

Hotelier MIDDLE EAST
HOUSEKEEPING
REPORT 2016

CONTENTS

JULY 2016

1. WELCOME.....	1
2. ABSTRACT	2
3. SAMPLE DETAILS.....	3
4. KEEPING UP WITH THE SOPS.....	3
5. EQUIPMENT, INVENTORY AND SOFTWARE.....	4
6. THE OUTSOURCING OBSTACLE	6
7. LOOKING AFTER THE ENVIRONMENT.....	8
8. LAUNDRY AS REVENUE SOURCE	9
9. SENTIMENT: CHALLENGES AND OPPORTUNITIES.....	11
10. CAREER PATHS	12
11. CONCLUSIONS	13
12. ACKNOWLEDGEMENTS.....	13

Hotelier

MIDDLE EAST

1. WELCOME

The challenges facing the Middle East's hospitality industry have been well documented in recent months. After years of impressive growth, high RevPAR figures and robust occupancy rates, 2015 witnessed these figures come under sustained pressure. Although the hotel industry in the region is still in fine health when compared to other markets, growing maturity has brought with it clear challenges.

The top end of the market is oversubscribed and with more five-star properties on the opening schedule, competition for tourist dollars will only intensify. The mid-market is also experiencing rapid growth, as international and local hotel operators seek to exploit the emerging business opportunity outside the region's traditional high end focus.

According to STR's June 2016 Pipeline report there are 154,576 rooms, in 550 hotels 'under contract' in the Middle

East, and over 81,000 rooms actually under construction.

A packed hotel pipeline, combined with a maturing market, tumbling oil prices and tough economic conditions in core markets from Europe, through Russia and China have contributed to pessimistic growth forecasts for much of the regional hospitality industry.

As fierce market competition becomes the norm, hotel management firms will have to innovate to differentiate their products. This means reexamining their operations in an attempt to find better, more efficient ways of working. Whether that gives rise to a growing focus on the use of information technology, a shift to use of outsourcing service providers, or a greater focus on sustainable solutions designed to reduce operating costs has yet to be seen.

What is clear, is that housekeepers have a vital role to play if hotels are to address key operational inefficiencies and streamline their operation.

HOUSEKEEPING REPORT 2016

2. Abstract

This report outlines the key findings from The *Hotelier Middle East Housekeeping Survey*, the trends dominating hospitality housekeeping, and the analysis of these results against the market outlook, with a commentary on the key issues from experts in the field. *The Hotelier Middle East Housekeeping Report* provides essential business insight into this critical hotel function, revealing a gradual move towards the use of automated management and a commitment to sustainability, concerns over recruitment, retention and staff outsourcing, and the potential to deliver much more, if only the industry's "image problem" can be reversed.

Eighty-three hotel housekeeping professionals completed *The Hotelier Middle East Housekeeping Survey* between April and June 2016. The sample is a senior group of industry professionals, 88% at manager level or above, with exactly half either holding the position of director of housekeeping (46%), director of laundry or director of rooms. The overwhelming majority of respondents is based in the UAE, with 77% based in Dubai and 13% in Abu Dhabi.

Together they represent more than 80 hotels comprising approximately 31,450 rooms and employing around 7,225 staff in the hotel housekeeping department. Add to this outsourced or agency staff and our respondents are collectively responsible for a housekeeping workforce of 10,300 people.

More than two thirds of respondents have in-house teams of less than 100 staff, 19% have teams of between 101 and 150 staff and at the opposite end of the scale, 3% have housekeeping teams of 500+ employees.

Four fifths (79%) of the hotels represented in the *Housekeeping Survey* are five-star properties, with respondents coming from a mix of business (47%) and leisure (35%) hotels, while 18% of the sample work at either hotel apartments or serviced residences. Two thirds of respondents work for international hotel brands; 21% represent local brands; and 13% said they worked for independent hotel properties.

They're a busy group of professionals; reflecting on Q1 2016, 80% of the respondents reported average hotel occupancy of 70% or higher. Breaking this down, and 21% had occupancy of 70-80%; 36% reported occupancy of 80-90% and 23% were nearly full, with occupancy in the 90th percentile. Only 3% reported occupancy of less than 40%.

