U.S. Travel

The Shared Responsibility of Traveler Health & Safety

Tripadvisor
1. Traveler Behavior Update
2. Traveler Health & Safety Sentiments
3. Tripadvisor Travel Safe Initiative
### The road to recovery and the five phases:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>1</strong> Decline</td>
<td>News and concern spreads rapidly, people begin practicing social distancing and <strong>travel declines</strong> sharply as a result.</td>
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<tr>
<td><strong>2</strong> Plateau</td>
<td>Potential travellers <strong>stay inside</strong> to ensure safety and help “flatten the curve.”</td>
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<tr>
<td><strong>3</strong> Emerge</td>
<td>As the crisis begins to pass, lockdown restrictions begin to ease and people begin venture out again to <strong>visit restaurants and businesses in their home city</strong>.</td>
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<tr>
<td><strong>4</strong> Domestic</td>
<td>As confidence continues to grow, people feel more comfortable traveling again and begin to visit friends and family in <strong>their home country</strong>.</td>
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<tr>
<td><strong>5</strong> International</td>
<td>In the final stage of recovery people one again feel comfortable <strong>travelling abroad</strong>.</td>
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</tbody>
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In the US, some markets remain in Plateau Phase, some in Emerge, and still others in Domestic
United States: Domestic Lookers

As domestic lookers increase, booking window decreases in the U.S.

Source: Tripadvisor Internal Data; Data through 6/20
In mid-April, U.S. accommodation page views began to increase as consumers researched domestic trips.
In late April, U.S. attractions page views began to increase and have continued to show growth.
U.S. consumers increase searches for outdoor attractions as restrictions begin easing
In early May U.S. domestic restaurant page views began to increase, a positive sign of recovery.

Source: Tripadvisor Internal Data; Data through 6/20
In the last week, 82% of hotel searches were for the next two months.
COVID-19
Global Survey Insights: Health & Safety
Travelers continue to be excited about travel and future trips
Travelers can’t wait to book their next trip

82% of respondents are excited to plan their next trip post Covid-19

63% have spent time in the last week planning and researching potential trips to take post Covid-19

50% have spent up to five hours in the last week planning their next trip post Covid-19

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 1 (3/20)
How are consumers defining the end of Covid-19?
What are the most important signals to consumers today that things are returning to normal?

41% of respondents say lifting stay-at-home orders and travel restrictions are the most important indicator that things are returning to normal.

Kids going back to school and offices reopening are the second most important for 30%

Restaurants reopening and sporting events resuming account for 20%

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 2 (4/5)
Future Travel Planning Changes
69% of respondents say they will do more research when planning their next trip [+52% more than early April]

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 3 fielded 4/15 vs Wave 2 fielded 4/3
70% of respondents say when thinking about their next trip, they will plan and book in advance versus spontaneous trips.

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 2 (4/5)
83% of respondents say for their next trip, flexible cancellation policies on anything they book are a must [+52% more than early April]

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 3 fielded 4/15 vs Wave 2 fielded 4/3
53% of respondents say when thinking about their next trip, they will seek value (quality for money) rather than the lowest price.

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 1 (3/20)
Cleanliness is the most important factor in determining accommodations after Covid-19

Thinking about traveling after Covid-19, how important are the following choices in selecting an accommodation? (Extremely/very Important)

- **Cleanliness**: 92%
- **Insurance on the booking**: 66%
- **Discounts**: 56%
- **Proximity to where consumers live**: 53%

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 4 fielded 5/9/20
What actions can travel providers take to increase cleanliness for consumers?

- **88%**
  Increased frequency of disinfection of high-contact equipment

- **84%**
  Cleanliness/sanitization certification by independent experts

- **82%**
  Provide hand sanitizer/disinfectant wipes to each traveler

- **81%**
  Publicly displayed cleaning and sanitization protocols

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 4 fielded 5/9/20
What is important to consumers when selecting a travel destination?

147 INDEX
Low number of reported COVID-19 cases (infections or fatalities)

135 INDEX
Destinations with high engagement in hygiene and sanitation practices

132 INDEX
Area / ability to avoid crowded places when traveling

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 4 fielded 5/9/20
Travelers are seeking cancellation policies, deal finders and reviews to plan their next trip.

162 Index
A travel insurance policy that covered disruption caused by Covid-19

143 Index
Cancellation Policy Finder - find the most flexible cancellation policies

126 Index
Deals Finder - find the best deals / biggest discounts

120 Index
Reviews based on cleanliness / health safety

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 2 (4/5)
Restaurants
42% of consumers say when restrictions are lifted “I will go to a restaurant and dine-in like I did before Covid-19”

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 3 (4/15)
Consumers seeking increased hygiene practices to feel comfortable dining at restaurants again

- **86%**
  - Staff are regularly disinfecting tables and chairs before seating new parties

- **85%**
  - Hand sanitizer/disinfectant wipes are available to customers upon entering/exiting

- **84%**
  - Staff member managing entry at front entrance and ensuring business isn’t overcrowded

- **83%**
  - Employees are routinely sanitizing their hands and/or wearing gloves

Source: Covid-19 Pandemic Survey; Tripadvisor users; Wave 4 fielded 5/9/20
Travel Safe Initiative
Safety is top of mind for travelers.

- 65% of respondents will not travel until they see physical changes that make them feel safer.
- 74% of travelers say a checklist of safety measures on Tripadvisor listings would be very or extremely helpful.

