# HOTELSCHOOL THE HAGUE

*Hospitality Research*

# Hospitality Research Centre

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# *Innovation, personalisation and market forces:*

HTH Outlook on hospitality 2020

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# Innovation, personalisation and market forces: HTH Outlook on hospitality 2020

# Abstract

On March 28-29, 2019, Hotelschool The Hague organised a research symposium on *Hospitable futures: Preparing talents and understanding the technology to create meaningful encounters*. In line with the school's research vision, the symposium was meant to bridge the gap between academic research and the insights and concerns of practitioners. At the symposium, a panel composed of Dirk Bakker (Chief Executive Officer for Colliers in the Netherlands), Veerle Donders (Concept and Brand Director at Zoku), Bruce Tracey (Cornell University) and Jeroen Oskam (Hotelschool The Hague) discussed the future outlook for the hospitality industry from this combined practitioner and academic perspective.

The following statements, submitted by Hotelschool The Hague researchers and external experts, were discussed by the panel:

1. What does authentic, personalized hospitality look like in a high-tech environment?
2. The GAFAM (Google, Apple, Facebook, Amazon, Microsoft) five, not the leading hotel brands, are the real competitive threat.
3. Technology will supersede human interaction, redefining our industry as a negligible employer.
4. In 2030 the lodging industry counts only five, predominantly Chinese, global brands.
5. Our industry must be a forerunner of sustainability to maintain legitimacy in major markets.

General conclusions of the debate were that the panel saw a future that combines human interaction and customer centricity with facilitating technologies. Hospitality expertise is therefore not likely to be replaced by technology. Consolidation and globalisation of the market will continue alongside a presence of local innovative brands with specific market intelligence. Sustainable policies have become indispensable, not only as an ethical principle but as a financing requirement.

# Introduction

Hotelschool The Hague envisions the future of the hospitality profession as determined by continuous disruptions, originating in new technologies, but also in the globalising scale of the hotel industry and tourism. Sustainability, in the use of scarce resources as well as in the sociocultural footprint of tourism, becomes a key principle in the adjustment to these changes. This has profound implications for the skillset required for our students once they enter the labour market. Our graduates will be expected to be able to anticipate and lead these change processes, thus prioritising strategic insight and foresight over a stable set of technical skills.

The Research Centre serves as an antenna for the school to detect those developments in the industry and its environment. At the same time, it seeks to contribute new insights to professionals; whereas in the past research about hospitality and tourism would be conducted in business environments, governmental studies, think tanks etc., today hotel schools and universities have the ambition to assume that role [1]. Research thus becomes increasingly important for hotel schools and their students, not just restricted to an academic context but precisely as a preparation for operating in that volatile future [2].

On March 28-29, 2019, Hotelschool The Hague organised a research symposium on *Hospitable futures: Preparing talents and understanding the technology to create meaningful encounters*. In line with the school's research vision, the symposium was meant to bridge the gap between academic research and the insights and concerns of practitioners. After an industry keynote on *Technology and Consumer Trends Shaping the Future of Hospitality* by Dirk Bakker (Chief Executive Officer for Colliers in the Netherlands), a panel composed of Dirk Bakker, Veerle Donders (Concept and Brand Director at Zoku), Bruce Tracey (Cornell University) and Jeroen Oskam (Hotelschool The Hague) discussed the future outlook for the hospitality industry from this combined practitioner and academic perspective.

Prior to the debate, Hotelschool The Hague researchers and external experts were invited to submit topics. These topics were elaborated to formulate discussion statements, which were finally ranked by the panel members. The debate was structured around the following five questions and statements:

1. What does authentic, personalized hospitality look like in a high-tech environment?
2. The GAFAM (Google, Apple, Facebook, Amazon, Microsoft) five, not the leading hotel brands, are the real competitive threat.
3. Technology will supersede human interaction, redefining our industry as a negligible employer.
4. In 2030 the lodging industry counts only five, predominantly Chinese, global brands.

