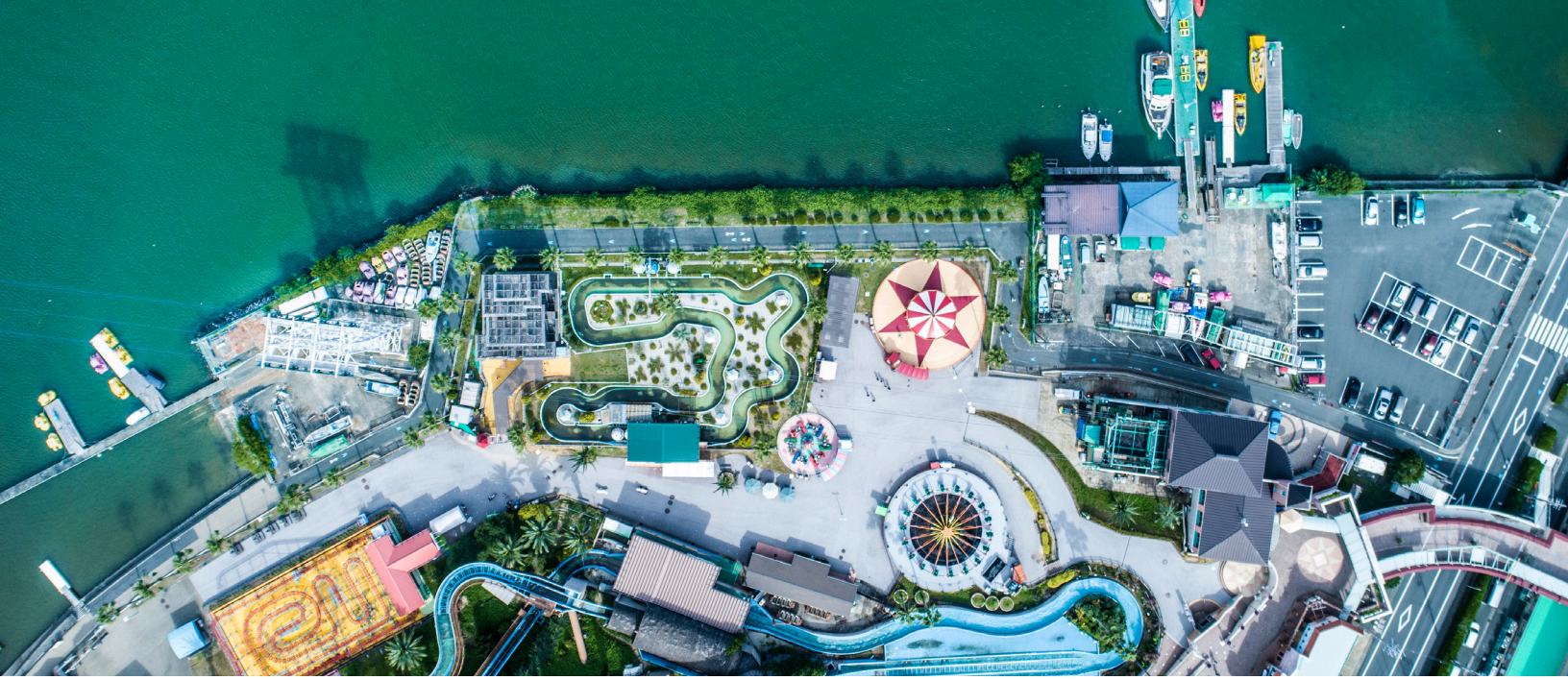
ELEVATING THE GUEST EXPERIENCE WITH MODERN HOSPITALITY COMMUNICATIONS TECHNOLOGY

2019 HOSPITALITY COMMUNICATIONS SURVEY REPORT

SURVEY REPORT | HOSPITALITY

MOTOROLA SOLUTIONS



CREATE AN EXPERIENCE GUESTS WILL WANT TO WRITE HOME ABOUT

In hospitality, communication is the key to customer satisfaction, helping businesses create the ideal guest experience while driving efficiencies that save valuable time and resources. In the quest to craft a better, safer experience, for both guests and employees, digital communication is playing an increasingly important role. As communications technology continues to reshape the hospitality landscape, questions remain for businesses striving to achieve the best customer experience possible.

