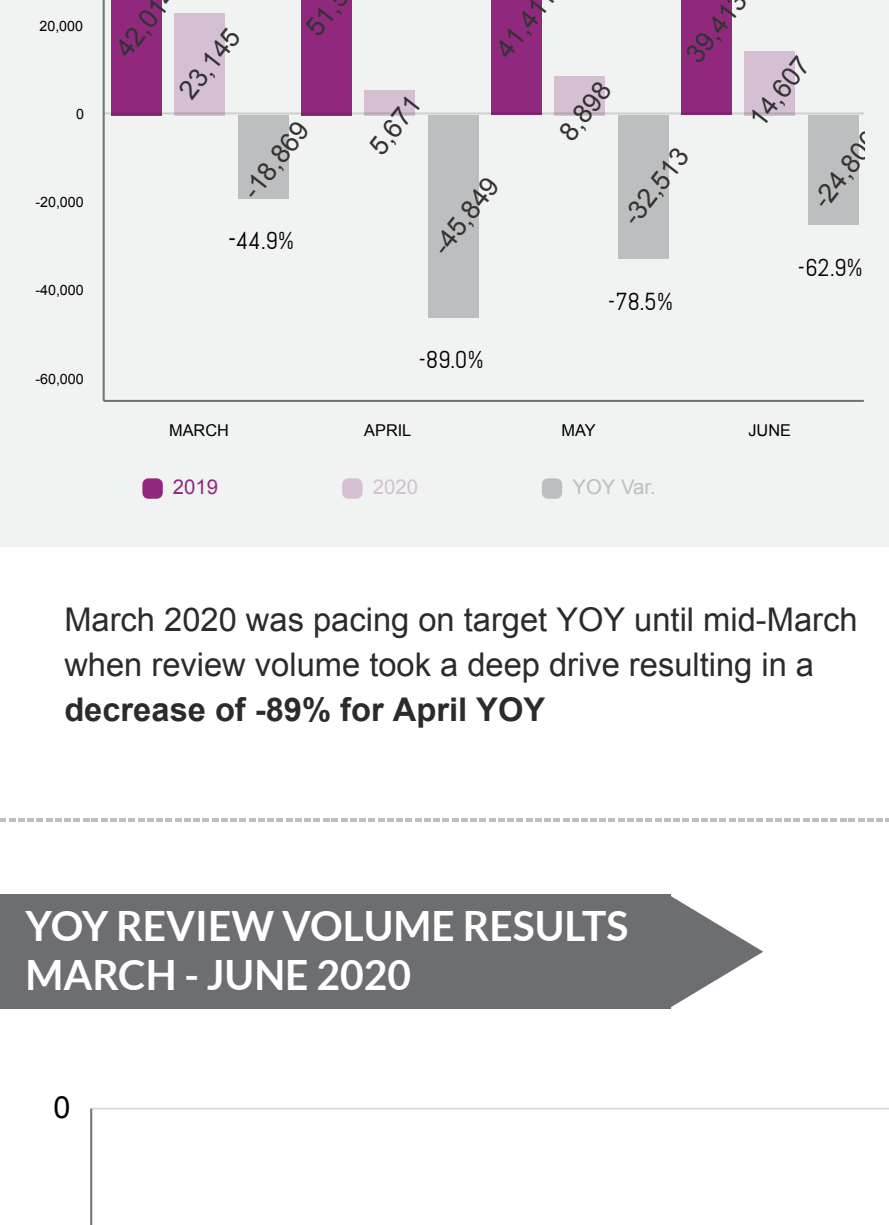


Pre & Post Covid-19

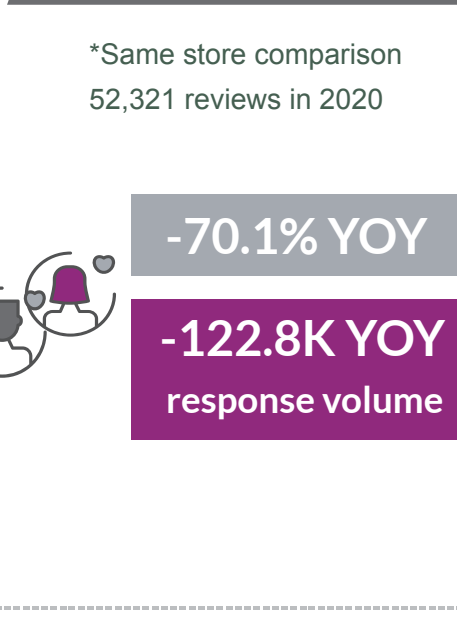
STATISTICS & WHAT IS NEXT FOR HOTELS?

