



La gestion du COVID-19 au sein du groupe ACCOR



Eric Dadian

Président - AFRC



Ian Di Tullio

Global Senior Vice President Guest
ACCOR

Jeudi 14 mai 2020 - 11h00 à 11h45

Managing & Transforming in the midst of Covid-

19

La gestion du COVID-19 au sein du groupe Accor

@lanDiTullio



Our organisation



Digital
Acquisition

Customer
Marketing

Contact & Care

Loyalty

Partnerships

Guest





AGENDA

1

IMPACT

2



ACTIONS

3



WHAT IS THE FUTURE HOLDS

4

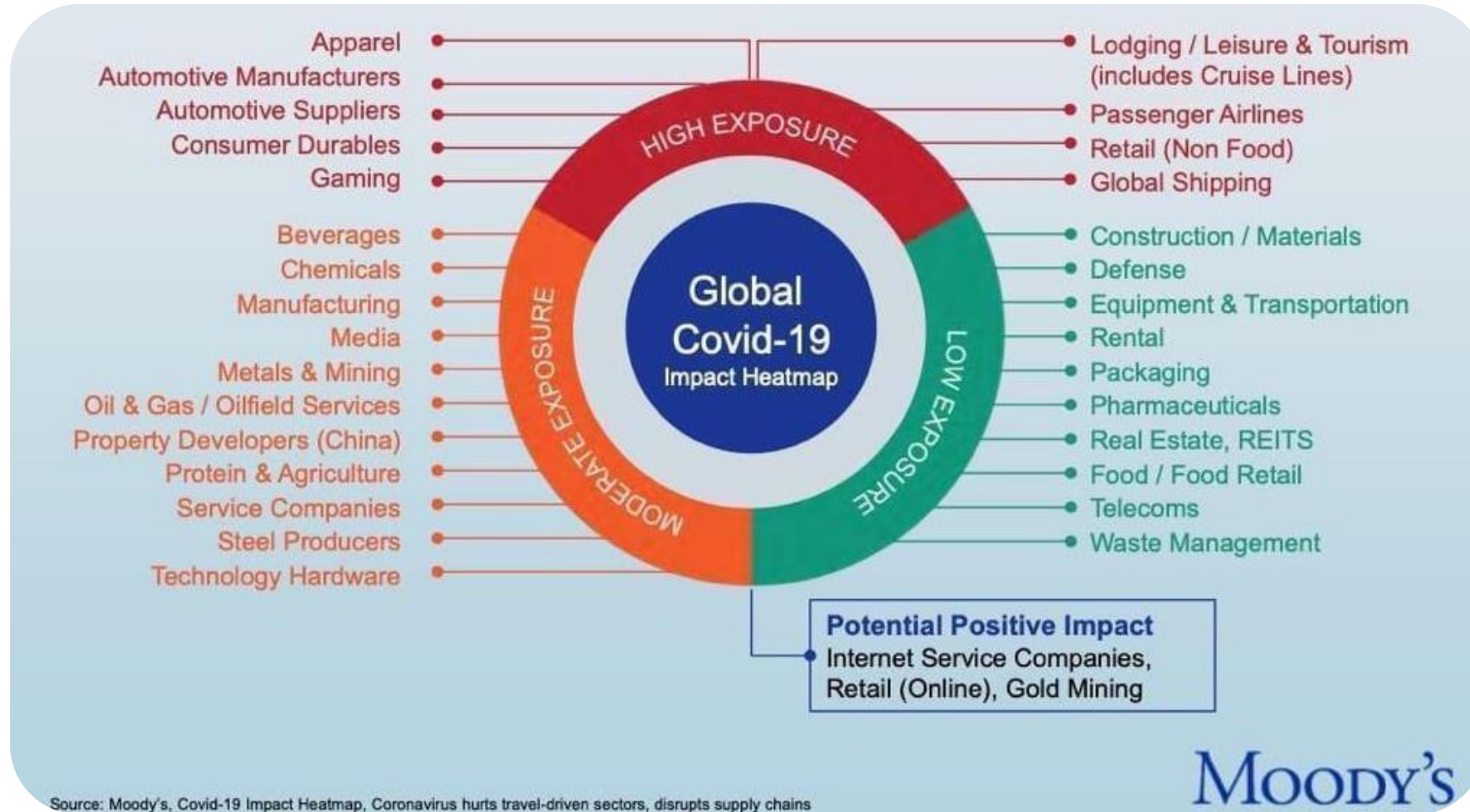


Q&A

The image features a blue globe with a white grid of dots, representing a global network or data flow. Overlaid on this is a dense, chaotic network of thin, yellow and orange lines, suggesting a complex system or impact. The word "IMPACT" is centered in a bold, italicized, yellow font.

