Grant Thornton

An instinct for growth™

Thailand:

Hotel Survey 2016

From check in to log in

Executive summary

This report provides an analysis of Grant Thornton in Thailand's annual hotel industry survey. The survey looks specifically at 4 and 5 star hotels in Thailand and was conducted in April and May 2016. A total of 66 properties took part in this research and the questions asked related to guest demographics and occupancy rates throughout the previous year, in this case 2015, as well as each properties approach to technology and digital strategy.

The research draws attention to the fact that within the hotel industry, technology is having a major influence on business plans. Most hotels surveyed agree that technology and digital strategy are important issues (89%) and 65% have a digital strategy linked to their overall business plan. Given the rapid growth rate of technology, it's encouraging to see that 73% are investing more in 2016 than they did in 2015 and 91% have confidence in their IT policy, security and governance. Of those that use technology and have an active digital strategy, 56% have their own resource to manage their policy, while 35% use both an in-house/HQ resource as well as outsourced vendors.

> *"Given the rapid growth rate of technology, it's encouraging to see that 73% are investing more in 2016"*
>
> *-Tom Sorenson*
> *Leader of travel, tourism and leisure in Thailand*

However, there were several concerns shared by those in the industry, the greatest being achieving a fair ROI on technology investments (67%) possibly because investments in technology and digital strategy are difficult to quantify. Other concerns also identified included whether staff are capable of using the technology (51%), and the privacy and security of guest information (48%).

When it comes to technology and digital strategies, it is worthwhile for hotels to consider which technologies can reduce costs, make savings and increase efficiency, and then find those that will help improve sales and finally those that will enhance guest experience.

Really understanding and segmenting different guests will allow hotels to balance the different digital strategy and technology needs and in turn add value. While training will be needed for staff, outsourcing can reduce overheads and improve efficiencies.

Social media should also be regarded as not only a means to raise awareness but also a tool to help generate income and help customer retention.

Hotel landscape in Thailand in 2015

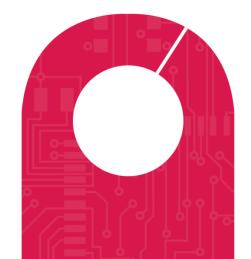## Occupancy rates increased to average of

76%

Seen by many as having the most vibrant tourism industry in the region, Thailand has continued to attract not only visitors but also a lot of investment, and is seen by many as the tourism hub of the ASEAN region. Contributing around 20% to the national GDP in 2015, travel and tourism plays a crucial role in the development and economic growth of Thailand.
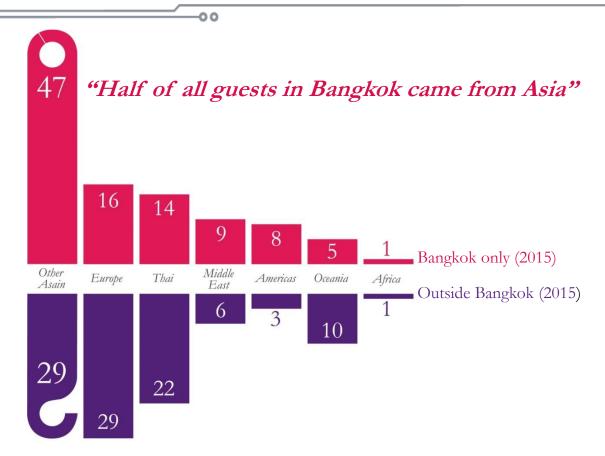
The hotel industry in Thailand suffered from many challenges throughout 2014 due to political discontent (viewed as one of the worst years in recent memory for the industry), but has made a confident comeback in 2015 with a record number of nearly 30 million visitors arriving in the country. Among these arrivals, the year saw an ever growing number of mainland Chinese tourists (more than 1 in 4 of total visitors according to the TAT), whose numbers are set to grow even more by the end of 2016 and beyond – if recent reports from Baidu, one of the top online search engines in China, are anything to go by, 4 and 5 star properties can expect to reap some big rewards as more quality tourists arrive in Thailand, driven in part by the efforts of the TAT to attract the wealthier Chinese visitors.

