

# Mapping the future of Hotel and Restaurant experience

A European Survey on International Guests' expectations



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# Background and objectives

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While facing a growing competition from alternative accommodation and food experience types provided to international visitors, **the hotel & restaurant industry innovates and constantly needs to adapt to the new consumer paradigm.**

In this context, HOTREC asked TCI Research to assess the current **competitiveness of European hotels and restaurants' experience quality** based on guests' satisfaction, as well as to map **benefits that travelers would expect from their hotels and restaurants experience in the future.**

The reports is therefore divided into two parts:

- ▶ An **assessment of the hotel and restaurant guest experience in Europe**, based on the reference UNWTO endorsed TRAVELSAT Competitive Index survey: *overall quality, staff hospitality, value for money, diversity...* Is Europe hospitality competitive vs global competition? Which source markets are mostly satisfied or at risk? Which European destinations offers the best experience?...
- ▶ A **mapping of future guests' expectations about hotel and restaurant experience**: which consumer benefits should the industry deliver tomorrow for attracting more customers?

# Methodology, sampling and data collection

## Part 1: Assessing hotel and restaurant guest experience in Europe



- ▶ **Data source** : TRAVELSAT© *Competitive Index Survey*, the UNWTO Awarded global standard benchmarking destinations, travel industries and segments based on guest experience.
- ▶ **Custom analysis of 45 000+ observations in the world and 30 000+ in Europe** consolidating 2013-2016 data for 100+ destinations and 40+ outbound markets worldwide.
- ▶ European and global Indexes are weighted to reflect actual destinations' sizes in the total arrivals.
- ▶ Statistical significance for Total Europe Indexes: +/- 10 points (at 95% confidence level)



## Part 2: Mapping future hotel and restaurant guests' expectations

- ▶ **2000 specific interviews of international travelers** from **8 strategic outbound markets** to Europe: *UK, France, Germany, Netherlands, Spain, Italy, US and China* (223 to 254 interviews per market).
- ▶ Interviews occurred in **February 2017** on the TRAVELSAT© *Competitive Index Interviewing Platform* using **Computer Assisted Web Interviewing mode** on access panels.
- ▶ Statistical significance for market data: 20% +/- 5 points (at 95% confidence level)



# The Global Standard

## Measuring Visitor experience Quality

TRAVELSAT Competitive Index© is **the reference global survey endorsed<sup>(\*)</sup> by the UNWTO**. It offers an independent, standard and comparable measurement of visitor experience quality in 200 destinations, markets and travel segment, **covering the full visitor journey**.

*(\*) In 2011, TRAVELSAT Competitive Index won the prestigious UNWTO Ulysse Award for Innovation, recognizing the program excellence and relevance for destinations and tourism players.*



# TRAVELSAT©

## At-a-glance



### A survey endorsed internationally

By several tourism organizations (UNWTO, ETC, ECM, OLACT, CTO...)



### 80+ destinations using the program

Cities, Regions, Countries and travel players in Europe, Caribbean, North America, MEA, APAC and Indian Ocean.



### 60+ Indexes covering the full visitor journey

Accommodation, Transportation, Food, Cultural and Leisure activities, Shopping, Safety feeling, Digital hospitality, Landscape, Cleanliness, Price, Hospitality...



### 200+ destinations, markets and travel segments

Offering unrivalled geo-topic benchmarking possibilities on all segments of travelers.



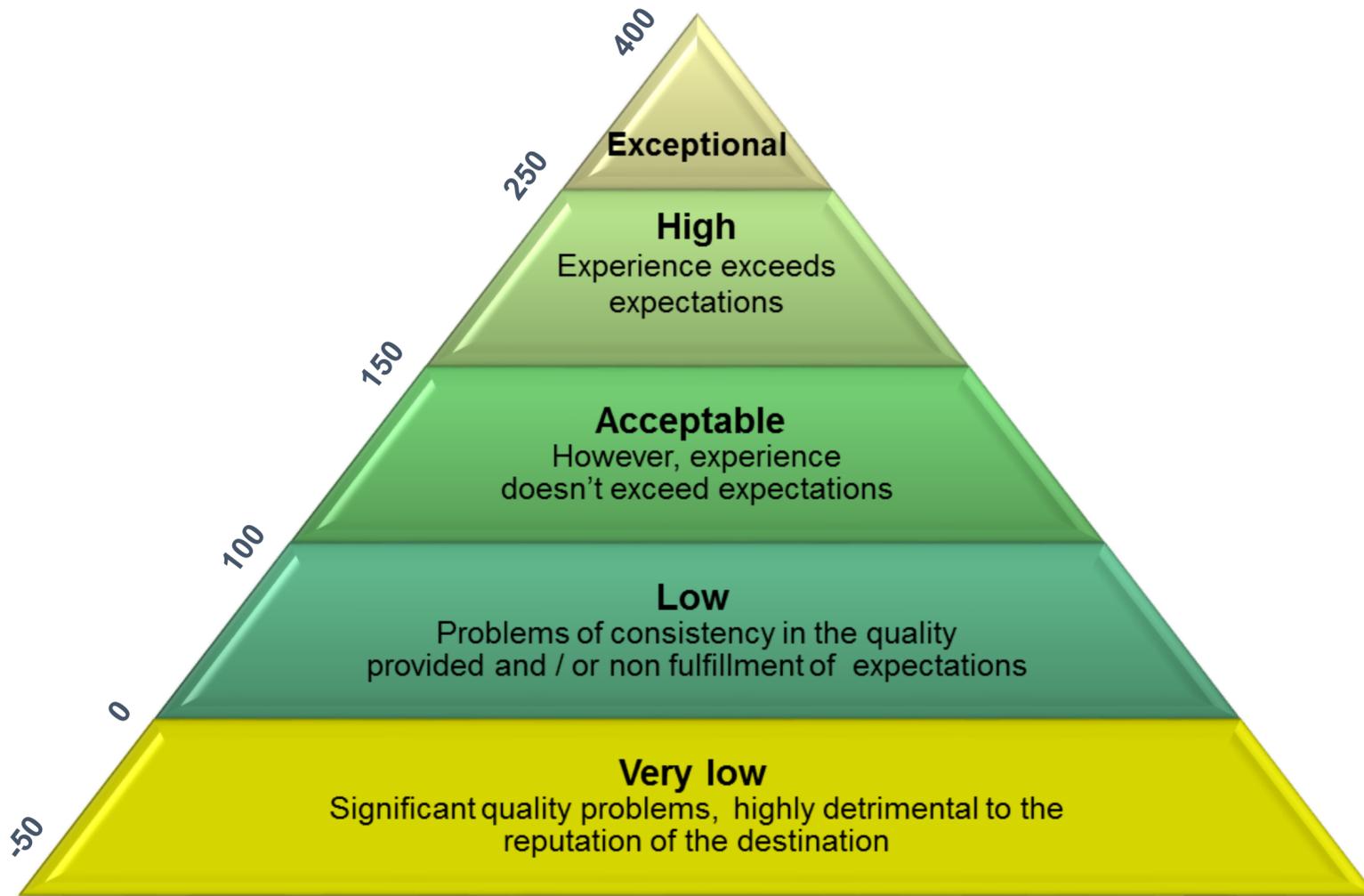
### A solid and independent methodology

Capturing reliable data on visitor experience, with detailed competitive performance metrics based on custom benchmarking norms.



# TRAVELSAT Competitive Index<sup>©</sup>

## Principles and definition



Indicative interpretation grid – How to read TRAVELSAT Competitive Index

- TRAVELSAT<sup>©</sup> applies a standard proprietary scoring from the 1 to 10 satisfaction rating scale used in the questionnaire.
- The index reflects the reputation impact associated with each grade and can usually fluctuate from -50 to 400.
- Scores from extremely satisfied or dissatisfied visitors likely to greatly influence the destination reputation are more valued in the scoring Vs arithmetic averages.
- The primary purpose of Indexes is to benchmark destinations' experience quality Vs norms and competition.



# Part 1: Assessing hotel and restaurant guest experience in Europe

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# Visitor experience is the first driver of destination attractiveness

Influencing 1 in 3 destination choice in Europe

What mostly prompt your decision to choose this destination? (Total Europe)



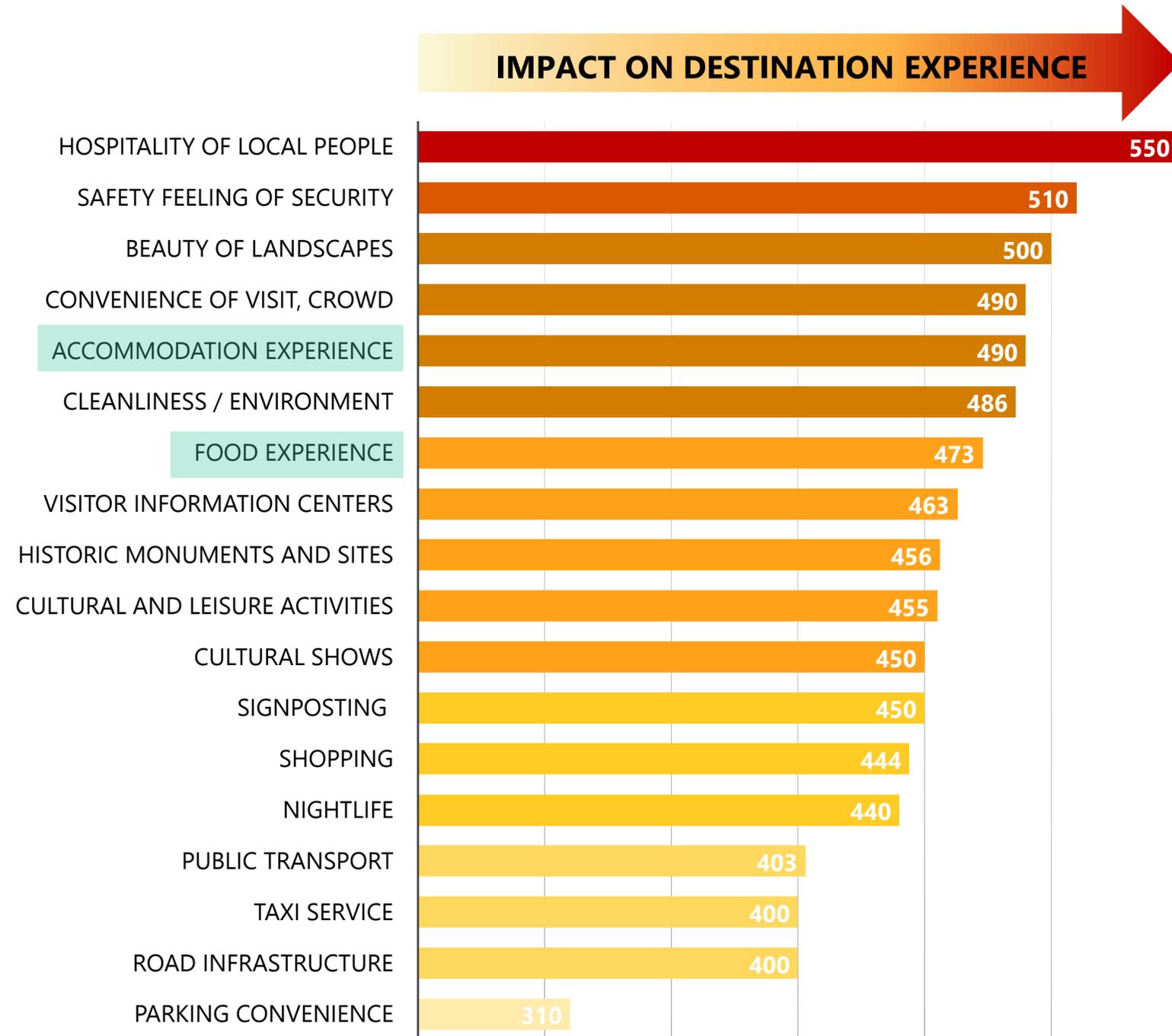
## A delighted visitor today...

- ... Recruits **new visitors tomorrow**,
- ... Shapes the **destination reputation**,
- ... is likely to **spend more**,
- ... and is more likely to **repeat visit!**

Base: First time visitors, all markets, all destinations in Europe

# Accommodation and Food strongly impact visitors' experience

TOP Factors influencing international visitors' experience



Essential pillars at destination!

Accommodation and local food **play a critical role in shaping international visitors' quality of experience** at a destination, along with other key influential tangible and intangible factors (safety, environment, locals hospitality...).

Correlation analysis to overall satisfaction – All markets – All European destinations

# The Hotel Experience in Europe



# ACCOMMODATION EXPERIENCE



Value for money competitiveness challenged by global competition...

Guests' experience with European hotels' overall quality and hospitality has been rated at satisfactory, which is in line with global competitive norms. However international visitors' perceptions of **value for money** remain significantly below the global average.

# Better quality generates higher satisfaction

## Variations per Hotel Categories

### Europe Quality Indexes according to the hotel category (\*)



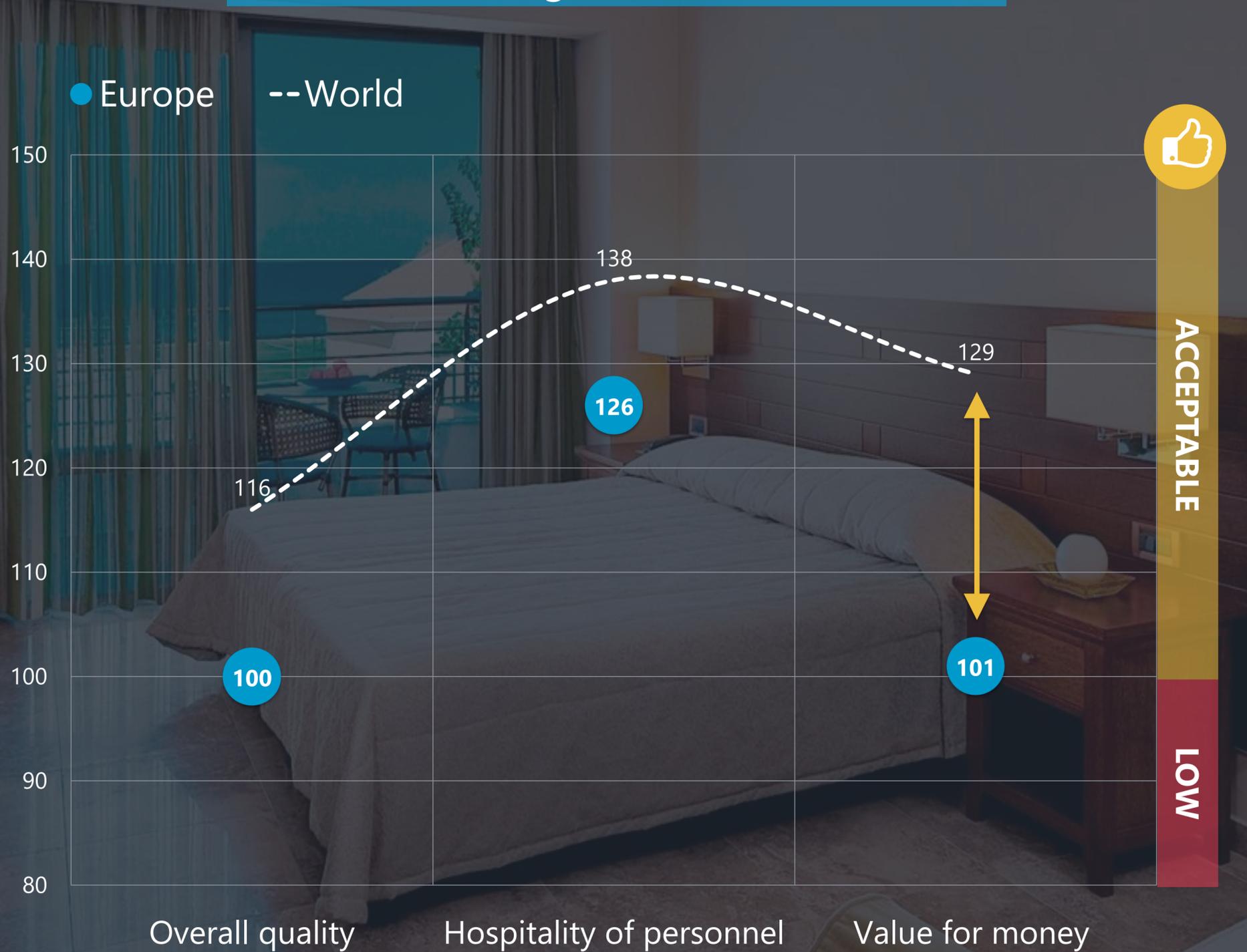
### European hotels able to meet all ranges of quality demand

Quality perceptions of hotels in Europe widely increase with the infrastructure category. The higher end hotels receive a more competitive rate of perception of quality than the mid-range or budget hotels, reflecting staff hospitality skill in welcoming luxury travelers.

(\*) Budget, practical hotels with a limited range of facilities and services  
Intermediate hotels with standard range of services and more formal hospitality  
Luxury hotels offering the highest quality of accommodation, facilities, services and hospitality

# ACCOMMODATION EXPERIENCE

## Budget Hotels (\*)



Budget hotels' competitiveness at risk!

