**Tech Report**

# h2c's Digital Hotel Operations Study

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**h2c.**

# Inhalte

# Einleitung

Da die Digitalisierung in der Hotellerie ein grundlegender Bestandteil der Wertschöpfungskette ist, konzentriert sich die diesjährige globale Studie auf digitale Hotelprozesse im Bereich der Guest Journey und basiert auf dem Feedback von 84 Hotelketten, die mehr als 2 Millionen Zimmer weltweit repräsentieren.

Während Hotelbetreiber und Systemlieferanten mittlerweile ausgereifte Technologielösungen anbieten, auf die sich die Gäste zunehmend verlassen, befinden sich die Hotelketten in Bezug auf die Digitalisierung (auf einer Skala von 0 bis 10) immer noch im Mittelfeld, so dass es sowohl bei der Digitalisierung als auch bei der Personalisierung noch viel Raum für Verbesserungen gibt. Die folgenden Einblicke und wichtigsten Ergebnisse werden Ihnen helfen, die Herausforderungen und Chancen besser zu verstehen. Bitte zögern Sie nicht, uns zu kontaktieren, wenn Sie an weitere Studiendetails interessiert sind.

# Einblicke

### Treiber der Digitalisierung im Hotelbetrieb

- Online-Direktbuchungen in Rekordhöhe treiben die Innovation voran, da Gästedaten durch eine wachsende Zahl loyaler Kunden, die an klassischen Treueprogrammen oder Instant Gratification-Programmen teilnehmen, leichter zugänglich werden. Datengestützte Kundeneinblicke werden durch mobile Websites und eigene Apps der Hotelketten weiter unterstützt, was die Service- und Verkaufsmöglichkeiten vervielfacht. In der Global Hospitality Distribution Study von h2c im Jahr 2022 nutzten nur 54% der Befragten CRM-Systeme. Dieser Anteil ist bis heute auf 76% angestiegen, was CRM zu einem wesentlichen Instrument für den Kundenerfolg macht.

- Die Qualität der Systemintegrationen mit dem PMS als betriebliches Kernmanagementsystem hat sich seit 2017 deutlich verbessert. Die größten Verbesserungen sind umsatzbezogen und betreffen die folgenden Systeme: Internet-Buchungsmaschine (IBE), CRS und/oder Channel Manager und RMS. Der Grad der Systemintegration (definiert als vollständig oder weitgehend integriert) ist über den 5-Jahres-Zeitraum stark angestiegen, um 65% für IBE und um satte 91% für CRS/Channel Manager.

- Die Verbesserung der Gästezufriedenheit ist für fast alle Hotelketten das oberste Ziel der Digitalisierung. Die damit verbundenen Kosteneinsparungen sind ein willkommenes Nebenprodukt, aber nicht das Hauptziel.

### Die größten Herausforderungen der Hotelketten bei der Digitalisierung

- Die Systemintegration ist nach wie vor die größte Herausforderung bei der Digitalisierung der betrieblichen Prozesse. Während umsatzsteigernde Systeme wie IBE einen hohen Integrationsgrad erreicht haben, weisen betriebsbezogene Systeme wie Spa-, Golf- und andere Servicemanagementsysteme den niedrigsten Integrationsgrad auf. ORM (Online Reputation Management) -Systeme weisen den zweitniedrigsten Integrationsgrad auf, was eine verpasste Chance darstellt, da Gästefeedback sofort umgesetzt werden könnte.

- Nach Selbsteinschätzung der Hoteliers liegt ihr Digitalisierungsgrad nur auf Platz sechs von zehn. Neben dem Mangel an hochwertigen Systemintegrationen zählen das Fehlen einer schlüssigen digitalen Strategie, Personalmangel und unzureichende Kompetenzen zu den größten Defiziten.

- Die großen Ketten schätzen sich selbst als am stärksten digitalisiert ein. Diese Selbsteinschätzung kehrt sich jedoch um, wenn es um die Personalisierung geht, bei der sich die kleinen Ketten als fortschrittlicher einschätzen. Wir glauben, dass viele kleine Ketten flexibler und experimentierfreudiger bei der Nutzung neuer/ innovativer Systeme sind als ihre großen Pendants. Insgesamt zeigt der Grad der Personalisierung im Vergleich zu 2021 einen deutlichen Aufwärtstrend.

- Da die Inflation und die steigenden Löhne der Zulieferer die Kaufkraft der Hotelketten beeinträchtigt haben, sind die Gesamtsystemkosten ein wichtiges Thema bei der Anschaffung neuer Technologie. 83% der Befragten gaben an, dass die Systemkosten zu hoch sind, ein Anstieg um 14 Prozentpunkte innerhalb eines Jahres im Vergleich zur h2c-Umfrage im Jahr 2022.

## Digitale Betriebsprozesse bieten zahlreiche Möglichkeiten

- Das größte Potenzial zur Verbesserung des Gästeerlebnisses durch digitale Prozesse liegt in der Ankunfts- und Aufenthaltsphase. 34% der Ketten bieten heute einen Online-Check-in mit digitalen Schlüsseln an und ebenso viele (34%) planen, dies in Zukunft zu tun. Die automatische Gästeerkennung wird von 25% der Ketten genutzt und 36% planen die Einführung dieser Funktion. Echtzeit/ on-demand Housekeeping wird heute nur von 14% der Ketten genutzt, aber doppelt so viele planen die Einführung dieser Funktion. Digitales Bestellwesen, On-Demand-Dienste und Energiekontrolle sind von rund 30 % der Ketten geplant.

- Obwohl die Hotelketten voll integrierte Zahlungslösungen als sehr wichtig erachten, ist die automatisierte Zahlungsabwicklung noch nicht vollständig integriert. Derzeit verfügen nur 34% der Hotelketten über eine voll integrierte Zahlungslösung, während 59% über ein Zahlungsgateway verfügen und 7% die Zahlungen manuell abwickeln, was bald der Vergangenheit angehören wird.

- Intelligente Zusatzverkäufe während des Aufenthalts (über eine App, eine mobile Website oder digitale Bestellungen) werden heute nur von 27% der Hotelketten genutzt. Es wird erwartet, dass mobile Technologien mit einem Voice-First-Ansatz in den nächsten 2-3 Jahren zusätzliche Einnahmen während des Aufenthalts des Gastes generieren werden. Diese Wachstumsprognosen werden durch die Überzeugung der Hoteliers unterstrichen, dass sich ihre Nebeneinkünfte durch Zusatzverkäufe von heute 15% der Gesamteinnahmen auf 29% fast verdoppeln könnten.

- Die Steigerung des Online-Wissenstransfers innerhalb der Abteilungen und darüber hinaus ist entscheidend für den Kundenerfolg. Obwohl 78% der Ketten virtuelle Meetings, Online-Schulungen und E-Learning nutzen, organisieren nur 44% der Unternehmen einen strukturierten/ kontinuierlichen Online-Wissenstransfer.

