



ENHANCING THE GUEST EXPERIENCE WITH **INTEGRATED COMMUNICATIONS**

MOTOROLA SOLUTIONS 2021 HOSPITALITY SURVEY REPORT

ADDRESSING EVOLVING HOSPITALITY CHALLENGES WITH TECHNOLOGY

The hospitality industry is entering a new era in which connectivity – between people, facilities, and data – represents the ultimate competitive advantage. Unified communications technology will be a key enabler of this connected workplace, with the ability to advance three connected goals: safety, efficiency, and reliability. That’s why many forward-looking businesses are transitioning toward systems and devices that enable a seamless exchange of information.

To learn more about how hospitality professionals are strengthening their communications technology to support a more connected workplace, Motorola Solutions conducted the 2021 Hospitality Communications Survey.

This year’s survey queried approximately 125 U.S. respondents, ranging from C-level executives, to senior and middle managers, to specialists and coordinators. Their job functions included guest-related services, information technology, security, transportation, and operations. The survey covered a large cross section of industry specialties, including hotels and resorts, casinos, convention centers, stadiums, theaters, restaurants, and more.

The findings highlight a business sector in transition. One moving toward a world of greater connectivity, automation, integration, and innovation. This world will be built on unified communications technology and industry leaders are already demonstrating its benefits for both people and productivity.

125+ RESPONSES. REPRESENTING A RANGE OF INDUSTRIES AND JOB FUNCTIONS. AT COMPANIES OF ALL SIZES.



Hotel or Resort



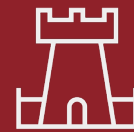
Casino



Stadium



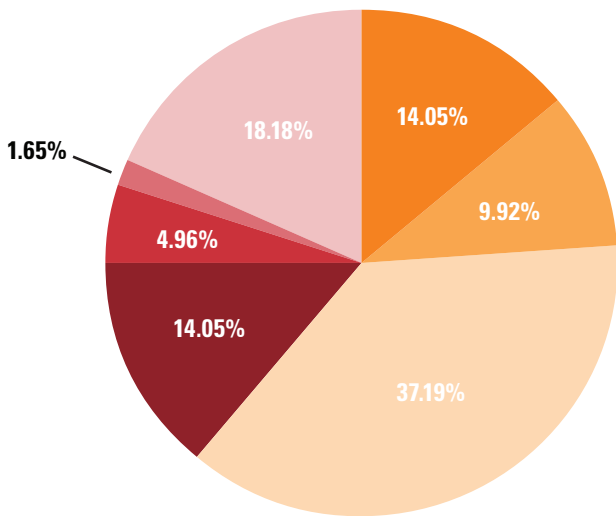
Theater



Amusement or Theme Park

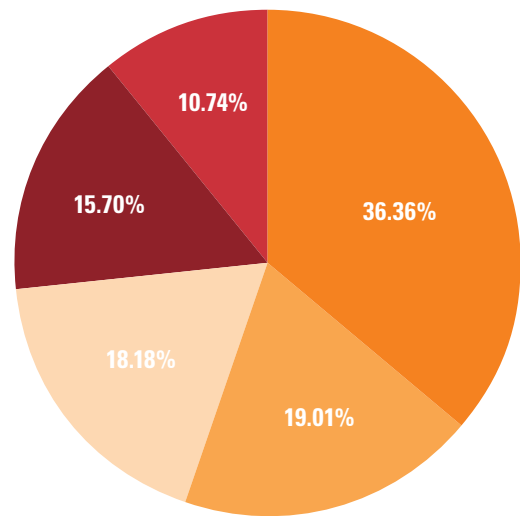


Golf Course



Respondent Industry Specialty

- Customer Service/ Guest-Related Services
- Information Technology
- General Management
- Security, Safety
- Communications
- Transportation
- Other