Based on our broad sample of hotels, there was good news across the board in 2015, with occupancy rates increasing to around 76% across the year; a more than 10% increase from the average rates seen across 2014.

Of interest also is that the occupancy rates do not vary significantly across star ratings nor across location, providing an indication that all areas and properties benefited from the increase in tourist numbers. With tourist arrivals predicted to increase further in 2016, we are likely to see an increase in occupancy rates when we conduct our survey again next year.

Hotel landscape in Thailand in 2015

47 Other Asain (Bangkok only)
16 Europe
14 Thai
9 Middle East
8 Americas
5 Oceania
1 Africa

29 Other Asain (Outside Bangkok)
29 Europe
22 Thai
6 Middle East
3 Americas
10 Oceania
1 Africa

"Half of all guests in Bangkok came from Asia"

Bangkok only (2015)

Outside Bangkok (2015)

Based on our sample of 4 and 5 star properties, in 2015 the average daily room rate (ADR), excluding tax and service, was 2,910 Thai baht (85 USD). ADR across 5 star properties was 3,642 Thai baht (106 USD); with 4 star hotels seeing an average of 2,468 (72 USD).

Looking at the nationality of guests in hotels across Thailand, almost 2 out of 5 guests were from Asian countries , with significant numbers of Chinese visitors making up the bulk of these. A further 1 out of 5 hailed from Europe, whilst local Thai guests made up the third largest segment overall. Bangkok properties tended to accommodate far more Asian nationalities (making up almost half of all guests), whilst European and Thai guests figured more prominently outside Bangkok.

No major differences between types of nationalities was seen when comparing 4 or 5 star properties, indicating that all nationalities are equally as likely to choose either type of star rating accommodation.

Half of all guests were independent tourists, with a further 1 in 5 visiting for business; tour groups and conference attendees together made up more than 1 in 4 guests. As might be expected, Bangkok saw far more business travelers (more than 25% of total), but conference guests also made up 1 in 5 bookings outside of Bangkok.

Independent tourists from mainland China are also set to grow, according to the TAT in a recent press release, and this growth is expected to be greatest among those staying in 4 and 5 star properties.

Hotel landscape in Thailand in 2015

OTAs (Online Travel Agents, e.g. Agoda, Booking.com) currently lead the way in terms of the most used booking channel, with 31% of bookings coming from an OTA – double the number seen in the North American market. However, direct to hotel bookings are not far behind with 27% of bookings made this way.

Whilst OTA bookings were very similar across the country and within the star ratings, 5 star properties as well as hotels in Bangkok are far more likely to benefit from direct bookings when compared with other properties; perhaps influenced by the larger numbers of business travelers, but could also be influenced by the ease of booking systems run by these properties on their own websites.
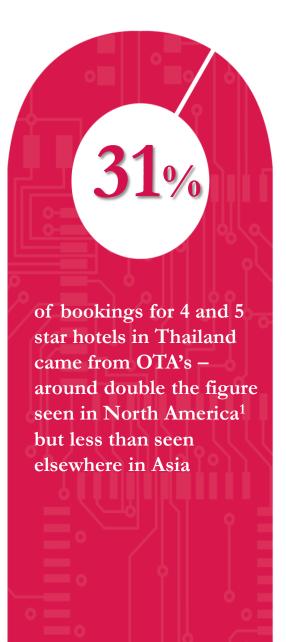
This could indicate the start of a shift away from bookings from OTA's or mean that hotels are making it easier for guests to book directly, even if guests have searched on OTA's for some initial choices.

A recent survey found that 52% of travelers will pay a visit to a hotel's website after seeing it on an OTA. And a separate survey conducted across a three-year period on the billboard effect found that over 20% of direct bookings occurred after the guest found the hotel on an OTA.

