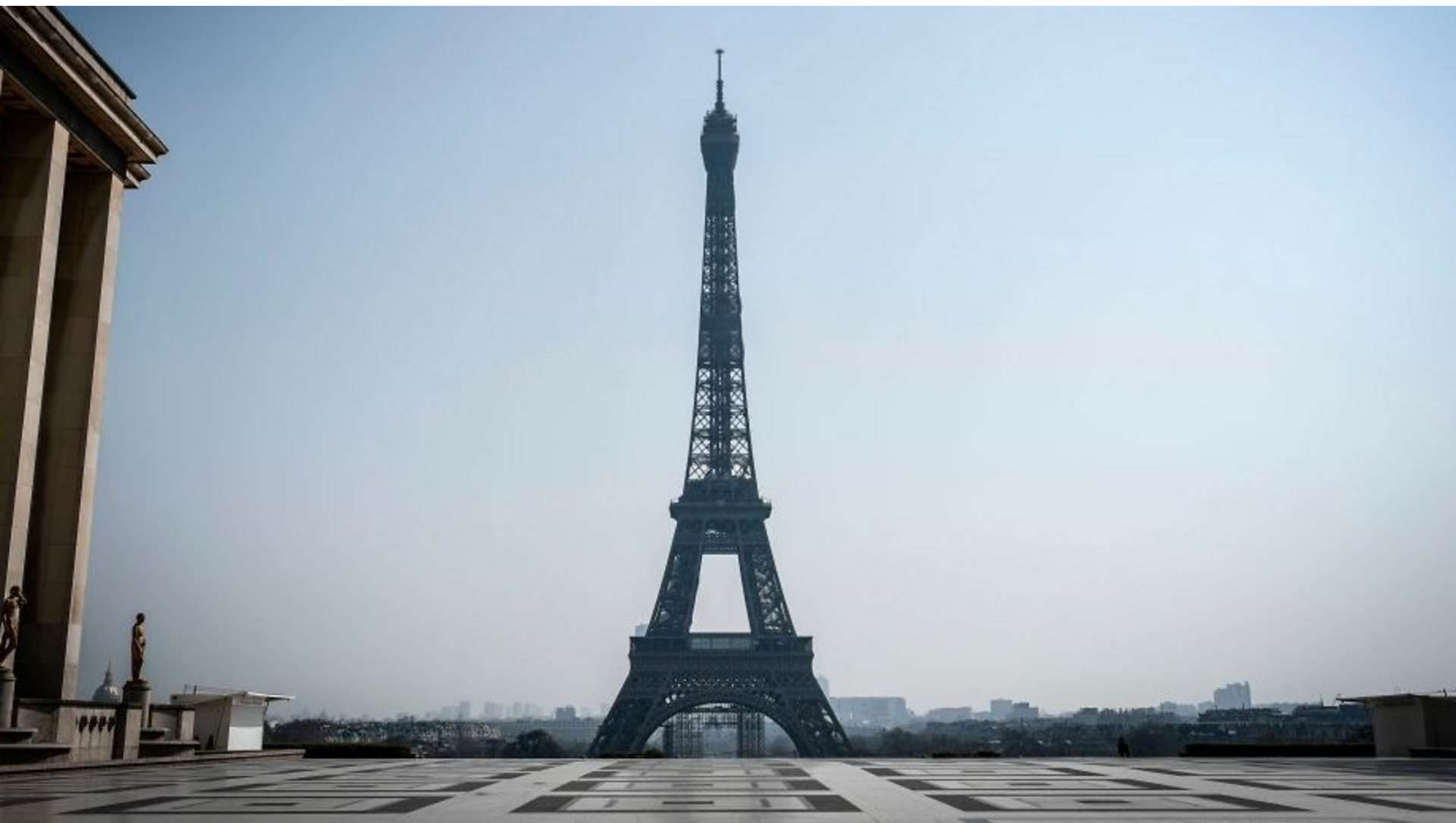


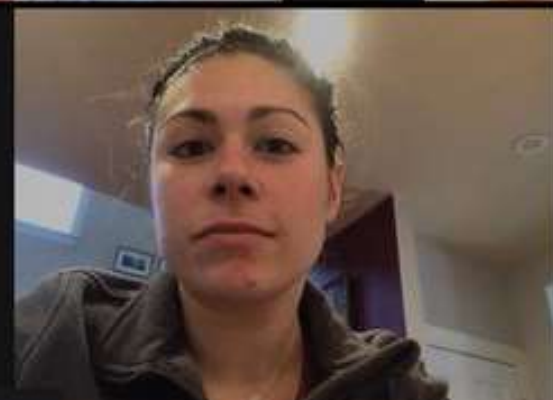
Preparing For The Changing Traveller; This Year & Beyond



Henry Harteveldt
President,
Atmosphere Research Group









DOLLY PARTON/INSTAGRAM

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Hotel Closed

Hotel Closed

HO

CLO

It is mandatory
covering while
support public health,
distancing and masks
Thank you

