

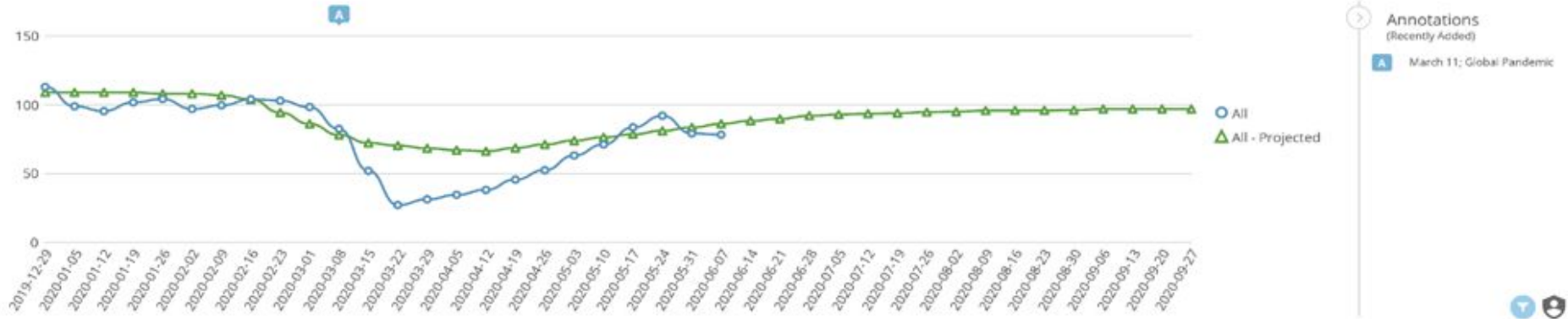


Google + Madden Marketing Recovery Insights



Travel Intent Tracking

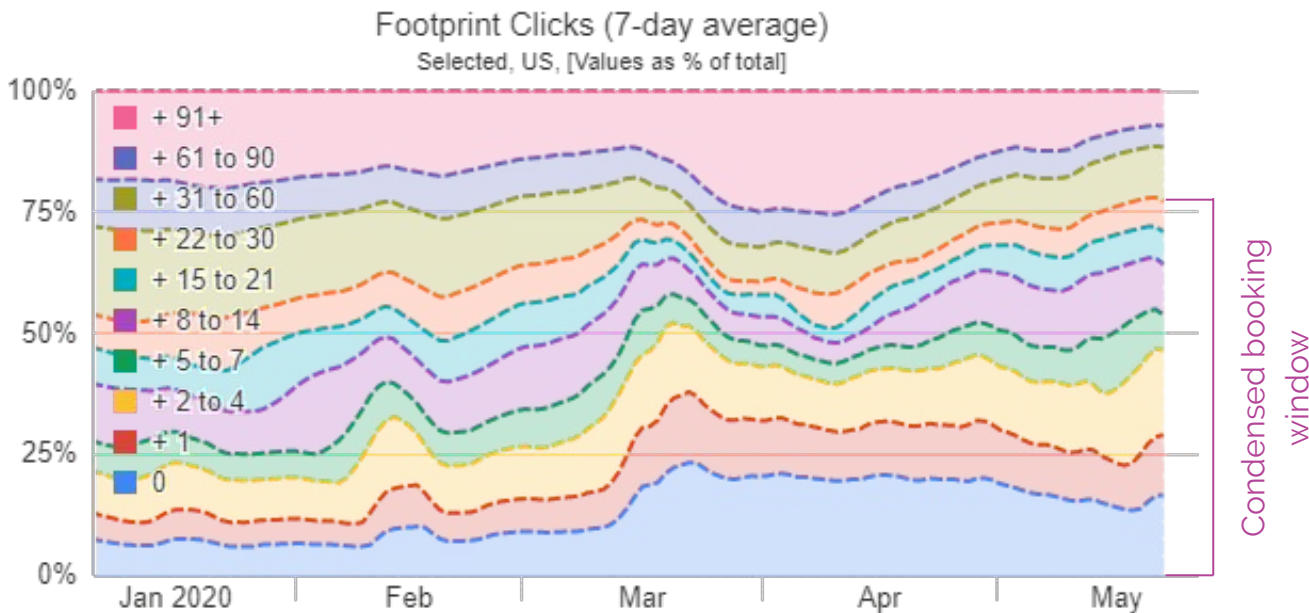
Travel Intent - Index Over Time
by Week



Source: Madden Travel Index

- Goal: Know when consumers return to the inspiration and planning phases
- Forecast looks at expected trend data
- Index composed of organic traffic, marketing engagement, and consumer search trends

Traveler Booking Activity



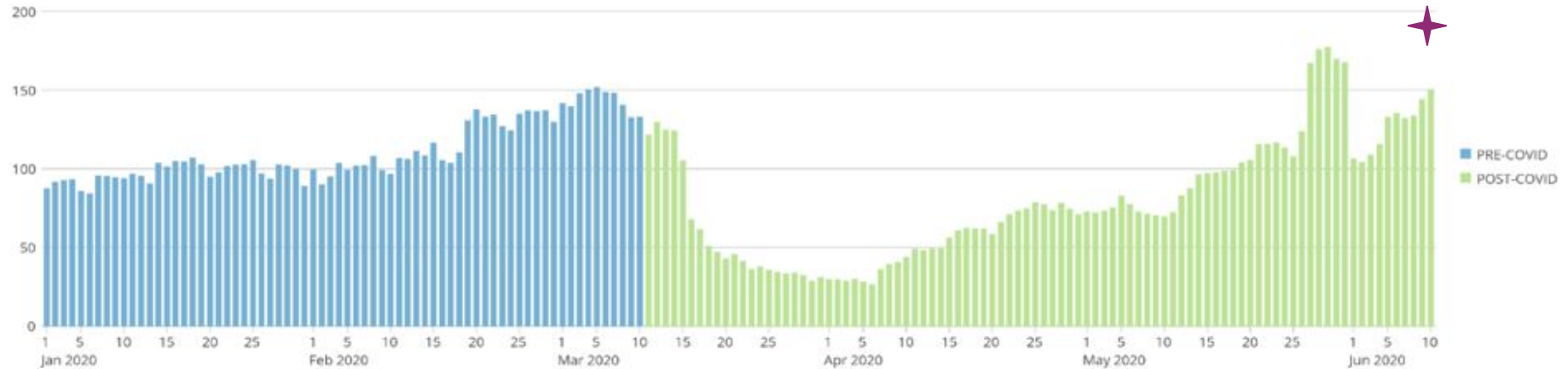
Source: Google (Internal)

Key Takeaways

- Condensed booking windows, people are booking closer to time to travel
- Last-minute travel bookings <7 days still significantly above the norm
- Marketing needs to meet consumers where they are in their booking windows

DMO Media Spend Index

DMO Media Spend Index
by Day



Source: Madden Travel Index

- Media Spends returning to norms prior to recent protests
- Media Performance where media was not stopped is outperforming paused media campaigns
- Beginning a return to norms for summer travel spending

A photograph of three people walking along a sandy beach at sunset. On the left, a young man in a blue long-sleeved shirt and grey shorts carries a surfboard with blue and white diagonal stripes. In the center, a young woman in a blue long-sleeved shirt and red and white striped shorts carries a white surfboard and is smiling. On the right, a young man in a white shirt and blue shorts carries a white surfboard. The ocean is in the background with gentle waves, and the sky is a mix of orange, pink, and blue. The bottom of the image has a solid purple overlay.

