



StayNTouch ReviewPro fuel

COVID-19

HOTELIER

SENTIMENT STUDY

HOTEL SENTIMENT STUDY INTRO



The social and economic fallout from the COVID-19 pandemic has rocked the travel and hospitality industries. Deep customer concern over the spread of the virus, coupled with local, national and international social distancing regulations and travel restrictions have severely depressed demand for travel in 2020.

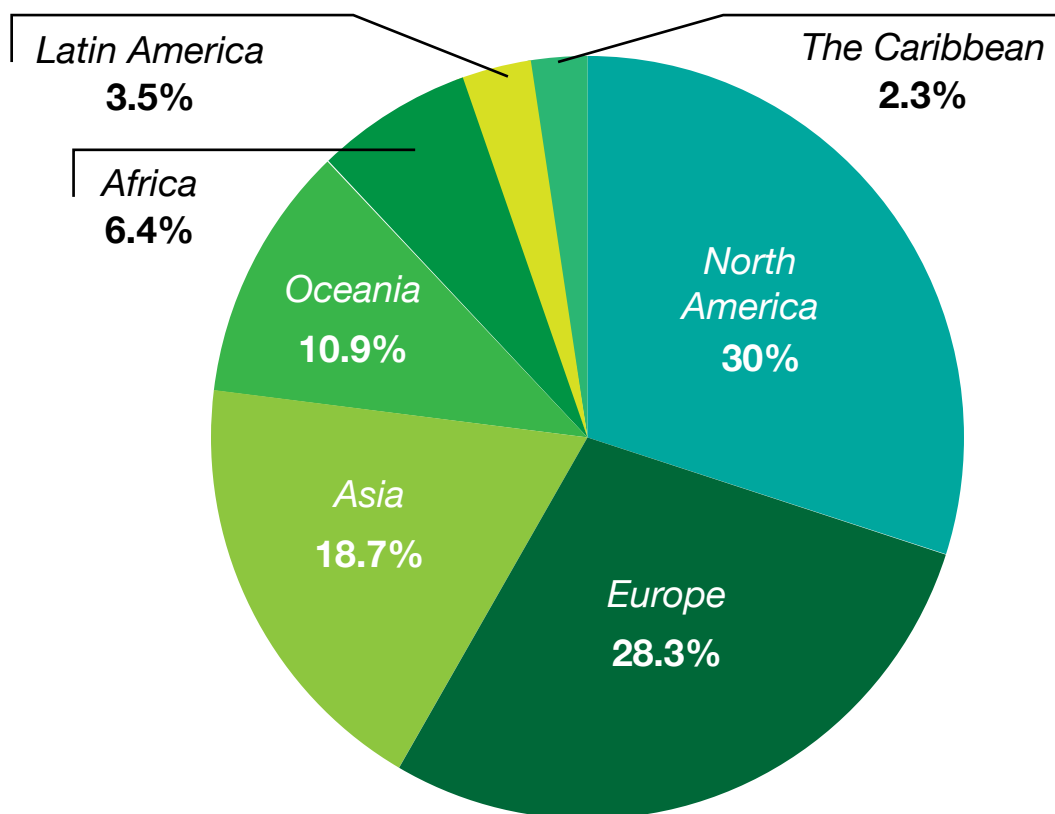
The purpose of this study is to understand the impact of COVID-19 on the hotel industry, the actions that have been taken to mitigate economic risks, how hoteliers

are preparing for recovery and their sentiments on the recovery phase. This study also identifies ways hoteliers can capitalize on opportunities presented in the “new normal” of travel and hospitality.

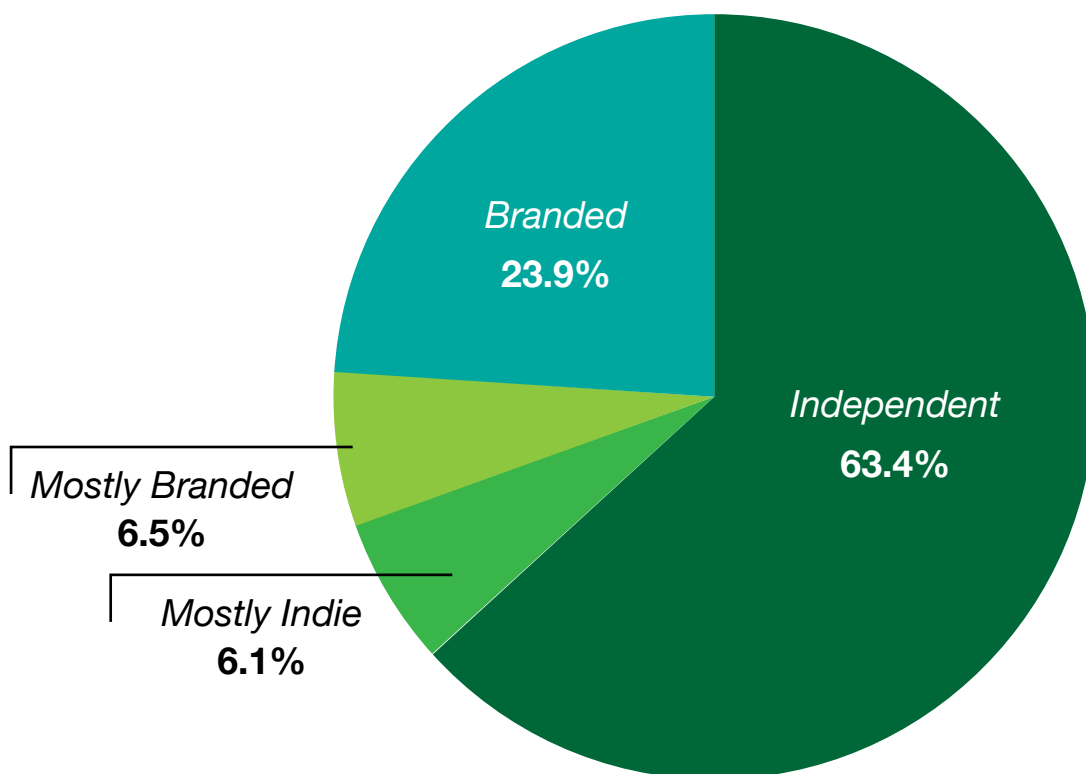




Q1: Where is your Hotel or Company based?

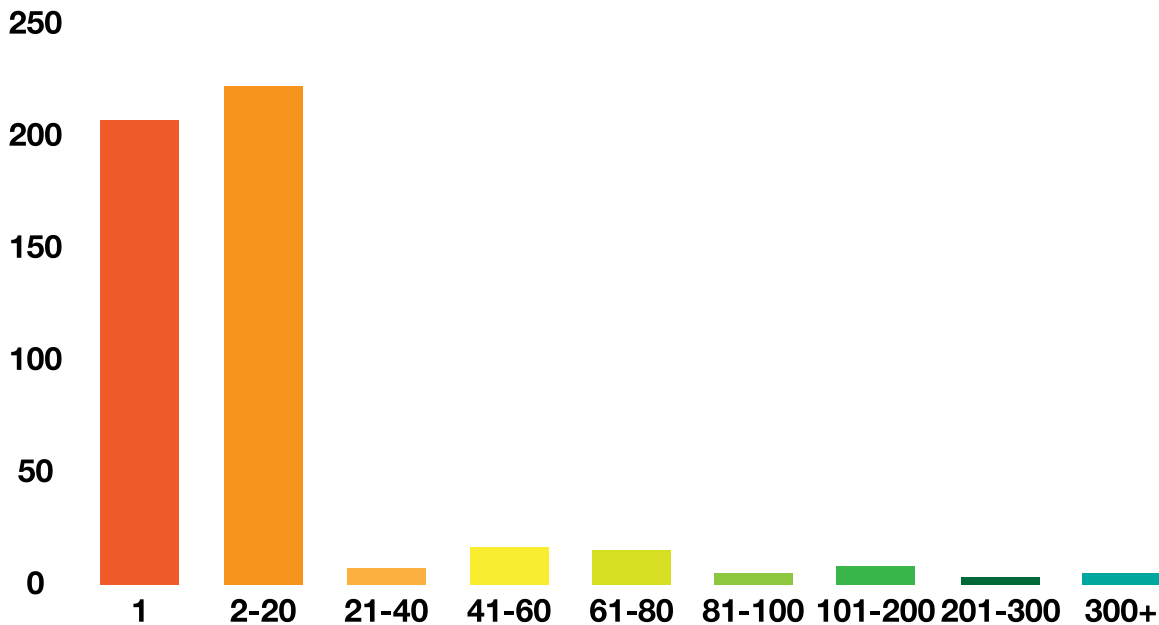


Q2: Are your hotels branded or independent?

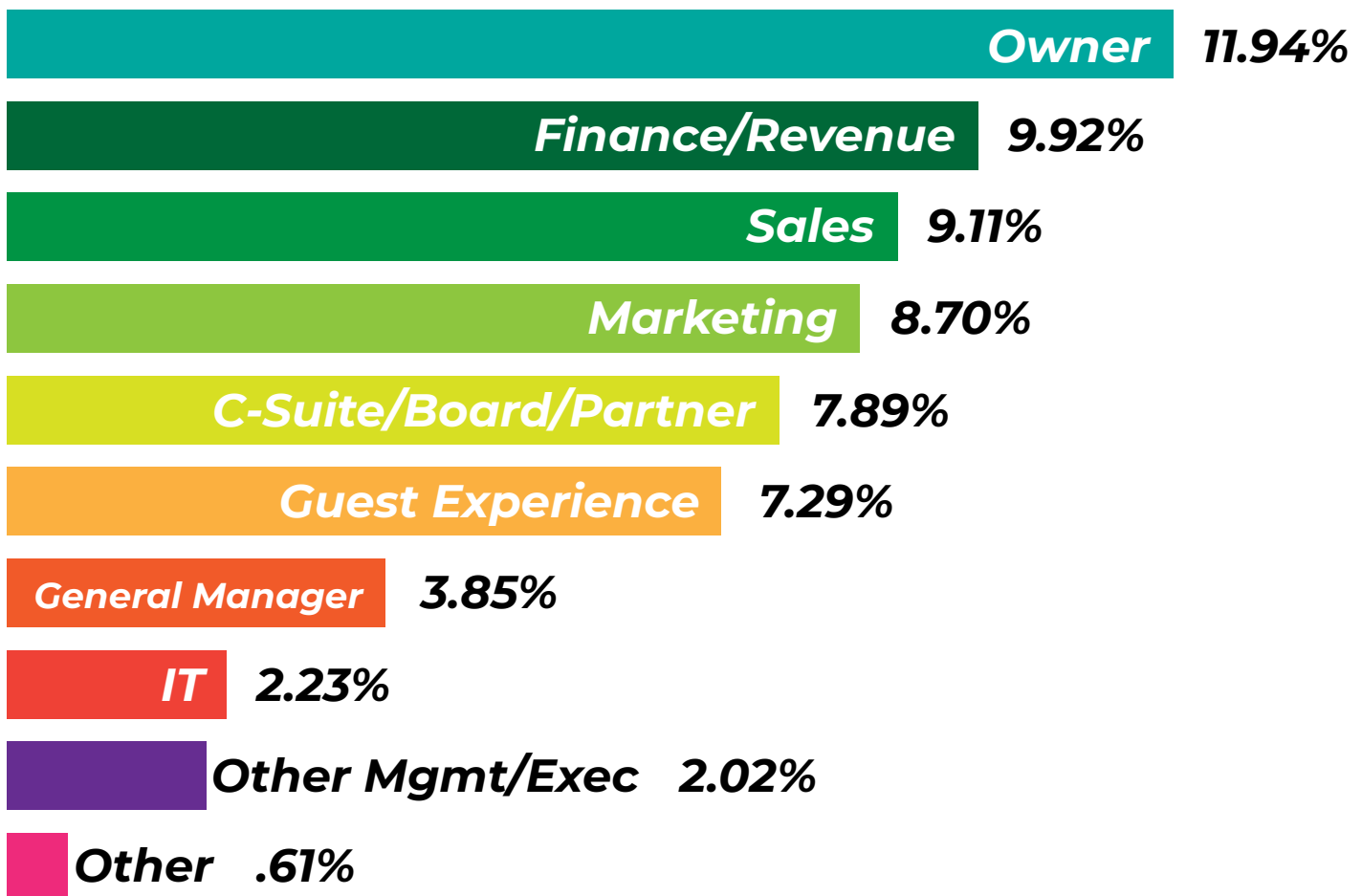




Q3: How many properties do you have?



Q4: What is your job function?



