



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

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

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

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+

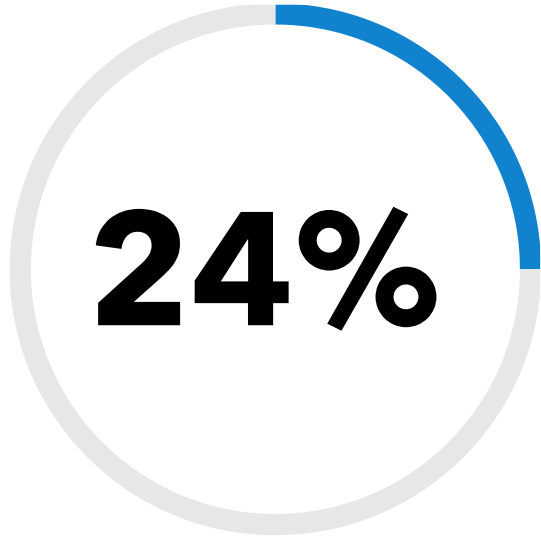
Each respondent exposed to 1 group of sector-specific questions (n=500 per sector)

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)

VACATIONS ARE ASPIRATIONAL AND A CHANCE TO RECONNECT

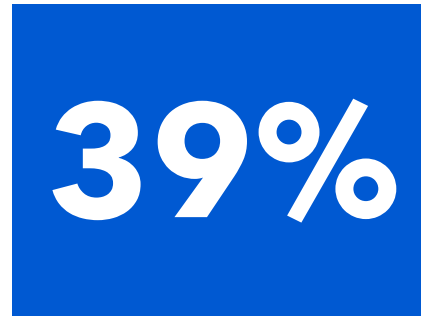


Of Americans are already
planning a future vacation

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



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



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

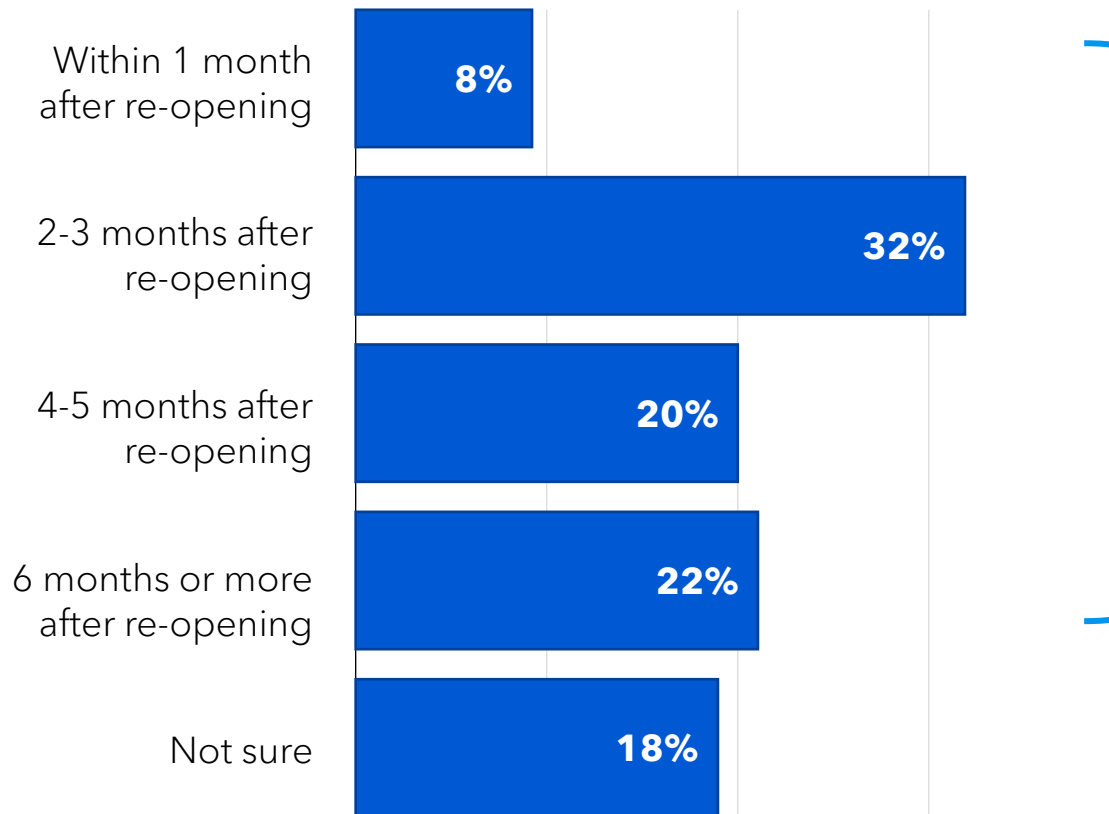


Say a **family reunion** will be their first trip after the pandemic

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)