Budget hotels in Europe **are the most "at risk" in terms of competitiveness.** The global competition provides higher levels of satisfaction on overall quality and staff hospitality, generating a **significant competitive gap in value for money perceptions.**

(\*) Budget, practical hotels with a limited range of facilities and services

# ACCOMMODATION EXPERIENCE

## Middle range Hotels (\*)



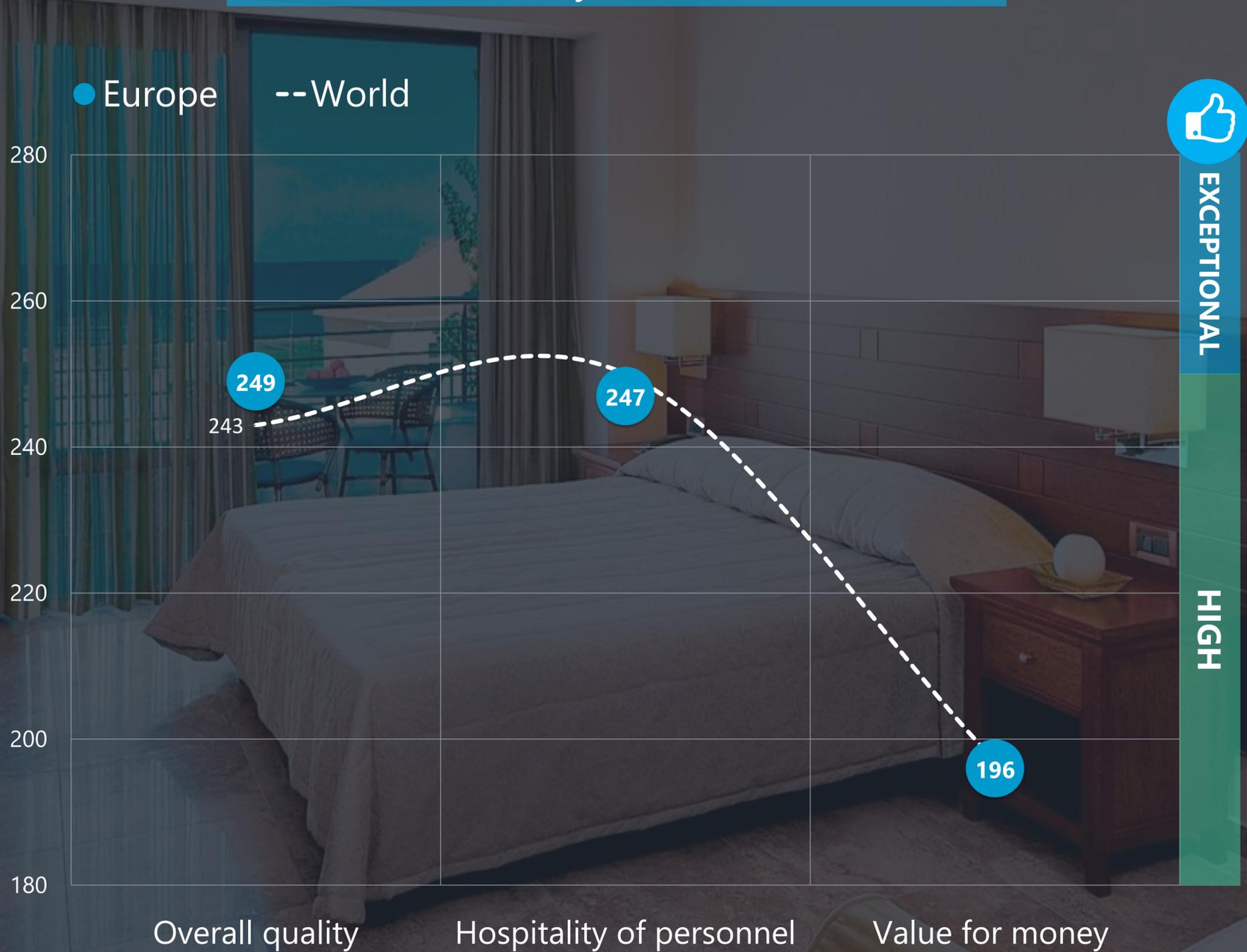
Middle range hotels stay firmly in the race

Mid range hotels, which are the most popular classification of hotels used by international guests, offers a **competitive experience in overall**, even if value for money perceptions are slightly rated lower vs norm.

(\*) Intermediate hotels with standard range of services and more formal hospitality

# ACCOMMODATION EXPERIENCE

## Luxury Hotels (\*)



Affluent visitors recognize  
Luxury hotels excellence

With very high Indexes in line with global norms, **Europe hotels offers a competitive experience to its luxury guests.** High-end hotels received excellent ratings, **including in terms of value for money.**

(\*) Luxury hotels offering the highest quality of accommodation, facilities, services and hospitality

# Hotel Quality Perception per Market

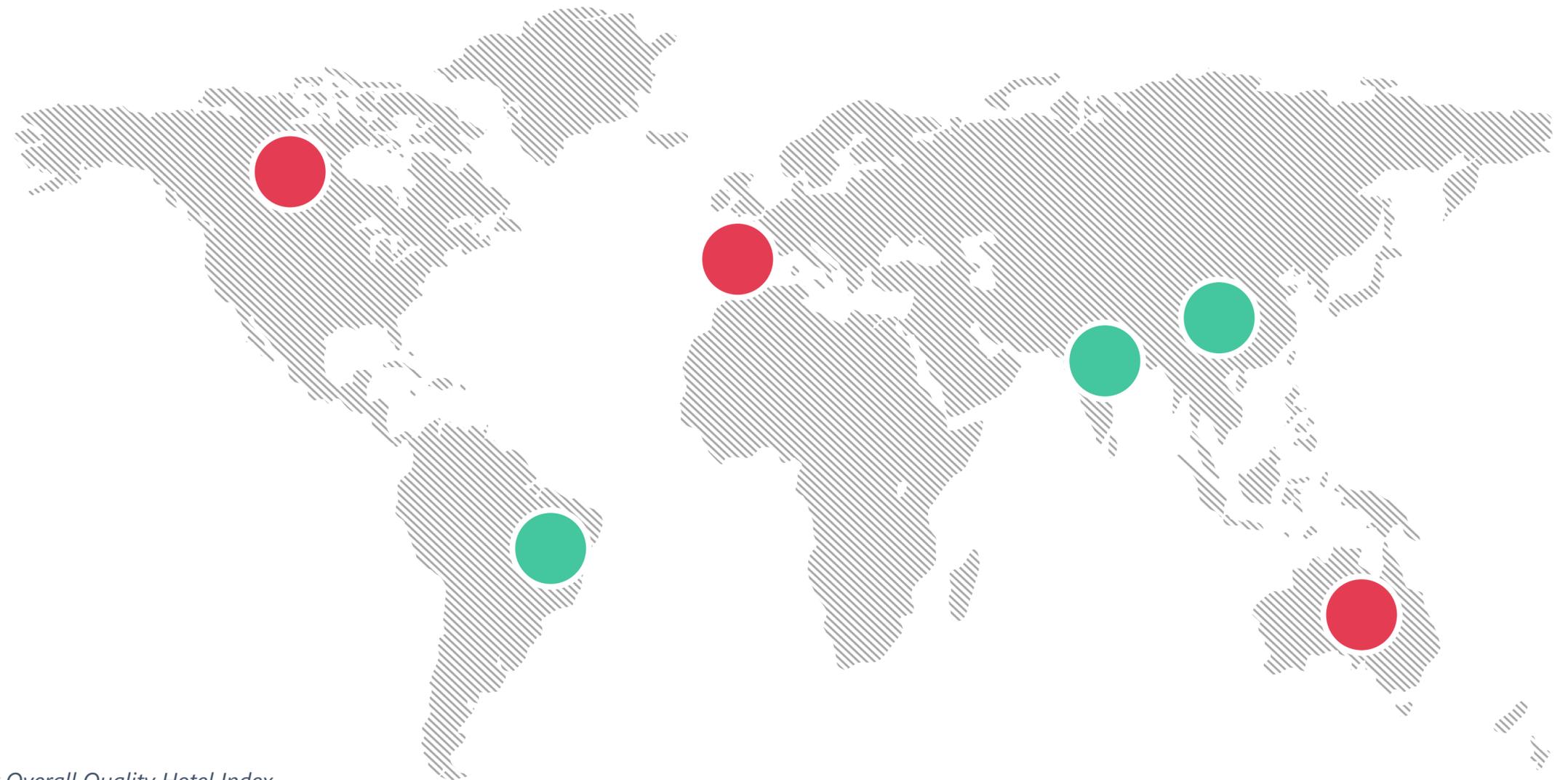
Who is Europe offering the best / lowest hotel quality experience to vs Global competition ?



TOP 3 Ambassadors	
Brazilians	+51 pts
Indians	+29 pts
Chinese	+13 pts



TOP 3 Detractors	
Spanish	-12 pts
Australians	-10 pts
British	-9 pts



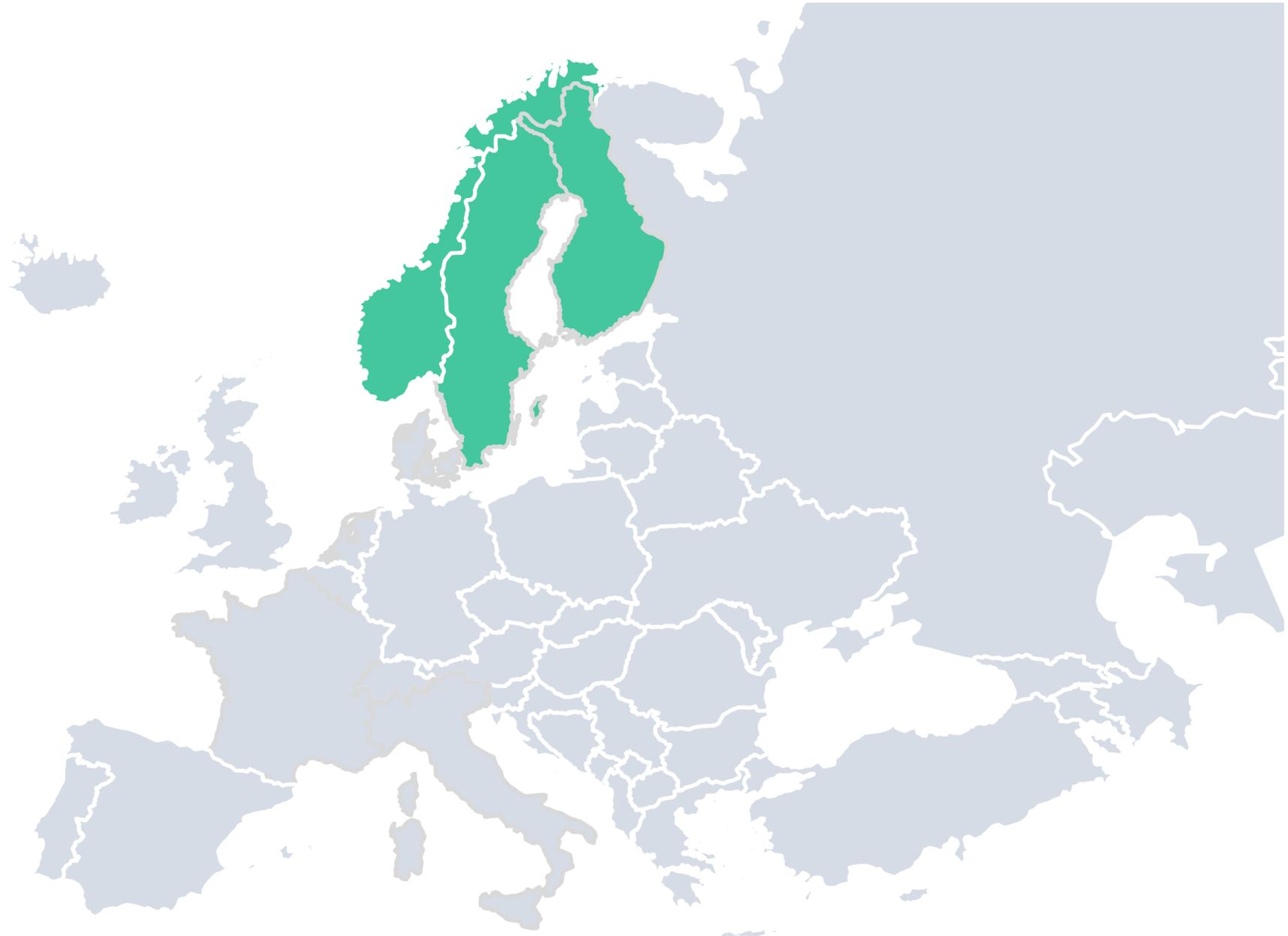
Competitive Index Gap Europe Vs Global competition for Overall Quality Hotel Index

European hotels are **particularly competitive on some key long-haul markets**, including fast-growing strategic China and India, but is outperformed by the global competition on some key intra-European markets (Spanish and UK).

# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Hotels Overall Quality"*

TOP 3 Destinations	Index > 200
Sweden	250
Norway	246
Finland	234



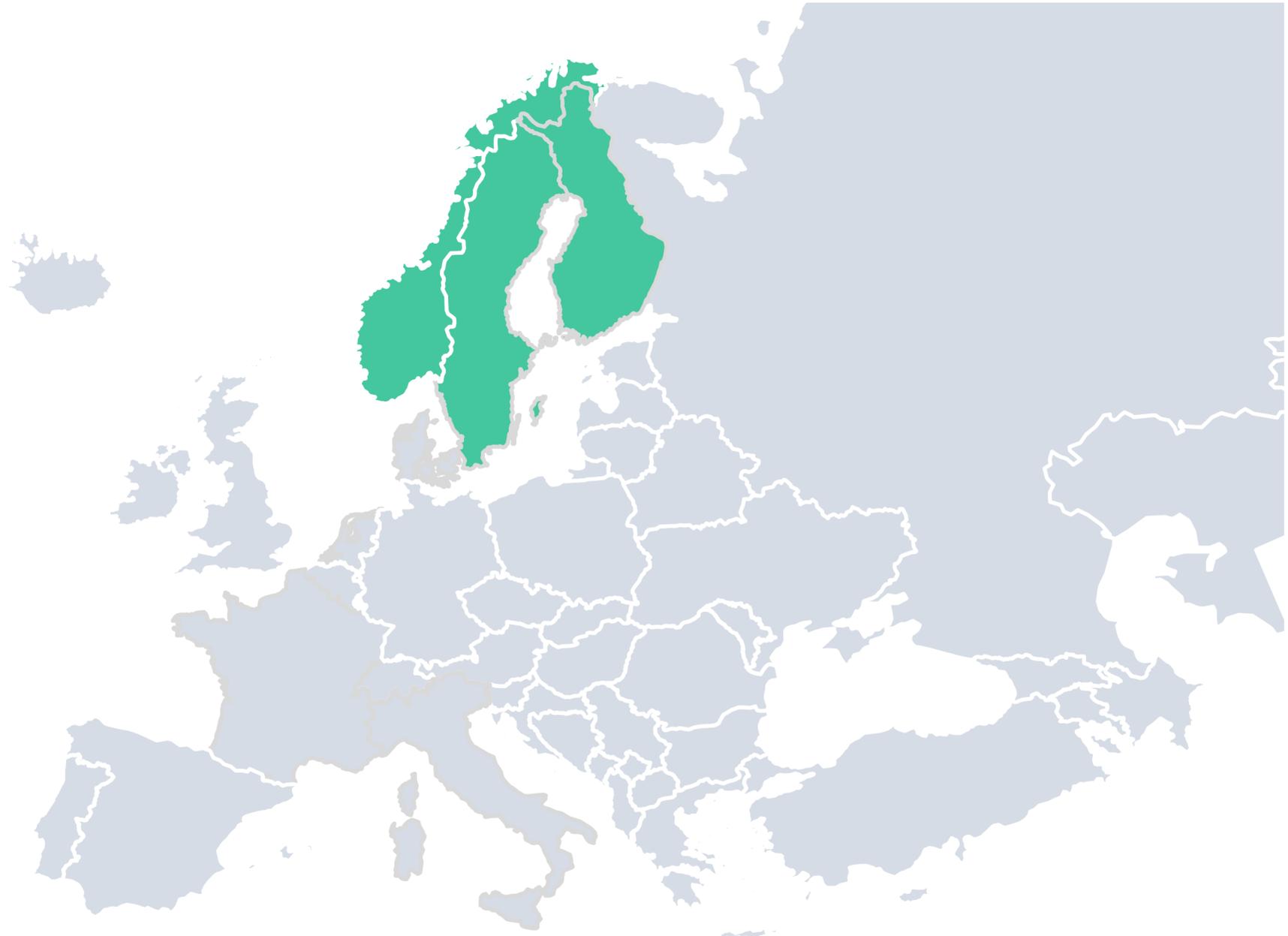
Nordics leading the race...

Despite operating in relatively expensive environment for visitors, hotels in Nordic destinations usually generate very positive overall quality rating.

# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Hotel Hospitality of Personnel"*

TOP3 Destinations	Index > 200
Norway	281
Sweden	266
Finland	243



Cold destinations... warm hospitality!

Hotel staffs are rated as highly hospitable in Northern Europe, particularly Scandinavia where best-in-class hospitable staff can be found.

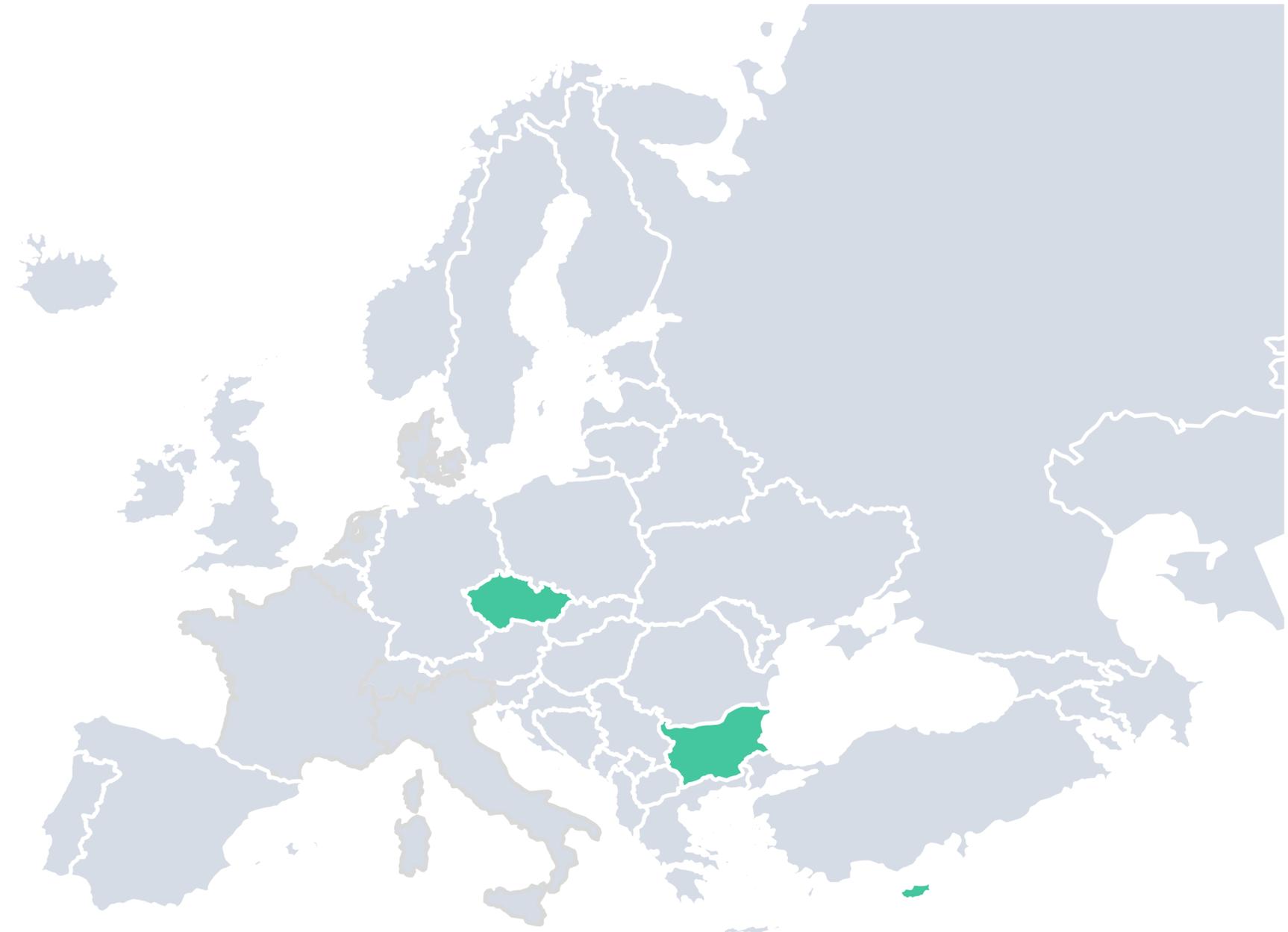
# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Hotels Value for Money"*

TOP 3 Destinations	Index > 150
Bulgaria	212
Cyprus	192
Czech Republic	188

## Eastern Europe drives value for money

Europe is also able to provide cheap yet valuable hotel experiences in some destinations, in particular those located in Eastern regions or remote islands.



