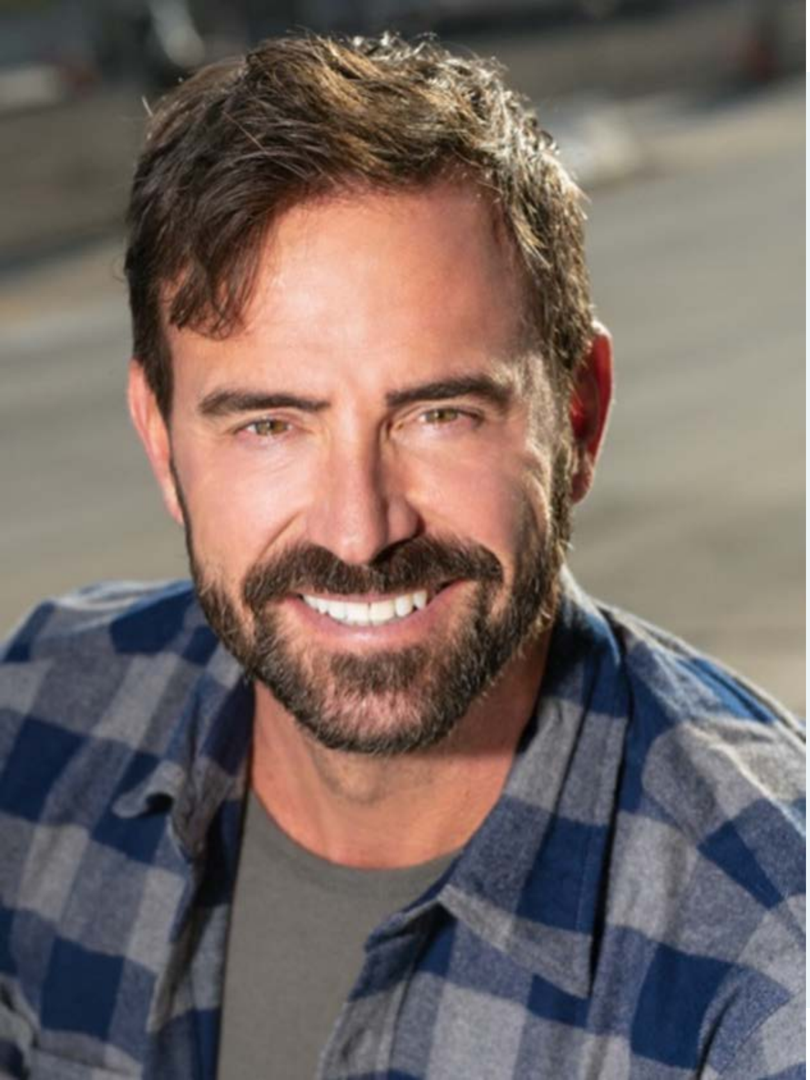
2022

TRAVEL & TOURISM SUMMIT

SANTA MONICA
TRAVEL & TOURISM


Welcome
SANTA MONICA
TRAVEL & TOURISM



ALBIN GIELICZ

Board Chair

Santa Monica Travel & Tourism

WiFi courtesy of

PACIFIC PARK
SANTA MONICA PIER

Password: **PacificPark22**

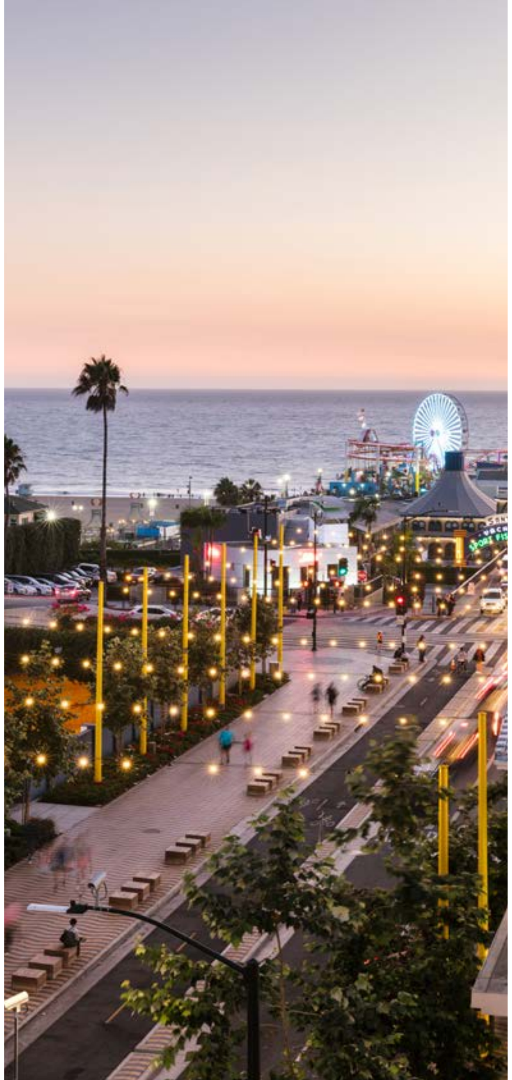
SANTA MONICA
TRAVEL & TOURISM


#SMSummit22


NTTW
Powered by U.S. Travel Association
NATIONAL TRAVEL & TOURISM WEEK
MAY 1-7, 2022

TAKE ON TOMORROW: **RESTORING A VIBRANT AND THRIVING SANTA MONICA**


INSPIRE




SWEETLADYJANE


Welcome
SANTA MONICA
SANTA MONICA
Welcome



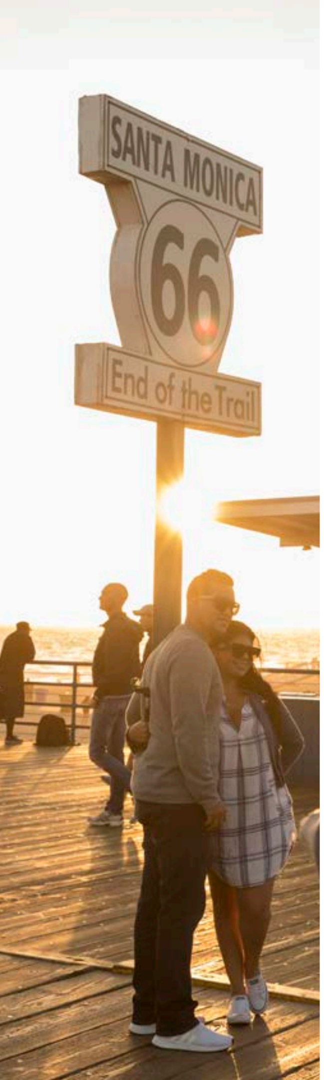


SANTA MONICA
YACHT HARBOR
SPORT FISHING
BOATING
Cafes

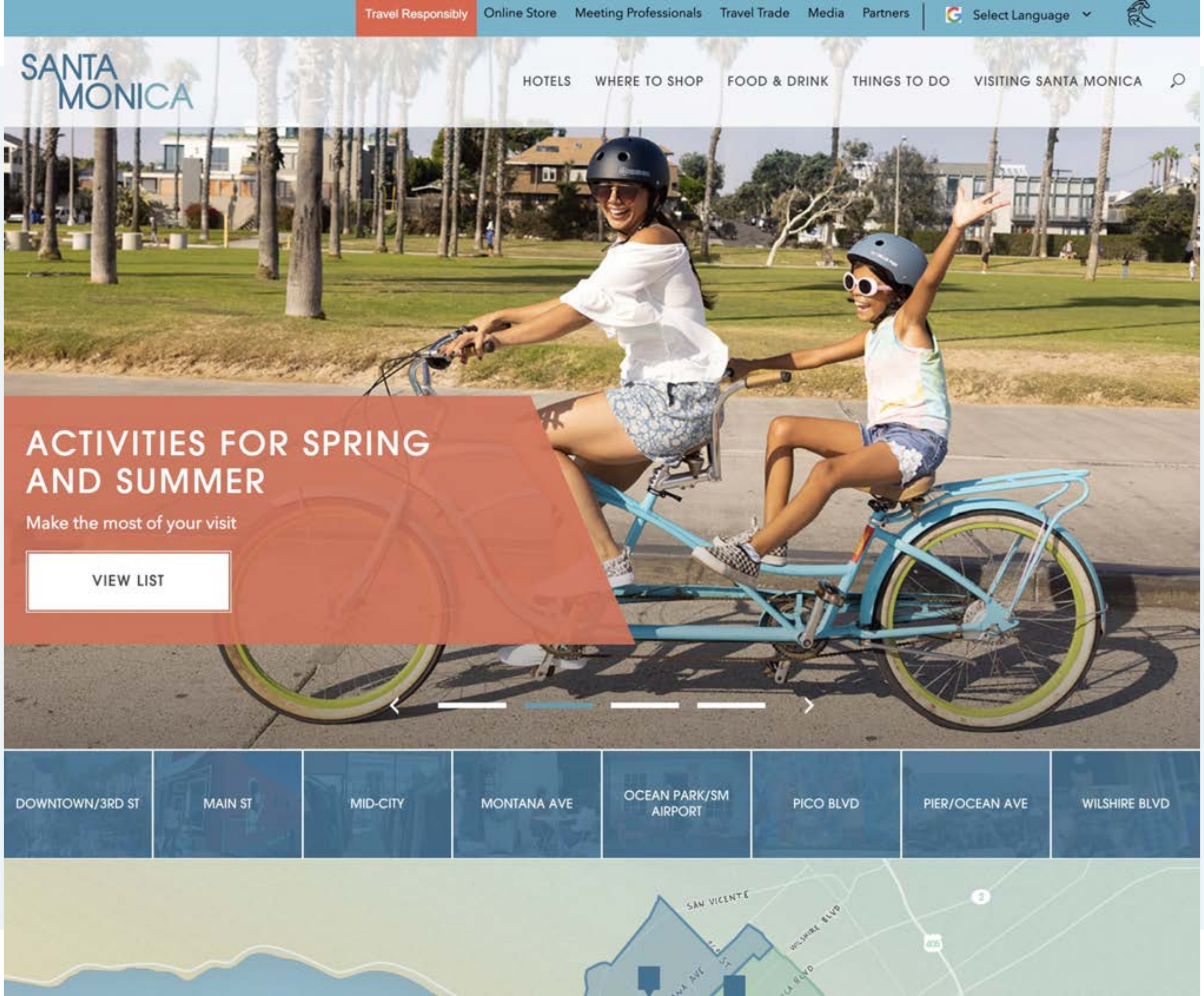
GREEN SANTA MONICA

The City of Santa Monica has been named a LEED Platinum City for its sustainability and resilience achievements

SANTA MONICA
TRAVEL & TOURISM


SANTA MONICA
66
End of the Trail


Downtown Santa Monica E
Metro Rail


Travel Responsibly
Online Store
Meeting Professionals
Travel Trade
Media
Partners
Select Language
SANTA MONICA
HOTELS
WHERE TO SHOP
FOOD & DRINK
THINGS TO DO
VISITING SANTA MONICA
ACTIVITIES FOR SPRING AND SUMMER
Make the most of your visit
VIEW LIST
DOWNTOWN/3RD ST
MAIN ST
MID-CITY
MONTANA AVE
OCEAN PARK/SM AIRPORT
PICO BLVD
PIER/OCEAN AVE
WILSHIRE BLVD
SAN VICENTE

2021/2022 SMTT Board of Directors

Albin Gielicz - Chairman
Resident

Neil Carrey - Vice Chair
Resident

Younes Atallah - Treasurer
General Manager, Loews Santa Monica Beach Hotel

Jan Williams - Secretary
Executive Director, 18th Street Arts Center

Lauralee Asch - Member
Resident

Darlene Evans - Member
Resident

Shahid Kayani - Member
General Manager, Hilton Santa Monica Hotel & Suites

Jeff Klocke - Member
Vice President & General Manager, Pacific Park

Charlie Lopez-Quintana - Member
VP & Managing Director, ETC Hotels

RoseMary Regalbuto - Member
Resident

Anuj K. Gupta - Member
Deputy City Manager, City of Santa Monica

SANTA MONICA
TRAVEL & TOURISM

Chairman's Circle

- Richard Chaker
- Raphael Lunetta
- William Crookston
- Bill Doak
- Don Girard
- West Hooker
- Jeffrey Jarow
- Katharine King
- Tim Kittleson
- Jean McNeil Wyner
- Ellis O'Connor
- Tony Palermo
- Mary Ann Powell
- Rodney Punt
- Nat Trives

SANTA MONICA
TRAVEL & TOURISM

2022 TMD Committee

Younes Atallah - Chair
General Manager, Loews Santa Monica Beach Hotel

Sam Jagger - Vice Chair
General Manager, Fairmont Miramar Hotel & Bungalows

Aileen Carreon - Secretary/Treasurer
VP of Sales and Marketing, ETC Hotels

Melissa Alvarez - Member
General Manager, Courtyard by Marriott Santa Monica

Kevin Anawati - Member
Director of Sales & Marketing, Le Méridien Delfina Santa Monica

James Graham - Member
General Manager, Sea Blue Hotel

Julien Laracine - Member
Managing Director, Santa Monica Proper Hotel

Jessica Rincon - Member
General Manager, JW Marriott Santa Monica Le Merigot

Juan Viramontes - Member
General Manager, Gateway Hotel Santa Monica

SANTA MONICA
TRAVEL & TOURISM

KATHRYN JEFFERY, Ph.D.

Superintendent & President
Santa Monica College

SANTA MONICA
TRAVEL & TOURISM

DAVID WHITE

City Manager
City of Santa Monica

DANNY ALVAREZ

Chief

Santa Monica Fire Department

SANTA MONICA
TRAVEL & TOURISM

Santa Monica Fire Department

- Introduction
- Fire Department Priorities
- Community Response Unit
- Therapeutic Transport Van

City of Santa Monica

RAMON BATISTA

Chief

Santa Monica Police Department

Panelist

Q & A

THANK YOU

Panelists

SANTA MONICA
TRAVEL & TOURISM

Jeff King Santa Monica Tourism Champion of the Year Award

SANTA MONICA
TRAVEL & TOURISM

Jeff King Santa Monica Tourism Champion of the Year Award

Past recipients include:

- Elaine Polachek
- Shelley Luce
- Nat Trives
- Heal the Bay Aquarium
- Santa Monica Pier & Pacific Park

SANTA MONICA
TRAVEL & TOURISM

Jeff King Tourism Champion Award Recipient

JENNIFER TAYLOR

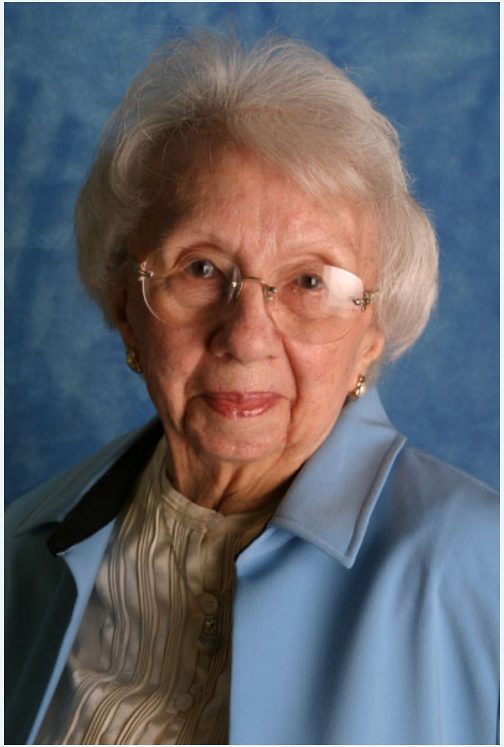
Economic Development Manager
City of Santa Monica

SANTA MONICA
TRAVEL & TOURISM

CHARLIE LOPEZ-QUINTANA

Vice President and Managing Director
ETC Hotels

Thelma Parks Tourism Spirit Award



"Having found myself a tourist many times, I enjoy putting the visitor first."

Santa Monica CHAMBER of COMMERCE

SANTA MONICA TRAVEL & TOURISM

Thelma Parks Tourism Spirit Award

Past recipients include:

- Manju Raman, General Manager, The Huntley Hotel
- Barbara Moss, Banquet Manager Fairmont Miramar Hotel & Bungalows
- Fernando Ceron, Doorman, Loews Santa Monica Beach Hotel
- Kat Wells, Driver, Circuit (formerly Free Ride)
- Melanie Lawson, Hilton Santa Monica Hotel & Suites (formerly Doubletree)
- Derek Davis, Downtown Santa Monica Ambassador
- Jessica Mahone, Front Desk Manager, JW Marriott Santa Monica Le Merigot
- Mickey Barnes, Server, The Lobster
- Elizabeth Wilsonhoyles, Director of Guest Services, The Huntley Hotel

Santa Monica CHAMBER of COMMERCE

SANTA MONICA TRAVEL & TOURISM

Thelma Parks Tourism Spirit Award Recipient

DARIUS SMILEY

Guest Services Agent

Le Meridien Delfina Hotel

SANTA MONICA

TRAVEL & TOURISM

Visit California

CAROLINE BETETA

President & CEO

Visit California

SANTA MONICA

TRAVEL & TOURISM

Santa Monica Travel & Tourism

Tourism Summit

Wednesday May 4, 2022

Caroline Beteta

President & CEO

Visit California

visit California

- Officially formed in 1996
- Nonprofit 501(c)6
- 19,000+ assessed businesses
- Mission: Create desire for the California experience
- 37-member board of directors

Board Leadership

LEGO LEGOLAND CALIFORNIA RESORT

BHN BURBA HOTEL NETWORK

CLIA

CASA de FRUTA

Disneyland RESORT

enterprise

ALTERRA MOUNTAIN COMPANY

Marriott

CALIFORNIA GOVERNOR'S OFFICE OF BUSINESS AND ECONOMIC DEVELOPMENT

Hilton

Hertz

PURE LUXURY TRANSPORTATION Committed to Perfection

Littler

HYATT

SAN FRANCISCO

Grapeline Wine Tours

RODNEY STRONG VINEYARDS

UNIVERSAL STUDIOS HOLLYWOOD

RH RIDGEMONT HOSPITALITY

Evans Hotels

San Diego

FOUR SEASONS Hotels and Resorts

IHG HOTELS & RESORTS

visit greater palm springs

EVOLUTION HOSPITALITY

ACCOR

Hornblower

F FAT FAMILY RESTAURANT GROUP

avis budget group

Santa Monica Board Representation

Marriott

Hilton

Hertz

enterprise

EVOLUTION HOSPITALITY

ACCOR

avis budget group

Santa Monica Tourism Representation

Misti Kerns

President & CEO, Santa Monica Travel & Tourism

- CEO Destination Council
- Marketing Advisory Committee
- Professional Meetings & Events Task force

State of Tourism

Tourism Related Spending
$100.2B

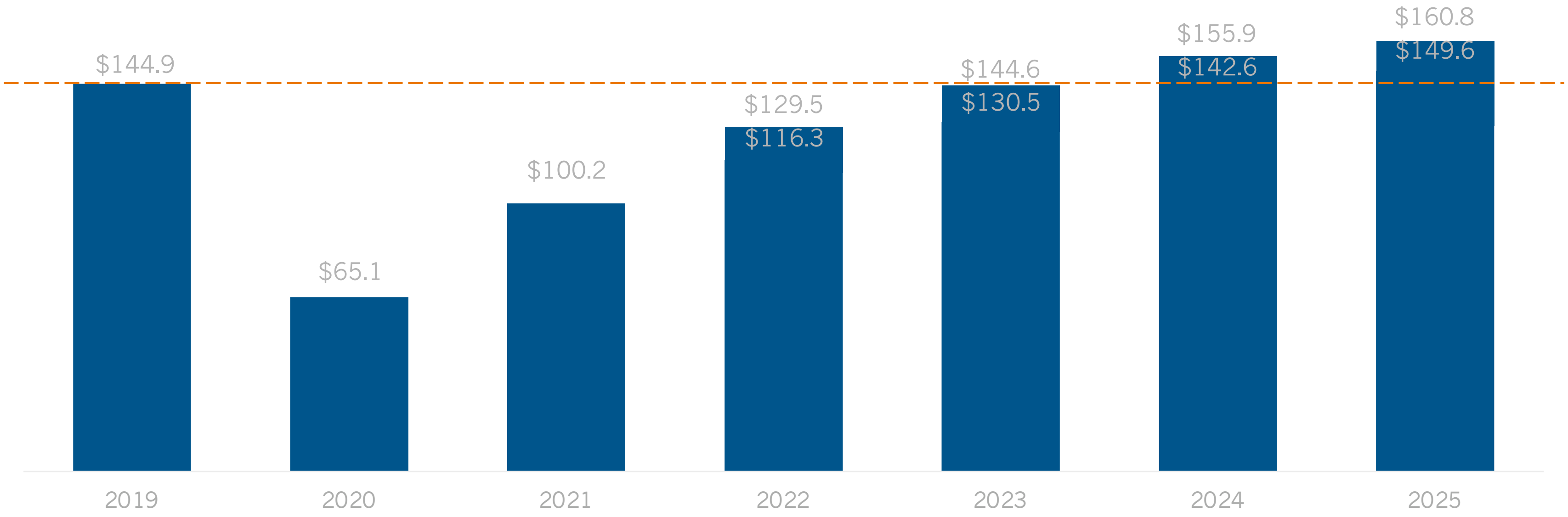
Tourism Employment
927K

State & Local Tax Revenue
$9.8B

Los Angeles County Economic Impact

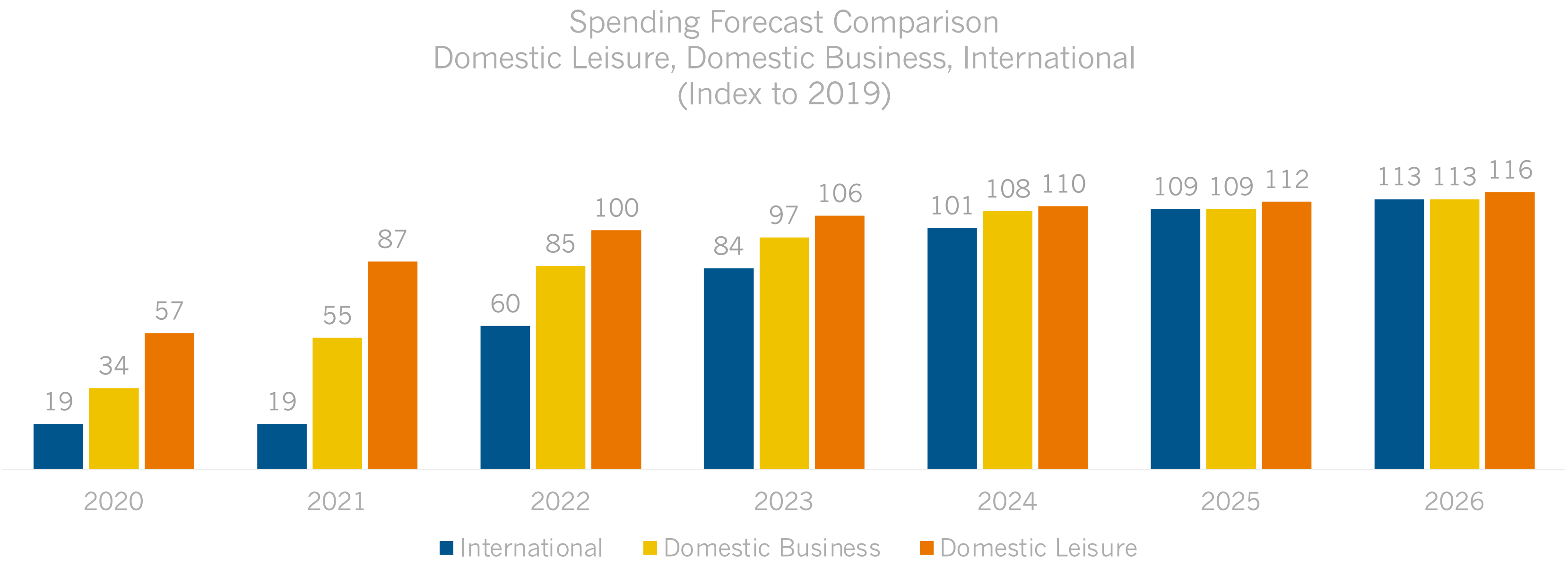
		Change since	
	2021	2020	2019
Visitor Spending	$19.6 B	+47.8%	-40%
Tax Revenue	$2.3 B	+26.5%	-24.5%

Travel Spending Forecast



Source: Tourism Economics, January 2022 Forecast

Forecast Recovery by Key Sector



Source: Tourism Economics, January 2022 Forecast

May is California Tourism Month

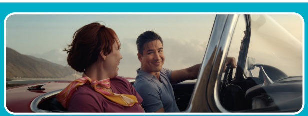
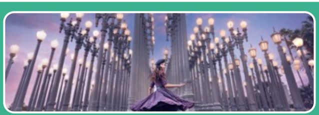
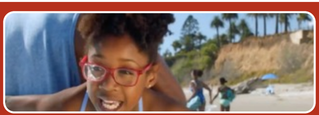
- Industry toolkit
- Statewide speaking tour
- Media outreach

industry.VisitCalifornia.com

#CATourism.com

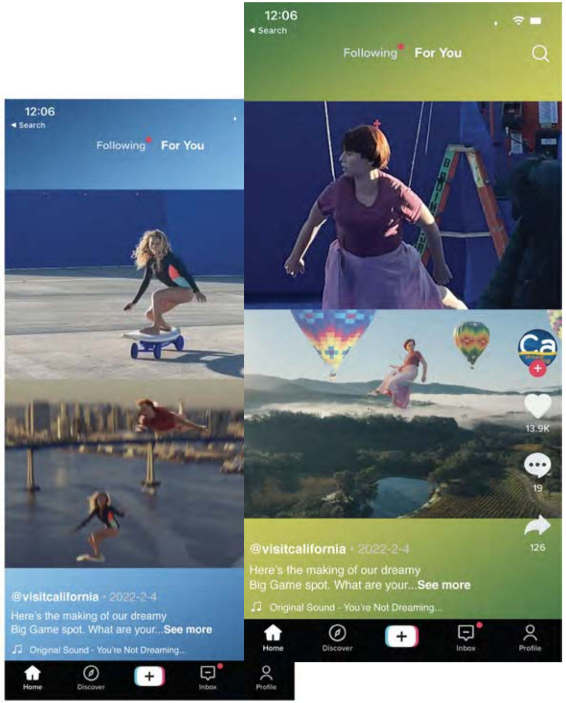

Accelerating Recovery

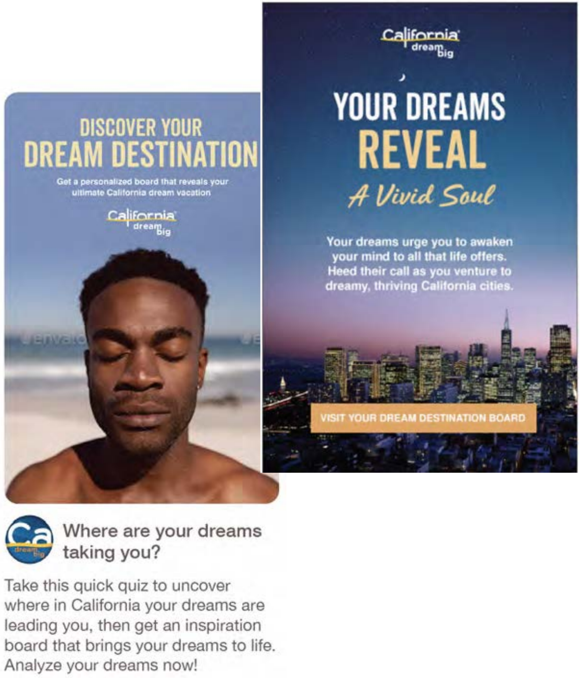
DRIVING CALIFORNIA DEMAND

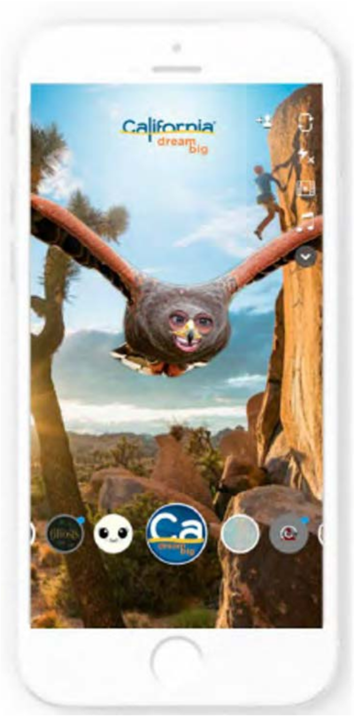
EXTENDED	1		Calling All Californians	$ 10,736,525
EXTENDED	2		California Road Trip Republic	$ 10,415,000
EXTENDED	3		Am I Dreaming	$ 41,050,000
EXTENDED	4		'Always On' Search and Content Distribution	$ 3,000,000
NEW	5		Urban Core Programming	$ 6,600,000
NEW	6		Kidifornia/Snow (Family)	$ 17,560,000
NEW	7		Culinary	$ 250,000
NEW	8		Business/Group Travel	$ 4,500,000
			Contingency	$ 888,475

‘Am I Dreaming?’

“Am I Dreaming” Platform Creative







KIDIFORNIA

Urban Core Programming


Collaborating with
Visit California


17,000+ Partner Handoffs
400,000+ Website Pageviews
59 Social Media Posts

THE CALIFORNIA QUESTIONNAIRE

Ayesha Curry

WE ASKED AYESHA TO DIVULGE A FEW OF HER GOLDEN STATE FAVORITES—HERE'S WHAT SHE TOLD US

Where do you live? The Bay Area

Why there? Initially it was because Steph was drafted here in 2009. But if you were to ask us now, we don't want to live anywhere else—we love it here. I love that I can go two hours in any direction and find the beach or the mountains or snow. It's all there.

Who or what is your greatest California love? Wunderlich County Park in Woodside. It's what I think of when I think of nature. It's amazing.

What is the biggest misperception about Californians? That we all surf. I didn't take lessons; I took a lesson. Terrible. I'm going to try again.

Proper Hotel Santa Monica

What is the stereotype that most holds true? People think that we're friendly. And I think another stereotype about California that holds true is that you don't have to pay extra for avocados or guac. Go to the East Coast and it's like $3 extra.

