
TRAVEL + HOSPITALITY MARKETER'S PLAYBOOK



INSIGHTS TO IGNITE TRAVEL IN A NEW NORMAL

ACQUISITION.
CUSTOMER EXPERIENCE.
LOYALTY.



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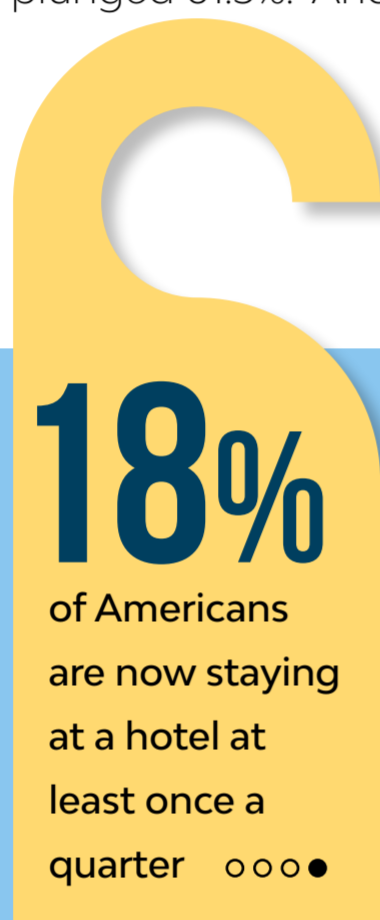
INTRODUCTION

PASSPORT TO POST-PANDEMIC

FIRST, **THE GOOD NEWS:** 33% OF AMERICANS BELIEVE LEISURE TRAVEL WILL RESUME BY AUGUST 2021

And, with over 100 million of Americans vaccinated, that number is set to increase in the coming weeks and months—just in time for the summer travel season.

But, **THE CHALLENGE:** According to 23 travel-related companies, worldwide ad spending tumbled 60.2% in 2020, while revenue plunged 61.5%.¹ And, only 22% of consumers already have a vacation lined up in the next three months.²



NOW BOARDING: HOSPITALITY & TRAVEL MARKETERS

As we look towards travel industry recovery, travel and hospitality marketers will need to use real-time, accurate data to connect with travelers—data available within the **Resonate Ignite Platform™**. We're continuously tracking **consumer sentiment throughout the pandemic** and as we race into a new normal. We're looking at how consumers feel about the economy, finances, and, of course, travel. This gives us a front row seat to who is ready to travel and what they expect when they do leave home.

Grab your ticket, buckle up, and let's get back to flying the friendly skies.

T+H →



In the Travel + Hospitality Marketer's Playbook, we'll explore:

- ✓ The travelers who are eager to jump back on plane or hit the road now
- ✓ The travelers who will need reassurance and/or time before booking a trip
- ✓ How leisure and business travel recovery differs
- ✓ What these travelers expect once they've arrived at their destination
- ✓ Whether airline and hotel loyalty is a deciding factor for post-pandemic travelers

¹Johnson, Bradley. 2021, Mar 18. How Travel Ad Spending and Revenue Tumbled More Than 60% in 2020, and Why Industry Sees Recovery on the Horizon. <https://adage.com/article/datacenter/how-travel-ad-spending-and-revenue-tumbled-more-60-2020-and-why-industry-sees-recovery-horizon/2322166>.

²2021, Apr 12. Lundstrom, Kathryn. More Americans Feel Comfortable Traveling, but Only 22% Have a Trip Booked in the Next 3 Months. https://www.adweek.com/brand-marketing/more-americans-feel-comfortable-traveling-but-only-22-have-a-trip-booked-in-the-next-3-months/?utm_medium=browser_notification&utm_source=pushly&utm_campaign=930230.

MEET YOUR TRAVELERS

46% of consumers already feel safe traveling within their state and 32% feel safe traveling to a different state. Roughly 60% say they'll travel again when a vaccine becomes available so, with vaccines making their way across the country, now's the time to start pushing those travel spots.

BUT, WHO ARE THEY?

And how do those who are ready to hop back on a plane differ from those who would prefer to hold out a bit longer?



EAGER TRAVELER

These travelers believe travel could resume by Summer 2021

TOP VALUES: ACHIEVEMENT, STIMULATION

26% more likely than average American to believe life will be back to normal in 4-6 months

52% male

20% 25-34 years of age

46% full-time employed

10% more likely than the average American to take 4-6 international trips a year

47% completely or very likely to get the COVID-19 vaccine

13%

more likely than the average American to get the vaccine within **ONE MONTH** of availability

TOP HOBBIES:

Beach/lake vacations
Hiking/camping



36%

will travel to another state once vaccines are widely available

These travelers are most likely to book a flight with **Southwest** or **American Airlines** and stay with **Hampton Inn** or **Hilton**.



