

Kimball[®] Hospitality

The Redefined Hotel

Post COVID-19

RESEARCH SUMMARY



Our Collective Path Toward the Future

Since the onset of this crisis, we have seen the power of community and a shared vision come together to solve complex problems beyond our imagination. Collectively, we are faced with overcoming adversity and finding balance in an unknown world. The world is thinking differently, and we are taking action to respond.

Kimball Hospitality has always found value in listening to and learning from others. From hotel's public space areas, guestrooms, guest services, front and back office spaces all the way back to home and places between, we at Kimball International are reimagining what's next and adapting to the future. Committed to helping the hospitality industry thrive, we're actively generating new ideas for hospitality social distancing solutions that support both short and long term needs.

This research summary features extracted quotes and essential topics needed to inform the evolving needs for new experiences in travel, work and living. While there is no one-size-fits-all approach, these core considerations have helped shape how we return to a new normal. We share these key learnings below in the same spirit of cooperation that's inspired us so many times since this pandemic began.

What will a Guest Stay Look Like From Check-In to Check-Out?

Differences Guest May See/Experience:

- Sanitized Arrival
- Sealed Room Upon Arrival
- Contactless Apps for Check-In and Check-Out
- Digital Keys
- Elimination of Credit Card Exchange
- Touchless "Sanistations"
- Health Monitoring

A hotel's defense against the spread of germs will begin before a guest even enters a hotel. At midrange or lower-end hotels, this could mean automatic sliding doors — which many already have — and bellhops wearing personal protective equipment (PPE) at higher-end properties to open and close doors for guests. Hotels may require guests and visitors to be screened for temperature checks as they enter the hotel. (The Points Guy)

Design enhancements to help facilitate contactless check-in and check-out, such as plexiglass partitions at front desks for added protection and key drops for guests' use upon departure. "Clean seals" on certain high-touch items in guest rooms to provide reassurance of sterilized condition. Personal protective equipment for hotel staff, including masks and gloves, to safeguard guests and employees. Hand sanitizing stations located in high-traffic areas throughout the hotel, such as the front desk, breakfast area, elevator lobbies and fitness center. (Business Traveler)

On-property signage and decals reiterating CDC social distancing guidelines, personal sanitation guidelines and the importance of surface cleaning. Communications from front desk staff to guests about precautions taken for their safety and comfort, and reminders about additional safeguards available at guests' choosing. The company will also be exploring the implementation of various technologies in the months ahead, including mobile check-in and keyless entry to further facilitate the contactless guest experience, as well as ultraviolet light instruments, air purifiers and ozone generators to further enhance sanitation. (Choice Hotels - Business Traveler)

Implement Hotel-Wide, Hospital-Grade, Cleaning Protocols

Hotel giant Marriott International has set up a "Cleanliness Council" to advise its global portfolio on best practices. The company, which owns more than 7,300 properties across the globe, is focusing on surface areas, guest contact and food safety. This will include the use of electrostatic sprayers with hospital-grade disinfectant to sanitize surfaces throughout the hotels. (World Economic Forum)

IoT devices and sensors are going to become increasingly important. Not only will they equip hoteliers to monitor cleanliness and distancing, they'll display your commitment to safety in a tangible way—and the value of that can't be overstated. (MarketScale)

Companies like Xenex and Pure Room offer high-tech solutions for disinfection, air purification, and sanitization that can give guests more peace of mind than the standard housekeeping routine. (PhocusWire)

Electrostatic spraying technology uses the highest classification of disinfectants recommended by the Centers for Disease Control and Prevention (CDC) and World Health Organization (WHO) to treat known pathogens”. In addition, the company is testing ultraviolet light technology for sanitising keys for guests and devices shared by associates. (Business Traveler) [Cleaning Measures by Brand](#)

If hotels can convey the message to their guests that they’re being regulated, checked and approved by the authorities for clean and safe practices, it may ease the minds of at least some guests who are eager to get back on the road but are still put off by the idea of staying in a hotel. The USTA suggests that travelers won’t return en masse until there’s confidence that it’s safe to do so, and to boost that confidence, players in the industry must put safety at the very top of the list of priorities, build trust with the travelers by effectively putting into action the plans they’ve laid out and stressing that the future safety of travel depends on a relationship between both the company and the traveler. (ThePointsGuy)

