARBADOS

Home Apply Now Why Barbados FAQs Job Offers View Guidebook




Work Remotely in Barbados!

WORK REMOTELY FROM PARADISE FOR A YEAR...

[Apply Now](#)

Bali: 5-Years Visa And Tax-Free Stay For Digital Nomads

Costanza Tagliaferri June 20, 2021



A man with a beard and short hair is smiling broadly, looking off-camera to the right. He is holding a smartphone in his right hand and a credit card in his left hand. The entire image is overlaid with a semi-transparent blue filter. The background is a blurred office or indoor setting.

4. SELLING SUBSCRIPTIONS

NETFLIX



Thrillist

NEWS • FLIGHT DEALS

TripAdvisor's New Subscription Service Will Get You Major Travel Discounts

Pay \$99 a year, save an average of \$350 *per trip.*

By [Megan Schaltegger](#) Published on 6/29/2021 at 1:22 PM

yahoo/finance Search for news, symbols or companies [Sign In](#) [Mail](#)

[Finance](#) [Watchlists](#) [My Portfolio](#) [Screeners](#) [Yahoo Finance Plus](#) [Markets](#) [News](#) [Personal Finance](#) ...

eDreams ODIGEO reports strong trading with bookings 22% above 2019, outstanding expansion in Prime with a further half million new subscribers and return to profitable growth

November 17, 2021 - 6 min read

Business Traveller FORUM NEWS CITY PROFILES SUBSCRIBE

News

Citizen M launches subscriptions for remote workers

16 Oct 2020 by Hannah Brandler

PhocusWire



INSPIRATO TO GO PUBLIC VIA SPAC MERGER WITH THAYER VENTURES

THE WALL STREET JOURNAL. [Subscribe](#) | [Si](#)

[U.S.](#) [Politics](#) [Economy](#) [Business](#) [Tech](#) [Markets](#) [Opinion](#) [Books & Arts](#) [Real Estate](#) [Life & Work](#) [WSJ Magazine](#) [Sports](#)

Stressed by Vacation Planning? These 'Travel Clubs' Promise VIP-Style Service and Perks

Eager to lure wary travelers back into the fold, airlines, hotels, even RV parking sites are rolling out membership plans offering secret deals, insider access and more

By [Matthew Kronsberg](#)
Nov. 26, 2021 1:00 pm ET

CNBC [MARKETS](#) [BUSINESS](#) [INVESTING](#) [TECH](#) [POLITICS](#) [CNBC TV](#) [WATCHLIST](#)

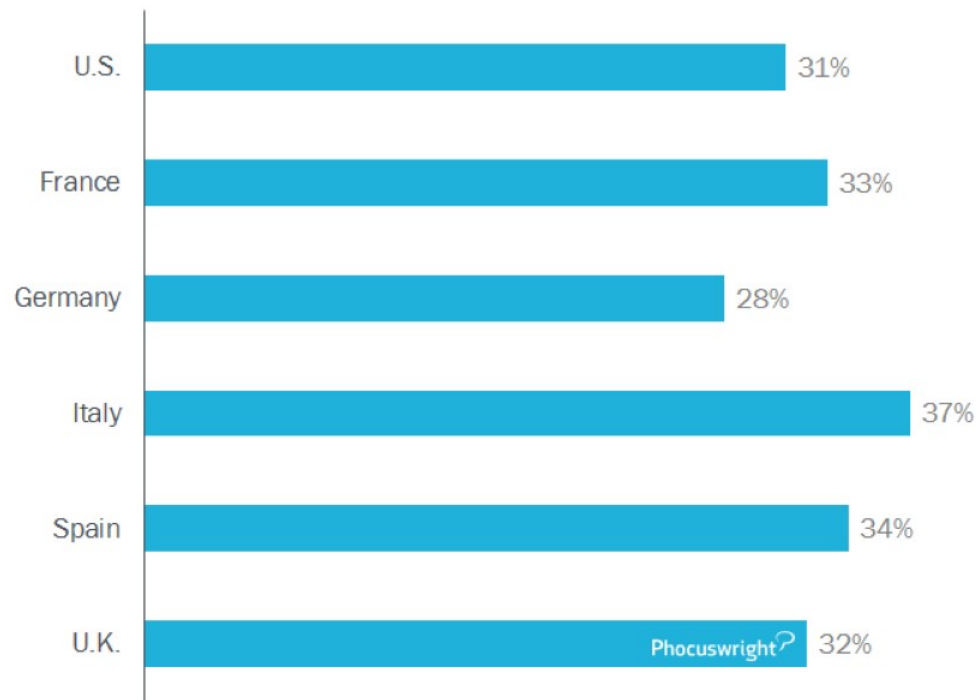
PERSONAL FINANCE

Travel + Leisure launches online trip booking functionality and subscription memberships

PUBLISHED SAT, SEP 11 2021-10:00 AM EDT

Still early days, but approximately **one in three** already interested.