Not to be forgotten, traditional travel agents still account for 1 in 4 guest bookings among 4 and 5 star properties in Thailand – but appear to have more influence outside Bangkok.

With rising numbers of guests coming from all across Asia, hotels need to have a suitable strategy to ensure they receive as many eyeballs as possible, and from all of those key countries from where tourist arrivals are expected to grow in future.

"More direct-to-hotel bookings seen among 5 star and Bangkok hotels"

31%

of bookings for 4 and 5 star hotels in Thailand came from OTA's – around double the figure seen in North America[1] but less than seen elsewhere in Asia

Hotel landscape in ASEAN:
A comparison with Thailand

The Grant Thornton hotel survey was conducted among 4 and 5 star properties across several ASEAN countries to capture trends and data for the year 2015. Countries included in this first annual survey included Thailand, Vietnam, Philippines, Singapore and Cambodia. However, due to a limited number of responses for the first year in the latter two countries, our first report will focus on Thailand, Vietnam and the Philippines only. We expect to gather more data over the coming years in order to provide more robust trend analysis going forward.

Overall, most countries in ASEAN saw an increase year-on-year for tourist arrivals in their countries. Thailand achieved the most impressive growth during 2015 with around 20% more overseas arrivals compared with 2014 (reaching 30 million visitors), whilst the Philippines also saw double digit growth to achieve over 5 million for the first time. And although Vietnam saw very limited growth year-on-year (just 1% increase) it still managed to achieve nearly 8 million visitors across its various destinations.

Comparing occupancy rates across the 4 and 5 star properties in three key markets, we found very similar rates across Thailand and the Philippines, with an average occupancy of 75-76% in both countries across the whole of 2015. This compares with Vietnam which only managed 62% within these star rating categories – an indication not just of limited tourist growth, but also of the abundance of new hotels within the country.

When we look at the average daily room rates (ADR) among our sample of hotels, however, the picture was slightly different. Both Thailand and Vietnam were achieving very similar ADR, 4 star hotels bringing in an average of 72 USD whilst 5 star properties reached an ADR of 106 USD in Thailand and 111 USD in Vietnam. The Philippines saw far higher rates achieved, with 4 star properties bringing in an ADR of 85 USD, whilst their 5 star counterparts reached 159 USD. With both higher occupancy and ADR, the Philippines looks set to become a major player in the region.

Even more impressive for the performance in the Philippines, especially in terms of ADR, was the fact that nearly half of their market (46%) included domestic guests – this contrasts with just 16% overall for domestic Thai guests and 19% from the domestic market in Vietnam.

In terms of the source of guests that visited Thailand and Vietnam, there were many other similarities, with the majority of guests coming from other Asian countries (40% in Thailand, 33% in Vietnam) and visitors from Europe making up around 1 in 4 visitors to both countries. The Philippines, in contrast, had half the number of Europeans staying across 2015 as well as attracting fewer Asian visitors, with 28% of their guests coming from other Asian countries.

When we look at the source of the guests across Thailand, Vietnam and the Philippines, Thailand experienced far more individual tourists with just over half of their guests classified under this category. This contrasts with Vietnam and the Philippines who had around 1 in 3 individual tourists. Both Thailand and the Philippines welcomed more business travelers than Vietnam (1 in 5 guests, compared with just 14% respectively) as well as slightly more conference guests, although this category still remains quite small in these three markets. The other key difference between these three key countries was the number of tour groups seen within 4 and 5 star properties, with Vietnam experiencing 29% from this guest type compared with Thailand at only 15%. Many tour groups in Thailand tend to choose 3 star accommodation, but it would appear this trend is reversed in Vietnam.