- Sowohl der Umwelt- (ESG) als auch der Energiekostendruck wirken sich auf das Ergebnis der Hotelketten aus. Investitionen in intelligente Gebäude, wie z. B. belegungsbasierte Energiemanagementsysteme, sind daher eine lohnende Investition. Heute sind 25% der Immobilien von Hotelketten intelligente Gebäude, und dieser Anteil wird voraussichtlich rasch steigen.

- Der Einsatz von KI-gesteuerten Systemen wird sich auf viele Prozesse im Gastgewerbe auswirken, darunter Marketing und Vertrieb, personalisierte Dienstleistungen und Energiemanagement, um nur einige zu nennen. Bei sechs der sieben im Fragebogen aufgeführten KI-Anwendungen ist der Anteil der Hotelketten, die in diesen Bereichen Chancen sehen, im Vergleich zu 2021 stark gestiegen (eine ist in etwa gleich geblieben). Es wird sehr deutlich, dass die Macht der KI und des maschinellen Lernens in der Hotellerie angekommen ist.

- Hoteliers erwarten das höchste Maß an Innovation in den Bereichen KI, Energiemanagement und ESG (Top 3), gefolgt von Augmented Reality/ Virtual Reality und robotergestützter Prozessautomatisierung (RPA).
    o Da die h2c-Umfrage 2022 vor der Einführung von ChatGPT durchgeführt wurde, ist die Auswirkung auf die diesjährige Umfrage ein atemberaubender Anstieg der potenziellen KI-Anwendungen um 53 Prozentpunkte auf 86%. Mit den realen Beispielen von ChatGPT ist KI für mehr Hoteliers zu einer realisierbaren Lösung geworden.
    o Obwohl in der Studie 2022 nicht enthalten, wurde das Energiemanagement sofort als zweitwichtigstes Innovationsfeld eingestuft (74%).
    o ESG (60%), AR/VR (45%) und robotergestützte Prozessautomatisierung (41%) haben im Vergleich zu 2022 alle an Bedeutung gewonnen.

- Da sich die Systemfähigkeiten und deren Integration in den letzten fünf Jahren erheblich weiterentwickelt haben, ist die Einführung eines strukturierten Innovationsmanagementprozesses, der alle Ebenen des Unternehmens einbezieht, heute ein Muss. Dem Innovationsmanagement wird

nicht die Priorität eingeräumt, die es verdient, denn nur 35% der Hotelketten verfügen über einen strukturierten Innovationsmanagementprozess, was Raum für Verbesserungen lässt.

# Key Findings (in Englisch)

## Channel shares shift sharply
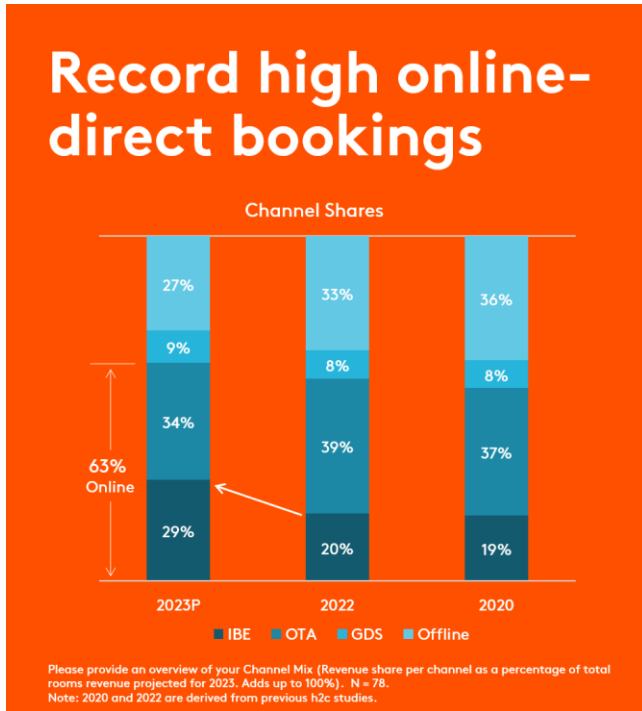


Nearly two-thirds (63%) of total hotel chain revenue is now booked online, an increase of 4 percentage points vs. 2022.

Approximately three in 10 (29%) bookings are generated through the Internet Booking Engine (IBE), an increase of 9 percentage points in 2023 vs. 2022. Compared to all previous h2c studies, direct online bookings are now at an all-time high!

Hotel chains that have focused heavily on improving their technology and CRM strategies have certainly contributed to this amazing result, as well as quality content on brand websites, loyalty offers, and an increasing customer focus using smart and agile systems. New and improved apps (not just for loyalty members) have added further value to direct online revenues.

## Digital guest communication provides operational opportunities
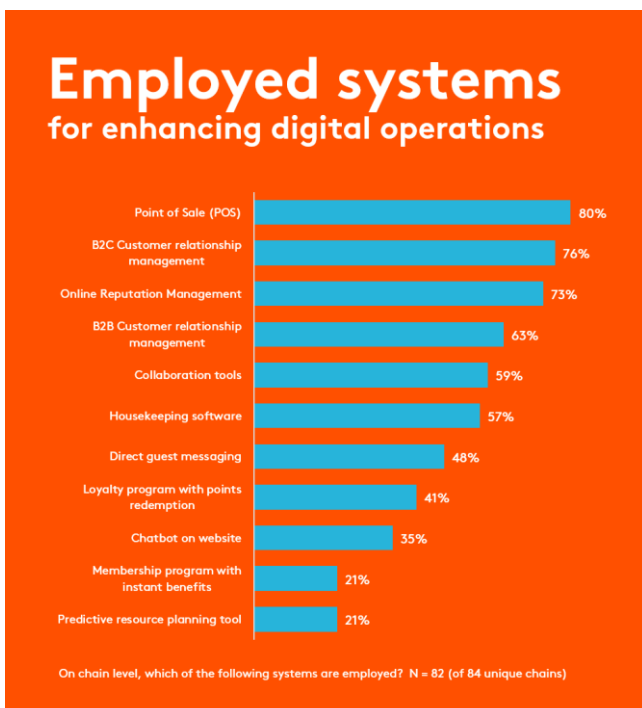


The PMS is at the core of every hotel chain's operation (100% employed) and requires various integrations with **other systems** to manage the individual requirements of each property.

Today, 62% of all hotel chains have some kind of customer retention program, meaning 41% offer a loyalty program, and 21% typically offer instant rewards through their membership program.

Point-of-sale is mostly available, but not 100%, as apartment hotels and hotels with online check-in/out can do without.

Compared to B2C CRM, which is used by 76% of the chains, B2B CRM is less widely used.

