

GAMING & HOSPITALITY

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R E S E A R C H C E N T E R

2020 HOSPITALITY TREND REPORT

Sample

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Introduction

The intentions of this report are to provide those within the hospitality industry, who decide which technologies are worth investing in and how those technologies will be implemented, with insights into trends that will enhance the guest experience and result in positive business outcomes. As the hospitality industry continues to embrace new technologies, the guest experience needs to remain top of mind if the business wishes to remain viable and succeed in generating revenue, obtaining ROI, and maintaining a competitive edge.

An industry as unique as hospitality depends on the human interactions that take place between guests and associates to achieve success. Therefore, the technologies being suggested in this trend report are not being recommended as mechanisms to replace or remove these interactions. Quite the opposite is being suggested. The technologies that are included in this report are being put forward with the goal of enhancing the experience so that it is faster, easier, safer, more personalized, and surprisingly delightful.

These trends are intended to be applicable to the entire hospitality industry, regardless of geography, size, or sector. For each of the trends put forward, how each of these trends might be relevant for your venue(s) in the next three to five years should be considered.

CIO budgets MUST consider guest expectations

In 2019 it became clear that Hospitality CIOs could not reduce their budgets, with one study finding 54% will increase and 42% will maintain their budgets.¹

Additionally, 70% of travel buyers will spend more time evaluating and implementing technology in the next 5 years.²

¹Hospitality Upgrade, "2019 Hospitality CIO Survey Results"

²Hospitality Trends

*"58% of diners and 66% of hotel guests indicate they **will pay more for technology** they deem important [to their visit]."*

Source: Hospitality Technology, "8th Annual Customer Engagement 2019 Technology Study"

The Trends



Advanced Wireless

Connectivity that increases speed and efficiency. Both 5G and Wi-Fi 6 are included in this technology. 5G or fifth generation technology is high-speed cellular technology that allows users to download and process data at a faster rate while allowing for greater computing power. Wi-Fi 6 is the latest generation of wireless networking technology that can support more users, at a faster speed, while serving a larger area.



Immersive Hospitality

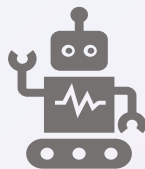
Using the functions of augmented and virtual realities, the organization can enhance the guest experience from pre-booking to checkout. Guests use devices that enable a mixed reality tour of the venue and rooms or simply to be entertained during their stay. Likewise, associates use mixed reality for training and spatial design purposes.



Vision Recognition

A form of biometrics, vision recognition is currently changing the hospitality industry. Images, pictures, and videos can be analyzed to determine insights about an individual or space. This technology includes facial recognition, however, it goes beyond that to understand behaviors, satisfaction levels, and recommendations for improved guest service.

The Trends



Robotics

The operation and application of robots in the hospitality environment to surprise the guest with a delightful interaction while conducting a simple service such as delivering, greeting, or cleaning. The process of automating job functions is to reduce negative impacts to guests and increase staff productivity.



Hyper-Personalized Guest Experience

With the ability to track guests as they move through their digital guest journey, enhanced through the modern methods of connectivity such as the internet of things (IoT), artificial intelligence (AI), and mobile devices, the business can then leverage the data to provide tailored and specific suggestions to the guest. The personalized experience is about meeting the guests' needs in real time.

The Trends



Voice Assistants

A type of voice recognition technology, voice assistants respond to commands that guests and associates make through tools such as hubs or smart devices. The platform will recognize the command, which is usually either entertainment or utility based, and action a response accordingly.



Blockchain 2.0

From supply chain management to booking and payment to loyalty points, there are several ways in which the decentralized public ledger can influence the industry. Transactions of all types that occur on the block are securely and actively tracked.

The Hospitality Value Drivers

Before implementing trending technologies, it is necessary to have a holistic understanding of how they will impact the guest experience and the venue(s) they visit.

There are five different value drivers that make up this understanding:

- Business Growth
- Risk & Resilience
- Operational Excellence
- Guest Value
- Service Quality

These value drivers are used to understand *what is or is not driving* a particular trend. This is achieved by identifying the value drivers for each trend as superior, strong, medium, or weak.