What is your favorite Golden State splurge? Dungeness crab

Time for a road trip—where are you going? The drive from the Bay Area to L.A. Head south down U.S 101 to see all the cattle and pass by the cherry and peach farms. We did it once and took the top down and it was just such a special drive. Then we went to Malibu and drove up the Pacific Coast Highway to return home. I love just finding a random stopping point to watch the waves and sit on the rocks. This is going to be stereotypical: I love Nobu Malibu. The waves are so loud. The sunsets are beautiful. I can't get enough. And I'd stay at any of the Proper Hotels. The Proper in Santa Monica is my favorite. That would be a fun, fun drive.

If you could decree an official state culinary experience, what would it be? California being a melting pot was the inspiration for my restaurant with Michael Mina, International Smoke. And the idea was to focus on his global grilling experience, where you could feel like you had your passport stamped in every country without ever leaving California. I would make that the official state culinary experience—have our Korean ribs, have our St. Louis ribs, have our California style seafood platter.

What does sustainability mean to you? I love this planet and I want it to be here for my kids and my children's children and their children. And I'm well aware of the global crisis that we're in right now, when it comes to making sure that we keep this earth a beautiful place. But the truth of the matter... is that it's something that I'm still learning how to implement into my life. It's a learning process. Taking one small step is doing your part, like using a recyclable straw. A small step like that, is like, thank you for doing something.

Where would you go for the ultimate shopping spree? The McMullen boutique in Oakland. Sherri McMullen has this premier boutique that offers luxury brands and very bespoke things. And—if I'm allowed to mention it—I have a boutique in Oakland called Sweet July and we have the most amazing coffee and bread pudding and homewares and self-care items.

Best California song? "Malibu" by Miley Cyrus. It's a great driving song. It puts me in that zone, even if I'm not driving. I feel the wind in my hair. For some reason, I can now smell saltwater. That's how it makes me feel. And it's just a romantic song because California's romantic.

How would your California dream day unfold? I think the perfect California day is waking up to the most beautiful sunshine in the morning. The whole family will stay in their pajamas later than we should, opening all the curtains and the windows, letting in the fresh air. Then we make the most perfect cast-iron pancakes and epic almond-milk latte. Then maybe we slow roll it to our nearest park and watch the kids play and have, you know, a cooler cup that has something other than water in it. Nobody has to know. These days it's probably a gin and tonic. And then we will have a picnic lunch. Then I think we take it back home and make a nice dinner and eat it outside. That is what I love about living here. I can dine alfresco year-round.

International Smoke Bao Buns

21

ACADEMY MUSEUM OF MOTION PICTURES

Visit this new L.A. landmark to see rare artifacts such as *The Wizard of Oz* ruby slippers and Gregory Peck's working script from *To Kill a Mockingbird*. Don't miss the Oscars Experience, where you can create a video of yourself accepting an Academy Award.

22

SOFI STADIUM

With a translucent curved roof and a 120-yard-long videoboard, the host stadium of Super Bowl LVI may be the most advanced sports facility ever built. Plus: Award-winning chefs created the culinary program. Book a tour to learn more about where the NFL's Chargers and Rams play.

23

ANGELENO WINE COMPANY

Sourcing grapes from organic vineyards in L.A. County, this winery has resurrected the local winemaking tradition that dates to 1833. Come here to discover unique Spanish varietals such as Graciano, Alicante Bouschet, and Verdejo that reflect L.A.'s surprisingly diverse terroir.

Lake Hollywood

Vasquez Rocks

24 ANNENBERG COMMUNITY BEACH HOUSE

If you've ever longed for your own Southern California beach house, head to this Santa Monica property for a taste of the luxe life. Built in the 1920s by William Randolph Hearst for his paramour Marion Davies, the five-acre estate lets you experience sophisticated living. Hang by the pool, take yoga, or maybe test your beach volleyball skills. There's also an art gallery, and docents lead tours of the Marion Davies Guest House.

Eames House

25 THE FORD

While almost everyone knows the fabled Hollywood Bowl, there's another outdoor venue that even many longtime Angelenos have never visited. During its long history, The Ford, an intimate 1,200-seat theater tucked into the Hollywood Hills, has hosted everyone from violinist Jascha Heifetz to The Ramones. That diverse tradition continues today with an innovative calendar that recently featured Rock and Roll Hall of Famer Patti Smith, Japanese taiko drumming, and Mexican folk dance.

26 LAKE HOLLYWOOD

The most distinctive view of the Hollywood Sign isn't necessarily the closest. Nor does it particularly resemble Hollywood. Instead, follow the 3.5-mile walking trail around Lake Hollywood to the landmark 1924 Mulholland Dam and you'll look out across the reservoir to a wooded shoreline and the sign high up on Mount Lee. Expect your friends to ask you how you found this angle. And as a bonus, the view from the dam overlooking the city is almost as spectacular.

27 MOUNT WILSON OBSERVATORY

High above Pasadena, Mount Wilson Observatory looks out over L.A. and into the universe. Self-guided tours explore this complex that opened in 1904, and docents lead in-depth weekend tours that give you the chance to see the observatory's famous 100-inch telescope up close. Astronomers also lead sessions that allow visitors to gaze into the cosmos through the observatory's telescopes—the largest in the world available for public use.

28 VASQUEZ ROCKS NATURAL AREA

Back in the Old West, if you needed to hide out, these dramatic sandstone formations—about 20 miles northeast of Santa Clarita—would have looked inviting. In fact, legendary desperado Tiburcio Vasquez, for whom the rocks are named, did escape the law here. These days, it's a popular filming location and a great place to explore trails or scramble up the outcroppings for a panorama.

29 MORRISON HOTEL GALLERY

Home to such landmarks as The Troubador and The Roxy, West Hollywood has been the epicenter of Southern California's music scene for generations. If you're looking for a piece of rock history, stop into the Morrison Hotel Gallery for vintage images of legends from Bruce Springsteen to Buffalo Springfield. It's in the Sunset Marquis, which displays music-themed photos curated by the gallery.

30 MODERNIST HOUSE TOURS

Get an intimate look at a mid-century modern masterpiece: The Eames House in Pacific Palisades has self-guided exterior tours and also offers private visits of the ground floor. Docents are available to offer details about the glass-and-steel 1949 house and its designers, Charles and Ray Eames, who lived here for decades. You'll also be able to peek through the windows to see the house's Eames-designed furniture.

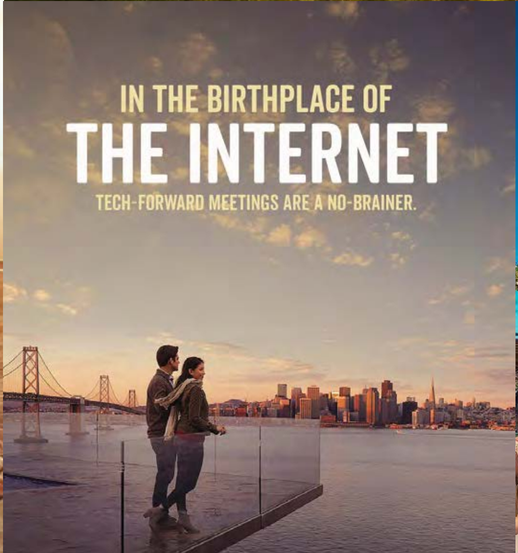
Restoring Group Travel

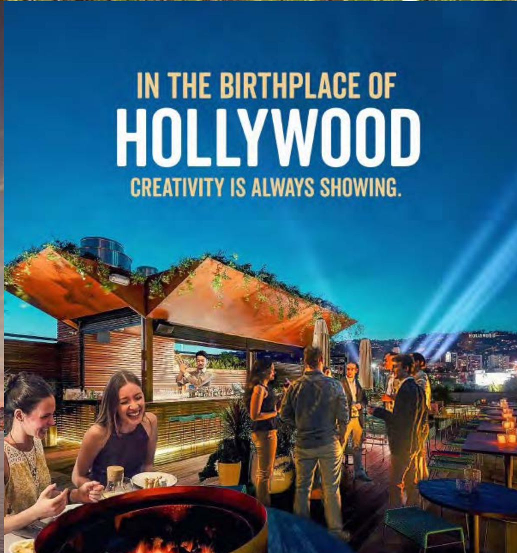
‘The Birthplace’ Campaign


IN THE BIRTHPLACE OF
BLUE JEANS
RELAXED AND COMFORTABLE MEETINGS
ARE JUST THE RIGHT FIT.

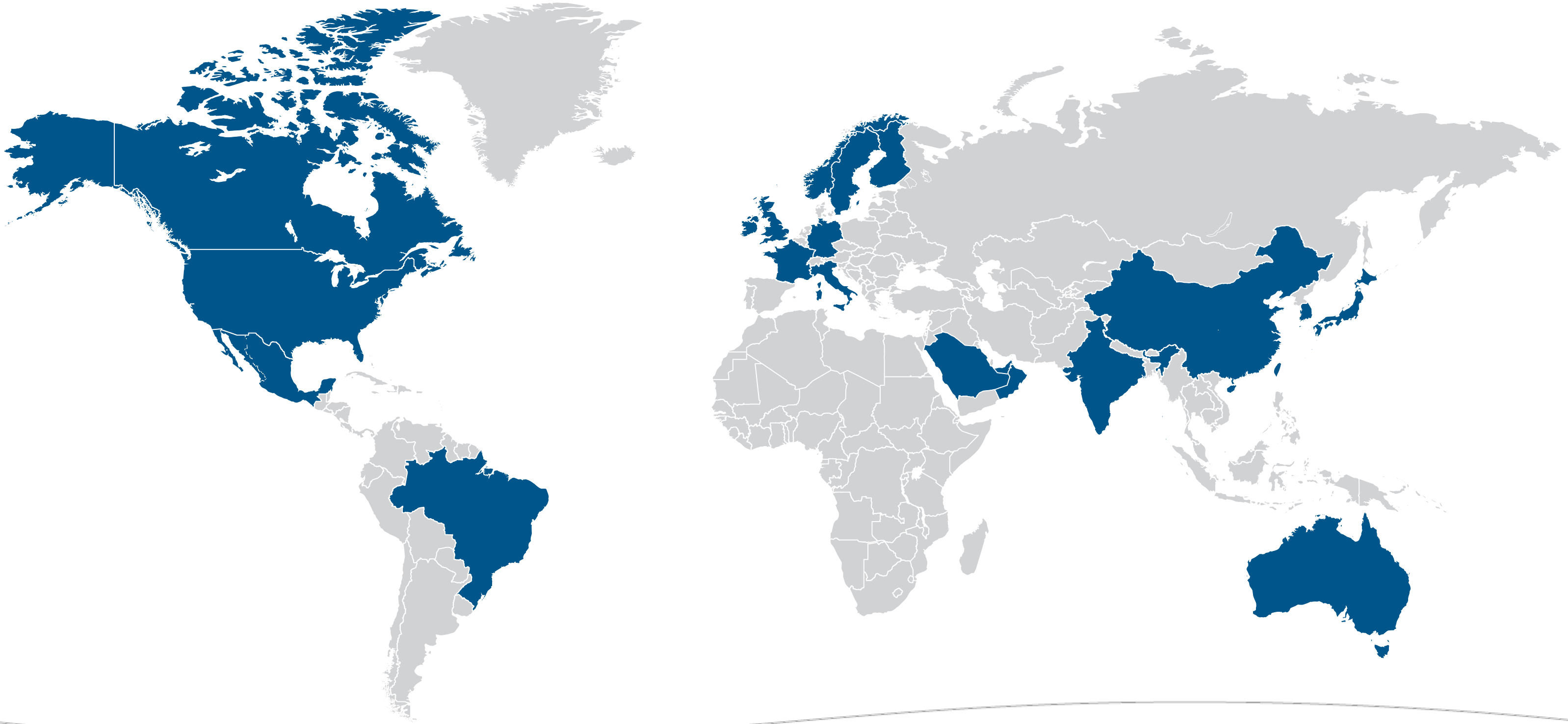

IN THE BIRTHPLACE OF THE
GREEN MOVEMENT
ECO-FRIENDLY MEETINGS COME NATURALLY.


IN THE BIRTHPLACE OF
STATE PARKS
OUTDOOR MEETINGS ARE ALWAYS IN.


IN THE BIRTHPLACE OF
THE INTERNET
TECH-FORWARD MEETINGS ARE A NO-BRAINER.


IN THE BIRTHPLACE OF
HOLLYWOOD
CREATIVITY IS ALWAYS SHOWING.

Global Investments and Opportunities



Resources

industry.VisitCalifornia.com

Thank You!

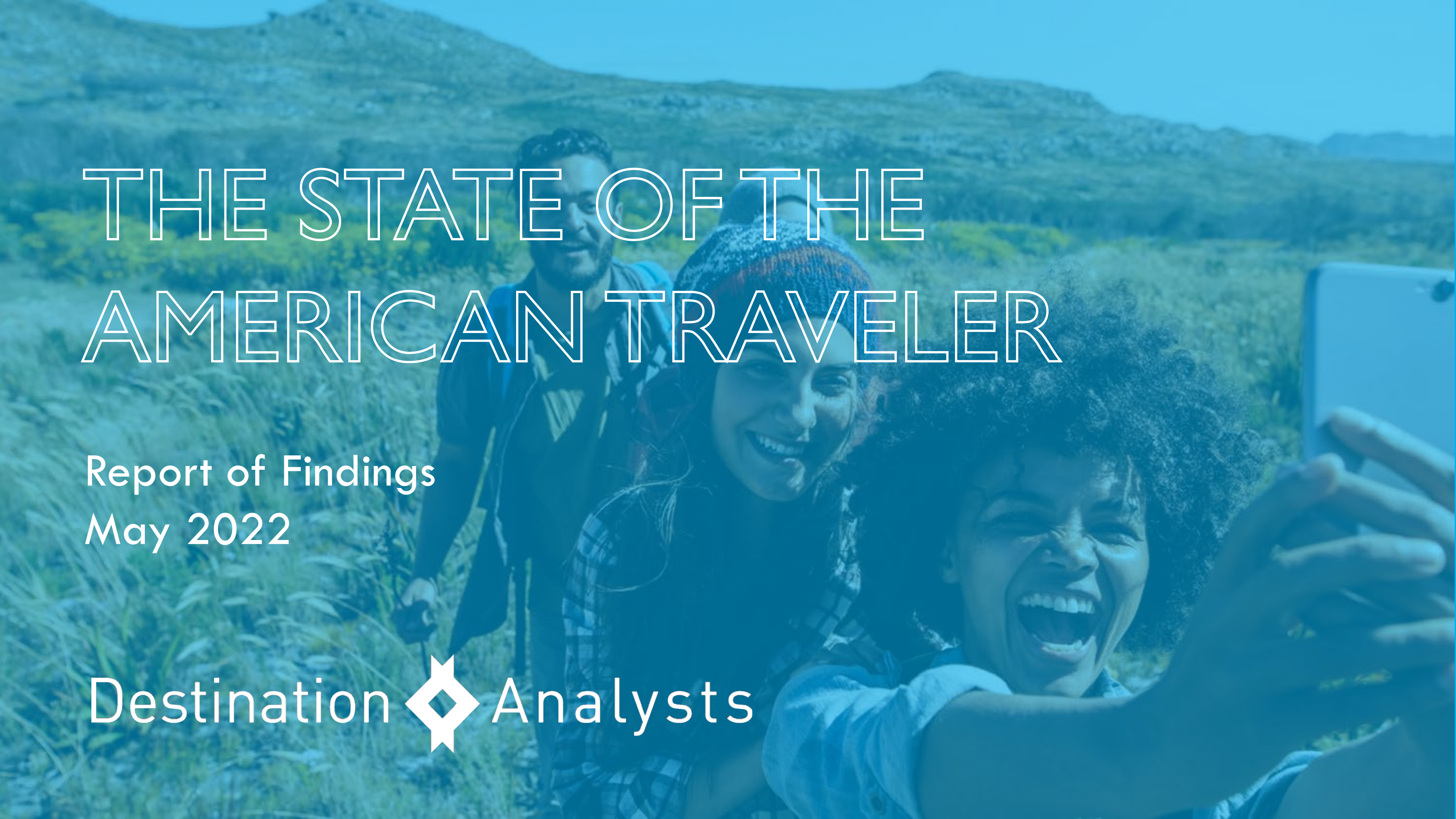
THANK YOU

Caroline Beteta

SANTA MONICA
TRAVEL & TOURISM

ERIN FRANCIS-CUMMINGS

President & CEO
Destination Analytics



THE STATE OF THE AMERICAN TRAVELER

Report of Findings
May 2022

Destination Analysts

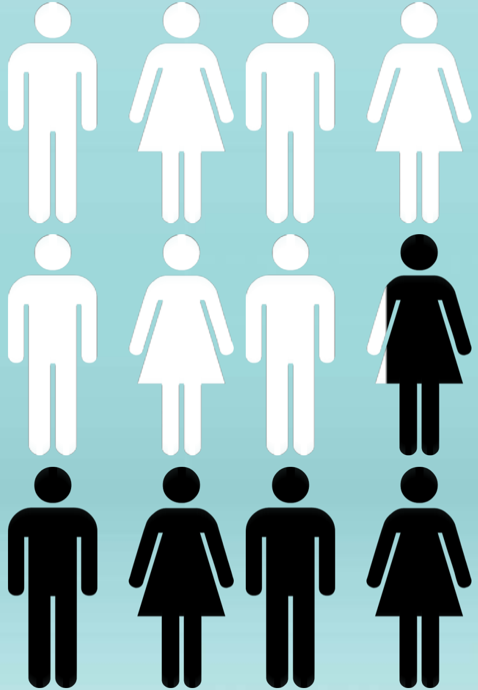

Destination Analysts

Agenda

- Economic Considerations
- The Pandemic
- Sentiment Towards Travel & Travel Outlook
- Travel Attitudes & Preferences
- How We Have Changed
- The International Outlook

IMPACT OF INFLATION ON TRAVEL

EXPECTATIONS FOR THE ECONOMY



59.0% of American travelers believe it is likely an economic recession will begin in the U.S. this year.

Just **27.8%** believe inflation will weaken this year and just **24.2%** believe the U.S. will experience strong economic growth.

INFLATION & TRIP CANCELLATION

23.2%

of American Travelers Agree that recent inflation in consumer prices has led them to cancel an upcoming trip.

IMPACT OF GASOLINE PRICES ON ROAD TRIPS

58.0%

of American travelers agree that if gasoline prices don't come down, they will be taking fewer road trips this spring/summer.

IMPACT OF GASOLINE PRICES ON TRIP DISTANCE

60.4%

of American travelers agree that if gasoline prices don't come down, they will be staying closer to home on my road trips this spring/summer.

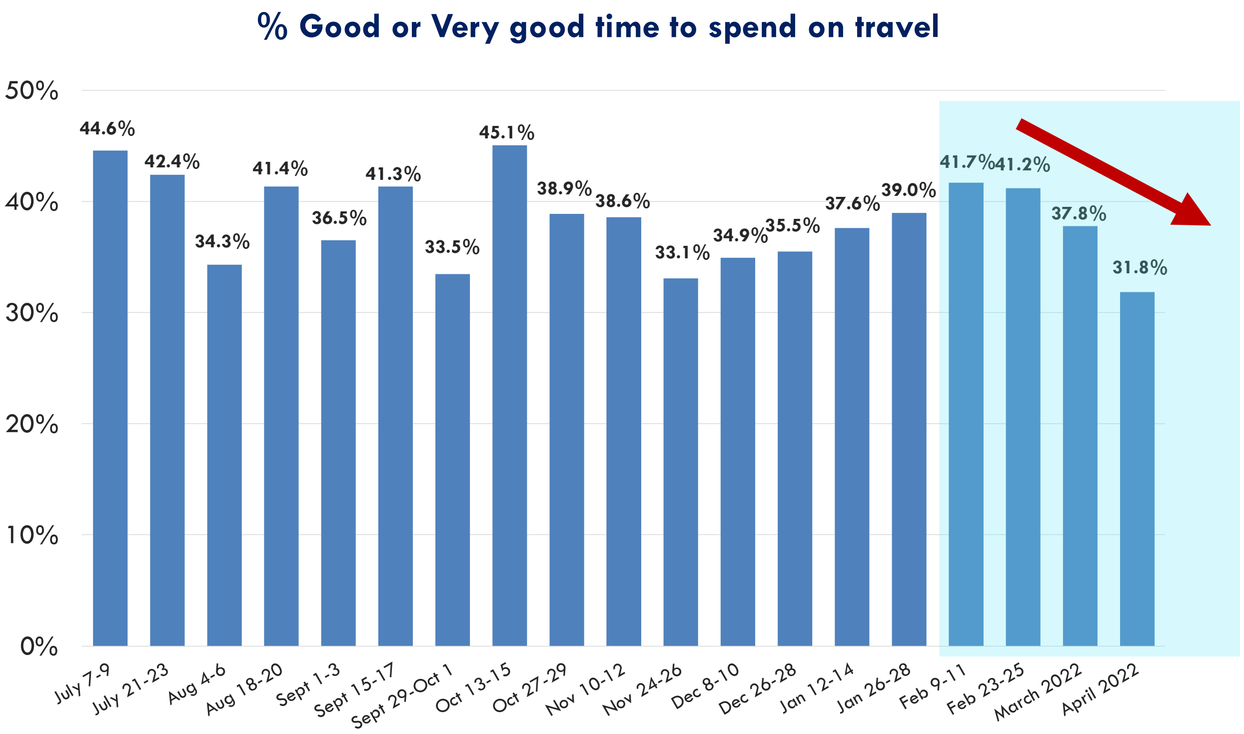
TRAVEL PRICES AS AN IMPEDIMENT TO TRAVEL

38.3%

of American travelers agree high travel prices have kept them from traveling in the past month.

IS IT A GOOD TIME TO SPEND ON TRAVEL?

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel? (Select one)

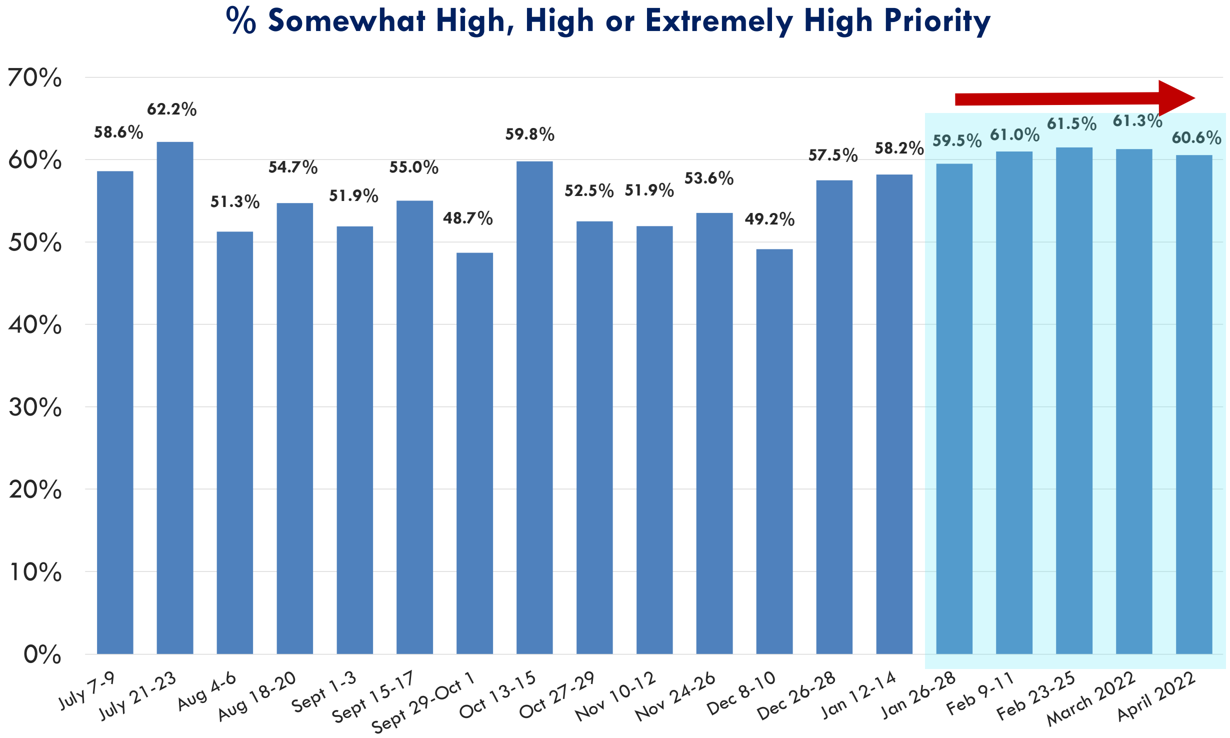


Destination Analysts

TRAVEL AS A BUDGET PRIORITY

Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. (Select one)

Leisure travel will be a(n) ________________.

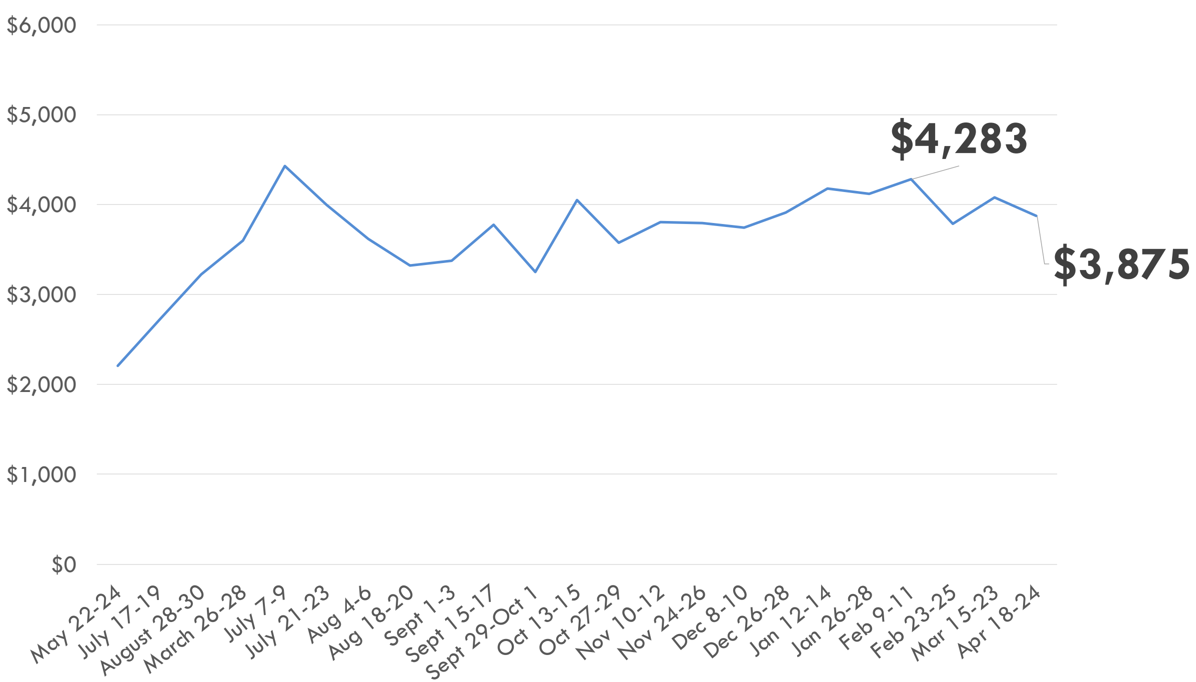


MAXIMUM TRAVEL SPENDING: NEXT 12 MONTHS

Question: **How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?**

Maximum I would spend on leisure travel (next 12 months):

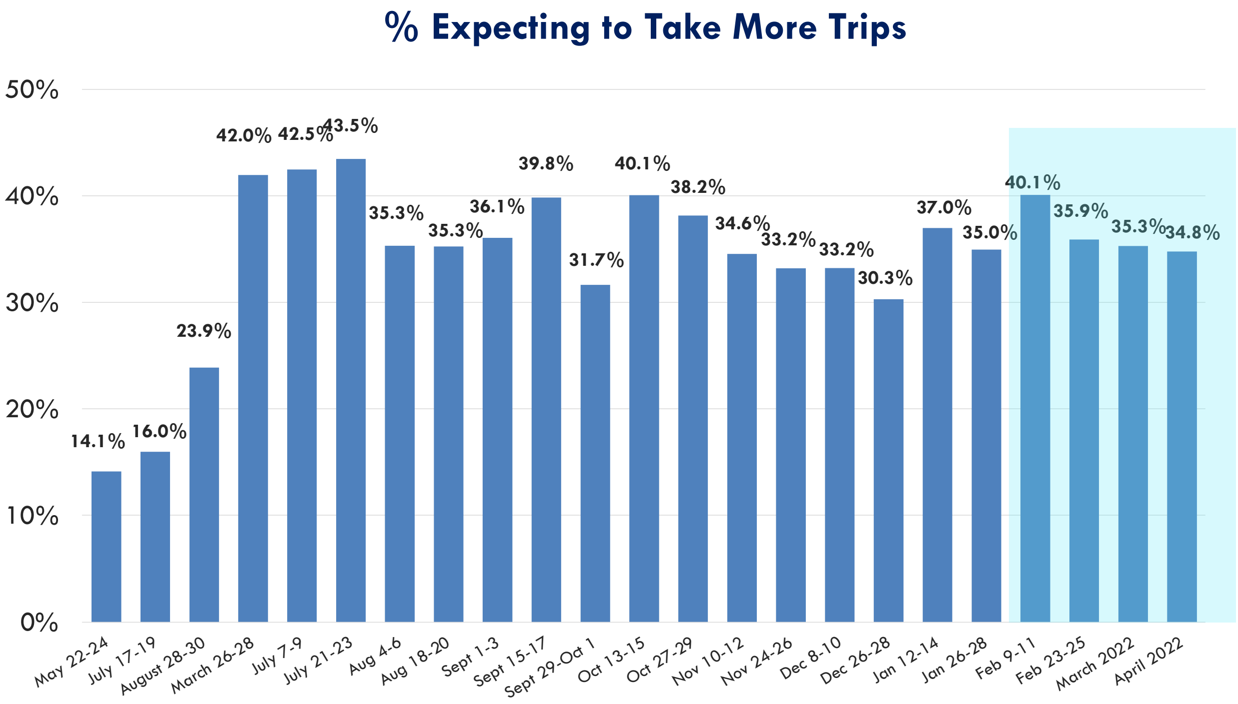
____



Destination Analysts

EXPECTATIONS FOR TRAVEL (NEXT 12 MONTHS)