Online Reputation Management (ORM) is well established (73%) and provides unfiltered guest feedback on a hotel's operational performance.

While internal communication is progressing well (e.g., six in 10 chains use collaboration tools and 57% use housekeeping software), guest communication is lagging, with less than half of chains using messaging tools like WhatsApp and only 35% using a chatbot on their website.

# Top reasons for digitizing operations
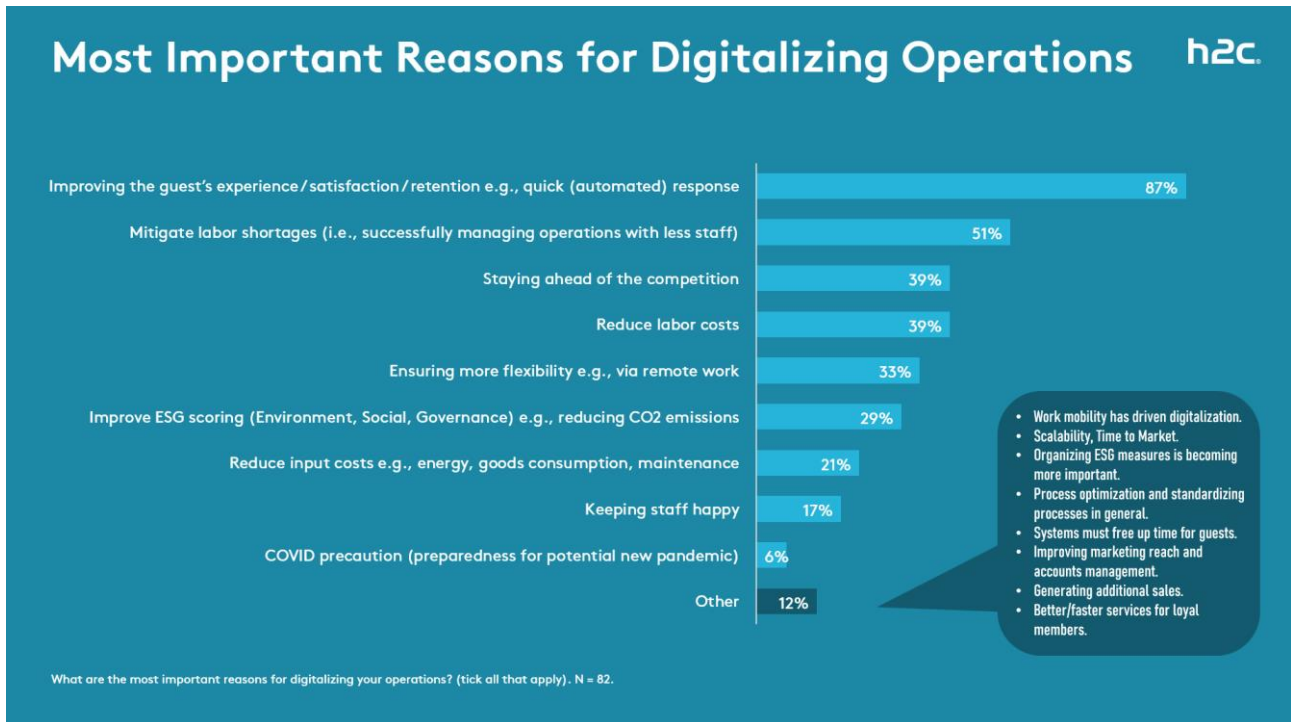


Improving the guest experience is by far the most important reason for digitizing operations, at 87%.

Mitigating labor shortages is viewed differently, being more important to large hotel chains than to mid-size chains. Reducing labor costs was cited by only 39% of respondents but was a much higher priority for large hotel chains (64%).

Ensuring flexibility through remote working and improving ESG scores both ranked low but are expected to increase in importance over time. While reducing input costs and employee satisfaction appear to be less important, 45% of large chains consider them very important.
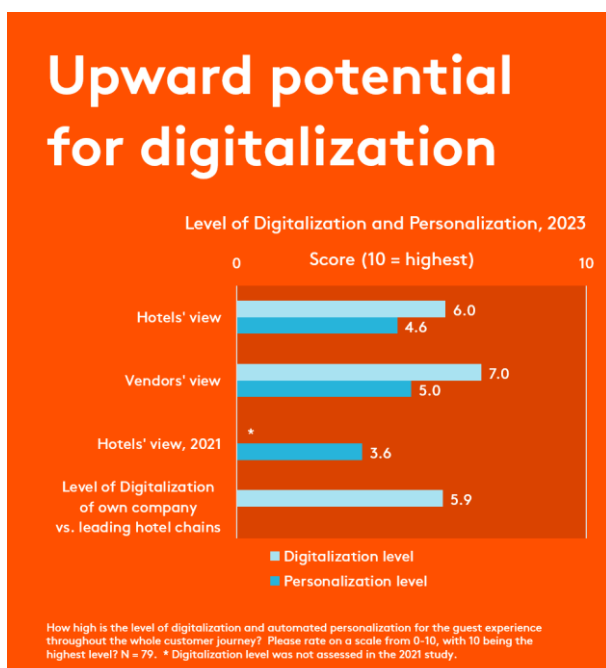
# Level of digitalization and automated personalization



With a score of six out of 10 from the hotels' perspective, the level of digitalization leaves significant room for improvement. Nevertheless, digitalization in the hospitality industry is progressing well, although it lags behind more innovative industries such as airlines.

Large chains consider themselves to be more digitized than small and medium-sized chains. However, this self-assessment is reversed when it comes to personalization, with small chains considering themselves more advanced than large chains. Overall, the level of personalization is trending upward compared to 2021.

When asked how they perceive the level of digitalization in the market, tech suppliers' rating of 7.0 is slightly better than the chains' rating.

The rating of the hotels' own level of digitalization compared to the leading hotel chains (5.9) is in line with the overall rating of the hotels' digital positioning.

## Key challenges chains face in optimizing their operations

What are the biggest challenges in optimizing operations? First of all, it strongly depends on the size of the hotel chain. In general, limited system integration capabilities were cited by more than 73% of all hotel chains, regardless of size.

Excessive system costs and staff training follow at 60% and 59% respectively, with high system costs being less of a challenge for large chains (20%).

46% of hotel chains cite limited software functionality and 43% cite staff shortages.