IMPACT

Covid-19 Induced economic disruption will disproportionately impact some industry sectors more than others

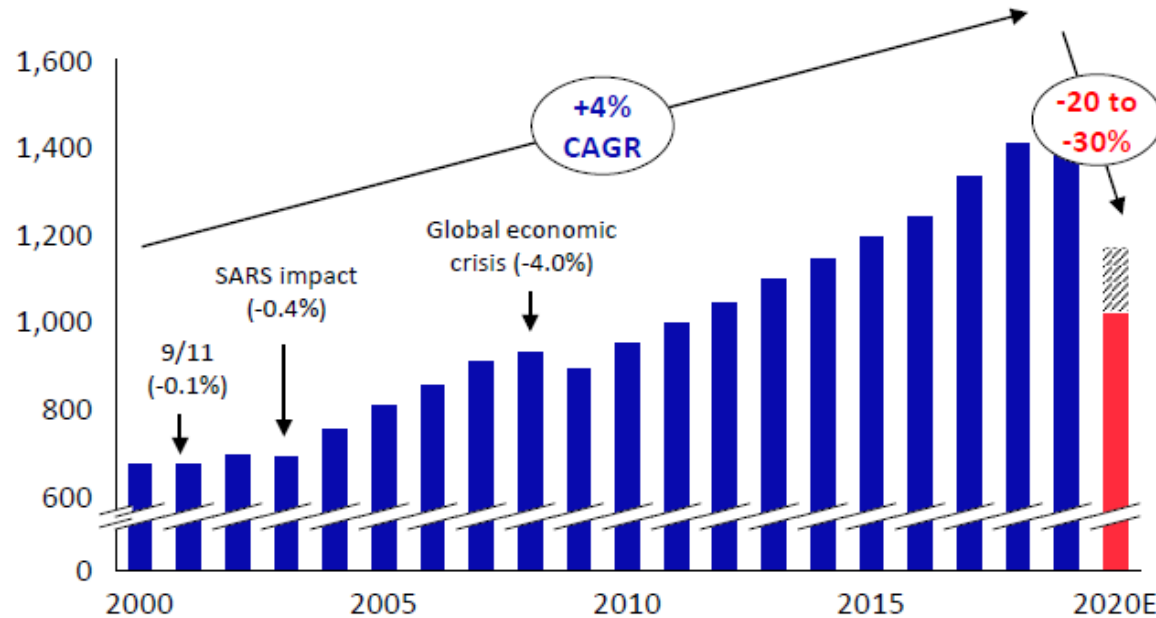


Global impact of \$3 trillion on the industry in 2020 alone

“COVID-19 is having a more severe and sudden financial impact on our business than 9/11 and the 2009 financial crisis combined”

Arne Sorenson, CEO Marriot International

Global evolution of international tourists Number of tourists, CAGR (%)



Demand and financial shock

From (\$1.4Tr) to (\$2.8 Tr)

Loss in global Tourism & Travel world GDP

-290 to -440 mn

in # of international Tourists

~75 mn

Travel & Tourism jobs at risk

1. International Tourism Receipts are expenditures by international inbound visitors, including payments to national carriers for international transport.

