

# HOMES, GERMS, AND WHEELS

- How COVID19 Changed Travel to NC
- Jumpstarted the Shared Economy
- And how you can benefit from the new travel normal

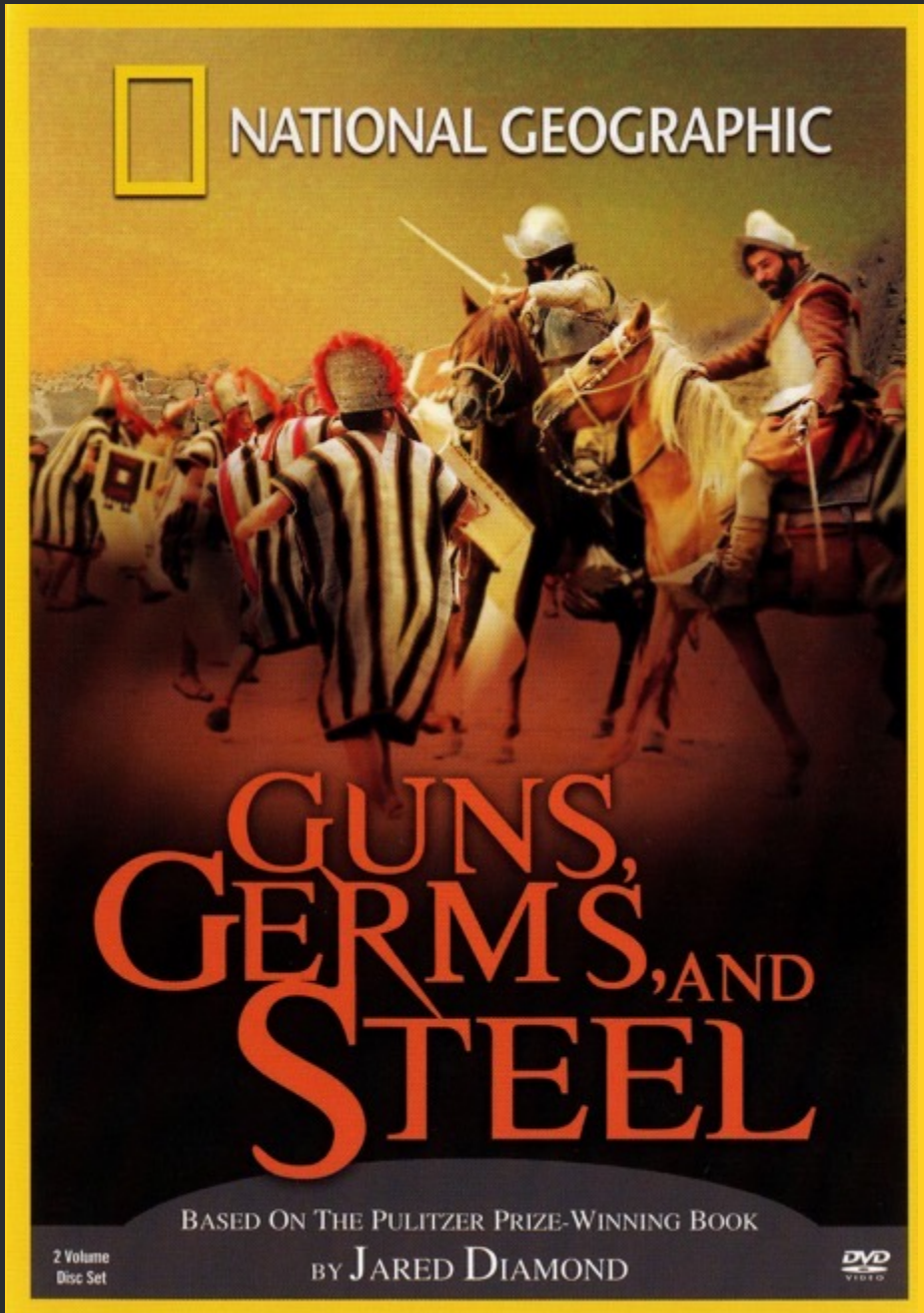
MEASURING THE WAY WE MOVE



ARRIVALIST A 4

Arrivalist





**Momentous Moments of Change**

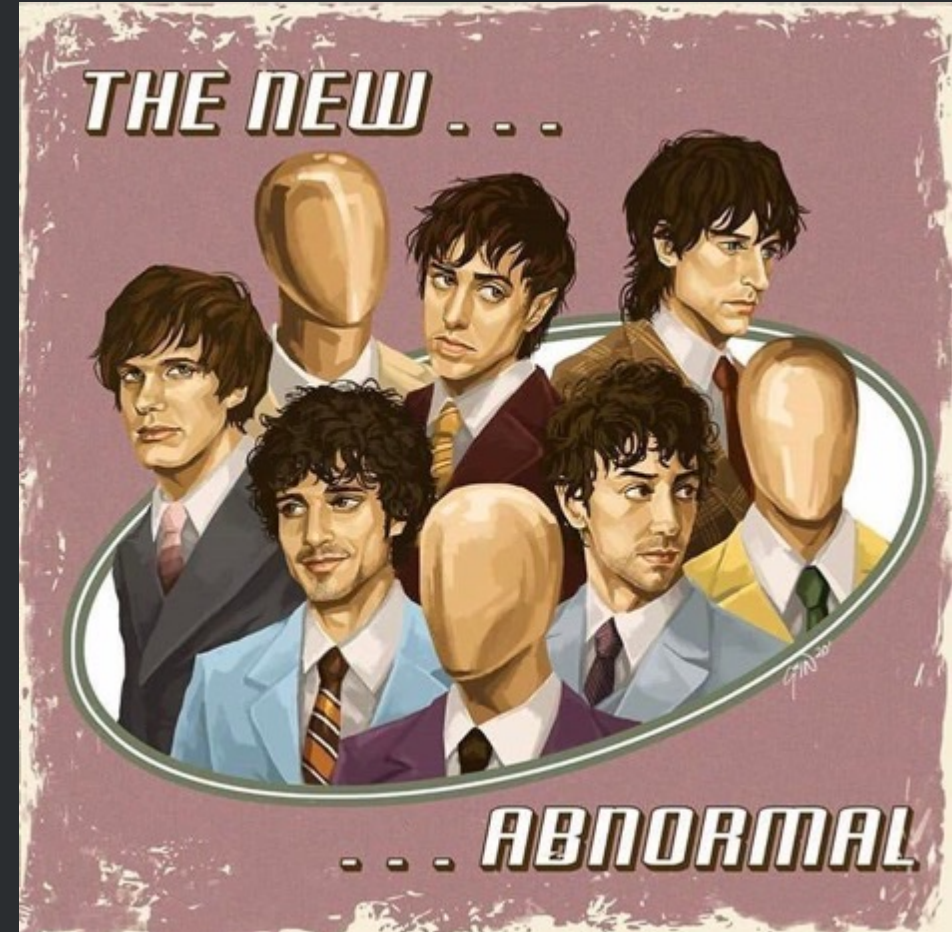
**Happen when emerging technology collides**

**With life-changing health issues.**



# What Does this Mean for Me?

- North Carolina Travelers:
  1. Coming from different origin markets and going to different places
  2. Driving In Different Cars
  3. And staying in Different Places



# What's Disrupting Travel? Homes, Germs and Wheels



## HOMES

Vacation Rentals  
disrupting  
Overnights



## GERMS

Are changing  
where we go



## WHEELS

Electric Vehicles  
are changing  
how we get  
there



# Homes, Germs and Wheels

How Have Homes Changed Travel to North Carolina?