Most common first trips:



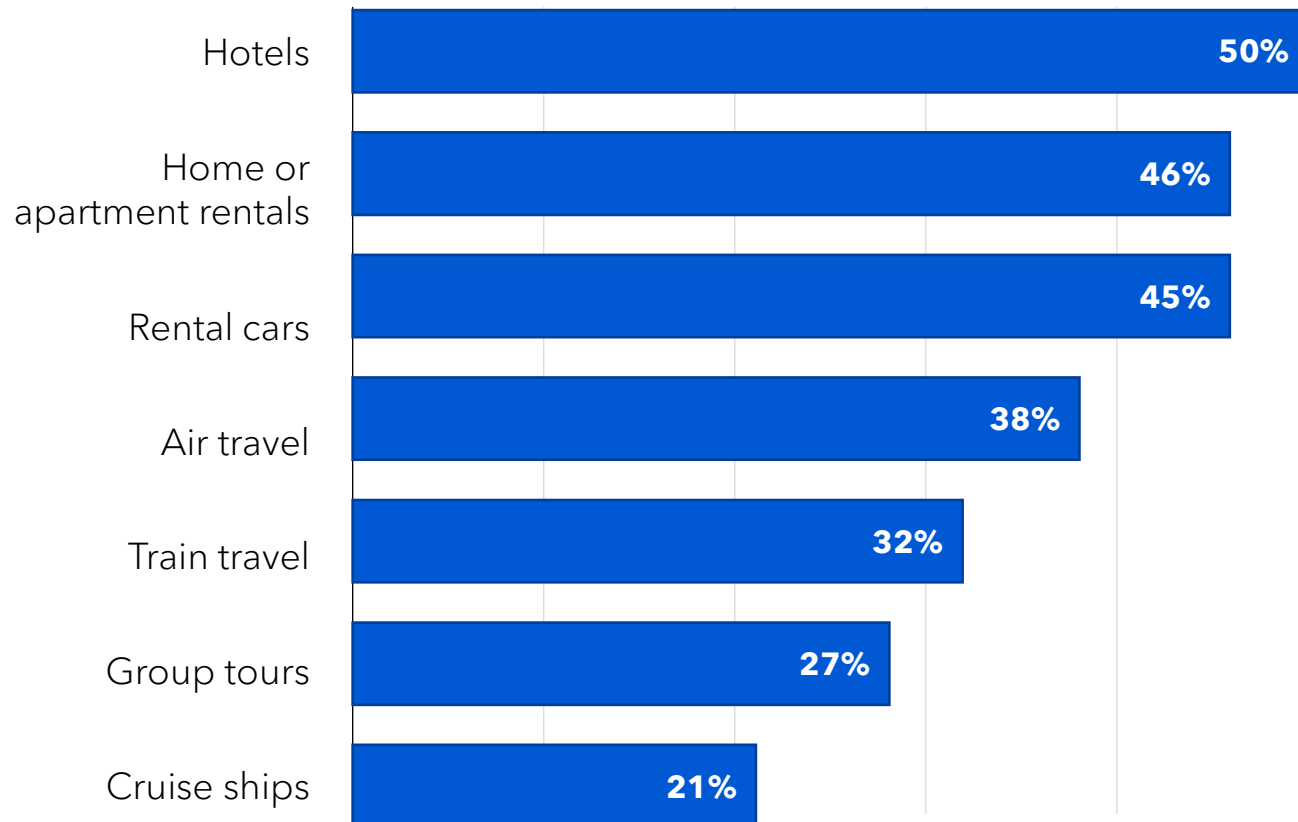
Day trip/experience close to home (35%)



Multi-day/overnight road trips (23%)

PEOPLE ARE MORE COMFORTABLE WITH LODGING THAN OTHER FORMS OF TRAVEL

COMFORT LEVEL WITH TRAVEL OPTIONS



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.

