



the independent integrated agency

Search Insights report

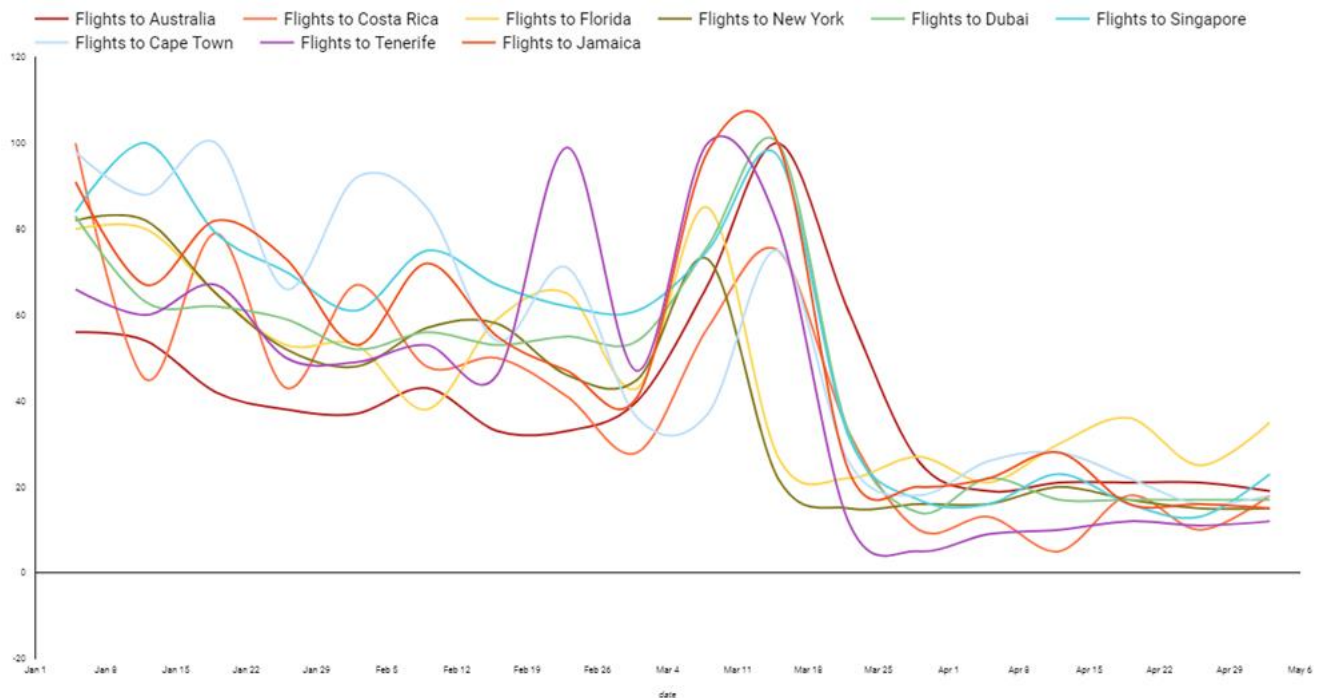
Four Communications has conducted a destination search term analysis on flight and holiday options, looking at average Google interest during the COVID-19 period. Interest is proportional and not volume based, so it gives a solid base in order to identify trends in market. 100 points notes peak interest within a defined period, with interest scaled against this index on a sliding scale, according to actual interest in that term.

This weekly update provides insight into trends and possible markers for market development. Search data is based on trends from January 1st, 2020 through May 6th, 2020.

A) Flight and Holidays Search – Ups and Downs

There appears to be some consistency in flight search since the last week of April; interest seems to have balanced out with a few slight variations. The chart below shows that search interest for the destinations reviewed is low but relatively consistent, indicating a new base line for demand. We would therefore anticipate interest to increase as the UK continues to ease lockdown restrictions. It is also intriguing to note that there are now fewer variations between flight searches over the given weeks, again indicating a new baseline.