**VACATION  
RENTALS**

**VS.**

**HOTELS**



**VACATION RENTALS**



**Hotel Accommodations**

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Vacation Rentals Share of the **Lodging Market**

# Movement is the Glue that Ties the Travel Experience Together



We see the consumer through the spending events



We see the consumer through their survey



Location Data is the glue that ties the entire consumer experience together

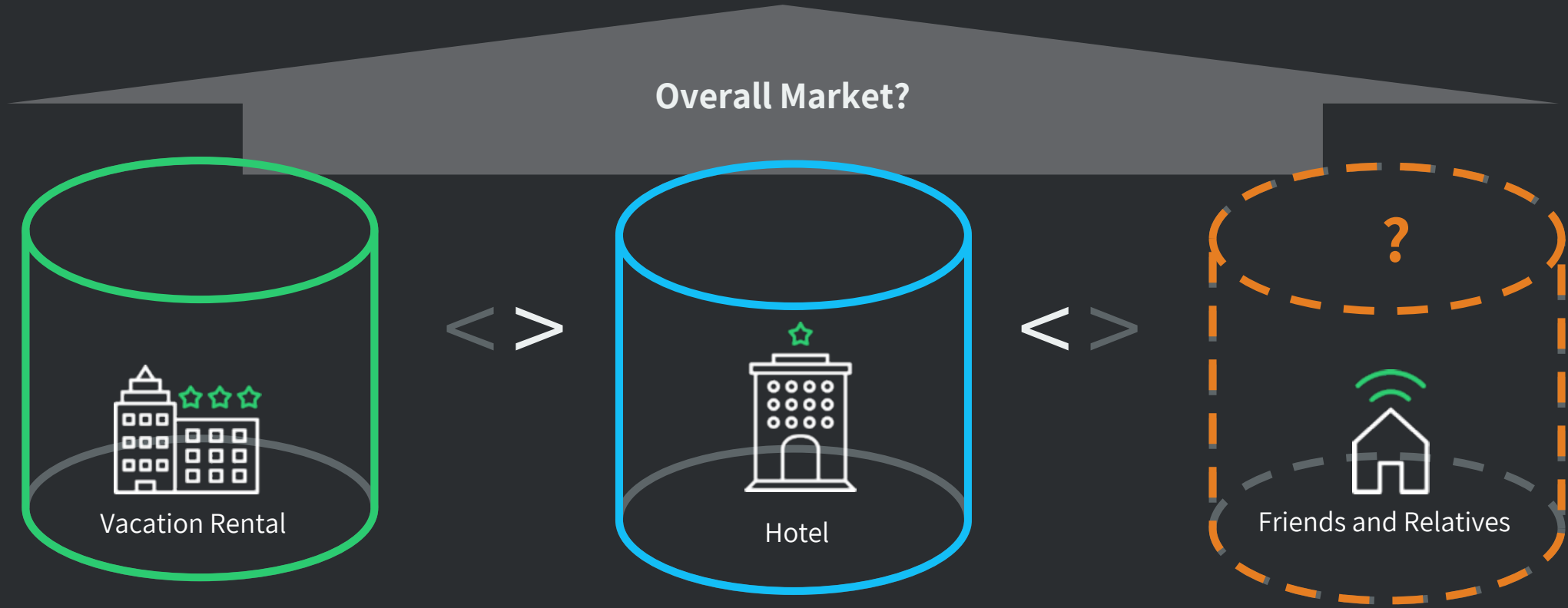


Length of Stay



Transformative and Foundational

# All Lodging Data Lives in Silos



- But how is the total overnight market shifting?
- Which Sectors is Gaining or Losing Share to Others?
- **Where are the new Overnight Revenue Opportunities?**

*Patent Pending*





A high-angle, top-down photograph of a man and a woman lying in bed at night. They are positioned back-to-back, facing opposite ends of the bed. The man, on the left, is wearing a white t-shirt and has his hands clasped near his face. The woman, on the right, is wearing a white tank top and is holding a smartphone in her right hand, looking at the screen. The bed is covered with a white sheet and has two white pillows. To the right of the bed, a bedside table holds a white lamp and the smartphone. The room is dimly lit, with the primary light source being the phone's screen and the lamp. The overall color palette is dark with white highlights from the bedding and clothing.

Phones stay  
overnight..  
**everywhere.**



# Phones Stay Overnight Everywhere



- See overall market shifts
- Understand share shifts
- Find emerging revenue opportunities