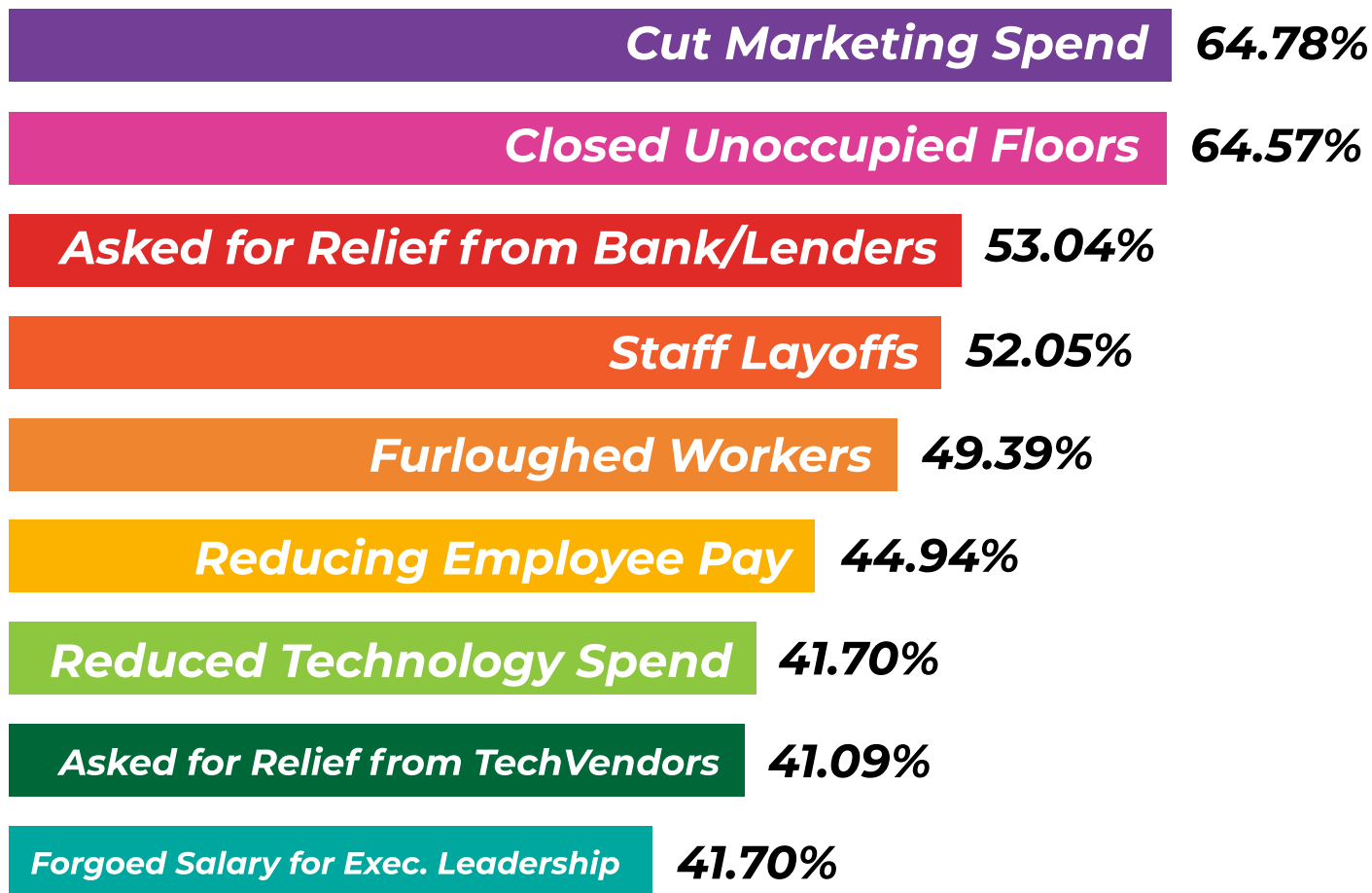
Out of the 494 hoteliers that were surveyed in this study, two thirds of respondents are based in North America and Europe, with about one-fifth in Asia and another 10% in Oceania. Almost 70% of hotels are either independent properties or have mostly independent properties in their portfolio, while a little over 30% represent branded hotels or have mostly branded properties in their portfolio. While 60% of respondents represent multiple properties, 88% of respondents had 20 or fewer properties. Approximately 40% represented single properties. A plurality of our respondents (36.4%) were involved in operations.

Almost 12% are the owners of their own property or brand, while an additional 7.89% were either in the C-Suite or on the board of directors. Slightly less than 10% are involved in finance/ revenue or sales. Although there is broad variance in our sample set, our typical respondent works in operations for a single independent hotel or independent hotel group.





Q5: What cost reduction strategies have you put into place since the COVID-19 crisis?



The fallout from COVID-19 has disproportionately affected the hospitality and travel industries. This is reflected in our respondents implementing broad, overlapping cost-reduction strategies to deal with the pandemic. Almost two-thirds of our respondents cut marketing spend (64.78%) and closed unoccupied floors (64.57%). While closing unoccupied space to save on energy and operational costs would seem intuitive, the decision to cut marketing spend might be at least partially due to a sampling bias: 34% of our respondents listed their job function as operations, while only 9% were involved in marketing. Roughly half of our respondents pursued staff layoffs (52.02%), or furloughed workers (49.39%). Almost 45% of respondents chose to reduce employee pay, while only a third of respondents' executive leadership chose to forgo their own salary (35.63%).

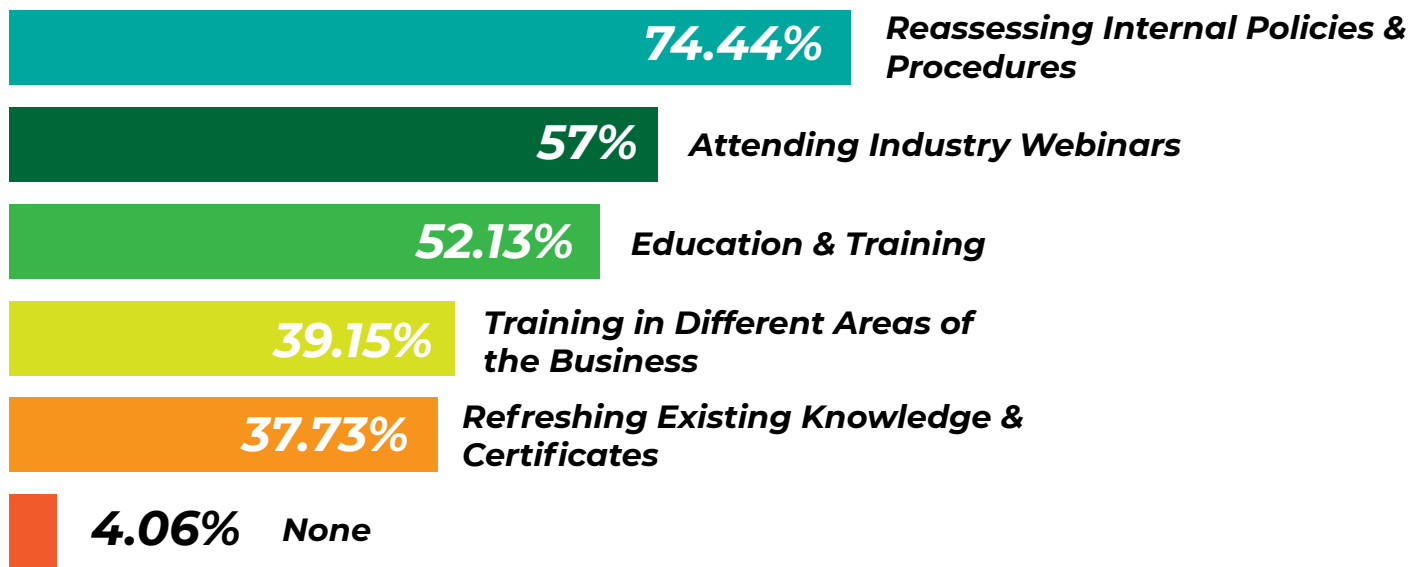
A significant number of respondents have reduced spending on technology (41.70%) or asked for relief from tech vendors (41.09%). While this approach might reflect a short-term economic necessity, long term, reassessing their technology strategy is necessary for hotels to better adapt to a post-pandemic environment. Hoteliers should take this

time to reassess their technology budget and priorities, and pursue technologies that will prepare their business to better respond to future health crises (while continuing to enhance guest personalization and convenience).

Similarly, with so many companies pulling back on marketing efforts, the price of advertising has dropped significantly, even as it continues to yield solid returns. If properties have scaled back their brand PPC and/or meta data advertising (GHA< TripAdvisor, etc), now would be the time to begin refocusing on those initiatives. (See Question 7 for further analysis.)



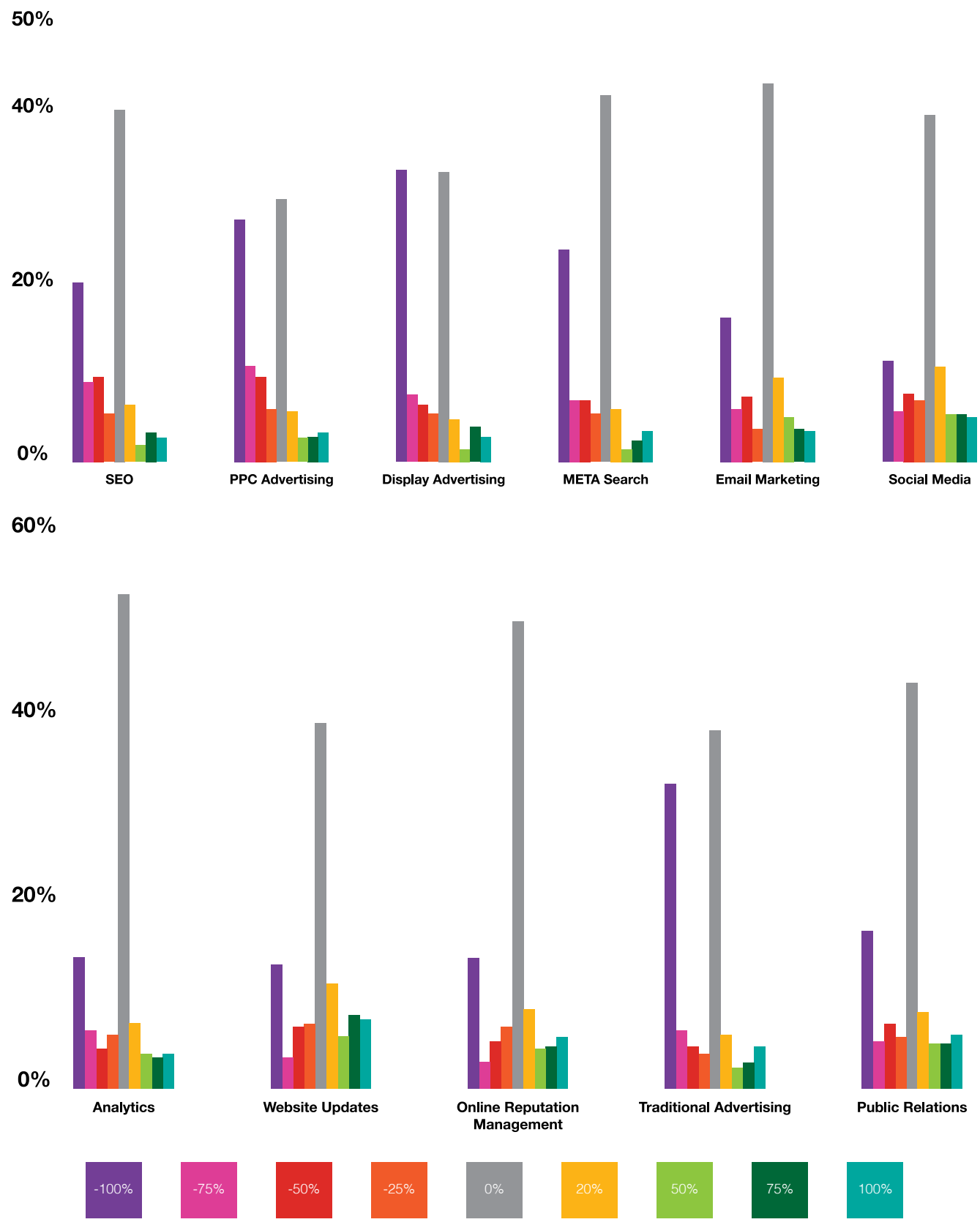
Q6: To prepare for reopening, are you recommending any of the following to your team?



Almost three-fourths of respondents indicated that they would reassess internal policies and procedures in preparation for reopening. As indicated by Questions 18 and 19, many of these policies will revolve around enhanced cleaning and social distancing measures. Employee training is also a priority, with 57% of respondents recommending their staff attend industry webinars, and 52.13% recommending educational programs. Only 39.15% of hoteliers are advising or supporting their staff's cross-training into different areas of the business, which is interesting, given the level of layoffs and furloughs given in Question 5 and 15. If a property has to reopen without a full team, it would be advantageous for the remaining staff to be able to fill multiple roles, at least on a minimal level. Additionally, gaining a more holistic understanding of their business would help employees better perform at their core functions. Vendors should take this time to emphasize education and training to hotel customers using their platforms, and hoteliers should certainly take advantage of these educational offerings. Hoteliers should also use this opportunity to encourage or mandate cross-training, so that they can close any gaps left from layoffs or furloughs.



Q7: How much have you increased or decreased your budget for the following marketing initiatives during this crisis?

