

A top-down view of a breakfast spread on a light grey marble surface. In the center, a small white ceramic bowl with a brown rim holds three pastries: a large croissant, a smaller croissant, and a round bun with dark chocolate chips. To the right, a yellow ceramic cup is filled with a frothy coffee. Above it, a small green ceramic cup contains a dark liquid, likely coffee. Below the bowl, a white ceramic pitcher is partially filled with milk. In the foreground, two large croissants and a round bun with chocolate chips are arranged on a white rectangular plate. The pastries are golden brown and flaky. The overall aesthetic is clean and modern.

*Délicrance*  
LIVE EVERYDAY DELICIOUS

**HOTEL F&B:**

*Beyond the new normal*



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## About this report

*HOTEL F&B: beyond the new normal* is an actionable guide to support the hotel industry in getting back on its feet. Rebuilding businesses will take careful consideration and to help navigate this new, post-Covid-19 reality, DéliFrance, in partnership with Bidfood, has launched a hotel task force.

Using our expertise, as well as industry insight and specially commissioned research, we are here to support hoteliers by helping them to anticipate and prepare for the future. From insights into what travellers will expect when it comes to breakfast to practical advice on how to offer the best experience to guests while remaining safe and compliant, we have got it covered.

We know the next few months are going to be all-consuming and our task force is here to support you through this challenging time.

### Original research

We interviewed 1,000 adults who regularly stay in hotels and eat breakfast. Interviews were conducted in May 2020.



### Operator insight

We surveyed Bidfood's hotel customer database and the Food & Beverage Managers' Association members in June 2020.

### THE INSIGHT



### Industry insight

We engaged top industry specialist Marc Finney, Head of Hotels & Resorts Consulting at Colliers International.

### DéliFrance expertise

We used our own expertise and findings from our 2019 Hotel channel global study.





## Executive summary

Restricted under lockdown, the hotel industry now faces a challenging re-entry. With the vast majority of sites having been closed for more than three months, getting up and running again is going to take time and careful consideration.

The good news is our research suggests that **consumers intend to return to both leisure and business travel**. Domestic travel will return first, as many international travellers wait for airlines to recover and quarantine measures to be lifted. Meanwhile, our insights expert Marc Finney, Head of Hotels & Resorts Consulting at Colliers International, says **larger gatherings, such as conferences and exhibitions, are not expected to resume until at least the end of 2021**.

Our research shows that the majority of hotel guests have at least some level of concern about staying in hotels in the future. As we come through this global health crisis, it is understandable that **almost half of respondents say they are concerned about the hygiene and cleanliness of public areas (46%)** and their **hotel rooms (49%)**, while **37% worry about social distancing in dining rooms**.

Operators expect that greater hygiene measures coupled with social distancing requirements mean **change is afoot when it comes to the breakfast buffet**. This is likely to result in staggered time slots instead of an open buffet. Measures may also include staff service (rather than self-service), no menus, pre-sliced bread and individually packaged pastry items.

There are also some interesting variations between hotel types, with budget hotel users more likely to use the breakfast room, while premium hotel visitors may opt for room service to avoid the buffet. While changes may be in order, it's important to note that **breakfast is a key factor in hotel stays**. In fact, Délifrance research shows that almost a quarter of hotel guests say that **breakfast quality is one of their top three priorities when choosing a hotel**.

Overall, **guests will be making hotel choices based on promises around cleanliness and hygiene** – from check-in to their final breakfast. Here, **clear communication on cleanliness - online, in marketing and through social media – will be key to securing future visitors**. While the necessary changes may seem daunting to begin with, once the first few guests are through the door, the landscape will become clear. We've seen this happen in retail as shoppers return to stores.

We all look forward to checking into hotels again and we hope this report will help hoteliers to successfully navigate the new environment and welcome back their guests.



## Expert opinion

**Marc Finney, Head of Hotels  
& Resorts Consulting,  
Colliers International**

There is not a single hotelier that can point to any set of circumstances that have had such a profound effect on our industry as Covid-19. In the UK at the end of April, more than 85% of hotels were shut and those that were open were running occupancies of little more than 10%, providing for key workers and the homeless.

*There is not a single hotelier that is planning to open with everything as it was before.*

Whether you have come to loathe the phrase or not, there is definitely going to be a 'new normal'. It is very likely that a lot of hotels will have to open initially on a bed and breakfast only basis, with restaurants, bars, function spaces and spa rooms being left for the future.