What communications trends should you be investing in today to position your business for continued success tomorrow? How will integrated digital communications solutions impact your ability to craft the ideal guest experience? As devices and networks proliferate, how can you communicate more efficiently and effectively? We've been closely tracking developments in hospitality communications technology to find answers.

The Motorola Solutions 2019 Hospitality Communications Survey reveals some of the latest communications trends in hospitality, some of which may come as a surprise. We found that even as smartphone use increases, radio communication remains a powerful core tool for the hospitality sector. In fact, technology advancements have cemented radio's role as the foundation of reliable hospitality communications infrastructure. New innovations are providing radio users with a whole new level of safety and functionality.

As the hospitality industry continues to make the digital migration, intelligence-driven applications and functionality will help break down barriers by uniting workers with instantaneous communications using any device. Ultimately, this level of seamless communications can be a central catalyst for elevated guest experiences.

This year's survey queried nearly 200 U.S. respondents in a range of hospitality job functions, including customer service, information technology, maintenance and engineering, senior and middle management, communications, and security. Respondents represented a large cross section of hospitality specialties, from hotels and resorts, casinos and convention centers, stadiums and theaters.

JOB FUNCTIONS HEARD FROM:

- Customer Service
- Information Technology (IT)
- Maintenance/ Engineering
- Management
- Communications
- Security

HOSPITALITY SPECIALTIES HEARD FROM:

- Hotel and Resort
- Casino
- Convention Center
- Stadium
- Theater

INSTANT VOICE COMMUNICATION: THE BACKBONE OF HOSPITALITY CONNECTIVITY

Today, more than ever before, instant voice communication is the key to delivering a quality customer experience. Instant voice communication creates efficiencies that speed response times and improve operations. Plus, it enhances worker and guest safety. That's why two-way radios are by far the most popular form of voice communication for hospitality workers, surpassing all other forms of communications combined — including smartphones, landline phones and internet or IP voice.

PRIMARY FORM OF VOICE COMMUNICATIONS

60% TWO-WAY RADIOS

5% LANDLINE PHONES

32% SMARTPHONES

3% INTERNET/ IP VOICE

DIGITAL ADOPTION CONTINUES

Hospitality companies continue a steady transition to digital two-way radios, with over one-third of respondents already making the digital leap. When combined with users who are using a mix of both analog and digital radios, the majority of hospitality workers are using digital radio in some capacity. However, nearly a third still need to make the switch to digital. Among those who have yet to transition to digital two-way radio, over 40% plan to do so in the next five years, with 28% planning on doing so in the next year.

THE DIGITAL MIGRATION: TWO-WAY RADIOS

OVER ⅓ USING DIGITAL RADIOS

It's clear that hospitality companies recognize the importance of migrating from analog to digital two-way radios. The power of crystal-clear, real-time communication—enhanced by nationwide push-to-talk LTE functionality and intelligence-driven applications—means digital radios offer a new competitive edge as well as a modern platform able to support future advances in communications technology.

FINDING A NEW FREQUENCY FOR RADIO MAINTENANCE

Of those who use digital two-way radios, a majority still take a reactive approach to performing maintenance, with most respondents saying their company waits until it's absolutely necessary. Nearly 60% of respondents said their company only performs radio maintenance "as needed", when something breaks or is past due for an update. Our survey also found that the majority of hospitality workers are still maintaining their two-way radio systems in-house or through a local service provider.

Companies with this type of reactive approach to maintenance are taking on big risks. When radios are unavailable, overall communication is often delayed or it simply breaks down altogether. When top-notch service is measured in customer response times of seconds and minutes, radio down-time and the disruption it causes, can spell disaster.

In addition, putting the burden of maintenance on in-house staff detracts from priority number one: ensuring the highest level of customer satisfaction. Changing your maintenance stance from reactive to proactive by investing in a two-way radio maintenance plan can help alleviate some of the pressure on staff and ensure hospitality operations are always equipped with the latest, most up-to-date software and features. All of this adds up to greater control, enabling you to address minor issues before they become major communication obstacles.

RADIO MAINTENANCE FREQUENCY

58% of hospitality workers say they maintain their radios as needed, while **10%** said they do not know how often they perform radio service.