5. Our industry must be a forerunner of sustainability to maintain legitimacy in major markets.

This paper is a result of the outcomes of the panel debate. We are not fortune tellers; rather than this paper being a final and definite prediction, we see this as a discussion paper. We hope it will contribute to setting the agenda for a joint reflection, by practitioners and researchers, about the key issues that the hospitality industry will face in the short and mid-term future.

# 1 What does authentic personalised hospitality look like in a high-tech environment?

'Authenticity´ seems to be a straightforward concept; however, it is a widely debated construct with multiple interpretations [3-9]. In the first place, it means 'real´ as opposed to 'false´. The word 'personalised' is often used in combination with the word authentic, as it results from a genuine interest in the guest's needs rather than a 'one-size-fits-all' approach. Intuitively, the contact with a 'real human´ may be experienced as more authentic than an automated service encounter; at the same time, technology may be used to customise the service encounter and, therefore, to enhance the sensation of 'authenticity´. Technology has therefore shown to be a challenger of personalisation as well as a facilitator: it has been able to replace human actors in hospitality businesses, perhaps most visibly in the checking-in process. Arriving in a hotel or a host's home by checking-in online or with automated checking-in depersonalises the guest experience. However, some players in the field have upgraded the role of the human actor in this process to that of host who instead of the transactional activity concentrates on a more personalised attention to the guest, 'reading' her or his behaviours and needs and thus providing a personalised welcome.

Technology enables service providers to collect larger data sets, resulting in the emergence of the concept of 'big data'. Big data analysis is assumed to result in more reliable analyses that can inform and improve decision making. At the business level, revenue management systems, customer relationship management systems and human resource management information systems are all examples of technological applications that have served to make decision making more facts based.

A second important distinction has to do with who is supposed to be authentic. If it is the Other, authenticity requires visitors to get to see a destination as it really is, without staged enactments. This implies: no 'disneyfication´ of destinations, no scripted operation procedures in the contact between guest and hospitality provider [10]. But nowadays,

authenticity is more and more used to refer to the Self, in the sense of 'existential authenticity´ of the traveller: being able to do whatever he or she feels like, without the compelling scripts of tourist behaviour. Basically, this is what Airbnb campaigns refer to when they speak about 'Living like a local' [11]. Paradoxically, this implies an individual, almost antisocial experience rather than a contact with hospitality professionals or other people.

A high-tech environment in today's world will be characterised by applications such as voice recognition and control of devices —through Siri, Alexa or Google Assistant—, predictive Artificial Intelligence, Virtual or Augmented Reality and Data Driven Feedback Loops. In a hospitality environment, this may manifest itself as the service provider able to anticipate guests' behaviour and wishes, adjusting its processes to actually observed guests' reactions, and offering an enhanced experience through intuitive or real-life interfaces.

To what extent is such a science-fiction hotel environment more or less hospitable? The popular view is that we live in a society dominated by technology and rapid technological developments. The often used rhetoric of 'faster and faster' and 'more and more' is evidence of this. However, it can be questioned whether our perception of this 'rapid' technological developments are different from perceptions of those 150 years ago. The days of what is called the first industrial revolution (industrialisation, start of mass production) were also perceived as 'rapid' technological developments. Therefore, what looks as 'rapid' technological developments today, may look slow 100 years from now.

Many technological innovations do not respond to an actual or specific market demand; as Steve Jobs famously declared, "A lot of times, people don't know what they want until you show it to them" [12]. These supply driven innovation processes may cause the feeling of being overwhelmed by technology, which explains the perception of a tension between human contact and technology, or 'high tech – high touch' [13-15]. Only when customer centricity becomes part of the proposition, technology-based companies may succeed in building emotional relationships with their clients [16-18].

We could therefore say that technological innovations apparently challenge the human aspects of hospitality, but that they can also enhance the personalisation of experiences. This requires a customer centricity that does not necessarily accompany the introduction of these innovations.

