



CUSTOMER EXPERIENCE

The state of customer experience in hospitality

In the hospitality industry, where “experience is the product,” the ability to deliver excellent customer experiences is the only path to overall business success. If you’re a leader at a hotel, casino, airline, restaurant, car rental agency or other hospitality company, you intuitively know what’s at stake.

What’s not so readily apparent is how guests and other hospitality customers are constantly changing their definition of what constitutes an excellent experience. Equally elusive is to know precisely what your company can do to ensure it changes fast enough to keep pace with changing customer expectations.

The proper strategy will inevitably involve how you treat your customers in the physical world as well as the digital world. Every successful hospitality company has a good understanding of how to deliver excellent customer service in the physical world. But each year, the digital world takes on more importance. And now the two are intertwined.

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What do hospitality customers expect?

What consumers expect from hotels, casinos, airlines, restaurants, and other hospitality companies has changed at a fast pace. Each year guests and other hospitality customers want more personalized, higher quality experiences that can be procured more easily. But to meet these ever-increasing demands, hospitality companies can't focus solely on their own company or even hospitality industry overall. Instead, they have to study and understand how customer experiences are changing in business more generally.

For most hospitality and travel consumers, their perception of what constitutes personalized and high-quality experience is defined by their experiences with brands outside of the industry. As noted in Deloitte's 2017 travel and hospitality industry outlook, other than frequent business travels, most people only travel a few times per year. "Consequently, their exposure to travel brands is relatively limited," the report says. "Everyday brands such as Amazon, Starbucks, and Seamless, however, showcase their innovation and services to their consumers often—sometimes daily. Many of these brands are leading on the customer experience front and setting the bar high for consumers' brand expectations."¹

Here are some prevailing consumer expectations with direct impact on the Hospitality industry:

Self-service—Consumers increasingly prefer self-service over getting help from a company representative. According to a 2017 customer service trend report by Forrester Research, "Customers of all ages are moving away from using the phone to using self-service—web and mobile self-service, communities, virtual agents, automated chat dialogs, or chatbots—as a first point of contact with a company." Each digital self-service channel reported growth while phone volume reported a 12% decline.²

This helps explain the popularity of airline and hotel self-service check-in and other recent developments in the industry.

Fast service—Consumers don't want to wait. It's a changing expectation driven in part by the proliferation of mobile devices in recent years, and the Internet in preceding years. "Mobile has produced a permanent sense of immediacy," says travel industry advisor Henry Harteveltdt, a former Forrester Research analyst. "It's changing forever how our guests interact with us and how they expect us to interact with them."³

Intelligent service—Consumers expect more sophisticated service. This, too, is being driven by advances in technology and the service guests receive from companies in other industries. Devices today are smarter and enable more sophisticated interactions between hotel staff and guests. Even bed sheets and towels are more intelligent now. In many hotel properties, they are being equipped with radio frequency identification devices (RFID) to help hotel management know better when a guest needs service.

Walt Disney Company™, an undisputed leader and innovator in hospitality service, offers its guest MagicBands wristbands and cards, which are secure devices personalized to the choices a guest makes in preparing for their vacation. They can be used to unlock a hotel room, help the guest gain access to a ride at theme park, and charge food, among other features.⁴

Consistent service—Consumers expect companies to deliver reliable service and communicate consistently at all touch points in the customer journey. With each visit to a property, a guest expects the same level of service, and familiar features and processes. Companies like Starbucks™ excel at maintaining consistency in both quality and the interactions with its customers. When a Starbucks customer interacts with a hospitality company, they expect the same. With each contact, consumers also expect the business to know the history of a particular issue or the preferences they've stated before.

In the mind of hospitality customers, each of these service characteristics will produce a composite impression of value. Delivering greater value in customer experience is associated with greater profit. According to Forrester Research, a one-point improvement in the customer experience score for upscale hotels produces \$6.52 per customer in additional revenue.⁵ That can add up to a lot of profit for hospitality companies that number their customers in millions or tens of millions per year.