YOY MONTHLY VARIANCE REVIEW VOLUME



March 2020 was pacing on target YOY until mid-March when review volume took a deep dive resulting in a decrease of -89% for April YOY

YOY 4-MONTH COMPARISON REVIEW VOLUME



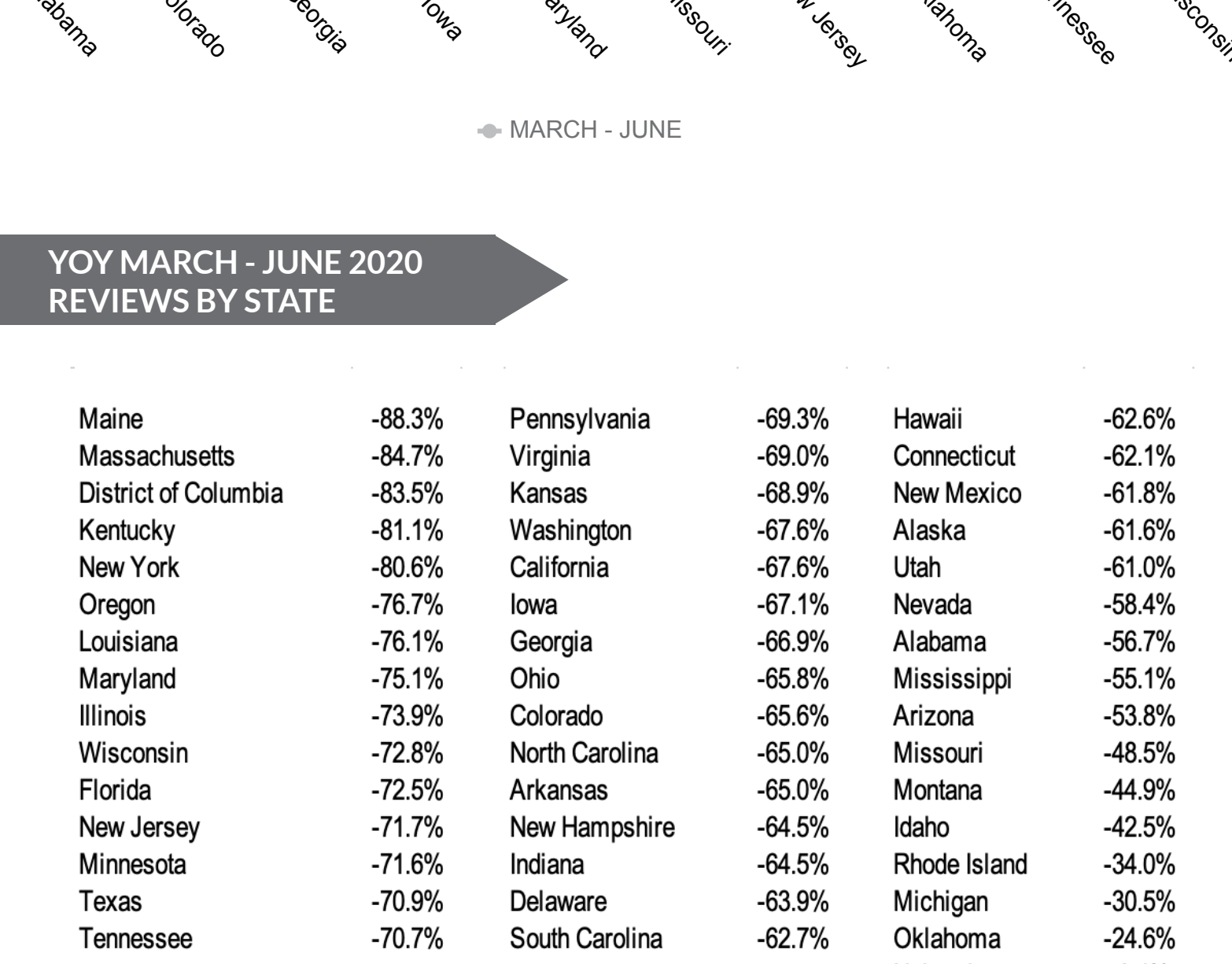
*Same store comparison

52,321 reviews in 2020

-70.1% YOY

-122.8K YOY response volume

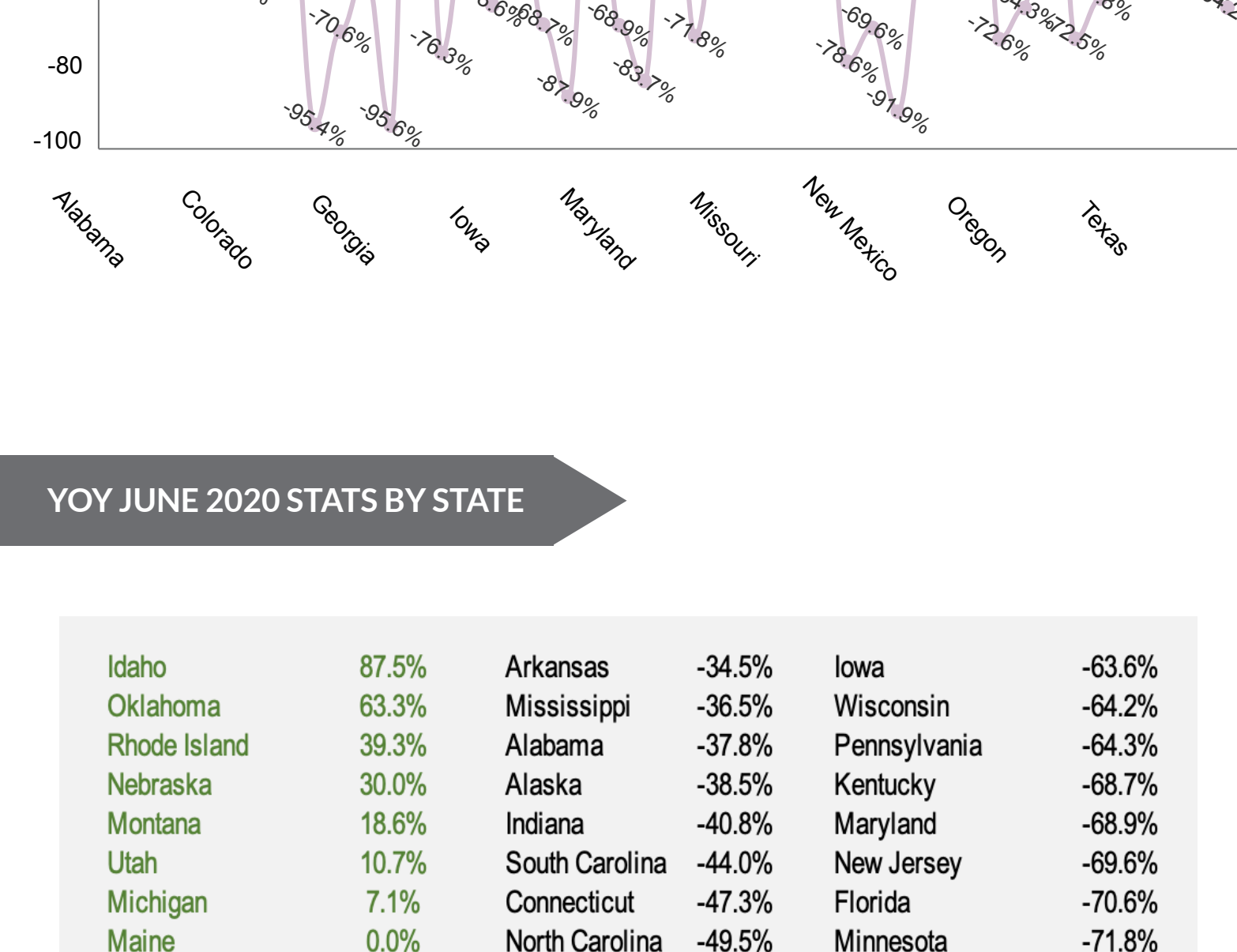
YOY REVIEW VOLUME RESULTS MARCH - JUNE 2020



