



March 27, 2020

To Our Clients:

While the COVID-19 pandemic is surely affecting your personal and professional life in some way, your team at JNS Next wants you to know that we are here to help our amazing clients, such as yourself. We stand by our commitment to give you our unbridled support and resources to whatever degree is possible. We are all being impacted, but we will come out of this much stronger through communication, understanding and empathy. The below information has been compiled from many sources, webinars and examples of what we have learned and continue to learn over the last few weeks. We hope you can pull some pieces of this information to help your business and customers.

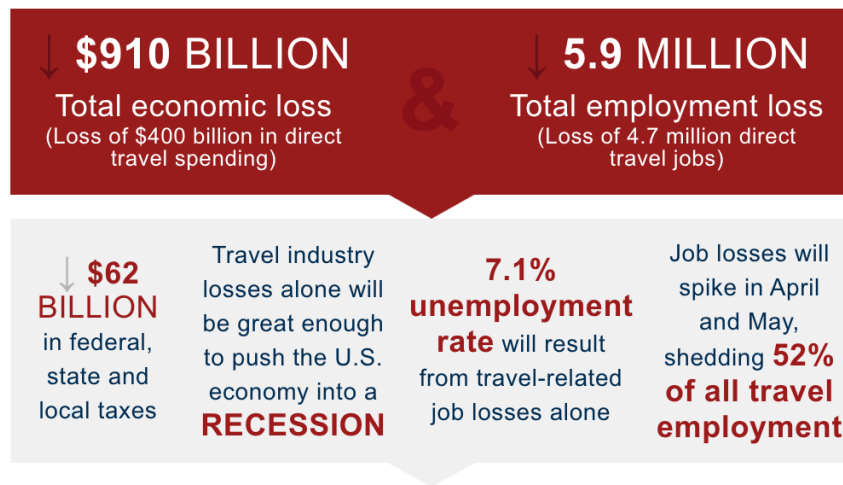
We continue to monitor this situation closely, and share insights from sources including the CDC, US Travel Association, Visit California, Cal Travel, Tourism Economics, Longwoods International, Destinations International, Adara, Sojern, Expedia, Centro, Comscore and more.

Please know that you can count on us and we are here for you.

Sincerely,
Your JNS Next Team



US Travel Association + Tourism Economics



More Than **7X** the Impact of 9/11

Updated March 24, 2020

Source: Tourism Economics

Weekly Coronavirus Impact on Travel Expenditures in the US - March 26, 2020

https://www.ustravel.org/sites/default/files/media_root/document/Coronavirus_WeeklyImpacts_03.26.20.pdf

Highlights:

- **National weekly travel spending dropped to \$7.7 billion last week, down from \$19.8 billion during the first week of March**
 - This equates to a \$14 billion loss in travel spending last week alone (when compared to 2019)
- As expected, percentage declines were most severe in the Northeast and West but were significant (59% or more) in all regions
 - The Northeast suffered a 72% decline in year-over-year travel spending last week, and New York state suffered a 77% decline (higher than any other state)
- Through March 21, travel spending losses for the month totaled \$23 billion



ADARA

March 25, 2020 Webinar Highlights:

Data-Led Approach to Recovery

← COVID-19 →

Macro Issues to Monitor

- Federal Policies
- State Regulations
- Outbreak Cases
- Recovery
- School Closings
- Commercial Impacts
- Health Systems
- CDC Updates

Micro Data to Watch

- Client Visitation Data
- Social Listening
- Search Trending
- Vendor Trending
- Future Forecasting by Traveler Type

What to Monitor Weekly

/ Search Demand

- Hotel + Flight
- Track YoY
- Watch Last 30 Days

/ Booking Demand

- Share of Wallet
- Trending by Market
- Future Stays
- Volume by Traveler Type

/ Booking Window

- Changes by Market
- Booking Window Lengths

Four Phased Comms Roadmap to Recovery

Broken down into key traveler behavior periods.

