

..... A NEW VIEW

TRAVEL MARKETING PAST THE PEAK OF COVID-19

MAY 5, 2020



INSPIRING TRAVEL
THROUGH RESPONSIBLE JOURNALISM



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By the end of April 2020, it appeared that the grip COVID-19 had on the travel industry had at least not tightened any more since bringing the industry to its knees. Some states in the U.S. and nations in Europe were looking towards reopening, gradually easing “shelter in place” orders that had been established for weeks. Bright spots even emerged as New Zealand reported new COVID-19 cases in the single digits by April 27. The pandemic had hardly passed, but we could all at least begin to imagine traveling again.

SATW, in partnership with Development Counsellors International (DCI), joined forces once again to understand better how travel journalists and travel PR are faring during this global pandemic. This second study builds on the results of the first two, published in March 2020, creating a useful comparison to track how writers and marketers are evolving in real-time with the COVID-19 pandemic.

While the previous study provided hope, this study confirms it, helping DMOs and travel PR professionals to understand how travel writers will work with them during recovery efforts – and vice versa. Travel professionals in media and PR will still be there for the most part, but the way they approach their professions will be altered for the foreseeable future as we all figure out how to operate in this new world.

Part 1 will address the travel media, while Part 2 will look at results from the travel PR study. We'll put them in conversation in Part 3, to see what lessons the tourism industry can learn from this crisis and our handling of it.

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PART 1

A VIEW FROM MEDIA

Key Findings

#1 . Media Chameleons:

Travel journalists have adapted quickly to their new roles and are pivoting – or bending – to create travel stories through new lenses. They are looking at other angles to position destinations instead of relying on standard approaches. We're seeing less desire for COVID-19 resiliency stories and an acknowledgement that most travel stories – for the moment – will focus on virtual travel rather than experiential travel.

#2 Pitch Perfectly:

While there is no science on how to pitch stories, the study indicates that most writers will want travel-related story ideas sent their way between now and Q3, signaling a return to some semblance of normalcy. The majority suggested that Q3 will be best, suggesting that autumn travel will be a higher priority for media outlets than summer, due to the uncertainty that still clouds the tourism industry.

#3 On Stand-by:

Travel journalists are not ready to go the distance just yet. The largest segment (35%) reports that they may begin to plan travel for Q3, passing over the summer entirely for domestic trips. A similar majority (34%) remained unsure about international travel, with just 21% reporting that Q3 will be likely. Few travel journalists, however, are shying away from air travel, which means it's not the journey but the destination that may be the larger hurdle to traveling. Looking locally will be key during recovery efforts.

#4 Not Hopeless:

The general attitude of travel journalists throughout the study was one of optimism and hope, however cautious they may be. Respondents are not entirely in agreement that the travel media will return to its previous state, though this finding – presented in our initial study as well – does not indicate hopelessness. Instead, the findings suggest that travel writers are aware that the travel media landscape has been altered, but they are still very much a part of it.

#5 Keep It Up:

Travel journalists may be sick of isolating at home, but they aren't tired of hearing from the colleagues in travel PR. When asked what they need from PR teams, there was an emphasis on continued communication and pitching, albeit with appropriate angles and innovative takes that will help them produce stories that publications will actually want.

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PART 1

OVERVIEW

This report followed our initial study in March 2020 that questioned members of the travel media at the beginning of the COVID-19 outbreak, when lockdowns were fewer and information was scarcer. This study, a similar survey with certain modifications based on feedback from the first, looks to create a comparison, offering a glimpse into what changed and what opinions and feelings have remained steady. A total of 458 journalists participated in the survey.

In which market do you live?

■ U.S. ■ Canada

1st Edition

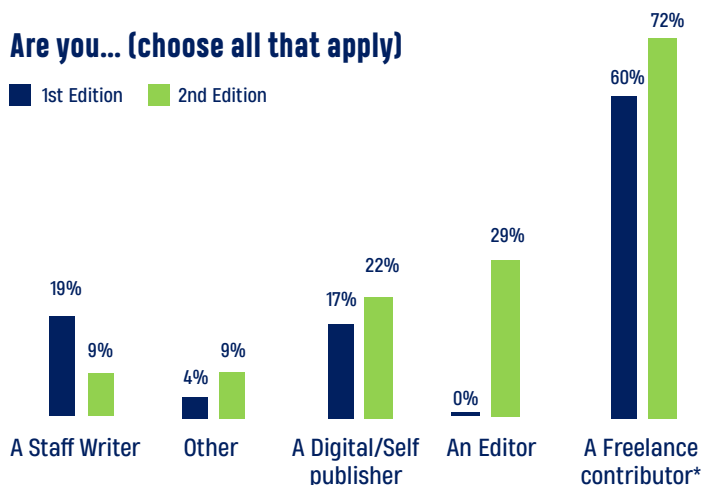


2nd Edition



Are you... (choose all that apply)

■ 1st Edition ■ 2nd Edition



*The first edition of the study categorized staff writers and editors together but these groups were broken out in the second edition of the study.

