



ACCOR

ACCOR TRAVEL REPORT:

*The future of travel in
2021 and beyond
– from resilience to recovery*

A GLIMPSE INTO THE MINDSET AND
INTENTIONS OF TRAVELERS

In an ever-changing environment, how can the hospitality industry transform, adapt and build for the future of travel? A deep understanding of motivations and behaviors is crucial to predicting how consumers and corporations will view lifestyle pursuits and experiences in the years to come.



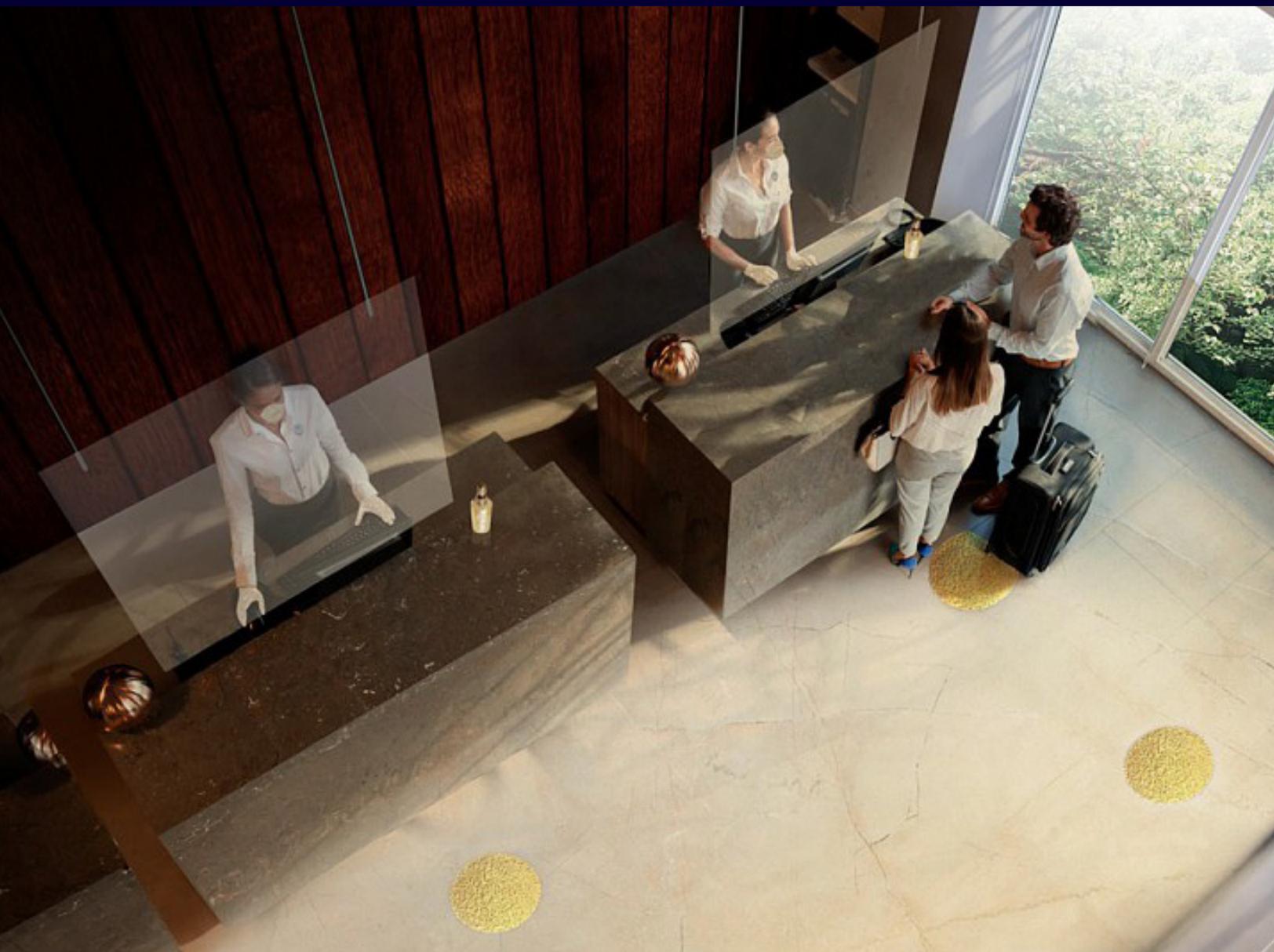
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In this first edition of the Accor Travel Report series, we will reflect on insights from consumer research studies conducted to shed light on themes and near-term trends that have emerged since the onset of the COVID-19 pandemic. The research was conducted by Accor's Consumer & Market Insight team, exploring the attitudes and behaviors of leisure and business travelers globally, as well as those of meeting and event (M&E) professionals. The findings reveal a candid glimpse into consumer mindsets at the end of one of the industry's most challenging years in modern history.

