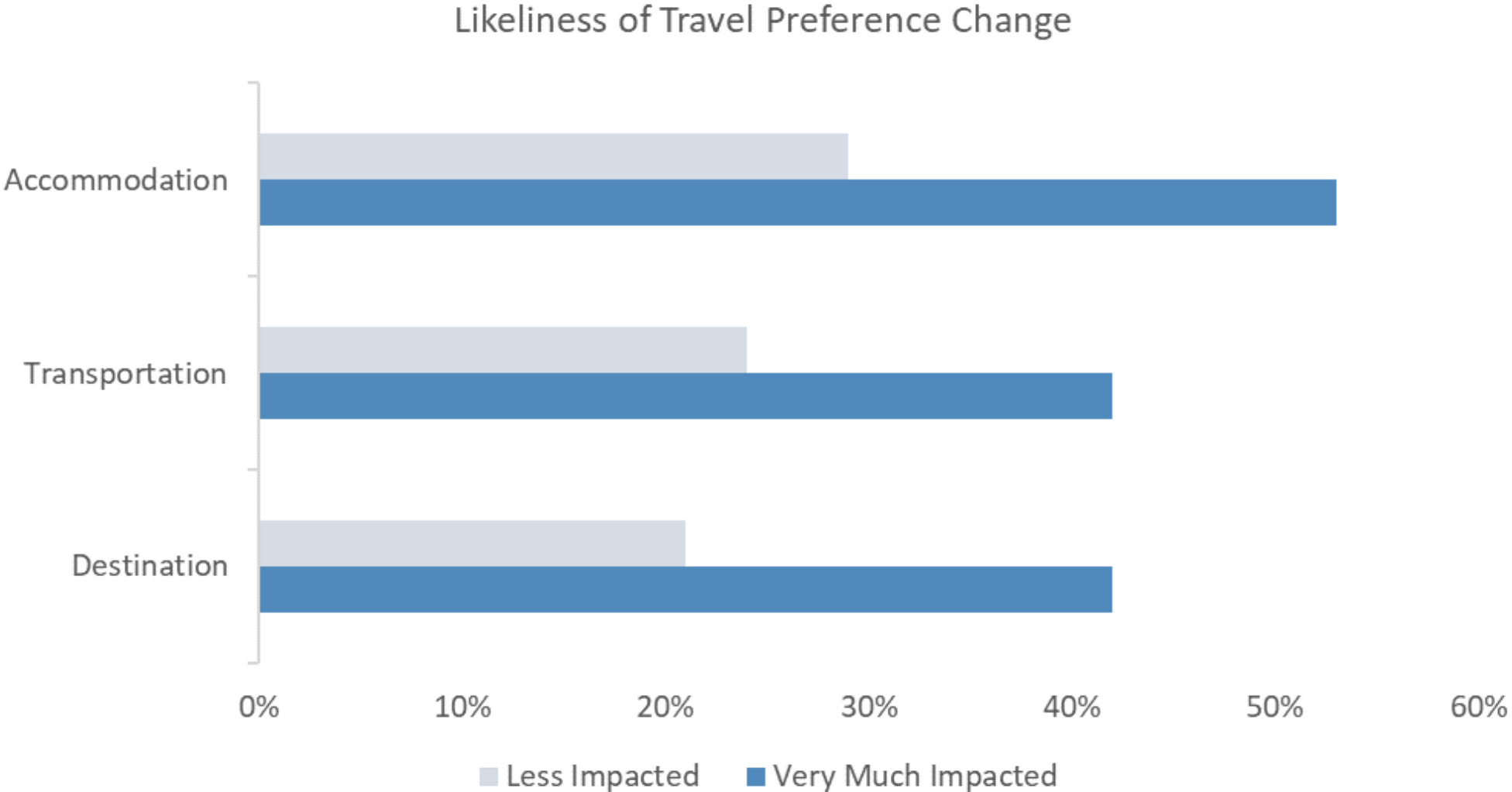


Localized Travel trends (U.S.)

