



Catalyzing Crisis Recovery

Free Tools & Research from Arrivalist



Our Clients

Arrivalist Serves:

- 90+ Destinations
- 40 US States
- Brand USA
- 4 of the 10 Largest US Theme Parks
- 3rd Largest Casino in the US
- 10+ Travel & Tourism Attractions
- Airports
- International destinations in Canada, Asia Pacific, South America and the Caribbean





How Arrivalist Works

- Anonymized, multi-sourced GPS location data for millions of users, accurate to 30 feet
- Rigorously balanced to be an accurate representation of the US population
- Privacy Law Compliant (CCPA & GDPR)





Key Insights



TOP ORIGIN MARKETS

Where do visitors come from?



REPEAT VISITATION

How often do visitors return?



LOCAL V. NON-LOCAL

Where do visitors frequent compared to residents?



CROSS-VISITATION

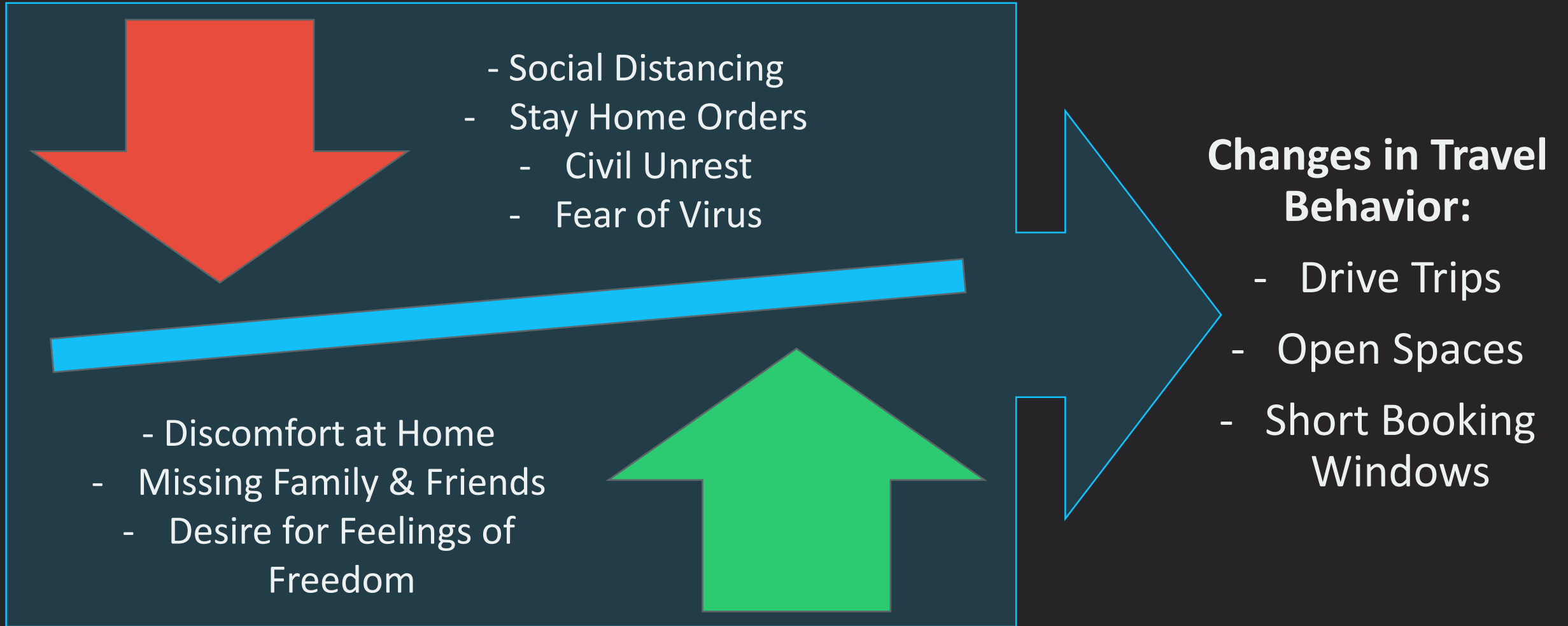
Where do visitors go while in market?



ARRIVAL LIFT

Are digital media exposed visitors more likely to arrive?

The Recovery is Coming



Let's Prepare Together.





Tools and Resources for Idaho Tourism Industry:


- ① Research on visitation before and during COVID-19 crisis
- ② The US Daily Travel Index (free)
- ③ Owned media indicators



Impact of COVID on Idaho Trips

Arrivalist





In the face of chaos, answering the big questions

When?

Who (aggregate)?

How?

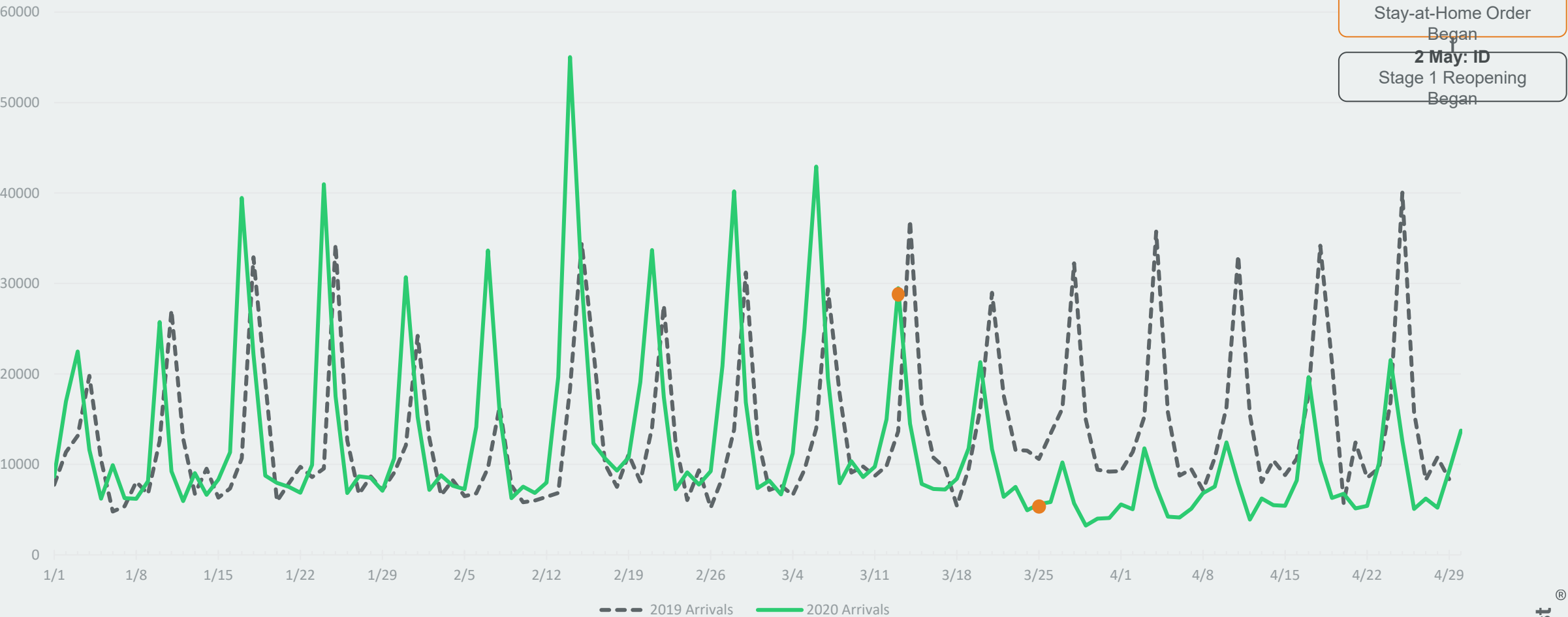
How much?

Where?

What?



Overnight Arrivals to Idaho Destinations: Year over Year Comparison



YOY
△

	January	February	March	April
YOY △	10.1%	28.7%	-31.3%	-81.9%

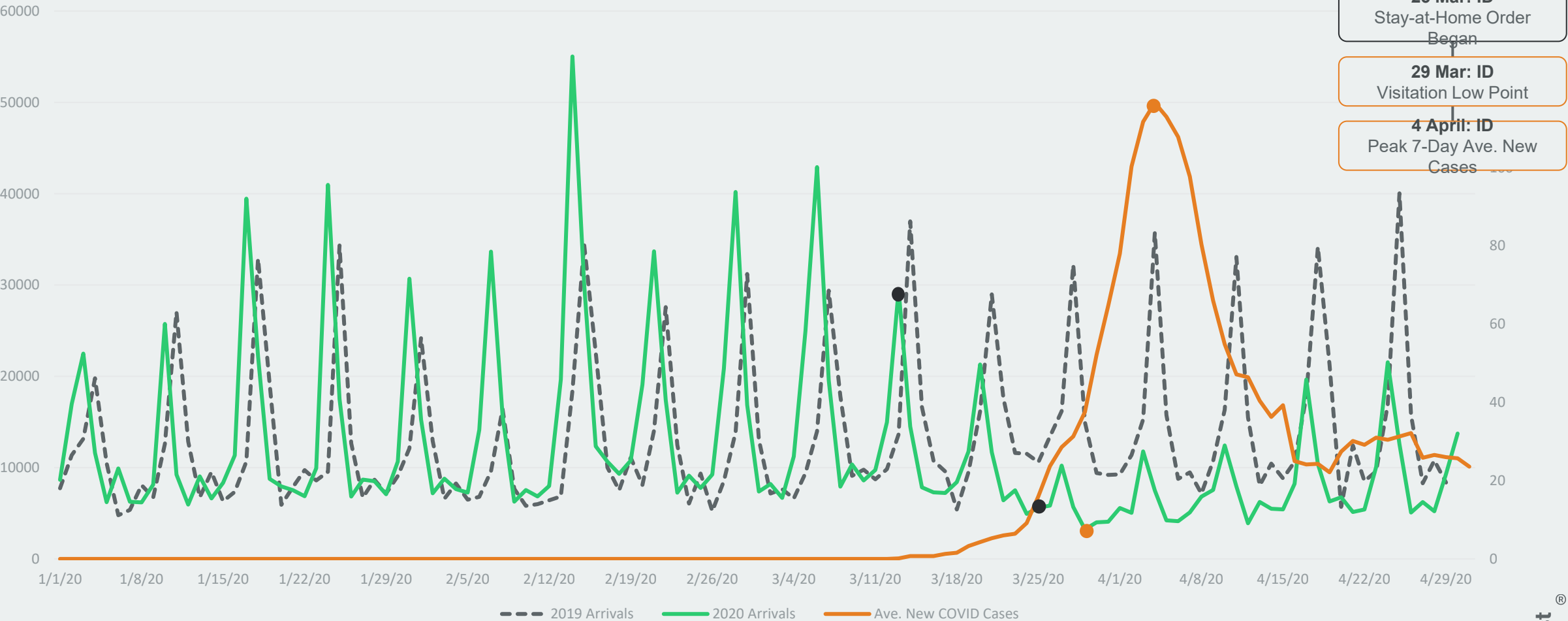
Date Ranges: 01.01.2019– 04.30.2019 & 01.01.2020 – 04.30.2020 | Data Compiled: 06.01.2020 | Balanced Panel | Overnight Stays

Only





Overnight Arrivals to Idaho Destinations: COVID Impact



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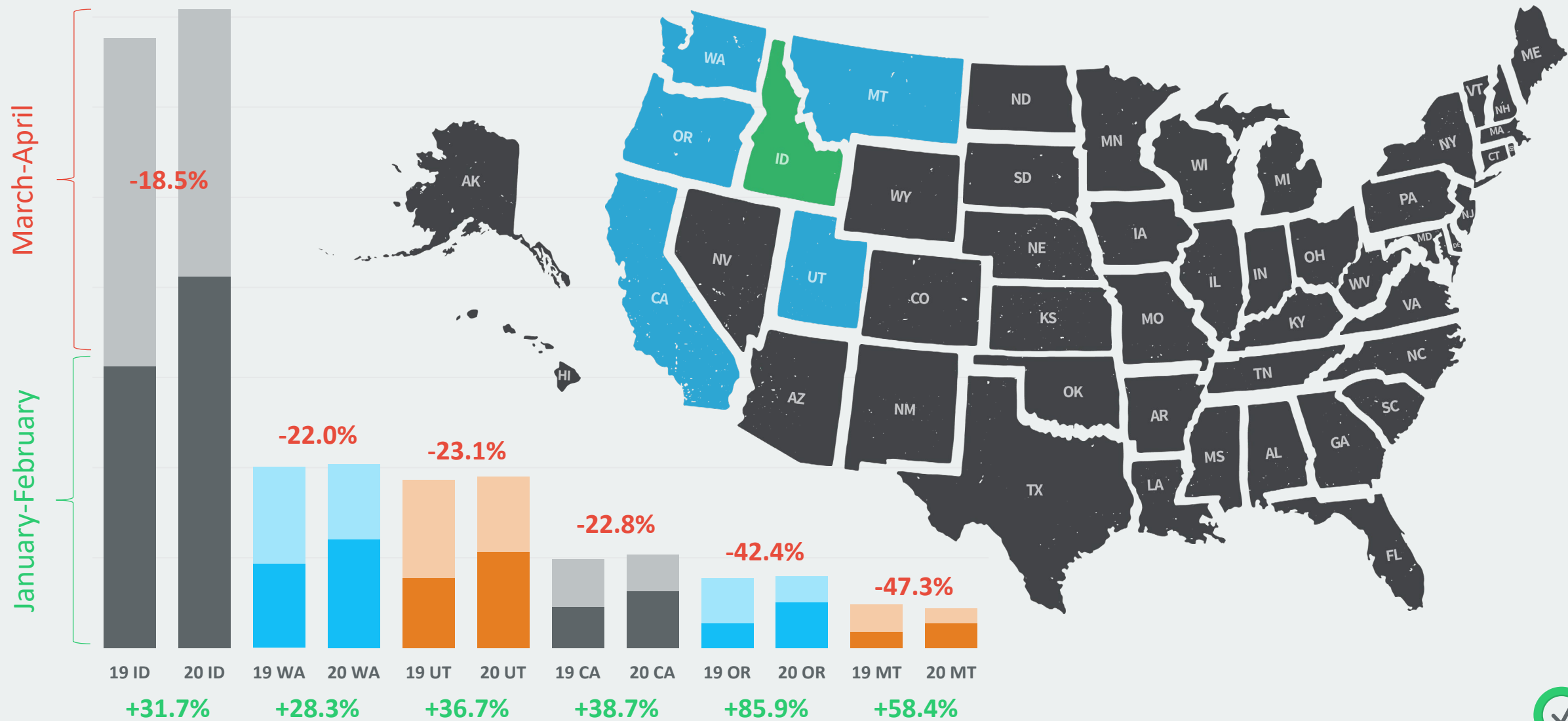
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Impact to Date | Jan-Feb v. March-April Year over Year

WA, CA & UT most resilient out-of-state markets



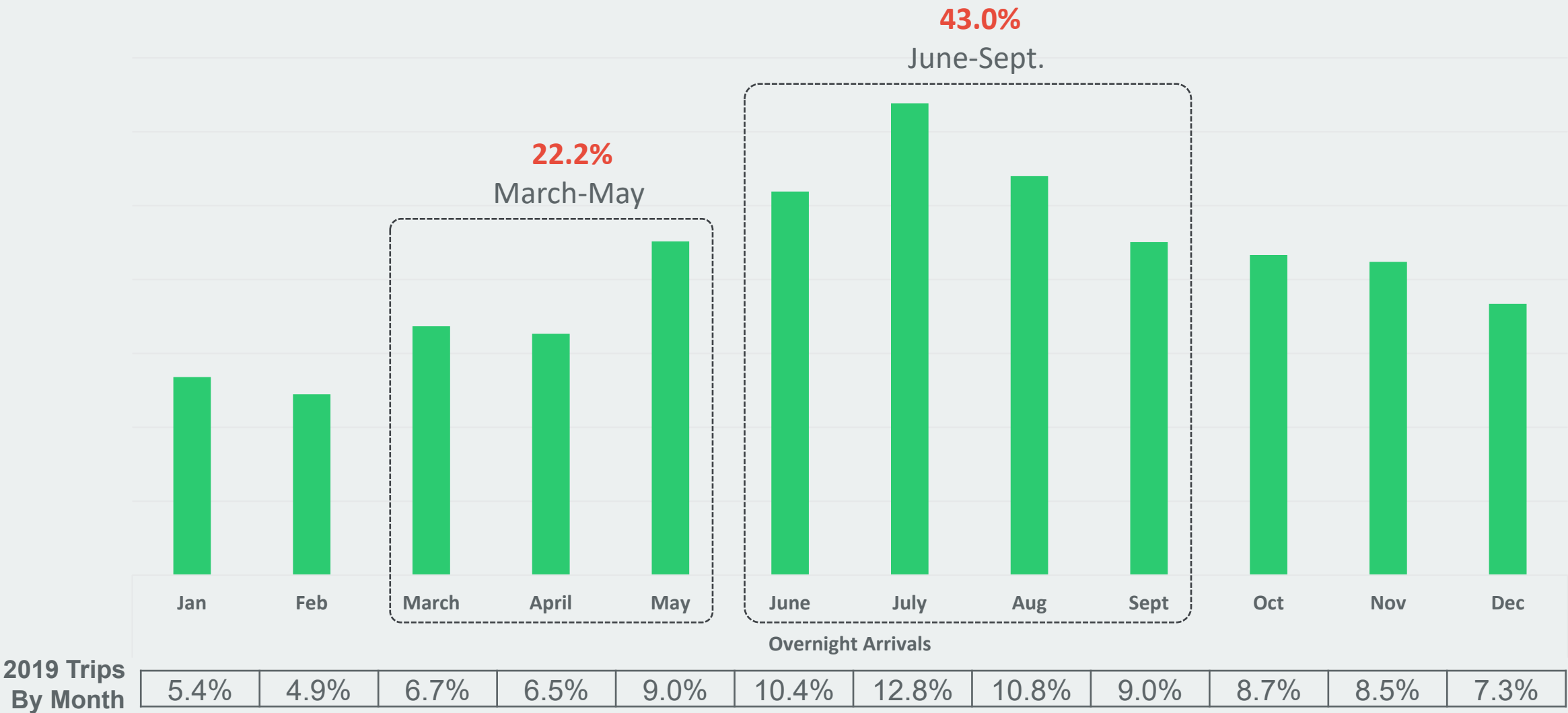
Looking for Opportunity in Recovery

Arrivalist



Arrivals by Month: Assessing Loss & Opportunity

Spring is significant, but summer offers rebound potential



Total Balanced Panel Overnight Trips Estimated: 6.8M

Out of State Market Value: Volume, Loyalty, Impact

Markets with strong volume, repeat visit rates, and length of stay, all with a propensity to drive, could be considerations for targeting during recovery.

