



Hotelhero

2020 Hotel Technology Landscape Report

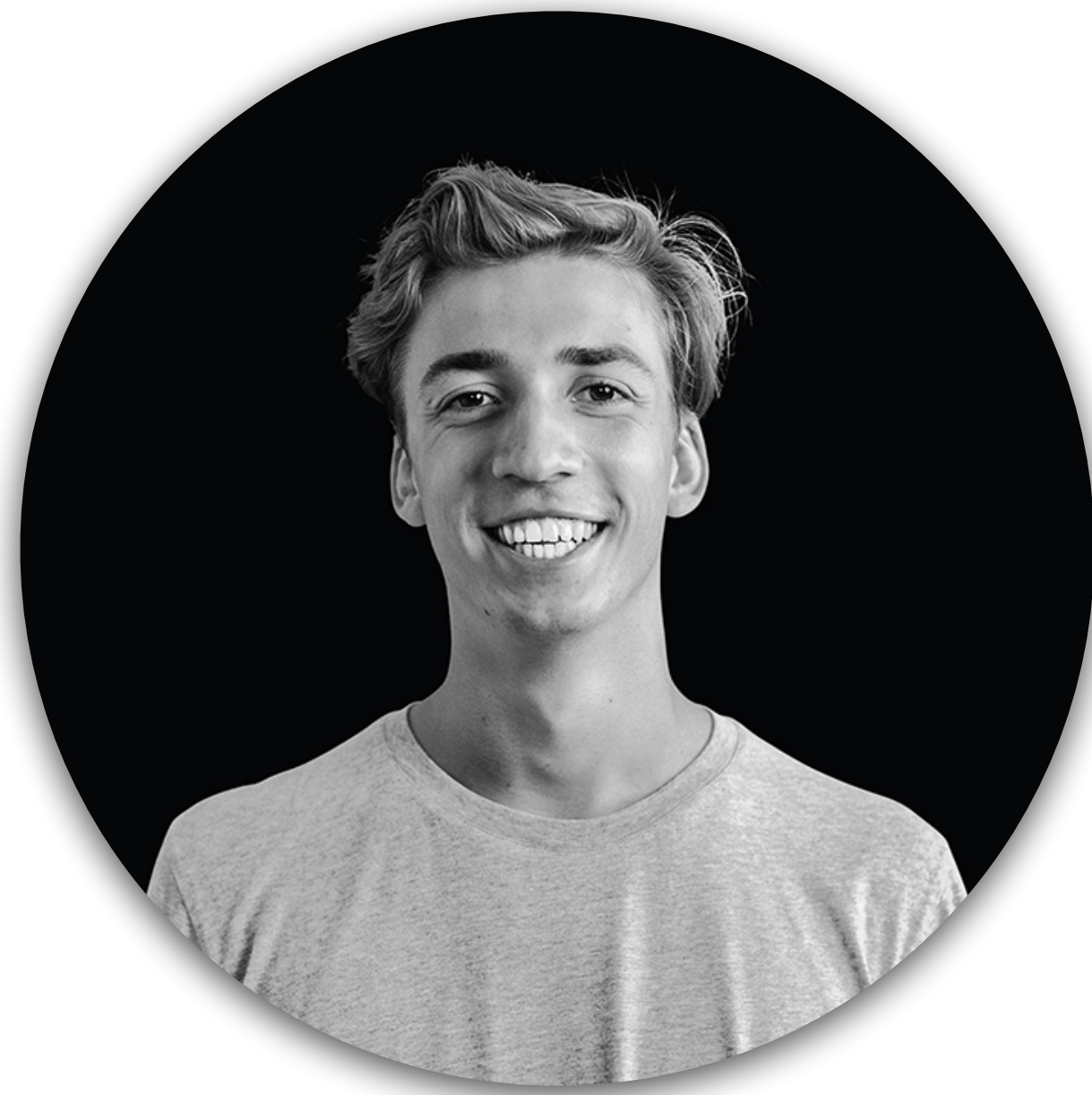
Key Insights

HFTP Hangouts

| Table of content

- About Hotelhero
- Intro to the report
- What do the hotel group executives say?
- What does the data say?
- How do these groups buy new tech?
- Best practices from 4 innovative hotel groups

| Great to meet you!