Respondent Company Size

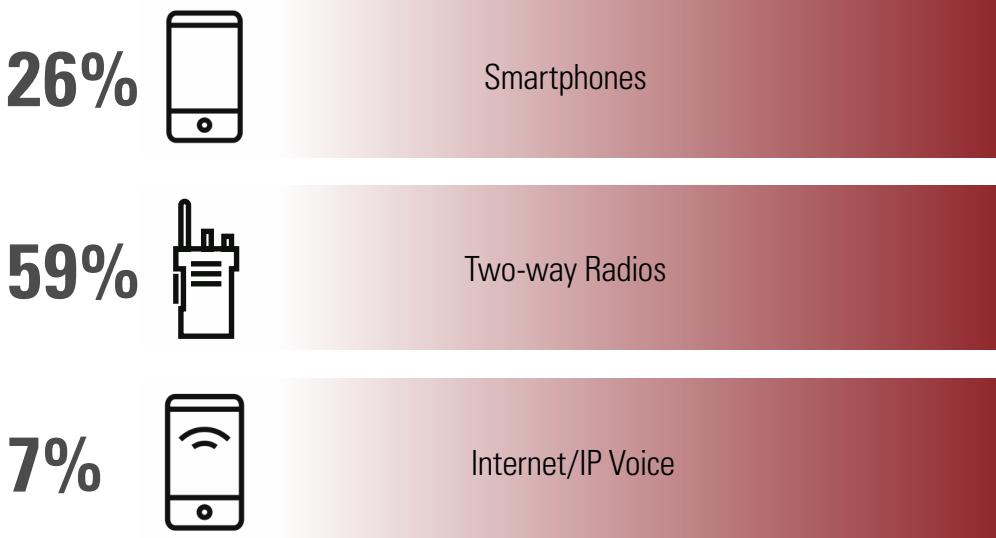
- Less than 50 employees
- 51-100 employees
- 101-500 employees
- 501 - 2500 employees
- 2501+ employees

RISE OF SMARTPHONES HIGHLIGHTS NEED FOR SMARTER, MORE CONNECTED DEVICES

In 2019, hospitality workers cited either smartphones (32%) or two-way radios (58%) as their primary communications device. This year, those percentages remain roughly the same, with smartphones now cited by 26% of respondents as their main form of voice communications vs. two-way radios at 59%. Internet/IP Voice-enabled devices were selected as the primary source of communication by 7% of respondents.

These numbers reflect the continued demand across all sectors for next generation devices with 'smart functionality' that enable workers to easily and quickly communicate while also using apps to accomplish dedicated tasks. Hospitality, however, requires both functionality and durability. That's why the ideal communications device for this sector may be a type of hybrid device: a rugged, reliable two-way radio that offers the features and data capabilities of a smartphone.

PRIMARY FORM OF VOICE COMMUNICATIONS



MOTOTRBO™ ION SMART RADIOS: GO ALL ON

The MOTOTRBO Ion smart radio is the first business-ready rugged communication device with all-on voice and broadband data capabilities. It enables you to stay connected across networks and devices, unify business-critical data and workflows, and ensure the capabilities your workforce needs to be at their best are always on.

[LEARN MORE](#)



75% - The number of workers using more than one device on the job.

PROLIFERATING DEVICES STRAINS INTEROPERABILITY

Nearly half of survey respondents have transitioned to digital two-way radios. An additional 16% are using a mix of digital and analog. Digital adoption is set to continue to increase, with 50% of those still using analog indicating they will be switching to digital in the next 12 months and another 20% of analog-users intending to switch within five years. This highlights an acceleration in digital adoption from 2019, when only 60% of respondents planned to make the transition within five years.

Digital radios offer better voice quality, stronger coverage, and longer battery life. Yet, the move to digital is about more than performance. With digital radios, manufacturers can access a range of integrated applications, analytics, and communications capabilities that transform operations. Today's digital radio applications include a universe of options for video and security, dispatch, work ticketing, and many more solutions that enhance security, efficiency, and productivity.