# The Food Experience in Europe



# LOCAL FOOD EXPERIENCE



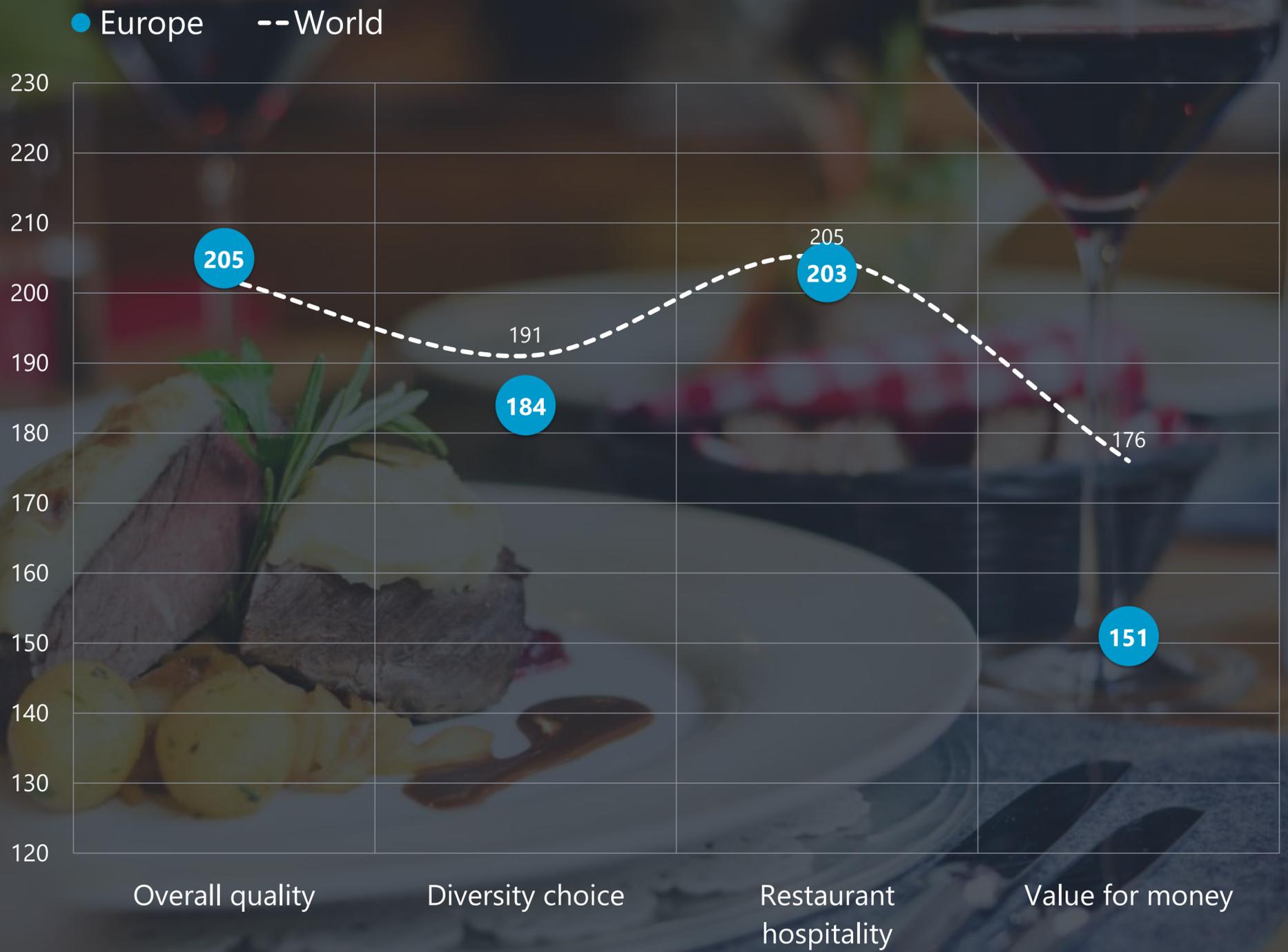
## Scope of progress needed in various facets of the food experience

While Europe offers a competitive overall food quality, it is **outperformed by the global competition on diversity perception and staff hospitality.**

These gaps weight on the regional **value for money competitiveness**, a challenge for the mainstream markets who generally look for “good food experience at a good price” during their stay.

# LOCAL FOOD EXPERIENCE

## « Food Tourists » segment



### Food Tourists segment delighted!

International visitors experience higher rate of satisfaction with Europe's **gastronomic activities during their stay** (fine cuisine restaurants, cooking classes, wine roads, farm to table experiences...).

By encouraging visitors to **explore more of the gastronomic diversity European destinations have to offer**, along with highest standard of staff professionalism, the hospitality industry would positively impact value for money perceptions.

# Food Quality Perception per Market

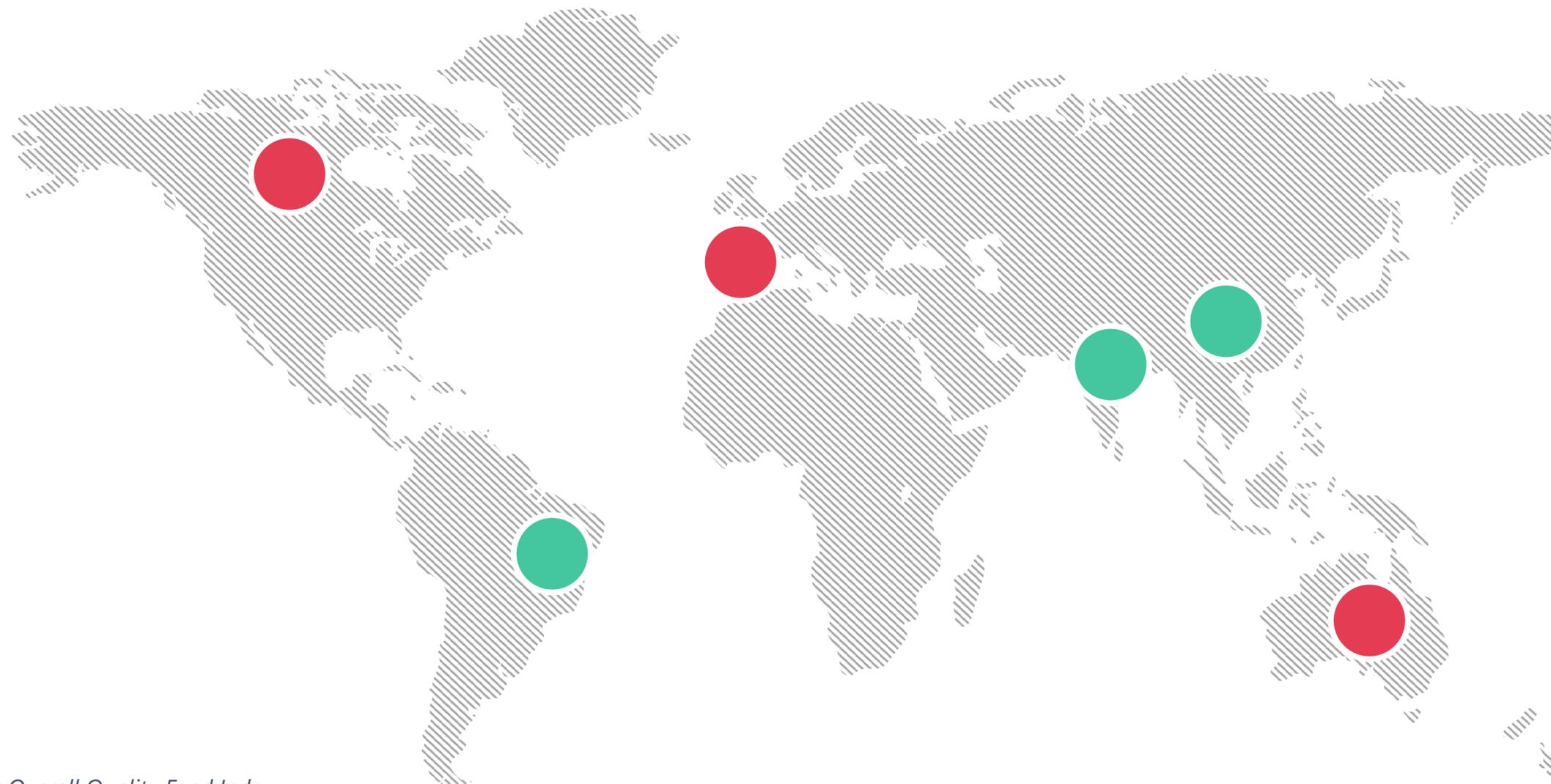
Who is Europe offering the best / lowest food quality to vs Global competition ?



TOP 3 Ambassadors	
Brazil	+27 pt
India	+25 pts
Russia	+11 pts



TOP 3 Detractors	
Australians	-29 pts
Spanish	-18 pts
French	-17 pts



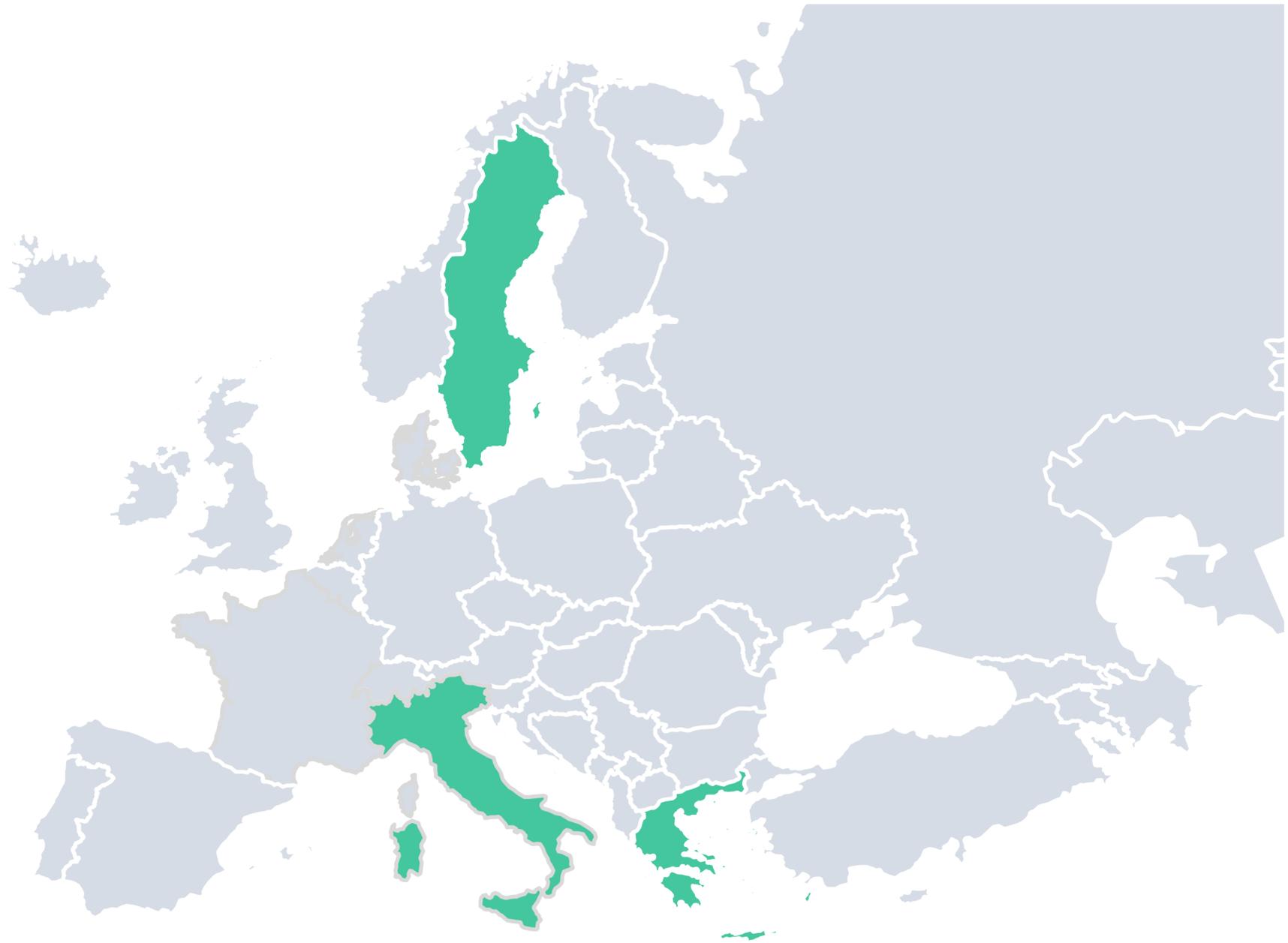
Competitive Index Gap Europe Vs Global competition for Overall Quality Food Index

As for hotels, several **long-haul markets particularly enjoy local food in Europe**, while some European visitors tend to prefer food experiences outside Europe.

# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Local Food overall quality"*

TOP 3 Destinations	Index > 180
Sweden	197
Italy	192
Greece	191



## Usual suspects and New players

In addition to Mediterranean food, which traditionally enjoys a positive reputation, more recent players like Sweden are now driving excellent visitors' culinary experiences too.

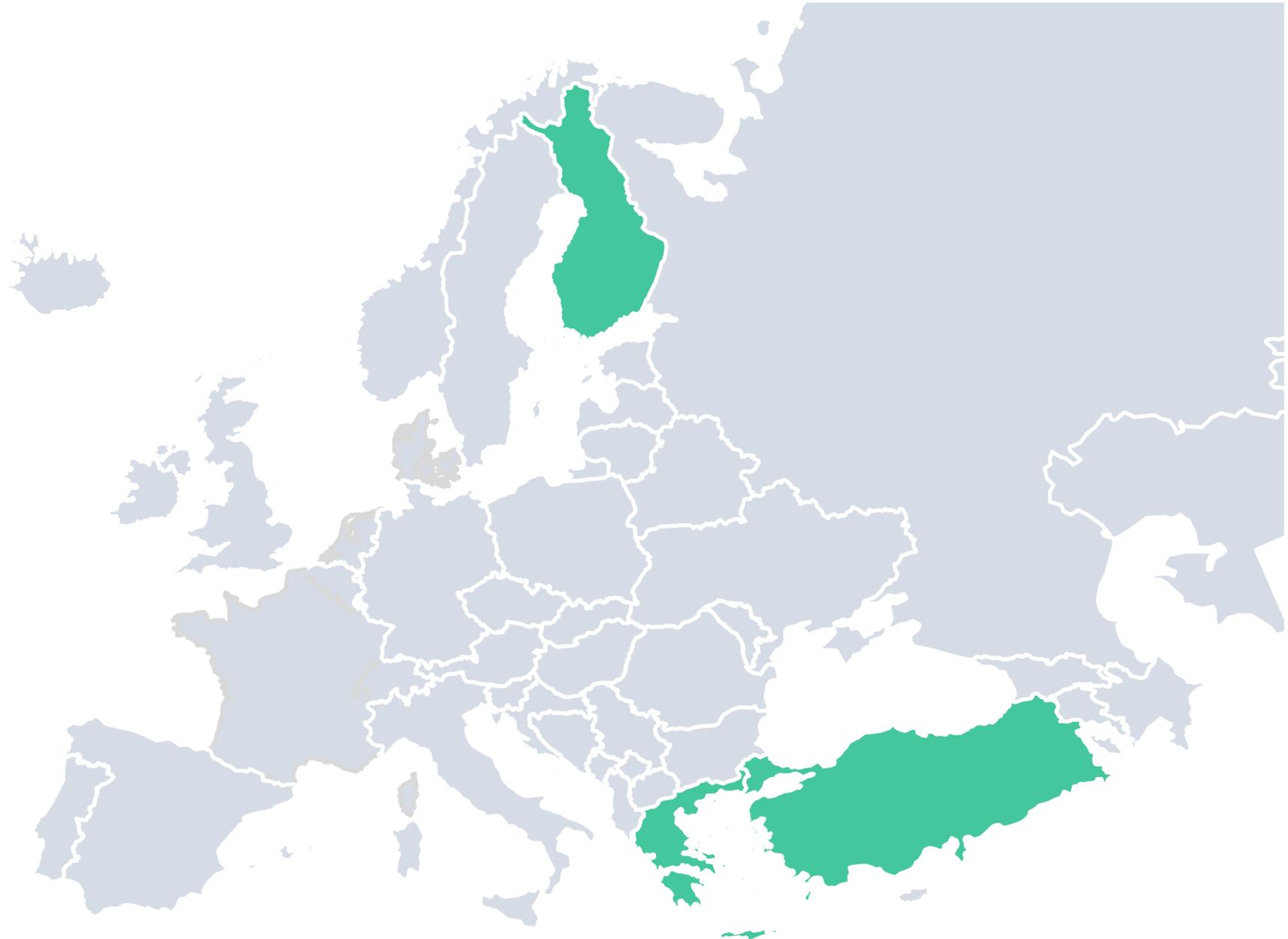
# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Local Food Diversity"*

TOP 3 Destinations	Index > 150
Turkey	176
Finland	171
Greece	160

## Diversity from South to North

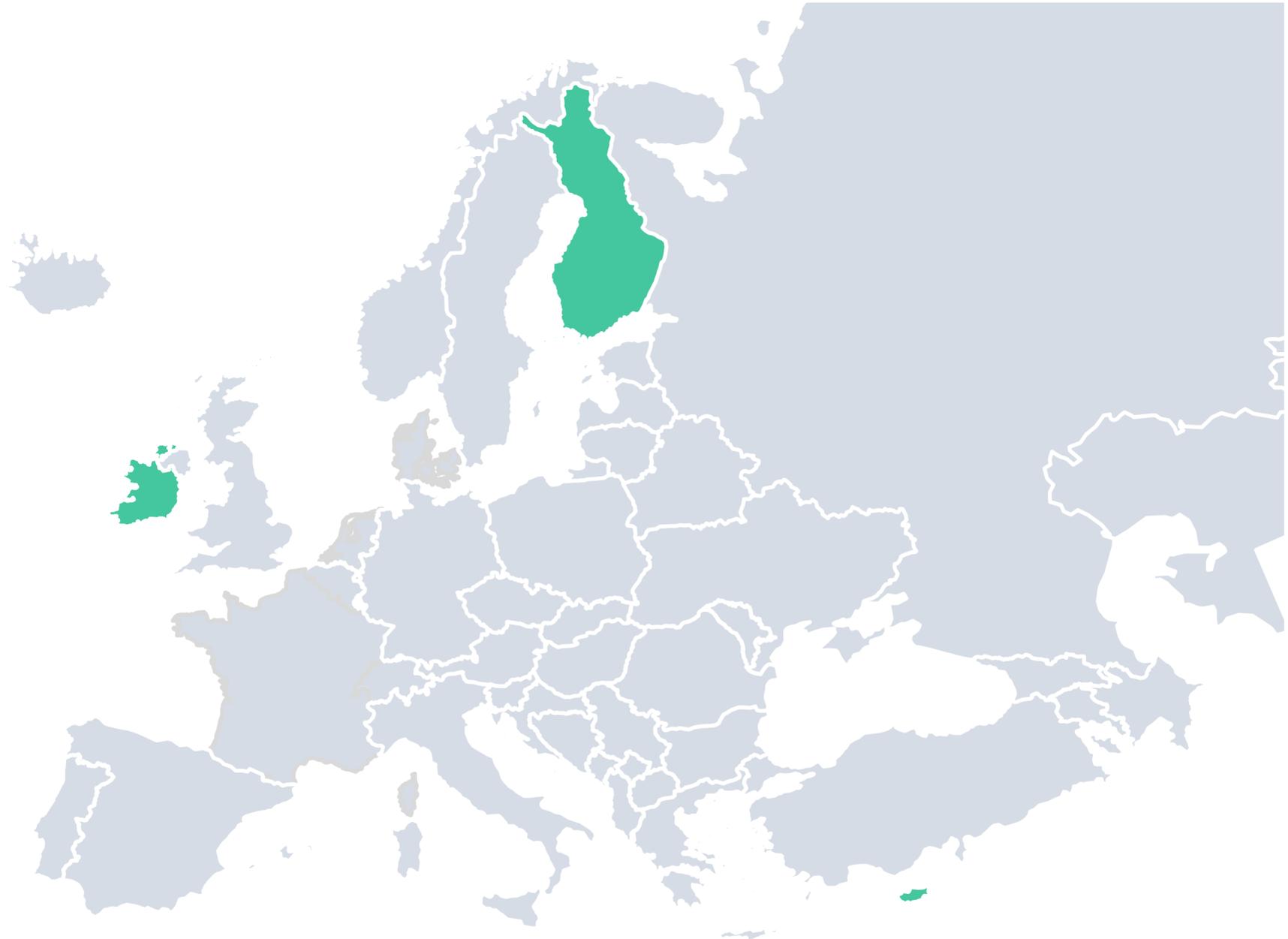
Destinations in both the South and the North of Europe offer a diversity in food. This shows that food perceptions are subjective and not a fixed characteristics of a region.



# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Restaurants staff hospitality"*

TOP 3 Destinations	Index > 200
Finland	223
Cyprus	223
Ireland	205



## Hospitality of different kinds

The profile of destinations offering best-in-class restaurant staff hospitality reveals that a genuine and efficient service can come in different forms, reflecting European diversity of experiences.

# Best-in-Class Destinations

TOP 3 Ranking in Europe for *"Local food Value for money"*

TOP3 Destinations	Index > 200
Bulgaria	229
Poland	207
Turkey	204

## Affordable quality food experiences

Eastern European destinations have good capabilities to provide positive culinary experiences to their international visitors at very affordable cost, which offer competitive advantages for attracting families and budget travelers.



# Quality Assessment Summary

*While offering of good guest experience quality, European hotels and restaurants must face a tough global competition...*

European hotels and restaurants provide their international guests with **a satisfying quality experience overall**. The region offers a wide range of options from budget to premium lodging and food experiences, with several destinations exceeding consumers' expectations located in various geographical positions.

However, **value for money perceptions in Europe remain at risk on the global scene**, both in lodging and food experiences, particularly among budget travelers or visitors with no particular motivation for taking gastronomic activities during their stay.

## Key Competitive Challenges

To be taken up by European Hotels and Restaurants



### Budget hotels competitiveness “at risk”

Practical and affordable hotels rating are lower compared to the global average, while the budget travelers segment is dramatically growing internationally.



### Focusing again on the mainstream markets

While many long-haul markets in Europe are delighted, some intra-European volume markets report better experience outside Europe than inside.



### Improving quality consistency across Europe

Quality, Price and Value perceptions greatly vary across Europe and Markets, making it difficult for visitors to experience a consistent quality when traveling in the region.



### Not all visitors are Foodies...

Europe seems competitive in delighting Food Tourists, but does not rival the global competition for delivering value for money food options to the “mainstream”.



### Increasing level of hospitality for impacting value

By adapting hospitality and services to the new consumer paradigm disrupted by collaborative and peer-to-peer platforms.



# Mapping future international Hotel & Restaurants Guests' Expectations

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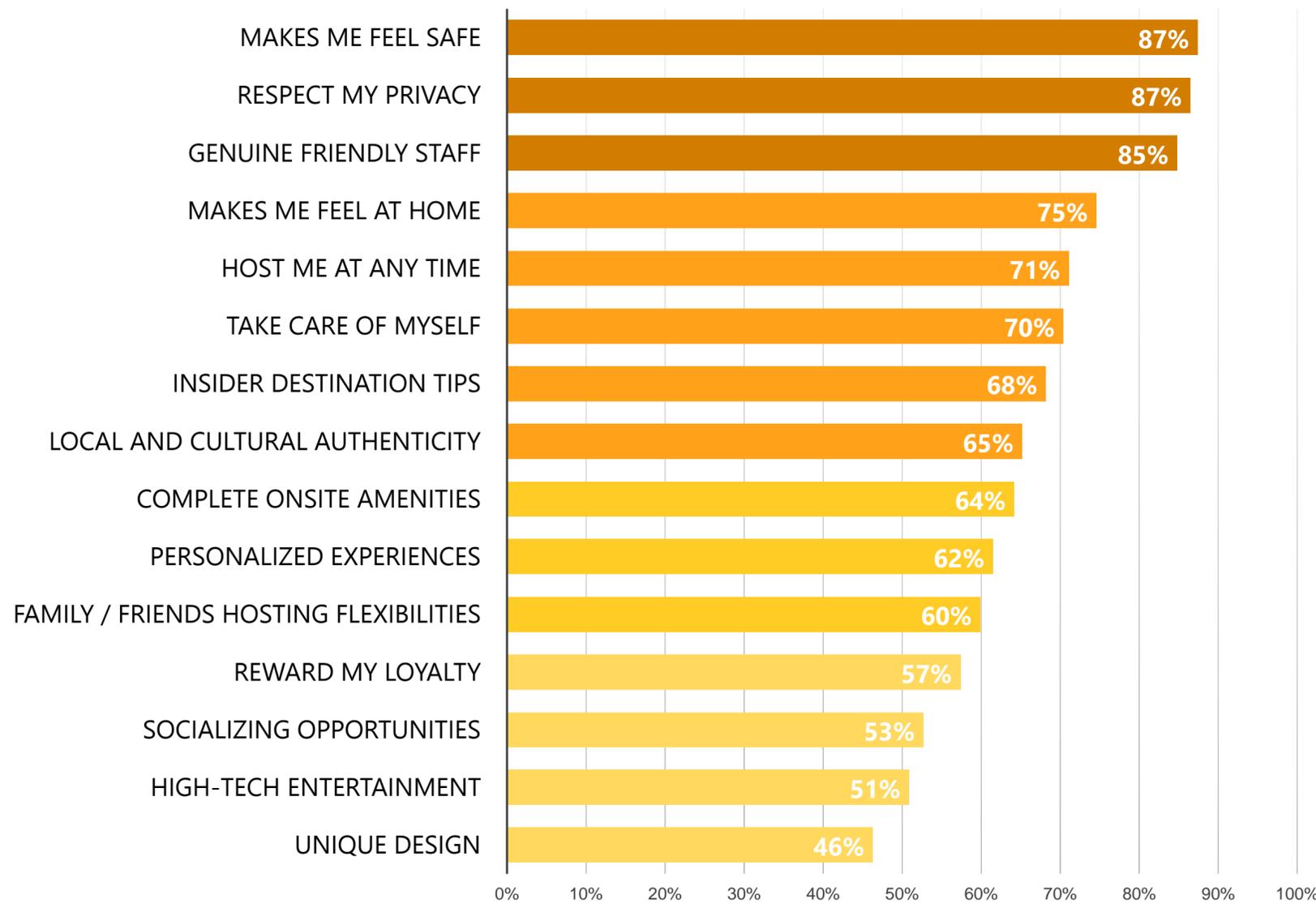
# What ideal experiences are expected from hotels in the future?



# Defining the Ideal Hotel Experience for Tomorrow

TOP Consumer Benefits expected from Hotels in the future

*What ideal experience would you expect from a hotel in the future?*



% of scores 1+2 on an importance rating scale from 1 to 5

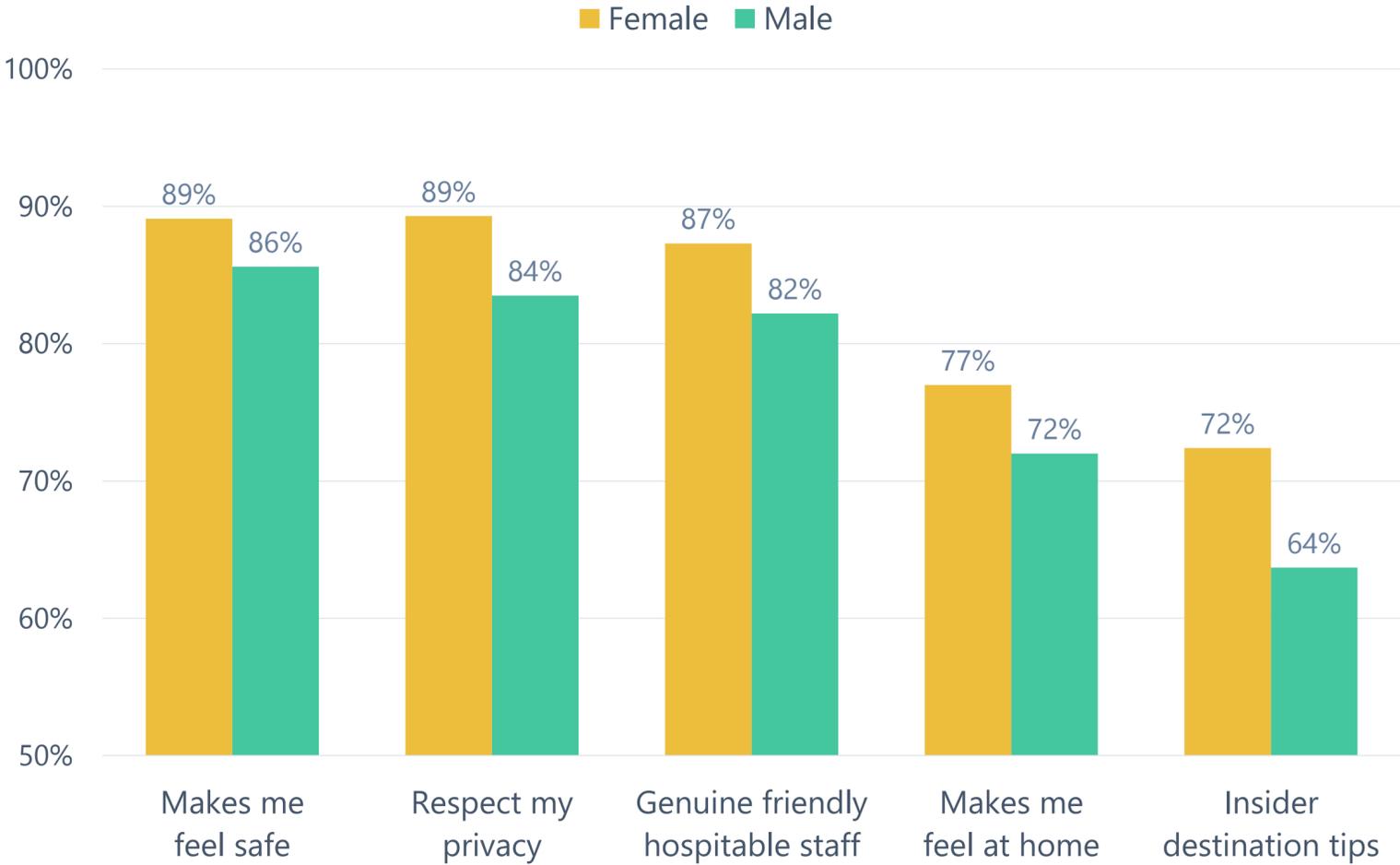
A peaceful retreat for increasingly anxious travelers... and more!

Reflecting global opinion trends, benefits expected from hotels in the future polarize around the concept of **a safe retreat that respects privacy, offering a truly genuine and hassle-free, flexible sense of hospitality.** Once these features are provided, guests are **ready to explore, socialize and be entertained.**

# Addressing Gender-specific Needs

A focus on female guests' expectations

What female guests expect in particular from hotels tomorrow...



% of scores 4+5 on an importance rating scale from 1 to 5

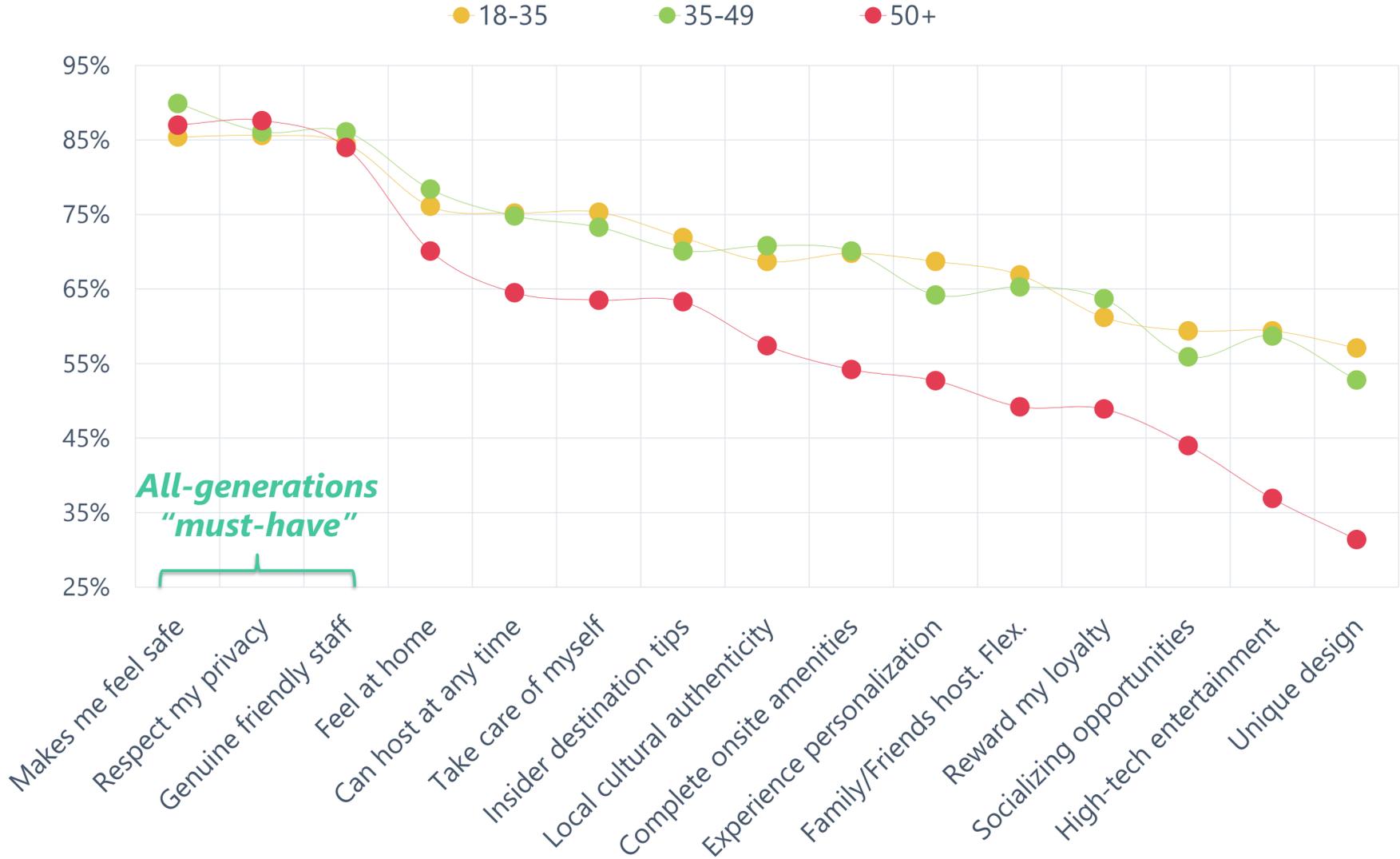
Cocooning inside,  
Exploring outside!

Female guests express more than males the need for finding a **perfectly safe place respecting their intimacy**. They also expect **more insider tips for exploring the destination**.

# Addressing Generational-specific Needs

Generational shift requires adaptation

What generations expect from hotels tomorrow...



All-generations "must-have"

### Millennials expect much more from hotels than Boomers

While safety, privacy and staff hospitality have become common essential pillars for all-age guests, **younger generations are expecting much more from their hotel experience** compared to their elders: more amenities for some (incl. flexibility for hosting friends or families), more digital and high-tech entertainment or unique design for others...

% of scores 4+5 on an importance rating scale from 1 to 5



# Addressing Market specific Needs

UK Travelers

What British expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

Exceeding expectations on the "basics"

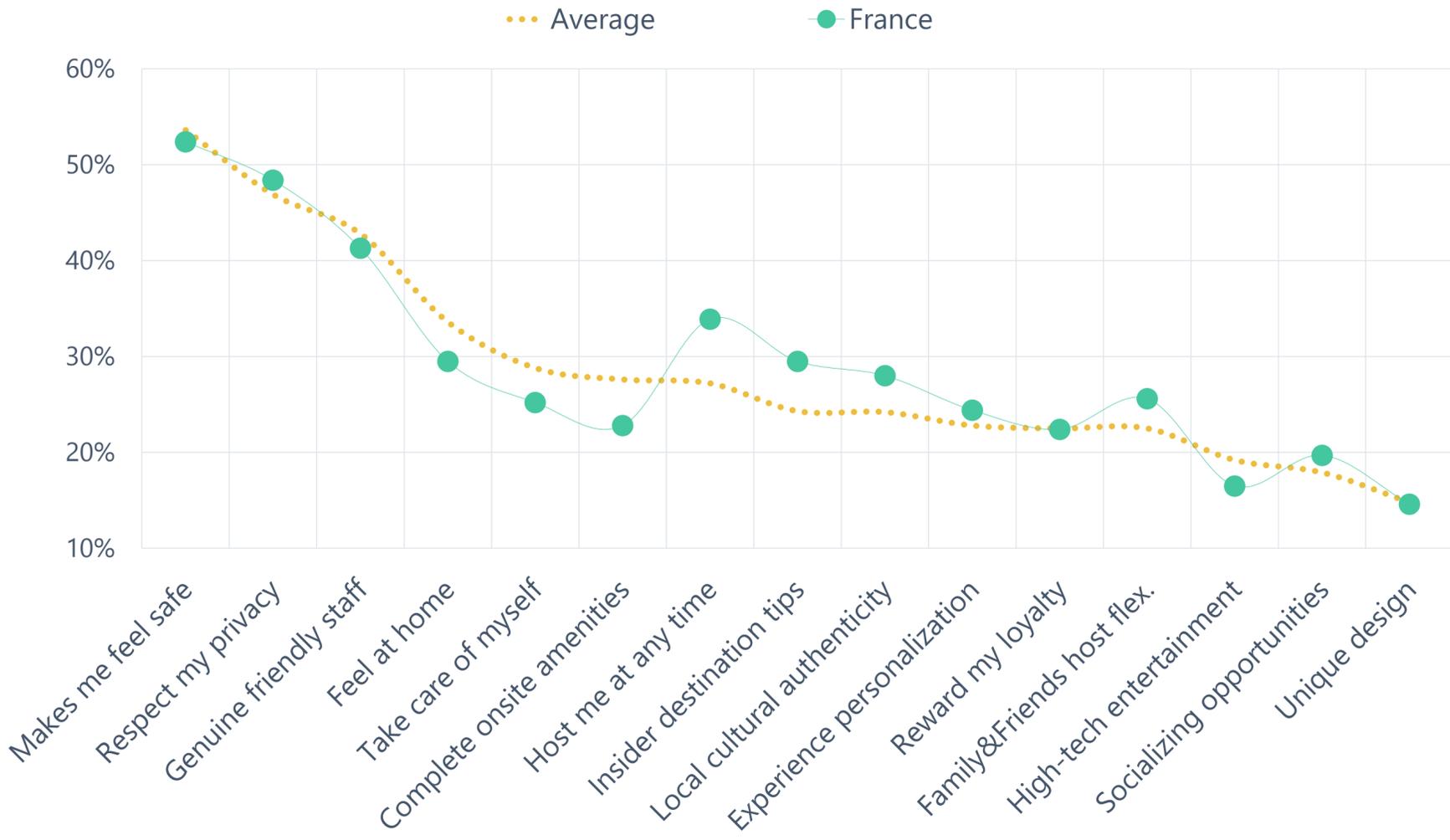
**Safety, privacy** and **staff hospitality** are the main British expectations on future hotel experiences.



