

# #Travel & Tourism

---



# AIRSAGE

Insights for a moving world



---

## PENT-UP DEMAND FOR SUMMER 2021

# PENT-UP DEMAND FOR SUMMER 2021

## INDUSTRY OUTLOOK

Post-pandemic, opportunities are emerging everywhere. We analyzed 28 months of AirSage data at Universal Studios in Orlando, FL, and its surrounding area to compare the present and past travel patterns.

The results are exciting! We identified positive changes and new trends in travel search, destination choices, and bookings. These insights provide an excellent foundation for new business and marketing strategies to attract more travelers.

If you'd like to know more about what we do, we regularly share our thoughts on industry trends, application development, company accomplishments, and more on our [blog](#).

COPYRIGHT © 2021, AIRSAGE INC.

Written and Designed by:  
Anna Pak & Eleni Murru

THANKS FOR READING!

Have questions?  
Drop us a note at [sales@airsage.com](mailto:sales@airsage.com) or visit us online at  
[www.airsage.com](http://www.airsage.com)



*Photo by JillWillington*

# PENT-UP DEMAND FOR SUMMER 2021

A year has passed since the beginning of the COVID-19 pandemic. We have been forced to adapt to an unexpected situation and change our routines in every aspect of our lives: work, social interactions, recreation, the way we shop, how and when we move and travel. During 2020, consumer behavior has changed and some new trends will remain post-pandemic.

What do people think about traveling? How did their daily or weekly movement patterns change? What trends can be highlighted? Since the new normal will undoubtedly continue to include social distancing and other restrictions for quite a while, consumers will be inclined to make different choices in regard to travel.

By analyzing data from a given point of interest, we can observe changes in population movements and provide a comparison between the present and past behavioral patterns.

This study observes the changes in the visitation flow and average time spent at Universal Studios in Orlando, FL and its neighboring area, including hotels, restaurants, and cafes. Despite the observed data fluctuations due to the wavering of infection rates, restrictions, and seasonal break times, we can see some anomalies in visitation that might positively impact the travel and hospitality industry.



# CASE STUDY: UNIVERSAL STUDIOS, FL

Photo by ymgerman

Universal Studios in Florida is a popular theme park and production studio located in Orlando, Florida. The park is part of the larger Universal Orlando Resort. In 2017, the park hosted approximately 10.2 million visitors, ranking as the sixth most attended theme park in the United States and the ninth most attended theme park globally. It features eight theme areas all located around a large lagoon: Production Central, New York, San Francisco, Harry Potter Alley, World Expo, Springfield, Woody Woodpecker's KidZone, and Hollywood.

In each area, there are a variety of shows, attractions, rides, and special events hosted all year round. There are also a wide variety of dining options and merchandise stores.

Using the AirSage location intelligence dashboard, one can track human movements across the United States and gain valuable insights about the number of visits, their average duration, travel patterns, and more on a given Point of Interest (PoI) in a specific time frame.

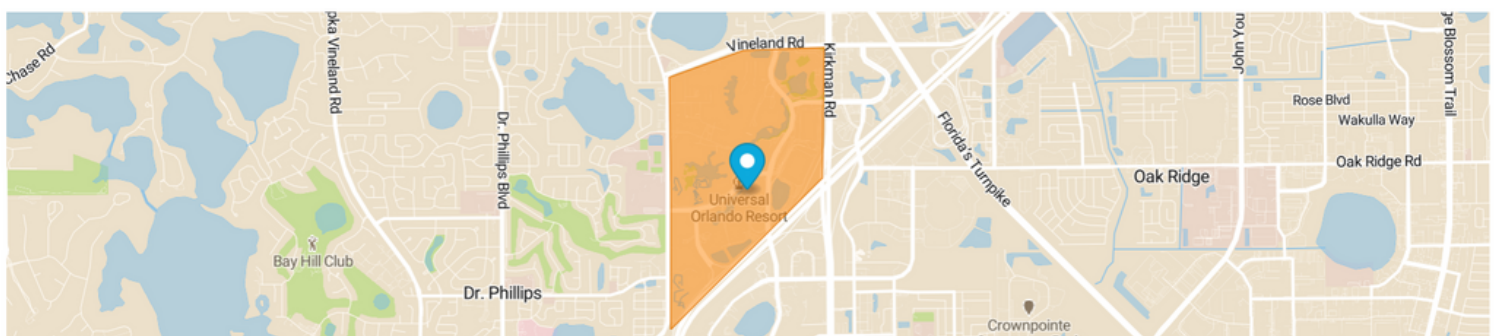
In this study, we compare three time periods (Jan 1, 2019 - April 30, 2021):

- 1) the pre-pandemic period in 2019,
- 2) 2020, the year when the virus began rapidly spreading across the U.S. and
- 3) the visitation flow through January - April of 2021.