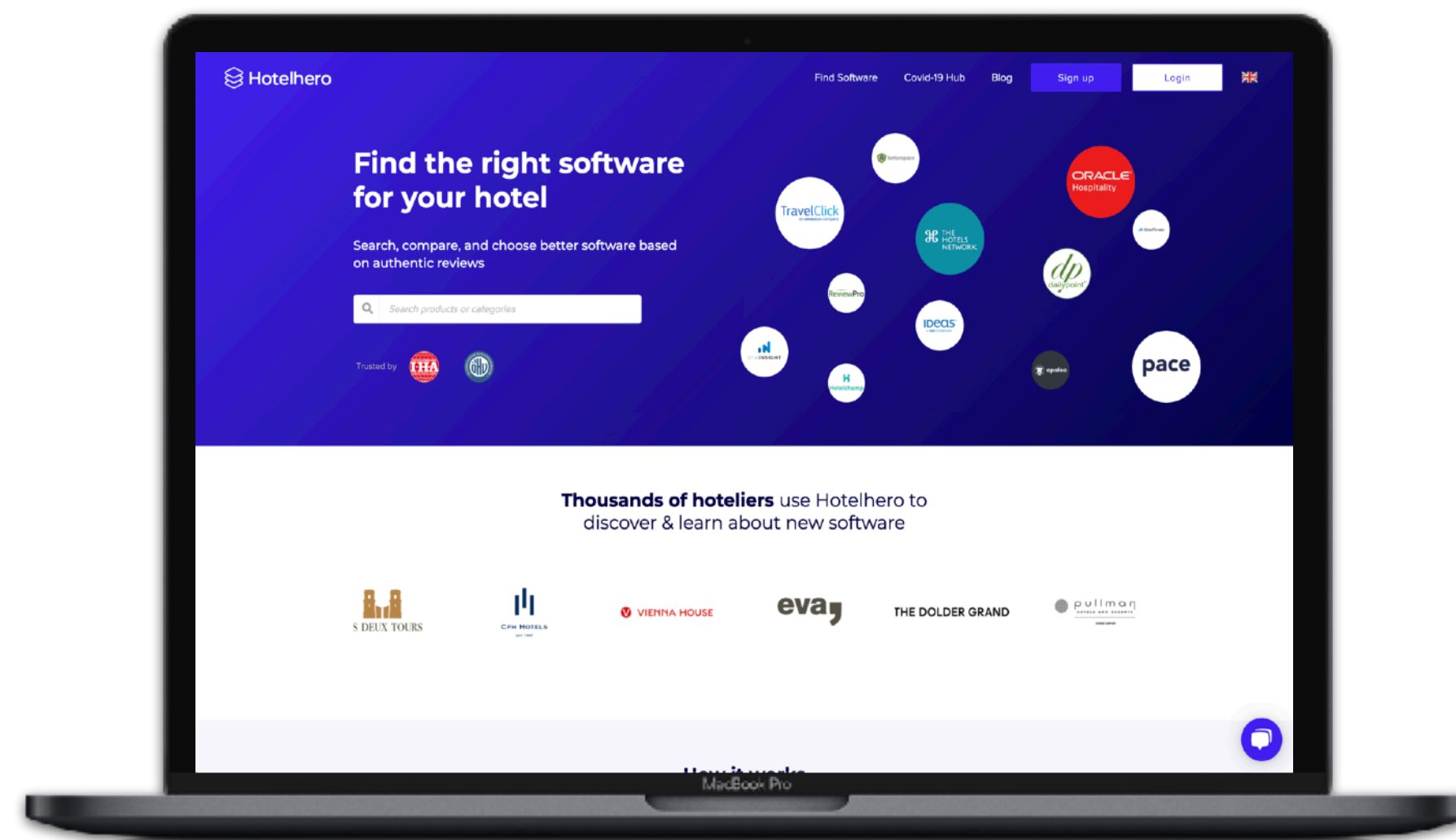


Florian Montag
Co-Founder & CEO
Hotelhero

- Bachelor of international hospitality management (École Hôtelière de Lausanne)
- Experience working for both independent and hotel chains
- Co-founded Hotelhero in 2017
- Member of the HSMA IT Expert Circle
- Member of the expert circle from the Kompetenzzentrum Tourismus des Bundes (Germany)
- Host of the Smack Hospitality Podcast

|What do we do?

Hotelhero is the European platform where hotels can discover, evaluate and manage software.



- Software marketplace & recommendation engine
- Contract & vendor management system

THE DOLDER GRAND

amiamo

DESIGN HOTELS

LINDNER
HOTELS & RESORTS

evaj

BOLD
HOTELS

BW Best Western.