A difference this time was that we saw more freelancers, with 72% identifying as such compared to 60% previously. There was a similar increase in self-publishers, up 5% total. Countless layoffs as the media industry has shrunk during the COVID-19 crisis may help explain why more writers are now identifying as “self-publishers” or “freelance.” The graph also notes a larger presence of editors in this edition, namely because staff writers and editors – essentially those with salaried-positions – were lumped together in the previous study, and we were able to target more editors for surveying. The results do not demonstrate an increase in salaried positions at this time.

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PART 1

DAILY ROUTINES

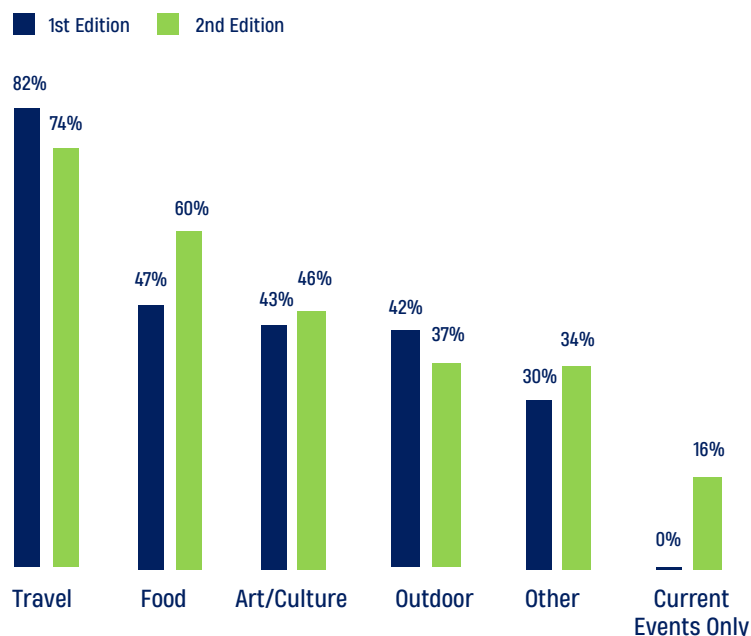
When asked how they are spending their days, a greater portion of writers (46% in April compared to 28% in March) are now researching and writing feature stories, showing that many writers have managed either to resume or continue working within the past month. This sign is a very positive one for travel marketers looking to secure coverage for destinations.

Writers across the board report still staying at home and avoiding one-on-one meetings, preferring phone meetings with PR and destination representatives, instead. There are no significant changes there.

What has changed slightly this time around, however, is what journalists and writers are working on in their stories. With a slight decrease in travel, there are upticks in food, art/culture, and current events topics compared to our first study. As the travel industry is now fully ground to a halt, it is no surprise that writers are finding ways to pivot, accepting more diverse story angles than before.

What types of stories are you currently publishing?

(Choose all that apply)



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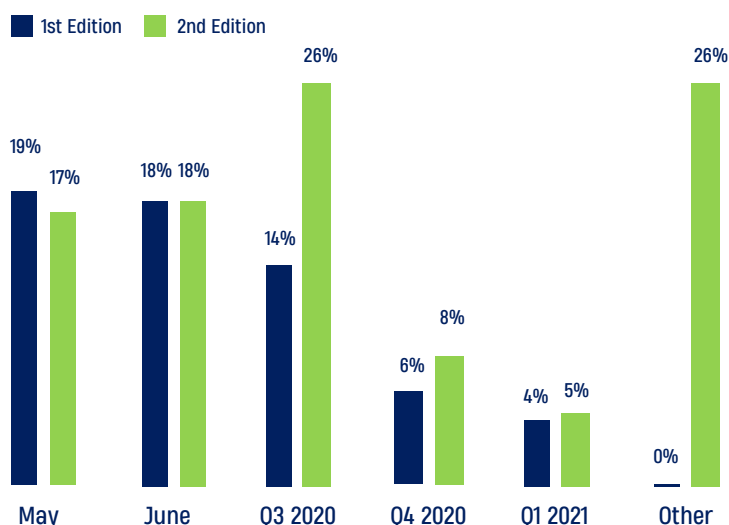
PART 1