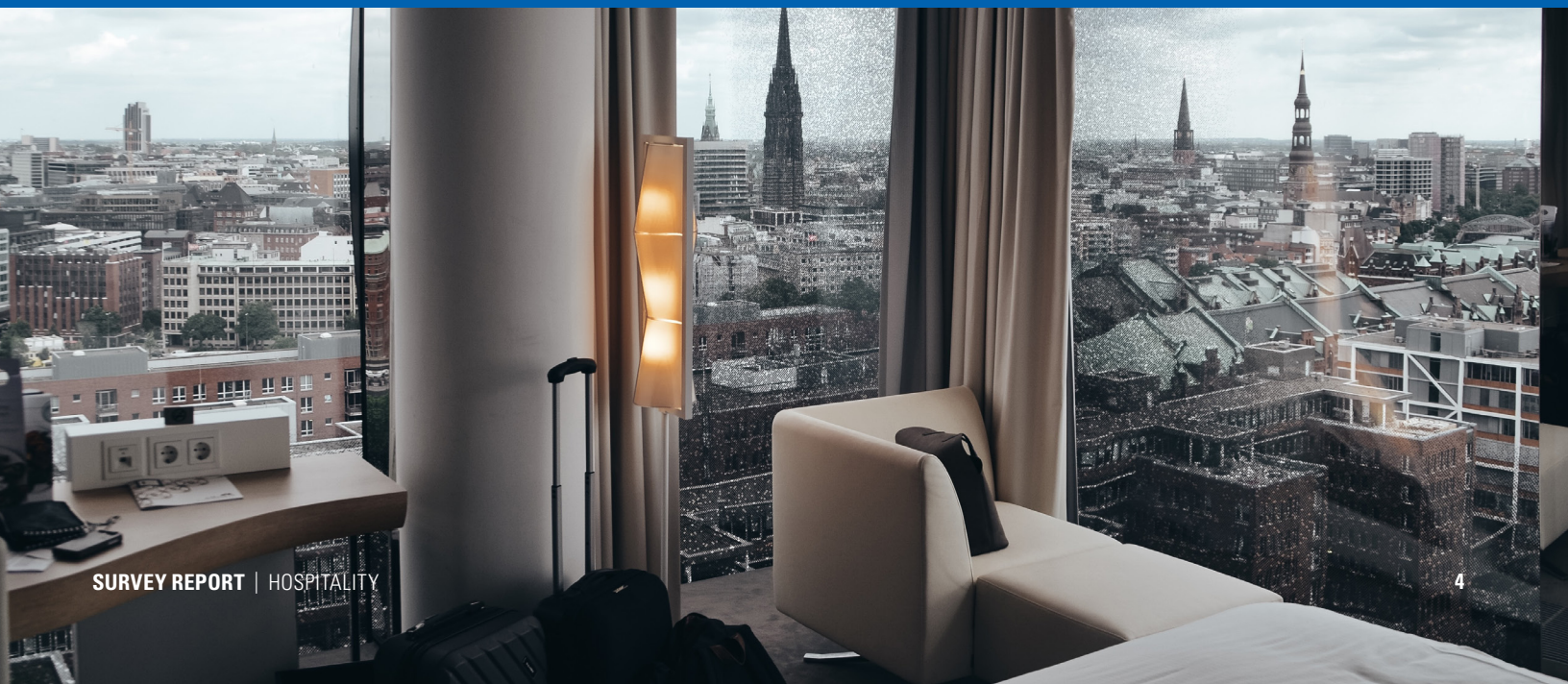
COMMUNICATIONS MAINTENANCE

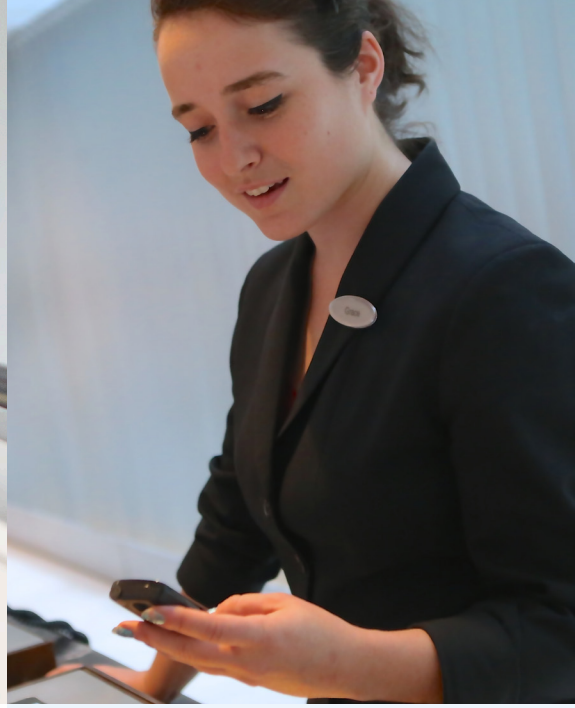
- **In-house technicians/IT: 45%**
- **Local service provider: 34%**
- **Communications manufacturer: 7%**
- **Do not know: 14%**

MOTOROLA SOLUTIONS TWO-WAY RADIO SERVICES

Two-Way Radio Services help you get the most out of your radio investment. Motorola Solutions can help alleviate the responsibility and pressure of maintaining and managing your communications by offering expert, reliable management of all your communications devices. This provides you with peace of mind and ensures your business is keeping up with the speed of innovation as efficiently and cost-effectively as possible. With three levels of service, you can always find the amount of support that's right for your operations.

SEE HOW OUR SERVICES CAN OPTIMIZE YOUR DEVICES >





UNIFIED TEAM COMMUNICATIONS: ALL DEVICES, ANYWHERE

The average number of connected devices consumers use in their daily lives continues to grow by leaps and bounds—a trend that will only accelerate as Internet of Things (IoT) technology continues to expand. The same is true for the hospitality industry. Across the board, workers report using more than one device to communicate on the job, with 80% saying they use multiple devices. Today's hospitality workers are using two-way radios and smartphones, as well as landline and IP-based phones to communicate with each other.

4 OUT OF 5 OF HOSPITALITY WORKERS

use more than one device to communicate with other employees on the job.

Instant communication is central to customer experience and ensures guest and worker safety. But with so many workers using so many different devices, communicating instantly and seamlessly with colleagues over any device, in any location, can be a challenge. Hospitality workers ranked the ability to communicate with colleagues across devices as the most important aspect of their communications system. Further stressing the importance of unified team communications, the next two most important aspects were the ability to reach workers regardless of location and protecting hospitality staff and guests with safety features.