# Addressing Market specific Needs

## France Travelers

What French expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

### Hosting flexibilities and authenticity

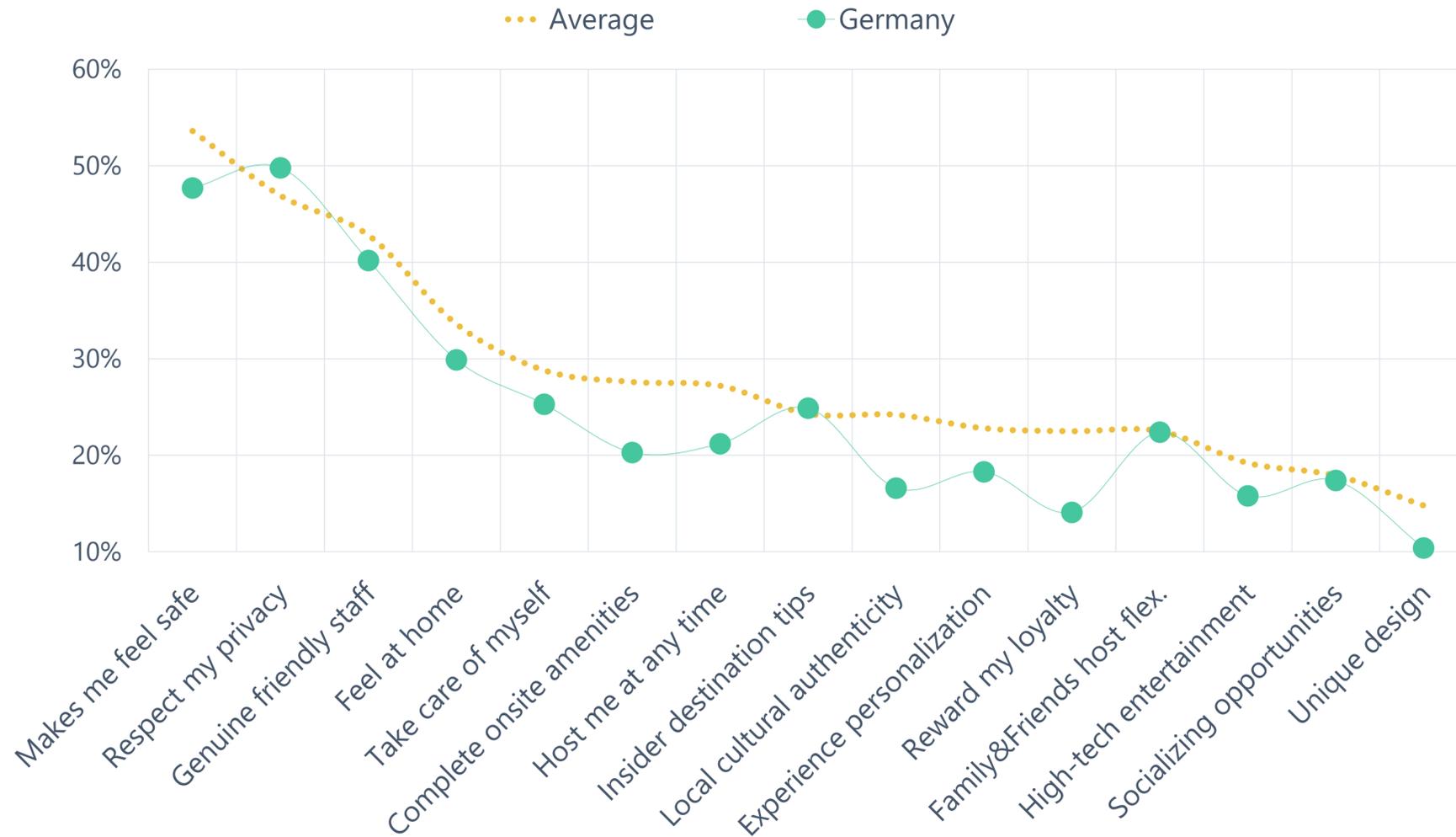
The French would expect more flexibilities from hotels in the future, with options for **adapting various time constraints** or **families-friendly hosting amenities**. Their appetite for **discovering local authentic places** is also stronger than average.



# Addressing Market specific Needs

## German Travelers

What Germans expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## Privacy and destination Tips

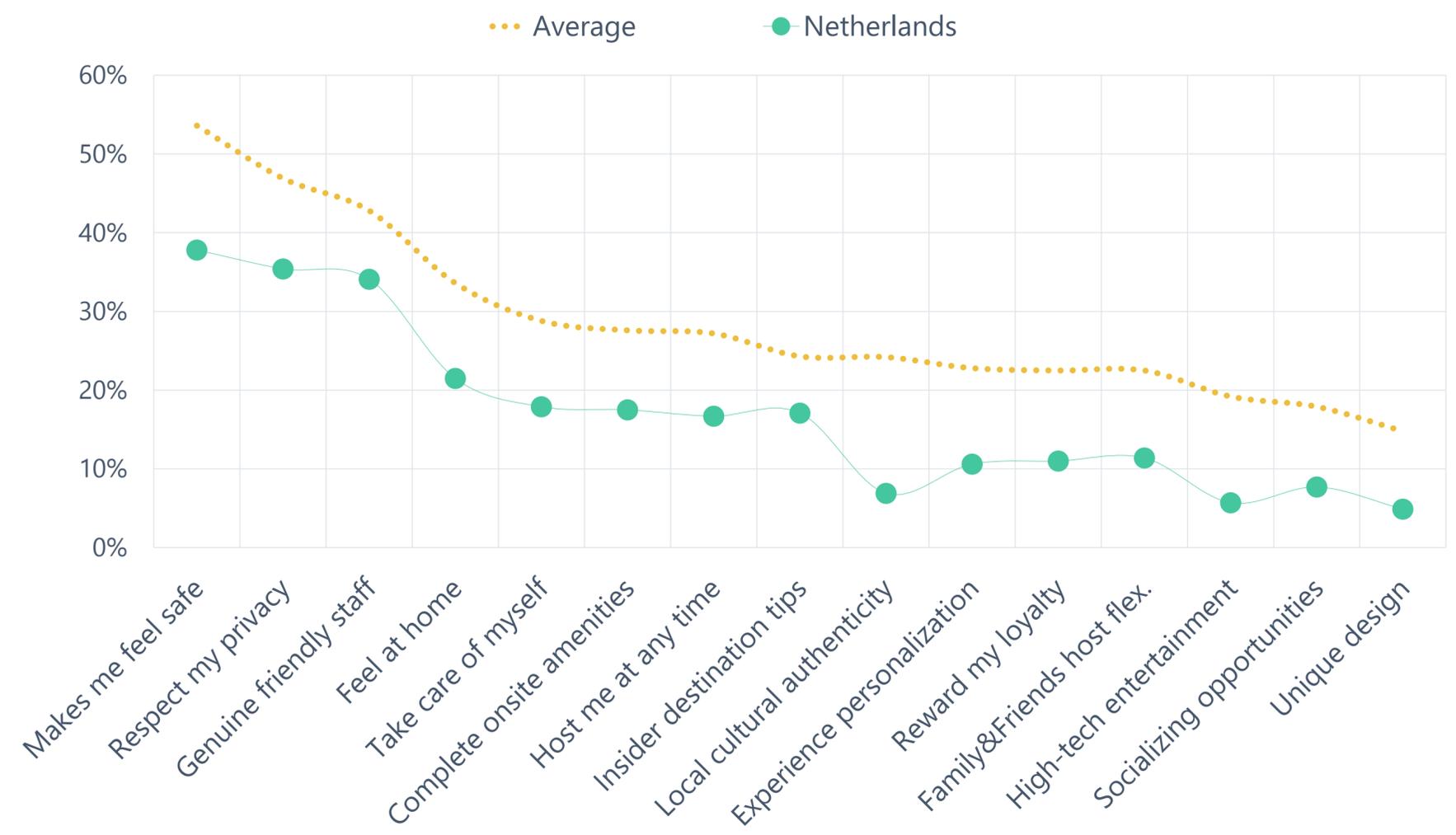
**Privacy** is essential to German guests hotel experience in the future. Moreover, **tips for discovering the destination** as well as **family or friends hosting flexibilities** are also highly rated importance criteria.



# Addressing Market specific Needs

## Dutch Travelers

What Dutch expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

### Staff genuine hospitality before local authenticity

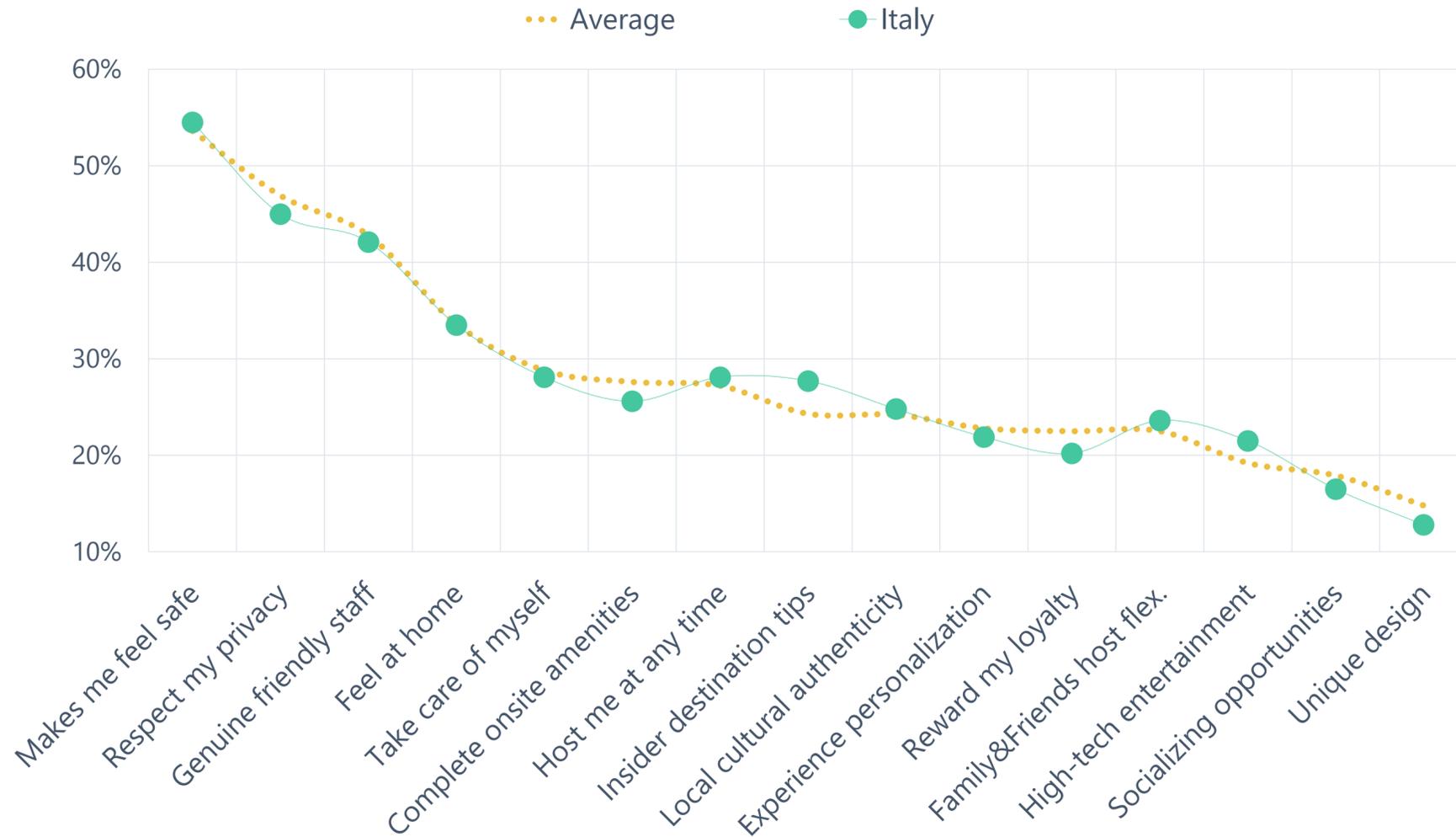
Dutch expectation ranking shows **some extra sensitiveness towards genuineness of staff hospitality**, while the reflection of local culture authenticity seems more secondary in the hotel experience.



# Addressing Market specific Needs

## Italian Travelers

What Italians expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

More of insider tips for exploring the destination

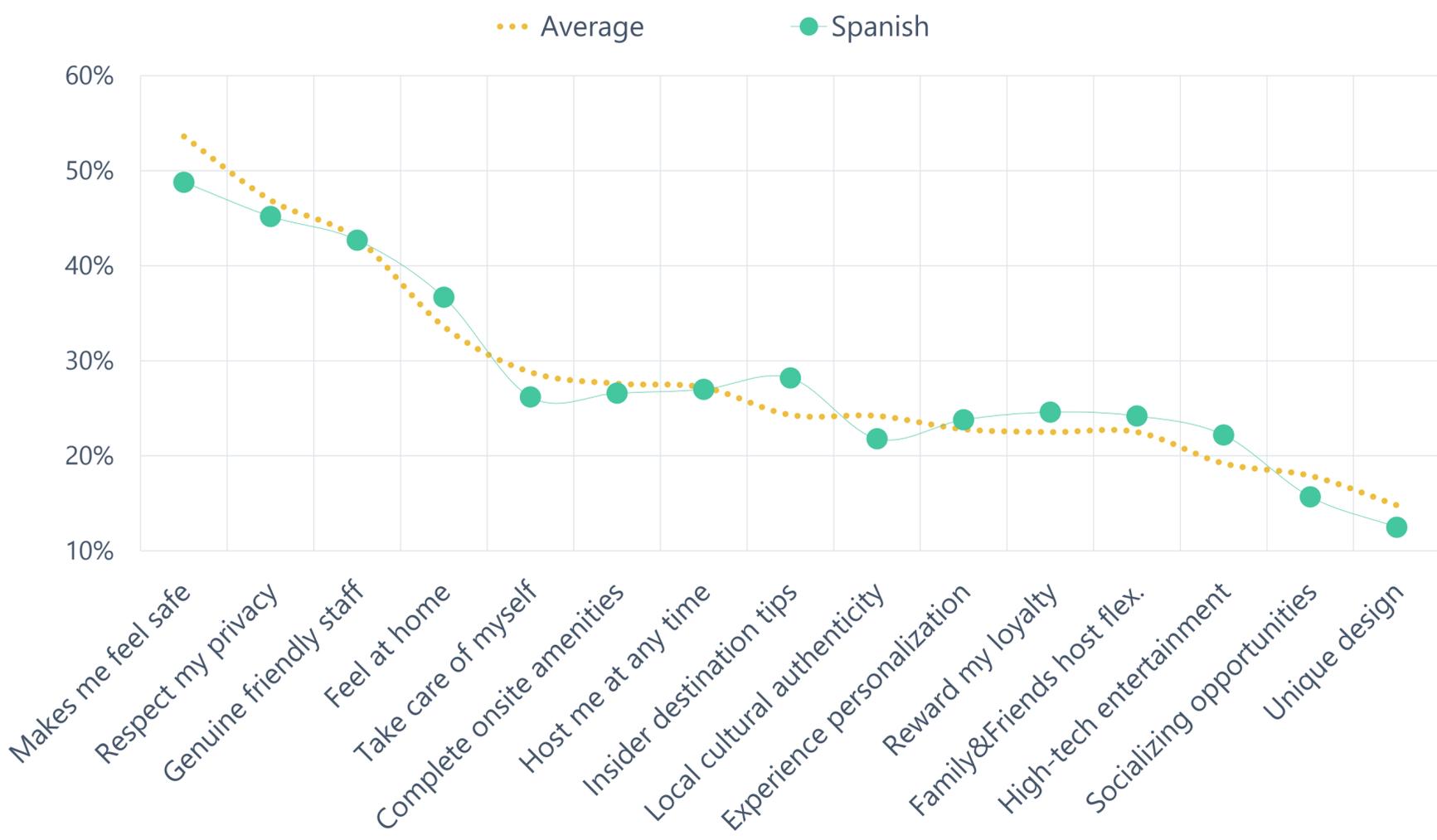
In overall, Italians' expectations fully **reflect the average markets' ranking with safety concerns on top**. The need for insiders' destination tip is well expressed though.