TOP 5 BY VOLUME		
1	Salt Lake City, UT	27.9%
2	Spokane, WA	11.7%
3	Seattle, WA	9.6%
4	Portland, OR	7.0%
5	Yakima, WA	4.5%

TOP 5 BY REPEAT VISIT RATE		
1	Boise, ID	58%
2	Spokane, WA	54%
3	Salt Lake City, UT	43%
4	Yakima, WA	38%
5	Missoula, MT	34%

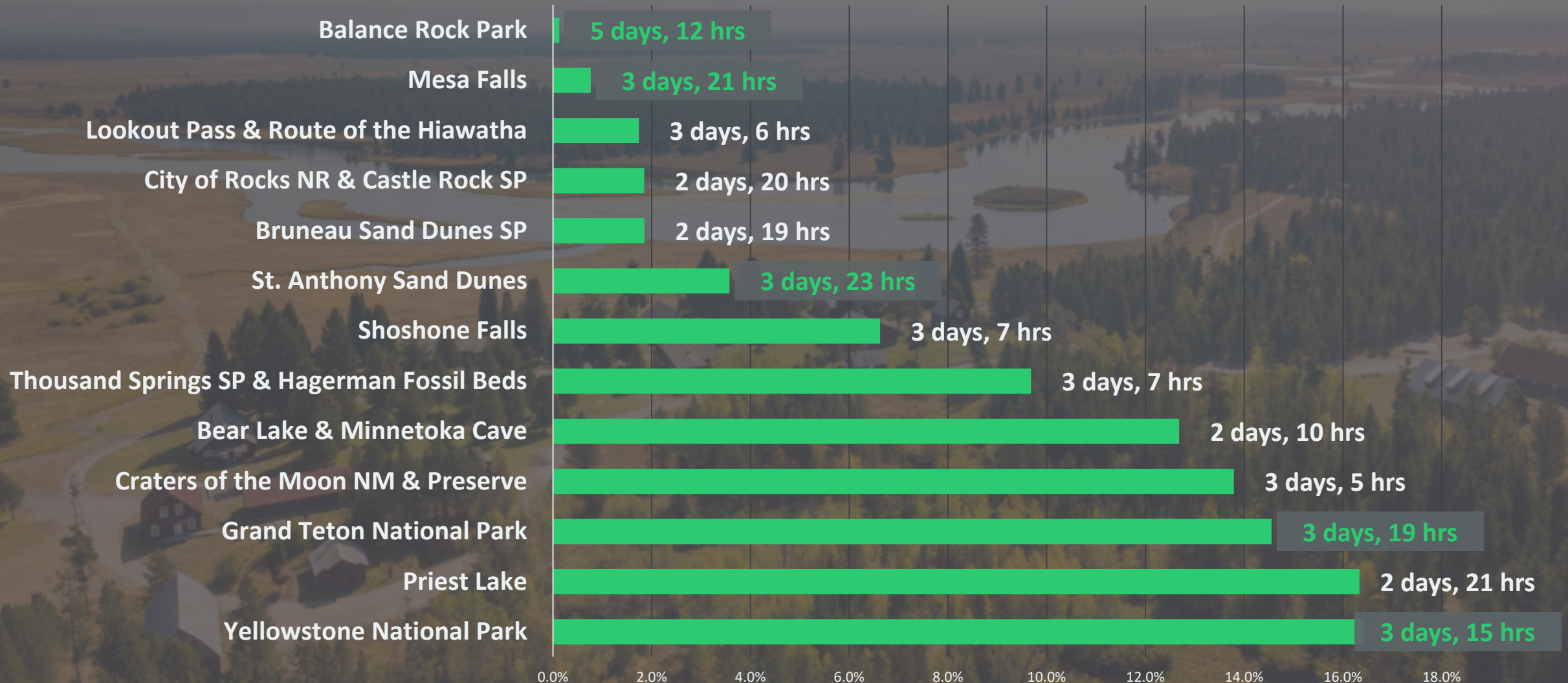
TOP 10 BY LENGTH OF STAY (DAYS)			X VOL.
1	Los Angeles, CA	4.1	607,663
2	San Diego, CA	4.1	132,085
3	Phoenix, AZ	4.0	250,732
4	Las Vegas, NV	3.9	136,878
5	Dallas/Ft. Worth, TX	3.9	75,452
6	Denver, CO	3.7	271,238
7	San Francisco, CA	3.6	311,856
8	Sacramento, CA	3.5	286,528
9	Eugene, OR	3.5	80,980
10	Reno, NV	3.2	131,583

All 7
Potential
Target
Markets
Have LOS
Over 3.5
Days



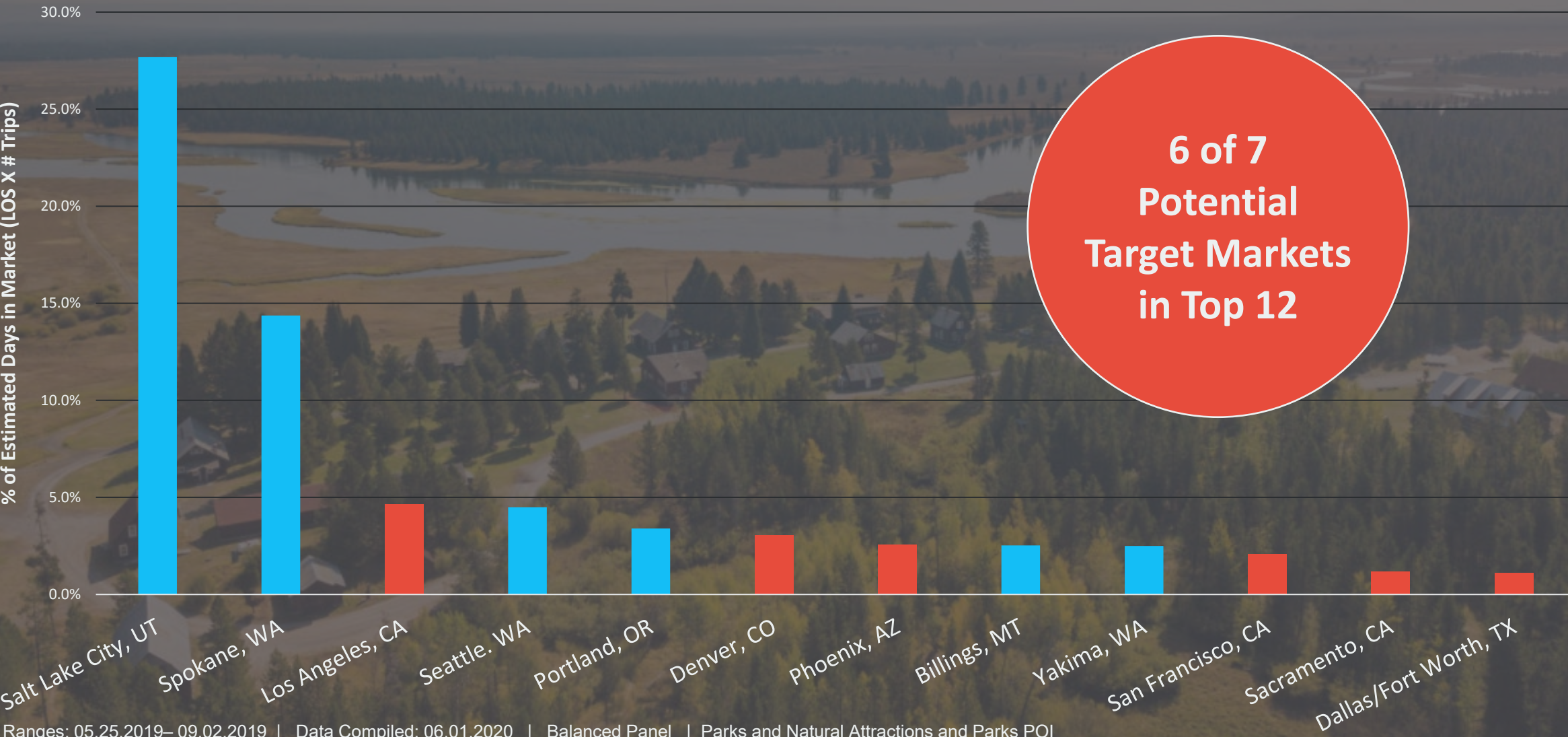
A MOVE IN BEHAVIOR TOWARD OPEN SPACES & PARKS

Volume & Length of Stay in Idaho for 2019



A MOVE IN BEHAVIOR TOWARD OPEN SPACES & PARKS

Top OOS Impact Markets for Summer

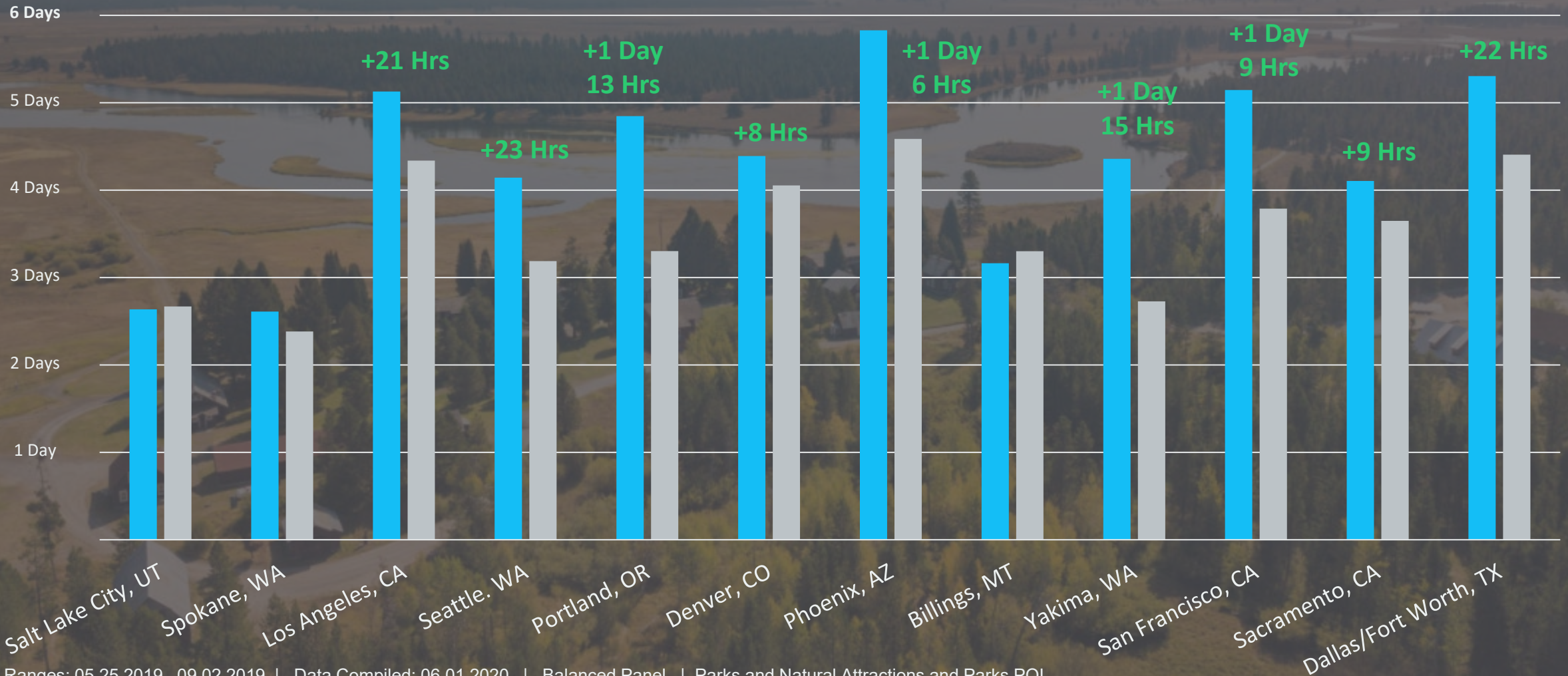


A MOVE IN BEHAVIOR TOWARD OPEN SPACES & PARKS

Length of Stay: Summer Park Trips v. All Summer Trips

**Park Trips
9 Hours Longer
on Average**

■ Park POI Trips ■ All Trips





In the face of chaos, answering the big questions

When?

Who (aggregate)?

How?

How much?

Where?

What?

And back to...When?





Most of us agree...

Tourism's recovery from the COVID-19
pandemic will begin in
Drive Markets First





Daily Travel Index (DTI): Methodology

- Filtered view of drive market activity by American travelers
- Index measurement of daily drive market travel volume relative to average volume observed in February 2020
- The DTI is based on the Arrivalist trip model:

Users travel at least 50 miles from home

Users spend at least 2 hours in their destination

Certain types of trips are excluded: freight, deliveries, commuters, etc.



Arrivalist US Daily Travel Index

Daily Travel Index

- 73.8%

March 29, 2020, Sunday

Day of Week Change

- 20.9%

Sunday vs Prior Sunday

Week over Week Change

- 29.3%

Last 7 Days vs Prior 7 Days

Home State

(All)

Home State:

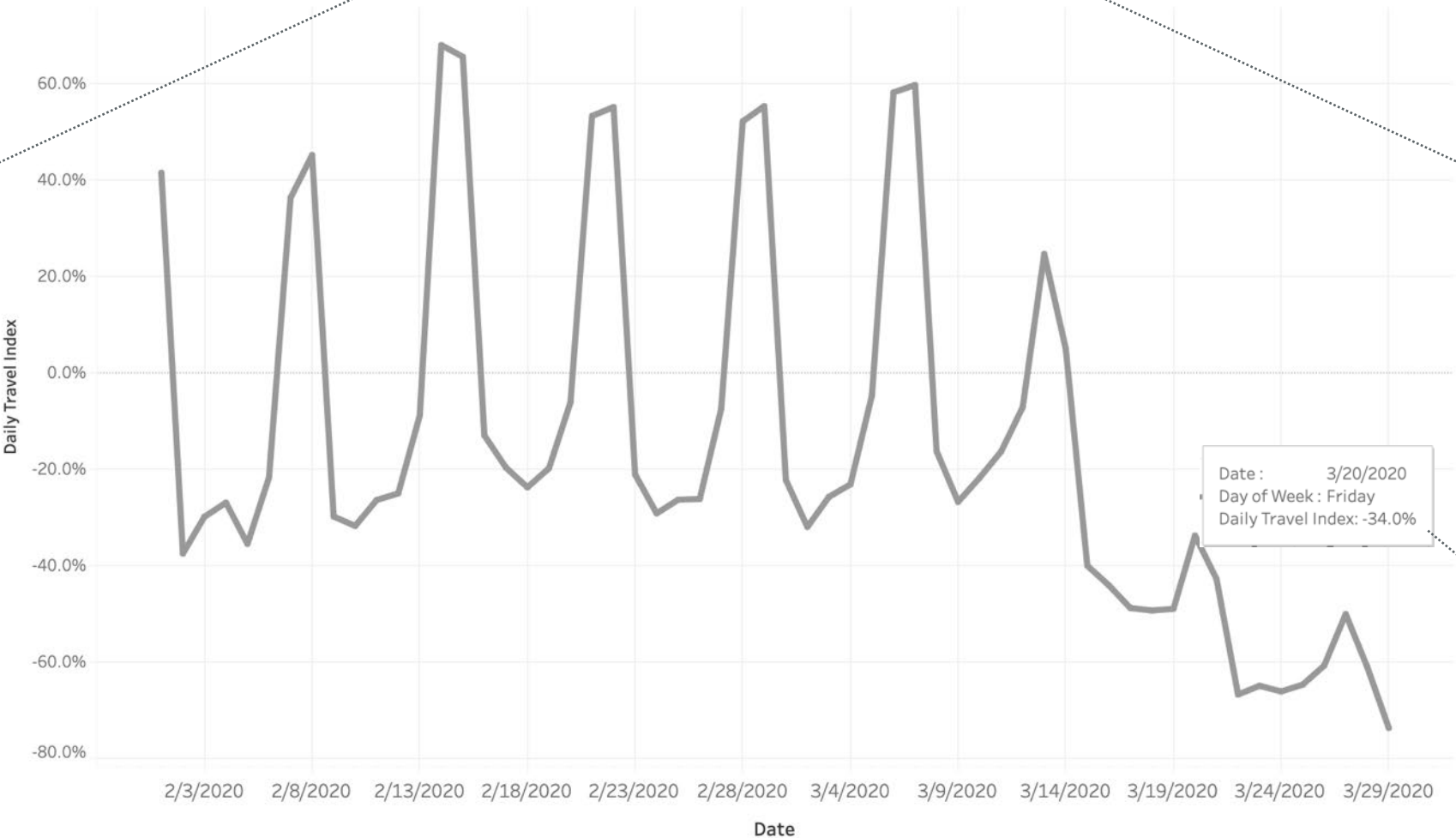
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Last updated: 03/29/2020

