SPECIAL COVID-19 RESEARCH REPORT
HOSPITALITY & TRAVEL
PREPARED FOR U.S. TRAVEL ASSOCIATION
MAY 2020
INTRODUCTION

To prepare for when America comes out of quarantine, Edelman surveyed consumers to understand how they feel now about travel, uncover expectations of travel and hospitality brands post-COVID 19 and insights on what the future might look like.

RESEARCH OBJECTIVES

UNCOVER WHAT CONSUMERS EXPECT FROM BRANDS DURING THE PANDEMIC AND HOW THEY WILL ENGAGE AS WE COME OUT OF THE PANDEMIC

UNDERSTAND CURRENT CONSUMER ATTITUDES TOWARD TRAVEL IN THE WAKE OF COVID-19

OUTLINE ESSENTIAL PRINCIPLES ON HOW TRAVEL BRANDS SHOULD COMMUNICATE AS THE PANDEMIC EASES
**METHODOLOGY**

10-minute online survey in the U.S.

Total sample of n=2,000 nationally representative U.S. adults ages 18+

Each respondent exposed to 1 group of sector-specific questions (n=500 per sector)

All fieldwork was conducted between April 20-21, 2020

**Margin of error**
- U.S. General Population: +/- 2.2% (n=2,000)
- Within each sector: +/- 4.4% (n=500)
Of Americans are already planning a future vacation

24%

As many people are planning a trip as something to look forward to than because of low prices

2x

39%

Say a family vacation will be their first trip after the pandemic

19%

Say a family reunion will be their first trip after the pandemic

Q25: How, if at all, has COVID-19 (coronavirus) impacted your travel plans? Select all that apply. Base: National split sample n=500

Q28b: Which of the following types of trips or vacations are you planning to take after the economy re-opens and stay at home orders are lifted? Base: National split sample n=500
BUT PEOPLE ARE APPROACHING TRAVEL WITH CAUTION

First Trip – Timing (after the economy reopens)

- Within 1 month after re-opening: 8%
- 2-3 months after re-opening: 32%
- 4-5 months after re-opening: 20%
- 6 months or more after re-opening: 22%
- Not sure: 18%

Most common first trips:
- Day trip/experience close to home (35%)
- Multi-day/overnight road trips (23%)

Q28: What is most likely to be your first trip or vacation after the economy reopens and stay at home orders are lifted? Select all that apply. Base: National split sample n=500.

Q29: And when do you think you might take your first trip or vacation after the economy reopens and stay at home orders are lifted? Base: National split sample n=500.
### PEOPLE ARE MORE COMFORTABLE WITH LODGING THAN OTHER FORMS OF TRAVEL

#### COMFORT LEVEL WITH TRAVEL OPTIONS

<table>
<thead>
<tr>
<th>Option</th>
<th>Comfort Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>50%</td>
</tr>
<tr>
<td>Home or apartment rentals</td>
<td>46%</td>
</tr>
<tr>
<td>Rental cars</td>
<td>45%</td>
</tr>
<tr>
<td>Air travel</td>
<td>38%</td>
</tr>
<tr>
<td>Train travel</td>
<td>32%</td>
</tr>
<tr>
<td>Group tours</td>
<td>27%</td>
</tr>
<tr>
<td>Cruise ships</td>
<td>21%</td>
</tr>
</tbody>
</table>

Though hotels have a slight advantage over rentals, it is not a statistically significant one.

Some travelers may prefer the formal and consistent housekeeping process of a hotel, but others may prefer the isolation and limited use of an Airbnb.

In order to maintain and grow this preference, Hotels must continue to innovate and build safety and sanitation into the experience and communicate these changes frequently and transparently.

Q30: What kind of information do you want to hear from travel and hospitality brands as stay at home orders are lifted?
Base: National split sample n=500
AMERICANS BELIEVE TRAVEL COMPANIES ARE CRITICAL, BUT DON’T TRUST THEM TO TELL THE TRUTH

48% Believe the country will not make it through this crisis without travel or hospitality brands playing a critical role in addressing the challenges we face.

44% Trust the travel or hospitality brands they currently use to tell the truth about the virus and how they are responding to it.

