Travel Category
Navigating a Post-COVID World

NBCUniversal + Sky
A Year Hallmarked by Disruption

With stay-at-home orders, travel restrictions and low consumer confidence, travel was one of the industries most impacted by COVID-19.

As travel brands prepare for long-term recovery, we understand the importance of restarting the travel dialogue with consumers, generating demand, and leading the health and safety conversation.
2020 Transformed How Consumers Think About Travel

Creating category challenges…

- Global restrictions and stay-at-home orders led to **significant declines in both business and leisure travel**
- **Diminished consumer confidence** in travel, as people wait for vaccine roll-out

…and emerging opportunities

- **Pent up leisure travel demand**
- **Average trip duration increased during the pandemic**, as consumers embrace long-term rentals and remote working stays
- Consumer demand for **seamless, safe travel options** from trusted brands
Marketplace Tailwinds Present a Positive Outlook...

As Brands Continue the Conversation with Consumers

Pace of Vaccine Roll-Out Is Accelerating

Consumers Are Saving for Return to Travel Experiences

Travel Intentions Continue to Grow
As Consumers Begin to Travel, Behaviors and Expectations Have Evolved

**Reward Mindset**
61% plan to spend more than they normally would on a trip in 2021

**Health & Wellness**
78% want to travel in 2021 to relieve the stresses from 2020

**Bleisure Occasions**
54% believe the freedom and flexibility of being able to work while traveling the globe is more appealing now

**Sustainability Support**
68% agree they are trying to be more aware of sustainability-friendly travel brands to support

Source: American Express Travel: Global Travel Trends Report, January 2021
As Travel Brands Develop Their Post-Pandemic Strategy, There Is an Opportunity to Create Reassurance and Generate Excitement

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Generate Excitement and Convey New Normal</th>
<th>Lead the travel conversation by reaching and driving top of mind awareness with travel intenders at scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consideration</td>
<td>Explain Opportunities and Unique Offerings</td>
<td>Drive brand relevancy and understanding with target audiences most likely to engage</td>
</tr>
<tr>
<td>Purchase Intent</td>
<td>Showcase Near Term Benefits and Options</td>
<td>Capture travel prospects by leveraging call-to-action capabilities to drive search, site traffic, app downloads etc.</td>
</tr>
<tr>
<td>Brand Equity</td>
<td>Provide Education and Create Reassurance</td>
<td>Build trust by leading the conversation around health and safety, as consumer expectations have evolved</td>
</tr>
</tbody>
</table>
Key Considerations
When Restarting the Travel Dialogue

1. Evaluate audiences to re-engage
   - Leverage your local, national, and global footprint to maximize reach with existing or redefined target audiences across markets.

2. Align your approach with consumption
   - Capitalize on evolving consumption patterns and relevantly connect with consumers by activating across platforms.

3. Balance a geo/national mindset
   - As stay-at-home orders and vaccine roll-out varies across markets, respond accordingly through local and geo-targeting capabilities.

4. Capture attention and build trust through lean-in storytelling
   - Reassure travelers and communicate new brand messaging through high impact content and storytelling opportunities.

5. Trigger consumers to act
   - Inspire travelers to search, download, interact, and/or book via actionable content and commerce opportunities.
Partner with NBCU + Sky to Create and Capture Travel Demand Across Local, National and Global Markets

**615M**

People Reached Per Month

**$24B**

Invested Annually In Content

**GIVES US**

World-class content on every screen, live and on demand

Audience targeting at a local, national and global level

Scalable storytelling capabilities

Cultural events that transcend borders

**GIVES YOU**

Engaged audiences across the world

Brand-safe, trusted content

The ability to create excitement and capture pent up travel demand
The Path Forward
What's Next for Travel from NBCUniversal + Sky

Engaging the Leisure Traveler: A 2021+ Playbook

Multicultural Audiences: An Untapped Growth Engine for Travel

‘Travel is Universal’ Content, Events, & Marketing Series

Note: Content roadmap is work in progress and subject to change
The Travel Industry Is Beginning to Re-engage, And Marketplace Developments Signal Category Momentum

U.S. Travel Category Media Spend (SMI Core)

25%+ of U.S. population receives first vaccine dose

# of U.S. air travelers hits new peak since March 2020

California Theme Parks to open at 15% capacity

Cruise booking window hits new record: 365 days in advance

Consumers explore spring break travel options

Back to School

Consumers hope to reunite for the Holidays

U.S. expected to hit vaccine herd immunity

Back to School
Partner with NBCU + Sky to Engage Audiences with the Right Travel Message
615M People Across 150+ Countries, from Local to National to Global
Thank You!

NBCUniversal + sky