Google Recovery Insights

Tatiana Schafer

Tatiana Schafer

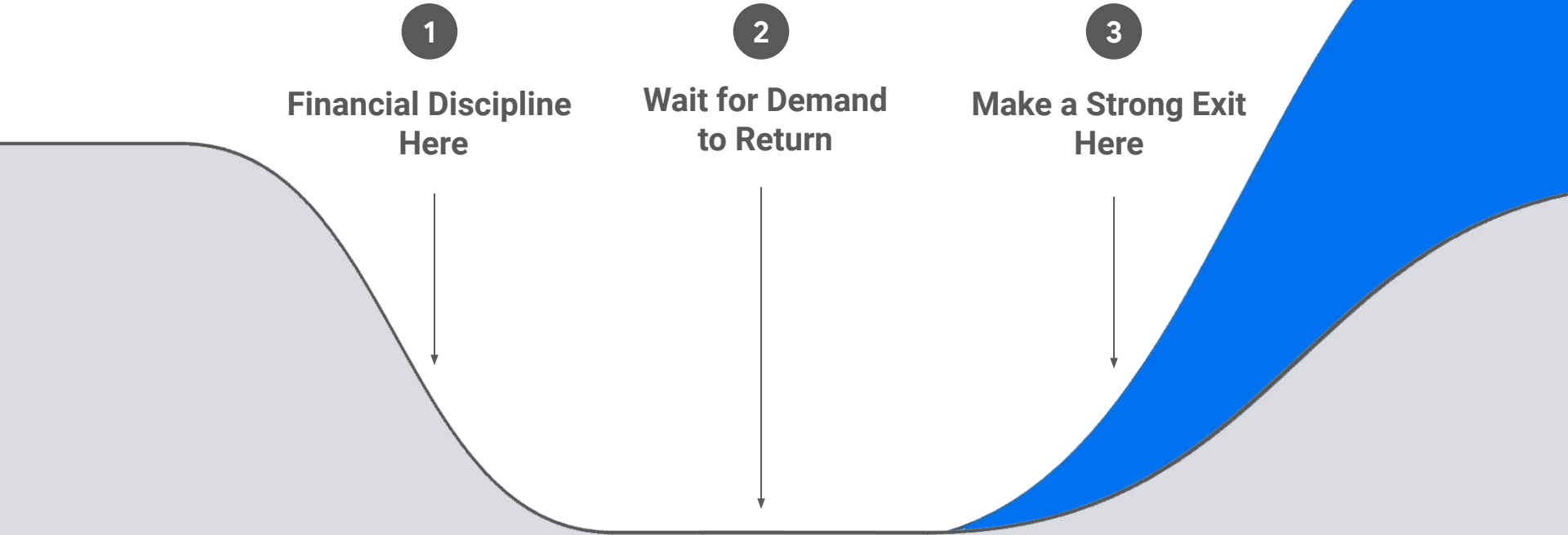
Strategic Partner Manager



- Joined Google in 2018
- Based in new Playa Vista/Los Angeles office in Spruce Goose Hangar
- Originally from Minsk, Belarus and bilingual in Russian
- Covered media and tech for 10+ years as an investor and operator
- Wharton Undergrad '10, HBS MBA '15

The path forward is paved with
uncertainty

COVID broke the standard formula for unlocking long-term business growth through a downturn



The biggest opportunity for what's next
is to solve for what matters right **NOW**.

Future-proof your business while you capture growth in real time

Future-proof your business



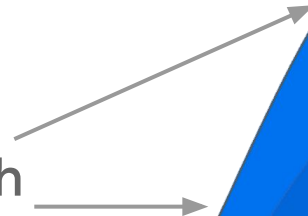
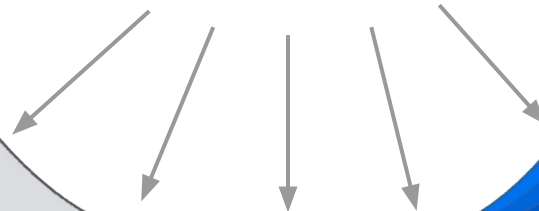
Grow share of wallet from existing customers

Move lifetime value from loyal customers

New revenue from new business models and lines of business

New customers in new markets

Capture growth in real time



01**Take action early**

to recognize sudden shifts in consumer behavior and lay the foundation for a strong recovery.

02**Monitor leading indicators**

to help capture dynamic demand.

03**Accelerate digital transformation**

to help build long-term business resilience.

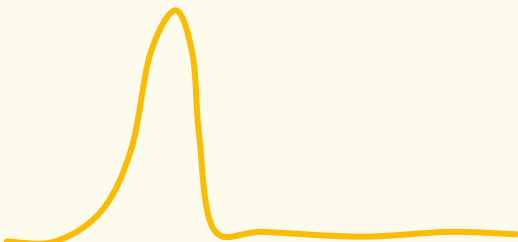
01

Take action early to recognize sudden shifts in consumer behavior and lay the foundation for a strong recovery.

We have early insight into how people's needs and behaviors might evolve as they seek to regain a sense of balance

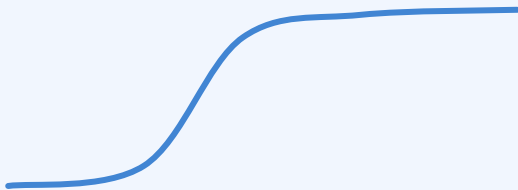
Shock

Sudden change in behavior,
unlikely to sustain



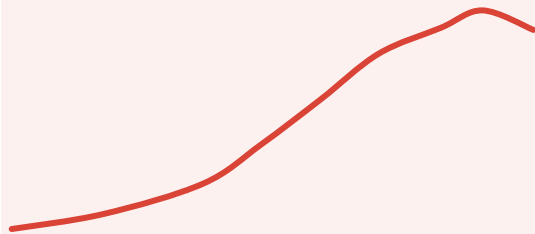
Step-change

Sudden change in behavior,
may sustain



Speed up

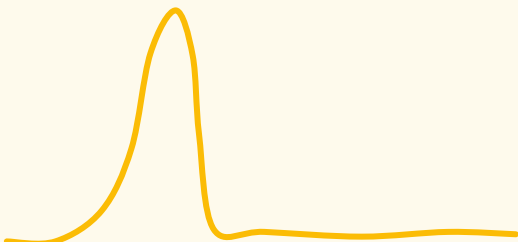
Acceleration of existing behavior,
may sustain



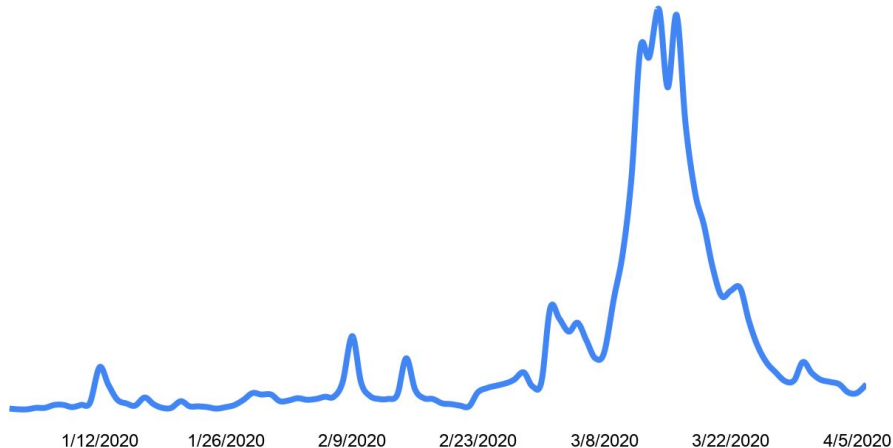
For travel, we saw 'cancellations' were up ~40x in March compared to January 2020

Shock

Sudden change in behavior,
unlikely to sustain



Travel cancellation related queries

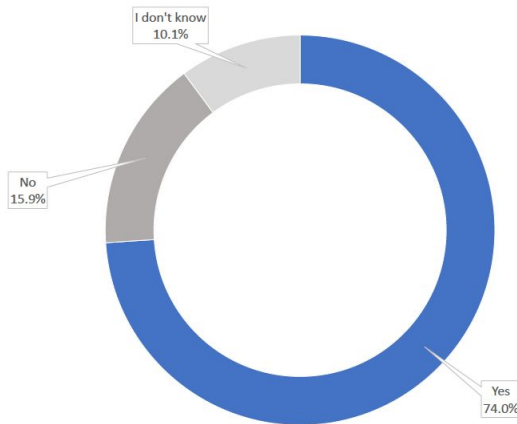


Importance of Information



Question: Before your next leisure trip, will you research how the destination and/or its businesses are managing the Coronavirus situation?