Florida search interest is of note; it has held out despite the U.S. often being headline overseas news in the UK for COVID-19, although that is now diminishing as news of restrictions easing reaches the UK. Florida and theme parks offer escapism and a dream holiday, so this may well be driving interest.



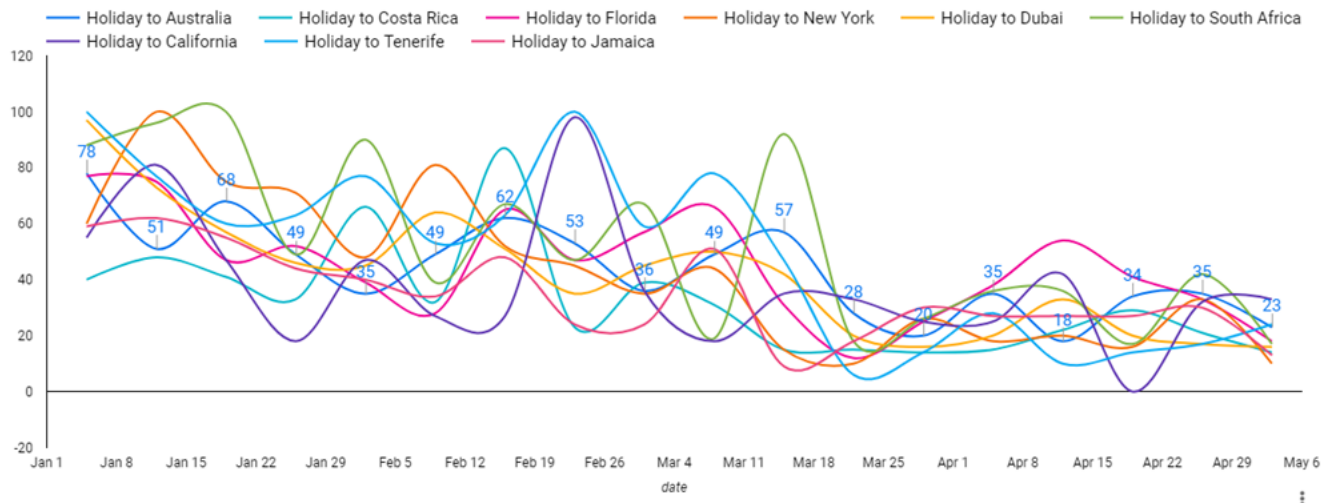
Tenerife, Spain, a country dramatically affected by COVID-19 had a dramatic decline in interest as news broke of the situation in Spain. It is now pleasing to see a gradual increase in interest; this sustained and measured increase bodes well for the future in a popular British holiday destination.

B) Winning holiday destinations

Using the same approach for holiday searches as we did for flights shows that these terms showed large variances in interest from the start of the year. January and February are normally key booking months for holidays, but there were large variances week to week from the start of 2020. The start of 2020 was a good booking period, but the trade did report variances in weekly sales too.

As news of COVID-19 hit the UK and the lockdown was announced, interest dropped from March.

Two U.S. destinations are worthy of note; as with flight searches, Florida has fared well in these tough conditions. While California took a large drop in interest mid-April, only to bounce straight back, which highlights the power of news coverage on destinations in the UK, as mentioned in previous weekly updates.



C) Is a trend developing?