WHEN TO PITCH

At the beginning of May 2020, we're not out of the woods yet, but many writers are still accepting pitches. For travel PR, it is important not to be tone deaf while sending out story ideas, but this study shows that there is still a need for pitches sooner than later.

A larger portion of travel writers (26%) are hopeful that Q3 will be the prime time to accept travel pitches again, though nearly 30% are hopeful that April-June will also be a good time. These findings suggest that writers are optimistic about autumn travel and are looking to generate topics and stories now, leading up to an eventual return to commercial and business travel.

When do you expect to start accepting lifestyle and/or travel pitches again? (Choose all that apply)



Which, if any of the following, pitches are you currently accepting? (Choose all that apply)



Destination features and travel news topics are still fair game for pitches, but less so than before, with personality-driven pitches and interviews creeping up in the responses. With fewer people able to travel, demand for destination-based stories has understandably fallen, but still remains important despite the decrease. As nations and states begin to reopen already, having reliable information from trustworthy voices will be key for recovery efforts.

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PART 1

TRAVEL: WILL THEY, WON'T THEY?

As far as actually traveling, slightly fewer respondents in April reported actively planning new trips. With so much uncertainty and restrictions still weighing on us all, it is understandable that journalists haven't yet regained confidence to begin planning trips.

Understanding the situation is changing daily, are you currently planning any future editorial research trips (either sponsored press trips or travel at your own expense)?

■ No ■ Yes

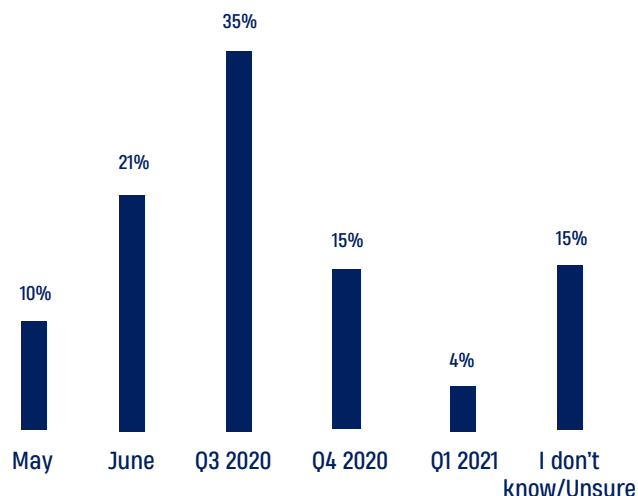
1st Edition



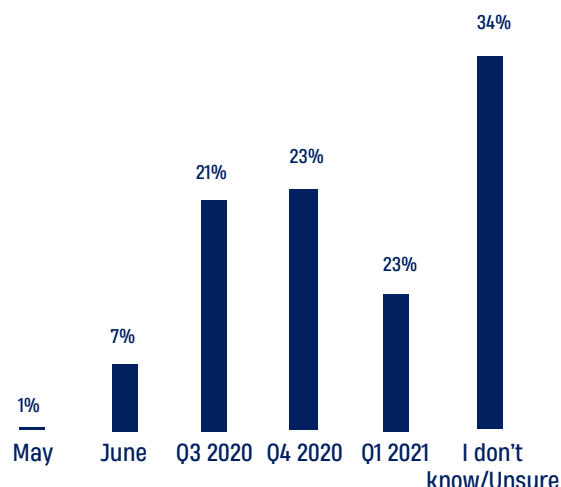
2nd Edition



In what time period are you currently considering domestic editorial travel?



In what time period are you currently considering international editorial travel?



Most (35%) are now looking to Q3 for domestic travel, while around the same majority (34%) are still not sure when they will be traveling internationally. These findings underscore how local travel will be returning to normal well before international travel. While mass testing or a vaccine could swing these majorities to earlier dates, it is unlikely that such developments will be on the horizon in 2020, at least not on a worldwide scale. Patience, therefore, is a main takeaway for marketers looking to attract international travelers. Looking locally will be a smarter way forward, as travelers may not likely go abroad for some time. Attracting local markets will be a more successful strategy and appealing to journalists in those markets is an important piece of that success.