The context for these expectations

Hotel guests and other hospitality customers clearly are demanding enriched experiences. Fortunately, the industry is in a sustained period of growth so there's money to invest in new processes and technologies necessary to meeting new these new demands. According to a 2017 report from the World Travel and Tourism Council (WTTC), the industry's direct contribution to the global gross domestic product grew by 3.1% in 2016 compared to the overall economic growth globally of 2.5%. It was the sixth consecutive year travel and tourism outperformed the global economy. In raw numbers, the industry directly contributed US \$2.3 trillion and 109 million jobs to the worldwide economy. The WTTC report projects that the industry will grow at an average 3.9% for the next ten years and in 2027 will support more than 380 million jobs, one in nine of all jobs worldwide.⁶

Despite this positive financial outlook, this is no time for hospitality companies to assume that pursuing the same strategy will enable them to remain competitive. In its 2017 travel and hospitality industry outlook report, Deloitte acknowledged the growth trends, but added that winners in travel are most likely to be companies that are most responsive to disruptive changes in the industry, including shifts in the global economy, game-changing innovation, geopolitical turmoil, natural disasters, pandemics, and rising consumer demands.⁷

Political turmoil, natural disasters, and pandemics clearly demand a strategic response by hospitality companies. But changes to the industry caused by technological innovation and related changes in consumer behavior deserve their own distinct response. By understanding these changes and responding more effectively than their peers, hospitality companies can create significant new competitive advantage.

Here are some of the top industry trends that can be traced to the interrelationship of technological innovation and ensuing changes in consumer behavior.

Hospitality consumers are increasingly interacting

online—More than 148 million travel bookings are made on the Internet each year. That's 57% of all bookings worldwide.⁸

Mobile devices are popular, but so are desktops—Research indicates that even though smartphones play an increasingly prominent role in bookings, desktop visitors to a hospitality website are more likely to convert. For many it's a matter of trust. A 2016 study by EyeforTravel found that security risk and performance risk are critical factors for consumers considering making a travel booking on a mobile device. For example, the study reported that for flight bookings in the UK, 51% were made using a desktop computer, 23% using a tablet browser or app, and 11.7% for a smartphone app or browsers. The study concluded that many people started their research using a mobile device and then switched to a desktop to make the purchase. The report predicts that over time an increasing percentage of travel purchases will, in fact, be made using a smartphone.⁹

Online reviews matter—For hospitality customers using a travel booking site, 81% consider reviews to be important in their decision making and 49% of travel booking site users won't book a room without first seeing a review.¹⁰ According to an article on CMO.com, 95% of leisure travelers read at least seven reviews before booking their holidays.¹¹

Hospitality brands still get a majority of online bookings

Hospitality brand websites garner 65.5% of all online bookings. Merchant websites like Expedia/Hotels.com®, Travelocity®, and Orbitz™ get 19.5%. Opaque websites where customers make a purchase without knowing the brand get 11.3% of online purchases.¹²

Private accommodations are redefining what a hotel is

Airbnb™ ranked as the most visited accommodation website in Q4 2016, receiving nearly 88 million visits, up 42% from Q4 2015.¹³ Research by Morgan Stanley indicates that Airbnb is more of a threat to the traditional hotel industry than previously thought. The Morgan Stanley survey found that Airbnb adoption is currently at approximately 18% of travelers and that increasingly, its adoption is coming at the expense of hotels.¹⁴

Online travel agencies (OTAs) are a fact of life in

hospitality—In Europe, 75% of hotel bookings originate from OTAs. In the US, it's 52%.¹⁵ A few major OTAs dominate, as illustrated by a 2016 survey of more than 2,000 European hoteliers which showed that Expedia, Priceline™ and HRS™ controlled 92% of all rooms sold through OTAs and one out of four rooms sold in the region overall.¹⁶

The industry's relationship with OTAs is complicated. An OTA's commission to sell a hotel room usually is in the double digits and smaller players in the industry who lack clout often end up paying more than 20%.¹⁷ But OTAs are more than just a cost for traditional hospitality companies. They are an important marketing channel, too. Catarina Randow, vice president of the Scandinavian chain First Hotels, expressed views held by many in the industry. "[OTAs are] a valuable channel," she said. "If you'd asked me two years ago, I'd have given you a different answer. I think we are together with them more than anything...I don't mind if the guest comes through the OTA the first time. The acquisition costs are bearable in that respect but, moving forward, it makes sense if the guest books through our own channel the second or third time. That's our view." She notes that First Hotels is using customer relationship management (CRM) solutions to increase its own direct bookings.¹⁸

The EyeforTravel report also found that OTAs have higher conversion rates on mobile platforms than traditional suppliers. Author of the report, Alex Hadwick, credits this to the current capability of OTAs to provide a better digital experience. "Travel consumers regularly cite convenience, price, and quality as their top considerations and with the OTAs they are able to meet these requirements through the wide product choice, ease of comparison, price transparency, and the simplicity of the purchase process," he said.¹⁹

Tech leaders are eying the industry—Apple®, Google™, Facebook®, and other major technology brands have a history of infiltrating other industries. So far, none have made a major push into the hospitality industry. But that may be only a matter of time. In September 2016, Google announced the Google Trips app, which helps consumers organize plane tickets and hotel reservations, and provides personalized recommendations based on a person's Google history. Facebook's recommendation service, launched in October 2016, is a similar move to get involved in consumers' travel planning.