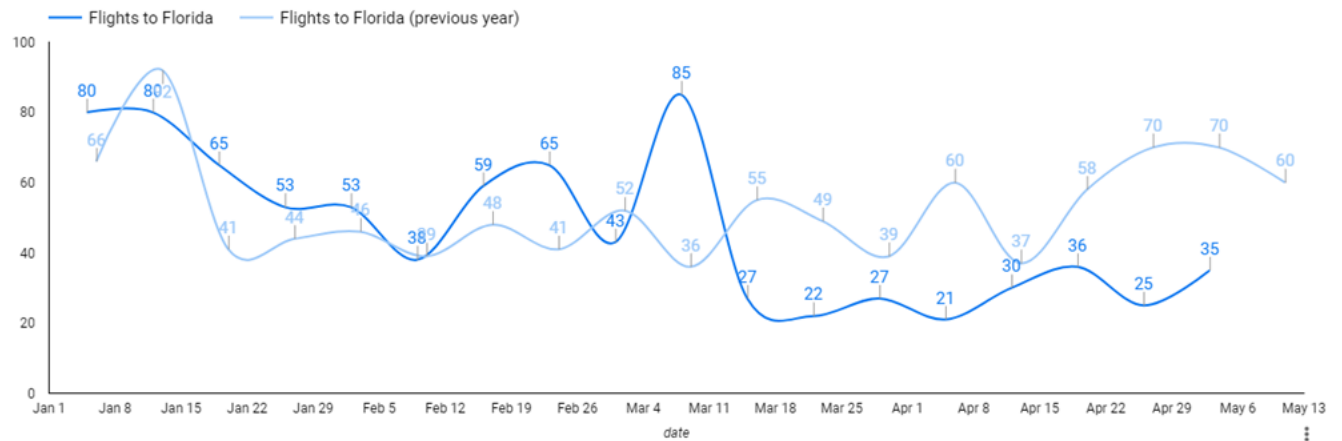
It appears we are seeing a base line in flight and holiday search. Industry analysis suggests that consumers are consuming content – they are hungry for travel ideas and inspiration, but the desire to actually book is low at this point, as our data suggests. From conversations with the trade, we know consumers are rebooking/making new bookings for late 2020 and 2021, which is a good sign. Consumers are looking to ride out the immediate storm and are planning.

Thus, it is imperative to have 2021 rates available and in market; consumers are more likely to book their dream holiday for 2021. The actual booking window is still 'TBD' but as we hopefully navigate a safe course away from COVID-19, that booking window will open and everyone in travel must be prepared.

D) What does this mean to Florida?

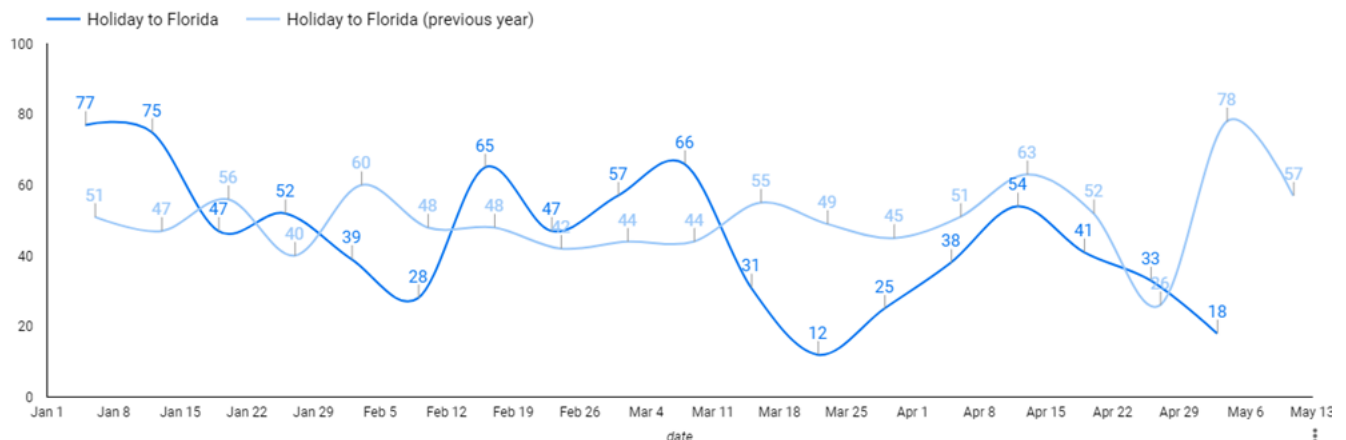
Florida flight search is down 11.2 percent since the start of the year compared to 2019. Since the start of UK lockdown, (March 23rd) search for Florida flights is down 47.6 percent on average, which compared to flight search for Italy and Spain is a robust figure. Flight search for Italy and Spain has been down between 80-90 percent while media exposure has been quite consistent between the three.