YOY MARCH - JUNE 2020 REVIEWS BY STATE

Maine	-88.3%	Pennsylvania	-69.3%	Hawaii	-62.6%
Massachusetts	-84.7%	Virginia	-69.0%	Connecticut	-62.1%
District of Columbia	-83.5%	Kansas	-68.9%	New Mexico	-61.8%
Kentucky	-81.1%	Washington	-67.6%	Alaska	-61.6%
New York	-80.6%	California	-67.6%	Utah	-61.0%
Oregon	-76.7%	Iowa	-67.1%	Nevada	-58.4%
Louisiana	-76.1%	Georgia	-66.9%	Alabama	-56.7%
Maryland	-75.1%	Ohio	-65.5%	Mississippi	-55.1%
Illinois	-73.9%	Colorado	-65.6%	Arizona	-53.8%
Wisconsin	-72.8%	South Carolina	-65.0%	Missouri	-48.5%
Florida	-72.5%	Arkansas	-65.0%	Montana	-44.9%
New Jersey	-71.7%	New Hampshire	-64.5%	Idaho	-42.5%
Minnesota	-71.6%	Indiana	-64.5%	Rhode Island	-34.0%
Texas	-70.9%	Delaware	-63.9%	Michigan	-30.5%
Tennessee	-70.7%	South Carolina	-62.7%	Oklahoma	-24.6%
				Nebraska	-9.4%

