

HOSPITALITY POST-COVID-19

Implications and Solutions for the Hotel Industry

Authors: Mike Bellmont, Neil Ellefsen

June 23, 2020

© 2020 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.





OVERVIEW

THE COVID-19 PANDEMIC IS HAVING A MAJOR AND IMMEDIATE IMPACT ON PERSONAL AND BUSINESS TRAVEL, EVEN BEYOND “STAY AT HOME” REGULATIONS.

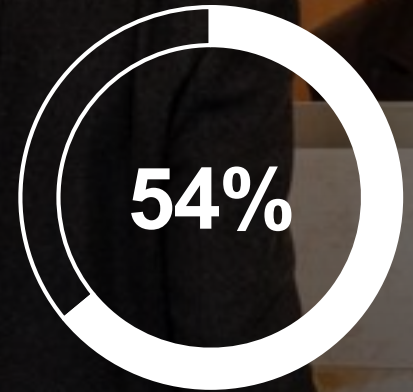
The travel industry has been halted by the pandemic. Health safety is creating a massive and dramatic shift for nearly all industries, and one thing is clear -- the current reality will have a **lasting impact**.

Ipsos is committed to helping you adapt and act decisively. We can help you understand your customers in the current context.

We offer agile tools which enable quick answers to business issues surfacing during this turbulent time.

What should hotels do now to best position their services?

Where should hotel providers focus their attention and communications to meet new consumer needs and expectations?



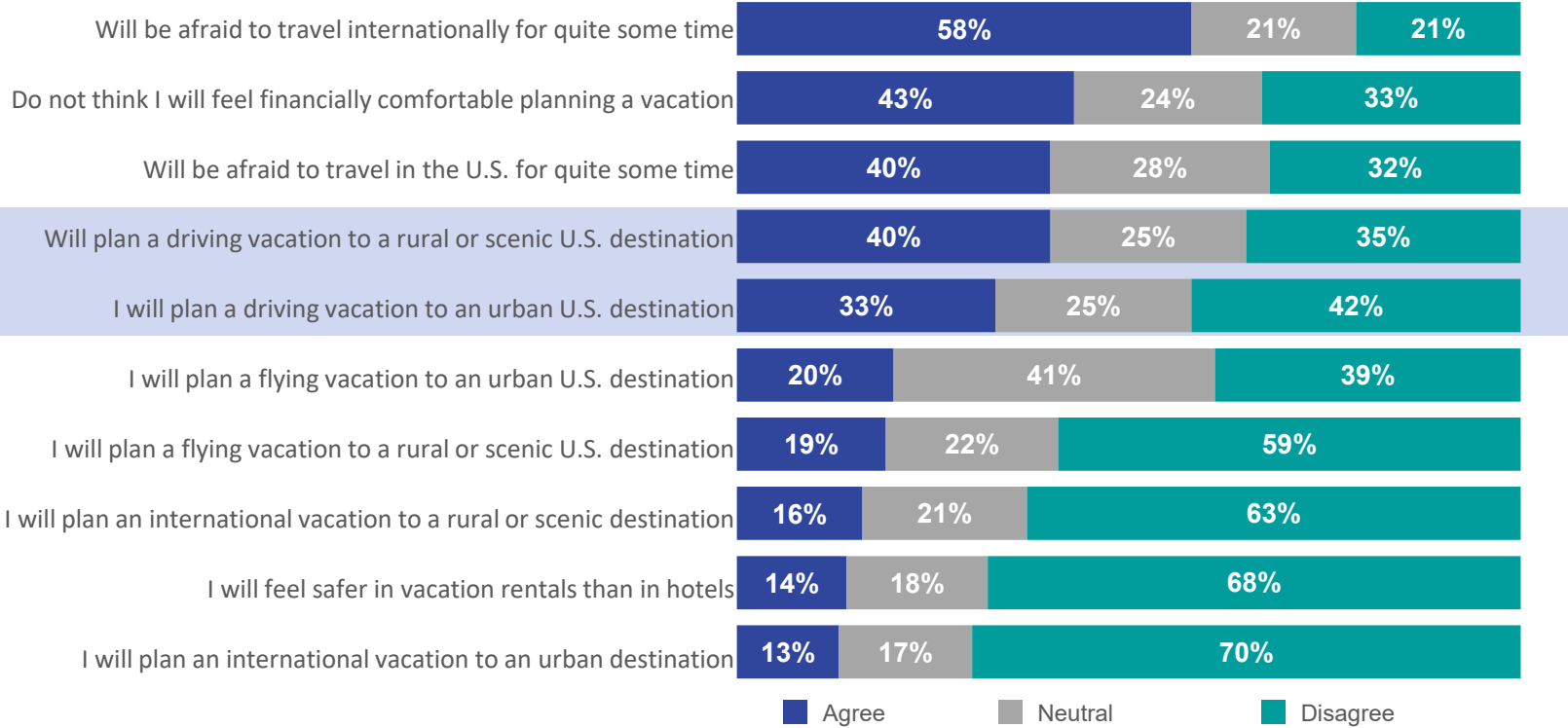
..of US Adults say they will go back to doing all the things they usually do, including vacations and travel.

