

January 2004

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Robert A. Brymer

Florida State University, null@fsu.edu

A.J Singh

Michigan State University, shbsirc@msu.edu

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Recommended Citation

Brymer, Robert A. and Singh, A.J (2004) "The International Hotel Industry in the New Millennium," *Hospitality Review*: Vol. 22 : Iss. 2 , Article 9.

Available at: <https://digitalcommons.fiu.edu/hospitalityreview/vol22/iss2/9>

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The International Hotel Industry in the New Millennium

Abstract

The top priorities of 170 hotel managers from 25 countries were identified as human capital, understanding customers, use of capital, alignment of stakeholder interests, use of information technology, and valuing brands in a Cornell University study.' The authors discuss how managers in a hotel's functional departments are ultimately responsible for addressing each of these concerns and issues.

Keywords

Hotel, lodging, International, Human Capital

The international hotel industry in the new millennium

by Robert A. Brymer
and A. J. Singh

The top priorities of 170 hotel managers from 25 countries were identified as human capital, understanding customers, use of capital, alignment of stakeholder interests, use of information technology, and valuing brands in a Cornell University study.¹ The authors discuss how managers in a hotel's functional departments are ultimately responsible for addressing each of these concerns and issues.

As the hotel industry progresses into the 21st Century, hotel managers need to anticipate and prepare for changes in the issues that will affect the functional departments of their hotels in the future. Whereas the original study by the Center for Hospitality Research at Cornell University helped to identify the current issues troubling hotel managers around the world, an investigation into future issues expected to affect hotel operations in the first decade of the new millennium was conducted. The

preliminary inquiry was undertaken to help alleviate uncertainties about the future and, more importantly, develop a research agenda on future issues confronting the international hotel industry.

The method of investigation chosen for this study was qualitative research. The structure of this research was in keeping with the goals of qualitative research, which are "designed to uncover motivations, reasons, impressions, perceptions and ideas that relevant individuals have about a subject of interest."² Typically, good qualitative research, which may include focused group discussions or individual interviews, is the foundation on which quantitative research is developed that ultimately draws inferences about the population at large.

This study conducted one to two-hour in-depth, individual interviews with 24 hotel general managers (GMs) operating hotels

in 13 countries: United States, Japan, China, Singapore, New Zealand, Australia, Egypt, Israel (Middle East and North Africa), Switzerland, Sweden, Netherlands, France, and Scotland (Western Europe). The hotels were carefully selected and represent a broad spectrum, which includes small, medium, and large hotels that were both independently owned and operated and part of a chain operation.

The typical respondent was a GM operating a 400-room hotel with an average occupancy of 74 percent, an average room rate of \$170, and an average of 427 employees, and having hotel management experience of 24 years. These international managers gave their views on changes they anticipate in the following functional departments of hotels in their respective countries/regions, by the year 2010:

- room division
- food and beverage
- sales and marketing
- human resources
- accounting and finance
- physical plant management and engineering

Improvement is cited

With technology being the primary enabler, hotel GMs in the U.S. indicated that services, facilities, and processes in hotels would improve. These changes will be visible in more efficient check-in

and check-out processes and in room amenities, with business hotels reflecting an “office away from an office” atmosphere. This will be driven by guest demand for all the support services and resources such as Internet access, updated tools, equipment, and telecommunication to enable them to conduct their business productively. Combined with increased technology, hotels will modernize their rooms, create innovative interior design features, and pay even more attention to quality factors. Implementing some of these changes may be an issue due to price resistance in some segments if the economy worsens. In general, it is a safe assumption that guests in the future will be more discriminating in their tastes and preferences.

Asian GMs respond

Japanese GMs mirrored the U.S. view of technological changes in the guest rooms and operational systems to improve guest service as well. In addition to an emphasis on business services, the Japanese felt more upgraded facilities to help travelers relax, such as Jacuzzi style tubs, were going to be more important. One hotel GM predicted the creation of “work stations” in Japanese hotel rooms.

While the implementation of technology in hotels was important for GMs interviewed in China, they felt that they were lagging as compared to the rest of the world. With an increasing number of multinational (China

was recently admitted into the WTO) companies doing business in China, it was predicted that there would be a shortage of business class hotels. As these changes occur and newer business hotels are developed, hotel technology will become more advanced, with a strong focus on customer service management databases, as observed by one general manager.