WAVE™ AND THE TLK 100: BUILT FOR THE JOB

The WAVE™ two-way radio allows for rapid reliable deployment anywhere the job takes you. Communicate instantly across platforms, networks, and between radios and smartphones. With nationwide push-to-talk, you can bridge with sister resorts, venues, and operations without needing to set up or maintain complicated infrastructure.

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DEVICE DURABILITY AND RELIABILITY STILL A TOP CHALLENGE

The hospitality industry's unique work environments make device reliability particularly important for safe, efficient operations. Any interruption to instant communication can put workers, guests, and facilities at risk. So, it's no surprise that the three most cited communication challenges were coverage, device reliability, and audio quality.

Proactive radio maintenance continues to be critical in preventing operational disruptions and downtime. This includes staying on top of software and feature updates and fixing any issues before they become emergencies. Maintenance service subscriptions can help transfer the burden of maintenance to a competent third-party.

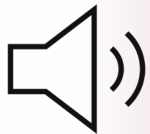
TOP COMMUNICATIONS CHALLENGES



Coverage



Durability / Reliability



Audio Quality and Volume

PROTECT YOUR RADIOS FROM UNEXPECTED DOWNTIME

To keep you safe and connected, your radios and infrastructure need to be kept up-to-date and protected. Essential Services include premium features that ensure continuous security, performance and enhanced functionality of your radios and infrastructure. With Premier Services, you transfer radio operations to our experienced managed services professionals to reduce your risks and maximize radio performance.

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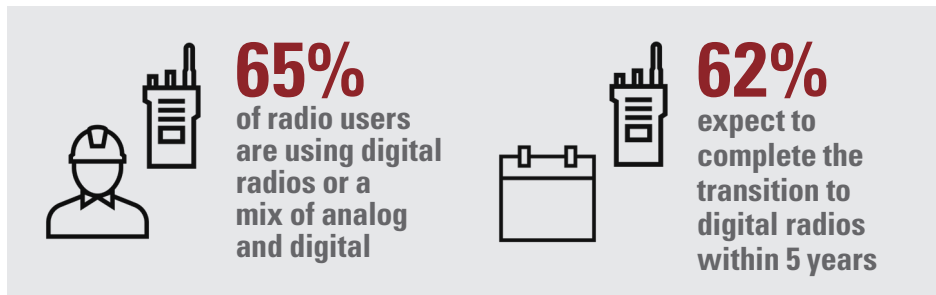
DIGITAL TWO-WAY RADIOS BECOME THE NORM

About 38% of survey respondents have transitioned to digital two-way radios. An additional 27% are using a mix of digital and analog. Digital adoption is set to continue to increase, with 20% of those still using analog indicating they will be switching to digital in the next 12 months and another 42% of analog-users intending to switch within five years. This highlights an acceleration in digital adoption from 2019, when only 13% of respondents planned to make the transition within five years.

Digital radios offer better voice quality, stronger coverage, and longer battery life. Yet, the move to digital is about more than performance. With digital radios, hospitality professionals can access a range of integrated applications, analytics, and communications capabilities that transform operations. Today's digital radio applications include a universe of options for video and security, dispatch, work ticketing, and many more solutions that enhance security, efficiency, and help create more positive guest experiences.

More than half of analog radio users intend to transition to digital in the next 5 years.

DIGITAL VS. ANALOG TWO-WAY RADIO USE



ADVANCING HOSPITALITY'S TOP PRIORITIES WITH NEXT-GEN TECHNOLOGY

Digital radio offers powerful advancements for hospitality industries. But it is only the beginning. There are a host of new communications systems and integrations that will improve hospitality's ability to enhance efficiency, productivity, and, most importantly, worker and guest safety.

When asked to name the top priorities for their communications systems respondents cited protecting staff and customers with safety features as the most important. Yet, they assigned nearly equal importance to instant voice communication, reaching workers no matter where they are on site, and durable and intelligent accessories for communication devices, which are all critical to supporting both people and productivity in the workplace.

