

INDUSTRY INSIGHTS: SPOTLIGHT ON TRAVEL

July 2021



Consumers are eager to begin traveling again by sea, land, and air as vaccination rates continue to rise. But despite near-normal levels of demand this summer and an optimistic 2022 outlook, the travel industry remains in recovery mode. eMarketer has curated this collection of interviews with travel executives to understand how the industry supported consumers during the pandemic, how they are now welcoming them back, and the factors that will shape the future of travel marketing.

MEET THE LEADERS



Natalie Bowman, managing director of marketing and advertising, **Alaska Airlines**. Bowman is a brand boss, community champion, and all-around professional powerhouse. She is a recognized expert in brand, digital, and social marketing, with a career spanning tech, media, automotive, fashion, and travel. [Page 4](#)



Amy Martin-Ziegenfuss, senior vice president, global enterprise and brand marketing, **Hilton Hotels**. A seasoned marketer, Martin-Ziegenfuss has more than two decades of experience building global brands and driving performance through high-impact, omnichannel marketing, and advertising across the customer journey. [Page 8](#)



Leah van Zelm, vice president of global marketing analytics and targeting, **Universal Parks and Resorts**. Van Zelm blends marketing transformation and business integration experience with data and insight driven, people-based, performance marketing expertise. Van Zelm joined Universal Parks and Resorts in 2018 to lead marketing science, business analytics and reporting, and marketing platforms and operations. [Page 5](#)



Kate Wik, CMO, **Las Vegas Convention and Visitors Authority (LVCVA)**, the destination marketing organization for Las Vegas and Southern Nevada. In her role, Wik is responsible for the strategic direction, management, and oversight of the marketing efforts for the destination including: advertising, brand strategy and management, brand public relations, digital engagement, marketing campaigns, research, sports marketing, and management of agency partners. [Page 9](#)

OVERVIEW

US adults' travel plans are returning to pre-pandemic levels: In a May 2021 Morning Consult poll, 64% of respondents said they planned to travel domestically this summer, slightly more than the 63% who said they traveled at least once during an average, pre-pandemic summer.

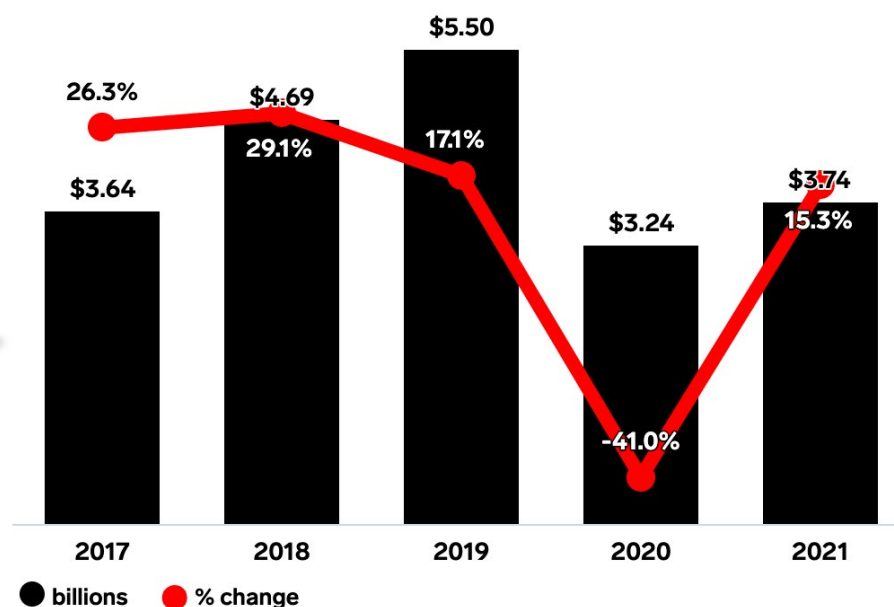
Heightened demand means higher prices—domestic fares are up 9% since April 1, per Bernstein [estimates](#) cited by CNBC. And demand for travel is increasing as more US adults get vaccinated. With 70% of the US population estimated to be vaccinated by August 10, [according](#) to The New York Times, travel demand could creep up even more and send prices even higher. But there are still a few ways marketers can capture renewed demand for travel among price-conscious consumers:

- **Discounted offerings have extra appeal.** Marketers may want to play up their deals even more than usual if prices continue to rise. That could be the deciding factor for some travelers. For example, more than half (56%) of US adults said they were likely to book a vacation if they got a discount at a hotel, per an April [survey](#) by Adweek and Morning Consult.
- **Focus on local.** Car travel [fared](#) better than air travel during the peak of the pandemic, as price- and safety-conscious consumers sought to avoid crowds. And while safety concerns may be waning, price concerns aren't. Travel marketers looking to target budget travelers may find success focusing on close-to-home getaways.
- **Retail marketers could see some windfall as consumers look for smaller splurges.** Travel-related categories like swimwear and luggage are seeing spikes in sales, according to [research](#) from NPD: Swimwear sales in March 2021 were up 185% year over year (YoY), and even up 32% compared with pre-pandemic March 2019. Consumers may not balk as much at a \$50 swimsuit purchase

compared with a \$500 plane ticket—so retailers in related industries can cash in on travel excitement without having to worry about the sticker shock.