Likely to Join Paid Travel Subscription





Takeaway

Subscriptions have seen wild success in several industries outside travel. Non-believers say that trip infrequency is the demise of travel subscriptions, but travelers voice interest. Young travelers especially have a greater appetite for subscription products.

Selling Subscriptions

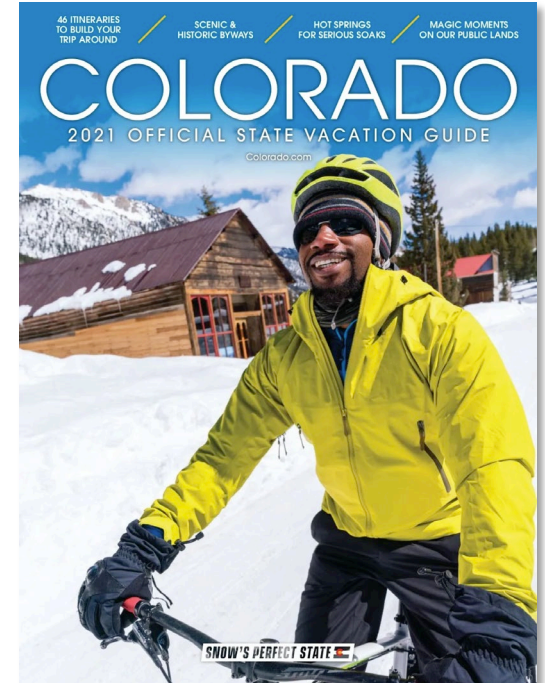
IDEAS IN ACTION



miles
PARTNERSHIP

SUBSCRIPTION OPPORTUNITY FOR DESTINATIONS

DMO "owned media" such as Visitor Guides provide a powerful opportunity to build subscription marketing with high value, repeat visitors and locals.



SUBSCRIPTION OPPORTUNITY FOR DESTINATIONS

Visitor Guide Users are Attractive Subscribers

- **30% higher** average Household Income (\$104,041 vs. \$81,483)
- **2x** feel now is good time for them to spend on leisure travel (57.9% vs. 27.4%)
- **2x** expect to spend more on travel in the next 12 months (52.4% vs. 26.1%)
- Almost **3x** researched travel ideas online in the past week (45.3% vs. 18.2%)
- **Far** more interested in new travel experiences or destinations (7.7 vs. 5.9 11-pt scale)
- Almost **4x** visited a National Park during their overnight trip in the past month (23.0% vs. 6.5%)



THE IMPACT OF DMO VISITOR GUIDES

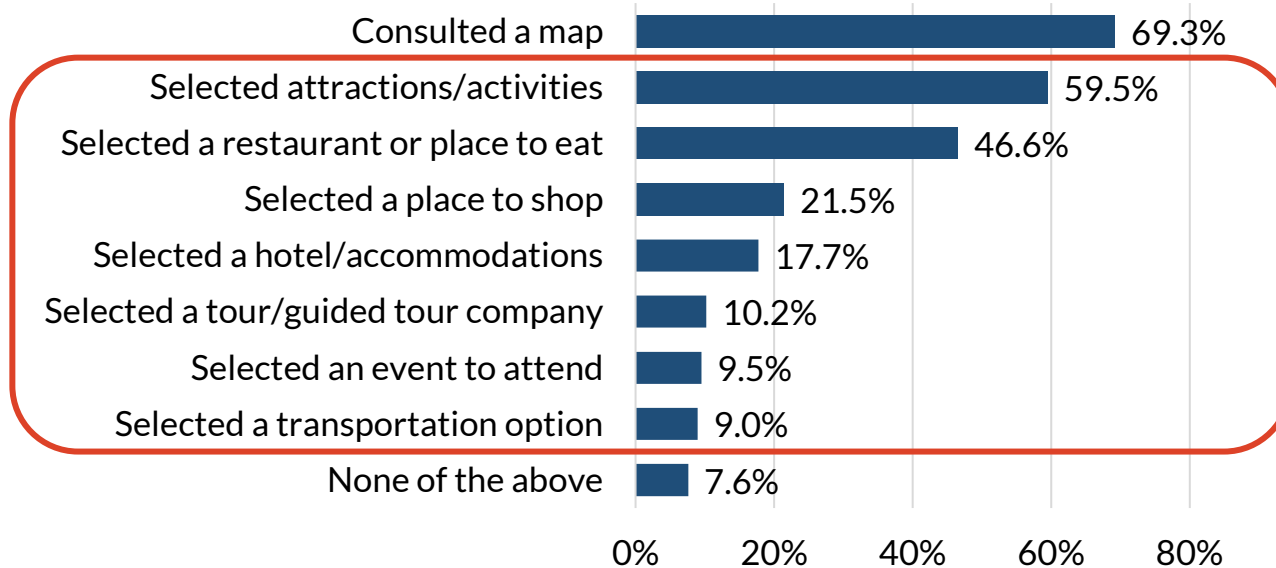
2020-2021 DMO Visitor Guide Readership & Conversion Study