Hotel general managers in Singapore concurred with their Asian counterparts regarding the important role of technology in future hotel operations. However, the interviewed GMs emphasized the importance of rest and relaxation to make the guest experience more memorable. This included introducing spas, increasing the bathroom size, modernizing fixtures, and enhancing the sleep experience. Continuously meeting higher guest expectations will remain a challenge in the future.

General managers interviewed in New Zealand felt that the room styles in the future will change and will be similar to extended stay concepts with the inclusion of kitchens, dining tables, and a parlor area in addition to bedrooms. One of the GMs stated the critical role of housekeeping in improving guest satisfaction. The four Australian GMs interviewed were unanimous in their views about increased presence of technology in all facets of hotel operations, which include check-in/check-out, the use of Internet reservations, revenue

management, and guest rooms equipped with the latest technology to accommodate corporate travelers. In addition, the ambiance of the room will focus on art pieces and updated entertainment equipment such as wall mounted flat screen TVs.

Hi-tech rooms requested

Moving on to the land of the Pharaohs, Egyptian GMs predicted a surge in future hotels and resorts, with sophisticated design and décor. They felt that hi-tech, luxurious rooms, Internet access, better in-room entertainment options (such as wider choice of TV channels), and improved rooming processes will be the central focus of hotels in the future. However, they indicated that all these changes would be implemented without losing the "hi-touch" aspect of personal hospitality.

The need for "hi-tech – hi-touch" continued to another country in the Middle East: Israel. The GMs felt that the use of computers (and associated electronic communication mediums) would continue to create a sense of isolation. Therefore, guests will need to speak to someone. Despite the increase in technology in the rooming process, hotels will never replace humans to greet and welcome guests. One GM predicted smaller and more intimate hotels, with increased in-room entertainment technology as the key to competitive advantage.

Swiss GM predictions were more traditional and stressed the

need to maintain the basics of bathrooms, quality mattresses, and large rooms. However, they observed a trend toward younger, more affluent guests demanding quality service. The view of a GM interviewed in France was that guests would be willing to pay for better in-room technology and amenities. In Sweden, Internet access and focus on the bed, bathroom, television, and web-based reservation systems were viewed as the trend. As technology becomes more pervasive, they felt that employee training needs to be continuously updated.

A GM in the Netherlands predicted an increase in outsourcing for housekeeping services, a trend already started. Once again, unique room features, Internet access, and quality were stressed as important value creating features. Scottish GMs stressed that technological tools such as video conferencing may become popular hotel features in the future. Furthermore, the distinction in amenities offered in upscale vs. mid-priced hotels is declining, which will place more pressure on upscale hotels to offer more value-creating amenities.

Dining is important

U.S.-based GMs stated that in-house dining will become even more important to deluxe hotels. Hotels will have to create new things that “wow” the guests. These may include celebrity chefs, outsourced branded restaurants within hotels, and focus on fresh-

ness and quality of products. Hotels will have to look at new sources of revenue in their food and beverage operations. This may include reviewing room service operations and increasing the focus on catering and special events. Special events will become more elaborate and specialized, according to one of the GMs interviewed.

Most Japanese hotels have a higher percentage of their revenue from food and beverage versus rooms. This is because societies driven by tradition tend to spend more on the ritualized relationship building occasions. As such, banquet, catering, and weddings will remain a staple revenue source for larger hotels. However, as in the case of U.S. hotels, Japanese hotel managers are looking for new sources of revenue to enhance food and beverage operations. Regional cuisines and free-standing restaurants in hotels are some of the new approaches being considered. In China, the threat to food and beverage within hotels is expected to come from the new entrepreneurial climate resulting in more eating options outside the hotel.

The focus for hotel food and beverage departments in Singapore will be on operational restructuring and efficiencies. As such, hotel organizations are looking to combine skill sets of the chef and food and beverage director into a combined position. As Singapore is a restaurant paradise, hotel food and beverage operations will

continue to think of new ways to promote in-house dining to their guests and local customers. This will be done by an emphasis on quality, diversification in food and beverage outlets, and creation of new signature outlets to attract local customers.