## Universal Studios Florida

UNIVERSAL STUDIOS FLORIDA

JAN 01 2019 - APR 30 2021





# VISIT ORIGIN MAP ANALYSIS

Photo by Cody Yim

The Visit Origin Map presents the number of visitors based on their origin (states, counties, or MSAs) over a certain period of time. The different shades of colors, from the darkest to the lightest, indicate the volume of visitors.

Following are the top 10 states from which tourists came to the park and surrounding area throughout the study period:

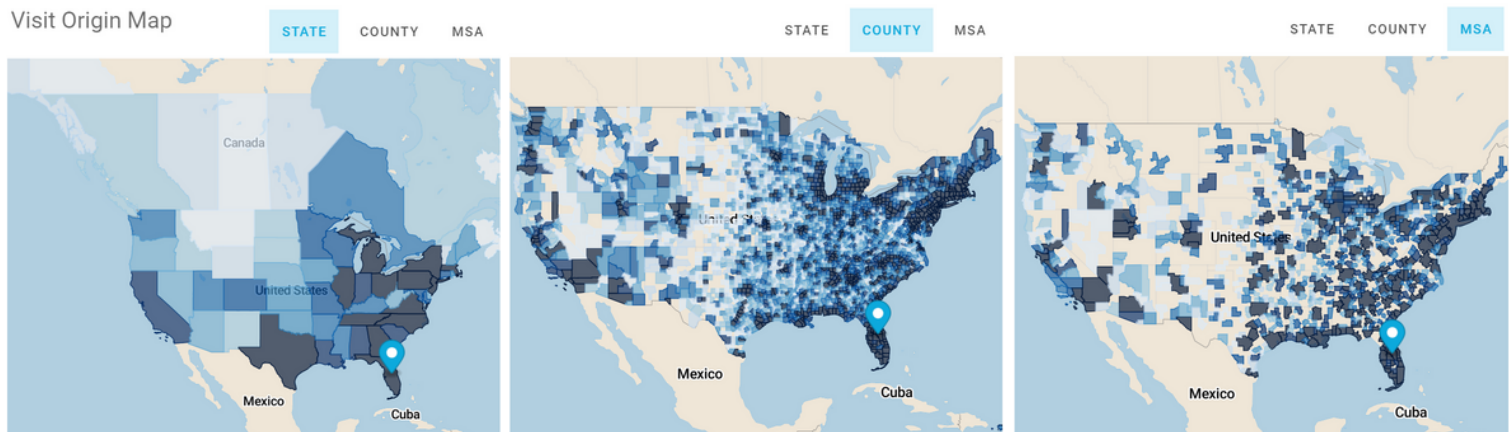
- 1) Florida 142.3 M;
- 2) New York 14.1 M;
- 3) Texas 11.8 M;
- 4) Georgia 11.6 M;
- 5) Pennsylvania 9.7 M;
- 6) Illinois 8.6 M;

- 7) New Jersey 8 M;
- 8) Michigan 7.2 M;
- 9) Ohio 7.1 M;
- 10) North Carolina 7 M.

An interesting highlight is more than 3 million visitors came from Canada in the pre-pandemic period.

Despite the proximity to Florida, lower visitation volume was observed from Louisiana with 4.3M, Mississippi with 2.5 M, Alabama with 4.8 M, and South Carolina with 4.2 M visitors. Looking at the U.S. overall, the fewest number of visitors came from Montana (196.7K), Wyoming (254.1K), and Alaska (247.1K).