- 'Authenticity' is not an unequivocal construct; it can refer to the visitor's contact with a local environment, but also to the guest's experience in line with his or her own aspirations and desires.
- We observe that technological innovations apparently challenge the human aspects of hospitality, but that they hold the potential to enhance the personalisation of experiences. In our view this requires a customer centricity *mindset* and *attitude*

first, technological innovations should be facilitating not dominating in order to prevent that personalisation becomes superficial and mechanistic.
- Their introduction, therefore, must respond to a guest demand.

# 2 The GAFAM (Google, Apple, Facebook, Amazon, Microsoft) five, not the leading hotel brands, are the real competitive threat.

The big five tech companies or media houses, known as the GAFAM [19, 20] or the Scary Five [21], have developed an oligopolistic market power in internet distribution that may strongly condition the future of the hotel industry and travel. Online Travel Agent Expedia was created in 1996 as a division of Microsoft; more recently, Amazon unsuccessfully launched Amazon Destinations [22]. Google has cautiously tested the waters of travel and hotel distribution, apparently in an attempt not to antagonise its biggest advertisers; after Google Flights, the search engine now seems to have restarted Google Hotel Search, including an apartment rental offer that enters in competition with Airbnb [23, 24].

A first perspective concurs with the statement; in this view, a development of the internet becoming less open and more mobile would lead to available online information becoming more device specific. In other words, internet platforms would in this scenario compete for the 'limited shelf space of a phone screen' [21], which would put an end to the current symbiotic relation between Google and advertisers as Expedia and Booking. Despite the short-term advantage of lower commission rates, a further concentration of market power in online intermediaries will probably be bad news for hotel companies, leading to a loss of brand value and commoditization.

Nevertheless, the experience with human behaviour and customer contact is stronger in hospitality companies than in the technology platforms. The panel argued that this expertise will create a competitive advantage, as technological solutions can replace certain operational or transactional roles of humans, but not the emotional connection. As Bruce Tracey observed, "I can Google just as well as the receptionist, so if I need a place to go outside the hotel, that's where I want to go. I don't need that person; but there are times when I do. I think that's one of the questions you have to think about: when is technology appropriate and when can we supersede that with the human touch?". In the case of Zoku, Veerle Donders added, "it should really enable our sidekicks, in our case, our staff, to get the processes out of the way. So for example we have this check-in kiosk with three easy steps to check in. When you get nervous about 'is my room ready and did my reservation go through in time', to get it out of the way. Then you actually have a very nice human interaction without all that stress in your mind."

But even if the GAFAM will not become a competitive threat, the tech communication platforms may be a threat for hotel companies because of their impact on other business processes, such as real estate, furniture rentals and mainly the control and use of big data. Data driven management enables personalisation and therefore also drives specialisation in hospitality management: the overall responsibility of the General Manager for all commercial activities in the hotel is becoming replaced with specialised management for Rooms and Food and Beverage. These activities can be outsourced, especially in the case of F&B, and even may be subject to separate ownership transactions.

The future implementation of AI and predictive behaviour will mean a big leap for personalised experiences. The panel notes that implementations of AI in Human Resources Management [25] are already well under way in our industry. Bruce Tracey remarks: "There's some really cool technology that is advancing on the employee assessment side or pre-hire. I can look at a lot of really cool data and then be able to predict not only if you're going to be a successful hire, but what your training needs are, what kind of performance feedback you will be responsive to, the kind of rewards." Technological solutions should not be feared by students, for they will help improve finding a fit between organisation and employee: "We are horrible at things like interviewing, they are so lousy as a prediction and yet we put so much confidence in our ability to judge other people's character".

A "show stopper" in the use of data are privacy laws; they may slow down the progressive introduction of predictive behaviour. Different anecdotes on the accuracy of predictions and profiling by platforms as Facebook and Linkedin show where this evolution will go, especially if they can build on anonymous footprints.

In short, the panel finds that while the hospitality industry will become increasingly data driven, and while technology will influence the interaction between guest and service provider, these innovations will not obviate the expertise on customer centricity and human connection that is present in the hospitality industry. Joining forces with the Tech companies may be an interesting outcome to explore, as their incursions into hospitality are still characterised by a traditional approach; "I still don't think they are fully aware of how to turn those data into something workable in the end" (Veerle Donders).