DMAwest
destination marketing association of the west
education & research foundation

Destination  Analysts

SUBSCRIPTION OPPORTUNITIES

Visitors: Travel Planning Tasks Completed Using DMO Visitor Guide



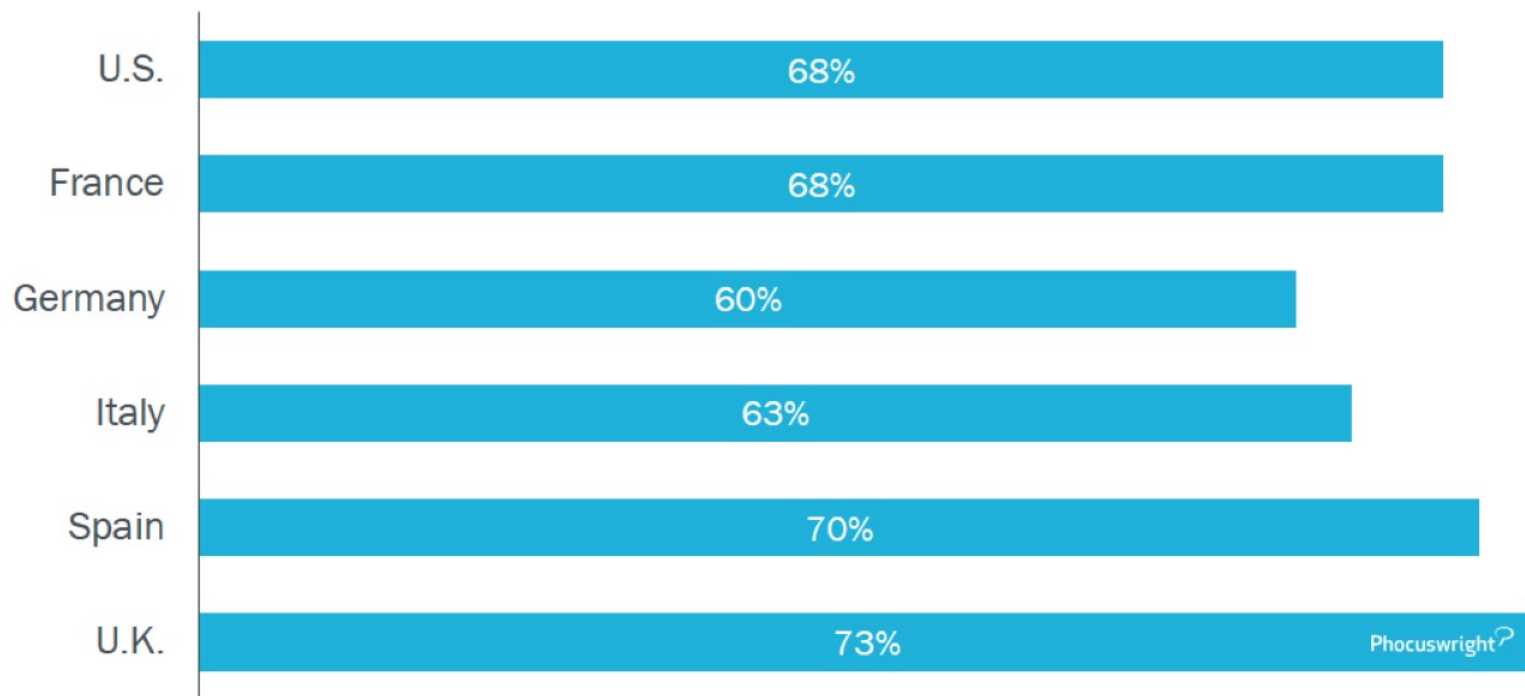
Which of these travel planning decisions or tasks did you make or complete based on information from the [DESTINATION] Official Visitors Guide? (Select all that apply)

Base: Respondents who visited the destination since reading the Visitors Guide, 932 completed surveys.