Limited SOPs and system unavailability (both 24%) are less of a problem for most chains.
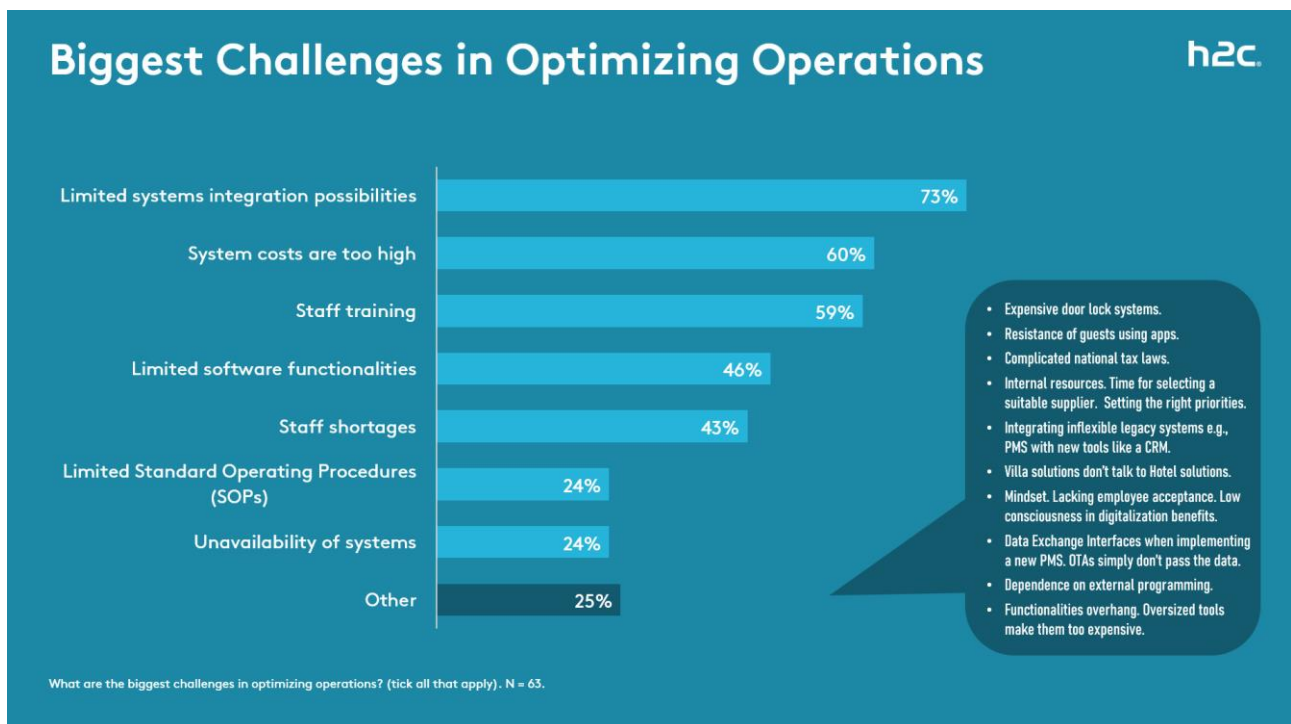


## Strong improvements in PMS integration quality

The Internet Booking Engine (IBE) is now fully and largely integrated at 91%, compared to only 55% in 2017. CRS and/or channel managers also show a high level of integration at 90%, compared to just 47% in 2017. The same is true for revenue management systems, 79% of which are now fully and largely integrated—32 percentage points higher than in 2017.

Overall, the level of system integration (defined as fully and largely integrated) has risen sharply over the five-year period, by 65% for IBE and a whopping 91% for CRS/channel manager.

The three highlighted areas maintained approximately the same level of integration as in 2017: (1) POS, (2) Sales and Catering, and (3) SPA/Golf and other service management systems; and they continue to pose a challenge for the future digitalization progress of hotel chains.

**Level of PMS integration, 2023 vs 2017**

Legend: Fully & largely integrated | Moderately & slightly integrated | Not integrated & N/A

| | Fully & largely integrated | Moderately & slightly integrated | Not integrated & N/A |
|---|---|---|---|
| Internet Booking Engine (IBE) | 91% | 5% | 3% |
| 2017 | 55% | 24% | 21% |
| CRS / Channel Manager | 90% | 7% | 3% |
| 2017 | 47% | 24% | 29% |
| RMS | 79% | 9% | 12% |
| 2017 | 47% | 34% | 19% |
| Point of Sale (POS) | 61% | 23% | 16% |
| 2017 | 59% | 27% | 14% |
| CRM | 66% | 14% | 21% |
| 2017 | 30% | 39% | 30% |
| Check-in Terminal / Kiosk / Online Check-in | 50% | 11% | 39% |
| 2017 | 21% | 20% | 60% |
| Sales & Catering Module | 46% | 16% | 39% |
| 2017 | 46% | 21% | 33% |
| BI System | 53% | 16% | 32% |
| 2017 | 28% | 28% | 44% |
| Online Reputation Management System (ORM) | 42% | 26% | 32% |
| 2017 | 21% | 20% | 58% |
| Spa / Golf / Other Services Management System | 18% | 20% | 63% |
| 2017 | 17% | 24% | 59% |

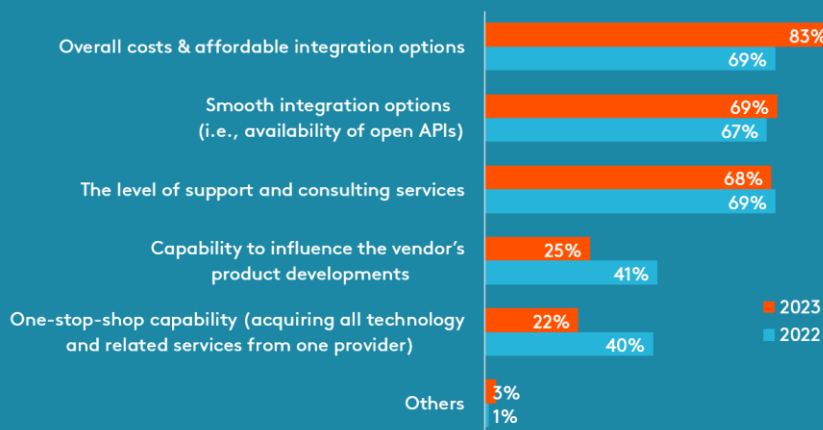How good is the PMS integrated with the following systems today? N = 58 and 140 in 2023 and 2017, respectively. 2017 data from h2c's Global PMS Study.

CRM, BI, and ORM systems are 66%, 53%, and 42% fully and largely integrated, respectively. Although they have greatly improved their integration quality over the 5-year period, they still need much deeper levels of integration.

## Key considerations when purchasing a new technology solution



**Decision-drivers for Acquiring a New Tech Solution, 2023 vs 2022**

| | 2023 | 2022 |
|---|---|---|
| Overall costs & affordable integration options | 83% | 69% |
| Smooth integration options (i.e., availability of open APIs) | 69% | 67% |
| The level of support and consulting services | 68% | 69% |
| Capability to influence the vendor's product developments | 25% | 41% |
| One-stop-shop capability (acquiring all technology and related services from one provider) | 22% | 40% |
| Others | 3% | 1% |

- Overall system and integration costs are more in focus today
- The desire to have a say in the vendor's product developments is declining
- Requests for One-stop-shop solutions nearly halved since 2022

When you are acquiring a new tech solution, which factors drive your decision? (tick all that apply). N = 72. NOTE: The same question was raised in h2c's 2022 Hospitality Distribution Study. Only the identical answer options are shown.