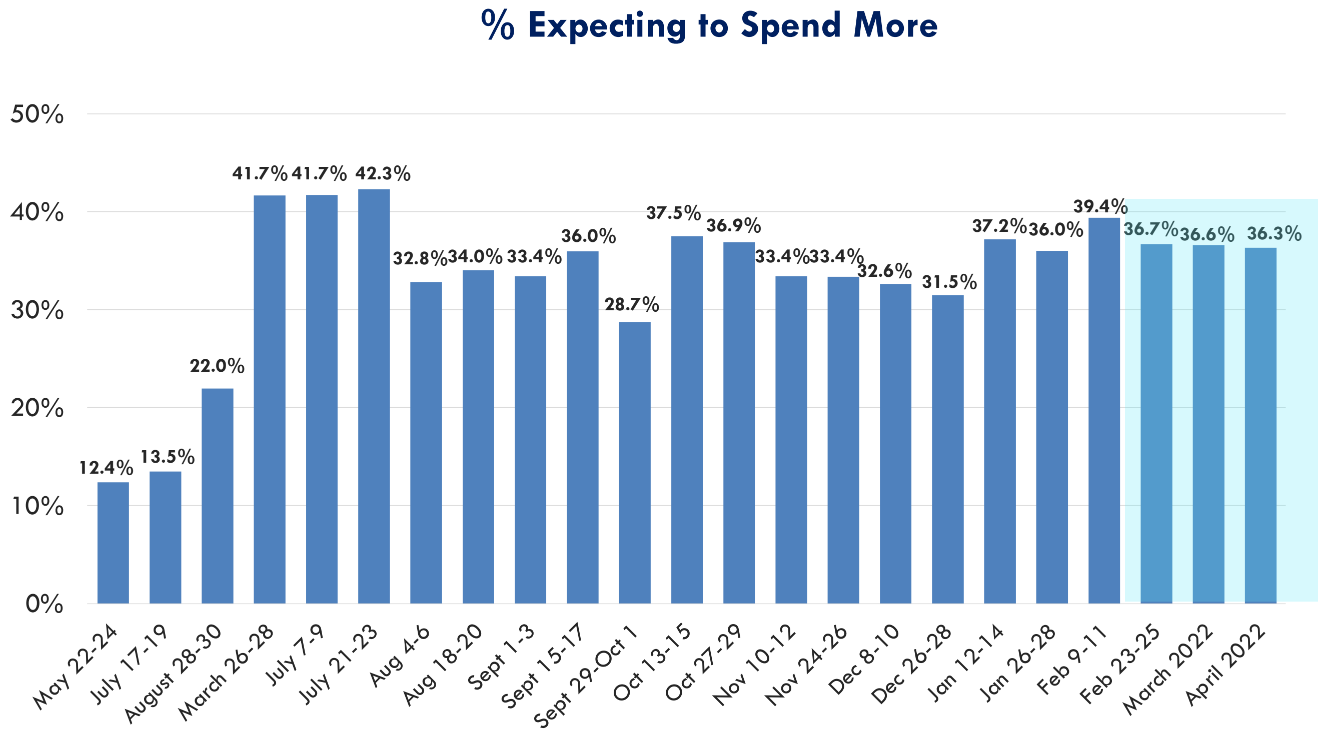
Question: In the NEXT 12 MONTHS, do you expect to travel more or less for leisure than you did in the most recent 12-month period? (Select one)



Destination Analysts

EXPECTATIONS FOR TRAVEL SPENDING (NEXT 12 MONTHS)

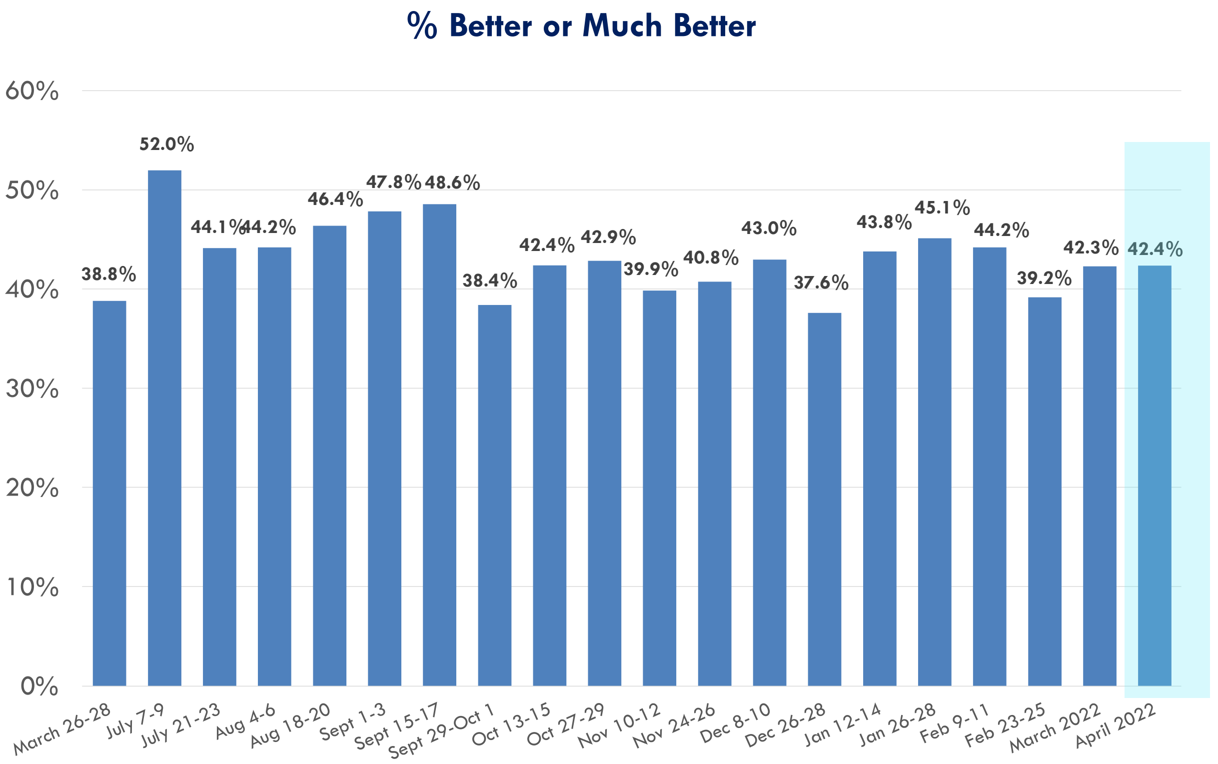
Question: In the NEXT 12 MONTHS, do you expect to spend more or less for leisure travel than you did in the most recent 12-month period? (Select one)



Destination Analysts

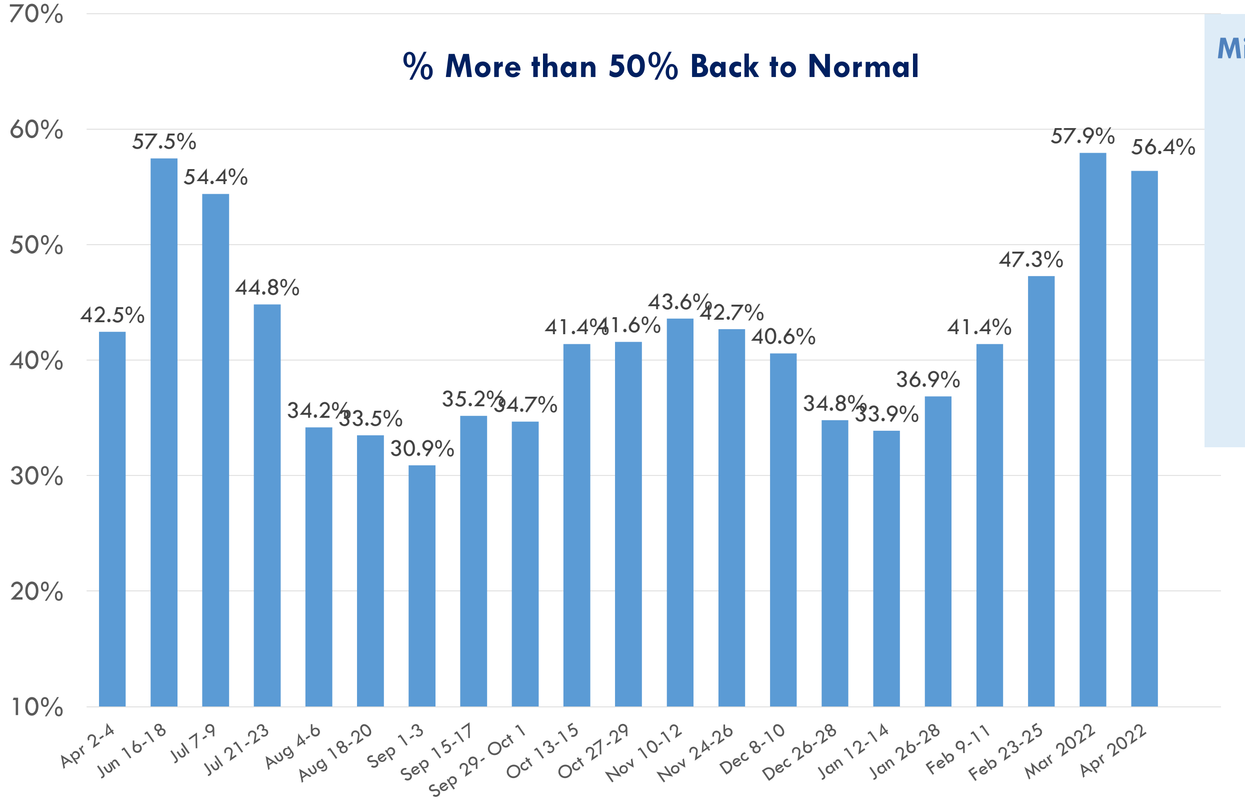
EXPECTATIONS FOR FUTURE FINANCES

Question: **LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now?**




Destination Analysts

RETURNING TO NORMAL



Millennial or younger
60.8%

Gen X
54.8%

Boomer or older
52.7%

WEST
56.7%

MIDWEST
54.6%

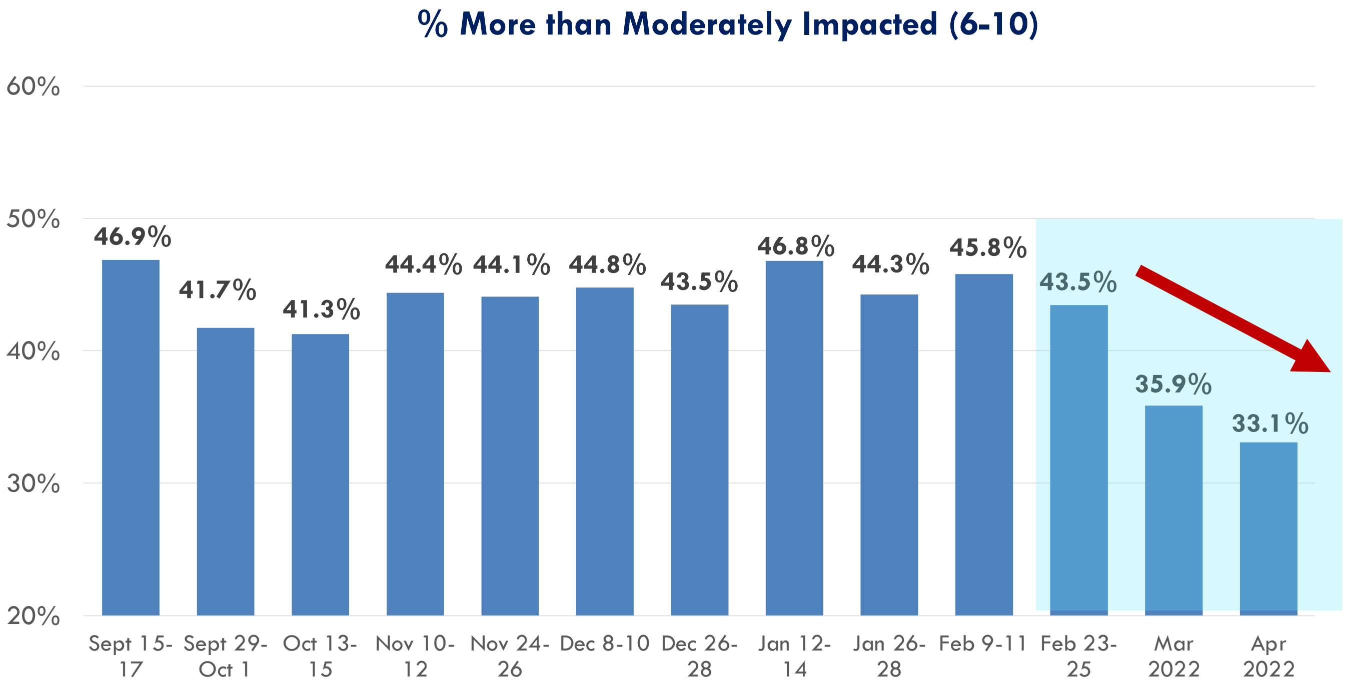
NORTHEAST
59.3%

SOUTH
54.3%

Question: Overall, how close to "normal" is the U.S. in terms of resuming leisure activities (dini

COVID-19'S IMPACT ON MEANINGFUL TRAVEL EXPERIENCES

Question: How much is the COVID-19 issue impacting your ability to have meaningful travel experiences? (Select one)

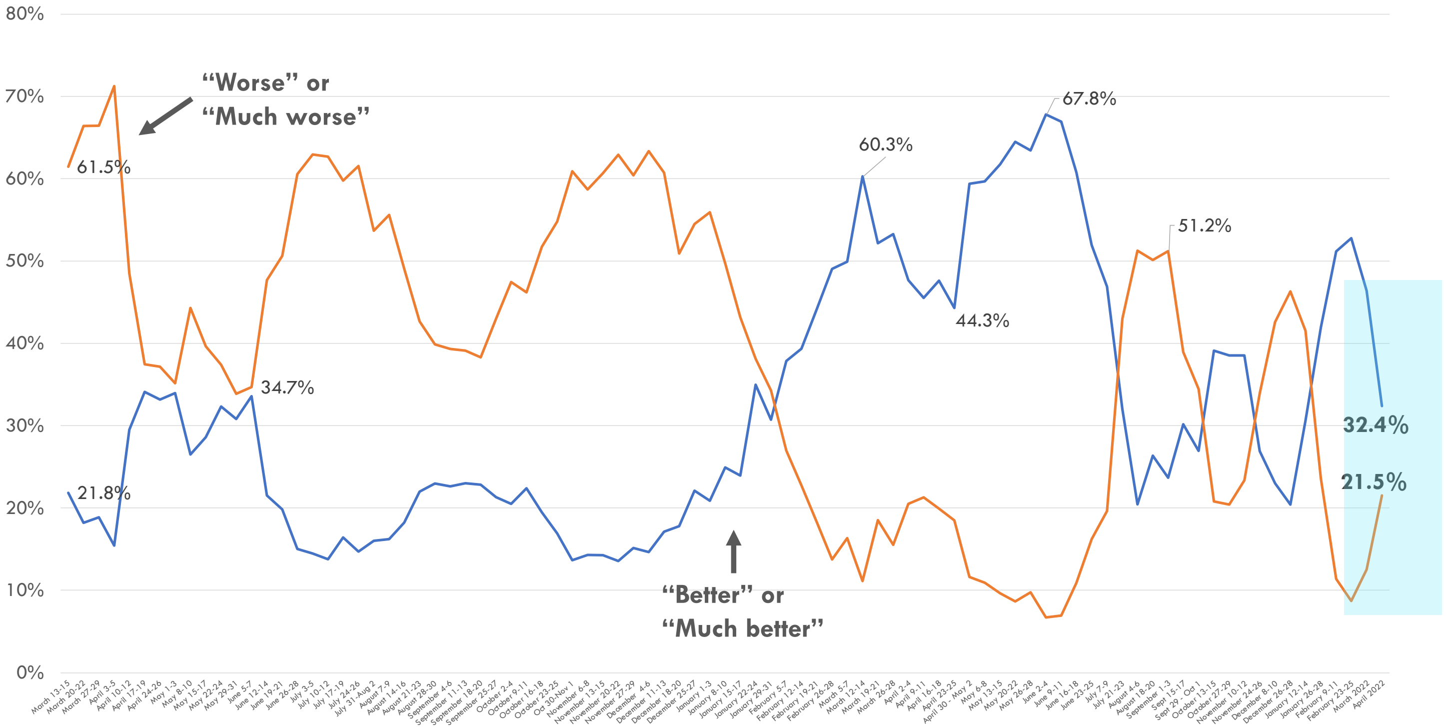


Destination Analysts

EXPECTATIONS FOR THE CORONAVIRUS OUTBREAK (MAR 2020 – APR 2022)

Question: **In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change?**

In the next month the coronavirus situation will get __________



(Base: All respondents, 1,200+ completed surveys each wave.)

Destination Analysts

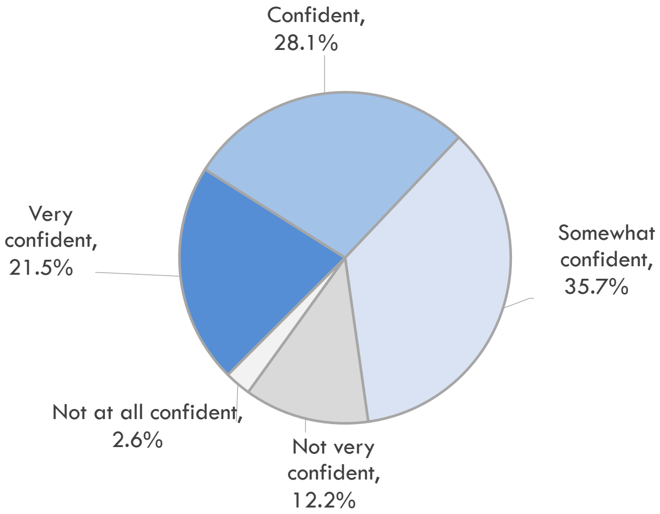
PANDEMIC EXPECTATIONS

45.8%

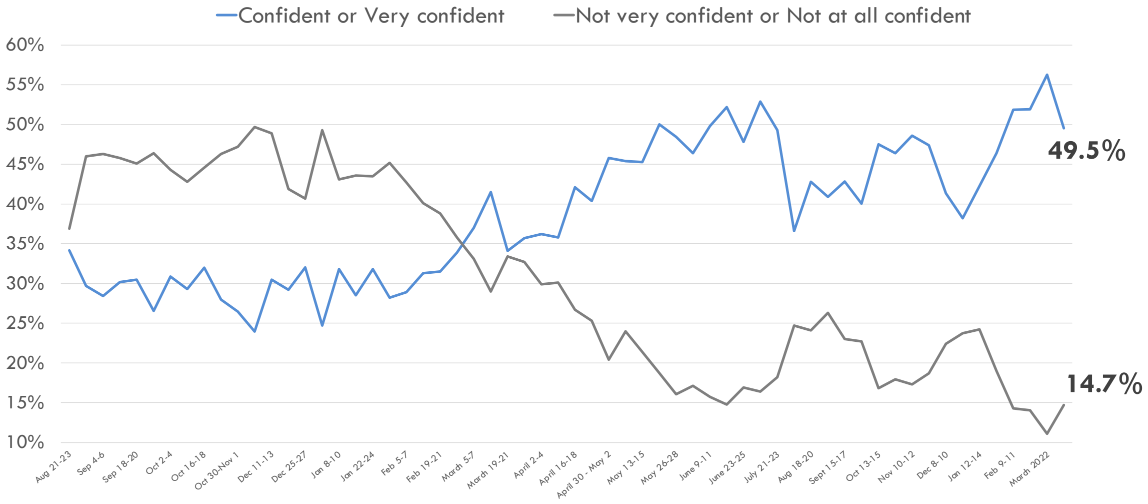
of American travelers feel it's likely a dangerous new variant of COVID-19 will emerge in the U.S. in the remainder of the year.

CONFIDENCE IN ABILITY TO TRAVEL SAFELY

Question: How confident are you that you can travel safely in the current environment?



Historical data



(Base: All respondents, 4,060 completed surveys.

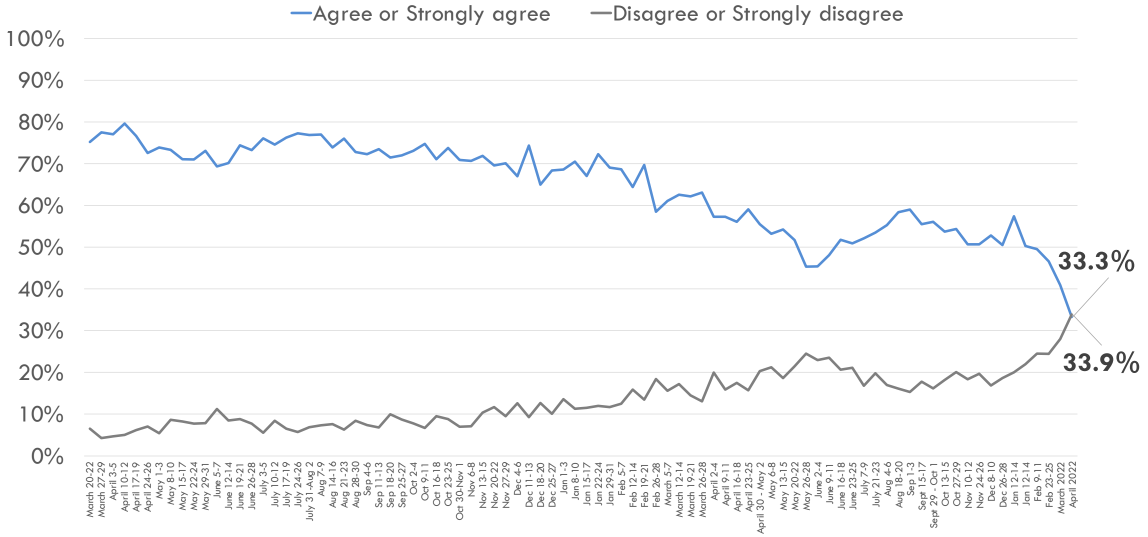
Data collected April 18-24, 2022.)

AVOIDING CONVENTIONS & CONFERENCES

How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.

Historical data

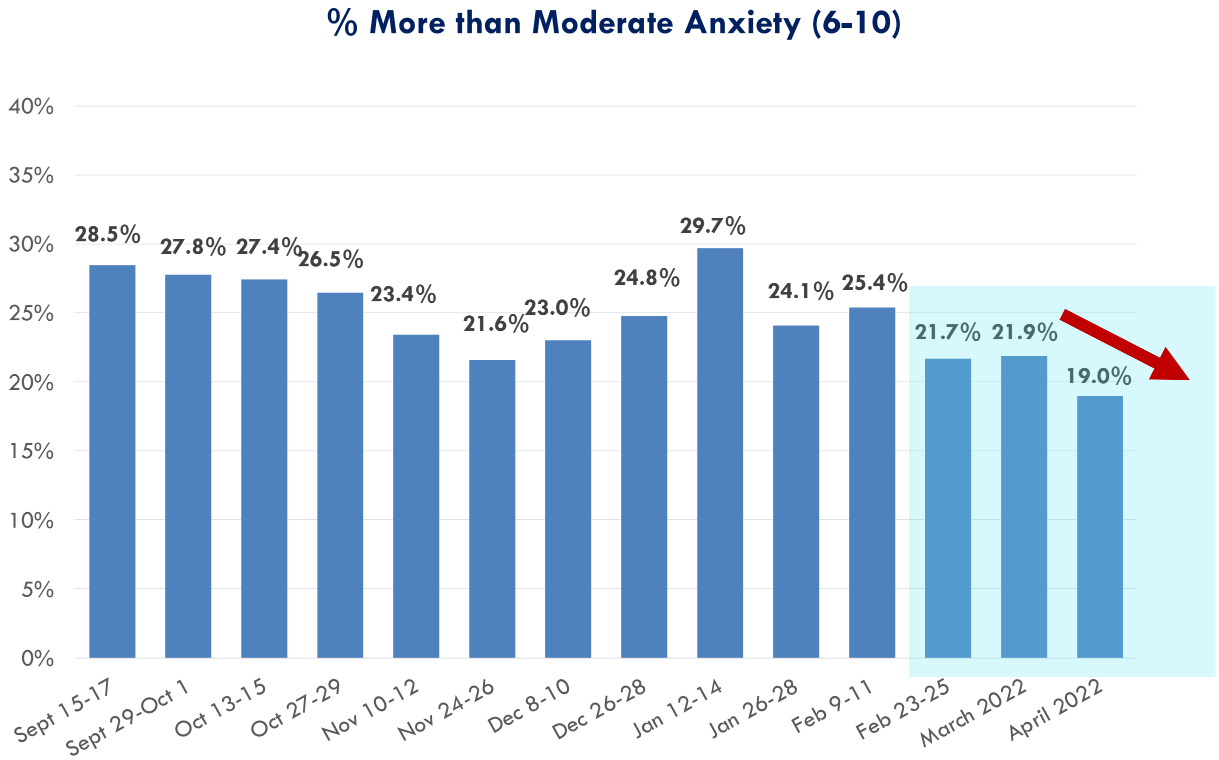


(Base: All respondents, 4,060 completed surveys.

Data collected April 18-24, 2022.)

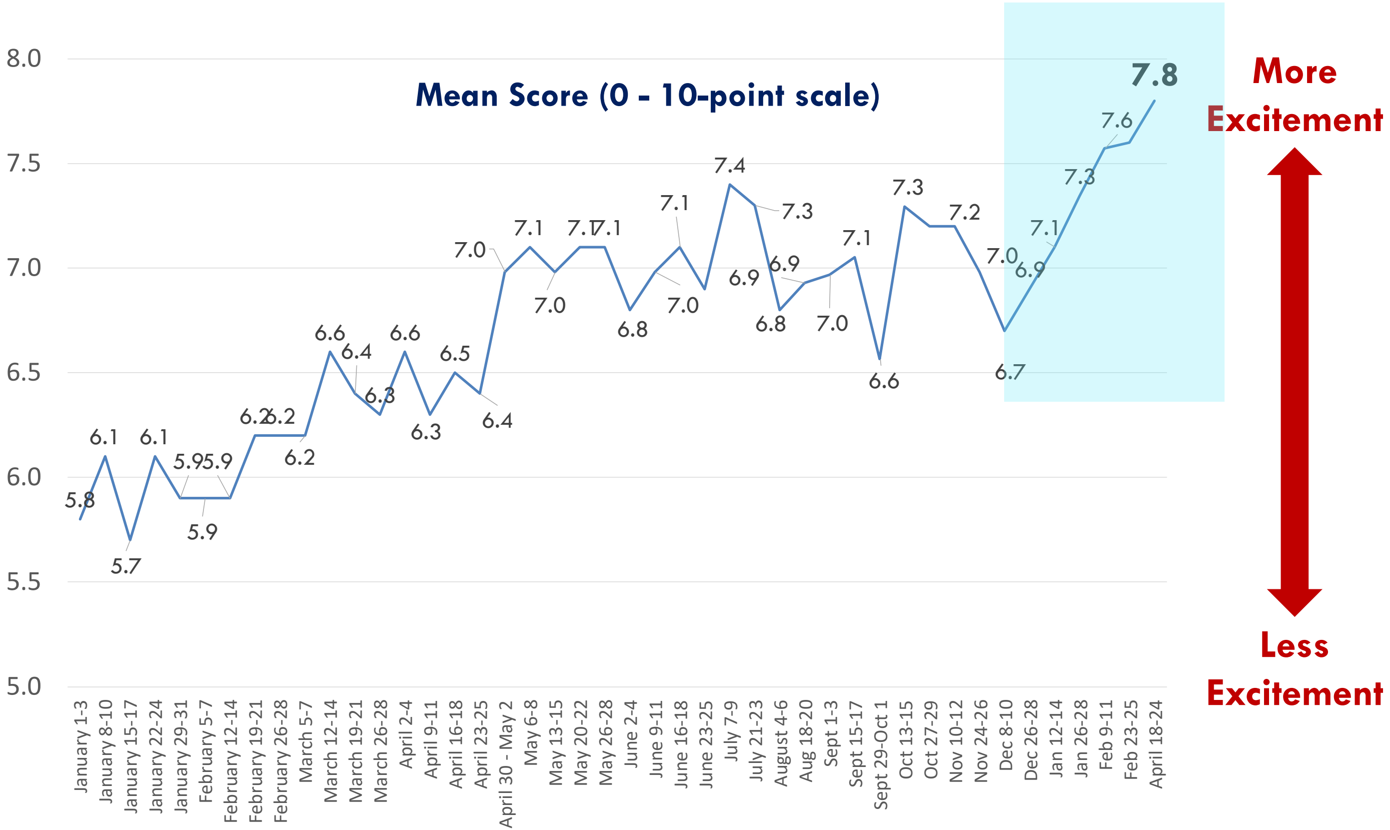
MOST RECENT OVERNIGHT TRIP: COVID-19 ANXIETY

Question: While traveling on your most recent overnight trip, HOW MUCH ANXIETY did you generally feel about the COVID-19 situation?



EXCITEMENT FOR LEISURE TRAVEL IN THE NEXT 12 MONTHS

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)

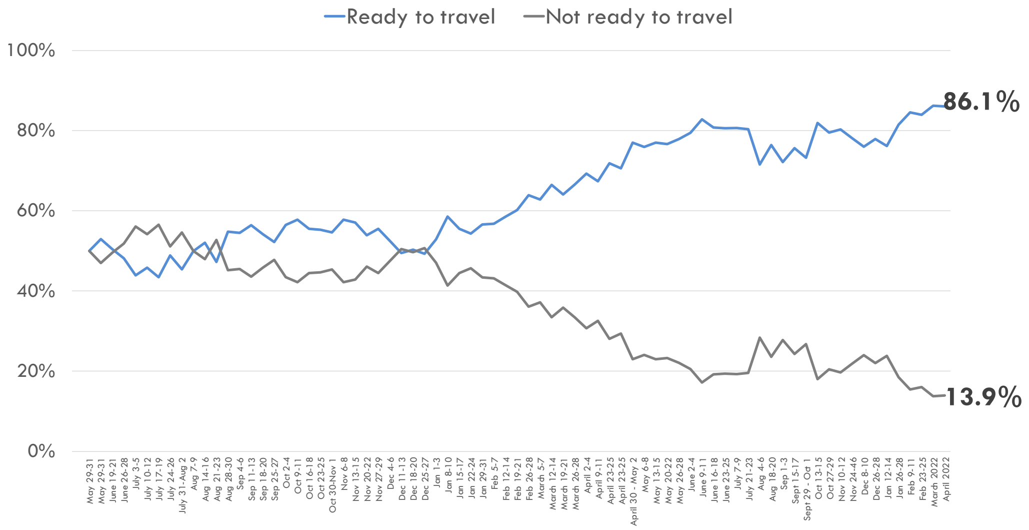


Destination Analysts

TRAVEL STATE-OF-MIND

Question: **When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)**

Historical data



(Base: All respondents, 4,060 completed surveys.