Picture- and video-based social platforms are gaining strength—Deloitte notes that younger generations are increasingly using visual platforms, namely Instagram™ and Snapchat™, to create their individual brands: "Trips make excellent opportunities to generate 'likes' and 'shares,' and travel companies should make a point to create experiences worth sharing in order to capitalize on the enormous exposure these platforms provide."²⁰

TUI, the British Leisure Travel group, has adopted more use of video and is getting an excellent return. According to Jeremy Ellis, TUI marketing director, "Where we add video to the booking experience, people are three to four times more likely to complete a booking. And our digital stores have three times as much footfall. The key will be to bridge content and video to help people experience a holiday before they book. You can test drive a car, but you can't test a holiday before purchasing. We want to change that."²¹

Obstacles to delivering excellent customer experiences

Successful hospitality companies have made enormous progress in the past decade changing the experiences they deliver to customers in the both the physical and digital worlds. But each year there are new obstacles to delivering on customer expectations for self-service, fast service, intelligent service, consistent service across all channels, and an overall high value experience. The obstacles can be divided into three major categories:

Internal operations—Front of the house (property management and guest management) and back of the house operations aren't tied together well enough, so workflow is sometimes inefficient and glitches occur. These behind-the-scenes problems directly spill over to your interactions with guests and other types of customers, adversely impacting their experiences. There also is an indirect impact on customer experience when internal operational inefficiency adversely impacts the bottom line and requires more financial resources that could better spent serving the needs of guests.

Marketing operations—Hospitality companies often lack a way to seamlessly and intelligently interact with guests across all touch points. This includes not having a system that enables you to know at the time of interaction an individual guest’s preferences and what their current or recent experiences have been. In a recent report, Forrester Research quoted a chief digital and distribution officer of a global hospitality group, who said, “The two metrics that are the hardest to solve are starting on one device and visiting us on a second device within the same experience, so just trying to understand how people are interacting across devices. It’s very difficult to understand whether you visited us on multiple devices and track that as a unique item.”²²

Technology foundation—Many hospitality companies lack multi-departmental software that ties all areas of the business together to foster efficiency in internal and marketing operations. Often there isn’t a way to collect, manage, and make accessible data about individual customers. This results in interactions with individual customers that aren’t delivered efficiently and intelligently across all touch points. There isn’t a complete customer view across all channels that can be used to better plan and execute marketing strategies and deliver optimal experiences—before they book, during their stay, and after they’ve left.

There is a common theme across these obstacles: the need for better customer personalization. According to the Deloitte travel and hospitality industry report, “Most travel brands realize that making a traveler feel special and appreciated can go a long way. Ultimately, the goal is to leverage data to automate personalization and drive conversion but, so far, much is left to be desired in terms of the travel industry’s effort on the personalization front.”²³

The answer: Personalize at scale

When marketers talk about personalization today, they mean doing 1:1 marketing at a mass scale. However, there are right and wrong ways of personalizing guests’ experiences. It isn’t about merely adding “Dear John” to an email blast. Instead, personalization is about providing guests with the right information and/or offer at the right time over their preferred channel. It’s about context, convenience, and taking the customer’s point of view.

In hospitality, personalizing at scale means that personalization occurs with all guests, across all channels, and all of a brand’s properties. It’s a major focus for industry executives today. For example, attendees at a recent travel industry conference were asked what they thought would be the big game-changer in the travel industry. Data-driven personalization was ranked first by an overwhelming 78% of respondents. Other results paled by comparison: 14% for application programming interface (API)-led distribution partnerships, 5% for block chain technology, and 2% for conversational commerce.²⁴

Best practices for creating personalized experiences

To create personalization at scale, hospitality companies need an omni-channel marketing strategy. Deloitte’s 2017 industry report summarized the expectations of hospitality consumers and the stakes for companies in the industry. “Today’s hotel guests, for example, will define a brand by the quality of their experiences across a proliferation of touch points, including smartphones, desktops, wearable apps, over the phone, and on property. Brands, which make an effort to infuse elements of on demand, personalization, and authenticity into these channels will likely fare much better than brands which do not, generating more revenue by driving loyalty, positive reviews, social likes and shares, and word-of-mouth recommendations. Experience is now integral to core travel product offerings.”²⁵

Implementing an omni-channel strategy is a massive undertaking that requires support from the top down. To truly be successful, a company needs to put the following elements into place:

- C-level executive support
- Strong chief marketing officer (CMO) and chief information officer (CIO) partnership
- Customer-centric company culture
- Reorganization to incorporate digital throughout the business
- Integrated customer data and marketing technology tools

Implementing real-time, 24x7 marketing

Hospitality companies need the ability to respond to customers whenever and wherever it's convenient—even if that's at 2:00 a.m. on a Sunday. To do this, hospitality marketers need to leverage self-learning marketing automation technologies that mine customer data to respond appropriately, aid cross-selling, and serve up in-session personalized offers on a website, in a marketing email, on search engines, social media sites, and in traditional customer service contacts.