AUTO



Atmosphere Research Group

Preparing For The Changing
Traveller; This Year & Beyond

WORLDLINE 

26 May 2022

Henry H. Harteveldt

President, Atmosphere Research Group

 @hharteveldt

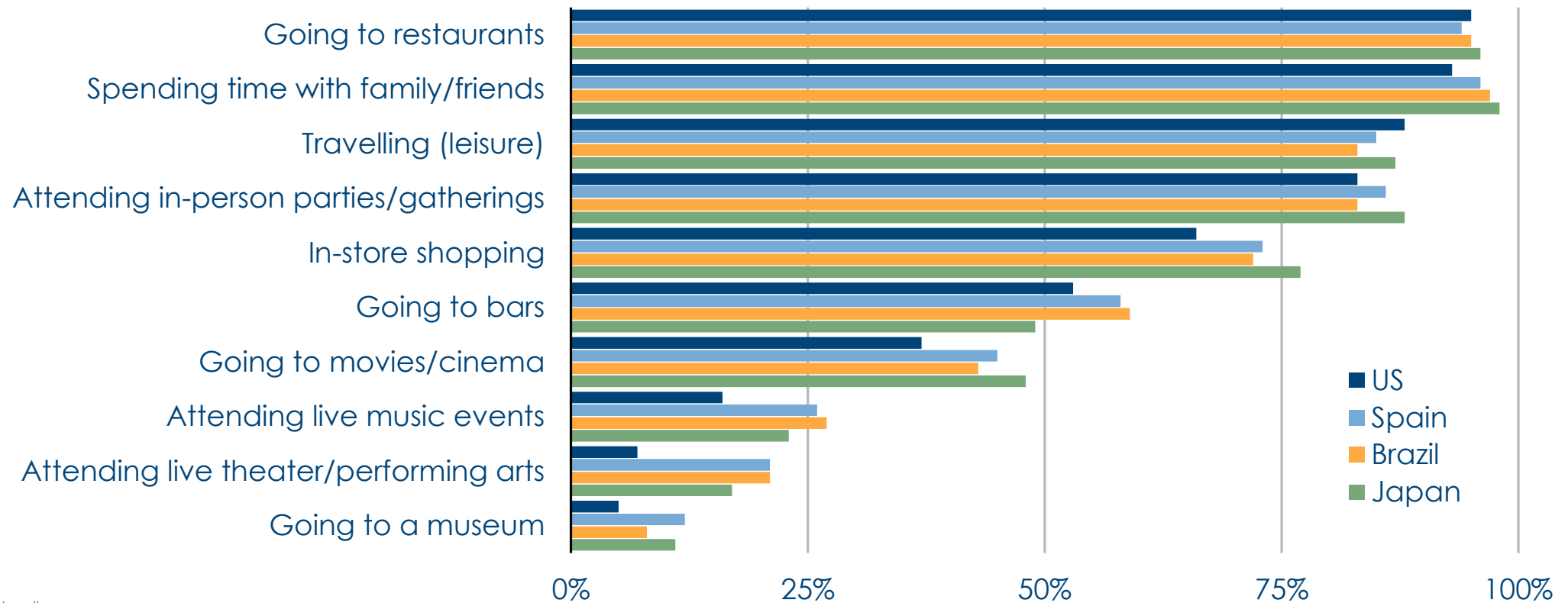
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About Atmosphere Research

- Independent, objective, and unbiased travel industry marketing research firm founded in September, 2011
- Focus on the intersection of travellers, commercial topics, and related technologies
- We survey travellers in 12 countries and conduct research studies among industry professionals worldwide

Travellers Are Eager To Resume Travelling

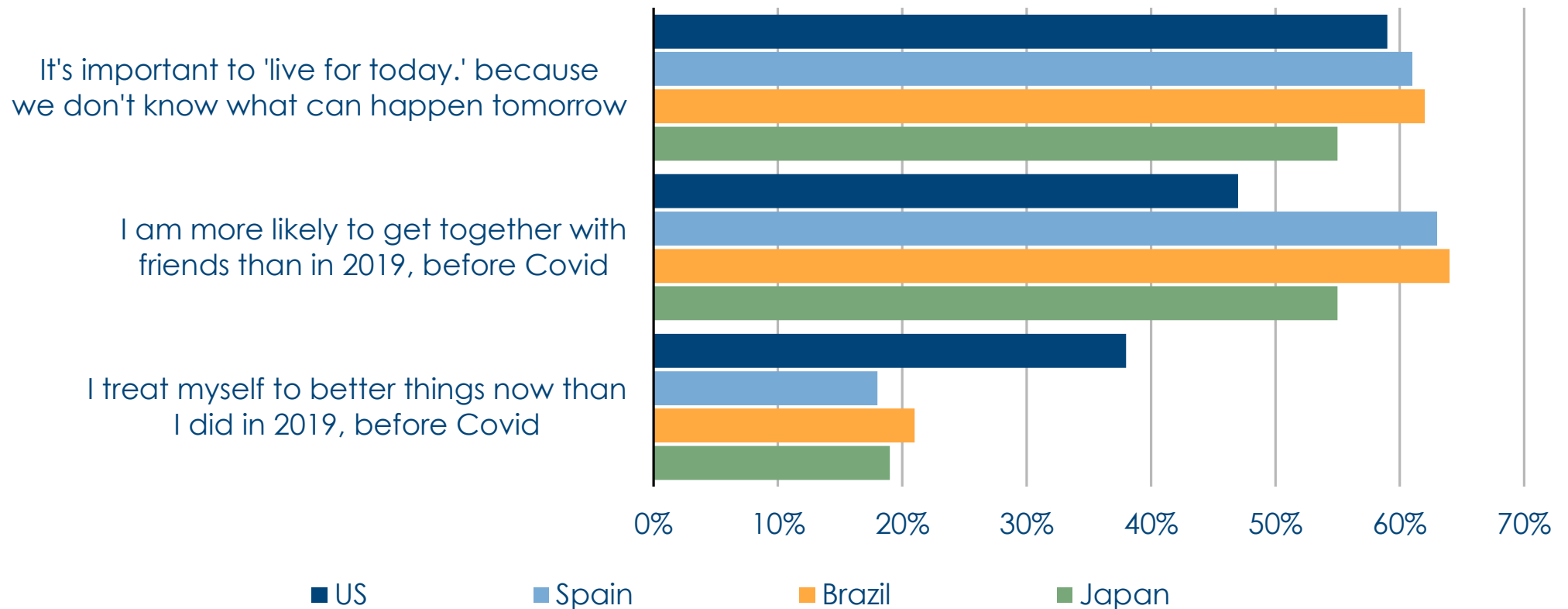
“What activities are you most looking forward to doing once you consider Covid to be “under control” in your country and Covid-related restrictions have ended?”