94% OF HOSPITALITY WORKERS SAY IT WOULD BE VALUABLE IF ALL THEIR DEVICES COULD COMMUNICATE WITH EACH OTHER.

UNIFIED TEAM COMMUNICATIONS: THE POWER OF NOW

Is your hospitality enterprise operating at the speed of now? Maintaining customer satisfaction and ensuring safety for guests and workers—all while running a profitable, efficient hospitality business—requires instant, real-time communication. Unified Team Communications from Motorola Solutions makes it all possible, allowing you to communicate instantly, without boundaries, with added intelligence and confidence.

Powered by the WAVE™ Push-to-Talk (PTT) Application, Unified Team Communications takes PTT beyond the boundaries of traditional radio. It unites all teams under one network, allowing general managers, guest services, maintenance, security, and other integral teams to stay connected through the radio system without having to use multiple devices.

Unified Team Communications extends PTT to smartphones, laptops, tablets, and PCs, so employees will always be informed and in touch, transforming the guest experience, keeping customer satisfaction at the forefront, driving efficiencies across your operation, and assuring safety and security.

DISCOVER TEAM COMMUNICATIONS

INTELLIGENCE IN EVERY MOMENT

In hospitality, timing is everything—but precision matters just as much. With so many moving parts and factors to consider in providing the ultimate guest experience, employees need more than just voice-to-voice communications. They need actionable intelligence and team-specific applications that help automate tasks and streamline processes. Hospitality workers indicated that text messaging and alerting, work order and job assignment applications, and video surveillance would be the most helpful applications to have on the job. Access control, alarm and event management, and indoor location tracking were also popular selections. These intelligence-driven applications help improve productivity, deliver efficiency, and enhance communication across all teams.