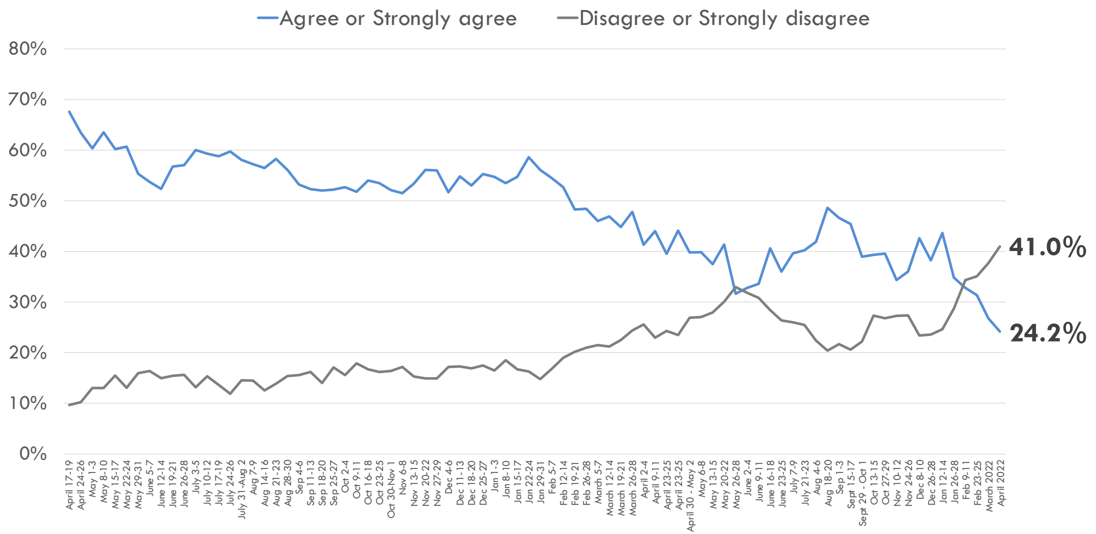
Data collected April 18-24, 2022.)

TRAVELERS IN COMMUNITY ARE UNWANTED

How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.

Historical data



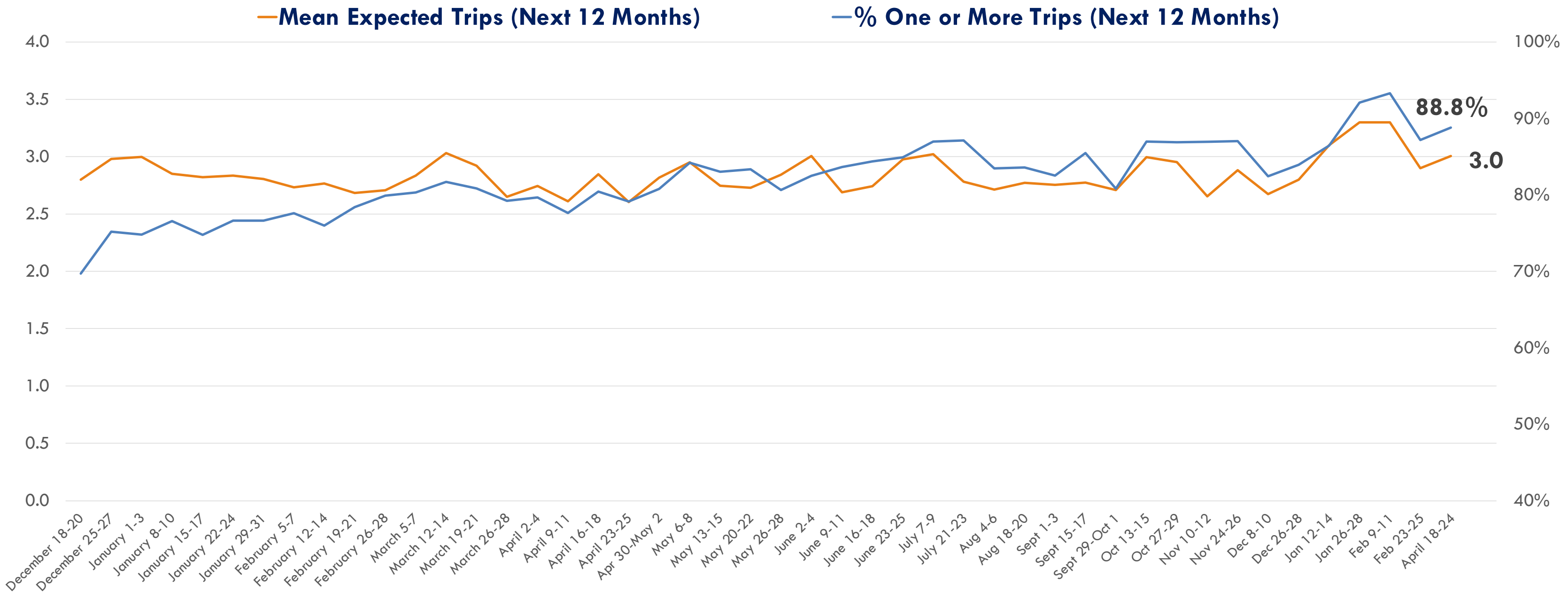
(Base: All respondents, 4,060 completed surveys.

Data collected April 18-24, 2022.)

Destination Analysts

NUMBER OF LEISURE TRIPS ANTICIPATED IN THE NEXT 12 MONTHS

Question: **IN TOTAL**, how many **leisure trips** (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one)



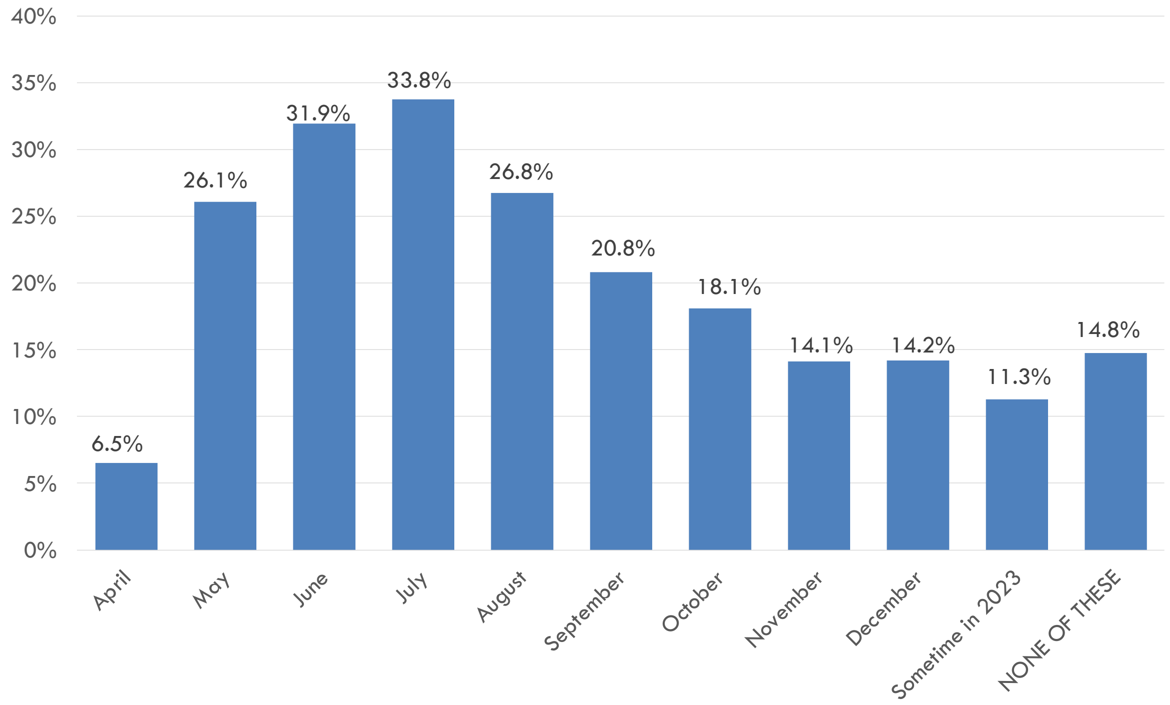
Destination Analysts

MONTHS OF EXPECTED LEISURE TRIPS IN 2022

Question: In which months do you currently have any leisure trips planned (even if only tentatively)? (Select all that apply)

(Base: All respondents, 4,060 completed surveys.

Data collected April 18-24, 2022)

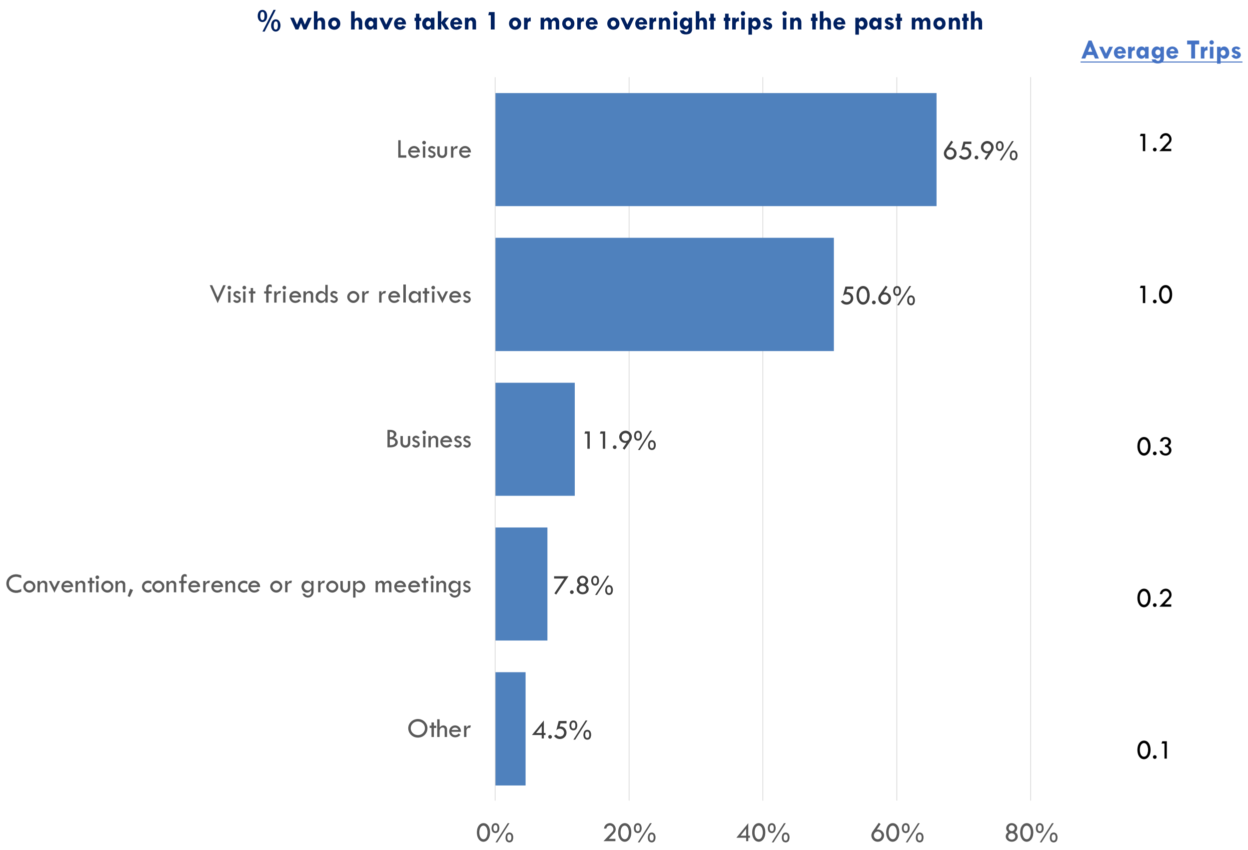


Destination Analysts

EXPECTED TRIPS IN THE NEXT THREE MONTHS: BY TRIP TYPE

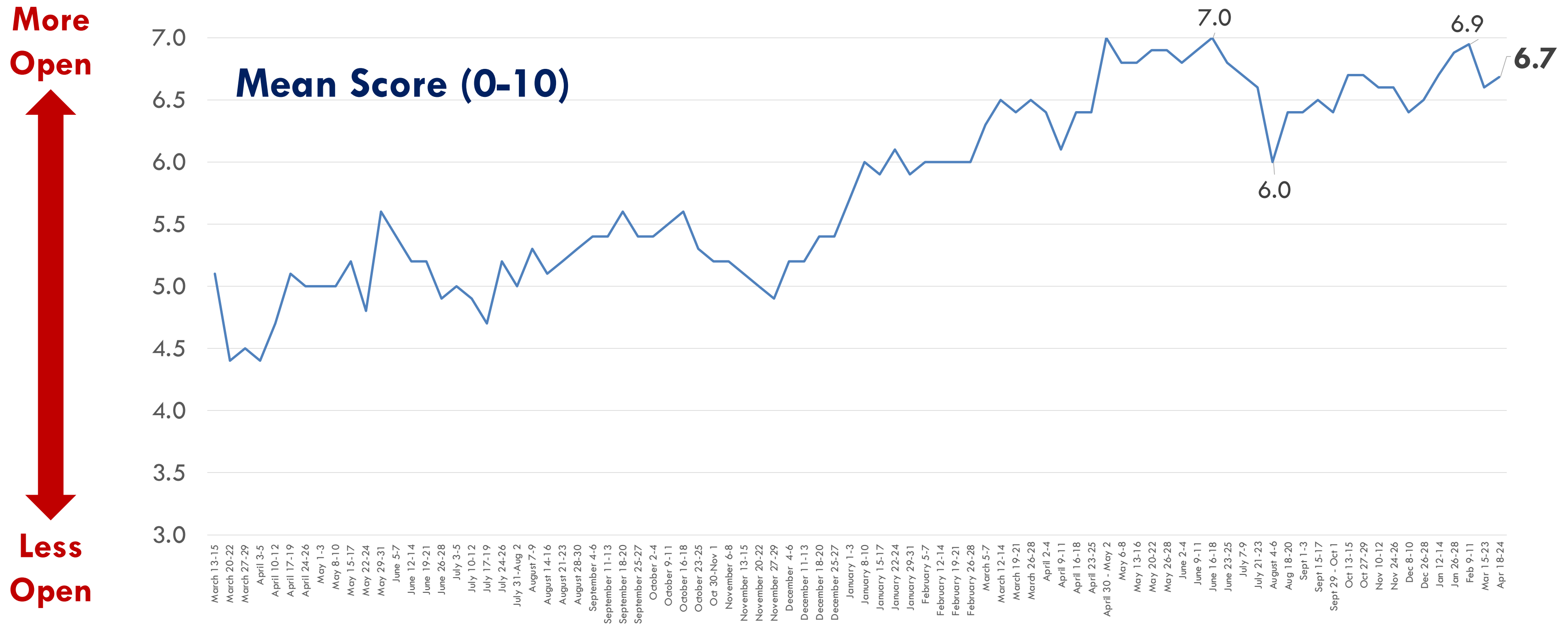
Question: In the NEXT THREE (3) MONTHS, how many of each type of trip are you likely to take? (Select the correct number of each trip type)

(Base:. All respondents, 4,060 completed surveys. Data collected April 18-24, 2022)



OPENNESS TO TRAVEL INSPIRATION

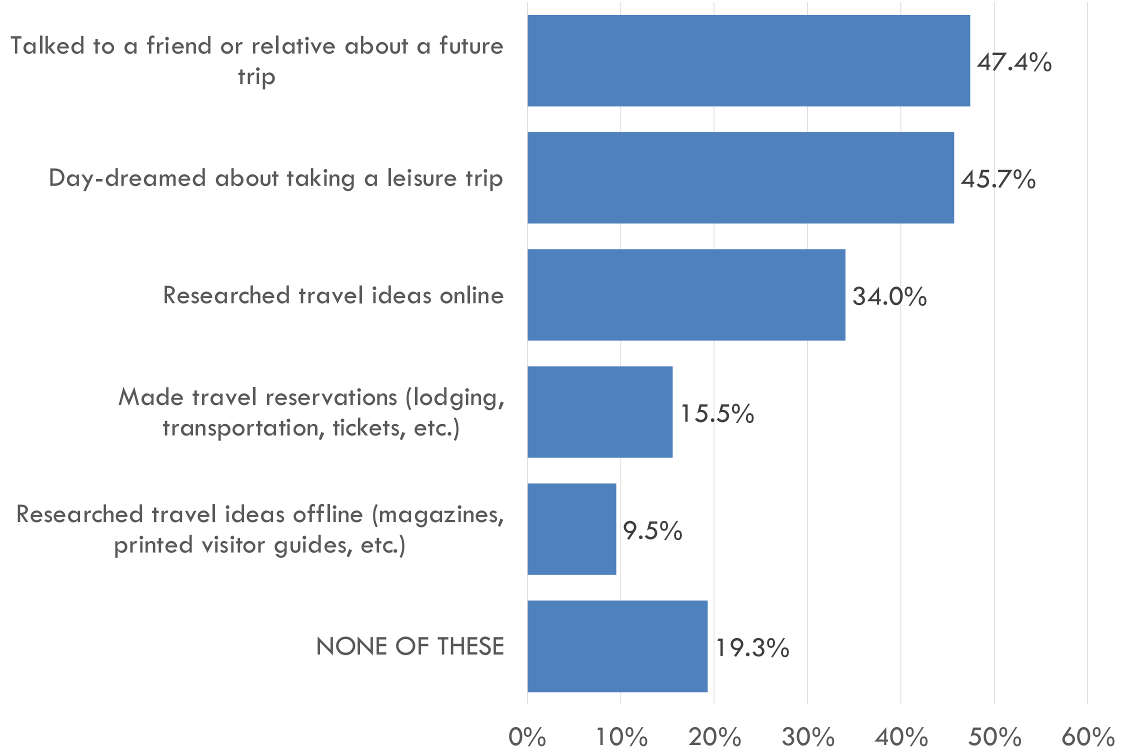
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?



Destination Analysts

TRAVEL PLANNING IN THE PAST WEEK

80.7% of American Travelers did some trip dreaming and planning in the last week alone



Question: In the PAST WEEK, which of the following have you done? (Select all that complete the sentence)

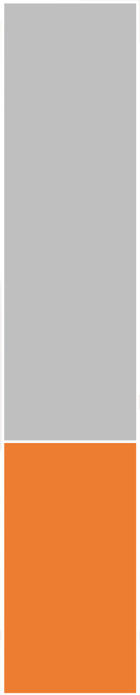
In the PAST WEEK I have _____________

(Base: All respondents, 4,060 completed surveys. Data collected April 18-24, 2022)

BUSINESS TRAVEL

65.1%

of American travelers feel it's likely companies will require more employees to return to the office in the remainder of the year.



Only **36.5%**

of American travelers currently feel that business travel will return to pre-pandemic levels this year—as 64.7% believe that virtual meetings will continue to replace many in-person meetings.

TOURISM & HOSPITALITY WORKFORCE

65.3%

of American travelers feel it's likely tourism businesses will continue to have problems finding employees this year.

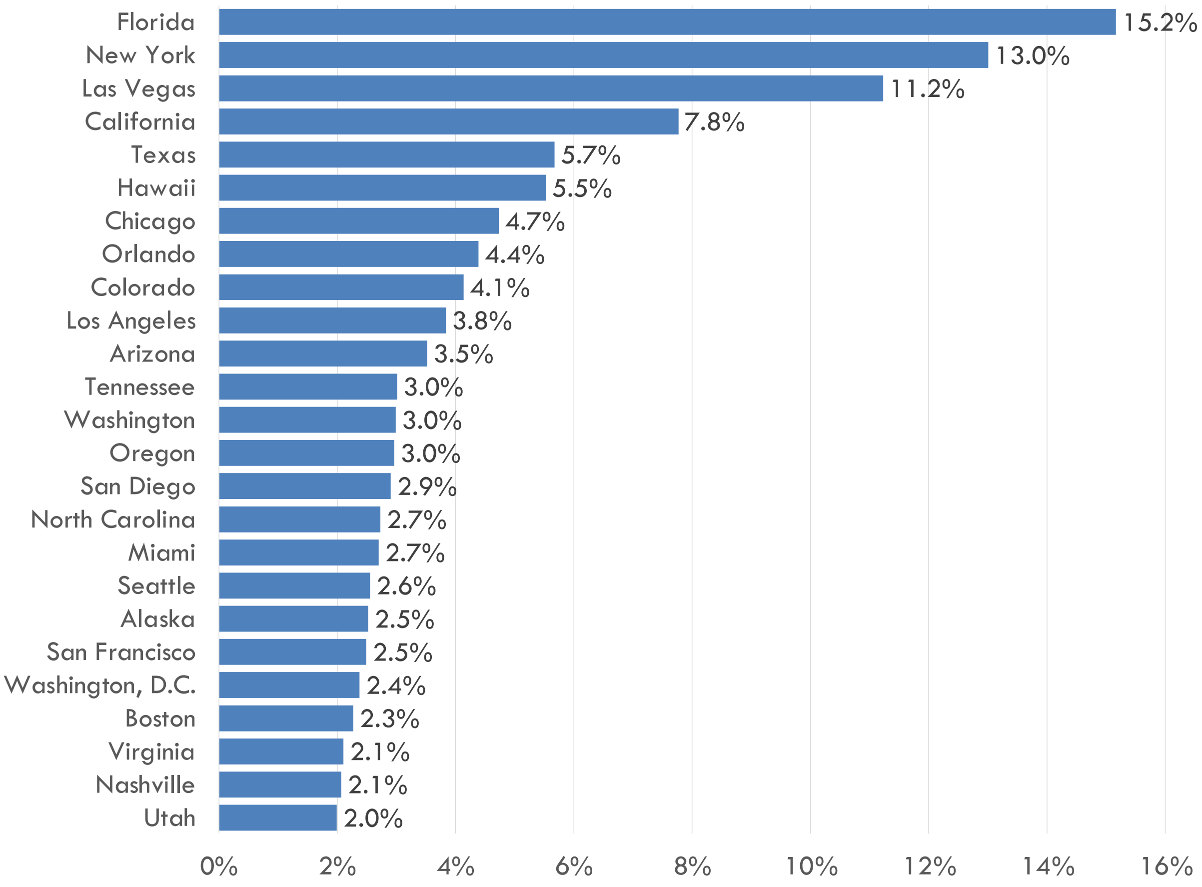
TRAVEL ATTITUDES & PREFERENCES

MOST DESIRED DOMESTIC DESTINATIONS IN THE NEXT 12 MONTHS (UNAIDED)

Question: Which domestic destinations do you most want to visit in the NEXT TWELVE (12) MONTHS? (Write in up to five)

(Please only include destinations in the United States)

(Base: All respondents, 3,645 completed surveys. Data collected April 18-24, 2022.)



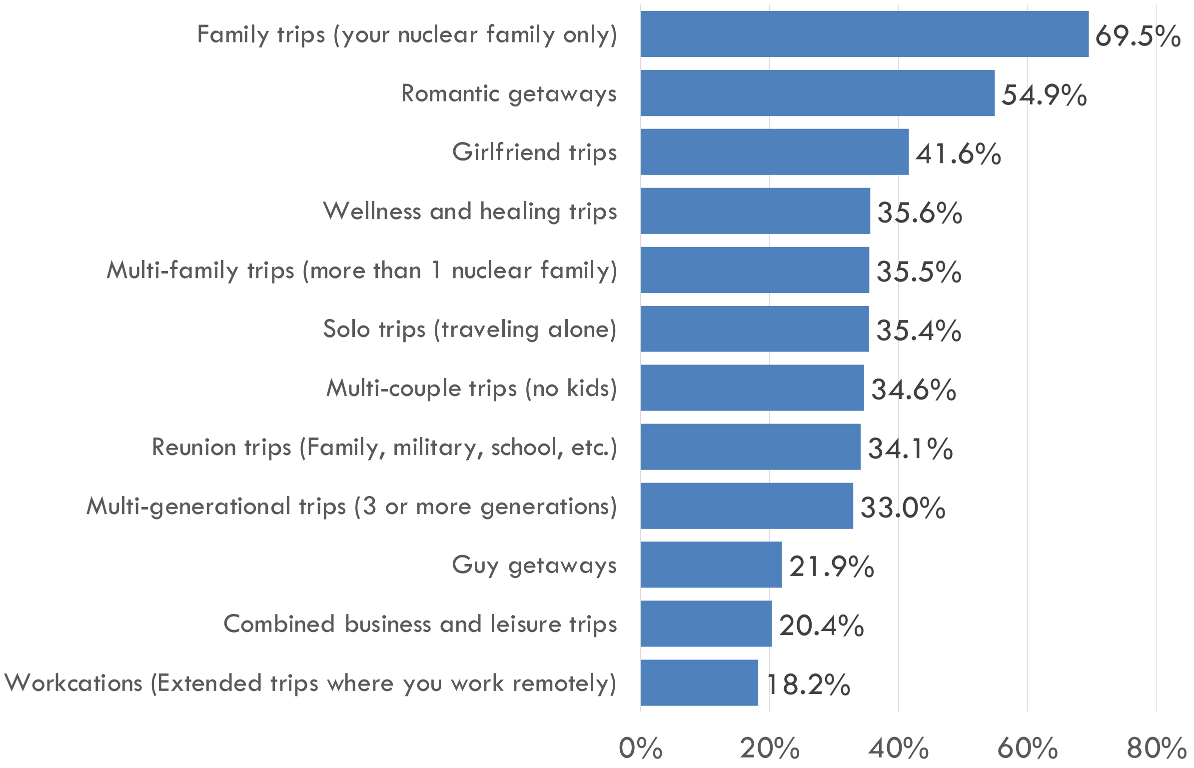
EXCITEMENT FOR LEISURE TRAVEL, BY TRIP TYPE

Question: Thinking carefully about THE NEXT TWELVE (12) MONTHS.

Use the 10-point scale where 10 = "Extremely excited" and 1 = "Not at all excited" to state how generally excited you are to take each of these types of trips?

(Base: All respondents, 4,060 completed surveys.

Data collected April 18-24, 2022.)



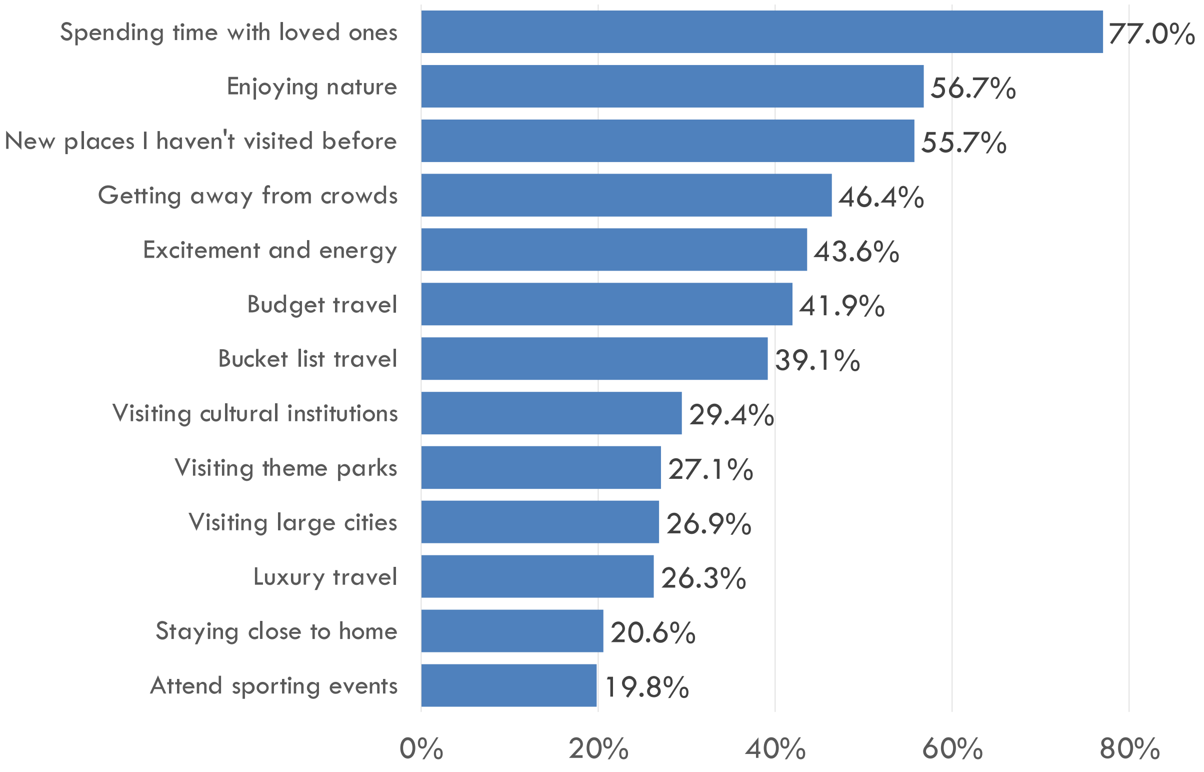
TRAVEL PRIORITIES

Question: **Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?**

However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: All respondents, 4,060 completed surveys.

Data collected April 18-24, 2022.)