Despite these hesitations, 68% still reported being open to travel by air, as opposed the 62% traveling by car. Only 16% asserted that they will travel by train, due in part to a lack of affordable rail connections within the U.S. and Canadian markets. We would expect different results among European travel writers, for example, who have more access to reliable train travel.

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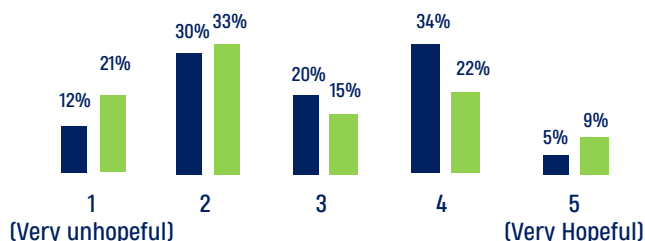


PART 1

HOPEFULLY HOPEFUL

How do you feel about the state of travel media (returning to pre-COVID-19 routines and readership) for the remainder of 2020?

■ 1st Edition ■ 2nd Edition



Practical considerations aside, we asked writers, yet again, how hopeful they are that travel media will return to pre-COVID-19 routines and readership. While slightly more are very hopeful (9% now as compared to 5% before), it seems that hope has waned more this time around.

These findings confirm yet again that travel journalists acknowledge that this crisis has changed their profession. While less hopeful than before about returning to pre-COVID-19 conditions, the ability of writers to pivot and adapt shows that they are instead looking towards a new environment. Moving forward during recovery, the travel industry and media together will need to rewrite the rules of how we all interact and function, if even just temporarily, while consumer confidence returns and we all get back on track.

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PART 1

KEEP IT UP

As in the previous study, travel writers expressed needing positivity and communication from travel PR teams. While the content of pitches may have changed during the pandemic, the relationships that PR professionals and travel writers have created have only gotten stronger thanks to more insistent and regular communication, including video calls and virtual tours. Many writers are eager to obtain information on future press trips and unique story angles that travel PR teams should be producing.

Travel writers are looking for local stories, outdoor stories, mental health getaways, sustainability angles and road trips. It appears that COVID-19 angles and virtual travel are slowing as popular topics.

One word, however, was recurrent in writers' responses when asked what they need travel PR teams to do: "keep." Keep pitching, keep updating, keep us informed, keep us posted, keep in contact, etc. This was the clearest message emanating from travel journalists, and should signal hope to PR teams and destinations that the media will rebound from this pandemic and that there are writers eager to help with these efforts.

How can PR teams best support you in this time?

| | | |
|---|--|---|
| "Send more post-COVID ideas." | "Understand that all assignments are written in chalk, in a rainstorm. Editorial calendars are changing hour by hour. We cannot guarantee anything." | "Stay in touch with long range plans i.e., Sept. 2020 and beyond." |
| "Talk about what destinations are doing now and any plans." | "Submit targeted and relevant pitches, do not blast them." | "Consider press trips as soon as feasible." |
| "Offer armchair travel ideas and fresh, timely ideas for what the future of travel will look like." | "Limit press releases that do not include access to sources." | "Keep delivering news and updates, with an emphasis on fourth quarter 2020 and beyond." |

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PART 2

A VIEW FROM PR

Key Findings

#1 Budget Woes:

Similar to what we saw among travel journalists, there is still uncertainty but also optimism and resiliency in travel PR. More PR professionals, however, report a pause in day to day work, budgetary impacts and furloughs. Public relations budgets are being impacted – and not positively – since the first edition of the study and the percentage of organizations reporting “no change” has seen a 6% decline.

#2 No More Agency:

In the 2nd edition, a higher percentage of respondents report they have a PR agency working on their behalf and, importantly, a higher percentage also report they have asked their agency to pause work on their behalf. While some PR professionals are getting back to work, the cuts and losses during the COVID-19 crisis will be felt for some time while the scope of work is limited for many agencies.

#3 Eventual Return to Influencers:

A higher percentage of respondents plan on commencing visiting journalist programs and digital influencer programs in Q3 2020 and a smaller percentage are reporting “they don’t know” when these programs will start back up compared to the first edition of the study. More than 30% however are not anticipating restarting programs until Q4 2020 or after. Still, these results offer more clarity than the first report, which is good news by our estimate.