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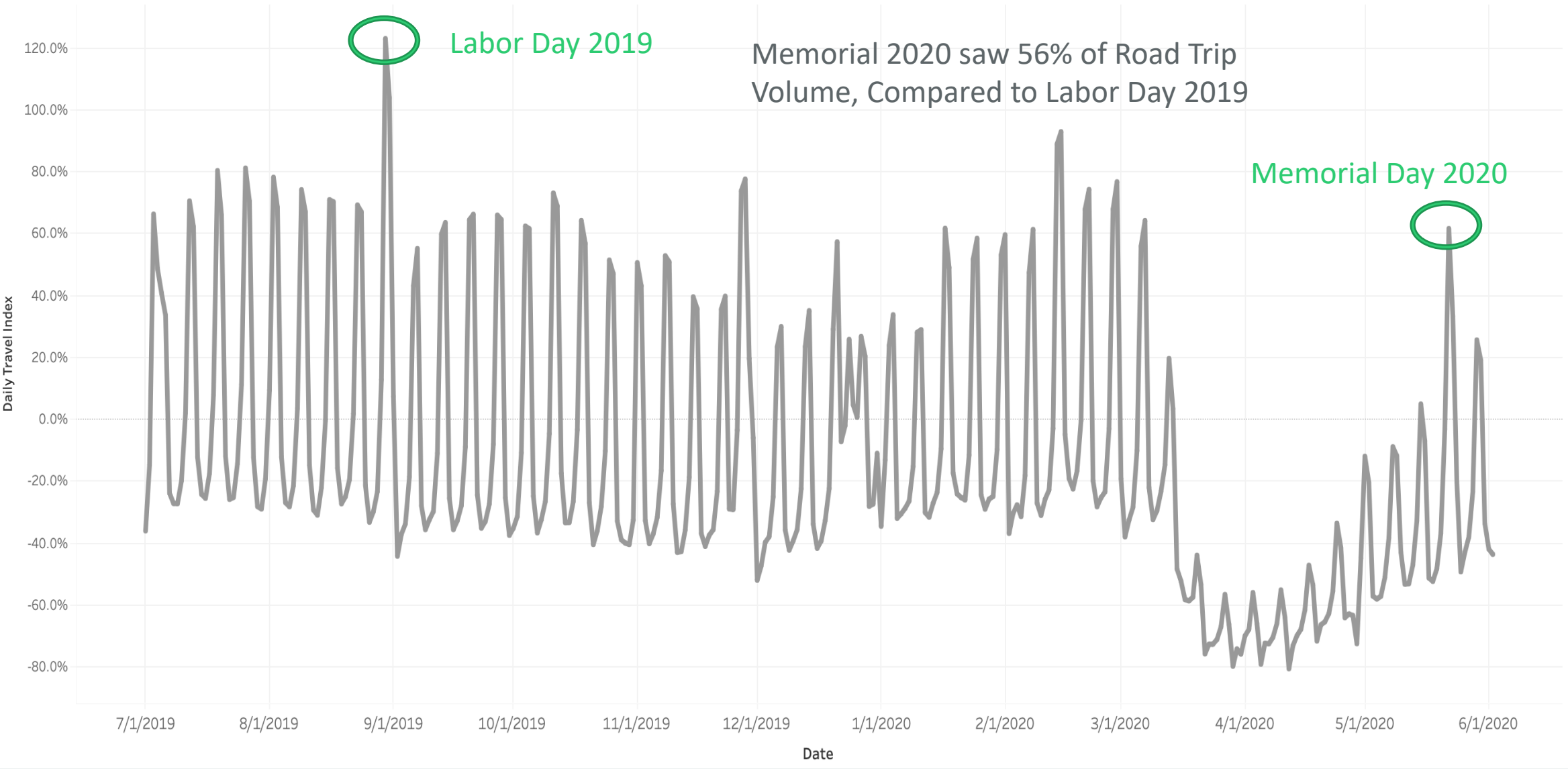
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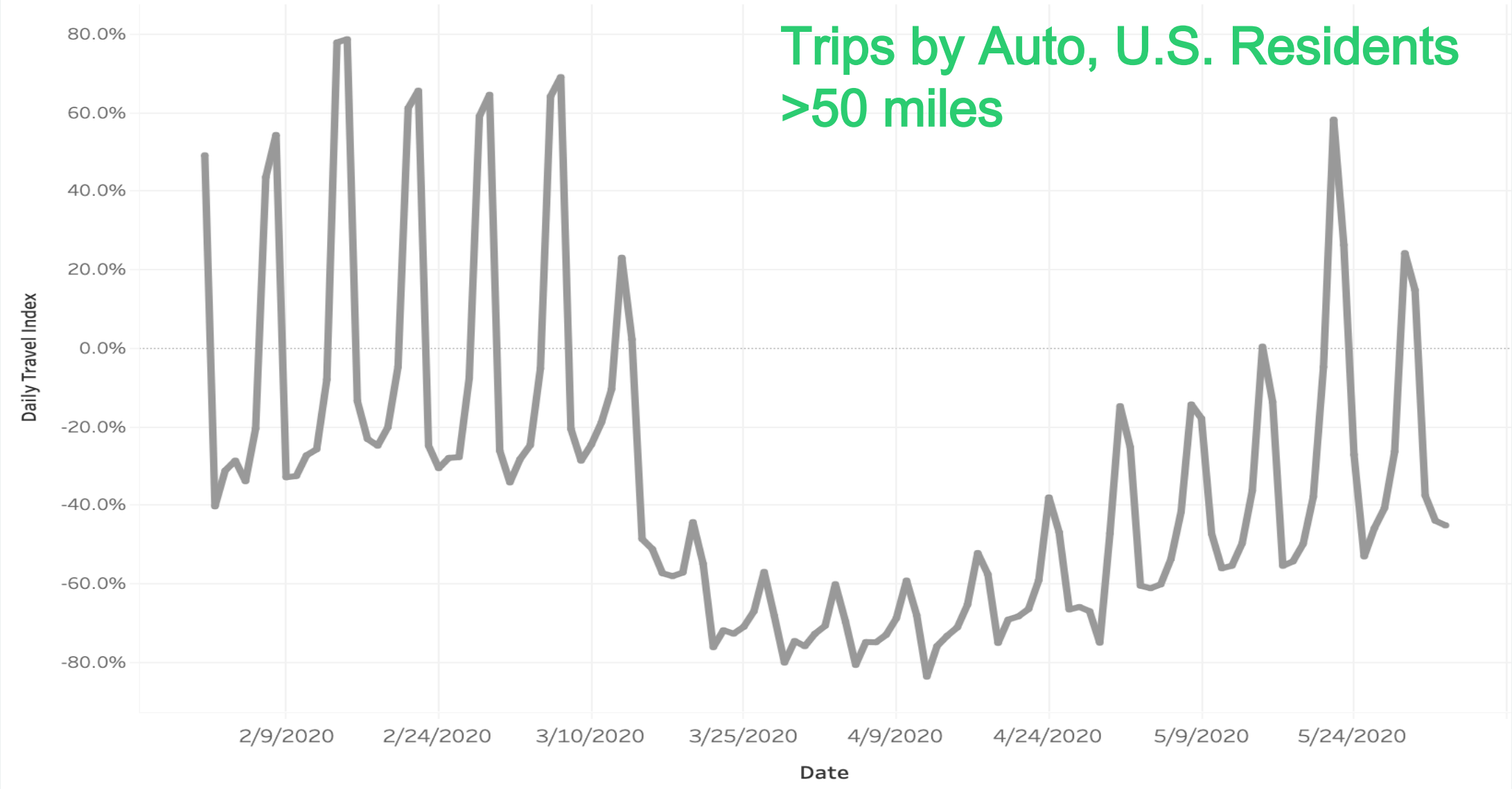
What We've Observed So Far...



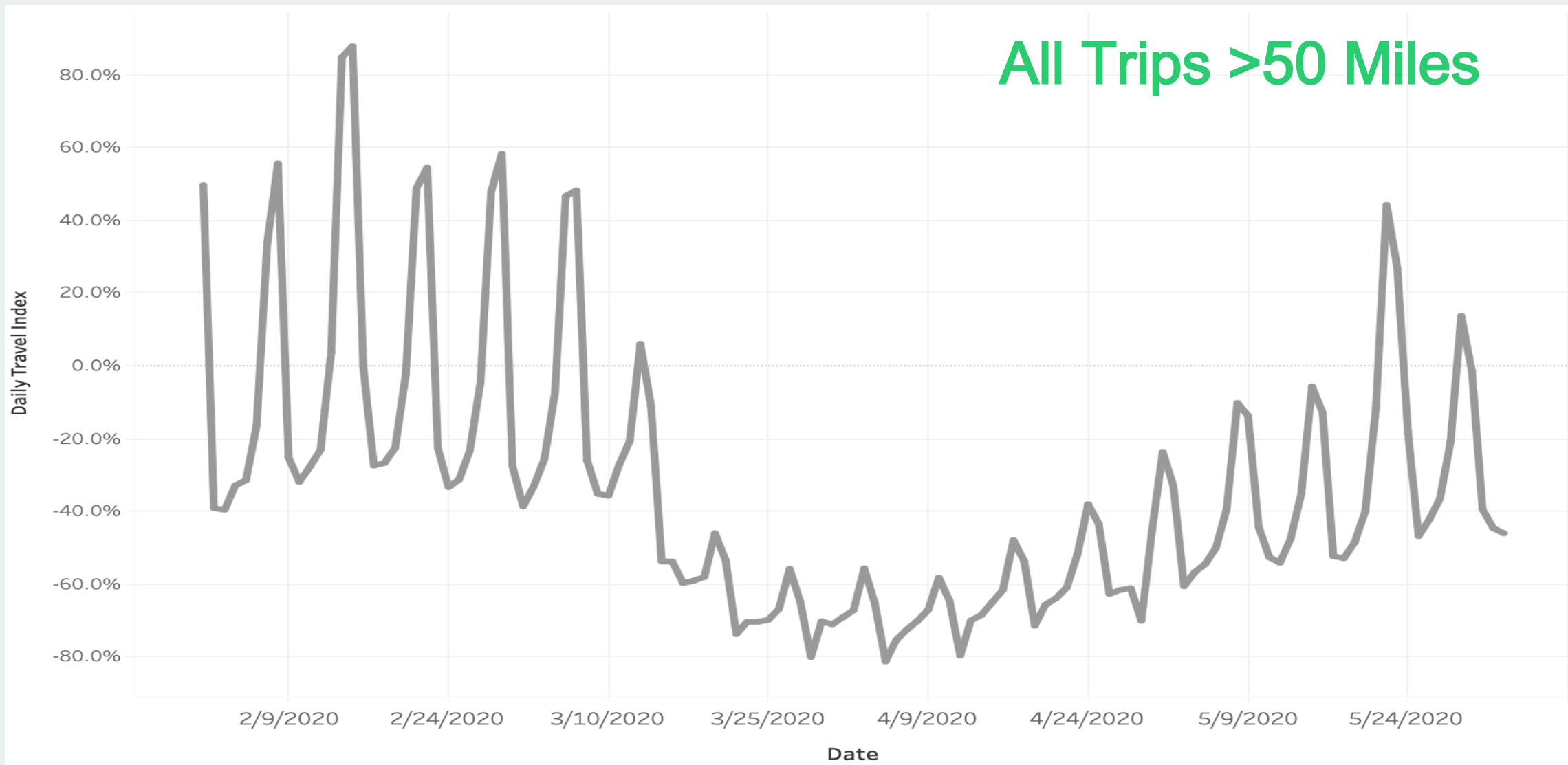
Travel is Rebounding...but Slowly and With a Long Way to Go



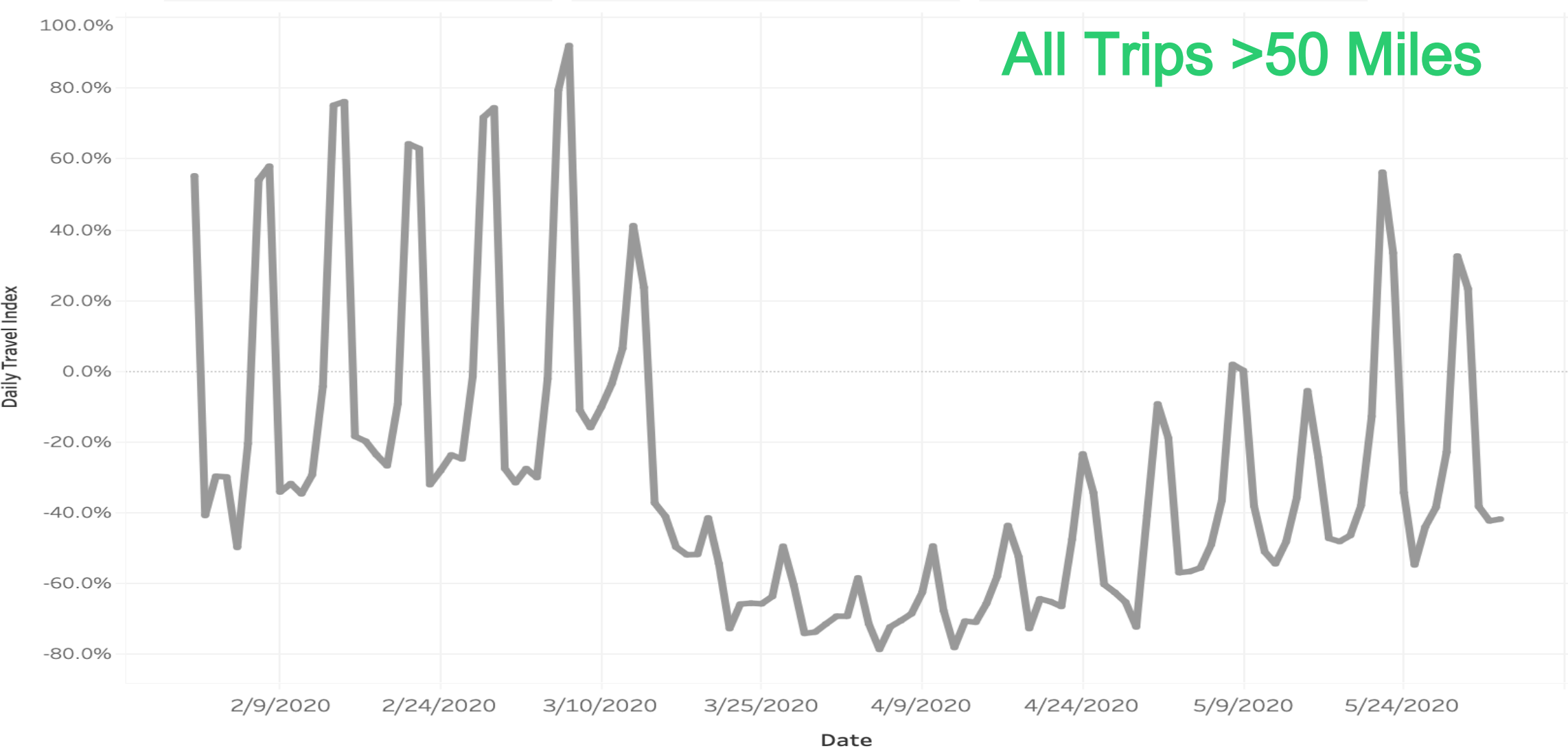
Closer Look: Recent National Travel Trends