Website/e-commerce

Personalized website experiences on average produce a 20% increase in sales but when a personalized call to action (CTA) is used the conversion rate is 42% higher than with generic CTAs.²⁶ Something as simple as recognizing customers by name can improve sales.

Advanced tools are available to combine and apply customer data from all channels, track recent interactions with individual customers, and base offers on buying patterns of similarly profiled customers. Many automated systems can change offers in real-time in response to recent guest online activities.

Email

Email has come a long way from the days of “segment, batch, and send.” And email marketing still has more marketing impact than social media, in part because email usage is ubiquitous. There are 2.6 billion email users worldwide, 91% use their email daily, 77% prefer email for permission-based promotional messages, and 66% report making a purchase based on a marketing message sent via email. The number of email users is expected to grow to 2.9 billion by 2020.²⁷

The average ROI for email marketing across all industries is \$38 for every \$1 spent.²⁸ Research also shows that hospitality consumers respond favorably to emails that are personalized. When a hotel sends a personalized welcome email to a guest when they arrive, there is an 88% open rate and a 29% click through rate. This is significantly better than welcome emails sent in batches, which garner 52% open rates and 12% click through rates.²⁹

Today's email marketing is automated whenever appropriate and is highly personalized, with real-time offers generated based on current customer data—not static customer segmentation. More advanced marketing technology tools allow marketers to essentially send an email “placeholder” to a consumer's inbox that's populated with an offer just as the customer looks at it, ensuring that the offer is as relevant as possible based on up-to-the-minute online activity and data. Tracking and analyzing the effectiveness of email offers in real-time is also now possible, allowing marketers to tweak campaigns to more quickly maximize ROI.

Search engine

Search engines are the most popular area of the Internet to visit in the latter stages of travel buying, according to the EyeforTravel study. Nine out of ten travel purchasers used a search engine in the 15 sites visited before making a purchase. In the US and UK, more than 90% of people who booked a hotel room or purchased an airline ticket online used a search engine immediately before making the purchase. Travel companies are investing huge sums in search engine marketing. The report noted that Priceline spent \$2.7 billion on search engine advertising from January through September 2016, a 26% increase over the same period a year earlier.³⁰

Mobile

From more mobile-friendly websites to specific guest experience apps designed for mobile devices, the industry is responding to strong and steady growth in the use of mobile devices. Research by Google revealed that hotel mobile search queries increased 49% from 2015 to 2016.³¹

In response, some in the industry are launching innovative new apps. For example, Journy launched an app offering concierge-style service helping travelers customize their travel plans. Users answer questions about their tastes and preferences and the Journy staff creates a personalized itinerary for the trip and helps out with restaurant reservations and booking activities. With Journy, the app is free and cost of service is \$25 per each day of travel.³²

Social media

Social media is a powerful tool to generate awareness, nurture customer relationships and loyalty, and drive consumers to a brand's website. Worldwide there are 2.8 billion social media users, a number that grew by 482 million from 2015 to 2016.³³ Research shows 71% of consumers who have had a good social media service experience with a brand are likely to recommend it to others.³⁴

Social media can also play a critical role in the booking process. According to the EyeforTravel report, one fifth of travel consumers visited a social media site among the 15 sites visited before a booking. Although research has suggested that social media is most influential and utilized on travelers' purchase decisions higher up the funnel, the high prevalence of social media visits indicates that it remains a useful marketing tool right up until the purchase.³⁵

It also plays an important role in marketing. Overt social media reviews can be a powerful marketing tool. Research by Christopher Anderson at the Cornell University School of Hotel Administration revealed that simply encouraging customer reviews can boost a hotel's ratings and revenues. Anderson even found that consumers appreciate responses to negative reviews more than those to positive reviews, with ratings rising more substantially in connection with constructive responses to negative comments than simple acknowledgment of positive comments.³⁶

Hospitality companies can use social marketing technology for 24x7 social listening, monitoring, publishing, social profiling, and social scoring to identify the best way to personalize marketing offers. Many social marketing tools, when combined with a CRM platform, also give hospitality marketers the ability to integrate social data with customer profiles.