Visit Origin Map



AirSage: Visit Origin Map, Universal Studios, Orlando, FL

1) State level; 2) County level; 3) MSA level  
(January 01, 2019 - April 30, 2021)



# VISITATION PATTERN ANALYSIS

Photo by C. Cagnin

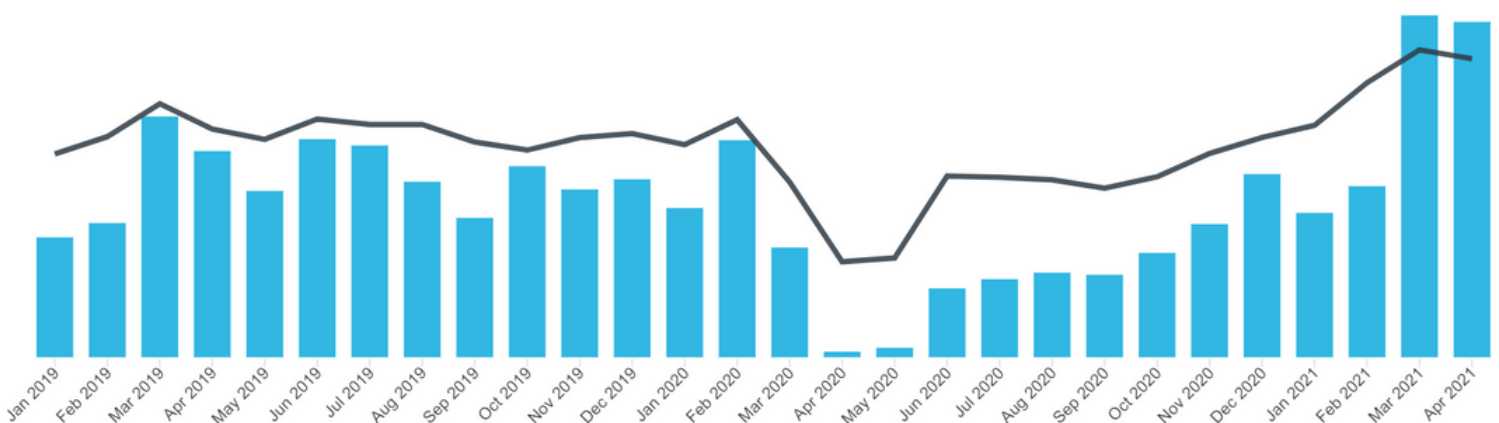
The Visitation Patterns chart shows monthly or daily visitation flow. Surprisingly, despite ongoing restrictions, we can observe that March 2021 indicated the highest visitation volume with 25.1 million visitors and the highest average duration of stay inside the theme park – 10.75 hours. For comparison, in March 2019, the park had 17.6 million visitors with an average stay of 9 hours. While in March 2020, the COVID-19 virus began rapidly spreading across the country, which led to the drop in visitation to only 8 million people – a 54.54% drop compared to the previous year with an average stay of 6.25 hours.

April 2021 continued the trend indicating 24.6 million visitors with an average stay of 10.5 hours. Comparing to 2019, the visitation in April 2021 increased to 63%.

Based on this unexpected data we can conclude that people are eager for leisure and travel as never before.

The record-breaking numbers in March and April 2021 confirm this trend, which can also be partly explained by the rapid pace of the vaccination campaign and the coincidence of spring breaks.

Visitation Pattern



AirSage: Visit Pattern chart, Universal Studios, Orlando, FL  
(January 01, 2019 - April 30, 2021)



