

Meeting the needs of the
European hospitality sector
with cutting-edge video tech

Contents

Page **04** | Introduction

Page **08** | Guests focus on safety and security

Page **10** | Solving multiple challenges

Page **14** | Understanding value

Page **16** | Finding the right balance

Page **20** | Accurate and affordable analytics

Page **24** | Getting the most from video





1. Introduction



The hospitality sector is adaptable and resilient, but is facing multiple pressures, including continuing fall-out from the pandemic, staff shortages, supply chain disruption, rising energy costs and economy-wide inflation. In particular, tourism is vulnerable to air travel disruption and to the cost-of-living crisis, both of which will put downward pressure on bookings through 2022/23.

This comes on top of a period of unprecedented financial stress: one estimate from the height of the pandemic put European tourism industry losses at [1 billion EUR per month](#) when Chinese travellers stayed at home.

But it's worth noting that as soon as lockdown restrictions were lifted, Europe once again became the most visited continent in the world, with tourists keen to sample its vibrant cities, famous historic landmarks, beaches, countryside, and mountains.

The latest [study](#) from Mordor Intelligence has projected that the luxury hotel market in Europe is expected to grow at a CAGR of 6% until 2027, bringing much needed investment to towns and cities. And with more tourism expected over the coming years, it is predicted that more than 100,000 new hotel rooms will be opened across Europe in 2022 alone.

The pandemic has driven changes in customer behaviour and that gives hoteliers and hospitality venues new opportunities. Health & safety, and personal security, have become more important, and venues need to reimagine the visitor experience and re-engage with customers. Business travellers are also increasingly likely to take a partner or spouse on their trips, combining business with leisure. This emerging trend – ‘bleisure’ – gives hotels the opportunity to adapt, providing enhanced services targeted at these customers.

Looking ahead, as hotels respond to changing consumer preferences, and adapt to continuing market volatility, those that take advantage of new tools that improve operational agility – including smarter, increasingly integrated video solutions - will be more resilient and more competitive.



Guests focus on safety and security

Safety and security are a top priority for guests, and often a key selection factor for VIP customers and corporate travellers when choosing where to stay. Whether it's a luxury boutique or a short stay travel hotel, the minimum expectation for every location is that guests will be safe and feel safe, and that their personal property will be protected.



Although Europe is generally seen as a safe destination, serious crimes such as robbery and human trafficking are on the increase, while EU regulations prioritise fire as a top threat to hotel guests. Alongside this, hotel cleanliness continues to be high on the agenda for guests concerned about the spread of diseases.

Failures can quickly lead to direct losses, including rectification costs, reputational damage, and loss of future business. Online reviews are now a major influencing factor for customers, with cleanliness, health and safety, and check-in/check-out waiting times among key quality and service indicators. Negative reviews will soon be posted and put-off other potential customers - for example if rooms are not ready, if families are left waiting at reception, or if there are long queues and over-crowding in breakfast areas.

Of the security and safety technologies widely used in the sector (access control; intruder systems; fire systems; physical measures, etc.) video tech is one of the most powerful and flexible tools to counter these challenges and risks.

Today, technology convergence and integration with other security, building management, and back-of-house systems allow for more effective centralised monitoring and control, equally for independent single-location hospitality businesses, and for branded chains with multiple locations.

Yet well-designed video systems are still among the most effective management tools available. They allow staff to be better allocated and to work more efficiently and offer benefits that go beyond security to give a rapid return on investment (ROI). For many hotel operators and their on-site management teams video solutions are the foundation for optimised service efficiency, giving extended visibility and control over all aspects of their operations, front and back of the house.



Today, quality surveillance solutions are affordable to install, maintain, and offer a low total cost of ownership (TCO). They can be adapted to every location thanks to a wide choice of video management software and a range of cameras that will suit each site's aesthetic requirements and guest expectations, maintaining the desired balance between a hospitable welcome and assurance of security. And dynamic privacy masking and export tools allow video to be retrieved for evidential purposes, while protecting and respecting the identities of guests, to ensure compliance with GDPR and other international privacy laws.