Superior — ● **Strong** — ◐ **Medium** — ◑ **Weak** — ◒

The Hospitality Drivers

Business Growth

- Drives sustainable growth
- Diversifies methods of generating revenue
- Increases the business market reach

Risk and Resilience

- Mitigates and withstands rapid changes across the IT landscape
- Secures guest information while protecting brand assets
- Easily integrates with current technologies, projects, and strategies
- Is readily adopted by both guests and associates

Operational Excellence

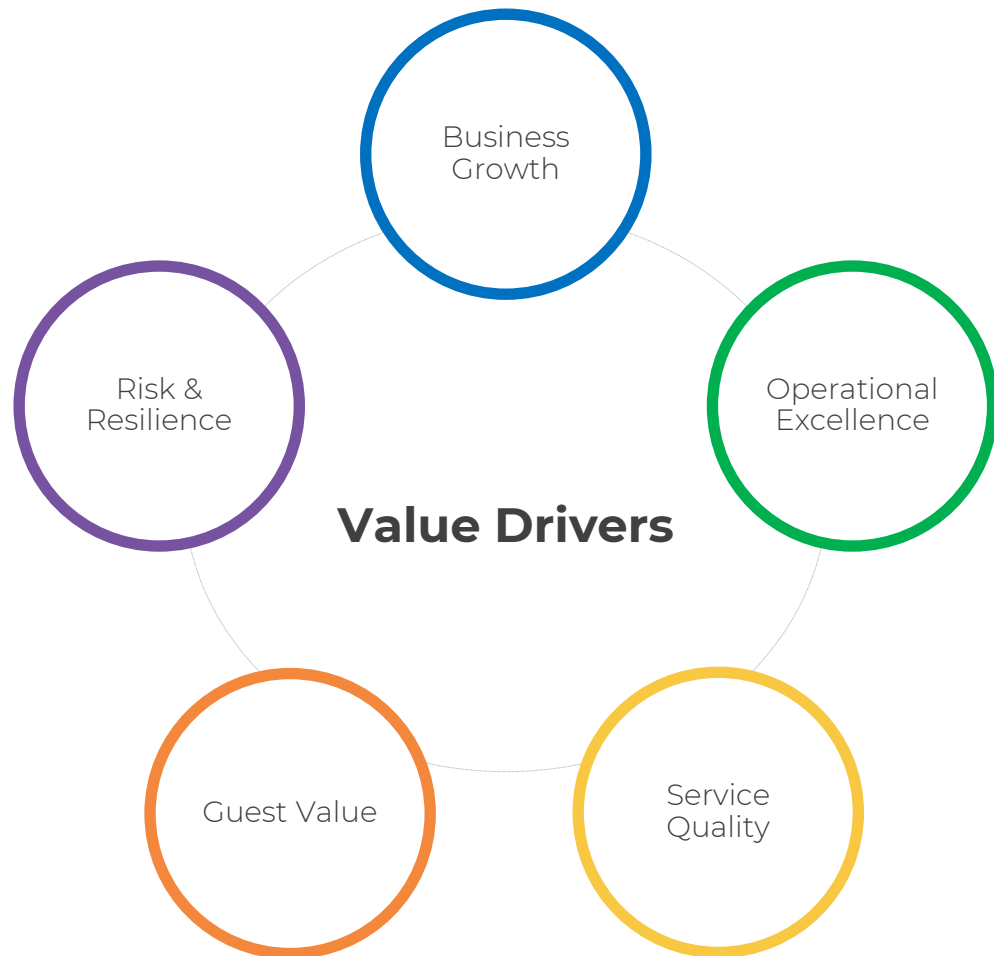
- Provides transparency in the flow of value to the guest
- Empowers associates and promotes teamwork
- Improves responsiveness in problem solving