Safety First

HYGIENE TOP PRIORITY FOR GLOBAL TRAVELERS

Safe travel is here to stay, and the industry must take note. In fact, the majority (88 percent) of Accor guests say they would choose a hotel over options within the sharing economy. For travelers more broadly, hygiene, physical distancing and hotel policies play the largest role in choosing where to stay with strict sanitation and safety standards (77 percent), having no change fees (69 percent) and having no cancellation fees (68 percent) taking the top spots.





While it is paramount that hotels rethink and address the realities of travel post-COVID-19, it is also a time to address and bring to the forefront the digital transformation that was underway before the pandemic – from contactless check in/out to the personalization of the hotel experience. Although promising vaccines have emerged, recovery timelines continue to be debated, meaning the industry needs to reconsider and fast-track these new models to transition from the initial impact of COVID-19 to a more resilient future.

Early in the pandemic, Accor launched the ALLSAFE label to give guests the assurance of a third-party verified standard of hotel cleanliness and hygienic requirements. To-date, more than 95 percent of Accor's worldwide network is utilizing ALLSAFE protocols, which include a reinforced cleaning program with frequent disinfection of all high touch areas, such as elevators and public restrooms, and deep cleaning of guestrooms with

hospital-grade cleaning products and materials, including upholstery, carpets and bedding cleaning at high temperatures. To achieve ALLSAFE certification, hotels must comply with a detailed list of 16 global commitments jointly developed with Bureau Veritas, which translates into more than 100 standards in total. Accor's ALLSAFE Label & Cleanliness Index shows a higher level of guest satisfaction (+3 points) in ALLSAFE certified hotels.

Leisure, Lifestyle and Local

TRAVELERS ARE READY TO EXPLORE

One of the most compelling data points of Accor's research shows that heading to a hotel for a getaway ranks as one of the top three activities Accor customers feel ready to do. Three-quarters of Accor guests say they would feel comfortable staying in a hotel, compared to less than 55 percent who are ready to use public transit.



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“It’s time to adjust and rebuild for the future in ways that continue to take traveler safety into account, but also reflect the lifestyles and experiences business and leisure guests are accustomed to. Over the past year, people around the world put their travel aspirations on hold. It is clear from our consumer research that the desire to travel is as deeply rooted and strong as ever.”

- Francois Dung
Senior Vice President, Consumer & Market Insight, Accor

Leisure, Lifestyle and Local

“Once the pandemic is under control and restrictions on international travel begin to ease, we certainly expect to see a resurgence of bookings and the return to the days of global discovery, and we’ll be ready to welcome our guests”

- Francois Dung,
Senior Vice President, Consumer &
Market Insight, Accor

JO&JOE HOSSEGOR HOTEL

Currently, local getaways and staycations are meeting the need, as people take opportunities to explore their region, discover the undiscovered in their communities and visit destinations closer to home. But destination priorities may shift in the future. At the time of the study, almost two-thirds (68 percent) of Accor guests said they would travel for leisure over the coming months, prioritizing natural (mountains, forests, national parks, etc.) and seaside destinations (46 and 43 percent).

Coming Together

RETHINKING MEETING AND EVENTS

For M&E professionals, what was important in the past has shifted – flexibility and safety are now the most important factors. Events will be shorter, local, and smaller. More than half (58 percent) of M&E professionals surveyed by Accor believe large meetings (>150 attendees) will be reduced, but only 25 percent say the same for small events and gatherings (<30 attendees).

Going forward, international and regional events are expected to be twice as affected than those locally. Training and education sessions are expected to be the least impacted meeting type, with almost 50 percent of respondents saying they would happen as often or more often than usual.