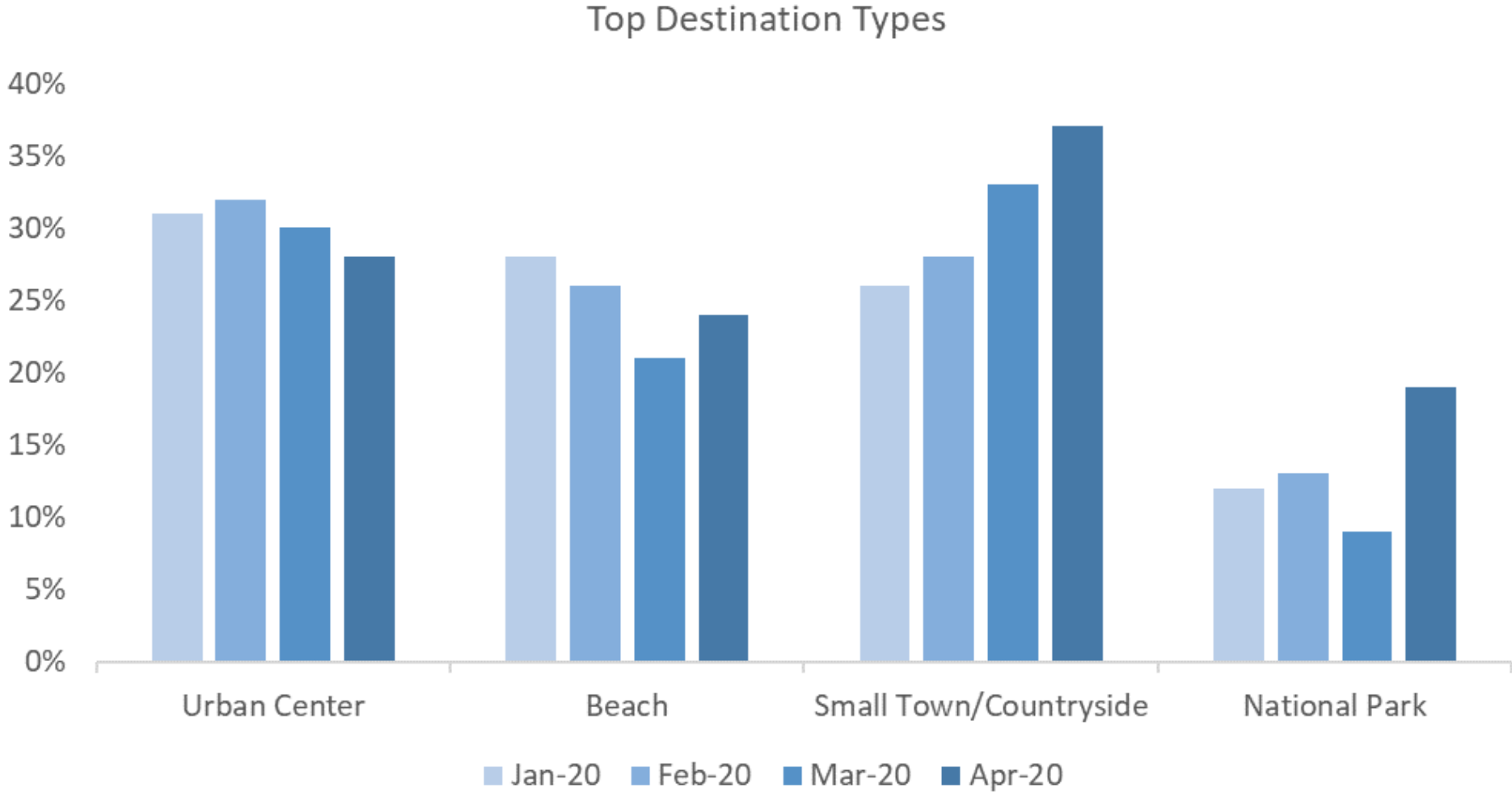
Last Update:
5/28/2020

Expected travel preferences greatly swayed by COVID-19



Source: Skift Research sentiment survey, May 2020, N=~1000

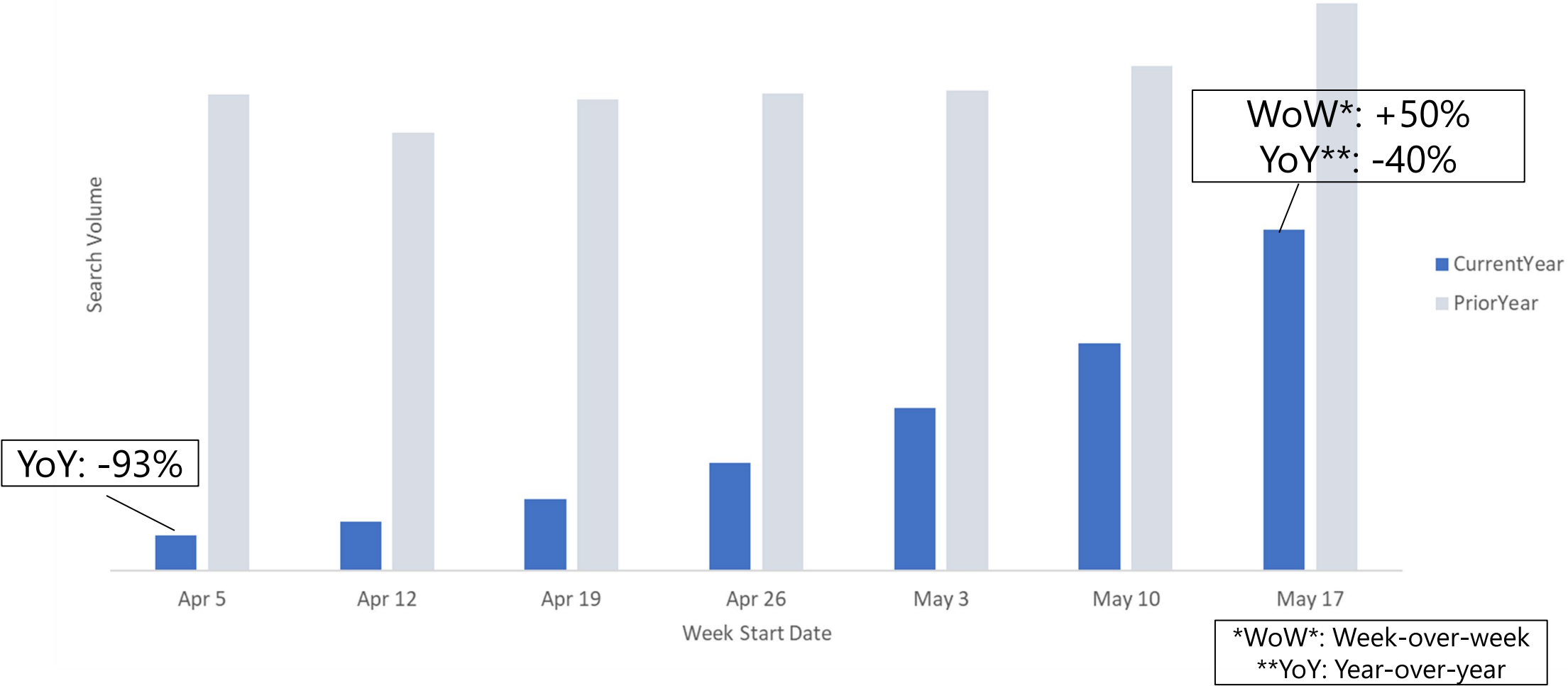
Travelers are shifting to small towns and more remote areas