Finally, our survey also looked at the reservation channels used across countries. Key differences emerged in this respect, and visitors to Thailand were more likely to book their hotel through OTA's – 31% compared with just 22% in Vietnam and the Philippines. Hotels in Vietnam were also far more reliant on traditional travel agencies with 40% of bookings still being made this way, compared to just 25% in Thailand and 30% in the Philippines. Owing to the larger number of domestic guests in the Philippines, they also managed to achieve 36% of bookings direct with the hotel, something that both Vietnam and Thailand would no doubt like to see increase, as they currently achieve just 1 in 4 direct bookings.
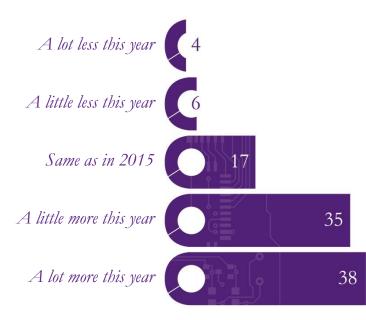
Hotels in Thailand:
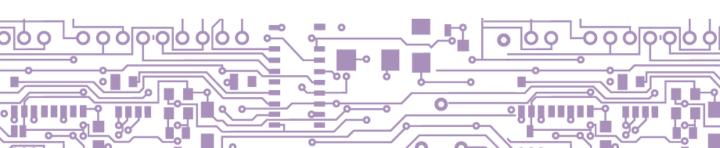## Are we ready for the digital age?

Results from our survey showed that the hotel sector in Thailand is not lagging behind and is **very much aware of the importance of technology and digital strategy.**

The future digital plan and strategy of most hotels is already linked to the overall business plan, but we found that 1 in 4 claimed that their plan is currently still in development; so "late starters" do still exist in this market. The danger may be that some hotels will get left behind as the competition for guests moves more to the online playing field; and those hotels or owners who resist the impact that it is already making on the sector may pay for these delays in the future.

Of interest was the fact **that investment in technology and digital strategy, for budgets up to the end of 2016, was still growing** among most properties.

The question may be if we will see a slowdown in investment for 2017 budgets, as hotels will have already created a lot of the basic infrastructures and networks to manage their technology strategy. The scale of budgets that will be left to maintain the digital strategy for the future are likely to be lower than the initial outlay seen in the early years, and we may see challenges in allocating sufficient funds into budgets going forward, since the resources required may not be as clear and may take time to understand better in the future.

A lot less this year 4

A little less this year 6

Same as in 2015 17

A little more this year 35
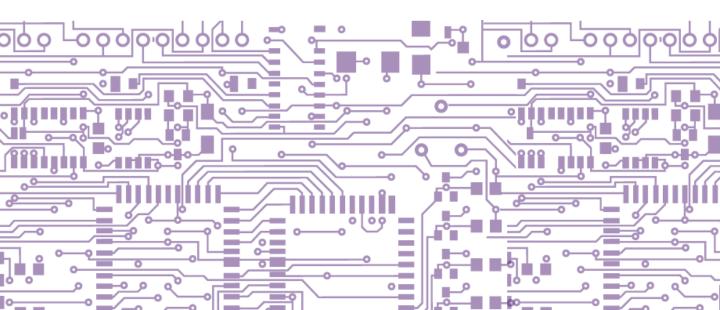
A lot more this year 38

Hotels in Thailand: Are we ready for the digital age?

When asked, most of our hoteliers were confident that they currently had an official company policy for their IT governance that would cover all possible scenarios; only 10% were not confident in their company IT policy (and these hotels were not part of global chains, either). Having said that, **only half of all hotels were able to claim they were "very confident" in their policy**, so it may be that many of the policies have not yet been fully tested to check governance in this area. With so much at stake in the digital age, and with much of the infrastructure and skills required lying outside of the normal hospitality areas of expertise, it will be important for hoteliers to ensure that they have a clear direction and policy with regards to this new era of technology.

Hotels in our survey were implementing their technology and digital strategy using a mix of both in-house full-time staff (including centrally from global HQ) as well as outsourcing where appropriate. Outsourcing in addition to in-house staff was more likely among those without a global hotel footprint. **Only 10% of hotels claimed to not have any ongoing resource**; but with most hotels believing that it is important to secure their own staff for the future development of technology in their hotel, these hotels appear to be taking quite a risk.