(Base: All respondents with plans to travel in 2020, 772 completed surveys. Data collected May 15-17, 2020)



Question added in Wave 10

Source: Destinations Analysts, Wave 10

Key Takeaways

- Create content that reinforces best practices for cleanliness
- Community pledges for cleanliness
- How your community has responded, both the history and the current environment

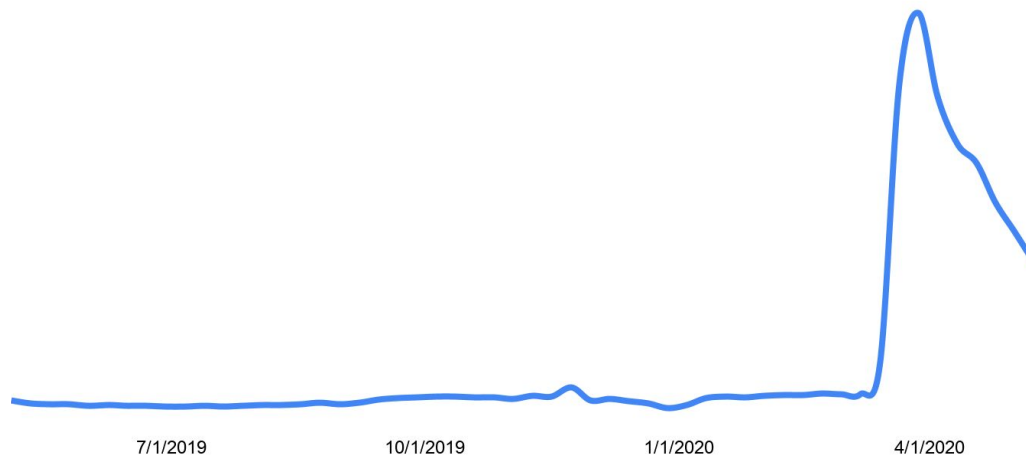
Searches related to 'virtual tours' have grown 20x since March

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Virtual Tour Queries

Step-change

Sudden change in behavior,
may sustain



Destinations and brands are responding with new digital experiences

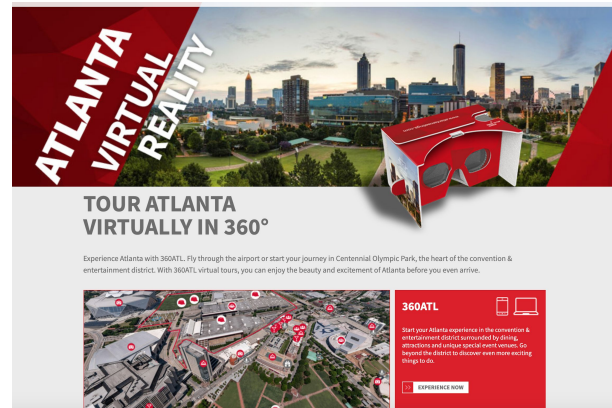
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Virtual Tours



Tourism boards are offering digital tours to 'leave home without actually leaving the couch'.

Virtual Experiences



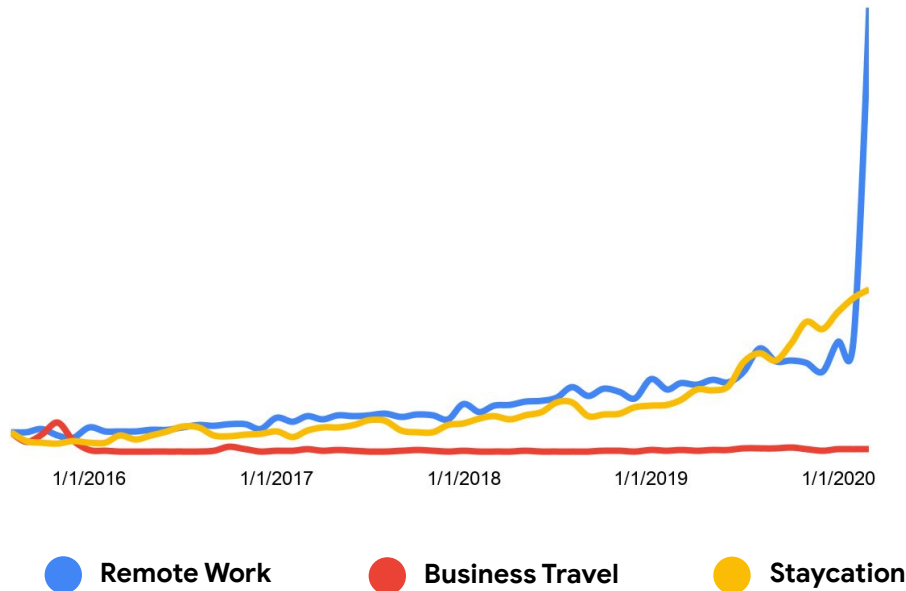
Growing engagement with meetings planners through virtual fam tours