Compared to h2c's 2022 Global Distribution Study, overall cost and affordable integration options became even more important over the 12-month period. In 2023, 83% of all chains required greater affordability of systems and their implementation, up from 69% in 2022. This is a key focus area for hotel chains today when evaluating the upfront cost of new technology solutions.

Smooth integration options, such as the availability of open APIs, remain a strong decision driver, with 69% of respondents requiring this flexibility. The same goes for support and consulting services, which are almost equally important in both years.

However, the desire to influence the vendor's product development is less important than in 2022, dropping 16 percentage points from 2022. The need for one-stop-shop capabilities, where all technology is purchased from a single vendor, has also declined significantly by 18 percentage points in 2023 compared to the previous year.

# Digitalization along the guest journey
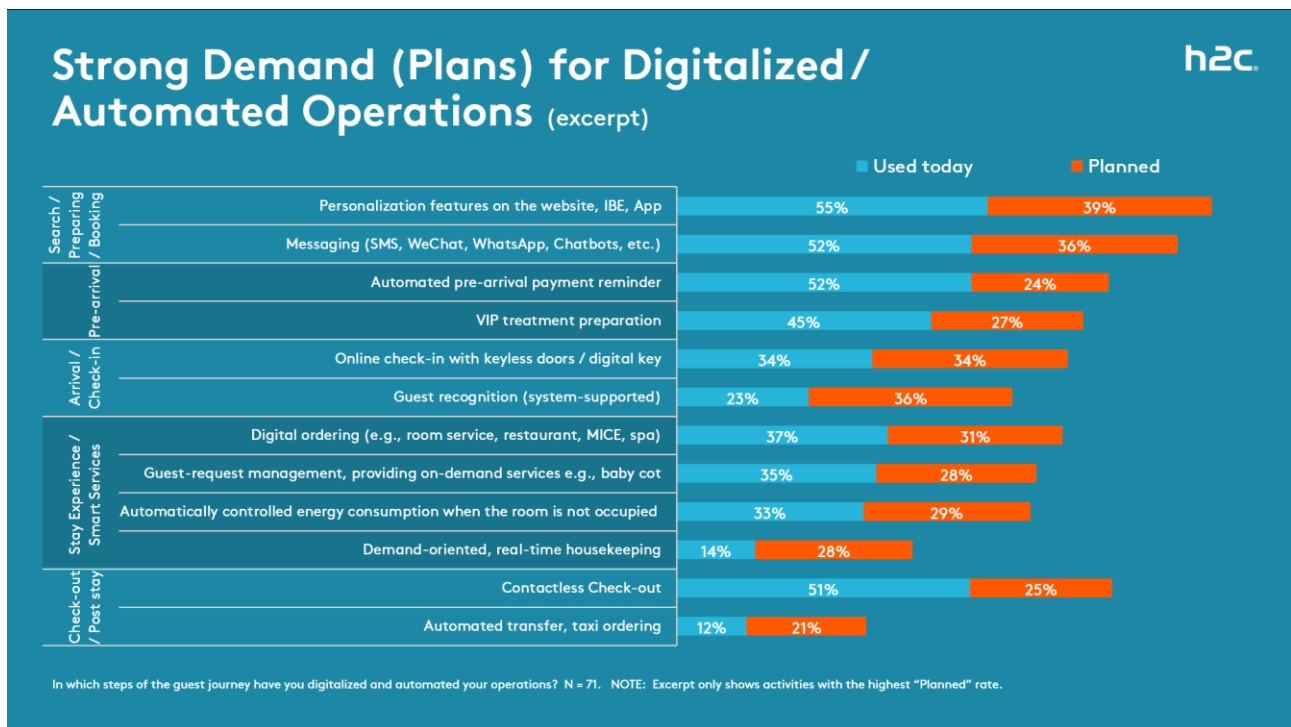


To what extent are the steps of the guest journey digitized and automated? This extract shows all results with a high level of "planned" activities.

During the search process, 36% of chains plan to use messaging and nearly 40% plan to use personalization features on their brand website, IBE and proprietary app.

Prior to arrival, about a quarter of chains plan to send automated payment reminders and use automated VIP treatment preparation. Upon arrival, 34% plan to offer online check-in with digital keys and 36% plan to use automated guest recognition.

Real-time, on-demand housekeeping is used by only 14% of chains today, but twice as many plan to use it in the future. Digital ordering, on-demand services and energy control are planned by about 30% of chains.

Contactless checkout is used by half of the chains, with another quarter planning to use it. Automated transfers are planned by about 20%.

In contrast, very few chains are planning room and/or floor number bookings, virtual reality, concierge software, digital or mobile room checks, and service robots (not shown in the chart above).