Base: Adult travellers
Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022
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Travellers Intent On Enjoying Their Lives – And Travel Can Contribute To This

“To what extent do you agree or disagree with the following statements?” (Top two boxes)

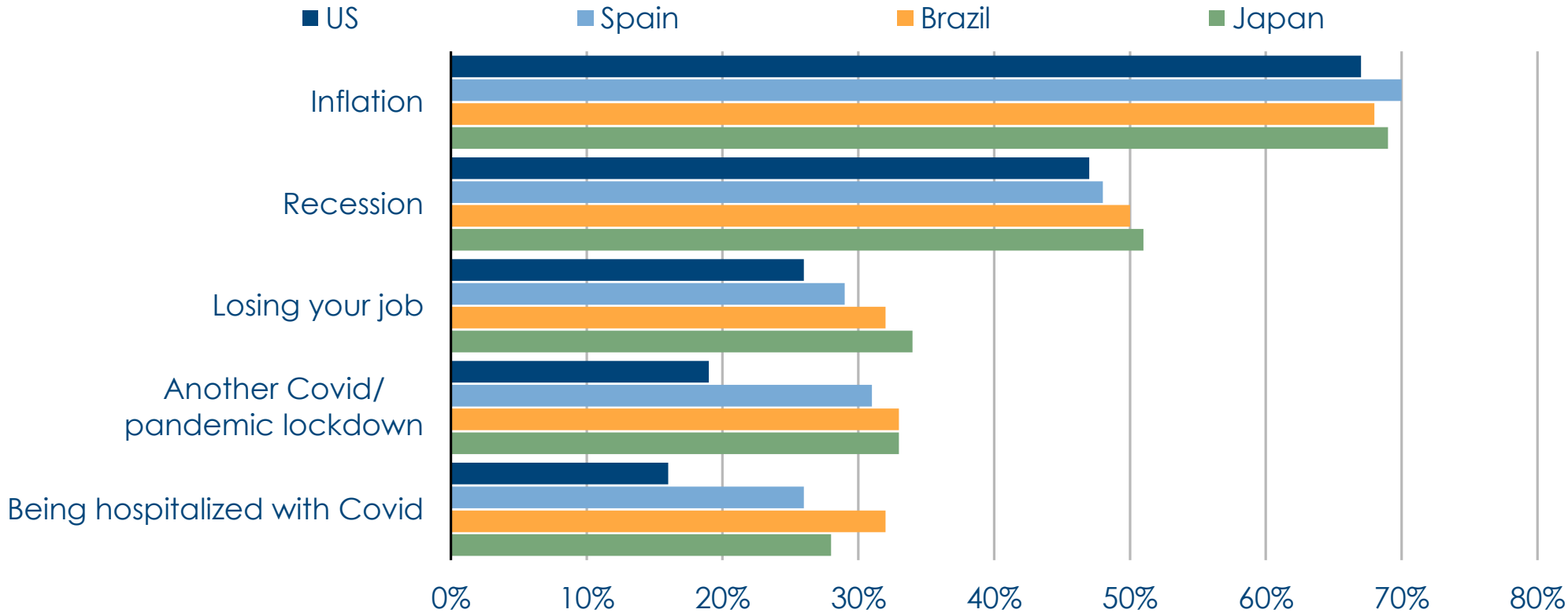


Base: Adult travellers

Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022

Travellers Are Concerned About The Next 18 Months

“To what extent do any of the following occurring between now and year-end 2023 concern you?”
(Somewhat/very concerned)