Note: Estimates as of March 24th 2020

Source: UNWTO, WTTC, Oxford Economics, Statista, Oliver Wyman analysis

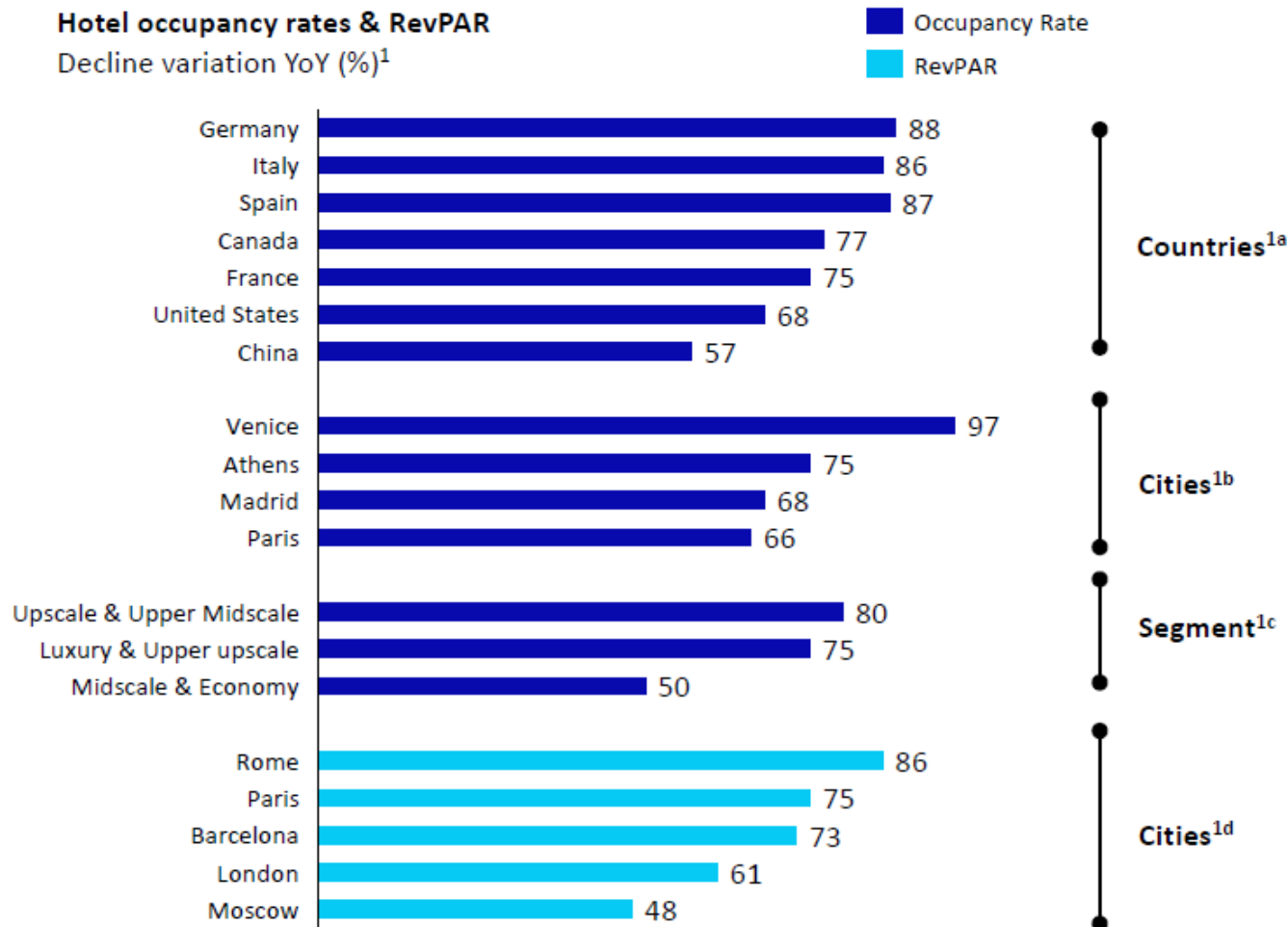


Hotel occupancy at an all-time low

Each country, city or segment is affected by an unprecedented decline in demand

Current Covid-19 crisis surpasses 9/11 or 2009 economic crisis

Hotel occupancy rates & RevPAR
Decline variation YoY (%)¹



X2.2

worse than 2009 in Europe²
(RevPAR: -61.1% vs. -28.0%)

X1.4

worse than '09 in China²
(RevPar: -85.4% vs. -59.1%)

“Covid-19 impact will be more severe economic impact on the hotel industry than 9/11 and the 2008 recession combined”

AHLA CEO Chip Rogers on March 17th 2020

1. Occupancy Rates: 1a. Countries: 7 day lapse variations as of 29/03/2020 1b.: Cities: Week 09/03/2020 variations 1c. Segment: Variations between 10/02/2020 and 22/03/2020 France market 1d: RevPAR section, 28 day lapse variations as of 28/03/2020 2. Comparison of maximum demand slumps (April '09 vs. March '20 for Europe and Aug '09 vs. March '20 for China)
Source: STR 2020 © CoStar Realty Information, Inc.