This survey proves that customers are going to be judging hotels and making their buying decisions in a different way. Cleanliness has always been very important, but this is now more vital than ever as the top two customer concerns are related to cleanliness.

Following after this are the clear concerns that guests have when it comes to breakfast buffets. Hoteliers are going to have to rethink this aspect of their product. After all, breakfast service is very often the last impression a guest has of a hotel before leaving the property – and it is a major factor in a guest's decision to rebook.

Looking forward, any hopes of a quicker 'V-shaped' recovery have now gone. The experience of hotels reopening in China and other European cities have shown that we are in for the long haul. Any market that relies on foreign travellers, large conferences or events is going to have an even slower recovery. Therefore, attracting domestic tourists will be key.

As such, those that get this right in the 'new normal' will steal a march on their competitors.





## What do consumers expect from the future?

### Key concerns



There is no doubt that the global health crisis has impacted what consumers will expect from businesses in terms of hygiene, health and safety. While these expectations will include extra cleaning measures and reassurances from operators, they will also involve social distancing measures, which could mean spaced-out tables in the dining room or staggered sittings.



MARC FINNEY

*"Hotel operators will take hygiene concerns very seriously. Although many guests may be relaxed, procedures must be in place for those slightly more nervy travellers. We can expect to see more partnerships and declarations of cleanliness, such as Hilton's Clean Stay programme in association with the makers of Lysol and Dettol."*

## Consumer travel plans

### Future hotel use



### Family plans



63% of those surveyed say they are most likely to travel with their **partner and/or family** in the future



15% are most likely to travel **solo** for leisure



MARC FINNEY

*"There are a lot of people who have been sitting at home for a long time who can't wait to get out and do something. I suspect there is quite a lot of pent-up demand for leisure holidays. Business travel will also return quite quickly because people have got to start getting out and seeing their customers again. The domestic market recovery should take us up to occupancy of around 40-50% by the end of the year. It will be during next year that you'll start to see the return of the international market. The last piece of the puzzle – meetings, incentives, conferences and exhibitions (MICE) – will recover at the end of 2021, through to the beginning of 2022."*

Encouragingly, people do still intend to travel and use hotels. It is worth noting that **most of our respondents (59%) expect to travel more for leisure, but less for business**, while just under a quarter (12%) expect to travel more for business, but less for leisure.

Indeed, time at home with the family certainly seems to have made an impression as almost two-thirds of those surveyed say they are most likely to travel with their partner and/or family in the future, while 15% say they would travel solo for leisure.

*"As an NHS worker, I've been staying in hotels throughout Covid-19 and it's an interesting balance between health and safety and sustainability. I'd like to see hotels using Covid-19 as an opportunity to find a sustainable and reassuringly safe solution."*

EMMA, BRIGHTON



STÉPHANIE BRILLOUET,  
MARKETING DIRECTOR,  
DÉLIFRANCE



*"This year has been tipped as the year of the staycation. Our research reflects this, and with more leisure and family travel expected this is a good time to look at the depth of your offer and portion size to cater for both junior diners and the increasingly health-conscious consumer. Over 30% say eating healthily has become a higher priority since the start of lockdown<sup>1</sup> and our findings show two thirds of guests would be interested or very interested in the choice on mini pastries."*

<sup>1</sup> Source: Lightspeed/Mintel 2020



# What do operators expect from the future?



57%

of operators feel that the government could be doing more



81%

of operators are not planning to increase room rates



70%

of operators say labour costs will be the biggest outlay



67%

of operators say generating revenue from F&B is a concern

The past few months have been tough for operators and some 57% of those we spoke to feel the government could be doing more to help them safely reopen.

Now the time has come to welcome back guests, there are several common themes in the way hoteliers expect to conduct business. Our survey shows that most operators (81%) are not planning to increase room rates. This should please the 31% of consumers surveyed who say this is one of their concerns.

As expected, operators foresee a focus on domestic tourists, which correlates with 88% of our consumer respondents saying they are likely to travel more for leisure in the future.

As the doors reopen, more than two-thirds of hoteliers (67%) say generating revenue from F&B is a concern. This is second only to apprehensions around profitably running a hotel while safely implementing social distancing front of house.