Competition is factor

As in the case of China, New Zealand GMs see more pressure on a hotel to compete with external restaurants. Banquets and celebrity chef outsourcing are new trends, which are expected to continue. Australian hotels are also combating the negative image of hotel food. One GM felt that there would be fewer food and beverage outlets in hotels and more independent proprietors managing/leasing restaurants in hotels since there is not much profit in food and beverage. However, hotel food and beverage, in order to adapt, will have to offer and adjust menus, bars, room service, and dining room. In addition, they will need to offer new regional cuisines, such as Asian style cuisine, which is becoming popular in Sydney. It is becoming increasingly important for food and beverage outlets to become independent profit centers.

Egyptian GMs preferred to keep the traditional method with food courts offering a variety of restaurants. Some of the trends include more guest options by including outside delivery choices, thematic restaurants, and promotions of Egyptian wine.

Some of the emerging trends for hotels in Israel include cooking staff being involved in the service of food and thus having more guest contact. Recruiting qualified food and beverage staff will remain a challenge in Israel.

One Swiss GM observed that younger guests are more food conscious and want to learn about the source and quality of the food. Organic food is receiving higher premiums from this segment. Restaurant outsourcing will continue as a trend and guest expectations of consistency and standardization of service will increase.

The implementation of a 35-hour work week in France is posing an organizational challenge for restaurant operations. As a result, restaurant management will have to plan better and hire additional staff. The Swedish hotel GM interviewed felt that outsourcing would continue in food and beverage operations in his country and hotel management will focus on the rooms department as the major generator of cash flow. General managers in Scotland expressed similar sentiments: increase in outsourcing and focus on rooms.

Marketing, sales increase

Hotel GMs in the U.S. predicted that there would be more emphasis on third party partnership marketing with the airlines, credit card companies, major retailers, and even other hotels. The room-booking window in the future will be shorter: six

months or less in advance. The marketing function will be more aggressive in an environment with flat demand, and each hotel will need to focus on product differentiation more than before. One GM predicted an increase in international guests to the U.S., which certainly looks like a plausible scenario in view of the declining value of the dollar. Another GM predicted that advances in database marketing will help hotels retain and identify new market segments.

One of the GMs interviewed predicted a further segmentation of the Japanese hotel industry with the development of resorts and business hotels. Meetings and events were seen as the growth market in the near future. However, the increase in Internet-based third party booking sites has created a culture of price sensitive guests. This will pose more of a challenge for luxury hotels that previously competed on the basis of product differentiation. The increasing transparency of pricing will result in further discounting of luxury hotels in Japan.

Internet is factor

One Chinese GM interviewed said the Internet is a boom for hoteliers which will enable them to potentially increase their market size, while the increase in international visitor arrivals is expected to continue. As domestic and multinational companies grow in size, growth in domestic business travel is a logical extension. However,

competition among hotels will become fiercer with an investment climate conducive to growth and development. While the current political climate is business friendly, it is difficult to predict how the political environment will be for the next 10 years. The GMs interviewed in Singapore are viewing the Internet distribution channels in a positive light as well. They view them as a tool to increase market size and market share. However, one GM predicted that a hotel's reputation would remain its best sales and promotion tool through word of mouth advertising.

In New Zealand and Australia, it appears that Internet booking engines are replacing travel agents at a fast pace; therefore, the shift to the Internet as a distribution channel may grow at a faster rate. This will result in making websites more interesting, efficient, and easy to use. While this may be true for transient business, wholesale travel agencies and tour companies remain strong. An interesting observation was that the increase in merger and consolidation activities within companies will shift the demand dynamics in favor of the customer since there will be fewer (larger) companies to whom hotels will have to market. As a result, hotels will have to widen and diversify their demand bases, so that they are not overly dependent upon one or two companies for the bulk of their business. The target market group of the future is affluent and younger than its predecessor groups.

The competitive landscape in Cairo is expected to see a radical increase due to the burgeoning supply of hotel rooms. All of this will place a downward pressure on room rates. Some companies may not survive in this competitive environment, resulting in a more consolidated hotel industry. As in the case of Australia, GMs in Israel feel that the Internet is slowly replacing the traditionally strong role of the travel agency; 80 percent of current bookings are through travel agents. Since hotels cannot directly negotiate through the Internet, service quality, branding, and reputation will gain more prominence. As with any new phenomenon, an understanding of the full capabilities (limitations and opportunities) of Internet bookings is important in the future.