TOP COMMUNICATIONS TECHNOLOGY PRIORITIES



Protecting staff and customers with safety features



Instant voice communication



Reaching workers anywhere on site



Durable and intelligent accessories for communication devices



Connecting workers on any device and network



REIMAGINING SAFETY AND SECURITY

Whether at the front desk or at the far corners of your business's grounds, the best defense against incidents is a good offense. From video security and analytics to artificial intelligence, technology is helping staff do their jobs more safely by proactively addressing issues before they become larger problems. That's why adoption of security technology is on the rise. Approximately 40% of hospitality organizations already have access control technology and the other half plan to add this capability in the next five years. Similarly, video security is already in use by 63% of respondents, with another 42% planning to adopt it in the next five years.

Video analytics are currently used by only 22% of respondents, making this a likely growth area in the years ahead. As advances in artificial intelligence and analytics transform video security, they are providing unprecedented visibility and insight using less resources. Additional advances enable integration between video security and communications technology, enabling real-time alerts to unfolding incidents sent directly to the devices your teams use most. Early adopters are detecting threats earlier, minimizing incident response time, preventing incidents, and maximizing the value of other security investments.



TECHNOLOGY FOR A SAFER WORLD

We believe that safety, efficiency, and productivity are deeply interrelated. That the technologies that make us safer can also make us better at everything we do. We've made that vision real by creating the first ecosystem to unify the technologies that keep us safe on one single platform—voice, video, data, and analytics.

[LEARN MORE](#)

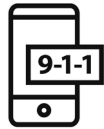
REIMAGINING EFFICIENCY AND PRODUCTIVITY

As the hospitality industry rapidly evolves and operations become more complex, workers require a range of features and applications beyond voice communications to keep pace. When asked to select the top three radio features that would improve workplace operations and day-to-day efficiency, respondents most cited the addition of text to speech, Bluetooth connectivity, and enhanced privacy. Interest in Bluetooth and text to speech, specifically, more than doubled from 2019 to 2021.

MOST DESIRED RADIO FEATURES



Wi-Fi Connectivity



Emergency Call



Bluetooth Connectivity



Lone Worker



Text to Speech

When it comes to applications that would improve operations and efficiency, respondents cited work order management, followed by indoor location tracking, and barcode scanning. Voice communications remain the cornerstone of a safe and efficient workplace, but these additional features and applications are giving manufacturers an unprecedented edge when it comes to streamlining and improving operations.