*Patent Pending*



# What's the Total Overnight Market Look like?

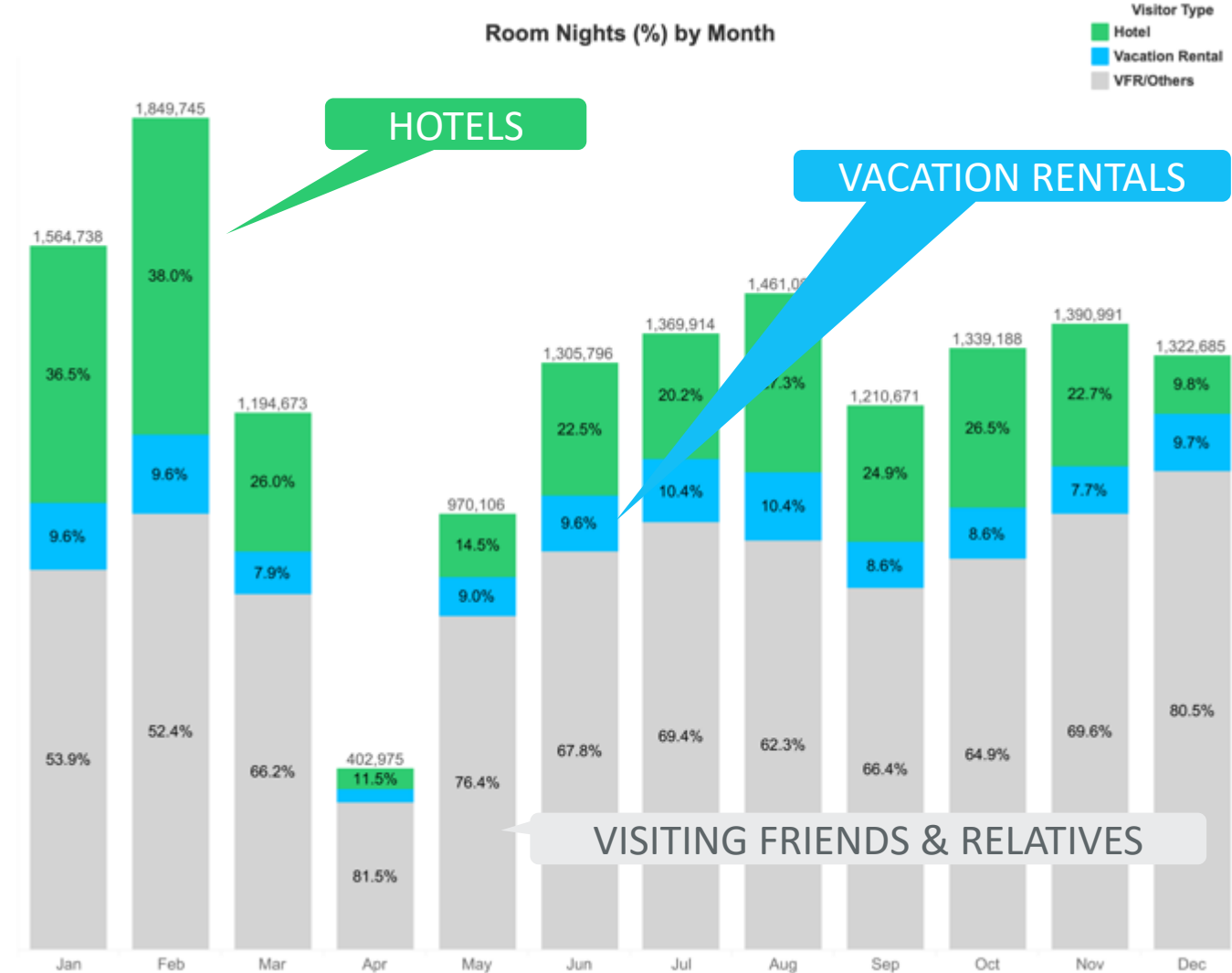
**Total Room Nights**  
**15,382,563**

**Hotel**  
**25.0%**

**Vacation Rental**  
**9.2%**

**VFR/Others**  
**65.8%**

Rank	DMA	Room Nights	Hotel	Vacation Rental	VFR/Others
1	Houston	3,853,182	23.4%	9.6%	67.0%
2	Dallas/Fort Worth	2,756,623	27.8%	9.8%	62.4%
3	San Antonio	1,635,137	15.9%	7.1%	77.0%
4	Waco/Temple/Bryan	908,264	10.9%	7.6%	81.4%
5	Harlingen/Weslaco/B...	498,787	30.6%	8.8%	60.6%
6	Corpus Christi	360,898	19.8%	6.4%	73.8%
7	Los Angeles	313,298	30.6%	12.5%	56.9%
8	Tyler/Longview/Lufki...	228,911	27.0%	7.4%	65.6%
9	San Francisco/Oakland/San Jose	182,052	29.9%	10.5%	59.6%
10	Beaumont/Port Arthur	208,804	35.0%	8.0%	57.0%
11	Chicago	163,442	31.0%	12.2%	56.8%
12	El Paso	165,941	32.8%	8.8%	58.4%
13	New York	145,493	30.9%	16.7%	52.4%
14	Odessa/Midland	150,583	29.3%	5.0%	65.7%
15	Denver	140,583	25.7%	10.2%	64.0%
16	Lubbock	120,802	29.0%	5.0%	66.1%
17	Austin-Tx	125,613	7.8%	4.7%	87.5%
18	Abilene/Sweetwater	120,371	27.1%	6.0%	66.9%



*Patent Pending*



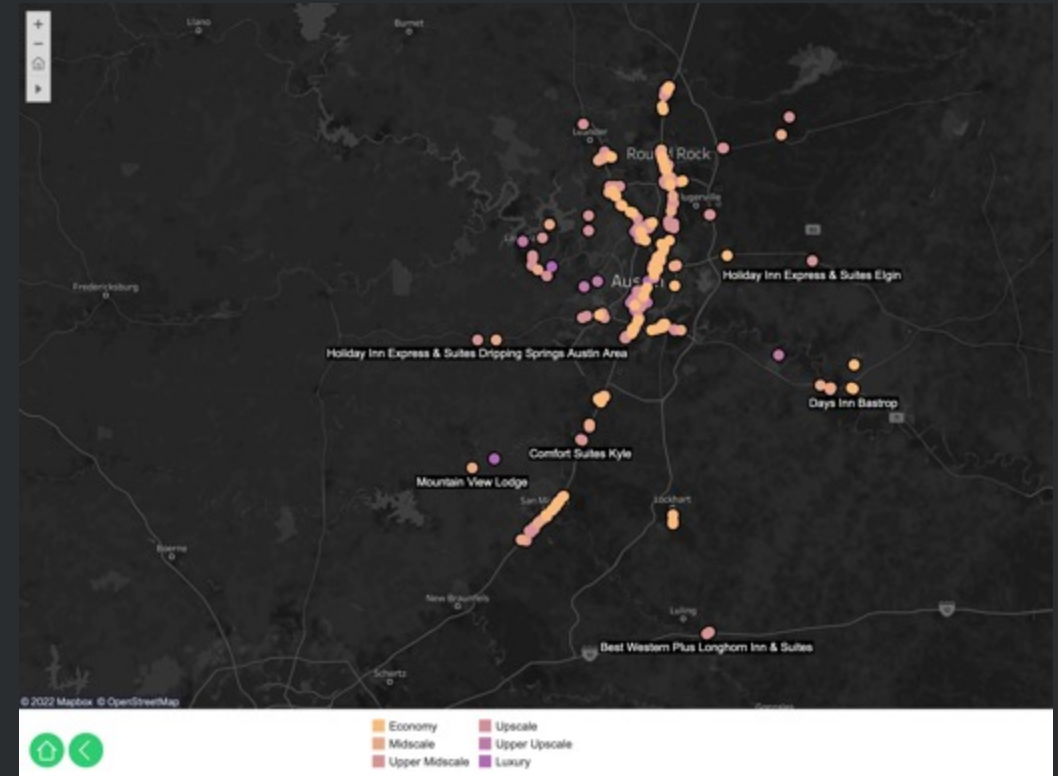
# Austin, TX – Who's Winning - Hotels or Vacation Rentals?

## Case Study Setup:

- Monitor overnights visitors to Austin and determine their lodging type.

## Case Study Objective:

- How has the pandemic impacted visitor's lodging preferences in Austin?