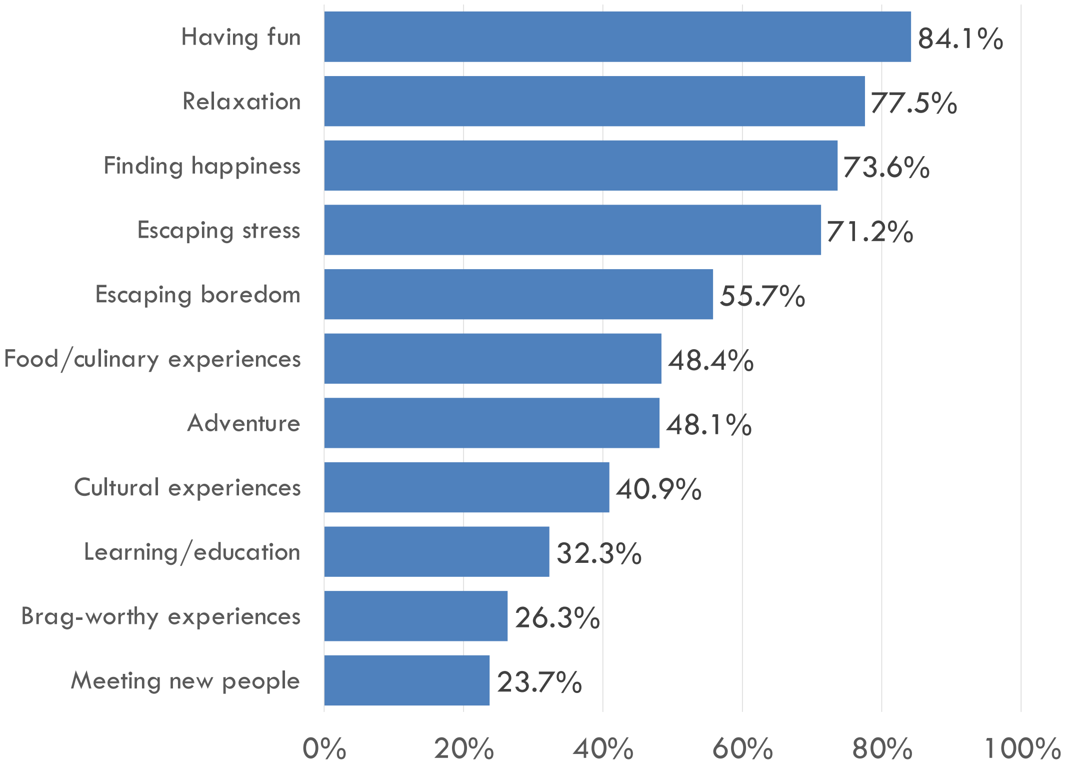
TRAVEL EXPERIENCES PRIORITIZATION

Question: Continuing this line of thought: Thinking about your travel in the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?

However you personally define each, use the scale provided to indicate how you will prioritize them.

(Base: All respondents, 4,060 completed surveys.

Data collected April 18-24, 2022.)



Destination Analysts

LUXURY TRAVEL EXPERIENCES

35.6%

of American travelers say having luxury travel experiences is usually an important part of their leisure trips.

GROUP TOUR EXPERIENCES

28.1%

of American travelers say they enjoy having group tour experiences as part of their leisure trips.

AVOIDING "TOURISTY" DESTINATIONS

43.2%

of American travelers agree they usually avoid visiting touristy or overdeveloped places.

PREFERENCE FOR NEW DESTINATIONS

53.5%

of American travelers prefer visiting places they have never been to over places they have visited before.

PREFERENCE FOR INTERNATIONAL TRAVEL

25.3%

of American travelers are currently more interested in traveling outside the United States than inside the United States.

PREFERENCE FOR ACTIVE VACATIONS

47.2%

of American travelers tend to prefer

"active time" to "down time" on vacations.

MAKING FRIENDS WHILE TRAVELING

37.3%

of American travelers say they are the kind of person that often makes new friends while traveling.

ENJOYS THE ENERGY OF CROWDS

28.0%

of American travelers enjoy the energy

of being in a crowd of people

PATRONIZING MINORITY-OWNED BUSINESSES

33.1%

of American travelers usually make an effort to support minority-owned businesses when they travel.

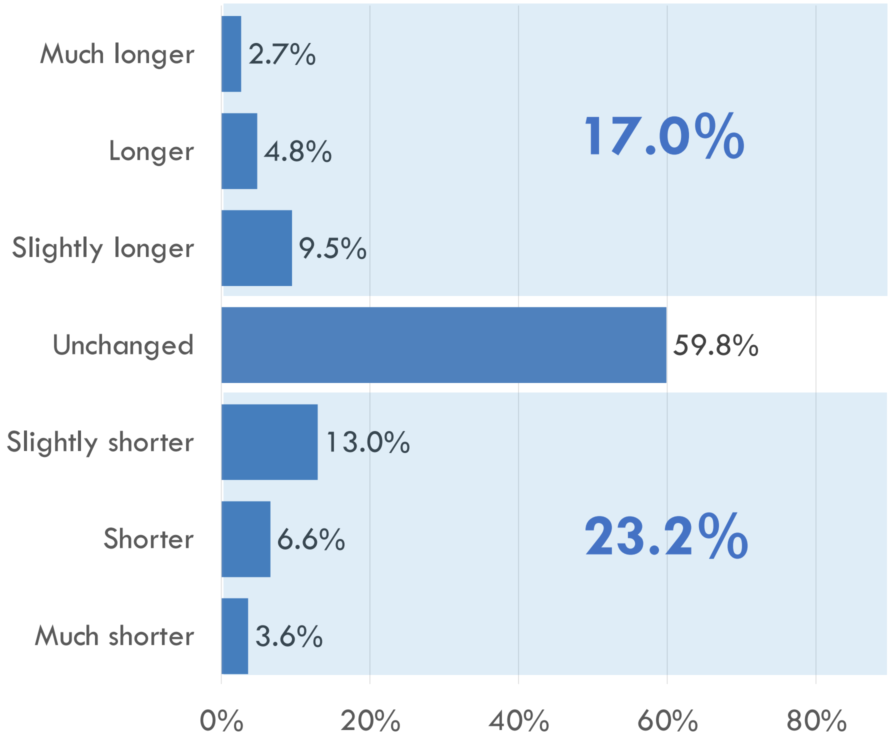
LIMITING PERSONAL ENVIRONMENTAL IMPACT

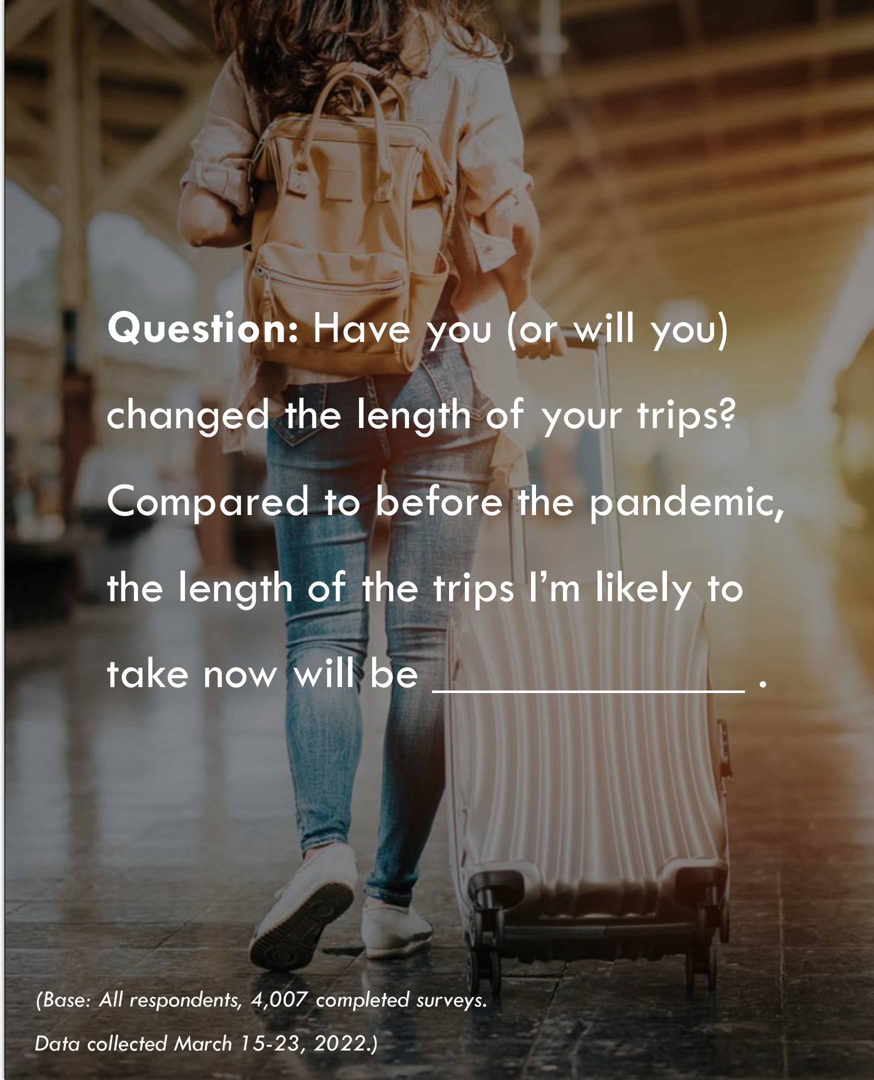
54.0%

of American travelers usually make an effort to limit their personal impact on the environment when traveling.


HOW WE HAVE CHANGED

CHANGE IN LENGTH OF TRIP



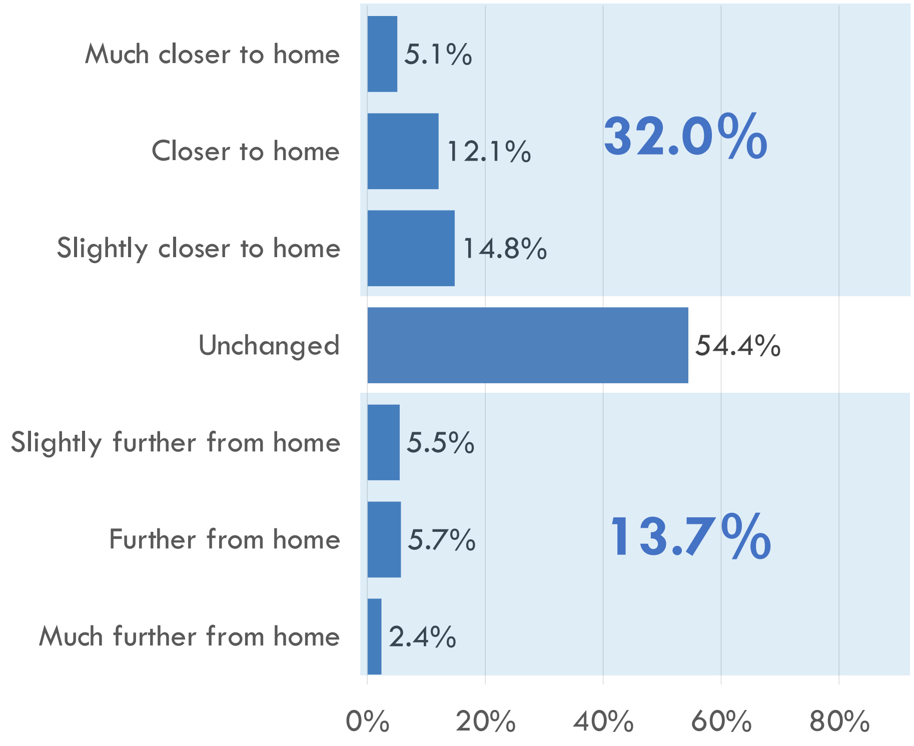


Question: Have you (or will you) changed the length of your trips? Compared to before the pandemic, the length of the trips I'm likely to take now will be ______________ .

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

Destination Analysts

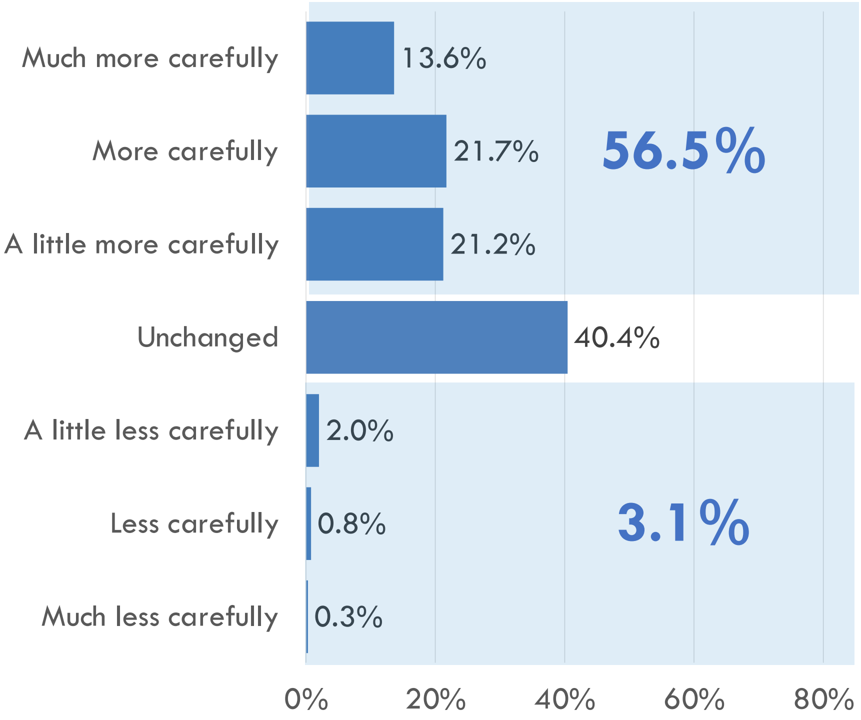
CHANGE IN DISTANCE OF TRIP

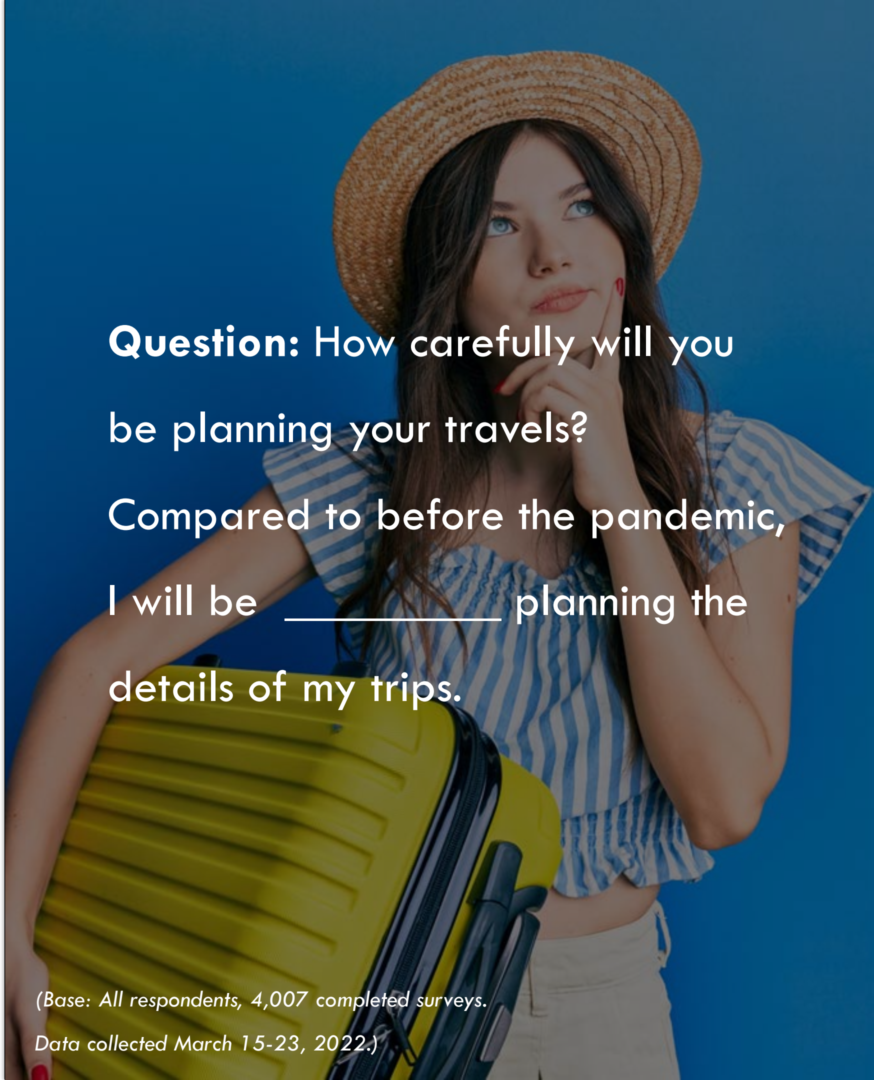


Question: How far from home are you likely to be traveling? Compared to before the pandemic, the trips I'm likely to take now will be____________ .

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

CHANGE IN CAUTIOUS PLANNING OF TRIP

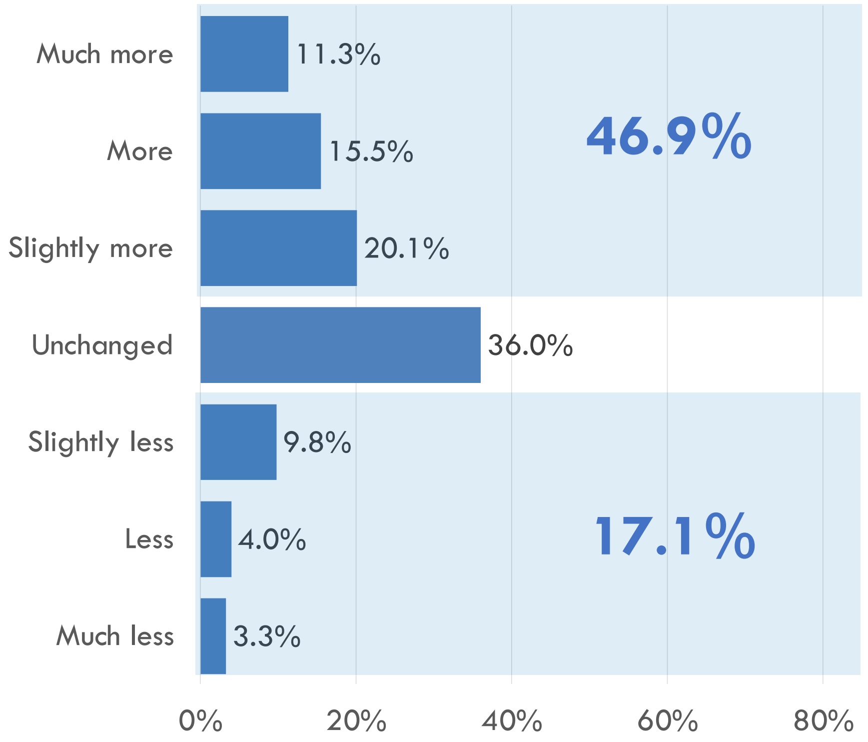


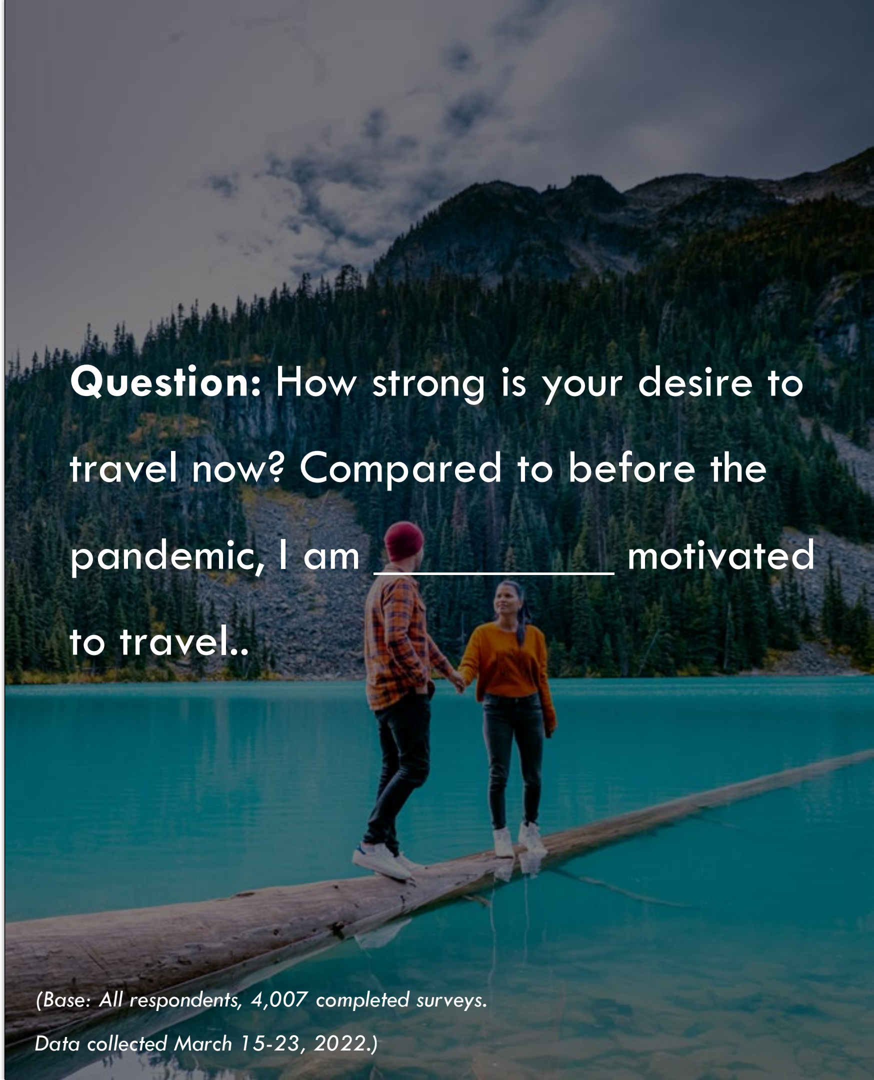


Question: How carefully will you be planning your travels? Compared to before the pandemic, I will be ________ planning the details of my trips.

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

CHANGE IN DESIRE TO TRAVEL



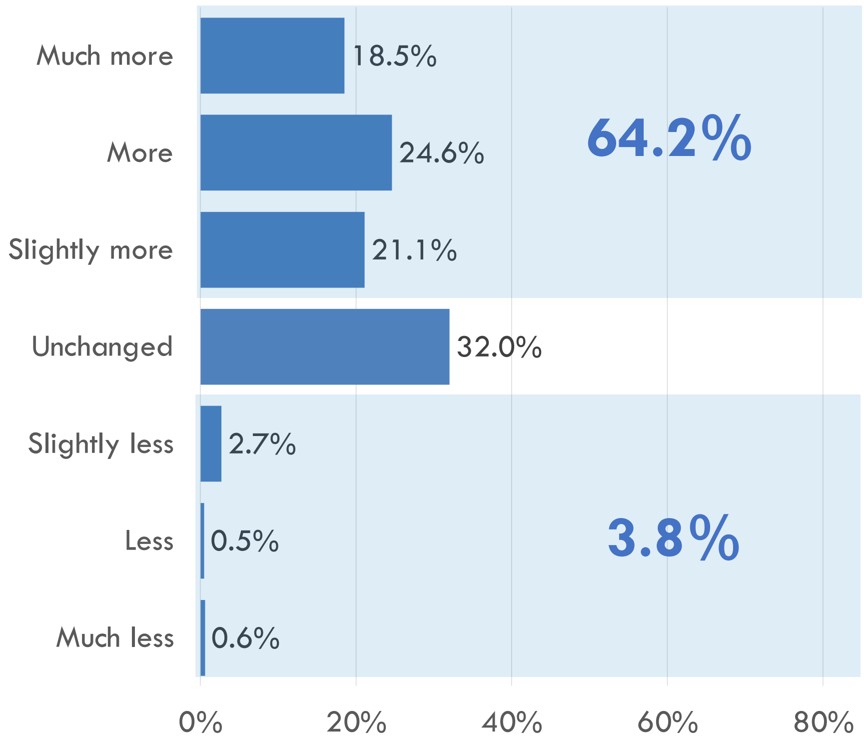


Question: How strong is your desire to travel now? Compared to before the pandemic, I am ___________ motivated to travel..

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

Destination Analysts

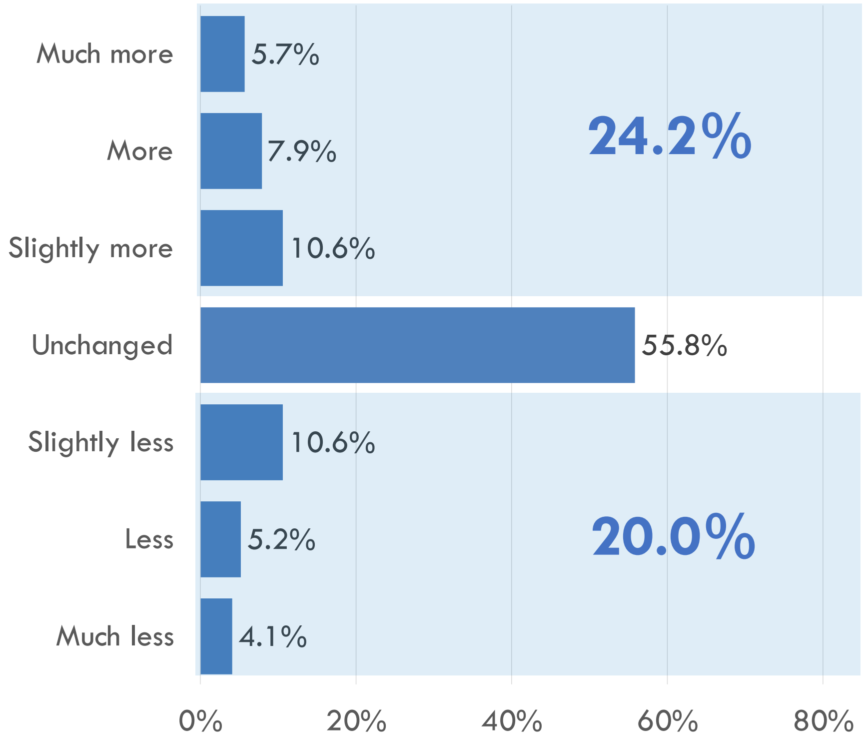
CHANGE IN SENTIMENT TOWARDS FRONT LINE STAFF OF TRAVEL COMPANIES



Question: How do you feel about the tourism industry employees serving you while you travel? Compared to before the pandemic, I am __________ sympathetic to the front-line staff of travel companies (hotels, airlines, restaurants, etc.).

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

CHANGE IN INTEREST IN VISITING CITIES OR URBAN AREAS

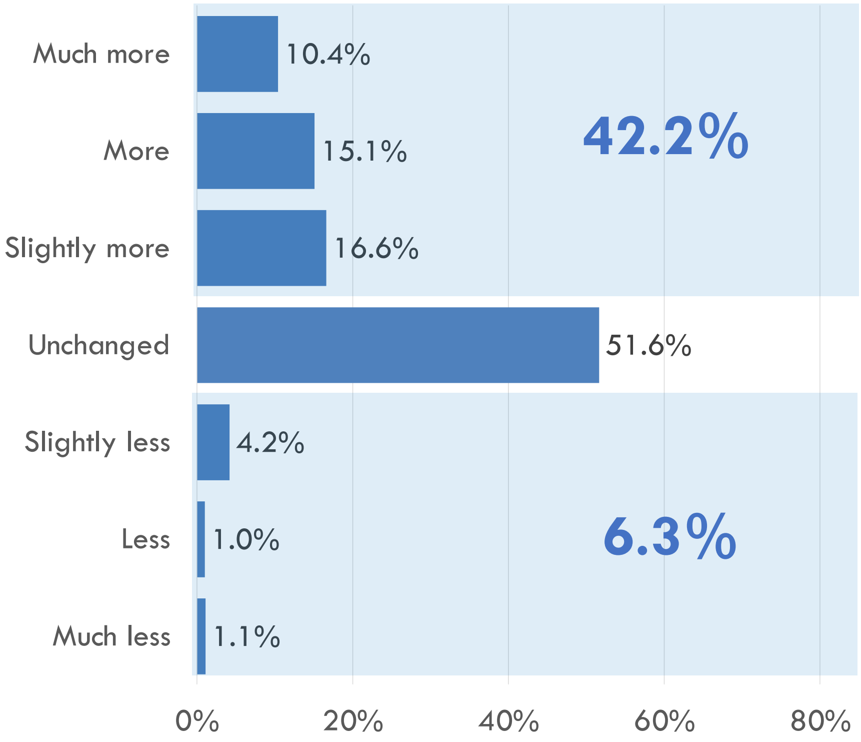


Question: Has your interest in visiting cities or urban areas changed? Compared to before the pandemic, I am ________ interested in visiting cities or urban areas.

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

Destination Analysts

CHANGE IN INTEREST IN OUTDOOR-ORIENTED DESTINATIONS



Question: Has your interest in visiting outdoor-oriented destinations (e.g., rural areas, mountain towns, beach destinations, State or National Parks, etc.) changed? Compared to before the pandemic, I am ________ interested in visiting outdoor-oriented destinations.

(Base: All respondents, 4,007 completed surveys. Data collected March 15-23, 2022.)