Base: Adult travellers
Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022

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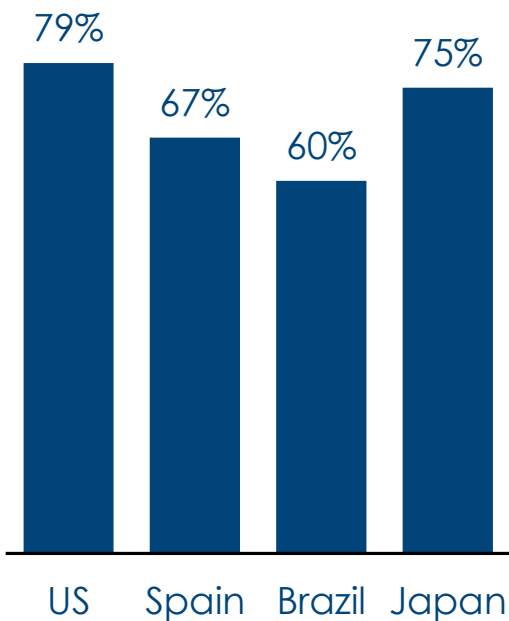
1 In 5 Travellers In US, Spain, Brazil & Japan Lost Their Jobs Due To Covid

LOST MY
JOB

DUE COVID-19

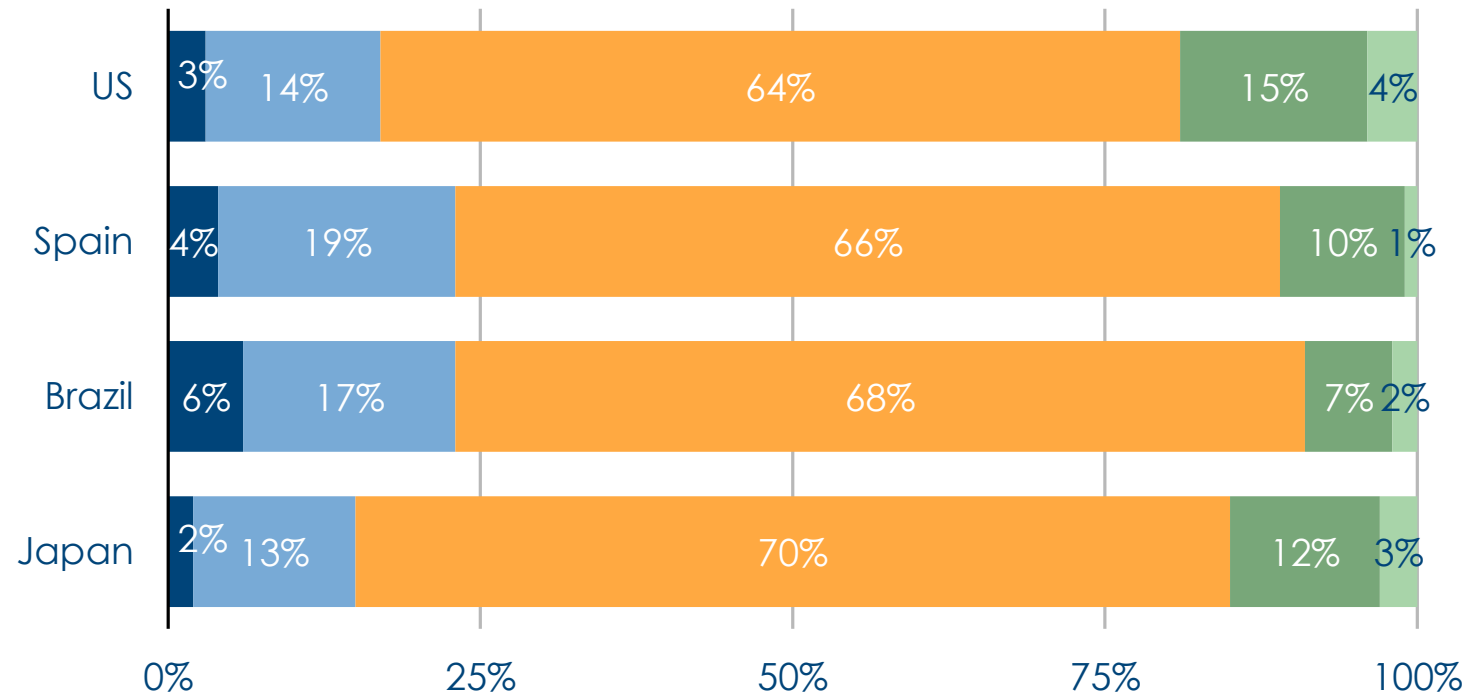
Most Travellers Who Lost Jobs During Covid Are Working Again, And Are Earning About The Same

% who found a new job after losing theirs during 2020-2021



“How does your household income compare now to what you earned in 2019?”

■ Much less ■ Somewhat less ■ About the same ■ Somewhat more ■ Much more



Base: Adult travellers

Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022

Travellers Expect To Be Careful About Spending Discretionary Income...