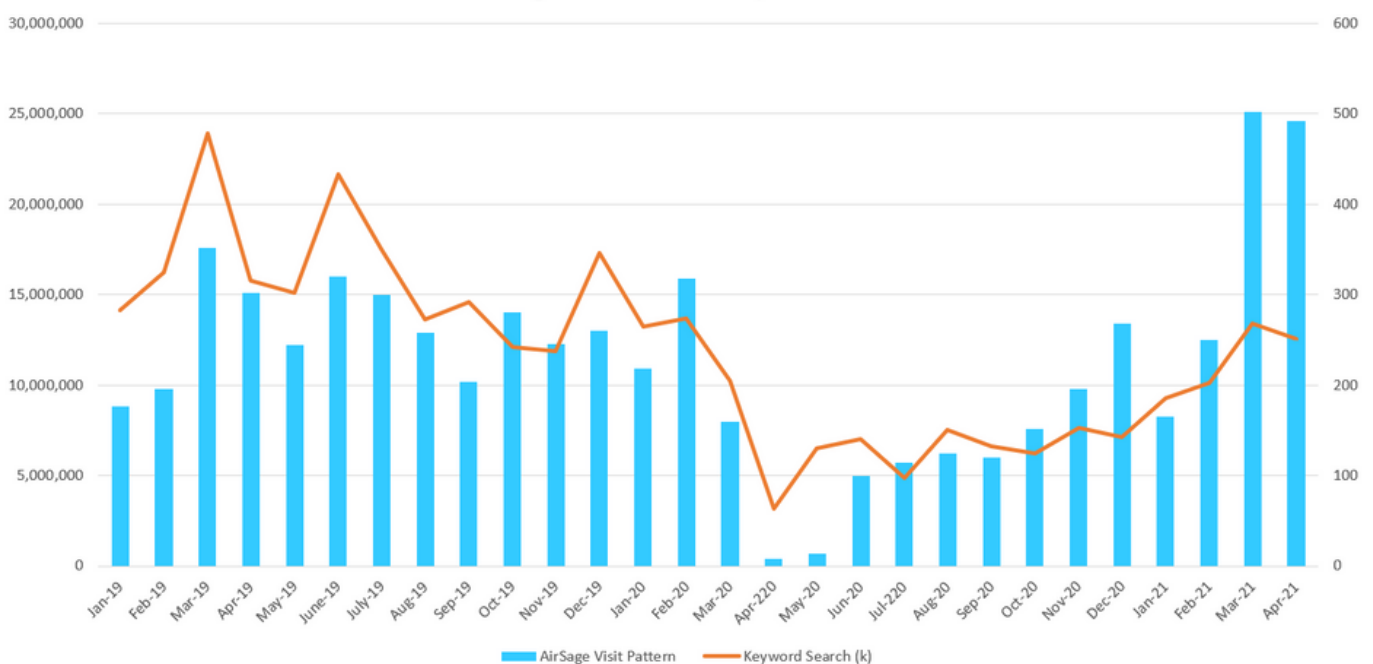
# DREAMING VS. DOING

Photo by Natalia Macheda

The following graph illustrates the comparison of the monthly visitation pattern and the “Universal Studios Florida” keyword search volume on Google. It is interesting to observe that in 2019, during the peak visitation periods correlated to the school holiday season – spring and summer breaks, Halloween, Thanksgiving, and Christmas holidays – more people searched for the keyword than visited the park and surrounding area.

During the first quarter of 2021, we observe the opposite behavior: February 2021 has seen the first increase in visits with a boom in March and April, which saw the highest recorded numbers of visitors for a long time. However, the search volume on Google was minor compared to the actual visits. Considering these insights, one can assume that people have a strong desire to travel and tend to organize trips spontaneously.

AirSage Visit Pattern vs. Keyword search



AirSage Visit Pattern vs. Keyword search  
(January 01, 2019 - April 30, 2021)



# MONTHLY VISITATION AND OUTLOOK INTO 2021

The following table compares AirSage visitation patterns month by month. The main focus is assessing the travel potential in 2021 compared to the pre-pandemic period in 2019.

Based on this data, we built three visitation scenarios for the upcoming months.

MONTH	2019	2021	GROWTH
January	8,800,000	8,250,000	-6%
February	9,800,000	12,500,000	+28%
March	17,600,000	25,100,000	+43%
April	15,100,000	24,600,000	+63%