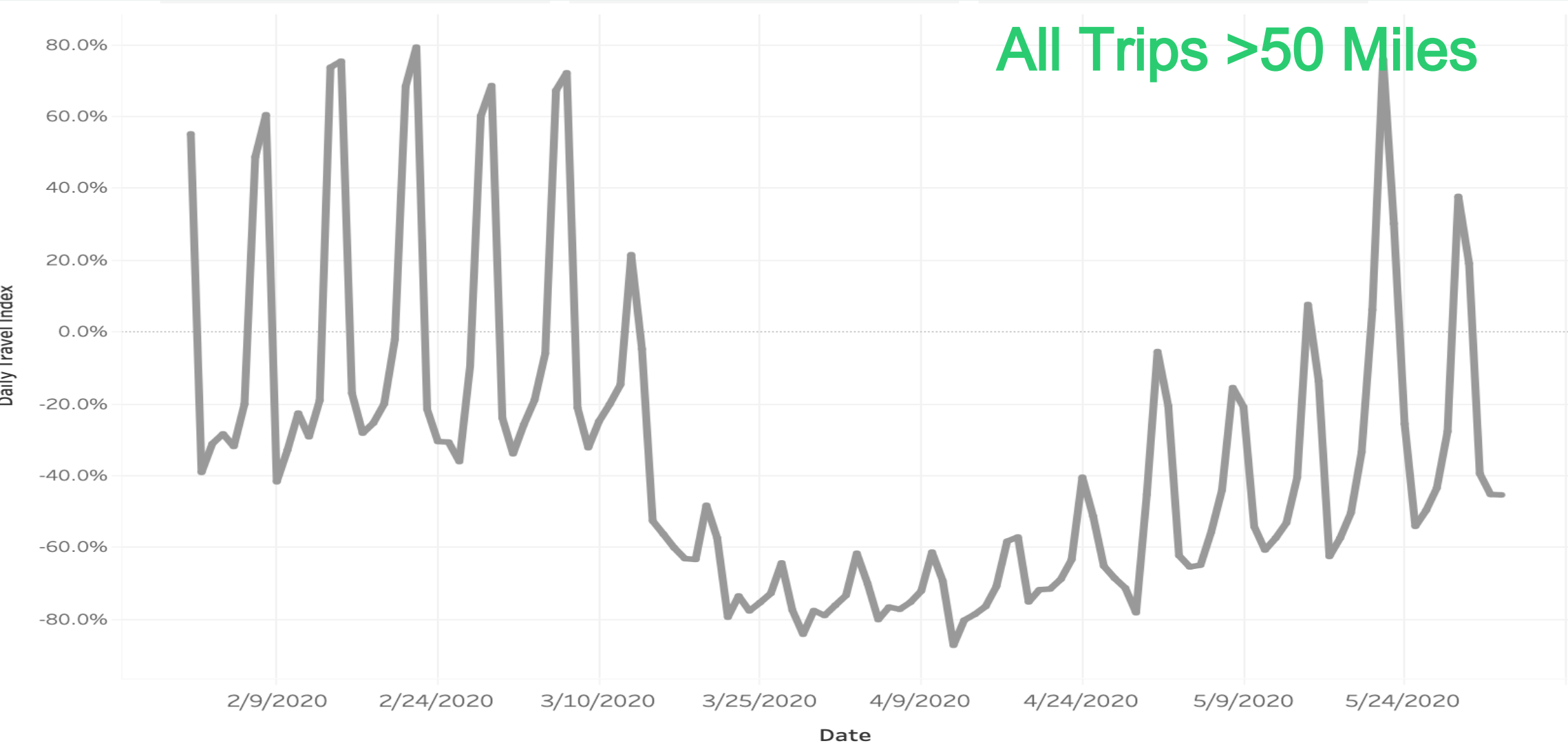
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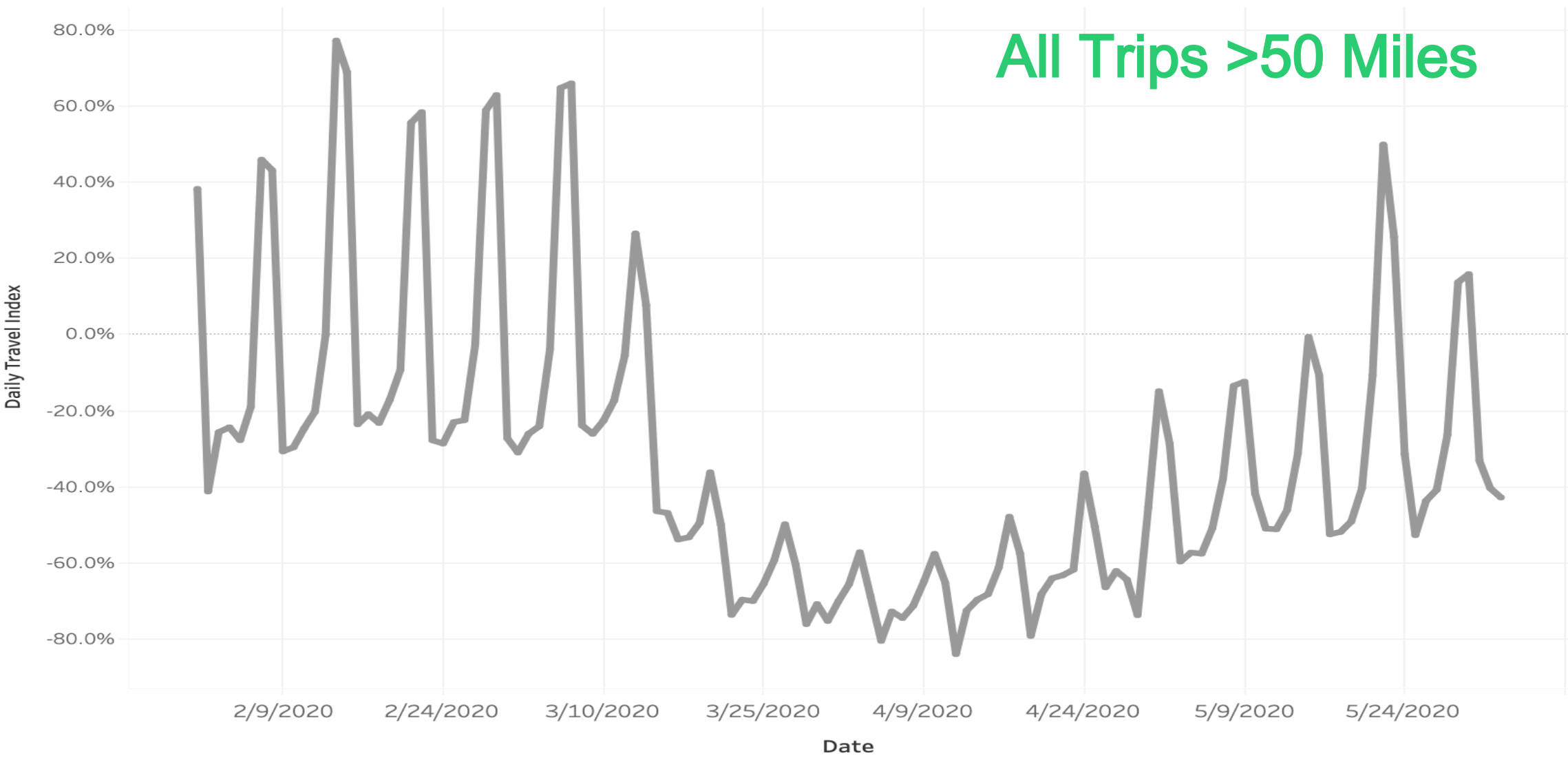


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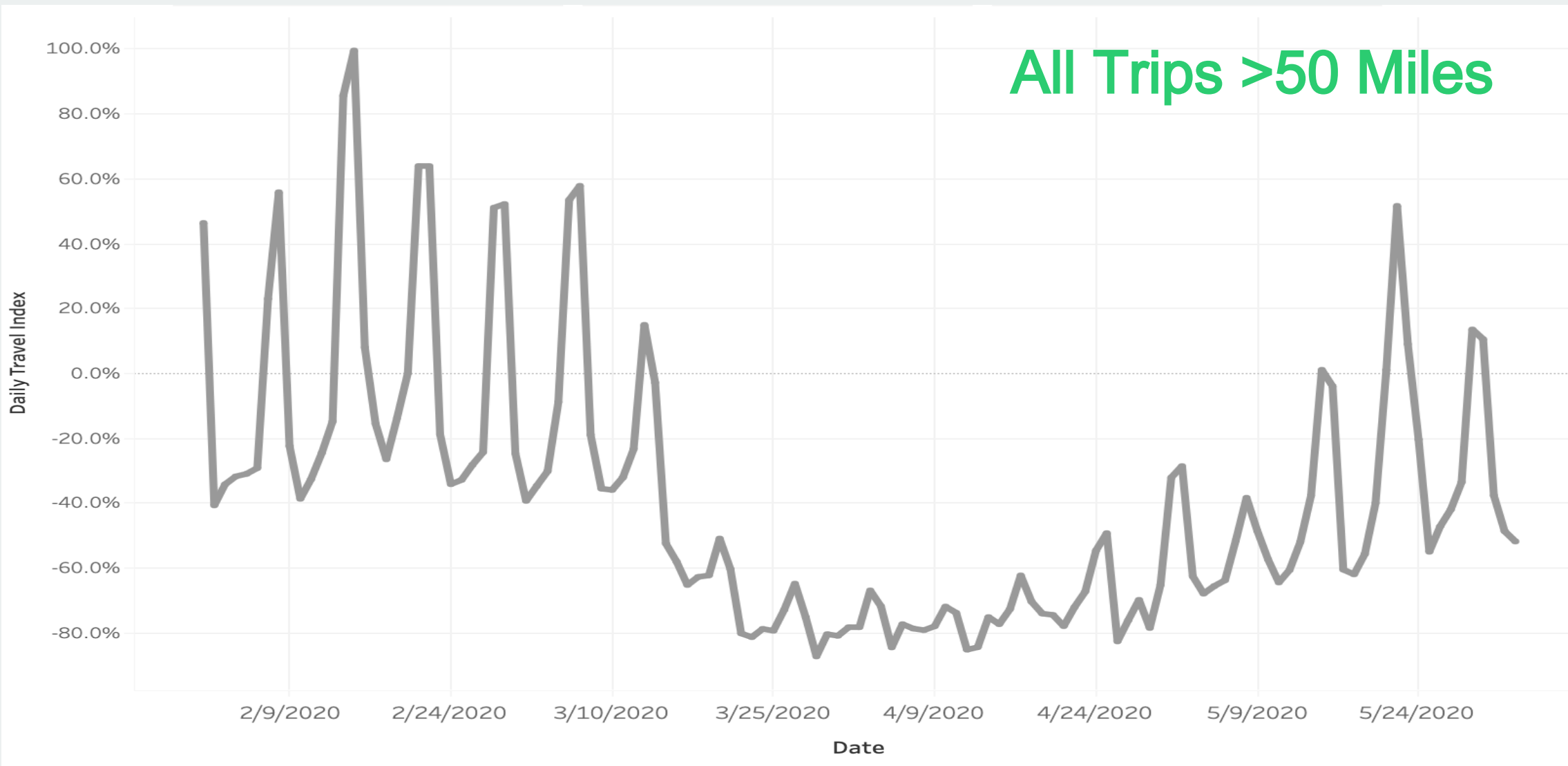



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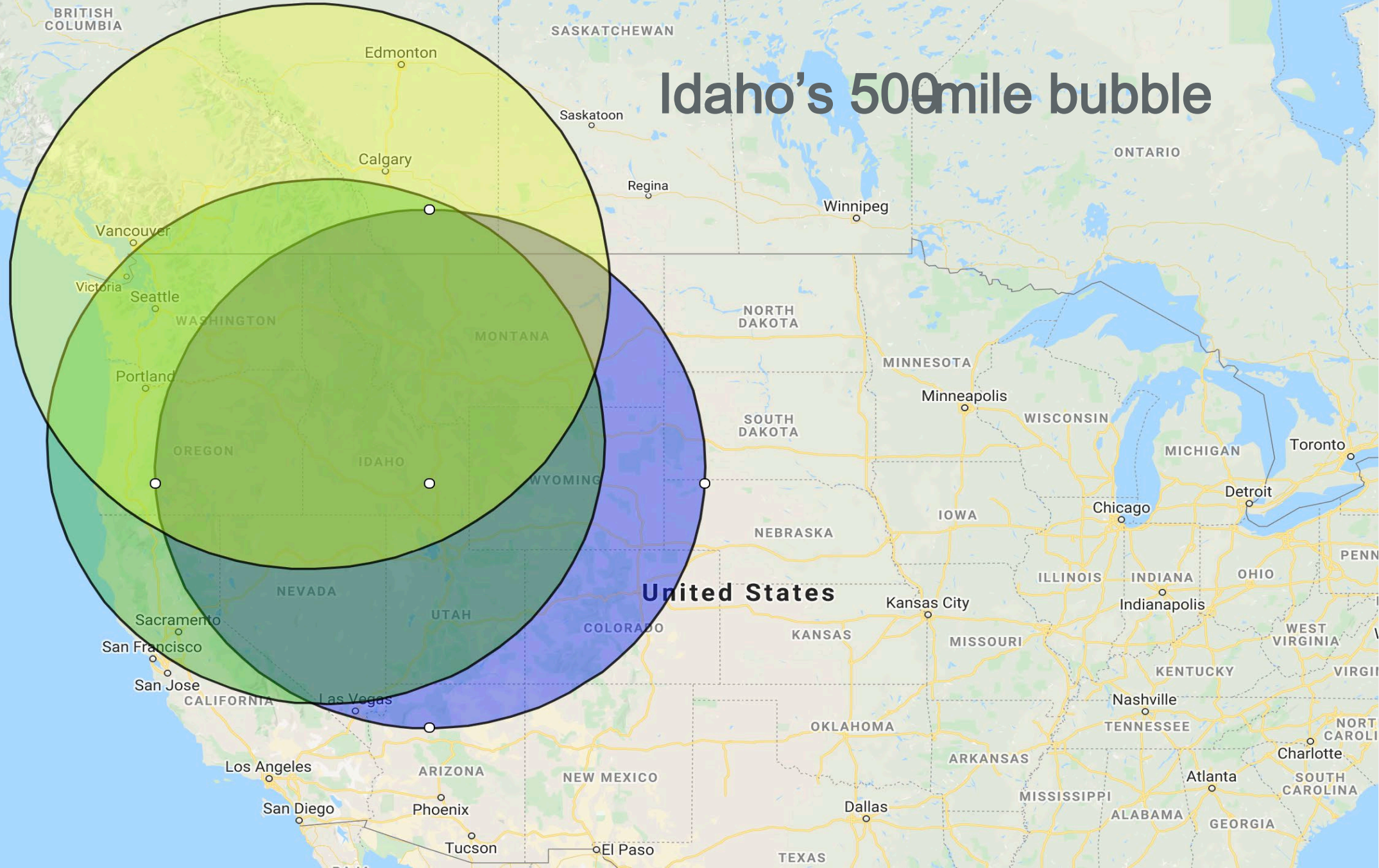




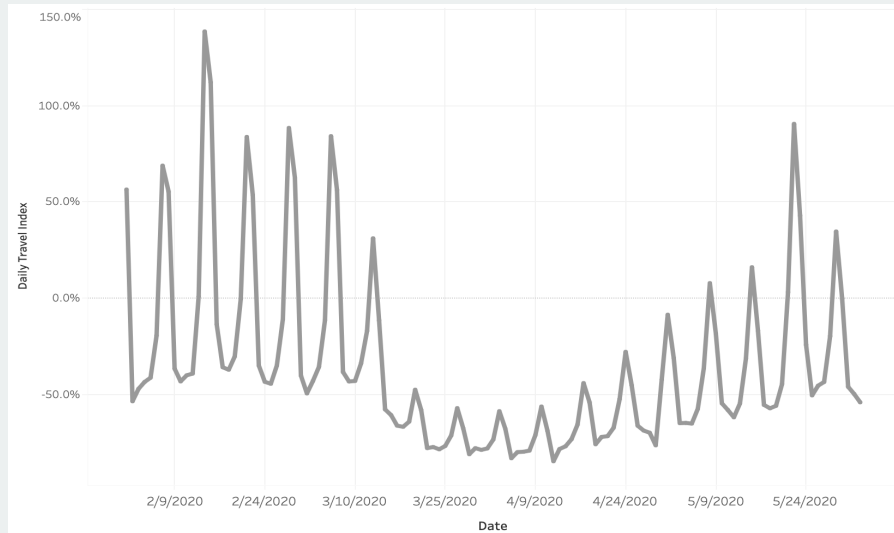
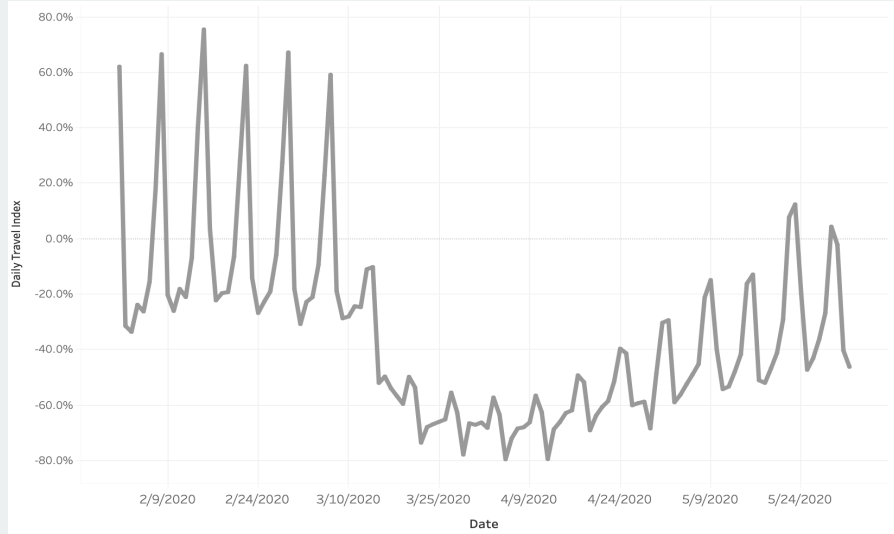
Daily Travel Index: Idaho Regional Insights