Looking at these issues in more detail, this eBook is written to give systems integrators a better understanding of the hospitality sector and the key challenges faced in it, and an insight into how the needs of the sector can best be met. It is also designed to help hotel owners, managers, and security consultants understand the latest developments in video technology, its uses, and value.

2. Solving multiple challenges



The hotel segment of hospitality is a diverse sector offering a range of guest experiences and services, and as a result, facing equally diverse risks.

The sector includes full-service and limited service hotels that include multiple branded and franchised hotel chains, with the franchises (i.e., branded hotels which are run by the independent owners or, on their behalf, by third-party operators) making up the majority of this segment of the market.

Other significant segments include independent and family-run hotels, boutique hotels, spas, and wellness retreats.

The key decision-makers in the sector include the brand owners and chief engineers; risk managers; branch-level security, facilities, and general managers; and independent hoteliers – it is they who weigh up risks and try to make the best choice between the many technologies on offer.

And the role of security managers in the sector is much broader than it used to be. For today's security planners, the focus is not just on preventing theft, fraud and property losses, but on supporting wider business objectives: planning for threats that range from cybersecurity breaches to major disruption from terrorism, civil unrest, supply chain pressures, acute staff acquisition and retention issues, extreme weather events, and preparedness for future pandemics.



Theft continues to be a serious problem for hoteliers, including not just guests' property being stolen but hotel property as well. There is a growing trend, especially in 4-star and 5-star establishments, for items such as televisions, ceramics, iPads and even pieces of art to be stolen by guests who feel entitled to it after paying such large sums for a room. A survey by [Wellness Heaven](#) stated that "luxury hotel larceny is rising precipitously" with mattress theft having increased by 35% in the last three years and television theft rising by 11%.

Drug misuse and prostitution are also challenges faced by hotel staff working predominantly in the five-star segment particularly in large and capital cities. The latter may not be a criminal offence in many countries, but security teams need to profile guests, monitor behaviour, and deal with situations to prevent disrupting other customers. As a result, even for major chains that have dedicated senior security directors, that function is increasingly integrated with the overall business strategy and customer experience.



3. Maximising technology



The need to remain competitive

A key vulnerability for hospitality businesses is the reluctance to deploy what are becoming transformative technologies, and failure to remain competitive.

In hospitality settings, video – especially systems with AI-enabled analytics designed in and continually updated are starting to give a competitive edge. This is a rapidly changing market that is increasingly global and subject to pressure from online competition and customer reviews. Those who don't keep up risk being disadvantaged.

For businesses to stay up-to-date, and to realise the growing benefits from the latest generation video technology, it's important to understand their full value. For competitive hotels, video is no longer just used to reduce costs and cut risks, but to improve service delivery and efficiency in a way that is adding competitive value to the customer offering.

Long-term strategy

Hotels also put themselves at a disadvantage if they don't think strategically about the long-term value of video investments and upgrades. When it comes to investing, while the temptation may be to rely on mix-and-match video systems from multiple suppliers or to bolt a new kit onto older legacy equipment, this can cause compatibility issues, limit the use of new camera features, increase maintenance costs long term, and prevent hotel chains from benefiting from centralised management.



It is still possible to retain legacy cameras and re-use existing infrastructure – while reducing costs – but this is best done by using the foundation of a video management software (VMS) from a manufacturer with a

proven ability to integrate third-party tech without the traditionally associated price tag of high annual licensing agreements, and costly device connection costs. With this approach it's possible to upgrade to the latest capabilities without waste; the likelihood of compatibility issues is reduced, and a clear line of technology accountability and support – via both the vendor and systems integrator – is maintained.

The more suppliers there are in a chain, the harder it is to resolve issues, and corner-cutting often leads to higher costs.