*AirSage Visit Pattern  
(January - April, 2019 vs. 2021)*

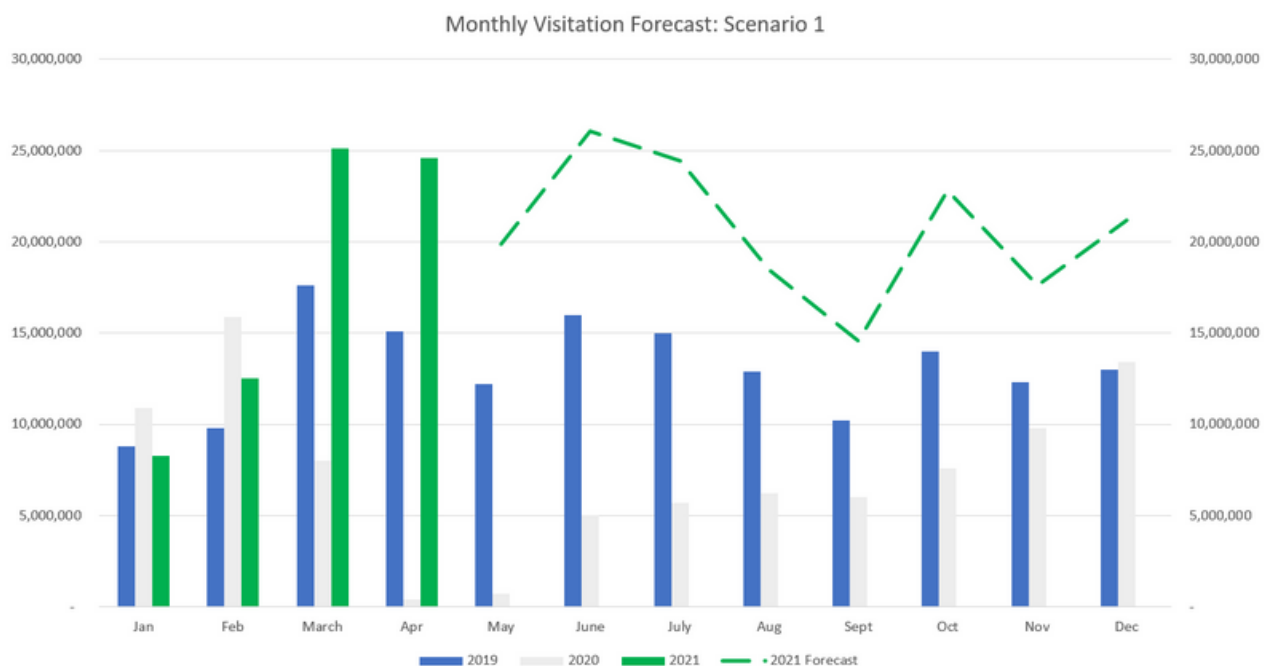
## SCENARIO 1 - SEASONAL GROWTH

Scenario 1 is based on the assumption that the visitation continues to grow in a different path. Let's assume that during the major holidays in June, July, October, and December the visitation growth will continue the April trend (+63%).

For historically less busy months, we apply the growth rate registered in March (+43%). This way, in August and September 2021, the area should register 18.4 M and 14.5 M visits. In November it will be around 17.6 M visitors.

MONTH	2019	2021 (ASSUMPTION)	GROWTH (ASSUMPTION)
May	12,200,000	19,886,000	+63%
June	16,000,000	26,080,000	+63%
July	15,000,000	24,450,000	+63%
August	12,900,000	18,447,000	+43%
September	10,200,000	14,586,000	+43%
October	14,000,000	22,820,000	+63%
November	12,300,000	17,589,000	+43%
December	13,000,000	21,190,000	+63%