- VERYCHIC
- adoria
- JOHN PAUL
- d-edge
- POTEL CHABOT PARIS
- ResDiary™
- onefinestay
- PARIS SOCIETY
- GEKKO
- WOJO



- ORIENT EXPRESS
- MÖVENPICK HOTELS & RESORTS
- MANTRA GROUP
- ibis
- ibis STAYS
- ibis DUOPLES
- 306 300
- hotelF1
- NOVOTEL
- Mercure HOTELS
- adagio
- pullman
- swissôtel
- GRAND MERCURE
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- FLYINGBLUE
- Europcar
- QATAR AIRWAYS
- QANTAS
- PARIS SAINT-GERMANS
- DELSEY PARIS
- KOREAN AIR SKYPASS
- AEG
- LENÔTRE PARIS



In midst of every crisis lies great opportunity...

AN UNPRECEDENTED SITUATION

A situation that is very difficult to manage because of its unprecedentedness

Unprecedented and unexpected from multiple standpoints:

- from a **Group activity's** point of view
- in our **ways of working** and processes
- in the **collective efforts** that we must produce

A STIMULATING SITUATION

A stimulating situation that pushes us to ask the right questions

- We see **our capacity to react and adjust** to new daily routines
- We **increase our agility** to rapidly change how we work
- We spend more time on topics that we used to put aside and it helps us to **reflect on alternative solutions and next steps**



The image features a blue globe with a white grid of dots, representing a global network or data flow. Overlaid on this globe is a dense, intricate web of yellow and orange lines, which appear to be paths or connections between various points. The lines are of varying lengths and directions, creating a complex, chaotic pattern that suggests a highly interconnected system. The overall aesthetic is digital and futuristic, with a focus on connectivity and data.

ACTIONS

Unity at the heart of our actions

1. INFORM & INSPIRE

- **Information for impacted customers**
- **Information for impacted employees and supportive actions**
- **Solidarity actions**
- **Inspirational content for customers**

2. REASSURE & BUILD TRUST

- **Adapted information, help & actions in response to covid-19**
- **Reassuring our guests & employees on sanitary measures in our hotels**

3. RECOVER

- **Consistent, clear, appropriate communication**
- **Flexible booking policies & adapted rate structure**
- **Local relevant and targeted messages and offers**





INFORM & INSPIRE

Inform and Inspire our clients, partners, owners, investors...

CANPOL & VOUCHERS

SOLIDARITY COMMITMENTS

POINTS ON A MISSION

ALL AT HOME

BRAND ACTIVATION



轻装出发，尽享关怀

Accor Live Limitless 携手心无界限，共克时艰。我们诚挚邀请您参与我们的慈善计划，为有需要的人士提供援助。您可以通过我们的 CanPol 计划，将您的积分兑换成 CanPol 优惠券，用于支付酒店住宿费用。您还可以选择将积分捐赠给 Accor Live Limitless 慈善基金，支持我们的慈善事业。

了解更多详情



- €70M special cash reserve to assist group employees, medical staff & individual partners through the crisis
- Coronavirus Emergency Desk Accor (CEDA) offers hospitality solutions for medical staff & homeless



- Enable our members to redeem their points by donating them to the Institut Pasteur
- Via Accor Solidarity, to contribute to research in the fight against COVID 19



- Innovative and exclusive content available on our social media
- Bringing passions to our guest's lives
- Worldwide and iconic ambassadors



- Brand community engagement
- Content strategy linked to brand core values
- Local experiences

- Frequent communication to our guests the impacts of the crisis on their bookings and associated CanPol
- Dedicated, local and personalised messages
- Automated voucher system online

Solidarity commitments and corporate social responsibility

ACCOR SOLIDARITY COMMITMENT



« Welcoming, protecting and taking care of others is at the very heart of what we do. Through this impactful gesture, we wish to express our solidarity and gratitude to all those demonstrating courage and selflessness during this crisis. »
Sebastien Bazin – Accor Chariman & CEO

