













Total Decision-Making Ability Score Ranked by Industry

- 1  Mining
- 2  Professional, Scientific & Technical Services
- 3  Transportation, Postal & Warehousing
- 4  Construction
- 5  Financial Services or Insurance
- 6  Manufacturing
- 7  **Accommodation, Hospitality & Food Service**
- 8  Electricity, Gas, Water & Waste Services
- 9  Wholesale Trade
- 10  Healthcare & Pharmaceuticals
- 11  Retail Trade
- 12  Government, Education & Non-Profit

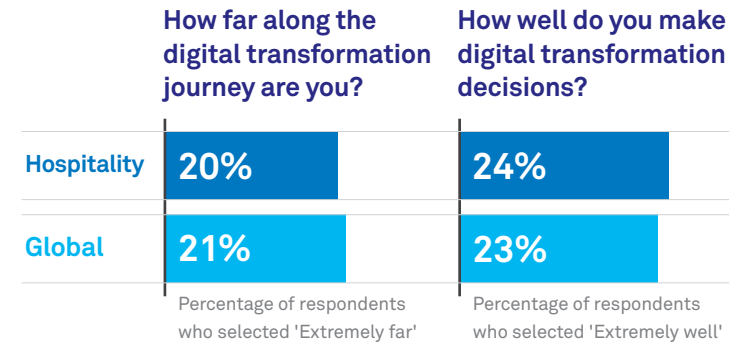
Digital Transformation Decision-Making in Hospitality



How does decision-making shape digital transformation outcomes in the hospitality industry, spanning accommodation, hospitality and food services? To find out, Telstra surveyed 3,810 executives in 14 markets and 12 industries worldwide.

How does hospitality compare with other industries?

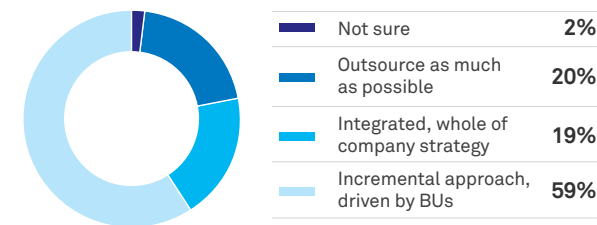
The hospitality industry sits in the middle of the pack when it comes to digital transformation decision-making, ranking seventh.



How can hospitality make better digital decisions?

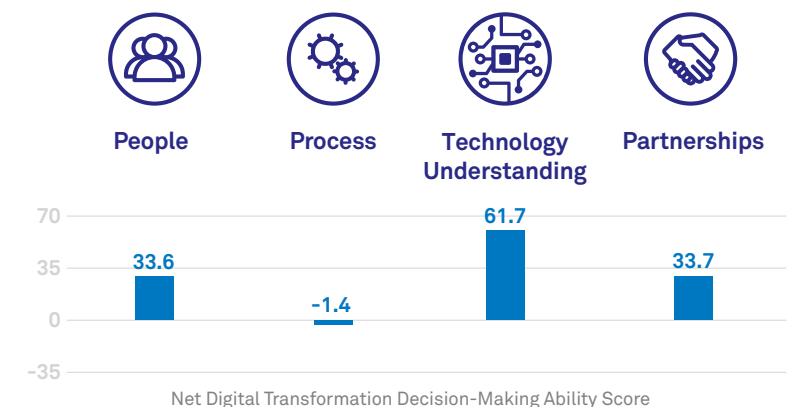
Move beyond an incremental approach to digital transformation.

Hospitality businesses' digital transformation projects are driven mainly by individual business units.



Focus on more than just technology and processes for digital decisions.

Hospitality businesses pick their understanding of technology over other decision-making factors when evaluating their digital transformation process.



Closing the digital priorities performance gap

Hospitality businesses struggle to meet their top digital transformation priorities, with all top ranking goals scoring among the bottom of the 17 priorities when it comes to performance.

Top three digital transformation priorities



#1

Deliver great, consistent customer experiences across global operations

Rank in performance
13th



#2

Take advantage of opportunities in new global markets

Rank in performance
15th



#3

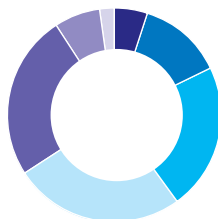
Protect, detect and respond in real-time to events

Rank in performance
14th

Hospitality IT spend (USD) expected to rise

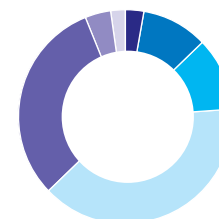
Three quarters of hospitality businesses say they will increase their IT spend in the next three years. More than a third spent more than \$500,000 in the previous year.

Previous year IT spend



Less than \$1,000	5%
\$1,000 to \$9,999	13%
\$10k to \$99k	22%
\$100k to \$499k	26%
\$500k to \$999k	25%
\$1m to \$4.9m	7%
More than \$5m	2%

Expected change in IT spend for next three years



More than -10%	3%
-1% to -10%	10%
No change	11%
+1% to +10%	39%
+11% to +20%	31%
+21% to +30%	4%
More than +30%	2%

Top hospitality partner attributes

Hospitality businesses seek digital transformation partners that have relevant experience and strategic insights.



Relevant knowledge about my company and industry



Clear expertise and experience with IT offerings at both a hardware and software level



Ability to determine which IT model best fits my company and my needs



For more insights, visit telstraglobal.com/disruptive-decision to download the Disruptive Decision-Making white paper.