Many felt challenged by the timeframes for implementation. A mix of slow response times for investment from owners, as well as a fear that the chosen technology would become outdated or more expensive (when finally implemented) were typical comments made by hoteliers.

Time, it would seem, is of the essence, however, and those who don't invest wisely and with some haste may lose an opportunity.

Concerns for implementing technology in Thailand

"The greatest concern among 2 in 3 hoteliers was achieving a fair ROI for their technology investment"

Obtaining a fair return on investment was highlighted as the biggest concern among hoteliers, with 2 out of 3 properties sharing this opinion. Whilst spend on more tangible areas such as renovations might bring a more clear and measurable return, investments made in technology and digital strategy appear to be less easy to quantify - at least at the moment. For those vendors that are seeking to market their technology credentials to the hotel industry, this is a salient point that they will need to address when promoting various technology solutions. Technology firms may need to better show which solutions are proven to bring about a return, or which are more likely to become simply another cost of service.

A secondary tier of concerns was also identified among hoteliers in Thailand, with both guest privacy and security as well as cybercrime and hacking being of significant concern to many in the industry. Perhaps related in some respect to these two issues was the other major concern about staff capability to utilise the technology that would be introduced. It would appear that at least half of all hotels are not so confident in their current team's ability to manage technology, and additional recruitment or training will be needed in order for hotels to be able to fully adopt a digital strategy that is successful.
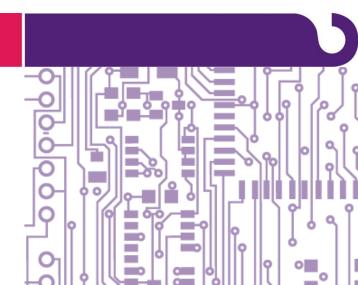
Area of concern	% of Concerned hoteliers
Fair return on investment	67%
Staff capability to utilise	51%
Guest privacy and security	48%
Cybercrime and hacking issues	41%
Malfunctioning systems	25%
Impact on normal operations	18%
Data and cyber law adherence	11%
Resource for development	10%

Concerns for implementing technology in Thailand

Are we in danger of moving away from our core function of providing guests with a memorable stay, and moving into an area in which staff may have less control or understanding? Choosing the right technologies to help with managing a hotel will be critical for the future. But the challenge will be for hotel staff to be capable to not only use the technology wherever it is implemented, but also to be able to understand how to use it and what to do with this information. Technology, as with any tool, is only as good as the people who use it and it would appear that training of hotel staff will play an important role in the smooth transition of technology use within properties.

Digital talent is being brought onboard already in most hotels, but this talent will need to understand overseas guest needs more than the domestic Thai market, and it is also quite likely that strategic partnerships with external firms will increase more in the future. However, concerns for the Resource for Development were not paramount for hoteliers, indicating that current personnel providing the solutions already have the competency to deliver.

Guest safety is paramount in any property, and hotels were equally split as to whether or not their technology will ensure continued wellbeing among guests. The threat of cybercrime as well as guest privacy was seen as a concern among half of the hoteliers interviewed and does raise questions as to how best to ensure guest safety in all aspects of their interaction with the hotel, whether it be on property or indeed online.

Hotel of the future in Thailand:
What will it look like?

When we asked hotels about their future digital strategy and investment, the areas of most importance were focused on marketing and sales activities, with future spend on social media and hotel websites seen as the key areas for spending in the future. With the forecast for increased numbers of wealthy tourists coming from mainland China, hotels should not forget about the online habits of this important group of guests; not only in terms of language and booking preferences, but also with regards to the online media channels consumed by this growing group of new arrivals; the traditional channels used for marketing to local or "western" guests will not be sufficient and hotels need to understand how to reach this new breed of guest most effectively.