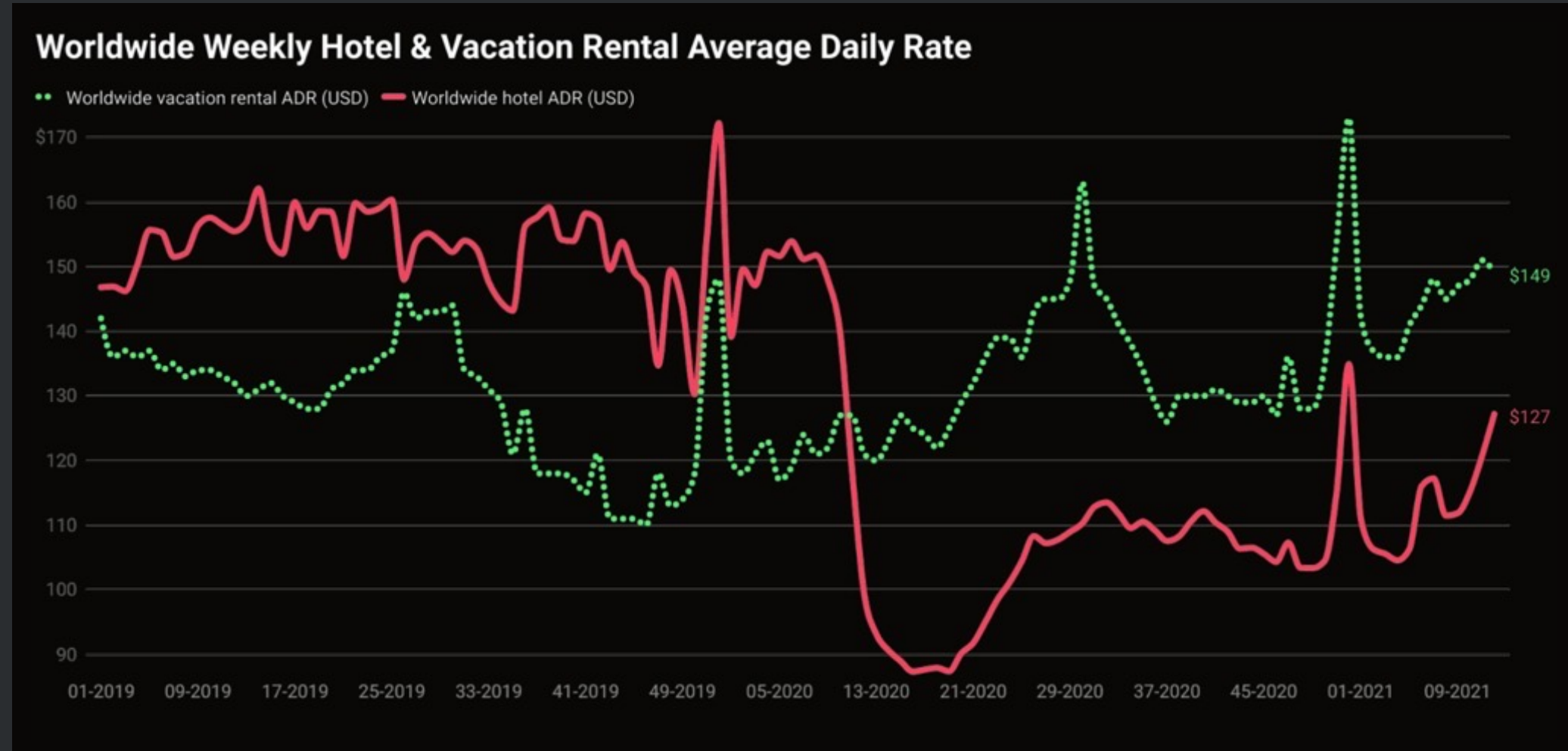
Patent Pending





## PRICING

# Vacation Rental Rental ADR Flipped Hotel during COVID19



Transparent & Amadeus Hotel & Vacation Rental COVID-19 Recovery



# Introducing Arrivalist Lodging Economics Dashboard™



Patent Pending



# Homes, Germs and Wheels

- How have Germs Changed Travel to North Carolina?



## Challenge Question

**What percent of out-of-state NC travelers arrive by car?**

- A) 80%
- B) 70%
- C) 45%
- D) 95%





**Arrivalist Clients...**

**81%**

**Of Arrivalist Clients had a change in one of their Top  
3 Origin markets, going into 2021**



# Germes: How North Carolina Road Trip Origins have Changed

## TOP FIVE IN 2019

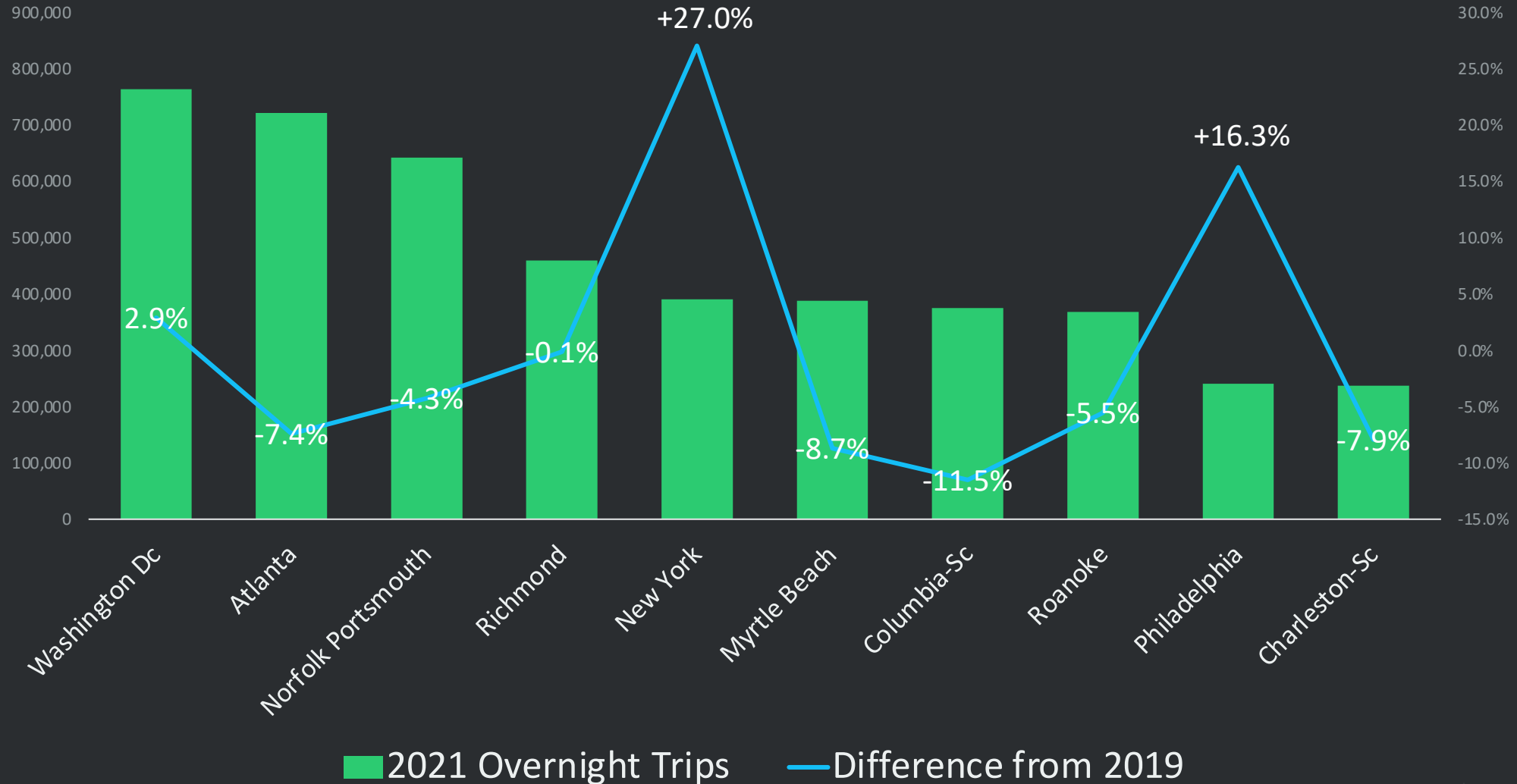
- Atlanta
- Washington DC
- Norfolk/Portsmouth/  
Newport News
- Richmond/Petersburg
- Florence/Myrtle Beach