Cybersecurity to the fore



Compliance and cybersecurity are the other key risks associated with technology including video and associated IoT devices. According to a recent article in the [Financial Times](#), hotels and hospitality is the third most cyber attacked sector. Post-pandemic, hotels are an even richer mine of personal data for hackers. So, it is essential to look for manufacturers that have inherent cybersecurity, follow best practice, train staff, and comply with current legislation.

The General Data Protection Regulation (GDPR) has forced much higher standards and showed it had teeth following a Marriott data breach: the hotel chain was fined USD \$22 million by the UK data regulator acting on behalf of the EU. Analysts believe the cost is likely to be closer to USD \$46 million once legal, PR, analysis and rectification is accounted for, while damage to brand reputation is hard to quantify.

Given that larger hotels will continue to collect and process lots of personal information and financial details, integrators and security teams need to carefully consider the cyber risks versus the benefits of adding video systems to their networks. Installing cybersecure video solutions from trusted providers will reduce concerns about hackers finding camera vulnerabilities and easy remote backdoors into systems, or the threat of leaked video footage, particularly of VIP guests.



4. Understanding value

With the sector under financial and resourcing pressure, it's vital to avoid technologies with unfair pricing structures and ongoing costs such as license fees. When comparing options, these are points for every buyer to check:

- Understand how to calculate TCO (Total Cost of Ownership)
- Verify ongoing expenditure beyond the upfront hardware costs and initial installation such as license agreements and device connection fees
- Ask about the duration of warranties against equipment failure
- Ask what technical support is provided by the manufacturer long-term, how often cameras and other devices are subject to discontinuation, and if vendors offer forward and backward compatibility
- Understand any disruption to business operations during installation and maintenance, as downtime could result in business continuity issues or have a negative impact on the guest experience
- Ensure the solution is futureproof with the ability to adopt new technologies such as intelligent video analytics, federation services, integration with popular databases, third-party cameras and other systems, or ease of connection to a rapidly expanding range of IoT devices.



5. Finding the right balance



While hotel owners and operators are not subject to regulatory compliance, the sector plays a significant role in wider economies due to its size and the nature of its business and larger hotels and resorts are often seen as nationally important. So, it's crucial that hotel owners and their chosen systems integrators conduct risk assessments at each individual property to determine appropriate protective measures. They should use their knowledge of the property's operations and vulnerabilities, as well as risks posed by the local environment.

This also means contemplating how to balance a positive guest experience with enhanced surveillance measurements, while keeping abreast of regulations in some EU countries that prohibit surveillance in communal areas to protect guest privacy.

For internal locations the best choice of cameras includes full HD IR dome cameras equipped with varifocal lenses, true WDR and IR LED capability, guaranteed to deliver high-quality footage in low-light settings; discrete units; and fisheyes giving wide area coverage.

The best of today's 360-degree panoramic cameras, including ultra-HD 12MP fisheye cameras, deliver evidence quality images right to the periphery of the scene and provide panoramic coverage equivalent to three or four conventional fixed lens cameras.



Restaurants, dining areas and bars: discrete and compact cameras can be used to identify potential fraudulent activity both at-table or at cash desks; to monitor customer safety real-time, and rapidly investigate alleged safety incidents; to remotely check that staff are following food hygiene protocols and thoroughly cleaning and disinfecting tables and surfaces; to allow rapid investigation and resolution of disputes between customers and staff, or between customers; and to verify consistently high service standards. Hoteliers are more than aware that a customer unhappy at their dining experience, and in particular breakfast, is more likely to leave poor reviews online.

Practical solutions that can help such as queue and occupancy monitoring to alert managers to divert staff appropriately, as well as heatmapping historic data to understand peak times and streamline operations to guarantee a consistency of service.

Front desks: low profile cameras have value for security, theft prevention, and receptionist and guest safety, and to assist staff working in lobbies, at self-checkout kiosks, luggage storage, and cloakrooms.