**ROY SOMMER**  
CHAIRMAN OF THE FBMA

*"Generating revenue from F&B is going to be challenging. The first projected occupancy rates are unsurprisingly low and with social distancing measures in place, popular seating like afternoon tea and brunch will be limited in numbers – at least in the immediate future."*



88%

PPE most universal measure being taken by hotels

BUT...

25%

of guests don't want to see PPE in the breakfast room

PPE for staff is the most universal measure being taken by hotels (88%), but not all guests want to see this in the breakfast room (only 25%). This means operators will need to strike a careful balance to keep staff and guests safe without 'scaring' consumers.

With labour costs expected to be the biggest outlay, according to 70% of our respondents, suppliers will need to consider less labour-intensive products and use more versatile ingredients.

*"It's about cleanliness and sanitisation. Will the waiting staff assure each table that they have just sanitised their hands? Better still would be a wall-mounted sanitiser that staff could be seen using by customers each time they enter and exit the kitchen."*

JIM, LIVERPOOL

## Communication strategy



86%

of hoteliers plan to emphasise safety measures in their marketing, largely through website communication and increased signage within the hotel.



**STÉPHANIE BRILLOUET**

*"It's no surprise 90% of hoteliers surveyed will emphasise health and safety measures in marketing. Direct bookings have increased 37% year on year<sup>2</sup> as guests look to establish what hotel services are open and what precautions are being taken to operate safely. Hygiene and cleanliness of their room, hygiene and cleanliness of public areas and social distancing in dining rooms are the top three consumer concerns highlighted in our research, which should help hoteliers get messaging right for this marketing."*



**ROY SOMMER**

*"There will always be two groups of people post-Covid-19 – those who aren't as anxious and those who are and will be actively looking at the health & safety measures to feel protected. Marketing will be important in this to communicate what measures have been taken. Hotels will need to provide clear reassurance to ease any concerns – it will determine where guests choose to stay."*

<sup>2</sup> Source: ProfitRoom research, June 2020

*"I'll be looking much more closely at what procedures hotels have in place. Previously, I was a huge fan of Airbnb, but now I would have much more confidence with hotels given regulation differences. Comparing hotel with hotel, I'll have more confidence in the bigger chains that can 'better afford' the hit on profit to incorporate extra procedures and labour."*

ANDREW, INVERNESS

Breakfast remains an integral part of the hotel experience and our operators are gearing up to make it safe and enjoyable. Taking a closer look at service, 58% say they will offer more wrapped and takeaway items. Meanwhile, 51% expect to do table service only, with 44% only offering à la carte menus and 32% providing pre-bookable dining time slots.



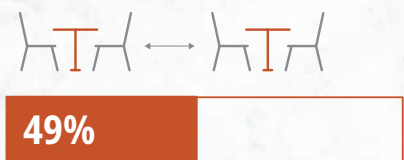


# What do consumers expect from breakfast?

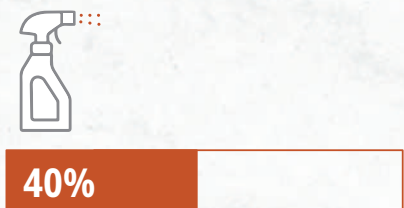
The top three things breakfast room users want to see in place:



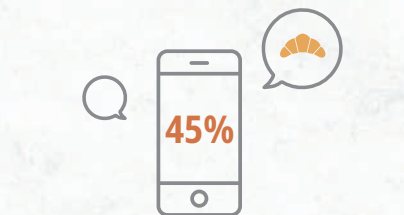
Free hand sanitiser



More space between tables



Enhanced cleaning protocols



of consumers would be willing to pre-book a dining time slot for breakfast or use more tech for the ordering process

Breakfast is, of course, also a big deal for hotel guests. Délifrance research shows that it is the benchmark for one in 10 consumers, while almost a quarter (22%) say that breakfast quality is one of their top three priorities when choosing a hotel.

As we come through the coronavirus pandemic, the most important meal of the day will need some extra thought.

Of the 76% of consumers who currently use the breakfast room, 37% want to continue to use it. However, around a third (32%) would prefer to avoid other hotel guests and just over a quarter (27%) would rather avoid the breakfast buffet altogether.

In fact, our research shows that almost half (45%) of guests would be willing to pre-book a dining time slot for breakfast or use more tech during the ordering process - for example a click-and-collect service.