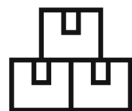
MOST DESIRED APPLICATIONS



Indoor Location Tracking



Fleet and GPS Location Tracking



Inventory Tracking & Management



Work Order Management

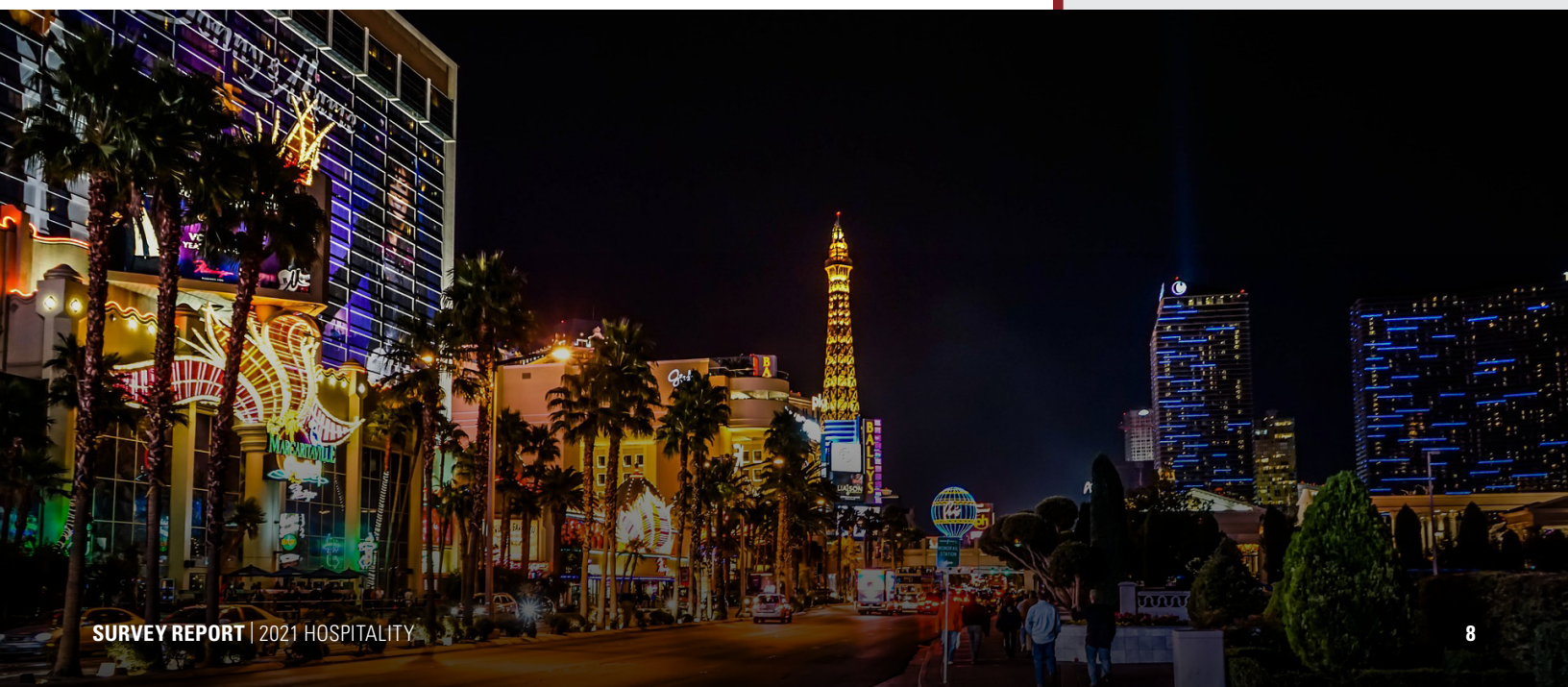


Workforce Management

A UNIVERSE OF APPLICATIONS AT YOUR FINGERTIPS

Motorola Solutions digital radios have access to a universe of applications, including many purpose-built for manufacturing and your unique business needs. Find applications for dispatch, work orders, ticket management systems, and more.

[LEARN MORE](#)





NETWORK COVERAGE STILL A TOP BARRIER TO THE CONNECTED WORKPLACE

A more connected workplace requires reliable communications and data across every level of operations. Yet, 71% of respondents say that coverage is still their number one network challenge (up from 65% in 2019).