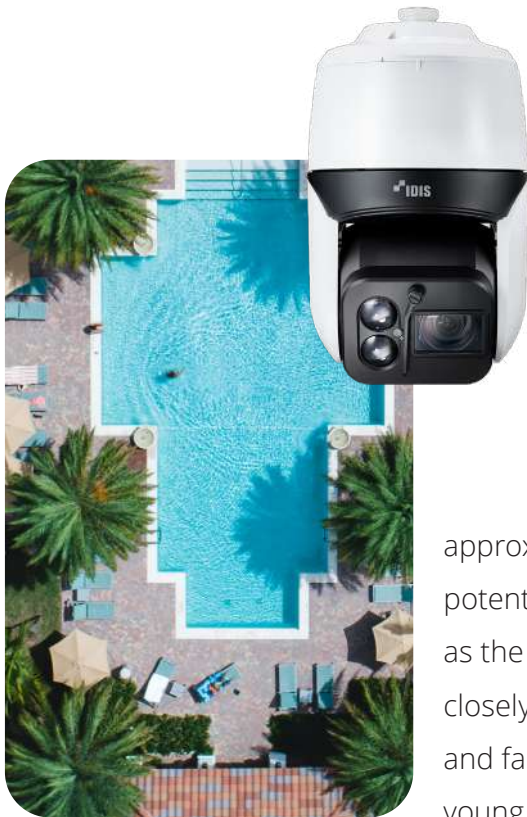
Conference and meeting room facilities: locations where high-value IT and AV equipment is used, commercially sensitive information may be under discussion, senior VIP guests may require tailored protection, and thorough cleaning is required after each event.



Kitchens: video can be used to increase the operational efficiency of back-of-house staff; monitoring hygiene practices; deterring and detecting theft of high-value food and other catering supplies; allowing smooth and rapid investigation of stock discrepancies, hygiene incidents or allegations; and monitoring and verifying workplace health & safety.

Guest entrances and exits: a range of IR and true WDR will be essential to monitor people, including guests, entering, and leaving the hotel and help monitoring staff to detect suspicious behaviour such as bulky clothing signalling a visitor might be concealing a weapon or a guest taking an unusually large amount of luggage to their room.





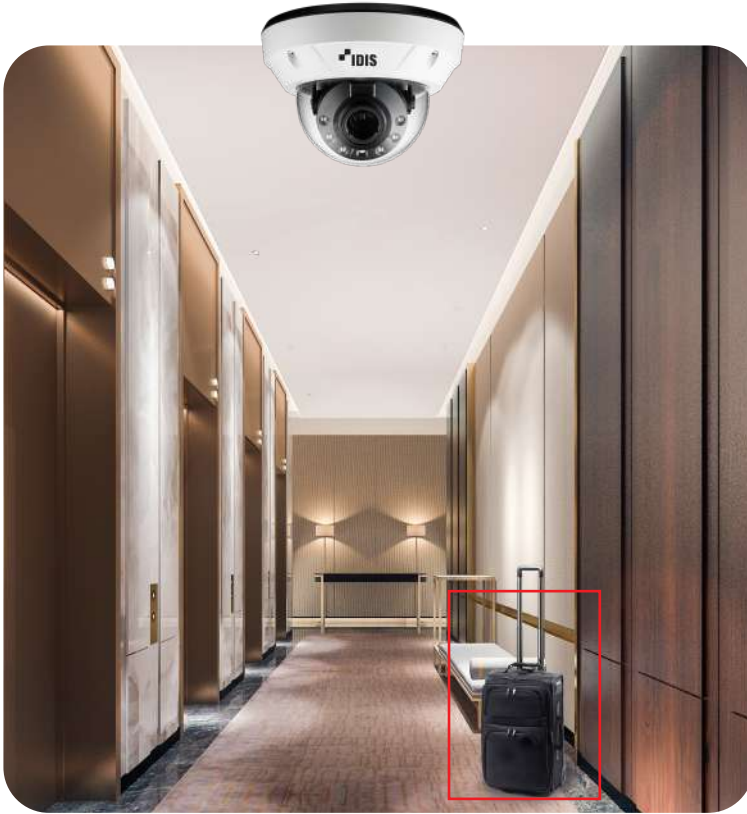
For **exterior locations**, targeted deployment of rugged and vandal resistant bullets and PTZ cameras around building structures, hallways, and hotel grounds should provide a clear line of sight and give staff reliable situational awareness in all light conditions – including 4K cameras that can provide night-time image capture at distances of approximately 200m using built-in IR - providing early warning of potential threats. Hotel pool areas and diving boards are seen as the biggest risk after fire at EU hotels, indicating they must be closely monitored for risks such as accidents, drowning, and slips and falls, especially at hotels that cater for families with young children.