#4 Still Pitching:

A higher percentage of respondents report that they are currently pitching editorial angles to media. They are focusing on COVID-19 resiliency stories, with an uptick in a few other areas of pitching as well. All in all, these results are positive, underscoring how travel PR professionals are returning to their pre-crisis modes of operating, even if cautiously.

#5 Daily Routine:

PR professionals continue to report they are dealing with more internal, destination specific issues as well as ongoing media monitoring. On the whole, however, activities including media relations and social media use are on the rise, suggesting a return to routines and to reigniting their relationships with the media that have been stalled for the past few weeks.

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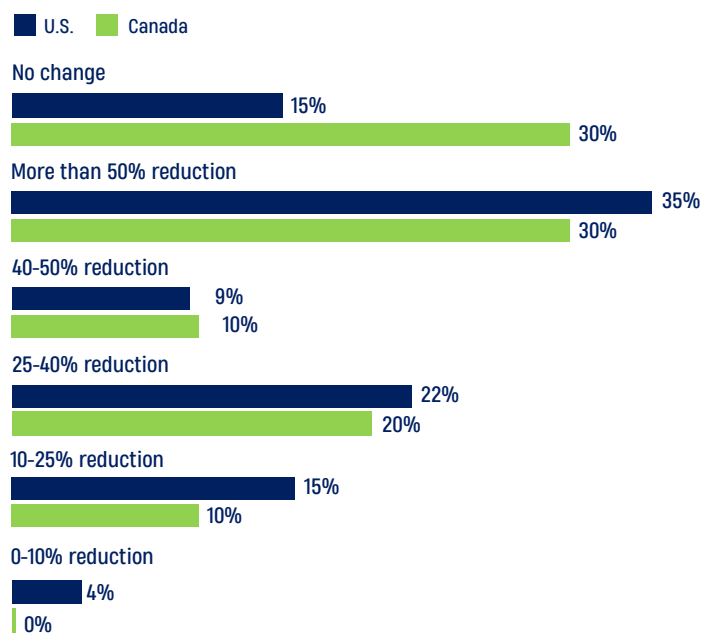
PART 2

BUDGET CUTS

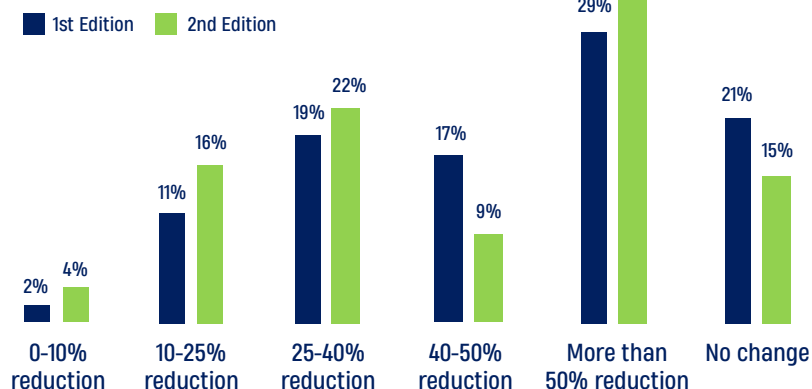
Between March and April 2020, public relations budgets have continued to decrease, with fewer travel PR professionals (15%) reporting no change than before (21%). The graph highlights the different levels of cuts reported, stacked against the previous results. Overall there is an increase in large cuts greater than 50% and slightly more cuts in smaller budgets, with only the 40-50% bracket seeing a decrease. While the data suggests that, perhaps, cuts will continue to be smaller and smaller, in general the news is that travel PR budgets continued to decrease overall.

Only in comparing the U.S. and Canada do we see some positive news, where 30% of Canadian travel PR professionals reported no change in the budget to date. An equivalent proportion, however, reported 50% or more reductions in budgets, so overall, there is little good news to report.

How is your public relations budget being impacted to date? (U.S. vs. Canada)



How is your public relations budget being impacted to date?



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PART 2

ADIEU TO AGENCIES

Part of the budget cuts that DMOs are facing includes public relations agencies. In the second edition, fewer respondents reported having public relations agencies, no doubt due to contract suspensions or dissolutions. And for those destinations that still work with an external PR agency, more have now asked their agencies to pause their work, 62% compared to 48% in the first round of surveys.