*"I'd probably only use the buffet if everything was individually wrapped. I'd like to see more 'tapas-style' items for one, like they already do for some desserts. It's important for me that sustainability isn't compromised and I'd be fine to use the usual reusable cutlery and plates so long as they're all thoroughly cleaned."*

ANGELA, LONDON



STÉPHANIE BRILLOUET

*Df*

*"Our stats on the importance of breakfast when influencing a stay speak for themselves. It's also the last impression guests will have, so it pays to get it right. As we enter the new normal with heightened expectations and a greater trend towards the experience<sup>3</sup>, this will be even more important."*



MARC FINNEY

*"I think the breakfast room environment will always remain popular. There will be some phasing of timing - people are not going to be very happy, standing shoulder to shoulder, waiting for things. Many hotels will be gearing up to a system of more direct delivery from a kitchen environment or utilising room service."*



## Room service

If your hotel has the resources, room service will also be an increasingly popular option. Our research shows that 41% of consumers who usually use the breakfast room would be prepared to eat breakfast in their room. And of those expecting their future travel to be mostly for business, 70% claim they always eat breakfast at their hotel (compared with an average of 53%), with 76% of those guests saying they will choose room service more in the future.

*"I love a cooked breakfast buffet. But when it comes to eating it going forward I would prefer for it to be served, rather than having multiple guests sharing the same tongs for hot food. And there needs to be a lot of hand sanitiser - both next to the buffet and in corridors and entry/exit points - to encourage guests to keep their hands clean before anything is touched."*

MARTIN, LONDON



<sup>3</sup> Source: Lightspeed/Mintel 2020: Mintel's Global COVID-19 Tracker



# On the plate



## STÉPHANIE BRILLOUET

*"Our research shows the breakfast buffet isn't dead; it just needs a reinvention to give guests confidence and make it relevant into, and beyond, the new normal. While single portions and pre-packaged items are a quick and easy win, take the time to look at the consumer trends so you know your range is right too. Globally, 75% of guests have a bakery product for breakfast<sup>4</sup> and our research shows 76% of UK consumers expect croissants to be available."*

While the logistics of breakfast are set to evolve, so are the choices. Just over half of our respondents (51%) say their breakfast buffet selections are likely to change, with half of those consumers shunning the buffet altogether. Elsewhere, the key requirements call for individually wrapped products, better coverings and for the buffet to not be self-service.

On the flip side, just under half of consumers (49%) don't think their buffet choice will change. Within that number, three-quarters don't want choice to be limited, while 42% want to be able to choose their own portion sizes.

*"I really hope this isn't the end of the breakfast buffet. It's one of my guilty pleasures, especially in a nice hotel. But to be tempted back and enjoy it without worrying, I'd need to see more pre-wrapped and single-serve options, maybe things like serving spoons being used just once and definitely non-wrapped items being fully covered if not served for me."*

MAIRI, CHELTENHAM



**27%**  
OF CONSUMERS ARE  
MOST LIKELY TO EAT A  
PASTRY WITH BREAKFAST<sup>5</sup>



**61%**  
OF CONSUMERS  
CHOOSE BREAD AT  
BREAKFAST TIME<sup>6</sup>

## Buffet options



Of the 51% of consumers who say their breakfast buffet choices are likely to change:

- 50% don't want to use the buffet at all
- 48% would like buffet items to be covered better
- 45% would like the buffet to not be self-service
- 50% would like individually wrapped products to be available

Of those 49% who don't think their buffet choice will change:

- 77% don't want the choice to be limited
- 42% want to be able to choose their own portion sizes



## STÉPHANIE BRILLOUET

*"In the short term, we expect to see an increase in single-serve and pre-packaged options. While 25% of consumers say the environment has become a higher priority since the start of lockdown, 63% of UK adults would prefer to buy products with packaging to protect the contents from contamination."*<sup>7</sup>



<sup>4</sup> Source: Delifrance online quantitative studies on 500 consumers in France, UK, USA & China, 2019