Interest appears to have bottomed out which is positive – independent travel and the draw of the theme parks, dreaming and escapism seem to be driving demand.



For holidays to Florida, search interest is down 11.1 percent since January 2020, year over year. Since the start of UK lockdown, (March 23rd through May 10th) search for Florida holidays is down 33.8 percent on average. The next few weeks will feed into the wider narrative as we expect to see interest grow as nations/states start to ease restrictions.

In comparison, holiday search to Thailand is down 75.3 percent, Rome down 83.5 percent, Dubai down 54.4 percent and Tenerife in Spain is down 62.7 percent for the same period. Therefore, Florida holiday search is holding up particularly well after much media focus in the UK.



Other trends and research this week:

Meetings industry to change?

Whether temporary or permanent, COVID-19 is dramatically affecting all travel sectors – and it that is certainly true for meetings and events. A recent survey featured in MIT Magazine (research contacted by BMA House) highlighted that 73 percent of organisers confirmed that they expect to increase online meetings. 89 percent of delegates said that their attendance would increase with the rise in online meetings. Face to face will still be important, however, technology may drive growth and development in this sector. Read more [here](#)

How COVID-19 has changed shopper behaviour

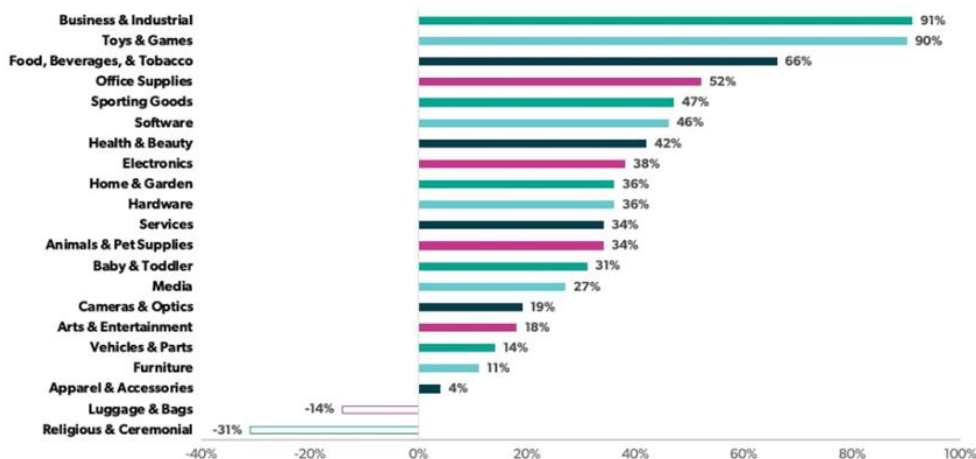
Reviewing over 6,200 retailers and customers globally, BazaarVoice has identified how consumers are currently shopping and what their priorities are in the decision making process. Looking at page views per category, you can see that business/industrial, toys & games and food, beverages and tobacco saw unrepresented growth year on year; April 2019 versus 2020.

This really shows how COVID-19 has changed the landscape, but what is very interesting is the change in buyer purchasing influencers. According to their survey, before the pandemic, respondents' main priorities when purchasing were quality (48 percent), price (47 percent) and brand (24 percent). Now, they are mostly focused on availability (49 percent), price (36 percent) and quality (34 percent).

Availability is a key factor in travel with UK consumers looking at departure travel from September/October 2020 into 2021; however, many airlines, hotel and other supplier rates/stock isn't yet available for summer 2021. As the market returns, the ability to provide rates, availability and booking confirmations will be all the more important to succeed. Read more [here](#) (sign in required).

Page views by category, global

Year-over-year percent growth — April 1st– 23rd, 2020 vs. April 1st– 23rd, 2019



Source: Bazaarvoice Network data

bazaarvoice.