Despite near-normal levels of demand this summer, the travel industry is still in recovery mode, and we still don't [expect](#) travel ad spending to come anywhere close to where it was in 2019. This year, digital travel ad spend will rise 15.3% to \$3.74 billion, but that won't be enough to make up for last year's 41.0% drop. Though we don't have a forecast for 2022 yet, this summer's potential rebound is an optimistic sign.

Travel Industry Digital Ad Spending US, 2017-2021



Source: eMarketer, July 2020 (see below for notes and methodologies).

eMarketer | InsiderIntelligence.com

ALASKA AIRLINES' NATALIE BOWMAN, MANAGING DIRECTOR OF MARKETING AND ADVERTISING

May 13, 2021



As normalcy returns, Alaska Airlines pivoted its marketing strategy from heartfelt imagery to messaging more in line with its fun, lively brand DNA. Through its embrace of humor and levity, the airline is reassuring people that it's OK to start thinking about travel again.

We spoke with Bowman about how Alaska Airlines is welcoming new and frequent fliers back to a changed flying experience through its dedication to next-level service, from safety and brand loyalty to its email marketing strategy.

The world is ready to start traveling again. Recent Nielsen data shows that more than 70% of adults surveyed are eager to either plan or book travel within three months of COVID-19 restrictions being lifted. How is Alaska Airlines responding to this anticipated surge in travel bookings?

After a year of very low traffic demand, we're excited to see it coming back and we've been adding new routes, and making sure that we're ready. We had made a lot of changes to the flying process to ensure that we had important safety and cleaning procedures in place. Those will all stick around and we're just ready to welcome people back.

What are some differences that you're noticing in the ways consumers are booking their travel now?

We've seen that travel is much more meaningful now, whether it's reconnecting with friends and family that they haven't been able to see, celebrating big milestones like anniversaries or birthdays, or even rescheduled weddings. And then we're really seeing a lot of bucket list

travel. People are realizing that time is short and they want to have those big trips.

Apple's iOS 14.5 update is set to upend digital marketing. Travel marketers in particular are going to be impacted because of the limitations that are placed on third-party data collection, but also geolocation. Tell us how Alaska Airlines plans to rework its strategy to take more of a first-party data approach.

We've been putting in place the building blocks to be able to leverage more of our first-party data. We've also been partnering with Google on a predictive lifetime value model, which will help us be smarter about how we reach people. And then we'll lean into more of our own channels. Email is a powerful tool and I'm really excited to see us use it in a way that's different from other travel brands. The typical travel way to manage email is to send low fare offers. But I think we have an opportunity to tell a much deeper story.

How do you see brand loyalty evolving as the world reopens?

I think that there are two things with brand loyalty. For our most loyal flyers in the Pacific Northwest, I think they've missed us. They're excited to get back. They know that we're going to take care of them, which is something they really need. And then for new travelers, we're really hoping that because our loyalty program is so generous that they'll give us a try. That, combined with our amazing caring service, will really win people over.

Want to learn more about how Alaska Airlines attracts new audiences with its loyalty program?

Watch our video interview

UNIVERSAL PARKS AND RESORTS' LEAH VAN ZELM, VICE PRESIDENT OF GLOBAL MARKETING ANALYTICS

May 21, 2021



Whether it's the visitors' app or in-park operations team, Universal Parks and Resorts is dedicated to delivering seamless guest experiences. To create relevant, immersive moments, the theme park relies on its core data and an integrated customer data platform (CDP).

We spoke with van Zelm about how Universal's cross-functional teams and data platforms come together to enable and support guest experiences, and how that success rests on visitors' willingness to share personal data.

From your experience, what are some lessons that you can share with travel marketers that are anticipating their own reopenings?

I think the volatility in both regulatory actions, as well as marketing platform actions and consumer expectations, has changed so much, and is somewhat unpredictable for us. So we have really embraced agility as a core theme across the organization, both in how we work within the marketing organization, and also how we support our technology that enables the guest experience.