# Artificial intelligence powered opportunities
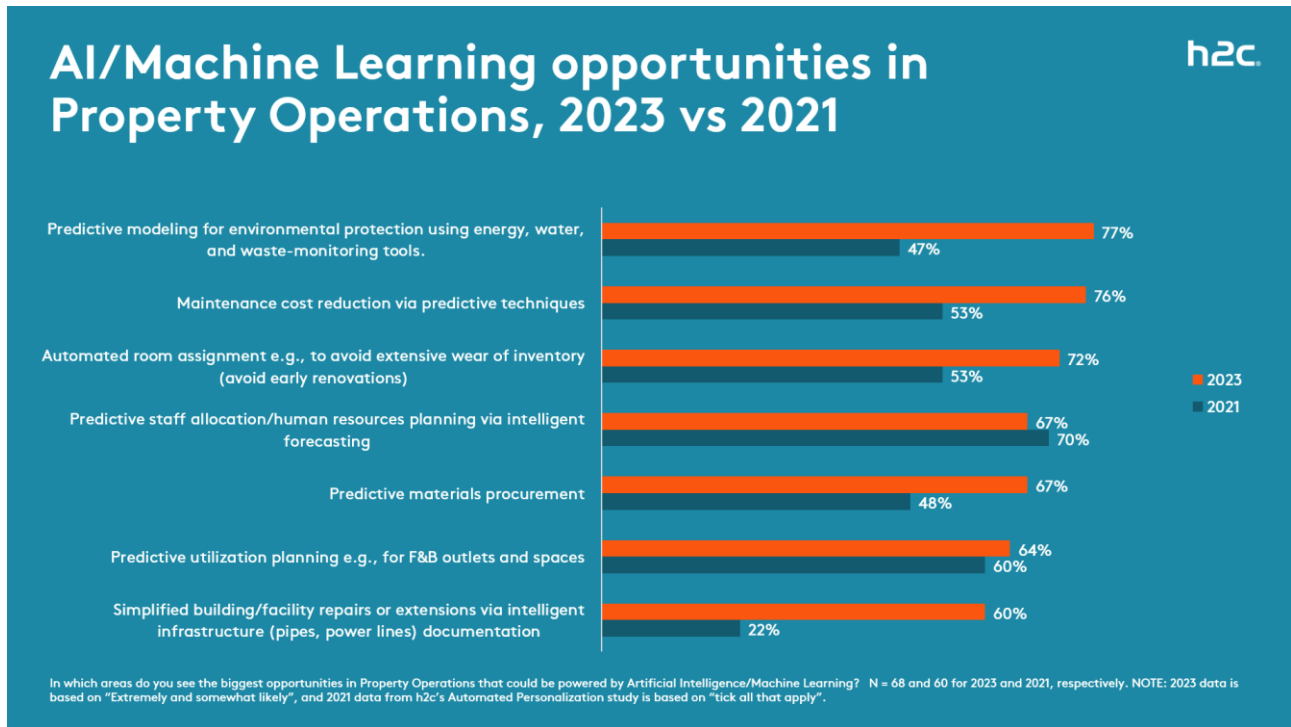


Where do hotel chains see the most AI/machine learning opportunities in property operations?

For almost all of the opportunities listed, the share of hotel chains that see opportunities in these areas has increased by a large margin compared to 2021. The power of AI and machine learning has clearly arrived in the hospitality industry.

Predictive modeling for environmental protection increased by 30 percentage points, from 47% in 2021 to 77% in 2023. Maintenance cost reduction reached 76%, an increase of 22 percentage points in 2023. Predictive staffing has roughly maintained its position over the same period.

Automated room assignment (72%) can benefit both the hotel (reducing excess wear and tear on inventory) and the guest by booking their preferred room or level.

Predictive materials procurement (67%) is another important area for leveraging AI/machine learning capabilities. It will greatly benefit developments in e-procurement.

Simplified building repair or expansion through intelligent/AI-assisted infrastructure documentation is an opportunity for 60% of hotel chains. Since 2021, this application area has almost tripled.

# The state of payments integration



## Payments still lack full integration

**How important is a fully integrated payment solution?**

Score (10 = highest)

0 | 8.8 | 10

**Which type of payment integration solution is employed today?**

- Fully integrated payments
- Manual handling
- Payment gateway

34% | 7% | 59%
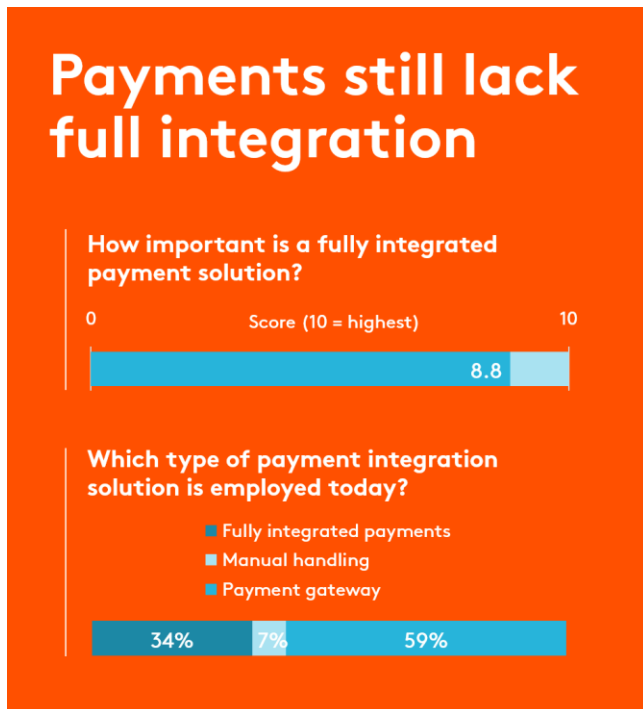
Automated payment processing still lacks full integration, even though hotel chains rate fully integrated payments as very important, with a score of 8.8 out of 10.

Only 34% of hotel chains today have a fully integrated payment solution, while 59% have a payment gateway and 7% process payments manually, which will soon be a relic of the past.

As new payment integration specialists enter the market, distribution system vendors continue to upgrade their payment interfaces. Both will help solve the full integration needs of chains around the globe.
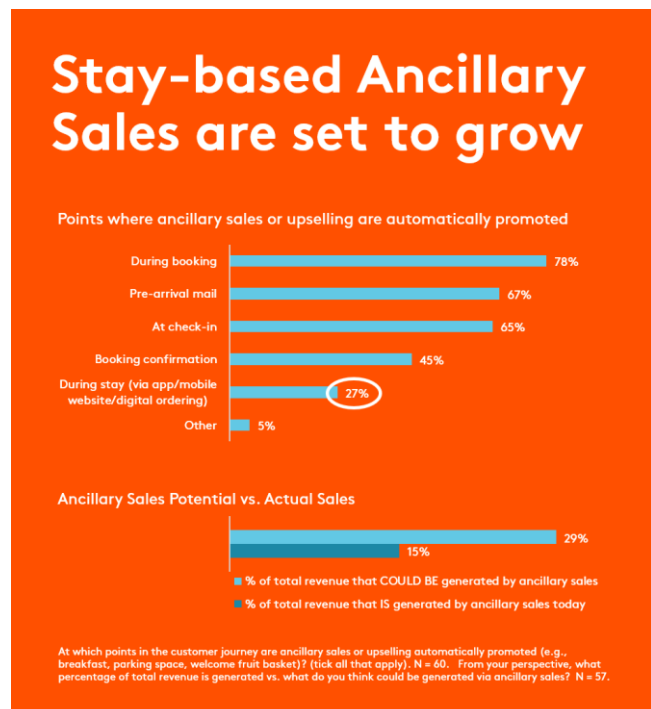
# Automated ancillary sales promotions