In the words of a GM in Switzerland, the use of the Internet has resulted a new term, "mixed marketing," which is a combination of traditional and new booking mediums. The marketing function needs to remain tuned to changes in this area so they are able to adapt strategies. Some of the sales and marketing sentiments expressed by GMs in Sweden and the Netherlands were "user-friendly websites," "define your goals and concepts, build good reputations," "aggressive with sales," "increased centralization with large hotels," "increase in repeat guests," "active selling," and "search for new markets." A GM in Scotland indicated the increasing trend in branded hotels at the

expense of independents. As a result, they will see the new concept of "cross-selling" hotels within the network of hotels.

Finance requires role

A hotel GM in the U.S. predicted that they would have to work with hotel owners more closely, understanding their financial picture and priorities. There will be more clustering of accounting functions within an area, (e.g., all the hotels in one company in the New York City area will have their accounting activities processed in one common office). As owners are becoming increasingly demanding, with higher rates of return expectations, the management team will have more pressure to achieve GOP results. As such, they will be expected to take a more active role in reviewing the financial side of the operation. Pressure on labor costs will result from an increase in the cost of new employee benefits such as child care and elder care.

Challenges in Japan include room discounting which will make it harder to meet investor rates of return requirements. The trend in the Japanese hotel industry is pointing toward consolidation, with the emergence of five or six major hotel companies.

Structural changes in the Chinese hotel industry include the privatization of unprofitable, state-owned hotels. It is expected that this change will benefit the industry as the new owners upgrade and improve these prop-

erties. In general, as China moves closer to western-style business systems, there will be more efficient and standardized financial reporting systems. Cash flow versus property appreciation will be the primary driver of total returns for hotels in Singapore. This, in turn, will place more emphasis on operations profitability. Future profits will depend upon the extent to which technology makes operations more efficient (therefore reducing costs) and the price of labor. Hotels will have to introduce innovative programs to monitor and reduce costs, such as those that reduce defects and minimize waste.

In New Zealand, governmental legislative actions will determine some financial reporting requirements. Management information system upgrades will continue to improve financial reporting. A GM stated that Australian hotels have had poor returns on investment with high development costs and relatively high operating costs (mainly labor), so shareholder value has decreased. Each department needs to justify its costs and be evaluated based on its profit or cost reduction potential. In this environment, financial reporting needs to be accurate and timely, which the GMs predict will be more centralized and driven by electronics.

With the increasing use of computerized back office systems, hotels in Egypt and Israel will have more streamlined systems and cut out overlapping functions.

Overall, computer systems will be an effective tool to improve overall financial decision making. Departments will save costs by electronically interfacing with suppliers to order their own supplies.

Swiss hotel GMs predict fewer employees in the accounting department. Once again, as investor needs become more stringent, management performance is critical. As one GM predicted, the focus has shifted from long term to shorter term goals and returns, with information analysis becoming a more important decision making tool. A hotel GM in Sweden recommended the use of cash flow models to forecast investment returns, therefore, focus on predictive versus reactive financial management. In the Netherlands, a GM anticipates an increase in online accounting. In Scotland, the move has been in favor of decentralized accounting, a trend expected to continue in the future. This is especially true in the case of chain operations. Management information systems are expected to continuously improve financial reporting.

Recruitment issues dominate

Going forward into the new millennium, U.S. GMs predicted that recruiting and retention issues would dominate human resource management issues for some time. Selecting the right people will continue to be a priority. As the pool of qualified individuals declines, human resource departments will have to improve the entire selection

process, which includes screening tests to match the candidates with the right jobs and avoid needless turnover due to poor job matching.

This sentiment reverberated in Asia as well, where Japanese GMs said that there will be staff shortages of willing, hard working, and skilled employees. As noted by one GM, in the future, more emphasis will be placed on a manager's academic background because of the increased demands on managers.

As the entry-level skill set of employees will be lower in the future, training will become more important. Chinese GMs felt that as businesses in China grow, the need for qualified labor will be acute. A premium will be placed on employees with an exposure to Western education. Furthermore, as new businesses (not necessarily hotels) develop in China, hotels will face turnover because of an increase in job opportunities for both management and line employees. This may push Chinese hotel management to reevaluate organizational structure, compensation policies, and other strategic human resource management issues. Singapore, which has had a more developed hotel industry than China and Japan, faces the same turnover problems. As such, the GMs interviewed stated that employee motivation, employee interaction, and training will become even more important human resource issues.