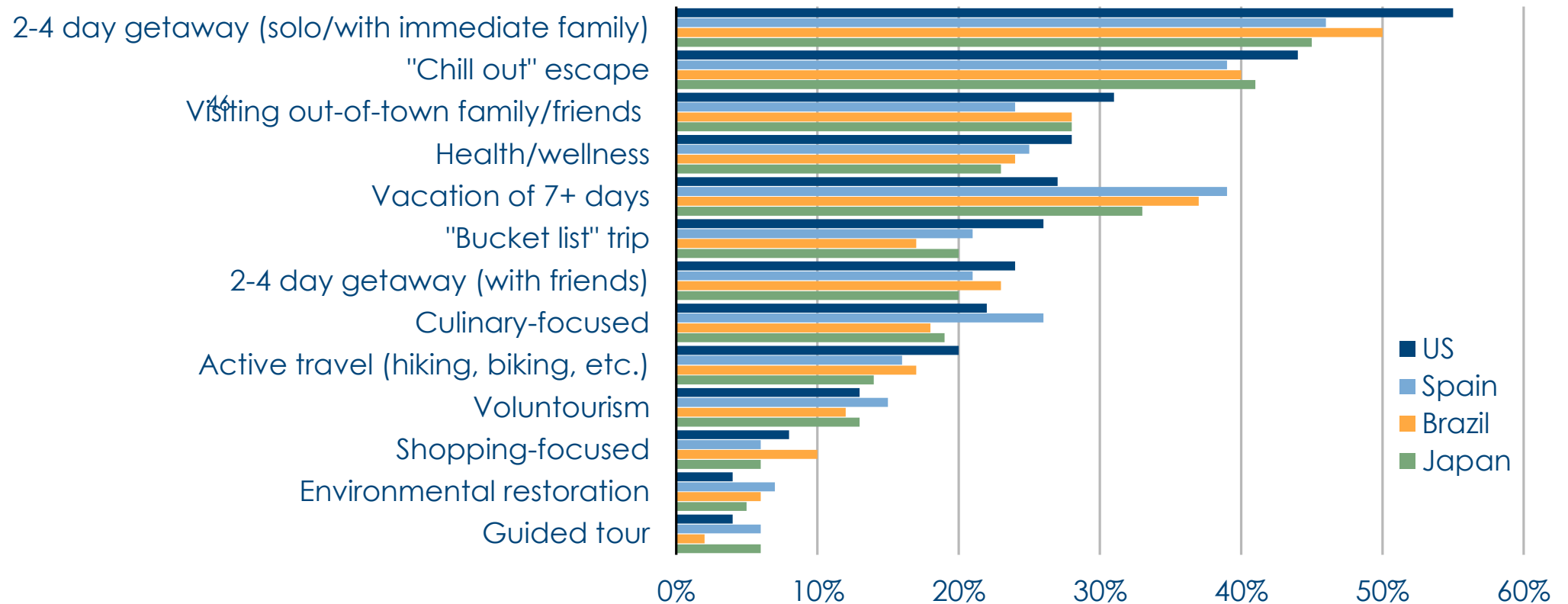


...But Will Prioritize Spending On Travel



Travellers Show Most Interest In Trips That Focus On Family/Friends, Indulgence, And Recuperation

“What types of personal/leisure trips are you considering taking in 2022?”



Base: Adult leisure travellers

Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022

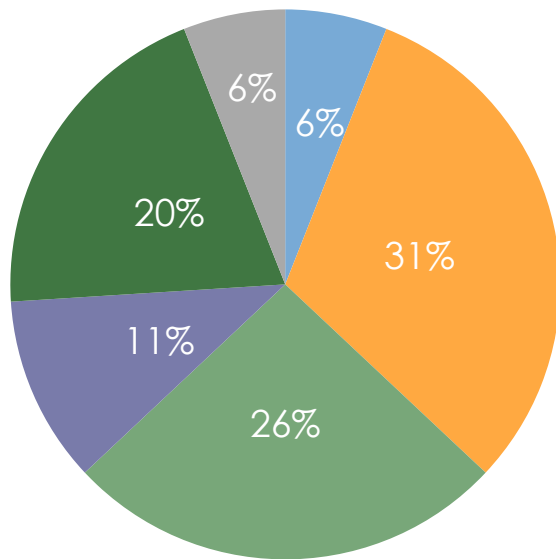


Sustainability Extremely Important To Travellers

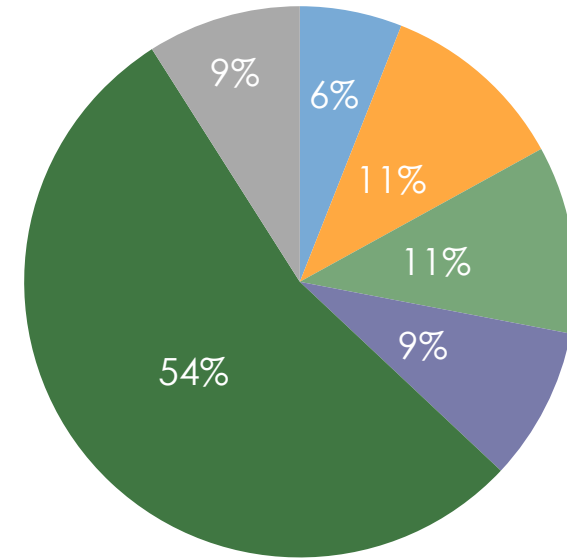
Spanish 22-34s 50% more likely than 35-49s to buy travel based on provider's sustainability activities

Big Change Coming To Business Travel

“When do you expect your organization's total business travel volume to return to 2019/pre-Covid levels?”