Destination Analysts

THE STATE OF THE INTERNATIONAL TRAVELER IN 2022

+ A Profile of Global Travelers Hot for the South

Destination Analysts

THE STATE OF THE INTERNATIONAL TRAVELER STUDY

- Online survey of international travelers in 15 top feeder markets to the United States
- 800+ surveys per market; 12,000 total surveys collected
- Examines sentiment, media consumption, perceptions, travel desires and behaviors, as well as the brand performance of over 65 destinations
- Fielded February 4th-16th, 2022

Destination Analysts

THE STATE OF THE INTERNATIONAL TRAVELER STUDY MARKETS

- CANADA
- MEXICO
- BRAZIL
- CHINA
- JAPAN
- INDIA
- AUSTRALIA
- COLUMBIA
- GERMANY
- FRANCE
- UNITED KINGDOM
- ARGENTINA
- SOUTH KOREA
- NETHERLANDS
- ITALY

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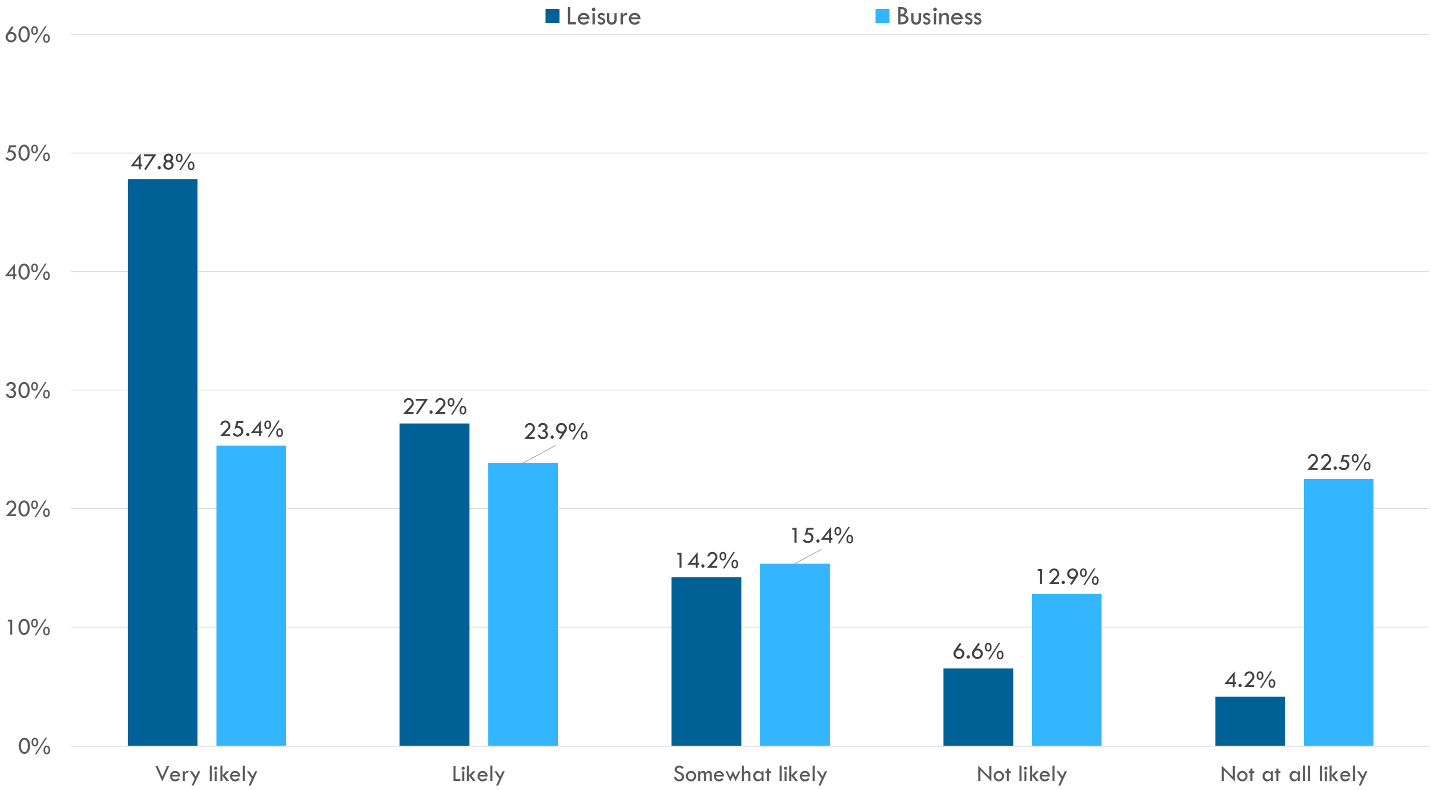
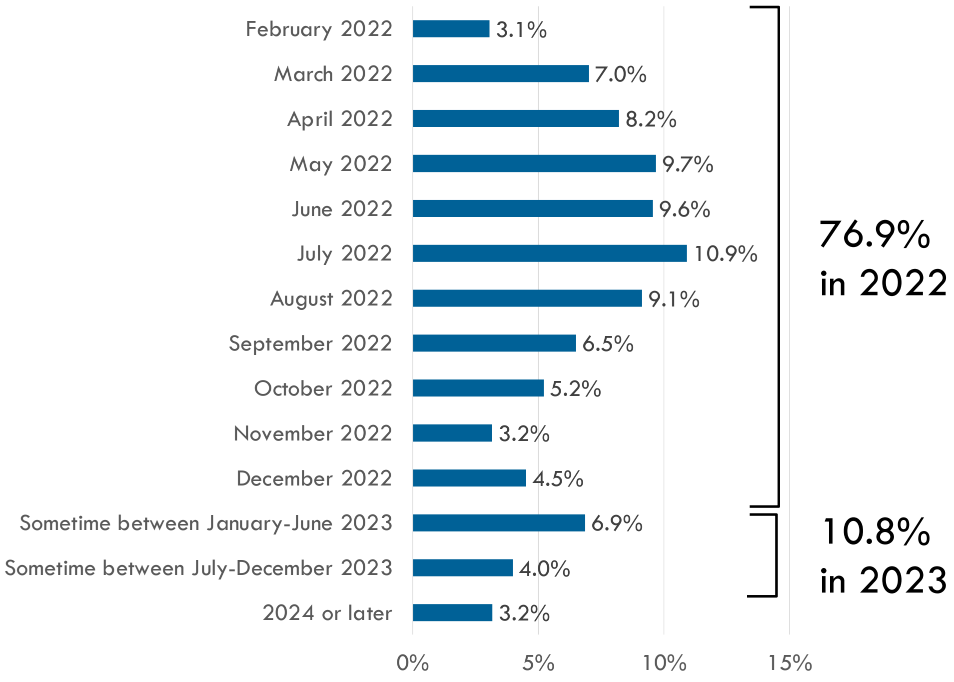
GLOBAL TRAVEL SENTIMENT

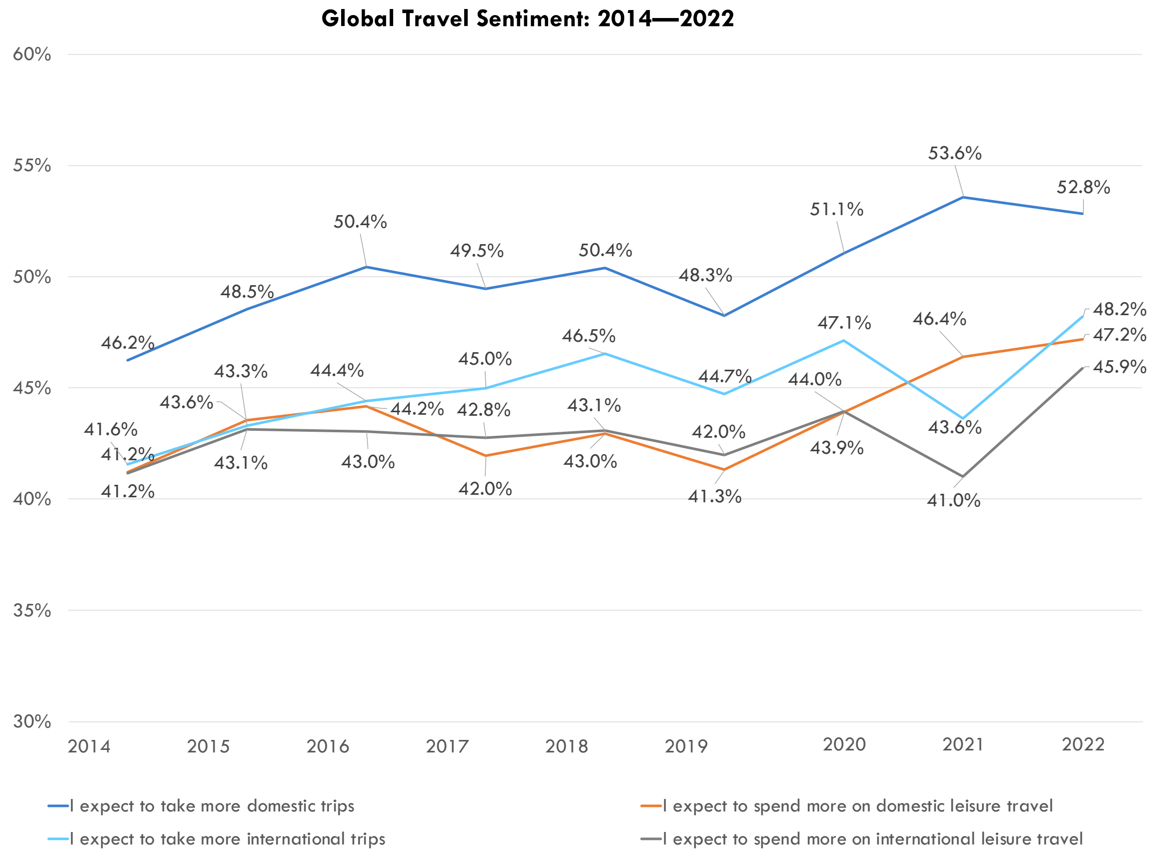
LIKELIHOOD TO TRAVEL INTERNATIONALLY THIS YEAR



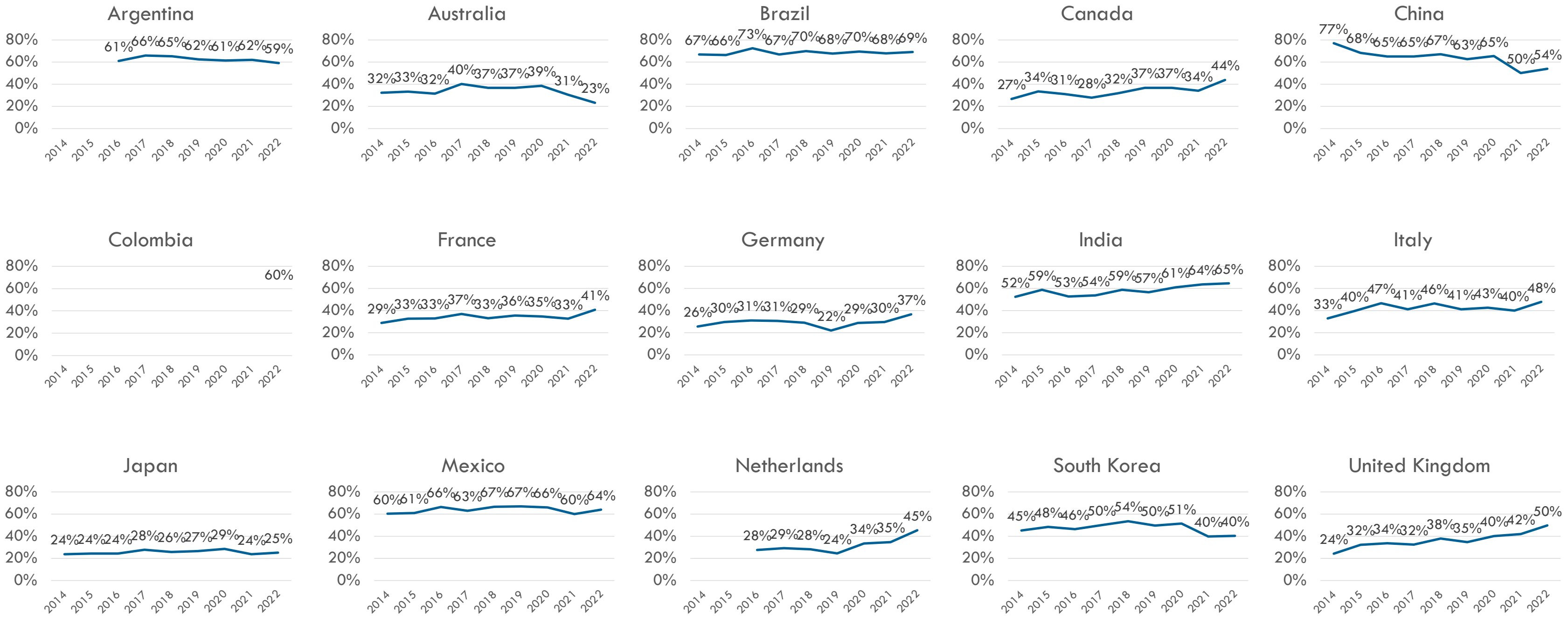
MONTH OF NEXT INTERNATIONAL TRIP



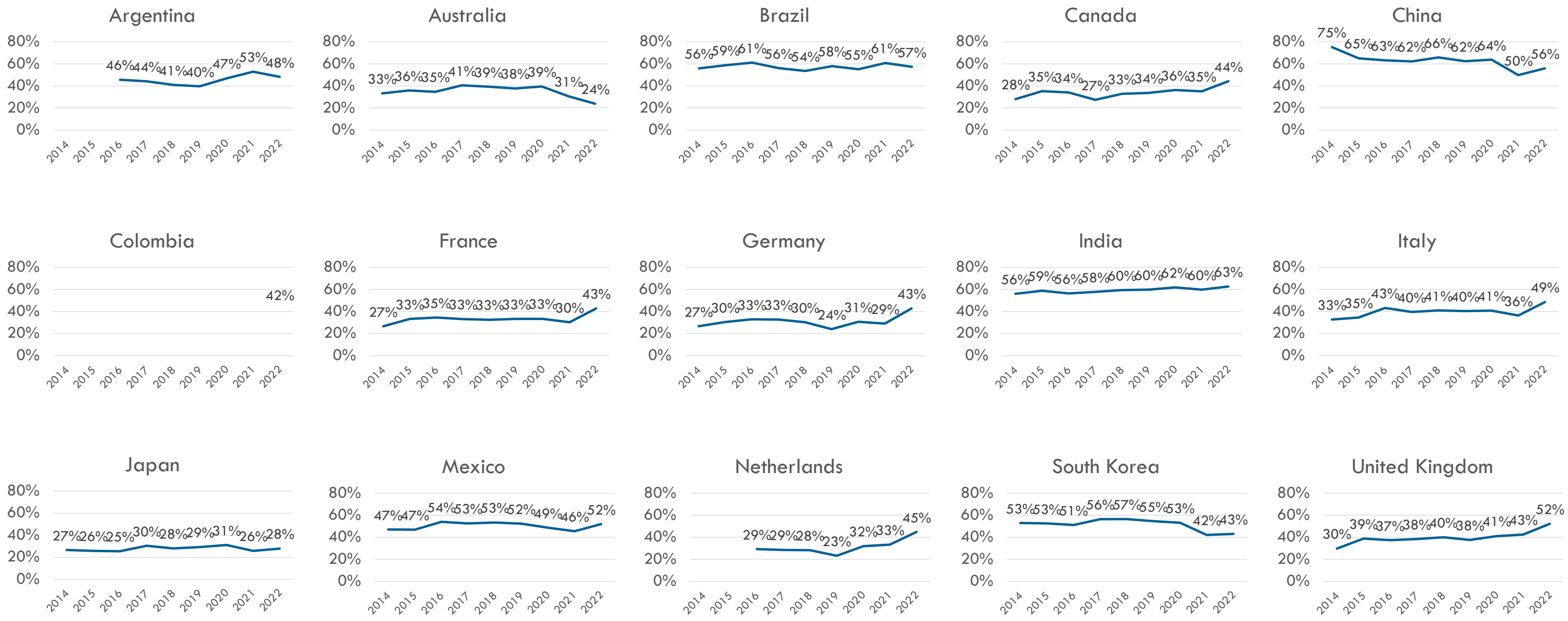
TRAVEL VOLUME & SPENDING EXPECTATIONS



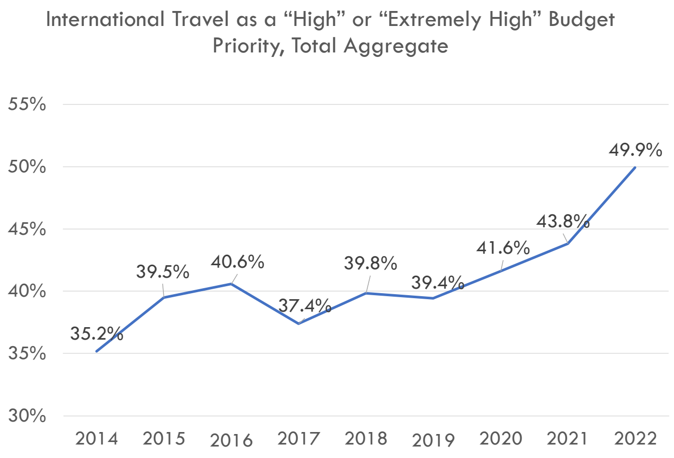
INTERNATIONAL TRIP VOLUME BY MARKET 2014-2022



INTERNATIONAL TRIP SPENDING BY MARKET 2014-2022



HIGH PRIORITIZATION OF INTERNATIONAL TRAVEL IN BUDGET



International Travel is a "High" or "Extremely High" Budget Priority

	2018	2019	2020	2021	2022	% CHNG 2021-2022
India	61.3%	64.8%	62.8%	73.6%	79.3%	7.6%
Brazil	45.1%	48.5%	52.1%	60.5%	65.1%	7.6%
China	49.8%	43.9%	48.7%	51.0%	59.8%	17.2%
Germany	48.8%	44.5%	45.3%	45.3%	59.6%	31.8%
Mexico	52.1%	48.5%	48.8%	51.1%	59.1%	15.6%
United Kingdom	36.8%	37.5%	42.2%	36.0%	56.4%	56.6%
France	33.6%	37.1%	35.0%	38.6%	53.6%	38.8%
Argentina	32.3%	28.6%	37.4%	51.3%	51.4%	0.2%
South Korea	42.9%	42.5%	44.2%	46.0%	48.6%	5.7%
Canada	27.0%	30.5%	33.4%	31.0%	47.0%	51.6%
Italy	32.0%	30.7%	30.4%	35.8%	46.4%	29.7%
Colombia	-	-	-	-	37.9%	-
Netherlands	26.1%	20.5%	29.4%	25.9%	34.4%	32.9%
Japan	30.8%	36.8%	32.5%	33.4%	29.0%	-13.1%
Australia	37.6%	36.9%	39.8%	34.0%	21.5%	-36.8%

BUDGET FOR INTERNATIONAL TRAVEL

Maximum Budgeted for International Travel
(reported in respondents' domestic currencies and converted to USD)

	2018	2019	2020	2021	2022	% CHNG 2021-2022
China	$6,979	$6,554	$6,973	$6,557	$7,166	9.3%
Canada	$3,261	$3,896	$3,681	$4,148	$4,796	15.6%
United Kingdom	$3,820	$3,861	$3,884	$4,289	$4,361	1.7%
Argentina	$2,936	$3,612	$2,958	$2,831	$3,705	30.8%
Germany	$3,639	$3,320	$3,381	$3,541	$3,675	3.8%
Netherlands	$3,533	$3,163	$3,941	$3,576	$3,481	-2.7%
Brazil	$3,689	$3,783	$4,056	$3,022	$3,326	10.1%
Mexico	$3,157	$3,632	$3,149	$2,993	$3,229	7.9%
South Korea	$3,669	$4,358	$5,439	$3,996	$3,182	-20.4%
Australia	$6,171	$5,950	$6,171	$4,289	$3,158	-26.4%
India	$4,491	$4,733	$5,282	$3,720	$3,020	-18.8%
France	$3,234	$2,883	$3,248	$3,133	$2,719	-13.2%
Italy	$2,992	$3,124	$2,884	$2,544	$2,639	3.7%
Japan	$3,463	$3,669	$4,635	$3,341	$2,550	-23.7%
Colombia	-	-	-	-	$2,095	-

DAYS AVAILABLE FOR INTERNATIONAL TRAVEL THIS YEAR

	2018	2019	2020	2021	2022	% CHNG 2021-2022
Netherlands	22.2	20.6	20.6	21.2	21.8	3.1%
Argentina	20.9	19.2	19.5	19.8	19.0	-3.9%
United Kingdom	17.3	16.8	16.5	21.0	18.7	-11.3%
Canada	16.1	15.6	16.1	18.8	18.3	-2.6%
Brazil	18	17.1	17.5	18.7	17.6	-5.8%
Germany	17.1	16.5	17.9	17.5	17.2	-1.5%
Australia	19.3	18.9	20.3	16.1	14.1	-12.4%
France	13.3	12.1	13.7	11.9	13.6	14.3%
China	15	14.7	15.1	14.7	13.5	-8.4%
Colombia	-	-	-	-	13.4	-
Italy	14.7	15	14.2	14.0	12.9	-8.0%
Mexico	15.8	15.6	14.3	13.9	12.8	-8.2%
India	13.7	14.5	13.8	11.9	11.4	-4.5%
South Korea	10	10.1	10.3	10.9	9.2	-15.9%
Japan	7.1	6.9	7.7	6.1	5.8	-5.4%


WHAT DEFINES THEM AS
INTERNATIONAL TRAVELERS

sts


INSPIRATION &
TRAVEL PLANNING

IMPORTANT FACTORS IN BOOKING INTERNATIONAL TRAVEL

Destination Analysts
DO YOUR RESEARCH

Trip Cost	76.9%
Convenience of planning	74.9%
Strict COVID-19 entry requirements	69.5%
Welcoming environment to people of diverse identities	69.2%
Cultural diversity in the local population of the country	61.8%
Cultural diversity in the tourists that visit the country	59.3%
Sustainability and carbon footprint	52.2%
Trendy—being a "hot" place to go at the moment	42.5%

(Table shows % rating each as "Important" or "Very important")

Question: *How important is each of the following factors when booking international travel?*

SOURCES OF DESTINATION INFORMATION

Destination Analysts
DO YOUR RESEARCH

Sources of Destination Inspiration
(Overall – all countries)

	2019	2020	2021	2022	% CHG 2021-2022
Opinions of friends and relatives — in person/ through direct contact (email, text, etc.)	54.0%	52.9%	46.1%	43.5%	-5.7%
Online Media— Travel content found on Internet	42.5%	44.2%	42.8%	43.1%	0.7%
Opinions & experiences of digital influencers	25.6%	27.5%	28.4%	33.6%	18.2%
Opinions of friends and relatives — via social media	30.4%	31.4%	29.5%	29.0%	-1.6%
Online VIDEO travel content (Video only)	24.8%	26.3%	28.3%	25.2%	-11.0%
Travel agencies or tour operators	27.2%	23.4%	23.1%	20.9%	-9.8%
Offline Media—TV, printed newspapers, magazines	19.6%	19.1%	19.0%	15.8%	-16.9%
Television	19.1%	18.2%	15.2%	12.0%	-20.9%
Movies	11.2%	12.1%	10.0%	8.5%	-15.1%

TRIP PLANNING RESOURCES

Use of Digital Travel Planning Resources (Overall—all countries)

(% likely to use for international travel planning)

Online search engines (Google, Bing, Yahoo, etc.)	54.9%
Online travel agencies (Expedia, Travelocity, etc.)	43.3%
Official visitor's bureau website	34.9%
Tour agent or tour operator websites	26.3%
Online travel reviews, blogs, itineraries	24.8%
Online mapping website (Google Maps, Mapquest.com, etc.)	24.2%
Social media (Facebook, Twitter, Pinterest, etc.)	22.9%
Official visitor's bureau social media content	18.1%
Online video travel content	17.5%
Travel or lifestyle magazine websites (online content)	15.2%
Travel-related apps	14.0%
Home-sharing or Vacation Rental Websites (Airbnb, etc.)	13.0%
Travel-related e-mail newsletters	9.6%
Newspaper travel section (online content)	9.5%
Digital influencers	8.2%

*Examples given were specific to each country

Use of Traditional (Offline) Travel Planning Resources (Overall—all countries)

(% likely to use for international travel planning)

Opinions of friends, colleagues, or relatives	43.7%
Travel agent - offline (traditional or store front)	34.6%
Travel related TV programming	28.8%
Commercial guidebook	27.2%
Travel or lifestyle magazine	25.9%
Official visitor information center	19.8%
Newspaper travel section	17.3%
Travel related radio programming	11.0%

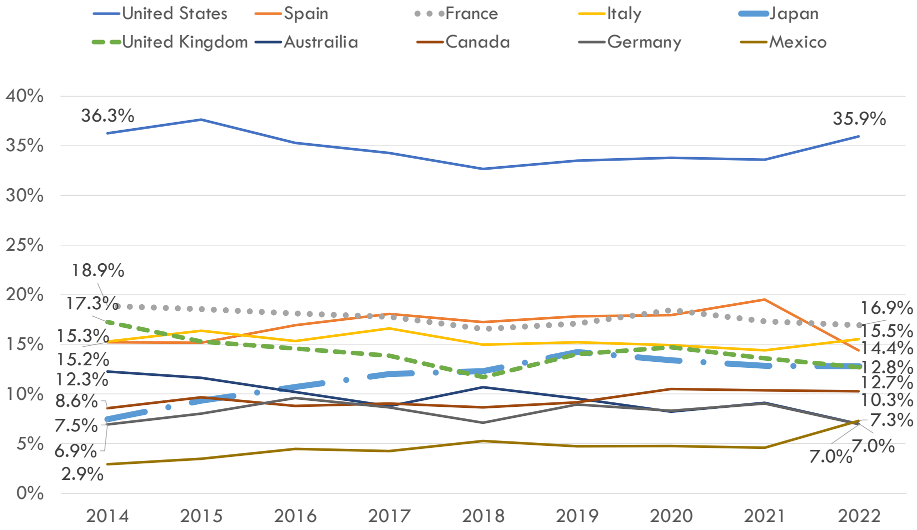
THE UNITED STATES BRAND

MOST DESIRED INTERNATIONAL DESTINATIONS

Destination Analysts DO YOUR RESEARCH

Most Desired International Destinations (Unaided)
(Overall - All Countries)

	2018	2019	2020	2021	2022	% CHNG 2021-2022
United States	32.7%	33.5%	33.8%	33.6%	35.9%	7.0%
France	16.6%	17.1%	18.5%	17.3%	16.9%	-2.3%
Italy	15.0%	15.2%	14.9%	14.4%	15.5%	7.8%
Spain	17.3%	17.8%	18.0%	19.5%	14.4%	-26.2%
Japan	12.3%	14.2%	13.4%	12.9%	12.8%	-0.4%
United Kingdom	11.7%	14.0%	14.7%	13.6%	12.7%	-6.6%
Canada	8.7%	9.2%	10.5%	10.4%	10.3%	-1.1%
Mexico	5.3%	4.8%	4.8%	4.6%	7.3%	58.6%
Australia	10.7%	9.6%	8.2%	9.1%	7.0%	-23.2%
Germany	7.1%	9.0%	8.3%	9.1%	7.0%	-23.0%



THE UNITED STATES AS A TOP DESIRED DESTINATION

Destination Analysts
DO YOUR RESEARCH

	2018	2019	2020	2021	2022	% CHNG 2021-2022	USA's Rank in 2022
Brazil	51.1%	54.4%	58.0%	59.8%	56.9%	-4.9%	1
Mexico	53.7%	55.7%	44.9%	51.4%	52.3%	1.7%	1
Japan	42.1%	46.4%	45.9%	41.6%	51.8%	24.5%	1
India	38.1%	39.9%	36.7%	52.2%	50.4%	-3.4%	1
South Korea	31.0%	30.7%	40.0%	40.9%	45.1%	10.3%	1
Colombia	-	-	-	-	43.1%	-	1
Argentina	31.3%	35.6%	28.5%	38.2%	39.4%	3.2%	1
Canada	39.4%	42.7%	41.0%	41.6%	39.2%	-5.6%	1
China	38.6%	39.2%	41.9%	26.9%	38.6%	43.2%	2
United Kingdom	27.4%	26.8%	29.9%	26.3%	28.0%	6.2%	2
Australia	33.9%	30.6%	35.2%	23.7%	25.7%	8.4%	3
Italy	25.5%	27.5%	25.2%	23.5%	23.7%	0.7%	3
France	21.0%	18.9%	19.3%	18.2%	20.1%	10.5%	3
Germany	12.1%	11.5%	9.9%	10.6%	13.6%	27.6%	6
Netherlands	11.6%	8.9%	14.6%	12.2%	11.6%	-4.7%	6

WORLD PERCEPTIONS OF THE USA

Question: *Please describe why you most want to visit the United States of America.*