BACKGROUND

- Allocation of 25% of our planned €280m dividend to the creation for a **€70m Covid-19 special purpose fund - the ALL HeartistFund**
- Provide a meaningful and significant **contribution to global solidarity initiatives to address the current health crisis** while planning for future needs, and our objective to **take care of those impacted.**

THIS FUND WILL ASSIST

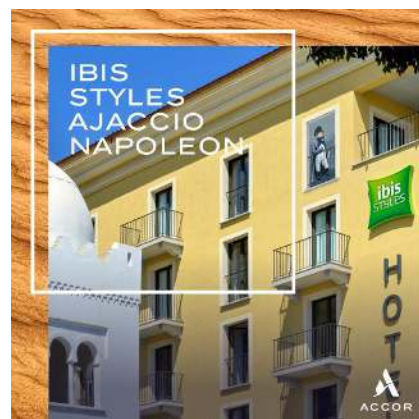
- **+300,000 HEARTISTS** – Accor Network Employees who may be in distress as a result of the sanitary crisis
- **Frontline professionals and first people responders and their families**
- **Individual partners** suffering personal financial issues due to Covid-19



Solidarity commitments and corporate social responsibility

COMMITMENT FROM HOTELS

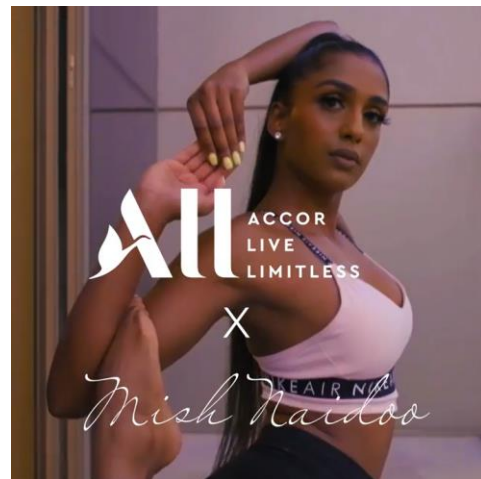
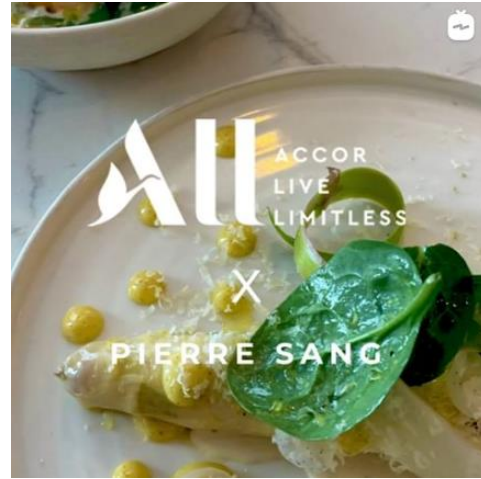
Most of our hotels around the world which are open (about one-third) are being used to support healthcare workers and all those on the front lines of the fight against Covid-19, as well as the most vulnerable populations.