COVID-19 COMMUNICATION ROADMAP				
	Recovery			
	Wait	Ready	Set	Go
Traveler Truths	Quarantined & social distancing	Social distancing reduction and potential financial impacts	New normal	Traveling at a normal cadence
Traveler Motivators	Creating a new daily normal way of living and seeking outlets for the now	Returning to normal daily routines with renewed caution and experimenting with future travel plan	Adapting and proactively seeking an escape	Resuming normal travel plans
Brand Roles	Acknowledgement of circumstances (national); Rallying around community (local)	Understanding safety and health precautions; getaway solutions to break 'cabin fever'	Encouraging travelers to get out and explore	Connecting travelers with reasons to travel
Purpose	Maintain top-of-mind awareness	Drive awareness, consideration and visitation	Increase consideration & visitation	Encourage visitation and bookings
Messaging Strategy	Inspirational and reuniting post-crisis; Support community stories; Book now travel later	Inspirational & informational (safety, rates, etc); Bookings	Full-funnel	Full-funnel
Desired Action	Stay connected	Planning ahead and positive connections between traveler and brand	Get excited and making initial travel plans	Booking travel

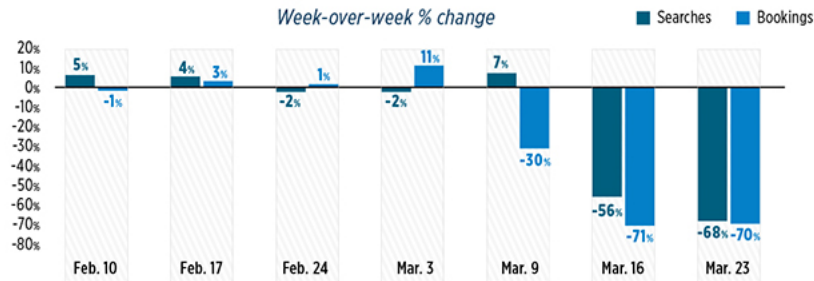


ADARA's Traveler Trends Tracker taps into real-time travel data to track travel-related consumer behavior. The data provides searches and bookings from the past week.

Live Results: <https://adara.com/traveler-trends-tracker/>

Highlight Slides:

Searches and Bookings for Travel To and Within the U.S.



Searches and Bookings for Travel To and Within the U.S.

Most recent week (March 23, 2020), compared to the previous week

	SEARCHES	BOOKINGS
	% Change from previous week	% Change from previous week
Total	▼ -67.6%	▼ -69.6%
Domestic	▼ -66.0%	▼ -67.9%
International	▼ -77.0%	▼ -83.1%

Longwoods International Research Travel Sentiment Study

Updated March 24

Highlights:

- 75% of travelers are changing their travel plans for the next six months because of coronavirus, up from 58% a week ago
- 48% said they would cancel some trips, up from 28% a week ago
- 18% will change their destination so they can drive instead of fly (from 30%)

Link: <https://longwoods-intl.com/news-press-release/covid-19-travel-sentiment-study-wave-2>

Global Business Travel Association:

2020 Membership Poll

- 96% of respondents cancelled a "FEW" to "ALL" domestic business trips (from 43% from a week ago), while 99% of respondents cancelled a "FEW" to "ALL" international business travel (from 87% a week ago)
 - 36% cancelled ALL of their domestic business travel (from 3%)



- 69% cancelled ALL of their international business travel (from 20%)
- Nearly three-fourths (73%) of respondents said that coronavirus would have a significant impact on their business (up from 40%)

Full poll results link: https://www.gbta.org/Portals/0/Documents/GBTA_Coronavirus-Poll-Results032320.pdf

Destinations International

Global Map Visualization of the Virus and Facts:

<https://destinationsinternational.org/covid-19-facts-visualization>

Wednesday, March 25, 2020 Weekly Coronavirus Industry Update Webinar

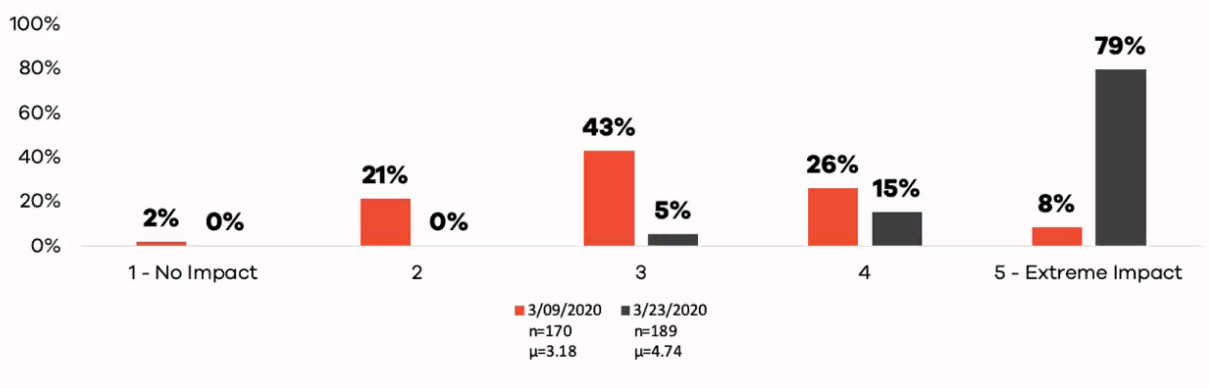
<https://destinationsinternational.org/covid-19-webinar-center>

Highlight Slides:

Expected Impact of Coronavirus on Tourism Economy

/Key Finding 1

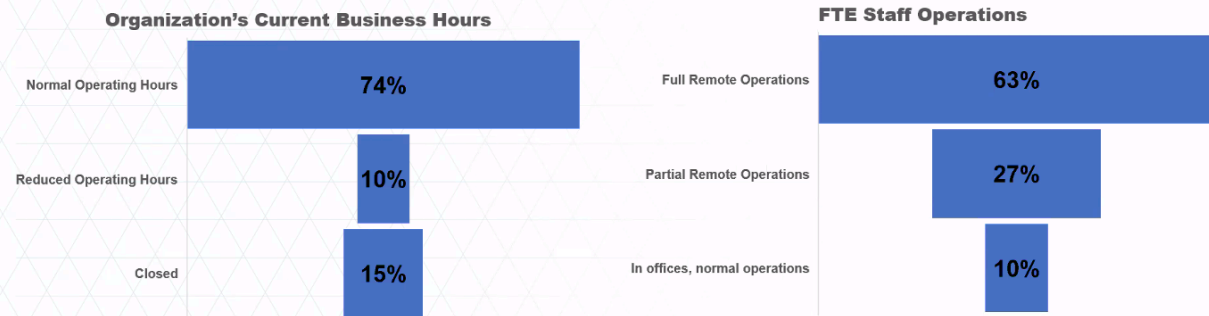
The expectations destination organizations had of the coronavirus (COVID-19) on local tourism economies went from a sense of uncertainty in Wave I to a strong expectation of extreme impact over the next 6 months in Wave II.