Travel marketers should plan their response to potential new realities

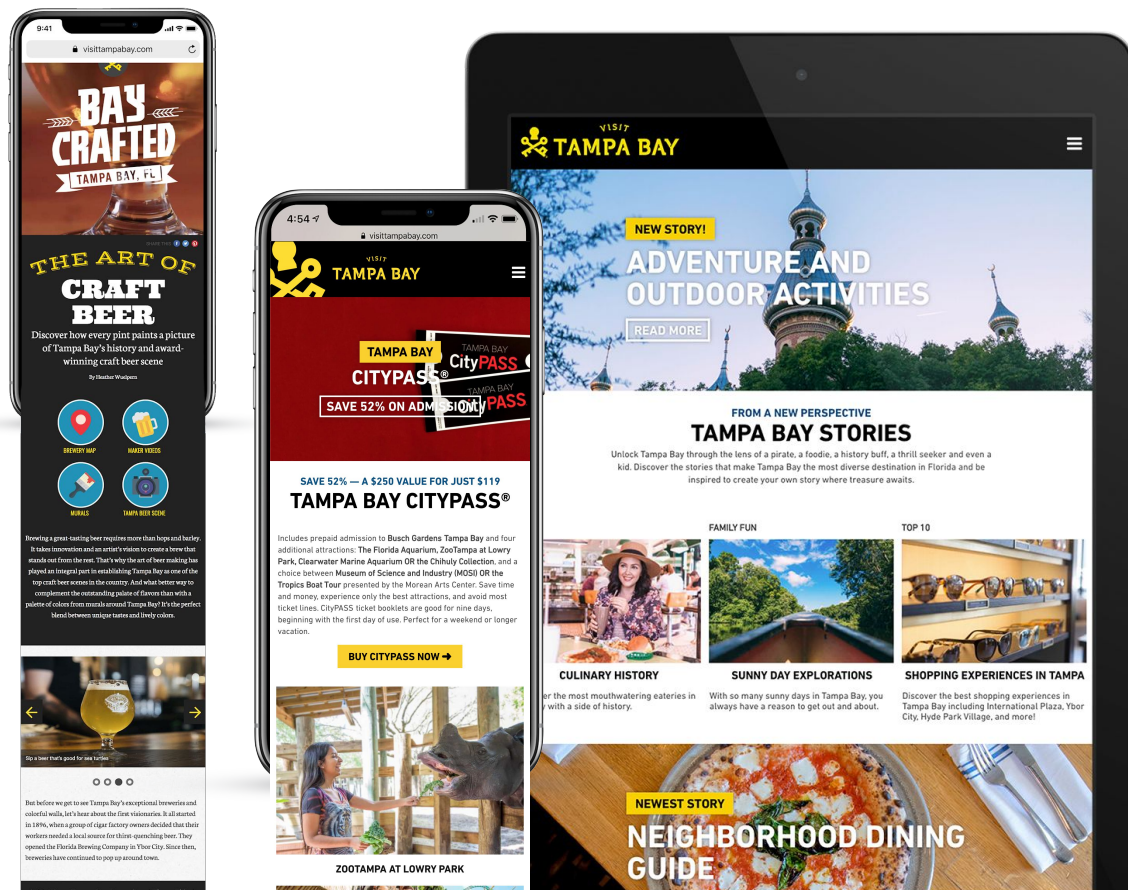
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Speed up

Acceleration of existing behavior,
may sustain



Increase Length of Stay



Key Takeaways

- Content to Drive Planning and Increased Spend In-Destinations
- Packages, especially for multi-day stays
- Current collaboration efforts with local businesses beyond hotels are going to be differentiators

Prepare: Considerations for marketers

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01	02	03	04
How do you ensure you have the right marketing objectives in place?	How can you best prepare for when travel demand returns?	Are you capturing existing demand and using it to better position yourself for when demand returns?	How can you ensure your go-to-market message will resonate with consumers?

Actions for marketers

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Action plan: Prepare for recovery

Key client opportunity

- Re-evaluate your marketing objectives

- Prepare for demand returning

- Leverage machine learning to address demand volatility

- Test new brand messaging and creative

How Google can help

- Align with your Madden Media team on any reimagined core objectives and determine a plan to partner.

- Assess your current account structure and align to Google Search [best practices](#); complete outstanding tagging; improve audience lists.
- Grow and leverage remarketing audiences.

- Implement auto-bidding solutions & keyword coverage to capture real-time demand.

- Run Google consumer surveys, leverage creative consultations and resources, or test creative through video experiments.

02

Monitor leading indicators and capture dynamic demand.

For travel, when demand returns, there will still be much at play

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Government / Regulator / Union

 Texas Tribune

Texas expands travel restrictions as coronavirus spreads

In Texas, Abbott said the state's first ad hoc health care facility to respond to the pandemic will be the Kay Bailey Hutchison Convention Center ...

1 month ago



 Travel Daily News International

ABTA warns lack of Government action on travel regulation ...

"Existing regulations are entirely unsuited to deal with this situation. We want to avoid the scenario of normally successful travel businesses ...

4 weeks ago

 PhocusWire

The coronavirus-triggered changes coming to travel payments

In the United States, there is no regulation around travel agency use of travelers' funds for operating expenses. Many travel companies use ...

5 hours ago



 Trailwatch (blog)

Canada's Provinces Introduce New Coronavirus Travel Regulations To Limit Domestic Travel

Canada's Provinces Introduce New Coronavirus Travel Regulations To ...
Canadians have always taken unfettered inter-provincial travel for ...

3 weeks ago



Consumer Sentiment

- Comfort in flying on airplanes or staying in hotels
- Cleanliness and safety of environment and facilities
- Regional differences in sentiment / interest
- Embracing of alternative travel options

Use leading indicators to understand consumer sentiment and when travel demand may return