“When do you expect your per-employee business travel to return to 2019/pre-Covid levels?”



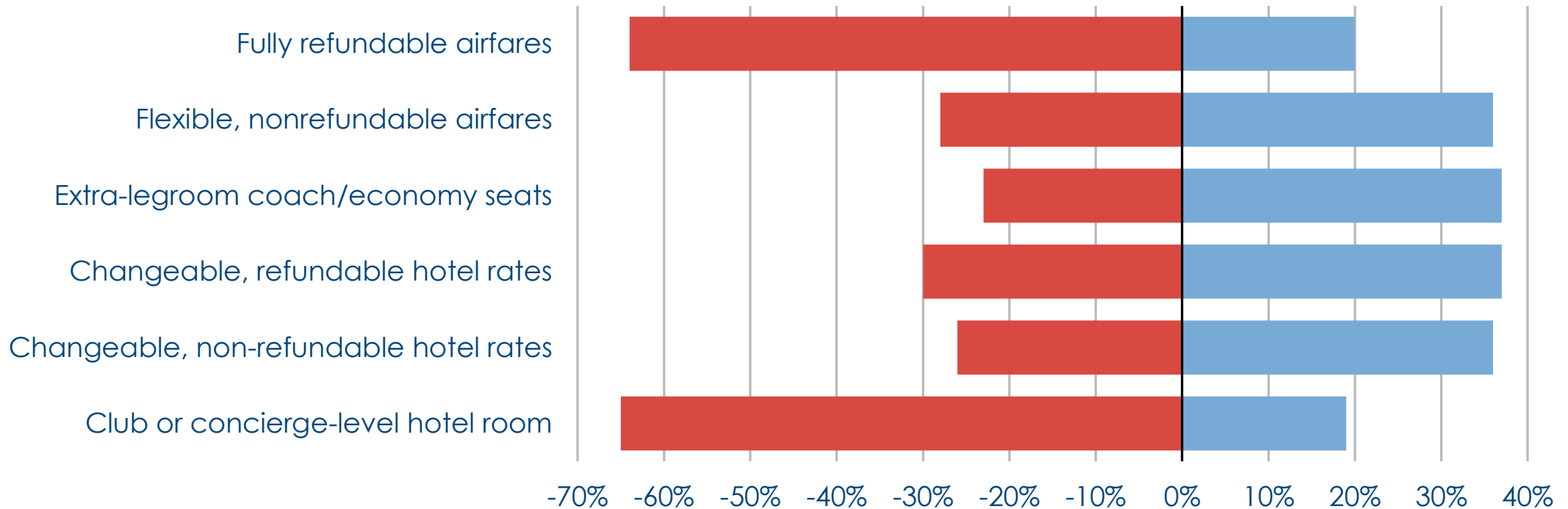
■ Already returned
■ By year-end (YE) 2022
■ YE 2023
■ YE 2024
■ YE 2025 or later
■ Never
■ Don't know

Base: US and European-Based Corporate Travel Managers
 Source: Atmosphere Research's Corporate Travel Management Study, Q1, 2022

Critical Mass Of Travellers Open To “Premium” Rates/Fares, Products

“How likely are you to buy the following types of travel rates/fares or products for your personal/leisure travel in 2022?”