Source: Skift Research sentiment survey, May 2020, N=~1000

Low population cities have rapidly growing demand

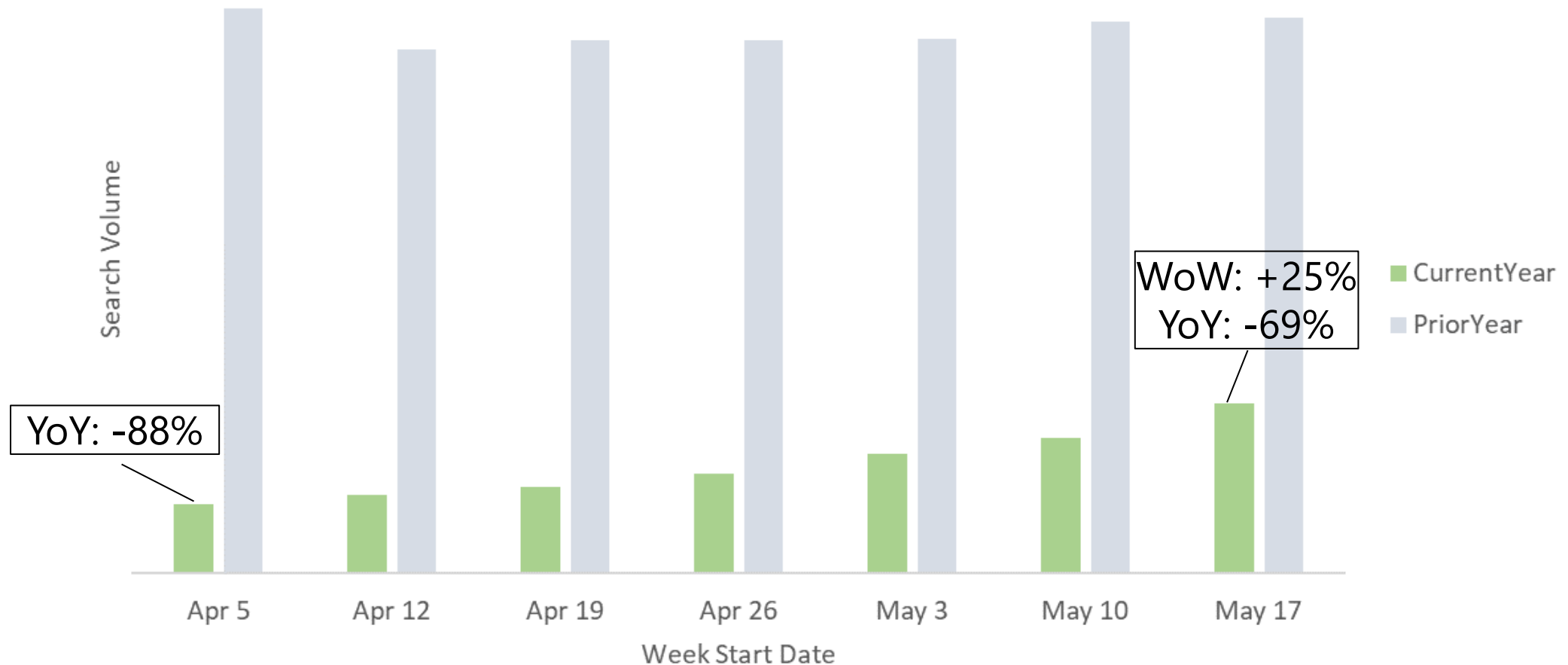
'accommodations' queries + destinations with smaller populations (e.g. Myrtle Beach, Destin, Scottsdale)



Source: Microsoft Advertising Internal Data, populations under 1 million

Denser destinations are seeing slower demand growth

'accommodations' queries + destinations with large populations (e.g. Nashville, Seattle, Chicago, LA)