AMERICANS BELIEVE TRAVEL COMPANIES ARE CRITICAL, BUT DON'T TRUST THEM TO TELL THE TRUTH

From 2020 Brand Trust*

Compared to 62% of brands generally

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

From 2020 Brand Trust*

Compared to 65% of brands generally

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

Companies viewed positively (unaided)



*"**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.**"*

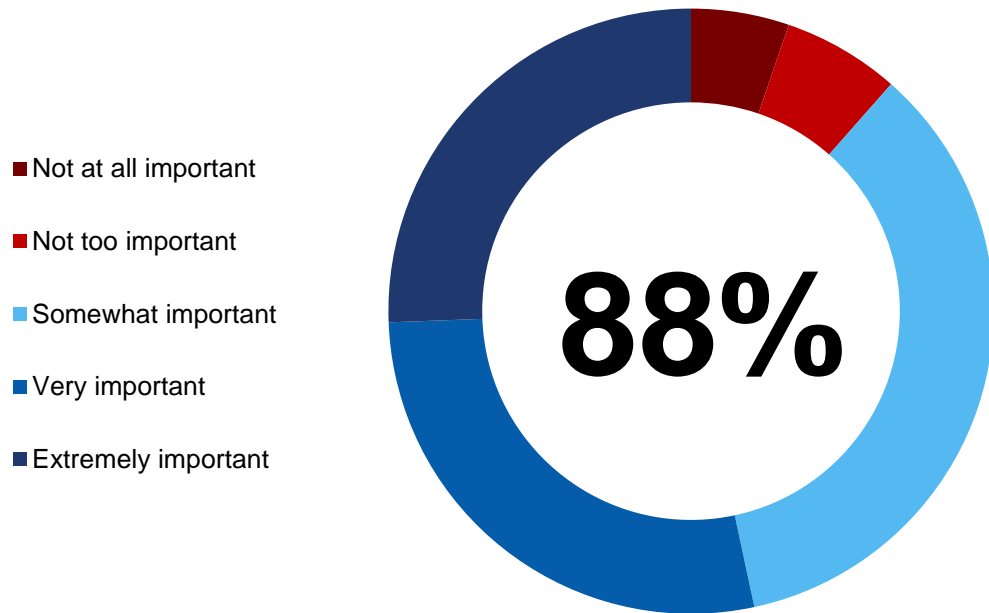


*"... I will also never take a cruise again and despise how **Carnival lied and covered up their problems** with various cruise ships and booking tactics."*



*"**Airbnb** has stood out positively because they **send frequent updates about their plan of action.**"*

ACTION TAKEN NOW WILL INFLUENCE CHOICE LATER



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

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

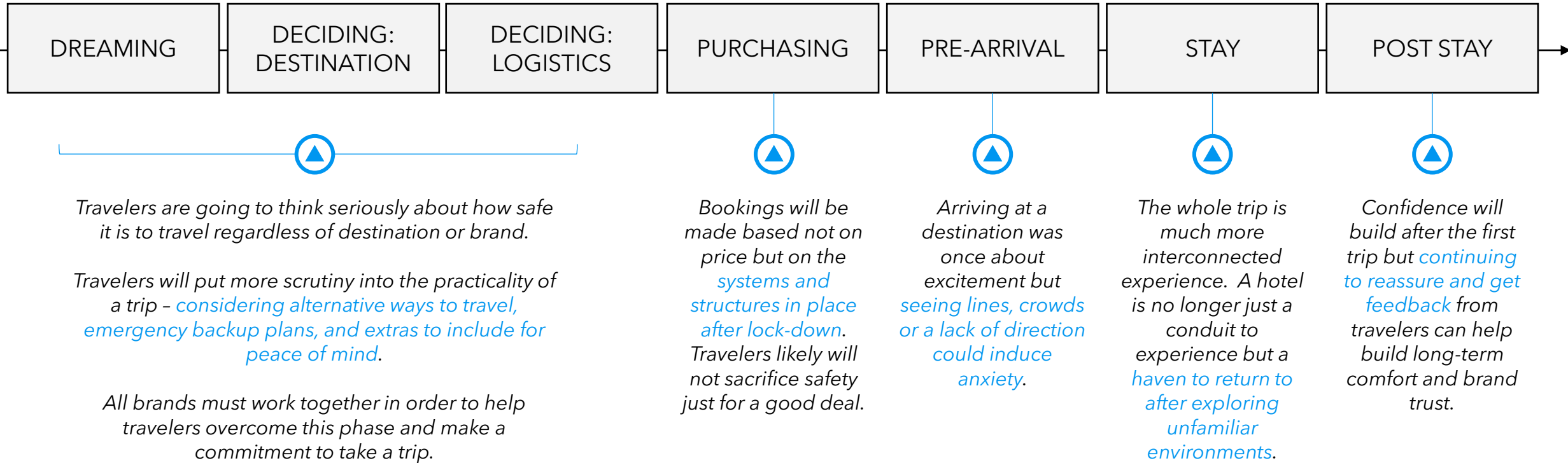
20% Special offers for loyalty members

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.



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:

Brittany Cummings, Vice President, DC Brand

Emily Kaplan, Vice President, DC Brand & Media Strategies