



2022

# Global Hospitality Resilience Report

An in-depth look forward to the  
future of global hospitality and the  
critical role of technology.

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## Travel Technology Trends

# A New Perspective – The Reboot of Global Tourism

2022 was no doubt better for the hospitality industry than the tumultuous journey through the pandemic. As many countries around the world welcome visitors back to their shores, we have seen how the hospitality industry is filled with adaptable and innovative business owners who are willing to get creative to meet the needs of their guests and set their businesses up for success in changing times. Despite the many challenges of the past few years, the desire to see the world hasn't changed. Even with evolving health protocols, travel bans, and shifting expectations, the travel industry has adjusted to meet that need.

At RMS, we conducted a global survey to gauge professionals' outlook on the hospitality industry, how they've adapted their business strategies and the importance of technology in the industry's future.

### Key insights from our global survey include:

- Current perceptions of the industry
- Shifts in customer demographics and expectations
- How the industry is adapting to meet these needs
- The growing importance of technology in the industry's future



“ I am really positive about the future of the industry. We moved a generation towards technology during COVID-19. I think technology has a massive role to play in delivering high service levels seamlessly and without compromises.

— Matthias Dybing, Co-Founder & Director of Nuvho

### RMS' global survey

 **500**

respondants from  
across 5 global regions

**74%**

operated indoor  
properties such as  
hotels with 26%  
from holiday parks  
and campgrounds

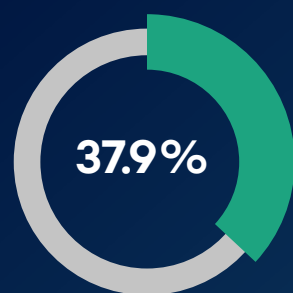
**57%**

of respondents  
operate multi-  
property enterprise  
businesses with  
43% independent

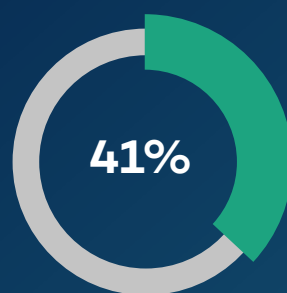


## We've Come a Long Way: The Current Industry Overview

Despite ongoing challenges with global travel returning there are emerging – but conservative – signs that the hospitality industry is on the path to recovery. After almost 2 years of border closures and uncertainty in travel there are encouraging signs that the pandemic is behind us. The hospitality industry faced unprecedented challenges with both international and local tourism coming to a halt. Despite being presented with the European war and globally inflating petrol prices, our current industry report shows we are finally on a path to recovery with consumer confidence returning. There are also notable moves into expansion plans that have been on hold over the last 2 years. Construction is beginning on new properties in many regions as market certainty is restored.



37.9% of respondents report an increase in demand for reservations and bookings 📅



41% of respondents reported stronger growth year-on-year when compared with pre-pandemic levels. 📈



“**Fortuitously, the Revenue Per Available Room (RevPAR) drop to just 20% of comparable pre-pandemic levels, soon gave way to a steady recovery with considerable uplift through the second half of 2021.**

– Kostas Nikolaidis, Executive Middle East, Africa & Greece, STR (page 140 ATM year book)







## Keeping It Local With a New Kind of Traveller

While international travel is still down, domestic and regional travel has skyrocketed in many regions of the globe. Local travel is back and attracting a new generation of travellers who are seeking cultural escapes at home that ensure ease of access and safety.

For example, in Australia, of the 6.7 Million nights booked across Western Australian Holiday parks, 88% were locals looking for a regional escape - a sharp increase in domestically driven demand.<sup>1</sup>

In addition to domestic travellers, some of those surveyed report shifting their focus away from holiday travel and more toward business-related travel, such as travelling healthcare workers and digital nomads.

### What the Industry is Saying

“ The industry climate is moving to a more domestic market, which has influenced which OTA's we work with to cater to this new demand.

here has been an increased uptake by locals (within the state) travelling and taking short breaks, but with the uncertainty of the border closures, it is really hard to set up goals, and plans as a border closure suddenly introduces a 20-40% booking loss short notice.

“Recovery has been extremely good - the domestic leisure travel market bounced back well, but the corporate market did not see the same increase.



## Changing Expectations Are Driving New Operational Demands


This shift in travellers brought with it a shift in expectations for convenient and contactless tech. Increased concern for health and safety during travel has driven customers to become hyper-vigilant about where they stay and the amount of control they have in self-managing their reservation driving demand for less person-to-person contact and richer tech experiences.