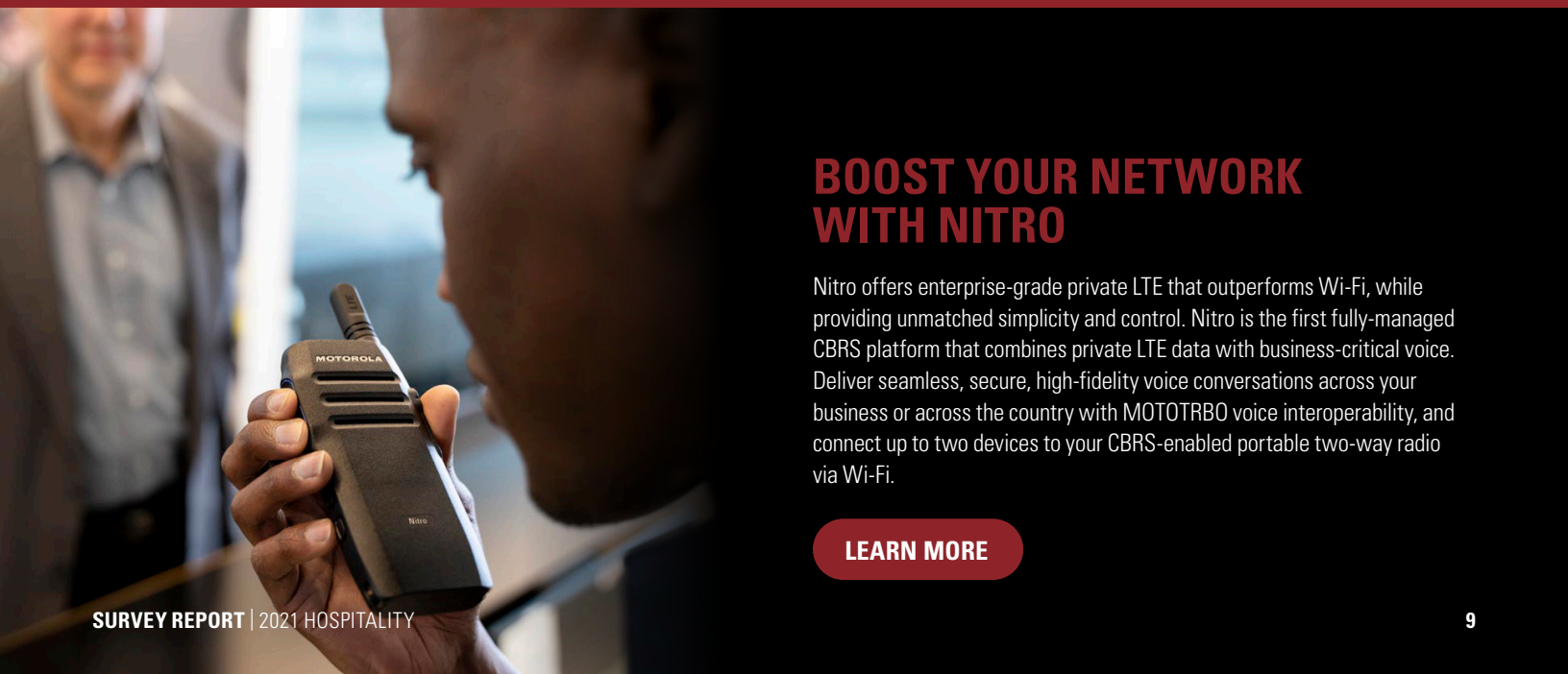
Nearly all (93%) hospitality workers have experienced connectivity issues, with 45% saying they have trouble getting or staying connected to the network on a daily or weekly basis. That leaves IT focused more on connectivity issues than strategic technology goals that matter most to the business.

71%

of respondents cite coverage as their #1 network challenge.