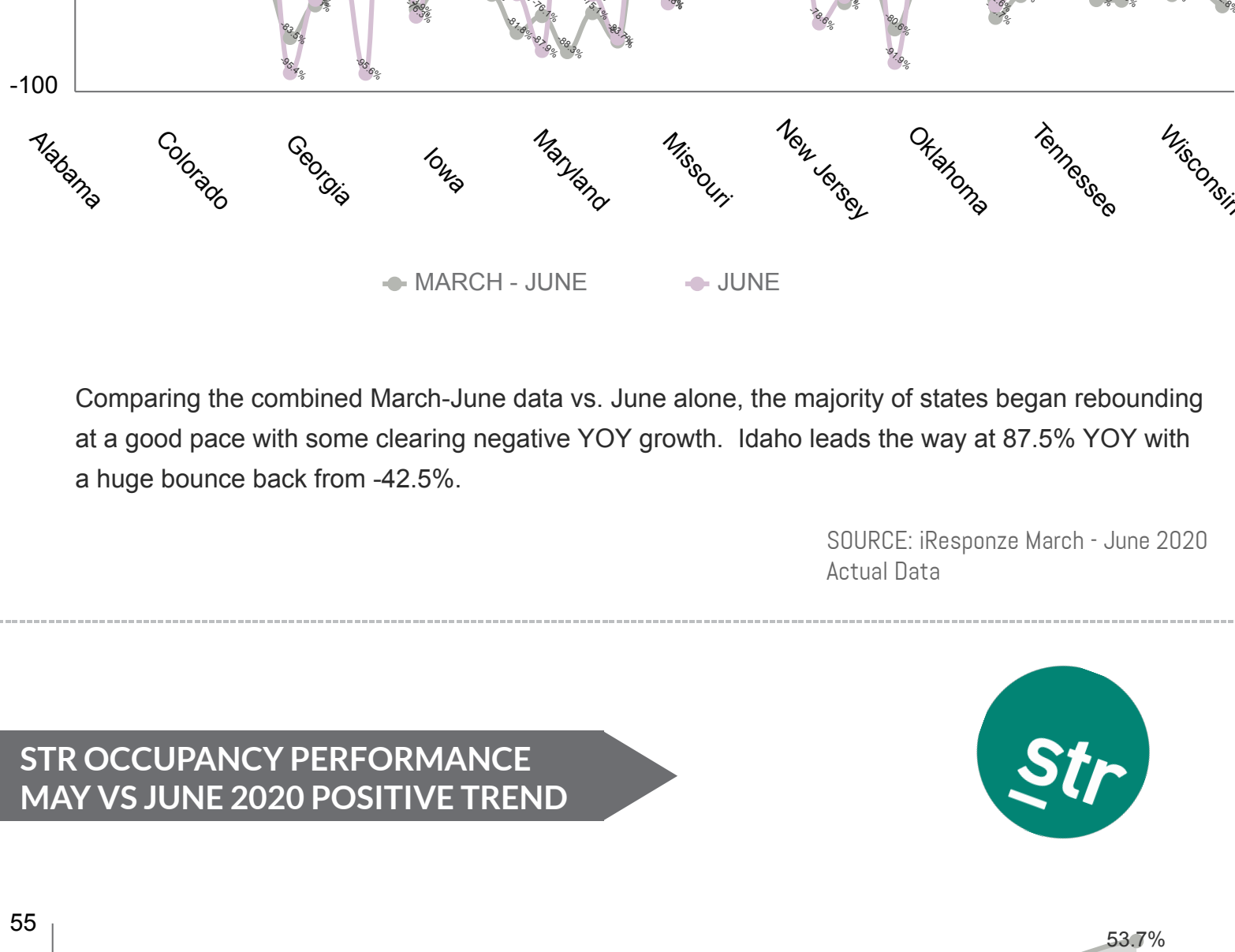
JUNE 2020 RECOVERY



YOY JUNE 2020 STATS BY STATE

Idaho	87.5%	Arkansas	-34.5%	Iowa	-63.6%
Oklahoma	63.3%	Mississippi	-36.5%	Wisconsin	-64.2%
Rhode Island	39.0%	Alabama	-37.8%	Pennsylvania	-64.3%
Nebraska	30.0%	Alaska	-38.5%	Kentucky	-68.7%
Montana	18.6%	Indiana	-40.8%	Maryland	-68.9%
Utah	10.7%	South Carolina	-44.0%	New Jersey	-69.6%
Michigan	7.1%	Connecticut	-47.3%	Florida	-70.6%
Maine	0.0%	North Carolina	-49.5%	Minnesota	-71.8%
Nevada	-14.3%	Georgia	-54.7%	Oregon	-72.6%
Arizona	-22.7%	California	-54.7%	Illinois	-76.3%
Kansas	-24.3%	Virginia	-55.5%	New Hampshire	-78.6%
New Mexico	-27.1%	Texas	-56.0%	Massachusetts	-83.7%
Ohio	-27.2%	Colorado	-57.6%	Louisiana	-87.9%
Missouri	-29.1%	Washington	-58.8%	New York	-91.9%
Delaware	-29.2%	Tennessee	-61.8%	District of Columbia	-95.4%
				Hawaii	-95.6%