NUMEROUS INITIATIVES IMPLEMENTED FOR LOCAL COMMUNITIES

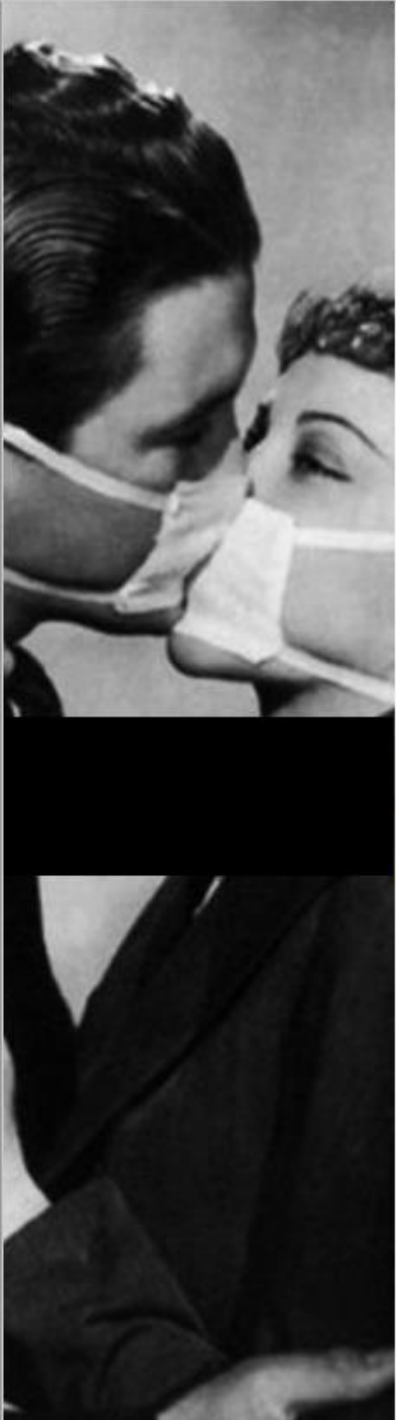
- **France: Coronavirus Emergency Desk Accor (CEDA) offers hospitality solutions for medical staff & homeless.**
In partnership with Assistance Publique Hopitaux de Paris, some hotels are open to people infected with the Coronavirus
- **UK, Belgium: offering accommodation solutions for medical staff & homeless and food preparation**
- **South America: “solidarity rate” to support people at risk & housing medical staff in Sao Paulo**
- **MEA: some hotels used as quarantine or testing centers**
- **NCA: Accomodation and food preparation for medical staff...**

Engaging our clients through their passions with unique & exclusive content



#ALLTogether #ALLFood #ALLMusic #ALLSport





REASSURE & BUILD TRUST

Preparing for a new customer mindset

More anxious

Safety is the most basic human need of them all. Hygiene used to be taken for granted. Currently it is consumers' no.1 concern

→ *According to a google survey from beginning of April, Safety & Health is the 1 reason for consumer not to travel in the next 12 months*

More vigilant and more vocal

Consumers will pay attention to details and question things they had previously never noticed.

“ *I noticed coffee had been spilled down the front of the mini-bar cupboard door, by a previous guest, and had not been cleaned up. This meant this surface had not been wiped since at least the previous guests checked out, [...]*
(recent guest review)

Cautiously excited to be travelling again

Many will probably be relieved to be out and back in touch with others.

More vulnerable, but also more grateful

It's when consumer are helped when they are vulnerable that they are the most moved

“ *We would just like to say thank you, you guys did the best you could for a difficult situation.*
(recent guest review)

More wary of crowds

Consumers will avoid social places and some will prefer eat in their rooms for example



Foundational Global Cleanliness Standards

Will be
announced soon

- **Sanitiser provided** in key public areas (*elevators, restaurant, front desk*)
- Regular staff **health checks**
- Staff provided with **mask and individual sanitiser**
- Staff given comprehensive **safety & hygiene training**
- Guests provided with **individual sanitizer, wipes and mask**
- Reinforced cleaning programme with **frequent disinfection** of all high touch areas & public toilets

- **Social distancing enforced** in all common areas
- Bedlinen bagged in room and washed at **60 degrees**
- In case of restaurant closure, **room service provided** at no extra charge
- Reinforced **food safety standards** & buffet limited to table service
- Access to **medical support** for guests
- Dedicated **customer hotline** to answer guests questions in detail