Most automated ancillary sales are dedicated to the booking, pre-arrival and check-in phases.
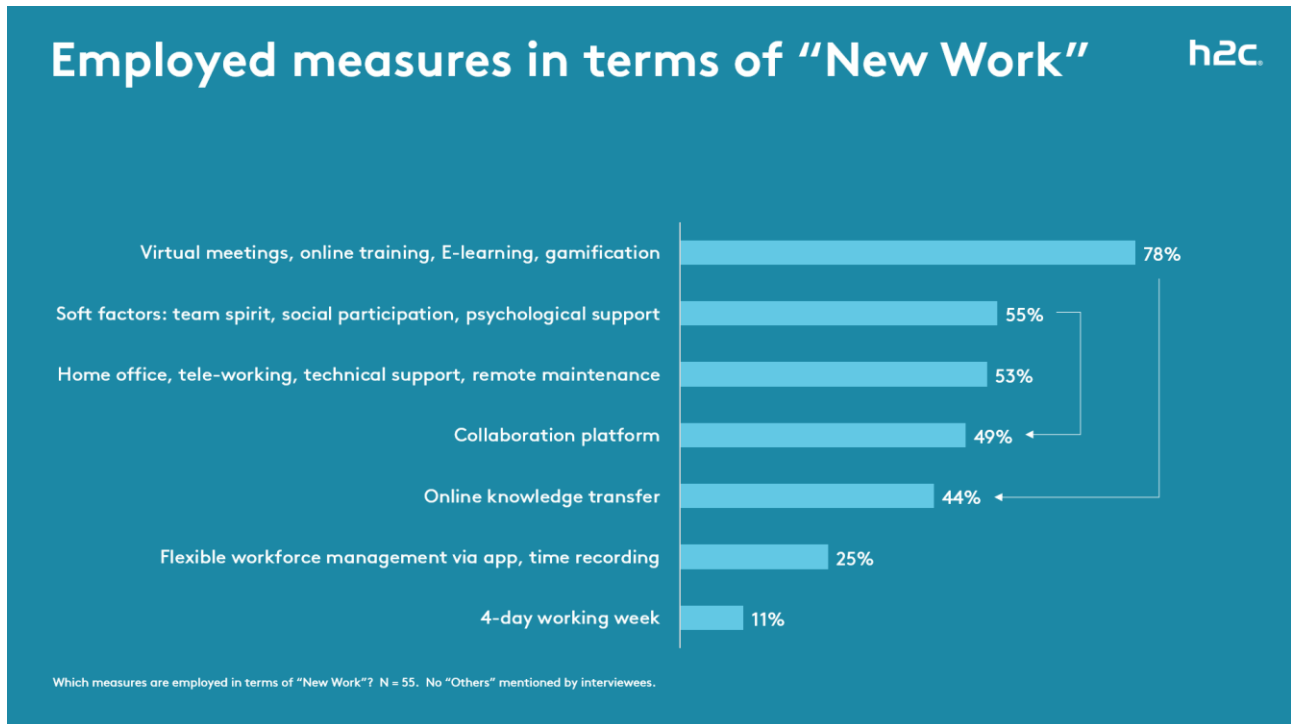
Only 45% of chains use booking confirmations to trigger ancillary sales, which is understandable as CRM specialists consider this an inopportune time (as customers have just decided against ancillary purchases in the booking funnel).

The highest growth potential was identified in the area of stay-based ancillary sales (27%). Mobile technology with a voice-first approach is expected to drive incremental revenue during the guest's stay over the next 2-3 years.

Growth projections are underscored by hoteliers' belief that their ancillary revenue could nearly double from 15% of total revenue today to 29%.



## Stay-based Ancillary Sales are set to grow

**Points where ancillary sales or upselling are automatically promoted**

| | |
|---|---|
| During booking | 78% |
| Pre-arrival mail | 67% |
| At check-in | 65% |
| Booking confirmation | 45% |
| During stay (via app/mobile website/digital ordering) | 27% |
| Other | 5% |

**Ancillary Sales Potential vs. Actual Sales**

29%
15%

- % of total revenue that COULD BE generated by ancillary sales
- % of total revenue that IS generated by ancillary sales today

At which points in the customer journey are ancillary sales or upselling automatically promoted (e.g., breakfast, parking space, welcome fruit basket)? (tick all that apply). N = 60. From your perspective, what percentage of total revenue is generated vs. what do you think could be generated via ancillary sales? N = 57.

# New Work adoption



What measures are being taken in relation to "New Work"?

Although 78% of the chains use virtual meetings, online training, e-learning and gamification, only 44% of the companies organize a structured/continuous online knowledge transfer.

For 55% of hotel chains, soft factors such as team spirit, social participation and psychological support are important and can be enhanced through collaboration platforms (currently used by 49%).

About half of the chains offer home office, telecommuting and remote maintenance services. Only a quarter offer flexible workforce management (via app or time tracking). A small minority of chains (11%) offer a 4-day work week.

# Emerging innovation trends

To identify innovation focus areas, hotel chains were asked to drag and drop pre-defined topics in order of priority. Comparing the 2023 results to h2c's 2022 Hospitality Distribution Study highlights how quickly new technologies advance and perceptions evolve.

Since h2c's 2022 study was conducted prior to the introduction of ChatGPT, the impact on this year's study is an eye-popping 53 percentage point increase in potential AI applications, reaching 86%. With real-world examples of ChatGPT, AI has become a viable solution for more hoteliers.

Although not included in the 2022 study, energy management immediately emerged as the second most important area of innovation.

ESG, Augmented Reality, and Robotic Process Automation all increased their rankings from 2022, while Blockchain technology and cryptocurrency payment solutions decreased.

## Arising Innovation Areas

h2c

| Area | 2023 | 2022 |
|---|---|---|
| Artificial Intelligence | 86% | 33% |
| Energy management | 74% | |
| ESG (Environment, Social, Governance) e.g., environmental footprint tracking | 60% | 35% |
| Augmented Reality (AR), Virtual Reality (VR), Metaverse | 45% | 36% |
| Providing local experiences / activities | 43% | |
| Robotic process automation | 41% | 30% |
| Blockchain technology e.g., for smart contracts | 26% | 42% |
| Payment solutions for crypto currencies like Bitcoin | 24% | 45% |
| Providing offers for locals e.g., restaurant discounts | 22% | |
| Rent spaces | 21% | |
| Door-to-door luggage processing e.g., between 2 hotels | 9% | |
| Rent by hour | 7% | |

In which areas do you see innovation arising in the next 2 years? (tick all that apply) N = 58. "Other" areas were not mentioned by respondents. 2022 derived from h2c's Global Hospitality Distribution Study. N = 61. Only same answer options are compared.

In summary, innovation management is not given the priority it deserves. Only 35% of hotel chains have a structured innovation management process in place, leaving room for improvement.

# Conclusion

While digitization in general has made significant progress over the past three years, direct distribution through hotel chains' websites and mobile apps, supported by loyalty and membership programs, has made great strides toward true personalization. If hotel chains can continue to grow their direct online sales (and eat into OTA share), it will greatly benefit their efforts to automate operational guest services.

Digital operations will be driven by both emerging technologies, such as AI, and the proliferation of IT systems, such as e-procurement based on predictive materials planning.