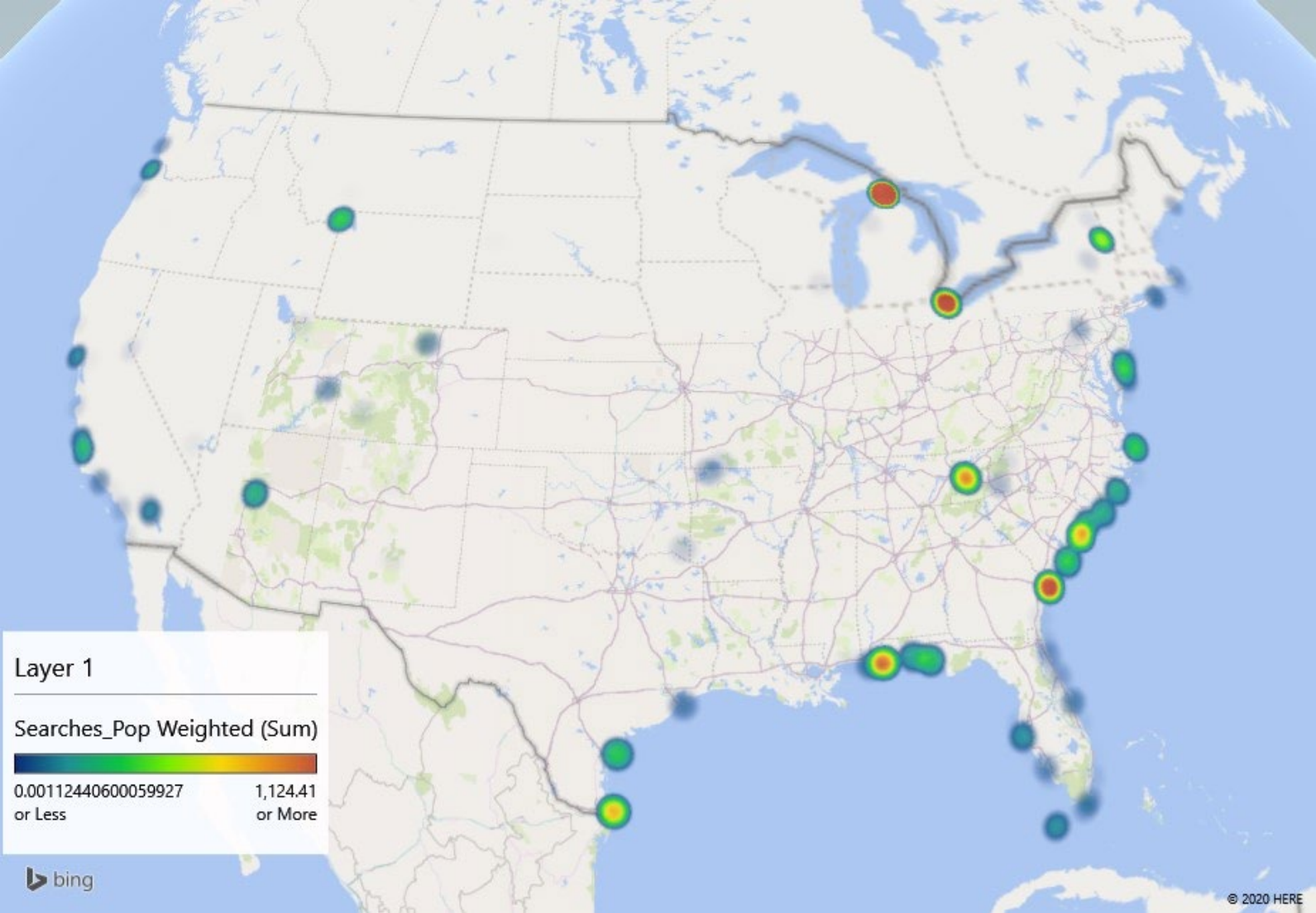


Key drivers: low population destinations with high query interest

City	State	% of Apr 5-11 Search Volume	
		Wk of May 10	Wk of May 17
Port Aransas	Texas	270%	434%
Orange Beach	Alabama	309%	393%
Hilton Head Island	South Carolina	285%	388%
Carolina Beach	North Carolina	175%	276%
Galveston	Texas	168%	272%
Destin	Florida	187%	265%
Panama City Beach	Florida	189%	225%
Corpus Christi	Texas	106%	221%
Gulf Shores	Alabama	153%	213%
Nags Head	North Carolina	178%	207%
South Padre Island	Texas	126%	195%
Traverse City	Michigan	40%	189%
Ocean City	Maryland	68%	179%
Gatlinburg	Tennessee	113%	175%
Lake George	New York	63%	170%
Biloxi	Mississippi	69%	151%
Rehoboth Beach	Delaware	63%	148%
Branson	Missouri	58%	137%
Pismo Beach	California	78%	135%
Tybee Island	Georgia	77%	125%
Flagstaff	Arizona	80%	119%
Cape May	New Jersey	103%	113%
North Myrtle Beach	South Carolina	76%	112%
Pigeon Forge	Tennessee	65%	111%
West Yellowstone	Montana	70%	111%

- Cities along the Gulf of Mexico are very trendy now
- Coastal towns in the southern Atlantic coast are also popular lately

Similar trends seen when weighted by population



City	State	Index
Mackinac Island	Michigan	3385.5
Put-in-Bay	Ohio	1551.2
Tybee Island	Georgia	1321.9
South Padre Island	Texas	866.8
Pawleys Island	South Carolina	829.1
Lake George	New York	614.1
Orange Beach	Alabama	599.5
Gatlinburg	Tennessee	563.7
Pigeon Forge	Tennessee	441.5
Gulf Shores	Alabama	432.4
West Yellowstone	Montana	423.3
Nags Head	North Carolina	415.9
Port Aransas	Texas	388.6
Panama City Beach	Florida	356.3
Folly Beach	South Carolina	276.4

Source:

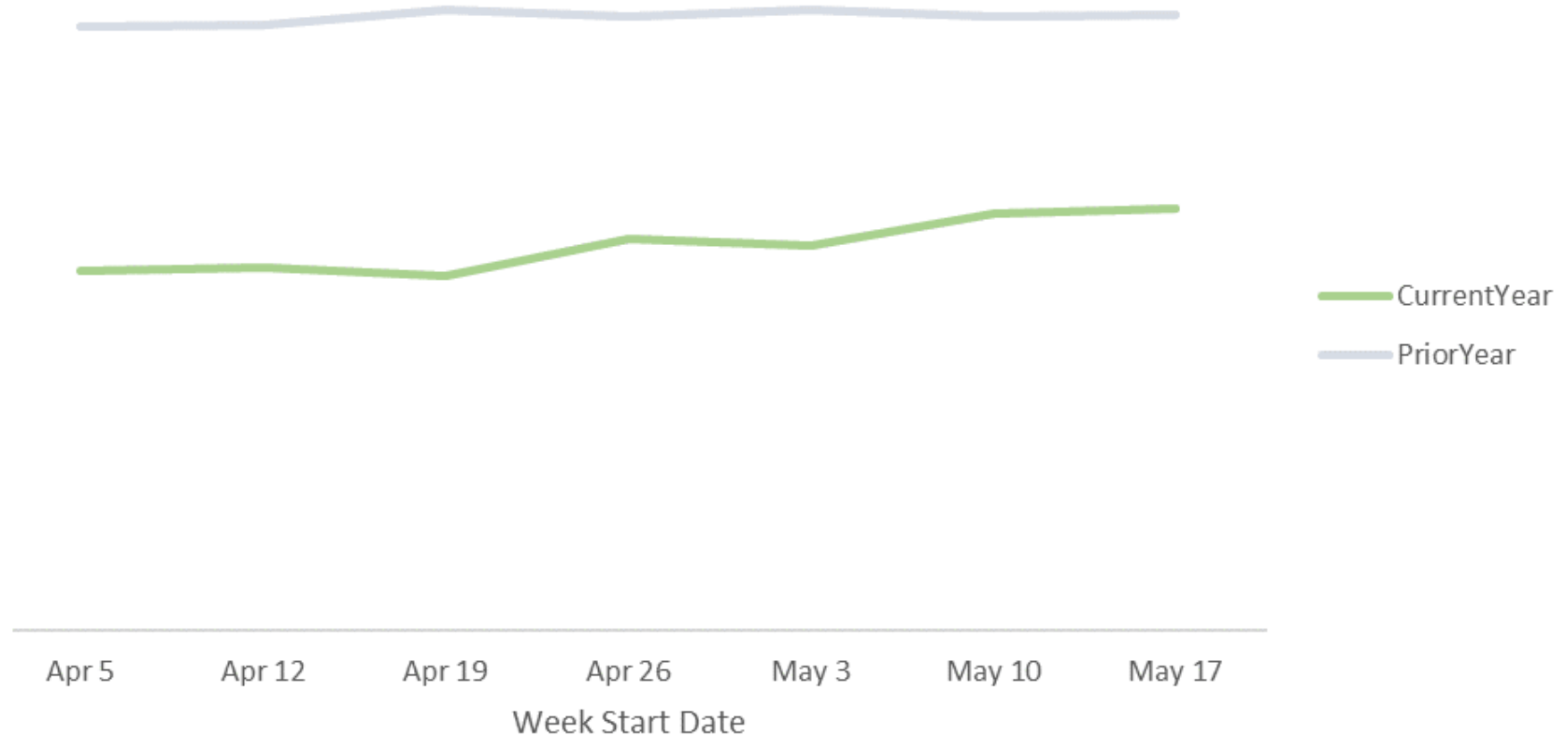
Advertisers are identifying the value of less populated destinations

'accommodations' queries + destinations with smaller populations



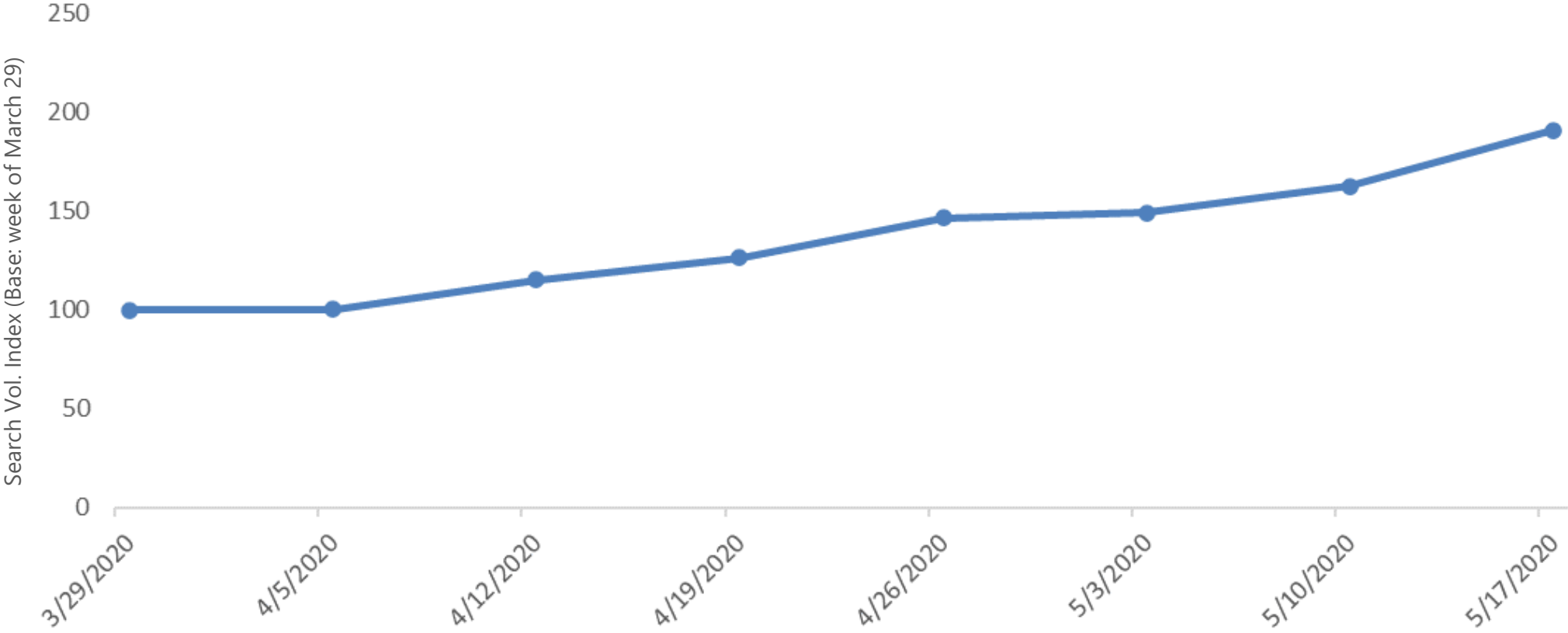
Searches for more populated destinations are triggering fewer ads