3. Sample details

Contrary to common perceptions, housekeeping in the Middle East is a male dominated profession, with two thirds (65%) of respondents' male and just one third (35%) female. Ages varied between 25 and 50 plus, but the majority of respondents (49%) are in the 30-40 age bracket, and 29% are aged between 41 and 50. The vast majority of respondents – 81% – have more than 10 years' experience in the hotel industry, and 74% have worked specifically in a hotel housekeeping department for more than 10 years. Twenty-eight percent have been working as hotel housekeeping professionals for over 20 years.

As is typical for the Middle East hotel industry, the respondents are of varying nationalities, although the majority – 61% – are from the Indian subcontinent, Southern Asia and Southeast Asia. The rest come mainly from Western Europe (15%), Middle East and North Africa (7%), and US and Canada (6%).

The respondents have an impressive educational background, with 94% completing high school qualifications up to the age of 18; 75% receiving a college diploma; and 54% educated to university degree level. More than two thirds of respondents – 70% – studied hotel management after school or university (see Fig 1). For most, the housekeeping profession was a carefully sought out career, with three quarters of respondents revealing that they had specifically pursued a career in hotel housekeeping.

4. Keeping up with SOPs

Each hotel department has its own standard operating procedures (SOPs). Looking at the industry as a whole it seems these vary significantly from hotel to hotel, with no set norm for the profession.

Take the time assigned to clean a room – this varied dramatically among our respondents from 10 minutes to 45 minutes-plus (see Fig 2). The category of hotel, whether five-star or three-star, had very little bearing on the results either, with the disparity occurring regardless of the segment.

Overall, 18% of respondents spent 25 minutes cleaning a standard room; 19% of respondents spent 30 minutes; 9% recorded 35 minutes; 20% took 40 minutes; and 19% said they assigned 45-minutes-plus to clean each room. The weighted mean average for length of time taken to clean a standard hotel room is 33.5 minutes.

FIG 1: Did you study hotel management or similar, after school or university?

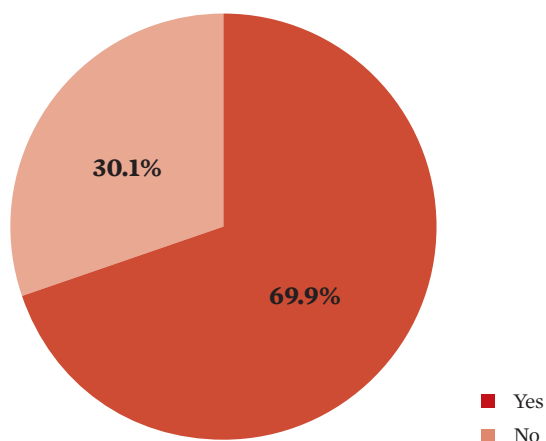


FIG 2: What is the length of time assigned to clean a standard room in your hotel?

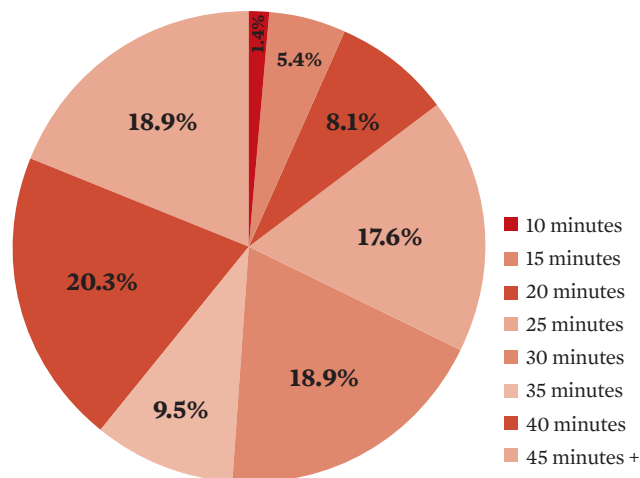
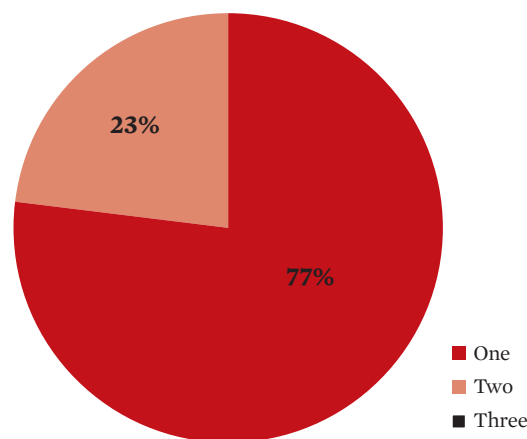


FIG 3: How many housekeepers are assigned to clean one room?