Reassure best customers, offer more flexibility, and more

*Loyalty status
protection*

*Points validity
extension*

*Flexible
rates*

*And more to come
....*



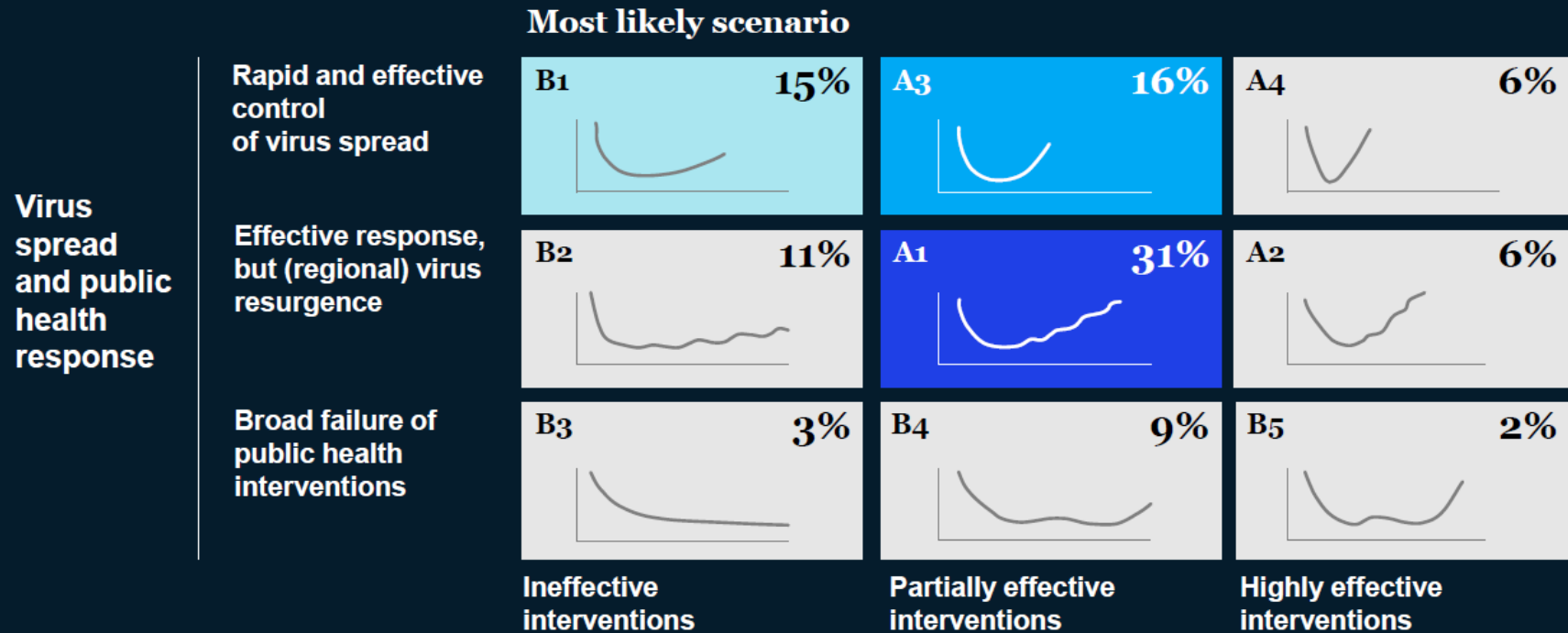
A blue globe with a grid of white dots and a complex network of yellow and orange lines overlaid on it. The globe is centered in the background, and the lines form a dense, chaotic web across the foreground. The text is centered in the middle of the image.

WHAT THE FUTURE HOLDS

Long recovery with some bumps in the road

Executive expectations about the shape of coronavirus crisis in the World

Survey of 2,079 global executives; % of respondents



Knock-on effects and economic policy response

Source: "In the tunnel: Executive expectations about the shape of the coronavirus crisis"; available online at <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/in-the-tunnel-executive-expectations-about-the-shape-of-the-coronavirus-crisis>; McKinsey survey of global executives, April 2–April 10, 2020, N=2,079

McKinsey & Company



Recovery will occur in 4 phases

1-

Passive Recovery

- Customers start mentally recovering and planning for the future
- **Important to maintain brand relationship with past and future guests** through social, email, and editorial content
- Preparation for the future

2-

Local Recovery

- Uncertainty of borders reopening-decreased travel options
- Strong intentions to travel by car in the short term, a domestic recovery
- **Consumption will be focused on Food and Beverage, staycations and/or local intra-country travel**

3-

Intra regional Recovery

- Intra-regional business accounts for 80% plus of business for each of our regions
- It is expected that transportation options will recover intra-regionally before it does internationally
- **Intra-regional travel will be the first step to borders opening**

4-

International Recovery

- **International travel will recover starting with the primary gateways and high tourism meccas.**
- Airline industry is expected to shrink by an approximate 20% in the years to come, emerging and tertiary destinations will simply fall off the radar with viability being largely at risk from a travel and tourism perspective



Acts:

The Story Continues

In

the first days of recovery...



WEBINAR

Afin de vous apporter du contenu au plus proche de vos attentes lors de nos prochains webinars

Merci de répondre à notre questionnaire de satisfaction