A woman wearing a hat and sunglasses, sitting on a beach and using a laptop, with a blue overlay.

5. TURNING UP TECH

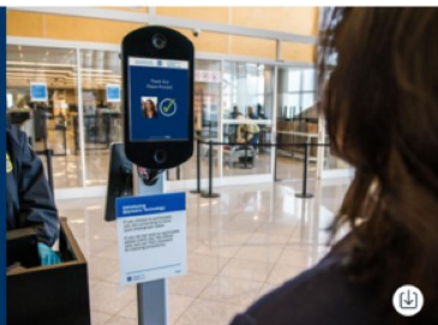
Desire Contactless Options While Traveling



ARTICLE | CUSTOMER EXPERIENCE

Delta launches first domestic digital identity test in U.S., providing touchless curb-to-gate experience

Staff Writer | Jan 29, 2021 12:15pm



Disney Parks Blog

[Destinations](#) | [Topics](#) | [Latest Stories](#) | [Cast Life](#)

Introducing the Disney Park Pass System for Reserving Theme Park Visits to Walt Disney World Resort



by Avery Maehrer, Manager of Communications, Walt Disney World Resort

Less Hassle, More to Explore: Marriott International Continues to Deliver on Consumer Desire for Enhanced Contactless Technology

APRIL 5, 2021 — BETHESDA, MD

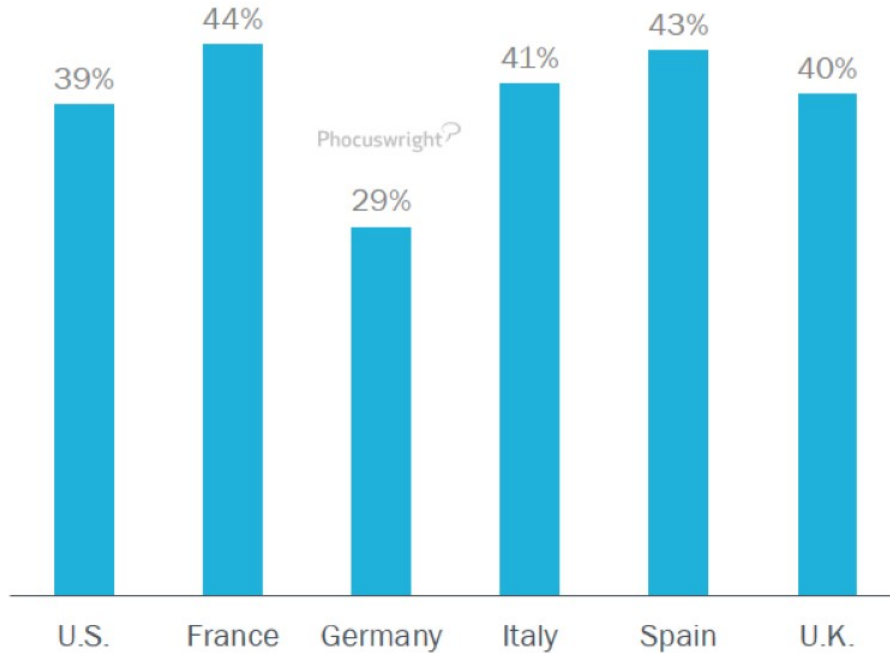
New Pilot Programs Roll Out at Select Hotels, Evolving Seamless Guest Experience and Furthering 'Commitment to Clean'



Contactless Initial Check-in at Hilton NY Times Square



Trust Travel Brands with Biometric Data



Renewed **interest** in
hotly debated
conversation
surrounding **privacy**.



10:35

The image shows the Grab app icon, which consists of the word "Grab" in a green, rounded, sans-serif font centered on a white rounded square background.

Grab

The image shows the DiDi app icon, which features an orange stylized "D" shape on a white rounded square background with a faint grid pattern.

DiDi

Grab

Betting on an **app** first world



Join TechCrunch+

Indian digital payments giant Paytm files for \$2.2 billion IPO

Manish Singh @refsrc / 1:39 AM EDT • July 16, 2021

FASTCOMPANY

12-02-21

Grab goes public: Southeast Asia's superapp debuts on Nasdaq today in SPAC deal



Grab's debut will be the "largest-ever U.S. public market debut by a Southeast Asian company."



INSIDER

Log in

Subscribe

Premium HOME > TECH

UNICORN PITCH DECK: Hopper raises \$175 million to build a travel super app as startups hold out for a post-vaccine tourism boom

Tasmin Lockwood · Aug 19, 2021, 6:08 AM



Takeaway

COVID forced accelerated tech adoption. The new travel environment requires it, and consumers demand it.