 **33%** report new demands for guest facing tech - contactless check-in, self-management and instant communication are crucial for modern operators to keep pace.

Flexible cancellation policies are also in high demand, after the unpredictable border closures and lockdowns preventing booking certainty. Additionally, guests now expect greater control to make changes to their itineraries. Travellers are also looking for more flexible travel options that include easy cancellation policies due to global political uncertainty and technology that continues to meet the post pandemic trend of the 'bleisure' traveller.



“

 Trends that are here to stay following the pandemic are 'bleisure' – a 2021 study of global business travellers found 89% wanted to add private holidays onto their business trips in the next 12 months. At the same time, digital nomads are on the rise. These are people who have the flexibility to take to the road and work from anywhere.

– Sandeep Walia, Chief Operating officer, Middle East, Marriott International (page 181 ATM Year Book)







## Travel Technology Trends

# Strategic Investment Opportunities are Reaping Rewards

The downswing in travellers at the start of the pandemic created a rare opportunity for business owners to make capital improvements.



“Savvy clients have utilised their downtime to leverage property renovations and made improvements to enhance guest experiences through their PMS including, creating more efficiencies and automation within the guest’s management and communications.



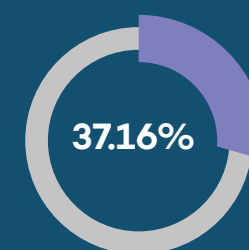
—Garth Kay, Head of Global Accounts, RMS Cloud

## Online Investment Proves Worth In Industry Bounceback

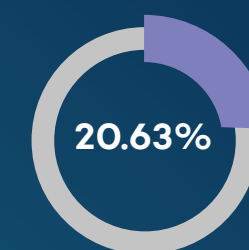
Outside of property renovations, respondents have reported the highest capital investment are technology upgrades in response to the pandemic. The shift to being more tech-reliant has seen new platforms come to



market, more highly specialised tech products and a higher rate of integration between these platforms. Operators are becoming more tech savvy along with their guests, meaning we are seeing more move toward a customised tech stack that allows a perfect fit to their properties exact requirements. A well connected PMS platform is critical as it allows this type of use case, giving the power back to the user.



Reported investment in tech upgrades to their property



Have increased their investment in digital marketing activities



# Revenue Management Strategic Shifts

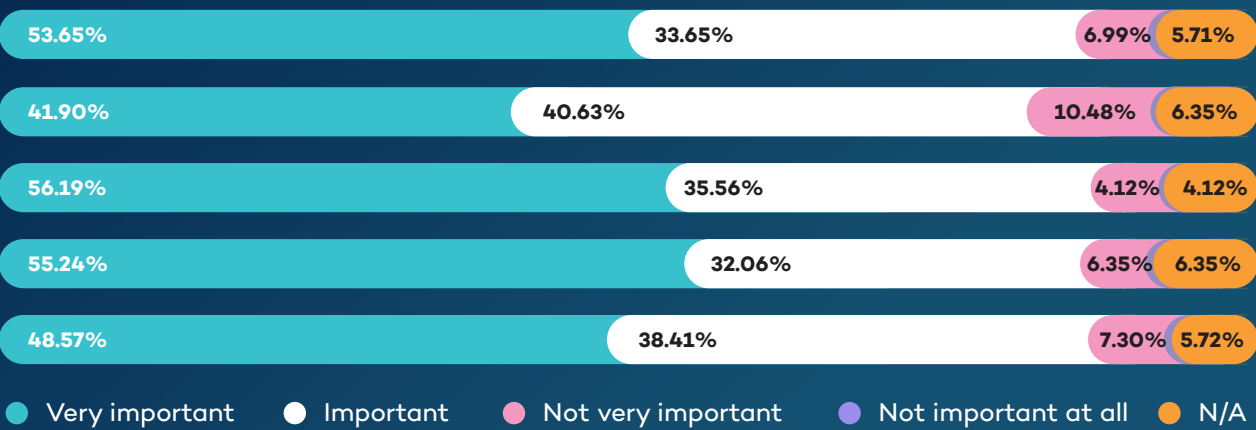


Another area of high investment was into revenue management, with business owners making changes to their revenue strategy and some giving revenue management consideration for the first time.