*"If you talk to the tech companies, and you actually asked him about the guest experience and what they're thinking in terms of concepts, they are not as far as I would think they were; they are very much tech focused and they go at it taking the traditional route, which is first real estate, getting an architect to build a building, and then they try to shove in the concept in the end which leaves no room for people to actually make a customer centric concept." (Veerle Donders)*

- The 5 big tech communication platforms —Google, Apple, Facebook, Amazon, Microsoft— are likely to achieve a market power that will be a threat to traditional hotel companies as well as for OTAs.
- This market power is based on their dominance and control of data as well as their data analysis expertise. Nevertheless, their lack of specific hospitality expertise opens the door for a cooperation of tech companies and hospitality businesses or professionals.

# 3  Technology will supersede human interaction, redefining our industry as a negligible employer.

The third statement focuses on the potential and the effects of automation in the workplace, rather than on the external competitive effects for our business. A report by McKinsey has suggested that few professions can be fully automated, but that most professions can be partly automated with a noticeable impact on productivity. Stakeholder interface functions have a limited automation potential, while data collection and processing, as well as predictable physical tasks are more likely to be taken out of human hands.

> When machines can take on workplace activities, the nature of work will change. Today, only about 10 percent or less of the average human worker's time at work is spent using capabilities such as emotional reasoning and creativity, which many people would describe as being a core part of the human experience. The capability most used is recognizing known patterns, followed by natural language generation (for example, speaking), sensory perception, information retrieval, and natural language understanding […]. By allowing machines to handle more mundane activities, automation could free up women and men to use their creative and other talents more than they do now. [26] (pp. 37-38)

Some examples of robotised hotels have drawn mediatic attention; as they combine the performance of predictable physical tasks and interface functions, it can be questioned to what extent their use is practical rather than geared towards that mediatic attention and branding. But there are moments when, for instance in housekeeping or room service, hotels guests would prefer to see that interface function neutralised. We will not need to tip porters; Veerle Donders gives the following example: "If I order room service it's because I don't want to see anybody, I want to be in my pyjamas, I'm going to be on the bed and just watch TV and not be ashamed to just, you know, get my burger in. Maybe I don't want to see anybody."

In line with this, Jeroen Oskam indicates that the statement has three underlying assumptions: "that hotel guests appreciate this type of interactions, that machines are not

capable of empathy and that all humans are." As a *Harvard Business Review* article argued some time ago, sometimes 'your customers don't want to talk to you'. A frictionless customer centric service does not so much depend on the amount of human interaction, but on offering an easy way for customers to solve their issues. In other words, the fact that an interface or channel is human or automated is not important, as long as the transaction can be completed without channel changes: e.g. asking a customer at the desk to call customer service, or customer service redirecting people to a website [27].

The second part of the statement refers to the impact of automation on the labour force. The panel agreed with the McKinsey report [26] that automation, also in our industry, will result in a shift in the nature of work, specifically away from transactional aspects to the guest experience. What will that mean for the labour market and for wages? They may initially increase rather than decrease. Bruce Tracey indicates —with the example of Grubhub deliveries' impact on McDonalds— that there may be a pain process in which growing demand causes such increase, despite a job loss in the company's front of house. In the longer term, though, the shift in the nature of work will create more rewarding jobs with people not limited to a narrowly defined set of responsibilities. This may lead to better paid jobs, even though their number may fall, causing labour costs to remain stable.

*"The loyalty program has to be very specific to you, not to you and a bunch of people like you."* (Bruce Tracey)

This shift should then lead to a better customer experience, the economic value of which is obtained through higher guest reviews, e.g. on Booking.com. In general, trade press articles support the idea that a balanced offer of human interaction and technology support enhances the guest experience [28-31]. According to the panel, this must generate an ongoing contact with guests, resulting in the first place in higher loyalty, provided that these loyalty programmes are really personalised; and in the second place in increased innovation awareness, as it enables companies to "stay ahead of the curve" by growing with their customers and staying relevant in the light of evolving consumer trends.

