

Brand Reckoning 2020:

How COVID-19 Is Transforming Traveler Behavior, Loyalty and Values

A look at consumer attitudes and actions related to travel to uncover the trends, shifts and insights driven by this phase of nonstop disruption.

It's not you, it's me. Wait, it's you.

87% Don't trust fellow travelers to follow safety guidelines

35% Don't trust airlines to provide a safe experience

25% Don't trust hotels to provide a safe experience

Familiar faces might be the key.

57% Say COVID-19 has made traveling with close friends more likely

64% Of parents say COVID-19 has made traveling with their children (and adult children) more likely

74% Cite COVID-19 and recent social justice protests as a reason for supporting brands that improve diversity and inclusion

Work travel can be a mixed bag.

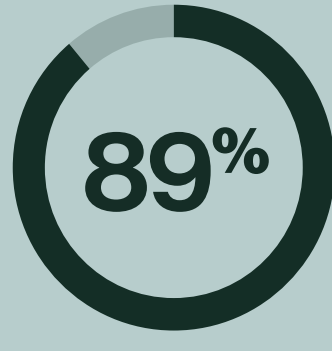
88% Of frequent business travelers agree: virtual meetings have proven most business travel unnecessary

68% Overall are less interested in travel for work

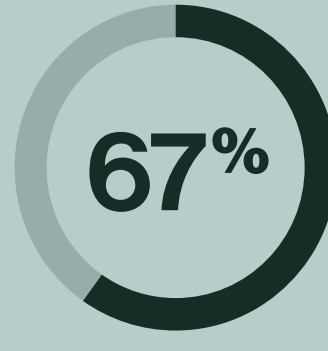
67% Are likely to incorporate remote work into travel plans (as part of their trip)

32% Are more interested in travel for work

We have become a little judgey.



Notice immediately when others don't follow safety practices



Expect to judge others for traveling before they themselves think it's safe



Expect to censor social media posts to avoid travel shaming

Meet the Transforming Traveler Personas.

We looked at where travelers are above or below average on two metrics: their openness to reengage and redefinition of values.



RETRO REENGAGERS

Ready to return to the world as it was

33% of travelers

Most likely to have kept their travel preferences consistent. Expect to prioritize travel more in the next year after not being able to and will likely travel in groups more. Most likely to believe we shouldn't have to wear masks in public and less likely to prioritize diversity and inclusion in choosing brands. Together with Open-Minded Explorers, they expect to have to self-censor to avoid being travel shamed on social media.



OPEN-MINDED EXPLORERS

Have new priorities as they return to a world reopening

22% of travelers

Most open to travel today. Twice as likely as average to be much more interested in travel for work as a result of COVID-19. Expect to travel more with their children, alone, or with close friends as long as they're back at it. Will seek travel deals, even if it means being flexible on location. More likely to be urban and highly educated and prioritize diversity and inclusion in their brand choices.



WORRIED WITHHOLDERS

Not easily influenced; they prefer their comfort zone

20% of travelers

The oldest persona and largely distrustful of others, with major hesitations in returning to travel and significantly less interested in work travel. Expects that COVID-19 will impact the types of activities they do on vacation. Least likely to have had their employment status change as a result of COVID-19. Least likely to have changed their brand preferences. Considers advertising less influential now than prior to COVID-19 so earned/news is key.



CAUTIOUS QUESTIONERS

Keeping their distance until they know more

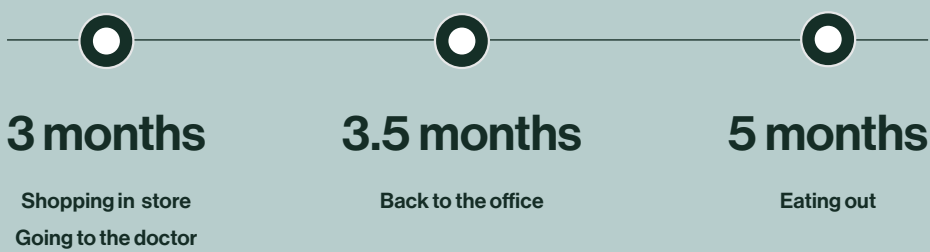
25% of travelers

Most likely to have experienced the most disruption to their travel plans. Most at risk with underlying health conditions and 19% less likely to keep the same travel preferences as before the pandemic. Twice as likely as average to feel very uncomfortable visiting shared spaces. Much like Worried Withholders, they probably won't be changing brand preferences given the pandemic but are most likely to feel positive about destinations and travel brands that prioritize diversity and inclusion.



What's the timeline for reengagement?

Reengaging in daily activities



Reengaging in travel



Interested in receiving more findings from the Transforming Travelers study or sitting down to discuss how this can be valuable to you? Reach out!

Bettina Garibaldi
Senior Vice President, **Ketchum Travel**
bettina.garibaldi@ketchum.com

Check out our Ketchum Travel **Rebound Roadmap**. Responsible communications is a powerful vehicle that you should not be afraid to activate now, no matter where on the road to rebound you are.

Discover related insights about overall consumers and employees by reviewing our other studies in this series: **Brand Reckoning 2020 / Work Shift 2020**

Background/Methodology: Data based on results of a nationally representative online survey of 3,883 Americans aged 18+, conducted by Ketchum Analytics and fielded 6/14 - 6/23/2020.