Contactless and mobile have been winners, helping to push toward a more seamless and safe travel journey.



Turning Up Tech

IDEAS IN ACTION

miles
PARTNERSHIP

TURNING UP TECH: ROBOTICS



anglerandale • Following
Angler & Ale

anglerandale Our new servers are firing on all cylinders and cannot wait to welcome you this holiday weekend at #AnglerandAle! To make a reservation, please call 305.209.9991.
2w

yatros617 As a server I have to say I'm sad to see this, also I understand the staffing issues a lot of places have, but this still makes me sad for us servers to see.
2w Reply

👍 🗨️ 📌

👍 Liked by hawkscayresort and 42 others
NOVEMBER 24

😊 Add a comment... Post

TURNING UP TECH: SELF-SERVICE TECHNOLOGIES

EXPLORE | TRIP INSPIRATION | TRAVEL GUIDES | PLAN YOUR TRIP | WORLD'S BEST | DESTINATION OF THE YEAR

Hyatt Is the First Hotel Chain to Use Digital Room Keys You Can Access With Apple Wallet

The Apple Wallet room key access areas like gyms, pools, and elevators.

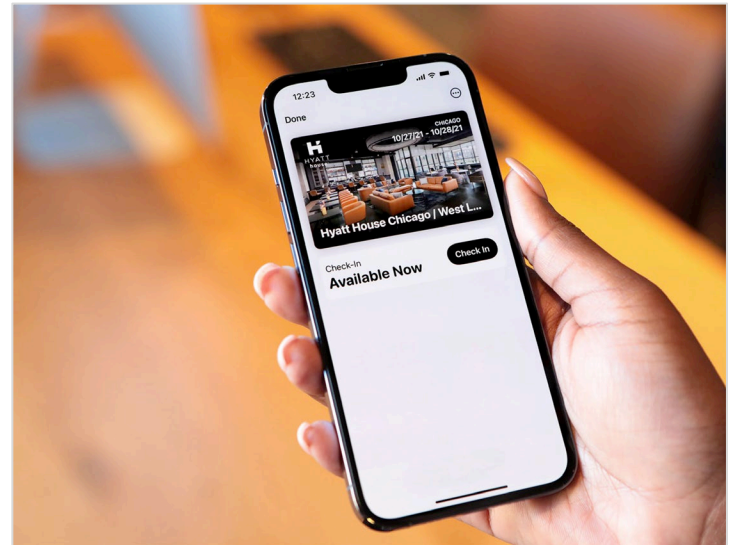


By [Cailey Rizzo](#) | December 09, 2021

- Save
- Pin
- FB
- More



Hyatt has rolled out **room keys in Apple Wallet** at six participating hotels in the US, with plans to roll the technology out across the group's global portfolio.



CREDIT: JEAN-MARC GIBOUX/AP IMAGES FOR HYATT


TURNING UP TECH: EXPERIENTIAL TRAVEL

CNN **underscored** Gadgets Wellness Money Explore About Us Coupons

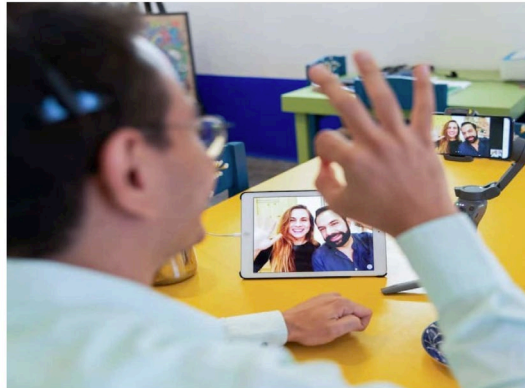
The 19 best travel experience gifts to give this holiday season

By Lindsay Tigar
Updated 1:34 PM EST, Tue December 7, 2021

f t e



Airbnb World's Top Coffee Masterclass
(starting at \$8 per person; [airbnb.c](https://www.airbnb.com))



Airbnb World's Top Coffee Masterclass

Virtual Experiences are becoming mainstream

Intrepid Urban Adventures Peruvian Pisco: A Virtual Cocktail Class (\$12; [amazon.com](https://www.amazon.com))