## How have the past 12 months impacted your revenue management strategy?



## How would you rate the importance of being able to easily access the following data types:







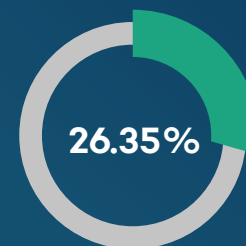
## Leveraging technology to Boost Revenue



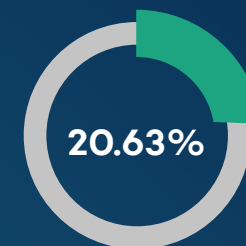
With dramatic changes in pricing and shortened booking times, revenue management software has been critical in helping property owners navigate the pandemic. While smaller properties may view the technology as a tool only suitable for large chains with big budgets, the right automation processes can help free up staff and grow any business.

New advancements in technology are allowing operators to maximise their revenue with a multitude of new tech-enabled strategies that are unlocking hidden pockets of revenue. The ability to offer self-serve add-ons is a great example of an easily implemented and automatic measure that is yielding great results for properties in all regional markets. Proving again, that when it comes to offering your guest convenience and a direct digital interface with your business, the benefits are immediate and significant.

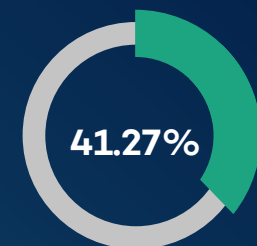
### The most utilised features of revenue management were:



Integrated  
payment  
gateways



Self-serve  
add-ons for  
guests



Dynamic  
Pricing



“ We have seen enormous interest in guest facing technology and automation since the pandemic. Interestingly, this has been seen across all our market segments. It really represents a universal shift in priorities that is being reflected everywhere.



—Vivek Gangishetty - RMS CLOUD VP of sales, India and South Asia



## Climate Action Driving Tourism Trends

The pandemic has heightened a new shift to how we consider the environment within the hospitality industry. Despite the unparalleled global challenges that we faced in 2021, the pandemic has successfully shifted our outlook on the important pillars of sustainability, innovation, people and technology, with a combined goal to reduce our global carbon emissions by 2030. In combination with global government focus and consumer behaviours shifting, climate change has changed how travellers are now reconsidering how they travel, opting for more environmental conscious businesses.



**We have seen the emerging trend of conscious travel with holidaymakers increasingly being driven by the desire to seek sustainable and safe destinations...and undertake responsible tourism activities and ultimately to ‘travel better’. Sustainability, therefore, will become an even more important factor defining the future of global travel and tourism.**

—Issam Kazim Chief Executive Officer,  
Dubai Corporation for Tourism and Commerce Marketing

With sustainability no longer becoming a choice for businesses, it is now a reality here to stay moving forward for future success. With 32.51% investing adopting new technology during 2021, it is evident that business are now leaning on technology to illustrate positive change within their business practices.







## Looking Ahead

With travel regaining momentum and COVID showing positive signs it may be on the wane, the accommodation industry will have lasting changes to grapple with as consumer behavior patterns have changed. A spotlight has been shown on revenue managers, illuminating the importance of their role and expanding it beyond “just numbers.”

**Moving forward, a revenue manager’s area of focus consists of two key parts:**

1. Analysing booking and pricing data to recognise opportunities and trends in revenue.
2. Communicating their findings to other commercial decision-makers.

This second aspect will play a much larger role in the industry, as revenue managers are being repositioned into roles of profit engineering and will need to work more closely with marketing and sales to keep their businesses in the black.<sup>3,4</sup>