Do you have a public relations agency?

1st Edition



2nd Edition



Have you asked your public relations agency to pause their work on your behalf?

1st Edition



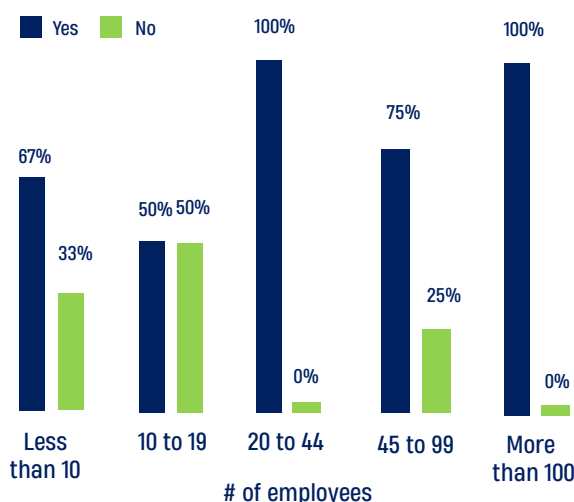
2nd Edition



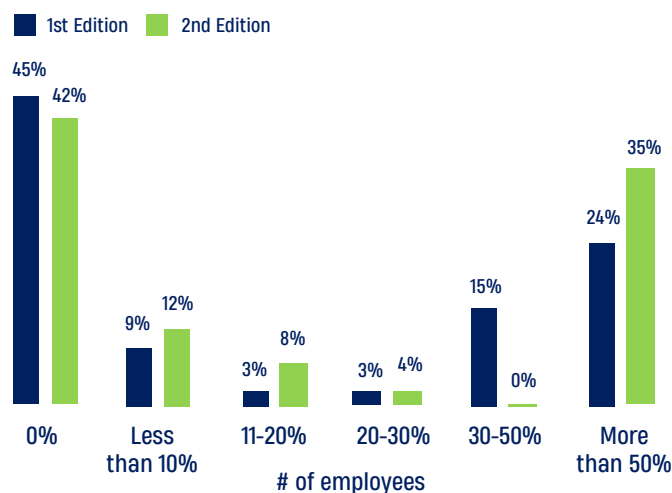
In this second edition, we also see that larger agencies tended to be paused more than smaller agencies. For DMOs working with sizeable agencies that have more than 20 employees, most reported pausing nearly all of their work for the moment. For those who maintained their PR agencies, there has been a slight augmentation of cuts, with more agencies seeing

50% cuts (35% of respondents) than in the previous report (just 24%). This signals that external PR agencies will also be creating a pathway to their own recovery as the scope of their work continues to diminish.

Have you asked your public relations agency to pause their work on your behalf?



At which level have you reduced your public relations agency's budget at this time?



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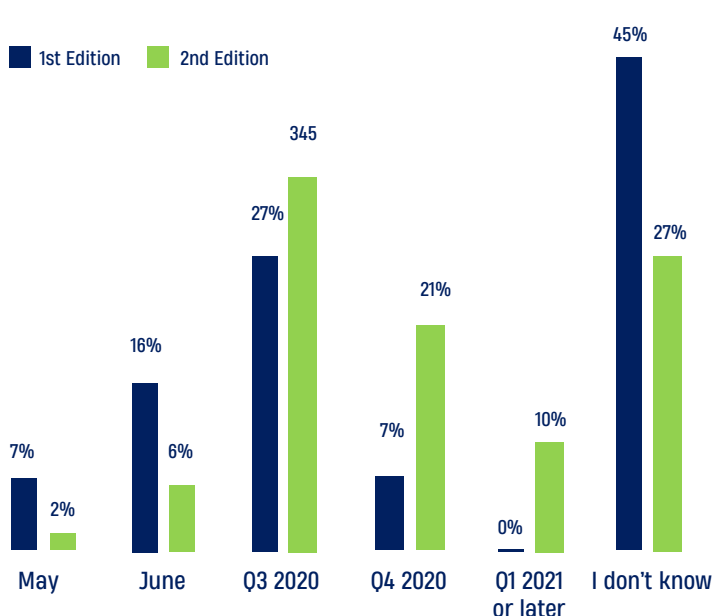
PART 2