Enter: Tripadvisor’s Travel Safe Initiative

On June 24, 2020, Tripadvisor launched new program dedicated to:

- **Putting travelers’ minds at ease while prioritizing their safety:** Provide travelers with digestible information & guidance pertaining to safety as they start to plan future travel.

- **Supporting our partners:** Aid in recovery by helping businesses share their safety measures and overall response with travelers as they make their plans.

**TAKE ACTION:** Add your safety measures to the Management Center. Go to tripadvisor.com/Owners to get started.
How It Works

Leveraging expertise from world health & safety organizations, compiled checklist that hotels or restaurants can use to share safety measures. Businesses that activate the checklist will benefit from:

**Listing Page Updates**
Once activated, a notification will appear at the top of the page to catch traveler attention. It will link to a new “Keeping you safe during COVID-19” section which includes safety measures and how travelers can contact business directly or ask questions via Q&A feature.

**Search Filter**
When travelers are searching for accommodations in your area - they’ll be able to filter for hotels that have indicated they are taking safety precautions resulting in higher visibility for business to potential, safety-focused guests.

**Traveler Reviews**
Travelers report that they are most interested in feedback from other guests on the current state of safety at businesses. To help gather this information from recent visitors, questions will be added to review questionnaire to confirm safety experience at each location.
Keeping you safe during COVID-19

What you can expect during your stay
- Linens sanitized between guests
- Hand sanitizer (60%+ alcohol)
- Employees have paid sick time
- Regularly sanitized high-traffic areas
- 24-hour minimum between guests
- Contactless employee temperature checks
- Employees must wear masks
- Floor indicators
- Regular hand washing required
- Regularly sanitized high-traffic areas
- Individually sealed amenities
- Contactless check-in
- Contactless check-out
- Doctors available 24/7

A note from Sheraton Atlanta Hotel

We are working diligently to ensure that our hotel continues to provide essential services in this challenging environment. We take standards for hygiene and cleanliness very seriously, so we are closely monitoring and following the CDC and WHO guidelines regarding COVID-19, as well as guidance from local health authorities. Our health and safety measures include everything from hand washing hygiene, to hospital-grade cleaning product specifications for guest room and common area cleaning procedures. If a colleague exhibits symptoms of COVID-19, they are instructed not to return to work and instead seek appropriate medical attention. Should a guest exhibit symptoms, our priority is to safely re-locate them to a place where they may receive appropriate medical attention.

With the COVID-19 situation rapidly evolving, we recommend that all guests consult local authorities to understand the latest travel restrictions before they commence their travel.

More questions?
- +1 404-697-6800
- Email hotel
- Post a review
Could you say a little more about it? (optional)

We’d love your opinion! Anything you can share will help other travelers choose their perfect hotel. Thanks!

Safety Amenities
- Does the hotel provide hand sanitizer?
- Are hotel employees required to wear masks?

Hotel Style & Amenities
- Does the hotel provide fax or photocopying services?
- Did your room have an iPod docking station?
- Does the hotel offer pool or beach towels?
- Is this hotel close to the convention center?
Hotels

Checklist of Safety Measures

- Staff required to regularly wash hands
- Regularly sanitized high-traffic areas
- Hand sanitizer available to guests & staff
- Face masks required for staff in public areas
- Floors marked for social distancing
- All linens sanitized in high-temperature wash
- Face masks required for guests in public areas
- Paid stay-at-home policy for staff with symptoms
- 24-hour minimum vacancy between guests
- Regular temperature checks for staff
- Contactless check-in
- Contactless check-out
- Doctors available 24/7
- Individually wrapped toiletries

Disclaimer: Lists will continue to evolve and may change at any time.
Restaurants
Checklist of Safety Measures

- Face masks required for staff in public areas
- Hand sanitizer available to guests & staff
- Regular temperature checks for staff
- Single-use or sanitized menus
- Socially distanced dining tables
- Staff required to regularly wash hands
- Tables disinfected between guests
- Face masks required for guests in public areas
- Floors marked for social distancing
- Single-use or individually wrapped condiments
- Contactless payment
- Contactless ordering
- Paid stay-at-home policy for staff with symptoms
- Curbside/storefront pickup
- Reservations & call-ahead seating only

Disclaimer: Lists will continue to evolve and may change at any time.
Best Practices

1. Select safety measures that apply to your business.
   Be sure selections are accurate to properly set guest expectations.

2. Use free-form text box to provide more details.
   Include links to more information on your website or blog or third party standards (associations, local certifications, etc.)

3. Update information regularly.
   Travelers are very interested in the latest information, so we’ve added a date stamp to the section. Be sure to add updates as you work to comply with the latest regulations and guidelines.
The Opportunity

Partner with Tripadvisor on this free opportunity to:

- **Rebuild traveler confidence** and help them feel comfortable about planning their next trip
- **Position your business** as a safe option to discerning travelers seeking reassurance
- **Leverage reach & scale** of Tripadvisor to highlight your business practices to travelers searching your destination

[Travel Safe Initiative Details]
A glance at Travel in The last month
Travel remains a large vertical with over 1B visits to travel sites globally last month.

In May 2020, Tripadvisor continued to be the #1 travel site globally.
Thank You
**Methodology:**

- Vendor: Qualtrics
- Countries: U.S., Japan, Australia, Italy, U.K., Singapore
- Study fielded on an ongoing basis beginning 3/20/20

**About the vendor:**

- Qualtrics is a third party that has multiple panels totalling 50M respondents across 50+ countries
- Third party verification is employed
- All panelists opt in and multiple panels are used to avoid bias
- All the panels are part of ESOMAR, MRS and other internationally recognized quality bodies.