Geolocation

Geolocation has the potential to transform hospitality industry marketing and service. Voice-activated device usage jumped 130% from 2016 to 2017, according to eMarketer.³⁷ Approximately 60.5 million U.S. consumers—20% of the population—will use voice-enabled assistants monthly or more often in 2017, and the heaviest usage occurs on voice-enabled speakers powered by intelligent assistants, such as Amazon Echo™ and Google Home™.³⁸

In October 2017, Marriott announced pilot program with Alexa. According to Tony Stoeckl, global brand leader for lifestyle brands at Marriott, "As a hotel brand, we're in the experience business. This means (taking advantage of technology that can) connect our consumers to the local experience in the hotel or the neighborhood—as well as removing some of the friction of transactions in hotels. The idea is that, as consumers have become increasingly comfortable with the technology, it's now easier for a guest to ask, 'Alexa, what's a good restaurant nearby?' than to flip through a lengthy guidebook or call down to the concierge... Having Alexa in the room lets you personalize the room experience. The hotel chain is continuing to work with Amazon to ensure privacy."³⁹

According to a recent survey of hotel executives, 74% plan to implement location-based technologies within a year. In a companion survey of hotel guests, 75% of guests were willing to share personal information with hotels in exchange for tailored promotions, but 60% expressed concerns about privacy.⁴⁰

Customer service

Despite the growing preference for self-service, hospitality companies still must excel at traditional customer service interactions with guests. According to research published in eMarketer, the preferred service channel is largely a function of the type of request and the age of the person making the request. People under 35 prefer digital customer service channels like social media and mobile apps, while older people prefer the telephone or email. For billing and payment questions, and for resolving problems, phone calls are the preferred channel for the majority of all consumers.⁴¹

Modern marketing technology gives customer service representatives a complete view of the customer in real time and the same capabilities to optimize interactions to present appropriate offers and help to resolve a problem.

Mapping and designing the guest journey

To ensure a consistent experience throughout the customer journey, hospitality companies must understand how customers interact with their brand at every touch point throughout the “engage,” “nurture,” and “convert” phases. Mapping out the customer journey can help hospitality marketers identify and fix gaps and inconsistencies in a customer’s experience, and eliminate barriers to purchase.

Researchers at McKinsey & Company urge companies to take a holistic view of customer experience. They caution against aligning customer experience measurements with internal transaction-based processes. “This siloed focus on individual touch points misses the bigger—and more important—picture: the customer’s end-to-end experience,” they write. “In our research, we’ve discovered that organizations that fail to appreciate the context of (individual customer interactions) and manage the cross-functional, end-to-end experiences that shape the customer’s view of the business can prompt a downpour of negative consequences, from customer defection and dramatically higher call volumes to lost sales and lower employee morale.”⁴²

Always a leader in delivering fulfilling customer experiences, Disney is committed to using digital technology to maintain that industry leadership. Commenting prior to the 2017 Customer Experience Exchange for Travel and Hospitality, Dan Sota, vice president of digital experience for Disney Parks and Resorts, said, “At Disney, we believe in the power of leveraging digital technology to allow our guests to maximize their experience. Some things we do are practical and utilitarian: reserving a dining or FastPass experience. Some contribute to a simple and seamless vacation: pre-arrival resort check-in enabling guests to skip the front desk. And others are fun and magical: we allow guests to personalize their MagicBands with a color of choice and laser engraved name.” Soto predicts that over the next five years, there will be more virtualization and automation of customer services in hospitality and that digital interactions will more and more be smart and contextual.⁴³

The right strategy and technology are essential

In the hospitality industry, the ability to deliver personalized experiences to every guest, every time, across every channel, is a strategic imperative. It’s also a complex challenge for all the reasons we’ve outlined in this report.

Hospitality companies must deliver personalized experiences to every guest, every time, across every touch point if they hope to keep pace with changing customer expectations. To meet this challenge, hospitality companies need an executive team that understands the requirements of personalizing at scale. It will require a thoughtful, strategic approach to business processes, especially those with direct interaction with customers. It will require a strategic approach to implementing the enabling technology, too.

For hospitality companies weighing how to proceed, a recent Forrester Research report offered this advice:

“In order to avoid disrupting the business, many companies implement point solutions that incrementally improve their channels and processes without truly transforming them. While these bolt-on solutions can be valuable stepping stones, companies will never be able to compete with the CX leaders that their customers are actually comparing them with until they dramatically change their mindset and re-architect their businesses with the goal of creating seamless experiences for the customer.”⁴⁴

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