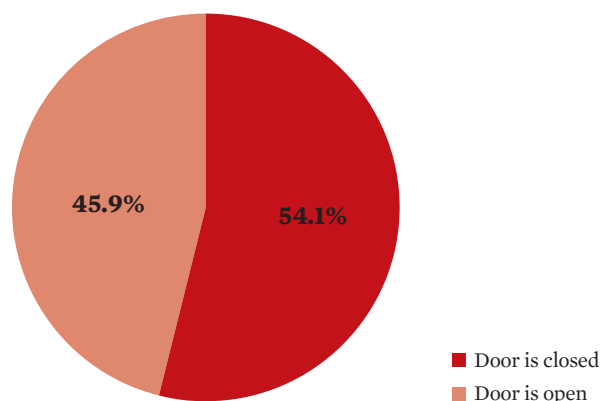
A five or 10 minute time difference may seem small, but with the (modal) average respondent working at a hotel with between 201 and 300 rooms, whether standard cleaning time is 25, 35 or 45 minutes can significantly impact the all-important cleaning rota – more on that later.

Historically, much has been spoken about the need to assign two room attendants per room – for the mutual protection of guests and staff (see Fig 3). But times have changed and efficiency it seems is now the order of the day. More than three quarters of those surveyed reported that one housekeeper was assigned to clean one room. Twenty-three percent assigned two staff per room.

At Taj Dubai, director of rooms Sharon Buenaventura, says that the health and safety of room attendants is paramount and that working in pairs is advisable for rooms that are larger than 30 square metres.

“If room attendants clean 10 to 12 rooms that measure 30 square metres each, then they would not need someone to assist them as long as they are equipped with proper tools,” she adds.

The group was fairly evenly split regarding the question of whether rooms are cleaned with the door open or closed (see Fig 4). Here, 54% of respondents enforced a closed-door policy while 46% of respondents clean rooms with an open door.

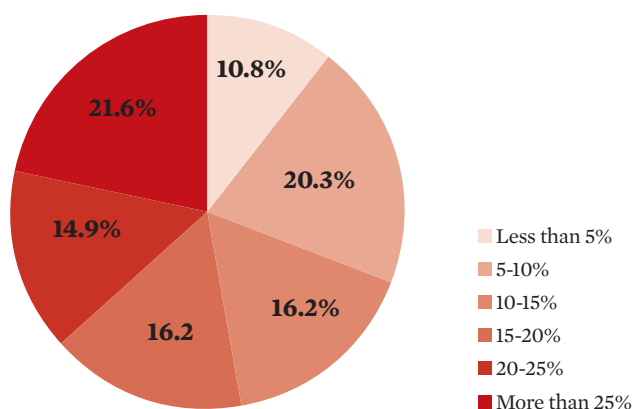
FIG 4: Do you clean rooms with the door open or closed?

According to Franziska Purkert, corporate director housekeeping – operations at Rotana Hotel Management Corporation, the door can be open, but the doorway “should always be blocked by the housekeeping trolley to avoid the wrong guest entering the room”. With large rooms or suites, the room attendant may not be able to hear a guest enter, so caution means the door should either be closed or the entrance blocked. It’s best to add a “housekeeping is servicing your room” sign to avoid surprising the guest, adds Purkert.

Comparing the above two results, of those respondents that said two attendants were assigned to each room, 71% follow a closed-door policy. For those respondents that use just one attendant per room, 49% employ a closed-door policy compared to 51% insisting upon open door.

There were also very mixed results regarding room inspections from senior team members – assistant housekeeper grade and above. Only 22% of respondents said that a supervisor checked more than 25% rooms every day. Eleven percent of respondents said less than 5% of rooms received inspection (see Fig 5).

A similar pattern emerged regarding the length of time assigned to clean a room after check-out. Respondents were fairly evenly split between assigning 30 minutes (14%), 35 minutes (16%), 45 minutes (23%) and 55 minutes (16%). Seven percent said they allocated more than one hour per room. The weighted average for the length of time to clean a room post check-out is 41.5 minutes – only eight minutes longer than a standard occupied room clean.