2021 Monthly Visitation Forecast, Scenario 1



2021 Monthly Visitation Forecast, Scenario 1



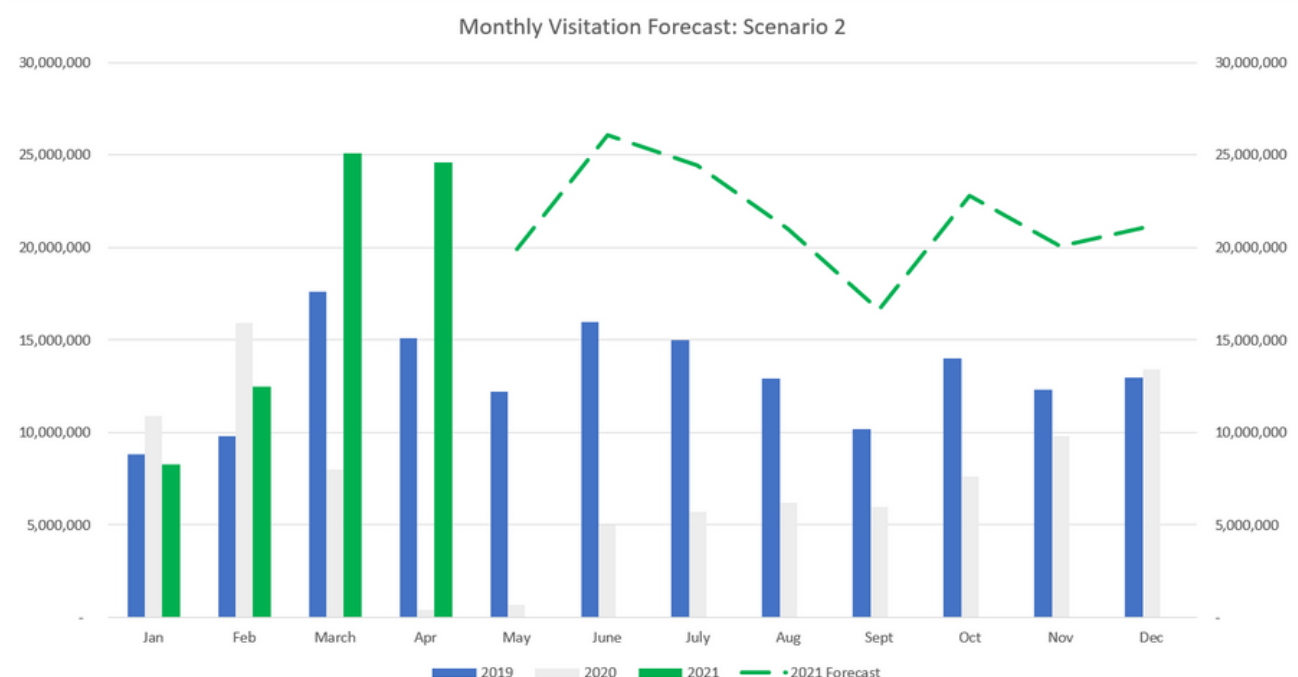
## SCENARIO 2 - MAXIMUM GROWTH

Scenario 2 presents the most positive plot of the travel and entertainment industries. Here we assume that the visitation will continue growing like it was registered in April (+63%).

This way the highest visitation in 2021 will be June reaching 26 M people, following by July with 24.4 M and October with 22.8 M visitors.

MONTH	2019	2021 (ASSUMPTION)	GROWTH (ASSUMPTION)
May	12,200,000	19,886,000	+63%
June	16,000,000	26,080,000	+63%
July	15,000,000	24,450,000	+63%
August	12,900,000	21,027,000	+63%
September	10,200,000	16,626,000	+63%
October	14,000,000	22,820,000	+63%
November	12,300,000	20,049,000	+63%
December	13,000,000	21,190,000	+63%