Heightened cleaning protocols for high-traffic areas such as the front desk, fitness centers and pools, as well as other high-touch surfaces throughout the hotel, using hospital-grade disinfectant approved by the U.S. Environmental Protection Agency to combat the spread of COVID-19. .Housekeeping “on-demand” option that allows guests to request delivery of additional toiletries, towels, linens or coffee without having a housekeeper enter the room. Changes in breakfast offerings, with many hotels that provide breakfast replacing their buffet with pre-packaged breakfast items.(Choice Hotels - Business Traveler)



The American Hotel & Lodging Association (AHLA) released [an industrywide initiative](#) at the end of April called “Safe Stay,” which is meant to “change hotel industry norms, behaviors and standards to ensure both hotel guests and employees are confident in the cleanliness and safety of hotels once travel resumes.” Its goal is to get a large majority of hotels and other lodging venues on board with its plans so that the public can once again have confidence in staying at a hotel or other accommodation. Its plan hinges on four main principles: enhanced cleaning standards throughout the whole property; higher-grade cleaning products that adhere to CDC guidelines; social distancing and reduced person-to-person contact; and effective communication between the hotel and its guests about all these processes. (The Points Guy)

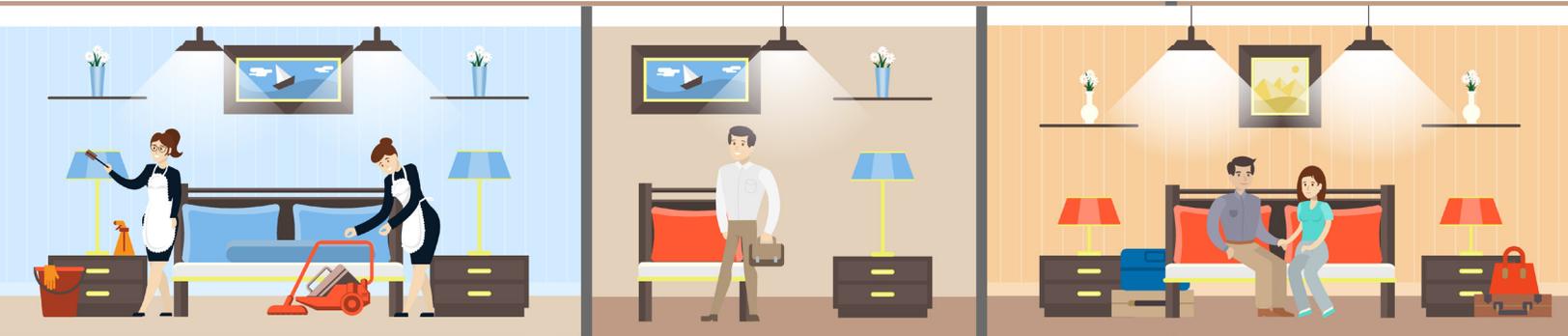
If you can show guests that you have top-level safety measures in place, you’ll not only outpace your direct competition—you may take back some of the guests you’ve lost to short-term rentals as well. (Market Scale)

As increased fears and uncertainty about the COVID-19 coronavirus pandemic continue to spread throughout the country, pest-control company Rentokil announced a new service to meet the growing need of disinfection in businesses. The disinfection service is designed to protect employees and customers from the transmission of viruses, bacteria, fungi and mold. Certified specialists use ultralow-volume disinfection foggers to disperse disinfectant, which is environmentally friendly and hypoallergenic. The foggers create small disinfectant droplets, which treat surfaces—such as floors, handrails and doorknobs—and large areas in a short time frame. The treatment inactivates pathogens in 10 minutes, and guests can be back on site 30 minutes after treatment. (Hotel Management)