Source: Ipsos Internal US Covid-19 Tracker – April 23, 2020



Though there is some trepidation to resume traveling as the ban lifts, about one-third are open to a driving vacation.

Thinking of the day when the government lifts stay at home bans for your area, to what extent do you agree or disagree with the following statements...



Source: Ipsos Internal US Covid-19 Tracker – May 28-29, 2020
Percentages based to total US population



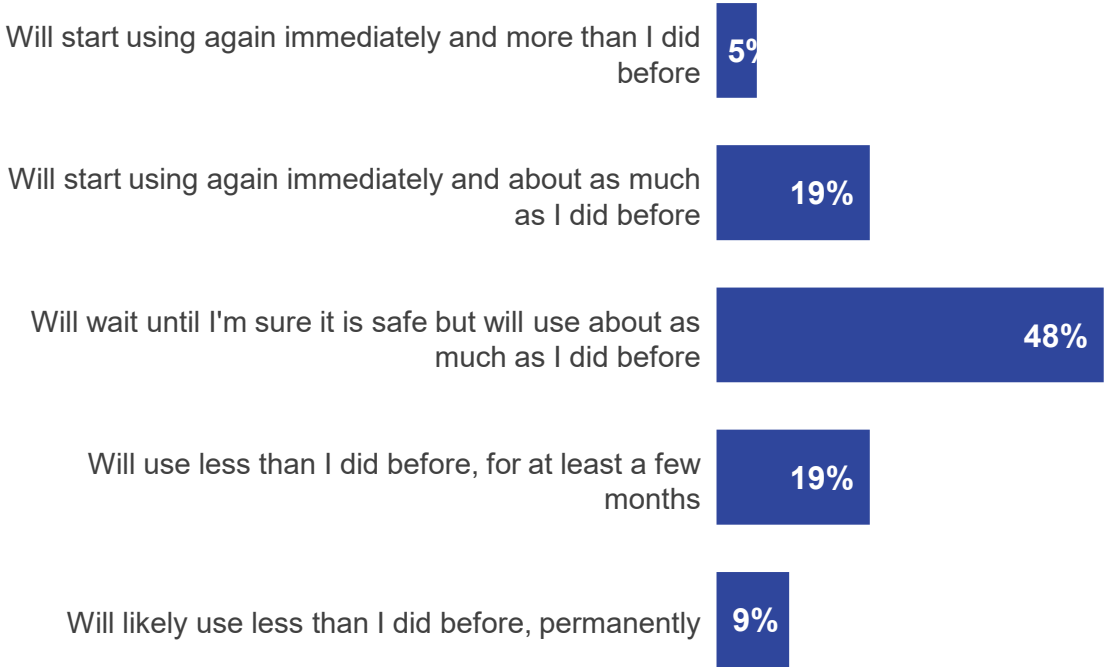
Understandably, consumer needs have shifted to health and safety...

What matters more to you now than before the Coronavirus crisis began?



But they expect to continue using hotels once safety is assured.

Thinking about when COVID-19-related closures and restrictions end, how will you proceed in using Hotels?