45%

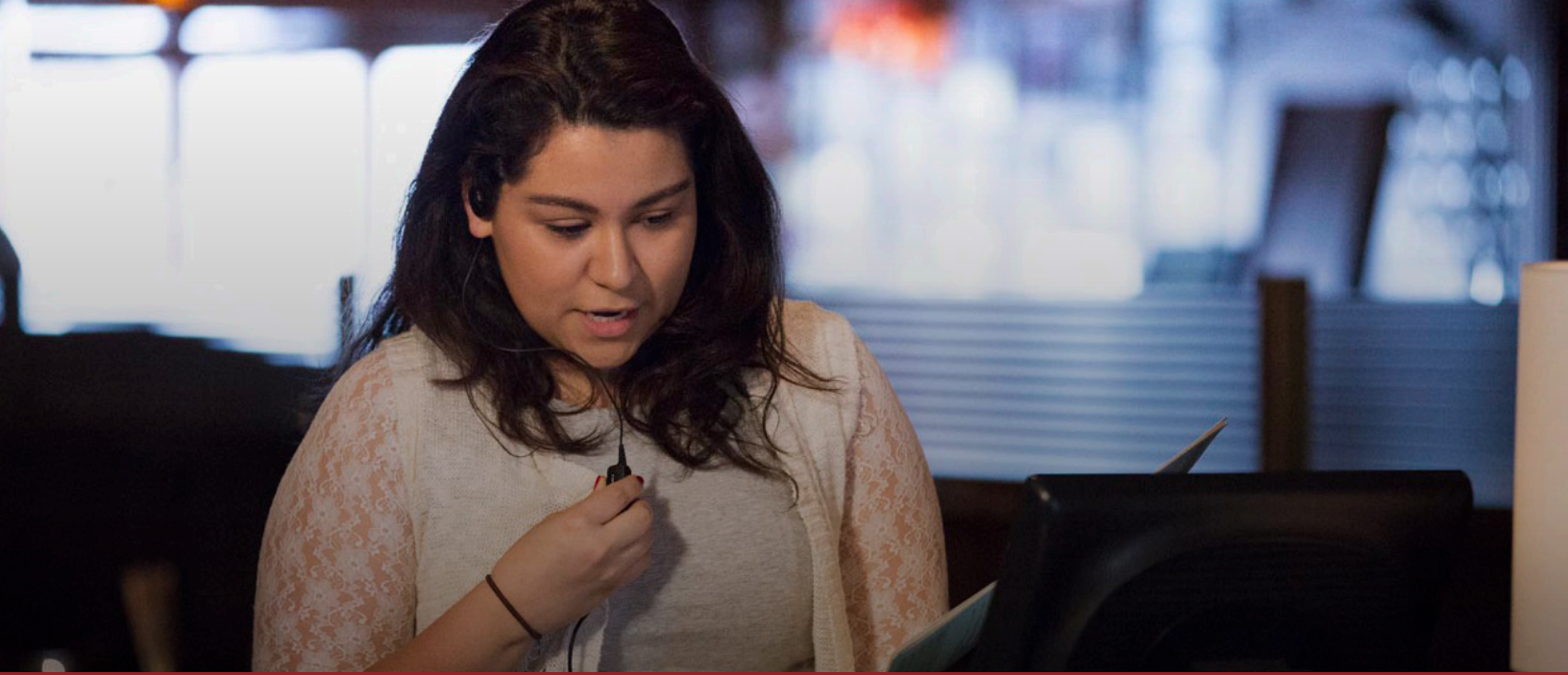
of respondents experience connectivity issues daily or weekly.



BOOST YOUR NETWORK WITH NITRO

Nitro offers enterprise-grade private LTE that outperforms Wi-Fi, while providing unmatched simplicity and control. Nitro is the first fully-managed CBRS platform that combines private LTE data with business-critical voice. Deliver seamless, secure, high-fidelity voice conversations across your business or across the country with MOTOTRBO voice interoperability, and connect up to two devices to your CBRS-enabled portable two-way radio via Wi-Fi.

[LEARN MORE](#)

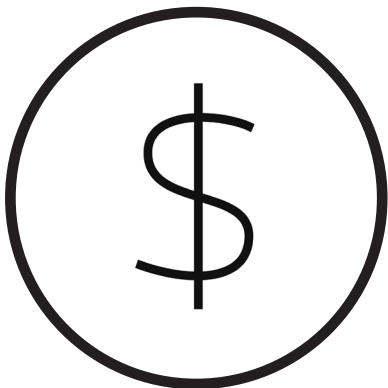


LACK OF RESOURCES HINDERS IMPROVEMENTS TO COMMUNICATIONS TECHNOLOGY

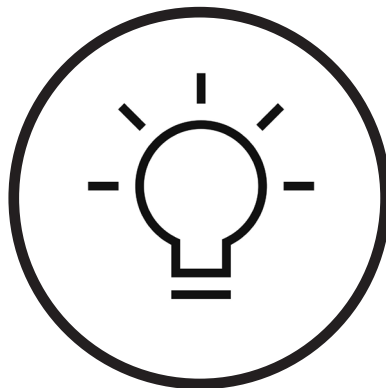
Technology's ability to transform safety and enhance the guest experience holds exciting promise for hospitality. Yet, the majority of survey respondents listed a few common constraints to improving communications and security technology including budget challenges, limited knowledge of available technology, and lack of personnel.