'accommodations' queries + destinations with large populations



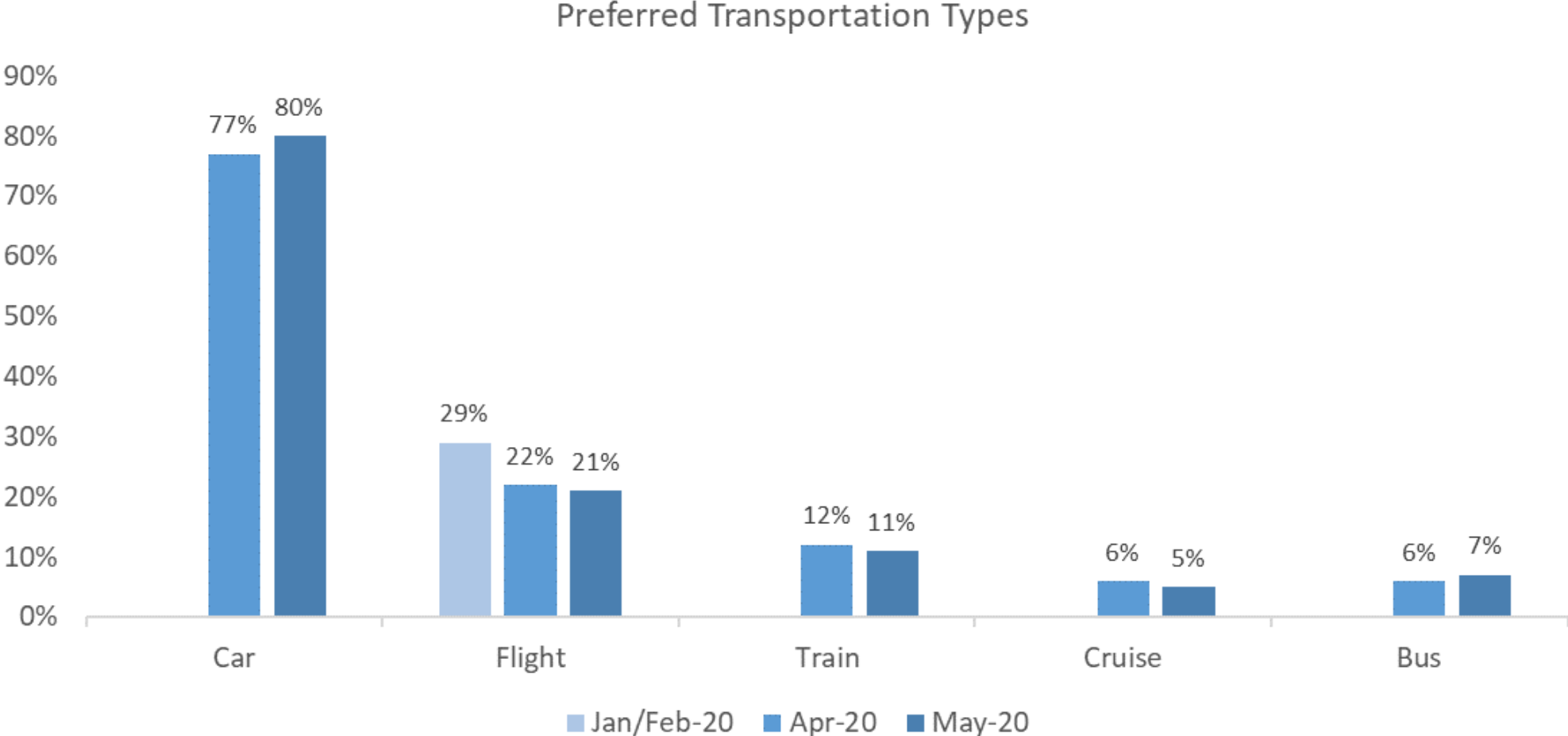
Searches for 'nearby lodging' on the rise

Accommodations Queries Containing "Near Me"