2021 Monthly Visitation Forecast, Scenario 2



2021 Monthly Visitation Forecast, Scenario 2

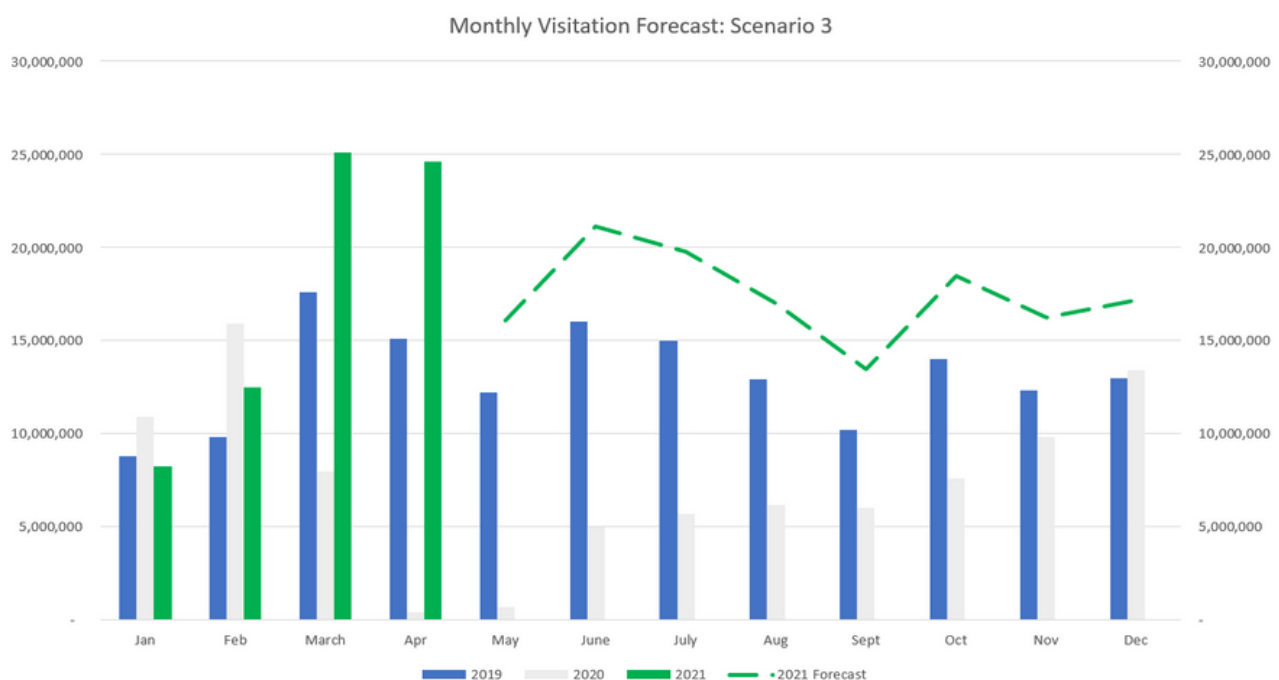
### SCENARIO 3 - AVERAGE GROWTH

Scenario 3 is based on the average visitation growth – 32%. Thus, in the summer peak time, in June and July, the park should expect about 21.1 million and 19.8 million visitors, correspondingly.

During the last quarter of the year, the visitation might reach 18.5 million, 16.2 million, and 17.1 million visitors in October, November, and December, respectively.

MONTH	2019	2021 (ASSUMPTION)	GROWTH (ASSUMPTION)
May	12,200,000	16,104,000	+32%
June	16,000,000	21,120,000	+32%
July	15,000,000	19,800,000	+32%
August	12,900,000	17,028,000	+32%
September	10,200,000	13,464,000	+32%
October	14,000,000	18,480,000	+32%
November	12,300,000	16,236,000	+32%
December	13,000,000	17,160,000	+32%

2021 Monthly Visitation Forecast, Scenario 3



2021 Monthly Visitation Forecast, Scenario 3

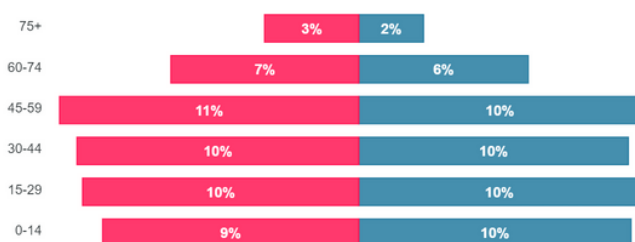


# DEMOGRAPHICS, ETHNICITY & INCOME

Photo by Arvid Knutsen

The bar chart below shows the percentage of visits based on their gender and age group. More visitors are female and the age group is distributed between young and middle-aged. This data is easily explained considering that it is an amusement park with many activities, and a popular destination for families with kids or teenagers.

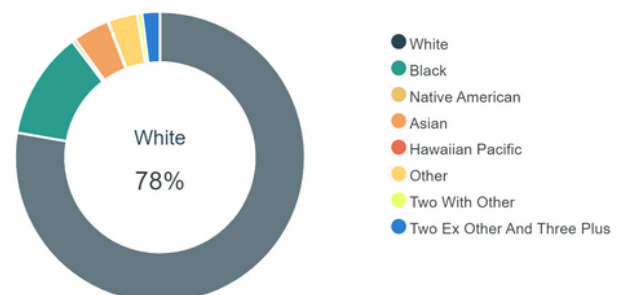
Gender & Age



AirSage: Visitors Demographics, Universal Studios, Orlando, FL  
(January 01, 2019 - April 30, 2021)

The pie chart below illustrates the distribution of ethnic groups visiting Universal Studios Florida. The data analyzed shows that the majority of area visitors are White (78%), followed by 12% Black and 4% Asian.