PESTANA CR7
LIFESTYLE HOTELS

Hotel Sacher
WIEN

HFTP Hangouts

|The IHA Marktplatz

- In 2019 the IHA Marktplatz was launched, a special version of the Hotelhero platform with special benefits for IHA member hotels.
- It allows hotels to:
 - conduct a simple and fast search for suitable technologies
 - compare software based on authentic reviews and all relevant product information
 - receive hotel specific software recommendations based on 40k+ hotel references and integration data
 - learn all tips & tricks around hotel technology on Hotelhero's Learning Hub
 - benefit from exclusive member promotions and discounts



MARKTPLATZ

powered by  **Hotelhero**

1st annual German report

- 100'000+ data-points collected on more than 5000 independent hotels & chain hotels
- 40+ hotel brands analysed
- 15+ hotel group executives interviewed
- 30+ hotel software executives interviewed
- 200+ software providers analysed



2020 German Hotel Technology Landscape
Market Insights, Analysis & Expert Views

Presented by  Hotelhero

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| Hotel executives interviewed

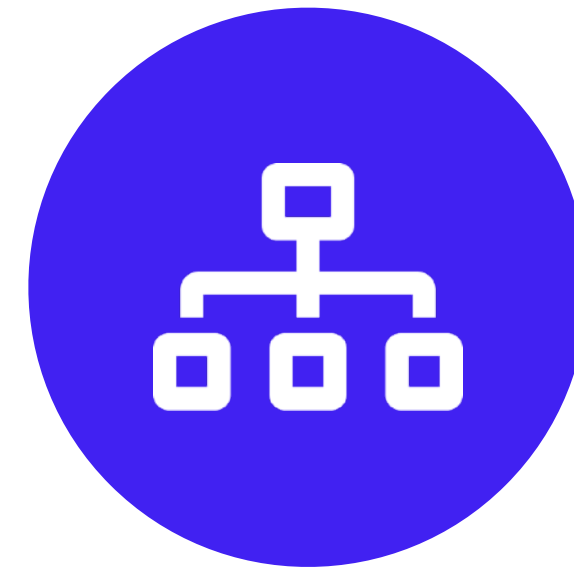
- Martin Stegner, CIO at **Novum Hospitality**
- Christian Meissner, Senior Director Distribution Products & Digital Payments at **Deutsche Hospitality**
- Gunnar von Hagen, Corporate Director of Operations & Central Project Management at **Lindner Hotels**
- Marc-Michael Hanemann, Director of Commercial Development at **25hours Hotels**
- René Halla, Director Global Distribution & Systems at **Maritim Hotels**
- Tobias Köhler, Group Director Systems & Commerce at **Ruby GmbH**
- Angelika Viebahn, Group Director & Revenue at **Althoff Hotels**
- David Henning, CEO at **Big Mama Hotels**
- Martin Stockburger, co-founder at **Konzept Hotels**
- Constantin Rehberg, digital expert/consultant (ex-CDO **Prizeotel**)
- Michael Stüring, Head of Central Services at **Atlantic hotels**
- Sebastian Lindner, Senior Revenue & Distribution Manager at **Meininger Hotels**
- Klaas-Jan Meijer, Head of eBusiness at **B&B Hotels GmbH**
- Gerd-Martin Linke, Director of Revenue & Sales at **Centro Hotels**
- Andreas Von Reitzenstein, Chief Commercial Officer at **H-Hotels.com**

What do the **executives** say?

| 3 key challenges



Mindset



**Available
Technology**



Budgets

| The hotel mindset

- Hotels don't consider themselves tech companies
- Process automation is rising throughout hotel segments
- Hotels need to develop an overall digital strategy
- What is missing?
 - Time & resources
 - Budgets
 - Education

| The platform economy

- Most see the future of hotel tech with an open-platform philosophy with REST API's
 - To allow more agility
 - To reduce time-to-market & time-to-implement
- Data standardisation & integration is still the biggest hurdle today
 - The opinions differ if they would prefer an All-in-one or best-of-breed tech-stack
 - Middleware/data warehouse could be the solution
- Breaking the status-quo is a key challenge especially for existing hotel chains
 - Many of them work with legacy solutions, which have vast functionality, but which are not set-out for a plug & play method
 - Different database structures and data standardisation is the key problem for most!
- New built have it much easier than already existing hotels

| Did COVID-19 change anything?