Within your role, you're leveraging data analytics to support the customer experience as regulations are changing dramatically and customer identity and data landscapes are being turned upside down. How do you continue to drive relevant and meaningful experiences to customers of all ages?

I think consumers see the value in sharing their preferences with us so we can deliver a relevant and seamless experience. As Apple, Google, and others quickly change their protocols and the data that

they're willing to share, as well as receive, to customize the experience within advertising platforms, we're trying to build our platforms in such a way that our core foundational data platform is integrated into a CDP. And that CDP is the integration point between the ad platforms as well. That allows us to really stay current with the changes in the advertising ecosystem.

There are so many levels of data compliance now, both domestically and abroad. What are some best practices you can share for how your team continues to stay nimble?

We are working in a very cross-functional manner across our legal team, our technology compliance team, marketing, and other groups to ensure that we're dividing and conquering. We're tracking policies that are arising both within the legal and regulatory system, as well as within our partner ecosystem. We share that information and we develop plans against each effort that we have to implement.

We recently have adapted to some of the Apple iOS 14.5 compliance changes and are preparing for some of the Chrome changes. And as we do that, working together in a cross-functional manner allows us to look at different aspects of compliance so that we can understand where data is flowing from and to, and ensure that we're being fully comprehensive.

We're updating all of our policies by being very transparent about how we're using data. It's largely about a really amazing guest experience, because the more relevant we are, the more our guests want to work with us to deliver a great experience rather than opt out of tracking or personalization.

**Want to learn more about how
Universal approaches data compliance?
[Watch our video interview](#)**

HOW TRAVEL MARKETING IS USING CTV TO ENGAGE AND INSPIRE

This article was contributed and sponsored by [MNTN](#).



Ali Haeri
VP of Marketing, MNTN

The COVID-19 pandemic affected nearly every business, but few felt the impact as intensely as the travel industry. Almost overnight, airplanes were grounded, hotels were closed, and would-be travelers canceled trips and fortified themselves inside their homes.

Sadly, the pandemic continues to ravage other nations, but the US is finally seeing a light at the end of the tunnel. After a year of lockdowns and travel bans, it's no surprise that consumers are ready to plan vacations, visit loved ones, or resume business travel—and marketers have a once-in-a-generation opportunity to capitalize on these travel aspirations.

Your audience is looking to you

The pandemic has taxed our collective consciousness. After a year of lockdown, it's no surprise that people are [anxious to start traveling](#) beyond their four walls again. In [a 2020 survey](#) by Apartment Guide, nearly a quarter of respondents said traveling is the activity they missed most during the pandemic. A [2021 Longwoods International poll](#) found that more than nine out of ten American travelers have travel plans for 2021, and 63% planned to travel in the first half of the year. Meanwhile, car rental companies that spent the pandemic selling off unused fleets [are experiencing massive shortages](#) as customers start to embark on road trips again in massive numbers.

The numbers don't lie—consumers are ready to travel again. Travel brands are in a unique and envious position—their current and prospective customers are eager for an excuse to travel and asking brands to motivate them. Successful advertising post-pandemic means producing content that inspires, creates FOMO (fear of missing out), and motivates the audience to book their next trip to see the world.

Show them the world from their couch

During the pandemic, consumer habits changed. Forced indoors, many turned to their television as their window to the world. The good news for travel brands? That window is the perfect place to meet them.

Traveling is a multisensory affair. The sights of beautiful vistas, the sounds of bustling cities, the wonder and awe of natural landmarks. Today's television fidelity, coupled with larger screens and lower costs, make it easier than ever for viewers to feel like they're "there."

With connected TV (CTV) devices and streaming service subscriptions on the rise, marketers have the perfect opportunity to showcase travel destinations and beam audio-visual experiences into the prospect's home. CTV offers marketers the opportunity to meet the audience where they are, but it doesn't stop there.

A travel brand success story

[Take this example](#) of a major travel site. By leveraging CTV and working with MNTN, their campaign targeted users using geolocation, purchase history, and more. The audience was then served ads across popular streaming networks, followed by related display ads served to households who viewed the ad on TV to keep the brand's message top of mind.

As a result, the campaign was remarkably effective at delivering the brand's message. Most viewers watched the ad in full and engaged with the brand, prompting a strong 5.28% visit rate—an incredible return on investment.



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HILTON HOTELS' AMY MARTIN-ZIEGENFUSS, SVP, GLOBAL ENTERPRISE AND BRAND MARKETING

June 3, 2021



For Hilton Hotels, first-party data and consumer research is key to ensuring that guests have a comfortable—and memorable—stay, especially in today's post-COVID-19 travel environment.