## TOP FIVE IN 2021

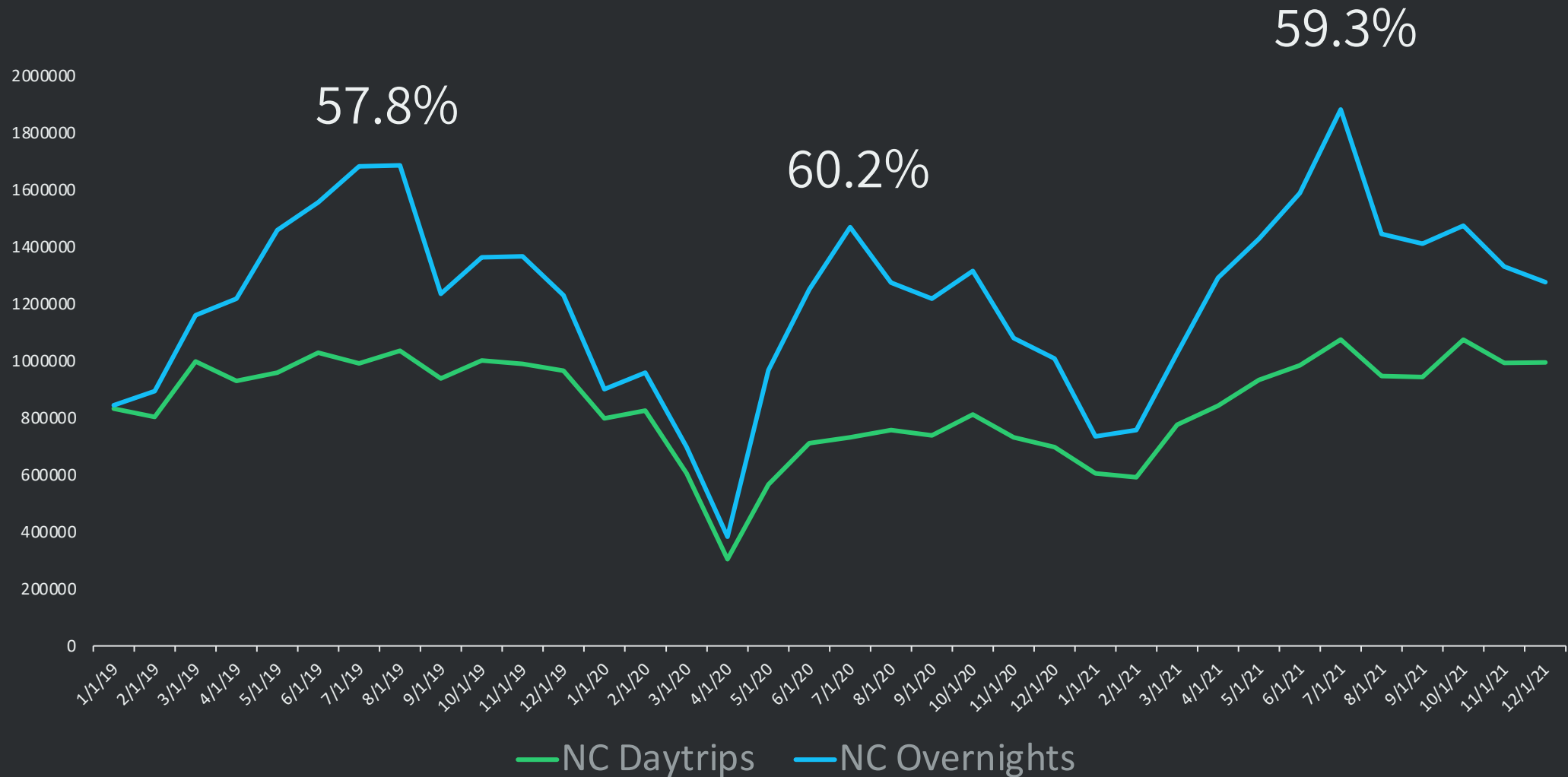
- Washington DC
- Atlanta
- Norfolk Portsmouth
- Richmond
- New York