Source: Ipsos Internal US Covid-19 Tracker – April 17-20, 2020



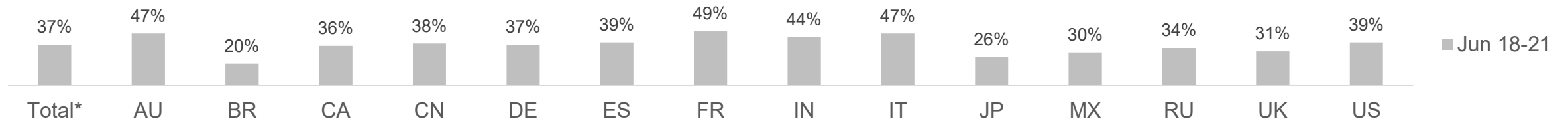
Countries are emerging from the crisis at different stages and require customized solutions.



Link to Article:
[Summer Travel Plans Despite....](#)

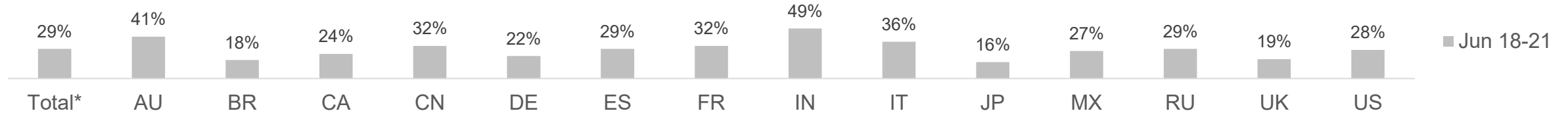
How comfortable would you be staying in a hotel in your country at some point in 2020?

% Comfortable (Top 2 Box)



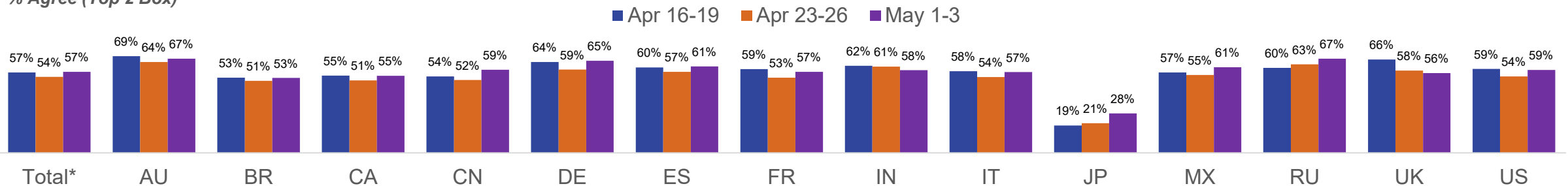
How comfortable would you be traveling by air within your country at some point in 2020?

% Comfortable (Top 2 Box)



Agree/Disagree: I will go back to doing all of the things I did before, including vacations and travel

% Agree (Top 2 Box)



Unweighted base: Total Market - Excl VN: 27767, AU: 2000, BR: 2000, CA: 2000, CN: 1775, DE: 1994, ES: 2000, FR: 2000, IN: 2000, IT: 2000, JP: 2000, MX: 1999, RU: 1999, UK: 2000, US: 2000

© Ipsos

No filter applied



Our view on research during times of crisis: when you reach a fork in the road, take it

Build for the future...

Understand how countries are managing the crisis, and their progress towards recovery, so you can anticipate their return to “normal.”



...with an eye toward emerging trends

Track how consumers' attitudes and behaviors are changing during the crisis to understand what new opportunities will open in a post-COVID-19 market.



...by uncovering insights today

Monitor consumer sentiment to reveal communication and messaging strategies that allow you to stay in step with consumers – during and following the crisis.



How are countries managing the crisis, and how can brands anticipate their return to “normal”?

UNDERSTANDING EVOLVING BEHAVIORS IN LIGHT OF WHERE CONSUMERS ARE IN THE COVID-19 FUNNEL

You Should: Gather robust quantitative data to anticipate future consumer needs via...