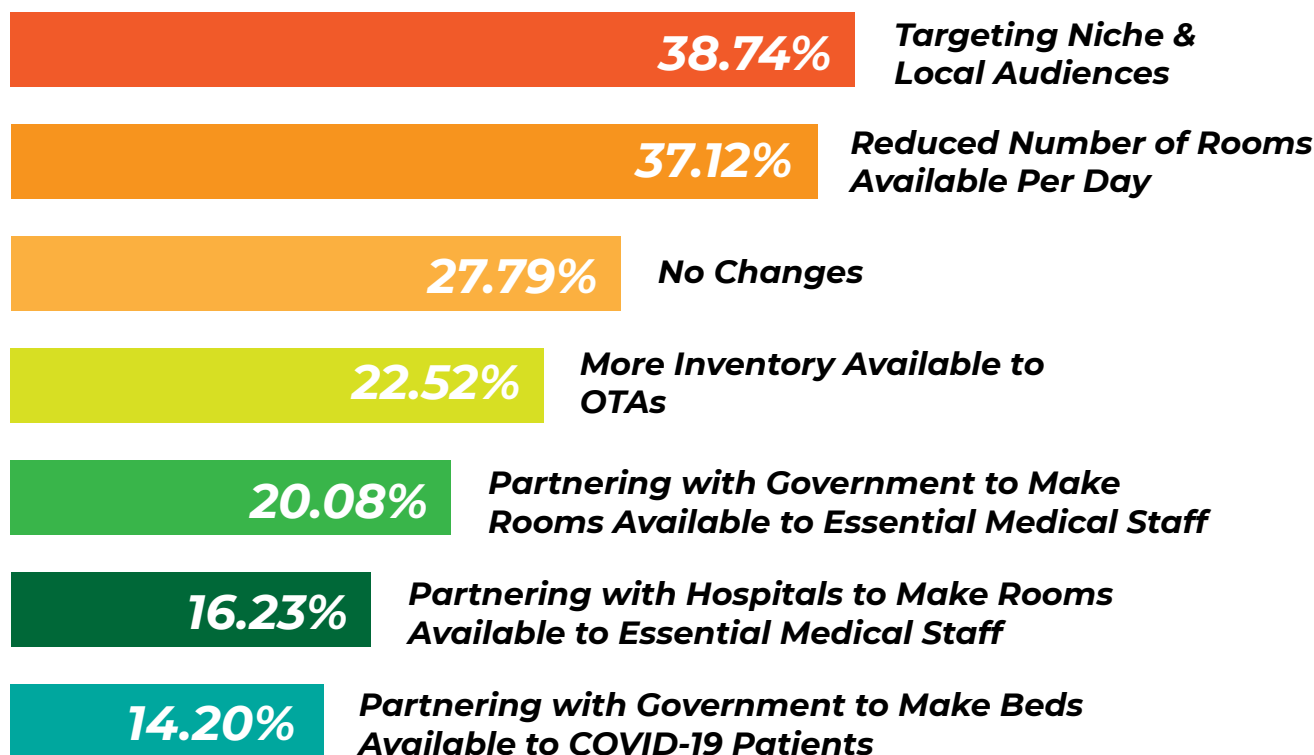


Although Question 5 highlighted marketing as the leading budget item cut in the wake of the COVID pandemic, when we drilled down to specific marketing initiatives, we discovered that a plurality of respondents indicated no change in each segment of their marketing budget. More respondents cited cutting rather than investing, however, with traditional advertising, display, and PPC receiving the greatest amount of budget cuts. Website updates, social media and online reputation management saw the greatest increase in budget. All of this is indicative of hoteliers making due on smaller marketing budgets, and may also point to an increased reliance on the “billboard effect” delivered by OTAs. In fact, Question 8 shows that 22.5% of respondents are making more rooms available to OTAs since the onset of the crisis.





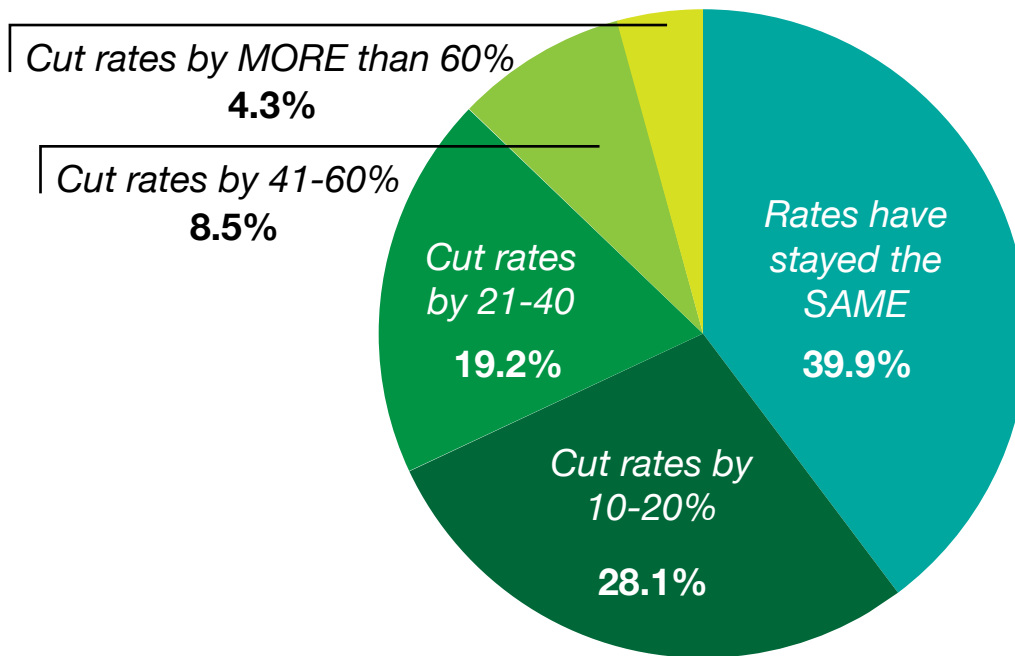
Q8: How has your room distribution strategy changed?



A plurality of respondents (38.7%) indicated that they would shift their distribution strategy to focus on more niche and local audiences –which corresponds with other analyses that indicates post-COVID travel will be more local in nature. A second plurality of respondents (37.12%) noted that they would reduce the number of rooms available per day –corroborating the findings of Question 5 which listed closing unoccupied floors as a leading cost reduction strategy. Interestingly, over a quarter (27.79%) of respondents indicated that they would make no changes to their distribution strategy. There were a few options which hoteliers seem to be under-utilizing: Only 22.52% of respondents increased their inventory with OTAs, and even fewer made their rooms available to government (20.08%) or hospitals (16.23%) to house essential medical staff or COVID-19 patients (14.20%). These latter options could provide a way to generate income (and aid the public health effort) while the pandemic continues, while diversifying with OTAs could help capture the influx of budget conscious travelers as travel restrictions begin to ease.



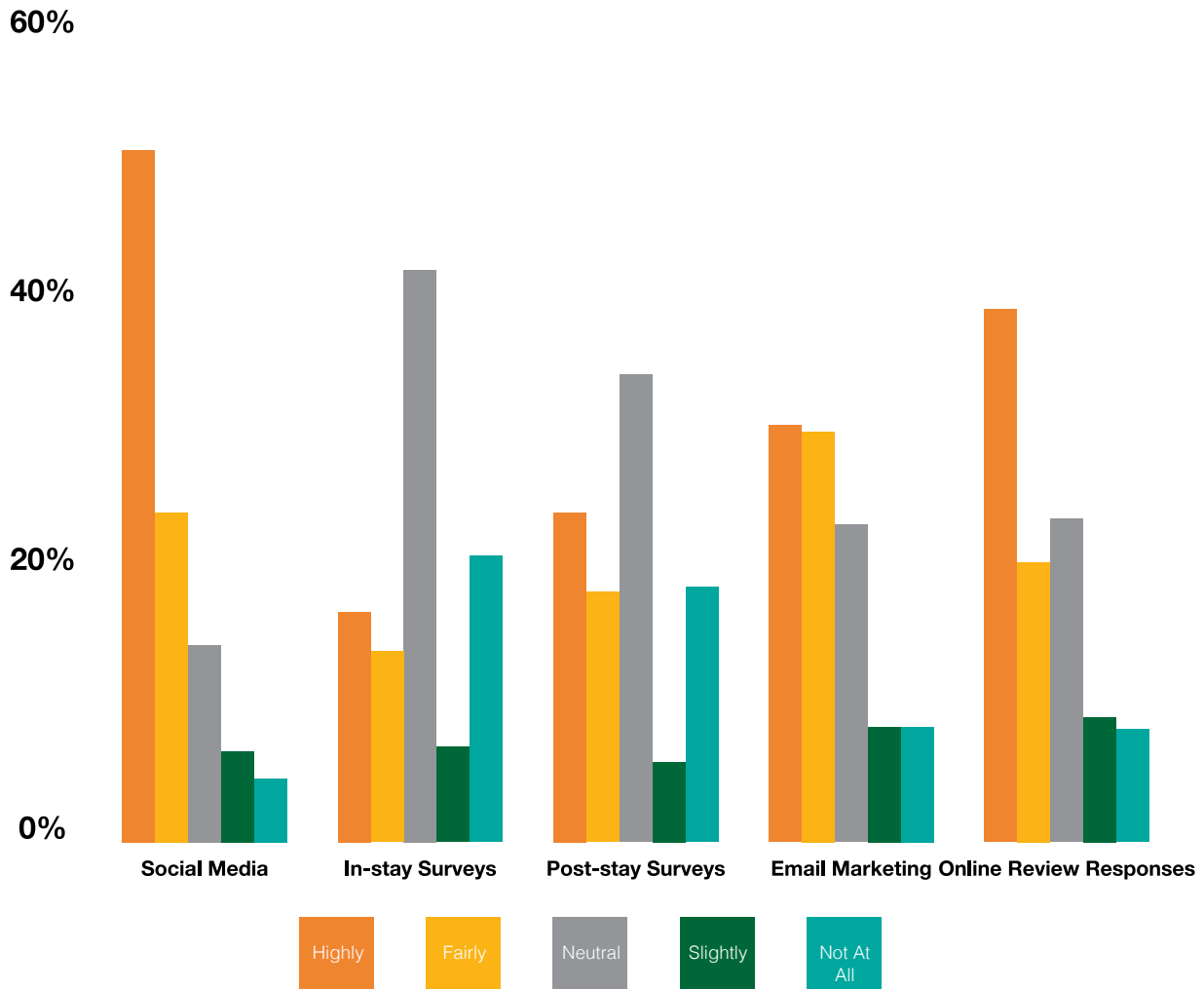
Q9: How has your pricing strategy changed?



Pervasive health concerns and social distancing regulations arising out of the COVID-19 pandemic, have devastated consumer demand in the travel and hospitality industries. Hotel rates have largely decreased as a result. Approximately 60% of survey respondents have cut their rates to some degree, and over 12% have cut rates by more than 40%. The wisdom behind aggressively slashing rates is mixed: On the one hand, demand for travel is being depressed by exogenous health and regulatory concerns, and thus will at least partially recover once travel bans and social distancing restrictions are relaxed. However, the inevitable recovery will also leave significant economic scars. Many travelers –especially those first arriving into the middle class –will face unemployment or diminished economic opportunities in the early phases of the recovery, making them less likely to splurge on leisure travel. Hoteliers should take this into account: Slashing rates too aggressively would be counterproductive, but not adjusting them at all, might price your brand out of the emerging market. Other strategies to make booking more accessible without directly cutting rates could be eliminating hidden fees to make pricing more transparent, offering more lenient cancellation policies, or promoting more generous customer loyalty offers. .



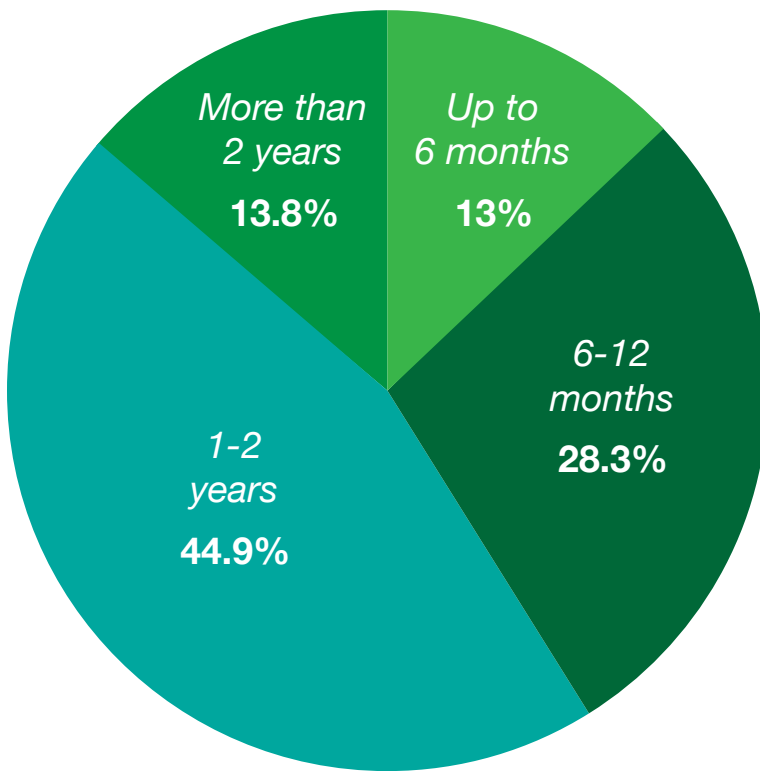
Q10: How important are the following communication channels to your current crisis communication strategy?