- While predictable physical tasks, as well as data collection and analysis may be automated, humans will probably still be better at the creative and communicative elements of hospitality jobs.
- Robotisation may therefore lead to more rewarding jobs.
- Automation will contribute to personalisation. If technological innovations are introduced to facilitate customer centricity, they will result in a better guest

experience, satisfaction and involvement, the economic value of which resides in increased eWOM.[1]

# 4 In 2030 the lodging industry counts only five, predominantly Chinese, global brands.

This statement contains a double prediction: in the first place, an extreme level of consolidation in the hotel industry, and in the second place an increased role of Chinese companies. The level of consolidation could occur as the consequence of a 'winner-takes-all' competition between two-sided platforms [21, 32, 33]; this would of course require the (GAFAM) media houses to develop an oligopolistic market position as predicted in the second statement. Jeroen Oskam does not see a similar potential for the irruption of Chinese platforms: "There seems to be a great wall between two-sided platforms that triumph elsewhere —Facebook, Airbnb— and more controlled networks in China. Not only economic, but also political developments will therefore determine their brand expansion."

The other panel members, however, nuance that big players in the market lack the agility of smaller brands and companies operating locally. These smaller company can detect and seize local entrepreneurial opportunities; even though their innovations and concepts can be copied, those emulations by bigger companies miss the authenticity or the 'soul' of the concept, as Veerle Donders argues, recalling the comparison of a mass produced innovation as the Moxy concept, in Dirk Bakker's keynote, with the better prepared and more consistent concepts of, for instance, Citizen M or her own Zoku. Speed and volume determine that authenticity, according to Dirk Bakker: "There's only one Zoku, and Hilton opens one new hotel a day in the world". Not even with their six months' development programmes can those big companies fill the gap between the current five percent compound annual growth rate in tourist arrivals and a 2.1 percent increase in hotel rooms.

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[1] Electronic Word-of-Mouth, e.g. guest reviews and recommendations.

This means that, at least for now, providing sufficient beds at a certain price is the decisive factor. That may change in the future; Dirk Bakker gives the example of Accor having taken a 30 percent stake in 25 Hours, which is a beautiful concept in his eyes: "In France there are quite a few Novotels where nobody wants to stay anymore, where owners are not happy with their hotels because Accor has not put any money in development. [...] I would imagine that Accor would be pushing these owners to step into 25 Hours to create a much better revenue stream and a much better experience."

> *"If you see that compound annual growth rate of close to 5% of increase in tourist arrivals, where the amount of rooms being added in the world is 2.1%, then that delta gap ensures that even these six months' development programs they use provide beds against a certain price; that price point is the deciding factor." (Dirk Bakker)*

As for the second part of the statement —a market dominance of Chinese brands—, the panel agrees that that scenario is unlikely. There may be room for a limited number of brands that focus on Chinese outbound travellers; but they will hardly impact the position of the biggest hotel companies with their combined array of up to hundred different brands, from Waldorf Astoria to Doubletree, to Marriott, each of them representing a different guest experience. "80 percent of the Chinese people think that Holiday Inn is a Chinese brand" (Dirk Bakker).

The panel makes a distinction between this limited influence on hotel brands and ownership structures. Economic power drives Chinese foreign investments, which of course also benefits the growth of outbound travel: "Jin Jiang is the largest travel agent in the world, government owned; Jin Jiang needs to put their people —in order to justify their existence— in beds. That is why Chinese companies have been buying hotel groups in Europe and have been driving consolidation in the last five years, no longer" (Dirk Bakker). In 2015, Jin Jiang acquired Louvre hotels. As a result, out of the big five companies, one is now Chinese owned, although not created by the Chinese [34, 35].

Low interest rates make that capital is abundantly available. This makes hotel real estate interesting to investors worldwide. The recent sale by Anbang (Chinese insurance group) of its stake in the Amsterdam Doubletree by Hilton —because of governmental investment restrictions— also illustrates the dynamics of this market. On the short term, the panel therefore expects no material influence by Chinese owners and investors on hotel brands.