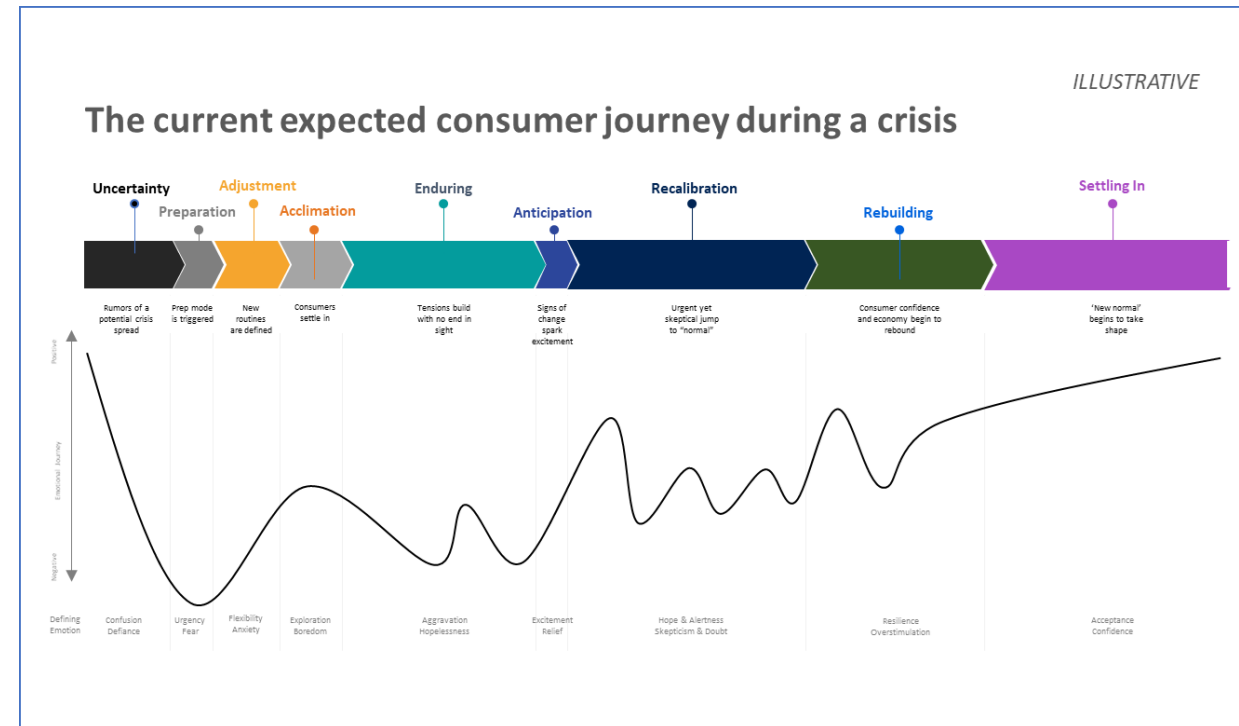
• Ipsos Essentials Tracking

- Ongoing public perception and behavioral response in 12 global markets, trending back to 2/7/20:
 - Behaviors: What have you done differently? What will you sustain?
 - Emotions: How are you feeling today?
 - Management of the crisis and priorities
 - Short-term and long-term expectations
 - Personal and macro financial impact
 - Purchase and e-commerce behaviour at the category level

Opportunity to include custom questions

 [Link to Article: A Role for Brands to Serve](#)

ESSENTIALS uses a dynamic COVID-19 phase framework to see where countries are in dealing with the crisis and what is likely to happen



How are consumers' attitudes and behaviors changing in a post COVID-19 market?

TRACKING & UNDERSTANDING EVOLVING BEHAVIORS

You Should: Gather robust quantitative data to understand new and evolving behaviors via...

- **Brand Capsule Customized Tracking**

- Weekly, customized monitoring of consumer response and behavior during the Coronavirus pandemic and recovery.
- Syndicated weekly tracker monitoring **global** response across 12 countries to the Coronavirus pandemic and recovery.
- Fit-for-purpose Social Intelligence (social media monitoring)
- Ipsos Behavioral Science experts guide customized questions to better understand habits and behavioral change (*optional add-on*)



Link to Article:
[Brand Rituals in a Low Touch World](#)

An integrated approach that blends multiple perspectives on the impact of COVID-19



Start with a Customized Omnibus Survey

Monitor reactions and behavior specific to your categories and brands, with ~6 custom questions, in one or more countries.