■ Somewhat/very unlikely ■ Somewhat/very likely



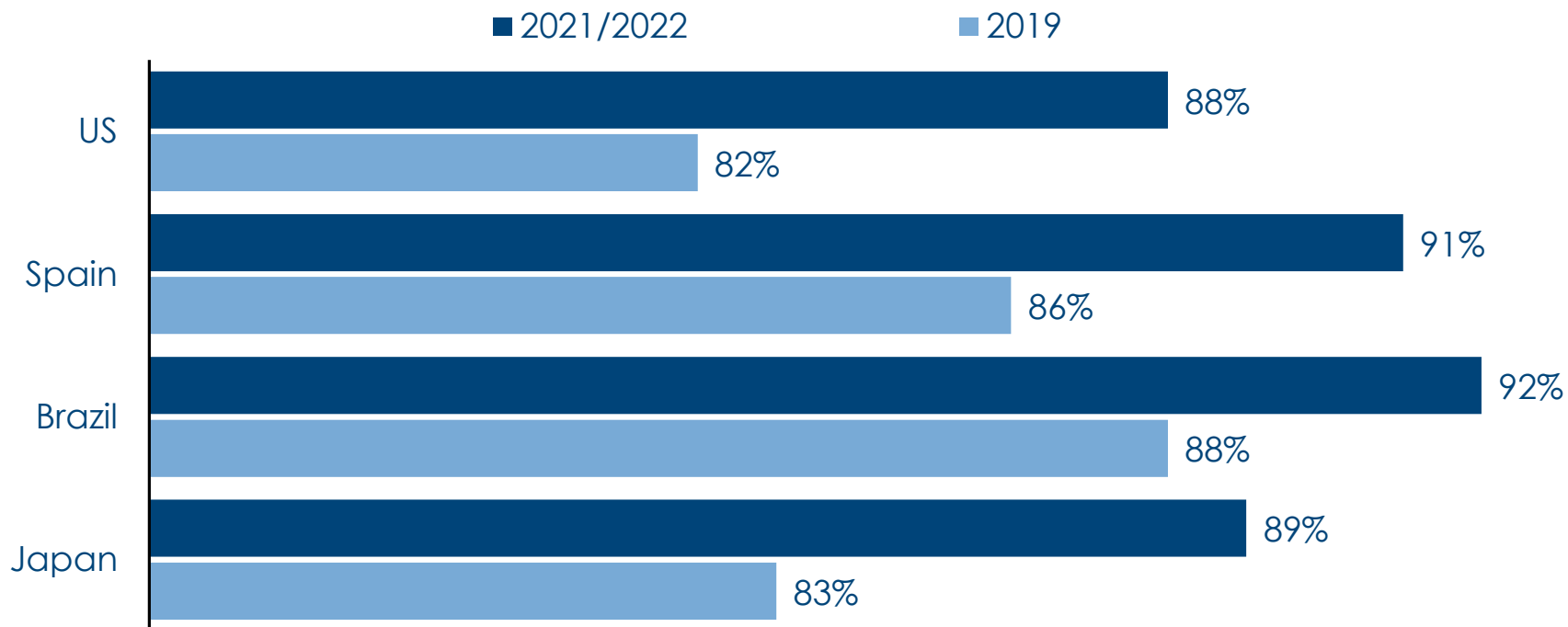
Base: Spanish adult leisure travellers
Sources: Atmosphere Research's Spain Travel Online Study, Q1 2022

Work From Anywhere Creates New “Digital Jet Set”



Travellers More Likely To Set Budgets For Personal /Leisure Travel Now Than In 2019

“When planning a leisure/personal trip, how likely are to set a budget covering transportation, lodging, meals, sightseeing, and entertainment?”



Base: Adult leisure travellers

Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022; US Travel Online Study, Q1 2019; Spain Travel Online Study, Q2, 2019; Brazil Travel Online Study, Q3 2019; Japan Travel Online Study, Q4 2019

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But, Travellers Will Spend - And Are Willing To Spend - With The Right Motivations

Baseline budget







“Second wallet”



Critical Mass Of Travellers Interested In Travel Subscription Products

% of travellers somewhat/very interested in annual subscriptions for the following travel services



				
US	35%	31%	27%	18%
Spain	32%	28%	21%	15%
Brazil	38%	24%	23%	16%
Japan	13%	16%	28%	22%

Base: Adult leisure travellers

Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022



Travellers Are More Likely To Expect Everything Personalized. Every Time. All The Time.



Mobile Is The Gateway To Traveller Engagement —
Especially “Impulse”/Opportunistic Sales.





ID 20190609/007.1215.6

like/followers/subscriptions

Contactless Technologies Allow Travellers' To
Have Fast, Safe, Frictionless Interactions

Travellers Are Less Loyal, More Mercenary





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Message

Follow



4,341 posts

1.9M followers

2,468 following

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IL•Lincoln



NY•Hoosi...



MI•Muske...



MO•Donip...



MO•St. Lo...



OH•Dayton



OH•Young...

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Social Commerce Expected To Grow From \$492B in 2022 To \$1.2T By 2025