# Addressing Market specific Needs

## Spanish Travelers

What Spanish expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

More of insider tips for exploring the destination

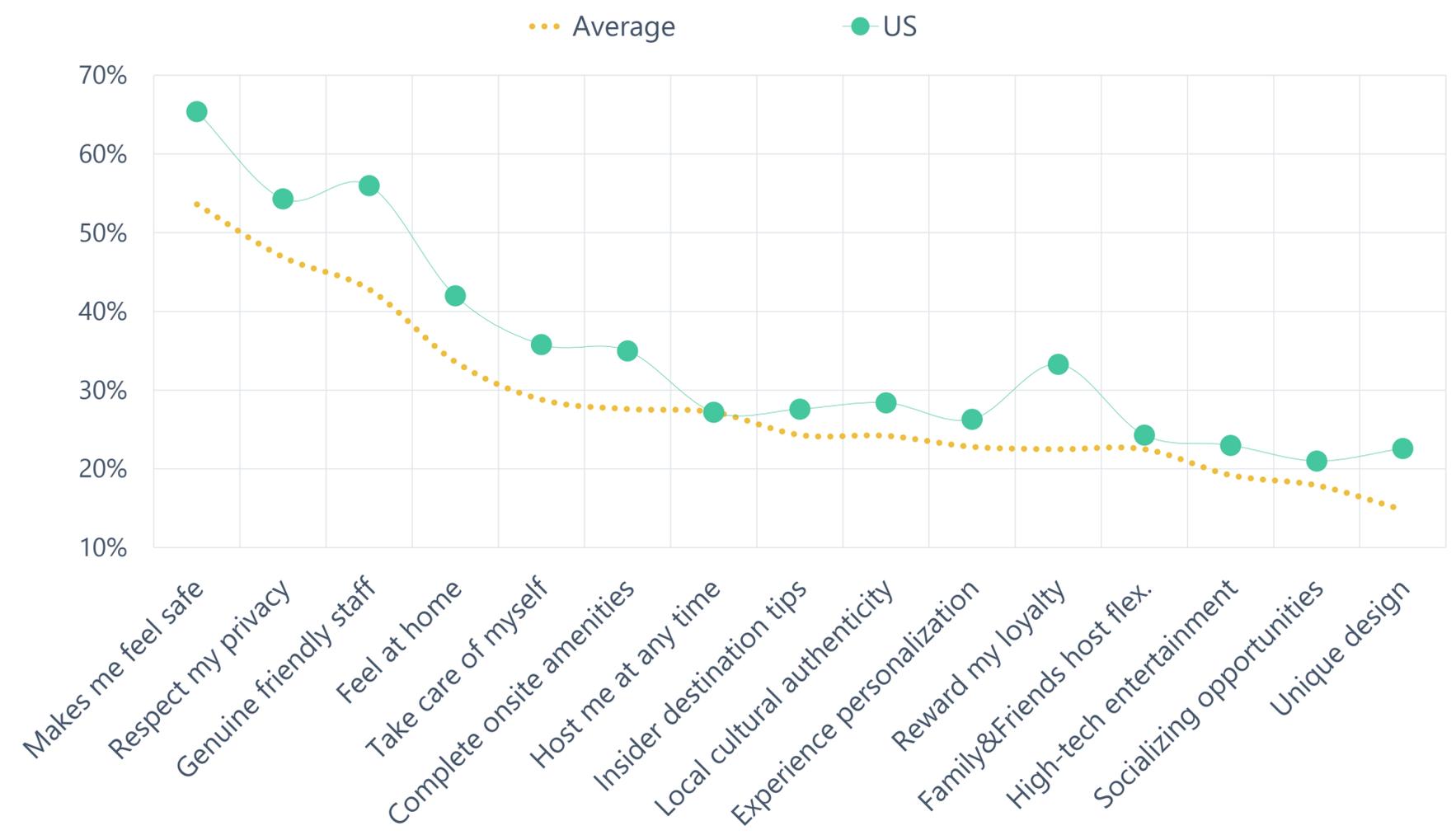
As Italians, Spanish expectations fully **reflect the average markets' ranking with safety and privacy concerns on top**. The need for insiders' destination tip is well expressed too.



# Addressing Market specific Needs

## U.S. Travelers

What Americans expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

### Better welcoming, better rewarding

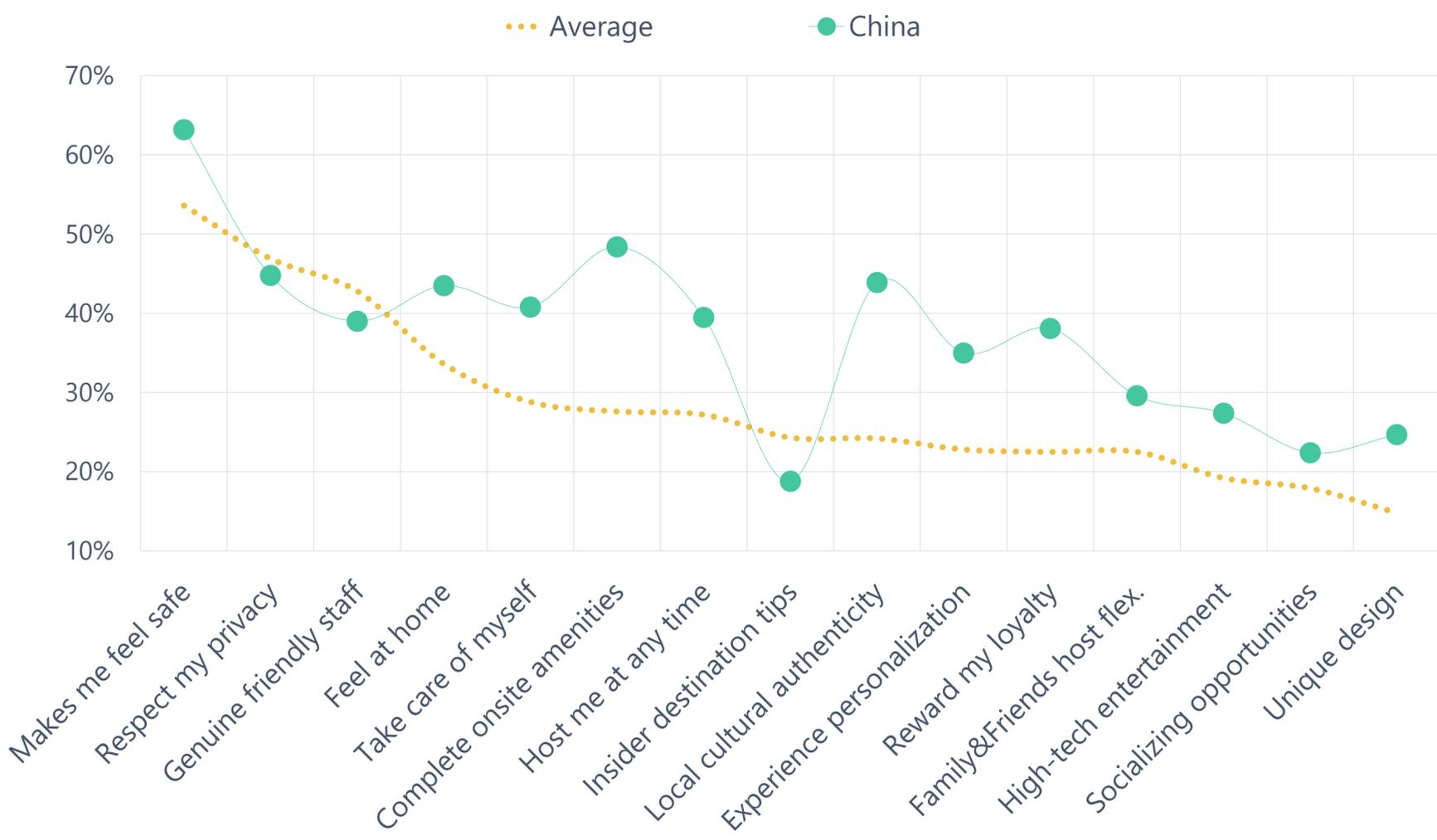
U.S. guests expect clear signs of distinctive consideration from future hotels, including an **outstanding genuine staff hospitality** and **better rewarding programs**.



# Addressing Market specific Needs

## Chinese Travelers

What Chinese expect from hotels tomorrow...



% of score 5 on an importance rating scale from 1 to 5

A safe and authentic complete experience in one place

Chinese express the **highest level of expectations with safety** and would enjoy in the future **“all-in-one place” experiences** that can reflect the local cultural authenticity.

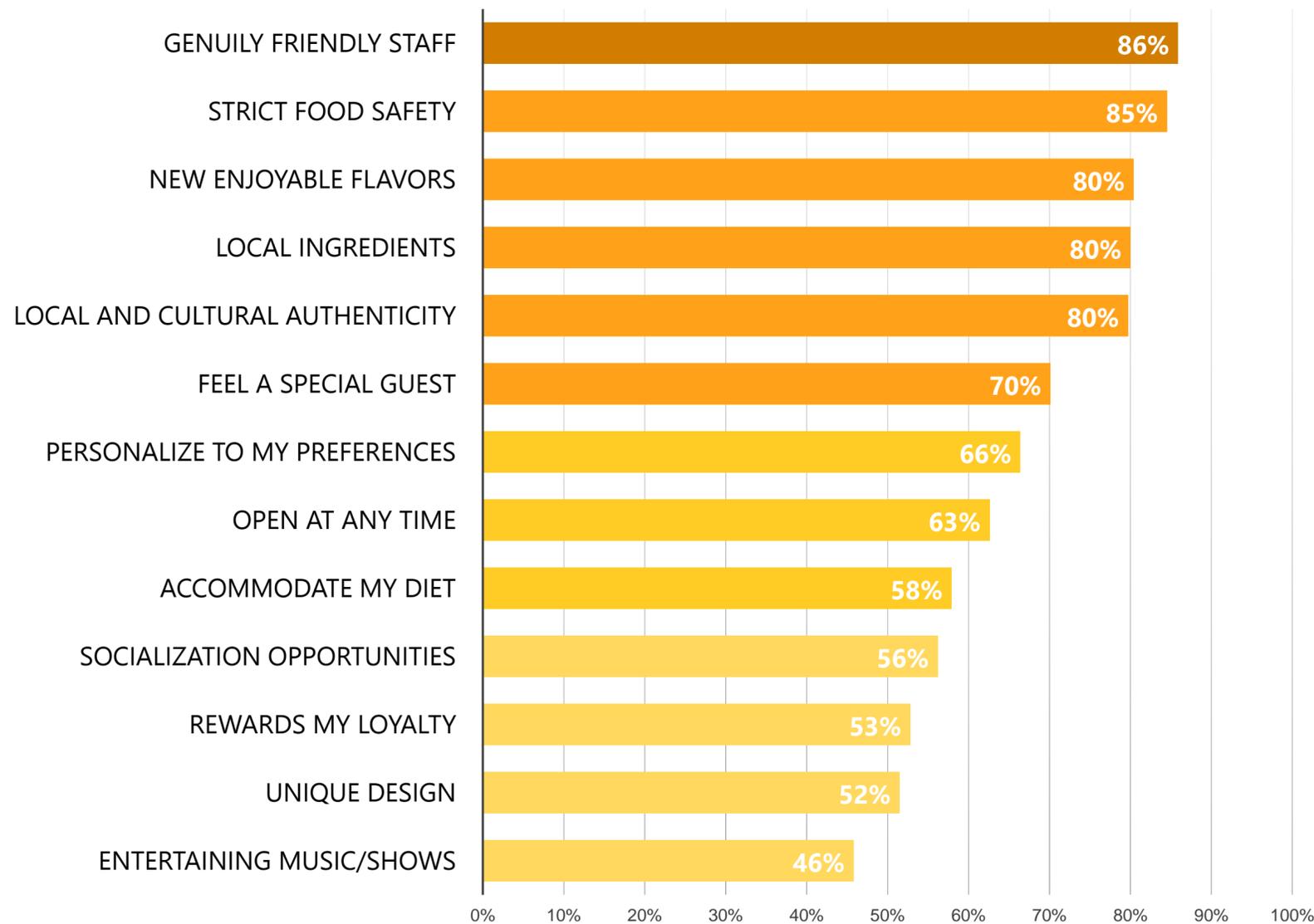
# What ideal experiences are expected from restaurants in the future?



# Defining the Ideal Restaurants Experience for Tomorrow

TOP Consumer Benefits expected from Restaurants in the future

*What ideal experience would you expect from a restaurant in the future?*



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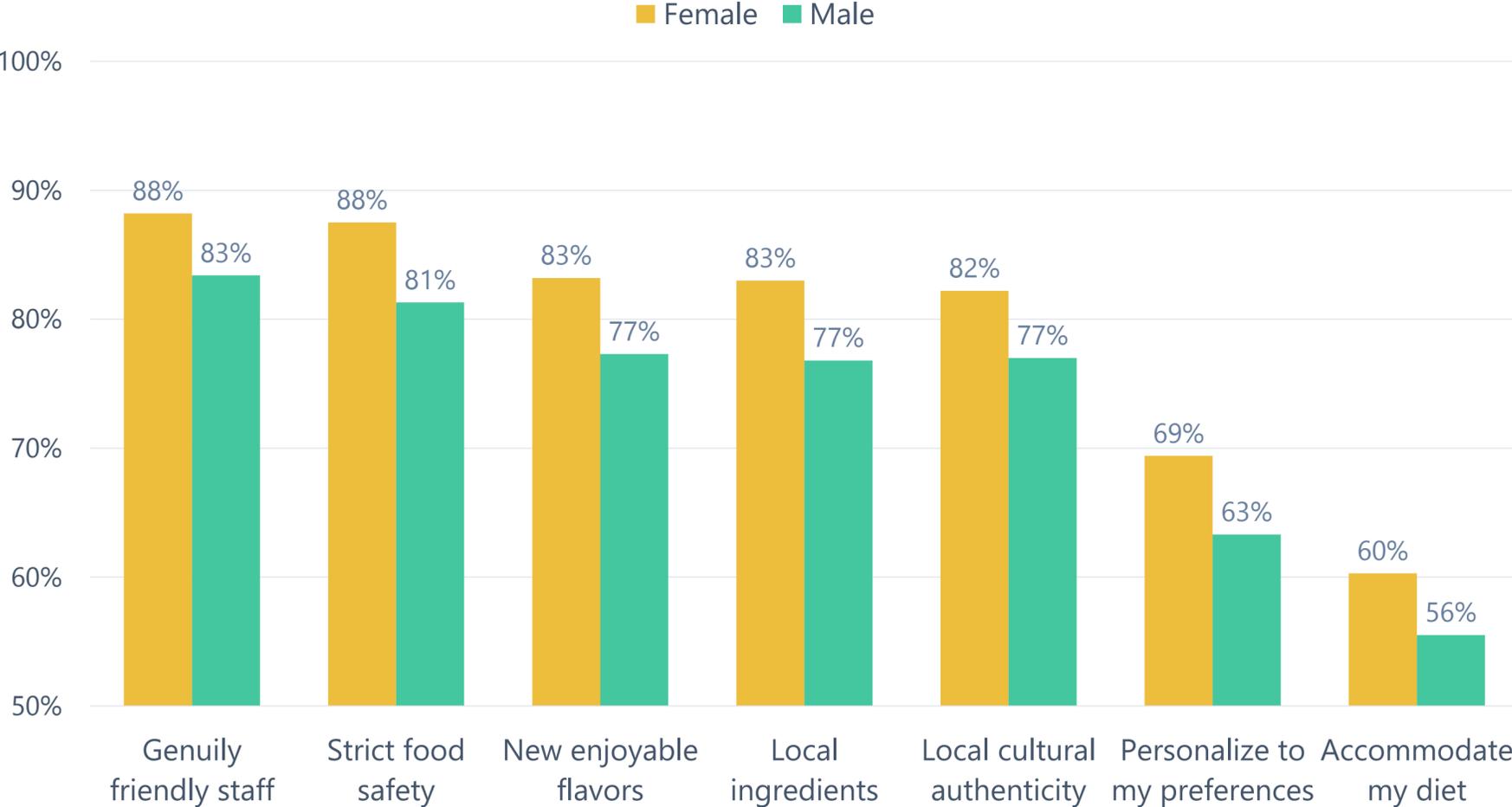
The place for enjoying local authenticity ... with food safety complete re-insurance

Travelers express clear **needs for more transparency and authenticity in their future food experiences**. Restaurants are definitely the place for tasting and **discovering the local authenticity** from both **genuine local people** and **local flavors**.

# Addressing Gender-specific Needs

A focus on female guests' expectations

What female guests expect in particular from restaurants tomorrow...



% of scores 4+5 on an importance rating scale from 1 to 5

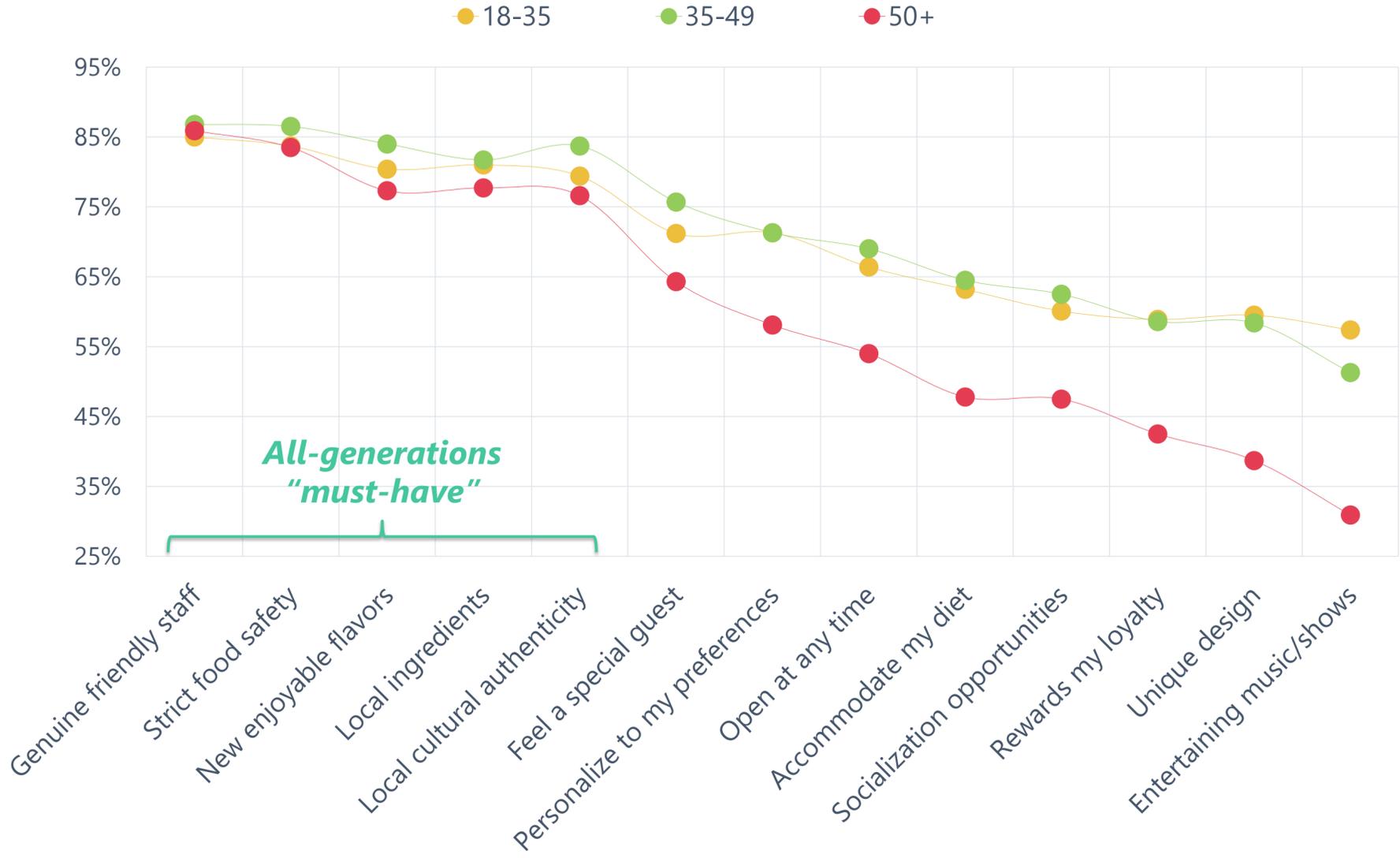
Female guests look for an epicurean, sustainable and flexible experience

More than males, female guests would expect a **total restaurant experience** that combines **local immersion** and ability to **adapt personal tastes** or special diets.