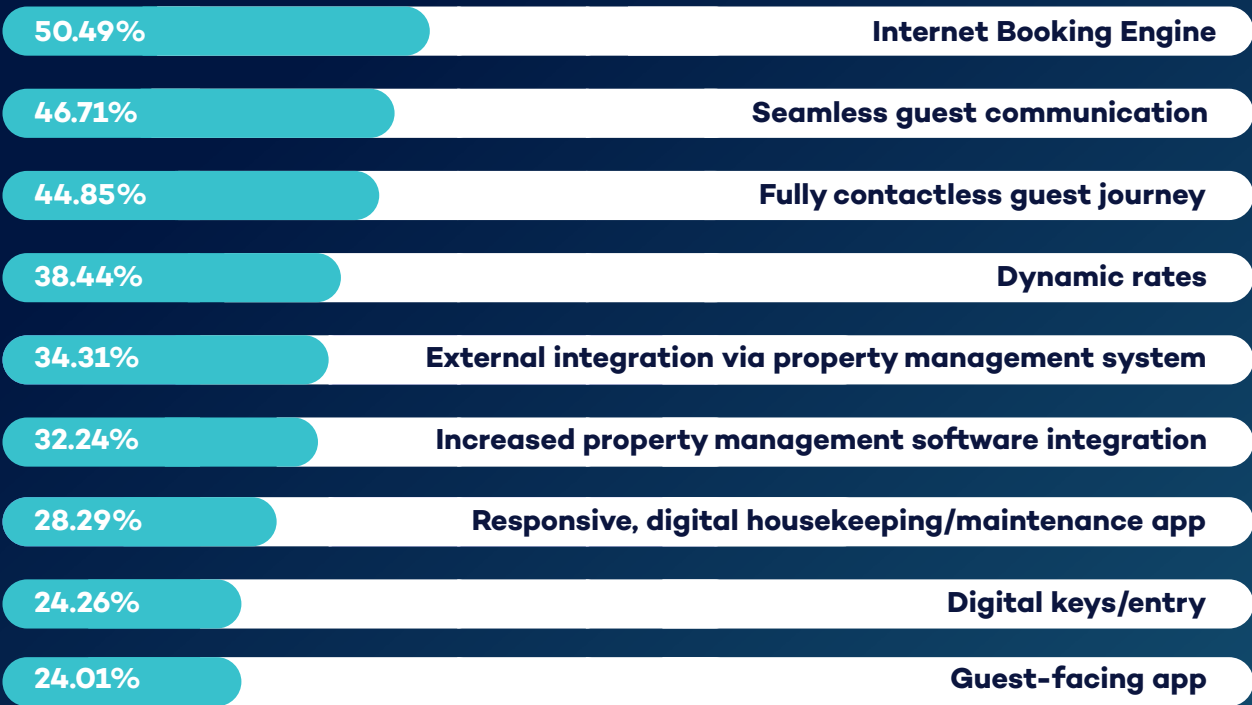
“Revenue management has changed so much. It was almost as if the city revenue managers switched roles with the more rural and coastal revenue managers. The city centre revenue managers, who were used to cherry-picking the best of the business and maximising revenue, had to start thinking about creating demand, possibly for the first time! Whereas the seaside resorts were suddenly managing unprecedented demand, something they were not used to at all.

—Jane Pendlebury, Chief Executive of HOSPA



# Tech Forward Future

As the industry moves toward a more tech-savvy position to keep up with tech-centric customers, we asked our surveyees what types of technology they thought would be very important in their business moving forward.



“The need to adopt tech, automation and external expertise, as opposed to expensive in-house resourcing will make hotels leaner and give them the ability to improve efficiencies whilst also performing.

—Matthias Dybing, Co-Founder & Director of Nuvho







## Key Survey Takeaways

- The industry is starting to see fast signs of recovery.
- Guests' travel expectations have shifted toward being more informed and tech-savvy.
- Constant shifts in demand and pricing require up to date revenue management.
- Property management software is a key element in successfully executing a strong business strategy in the accommodation industry.
- Technology holds a high place in the industry's future, with automation and digital, guest-facing software at its heart.

### About RMS

RMS is a fully integrated, cloud-based reservation and property management system. We tailor our solutions to fit your hospitality business strategy. We are leaders in hospitality software, supporting properties with innovative systems you won't find anywhere else.

Our team offers business insights, best practices, and 24/7 support to ensure user success. RMS is highly configurable to meet individual property needs, fully web-based to provide freedom and flexibility in accessing information, and a top solution for multi-property and enterprise management. To learn more, visit [rmscloud.com](https://rmscloud.com).

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#### Sources:

1. Caravan Industry Association of Australia, Industry Update – June 2021
2. Revenue Management and Online Booking: Is RMS automation good for my small business?
3. 3 Forward Questions for a Revenue Management Expert
4. The Revenue Manager of 2031





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# Global Hospitality Resilience Report

To discover the very latest in hospitality technology from one of the world's leading property management platforms, RMS Cloud, please get in touch.

[sales@rmscloud.com](mailto:sales@rmscloud.com)  
[rmscloud.com](https://rmscloud.com)  
123-4567-8910

[rmscloud.com](https://rmscloud.com)