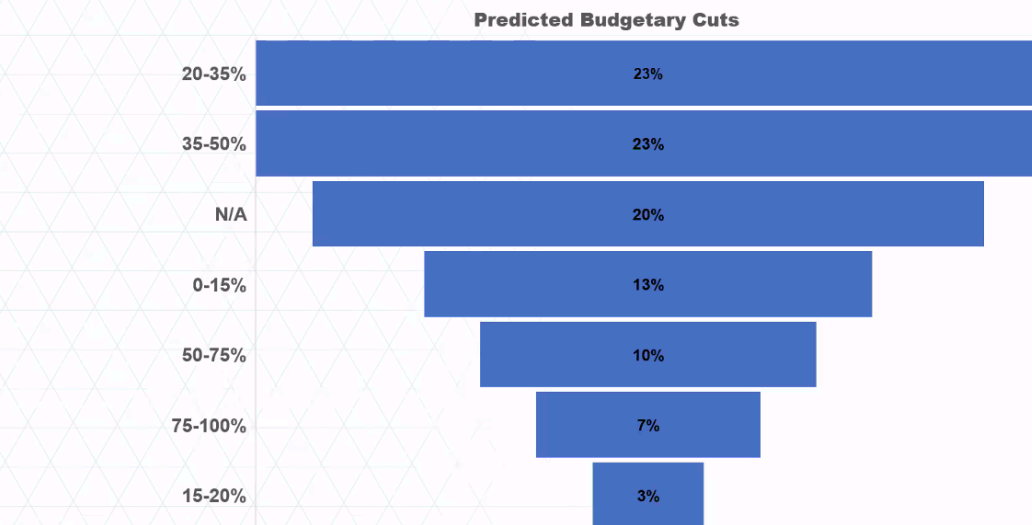


Recording

Operations of Destination Organizations Globally



Estimated % budget cuts for their immediate future



DESTINATIONS
INTERNATIONAL

iHeartRadio

With consumers spending more time at home, iHeartRadio digital has seen phenomenal growth.

- In the last week alone, iHeartRadio Digital users grew by 21% at home.
- Top 3 smart speaker (Alexa/Google Home/Sonos) listeners were up +30%
- Web listeners were up +20%
- Smart TV listeners are up +23%



Consumers are connecting more with on-air personalities on social media.

- Our listeners social engagement with iHeartRadio personalities has surged in the past 2 weeks.
- Engagement with iHeartRadio personalities is up +19%
- Social sharing of iHeartRadio's content is up +97%

Consumer's search behavior reveals their reliance on iHeartRadio to stay connected and informed. Searches for iHeartRadio, Radio and smart speakers are all up week over week.

- Google Search Volume for "iHeartRadio" increased 20%
- Google Search Volume for "radio" has increased 5%
- Google Search Volume for "Smart Speakers" has increased 2x

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Berkeley's Leadership Pep-Talk for DMO Destination Managers

March 17, 2020 - Highlights

Advertising Strategy:

- First month - messaging should focus on the hospitality industry caring for residents, workers and travelers.
- Second month - be prepared to push out positive travel messaging at the first sign that people are getting back to a normal routine.

Crisis Timeline:

Phase 1 (Now):

- Pull travel advertising or change the message. You don't want to appear insensitive by asking people to travel when leaders are asking people to stay home. Plan and prepare advertising to launch as soon as you hear that the number of COVID-19 cases is in decline. Pause, Play later.
- PR is critical - this is no time to cut PR. Ramp it up!



- Maintain social media presence. Once people are settled in at home encourage them to share their favorite travel stories.

Phase 2 (two-three weeks)

- Once Americans have settled-in to the routine of staying isolated is when we start messaging about the joys of travel past (sharing) and the opportunity to plan for the future.
- Increase in external social media messaging. Encourage people to share stories and pictures and videos of their favorite trips and places.

Phase 3 (returning to normal)

- Once the number of cases is in decline, people can start planning to go back to work and public gatherings can be rescheduled. Time to start booking travel.

Sojern

Resources blog: <https://www.sojern.com/blog/>

Comscore Data

[Comscore Coronavirus Insights](#)- Comscore will be providing ongoing updates on shifting consumption trends and the resulting impact on the advertising and media industries