DRIVERS OF ASPIRATION TO VISIT THE USA

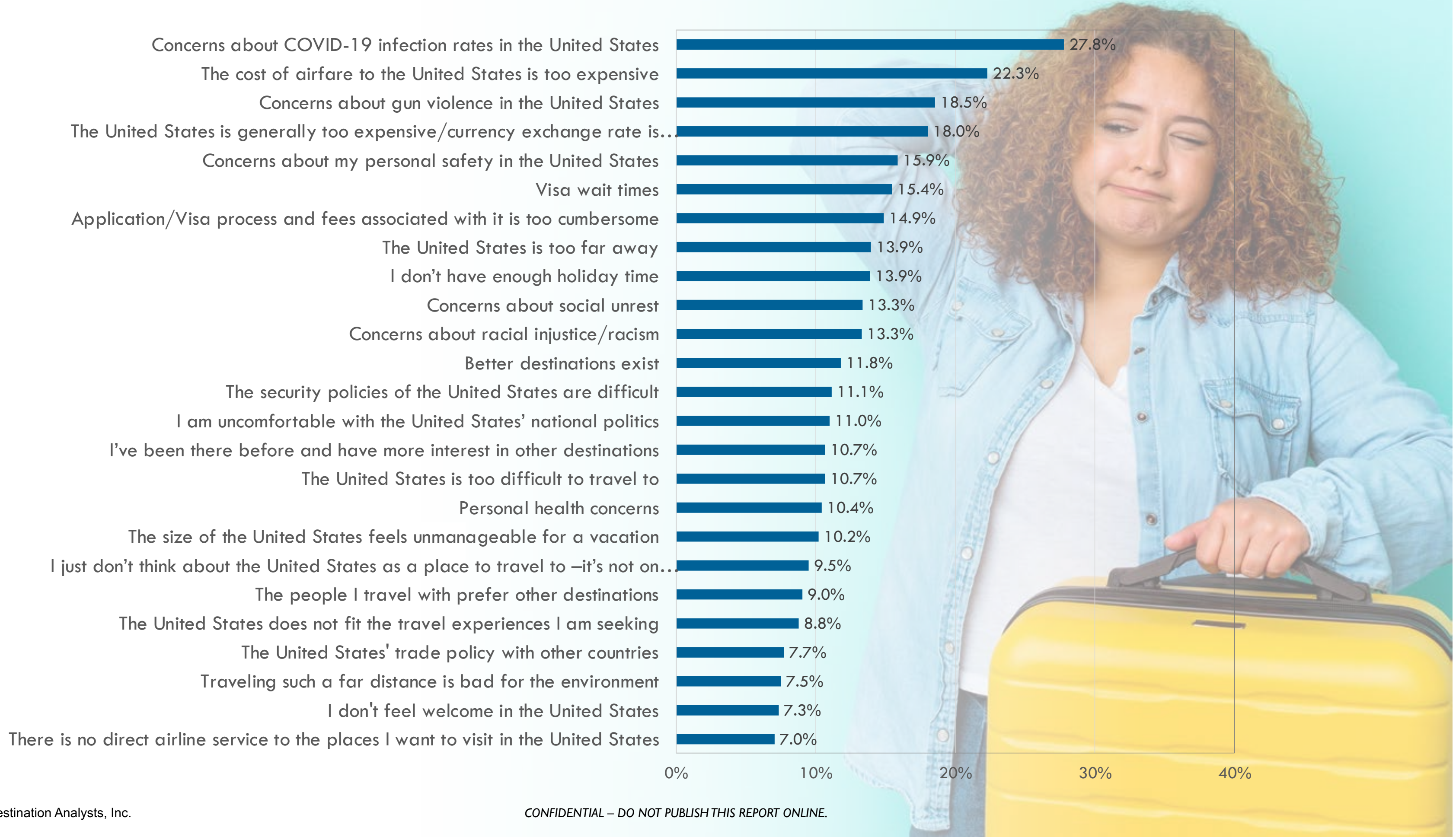




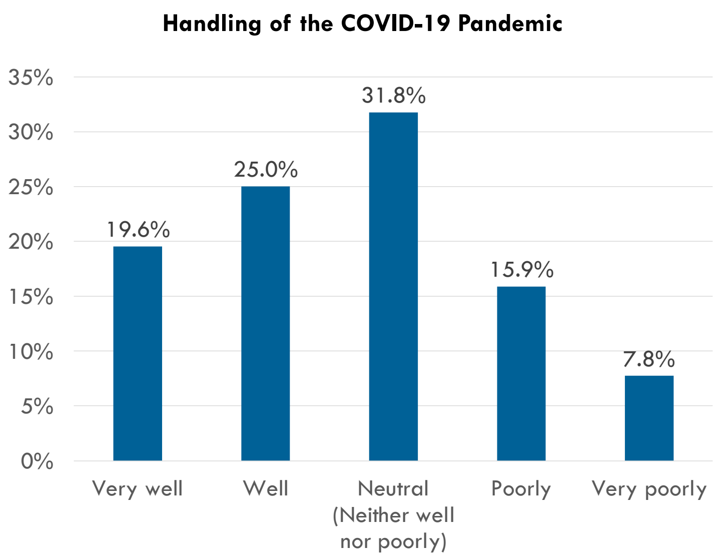

DETERRENTS TO VISITING THE USA

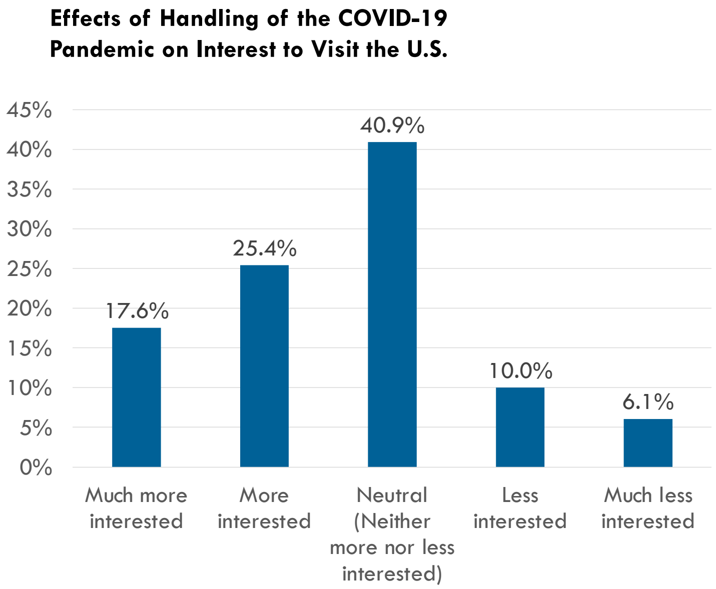
DETERRENTS TO VISITING THE USA

Destination Analysts
DO YOUR RESEARCH

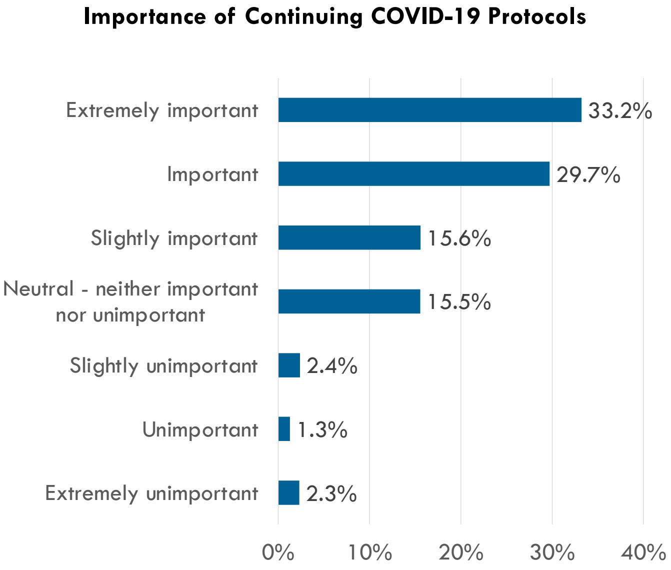


PERCEPTIONS OF THE US HANDLING OF THE PANDEMIC

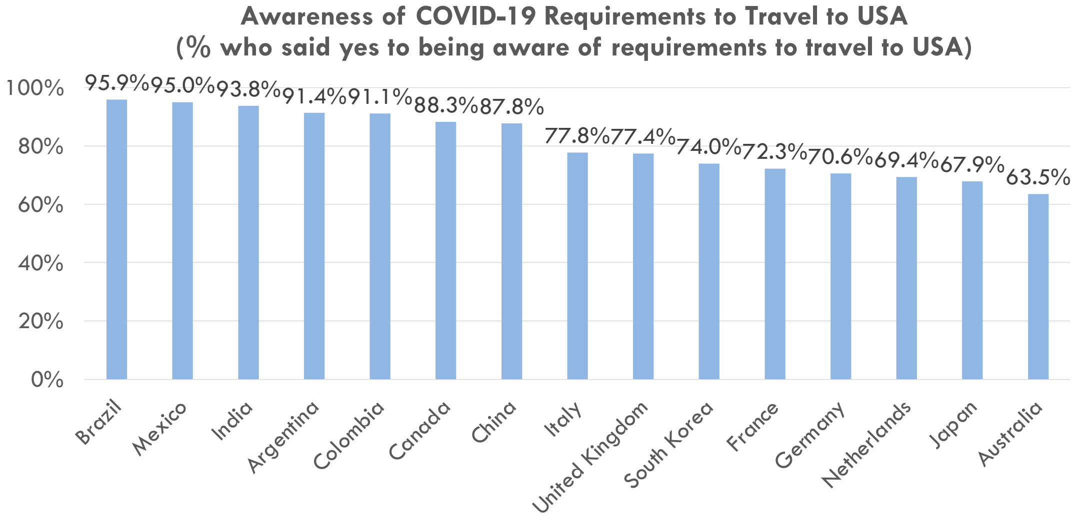


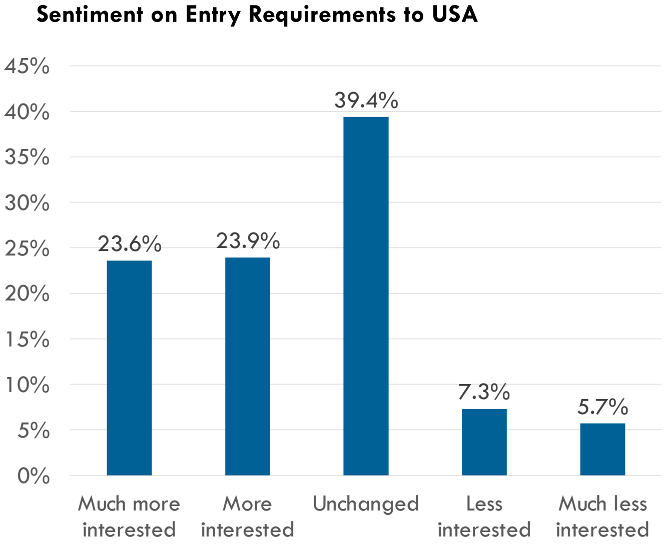


IMPORTANCE OF CONTINUING PANDEMIC PROTOCOLS

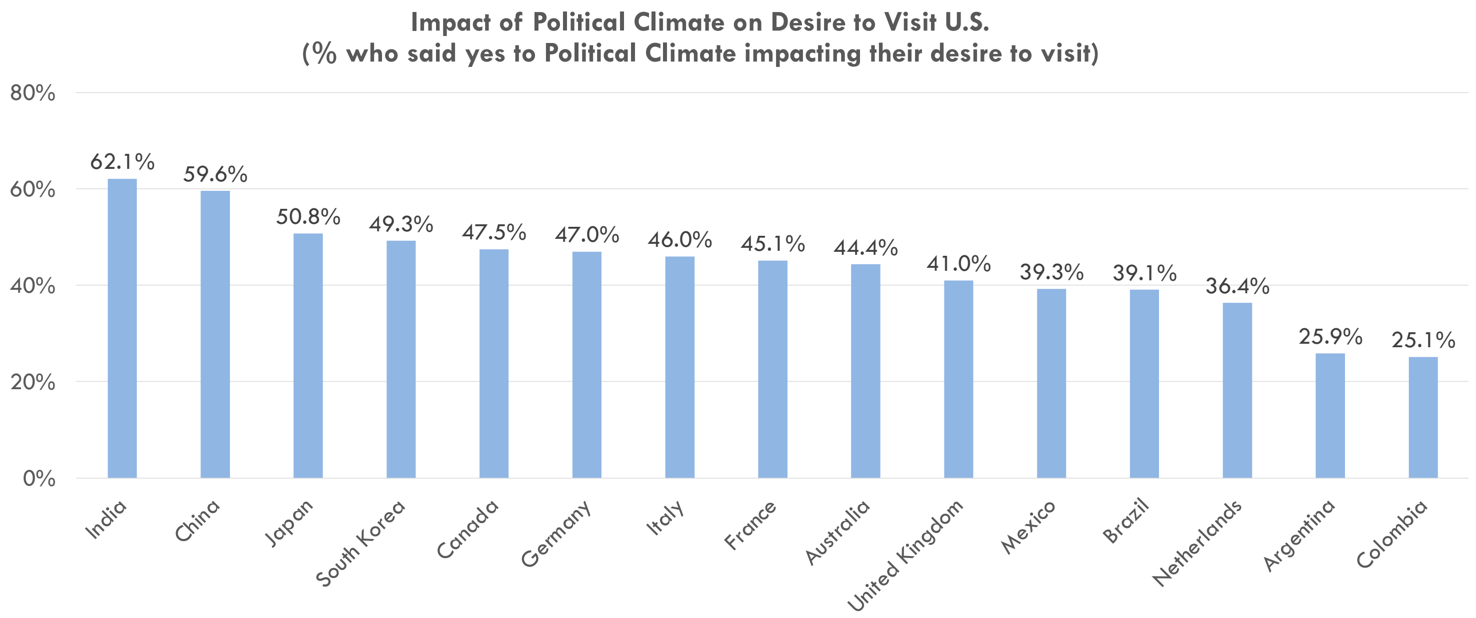


AWARENESS OF & SENTIMENT ON COVID ENTRY REQUIREMENTS TO USA





IMPACT OF THE CURRENT AMERICAN POLITICAL CLIMATE



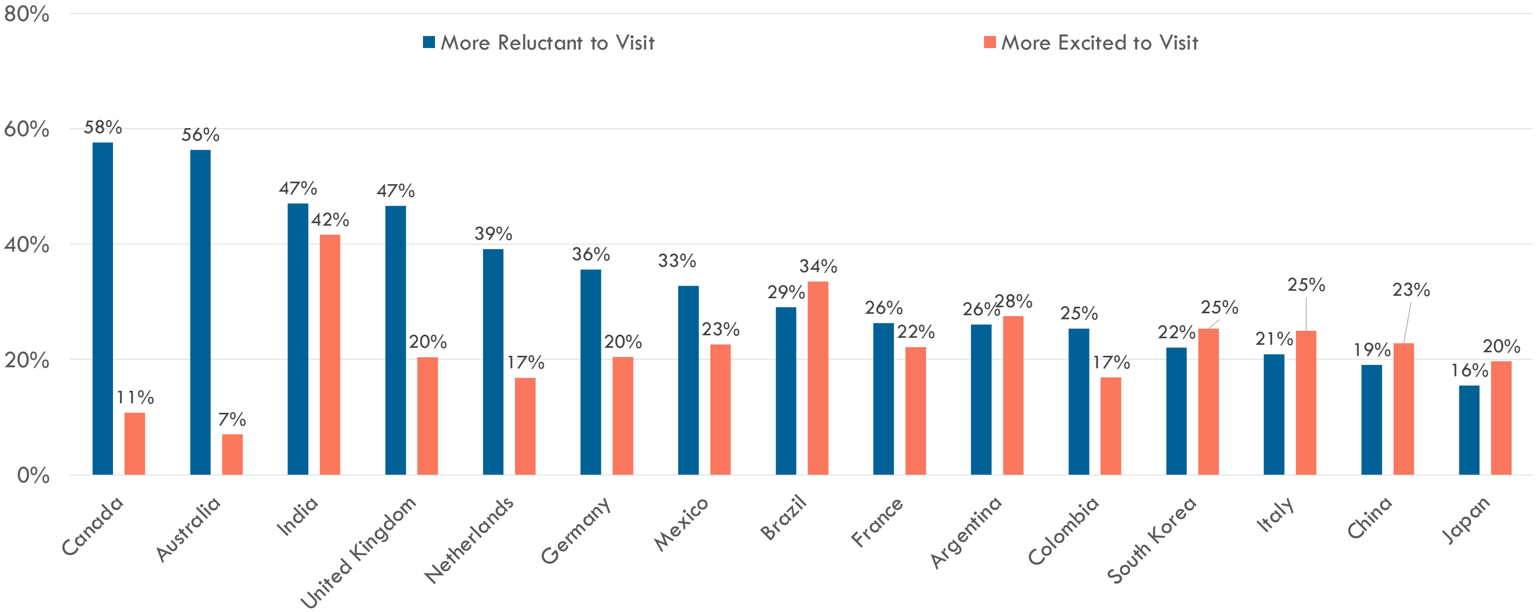
IMPACT OF THE AMERICAN POLITICAL CLIMATE ON DESIRE TO VISIT

I feel more reluctant to visit the United States	33.5%
I feel it's less safe to visit the United States	25.7%
I feel more excited to visit the United States	22.7%
I feel it's safer to visit the United States	20.6%
I will visit when I feel the political climate has improved	20.4%
I am avoiding travel to the United States as a form of political expression	8.2%
I want to travel to the United States to express my support	3.2%

Question: Which of the following statements describe the impact the current political climate in the United States has desire to visit—if any?

IMPACT OF THE AMERICAN POLITICAL CLIMATE ON DESIRE TO VISIT

Impact of American Political Climate: Reluctance vs Excitement to Visit



Question: *Which of the following statements describe the impact the current political climate in the United States has on your desire to visit—if any?*

LIKELIHOOD TO VISIT THE USA

Destination Analysts
DO YOUR RESEARCH

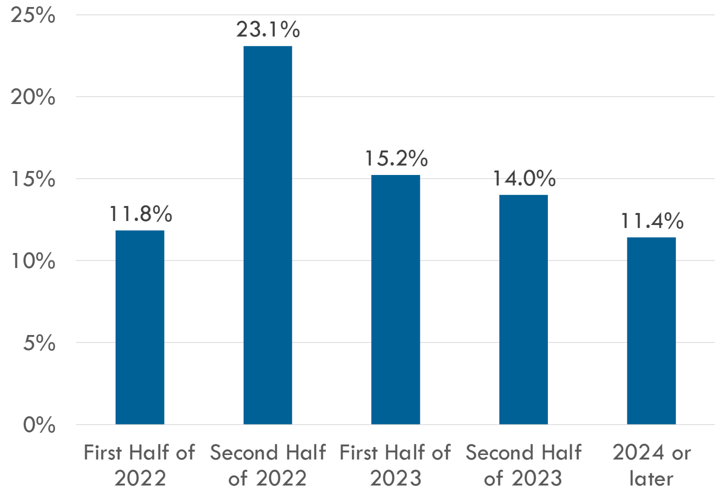
Overall Likelihood of Visiting the USA in Next Two Years
(All Countries)

	2018	2019	2020	2021	2022	% CHNG 2020-2021
Top 2 Box Score	**45.9%**	**44.1%**	**44.2%**	**47.2%**	**51.0%**	**8.1%**
Will certainly visit	22.4%	21.6%	21.4%	22.3%	23.9%	**7.2%**
Very likely	23.5%	22.5%	22.8%	24.8%	27.0%	**8.8%**
Somewhat likely	26.2%	25.2%	27.4%	25.7%	24.0%	**-6.5%**
Somewhat unlikely	13.8%	14.6%	14.4%	12.7%	11.5%	**-9.0%**
Very unlikely	8.3%	8.6%	8.1%	7.3%	6.6%	**-9.7%**
Will not visit	5.7%	7.5%	5.9%	7.2%	6.9%	**-3.9%**

Likely to Visit the USA – by Market
(% "very likely" or "certain" to visit the USA in next 2 years

	2018	2019	2020	2021	2022	% CHNG 2020-2021
India	76.4%	74.1%	71.3%	81.5%	82.4%	1.1%
Brazil	65.4%	66.1%	68.2%	78.8%	82.0%	4.1%
Mexico	69.2%	70.0%	63.0%	71.3%	75.0%	5.3%
China	68.9%	58.6%	54.5%	48.1%	63.9%	32.7%
Canada	57.6%	54.3%	56.9%	47.6%	60.8%	27.6%
Colombia	-	-	-	-	56.6%	-
Argentina	31.3%	31.4%	34.6%	57.5%	55.5%	-3.5%
Italy	39.1%	37.6%	35.6%	44.1%	49.6%	12.5%
United Kingdom	38.7%	38.4%	41.9%	32.8%	46.5%	42.0%
Germany	44.4%	38.1%	36.8%	39.5%	43.5%	10.1%
France	30.6%	28.9%	29.8%	32.4%	41.1%	27.0%
South Korea	34.0%	32.0%	33.9%	39.0%	38.3%	-1.9%
Japan	26.8%	33.7%	29.5%	31.6%	28.9%	-8.7%
Netherlands	21.4%	18.3%	26.2%	24.1%	22.5%	-6.7%
Australia	37.3%	34.2%	34.3%	32.0%	18.0%	-43.8%

TIMING OF FUTURE VISIT TO USA



Timing of Future Visit to the USA – by Market

	First Half of 2022	Second Half of 2022	First Half of 2023	Second Half of 2023	2024 or later
India	29.0%	36.8%	15.1%	8.1%	3.8%
Mexico	23.5%	39.1%	13.6%	13.0%	4.9%
China	22.3%	27.8%	16.8%	10.1%	7.4%
Canada	20.6%	30.3%	13.0%	10.6%	4.4%
Brazil	16.4%	35.1%	18.6%	13.6%	8.8%
United Kingdom	10.6%	21.4%	16.5%	12.6%	9.1%
Argentina	10.0%	22.8%	16.8%	18.4%	16.9%
Italy	8.0%	21.8%	16.1%	20.3%	14.1%
Colombia	7.8%	21.3%	15.5%	18.0%	16.9%
France	7.4%	18.1%	15.8%	18.3%	13.5%
Germany	6.3%	14.1%	15.8%	15.8%	16.0%
South Korea	5.0%	20.5%	21.6%	20.3%	15.5%
Netherlands	4.8%	11.5%	12.0%	12.9%	15.8%
Japan	3.8%	17.1%	13.5%	11.1%	13.0%
Australia	2.4%	8.9%	7.9%	7.3%	11.4%

DESTINATION TYPE EXCITEMENT INDEX

Destination Analysts
DO YOUR RESEARCH

Question: *Please think about the United States destinations you are MOST EXCITED TO VISIT. Use the 10-point scale where 10 = "Very excited" and 1 = "Not at all excited" to state how generally excited you are to visit each.)*

Legend: **Rank 1** **Rank 2** **Rank 3**

Destination Types Most Excited to Visit

(Avg. excitement score out of a possible 10 for each destination type)

	ARGENTINA	AUSTRALIA	BRAZIL	CANADA	CHINA	COLOMBIA	FRANCE	GERMANY	INDIA	ITALY	JAPAN	MEXICO	NETHER-LANDS	SOUTH KOREA	UNITED KINGDOM
U.S. National Parks	7.8	6.4	**8.6**	6.8	7.8	8.2	7.5	7.5	**8.4**	7.6	6.7	**8.4**	7.3	7.3	7.1
Cities or metropolitan areas	7.9	6.0	**8.6**	7.0	7.9	8.1	7.2	7.5	**8.7**	8.1	6.0	**8.4**	6.9	7.4	7.2
Beach destinations/resorts	7.9	5.3	**8.2**	7.3	7.9	**8.0**	6.7	7.3	**8.5**	7.2	6.2	8.0	6.4	7.6	6.8
Theme or amusement parks	7.9	4.8	**8.7**	6.2	7.8	**8.4**	6.6	6.4	8.4	7.1	6.2	**8.6**	5.7	7.3	6.1
Small towns, villages or rural destinations/ attractions	6.7	6.1	7.4	6.6	**7.5**	7.1	6.8	6.4	**8.2**	7.2	5.9	**7.8**	6.6	6.5	6.6
Mountain destinations/ resorts (including ski resorts)	7.4	5.2	**7.9**	6.2	7.4	7.4	6.5	6.1	**8.5**	6.7	5.6	**8.1**	6.2	6.3	6.4
Desert destinations/resorts	6.5	5.2	**7.5**	6.4	7.2	6.8	6.8	6.3	**8.1**	7.1	5.1	**7.6**	6.0	6.3	6.3

MOST COMPELLING CONTENT FOR PLANNING USA TRIP

Destination Analysts
DO YOUR RESEARCH

Content Important to Destination Decisions
(Top 3 content types that are most important to their decision to visit the U.S., by country)

Argentina
- 31.5% Hotels/lodging
- 28.0% Theme parks
- 27.4% Restaurants

Australia
- 29.4% Safety
- 28.5% Hotels/lodging
- 26.6% Transportation

Brazil
- 36.5% Shopping
- 30.4% Theme parks
- 29.9% Hotels/lodging

Canada
- 30.1% Restaurants
- 24.9% Hotels/lodging
- 20.4% Safety

China
- 28.1% Experience nature
- 23.3% Experience lifestyle
- 21.1% Sightseeing tours

Colombia
- 35.1% Restaurants
- 33.8% Theme parks
- 32.3% Hotels/lodging

France
- 24.3% National Parks
- 23.0% Experience nature
- 22.4% Restaurants

Germany
- 26.6% National Parks
- 25.5% Iconic attractions
- 23.5% Experience nature

India
- 26.8% Restaurants
- 25.0% Shopping
- 21.6% Entertainment

Italy
- 24.9% Museums
- 22.6% National Parks
- 22.1% Experience nature

Japan
- 28.1% Restaurants
- 27.8% Safety
- 24.6% Hotels/lodging

Mexico
- 29.1% Family fun
- 29.0% Theme parks
- 28.6% Restaurants

Netherlands
- 31.6% National Parks
- 30.0% Hotels/lodging
- 22.6% Historical attractions

South Korea
- 29.4% Hotels/lodging
- 27.8% Restaurants
- 20.0% Safety

United Kingdom
- 30.8% Restaurants
- 25.4% Hotels/lodging
- 20.0% National Parks

DESIRED FEELINGS ON A UNITED STATES VACATION

Question: *On your perfect United States vacation, how do you want to feel?*

TOP 10 MOST APPEALING AMERICAN DESTINATIONS

Destination Analysts
DO YOUR RESEARCH

	APPEALING	EXTREMELY APPEALING	TOP 3 BOX SCORE*
New York City, New York	29.9%	34.5%	**79.4%**
San Francisco, California	32.1%	28.3%	**77.3%**
Los Angeles, California	27.7%	32.7%	**76.7%**
Hawaii (anywhere in the state)	28.7%	30.1%	**75.3%**
Washington, DC	30.4%	24.8%	**73.8%**
Miami, Florida	27.1%	28.8%	**73.7%**
Niagara Falls, New York	28.8%	26.7%	**73.5%**
Orlando, Florida	26.0%	24.9%	**69.5%**
Boston, Massachusetts	28.2%	20.2%	**68.9%**
Las Vegas, Nevada	27.1%	24.0%	**68.8%**

Question: *Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation.*


THANK YOU

THANK YOU

Erin Francis-Cummings

SANTA MONICA
TRAVEL & TOURISM

TREVER CARTWRIGHT

Founder & Partner
Coraggio Group

THANK YOU

Trever Cartwright

WENDY KHEEL

Client Manager, Symphony
Tourism Economics

SANTA MONICA
TRAVEL & TOURISM

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

THE TRAVEL RECOVERY:
A STORY OF GREAT PROMISE BUT UNCERTAINTY

13th Annual Travel & Tourism Summit
Santa Monica Travel & Tourism

May 4, 2022

Wendy Kheel
Tourism Economics
wkheel@tourismeconomics.com

April 2022

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We combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients.

Tourism Economics, a subsidiary of Oxford Economics, serves over 50 travel destinations, companies and associations each year

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- SALES & MARKETING ROI
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- EVENT IMPACT CALCULATOR
- TRAVEL & ECONOMIC FORECAST
- DATA ANALYTICS & INSIGHTS

MAIN OBSERVATIONS:

RECOVERY DESPITE WORRIES

UNDERPININGS OF ECONOMY REMAIN STRONG

BUT, INFLATION, GAS PRICES, LABOR CONSTRAINTS, AND EXTENDED COVID-19…

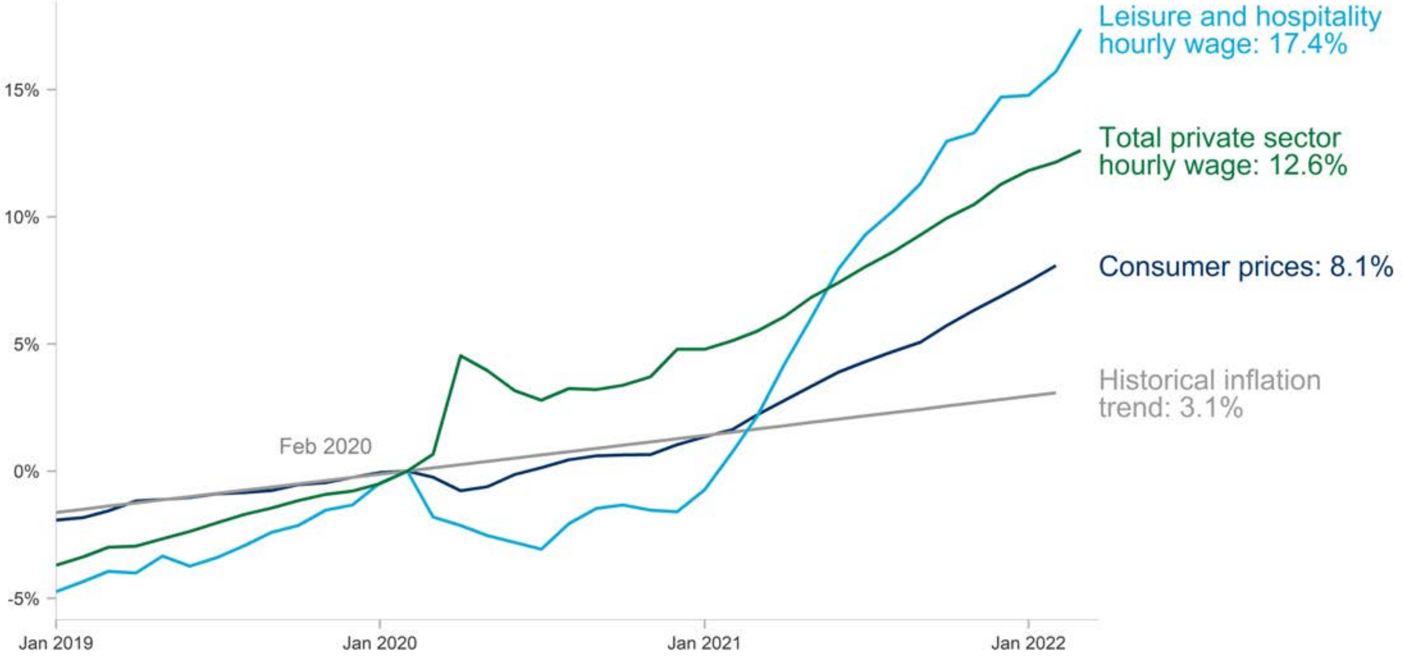
ALL PRESENT HEADWINDS AND RISKS

Unemployment rate from 14.7% to 3.6% in record time

So… wages are rising fast

Wage growth comparison

Cumulative increase since February 2020

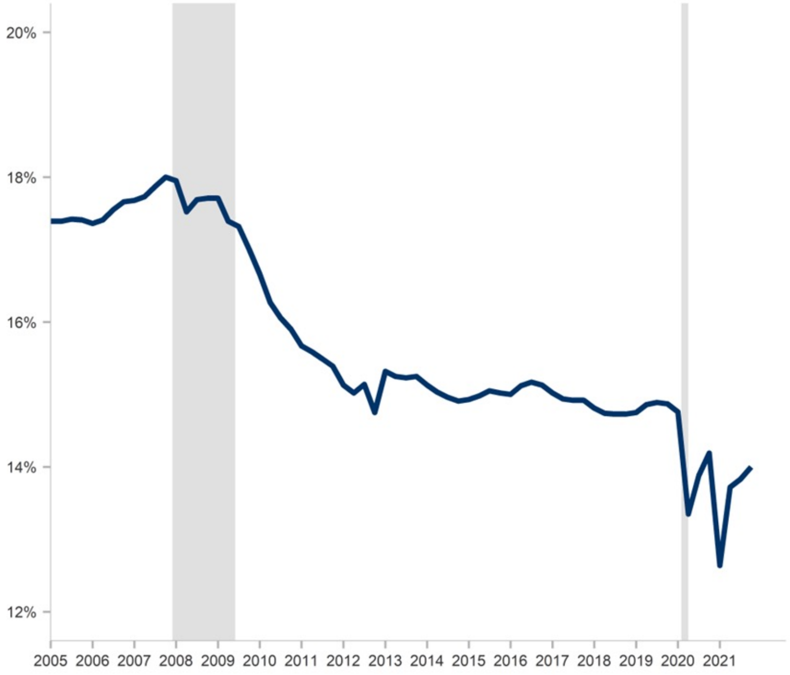


Note: Data shown through March 2022. Historical inflation trend measured since 2008. Consumer price inflation measured by PCE price deflator.Wage rates measure nonsupervisory positions. Source: BLS, BEA