The key to solving these challenges will be finding ways to do more with less, and integrated technology can play a key role by streamlining operations and boosting productivity. Increasing safety while reducing incidents also helps optimize limited budgets. In addition, building a unified communications ecosystem can be implemented over time and structured to take advantage of a facility's existing infrastructure.

TOP 3 CHALLENGES TO IMPROVING COMMUNICATIONS AND SECURITY TECHNOLOGY



Budget Issues



Limited Knowledge of Available Technology



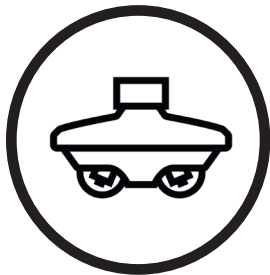
Staffing Challenges

TODAY'S NEW NORMAL

In the wake of the global COVID-19 pandemic, hotels, resorts, and other entertainment venues are facing new and unprecedented challenges. Providing a safe and enjoyable experience for guests while operating efficiently to keep costs down is still a top priority, but now many must make changes to operational procedures with stricter health guidelines in place, capacity limits, and possibly less staff. Many consumers are still hesitant to make travel and recreation arrangements, but when they decide to stay at your hotel or visit your property, how are you planning to help guests feel safe, secure, and comfortable while visiting?

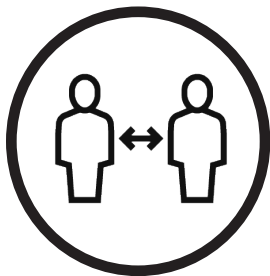
As technology becomes more interconnected to all areas of business, many hospitality businesses have taken advantage of this time to evaluate their technology systems and business operations. Of respondents surveyed, 64% say their business has seen an increase in adaptability to new technologies. Additional safety adaptations respondents plan to implement long-term focus on keeping staff and guests safe, including daily deep cleanings (51%), exposure contact tracing (24%), and occupancy limits (19%).

Today, effective communications in hospitality is a critical requirement. The Motorola Solutions end-to-end technology ecosystem helps break down communications technology silos with a range of AI and analytics-enhanced solutions. With safer, more efficient operations, you receive a clear competitive edge today and a strong foundation for future growth, no matter what tomorrow brings.



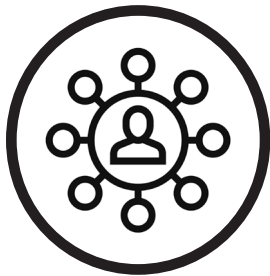
PREVENT RISK OF CONTACT

Limit occupancy rates by using AI analytics on video security cameras, and identify if people are wearing masks as well as assisting in upholding social distancing guidelines.



PROTECT GUESTS AND STAFF

Deter public aggression toward essential service workers and front-line workers by using body-worn cameras.



RESPOND

Use contact tracing using Access Control Manager to identify where individuals who are infected have been and respond according to your facility standard practice.

Find more health resources available through Motorola Solutions on our website.

[**LEARN MORE.**](#)



THE NEW ERA OF SEAMLESS CONNECTIVITY: BRINGING HOSPITALITY COMMUNICATIONS INTO THE FUTURE

For hospitality, guest and worker safety, efficiency, and productivity are tightly connected goals, all of which rely on seamless connectivity. As the hospitality industry further embraces advances in technology and the increased automation and intelligence it promises, companies have the opportunity to meaningfully advance all three of these goals.

The 2021 Motorola Solutions Hospitality Survey highlights that forward-looking professionals are looking to unify voice, data, video, and analytics across devices, people, and locations. They understand that a solid foundation of seamless communications and data gives them a real competitive edge today, one that is likely to only grow in the years ahead.

To learn more and explore how we're bringing hospitality communications into the future, visit:

www.motorolasolutions.com/hospitality



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