Idaho's 500-mile bubble



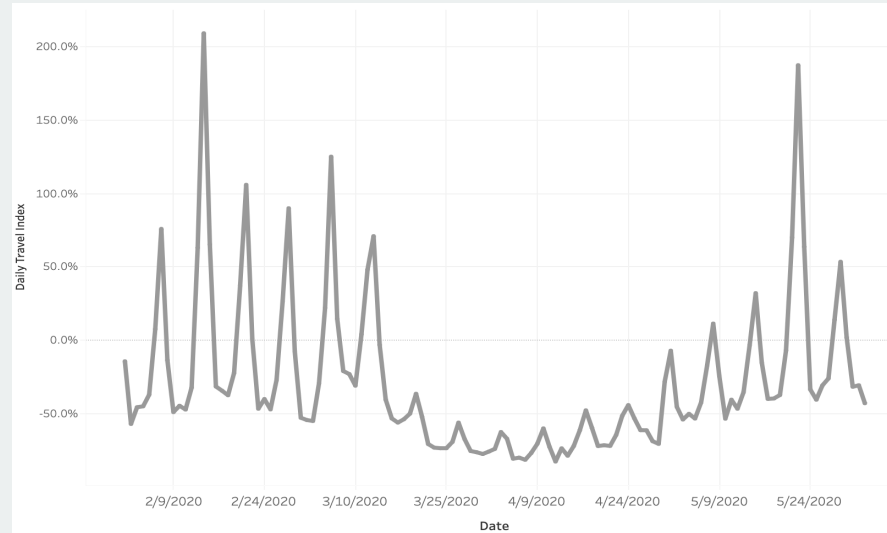
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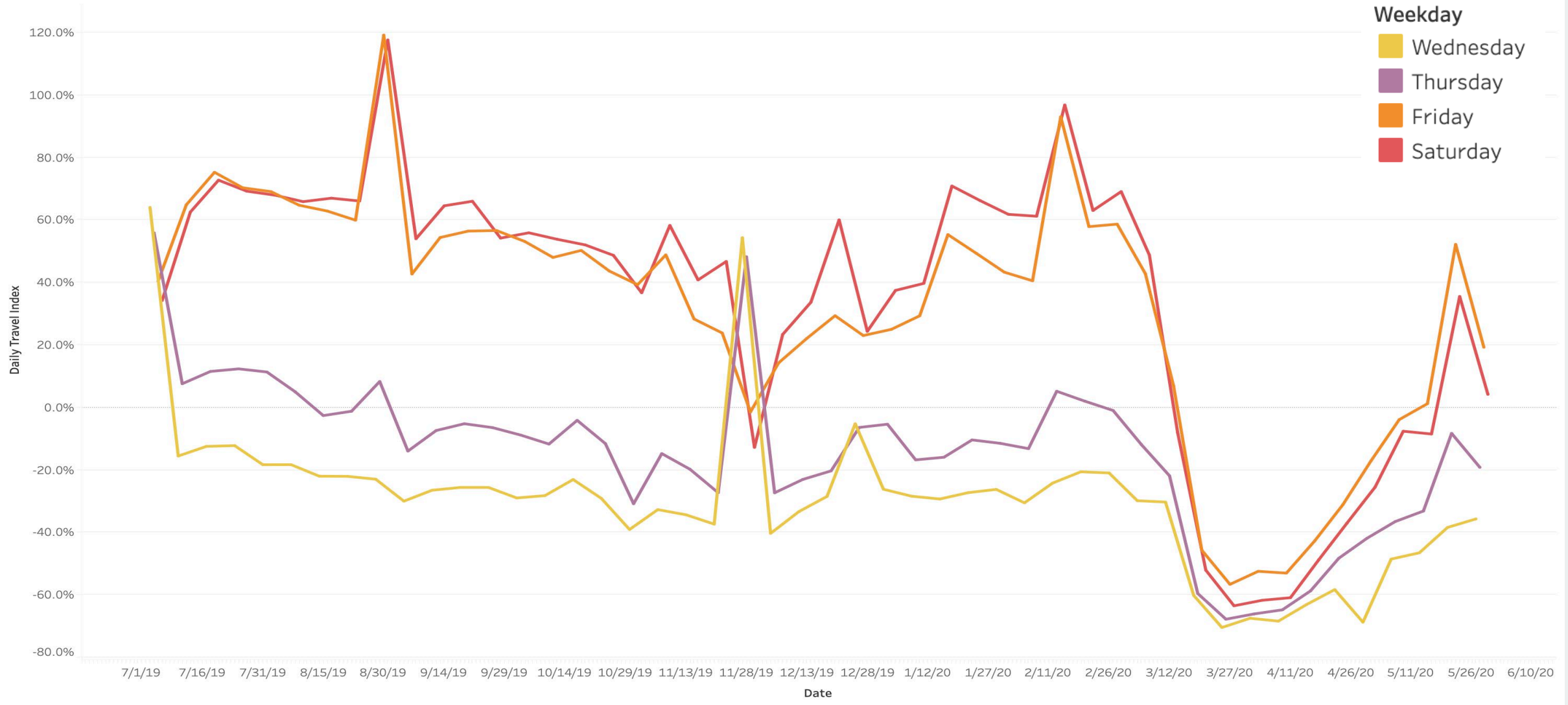
Potential Idaho Drive Markets
(CA, WA, OR, MT, NV, UT, AZ, CO, ND, SD, NE)



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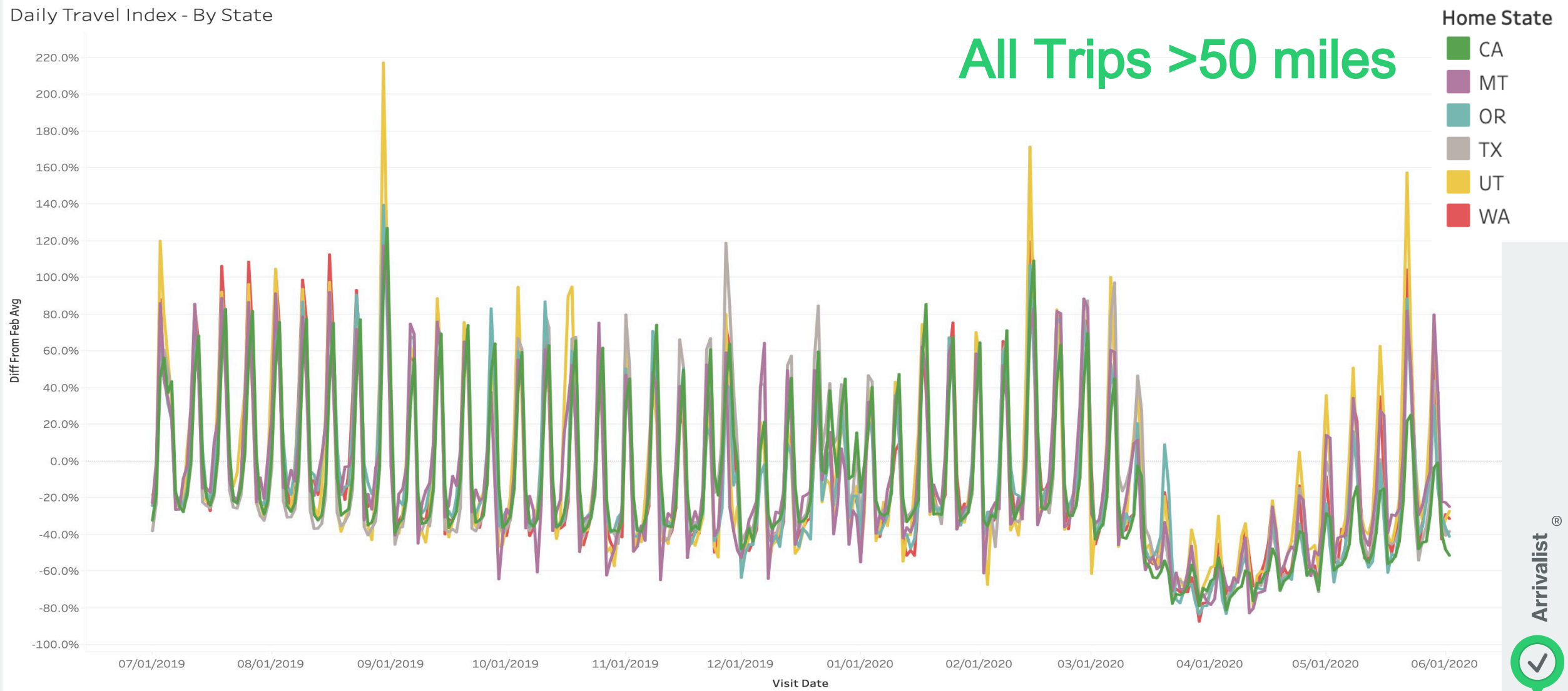
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Daily Travel Index By Day of Week



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Daily Travel Index - By State





