

HOTELS IN THE AGE OF COVID-19

Lessons learned in the first wave

JW Marriott Hotel Nara. Opened July 22, 2020. 800th Marriott hotel in APAC.

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:

1

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.*

1

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

2

**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.

3

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.*

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

| | | |
|--|---------------------------|-------------------------|
|  VIETNAM | 0 Confirmed Deaths | 450 Confirmed Cases |
|  NEW ZEALAND | 22 Confirmed Deaths | 1.5k Confirmed Cases |
|  SINGAPORE | 27 Confirmed Deaths | 51k Confirmed Cases |
|  AUSTRALIA | 176 Confirmed Deaths | 16k Confirmed Cases |
|  CHINA | 4,658 Confirmed Deaths | 87k Confirmed Cases |
|  UNITED STATES | 150k Confirmed Deaths | 4.4m Confirmed Cases |

3

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).

2*

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.