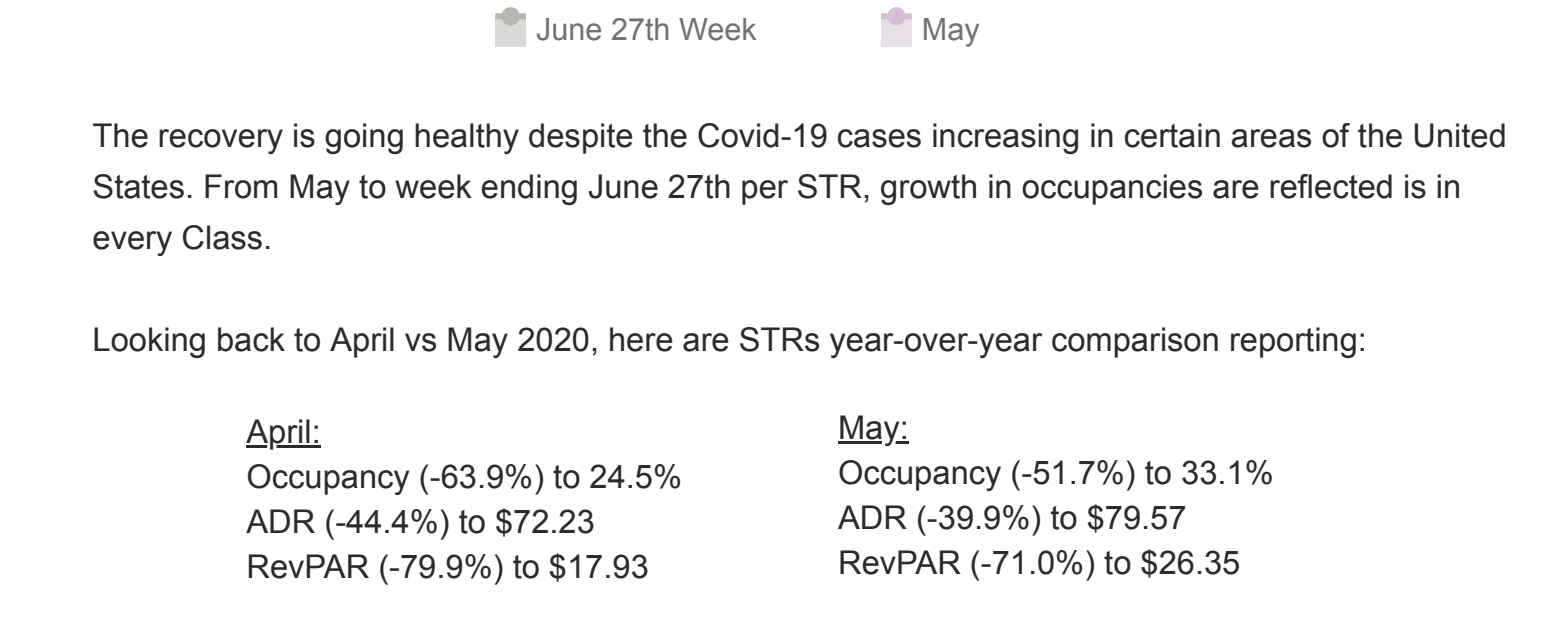
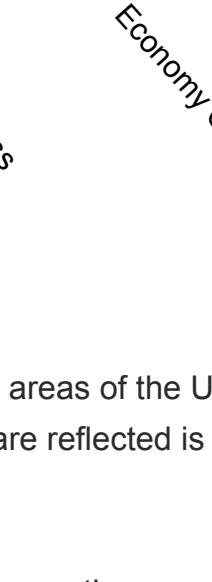
YOY DECREASE MARCH - JUNE 2020 VS JUNE REBOUND



Comparing the combined March-June data vs. June alone, the majority of states began rebounding at a good pace with some clearing negative YOY growth. Idaho leads the way at 87.5% YOY with a huge bounce back from -42.5%.

SOURCE: iResponse March - June 2020 Actual Data

STR OCCUPANCY PERFORMANCE MAY VS JUNE 2020 POSITIVE TREND



The recovery is going healthy despite the Covid-19 cases increasing in certain areas of the United States. From May to week ending June 27th, growth in occupancies are reflected in every Class.

Looking back to April vs May 2020, here are STRs year-over-year comparison reporting:

April:	May:
Occupancy (-63.9%) to 24.5%	Occupancy (-51.7%) to 33.1%
ADR (-44.4%) to \$72.23	ADR (-39.9%) to \$79.57
RevPAR (-79.9%) to \$17.93	RevPAR (-71.0%) to \$26.35

Month-over-month comparisons shows positive Occupancy growth of 8.6% + ADR growth at \$7.34. A contributing factor to the comparison is that 50% of the hotels are still closed which may be inflating the performance growth reported when looking at National Average results.

LEISURE MARKET PERFORMANCE SAMPLING WK/DAY vs WK/END

Submarket	Weekday Occ %	Weekend Occ %	Point Difference
Myrtle Beach/South, SC	23.7	74.9	51.2
Daytona Beach, FL	35.0	73.1	38.0
Fort Walton Beach, FL	43.3	80.6	37.3
Myrtle Beach/North, SC	32.0	67.3	35.3
Gatlinburg/Pigeon Forge, TN	19.7	52.3	32.6