- **NEW** - [U.S. TV Viewing Is Increasing During the Coronavirus Pandemic](#): We identify several TV viewing trends to watch as Americans turn to their televisions as a core source of news, information and entertainment.
- **NEW** - [In-Home Data Usage Increases During the Coronavirus Pandemic](#): A look at surging average in-home data usage so far in March 2020 with an analysis across devices.
- [Media Consumption during the Coronavirus Pandemic](#): A top-level look at how the COVID-19 pandemic is affecting audience and consumer behavior across platforms, including digital (retail, news, travel and government) and national/local TV.
- [In Uncertain Times, People Turn to Local News](#): Why we need local news in times of crisis to learn about the changes impacting our daily lives.
- [Comscore Launches Brand Suitability Protections for Coronavirus Content](#): New contextual targeting filters give brands the tools to protect themselves from unwanted association with the global health crisis created by COVID-19.
- [Comscore's Monthly New Vehicle Demand Index Analyzes the Impact of COVID-19 on the Auto Industry](#): Auto manufacturers begin launching initiatives to entice shopper engagement.

RESOURCES

Local Coachella Valley Community Support Campaign:

STAY IN. TAKE OUT. - Support our community and restaurant businesses through this challenging time by ordering take-out meals and delivery. Greater Palm Springs restaurants offering delivery or take-out are featured on dineGPS.com, including restaurant Partner deals and special offers.

SENIORS FIRST - During this challenging time, many Greater Palm Springs grocery stores have set aside specific hours for at-risk customers as well as shoppers ages 65 and over. Grocers valley-wide are working around the clock to best serve the evolving needs of our local community. The CVB is keeping a list of grocery stores offering senior shopping hours [here](#).

CalTravel Resources - Business and employment support, public health, research <https://www.caltravel.org/covid19-industry-resources>

SBA Loans

oesnews.com/covid-19-small-business-supporter-update/

Facebook Small Business Grants Program

Facebook is offering \$100M in cash grants and ad credits for up to 30,000 eligible small businesses in over 30 countries where we operate. We'll share more details as they become available.

Examples:

- Keep your workforce going strong
- Help with your rent costs
- Connect with more customers
- Cover operational costs

Link: https://www.facebook.com/business/grants?content_id=KKf6RWdyo87L7QO

INSPIRE - See the collection of inspiration and campaigns JNS Next has found:

Conde Nast Traveler - Believe In Travel | March 13, 2020

"Whatever choice you make about whether to take a trip right now, it's important to remember that travel is also a state of mind, and that you don't necessarily have to go far away to feel far away. And no matter what you do right now, don't forget to dream about that next big trip, because the time will come when the answers are clearer and the future more knowable, and when it does, travel will be what helps us start moving forward again."

<https://www.cntraveler.com/story/we-still-believe-in-travel>

Lead. From. Home. | March 24, 2020

https://twitter.com/thesis_agency/status/1242517356833726464?s=21

Visit Las Vegas - the only thing that matters is you. | March 17, 2020

https://www.youtube.com/watch?v=3x0QVIKnjRE&fbclid=IwAR38qKuEY40kT1Um7Q1id8exKAUkColyo0LVsvnQaZ8CcPTZ4QdSn8_tQ4c

Skift - Highlights tourism marketing success stories amid COVID-19. | March 19, 2020

<https://skift.com/2020/03/19/tourism-marketers-enter-wait-and-see-mode-to-avoid-tone-deaf-campaigns/>

TravelZoo - 20 Amazing Places You Can Visit From Home

<https://www.travelzoo.com/blog/20-amazing-places-you-can-visit-without-leaving-home/>

Cowboy Museum Goes Viral on Twitter with Messaging

<https://www.cnn.com/2020/03/24/us/cowboy-museum-oklahoma-security-twitter-trnd/index.html>

Advertising:

Forbes ["Why Companies Turn To Digital Marketing to Survive COVID-19"](#)

AdExchanger ["In The Face Of An Economic Downturn, Programmatic May Be Well Positioned"](#)

ClickZ ["B2B turns to digital marketing in the wake of coronavirus outbreak"](#)

Live TV Viewing: <https://www.comscore.com/Insights/Blog/US-TV-Viewing-Is-Increasing-During-Coronavirus-Pandemic>