# Germ's: How North Carolina Visits have Changed

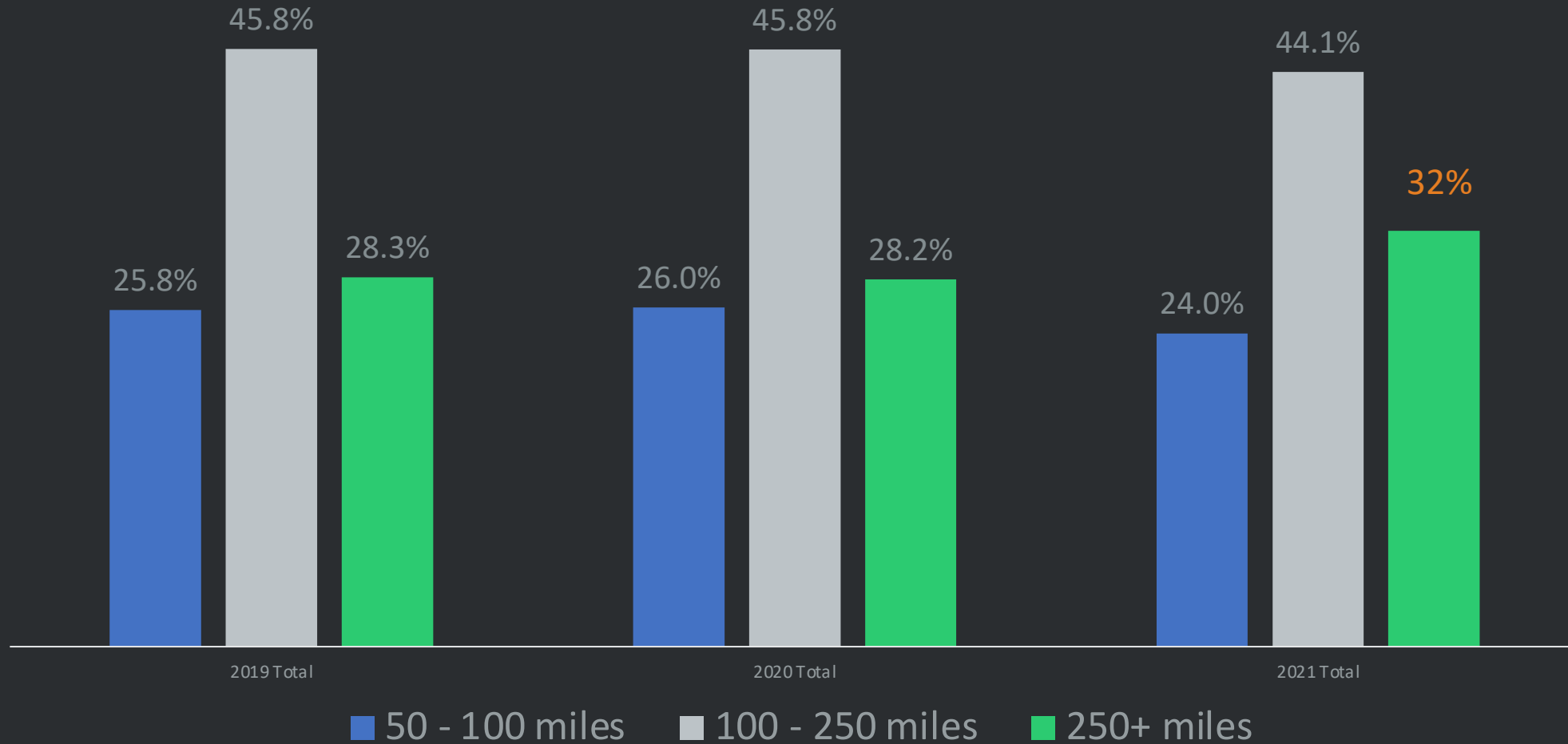


# Germ's: An increasing % of Road Trips are Staying Overnight





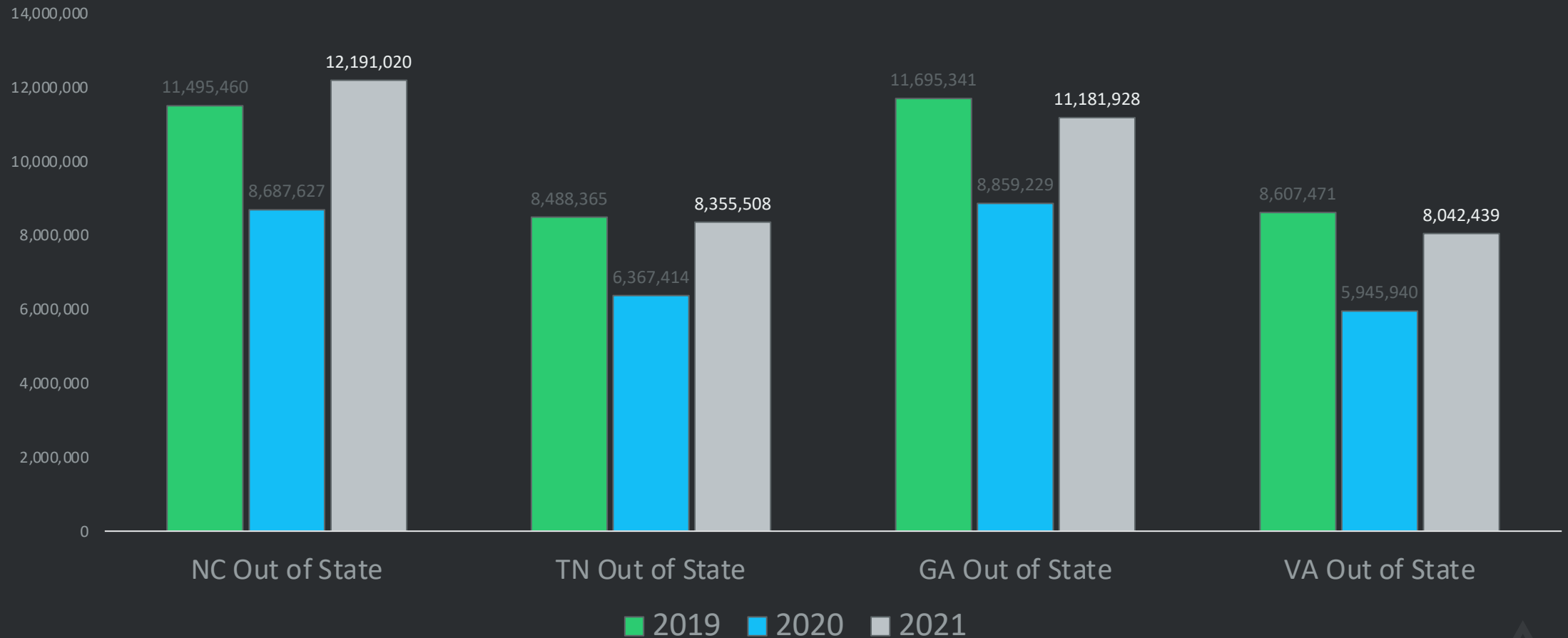
# Germs: Trips From 250+ Miles Have Climbed 13%