TOP REQUESTED APPLICATIONS AND FEATURES

Text messaging and alerting	Work order and job assignment	Video surveillance	Access control	Alarm and event management	Indoor location tracking

TOP COMMUNICATION CHALLENGES

Hospitality employees indicated that coverage is by far the most urgent communications challenge they face in their line of work. They also listed battery life, connecting workers and teams, and device reliability as other key challenges. Fortunately, new communications technologies are being introduced that can help overcome these challenges.

TOP COMMUNICATION CHALLENGES

- Coverage
- Battery Life
- Connecting workers and teams
- Device dirability/reliability
- Audio quality

MOTOTRBO® NITRO™: THE FUTURE OF RADIO IS HERE

MOTOTRBO Nitro enables a seamless, Citizen Broadband Radio Service (CBRS) solution by combining business-critical voice and private broadband to deliver reliable, lightning-fast data securely across teams and at every level of your organization.

On-premise private broadband: Don't bring consumer broadband to a commercial site. Nitro lets you do more with less, providing twice the capacity and up to four times the range of WiFi to maximize efficiency while minimizing disruption.

Leading with voice: Instant voice communications will always be critical for the hospitality sector. Deliver seamless, secure, high-fidelity voice conversations across your entire operation over private, high-speed broadband.

Full management and control: Focus less on managing your network and more on leveraging its performance to transform the guest experience and improve operations. Remove the hassles of network management while enabling full control of your business via a cloud-based portal.

EXPERIENCE MOTOTROBO® NITRO™ >

SAFETY: THE FOUNDATION OF A GREAT GUEST EXPERIENCE

Ensuring the safety and security of guests and workers is a fundamental duty for any successful hospitality business. It is also one of the most demanding, requiring constant vigilance and heightened situational awareness. Hospitality workers cited video surveillance as the number one security capability used at their place of work, with three quarters of respondents utilizing it. However, a mere 8% are able to leverage video analytics to access vital intelligence from their surveillance videos. This represents both a major pitfall and a golden opportunity for hospitality organizations, especially as new technological advancements are revolutionizing video security, providing greater insight and visibility with far less hassle and effort. Video analytics can increase safety while also allowing staff to focus more time and effort on direct customer needs.

TOP REPORTED SECURITY CAPABILITIES

73% Video surveillance

48% Incident dispatch, tracking and reporting

42% Access control

8% Video analytics

AVIGILON, A MOTOROLA SOLUTIONS COMPANY. ADVANCED VIDEO SOLUTIONS FOR HOSPITALITY.

Your video solutions should seamlessly integrate into your existing operations and technology solutions. Avigilon's end-to-end HD video solutions do just that, providing built-in intelligence that makes it simpler and easier to focus on what's important—your guests. Avigilon enables security professionals to quickly and efficiently search through vast amounts of footage, freeing up the time it would take to watch hours of tape. Deep security provides an extra layer of protection for your data. And Avigilon's user-friendly, intuitive platform makes migration and implementation a breeze, all while providing a cost-effective, powerful, and intelligent technology solution to enhance security and ensure guest safety.

SEE HOW AVIGILON CAN HELP SECURE YOUR OPERATIONS >

NATIONWIDE COMMUNICATION

Traditionally, hospitality operations have been focused on a single building or group of local buildings. Today, as hospitality companies are competing on a more national scale and guests have come to expect a seamless guest experience from properties located coast-to-coast, that may be beginning to change. 56% of respondents indicated nationwide communication was important for their business. And when it comes to communicating more locally, the definition of "on-site" communication is expanding as well. Today, businesses need to communicate instantly, without fail, using high bandwidth data throughout a building, next door, down the block, or across the country.

WAVE TWO-WAY RADIO TLK 100: NATIONWIDE PUSH-TO-TALK

Get the best of both worlds with instant two-way radio communication at a nationwide scale. By connecting to your existing Land Mobile Radio (LMR) system and smartphones, the WAVE radio extends push-to-talk benefits to all your team members, whether they're on the same property or at a resort location across the country.