Even though recruiting and staff retention were issues for

GMs in New Zealand, they felt that new technology would increase productivity, thus, reduce labor dependency. However, as some of the new employment contracts are more stringent, employers may have less leverage in influencing employee job performance. As the nature of international guests becomes more multicultural, this will be reflected in the hotel's hiring policies and training programs.

Skilled positions have shortage

The shortage of employees was a theme which Australian GMs voiced as well. This was particularly acute in specialized and high skill positions such as chefs. Some of the reasons might be that hotels are not attractive as a career choice, that larger companies offer better compensation packages, and that there are overall low salaries in the industry. However, they added different perspectives on how that would affect the way hotels are operated. First, part-time positions would increase in proportion to full-time jobs. This would result in hotels reorganizing with a smaller and smarter workforce. Certain specialized positions such as chefs are starting to develop their own companies and lease their services to hotels. Views on employee relations included having a zero tolerance policy with regard to organizational commitment, involving employees in decision-making (empowerment), and providing inspiration,

motivation on career paths, and ongoing training.

A GM in Egypt stressed the critical importance of the human resources department today by saying, "We now know how to deal with humans; therefore human resources are becoming more important." Hotels in Israel are combating recruitment issues by using new immigrants from Russia as a potential source of employees, especially in low skill positions. This may alleviate their short-term hiring problems; however, long-term solutions are needed.

Not surprisingly, it is becoming clear that the shortage of employees is a global problem. General managers in Switzerland, France, Sweden, and the Netherlands all face similar predicaments, which may be summed up as: "It is difficult to find good quality personnel." Swiss hotels are addressing the issue by paying more to attract employees, searching the international labor markets, and becoming better employers. A French GM said that hotel schools should do a better job of attracting students to the field. The Swedes felt that hotel human resource departments should view employees as assets and guide their growth in the organization. Furthermore, human resource policies should reflect the presence of diversity in the workforce, such as older and younger workers occupying the same space. A GM in the Netherlands suggested the use of the Internet to advertise positions, and, finally, the Scottish GMs

suggested increasing the intensity of training by implementing minimum standards, use of performance bonuses and working with colleges and universities as solutions to staffing issues.

Technology plays role

Technology presents both challenges and opportunities for the engineering departments of U.S.-based hotels. While hotels have traditionally been considered technology laggards, the GMs interviewed indicated that hotels would become more and more technology-oriented in the future. The technology will be more sophisticated, helping us to understand where to save and how to select the best options to improve efficiency. In order to remain competitive, hotels will have to update their technology more frequently. This will include new technology and a different "look" in the hotel. As energy management systems become more cost effective, property design will be used more to control energy costs and other common engineering expenses. These may be features built into the initial hotel structure. While traditionally engineering departments focus on mechanical and structural issues, as the hotel becomes more networked, hotel engineering staff will need to be more knowledgeable about networked systems.

Japanese, Chinese, and GMs in Singapore also predicted more technologically-oriented hotels, and the accompanying need for improving the staff's technical

knowledge. They felt hotels and guests would benefit from energy efficient systems and higher quality in-room technology.

A New Zealand GM predicted the use of automation and advances in technology will replace and become a substitute for human interaction. To the extent that guests will value impersonal efficiency over personal, albeit imperfect, interactions with human contact, this prediction may come true.

A GM in Australia predicted that hotel designs would be smarter and more customized to the lifestyle being targeted. Non-revenue generating public spaces may become smaller in future hotels. Building efficient structures, which are quicker to build and more inexpensive to maintain, will be important in all new structures. Preventive maintenance programs will continue to be the best on-going building and asset maintenance program. However, new technologies will require hotel engineers to continuously update and maintain their specializations and trade skills.

General managers in Egypt are seeing engineering equipment changing for air conditioning and electricity. The improved technology is expected to improve energy efficiency.

In Israel, GMs stressed the role of information technology in connecting engineering systems. However, no dramatic changes are expected.

Some of the technological

trends affecting the engineering operations in Switzerland, France, Sweden, Netherlands, and Scotland include in-room Internet connectivity, personnel training in new technologies, and technology maintenance outsourcing and constant upgrades. In Scotland one of the GMs stressed that hotels will use less expensive energy sources and implement new environmental conservation programs within engineering systems.