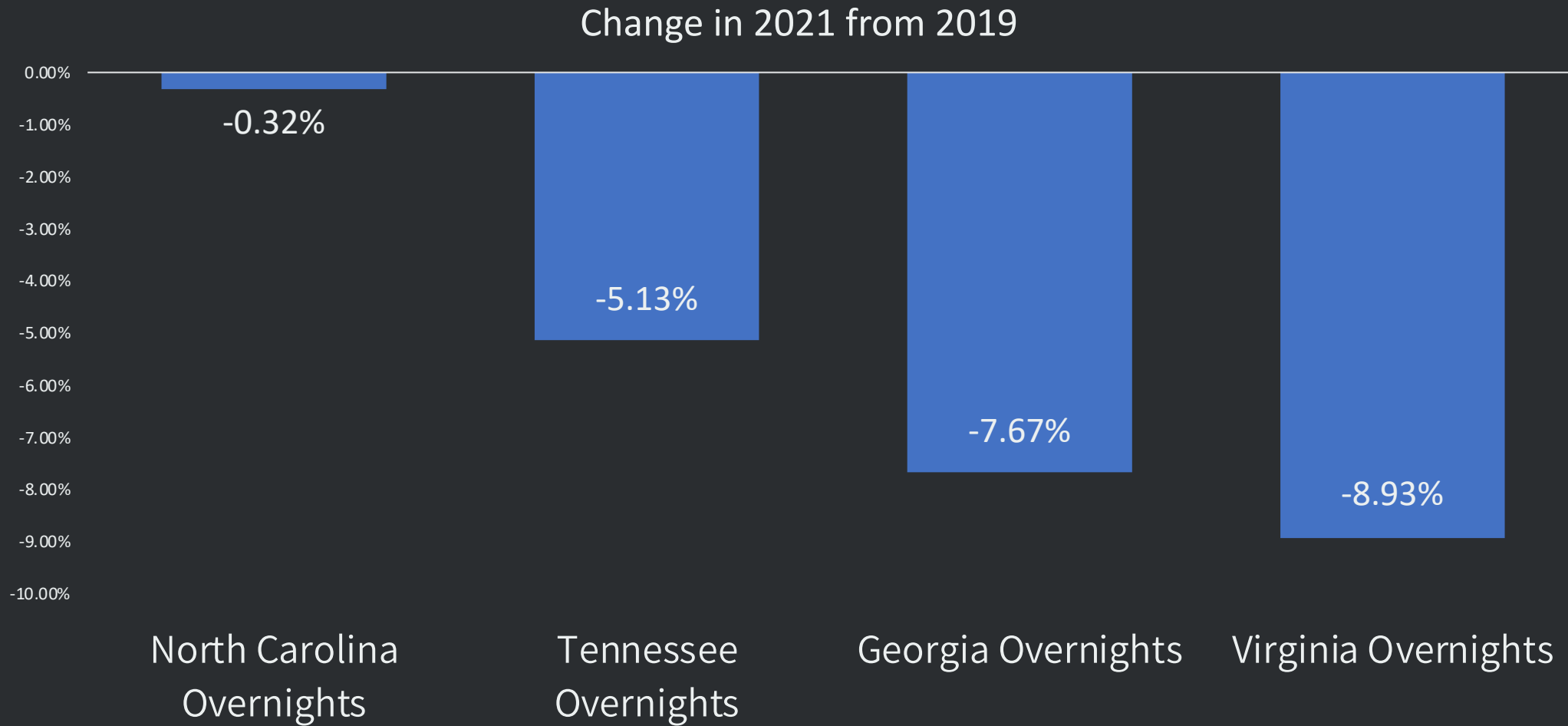
# The Competition: We are not in this Alone