In many cases physical meetings will transition to virtual and hybrid meetings, with 70 percent of M&E professionals considering this option, and 50 percent of in-person meetings expected to transition to virtual meetings in 2021. Accor has already begun to broaden its approach to meetings, including new hybrid solutions.

When it comes to personal occasions and special events, many Accor hotels have reimagined their ballrooms and other unique venues to host small wedding ceremonies that adhere to local gathering limits, and a number of Accor hotels have expanded their off-site catering services and/or introduced curbside pickup meal-kits to bring the culinary experience home.





SO/ VIENNA

A recent partnership between Accor, GCB Convention Bureau, Fraunhofer-Institut IAO, C4 Berlin and the visitBerlin Berlin Convention Office sparked BOCOM – Experience Borderless Communication, the first borderless communication experience worldwide. A central conference venue in Berlin was paired with hubs in Amsterdam, Essen and SO/ Vienna, while global attendees joined virtually to discuss the future of work and communication.

Coming Together

For amateur cooks craving the help of an award-winning culinary team, Fairmont Singapore started offering curbside pick-up of gourmet meal kits, including all the ingredients to re-create the Fairmont culinary experience at home. At Fairmont The Queen Elizabeth, the hotel's Re Le Traiteur offering allows Montréal society to bring the elegance and culinary expertise of Fairmont into their own space under the guidance of Chef Edgar Trudeau-Ferrin.

Coming Together



SOFITEL PHILADELPHIA AT RITTENHOUSE SQUARE HOTEL

With a little creativity, a touch of elegance and one's closest friends and family in tow, meaningful events can still be created through smaller gatherings. Several Accor hotels, including Sofitel Los Angeles at Beverly Hills and Fairmont Jaipur, are offering unforgettable "micro" wedding ceremonies in picturesque settings. From presidential suites and lavish ballrooms, to helicopter rides and three-course meals, small and socially distanced can also mean spectacular.

“At Accor, we immediately began looking at how we could create experiences for our guests to celebrate important life moments, big and small. We’ve redesigned the hotel wedding experience for more intimate affairs, spearheaded hybrid events and reimaged our physical spaces to accommodate leisure and business guests as we look beyond work from home, to work from anywhere.”

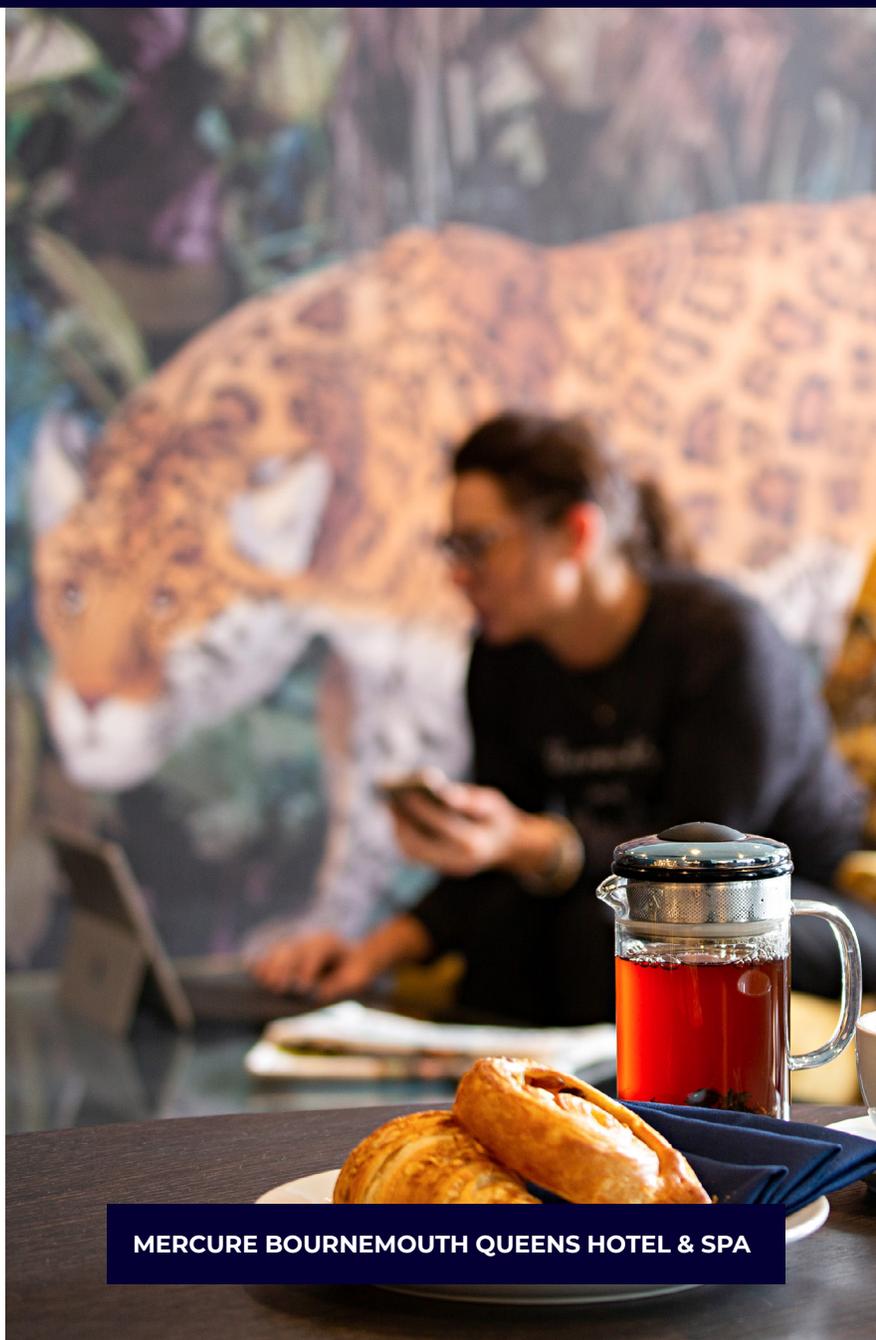
- Patrick Mendes,
Chief Commercial Officer, Accor

