In an effort to best assess the current technology standards in the lodging industry, the HFTP Asia Research Center and HFTP Americas Research Center developed an online survey which focused on important issues such as: IT budgets, technology installation decisions, current technology projects, in-room technology installation successes and failures, and mobile technology usage. The survey was sent out to HFTP members and released via social media to garner input from all facets of the industry.

Overall, the vast majority of responses came from those holding property or regional level IT positions such as: IT manager, director of IT and property systems technology manager. In addition, most responses came from respondents working at lodging properties or hotel management companies (88.8 percent). The other responses were from individuals working at conference/convention centers, casinos and gaming facilities, and private clubs.

Look for the entire report in the Summer issue of HFTP’s The Bottomline magazine.

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This report was produced by Hospitality Financial and Technology Professionals. For more information, visit www.hftp.org or contact the HFTP Communications department at publications@hftp.org.
What are the most important technology projects for your property/company in 2015?

Using a scale from 1 to 5, with 5 most important and 1 least important.

<table>
<thead>
<tr>
<th>Technology Project</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Security/Storage</td>
<td>3.05</td>
</tr>
<tr>
<td>Payment Technology Upgrade</td>
<td>3.5</td>
</tr>
<tr>
<td>Upgrading Existing Technologies</td>
<td>3.56</td>
</tr>
<tr>
<td>Bandwidth Enhancement</td>
<td>3.77</td>
</tr>
<tr>
<td>Guest-facing Mobile Solutions</td>
<td>3.9</td>
</tr>
<tr>
<td>Cloud Technology</td>
<td>4</td>
</tr>
<tr>
<td>Electronic Distribution Strategy</td>
<td>4</td>
</tr>
<tr>
<td>In-room Entertainment</td>
<td>4.41</td>
</tr>
</tbody>
</table>

What are the most important factors considered when deciding on technology investments?

Using a scale from 1 to 5, with 5 most important and 1 least important.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compliance/Regulations</td>
<td>2%</td>
</tr>
<tr>
<td>Total Cost/Price</td>
<td>5%</td>
</tr>
<tr>
<td>Functionality/User Interface</td>
<td>5%</td>
</tr>
<tr>
<td>Company Life Cycle/Suitability</td>
<td>5%</td>
</tr>
<tr>
<td>Security/Risk Control</td>
<td>5%</td>
</tr>
<tr>
<td>Competition</td>
<td>9%</td>
</tr>
<tr>
<td>ROI/Revenue/Benefits</td>
<td>21%</td>
</tr>
<tr>
<td>Guest Needs/Expectations/Experience</td>
<td>23%</td>
</tr>
<tr>
<td>Productivity/Employee Needs</td>
<td>23%</td>
</tr>
</tbody>
</table>
What are the top 10 technologies lodging properties should be investing in during 2015?

1. Mobile Solutions (web site and app) 3.44
2. Bandwidth/HSIA (wireless and wired) 3.44
3. Connectivity (smart TV with guests’ devices) 3.58
4. CRM Solutions (feedback and integration) 3.78
5. Business Intelligence (RM, e-marketing, etc.) 3.85
6. Central Reservation System 3.89
7. Network Security (hotel and guest) 4.11
8. Big Data Analysis 4.19
9. Green Energy Management 4.59
10. Digital Transformation (going paperless) 4.59

How important are each of the following factors in determining which technology to invest in?

Using a scale from 1 to 5, with 5 most important and 1 least important.
In general, what extent do IT investments help you to achieve the following goals?

<table>
<thead>
<tr>
<th>Goal</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving guest satisfaction</td>
<td>4.19</td>
</tr>
<tr>
<td>Increasing market share</td>
<td>3.23</td>
</tr>
<tr>
<td>Increasing service quality</td>
<td>4.23</td>
</tr>
<tr>
<td>Market strengthening/re-positioning</td>
<td>3.35</td>
</tr>
<tr>
<td>Increasing revenue</td>
<td>3.54</td>
</tr>
<tr>
<td>Lowering costs</td>
<td>3.58</td>
</tr>
<tr>
<td>Easier management/maintenance</td>
<td>3.85</td>
</tr>
</tbody>
</table>

How important are each of the following factors in evaluating the success of your IT installations?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in guest satisfaction</td>
<td>4.32</td>
</tr>
<tr>
<td>Increase in revenue</td>
<td>3.68</td>
</tr>
<tr>
<td>Increase in profitability/cost savings</td>
<td>3.88</td>
</tr>
<tr>
<td>Increase employee efficiency</td>
<td>3.80</td>
</tr>
<tr>
<td>Increase employee satisfaction</td>
<td>3.48</td>
</tr>
<tr>
<td>Increase property’s market share</td>
<td>3.16</td>
</tr>
<tr>
<td>Easier maintenance</td>
<td>3.84</td>
</tr>
<tr>
<td>Better integration with other systems</td>
<td>4.00</td>
</tr>
<tr>
<td>Re-position property’s brand image</td>
<td>3.20</td>
</tr>
</tbody>
</table>

Using a scale from 1 to 5, with 5 most important and 1 least important.
### QUESTION 9

**What in-room technologies are the most important to the guest experience?**

1. **HSIA (wireless and free)**
2. **Television and Television Content**
3. **Connectivity (own devices)**
4. **Integrated Room Control (ambiance, facilities, etc.)**
5. **Guest Request Solution (orders & information)**
6. **Door Room Locks**
7. **Energy Management Solutions**
8. **Phone (VoIP)**