Back of house: video helps in protecting delivery areas and baggage storage: preventing unauthorised access; reducing shrinkage; monitoring and verifying deliveries; protecting rear entrances, parking lots and guest vehicles; and ensuring staff safety, especially out of hours.

Parking: License plate recognition streamlines parking management, with pre-designated approved vehicle lists automating allocated spaces, speeding up entry and exit to improve customer first impressions and consistency of experience.



6. Accurate and affordable analytics



Camera performance has long been enhanced by analytics functions - including active tampering alarms, motion detection, auto-tracking, and trip zones – and analytics are becoming increasingly accurate, useful, and affordable thanks to developments in neural networks and deep-learning algorithms.

AI-powered analytics will now reliably spot activity including loitering in target areas and give early warning of potentially suspicious behaviour – for example loitering in reception areas, car parks, delivery zones, high-value storage areas, near entrances and internally in corridors, near unmanned counters or food preparation and display areas.



Analytics can send warning notifications if emergency exits are

blocked, to comply with fire regulations; they can provide highly accurate line cross detection around perimeters; and alert operators to prohibited parking, or if areas such as reception become overcrowded.

Faster verification and response

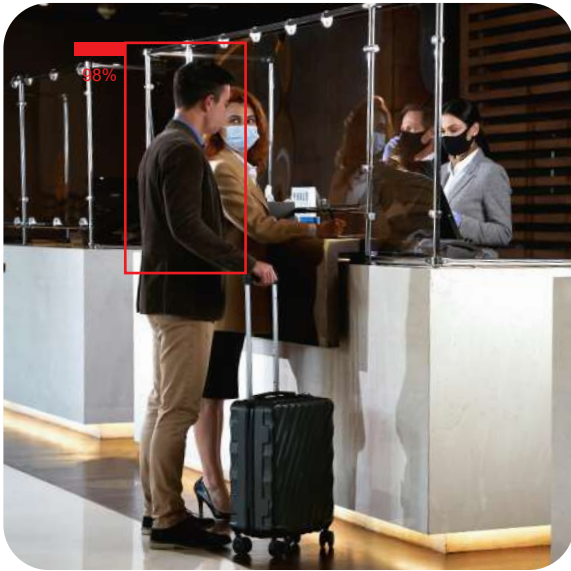
Analytics have proved their value in multiple settings, enabling faster detection verification and response. They enable staff – security or general operations teams – to deal with incidents more efficiently, in line with standard operating procedures, from accidents to criminal activity. And they support faster escalation to emergency response, from evacuations to area lockdowns.

Improved service

Highly accurate analytics now also make it easier to search recorded footage for specific persons of interest – from a lost child to a suspect – allowing hotel staff to retrieve relevant footage in minutes rather than hours, so that they can track movements and last sightings of any targeted individual. These tools, once the preserve of maximum-security operations, are now easy-to-use and affordable, and can make a significant contribution to improved customer service, whether that's through rapidly locating a vulnerable missing person, or investigating theft.