FIG 5: What percentage of rooms does an assistant grade housekeeping manager or higher grade housekeeper inspect every day?

Average time assigned to clean a standard occupied room: **33.5 minutes**

Average time assigned to clean a standard room after check out: **41.5 minutes**

Deep cleaning requirements are not clearly defined either. Forty percent of respondents said they would deep clean rooms every 1-3 months, but 30% answered every 3-6 months, 23% said it would be twice a year and 7% admitted to only deep cleaning once a year. Public areas fared better; 74% of respondents, said public areas receive a deep clean at least every 1-to-3 months.

The only area of in-room cleaning in which there is more consistency is regarding turndown. The vast majority of respondents (72%) allocate 10 minutes to turndown in a standard room; 24% allow 15 minutes; and 4% spend more than 20 minutes.

Discrepancies in operational procedures between properties occur for a variety of reasons, such as the impact of brand standards, resourcing and quality control. A system to streamline housekeeping SOPs could be very useful from a training point of view, but in reality, the brand will always need to dictate the process most suited to its hotels and guests.

5. Equipment, inventory and software

The *Hotelier Middle East Housekeeping Survey* explored whether housekeepers have sufficient equipment and software to enable them to conduct their roles efficiently. Several hotel brands, such as Renaissance, Marriott and Ritz-Carlton in the US, have in recent years extolled the virtues of having housekeeping closets on each hotel floor, with facilities for linen and amenities storage, and thereby doing away with the use of the usual trolleys. A cartless housekeeping programme has several obvious benefits: it reduces hallway clutter, keeps an “air of magic” regarding room cleaning, reduces health and safety risks caused by pushing heavy carts, decreases the likelihood of amenity theft from trolleys, and increases productivity, with the time spent on loading and unloading trolleys saved. Instead portable vacuum cleaners and small caddies can be used, with room attendants carrying only the essentials.

However, in the UAE, despite the raft of hotels that have opened in recent years, it seems very few have been designed to accommodate storage closets on guest room floors. Seven percent of respondents said they use closets compared to 63% that rely on trolleys or carts. Most interestingly, 30% of respondents said they use both closets and trolleys (see Fig 6).

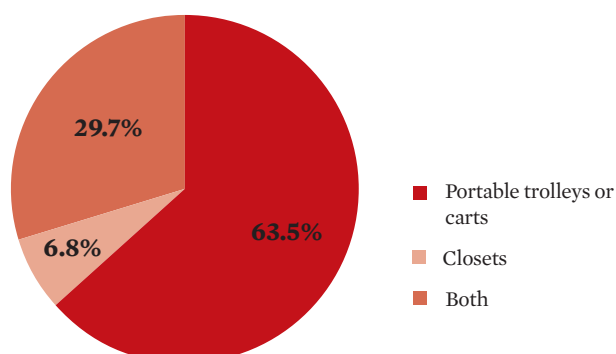
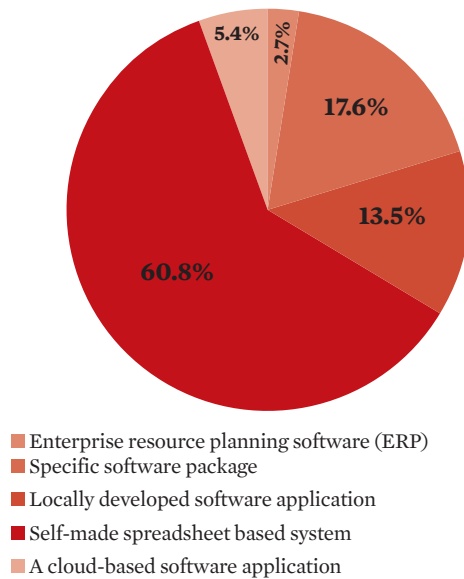
FIG 6: Do you use portable housekeeping trolleys or do you have housekeeping closets on each floor?

FIG 7: What sort of software does your hotel use to manage housekeeping rotas, inventory control etc?



Whatever the system for restocking rooms, someone needs to be in charge of managing inventory, for linen and amenities through to cleaning products and equipment. This duty sits with various people: for the majority of respondents (42%), the housekeeping manager is responsible for inventory controls. For others, it is the housekeeping director (26%) or an assistant manager or supervisor (24%).