### QUESTION 7

**What do you think are the top in-room technologies worth investing in?**

1. **Guest Wifi/Wifi/HSIA**
2. **HDTV/TV/IPTV**
3. **Room Control/Environmental Control**
4. **Wiring/Infrastructure/Bandwidth**
5. **Integrated Entertainment Solutions/In-room Entertainment**
6. **Door Locks/RFID**
7. **VoIP Phone**
8. **Mobile**

### QUESTION 8

**What in-room technologies do you wish you hadn’t invested in/installed during the past 5 years?**

1. **Video on Demand**
2. **Wired Guest Rooms**
3. **VoIP with Screens**
4. **iPads in the Guest Rooms**
5. **iPod/iPhone Docking Stations**
Please rate how challenging the following factors are to offering in-room technologies.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT budget</td>
<td>4.12</td>
</tr>
<tr>
<td>IT staff training</td>
<td>2.53</td>
</tr>
<tr>
<td>Hotel staff training</td>
<td>3.94</td>
</tr>
<tr>
<td>Guest expectations</td>
<td>3.88</td>
</tr>
<tr>
<td>Guest preference changes</td>
<td>3.71</td>
</tr>
<tr>
<td>Return on technology investment</td>
<td>3.82</td>
</tr>
<tr>
<td>Company’s philosophy</td>
<td>2.82</td>
</tr>
<tr>
<td>Company’s strategic outlook</td>
<td>2.88</td>
</tr>
<tr>
<td>Owners’ expectations</td>
<td>3.47</td>
</tr>
<tr>
<td>Pace of technology development</td>
<td>3.94</td>
</tr>
<tr>
<td>Competitors’ offerings</td>
<td>3.44</td>
</tr>
</tbody>
</table>

Using a scale from 1 to 5, with 5 being most challenging and 1 being least challenging.

MOBILE TECHNOLOGIES

How would you rate the importance of the following technologies in creating a personalized guest experience?

<table>
<thead>
<tr>
<th>Technology</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location based services</td>
<td>3.36</td>
</tr>
<tr>
<td>BYOD/BYOC systems</td>
<td>3.42</td>
</tr>
<tr>
<td>E-mails</td>
<td>3.48</td>
</tr>
<tr>
<td>Mobile applications</td>
<td>3.80</td>
</tr>
<tr>
<td>Web site</td>
<td>4.04</td>
</tr>
</tbody>
</table>

Using a scale from 1 to 5, with 5 being most important and 1 being least important.
### How do you currently utilize mobile technologies at your property?

<table>
<thead>
<tr>
<th>Main Purposes</th>
<th>Main Technologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking/Promotion</td>
<td>Mobile Devices (tablet, smart phone)</td>
</tr>
<tr>
<td>Guest Service/Online Concierge</td>
<td>Mobile Web Site</td>
</tr>
<tr>
<td>Internal Usage (communication, maintenance)</td>
<td>Mobile Application</td>
</tr>
<tr>
<td>Productivity (express check-in &amp; -out, process optimization, etc.)</td>
<td>Connectivity Solutions</td>
</tr>
<tr>
<td>Loyalty Program</td>
<td>SIP (for communication)</td>
</tr>
<tr>
<td>Guest Survey</td>
<td>Process Optimization</td>
</tr>
<tr>
<td>Connectivity</td>
<td>RFID Room Keys</td>
</tr>
</tbody>
</table>

### Do you plan on adding mobile technology capabilities in the near future?

<table>
<thead>
<tr>
<th>Main Purposes</th>
<th>Main Technologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest Experience/Service</td>
<td>Mobile Devices (tablet, smart phone, POS system)</td>
</tr>
<tr>
<td>o Guest Tracking</td>
<td>Mobile Application</td>
</tr>
<tr>
<td>o Virtual Concierge</td>
<td></td>
</tr>
<tr>
<td>o Guest Request Follow-up</td>
<td></td>
</tr>
<tr>
<td>o Order Taking</td>
<td></td>
</tr>
<tr>
<td>o Check-in &amp; -out</td>
<td></td>
</tr>
<tr>
<td>Booking</td>
<td></td>
</tr>
<tr>
<td>Loyalty Program</td>
<td></td>
</tr>
</tbody>
</table>
**IT BUDGETING**

**Question 14**

IT budget as a percentage of revenue

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>5.06%</td>
</tr>
<tr>
<td>2015</td>
<td>4.41%</td>
</tr>
</tbody>
</table>

**Question 15**

What percentage of your IT budget is dedicated to the following items?

- **Bandwidth/Networking/Connectivity**: 56.3%
- **Property Management System**: 13.2%
- **Point of Sale System**: 7.7%
- **Payment Security/PCI Compliance**: 7.0%
- **In-room Technology**: 7.2%
- **Guest Relationship Management**: 11.2%
- **Human Resource Management System**: 0.8%
- **Revenue Management System**: 3.6%
- **Payment Security/PCI Compliance**: 7.0%

**DEMOGRAPHICS**

**Question 16**

For the budgeting questions, please indicate at which level you are reporting.

- **Corporate/Company Wide Level**
- **Regional Level**
- **Property Level**