Leverage Technology

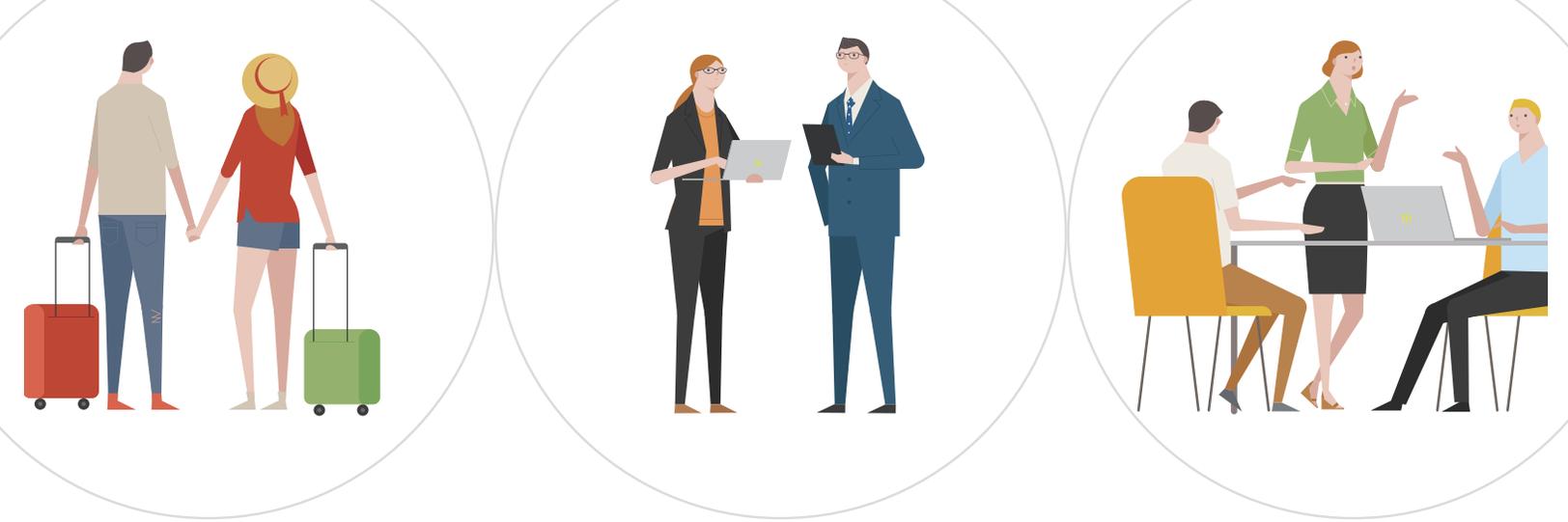
Almost everyone predicts that public spaces will move toward more automation to mitigate contagion, with COVID-19 speeding up development of all types of touch-less technology—automatic doors, voice-activated elevators, cellphone-controlled hotel room entry, hands-free light switches and temperature controls, automated luggage bag tags, and advanced airport check-in and security. (Architectural Digest)

- In addition to the conventional hands-free faucets, and soap and paper towel dispensers, no touch options can be considered for doors, badge readers, and garbage/recycling bins. (Work Design Magazine) Technology should be the driver. Engagement through automation reduces



the number of touchpoints for the hotels and its guests. Biometrics or facial recognition, or the adoption of tools like Alexa for Hospitality to integrate seamlessly with existing amenities and services will allow guests to take advantage of 'virtual concierge' benefits. Further, Alexa and the hotel mobile app will enable guests to leverage their mobile device to remain in control - from playing music to ordering towels, controlling in-room temperature and lighting, or discovering local restaurants and attractions. This challenge could also have a simpler solution: comprehensive programming about cleanliness, for example, could be translated to guest messaging to increase comfort levels. (HospitalityNet)

- Leveraging emerging technologies that allow guests to unlock a door or streamline a no-touch, no-contact check-in process. In-room voice controls ensure guests don't ever have to touch a light switch or TV remote. Apps can streamline in-room dining orders, pillow delivery, or check-out flow. Guest messaging, powered by some AI, enables real time communication pre-arrival but also elicits feedback about a guest's stay. This gives hotels a chance to correct any potential problems while the guest is in-house, thus improving guest relations and dramatically decreasing opportunities for a negative post-stay review. (HospitalityNet)
- There is potential to adapt UVC for safe use in heating, ventilation and air conditioning systems or localized entry points, providing additional safeguards for the ambient air. Additionally, other industries such as medical may already be utilizing tools for sanitation that can be adapted for use within the hospitality sector, making collaboration and communication between industries even more relevant.(Hotel Management)
- With technology, hoteliers can transfer some hotel jobs to completely remote work, such as sales-related or business development positions, eCommerce, Digital Marketing, etc. (HospitalityNet)



Hotel Density and Social Distancing

Furniture arrangements designed to encourage appropriate social distancing in accordance with CDC guidelines (Business Traveler)

Safe is designed to help you re-open buildings sooner and keep your teams, employees, and visitors safe without invading privacy. Safe has three key features – Display, Analytics, and Alerts. Set your maximum capacity for any room, floor, or building and Safe will automatically determine if there's enough space for people to enter. (Density)