CAUTIOUS TRAVELER

These travelers believe travel will not resume until October 2021 or later

TOP VALUES: NATURE, SAFETY

45% more likely than average American to believe it will be more than a year before life is back to normal

56% female

18% 55-64 years of age

19% retired

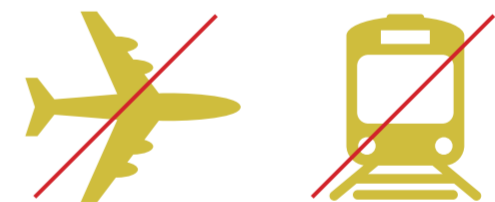
Prefer products that are **SAFE**

20% take 4 or more domestic trips a year

44% completely or very likely to get the COVID-19 vaccine

29%

more likely than the average American to get the vaccine within **ONE YEAR** of availability



43%

will not take a flight or train until vaccines are widely available

When these travelers do resume their vacations, you'll find them at **Holiday Inn** or **Marriott** and booking a flight with **American Airlines** or **Delta**.

It likely comes as no surprise that the **Eager Traveler would crave stimulation and excitement**, while the **Cautious Traveler is focused on safety as a top value**. The Eager Traveler is also more likely to raise their hand immediately for the vaccine so, while both should be on your radar for long-term planning, the Eager Traveler will likely be the one cruising 36,000 feet above the earth this summer.

ACQUISITION

PLANNING THE ITINERARY

Booking a trip doesn't look like it used to. Back in the good old days of travel, a consumer would start daydreaming of Hawaii, research a few hotels, book a flight, and go. Now, you need to go deep into the preferences of travelers to understand what will make them feel comfortable enough to hit, "book a stay."

29%

of EAGER Travelers book through travel sites when they want to get the best deals. Hotels and airlines should consider how they can emphasize the savings of booking directly.



of both Eager and CAUTIOUS Travelers cancelled flights during the pandemic.

20%

HOW CAN YOU MAKE TRAVELERS FEEL GOOD ABOUT TRAVEL?

As of publishing, here's the rundown on how many Americans expect the following precautions before they're ready to resume both business and leisure travel.

59.2% cleaning between **usage**

57.3% all **staff wearing masks and gloves**

57.9% all **passengers wearing masks and gloves**

50% reduced occupancy on **flights/trains**

46.9% temperature checks before **boarding**

Additionally, nearly

15%



15% of all Americans say they'll start traveling when they see others travel. How can travel marketers encourage visitors to share #yourdestination with their friends and family?

This is particularly important for Eager Travelers, who are more likely than average to look to social media for planning ideas and research.

TOP TRAVEL PRODUCT ATTRIBUTES FOR Eager and Cautious Travelers

67% cost-effective / 58% safe / 44% dependable

These travelers want an experience that's budget-friendly, where they know precautions will be in place, and they're not going to be happy about a flight cancelled last minute. Travel marketers should emphasize that they are no longer cutting routes and that all employees will be masked.

Then, we asked, what's your preferred style of leisure trip? For both groups, they answered:



STAYING SAFE



STAYING WITHIN A BUDGET



PLANNING CAREFULLY

FLEXIBILITY IS KEY TO GETTING TRAVELERS BACK ON BOARD

21% of both Eager and Cautious Travelers say their likelihood to review a cancellation policy has increased.

This could be the make or break in booking, so how can you make them feel confident their trip is protected?

The writing is on the wall. To get these travelers back in the air, marketers need three sticky note reminders on their computer. **Safety. Deals. Planning.**

Just under 25%

of both groups book travel 4 weeks to 3 months out, if your goal is to attract the summer vacation crowd, the time is now.

CUSTOMER EXPERIENCE

CHECKING IN

Booking the trip is only the first step. With travelers who may not have spent a night away from home in over a year, the experience needs to be top notch in order to make them feel good about returning to the vacation life. Just under 35% of both groups say the main reason to book travel is to spend time with family so, at the core of your advertising, make sure the idea of getting together with family is represented—and, given both groups are more likely to value tolerance, take note of all the forms family can take in your creative.