Global
Search Demand



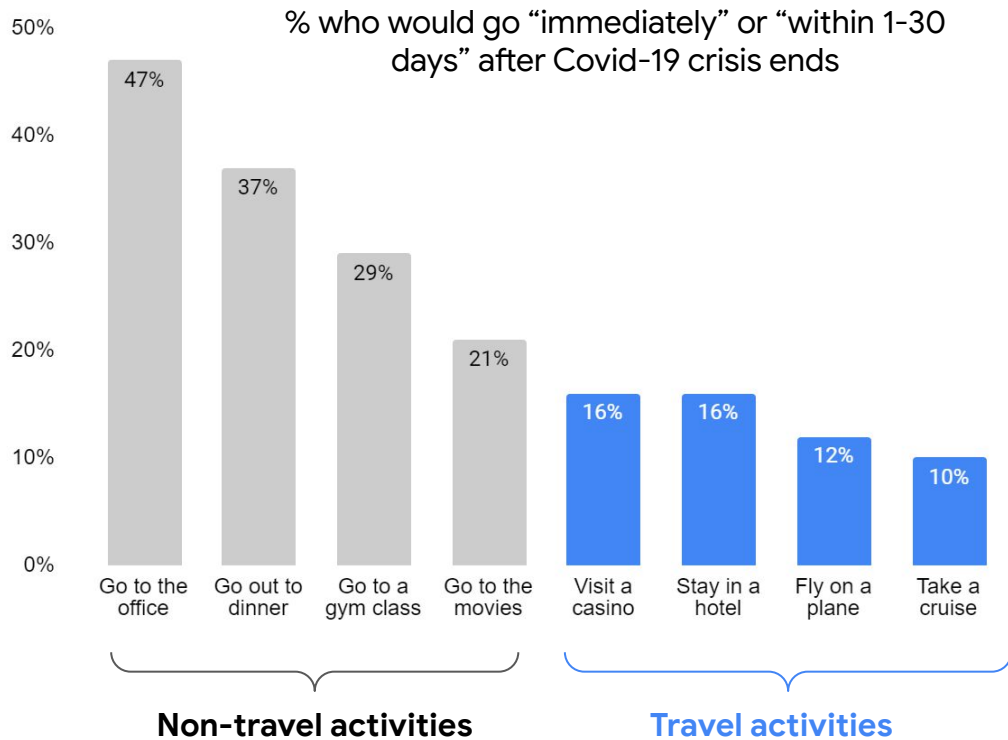
Google Maps Searches



Survey and
3rd Party Reports

Google signals across platforms

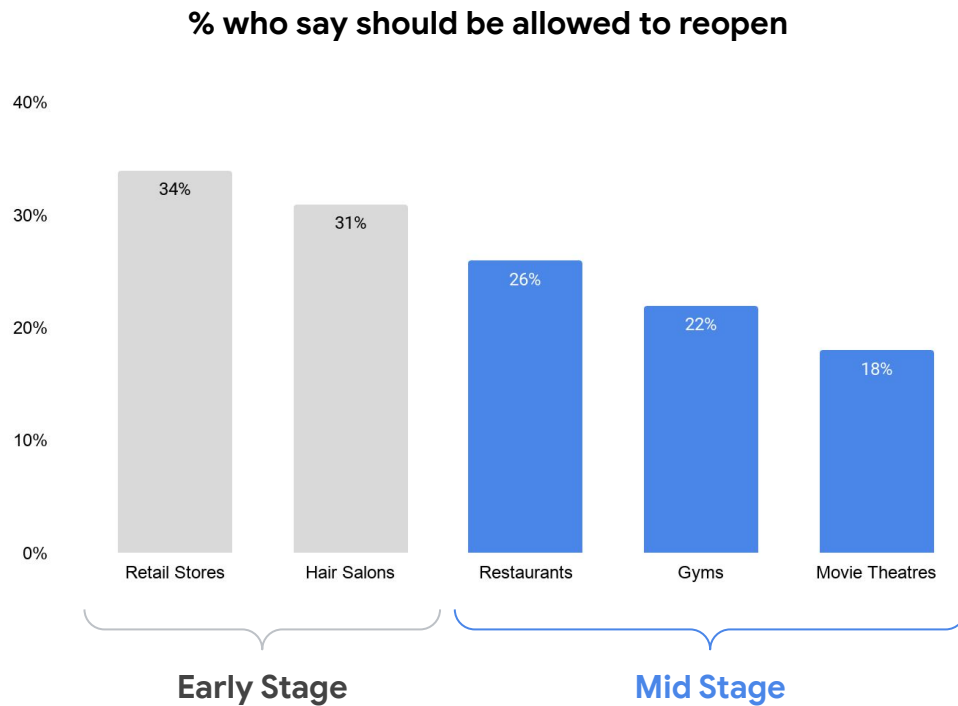
When the crisis is over, people will first return to work or go out to dinner, versus travel



What do you think is one of the
most important leading indicator
for travel demand returning?

The first places that will be reopened

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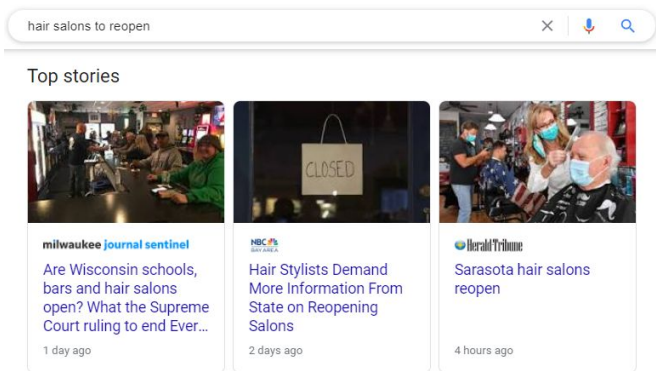
Maps show higher intent as it relates to actual movement

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Google Search

What consumers are searching for and obtaining information on

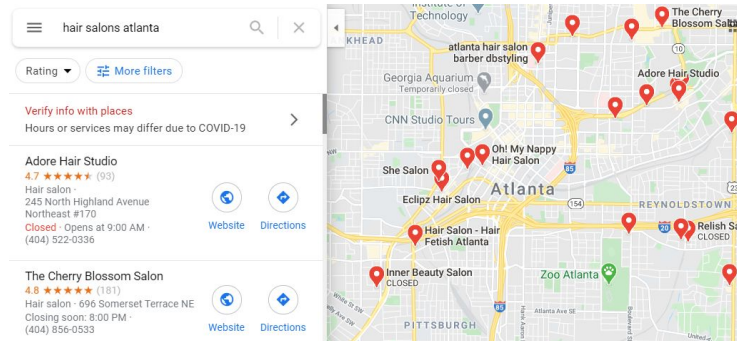
“hair salons to reopen”



Google Maps

Where consumers are looking to go and planning future trips

“hair salons atlanta”

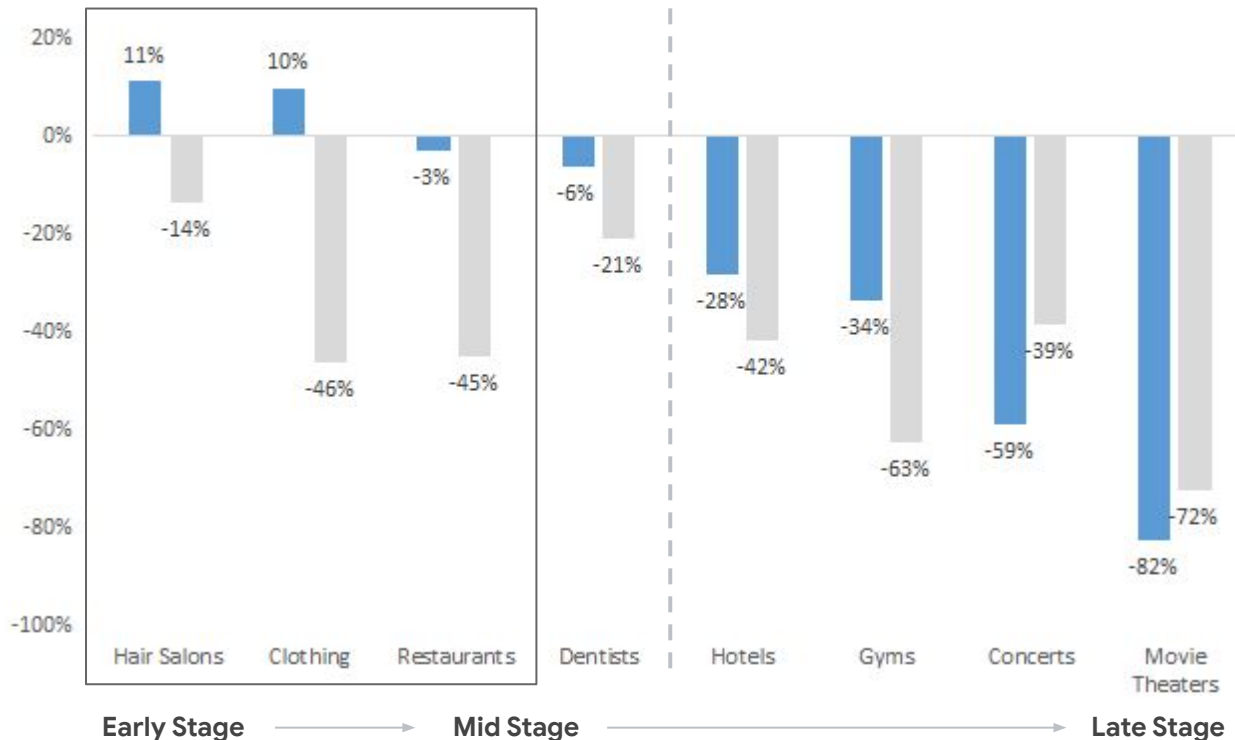


Hair salons is leading in intent for consumer movement

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Google Searches and Maps YoY