Historically low debt burden…household net worth in good shape

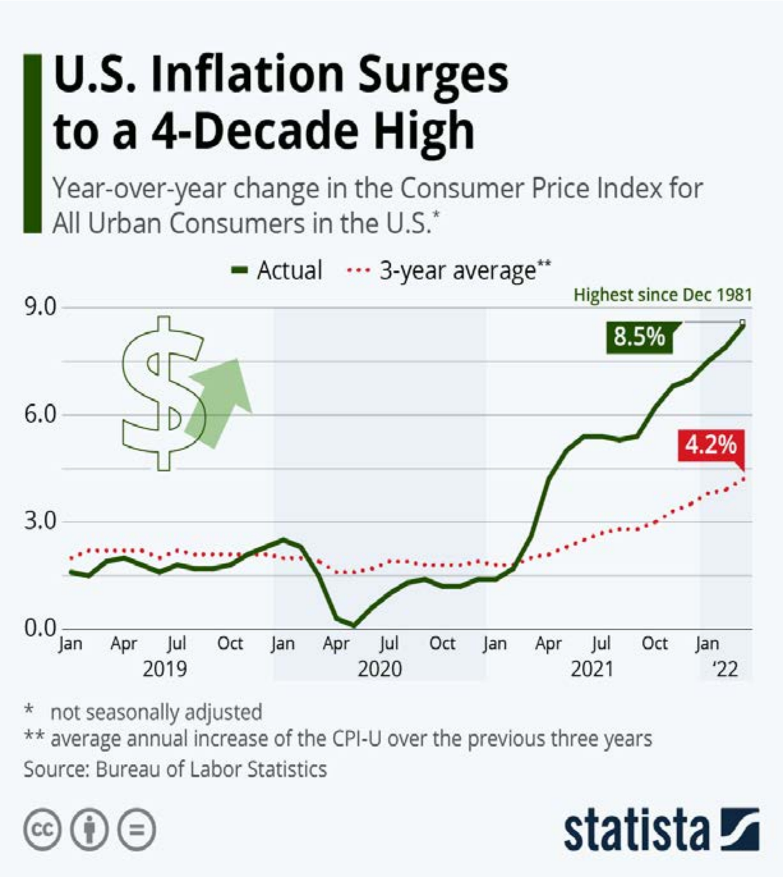
Household debt service

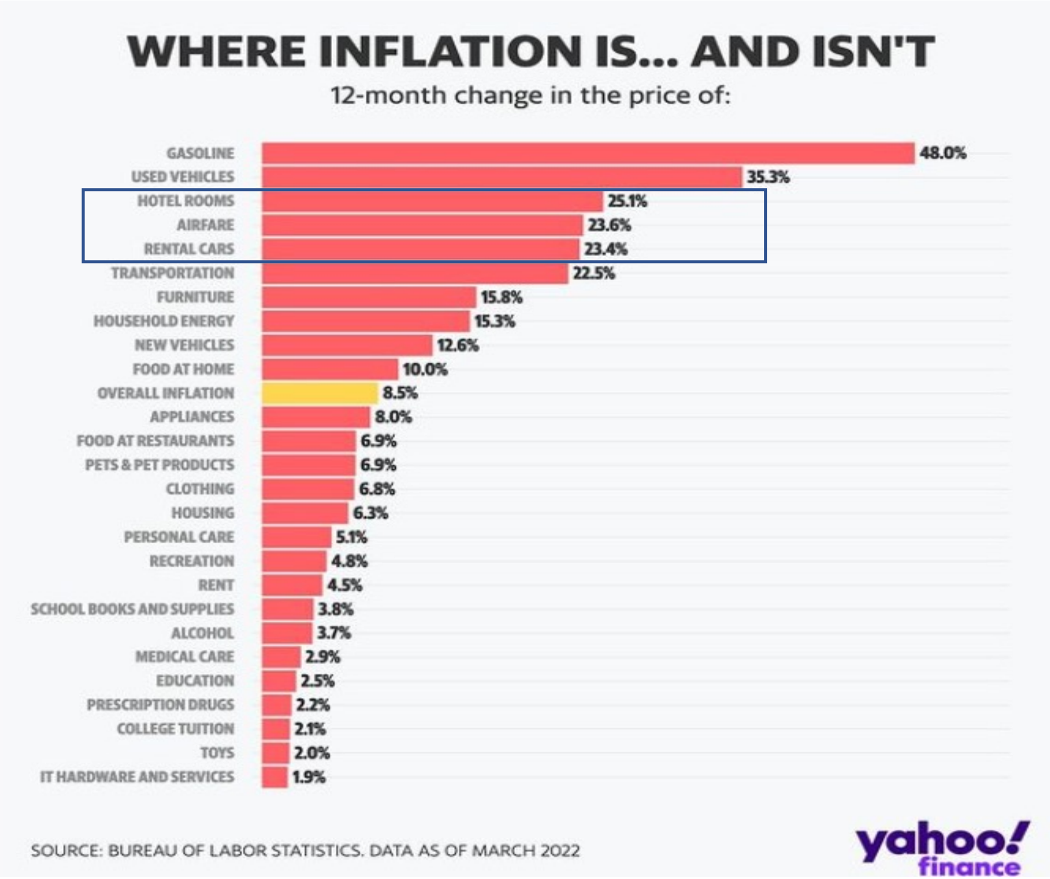
Financial obligations as ratio to disposable income



Note: Quarterly data through 2021Q4. Financial obligations ratio is the ratio of household debt payments, and payments such as rent and auto leases, to disposable income. Source: Federal Reserve, NBER

But persistent inflation

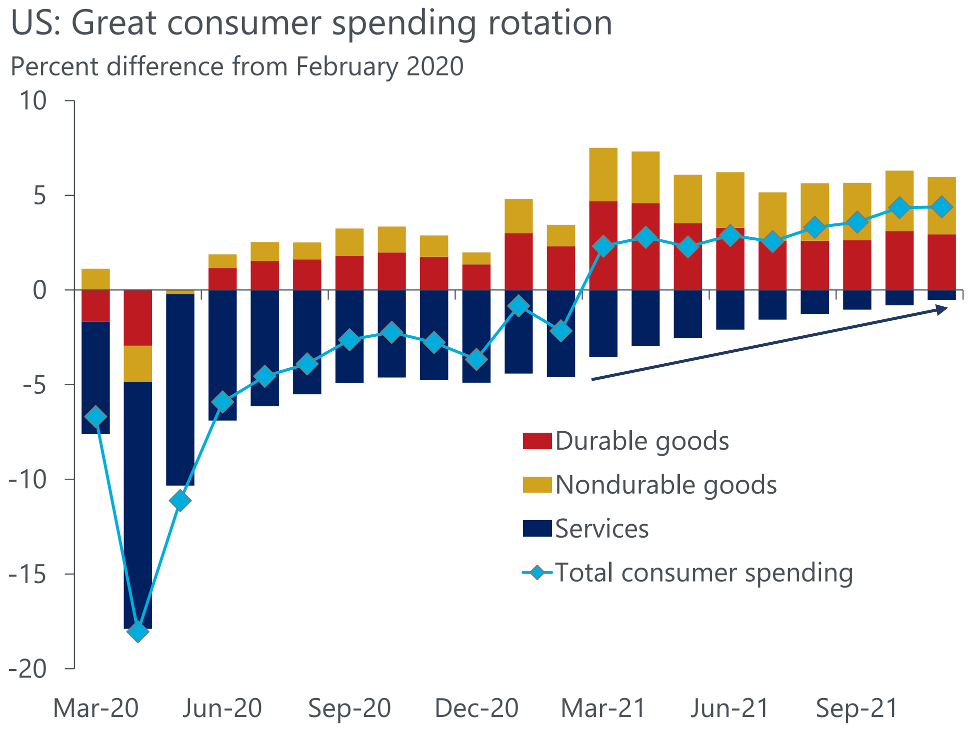




Consumers feeling uneasy

But having little bearing on their behavior

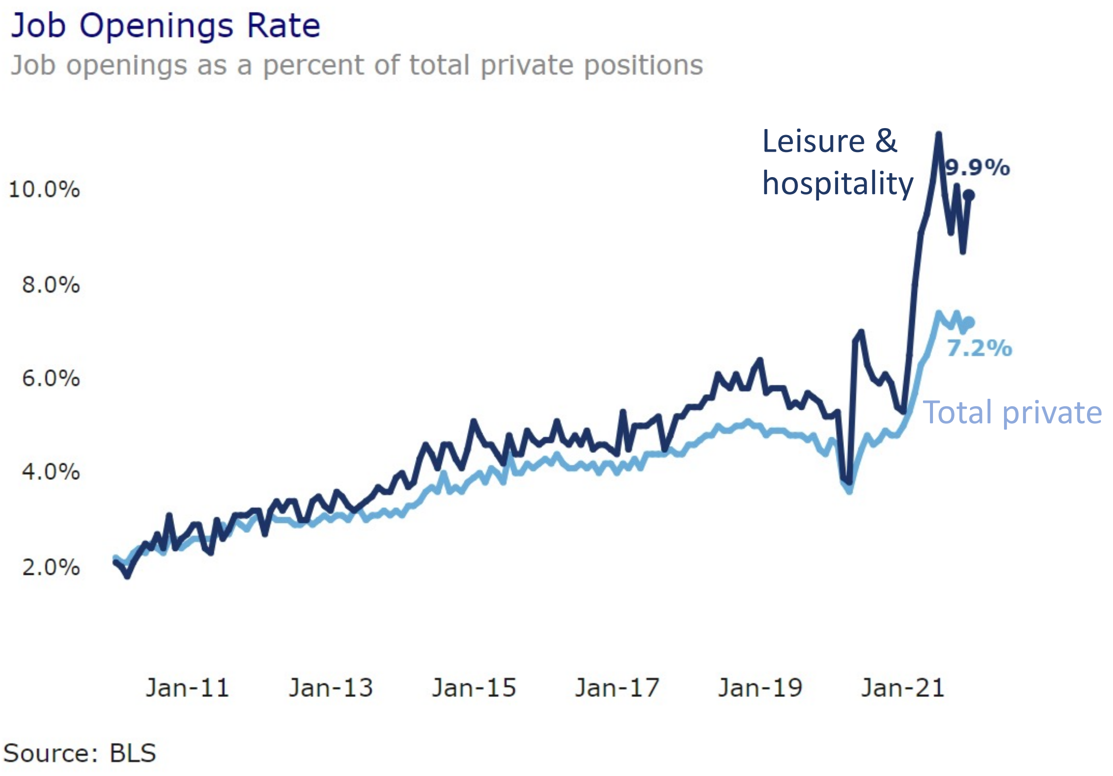
Services are rapidly gaining ground



Source : Oxford Economics/Haver Analytics

TOURISM ECONOMICS

Recovery constraint: Labor shortages



No immediate sign of easing (1.9 job openings per unemployed)

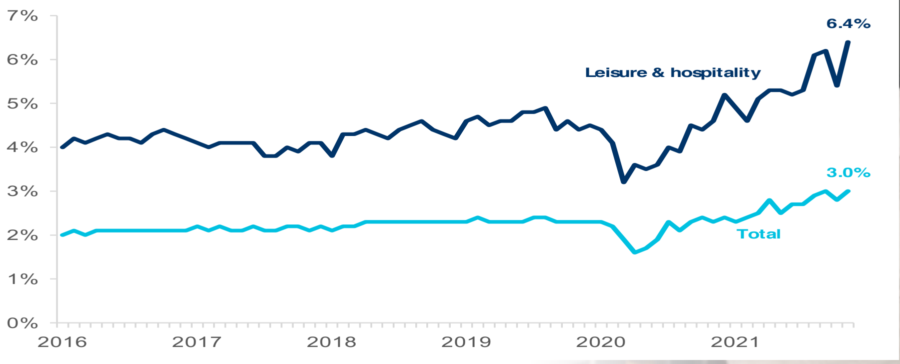
US: Historic struggle to attract and retain workers

The Great “Shift” - people switching jobs

- **4.5 million Americans quit** in November 2021 – highest rate in two decades
    - ➢ Top reasons given – low pay, no advancement opportunities, and minimal flexibility
    - ➢ 78% now employed, suggesting they quickly obtained new jobs
    - ➢ Travel industry employees disproportionately switched industry

Job quits rate

Share of quits as a percent of total employment

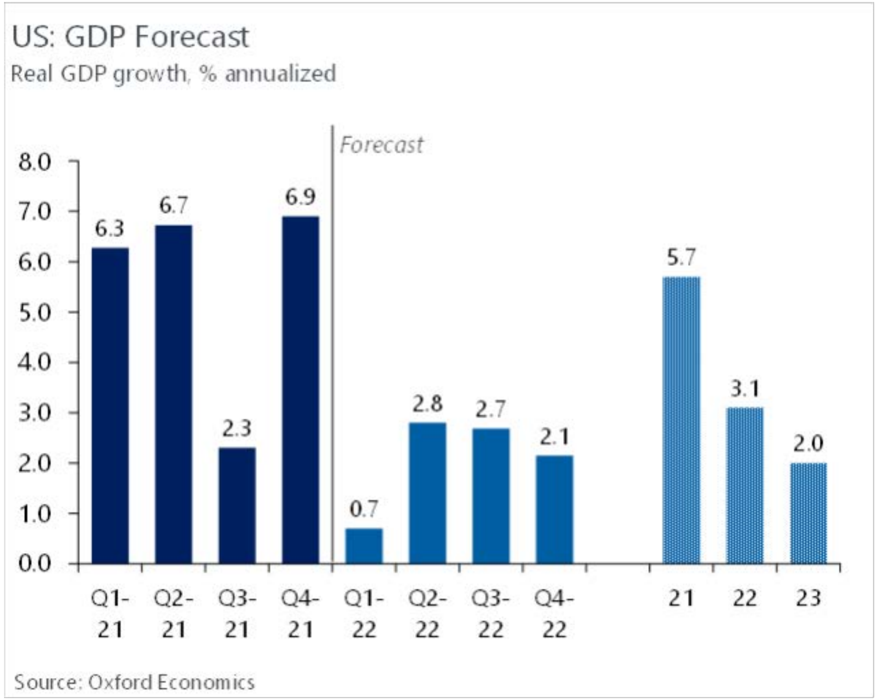


Source: BLS

Culmination of several labor constraints

- **Slowing immigration** – 2.4 million fewer immigrants of working age vs pre-2017 trends
- **Lack of seasonal workers** – H-2B visa has reached the cap until the Biden administration increases it
- **Record number of early retirements** – more people leaving the labor force than entering it
- **Lack of childcare** - Many, especially women, forced out of the workplace to care for children. Some by choice or necessity will not return
- **Entrepreneurs** – blossoming of “cottage industries” – new businesses started and grown from home
- **Drug crisis** – 860,000 prime working age men out of the work force due to opioid addiction

A slowing but deliberate economic outlook



GDP growth:

2021: 5.7%

2022: 3.1%

2023: 2.0%

Have a wonderful summer!

Thank you!

LAUREN SCHLAU

Founder & President

Lauren Schlau Consulting

Lauren Schlau Consulting

The Santa Monica Story

Yesterday, Today, Tomorrow

SANTA MONICA
TRAVEL & TOURISM

2022 SMTT Annual Outlook Forum
May 4, 2022

Lauren Schlau Consulting

- LSC supports leading destinations and travel providers with research services and insightful analysis
- 2022 is our 30th year in operation; been working with SMTT since 1984
- LSC partners with SMG as *Travel Analytics Group* TAG integrating *research and strategy*

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Welcome; "Whales Watching" in Santa Monica…

"I guess we'll never know why they beach themselves?"

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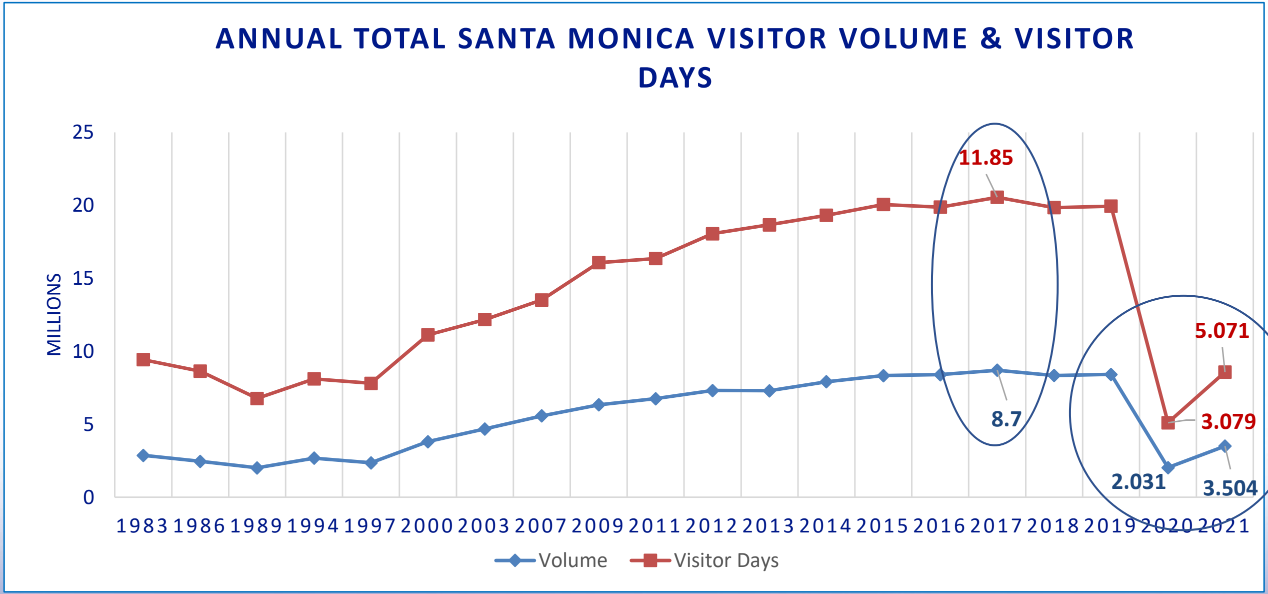
Context is Key
Comparing Current to Recent Years

- Santa Monica visitation peaked in 2017 with 8.7 million visitors and 11.9 visitor days.
- Softening evidenced in 2018 and 2019, especially international
- COVID plunged visitation in 2020, recovery starting in 2021



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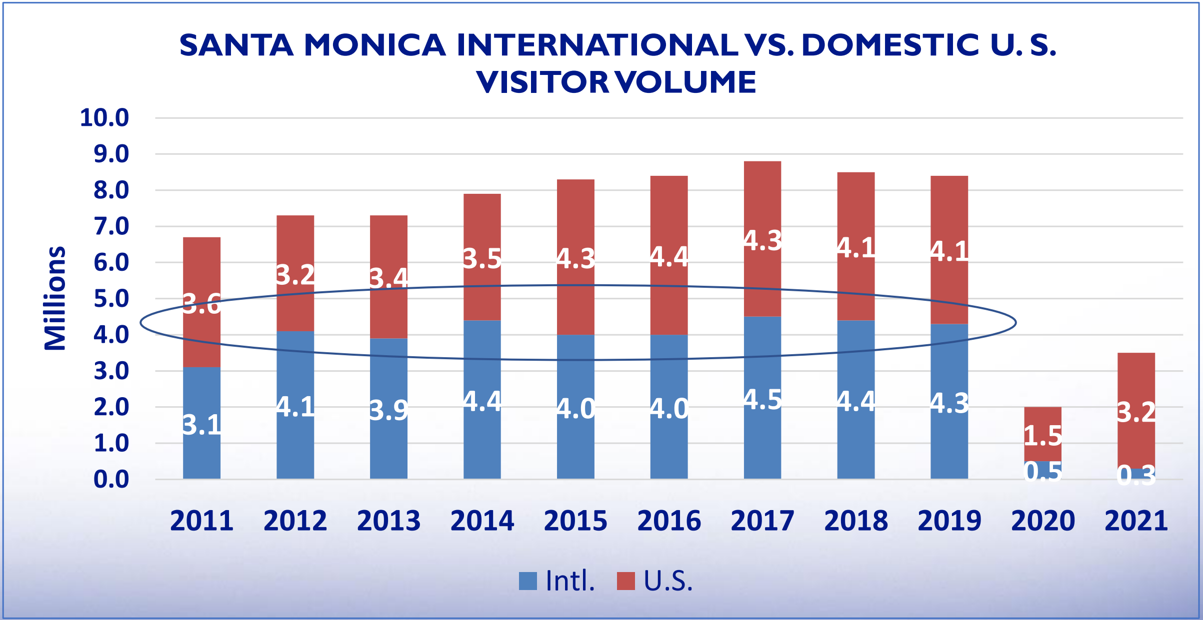
International of Key Importance to Santa Monica

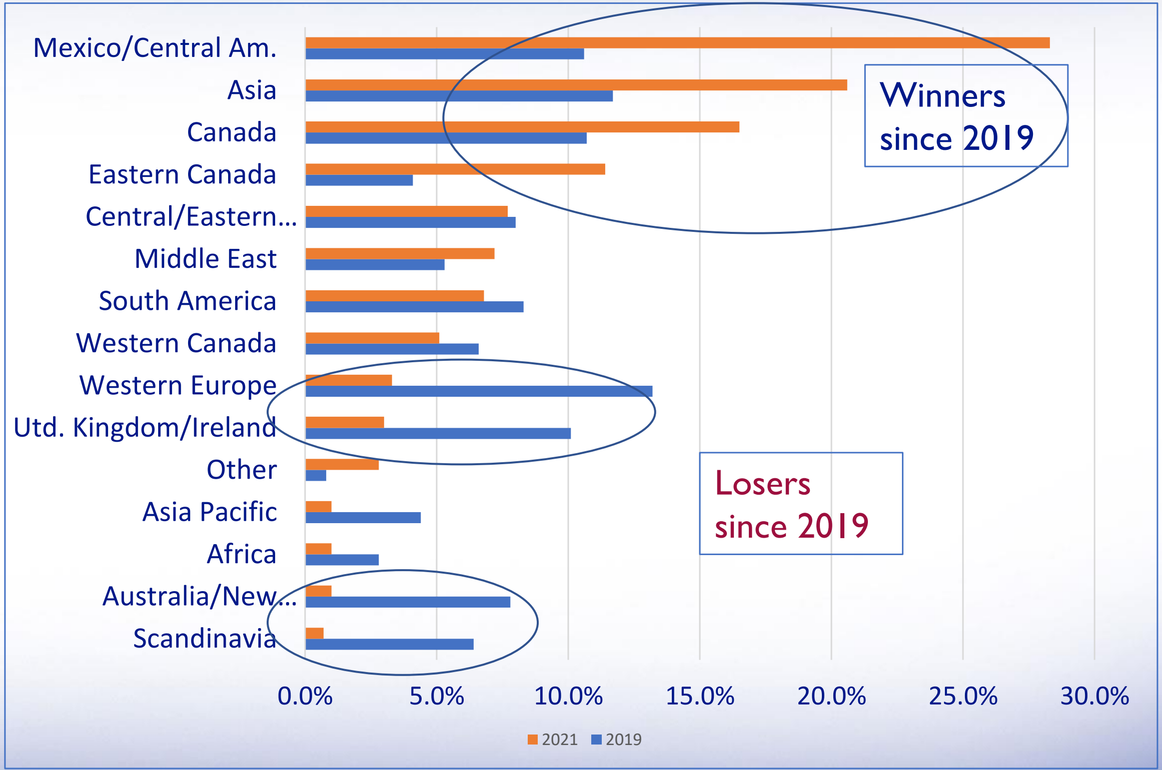
- International visitors historically account for 50%+ of Santa Monica volume, days and spending, but was 25% of visitation in 2020 and 9% for 2021.
- That compares to 6% of visitor volume for California and 22% for Los Angeles County in 2019.



Santa Monica Top International Markets

- In 2021 top international feeder markets: Mexico, Asia Canada.
  - Asia mainly India

- They displaced Western Europe, UK, So. America and AUS/NZ from 2019.
  - Asia mainly Japan, & Asia Pacific



Santa Monica in Recovery (“*off life support*”)

- Visitor Volume and Days Up from 2020, still well below 2019
- 2021 visitor length of stay between 2019 and 2020 length
- During the pandemic Santa Monica the *main destination* for more visitors; therefore a higher share stayed overnight and a bit longer.

Indicator	2021 Indicator	2021 % Change Fr 2020	2020	2019
Total Number of Visitors	**3,504,048**	72.5%	2,031,100	8,413,100
Average Days Length of Stay (all visitors)	**1.45**	-4.7%	1.52	1.37
Total Visitor Days	**5,071,296**	64.7%	3,079,900	11,528,200
Percent of Day (only) vs. Overnight Visitors	**72% / 28%**		71% / 29%	86% /14%

Historically day visitors = 80%+ of total

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Tourism Generated Spending & Taxes are Key to Santa Monica's Economy & Employment Base

- 2021 spending reached $750 million, +65%, still 60% below 2019
  - 2019 visitor spending approached $2.0 billion
- 2021 the City realized $45 million in visitor lodging and sales taxes
  - 2019 the City realized $72 million in visitor paid lodging and sales taxes
- These taxes pay for equivalent services to local households, averaging $937 in 2021
- Visitor activity and spending supported nearly 5,800 local jobs in 2021

Indicator	2021 Number	2021 % Change Fr 2020	2020	2019
Total Annual Visitor Spending	**$750,259,292**	65.3%	$453,820,900	$1.89 billion
Per-capita Daily Visitor Spending	**$148**	.7%	$147	$164
Hotel Tax Revenue to City (from non-local visitors)	**$41,927,620**	124.2%	$18,698,400	$58,315,740
Visitor Retail Sales Tax Revenue to City	**$3,730,376**	20.7%	$3,090,100	$13,875,500
Equivalent tax per SM household from visitor spend	**$937**	106.8%	$453	$1,496
Santa Monica Jobs Supported by Tourism	**5,747**	85.7%	3,095	12,010

Hotels Seeing Moderate Growth in Occupancy (Demand) with Surging Room Rates

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- Hotels essentially closed as of April 2020; many, not all reopened in August
  - At first, demand shift to younger guests, on leisure/vacation trips, from L A region, California, western states
  - During this period (and still), hotel demand stronger than short term rentals (STR)
- With vaccinations as of January 2021, demand building, shifting to broader long-haul U. S. markets, older and higher income travelers.
- 2021 occupancy up 25% from 2020 with all hotels operating; some business and group demand
- Rates surging! 2021 Record ADR = $312 (unlike 2008-2010 recession when hotels discounted)
- With higher ADRs, hotel tax growing much faster than demand and visitor spending

Indicator	2021 Number	2021 % Change Fr 2020	2020	2019
Hotel Occupancy Rate	**51%**	24.4%	41%	82.5%
Average Hotel Daily Room Rate	**$312**	20.9%	$258	$274
Hotel Tax to City (non-local visitors)	**$41,927,620**	124.2%	$18,698,400	$58,315,740

SM hotel occpy. at 80%+ for years.

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Visitors Have Changed!

Shift to:

- More from U.S.
- SM main destination
- Not flying to arrive in So. Cal.
- Fewer for pleasure/vacation or business purposes
- More staying overnight
- More staying in SM hotels
- Shorter overnight stays
- Lower per-capita spending
- More people per group (families)
- Younger
- Lower household income

Visitor Profile Characteristic	2021	2020	2019
International Visitor share (of total visitors)	**9.2%**	24.9%	51%
U.S. Resident visitor share (of total visitors, excl. CA)	**60.8%**	42.6%	30%
California Resident share (of total visitors)	**30.0%**	32.6%	19%
Mainly visiting Santa Monica for pleasure/vacation	**48%**	42%	56%
Mainly visiting Santa Monica for business/meeting	3%	3%	4%
Santa Monica ***main*** trip destination	**31%**	30%	16%
Arrived in Southern California by commercial air	**34%**	47%	68%
Day Visitor / Overnight Visitor Share in Santa Monica	**72% / 28%**	71% / 29%	86% /14%
Staying in a Santa Monica hotel: all Visitors / overnight visitors	**23% / 80%**	24% / 83%	10% / 69%
Avg. stay in Santa Monica - overnight visitors (nights)	**2.6**	2.8	3.6
Avg. daily per-person spending in SM (all visitors)	**$148**	$147	$164
Average travel group size (persons)	**3.5**	2.5	2.5
Median age (respondent)	32	35	40
Median annual household income	**$81,400**	$76,000	$96,500

What to Expect
Where Do We Go

Expect in 2022

- Continued popularity of Santa Monica destination worldwide
- Continued recovery from strong U.S. visitation, international slowly recovering (uneven, dep. on country policies and COVID situation)
  - LAX reported first 1 million Int'l. arrivals last month since COVID
  - Potential plateauing of U.S. visitation as more U.S. residents traveling out of country
- International marketing will accelerate and be increasingly competitive as destinations seeking international visitors will also be marketing to rebuild share and volume
- Steady recovery in business transient and group travel
- Continued rise in hotel room rates; slower *rate* of growth

Where to Go From Here

- Shift the paradigm from *volume* to *yield*, i.e., visitors who stay longer, do more activities and spend more in Santa Monica
  - Emphasis on overnight, longer-haul visitors
- Growing attention to *quality of destination experience* for both residents and visitors
  - Recognizing the importance the intersection between visitors and residents

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MISTI KERNS, CMP CDME

President & CEO

Santa Monica Travel & Tourism

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How to Work with SMTT

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Santa MoniCARES
TOURISM SUPPORTING OUR COMMUNITY

Ellis O'Connor
Principal / Asset Manager,
MSD Hospitality
(Fairmont Miramar)

Julia Ladd
Assistant Vice President for
Property Management,
Macerich

Raphael Lunetta
Owner/Partner and Chef
Proprietor, Lunetta &
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Santa MoniCARES
TOURISM SUPPORTING OUR COMMUNITY

Santa MoniCARES is a coalition of representatives from Santa Monica Travel & Tourism and tourism community partners with a mission to harness the hospitable nature and generosity of Santa Monica's tourism industry and provide support to local non-profit agencies.

Learn more and donate at
SantaMoniCARES.com






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