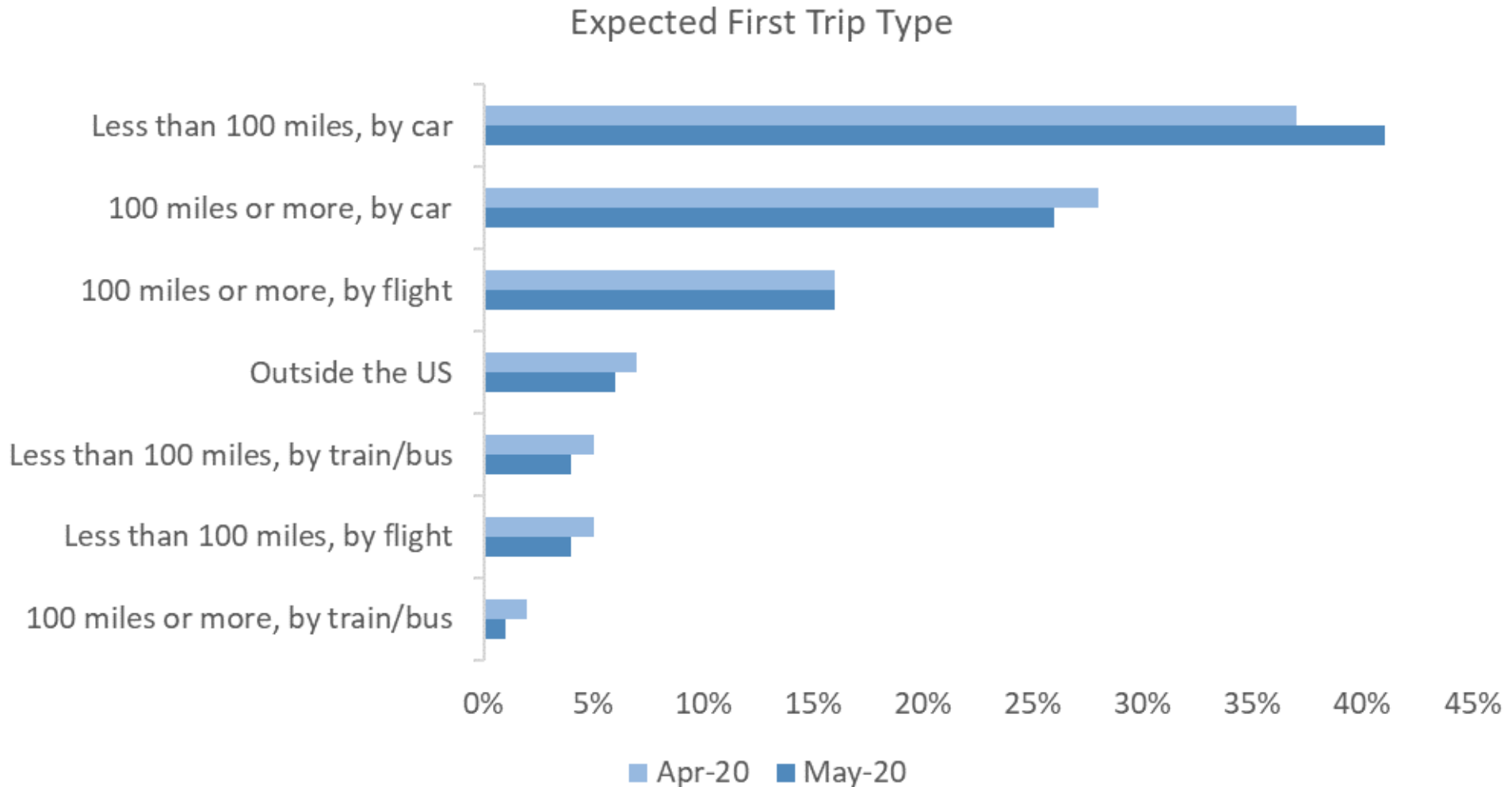
Source: Microsoft Advertising Internal Data; Bing O&O, PC, US