■ Searches ■ Maps



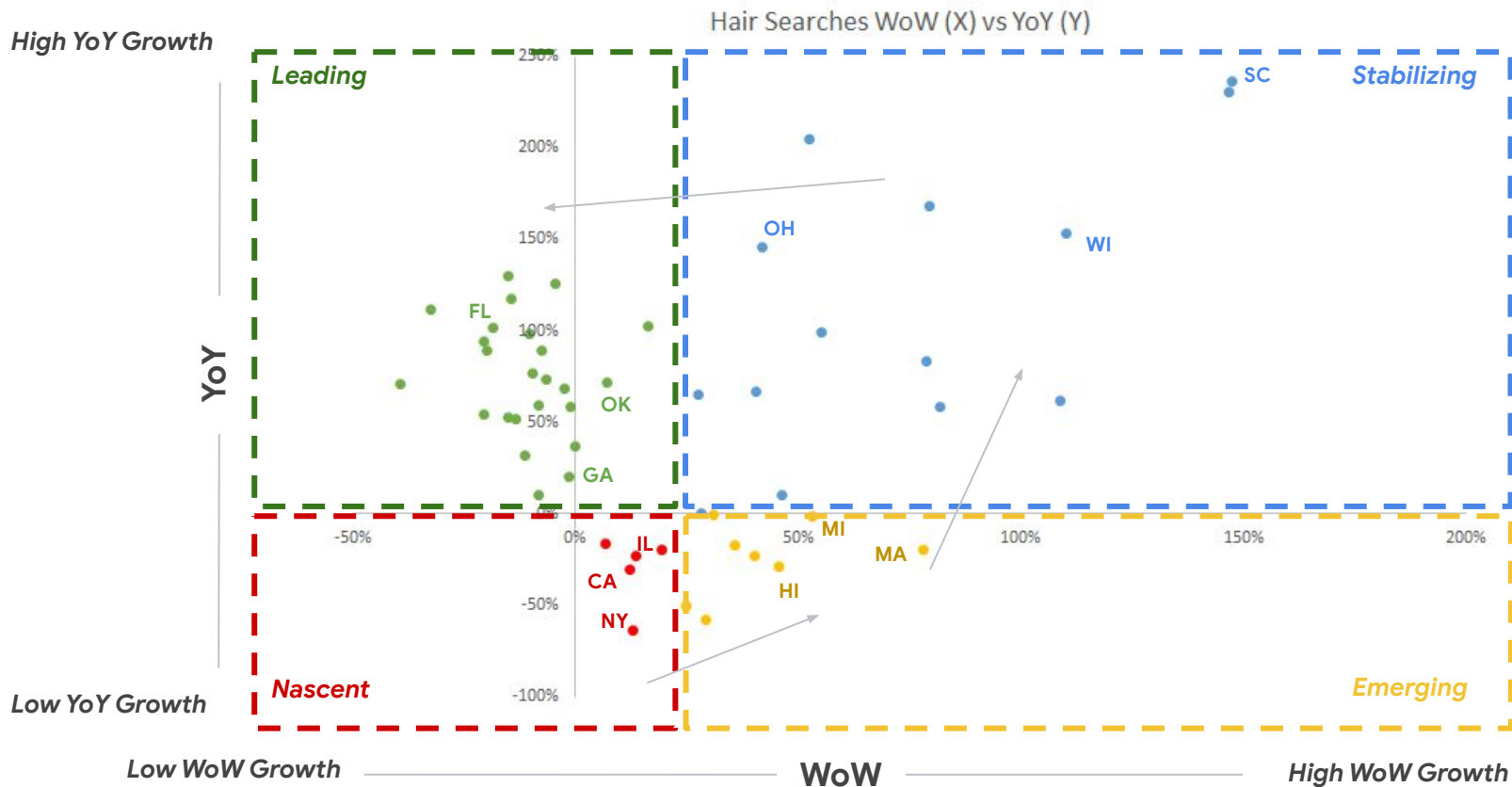
Map Searches are lagging Search

Difference most pronounced for clothing & restaurants

Analysis focus on Map Searches for hair salons and restaurants

Hair salons map searches by state

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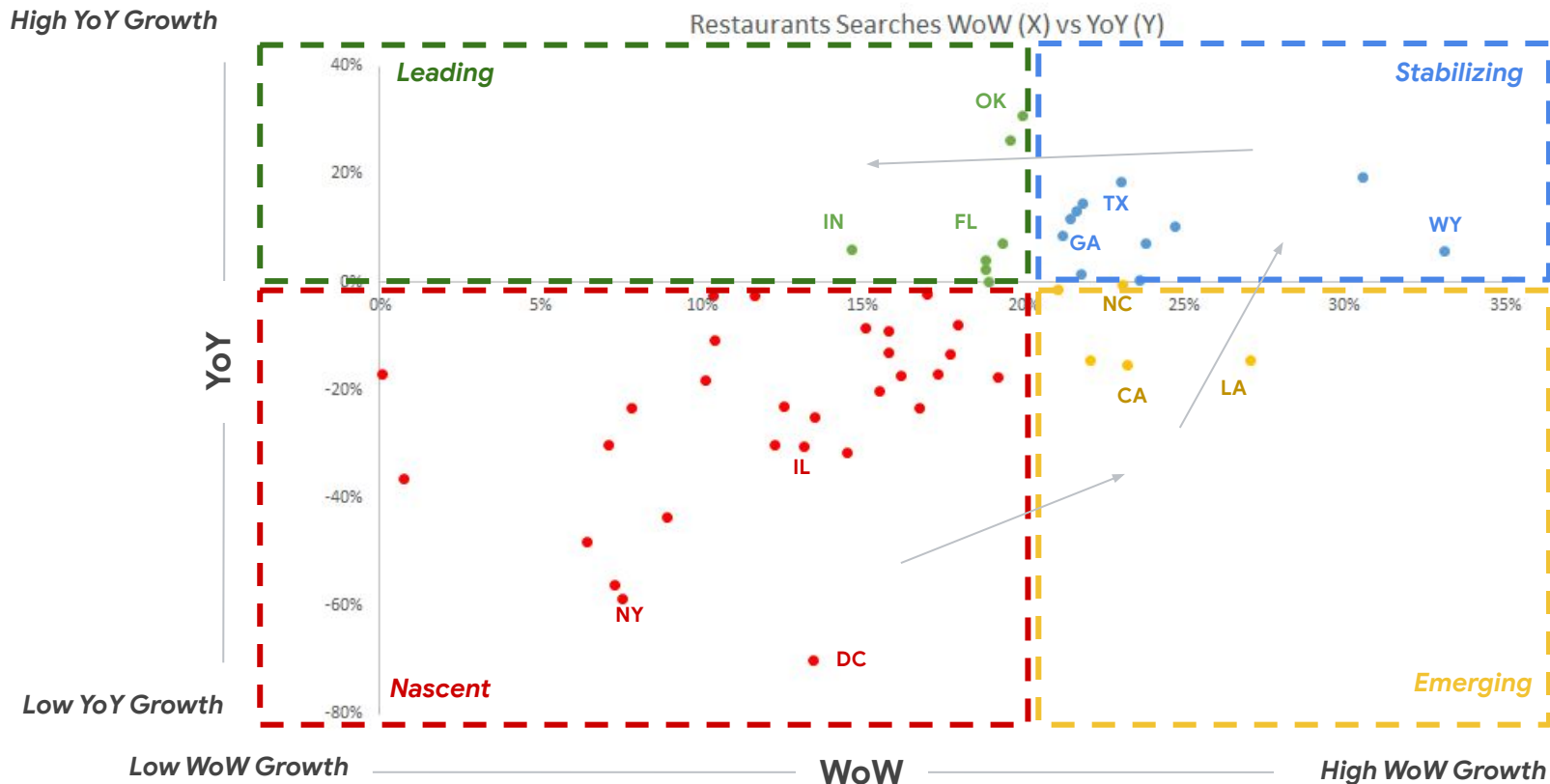