COVID-19 has also affected the way hotels communicate with travelers during the crisis. Around a fifth of respondents view in-stay and post-stay surveys as being not at all important. This makes intuitive sense: If guests are barred from travel in the first place, how will they be able to fill out hotel surveys? Instead, hoteliers are relying more on social media and online reviews to communicate with their customers during the pandemic. Here, 80% of respondents placed some level of importance on social media, while 60% placed some level of importance on online review responses. Email marketing also received relatively high marks, with approximately 60% of respondents viewing it as either a “highly” or “fairly” important component of their crisis communication strategy.



Q11: How long do you think it will take your business to **FULLY** recover in occupancy and RevPar?

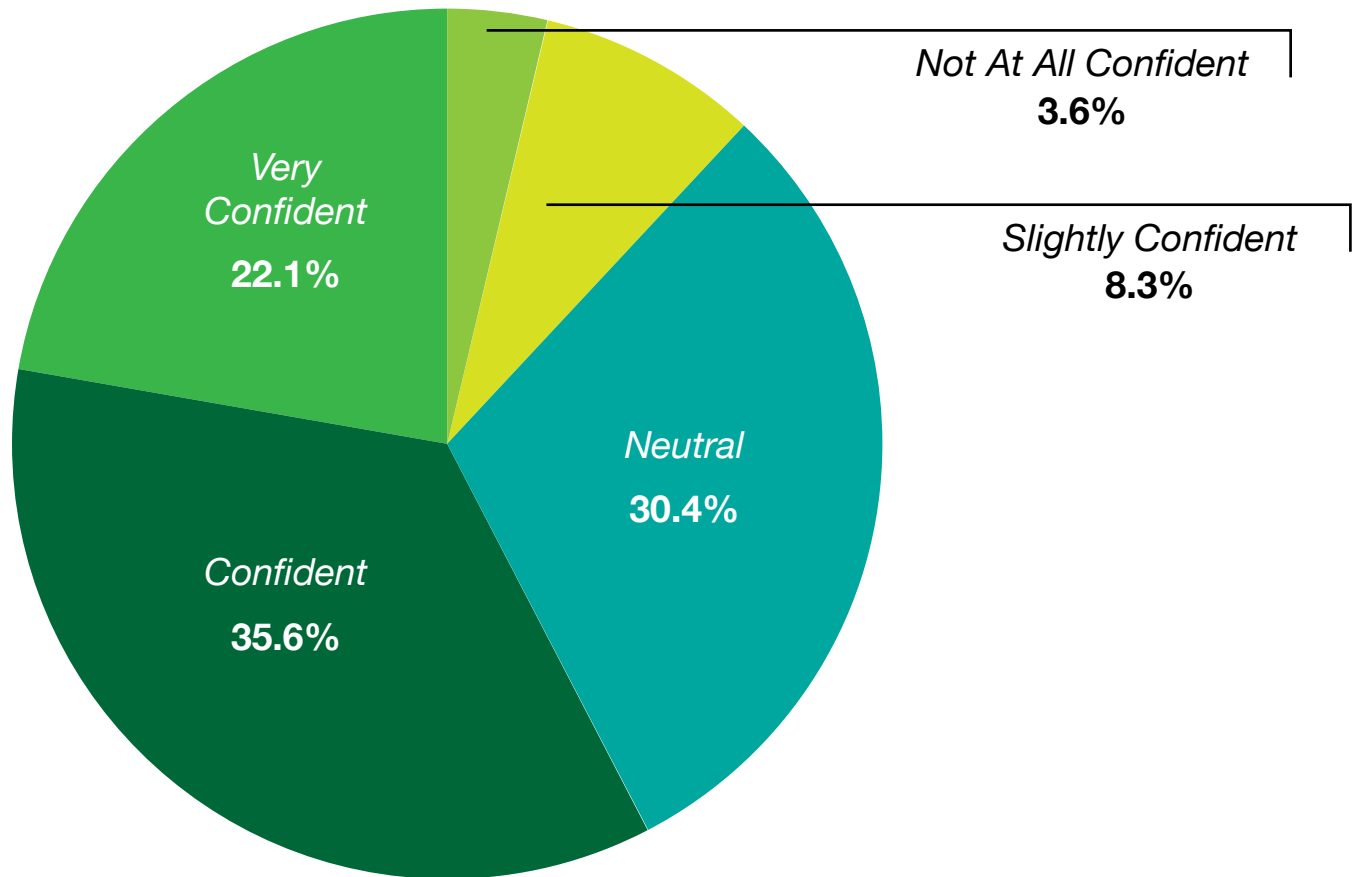


Many hoteliers remain pessimistic about the length of time until their properties fully recover in occupancy and RevPar. A strong plurality of respondents (44.9%) believe that it will take 1-2 years for their businesses to fully recover, followed distantly by 28.3% of respondents who believe the recovery will only take 6-12 months. Looking at the data another way, only 41.3% of respondents believe that the recovery will take less than one year, while 58.7% believe that it will take over a year to fully recover. Only 13% of respondents took the optimistic view that recovery will happen within 6 months.





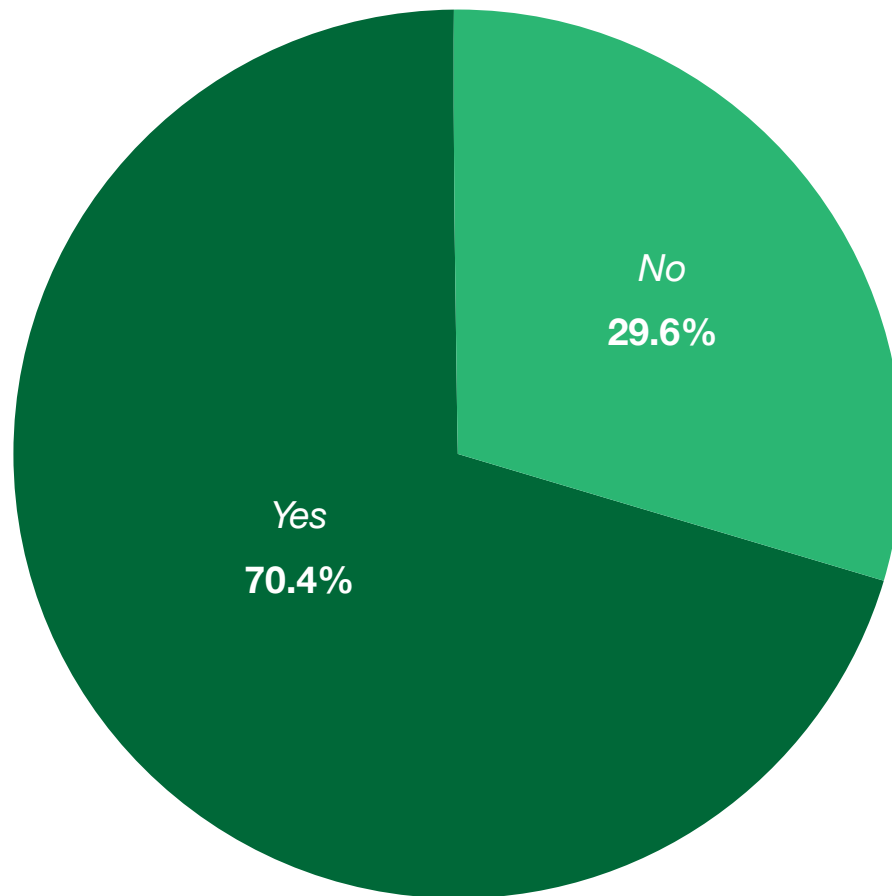
Q12: Based on your previous answer, how confident are you about your business' ability to recover?



Fortunately, 58% of respondents are either confident or very confident about their business' recovery –even if they acknowledge that a full recovery could take months or years. Only 4% of hoteliers mentioned that they were not at all confident about their business' recovery. When we compared our respondents' answers to Q12 with their answers to Q11, we found that over 71% of the 64 respondents who thought that their business would recover in 6 months, were confident or very confident in their business-es' ability to recover. For the 140 hoteliers who thought their business' recovery would take up to a year, a little over two-thirds were either confident or very confident of their success. These numbers flip somewhat for the hoteliers who don't foresee a recovery for at least 2 years: About a quarter were either slightly or not at all confident in their success, while only 41% were confident or very confident.



Q13: Do you have a recovery plan in place for your business?



Over 70% of respondents have a recovery plan in place, versus only 30% who do not. If we compare Q13 with Q12, we find a relationship between having a plan and a respondent's confidence in their businesses ability to recover: Of the businesses who were "not at all confident" in their recovery, only 55.56% had a recovery plan in place. Conversely, almost 80% of the businesses who were "very confident" in their recovery, had some kind of plan to pull them out of the crisis. It is very important to ensure that any action plan you implement is clearly documented and communicated to management and staff and supported by any necessary training. Any health and guest-related policies and procedures should also be clearly communicated through your marketing channels.



Q14: Briefly describe the plan you will undertake to prepare your business for recovery (word/phrase cloud)?



Our respondents offered a variety of strategies for our free-form question on how they would prepare their business for recovery. Some strategies focused heavily on cost-cutting, or even temporary closures until the pandemic and its accompanying travel restrictions were lifted. Others focused on enhancing their property's SOP and hygiene procedures, and some sought to completely revamp their sales and marketing strategy to try to attract new guest segments and better prepare for emerging guest expectations once travel restrictions are lifted. Some respondents chose to use the lock-down to renovate their properties, or invest in contactless, self-service technology, while others adopted a "kitchen sink" approach, focusing on rate cuts, marketing, staff training, and cost cutting measures.

EXAMPLES

Revising Marketing / Sales Strategy

Start marketing to locals first, keep ADR at same rate but offer more value by driving free upgrades, find segments that are still on the books and offer incentivized future bookings, contact all canceled reservations and offer discount to re-book, offer flexible cancellation policies, try to add-on additional stay dates through length of stay promotions to people who are still on the books for later in the year, continue to soft message encouraging messages and inspirational travel images on social media. Look to airlines for indication of routes resuming and capacity to slowly expand marketing out to more mainland and International guests. But most importantly provide informative messaging about duty of care on new cleaning guidelines and guest safety on all media channels.

-Anonymous Marketing Professional for a multi-property Independent Brand

We are changing our strategy with emphasis on local and drive-in markets for the remainder of the year, and ensuring that we are following guidelines to make sure guests and staff are safe - reducing potential liability. We are also emphasizing partnerships with hospitals and first responders and offering free rooms. This partnered with a PR effort and significant marketing push towards the end of the isolation time periods will hopefully direct people back to our hotels (mostly destination and resort-style hotels)

-Anonymous Guest Experience Professional for a multi-property Hotel Group (mostly Branded)

Focus on SOPs/Hygiene

Disposable single use toiletries only. Lidded Hamper for towels used by guests. Lidded small and large trash cans. Thorough cleaning and sanitizing of all surfaces. I have no carpet and if I did I would remove it. I have purchased 2 UV sanitizing light wands (1 to use before and after check-in and 1 as a back up) I will practice no contact check in.

-Anonymous Operations Professional for a single-property Independent Hotel



Put up sneeze guards at all the front desks; have thermometers available to check the staff on a daily basis ; Have a sanitation plan in place ; Make employees wear Masks and gloves; Keep checked out rooms unoccupied for 24 to 48 hours before bringing them back on in the inventory.

-Anonymous Finance/Revenue Professional for a single-property Independent Hotel

EXAMPLES CONTINUED

Cost-Cutting/Temporary Shutdown

During lock-down we have been closed for 4 weeks and estimate at least another 4 weeks before we are able to reopen. Most operational staff have been furloughed on government schemes with us just keeping a skeleton sales and marketing and senior management team to work on our crisis management strategy. Marketing spend has been reduced along with other non essential overheads. When we can reopen, it will be gradual with not all employees coming back at once, we will implement a staggered reopening linked to occupancy and the ability to reopen the food and beverage side of the business. Our sales and marketing strategy has been adapted to focus in the short term on the domestic market and mid-term on client retention for the summer season.

-Anonymous Marketing Professional for a multi-property Independent Brand

We are currently closed and will remain until air traffic starts again. We are estimating to see our first customers at the end of October and Q4 and Q1 of 2021 is averaging a 12-15% occupancy forecast. Limiting our expenses is our short term goal and it includes layoffs however the level of uncertainty is high. The plan is to aggressively grow the Direct Bookings through SEOs etc. in order to reduce dependency on OTA who will purely drive rate in order to recover themselves.