Incorporate Fit-for-purpose Social Intelligence

Achieve a different layer of insight through social media monitoring of discussions concerning your categories and brands, made in conjunction with Coronavirus/COVID-19. Daily email summary of results and weekly reports are provided to monitor shifting trends.



And then Overlay a Syndicated Tracking Study

Overlay insights from a syndicated weekly tracker of 1000 general population adults*. Topics include daily behaviors (e.g. transit, gatherings), overall purchasing (grocery, e-com, etc.), perceptions of gov't and WHO responses, and personal actions being taken.

*Data available from 12 different countries



We will Integrate & Synthesize the Results

The insights come to life on a weekly basis when we combine all three outputs in a succinct and digestible snapshot (see next page for deliverable example)

What do **consumers** expect from brands? **How** should messaging and **communication strategies** change during and following the crisis?

You Should: Identify brand platforms that combine consumer preference & your brand's right to play via...

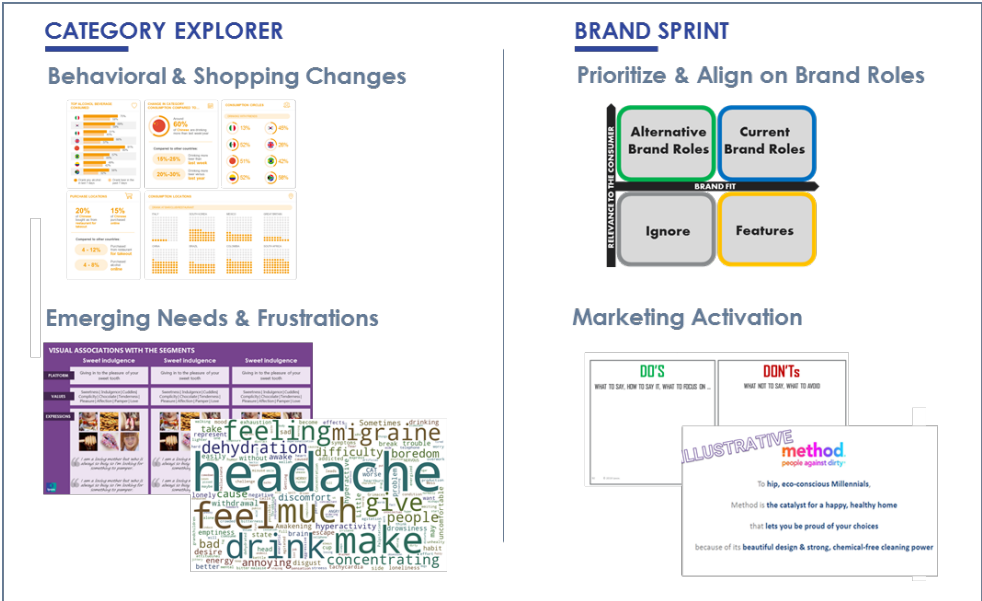
You Should: Identify brand platforms that combine consumer preference & your brand's right to play via...

- **Brand Compass**

Quantitative tool designed to provide quick insights into what's changing, identify what changes are here to stay, and how your brand can connect with consumers to address their emerging needs and frustrations:

- Category Explorer: Understand the new environment focusing on category impact and changes
- Brand Sprint: Prioritize what your brand can do, and stand for in the current environment

Link to Article:
Staying Close to your Customers



Brand Compass is designed to move fast. Each module can be executed in less than 3 weeks from approval to report and virtual workshop

Note: While there are two modules, the Category Explorer is the foundational element. The Brand Sprint is a suggested option to help turn insight into specific brand actions.

THANK YOU.

MIKE BELLMONT

Mike.Bellmont@ipsos.com
+1 612 702 9460

NEIL ELLEFSEN

Neil.Ellefsen@ipsos.com
+1 973 333 7069