# Addressing Generational-specific Needs

Generational shift requires adaptation

What generations expect from restaurants tomorrow...



Millennials expect much more from restaurants than Boomers

While a genuine, local immersive food experience is expected by all age guests, **younger generations are expecting much more from restaurants** compared to their elders: unique design and atmosphere for some, a bit of entertainment while dining for others. Flexible opening time and more personalization and consideration are appreciated as well.

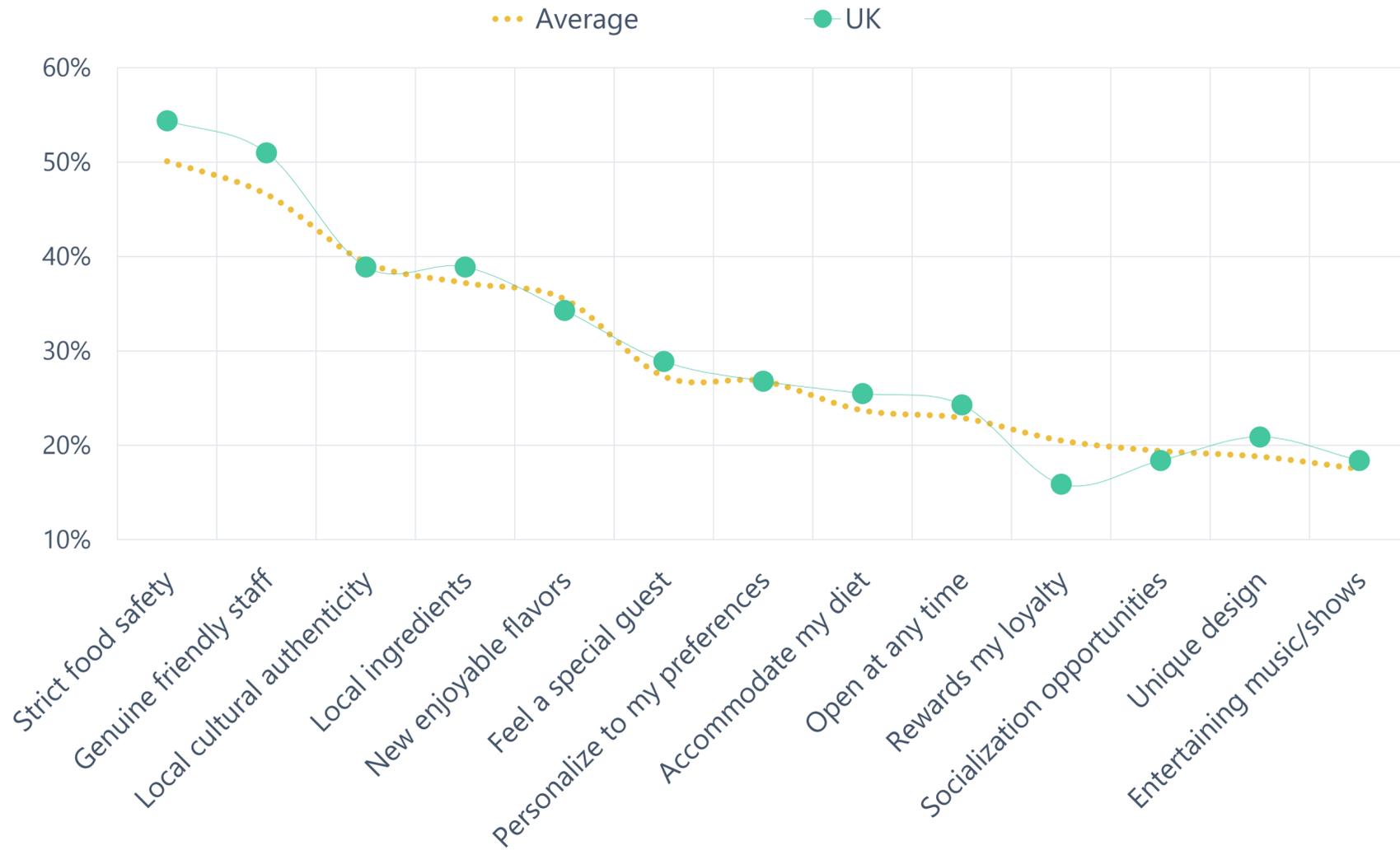
% of scores 4+5 on an importance rating scale from 1 to 5



# Addressing Market specific Needs

UK Travelers

What British expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## Food safety and genuine hospitality

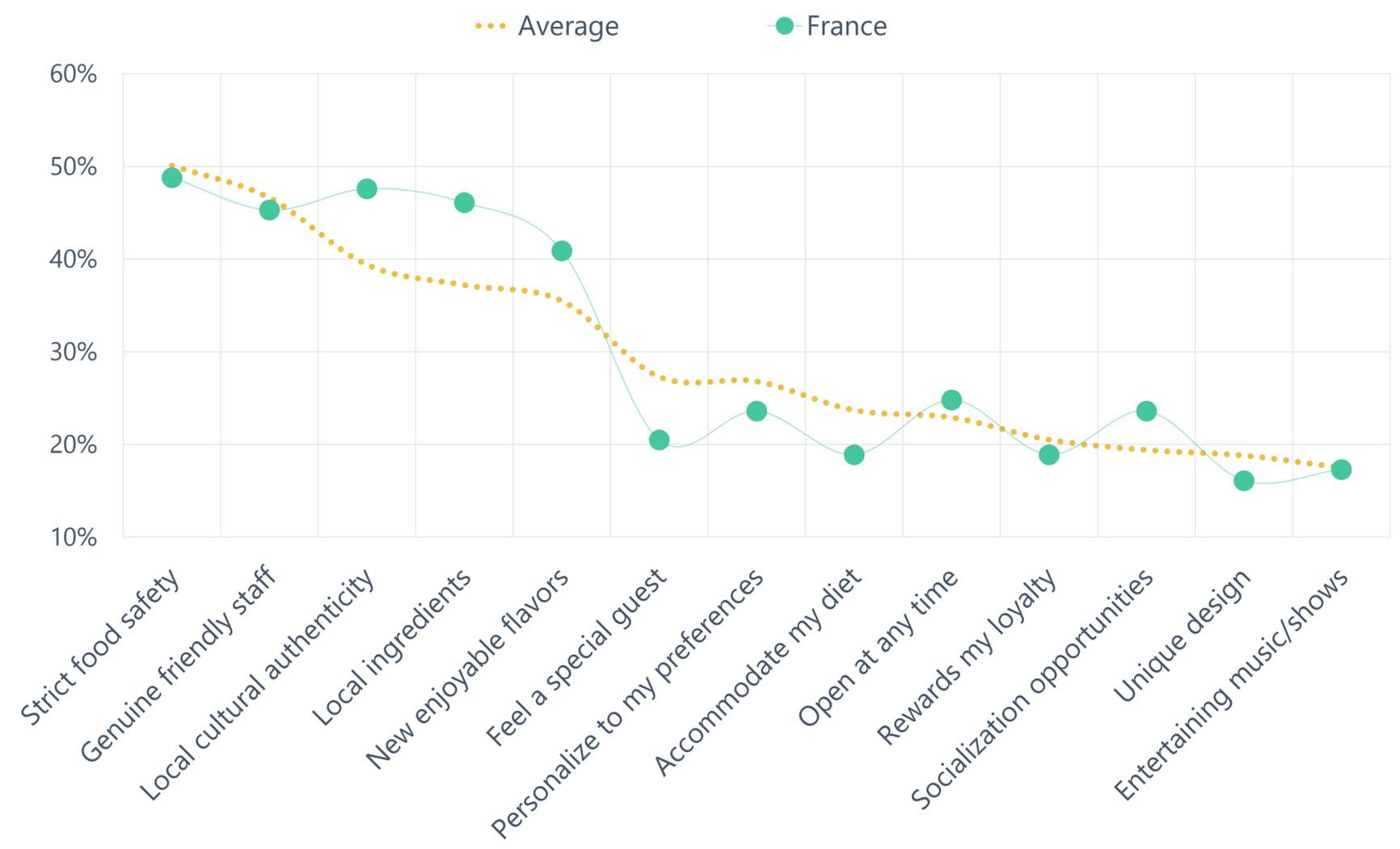
British guests insist on **food safety** and **genuine hospitable service**. Loyalty reward seems less in their top expectations for the future.



# Addressing Market specific Needs

## French Travelers

What French expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## Eating local and socializing

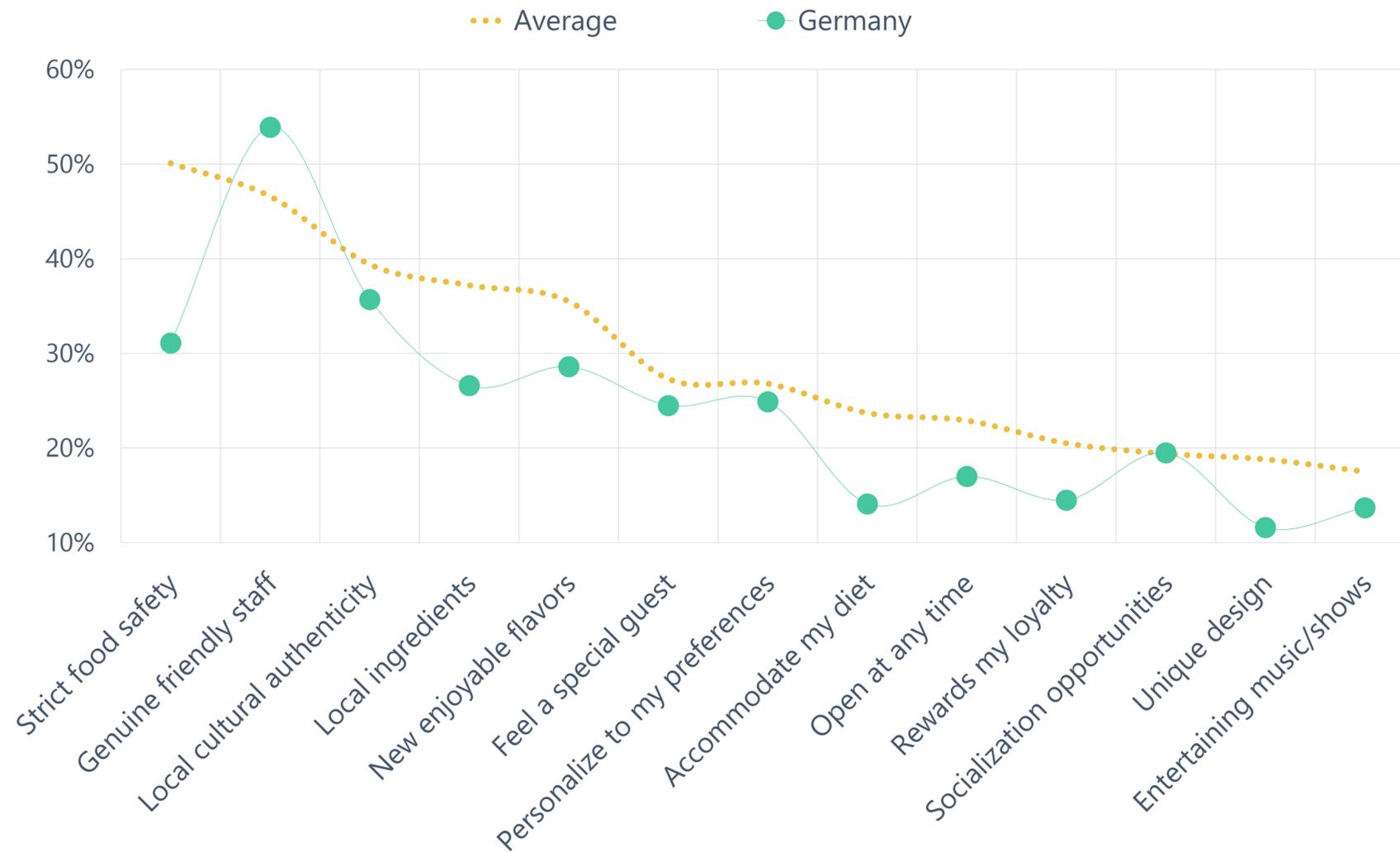
The French search more than any other market for an **authentic and new local experience** when dining out. Restaurants are also seen as a place or socializing.



# Addressing Market specific Needs

## German Travelers

What Germans expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## A special focus on staff hospitality

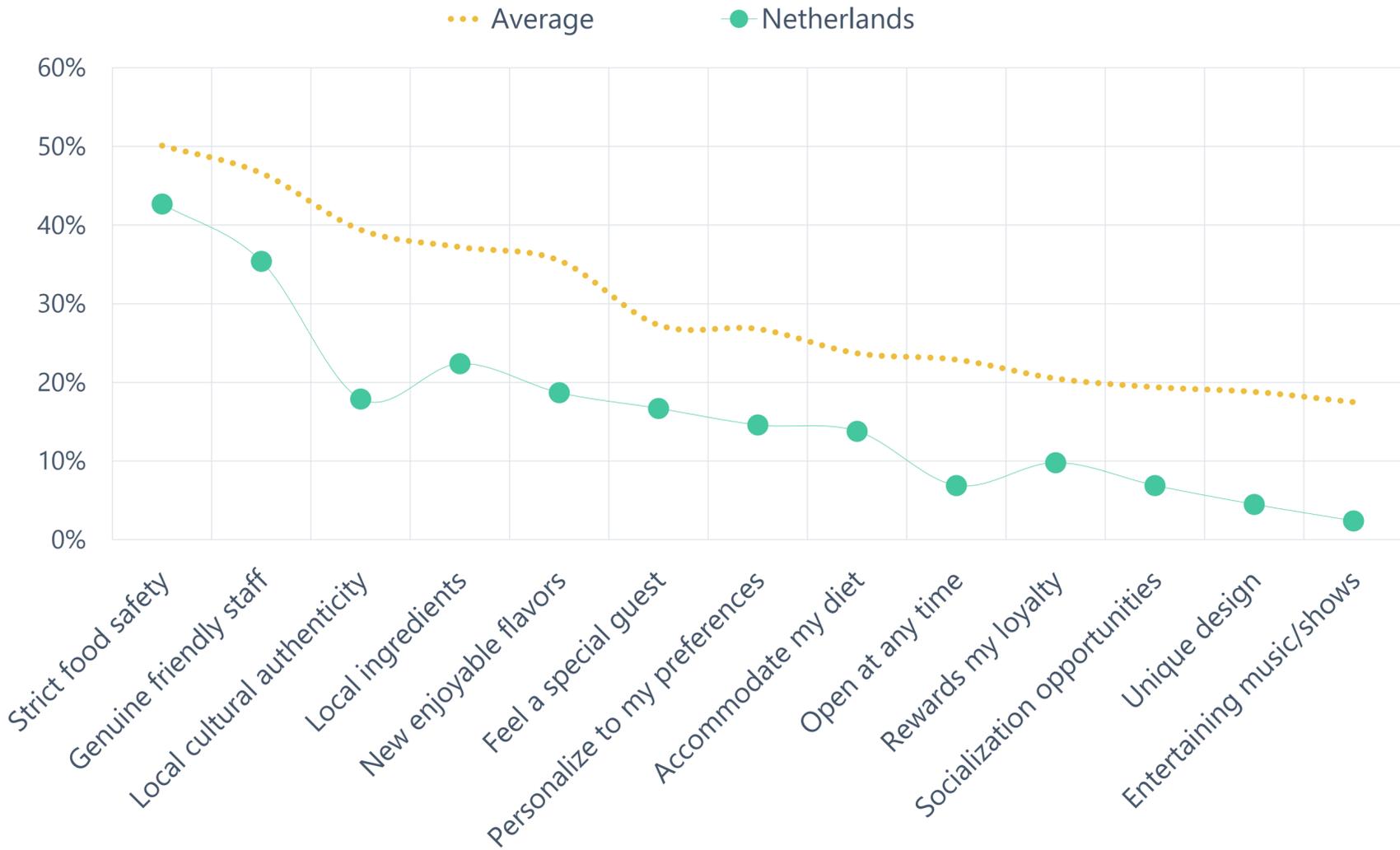
Germans express a **strong expectation towards the genuineness and friendliness of staff hospitality** in future restaurants, while food safety seems less a concern (seen probably as an obvious prerequisite).