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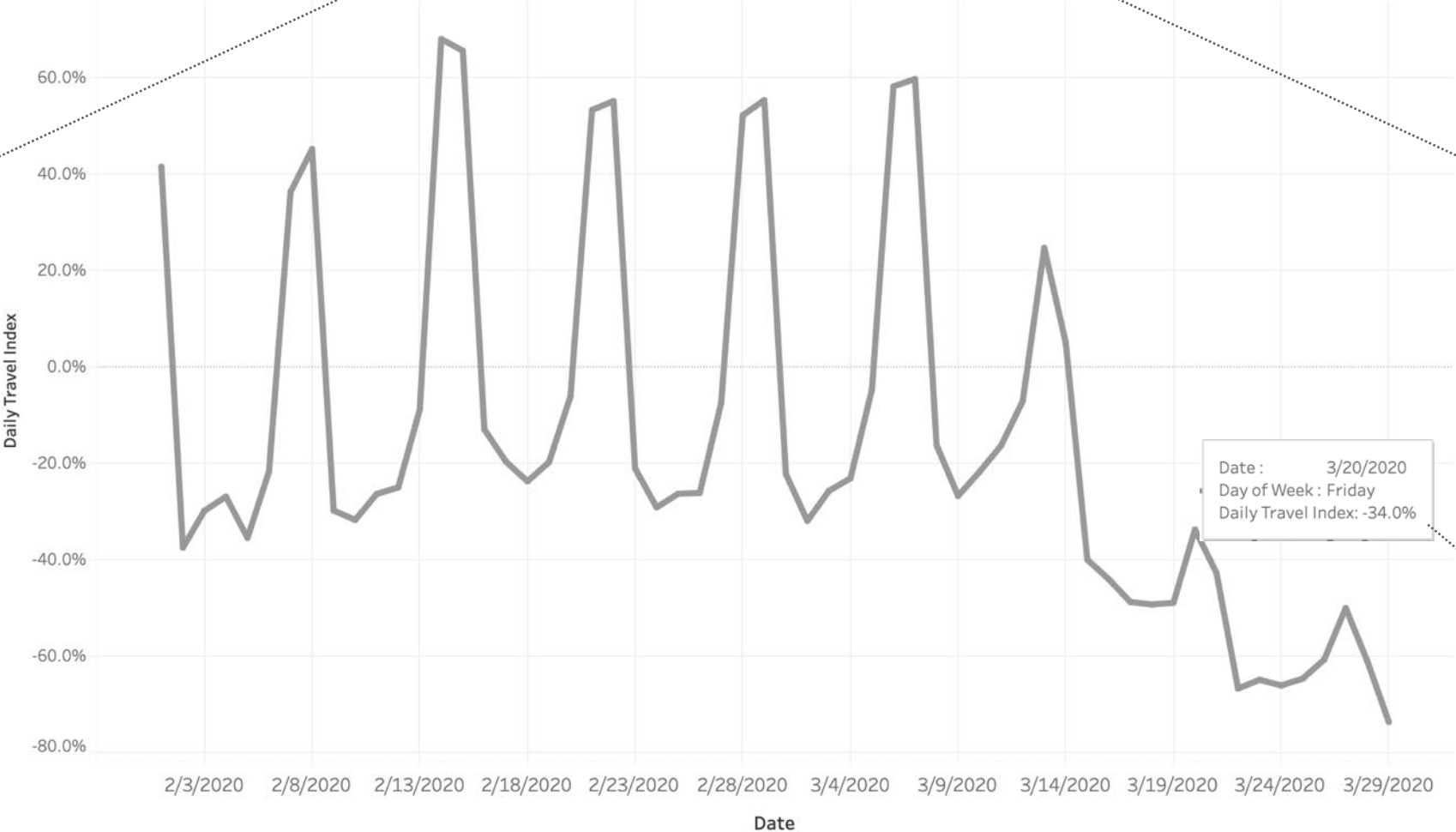
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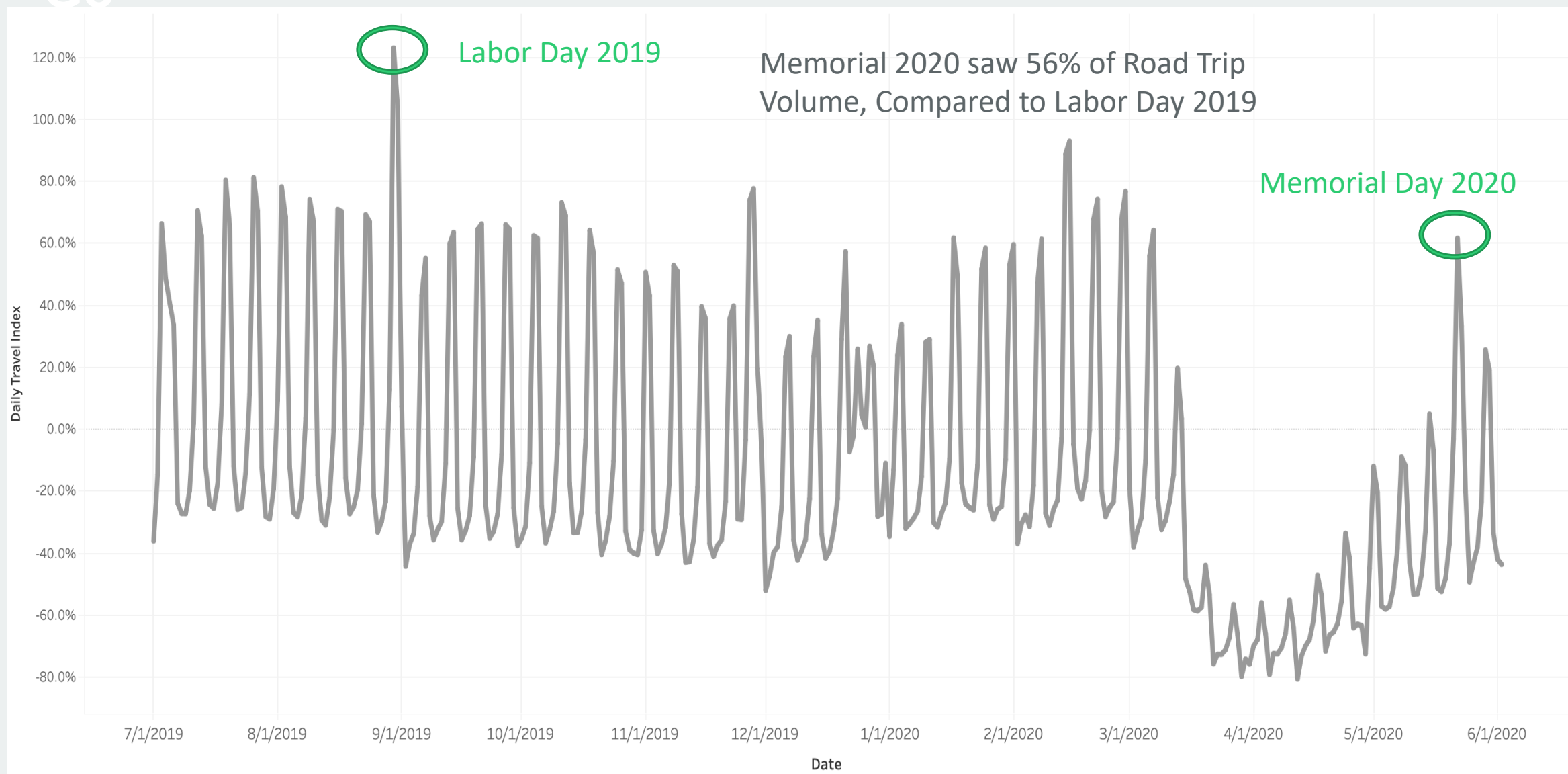
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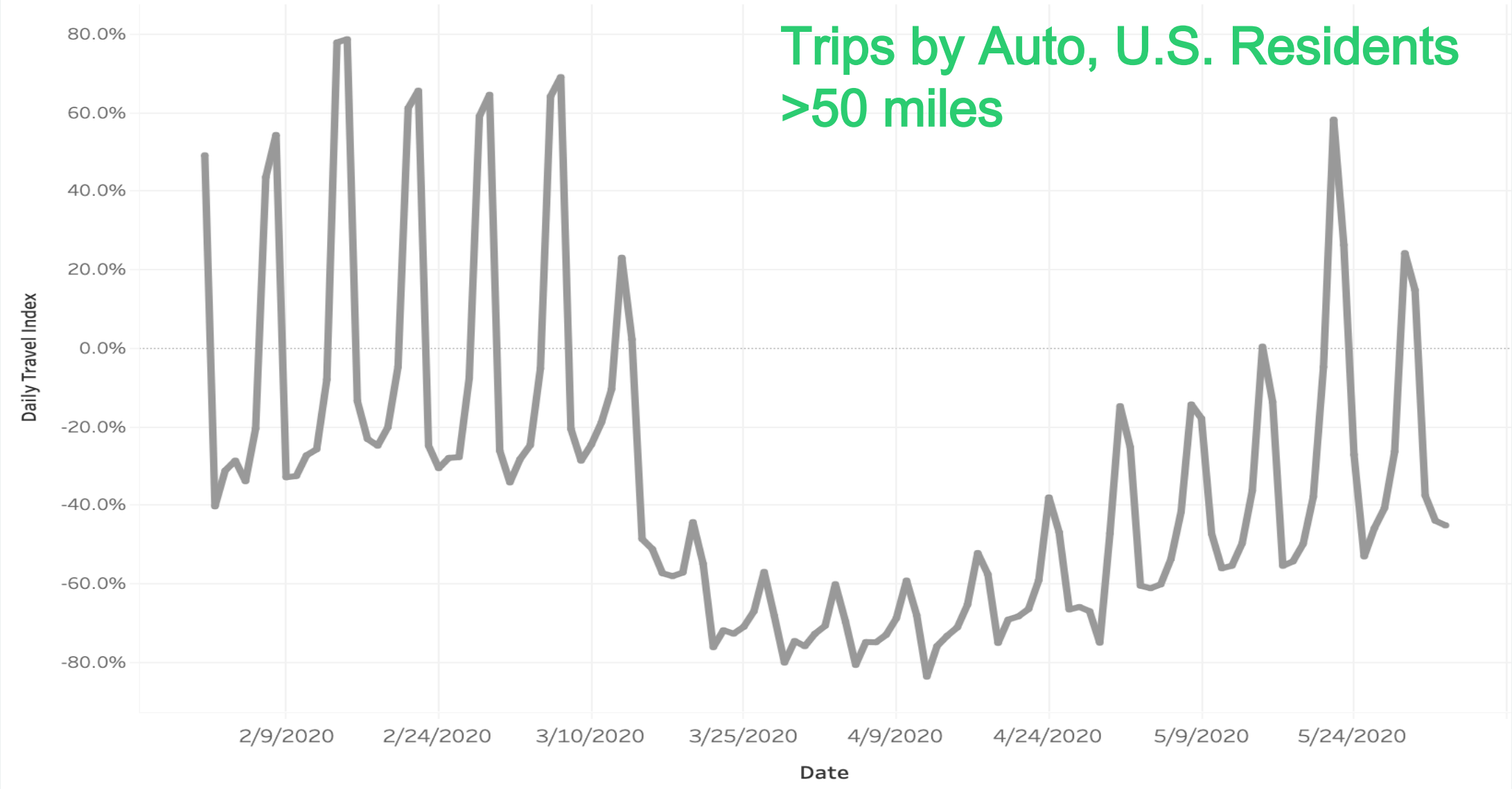
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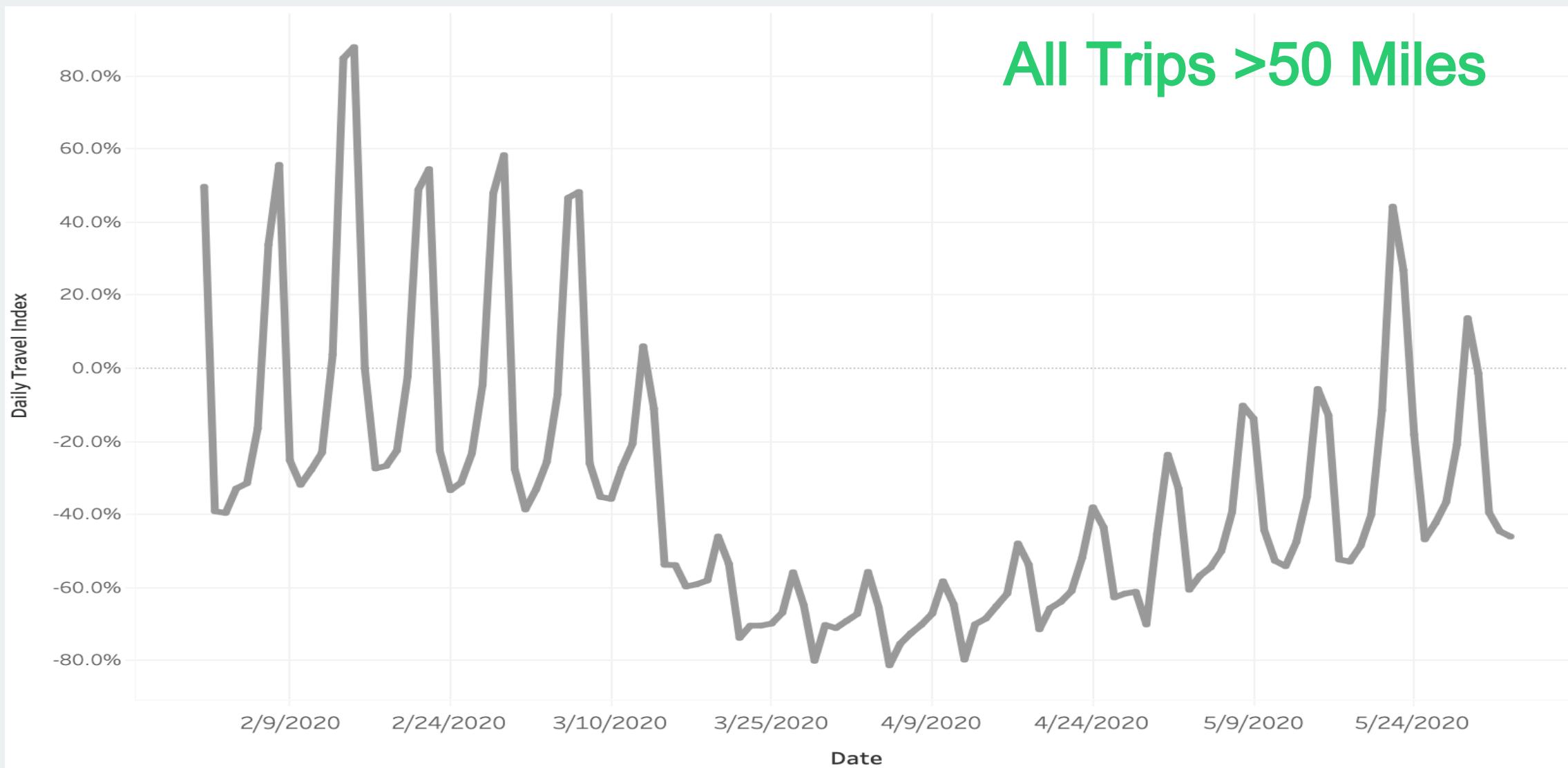
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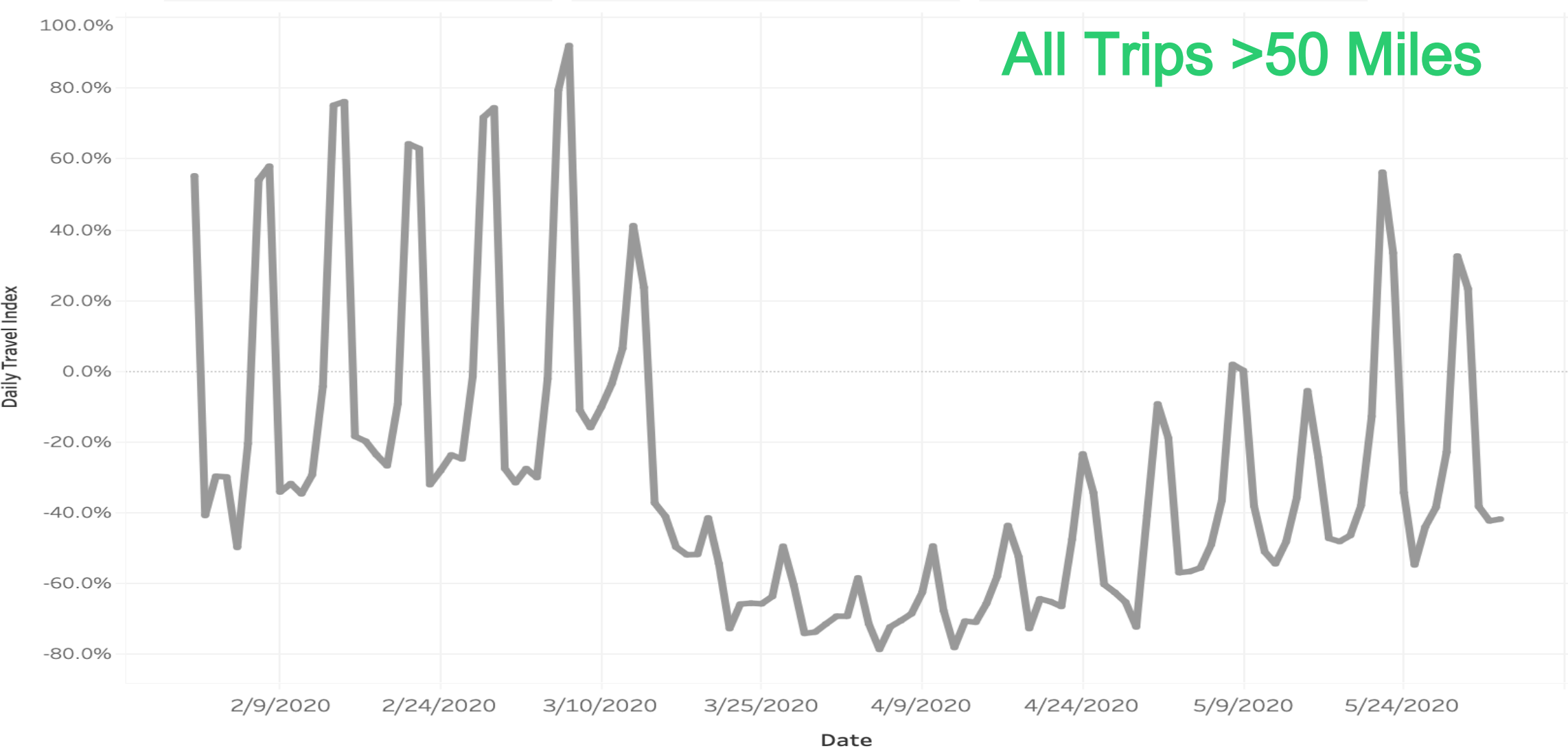
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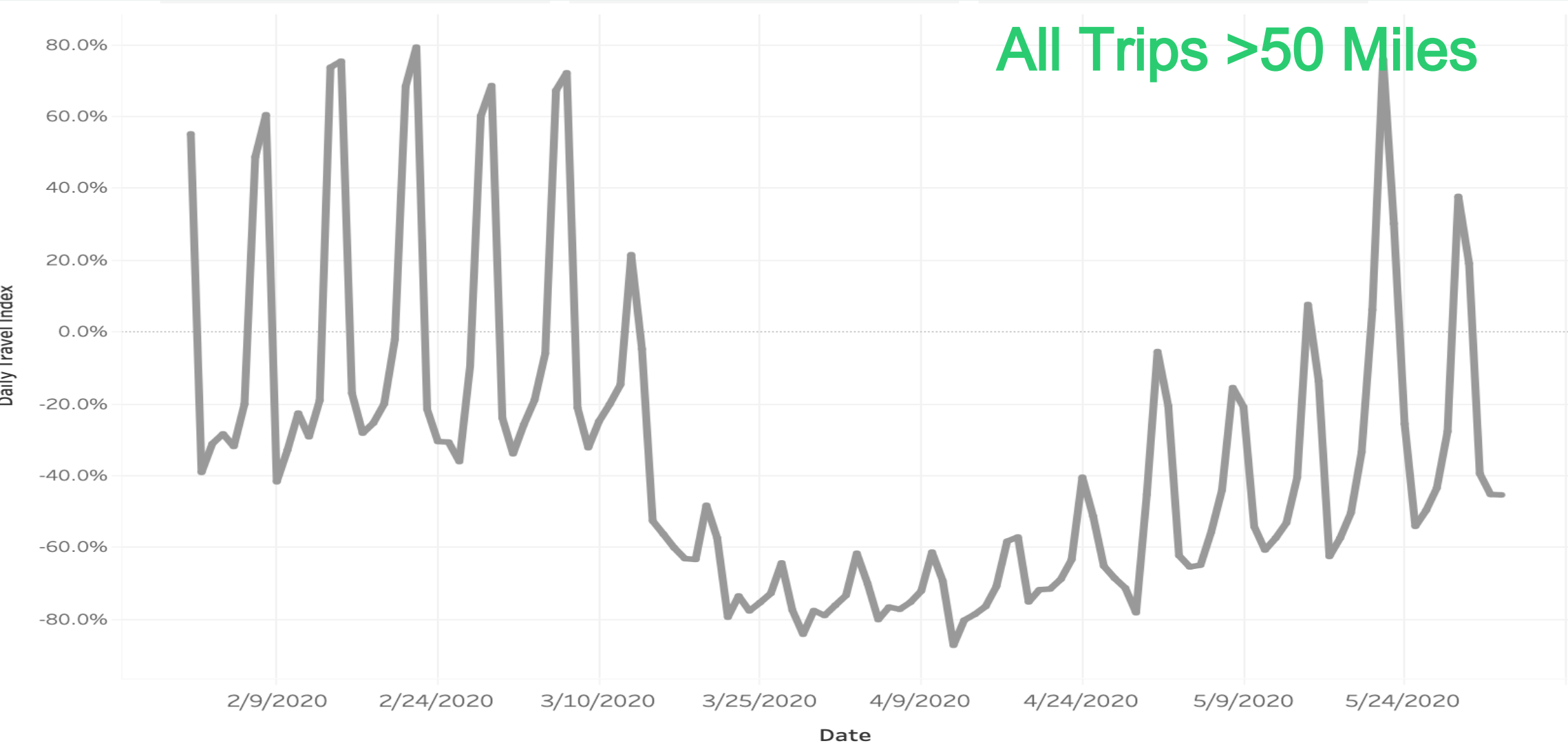


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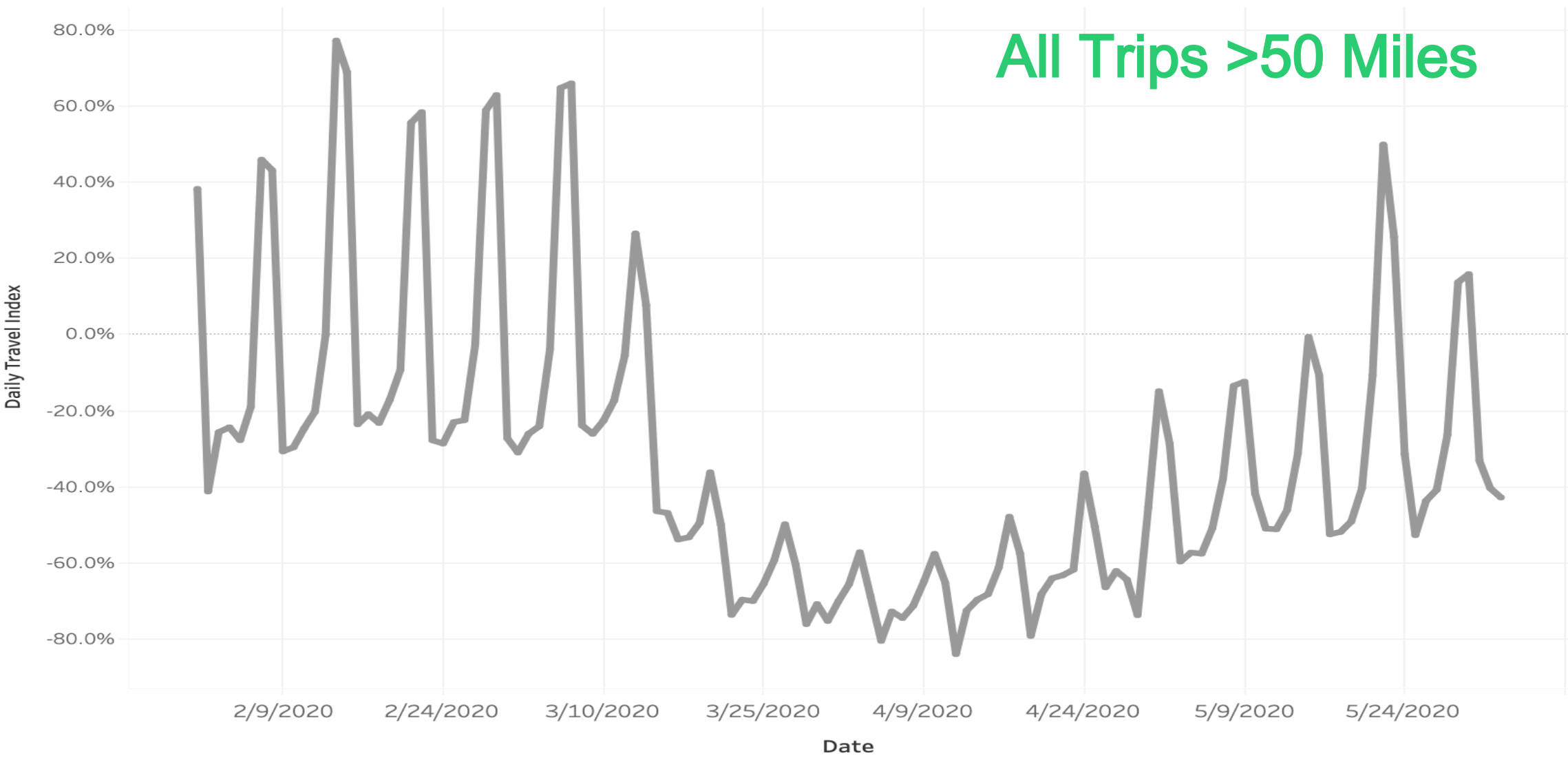