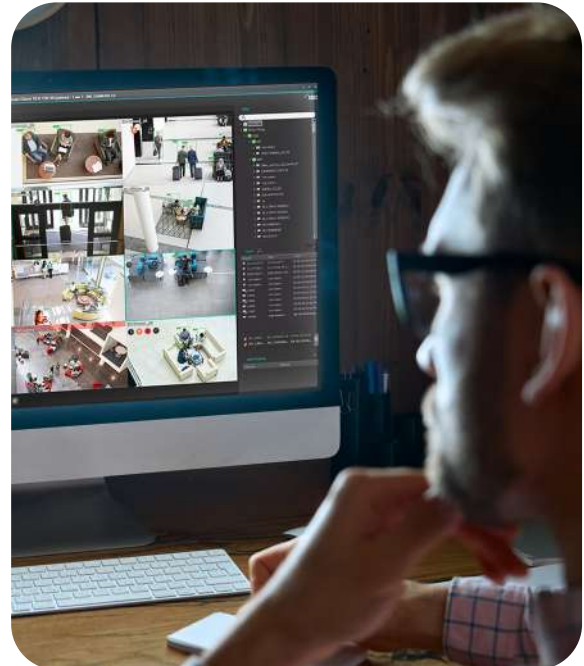


Infection-safe operations



More recently analytics have been developed for infection-safe operations, to make it easier for premises to continue operating during pandemic conditions, with functions including automated detection of building occupancy, social distancing, and mask-wearing. These simple but effective tools can be used to trigger reminder announcements, including for staff in service and food preparation areas, and help hotels to adapt quickly and demonstrate compliance with regulations.

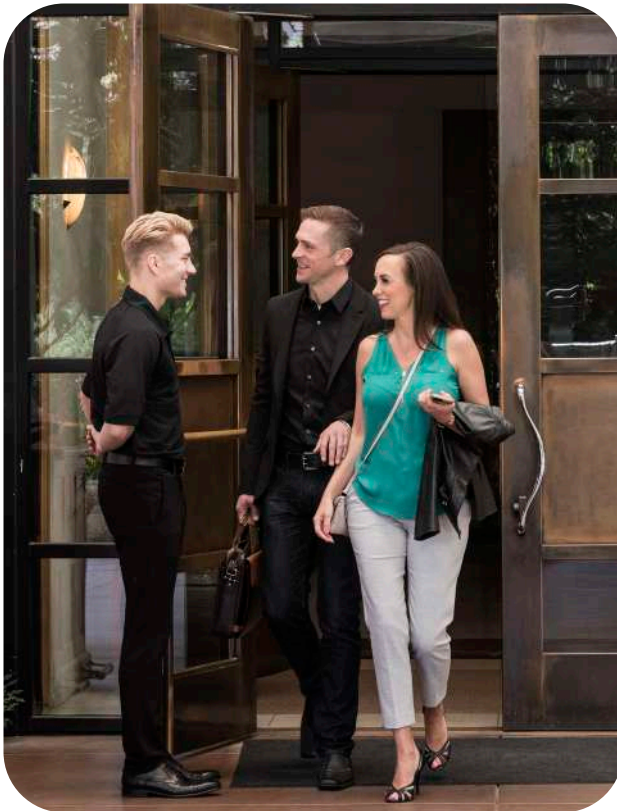
Video analytics such as heat mapping and queue monitoring are also being used to provide increasingly useful business intelligence around guest movements and activity, and the way visitors interact with staff and use hotel facilities. It can provide automated operational alerts – notifications to duty managers when queues and waiting times become problematic – and allow the analysis of longer-term trends and patterns of activity.



7. Getting the most from video

Video technology now delivers multiple benefits, when systems are designed well so that they are easy to use and affordable to maintain and run.

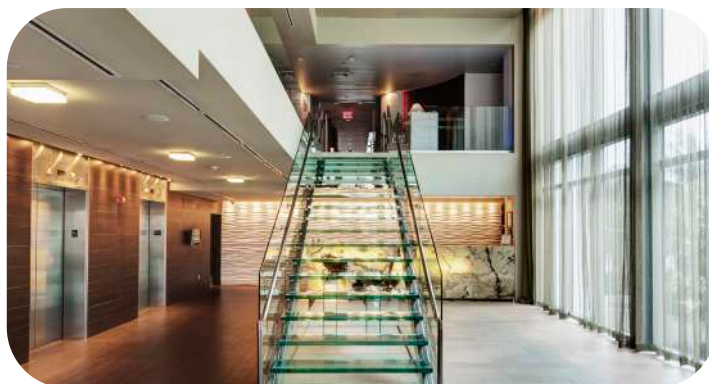
Key benefits include:

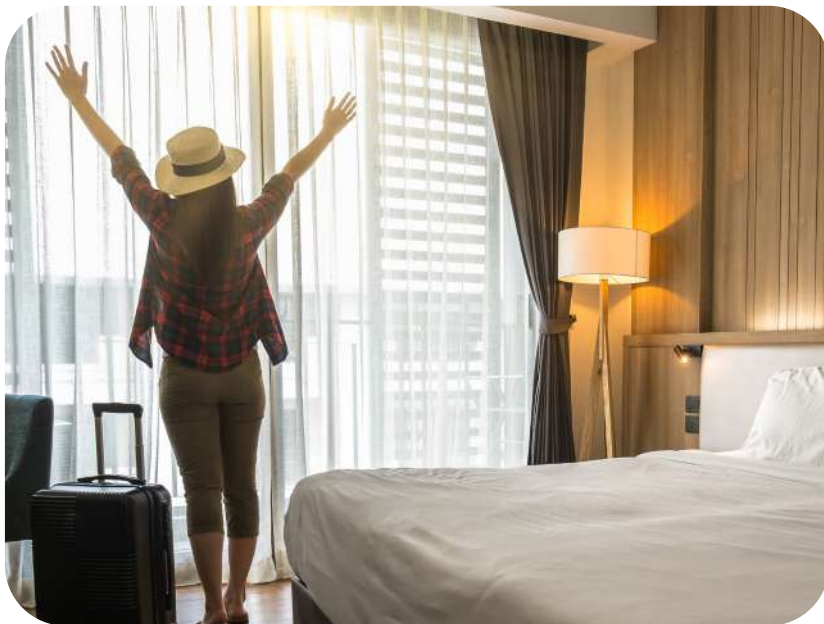


- Protecting guests and staff and meeting duty of care obligations and fire regulations.
 - Increasing situational awareness and preparedness for emergency incidents.
 - Reducing insurance premiums and liability.
 - Reducing vulnerability to bogus claims including slips, trips, and falls.
 - Resolving disputes quickly and with confidence.
 - Protecting the hotel's reputation, supporting the brand, and encouraging positive reviews and repeat custom.
 - Strengthening key corporate accounts with business customers that also have a duty of care towards staff and that will give preference to safer locations.
- Ensuring that operations run smoothly, front and back of house.
 - Empower security and operational teams with real-time visual awareness of activity from grounds and car parks to lobbies, from corridors to service areas.
 - Changing and refining staffing and procedures; directing resources more efficiently.
 - Identifying risks and operational challenges pre-emptively.



Crucially, video is being used by hotels to increase competitiveness and deliver better customer experiences. Its value is increasingly being understood and capitalised on – for example, allowing both remote and local visual checks regarding tidiness, service standards, and maintenance issues – and video is also underpinning consistency of guest experience from first arrival. With guests now focusing on enjoying a GOAT (Greatest Of All Trips) holiday following two years of lockdowns, their experience, and the service they enjoy must be nothing short of first class.





Through integration with databases and emerging technologies, including a new generation of powerful back-of-house and access control systems, video is enabling seamless or frictionless access, and giving reception staff real-time advance notice of arrivals and alerting them to likely spikes in demand at front desks.



As a result, hotels and hospitality businesses are making ever greater use of the functions that video provides. Most importantly, it's a technology that gives them the opportunity to stay ahead in increasingly competitive markets. By giving them a more accurate and complete picture of activity across their premises and grounds - from car parks to stairways, interior corridors, pool areas, gardens, and reception lobbies - video is empowering managers to make more informed decisions and better target their resources. In short, video solutions are helping to reduce risks, streamline operations, and create the best guest experience.



One Solution. One Company.



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