# Addressing Market specific Needs

## Dutch Travelers

What Dutch expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

A lower sensitiveness to the "local touch"

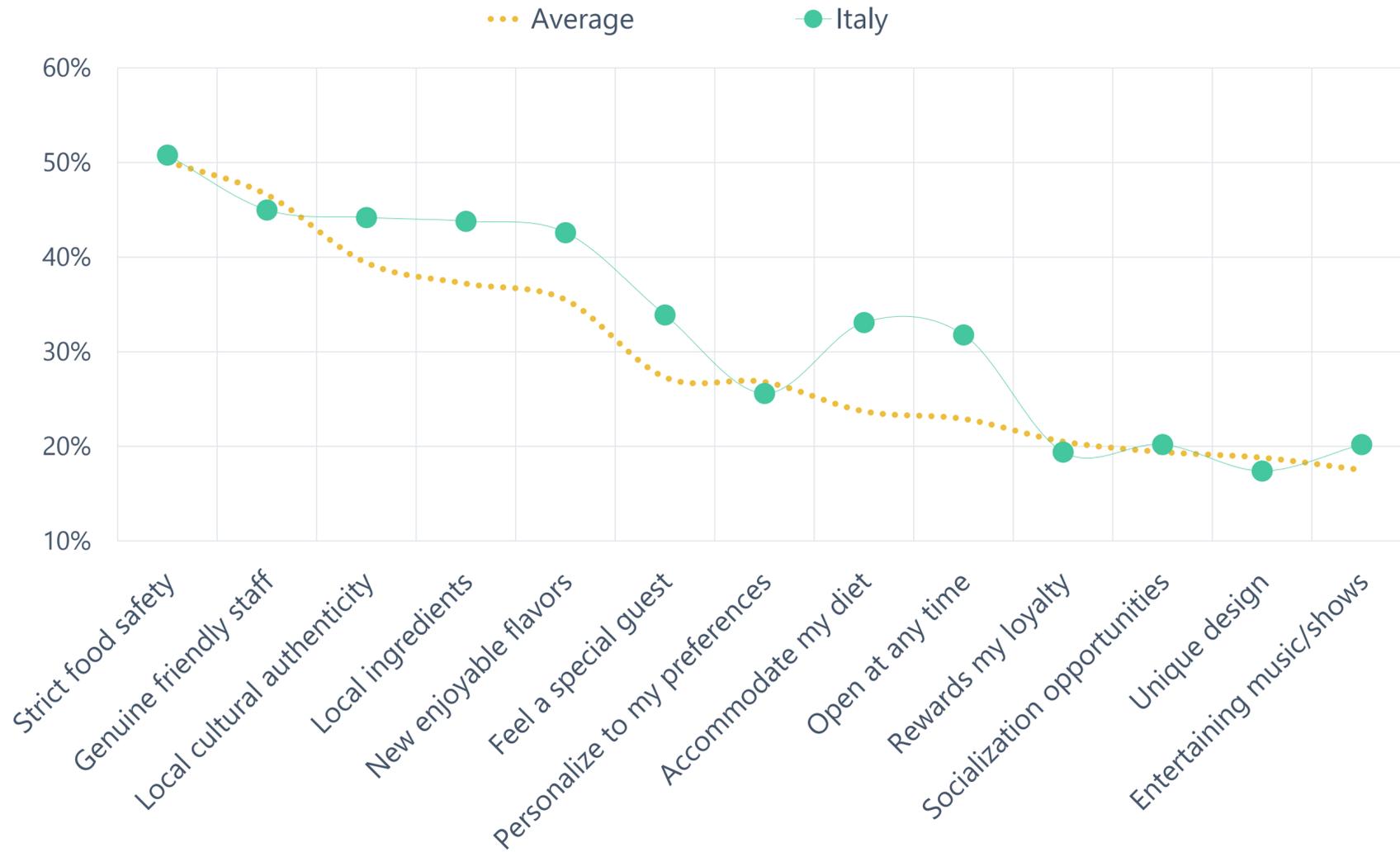
All in all, basics are expected by Dutch guests who will pay a bit less importance to the local authenticity than other markets when dinning out. They credit however a lot of interest to the **food safety requirements and staff hospitality.**



# Addressing Market specific Needs

## Italian Travelers

What Italians expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## Local and flexible experiences

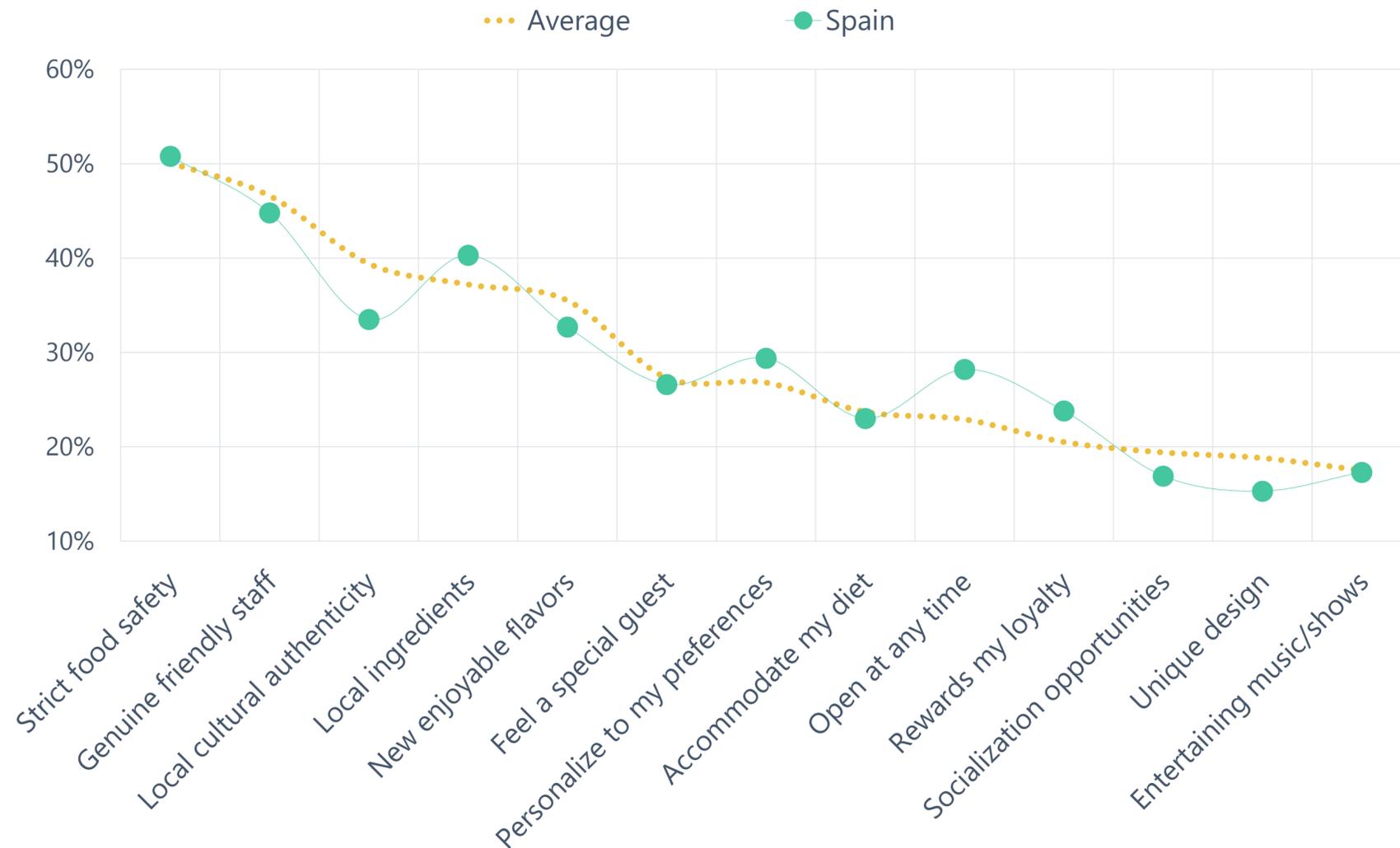
Like the French, Italians will look for **more authentic and new local food experiences when traveling**, with flexibilities in **opening time** and adaptation to personal diets.



# Addressing Market specific Needs

## Spanish Travelers

What Spanish expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## Dinning out at any time!

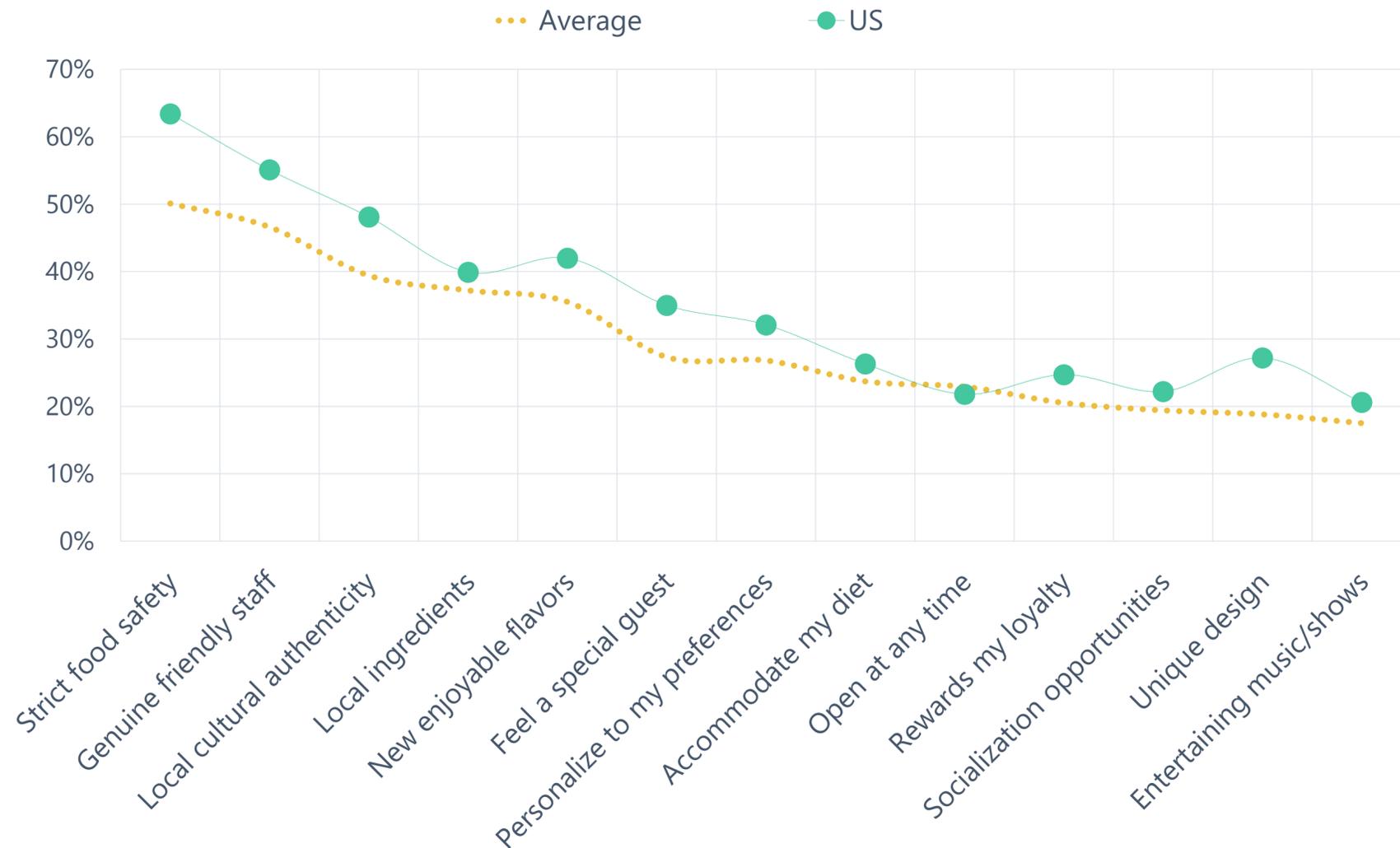
The Spanish expect restaurants to **accommodate their opening hours to their famous “Spanish time”**, along with key top expectations with food safety and staff hospitality.



# Addressing Market specific Needs

US Travelers

What Americans expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

## Service and design

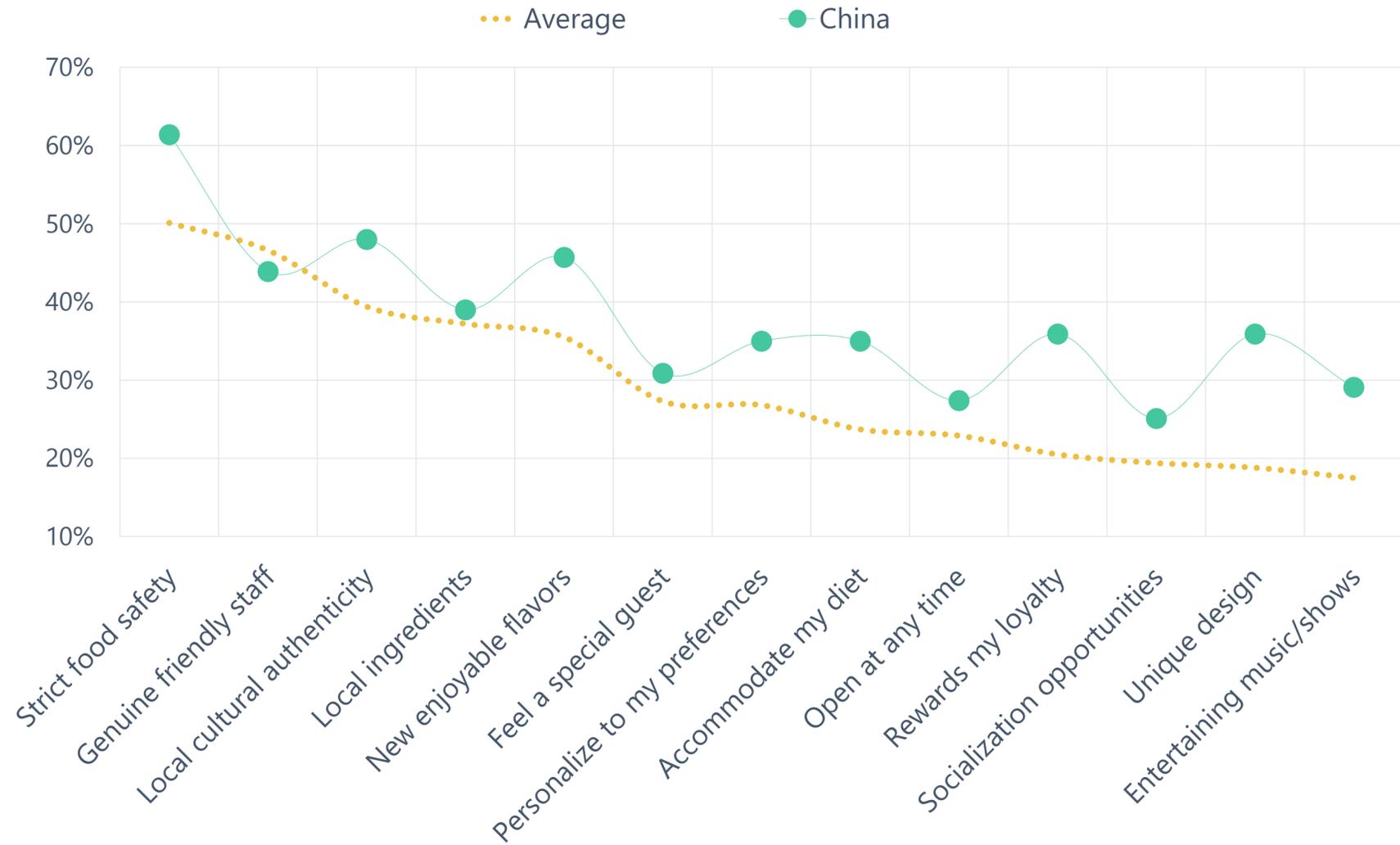
U.S. travelers will expect **the highest level of standard** for **food safety** and **hospitality** from restaurants' staff, including consideration to specific dietary concerns (e.g. vegan, gluten free). **Design** is also seen as an important facet of the food experience.



# Addressing Market specific Needs

## China Travelers

What Chinese expect from restaurants tomorrow...



% of score 5 on an importance rating scale from 1 to 5

### Discovering new food experiences while being considered

Chinese have **special expectations**. While sharing the same **concern for food safety**, they show clear **appetite for exploring new local flavors...** yet demanding more **personalized attention** to their preferences. **Design** also raises high interest.

# Conclusions

Take-Aways



# Take-Aways for European Hotels

## Key learning from the survey

1

The accommodation plays, as never before, a **central role in the visitor experience**, acting as an “epicenter” that spreads over the destination overall quality perception. Thus, the ability to manage clients’ aspirations “around” the hotel experience can bring further consumer value.

2

European hotels’ **value for money** perceptions are **challenged by the global competition**, particularly those impacting satisfaction among **intra-European** and **budget travelers**. On a positive note, **efforts to better welcome Chinese visitors seem to be paying off!**

3

The « **Scaring economy** » impacts as much as the « **Sharing economy** »! While socializing in hotels is expected by some, a safety **is a priority to all visitors**. In this respect, the hotel industry has full legitimacy in taking measures to ensure the safety of its visitors.

4

**Distinctive differentiation strategies exist** focusing on unique design, entertainment offerings, all-in-on-place amenities, socializing spaces). **However, they all require that basic expectations are met first**, including ensuring safety, genuine hospitality, privacy, respect and flexibility.

5

**Adapting the style of hospitality** according to guest’s profiles will remain paramount in the future, with particular focus on the **generational shift** (Millennials expect more than Boomers!), gender and **cultural market-specific needs**.



# Four Key Hotel Guests' Expectations to Address in the Future

Summarizing Consumers' Needs

## Amaze me!

*A unique place that quenches my search for discovery, with new design, entertaining digital and rewarding personalized experiences.*

## Give me all in one place

*An all-in-one place I am happy to spend time in, where I can get rewarded and given token of appreciation. Local immersion is less my priority: let's have fun and digital experiences inside first!*



## Take good care of me

*A safe retreat that offers privacy, comforts me and takes good care of me with genuine hospitality that makes me feel at home... away from home.*

## My space for socializing

*A place that offers amenities and atmosphere that allow me to better socialize with my family, my friends, and possibly with local people.*

This specific principle component statistical analysis reflects a segmentation of future hotel guests' expectations, summarizing approx. 70% of the 15 tested criteria variance into 4 axis.

It helps mapping core transverse pillars of consumers' needs that the industry should address in the future so to gain competitiveness.

# Take-Aways for European Restaurants

## Key learning from the survey

- 1** The local food experience has a **growing impact in international visitors' overall satisfaction**, making the restaurant industry a key pillar of destination reputation.
- 2** Like for hotels, European restaurants' **value for money** perceptions are **challenged by the global competition** which tends to offer more **diverse** and **hospitable food experiences**. However, **Foodies** –though representing a minority part of visitors- **are more delighted**.
- 3** Restaurants are expected to be a **perfect place and moment for living the "local experience"** while travelling, offering genuine stories, locally produced ingredients and new flavors. As such, restaurants can be great **ambassadors of destinations' sustainability**.
- 4** The "scaring economy" also impact the local food visitor experience: guests from all nationalities expect restaurants **to provide the highest food safety level**, calling for more transparency and communication about product origins, open kitchens, chefs story etc...
- 5** **Cultural specificities** will continue to massively impact guests' expectations, with growing needs of adaptations to personal tastes or diets, while keeping intact the immersive and discovery facets of the experience.



# Annex – Questionnaire



# Ad hoc questions used in the survey

## Mapping Future Guest Expectations

While travelling abroad, visitors have a wide range of accommodation options. **Regarding hotels in particular, what ideal experience would you expect from a hotel in the future?**

Please use a scale from 1 to 5 to rate the importance of the following aspects:

*The ideal future hotel ...*

*1=not important - 5=very important*

- Displays unique architecture and design characteristics
- Reflects local and cultural authenticity
- Offers opportunities to socialize with other guests and locals
- Provides “insider tips” for exploring the destination.
- Has complete onsite amenities (sleeping, dining, gym, activities, wellness, entertainment...)
- Rewards my loyalty
- Can host me at any time
- Makes me feel at home
- Personalizes my experiences
- Allows flexibility to host family and friends
- Is a place where I can take care of myself
- Employs staff who are genuinely friendly and hospitable
- Respects my privacy and peace
- Makes me feel safe
- Provide entertainment options with high-tech and digital innovations

While travelling abroad, visitors have a wide range of dining options. **Regarding restaurants in particular, what ideal experience would you expect from a restaurant in the future?**

Please use a scale from 1 to 5 to rate the importance of the following aspects:

*The ideal future restaurant ...*

*1=not important - 5=very important*

- Reflects local and cultural authenticity
- Displays unique architecture and design characteristics
- Rewards my loyalty
- Is open at any time
- Offers opportunities to socialize with other guests and locals
- Uses locally produced ingredients in its cuisine
- Personalizes the dining experience to my tasting preferences
- Makes me feel like a special and distinctive guest
- Employs staff who are genuinely friendly and hospitable
- Adheres to strict food safety requirements
- Provides entertainment with music and shows
- Accommodates my personal diet choices
- Offers opportunity to discover new enjoyable flavors

# About TCI Research

Competitive insights for smart destinations

## MISSION

We provide local and international destinations in the world with competitive insights covering the whole visitor experience, by using standard and custom advanced research solutions based on conventional surveys and controlled Big Data integration

## VISION

Research is instrumental to efficient destination marketing and management. We help you navigate the complex and competitive visitor economy, measure your performance, detect trends and opportunities for making your destination brand stand out from the competition

## ENDORSEMENTS

In 2011, our TRAVELSAT© Index global survey was given the UNWTO Innovation Award. Since then, 100+ destinations and travel organizations have trusted us, fostering our team to constantly innovate in quality research solutions for destination leaders



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