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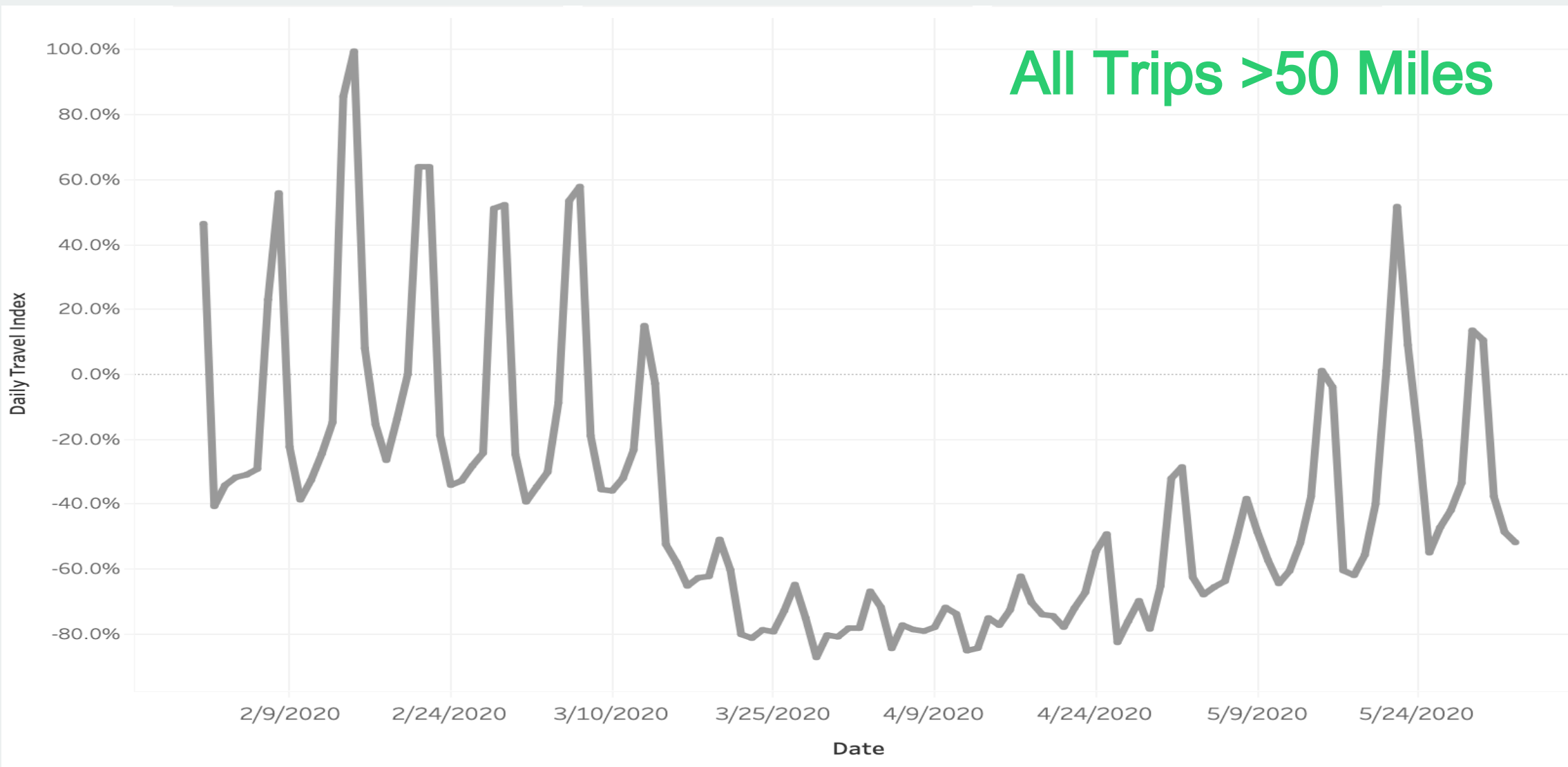


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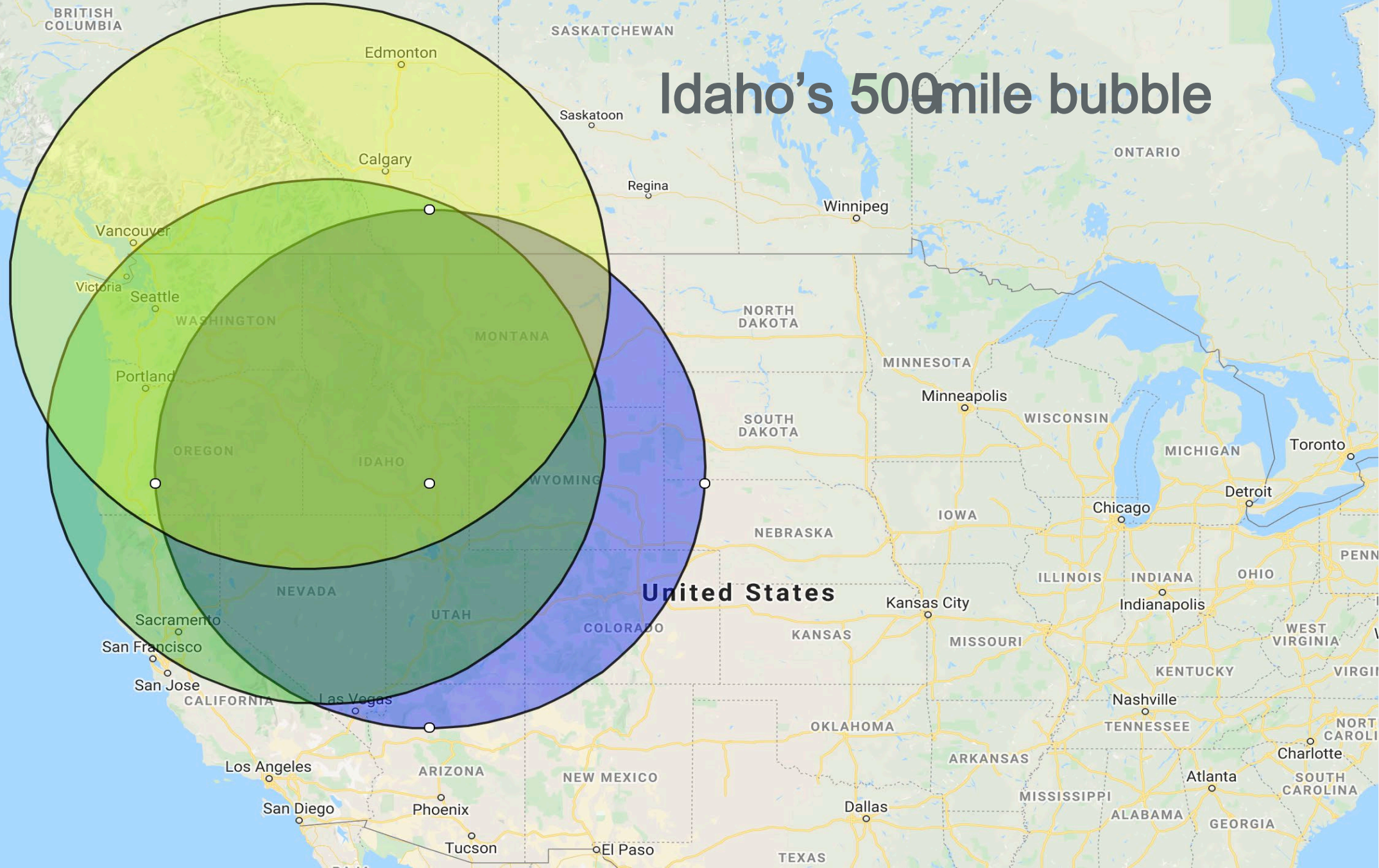




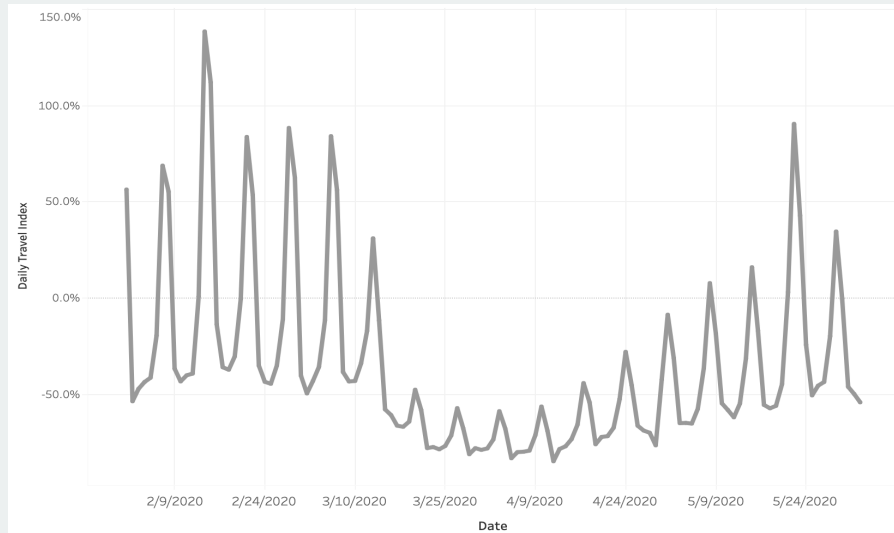
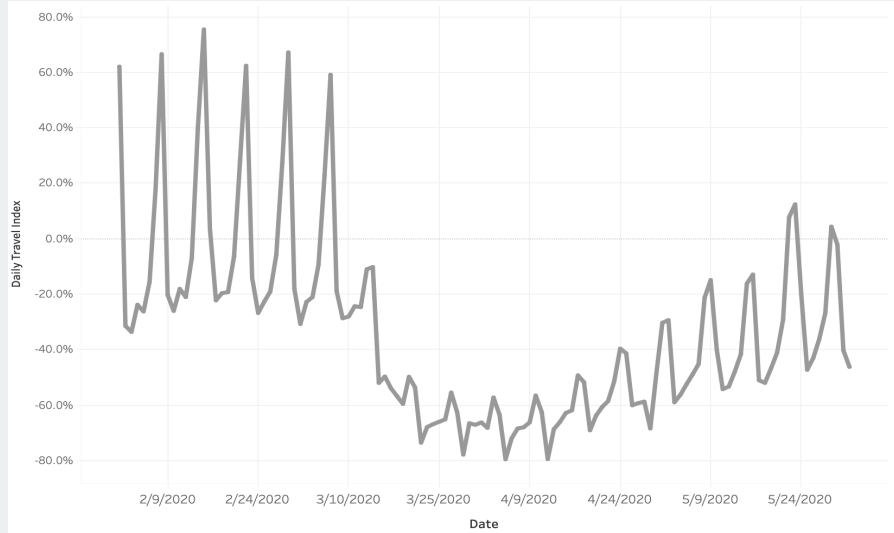
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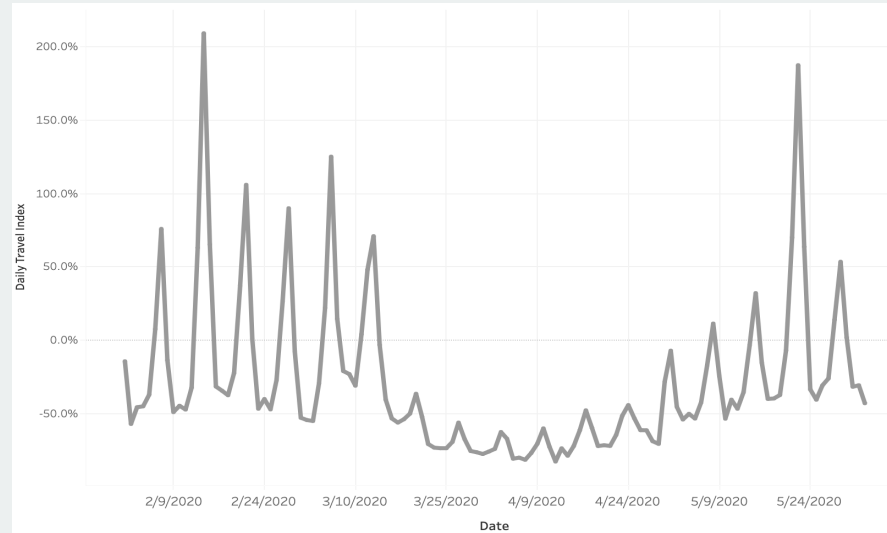
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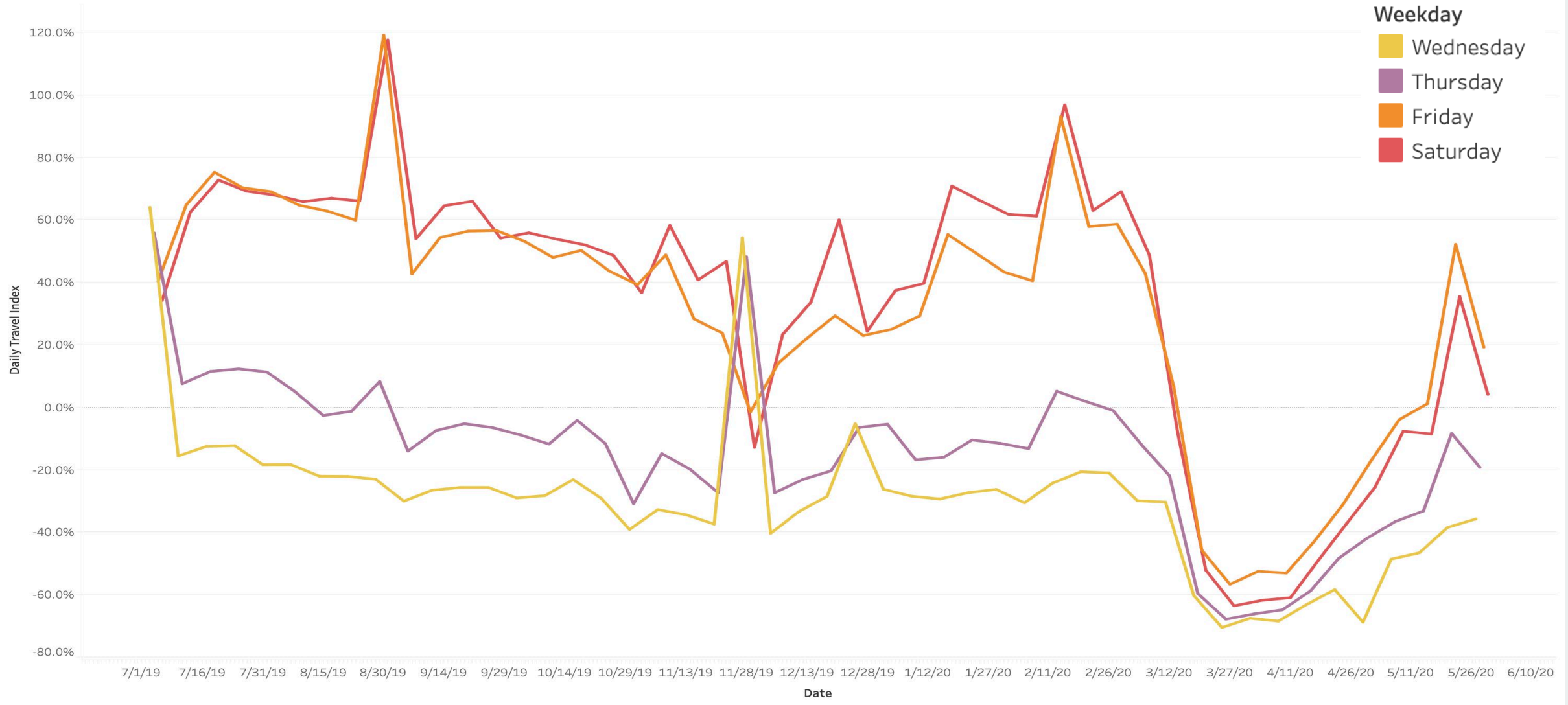
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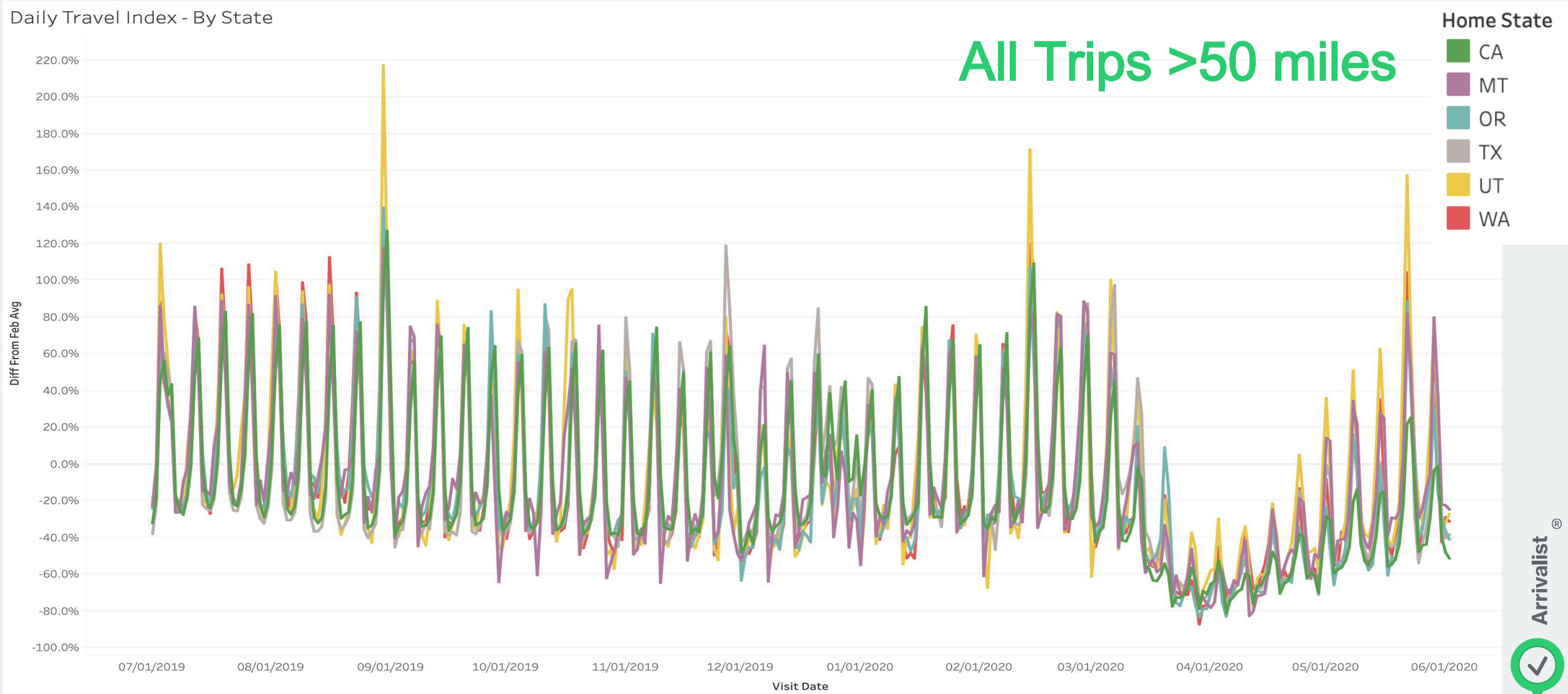
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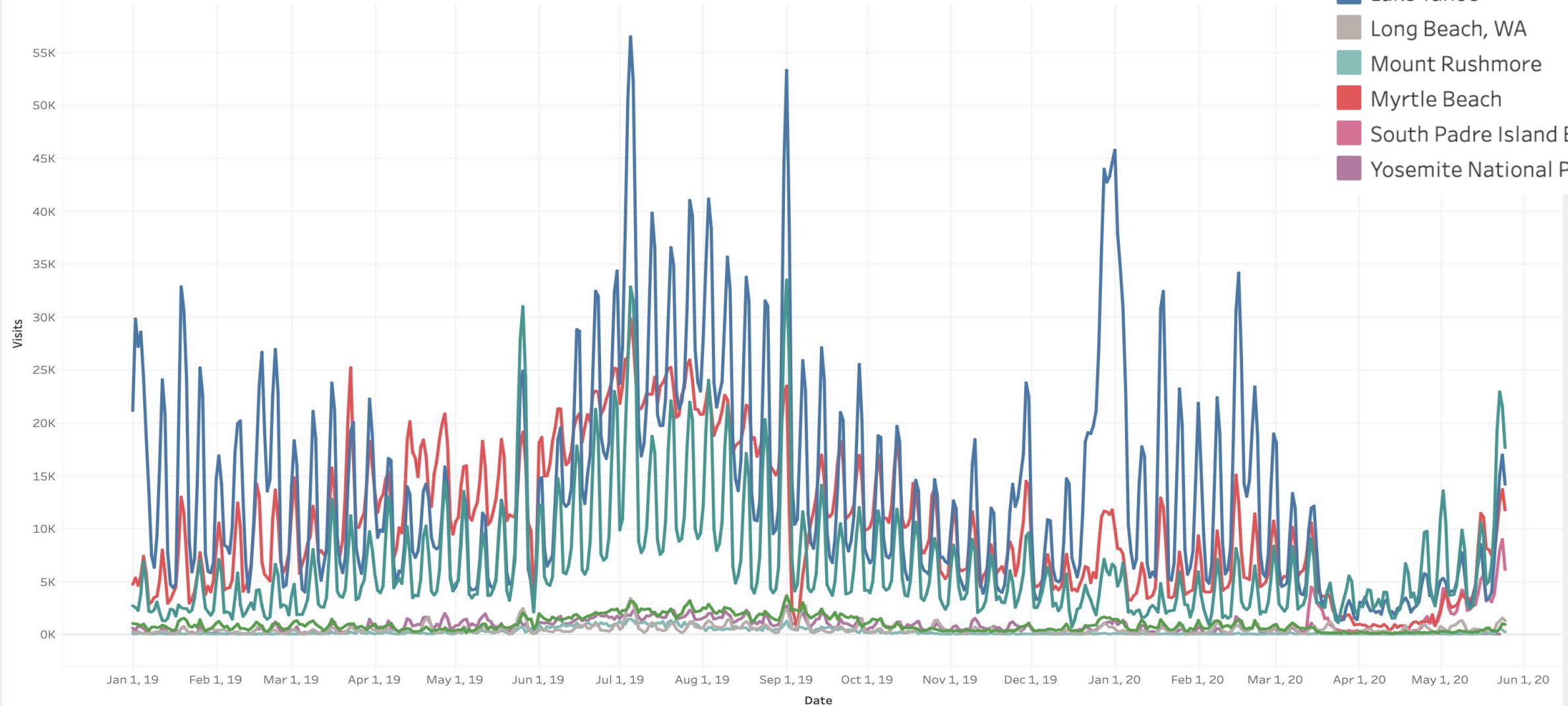
Daily Travel Index - By State