PROGRAMS SHUTTERING

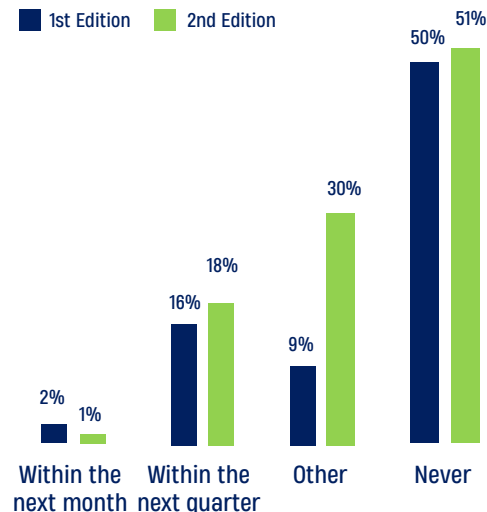
For some good news, or at least for some clarity – which seem one in the same at this point – digital influencer programs seem to be back on the horizon for travel PR professionals. While the first study reported more ambitious restart dates alongside massive uncertainty, this time, the uncertainty level has reduced (to 27% from 45%) and PR professionals seem to anticipate seeing influencers in destinations again beginning in Q3 of this year. More than half of all respondents believe these programs will restart between Q3 2020 or Q1 2021, suggesting an eventual return to digital influencer programs, though it seems that it will be some time before Instagrammers and TikTok creators will be earning money from their posts.

Still looking externally, travel PR still is unlikely to be looking for freelance content writers anytime soon, with Q3 looking like the absolute earliest (with just 18% of respondents). These findings suggest that much of the writing and content production will be created in-house for the foreseeable future, if at all.

Visiting journalist programs and digital influencer programs are shutting down nationwide. At this time, when are you envisioning commencing these programs again?



When do you anticipate purchasing any travel freelance writing (for your blog, website or other material)?



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PART 2

PITCHING WILDLY

In this second report of travel PR, we see that more professionals are sending out pitches to the media, up to 59% from 45% in March 2020. This signals progress and, above all, hope that the travel industry is poised for a rebound in the coming months. While 41% of respondents are still not actively pitching to travel journalists, the increase in pitching is a solid sign.

When it comes to what sorts of stories they are sending, travel PR has increased its proportion of COVID-19 resiliency stories, with 58% of respondents pitching these. There are also significant increases in lifestyle topics, illustrating a pivot from traditional travel topics. The report also saw a rise in personality-driven features and interviews with destination representatives. A large increase in travel news also suggests that the travel media may be getting hungry for more news about the industry and what will be happening as the world enters a post-COVID-19 travel landscape that none of us have ever trod before.

Are you currently pitching any editorial angles to media?

■ Yes ■ No

1st Edition



2nd Edition



What sorts of stories are you pitching to the travel press?