Similarities exist

The feedback from hotel GMs around the world demonstrates that there are some unique perspectives on the future, but there are even more similarities on how they view hotel operations in the first decade of the new millennium. Even with the broad range of cultural, political, social, environmental, and economic platforms these GMs face in their countries, it is apparent that many issues unite the global hotel industry and its future development. Despite what may seem to be several obvious differences, there are more similarities in what the GMs express than there are differences. The hotel industry is truly emerging as a global industry, one that shares opportunities and challenges more than ever.

Future themes articulated consistently by many GMs from different countries and regions of the world include the following commonalities:

- **Rooms division management:** Hotels will continue to

increase technological applications to better serve guests, (e.g., check-in and check-out processes). General managers recognize that guests are becoming more demanding and discriminating in guest room amenities offered. Hotels will incorporate state-of-the-art technology, telecommunications, equipment, Internet access, etc., to create mini-work stations. There will also be increased emphasis on guest room design/spaciousness, décor, bathroom sizes and fixtures, comfortable bedding, and entertainment accessories that invoke a relaxed homelike atmosphere. In short, guest rooms will continue to evolve in ways to enhance work and relaxation space.

- **Food and beverage management:** The GMs indicated that competition from restaurants outside the hotels would increasingly pose a threat to hotel restaurants. They expressed a need to be more creative in food and beverage, and many believe that outsourcing hotel restaurants will become more widely accepted. The GMs stated that free-standing signature restaurants, celebrity chefs, and creating a “wow” factor with high quality food, unique menu choices, and service delivery would be essential for the survival of hotel restaurants. They also stated that new revenue sources from special events/catering and room service would play a larger role in the success of food and beverage management.

- **Marketing and sales:** One of

the most pervasive marketing and sales changes for the future identified by the GMs in this study was technology, especially the high volume of Internet marketing. Traditional marketing and sales practices are still essential, but the growing emphasis on “mixed marketing” also includes third-party websites and less contact with travel agents.

The GMs also pointed to the increasing competition from hotel development, which places a downward pressure on room rates, necessitating more aggressive marketing and sales in the future. This will create more user-friendly websites, more alliances with airlines, credit card companies, retailers, consolidation of hotels into larger companies, and even “cross-selling” of competitive hotels. Hotels will host more international travelers and will rely on service quality, branding, and their reputation for future success.

- **Finance and accounting:** Hotel GMs will continue to interface more with hotel owners and be held accountable for the financial success of their hotels. Higher rates of return, profitability, and cash flow will face challenges from rate discounting. The financial reporting systems will be more accurate, streamlined, technology based, employ fewer personnel, and utilize models that rely more on predictive versus reactive financial management. Labor cost increases are a major concern for the future, and GMs will have to

find other ways to reduce costs, defects, and waste while improving efficiency.

• **Human resources:** The most pressing issue facing hotels this decade is a shortage of willing, hard working, skilled workers. The GMs identified recruiting, selecting, and retaining excellent employees a high priority. The reduced labor pool will lead some hotels to outsource certain departments, hire immigrants to fill low skilled positions when necessary, and utilize more technology. General managers are also working hard to reduce turnover by placing the right people in the right job, motivating, empowering, training, improving compensation packages, and improving the overall working environment for employees.

• **Plant management, engineering:** The emphasis in this area hinges on more sophisticated technology and networked systems to improve operational efficiency, while reducing costs. Hotels will continue to build more efficient physical plants to stay competitive, facilities that are smarter and less expensive to maintain. The GMs and their managers must stay updated, as future hotels will continue to improve energy management systems, weigh environmental concerns, and incorporate the newest technological advances.

The common thread in the GM feedback is that virtually every area of hotel operations tomorrow

will be impacted by technology and creativity. The GMs in this decade must be willing to stay abreast of fast-paced changing technology, while blending it with innovative approaches to traditional operational systems. The role of GMs tomorrow is more complex worldwide and how they operate hotels is greatly influenced by the country and region in which they are located. However, feedback from this study suggests that these GMs face many similar challenges and opportunities. General managers can learn from each other regardless of where they might be located. Educating and training GMs in current systems, while building their creative approaches to leadership, will be vitally important to the success of their hotels in the future.

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Robert A. Brymer is a professor of hotel management in the Dedman School of Hospitality/College of Business at Florida State University and **A. J. Singh** is an assistant professor in the School of Hospitality Business at Michigan State University.