Drive Market Analysis: Trips to Outdoor Experiences

- Grand Teton National ...
- Lake of the Ozarks St...
- Lake Tahoe
- Long Beach, WA
- Mount Rushmore
- Myrtle Beach
- South Padre Island Be...
- Yosemite National Park

Daily Drive Market Visits



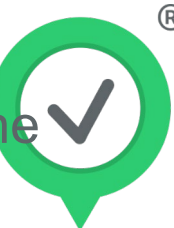


Takeaways



Takeaways

- ① Idaho and the surrounding region is slightly above the national curve for drive market activity, especially in the 100-250+ mile range. This makes regional drive markets more important than ever.
- ② Defining your drive markets and their distance from you--is critical. Monitor trip trends for key states within the mileage bands that are applicable to Idaho.
- ③ Travel is rebounding, but slowly. Travel research largely reflects a desire by consumers this summer for outdoor and rural experiences. Additionally, with more consumers taking trips by car, there is a greater opportunity for a wide spread of visitation across many communities within the state.



Media Patterns in an Acute Crisis

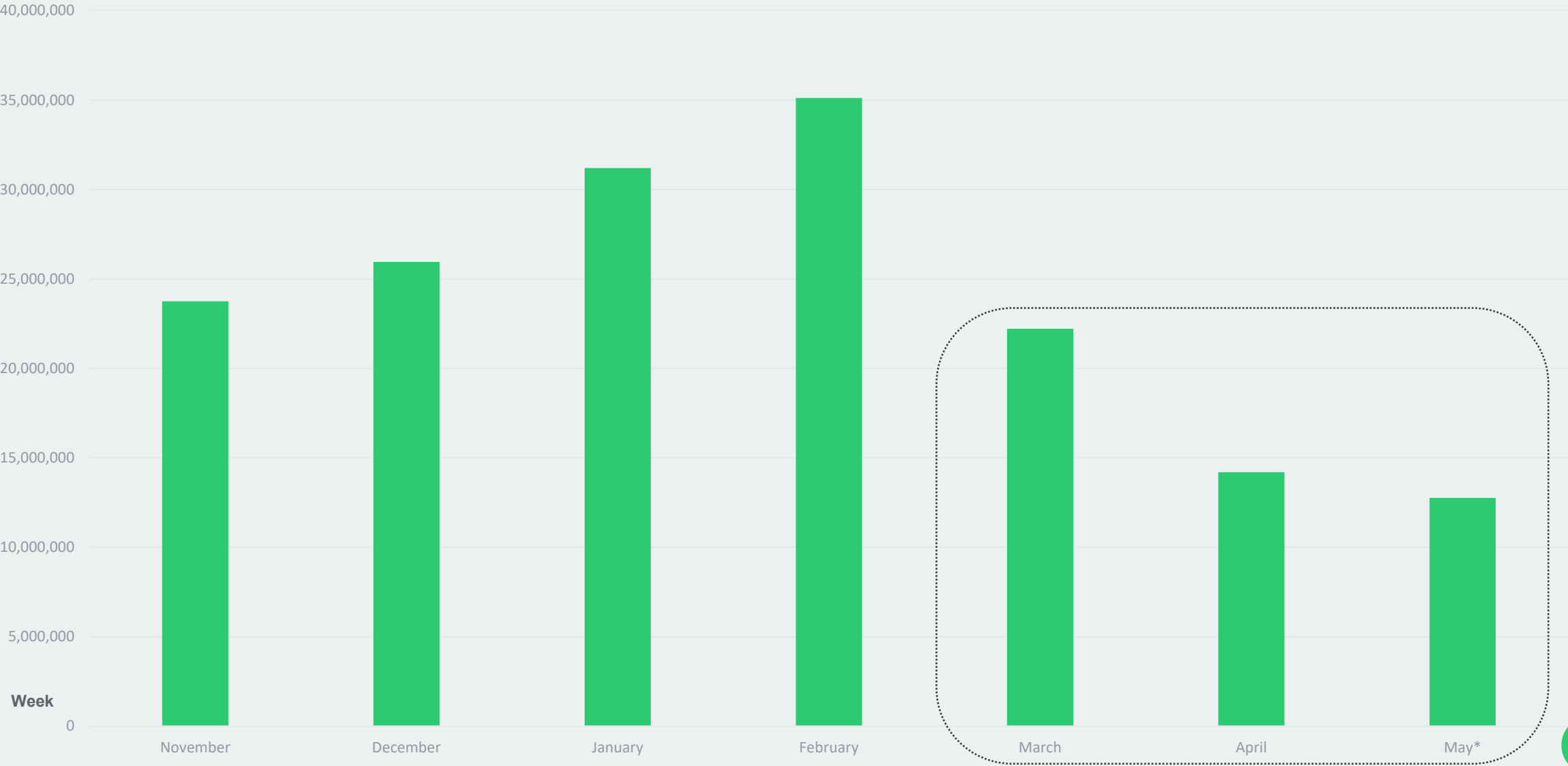
Indicators

Arrivalist®

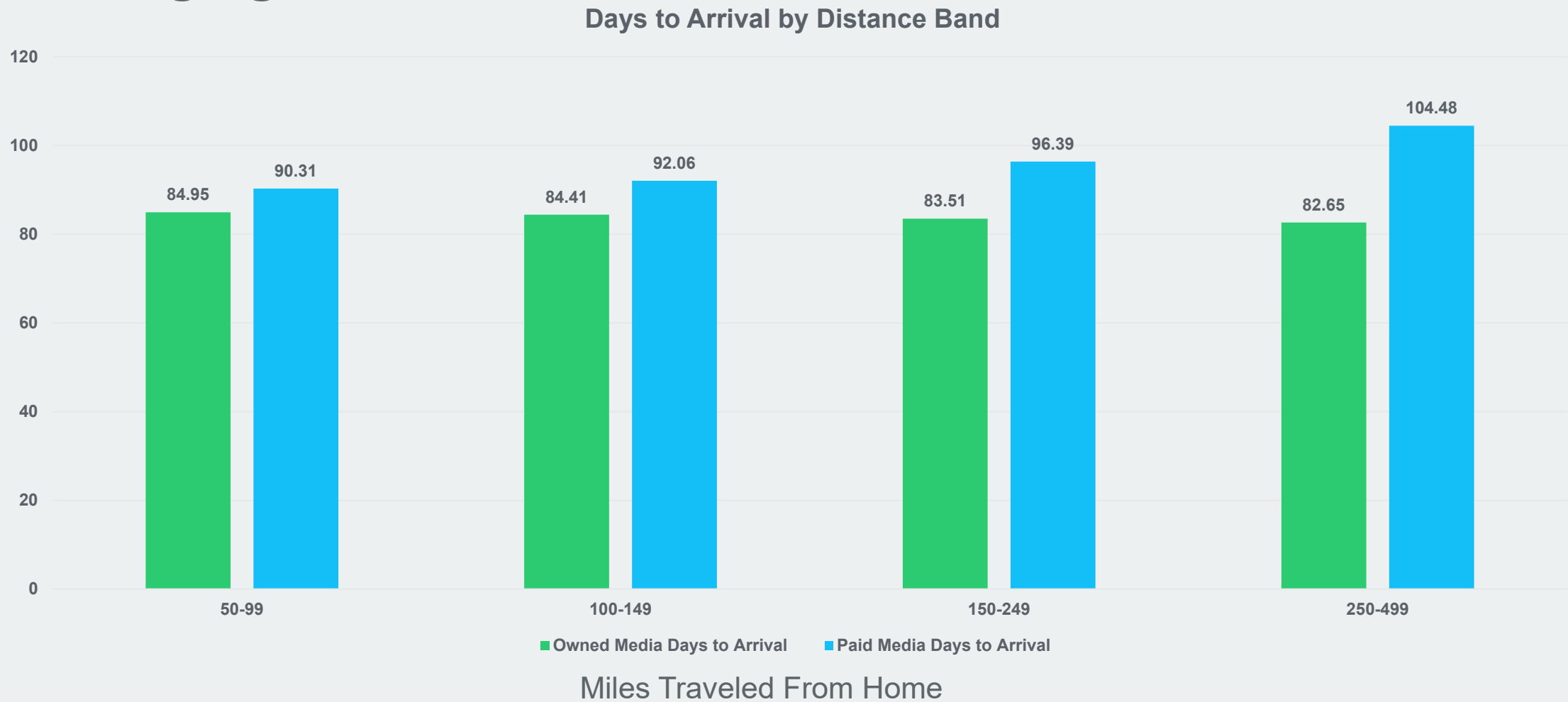


Monitor your website traffic as an early indicator of intent to travel

Shown: Aggregate of all Arrivalist Attribution Clients



Once consumers visit owned media or are exposure to paid media, how long before they arrive? How might this influence my messaging?



2019 Values for all attribution clients.





Idaho: Take Action Using Your Updated Toolkit

- 1 Understand the macro travel patterns and how behaviors could change
- 2 Keep a pulse on market readiness and mobility with the US Daily Travel Index for day by day signs of recovery
- 3 Use media indicators to help prepare for arrivals and put the right message in market at the right time.
- 4 Learn from your neighbors.



Adapting to the environment. Meeting your needs.

Arrivalist is expediting the roll-out of A4 to adapt to changing market conditions.

Key offerings include:

- Daily Travel Index 2.0 – Customized to your destination
- Origin Markets by Zip Code – Greater fidelity for visitor analysis
- Enhanced Reporting and Download Capabilities
- Audience Demographics for Visitation Data

New Capabilities for the “New Normal”:

- Measure repeat visitation from the drive markets you rely on
- Game-changing new insights to measure the impact of your DMO



Arrivalist

Q&A + Follow-Ups

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Nevo Waintraub
Sr. Business Development
Director

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