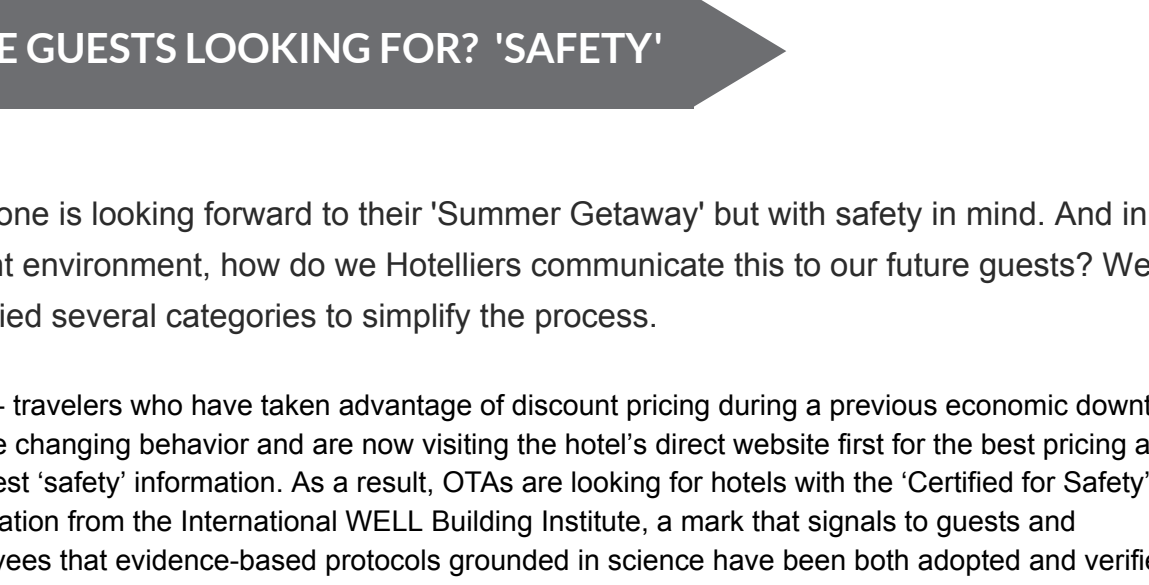
Per Jan Freitag, SVP of Lodging Insights at STR, "destination markets that have benefited from the leisure drive-to-demand continues to outperform others over the weekend is a very strong indicator that leisure demand is very healthy across the United States".

SOURCE: STR.com Actual Data

GUEST TRAVEL PLANS - AHLA SURVEY RESULTS

"Travel is by no means back yet, but we are encouraged to see people begin to travel as their communities reopen, and we all learn to navigate this new normal. If you are thinking about traveling in 2020, my message to you is that hotels are clean and safe places, and we are ready to welcome you when you're ready to travel. Through our Safe Stay initiative, we enhanced our already rigorous cleaning protocols to be more transparent and give you even more peace of mind."

Chip Rogers
President and CEO
American Hotel & Lodging Association



Key findings among those planning to travel in 2020:

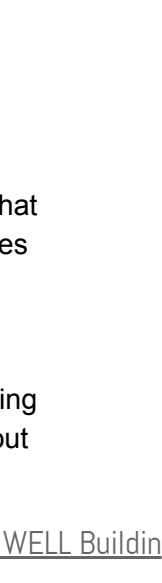
- What kind of travel they're planning: 81% expect to take a day trip and 72% expect to take an overnight vacation via car within the next five months. The overwhelming majority do not expect to take cruises (14%), camper/RV trips (28%), or vacations via plane (32%) in 2020.
- How far they're traveling: Among those planning a vacation via car, 75% plan to travel two or more hours (40% plan to drive more than four hours, and 35% plan to drive two to four hours).
- Where they're staying: On their next overnight trip, 43% say they will stay with family or friends, 39% in a hotel, 9% in a short-term rental, and 5% in a camper/RV.
- How long they're staying: 78% are planning trips of four nights or less.
- Why they're traveling: 55% plan to travel for a family event, such as a wedding, birthday, anniversary, or family reunion; 50% plan to travel for Christmas, 43% for Thanksgiving, 33% for 4th of July, and 30% for Labor Day.

SOURCE: AHLA Survey June 2020

WHAT ARE GUESTS LOOKING FOR? 'SAFETY'

Everyone is looking forward to their 'Summer Getaway' but with safety in mind. And in the current environment, how do we Hoteliers communicate this to our future guests? We have identified several categories to simplify the process.