There are still many gaps to be filled, such as more direct messaging with guests after booking, and many of these measures are already on the wish list or planned by chains.
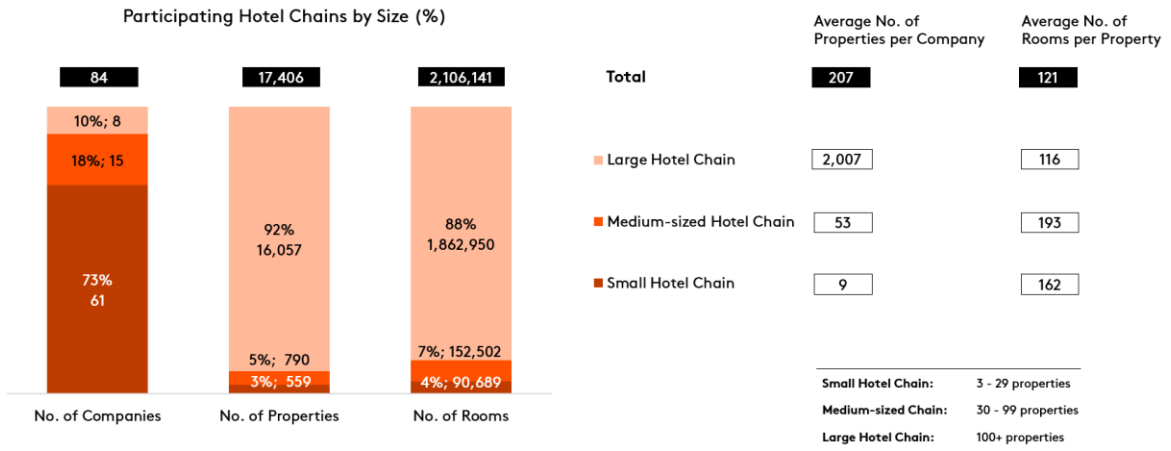
From a relatively low level of ESG activity today, action will increase in the future as more smart buildings come online, pressured by both rising energy prices and tighter legislation.

# Methodology

This study combines the findings from an online survey (completed by 79 executives of global and regional hotel chains), 13 executive interviews with hotel chains and, 7 interviews with technology providers including sponsors. In total, the study includes the answers of **84 unique hotel chains** and covers the following regions: Europe, Middle East & Africa, Asia Pacific and The Americas. The study participants are from various functions including Operations, Revenue Management, Sales, Marketing and Distribution.

The surveyed 84 hotel chains, whereof the majority are small hotel chains, represent 17,406 properties and 2,106,141 rooms worldwide. Note: the hotel chain size definition is included in the following chart.

# Participating Hotel Chains

### Participating Hotel Chains by Size (%)

| | No. of Companies | No. of Properties | No. of Rooms |
|---|---|---|---|
| Total | 84 | 17,406 | 2,106,141 |
| Large Hotel Chain | 10%; 8 | 92% 16,057 | 88% 1,862,950 |
| Medium-sized Hotel Chain | 18%; 15 | 5%; 790 | 7%; 152,502 |
| Small Hotel Chain | 73% 61 | 3%; 559 | 4%; 90,689 |

| | Average No. of Properties per Company | Average No. of Rooms per Property |
|---|---|---|
| Total | 207 | 121 |
| Large Hotel Chain | 2,007 | 116 |
| Medium-sized Hotel Chain | 53 | 193 |
| Small Hotel Chain | 9 | 162 |

| | |
|---|---|
| Small Hotel Chain: | 3 - 29 properties |
| Medium-sized Chain: | 30 - 99 properties |
| Large Hotel Chain: | 100+ properties |

What kind of hospitality company do you represent? N = 92 (84 unique chains; 6 chains provided 2 responses, and 1 mega chain 3 responses for a total of 92 responses). Note: Figures may not add up to 100% due to rounding.

# Sponsors

The following companies (in alphabetical order) have sponsored h2c's Digital Operations Study:



More than a PMS, Apaleo is the API-first property management platform empowering hotel & apartment groups to create the ultimate experience for guests & staff. Gain back control and scale your hospitality business with native multi-property management, process automation and unlimited data access. For more information, visit www.apaleo.com.



Cendyn is a catalyst for digital transformation in the hospitality industry. We help hotels around the globe drive profitability and guest loyalty through an integrated technology platform that aligns revenue, eCommerce, distribution, marketing and sales teams with centralized data, applications, and analytics, so they can capture more demand and accelerate growth. With offices located across the globe, Cendyn serves tens of thousands of customers across 143 countries. For more information, visit www.cendyn.com.

dailypoint™ is the leading guest data management and CRM platform for sophisticated individual hotels and hotel groups. It helps them extend their hospitality into the digital world. With over 200 existing integrations, data is collected from the hotel's system landscape, making guest profiling not only automatic, but accurate to use everywhere along the customer journey. For more information, visit www.dailypoint.com.



D-EDGE is a SaaS company offering leading-edge cloud-based e-commerce solutions to more than 17,000 hotels in over 150 countries.
Combining technical excellence with digital marketing expertise, D-EDGE brings a holistic hospitality technology infrastructure under one roof. The integrated range of solutions covers all stages of hotel distribution which encompasses Central Reservation System, Guest Management, Data Intelligence, Connectivity Hub, Digital Media, and Website Creation.

With a team of 500 experts located in over 25 countries, D-EDGE provides localised support, services, and tools. With its global network of 550+ partners, D-EDGE's ever-expanding ecosystem is a positive place to do business and grow.  For more information, visit www.d-edge.com.



FutureLog designs and develops digital procure-to-pay solutions for hospitality, handling all aspects of ordering, inventory management, invoicing and more.
Headquartered in Switzerland, with offices in Böblingen, Paris, Bangkok, Singapore, Sydney and Dubai, we have 20+ years of experience in digitising and automating P2P processes, ensuring cloud-based accessibility and seamless connectivity. For more information, visit www.futurelog.com.



Mews is the leading platform for the new era of hospitality. Powering over 3,500 properties across more than 80 countries, Mews Hospitality Cloud is designed to streamline operations for modern hoteliers, transform the guest experience and create more profitable businesses. Mews has been named the World's Best Hotel PMS Solution Provider by World Travel Tech Awards (2023). For more information, visit www.mews.com.

**planet**

Planet provides integrated software, payment and technology solutions for its customers in the Hospitality and Retail sectors and via a network of global Financial Services Partners.
Planet helps its customer and partners make the most of the connected commerce revolution. Our software and payment technology enables businesses to unlock the benefits of a more connected and digital world. www.weareplanet.com

# Media Partners

ExploreTECH

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Hotelverband Deutschland (IHA)

HSMA Germany

# About h2c

Founded in 2001, h2c provides professional services for the hospitality industry. With a focus on **technology solutions,** covering system specifications and RFP processes, h2c also offers associated project management support, among other services. Hotel management systems and services are analyzed in detail as part of our regular market research projects to identify technology trends, challenges and opportunities.

Conttessa by h2c is a unique product development that enables hoteliers to automate the updating of static content for OTAs and other channels.

Our Mission: h2c inspires success in hospitality commerce. Our passion to translate marketplace complexities into actionable strategies shapes our relationships. The goal: clients are confidently in control.

For more information, please visit www.h2c.de.