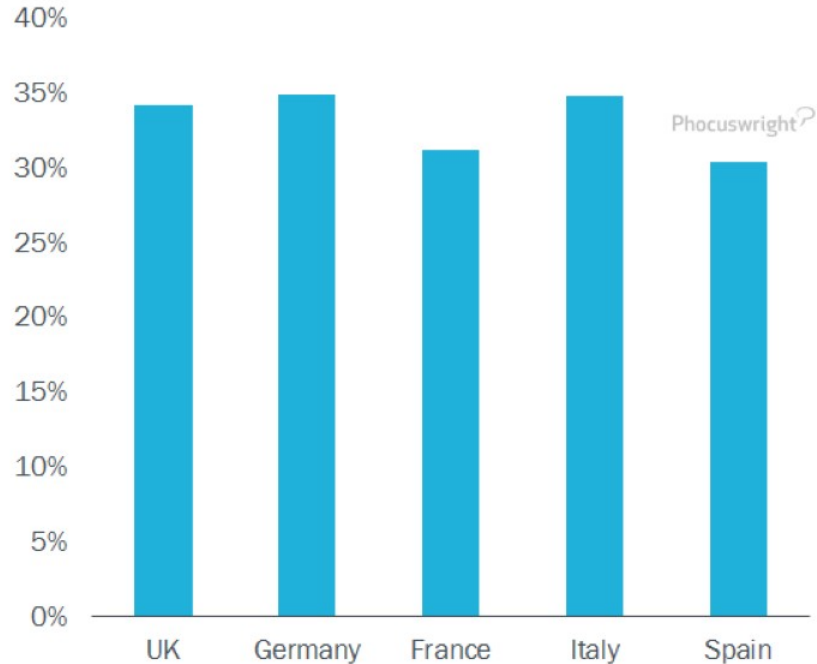


Intrepid Urban Adventures Peruvian Pisco: A Virtual Cocktail Class

Amazon

+ SOLVING SUSTAINABILITY

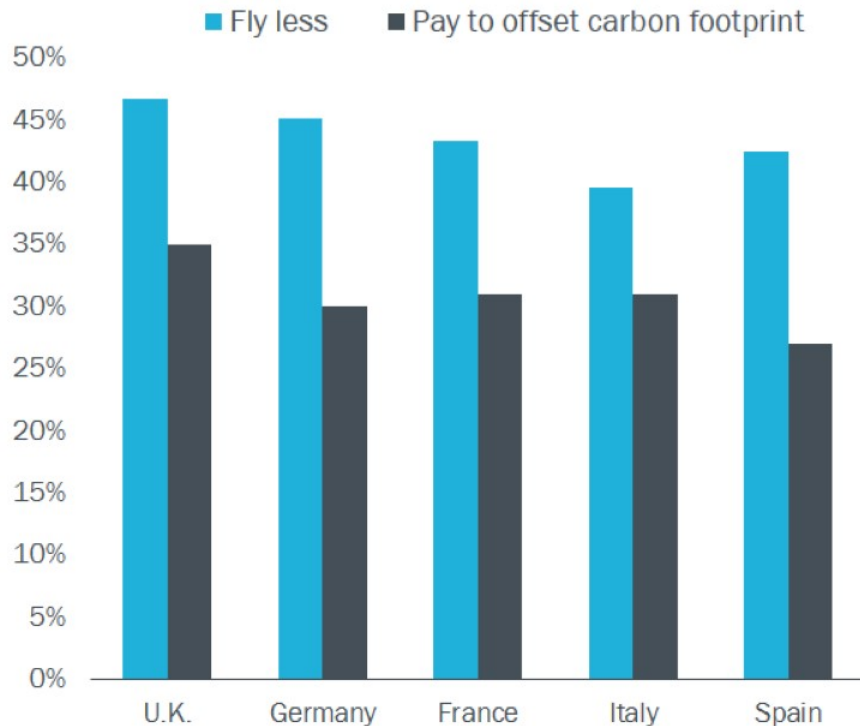
Likely to Pay More For Brands That Prioritize Sustainability