OTAs - travelers who have taken advantage of discount pricing during a previous economic downturn may be changing behavior and are now visiting the hotel's direct website first for the best pricing and the latest 'safety' information. As a result, OTAs are looking for hotels with the 'Certified for Safety' designation from the International WELL Building Institute, a mark that signals to guests and employees that evidence-based protocols grounded in science have been both adopted and verified with third-party document review'. Hotels must file an application for their assessment, certification and an annual review. Access the [application](#) here.



On-Line Reviews - In addition, to ensuring you are ranking higher on OTA channels vs. your competition with the proof of 'safety', remember to stay engaged with your past guests. Respond to their reviews in a timely fashion as they will influence future guests' decisions. Key components to keep in mind:

- Monitor your online reviews and surveys 24/7 - it's the first step to responding and ensures guest feedback is never missed
- Respond to 100% of your reviews, proving to travelers that you hear them and you are actively engaged in their feedback
- Ensure you respond on all sites - TripAdvisor, Google, Facebook, and all OTAs, plus leverage Expedia In-House Alerts for service recovery
- Remember - brand loyal guests will trust reviews and responses on your brand's website, so even if your brand has relaxed requirements, responding is important

Social Media - creating a strategy during the current environment is critical. Future guests have question and they want answers. Questions are being asked via messaging on Facebook, Twitter and Instagram. Answering their questions promptly and consistently will boost trust. Showcasing your current guest experience online will go a long way in confirmed bookings, i.e. families enjoying your pool or being able to access F&B at your hotel. Videos are a great way to show the precautions in place to keep guests safe and well. Consider the following ideas on how to maximize your social media channels:

- Reassure guests about your safety and cleanliness practices, instilling trust, and stimulating confidence.
- Set the scenario for hotel check-in/check-out and what engaging with your staff looks like
- Communicate any changes with your F&B, swimming pool, and all your amenities
- Inform guests about popular, local attractions, keeping them informed and motivated
- Use confidence-building images of both travelers and team members experiencing your hotel.
- Leverage user-generated content, both photos + videos, to show credibility of how guests are enjoying your hotel in the 'new reality.'
- Indicate COVID-19 updates, including opening dates and precautions taken at the hotel
- Interact and engage with followers; answer as many questions as possible prior to their arrival
- Post an FAQ sheet with responses to help educate

Hotel Website - perfect place to communicate with your loyalty members and others who are searching for their next getaway. As hotels are just starting to reopen in some markets, more scrutiny will be in place regarding content for COVID best practices. The need for compassionate, comforting and clear communications directly from the hotel is critical. Here are some examples of what can be included:

- What measures are in place for cleaning public space, guest-rooms, restrooms, etc.?
- Will masks and hand sanitizing stations be available throughout the property?
- How are associates assured that they are healthy, i.e. temperatures be checked?
- Are rooms vacant for 24 hours between guest visits?
- Will meal options be modified? Temporarily?
- Are on-site pool or town beaches open? Is there parking?

Hotel Direct - Knowledge is Power; have everyone involved and educated at the Hotel level with what is the latest 'closures or openings', what precautions are in place to keep both Guests and Associates safe so that they can communicate this clearly in person and on the phone with your guests. In addition, Sales team might have been furloughed and just getting back, it is imperative for them to communicate with your Corporate Accounts, repeat guests, meeting planners, wholesalers, tour operators and future groups coming to your hotel on an ongoing basis as to the status of what is going on at the Hotel level and also the area of the Hotel itself. Remember, there is so much information out there and no two areas of the Country are being impacted the same way due to COVID-19.

SOURCE: International WELL Building Institute

BOTTOM LINE

Travel is returning. Guests will be staying at hotels. They care about safety first. They want to know what their experience will look like at your hotel. Encourage these summer travelers to stay with you and secure a competitive edge in your market.

Start now by showcasing your story on social media, answering travelers' questions, and responding to guest reviews.

If your hotel is operating with limited staffing leaving no time to stay social and stay engaged, save labor costs by partnering with a company that will take care of you while you take care of your guests.

It's more important than ever to be proactive and engaged with your guests while the industry we love shows signs of recovery, and we all learn to navigate this new normal.