AR, VR Are Very Real

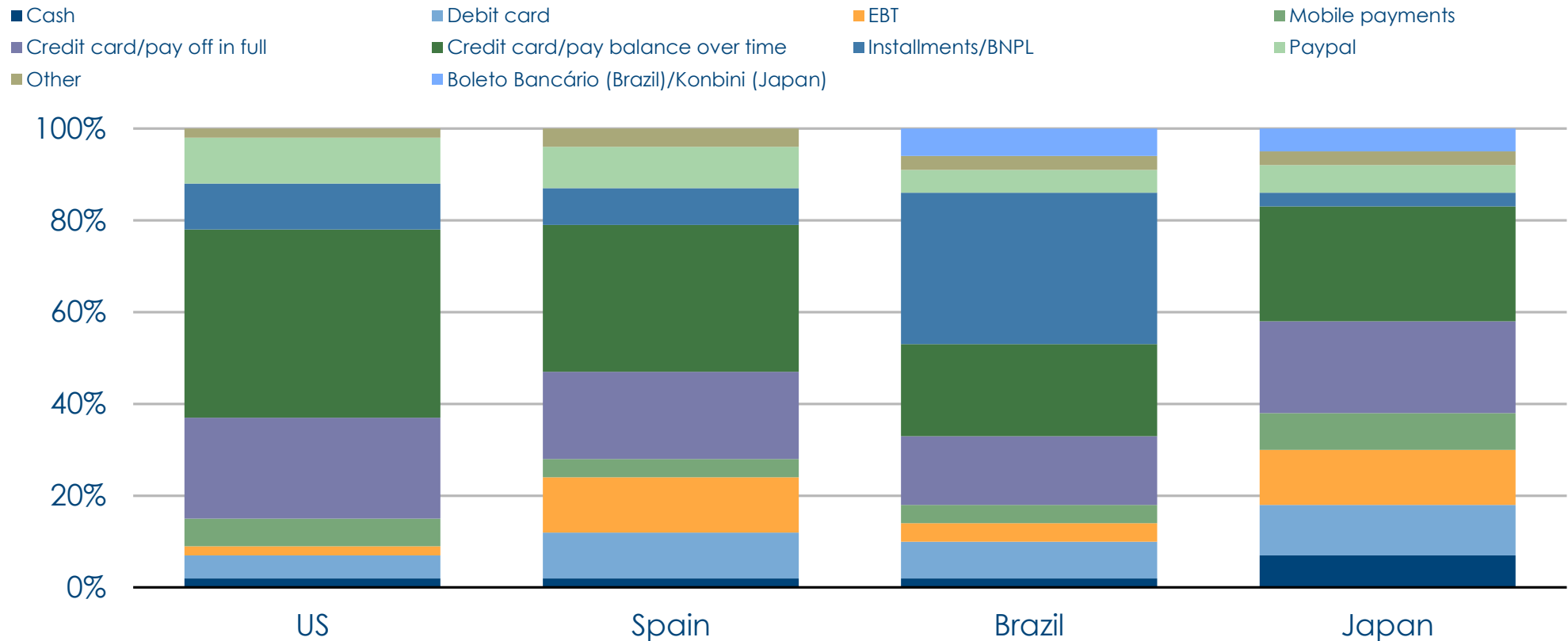
A vibrant, futuristic cityscape at night, likely representing a metaverse environment. The scene is filled with neon lights in shades of purple, blue, and pink. In the foreground, a person wearing a VR headset is looking towards the right. The background shows a dense urban environment with tall buildings, billboards, and a large, illuminated diamond-shaped logo at the top center. A semi-transparent purple text box is overlaid on the scene, containing the text "The Metaverse Will Become Part Of Your Future".

The Metaverse Will Become Part Of Your Future



Travellers Have Diverse Payment Preferences

“How would you prefer to pay for the personal/leisure travel you plan to take in 2022 and 2023?”

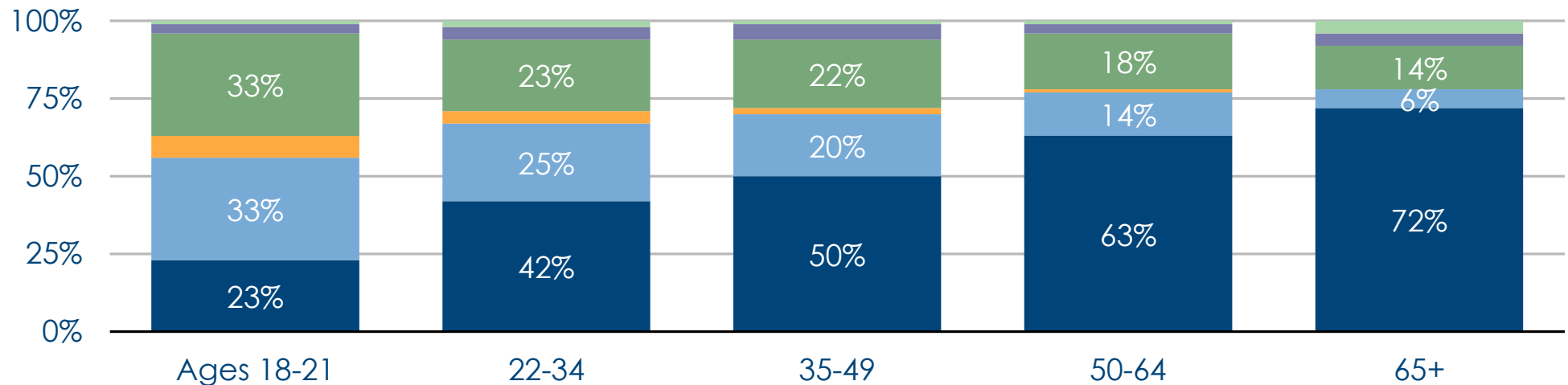


Base: Adult leisure travellers
Sources: Atmosphere Research's US, Spain, Brazil, and Japan Travel Online Studies, Q1 2022

The Younger The Traveller, The More Likely She/He Is To Want More Payment Options

“What is your opinion of the various payment options available to you to pay for your personal/leisure travel?”

- No opinion
- I don't know
- I would prefer more flexible payment options (e.g., Buy Now, Pay Later)
- I would like to pay with crypto
- I would like more digitally-based payment options (excluding crypto)
- I'm satisfied with the payment options available to me



Base: Spanish adult leisure travellers
Sources: Atmosphere Research's Spain Travel Online Study, Q1 2022

Wrapping Up

- We've been through a lot — but we're still here
- No such thing as “same as it ever was.”
- Travellers want to travel, but external factors (inflation, etc.) may affect demand and travellers' abilities/willingness to pay
- Many new methods exist to connect with travellers and offer them their desired travel services, experiences
- Travellers seek increasing diversity in payment options

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Thank You!

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henry@atmosphereresearch.com

Rise

2022



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