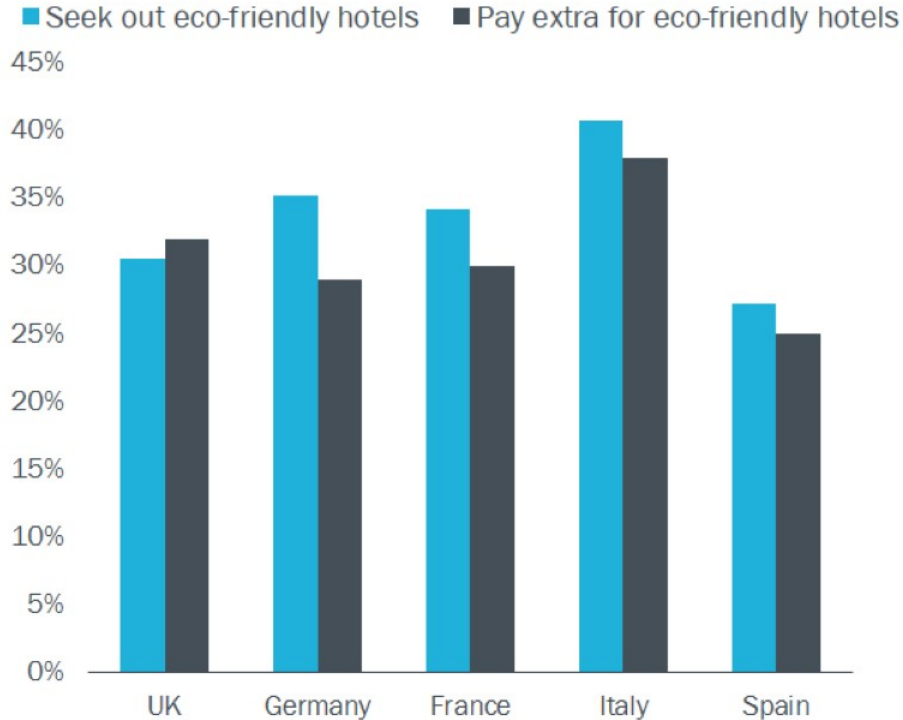
One in three **will pay premium for sustainable brands;** even higher among young travelers.

More willing to **cut back** on flying than **pay to offset carbon footprint.**

Likely to Take Sustainable Air Measures, Next 12 Months



Likely to Take Sustainable Hotel Measures, Next 12 Months



Willingness to pay extra for likewise **lags** intention to seek out sustainable lodging.

Takeaway

A pause in travel gave the industry and consumers time to rethink issues related to sustainability. There is much to be done. But it will be a balancing act among all parties involved to progress towards a more responsible state of tourism.





Sustainability

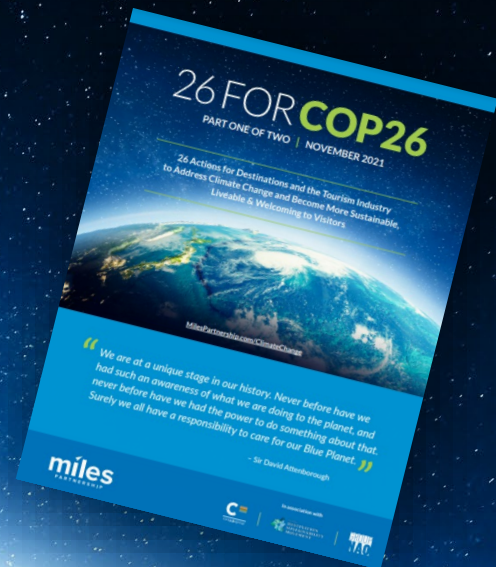
IDEAS IN ACTION

miles
PARTNERSHIP

26 for COP26

26 Actions For Destinations & Their Tourism Industry to Address Climate Change & Make Themselves More Sustainable, Liveable & Welcoming to Visitors

www.MilesPartnership.com/ClimateChange



Two-Part White Paper Series



An aerial photograph of a dark asphalt road winding through a dense, lush green forest. A single white car is visible on the road, positioned in the upper-middle section of the frame. The trees are tall and coniferous, creating a textured canopy of various shades of green.

LEARN

Electric Vehicles

[HOME](#) › [THINK SUSTAINABLY](#) › [THINK SUSTAINABLY CRITERIA](#)

Think Sustainably criteria

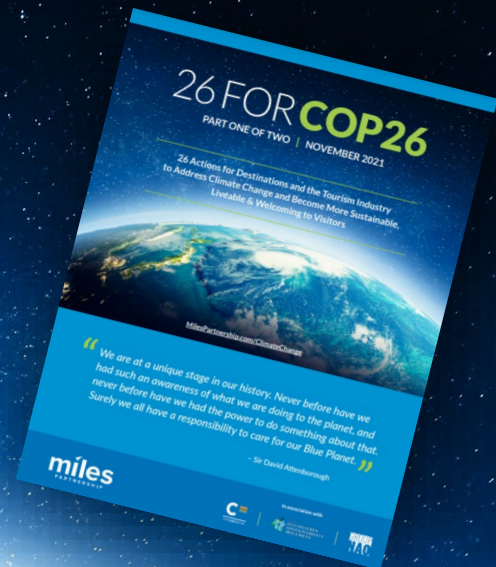




26 for COP26

26 Actions For Destinations & Their Tourism Industry
to Address Climate Change & Make Themselves More
Sustainable, Liveable & Welcoming to Visitors

www.MilesPartnership.com/ClimateChange



Two-Part White Paper
Series



THANK YOU!