- Many hoped that a massive and fast-paced digital transformation across the industry.
- Reasons why this did not happen in 2020:
 - Most employee's were furloughed
 - No projectable revenues
 - Money from the state was delayed
- There will be an expected digitalisation push in 2021
 - New generation of hoteliers/investors will be more tech focused
 - Government funding will be paid out
 - Less revenue uncertainty

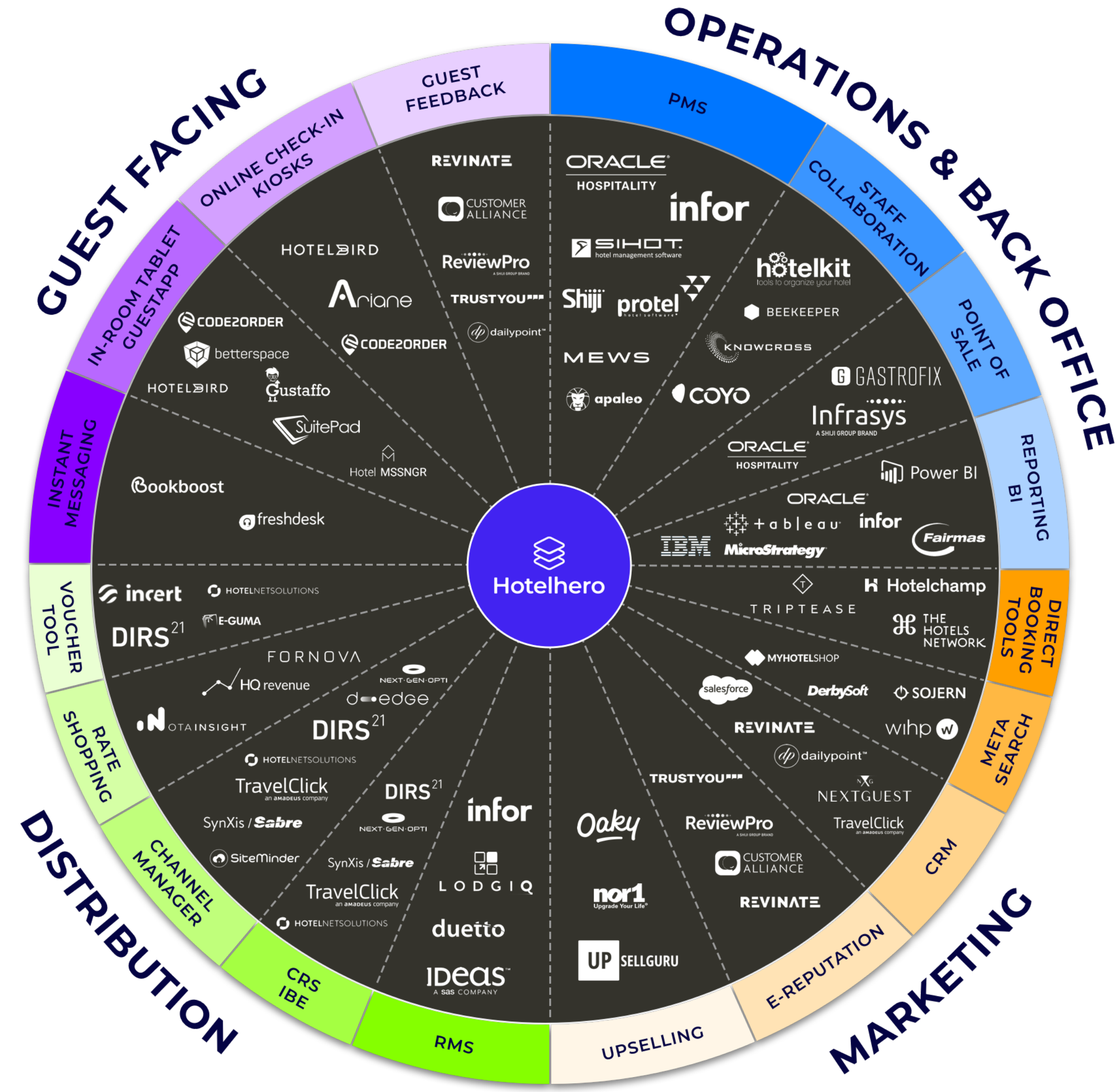
|The digital check-in/out journey

- Digitalising the customer journey is the most talked about trend in 2020
 - With a wide acceptance across segments
 - Important that the hotel infrastructure can actually handle this journey
- New hotel concepts like COSI Group, Koncept Hotels, or Big Mama hotels are benefiting from this crisis
 - Tech infrastructure and automation of most processes (near staff-less hotels) - 20/40% overhead costs
 - The long-stay segment played a role
- The details & processes are key to fully automate the digital guest journey
 - All key systems need to be fully integrated (Online payments, digital key, PMS (invoicing, check-in/out, etc.))
 - The tech/integrations are in most cases still the hindering force (A lot of these processes are still handled manually in the back-of-house)
 - For a higher adoption, you also need to adapt the processes

What does the **data** say?