These policies are obvious, but can't be monitored enough. Take extra precautions to minimize hotel staff interacting with guests, or guests interacting with each other. Maintain social distancing, whereby people keep a 6-foot distance from each other. If possible, switch to single-use dining products. Hotel staff should wear single-use gloves when handling anything a guest may have touched, and be extremely careful about cross-contamination. Remember, a virus may remain on a glove, just as it would on unwashed bare hands, and gloves should be changed after each interaction. Frequently clean and sanitize surfaces that are touched by people such as countertops, elevator buttons, handrails, door handles, etc. Put up posters and remind staff and guests to wash hands, maintain social distance, and avoid touching their face. (Texas Hotel & Lodging Association)

Hotel Signage/Communications

Furniture arrangements designed to encourage appropriate social distancing in accordance with CDC guidelines (Business Traveler)

People are smart. Use Safe Display to give them the data they need to decide if they're comfortable entering a space. Safe Display is optimized for any digital signage. Especially the signage you already have – tablet, tv, mobile, web, etc. (Density Blog).

Upon arrival, providing hand sanitizing stations upon entry/exit, and instead of leaving a chocolate on the pillow, perhaps consider a branded face mask or travel-sized sanitizer. (Hotel Management)

Consider placing a handout on every bed that details exactly how the room was cleaned. Consider making cleanliness part of your identity – make it visible. On your website or hotel app, give updates on when the room was cleaned, what disinfectants were used, and how air filters are tested and cleaned. Be the first to market with safety as part of who you are. (We Forum)

Hotel Staff Interactions

Perhaps the trickiest aspect of reopening hotels is the interaction between guest and staff.

- A number of prognostications suggest guests will want fewer human touchpoints in a post-COVID normal. This may be true - guests may want to come in physical contact with fewer hotel staff during a stay. This doesn't mean guests want a less experience-driven stay. It's key for staff, departments, and technology to work together seamlessly. Guests will want to remain engaged with the hotel, but these interactions must be automated and within their individual control. Hotel staff will want to still serve their guests without any hesitation or trepidation. Doing so will ensure a high touch stay, (potentially) without any literal touch at all, and keeping the guest comfortable. (HospitalityNet)

Hotel Food and Beverage Services

Changes in breakfast offerings, with many hotels that provide breakfast replacing their buffet with pre-packaged breakfast items. (Business Traveler)

Hotel Brands Collaborate with Health and Safety Councils; Seek to Obtain Safe & Clean Certifications

Hotel operators can look to various sources for hygiene and cleaning tips. For instance, the World Health Organization (WHO) issued interim guidance on the “Operational considerations for COVID-19 management in the accommodation sector.” The Malaysian Association of Hotels (MAH) has begun a “Clean and Safe” campaign, where hotels can become certified as “clean and safe.” The Singapore government has gone a similar route, offering establishments the opportunity to be certified as “SG Clean.” Marriott International also launched its Global Cleanliness Council to “elevate its cleanliness standards and hospitality norms and behaviors to meet the new health and safety challenges.” Whether or not any of these types of programs apply to your hotel brand, or are available where your establishment is located, hotel owners and operators will need to adhere to higher levels of cleanliness—and publicly promote those efforts—to continue to attract guests in this new climate. (Hotel Business) [Clean and Safe Suggestions](#)

Four Seasons Hotels and Resorts has entered into a collaboration with Johns Hopkins Medicine International, the global division of health care and research company Johns Hopkins Medicine, to validate its new global health and safety program, Lead With Care, and provide ongoing, real-time guidance on the evolving COVID-19 situation. Grounded in the principles of care, trust and service, the Lead With Care program will be reviewed and validated by Johns Hopkins Medicine experts and implemented at Four Seasons properties around the world. The new program is about offering genuine care and the highest levels of service, enhancing procedures to protect guests, residents and employees while also ensuring that they feel safe. (Hotel Management)

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Marriott is rolling out enhanced technologies over the next few months, including electrostatic sprayers with hospital-grade disinfectant to sanitize surfaces throughout the hotel. Electrostatic spraying technology uses the highest classification of disinfectants recommended by the Centers for Disease Control and Prevention (CDC) and World Health Organization (WHO) to treat known pathogens. The sprayers rapidly clean and disinfect entire areas and can be used in a hotel setting to clean and disinfect guest rooms, lobbies, gyms and other public areas. In addition, the company is testing ultraviolet light technology for sanitizing keys for guests and devices shared by associates. (Marriott)