Alice Jong

Research Director

ajong@phocuswright.com

Phocuswright 
Powering great decisions.



Resources

Resources (sourced in webinar):

- U.S. Consumer Travel Report 2021: <https://www.phocuswright.com/Travel-Research/Consumer-Trends/US-Consumer-Travel-Report-2021-Series>
- Europe Consumer Travel Report 2021: <https://www.phocuswright.com/Travel-Research/Consumer-Trends/Europe-Consumer-Travel-Report-2021-Series>
- The New Nomads: Work & Play From Anywhere: Forthcoming in January
- U.S. Short-Term Rental Report 2021: Forthcoming December 2021
- 10 things to know about the short-term rental traveler: <https://www.phocuswright.com/Travel-Research/Research-Updates/2021/10-things-to-know-about-the-short-term-rental-traveler> (free)
- 7 in 10 travelers prioritize flexible booking: <https://www.phocuswright.com/Travel-Research/Research-Updates/2021/seven-in-ten-travelers-prioritize-flexible-booking> (free)
- Travel expected vs. booked: <https://www.phocuswright.com/Travel-Research/Research-Updates/2021/travel-expected-vs-booked> (free)

Free Conference Video Sessions (as relate to topics that were touched upon in the webinar):

- Executive Interview: Tripadvisor - Steve Kaufer: <https://youtu.be/dlQ5D89s4wc>
- Phocuswright Research: Short-Term Rentals: <https://youtu.be/tRAfzrCkylE>
- Executive Roundtable: Hotels and Rentals - Divide, Conquer or Converge? <https://youtu.be/QPuo3S0krWQ>
- Travel's Dilemma - Are We Making Our Mark or Leaving One? <https://youtu.be/E76bEW-8rll>
- All Phocuswright Conference 2021 sessions: <https://www.phocuswrightconference.com/On-Demand/2021/Center-Stage>



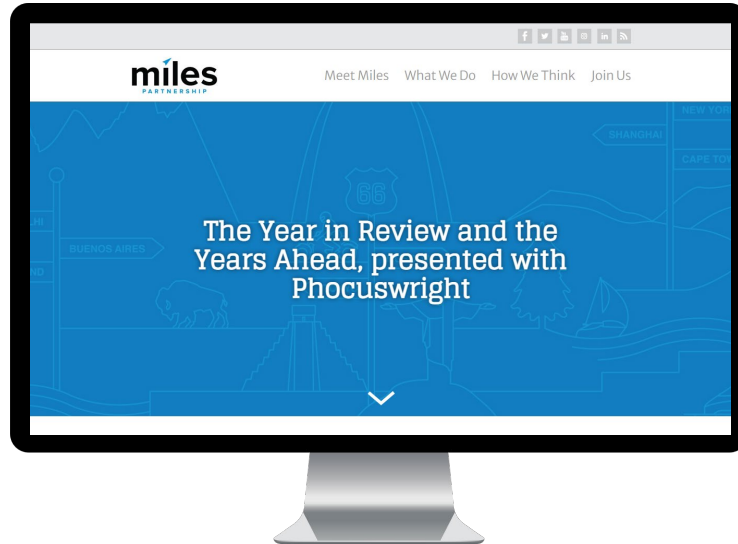


Phocuswright

Special Offer: Open Access Subscription for DMOs
www.phocuswright.com/Subscriptions/Open-Access-DMO

WEBINAR RESOURCES

Research, slides and other resources will be sent by email and available at www.MilesPartnership.com/Phocuswright



TIME FOR DMOCRACY

A Global Study of Best Practices for Partnering
with Local Residents & Tourism Businesses

Learning labs on critical processes &
programs to engage with locals

Collaborate & network with peer DMOs
around the world

20+ major European cities &
destinations already committed

North American Edition

TIME FOR DMOCRACY

A Global Study of Best Practices for Partnering
with Local Residents and Tourism Businesses

*An overview for cities and other destinations
interested in participating.*

MilesPartnership.com/DMOcracy

miles
PARTNERSHIP

In association with

DESTINATION
SUSTAINABILITY
MOVEMENT

GROUP
NAC

TCI Research
Travel Competitive Intelligence

the Travel
Foundation
FOR THOSE YET TO COME

MilesPartnership.com/DMOcracy



Q&A

Thank you!

miles
PARTNERSHIP

Phocuswright
Powering great decisions.