With the growing numbers of Chinese visitors staying at 4 and 5 star properties (a recent report from the TAT suggests a total of 10 million mainland Chinese tourists by the end of 2016), hoteliers would do well to make plans that will both attract and cater to this growing segment of new tourist arrivals. Many of the digital gateways that traditional visitors have used will not be relevant to arrivals from China, not least with regards to social media such as Facebook, Twitter, Instagram, as well as online searches in Google – all of which are officially blocked in China. Digital strategy will need to be more diversified to reach this new breed of tourist arrivals and to make sure properties gain sufficient online "eyeballs" in China, not least for searches in Baidu, one of the most used search engines in China, that itself has predicted a significant rise in "quality" tourists from China in the future.

Data mining, online advertising and implementing tech-based solutions within the hotel were largely seen as being of secondary importance when it comes to future investment, though half of all hotels that we surveyed do have this on their agenda. Developing in-house apps and an Internet of Things (IoT) within the hotel are likely to be among the biggest challenges and with the most impact on operations. A good deal of trial and error may be required, and hotels will need to keep a keen eye on any new technology solutions being implemented. Guest feedback will be crucial in maintaining and developing the hotel of the future. The challenge may be about which technologies to implement and how guests feel about them. A collaborative approach to installing new technology may be the answer for many, and would possibly allow for more direction in future investments.

Area of technology	Importance of future investment
Social media	78%
Own hotel website	67%
CRM programmes	59%
Online advertising	49%
Data mining/Big data	52%
In-house apps	52%
Internet of Things	52%
In-room tablets	33%

Hotel of the future in Thailand: What will it look like?

Perhaps in response to the relatively high percentage of room bookings that are currently made through the OTA channel, one of the two main future developments that hoteliers believe is important to focus on was for enhanced booking software on their own website. Seen as equally important also was the need to see technology used in the check-in process, where modern solutions are able to alleviate crowding at the front desk and free-up staff for other duties. Although on paper this may seem an ideal scenario, it may bring with it some challenges relating to operational procedures as well as keeping the personal touch that guests would expect from a higher class of property.

Other areas that the majority of hotels deem to be important for future development include in-room entertainment systems as well as the checking-out process, two areas where the industry is already moving rapidly towards, especially in North America. Around half of the hotels surveyed also believed it to be important to focus on technology that can provide information on hotel facilities as well as provide greater room customisation. Slightly fewer hotels believed that in-room services and local tour information would become important in the future, and generally the properties that thought so were part of larger chains who have the capacity to implement across their portfolios.

With some reports suggesting that the size of China's internet economy (as a share of GDP) is larger than the USA, there is no doubt that the growing number of Chinese tourists will already utilise mobile technology in their everyday lives, but how hotels can capitalise on this needs to be explored further.

Hotel operational area	Important to develop further
Website booking system	78%
Check-in process	76%
In-room entertainment	68%
Check-out process	67%
Hotel facility info and booking	59%
Room customisation	51%
Local tour info	46%
In-room services	43%
External attractions booking system	33%

The same can be said of millennials and younger families, most of whom will be using mobile services and apps in their daily lives, and will wish to have more seamless connectivity in their hotel rooms as well as access to other hotel facilities and offerings. Added value to improve on guest retention should be as much a part of the digital offering as the opportunity to increase sales within the property. The modern guest will likely wish to leverage technology to accomplish things that don't require interaction with staff or require them to stand in a line at the front desk. Hotel technology will evolve further to the point where smartphones become the guest's experiential gateway whilst at the hotel, used for anything from changing the TV channel or adjusting room temperature, to making restaurant reservations and completing check-in and out. The challenge will be about how to retain the personal touch with guests, and develop a more meaningful relationship, whilst enabling them to stay connected with the hotel during their stay and use technology to make their lives easier.