Additionally, **36% of each of these groups lists pleasure as a top travel value.** Remember, after a long, hard year, these travelers want to experience FUN. They want to relax. **37% of Eager Travelers are willing to pay more for luxury.** Anyone looking for an upgrade?

TAP INTO THEIR TOP INTERESTS: WHY DO THEY TRAVEL?



38% of Eager Travelers cite **ADVENTURE**



42% of Eager Travelers cite **ENTERTAINMENT**



19% of Cautious Travelers cite **EDUCATION AND CULTURE**

39% of Cautious Travelers cite **HOBBIES**

32% of both groups enjoy visiting new destinations in addition to their regular spots. They aren't against returning to the same exact beach house year-after-year, but they're also interested in exploring.

SHOULD AIRLINES KEEP MIDDLE SEATS EMPTY?



Nearly 30% say they'd want to see forced social distancing in order to get on a flight.



The Eager Traveler is 16%

more likely to vacation in Cape Cod, MA



The Cautious Traveler is 10%

more likely than the average American to head West to destinations like Yellowstone and Jackson Hole

Cautious Travelers are

16%

more likely than the average American to book a trip based on safety. That's never been more important than now. Focus on precautions, precautions, precautions.

WILL WE SEE A DIFFERENCE IN LEISURE V. BUSINESS TRAVEL RECOVERY?

33% of Americans believe leisure travel will recover by August 2021.
29% say the same of business travel.

Additionally, business travel spending saw a 70% decline in 2020, while leisure travel only declined 30%. That's a big gap¹ to make up—and, for travelers focused on values including nature and excitement, there may be less desire to resume the work travel grind.

¹Johnson, Bradley. 2021, Mar 18. How Travel Ad Spending and Revenue Tumbled More Than 60% in 2020, and Why Industry Sees Recovery on the Horizon. <https://adage.com/article/datacenter/how-travel-ad-spending-and-revenue-tumbled-more-60-2020-and-why-industry-sees-recovery-horizon/2322166>.

LOYALTY

BOOKING THE NEXT TRIP

Once that first trip has been taken and travelers are feeling confident that, okay, that wasn't so bad, it's time to book the next. How do these travelers respond to loyalty? Given that almost half of each group hasn't stayed in a hotel in over a year and 66% haven't gotten on a flight, rebuilding loyalty may not be as simple as reminding them of their miles waiting to be redeemed.

We're right back where we were: nearly a quarter of both Eager and Cautious Travelers list best price as a top consideration when booking a flight and over 40% say price range is a top consideration for hotel stays. Deals, deals, deals. Getting these travelers back on board is going to come down to tempting them with deals. So, when you're thinking loyalty: how can you tie in bookings with future booking and redemption opportunities? **This might be the time to break out that stay once, stay twice, get a third stay free deal.**

16%

of both groups list non-stop flights as a top selection consideration

WHEN STAYING AT A HOTEL, THEY WANT THESE PERKS



While Eager Travelers are slightly more likely than the average American to book with a travel site based on loyalty points earning, Cautious Travelers are actually less likely. However, when it comes to choosing a hotel brand for a stay of a week or less, those data points swap. Could this be related to Eager Travelers booking through travel sites to find deals, while Cautious Travelers are a bit more...well, cautious, and prefer to go straight to the source?

Tailor your messaging accordingly. When you're running ads on travel sites, appeal to the adventurous Eager Traveler, while you can choose to emphasize safety and a more judicious approach on your hotel's site.

Eager Travelers are **9%**

more likely than the average American to have a travel rewards card as their primary credit card



CONCLUSION

THE FUTURE OF TRAVEL



So, what's next?

As travel marketers navigate who's likely to book a quick overnight one state over and who's itching to jump on a plane to cross the country, it will be critical to target messaging based on readiness.

Resonate's fresh, accurate, granular data uncovers your ability as a marketer to target individual humans and connect with them on a deeper level—one that makes them feel seen, heard, and, most of all, cared about during a season when anxieties are running high, yet we're also

IN NEED OF A...VACATION.



ABOUT RESONATE

Resonate is a pioneer in A.I.-driven consumer data & intelligence. The Resonate Ignite Platform™ seamlessly enriches any data with the deepest understanding of the U.S. consumer and then integrates into the marketing ecosystem to drive insights into action. Resonate Elements, our proprietary consumer data set, has more than 13,000 attributes, including the Human Element that describes why consumers choose, buy or support certain brands, products or causes. Hundreds of leading brands and agencies use Resonate to better understand their customers and prospects and power decision-making from strategy and execution to drive growth and revenue across the customer lifecycle.

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