-Anonymous Operations Professional for a single-property Independent Hotel

Renovations

Taking the time during the closure to fully renovate the front and back of house the properties and fully retrain all staff so that we reopen with a refreshed physical plant and service proposition that should see us improve our guest satisfaction and competitiveness in what we expect to be a much more competitive market.

-Anonymous C-Suite Professional for a multi-property Independent Brand

Invest in Technology

Self check in technology, maybe adding room service and take out for the restaurant, which we anticipate will not be able to operate at the same occupancy capacity. Marketing focused on nature and the outdoor activities that are available in our area. Looking to create packages that combine dining with the hotel stay, and wellness offerings if possible.

-Anonymous Operations Professional for a single-property Independent Hotel

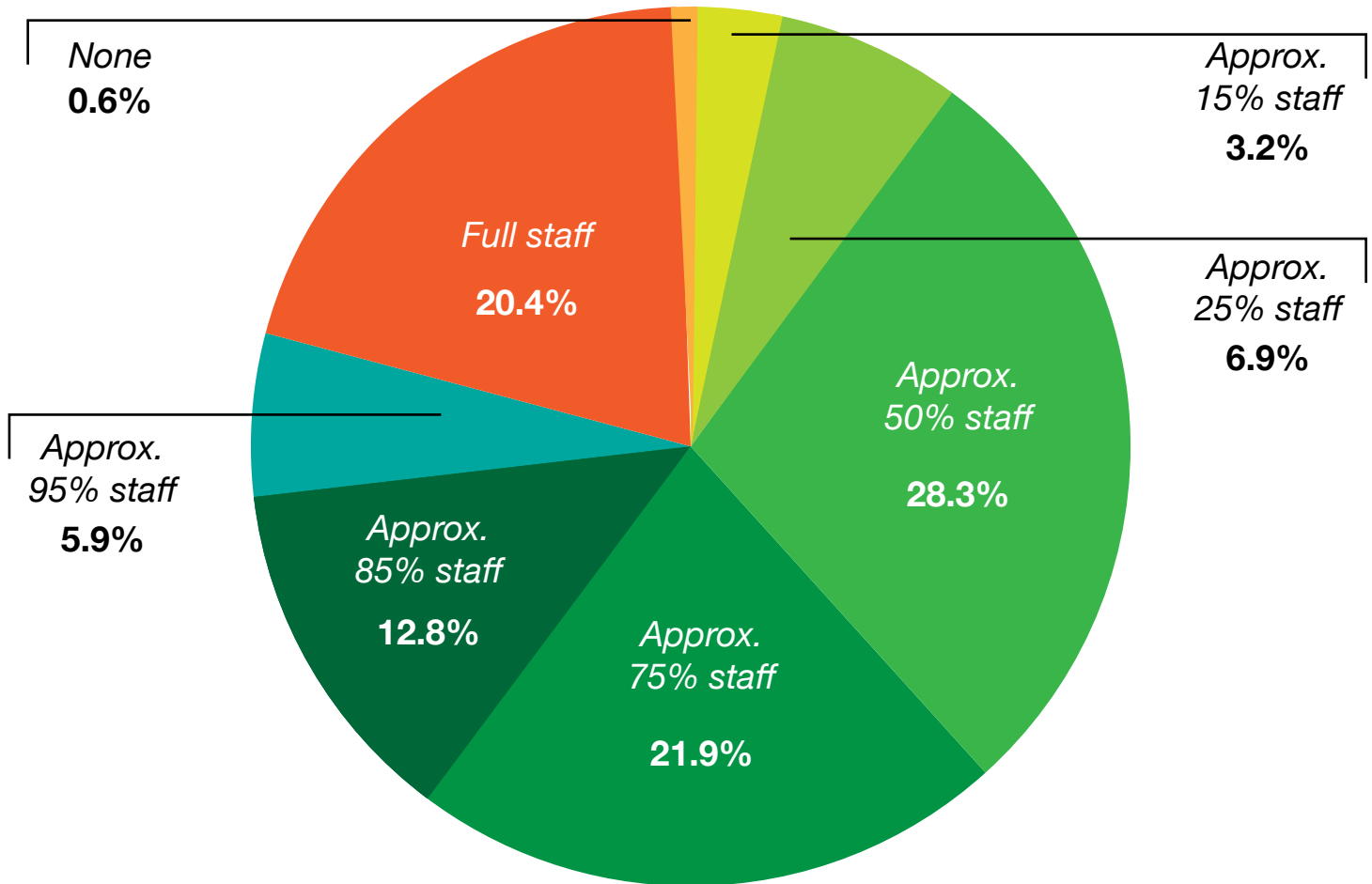
Multi-Faceted Approach

Rate cuts with add ons, communicate extensively through all media. Shoot video of entire hotel sanitization and communicate that we never got an infection. Staff training has to begin via Zoom using HODs and consultants. Rework the budget based on new rates including big focus on cost cutting by all departments, reduce capex by 90%. Reduce all salaries by 60%. Target local corporations aggressively with marketing and offers.

-Anonymous Operations Professional for a single-property Independent Hotel



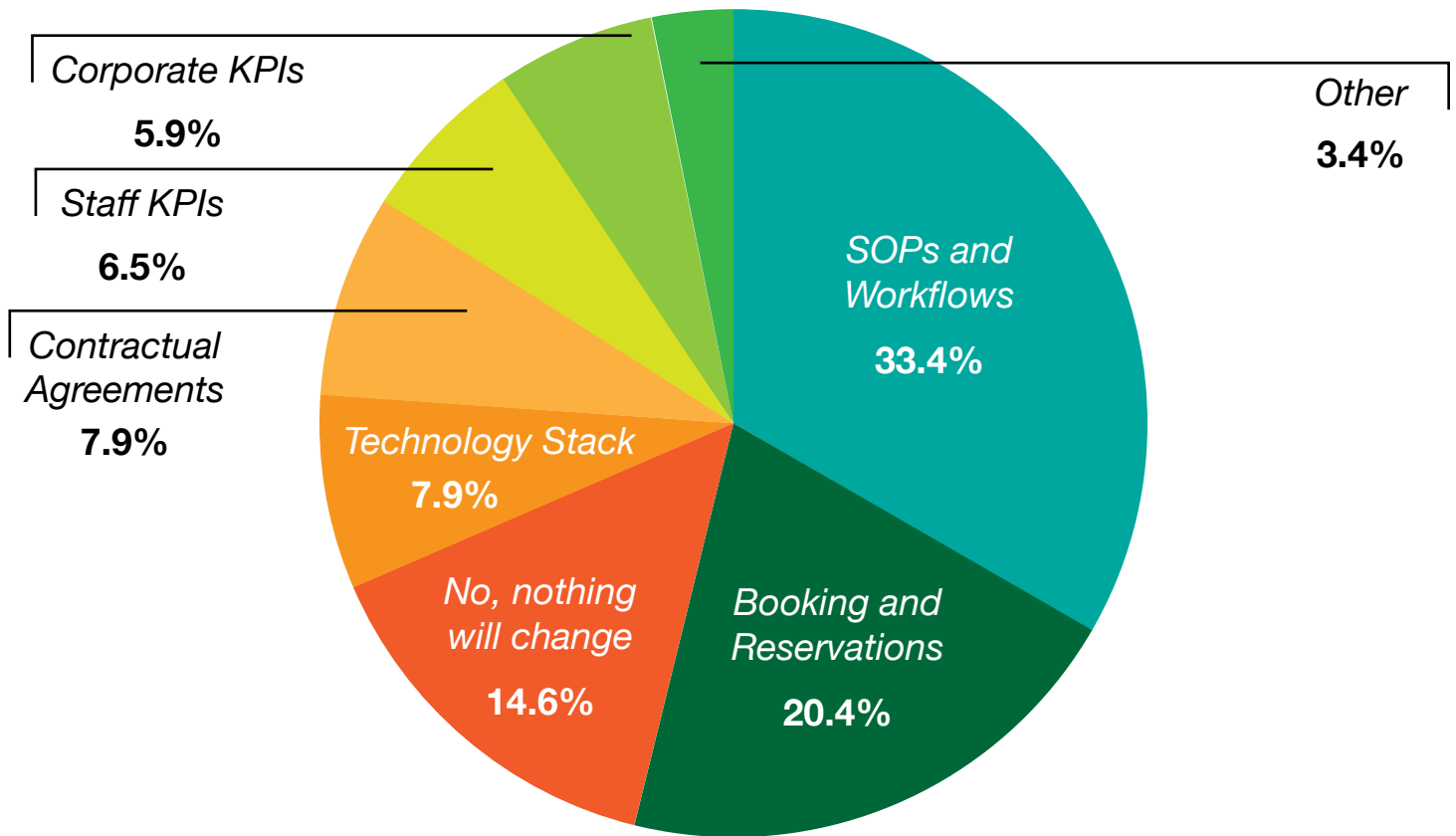
Q15: What percentage of your staff, pre-COVID-19, do you plan to operate with post-COVID-19?



A supermajority of respondents (80%) indicated that they would be reopening without a full team, although there is some variation in their responses. About half of hoteliers will be reopening with 25-50% less staff, while almost 11% will be operating with about a quarter of their staff or less. All of this points to a need for self-service and automation technologies to combat any operational inefficiencies due to reduced staffing. It is also vital that hotels train staff on any new policies, procedures or technological platforms that are implemented, so that guests never feel under serviced or are exposed to operational friction.



Q16: Do you believe that the structure of your business operations will permanently change post-COVID-19? If so, which items will change:

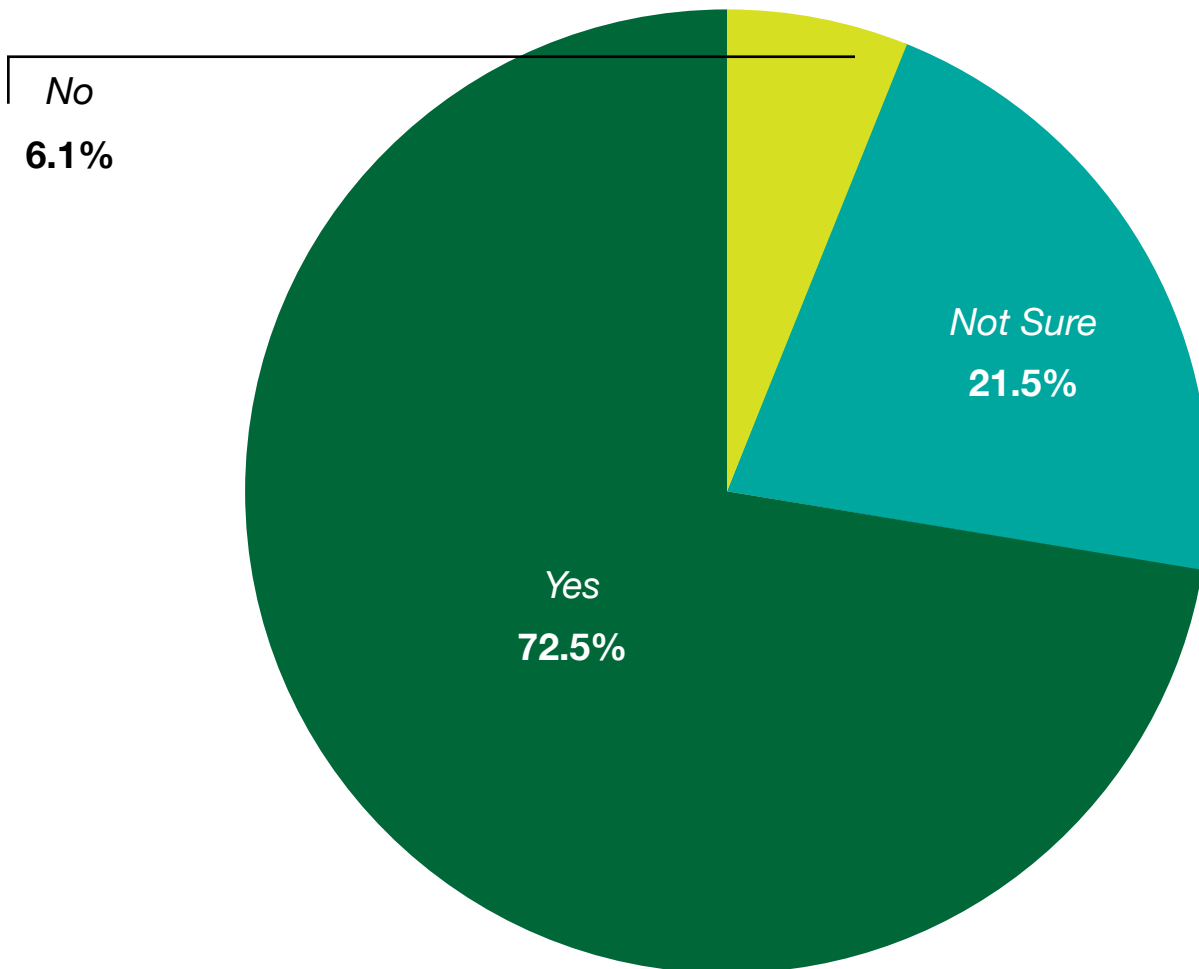


While the travel and hospitality industries will eventually recover from the economic fallout wrought by COVID-19, business will have to adapt to a “new normal” of social distancing and enhanced hygiene. Approximately one-third of our respondents said that they will have to make permanent changes to their SOPs and workflows to adapt to the post-COVID world, followed by 20% who said they will change their booking and reservation policies. Surprisingly, about 15% of respondents believed that nothing would change in their business post-pandemic.