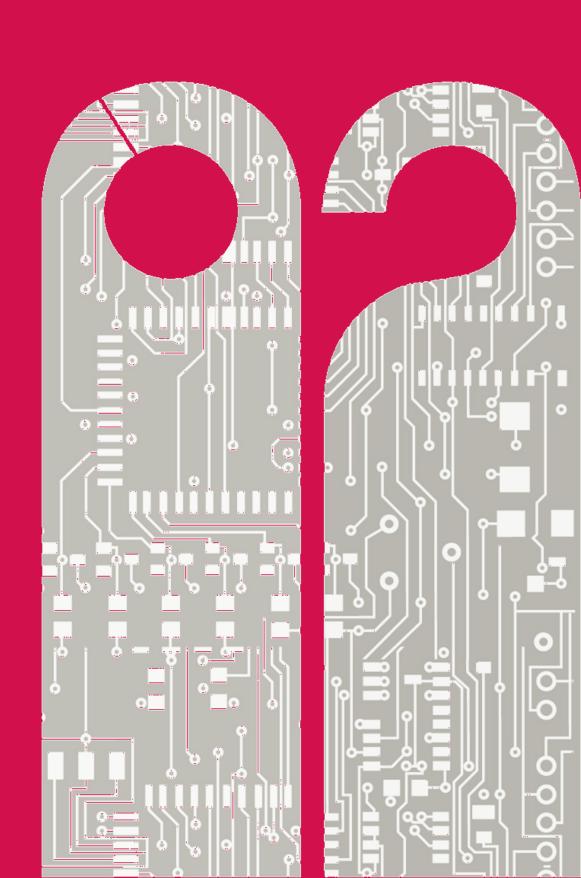# Hotel of the future in Thailand: What will it look like?

The more tech-savvy travelers of today, both leisure and business segments, will be expecting more from their guest room experience and would enjoy easy access to some of the comforts they may have in their own home. Something as humble as the room service menu can come to life and be far more tempting to certain demographics when it is placed online or made into an app. Suggestions for upselling, promotions, real time offers, automatic data mining with other guest information – all of this could contribute to increased revenues for hotels, providing it has the mechanisms to execute it in the right way.

Whilst guest privacy and a more subtle approach (compared with the retail industry) need to be maintained, there are certainly a host of opportunities awaiting the hotel industry in this respect Hotels will likely need to find ways to manage their future technology investments, and look to technology providers to be more clear on the possibilities of their solutions and how it can benefit both guest as well as hotel. Hotels will face the choice of whether to achieve their technology plans using in-house only, or whether to develop strategic partnerships with a variety of outsourced experts. This is most especially among hotels without a global footprint and with fewer resources at their fingertips.

Whilst the ROI of technology may be facing some scrutiny, other sectors have found ways in which to let tech firms build the solutions before launch. Roll out needs to be managed in a way that does not disrupt normal operations.

From comments made by hoteliers in the survey, use of technology and the IoT within the property itself may be best when rolled out slowly, not only to allow staff to get used to new operational procedures, but also to prove the concept each time. The many different departments within a hotel will naturally involve many different personnel and plenty of time for testing and training. The old adage that a workman is only as good as his tools will be as relevant to hotel technology as it would be to a tradesman. Future systems need to be intuitive, easy to use, and closely monitored to ensure they work and that the data collected can be used effectively. But when implemented in the correct way, they could also improve on efficiency, better monitor costs, and ultimately achieve a measurable ROI. This may prove to be the biggest question and the one that hoteliers and technologists need to work together on answering.

From check in to log in

Hotels need to fully integrate their digital strategy and technological improvements into their overall strategic plan.

Hotels need to understand and segment their guests to ensure that technology does not become a turn off for some. Business travelers will have different needs to older guests, millennials will be different to families, and Chinese tourists may be different to those from other parts of Asia. Once this is done, hotels can balance the different digital strategy and technology added value for each.

Consider outsourcing to reduce overheads and improve efficiencies. And ensure that staff are fully trained to do the work that is required of them. Internal staff to control the digital strategy are the best idea, but sometimes this work needs to be outsourced also.

Consider which technologies can reduce costs, make savings, increase efficiency. And then match these against technology that can help to improve sales. Followed by technology that will simply add to guest experience. Technology should provide an ROI within two to three years CRM systems will help hotels provide the WOW factor to their guests.