- Local companies will outperform big international firms in innovation and specific market intelligence.
- Chinese companies may become more important in hotel investments, but will not anytime soon have an important influence on hotel brands.

# 5 Our industry must be a forerunner of sustainability to maintain legitimacy in major markets.

The statement refers to ethical motivations for hotel companies to embrace sustainability as a business principle [36]. It is assumed that today's consumers are driven by similar ethical motivations, especially the millennial generation, even though this cannot be generalised as they are not a homogeneous motivational group [37]. Precisely because of sustainability becoming a hygiene factor for young companies, Zoku obtained a Green Key Gold certification although the company has never advertised it as a distinctive feature. There is more excitement among their clients, as Veerle Donders reports, about Zoku being one of the first hotel companies in the world to become a B Corporation [38, 39].

The commercial benefits of sustainable strategies remain to be proven. Jeroen Oskam recalls that a few years ago Booking.com included Green Key listings in its A/B testing [40] and eventually decided to take it off as it did not substantially influence consumer choices. Currently the company has reopened the option for hotels to upload their sustainability certificates to test their effect; which means that in a few months we will be able to verify Booking.com's findings on the commercial aspects of sustainability. However, Dirk Bakker specifies that also the business climate is shifting; real estate investments will no longer be financed if plans do not have a LEED gold certificate, thus obliging investors and construction companies to adhere to sustainable standards [41].

Finally, the panel discussed whether hotels are part of a sector and an activity that is inherently unsustainable. One of the problems of the explosive growth of air travel is that it is priced below real cost [42]. Changes in consumer behaviour —reducing travel volumes [43, 44]—, as suggested by a student in the audience, were however still deemed improbable by the panel: leisure travellers still show a desire to see the world, despite the 'flight shame' movement or phenomenon.

> *"Put very simply, the greenest hotel is always the hotel that's at a walking distance from your home" (Jeroen Oskam).*

- Contemporary generations seem to value sustainable policies of hotel companies. It remains to be seen to what extent sustainability drives consumer choices. A good

indication will be the incorporation of sustainability indicators on the Booking website.

- On the investment side, sustainable certifications are becoming indispensable.
- The unsustainability of tourism as a growing global activity is a point of concern, that however has not led to substantial changes in travel behaviour.

# Conclusion

During the *Hospitable* Futures symposium, a mixed practitioner-academic panel explored the immediate future of the hospitality industry. Human connection and guest centricity were found to be key features of the hospitality profession, today and even more so in the future: technological innovations as AI predicting employee and guest behaviour, voice controlled devices and augmented reality, may support the hospitable interaction, but cannot replace it. The nature of work in the hospitality sector may shift from transaction to interaction with the guest.

Internet platforms will continue to expand their influence on the hospitality industry. They are not considered a competitive threat for hospitality companies as they lack expertise on interacting with guests. Supply driven innovation may cause a sensation of consumers becoming overwhelmed with technology. Tech companies may benefit from the expertise developed in hospitality to put the customer central in their propositions. A balanced offer of human connection supported by technological innovations is in general found to be an effective approach to enhancing the guests' experience.

Despite business consolidation in a fast growing market, small local firms will have the advantage of close customer contact and agility. They will therefore continue to co-exist with large multinational companies. Also global shifts in economic power will impact the future of the hospitality industry. Emerging economies that generate increasing volumes of outbound travel —especially China— will play an increasingly important role as investors. The influence of these investors on hotel brands will probably remain limited.

Sustainability has become an ethical principle and, to a certain degree, a hygiene factor for new hotel companies. Certain segments of hotel guests are enthused by companies that are forerunners in this development. Increasing travel volumes are a threat to sustainability, that will need to be addressed by true pricing of air travel or by changes in consumer behaviour. Increasing visitor numbers and "overtourism" will probably be central topics in the debate for hospitality professionals for the decade to come.

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