In our conversation with Martin-Ziegenfuss, she explained how customer data and Hilton's personalization strategy informs everything from the hospitality brand's advertising campaigns to guest amenities like flexible booking policies, contactless check-in, and keyless room entry.

Let's first talk about Hilton's "To New Memories" campaign. The creative highlights vacation memories with loved ones, and was based off of Hilton's own consumer research. How did this research inform the creative?

Hilton's consumer research during the pandemic was very enlightening. It basically unveiled to us that we were experiencing a travel memory deficit. Something that people weren't getting to do during the pandemic was make memories. What that really meant was that they weren't getting to connect with people, with places, with the things that they love, and they really wanted to get back out there and reconnect with family and friends. That led us to this, To New Memories platform, which is all about how people can get back out on the road. They can do it with friends and family. They can reconnect and start making new memories, and they can do it at Hilton hotels and brands across the globe.

How did Hilton rework its guest services to become more flexible for its visitors?

It was important that we were as flexible as possible with our guests as people were starting to travel again. That's another consumer insight that we found. With the uncertainty that came with the pandemic, and how quickly things are changing, people found that they needed to be able to change their plans at the last minute. They expect the brands that they buy from to meet them there in terms of flexibility. So we make sure that we have highly flexible cancellation policies. Then we make sure that the amenities on site are flexible as well.

Speaking of guests, data privacy regulations are constantly changing, and having that one-to-one or direct connection with the customer is always of utmost importance for marketers. How is Hilton planning for the cookieless future?

We're certainly looking to leverage our first-party data as much as possible to build strong, deep relationships with customers. We know that when they opt into those relationships it's because they want a personalized experience, and they're happy to exchange their data for a customized experience. We're definitely doubling down there, but we're also looking at how it's going to affect our targeting and our marketing and advertising, and thinking about how we're going to move to a different kind of identifier that hasn't been sorted out yet in the industry.

We use customer data currently to let them know what's coming that might be of interest, personalized offers and opportunities, places they might like to go, as well as making sure that we're providing the right products.

Want to learn more about how Hilton is preparing for the cookieless future?

[Watch our video interview](#)

LAS VEGAS CONVENTION AND VISITORS AUTHORITY (LVCVA)'S KATE WIK, CMO

June 30, 2021



The Las Vegas Convention and Visitors Authority (LVCVA) is welcoming business and leisure visitors back with a new motto that touts the city as a hub of innovation, with experiential offerings only it can provide.

In conversation with Wik, she shared how Las Vegas evolved its strategic marketing message post-COVID-19, and how, as a destination marketer, LVCVA supported the hard-hit hospitality community during the pandemic.

Tourism has returned to Las Vegas after what was a very long year. This must be so exciting for LVCVA. Tell us a bit about who is booking a stay.

We're seeing active bookings from all of our segments, whether it's casino guests, meetings and groups, or just the leisure traveler. I have three words for you: pent-up demand.

What are some differences that you've noticed in booking behaviors?

The booking window has gotten much shorter over the pandemic, and we're still seeing a little bit of that trend. Typically, we expect about a 30- to 45-day booking window for our leisure traveler. The ability to plan further out just wasn't there, which is understandable. Some of those trends have continued into this post-pandemic period where consumers are really deciding what to do this weekend or next weekend.

Whether it's CES or Shoptalk, Las Vegas is the city for industry events. How are you planning to welcome back events and attendees?

We just opened a billion-dollar expansion here at the Las Vegas Convention Center. But what Vegas is known for is innovation. So it's not just about building or expanding, it's about re-imagining the guest experience. One

thing that we recently opened at the convention center, in partnership with Elon Musk's The Boring Company, is the Vegas Loop, an underground tunnel system where you can whisk across our campus in a private Tesla from one end to another in two minutes. Being a 200-acre campus, we needed a solution that would help us transport people across the campus quickly, safely, and conveniently.

The Las Vegas tagline, "What happens here, stays here," is one of the most-recognizable slogans in history. You and your team recently unveiled a new campaign. What can you tell us about the concept?

Building off of "What happens here, stays here," we evolved it to "What happens here, only happens here" in two new national TV spots, "The Dance" and "Boom Boom Clap." We wanted consumers to understand, coming off of 16 months of isolation and boredom, that only Vegas offers you the freedom of choice and to really be able to live life to the fullest again.

As the city reopens, how does LVCVA support hotels in the area? They were hit especially hard in the past year.

When the pandemic hit and we shut down for 12 weeks from mid-March through June 2020, it devastated our communities. Our role was to partner with all of the big hotels across Las Vegas to align on how to reopen safely. We aligned on communication and messaging to make sure that we had streamlined efforts across the destination.

Want to learn more about how Las Vegas welcomed visitors back?
Watch our video interview

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