When adjusting SOPs and workflows, it’s important to clearly document and distribute any changes to management and staff, and provide ongoing training to support the implementation. Additionally, any changes to booking and reservation policies, as well as cleaning and hygiene procedures should be clearly communicated to staff, and marketed to guests through all available channels. Given the newfound customer demand for social distancing and cleanliness, hoteliers might also consider incorporating any enhanced hygiene policies more directly into their brand image and core messaging.



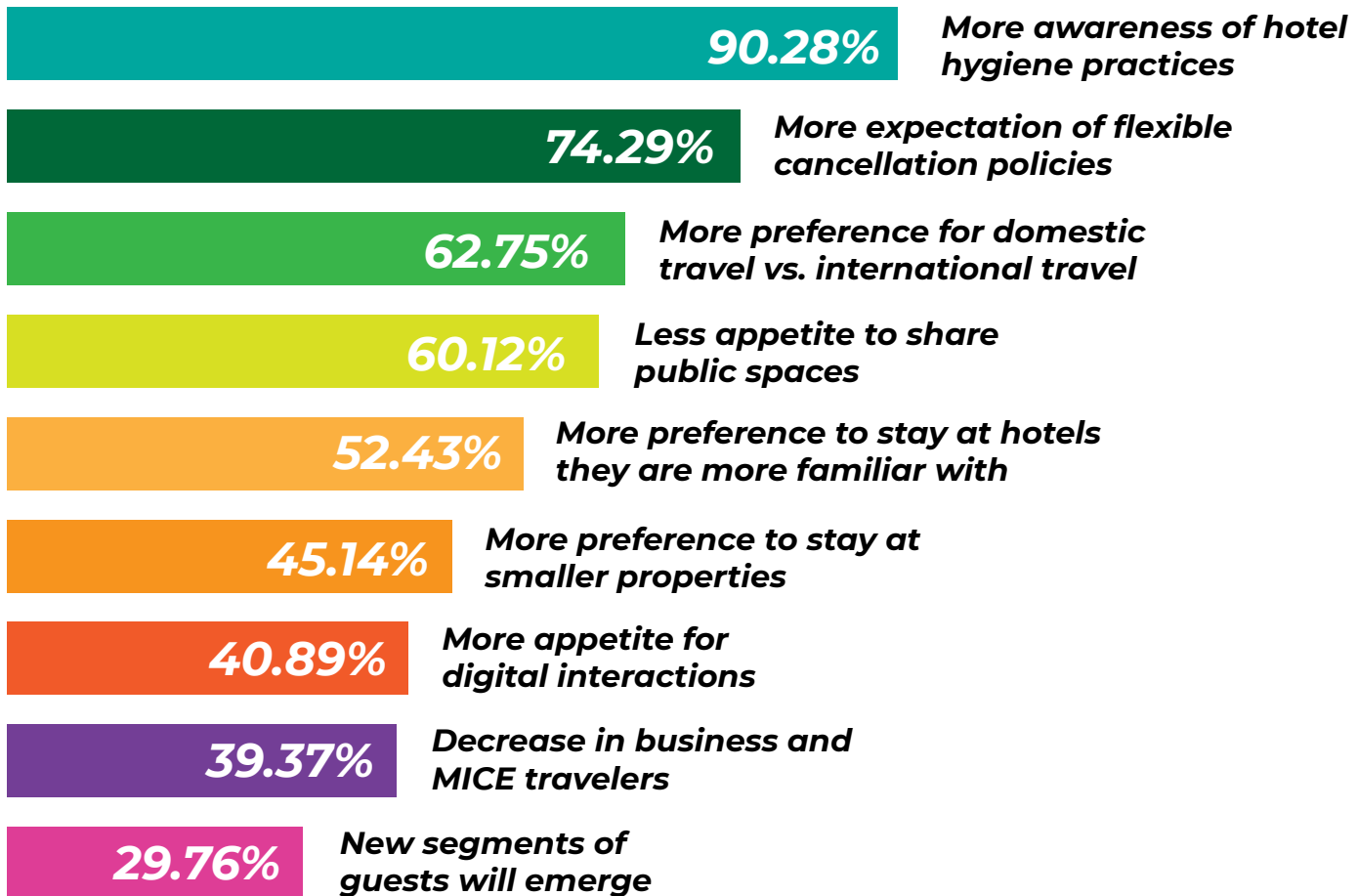
Q17: Do you believe that guest behavior and expectations will permanently change post-COVID-19?



According to our study, almost three-quarters of hoteliers believe that guest behavior and expectations will permanently change post-COVID-19. Of course, this result creates more questions than answers: Exactly how will guest behavior change, and how can we predict which changes will occur and when? How can hoteliers remain flexible and informed, so they can better adapt to the unknown? What opportunities can hoteliers use to capitalize on travel's "new normal" post-COVID? While coronavirus is unique in terms of recent pandemics, it's not without historical analogies or precedent. After 9/11, the travel industry was gripped with the fear of international terrorism, but they effectively responded with enhanced security procedures at airports. In time, the travel industry adapted to the "new normal," while also fully recovering in terms of revenue and ridership. A similar scenario will likely unfold with COVID-19: As hotels adopt a contactless guest experience, enhanced cleaning and hygiene procedures, and more transparent booking and cancellation policies, they will be able to survive –and thrive! – in the post COVID environment.



Q18: How do you believe guests' behavior will be impacted?



How will guest behavior and expectations change in the post-COVID world? Over 90% of respondents believe that guests will be more sensitive to hygiene policies, while 74% believe that guests will expect more flexible cancellation policies. A strong majority of respondents believe that guests will prefer domestic to international travel (62.75%) and will be less willing to share public spaces (60.12%). A majority of hoteliers also believe that guests will prefer to stay at familiar hotels (52.43%), while 45% believe that guests will prefer smaller properties to larger ones. A little over 40% of respondents believe that guests' appetite for digital interactions will increase (40.89%), while 39.47% think that there will be a de-

crease in business and MICE travelers. Almost 30% of respondents believe that entirely new segments of guests will emerge post-pandemic.

What does this all mean for hotels? Obviously, it will be critically important to adopt enhanced hygiene procedures and flexible and transparent booking policies during the recovery. Hotels should make a point to emphasize their cleanliness and hygiene protocols in all of their marketing outlets, from the hotel website, to OTA listings, and social media posts, especially capitalizing on hygiene-related keywords. Hotels will also have to rethink public and co-working spaces, and invest in contactless technology to better promote social distancing. This can include mobile check-in/check-out, keyless entry, and mobile messaging for staff and guests. While hoteliers may have to make up for a drop in business and MICE travel, smaller independent and boutique hotels may benefit from the increase in local and rural travel. This would also be an opportunity for hotels to enhance loyalty and rewards programs to drive more direct bookings, and foster partnerships with local restaurants and attractions to gain additional streams of income for booked experiences by their guests.



Q19: In the order of priority, which guest-facing practices will be MOST important to your business post-pandemic?

- 1** *Enhanced housekeeping policies*
- 2** *Increased common space cleaning*
- 3** *Updated F&B policies and procedures*
- 4** *Reduced staff/guest physical interactions*
- 5** *More digital guest touchpoints*
- 6** *Encouraging and monitoring online reviews*

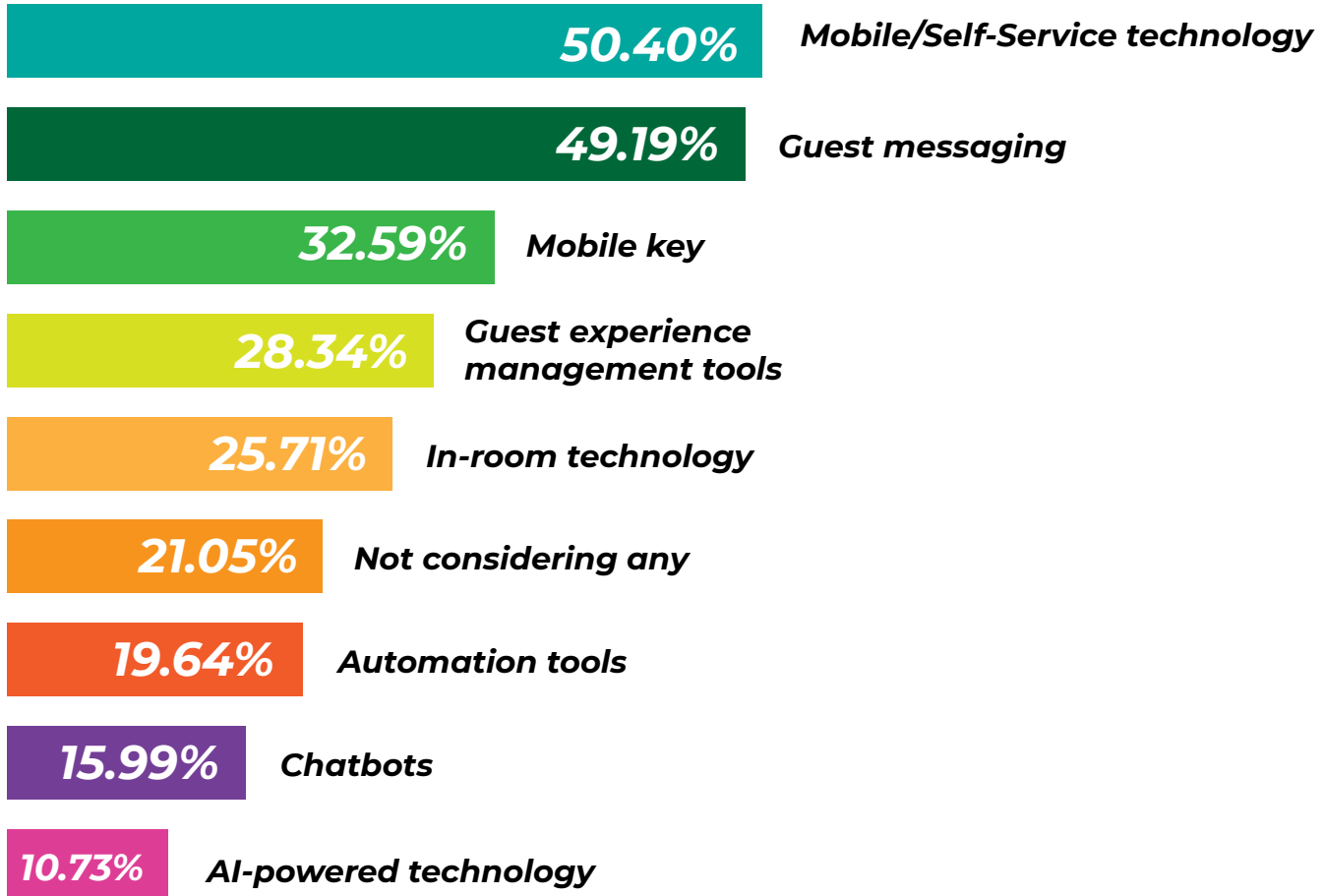
We arrived at this ordinal ranking of guest-facing priorities by compiling a weighted average of our respondents' preferences. Although "enhanced house-keeping policies" came out on top with a weighted average of 7.39, it was followed closely by "increased common space cleaning," which had a score of (7.07). Updating F&B policies and procedures also came in a strong third with 6.10.

All of this indicates that hoteliers understand the importance that enhanced sanitation will play in the "new normal" post-COVID. There is a slightly lesser emphasis on increasing digital touchpoints (5.86), and monitoring online reviews (5.66). Hoteliers have an opportunity to reassess their technology strategy and budgets to incorporate contactless technology into their recovery readiness plans. Digital technology such as keyless entry, mobile check-in, and mobile guest messaging encourages social distancing by replacing traditional human-to-human interactions. Similarly, thorough online reputation management allows a hotel to spot gaps in their hygiene policies sooner, thus promoting the health of their property overall.





Q20: Are there any guest-facing technologies you are considering incorporating into your technology strategy post-recovery?



Of the digital technologies which are being considered by hoteliers, mobile/self-service technology and mobile guest messaging top the list, with each being explored by about half of the respondents. Between a quarter and a third of respondents are considering in-room technology, guest experience management tools and mobile keyless entry. Interestingly, a little over a fifth of hoteliers were not considering any technological improvements, while less than a fifth were considering automation, chatbots, or AI. Once again, our responses show the importance of touchless technology such as mobile check-in, keyless entry and mobile guest messaging in promoting hygiene, social distancing, and a contactless guest experience.