The digital customer journey

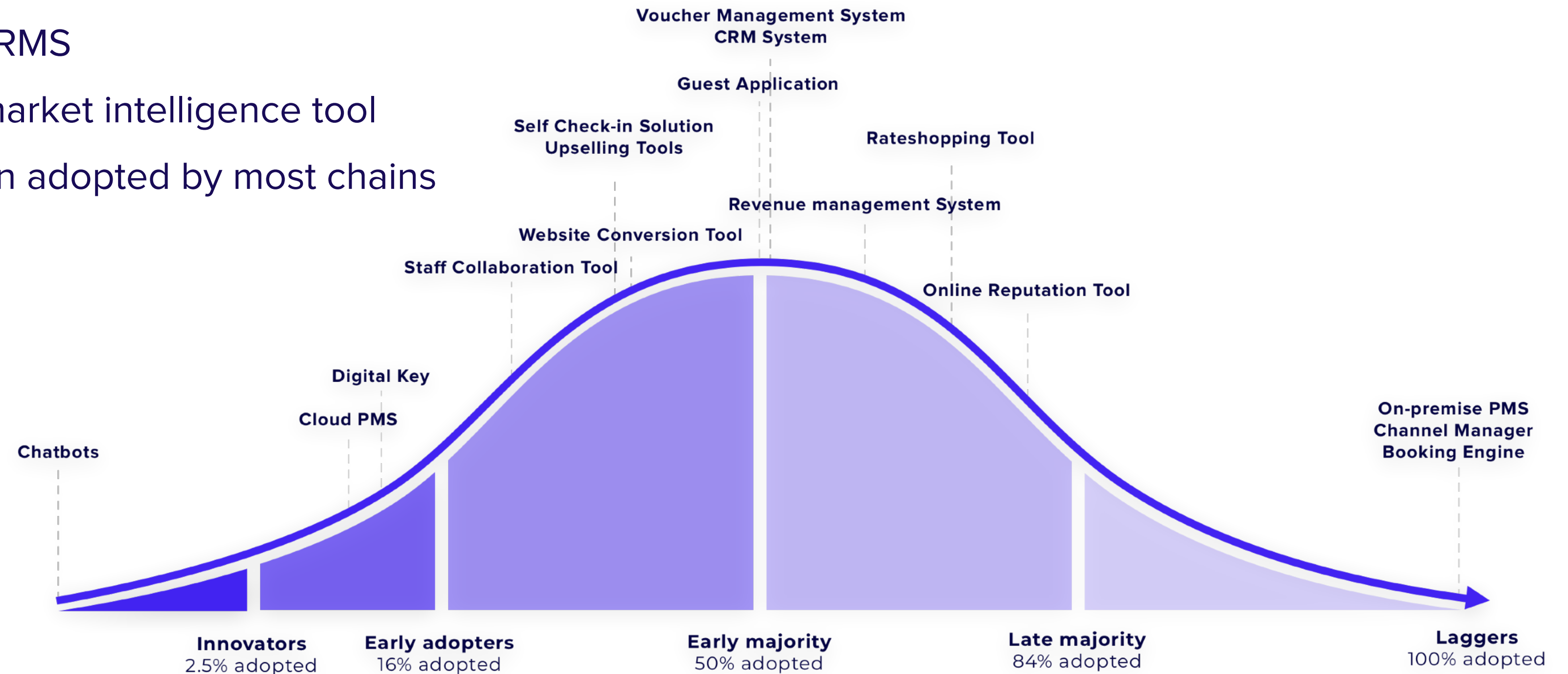




Provider's map hotel chains Germany

Tech adoption in hotel groups

- All interviewed groups had a standardised PMS per brand (excl. franchises)
 - 90% still on-premise
- 68% of brands working with an RMS
 - Many with both an RMS and market intelligence tool
- Digital check-in has not yet been adopted by most chains
- 60% of brands work with a CRM



How do they **buy software**?

|Tech procurement

- **How are you searching for new systems?**
 - Research & network
 - Pilot hotels (except PMS, CRM, etc. → RFP process)
- **Developing in-house or off-the-shelf?**
 - 25% of interviewed groups develop in-house (especially for workflow automation and when high customisation is required)
- **Is cloud a prerequisite?**
 - More than 20% prefer not having all their systems in the cloud.
- **Do you work with early stage startups?**
 - Yes, if they have the necessary infrastructure and interfaces (aka. Not really)
- **What is your typical contract length?**
 - 12-24 months maximum

4 **best practices** from **innovative** brands

Innovative & digitally-driven hotel chains



**Staff-less
Operation**



**Process
Optimisation**



**Self-developed
RMS**



**Salesforce/CRM
Centric Setup**

Any questions?



Hotelhero



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