Hilton CleanStay with Lysol protection, as the program will be called in North America, will be a rigorous system that incorporates RB's trusted know-how and scientific approach to cleaning practices and product offerings. Experts from Mayo Clinic's Infection Prevention and Control team will advise and assist in enhancing Hilton's cleaning and disinfection protocols. Hilton CleanStay will build upon the already high standards of housekeeping and hygiene at Hilton properties worldwide, where hospital-grade cleaning products and upgraded protocols are currently in use. The goal of Hilton CleanStay is to provide guests with assurance and peace of mind when they stay at any of Hilton's more than 6,100 properties representing 18 brands. The initiative will create a focus on cleanliness that will be visible to guests throughout their entire stay – in their guest rooms, restaurants, fitness rooms and in other public spaces. (Business Wire)

AHLA (American Hotel & Lodging Association) has convened the Safe Stay Advisory Council of industry leaders representing all segments of the hotel industry, who will work in conjunction with public health experts, scientists and medical leaders to develop a series of best practices for the industry, including the following: Enhanced cleaning standards throughout the hotel, including guest rooms, meeting spaces, common areas, and back-of-house spaces. Superior cleaning products with a greater concentration of bacteria-killing ingredients, in accordance with Centers for Disease Control and Prevention guidelines

- Safe Stay Advisory Council enhanced guidelines will be released soon.
- Council members include representatives from the following hotel companies:

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|--------------------------------------|------------------------------|
| -Accor | -Marriott International |
| -Aimbridge Hospitality | -My Place Hotels |
| -Best Western Hotels & Resorts | -Noble Investment Group |
| -Choice Hotels International | -Omni Hotels & Resorts |
| -G6 Hospitality | -Radisson Hotel Group |
| -Hilton | -Red Lion Hotels Corporation |
| -Hyatt Hotels Corporation | -Red Roof |
| -InterContinental Hotels Group (IHG) | -Wyndham Hotels & Resorts |
| -Loews Hotels & Co. | (Hotel Management) |

In May 2020, Hyatt plans to introduce a GBAC STARTM accreditation through a performance-based cleaning, disinfection and infectious disease prevention program that will focus on establishing hotel environments that are sanitary, safe and healthy. The GBAC STARTM accreditation will include detailed training at more than 900 Hyatt hotels worldwide, and Hyatt intends to complement this with regular internal and third-party auditing. (Hyatt)

Evolution of the Hotel

To have lots of unnecessary elements in a room design has had its day! Clients and guests will have expectations when it comes to easy-to-clean surfaces. (Hotel Designs. Fiona Thompson, Principal, Richmond International)

Will this pandemic create a desire for more minimalist design? It will certainly be a design driver. After all, space is luxury. To have lots of unnecessary elements in a room design has had its day! Clients and guests will have expectations when it comes to easy-to-clean surfaces. It will be interesting to see how long concerns last when this is all over, because people's behaviour does tend to revert back to how they used to use spaces. (Hotel Designs.)

Designers will increasingly call on antibacterial fabrics and finishes, including those that already exist—like copper—and those that will inevitably be developed. (Architectural Digest)

Self-cleaning bathrooms as well as pod rooms—smaller modular spaces that can be sealed off from other guests while also offering the ability to be quickly torn down and disinfected. (Architectural Digest)

Certain construction elements already standard in health care may find application in other public spaces, such as reducing the number of flat surfaces where germs can sit, and installing ventilation systems that allow for removing potentially contaminated air from any given area. (Architectural Digest)

A renewed focus on guestroom functionality and technology is needed in order to accommodate the new ways in which guests will utilize the space. For example, guests may want to work in their room rather than in a shared lobby space. Rooms should provide work areas, increased technology, and tools to accommodate these types of uses. Instead of having dinner in the hotel bar, more guests may choose in-room dining options. Augmenting the menu, such as creating a bento box, could offer a branded and safe meal choice. (Hotel Management)

New guest and employee service protocols that emphasize safety should be implemented. While a practical consideration, owners and operators can take creative license to make these measures part of the guest experience. For example, bringing back the “white glove” approach when handling guest items. (Hotel Management)

Look for chatbots and virtual travel assistants to become more visible, delivering beyond tasks such as ordering room service or getting information on your flight. This technology is evolving to become a true virtual assistants and concierge service across the guest's journey, such as ordering tickets to a show or recommending the hottest restaurant in town based on liked-minded fellow travelers' reviews. (Proprmodo)



Sources

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