



Let's be honest ...

There is nothing NORMAL about the 'NEW NORMAL.'

The world is experiencing an unprecedented degree of change and uncertainty. However, our mandate is clear: we must provide the peace of mind consumers need to travel with confidence. The first wave of the COVID-19 pandemic teaching us the best ways to do this.

Three lessons we have learned to-date are:



Cleanliness is table stakes.

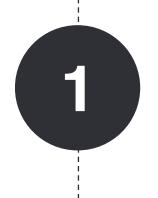
Enhanced cleaning practices + technology are a minimum customer - and associate - expectation (and will continue to be post-COVID) 2

We are in this **together**.

We can influence human behavior to prevent spread through low-tech (mandated face coverings) and tech-enabled measures. 3

Coordinated national government effort is **critical**.

Countries with coordinated national responses recover faster and do a better job monitoring and protecting their recoveries.



Cleanliness is table stakes.

Marriott's Commitment to Clean has three key pillars:

GLOBAL CLEANLINESS COUNCIL

Experts to help identify the next level of global hospitality cleanliness standards

PROTOCOLS + PRODUCTS

To address the known modes of COVID-19 virus transmission

ASSOCIATE TRAINING + ENGAGEMENT

To train and sustain hygiene and safety behaviors



We are in this together.

As operators and as travel industry partners we can do our part by evolving our service offerings.

WE WEAR BECAUSE WE CARE

Mandating mask-wearing as a united front for the industry is critically important to demonstrating our commitment to the well-being of guests and our associates alike.

CONTACT-LESS OPTIONS

Maximizing and promoting digital offerings both reduces friction in the travel experience and increases traveler choice by giving options to avoid unnecessary contact to complete transactions.

STANDARDS + ACCOUNTABILITY

With more than 7,400 hotels, monthly self-audits and certifications are essential to consistent execution of global standards. Guests must be able to expect the same level of rigor in every hotel.



Coordinated national government effort is **critical**.

Countries with coordinated national responses are recovering faster and doing a better job monitoring and preserving those recoveries. Many of these countries are located in APAC, including Vietnam, New Zealand, Singapore, Australia and China.*

UNITED STATES

⁴⁵⁰ Confirmed Deaths Confirmed Cases VIETNAM 1.5kConfirmed Cases Confirmed Deaths NEW ZEALAND 51k Confirmed Deaths Confirmed Cases SINGAPORE 16k Confirmed Cases Confirmed Deaths AUSTRALIA 4,658 Confirmed Cases CHINA Confirmed Deaths Confirmed Cases

^{*}Center for Systems Science and Engineering (CSSE) at Johns Hopkins University (JHU)



Coordinated national government effort is **critical**.

According to preliminary research on the first wave of the outbreak, countries with the best success in managing their COVID-19 outbreaks have several of these characteristics in common:

HEALTHCARE MANAGEMENT

- Rapid Testing + Results
- Contact Tracing (manual and tech-enabled)
- PPE + Medical Equipment Production + Stockpile
- Government-supported quarantine/medical leave

SOCIAL + POLITICAL RESPONSE

- Consistent messaging
- Strict social distancing and mask requirements during outbreaks
- Early and aggressive action (to first and all
- subsequent outbreaks)

FINANCIAL POLICY RESPONSE

- Sizeable and sustained stimulus
- Industry-specific financial relief, including grants and loans

A closer look CHINA RECOVERY

The first wave ...

90
of our hotels in China were closed at height of first wave.

55*
Days between end of first wave and new outbreak in Beijing (June 11).

eeks to respond to and c

Weeks to respond to and control new outbreak in Beijing through coordinated contact tracing, testing and shutdowns.

... and today

50%

Occupancy rates at our 400 hotels open in China. 90 of these hotels were closed at height of first wave.

80%

Of guests in our China hotels are travelers from within China. Millennials have been first to return to travel;
Boomers still hesitant.

90%

China domestic travel is on track to recover to 90% YOY.* International air is expected to improve next, beginning within "travel bubbles." Group will be last to recover.

^{*}South China Morning Post. June 24, 2020.