KEY TAKEAWAYS

Measuring the Industry Impact:

- *Hoteliers are engaging in broad budgetary cuts (Q5) , which include cuts to marketing, closing unoccupied floors, and staff layoffs/furloughs. In many instances, these layoffs have been quite severe, with about half of hotels planning on reopening with 25-50% fewer staff members, and 11% reopening with less than 25% of their original team (Q15).*
- *41% of respondents believe that their hotels will fully recover in less than a year, with 13% believing that it will happen in the next 6 months. Most hoteliers also believe business will recover at some point, with 58% claiming that they are either “confident” or “very confident” in their businesses’ ability to recover (Q12).*
- *A consumer sentiment survey conducted by Fuel Travel (who has also partnered on this study), shows that in spite of the pervasiveness of the pandemic, respondents are beginning to feel more optimistic about traveling, using more positive phrases such as “ready,” “excited,” “freedom,” and “hopeful.” Respondents were also more likely to travel to local and less densely populated destinations in the first three months after restrictions are lifted*

Mitigating the Crisis and Planning for Recovery:

- *Aside from cost-cutting, hoteliers are adopting a number of strategies to mitigate the crisis and prepare for the eventual recovery.*
- *Almost 75% of respondents are reassessing internal policies and procedures (which include housekeeping and hygiene policies), and three-quarters have attended some type of educational or training program (Q6).*
- *Over 70% of respondents developed some type of business recovery plan (Q13) , with plans ranging from pure cost cutting, to enhancing SOP and hygiene, to revamping their marketing strategy, to a “kitchen-sink” approach of all of the above (Q14).*



Charting a Course in the “New Normal”:

- Over 72% of respondents believe that guest behavior will permanently change post-COVID-19 (Q17), with over 90% believing that guests will be more concerned with hygiene practices and over 74% believing that guests will expect more flexible cancellation policies (Q18).
- In response, 33.4% of respondents claimed they would enhance their SOPs and workflows, while 20.4% claimed they would change their bookings and reservations policies (Q16).
- A major theme of our study has been the necessity of revising and enhancing hygiene and social distancing policies in the post-COVID-19 world. Recently, the World Travel & Tourism Council (WTTC) unveiled a number of new protocols intended to rebuild confidence among consumers once travel restrictions are lifted. Based on scientific evidence presented by the World Health Organization (WHO), Centers for Disease Control (CDC), and various industry organizations, the WTTC created a broad set of guidance focusing on restarting operations, ensuring a secure guest experience, rebuilding customer trust, innovation, and policy implementation. Specific guidelines include:
 - Instructing cleaning teams to focus on high-frequency touchpoints;
 - Utilizing signage and guidelines to encourage social distancing;
 - Retraining staff in infection control, social distancing and enhanced hygiene measures;
 - Removing extraneous items to encourage more efficient cleaning;
 - Investing in contactless technologies;
 - Clear and consistent communication with customers on new health and safety protocols; and
 - Reopening F&B outlets and event spaces to ensure social distancing, proper hygiene, and food safety.

The Role of Technology Post-COVID:

- Over half of our respondents said they plan to incorporate mobile/self service technology post-recovery, while 49% said they would incorporate some form of guest messaging (Q20).
- However, when asked to rank which guest-facing technologies would be most important during post-pandemic, reducing physical interactions between staff and guests, increasing digital guest touchpoints and monitoring online reviews came in at the bottom of the list (Q19). This indicates that more education is needed on the hygienic benefits of contactless technology.
- The WHO is also promoting contactless payments as a way to reduce COVID transmission through physical currency.

OPINION PIECES



Marius Donhauser
Founder & CEO hotelkit GmbH

In the wake of the COVID-19 crisis, guests are now placing even greater emphasis on cleanliness in hotels. The survey indicates that hoteliers therefore primarily focus on the implementation and control of new hygiene standards and cleaning procedures.

Thus preparing for reopening means, reassessing internal policies, amending SOPs and workflows as well as training employees accordingly. Technology can be of tremendous help here. With a hotel operations software like hotelkit the documentation of SOPs can be digitalized and made even more interactive through the use of training videos, for instance. Most importantly, all information is easily accessible to all employees on all their devices. The scheduling of workflows, like increased cleaning intervals, can be automated and transparent documentation ensures that the new guidelines are fulfilled, while always guaranteeing a high quality standard. With the digital checklists of hotelkit the new cleaning standards can be defined, easily implemented and transparently recorded for a wide variety of areas (public areas, F&B area, hotel rooms etc.) Thus, in the event of an outbreak, clear documentation of processes along with high transparency is ensured.

In addition to the fundamental optimization of internal processes, technology can also help to reduce physical contact points and facilitate social distancing in the hotel routine. For example, by using tools that enable contactless check-in or provide the guest with a digital guest directory. Furthermore, tools like these also positively influence the guest experience.

Communication is key, in times of crisis more than ever. For hotels, the most important message to convey to their guests is that they understand and see the measures being taken with regards to cleanliness, hygiene and social distancing. Above all, it is essential to make the guests aware that their health safety is taken seriously and that despite all hygiene measures in place, a comfortable and pleasant stay is ensured.



With hotelkit streamlined processes are just the beginning. The All-in-One Hotel Operations Platform is the ultimate solution for hotels. It enables hotel teams to manage, supervise, delegate and communicate via one comprehensive platform, anywhere, any time, on any device. Originally the software was developed by Marius Donhauser (Founder & CEO) with the intention to improve communication flows in his own 4-star boutique hotel in Salzburg. Meanwhile, the solution for collaboration, service optimization and housekeeping is used by 60,000 hotel employees across more than 1,200 hotels worldwide.



Jaime Sastre
CMO de EISI SOFT

The current paradigm has forced us to accelerate digitization in many areas of our daily lives and the reopening of hotels will not be immune to such digitization. In this sense, the hotels best prepared for the reopening will be those that are capable of transmitting security and confidence with flexible cancellation policies, systems that reduce crowds and maintain the safety distance in common areas, as well as effective hygienic-sanitary protocols.

For this reason, technological solutions focused on online check-in and check-out, biometrics for electronic signatures, reputation management, chatbots for customer communication and digitization of internal tasks and processes gain importance.

Given that customer experience has become one of the main points to stand out from other competitors, in the current scenario it will be fundamental for hotels to adapt to change with flexibility, agility and knowledge to be able to continue offering unique experiences to their customers.

In this sense, we will not only have to personalize the customer experience, but we will also have to contextualize it, that is, offering the trust and safety that they demand of us. To this effect, it will be essential to listen to the customer, interpret and act accordingly to meet their expectations regarding our brand.

There is no doubt, technology will be a fundamental lever to achieve good customer experience, but we must not lose sight of the fact that the new scenario will help accelerate, above all, the digitization strategies that the hotelier had in mind before the COVID era. Therefore, caution should be exercised in the implementation of new post-COVID technologies so as

not to rush into new systems whose effectiveness and needs are still unclear.

To sum up, in this new scenario, in which the client must first be convinced to go to the destination, digital tools that allow us to have the traceability of all the hygienic-sanitary processes carried out in the hotel, such as cleaning, disinfection and control work, gain importance. Then, such traceability will be key to convey safety and trust for both internal and external customers.



EISI SOFT, founded in 2016 in the Balearic Islands, Spain, is a technology company specialized in digitizing the management of operational and regulatory processes. The main pillars of EISI SOFT are consulting services, training and software development, for different sectors. Nowadays, the company operates in more than 18 countries around the world managing more than 600 establishments and more than 96.000 rooms with their software solutions. (<http://www.eisisoft.com/>)

EISI HOTEL unifies, in a single cloud application, the management of all operational and regulatory technical-legal and hygienic-sanitary processes that must be carried out in the different departments of an establishment and / or Hotel chain. The platform Works through different interconnected operations and regulation modules in order to digitize a great number of processes and improve key indicators. All of this is linked to a powerful diagnostic and decision-making management board, with automatic alarms and reports. (<http://www.eisihotel.com/>)



Nicole Dehler
VP of Product for StayNTouch

It's hard to overstate the severity of the COVID-19 pandemic. Coronavirus has overwhelmed public health systems, severely disrupted the global economy, and brought the travel and hospitality industries to a virtual standstill. At this point, it's always important to remind readers that there is a silver lining, and that "this too shall pass." However, whether hotels can harness the necessary fundamentals to thrive in the recovery phase and capitalize on emerging opportunities, will depend entirely on how well they can anticipate and adapt to the "new normal". That is why StayNTouch partnered with ReviewPro and Fuel Travel to survey nearly 500 hoteliers to discover how COVID-19 impacted their business, their customer's concerns and sentiments, and their plans for recovery.

Unsurprisingly, we discovered that an enhanced focus on hygiene and social distancing coming from both hoteliers and guests: Over 90% of our respondents believed that guests will be more concerned with hygiene practices (Q18), while 75% of respondents said they will be reassessing internal policies and procedures (which include social distancing and hygiene policies.)

We also discovered a prominent role for mobile and digital technology in promoting hygiene, social distancing, and a contactless guest experience. Mobile check-in can slow the spread of COVID-19 by removing the front desk as a focal point of physical interactions between staff and

guests, while keyless entry and contactless payments, can remove interactions with common surfaces known to spread germs. Mobile guest messaging can help maintain a warm, personal touch to service, while avoiding unnecessary physical interactions between staff and guests.

About half of our respondents plan to incorporate mobile/self-serve technology post-recovery. Make no mistake, while mobile and contactless tech was once a luxury for forward-thinking and tech-savvy hotels, it is now a critical "must have" in the health-conscious, post-COVID world of travel.

StayNTouch

StayNTouch provides a next generation and fully cloud mobile hotel property management system (PMS), mobile guest check-in solution, and smart kiosk check-in solution that enables hotels to raise service levels, drive revenues, reduce costs, and ultimately captivate their guests.

Backed by a team of professionals with deep roots in the hospitality industry, StayNTouch is a trusted partner to many of the most forward-thinking hotels, resorts, and casinos in the industry: including Yotel, TWA, First Hotels, Conscious Hotels, Valencia Hotels, Modus hotels and MGM Resorts.

<https://www.stayntouch.com/>



Jos Schaap
Founder & CEO of Roomdex

Prior to COVID-19 hotels were just starting to convert their technology stacks to become more digital, mobile and self-service enabled. With the new rules around COVID 19 and social distancing, the digital transformation must be accelerated. Hotels can better provide a secure, clean and safe service by giving their guests choice of service and empowering the guests to interact with the hotel via their mobile phone.

How? By acquiring cloud-based hotel technologies. The Cloud ensure 24/7 software availability, and in times when cash is hard to come by (such as in our current situation), the investment is minimal – most cloud applications only charge a monthly fee.

The core cloud technologies that hotels should focus on are mobile check-in and out, self-service and guest messaging. Guest communications should be moved to a digital messaging platform which will not only deliver a great platform for guest-to-staff communication but also creates peace-of-mind for guests looking for ways to socially distance. In an ideal world, hotels would employ digital room keys. Unfortunately, the accompanying requirement to change door lock hardware makes it infeasible in the current downturn when capital expenditures are being cut. Instead, by employing a digital front desk experience, guests can simply pick up a clean key with minimal face-to-face time.

Recovery will be difficult for every hotel, but those that are quick to deploy a clear way of convincing guests the hotel takes hygiene seriously, and those that deploy cloud-based self-service, mobile, and guest messaging will win the guest review game and come out on top.



ROOMDEX automates, monetizes and ultimately simplifies the hotel room upgrade process by putting the power of choice in the hotel guest's hands.

Automation is the cornerstone of our pioneering hotel optimization platform. ROOMDEX uses hotel reservation, guest data and its proprietary persona and price algorithms to deliver personalized digital offers, greatly enhancing the guest experience. It relieves hoteliers of the labor time required by other upselling solutions while delivering high margin revenue and a substantial ROI. The company has signed its first 15+ clients and is scheduled to launch mid Q4 2020 with ROOMDEX UPGRADE OPTIMIZER.

The company was founded early 2020 by Jos Schaap, Pierre Boettner and Denis Bajet, 3 industry veterans (Ex. MICROS-OPERA (now Oracle Hospitality), StayNTouch, Shiji and Nor1) who together bring over 90 years of hotel software experience and innovation around integrations, PMS, revenue management, BI, mobile, self service and upgrade optimization software. <https://www.roomdex.io>



Casey Munch

Director of Marketing, Americas at Cendyn

Get your marketing ready. Due to the unprecedented nature of the global health crisis, your team will need to have lots of meetings around the right tone and pace for reopening. So, start planning your marketing strategy right away! Build out your budgets, craft your re-opening promotions, draft your campaign creative and construct your channel plan. You'll want to get these approved far in advance of reopening.

Communicate about safety protocols to the guest experience. Keep guests updated as recovery begins with the safety protocols you've put in place to re-open. The more transparent you can be about these changes, the better the overall experience will be for each guest. Remember, the guest experience is about the whole customer journey, and now, more than ever as an industry, we need to keep guest anxieties to a minimum. Communicate about important changes, such as room cleaning schedules, check in process changes and restaurant seating changes.