Source: Google Search Queries for Hair Salons (Maps), as of week ending 5/22/20

Google

Restaurant map searches by state

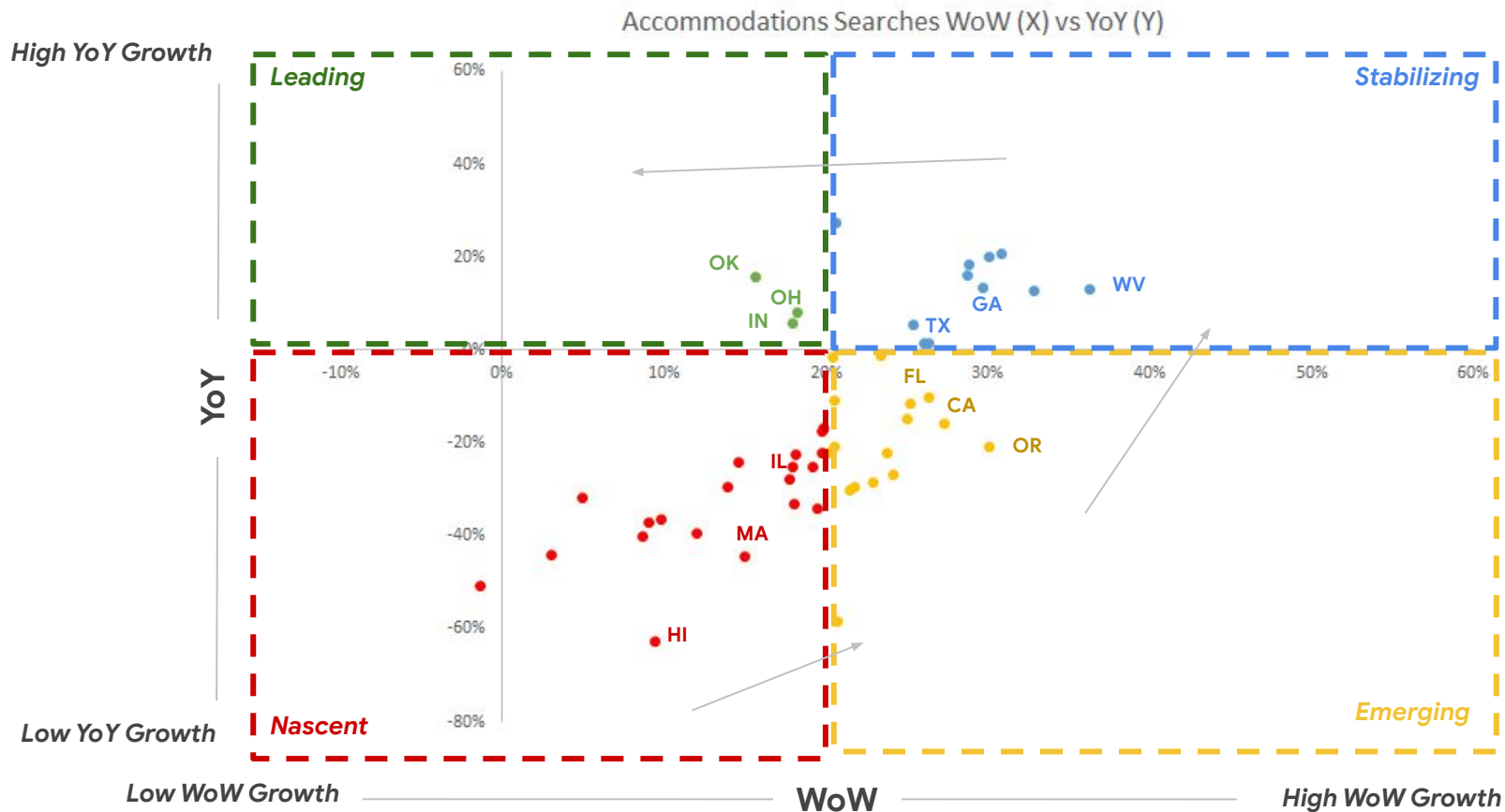
Proprietary + Confidential



Source: Google Search Queries for Restaurants (Maps), as of week ending 5/22/20

Accommodation searches by state

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Source: Google Search Queries for Accommodations (Search), as of week ending 5/22/20

Google

Consumer demand summary by state

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State	Hair Salons	Restaurants	Accommodations
California	Nascent	Emerging	Emerging
Texas	Leading	Stabilizing	Stabilizing
Florida	Leading	Leading	Emerging
New York	Nascent	Nascent	Emerging
Georgia	Leading	Stabilizing	Stabilizing
North Carolina	Stabilizing	Emerging	Stabilizing
Ohio	Stabilizing	Nascent	Leading
Pennsylvania	Stabilizing	Nascent	Nascent
Illinois	Nascent	Nascent	Nascent
Tennessee	Leading	Leading	Stabilizing
Virginia	Stabilizing	Nascent	Emerging
Arizona	Leading	Leading	Emerging
Michigan	Emerging	Nascent	Emerging
New Jersey	Emerging	Nascent	Nascent
South Carolina	Stabilizing	Stabilizing	Stabilizing
Washington	Emerging	Nascent	Emerging
Alabama	Leading	Stabilizing	Stabilizing
Louisiana	Stabilizing	Emerging	Stabilizing
Indiana	Leading	Leading	Leading
Missouri	Leading	Nascent	Emerging

Capture demand: Considerations for marketers

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01	02	03	04
What signals should you be paying attention to? In what order?	How should you continually navigate changing consumer demand?	How do you continually adjust your goals to balance volume and efficiency?	What is your client segmentation strategy and how are you tracking which audience comes back and when?

Actions for marketers

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Action plan: Capture demand

Key client opportunity

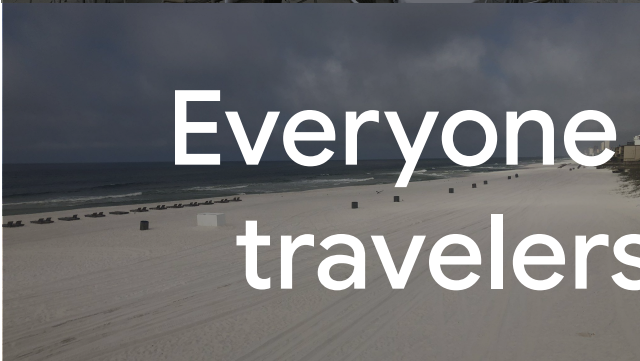
- Continue to monitor leading indicators to be ready for onset of travel demand.
- Successfully navigate fluctuations in consumer demand.
- Adjust your goals to balance volume and efficiency
- Dynamically adjust your messaging to capture emerging demand and “new normal” behaviors.

How Google can help

- Use Google trends and review 1st + 3rd party research.
- Optimize your automated bid strategy by layering on DDA to leverage all signals that lead to conversions.
- Use the latest Google and 1P data to address new normal of CPCs, cancellation rates, competition; Pass-back conversion values.
- Use Dynamic Search Ads (DSA) to capture new searches outside of your existing keyword list; Ensure KWs reflect new trends.

03

Accelerate digital transformation to build long-term business resilience.