SHOP WAVE TWO-WAY RADIO >

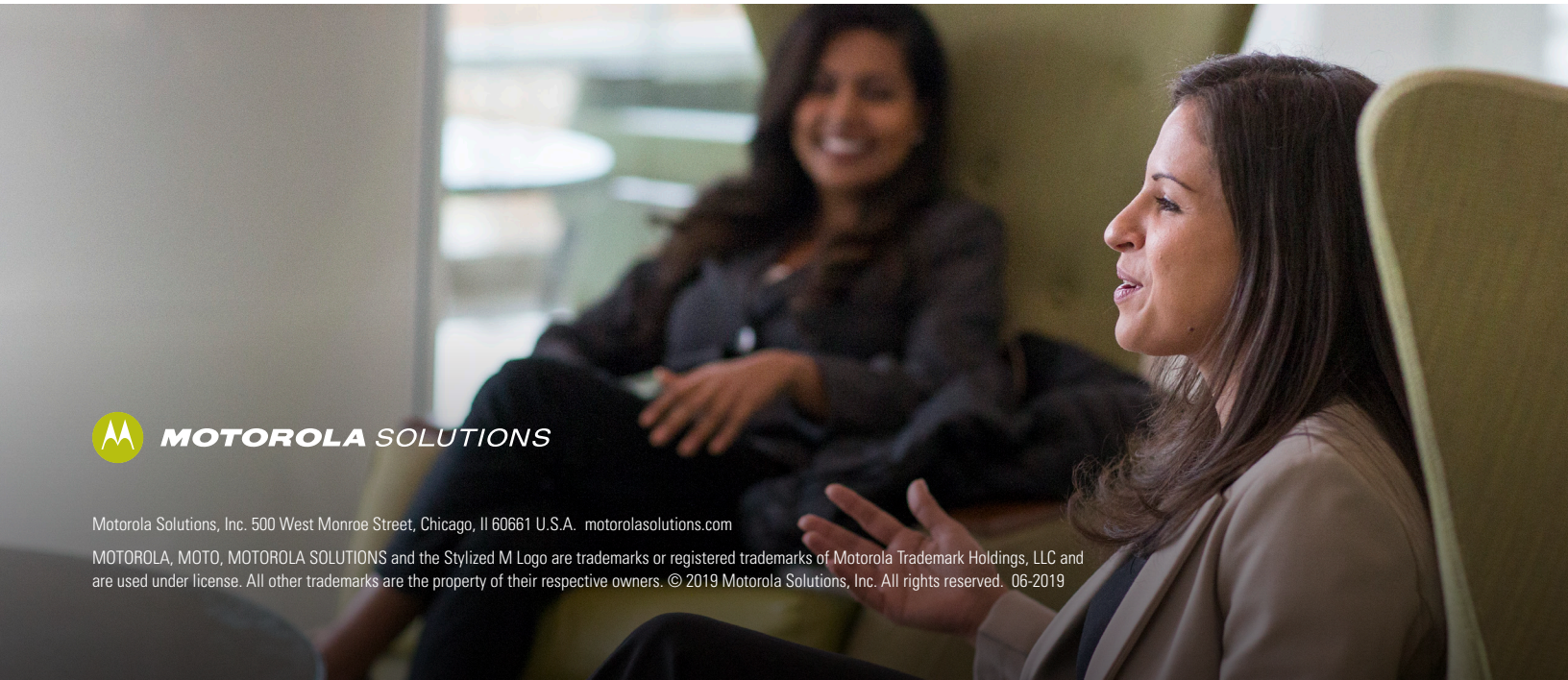
ELEVATING GUEST EXPERIENCE STARTS WITH CONNECTED, EMPOWERED WORKERS

The Motorola Solutions 2019 Hospitality Communications Survey offers an inside look at the way hospitality workers view communications technology today. They require integrated communications technology that connects all teams on all devices. They need solutions that keep them connected and informed with intelligent insights that enhance the guest experience while ensuring safety and security.

The continued transition to digital two-way radios, the rise of analytics-powered video, and an increase in intelligence-driven applications is helping meet these communications needs. But as the survey shows, there's still a great deal of progress hospitality enterprises can make to empower their staff with more productivity and efficiency so they can deliver the safest, most enjoyable guest experience possible.

As the transition to modern unified communications continues, empowering hospitality workers with intelligent, reliable connectivity will set you apart from the competition and create an experience guests will want to write home about—and one that will keep them coming back for more.

To learn more and explore how we're bringing hospitality communications into the future, visit: **motorolasolutions.com/hospitality**.



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