Social media, especially Facebook and Instagram, are proven to help generate income and retention, not simply raising awareness. But the manner in which it is used needs to be properly understood and monitored to achieve optimum results.

Google meta search is pushing out paid-for ads during searches. And traditional SEO is also becoming less effective as organised "free" search results are pushed further down the page during searches by potential guests.

Upselling is fine, but needs to be done in a more subtle manner and not in a way that would negatively affect guests' experiences. For some guests, there is nothing worse than unwanted intrusion or sales when taking a holiday break.

Apps are expensive – cheap to start, but maintenance and future adjustments are what will cost. Budgeting for this requires very good knowledge of the limitations and capabilities of any app, and this aspect should be taken into consideration before embarking on any roll out plans.

Make booking systems seamless, and ensure that the look and feel of a hotel website is the same on a laptop, tablet or smartphone.

Encourage guests to share experiences, which will improve the standing of the hotel online.

There is a balance that needs to be struck between the human touch (traditional hospitality) and technology that can improve guest experience. But using data in the right manner can and will build a deeper relationship with guests.

Use social media to create emotion and sharing. Use technology for the little things that will make the difference to guests.

Examine the entire process and details of any potential new technology before deciding, but ensure new measures are suitable for all the different guest segments that you wish to attract to your property. By using technology, you might exceed expectations with one segment but then alienate another.

A top-down management approach to technology implementation is unlikely to work well in Thailand, and the process should not just be left to staff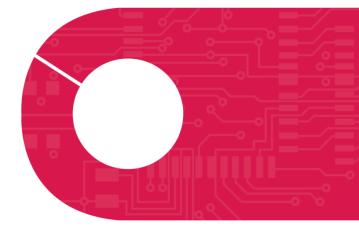 and/or operations managers to implement themselves. Conducting an audit of any new processes is an excellent way to confirm compliance and efficient use of the technology. Assigning a local hotel "digital champion" to help steer the teams through new procedures has also been proven to work well.

Survey methodology

In Q2 of 2016, Grant Thornton Thailand commissioned an independent survey among 4 and 5 star hotel properties to act as a baseline study for the Thai hotel industry to compare with other regional surveys for hotel occupancy rates, guest demographics as well as to provide insights into the use of technology within hotels.

The survey was managed and executed by BMRS Asia, an independent professional research firm headquartered in Bangkok. Each property was sent an online survey coupled with a follow-up by phone where required; surveys took an average of 10 minutes to complete. The final number of completed surveys covered 66 properties, which is approximately 1/3 of the total number of 4 and 5 star listed properties in the main resort areas of Thailand. The survey was conducted during April - May 2016, with responses about guest demographics and occupancy rates based on hotel performance across the year 2015.

Around 2 out of 3 hotels that responded to the survey were in Bangkok; with other hotels equally split between those in the Phuket region, and those in other key resort areas across Thailand. There was a slight skew in our sample towards 4 star properties, and among 5 star hotels, most were located in Bangkok; compared with half of the 4 star properties, which were located outside Bangkok.

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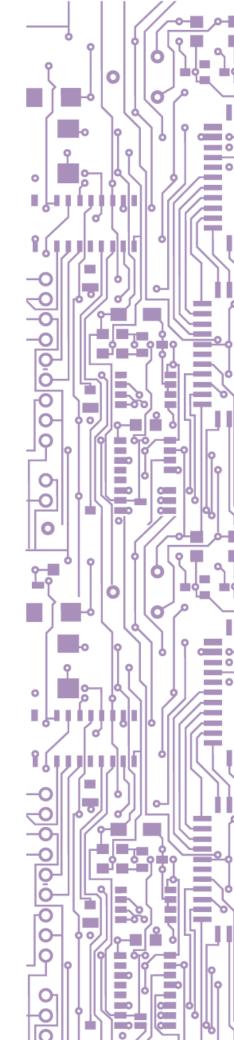
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