Q31b: Please indicate how much you agree or disagree with the following statements about travel or hospitality brands and how they are responding to the current COVID-19 (coronavirus) pandemic.
Base: National split sample n=500
*Source: 2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus; U.S. Data collected between March 23 and March 26, 2020
DESPITE THAT, BRANDS WHO SHOW A COMMITMENT TO SAFETY AND EMPLOYEES STAND OUT POSITIVELY

Q33c: Which travel or hospitality brands have stood out to you positively or negatively during the coronavirus pandemic? Why?

Base: National split sample n=500

“Hilton and Hyatt hotels because they’re staying on the forefront of making sure that guests are protected during the virus and that the rooms are sanitized and clean.”

“Delta airlines. I read an article that their CEO is giving his salary to his employees during this time.”

“… I will also never take a cruise again and despise how Carnival lied and covered up their problems with various cruise ships and booking tactics.”

“Airbnb has stood out positively because they send frequent updates about their plan of action.”
Think that the actions a travel or hospitality brand takes now in response to the COVID-19 pandemic **are important** in their likelihood to **support that brand in the future** through purchases, loyalty and advocacy.

Q32: How important are the actions a travel or hospitality brand takes now in response to the COVID-19 (coronavirus) pandemic on your likelihood to support that brand in the future through purchases, loyalty or advocacy?
Base: National split sample n=500

**ACTION TAKEN NOW WILL INFLUENCE CHOICE LATER**

- Not at all important
- Not too important
- Somewhat important
- Very important
- Extremely important

88%

**DESIRED INFO:**

- 58% How brands are protecting customers and employees in the wake of COVID-19
- 58% Sanitation practices and guidelines
- 45% How brands are helping their communities/the world in the wake of COVID-19
- 44% Discounts, deals and coupons
- 31% What brands are doing to rehire employees
- 20% Special offers for loyalty members
- 17% Regular ads for a brand or its services

Q30: What kind of information do you want to hear from travel and hospitality brands as stay at home orders are lifted?
Base: National split sample n=500
A NEW JOURNEY

Anxieties over health and safety will meaningfully change the travel journey end to end. Where the focus was once convincing travelers to choose your brand over competitors, now we must convince them to take the leap and travel at all. Collaboration across the category, and helping people feel excited and at ease is key to helping revive the industry.

Travelers are going to think seriously about how safe it is to travel regardless of destination or brand.

Travelers will put more scrutiny into the practicality of a trip - considering alternative ways to travel, emergency backup plans, and extras to include for peace of mind.

All brands must work together in order to help travelers overcome this phase and make a commitment to take a trip.

Bookings will be made based not on price but on the systems and structures in place after lock-down. Travelers likely will not sacrifice safety just for a good deal.

Arriving at a destination was once about excitement but seeing lines, crowds or a lack of direction could induce anxiety.

The whole trip is much more interconnected experience. A hotel is no longer just a conduit to experience but a haven to return to after exploring unfamiliar environments.

Confidence will build after the first trip but continuing to reassure and get feedback from travelers can help build long-term comfort and brand trust.
PRINCIPLES FOR COMMUNICATION

We expect the return to travel happen slowly over the rest of the year. We recommend that U.S. Travel continue to communicate with audiences to stay top of mind and relevant. Here are some steps we suggest you take as you plan your communications strategy around the re-opening of the economy:

1. **Keep Pace with People:** Recognize that people are taking “baby steps” when it comes to traveling again and offer support and planning resources accordingly.

2. **Lean Into Where People are Going First:** Focus communications around the type of travel consumers are telling us they will participate in first like family gatherings and regional road trips (vs. other types of travel such as a solo outings, girls’ trips, or international vacations).

3. **Build Confidence:** Continue to reassure guests that cleanliness and safety are top priorities and elevate this message ahead of anything related to pricing, discounts or deals.

4. **Stay Vocal with Information People Care About:** Keep producing a steady stream of content, especially on social. While customer experience is important, more than ever consumers are keeping an eye out for corporate stories and employee spotlights.

5. **Be Transparent:** Share the actions you’re taking to keep travelers, employees and communities safe, especially when those steps are not necessarily profitable (e.g., planning to limit certain properties to 50% occupancy, number of attendees at events).
THANK YOU!

If you’d like more information or to discuss, reach out to:

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