Everyone still wants to travel, but
travelers' wants have changed



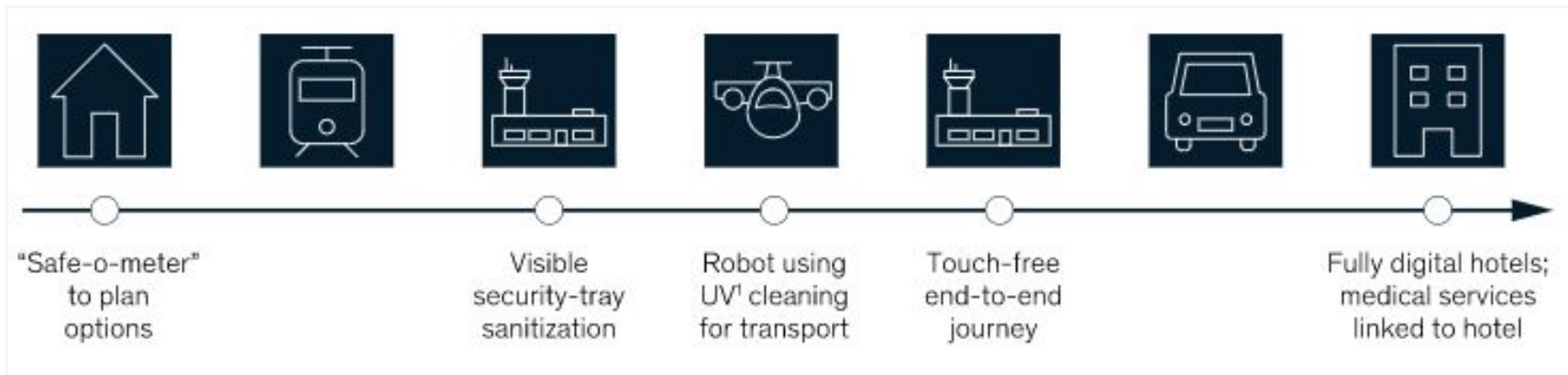
Listen to what your customers want you to prioritize

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Answer	Flight	Hotel	Car	Cruise
25% discount on rate	31%	32%	39%	33%
Enhanced, hospital grade cleaning	20%	31%	24%	18%
No change / cancellation fees	27%	19%	18%	16%
Free sanitizer, wipes and masks in rooms	15%	12%	12%	20%
Double miles or rewards points on stay/rental/flight	7%	7%	8%	13%

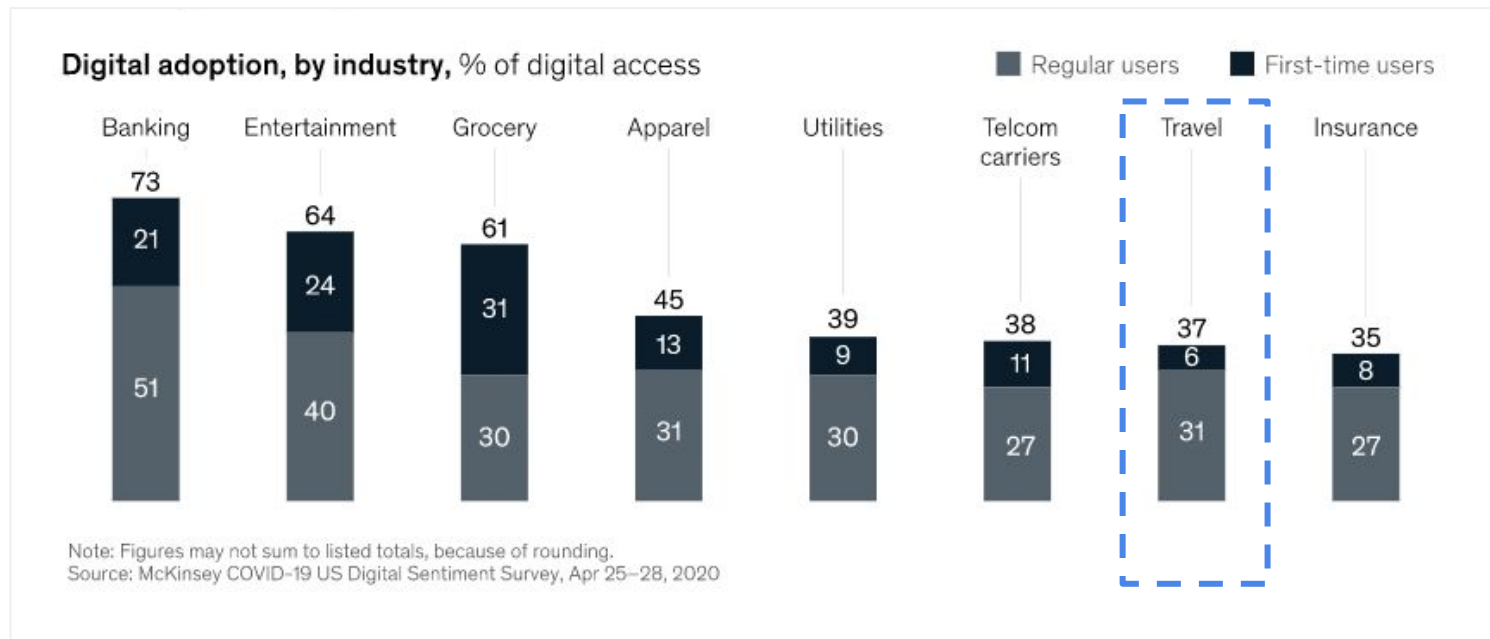
The 'new' travel customer journey will use 'digital', to address health risks and provide a contactless experience

Illustrative Travel Consumer Journey



Travel is lagging behind in consumer digital adoption.

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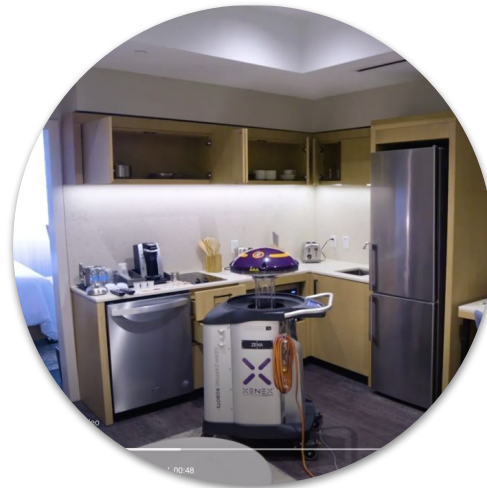


Shift your business to meet your customers' changing needs

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Boutique hotels in Copenhagen now have the world's first self-cleaning rooms



The Westin Houston Medical Center is the first and only hotel to use robots to combat germs by zapping them with UV rays.

Shift your business to meet your customers' changing needs

Proprietary + Confidential



Etihad Airways trials new technology to help identify medically at-risk travellers



British Airways trials autonomous robots to interact with travelers and answer questions, including real-time flight information

Accelerate Digital: Considerations for marketers

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01	02	03	04
In the new normal, which areas of your business need to pivot?	How can you use technology to meet your consumers' changing needs?	How does your brand messaging align with the new normal?	What gaps in resourcing do you have to fill in order to invest in products in the long term?

Actions for marketers

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Action plan: Accelerate digital

Key client opportunity

- Strengthen your online experience
- Build awareness for new offerings/features
- Optimize your measurement strategy
- Embrace technology to accelerate digital

How Google can help

- Leverage UX design principles and best practices to prime your website for emerging demand.
- Use new creative in display and video to communicate messaging and address top customer priorities.
- Use Google Analytics to understand your best performing and most impacted customer segments; Optimize sitewide tagging and data integrations.
- Harness data and tech (e.g. Google Marketing Platform products) to build better customer insights and drive business outcomes.

Wrap up

Key questions

1) **Where** will travel demand come back first?

Taiwan and Denmark have been leading, while US has progressed faster than other countries. OK, IN, and AL are leading states in the US.

2) **When** will travel return and at what speed?

For some regions, Accommodations demand has started to return to growth. It has taken leading regions ~6 weeks to go from “nascent” stage, to “stabilizing” or “leading” stages, which exemplify positive growth.

3) **What** will travel demand look like?

Some pent up demand (yoy growth rates) is typically seen in the “stabilizing” stage. The shape of demand could be different across categories.

Strategy recommendations

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- 1) Tracking broad consumer demand at scale (where, categories)
- 2) Feeling confident before consumer demand progressively returns (turning back on, timing, awareness campaigns)
- 3) Helping to make informed decisions to respond (automation)

Thank you



Questions?