Car is the preferred mode of transportation right now



Source: Skift Research sentiment survey, N=~1000

A domestic trip by car presumed to be the next travel experience



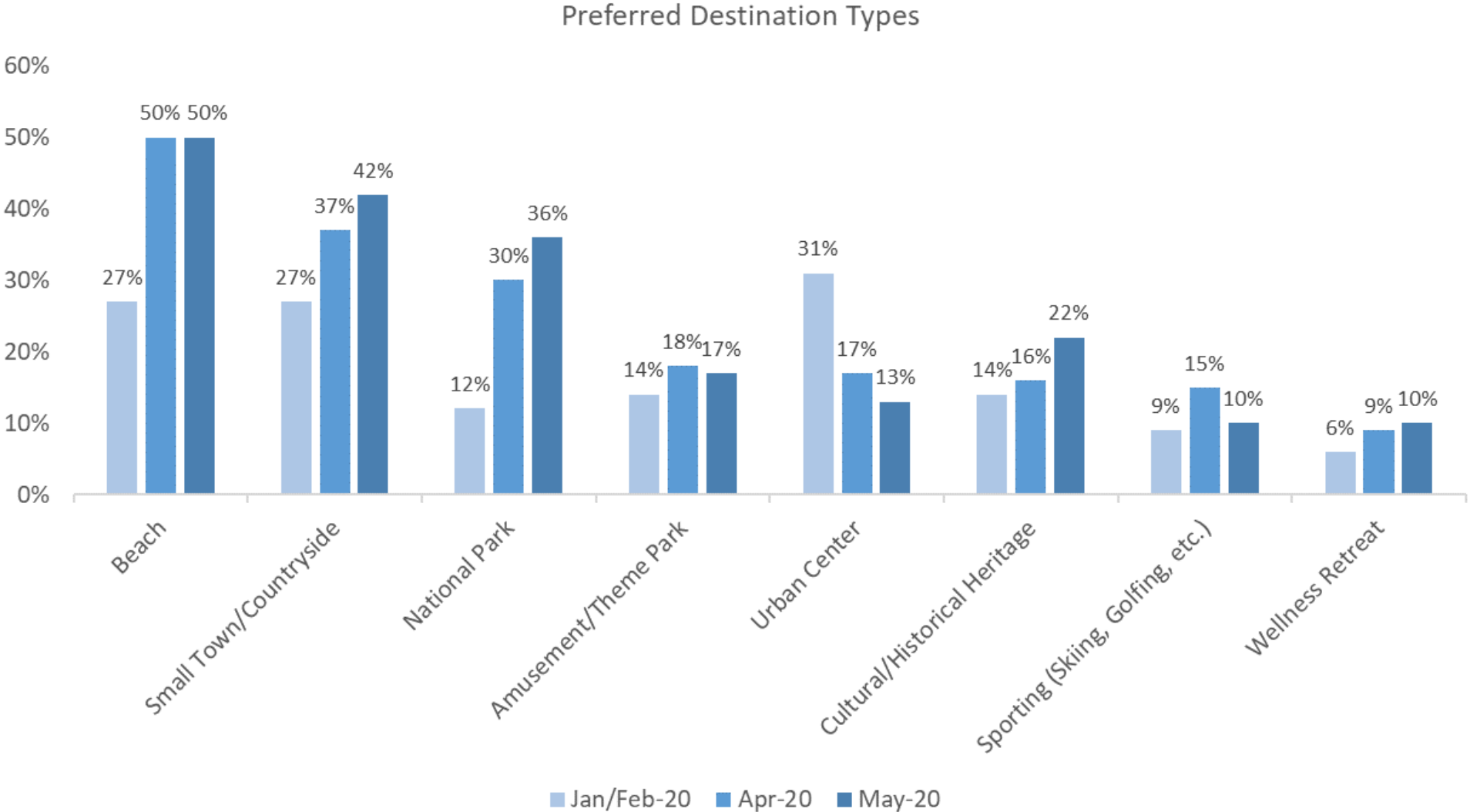
Strategies and recommendations

Learn immediate and recovery-phase strategies, and how to approach new opportunities and optimize account health in the [Digital Advertiser's Guide to COVID-19](#)



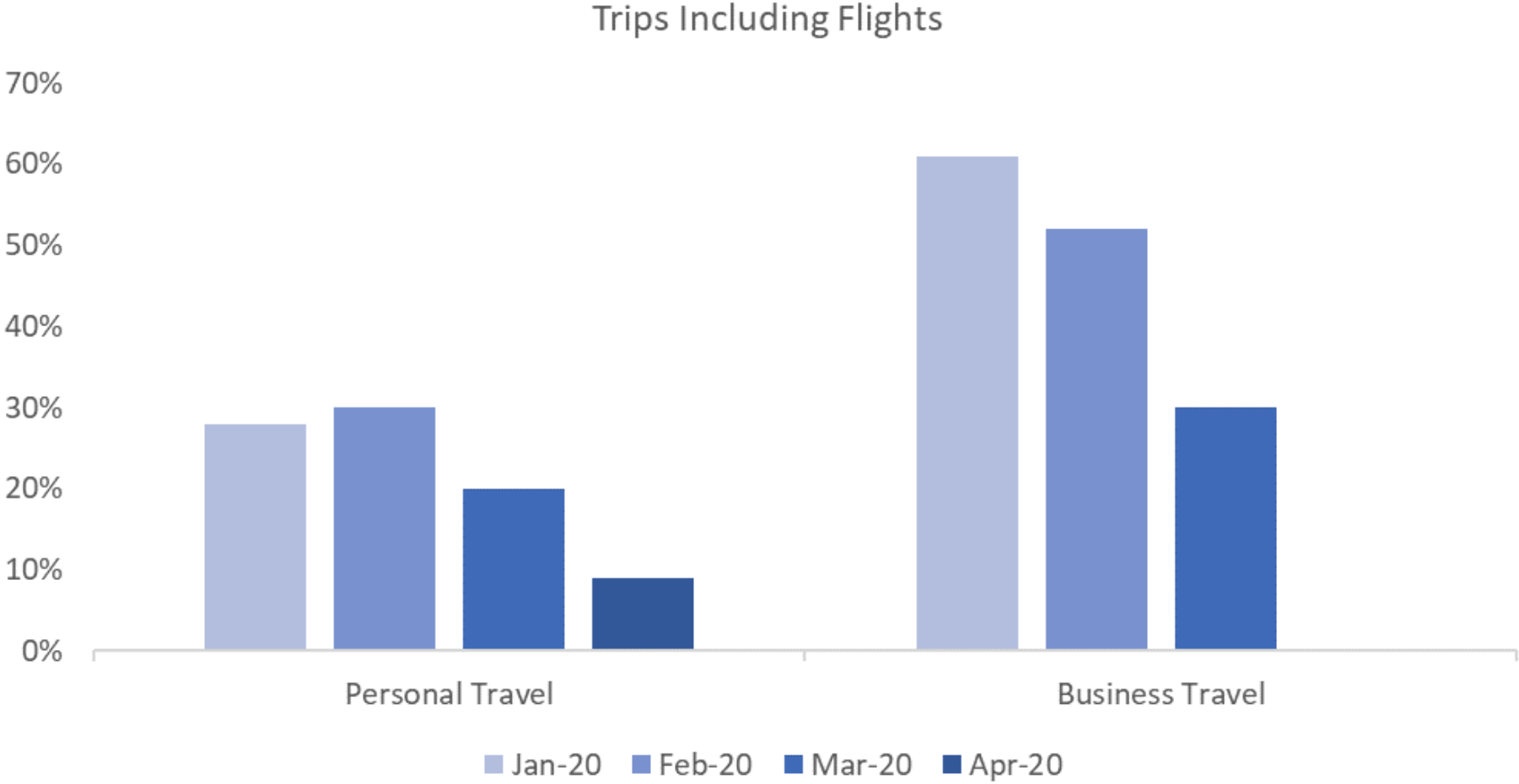
Appendix

Destination trends



Source: Skift Research sentiment survey, May 2020 N=~1000

Personal trips involving flights reached single digits



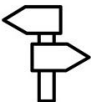
Source: Skift Research sentiment survey, May 2020 N=~1000

Related third-party surveys corroborate localized travel expectations

Americans Who Will Take a Vacation/Weekend Getaway for their Next Trip



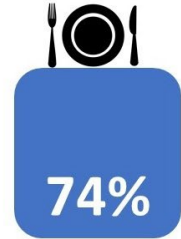
40% Will Visit a Beach Destination



44% Will Visit a Park on their Trip



Will Stay in a Hotel



Will Go to Restaurants



Will Research How Their Destination is Managing the Covid-19 Situation

Source: Destination Analysts, Independent Weekly Survey May 15-17, 2020; N=1200, US Travelers