Stay Close

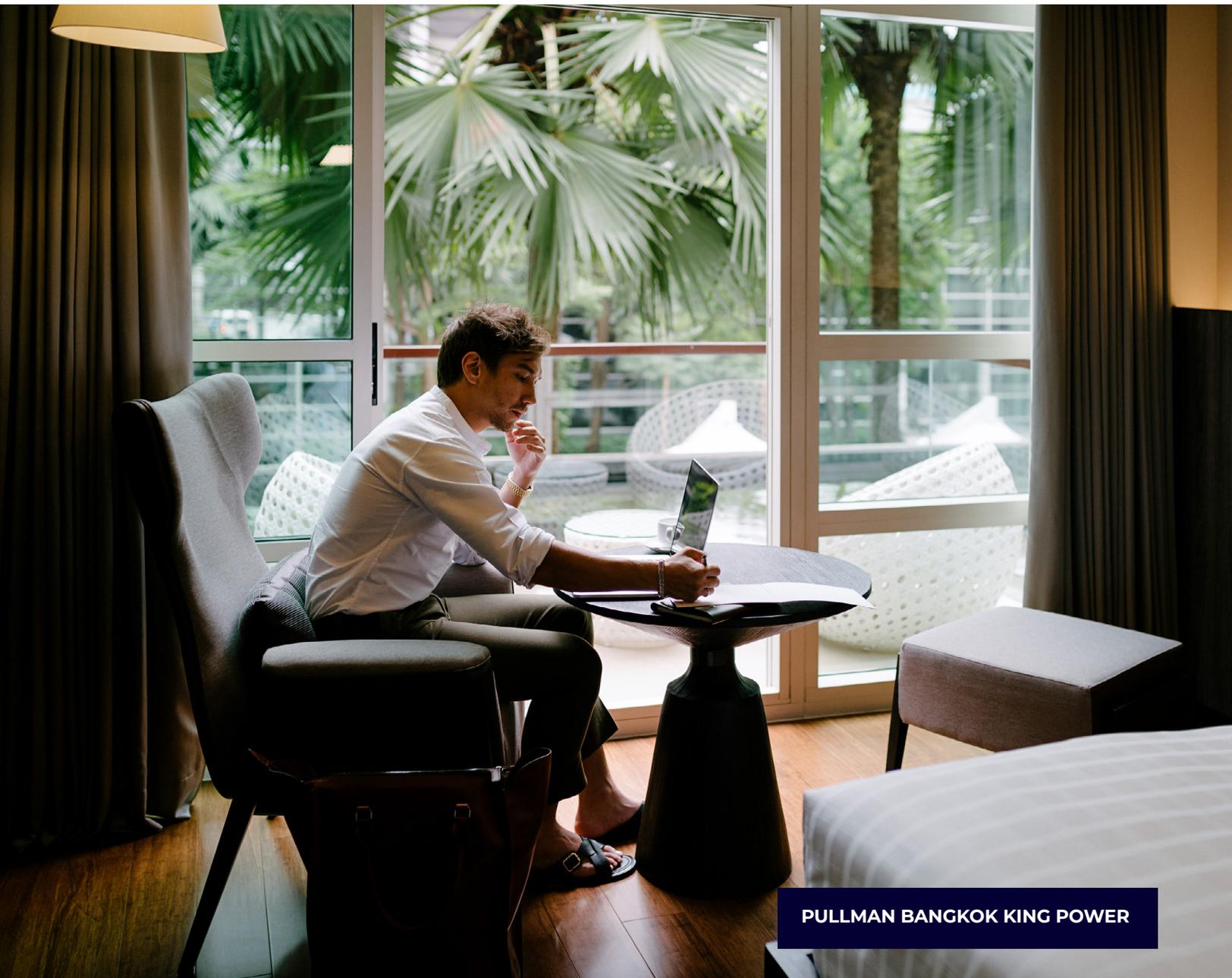
WORK FROM HOME GETS A BOOST

More than half of business travelers – 53 percent – think that they will travel less frequently than before the COVID-19 outbreak. Meanwhile, millions of people are feeling the effects of working from home, including decreased work-life balance, impacts on productivity and the physical and mental health impacts of personal space becoming office space.

For those looking to fulfill the need for space, or the desire to travel and work from anywhere, many Accor properties have launched home office concepts that allow people to book a hotel room for the day, providing an uninterrupted, premium remote working experience. Day guests can enjoy all the in-room amenities and comforts, including room service, as well as the hotel's public spaces, bars, and restaurants. Spaces are stringently cleaned and sanitized in accordance with ALLSAFE protocols and safeguards.



MERCURE BOURNEMOUTH QUEENS HOTEL & SPA



Ten Accor hotels in Bangkok – including Pullman Bangkok King Power, Grand Mercure Asoke Residence and Vie Hotel Bangkok – MGallery – are now offering day-use packages for guests who need a private office space for the day, while across India, for example, ibis hotels are now offering co-working spaces under the Work@ibis label. Guests booking the service can reserve their “office” for the day while enjoying all the in-room amenities and comforts, including customized F&B offerings. A key player in the “workspitality” segment, Accor also offers convenient access to high-end and budget-friendly workspaces through Wojo, a pioneering co-working brand that includes a diverse network of private offices, shared workspaces and meeting rooms.

“There is no question that 2020 has been one of the most challenging years in modern history, not only for the travel industry, but for everyone the world over. Fortunately, we have all adapted to the current situation and it is through this collective resilience that we feel cautiously optimistic about some level of recovery in 2021. We have all been through transformative shifts this year, and we’re ready for things to move in a positive direction as soon as possible.”

- Patrick Mendes,
Chief Commercial Officer, Accor



ALLSAFE WITH IBIS



About the Accor Travel Report

SURVEY METHODOLOGY

In June and July 2020, Accor's Consumer & Market Insight team conducted three unique surveys to understand post-COVID-19 travel. The first, conducted in June, was of 7,460 Accor customers from 10 countries. This consumer guest survey looked at the attitudes towards travel from frequent and knowledgeable travelers. In June and July, 893 interviews were conducted with Accor's B2B clients, including corporate buyers, heads of purchasing and travel managers. This corporate client survey identified the impact of COVID-19 on client spending on corporate travel and hotels and looked to anticipate 2021 travel trends. In July, 1,770 interviews were conducted with M&E planners from five regions to gauge the recovery of the M&E industry in the coming months and meeting types they expect to see needed in 2021.