Ethnicity



AirSage: Visitors Ethnicity, Universal Studios, Orlando, FL  
(January 01, 2019 - April 30, 2021)

The last graph shows the income distribution of Universal Studios visitors.

- 13% of visitors belong to the group with an annual income range of \$75-100K,

- 10% is within a range of \$60-75K,
- 9% have an income between \$100-125K, while
- 8% of visitors are within the \$50-60K range.

Income



*Photo by martin-dm*

# 9 TIPS ON HOW TO WIN MORE TRAVELERS

Today it is vital more than ever before to identify new opportunities for business recovery and growth in the travel and hospitality industries. After more than 14 months of travel restrictions, which forced everyone to change habits and routines, people are increasingly eager for leisure activities and are ready to start traveling again.

May and June are historically the time of the year when people organize and plan their summer vacations. One difference this year - they are choosing flexibility and favoring last-minute plans, short road trips and day trips.

The AirSage insights from March and April 2021 confirm these trends. Our

forecast for the upcoming months is optimistic, and we expect a consistent growth of visits in tourist destinations across the nation.

What does it mean for businesses? Resorts, hotels, spas, restaurants, casinos, parks... no matter what type of business you run, this summer will be a race for returning and new customers. After a long waiting time, people have higher expectations, especially in terms of hygiene and cancelation policies, but are still ready to visit new places or try new things that were for years in their bucket lists.

So how to attract more travelers?



01

### **Provide Peace of Mind**

---

Despite being vaccinated, the risk that a slight cold will ruin the long-awaited vacation is too high. Ensure a safe and peaceful environment for your customers by using contactless technologies and embracing advanced cleaning routines and social distancing.

02

### **Stay Flexible**

---

Many customers will choose their destinations based on the rescheduling and cancellation policy. Adopting a flexible cancellation policy and loyalty program will undoubtedly increase customers trust in your brand.

03

### **Appreciate Spontaneity**

---

As we discovered in our analysis, people tend to make spontaneous trips or bookings. Adopt a discount policy for the unsold inventory to attract this customer group and reduce losses.

04

### **Keep Attention on Locals**

---

2020 made local tourism popular as never before. This still may be the number one choice for those who do not feel comfortable with air travel. Focusing on local travelers might open a door for new revenue streams, in some cases prepaid. For example, introduce monthly or summer subscriptions, give family discounts, or create a partnership with other attractions upselling each other's products.

05

### **Stimulate Travel Desire**

---

This year travelers want everything. Now! When planning a vacation, people will focus on creating the most memorable experience. Therefore, you have a higher chance of winning a client if you also showcase attractions around your property. Exclusive dining, shopping, or parks around your hotel – this is what helps making the booking decision.

06

### **Be Digital**

---

Advertising, SEO, content – everything matters to increase the visibility of your brand. Do not forget, though, the quality of your content matters. Do not flush your budget without a strategy and creative thinking. Analyze your ideal customers to personalize offers and make messaging more relevant.

07

### Embrace Creativity

---

When people choose their next destination, they are dreaming of it. Help them dive into the bliss of rest even before they hit the Book Now button. The latest trends in the travel and hospitality world are Virtual Reality (VR) and Augmented Reality (AR). From VR tour of Presidential suites to AR filters on Instagram to interactive media advertising, the possibilities are endless.

08

### Go Viral

---

The first thing many people do when they hit their vacation destination is share their photos on social media. Use it! Create stunning photo spaces with sophisticated decorations, luxury lounges, or workspaces. Anything out of the box will be on Facebook.

09

### Adopt Location Intelligence

---

Your business and marketing strategy should constantly be challenged and improved. Human movement analysis will certainly help you identify hidden business potential, analyze always-evolving audience and customer behavior, and keep track of changes in the competitive landscape.

Indeed, it is a new situation in the travel and hospitality landscape, and whoever becomes “the loudest” now will set the tone for the year. Be one of the first in your area to set the new standard of high-quality service for your eager customers!

Contact us for any support needed at [marketing@airsage.com](mailto:marketing@airsage.com)

Have a profitable summer!

Yours,

AirSage team







sales@airsage.com  
(404) 809-2499  
2146 Roswell Rd, Suite 108, PMB 862,  
Marietta, GA 30062  
<https://www.airsage.com/>