■ 1st Edition ■ 2nd Edition

COVID-19 resiliency stories



Fall travel story ideas



Lifestyle story topics



Personality-driven features



Other



Interviews with destination representatives



Summer travel story ideas



Travel news topics



Virtual travel



Destination features



None of the above



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PART 2

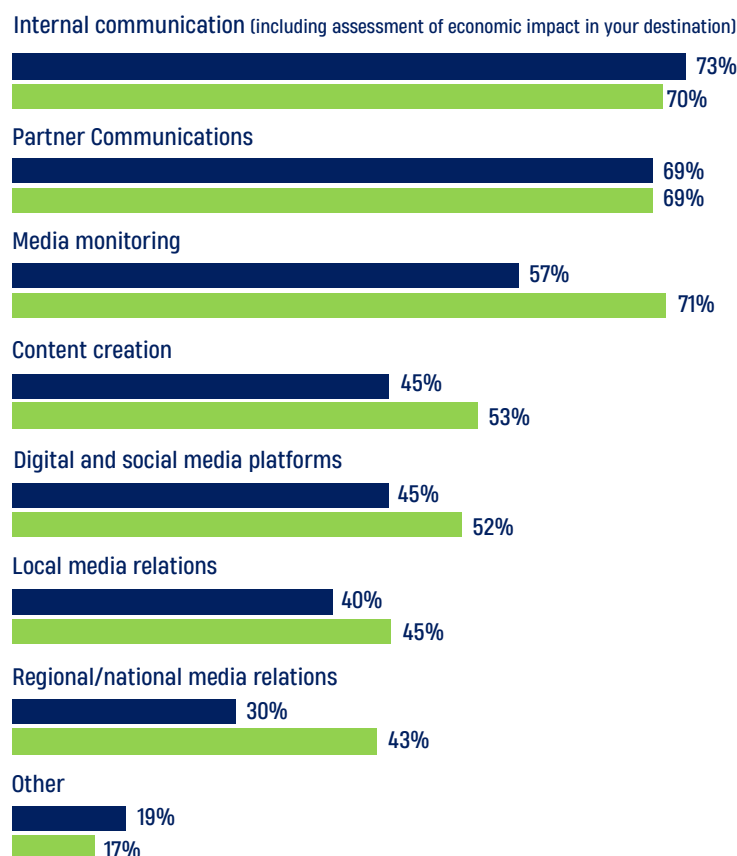
THE DAILY GRIND

And finally, we're seeing that a lot of travel PR has gotten back to work, in the traditional sense, with upticks in media monitoring, content creation, social media use, and media relations on both local and national levels. All of these indicators are positive ones, illustrating how the grinding halt just a few weeks ago has eased and the travel industry's gears are once again moving, even if a bit more strained than before.

Seeing activity among travel PR professionals is yet another of the many signals that the industry will rebound, but it remains to be seen how quickly all of these efforts will bear fruit. There are still huge restrictions – politically and socially, among others – that are preventing consumers from traveling. This work by travel PR professionals is likely more of an easing back into the workflow that they knew before March, addressing the new challenges that are still ahead of us all.

What is currently taking up your day? (Choose all that apply)

■ 1st Edition ■ 2nd Edition



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PART 3



INSPIRING TRAVEL
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TRAVEL MEDIA AND PR IN CONVERSATION

Both of these views – from media and travel PR – signal hope. While few ever imagined that tourism would become extinct, it is clear now more than ever that the industry needs to evolve and adapt to the new challenges presented by COVID-19. Creative and careful collaboration between the media and travel PR is an important step in making sure destinations around the globe attract waves of travelers in the safest and most responsible way possible as the industry undergoes its own Renaissance.

One major takeaway between the two studies, however, is that journalists and travel PR might not be collaborating as effectively as possible to these ends. Notably, these studies – conducted at the same time – reveal that travel journalists want stories about the future of travel while many travel PR were still, even increasingly, relying on COVID-19 resiliency stories. Our first round of studies found a similar disparity between what one group wanted and the other was providing.

Without suggesting that these groups are at odds with each other, this study does make clear that better communication – even *new* means of communication – are needed going forward to make sure both parties are meeting their objectives.

We haven't created a template, but it's fair to ask if there are sufficient means for travel journalists to express to travel PR what they need, the stories they want, and the angles that they would rather not have. Is there a forum, a



ONE MAJOR TAKEAWAY BETWEEN THE TWO STUDIES, HOWEVER, IS THAT JOURNALISTS AND TRAVEL PR MIGHT NOT BE COLLABORATING AS EFFECTIVELY AS POSSIBLE TO THESE ENDS.

direct line of communication, a system in place to make sure travel PR are absolutely in-step with their journalists and media networks?

The challenges faced by COVID-19 and its ever-changing media trends underscore that we can all do better, and hopefully moving forward, we can begin to brainstorm and build more efficient ways of collaborating to help each other achieve our goals, to create solid content and tell the destination stories that help drive the tourism industry.

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SATW MISSION: TO INSPIRE TRAVEL THROUGH RESPONSIBLE JOURNALISM

SATW is a professional organization comprised of the travel industry's most experienced journalists, photographers, editors, broadcast/video/film producers, bloggers, website owners, public relations experts and hospitality industry representatives from the United States, Canada and beyond. Founded in 1955, SATW has more than 1,000 members. Our members are content creators that contribute to some of the most influential print, digital and broadcast platforms. Our members are also travel and hospitality brands and the public relations agencies that represent them. SATW is

the premier networking organization bringing all of those professions together. Since all applicants must agree to the organization's Code of Ethics policies SATW is able to maintain the highest level of professional excellence among its members.

To learn more about SATW, visit: satw.org

ABOUT DCI: THE LEADER IN MARKETING PLACES

Development Counsellors International (DCI) is the expert in how North American travelers and business executives select destinations. We partner with destinations to increase visitor arrivals, disperse visitors, augment daily spend and increase business investment. Since 1960, we have worked with more than 500 cities, regions, provinces, states and countries from our offices in Canada and the United States.

Development Counsellors International
www.aboutdci.com