# Overnight Road Trip Volume Has Increased Vs Competition



# Overnight Road Trips to NC Held; Competing States Fell



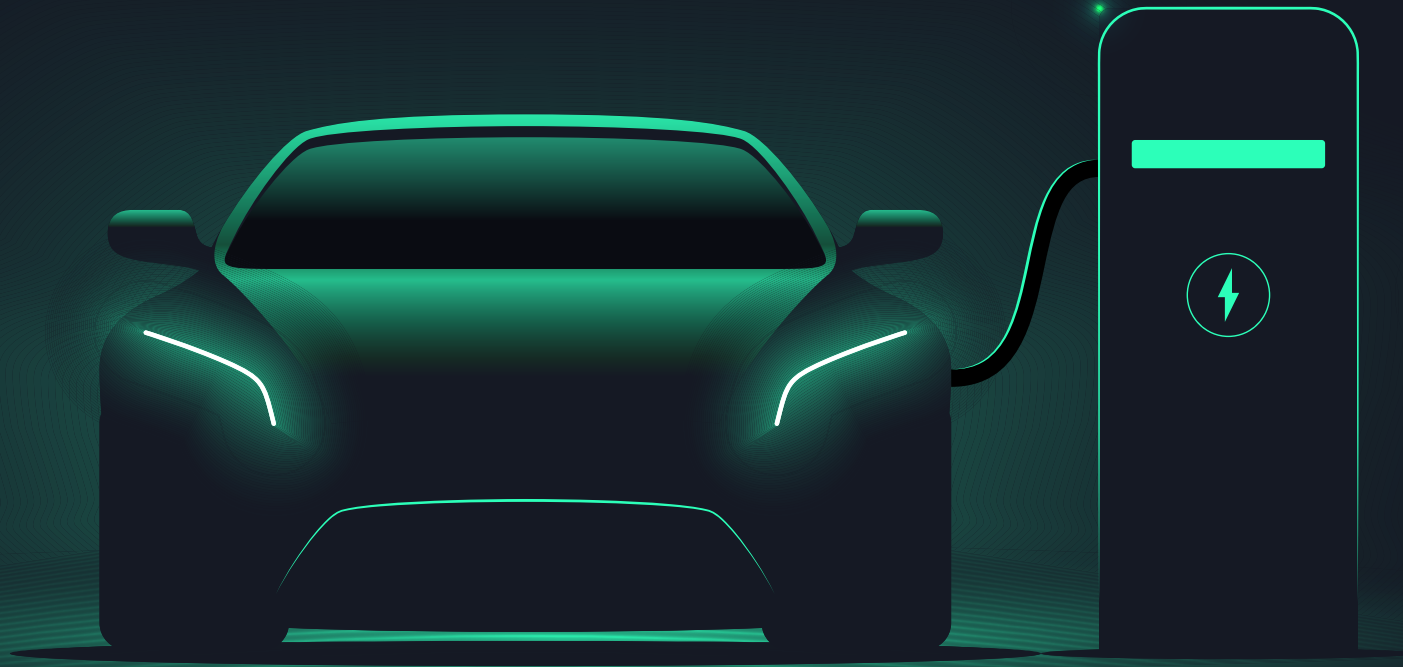


# Homes, Germs and Wheels

- Let's talk about Wheels



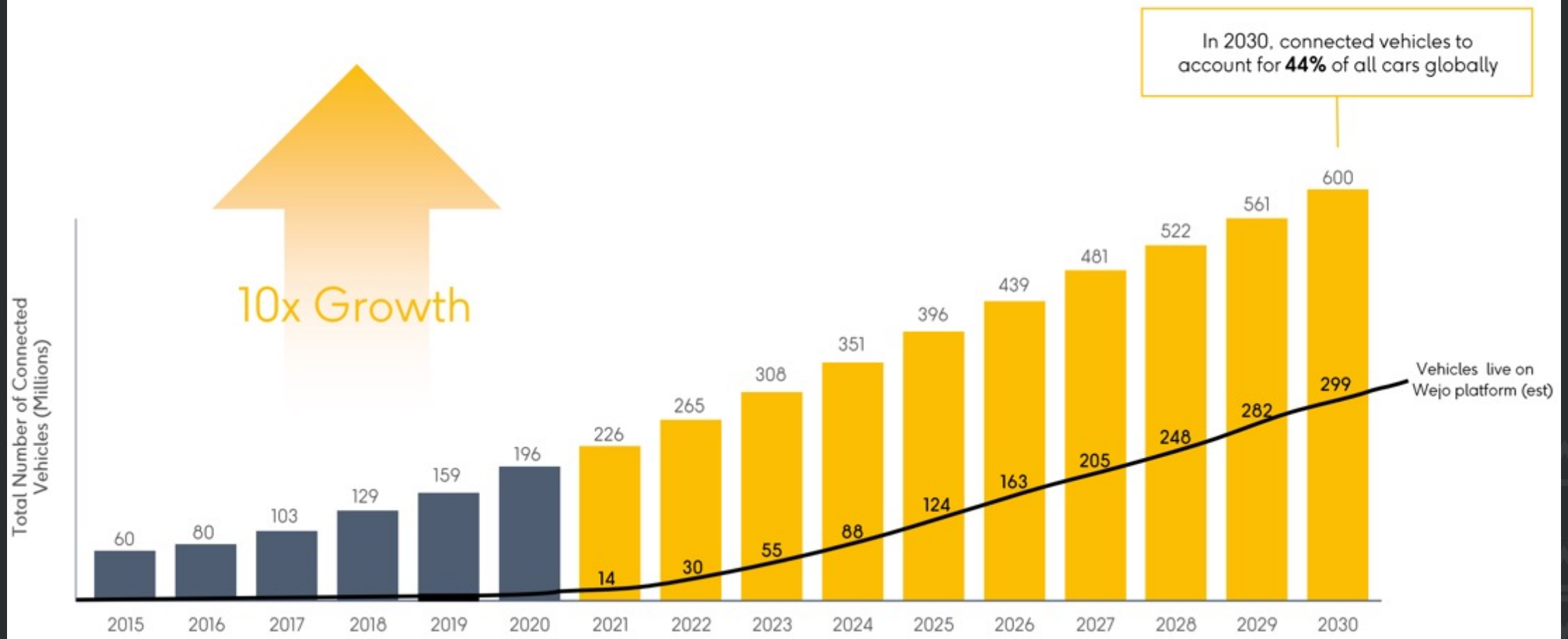
# A Giant Change is on the Horizon



# By 2030, 10X Growth Will Mean 44% of Cars will be EV

## The Universe of AV, EV & Connected Vehicles is Rapidly Expanding

From 2020 to 2030, the total number of connected vehicles is projected to triple



# Electric Vehicles: Yes - it's Finally Happening

- 7 of 8 Super Bowl Auto Ads Featured Electric Vehicles
- GM will be All Electric by 2035
- Even before the pandemic, 80% of all long-haul travel is in cars, which means:
- “The MAJORITY of economic impact from travel comes from passenger vehicle travel”



**There's Just One Problem...**



A woman with blonde hair in a braid, wearing a light pink button-down shirt, stands next to a red electric vehicle. She is looking off to the side with a thoughtful or slightly concerned expression. A black charging cable is plugged into the car's port. The background shows a blurred city street with a red awning and a building.

# Range Anxiety





# How do we turn the **GREAT** American Road Trip...





# Into the GREEN American Road Trip?







Put Chargers Where Travelers Go

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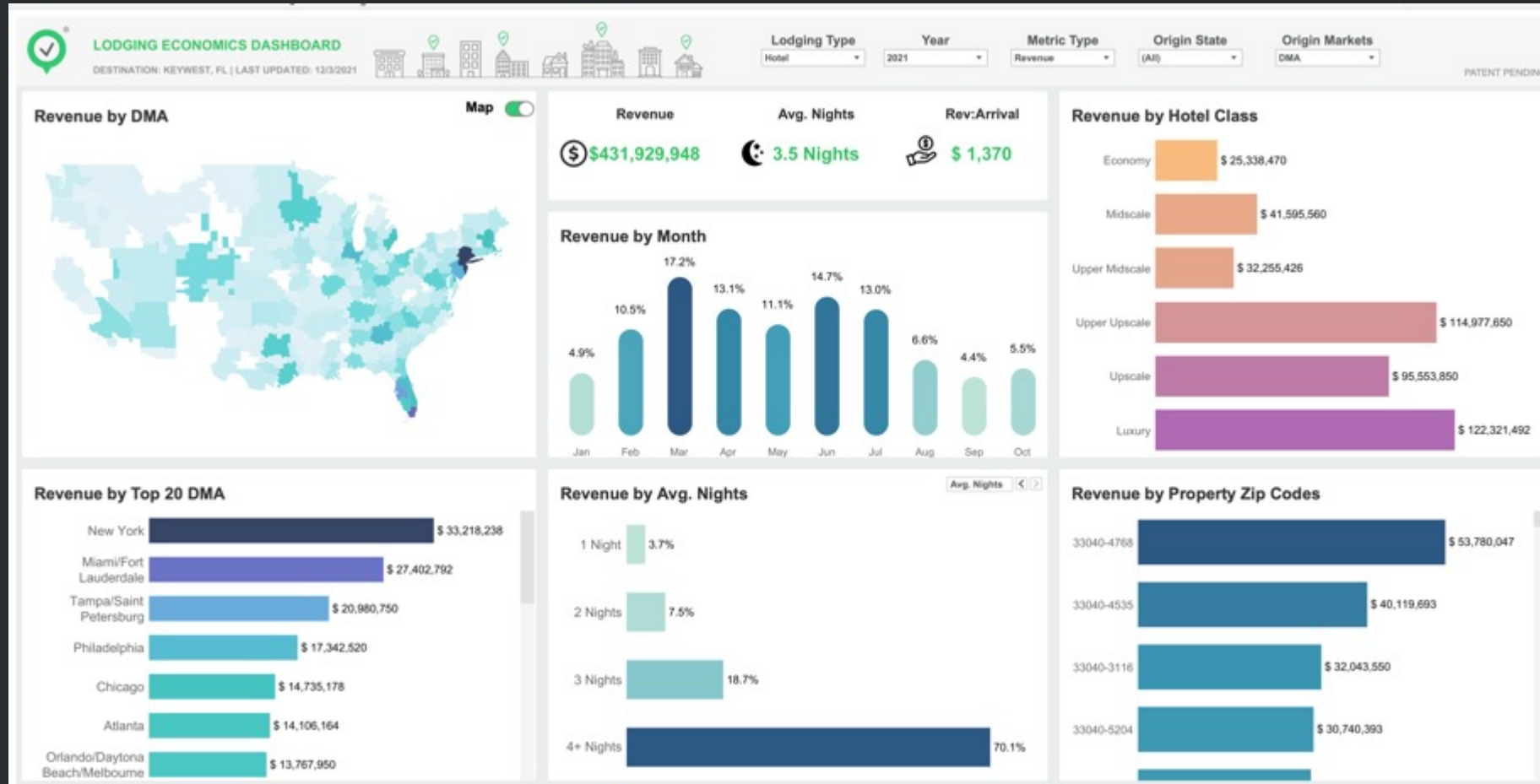
## WHEELS

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# How Are Hotels Vs Vacation Rentals Trending for you?



Arrivalist Lodging - Now in Visit NC Co Op



# Thank You!

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