<sup>5,6</sup> Source: Delifrance Great British Bakery Report 2019

<sup>7</sup> Vypr online research for Delifrance 2020



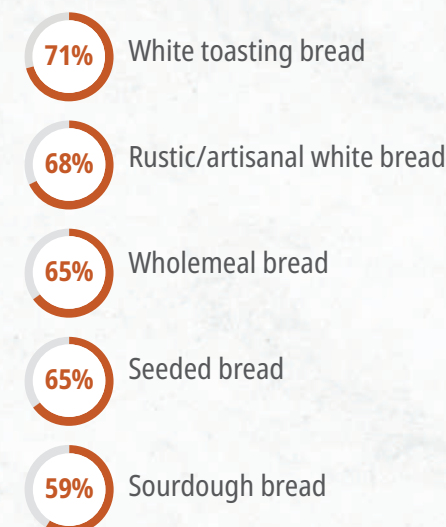
# Bread & Viennoiserie

Bread and viennoiserie are firm breakfast favourites and, according to Délifrance research, a massive **97% of guests, who have breakfast in hotels, have a bakery item, with around half (49%) opting for pastries, while 48% enjoy bread and expect a decent range.** Our research shows that while white toasting bread is popular, it is closely followed by a whole range of speciality breads.



## Bread

### Bread choices



In terms of how to safely display the food for self service, consumers are unsure about how best bread should be made available, with **29% opting for baskets of pre-sliced bread and 32% preferring wrapped options.**

Interestingly, those who are planning to choose room service more in the future are more likely to be interested in speciality and healthier breads. Think sourdough, seeds and breads that are high in protein and/or fibre. Savoury pastries win out over sweets for room service fans, while fruity pastries are more popular than the chocolate options preferred by buffet-goers.

Overall, it is important to note that consumers still want – and expect – a variety at breakfast time.



## Viennoiserie

More than three-quarters of consumers still expect and want croissants to be available, with sweet pastries the most popular (71%), while 63% of those surveyed would like savoury pastries.

Indulgence beats health concerns, with **61% of consumers opting for indulgent pastries at breakfast.** This is balanced with **63% wanting to see mini pastries available** – allowing both indulgence and variety.

In terms of display, it is clear that consumers would prefer to see wrapped pastries – almost half (**49%**) would opt for **individually wrapped pastries** and **12% want to see a wrapped selection of mini pastries.** Only a quarter of consumers expect pastries to remain unwrapped.



**49%**  
OF CONSUMERS  
WOULD PREFER TO SEE  
WRAPPED PASTRIES



MARC FINNEY

*"If you've got things out on the buffet it's going to be a lot easier to get people to accept them if they are wrapped or sealed."*

# Conclusions

## Practical next steps

As guests return to the hotel, operators can take several measures to ensure customers are happy. Extra reassurances around **hygiene and cleanliness** will go a long way, not just in bedrooms but in the breakfast room, too. **Staggered breakfast service times** will help to maintain **social distancing** measures, while **individually wrapped items** will offer peace of mind. If your operation allows, **staff service, click-and-collect breakfasts and room service** may also appeal.

Breakfast is an integral part of the hotel experience and a decent, well thought out offer will go a long way with tomorrow's consumers.



MARC FINNEY

*"I don't think that it will be too long before people start seeing customers coming back. We humans are social people. By the end of 2021 – 2022 at the latest – the world will look remarkably similar to how it did before."*



ROY SOMMER

*"This is a good time for hotels to start being creative and review their concepts. It will take time for the market to recover, we all know that. But how F&B managers and directors cope with the changes and turn this around is what will be the most exciting thing about the future."*



STÉPHANIE BRILLOUET

*"While there's no doubt recovery will be tough, savvy operators that embrace change and instil a sense of trust in guests will succeed. Expressly communicating cleanliness - showing, telling, living and breathing it at every stage of the guest's journey - will help attract back custom and allow guests to confidently enjoy their stays."*





# The ideal partner

Using our heritage, artisan techniques, baking tradition and our exacting standards of taste and quality, we help our customers around the world attract, satisfy and delight consumers at every moment of the day.

## Our solutions to support you

We distribute frozen and easy-to-prepare products in order to provide you greater flexibility and better cost-management thanks to on-demand cooking and waste reduction.

## A complete bakery offer

Délifrance offers a wide range of breads including crafted, artisan-inspired and rustic products; a wide range of classic French style viennoiserie & pâtisserie, as well as international bestsellers; and puff pastry savoury products.



### Bread



### Viennoiserie



### Pâtisserie



### Savoury



*Délifrance*  
LIVE EVERYDAY DELICIOUS

To find out more about how we can help you help your customers live every day delicious, please get in touch with:

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