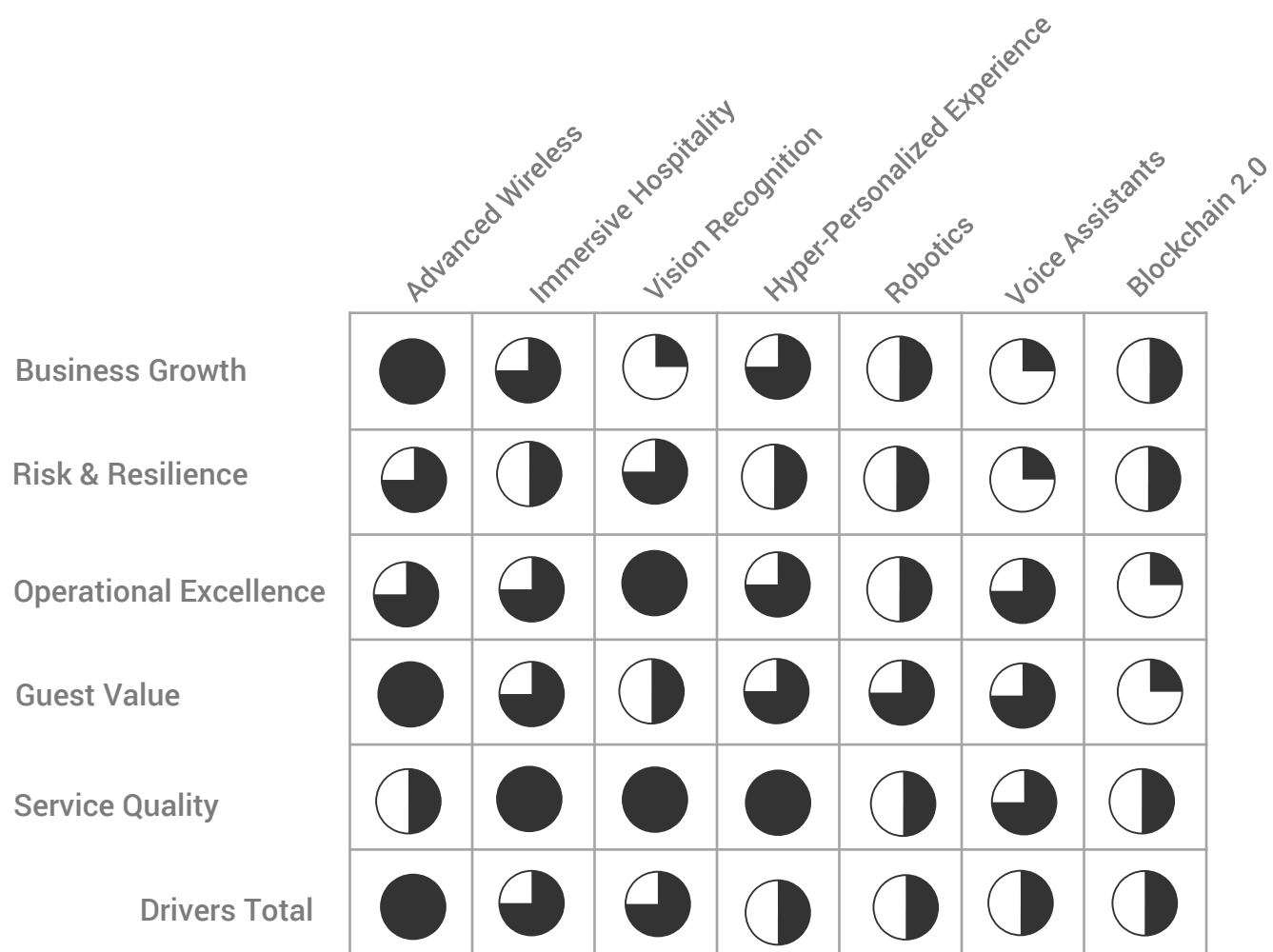
Guest Value

- Surprises and delights associates and guests
- Connects associates with guests on a personal level
- Focuses on enhancing efficiency and convenience

Service Quality

- Is readily available technology
- Has active vendor support and expertise
- Enables first-to-market or unique market positioning





How does each Hospitality trend measure against these value drivers?

Where is Hospitality technology today?



ARTIFICIAL
INTELLIGENCE



INTERNET OF
THINGS (IoT)



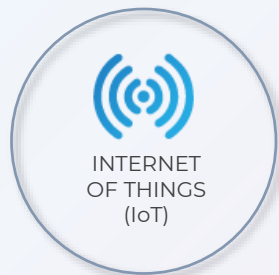
BIG DATA



AI is the ability for machines to simulate intelligent human behavior. Dependent on both algorithms and data, it can interpret information to identify patterns. Some of the ways in which Hospitality will use this technology includes making recommendations for activities, restaurants, and the best time to book hotels. The goal is to behave in a similar way to a human.

Examples:

- Obtaining an Optimal RevPar
- Chatbots for Regularly Asked Guest Questions
- Automation of Job Duties – Robotic Process Automation (RPA)



The IoT is a constellation of connected devices with embedded sensors providing real-time information to an application layer. IoT describes the enhanced connectivity we now experience with everyday devices and appliances that would not typically boast such capabilities. From personalized guest experiences to a reduced ecological footprint there are many reasons why hospitality venues would consider using IoT technology.

Examples:

- Smart Safety Devices for Staff Members
- In-Room Climate Control, Lighting, Drapes, etc.
- Leveraging Data From Smart Mobile Devices (watches, phones, tablets, etc.)



Big data is rapidly increasing amounts of data, generated by multiple sources, in many formats. To make actionable insights, analysis of the data is necessary. Hospitality venues can capitalize on the information about guests to drive business decisions, make the guest experience memorable, and improve the working conditions for associates. Both IoT and AI depend on big data to function at optimal levels.

Examples:

- Centralized Guest Profiles
- Purchasing and Invoicing Records
- Hotel Reservation Systems