Monitor demand data. Create daily demand reports in your revenue management system to share widely. These should include demand data at both the property and market level, as well as relevant data, such as passenger traffic, booking windows, comp set pricing intelligence and other travel trends. During reopening and ramp-up, this report is the "single view of the truth" to support cohesive and unified strategy.

Use technology to reduce contact. The human

side of hospitality will always be what makes people travel, and that will never change. We are, however, faced with the need to reduce contact and keep a safe distance. This might feel like it will impact the guest experience, and it will, to some extent, but leveraging technology and automation through a hotel CRM will ensure the effect is minimal. Automation and other technology enabling contactless transactions will also have a hugely positive impact in restoring someone's faith to stay safe and healthy at your hotel after a crisis.



Cendyn is the leading innovative cloud software and services provider for the hospitality industry. With a focus on integrated hotel CRM, hotel sales, and revenue strategy technology platforms, Cendyn drives sales, marketing and revenue performance for tens of thousands of hotels across the globe. The Cendyn Hospitality Cloud offers a complete set of software services for the industry, aligning marketing, sales and revenue teams to optimize their strategies and drive performance and loyalty across their business units. With offices in Boca Raton, Atlanta, Boston, Las Vegas, San Diego, London, Dubai, Munich, Singapore, Sydney, Bangkok and Tokyo, Cendyn proudly serves clients in 143 countries, delivering over 1.5 billion data-driven, personalized communications on behalf of their customers every year.

More info on Cendyn and crisis-management/recovery resources for hoteliers: <https://bit.ly/2ZWJp6G>



Michael Kessler
CEO, ReviewPro

This global study highlights just how much the COVID-19 crisis has touched all areas of hoteliers' business. With the sharp and unprecedented decline in guests, hoteliers have experienced extreme losses resulting in cost saving strategies and budget cuts across the board. This has put hotel owners and managers into the position of having to reconsider every part of the business - from budget allocations, to pricing strategies, staffing, and future investments.

According to the results of this study, we can see that even in this difficult situation, hoteliers are hopeful for recovery, although they feel it will be a long road. They are conscious that guests' needs will have altered when recovery happens and are now preparing to meet new guest expectations for increased hygiene, flexible cancellation, familiarity, and social distancing. What is considered a great guest experience will have changed - moving from a traditionally 'high-touch' environment, to a 'low-touch' environment.

To meet post-pandemic travelers' expectations, hoteliers are actively seeking out new technologies - namely contactless, mobile-first solutions, and guest messaging. With the implementation of solutions that can be entirely controlled from their own devices, guests will be able to enjoy an end-to-end experience where they have access to maximum communication with minimum physical touch. Hoteliers on the other hand, will be able to

digitally accompany guests at all stages of the guest journey - from exploration, to booking, check-in, during the stay and post-stay - and provide the continuous stream of information, reassurance, and assistance that guests need.

As doors begin to reopen and the industry looks towards recovery, it is a global opportunity for a reassessment. Hoteliers now have a genuine imperative to rethink their technology strategy in a way that was not there before in order to help them to navigate the new reality, and continue to create great guest experiences.



ReviewPro is the world leader of Guest Intelligence solutions, with more than 60,000 hotels in 150 countries. ReviewPro's Global Review Index™ (GRI), the industry-standard online reputation score, is based on review data collected from 175+ OTAs and review sites in 45+ languages. The company's cloud-based Guest Experience Improvement Suite includes Online Reputation Management, Guest Satisfaction Surveys, and Auto Case Management. ReviewPro also provides an AI-driven innovative Guest Experience Automation™ product to automate guest experience management for hotels. These tools and processes enable clients to prioritize operational and service improvements to deliver better guest experiences and increase guest satisfaction, online rankings, and revenue. (www.reviewpro.com)



Carson Foerster
Director of Sales, PMS/POS Systems

What are some things hoteliers can do now to better prepare for recovery?

Hoteliers may consider reevaluating their selling strategies to account for post-COVID regulations such as building in stay buffers on either side of reservations to ensure the safety of both guests and housekeeping staff. At Springer-Miller, we are working on automating these processes so that it is easy to manage for hoteliers and gives a clearer picture of sellable inventory. This is also a time to consider flexible cancellation policies to build confidence in guests looking to book during these uncertain times.

How will the guest experience be impacted post-recovery?

We are working closely with our customer base to be able to provide options so they can offer flexibility to their guests. While many guests may still prefer a traditional check-in experience, we are confident to see a rising demand in remote and contactless check-in options. Springer-Miller Systems has had long-time partnerships with Kiosk, Mobile and Tablet solutions and we are working to enhance those integrations to communicate more data between our respective solutions. Springer-Miller's WorldNXT Mobile solution enables guests to download a branded application and complete a remote check-in before arriving on property. Guests can then bypass the Front Desk and use the mobile key functionality on the same app to access their room.

Will hoteliers need to reassess their technology strategy? How so?

Technology adaptation beyond the check-in experience will be a must. POS technology found in Food & Beverage and Retail Outlets will adapt as well by expanding contactless payment offerings, mobile ordering, and curbside pick-up options. Springer-Miller's 2020 POS roadmap includes many of these enhancements.



Since it was founded in 1984 in Stowe, Vermont, Springer-Miller Systems has been an innovator of technology systems for the world's most exclusive hotels, resorts and spas. The SMS|Host® Property Management System offers a complete set of fully-integrated modules enabling complex resorts to provide highly personalized guest service from front office to food & beverage to spa to the golf course and more. Springer-Miller's SpaSoft® provides a dynamic spa and activities management solution used in more than 70% of the world's Forbes Five Star Spas.

www.SpringerMiller.com



Biran Patel
AAHOA Vice Chair

What are some things hoteliers can do now to better prepare for recovery?

The most important thing hoteliers can do to prepare for recovery is to get their financial ducks in a row. Most hotel owners believe it will be at least a year before occupancy and RevPAR return to normal. Good financial planning, understanding what one's liquidity will be for the duration of a prolonged recovery is imperative. Factor in the end of government assistance such as PPP and EIDL. Work with lenders. Determine how to bring back employees.

Before we see occupancy increase, people need to have a positive mindset about traveling again. Being transparent about efforts to ensure the safety of employees and guests will help put minds more at ease. Having effective protocols in place and publicizing them through brand marketing as well as the individual hotel websites and social media can help persuade guests to return.

How will the guest experience be impacted post-recovery?

Hotel owners are going to do what they must to keep guests and employees safe. If that means that hotels hit the pause button on certain amenities, guests and owners will have to adapt. Owners, brands, and associations like AAHOA need to maintain constant communication to evolve and make the right changes to fulfill owners' and guests' needs.

Will hoteliers need to reassess their technol-

ogy strategy? How so?

Definitely. Technology will continue to evolve to help hotels meet health and safety standards, to meet guest expectations, and to keep up with industry trends. There are many technologies that can help mitigate COVID-19 transmission by eliminating or reducing interactions or contact. Mobile check-in and keyless room entry are two that come to mind, although not all hotels may be able to implement the latter immediately. Perhaps most significantly, the industry must address if and how guest data is collected, shared, and used to combat virus transmission. Guests have an expectation of privacy, and we need to establish how that can be reconciled with ensuring the well-being of other guests and our employees.



[AAHOA](#) is the largest hotel owners association in the nation. The 19,500+ AAHOA Members own almost one in every two hotels in the United States. With billions of dollars in property assets and hundreds of thousands of employees, AAHOA Members are core economic contributors in virtually every community. AAHOA is a proud defender of free enterprise and the foremost current-day example of realizing the American Dream.

AAHOA's mission is to advance and protect the business interests of hotel owners through advocacy, industry leadership, professional development, member benefits, and community engagement



Dean Schmit
Director, Strategic Accounts

What are some things hoteliers can do now to better prepare for recovery?

First and foremost, use the downtime. Do those renovations you have been putting off. Train & Cross-train yourself and your staff. Review your tech platforms and consider setting up new ones. Dabble in digital – it's very cheap right now with minimal risk.

Mine your guest feedback data and prominently feature every single comment that talks about the cleanliness of the hotel.

Think about how you're going to generate demand. A few examples:

- Local Travel – Parents' Night Out. Local businesses, restaurants & attractions will be in the same boat as you, and hungry for any partnerships they can get. Use them!
- Business Travel – Remind people how much we missed meetings with real people.
- Leisure Travel – Remind people they can finally plan that vacation they were dreaming of.
- Destination travel – Create events.

How will the guest experience be impacted post-recovery?

While Hospitality is all about being hospitable, we

will also be striving to minimize the need for contacts and interactions with other humans. That is a very sad thing to say, but it is true. Technology will play a key role in this recovery.

Will hoteliers need to reassess their technology strategy? How so?

Yes, absolutely. The changing needs of the guest experience will be largely facilitated by technology. Things that were once luxuries, such as mobile check ins and keyless entry, will need to become the norms.

I predict an increase in online traffic largely due to a shift away from walk-in traffic. People won't be willing to "just show up" but rather will want to do a bit more research and plan ahead. A hotel's guest feedback content will be an integral part of this.

Finally, while direct bookings have long been a preferred channel, they will become more important than ever. Hotel's will want/need the ability to control their narrative with future guests. Events can cause the need to cancel/rebook guests, and this is something the hotel should own themselves rather than relying upon a 3rd party OTA to handle. Digital marketing programs such as metasearch and re-marketing should be ready to launch now.



[DerbySoft](#) enables travel companies to work together through technology and innovation by providing high-performance distribution services to suppliers, distributors, metasearch engines and more to conduct digital commerce efficiently and effectively.

DerbySoft is a global technology company that has connected Suppliers with Distributors since 2002 and currently offers a variety of solutions for the hospitality and travel industries.



Wade Tibke
VP Marketing, Navis

Now more than ever, hoteliers need to book every bit of demand coming their way. Capturing every potential guest requires they optimize each direct channel. They'll need to deploy strategies that collect abandoned booking engine leads, follow-up on reservation inquiries, and employ automated trigger & lifecycle emails. Grab dreamers attention while you can, and book them if possible. Get started by adding everyone – especially your drive market – to personalized email nurture campaigns and inspire a future visit.

While most hotels are opening with fewer staff, they still need to provide adequate call coverage. Right now people want to talk to someone and get assurances around safety, driving amenities (like parking), and new property policies.

Your agents are the first experience guests will have during their journey. That initial interaction paints a picture of what they can expect during the stay. Focus on team training and prepare agents to handle questions surrounding new cleaning protocols and which amenities they can expect on site (i.e. whether the pool and restaurant are open). Give them the confidence to answer these questions and encourage travel.

Rehiring too quickly, especially with unpredictable demand, can be risky. But missing large portions of reservation inquiries is even riskier. It's possible to reduce your exposure and maintain quality

guest experiences by utilizing highly-trained, outsourced reservation teams. They can cover today's call traffic, and then - when the time is right - transition volume back to your restaffed internal teams.

With fewer staff and guests, now might be a good time to assess your technology strategy. With leaner times ahead, some good questions to ask yourself might be:

How am I collecting non-booked guest data – from voice & web channels – and turning that into revenue?

Are my technology subscriptions priced in such a way that make sense for the volatility of my business?

Have I built a revenue tech stack that is integrated to capitalize on massive operational efficiencies, gain timely visibility into my business, and - most importantly - provide seamless guest experiences?



For hospitality professionals, getting and keeping profitable guests is tougher than ever. NAVIS is the leading Hospitality CRM with proven solutions that helps Reservations, Revenue Management, and Marketing truly operate as one team, and make more money. For more information, visit: naviscrm.com.



Stuart Butler
COO, Fuel

guest will continue to follow the path of least resistance, they will always tell their friends and family about their experience, and that success will always be predicated on how you make the guest feel - not just during their stay, but throughout the entire travel journey. Ensure that you get the fundamentals of hospitality right and you will come back faster and stronger than your competition.



Since 1993, Fuel has provided innovative data-driven software and marketing solutions to the hospitality industry. Our mobile-friendly booking engine, AI-powered CRM and contactless Check-In app solutions, along with our specialized digital marketing solutions, help independent hotels increase direct bookings, RevPar and GoPar.

While the situation brought on by the coronavirus pandemic was not something any of us could have foreseen, it has been really interesting watching the range of responses from hotels. Some properties moved extremely rapidly and cut back on everything while others took a wait and see approach. Some thought only about the decisions necessary for short term survival while others looked for long-term opportunities to gain market share. There wasn't a playbook to follow and many in the industry were left to figure it out as they went along. Regardless of where you fell in your response, we are now facing the prospect of recovery and there's no playbook to follow for that either.

We are entering an uncharted frontier of hotel marketing. The tactics we implemented in 2019 will not translate because the consumer has fundamentally changed and the sources of demand we once knew have completely evolved. We will need to become more agile, more thoughtful, and more open to new ideas. We must all become predators and go hunting for our guests in a much more aggressive manner than we are used to. We will face stiffer competition and we must rise above the fray and find a way to stand out by offering clear value and reassurance.

One of the best ways to develop your new strategy is to focus on the things you know to be true and that will remain unchanged. We know that

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