Managing inventory is a critical task, but nearly two thirds of housekeepers – 61% – in the UAE are still relying on a “self-made spreadsheet system” in order to do this (see Fig 7). Of the remaining 39% there is a mixture of housekeepers using “locally developed software applications” (13%); “specific software packages” (18%); a “cloud-based software application” (5%); and just 3% using “enterprise resource planning (ERP) software”.

Spreadsheet systems have to be manually updated, meaning room attendants collect their paperwork at the start of their shift. The system works, but is it really the most efficient? What happens when there are last-minute check-ins or check-outs to accommodate? How is the schedule updated?

At the Starwood Al Habtoor City hotels in Dubai, director of housekeeping – complex, Barbara Arensmeyer, has a team of around 250 to coordinate across three brands; the W, Westin and St.Regis. She is hoping to implement the Starwood-approved software supplier, REX Housekeeping Room Expeditor, which streamlines the entire room assignment and cleaning process using Apple iPods, iPads or iPhones.

“This is more efficient,” says Arensmeyer. “It helps you know which room to prepare, you can update maintenance if needed, you can update special requests for the guest.”

Launched back in 2008, as housekeeping’s “new best friend”, REX, and systems like it, have been slow to catch on. It’s a software that essentially tells the room attendant which room to prioritise next, based on data sourced from the PMS and other systems. It also provides the room attendant with guest preferences, which Arensmeyer says will be “very useful”.

Tatjana Ahmed, functional housekeeping specialist and housekeeping manager at Grand Hyatt Dubai, says modern automation means her department is completely paperless. All

room attendants have an automated system on a mobile device which saves time and money.

“If you think, we have 10 team leaders and they all have arrival lists, departure lists, VIP in-house lists; they have 30 pieces of printed paper each and then the evening shift comes, and reports are [re-]created. I would think we save one or two reams of paper a day, and over a year, that is a lot of money. And you save time – everything goes directly to engineering or to the guest runner or to laundry when you dispatch a request for example, to change a light bulb or for laundry pick-up. You eliminate the person in between.”

She adds that by equipping attendants with modern technology, it helps to create a more professional perception of housekeeping.

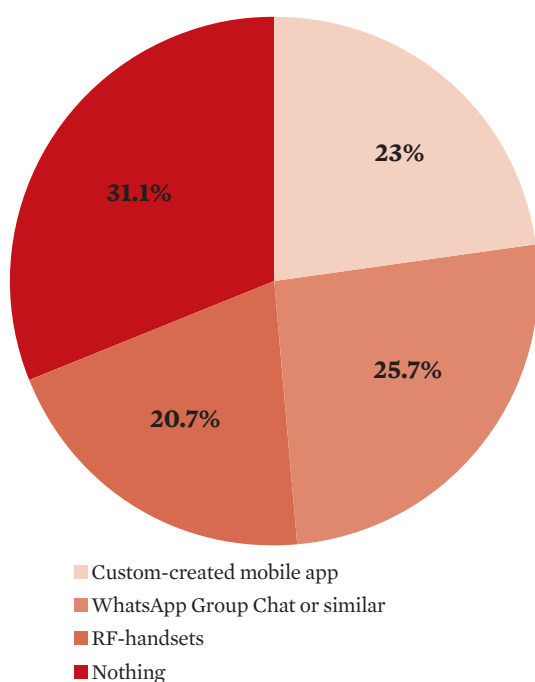
“It’s very important to elevate the position of housekeeping. People around us have to realise how important housekeepers are and not belittle them by calling them ‘just cleaners’,” asserts Ahmed.

Management and support of housekeeping teams, which as reported earlier often comprise around 100 staff, is not done in an efficient way, according to findings from the *Housekeeping Survey*. Nearly one third (31%) of respondents do not use any form of mobile technology to manage, support or monitor their teams. One quarter rely upon a “WhatsApp group chat” or similar; 23% use a “custom created mobile app”; and 20% still use RF-handsets (see Fig 8).

Automated management systems, with a mobile component, can be very expensive and implementation requires significant staff training at the outset. Mercy Fernandez, director of housekeeping at The Ritz-Carlton Dubai International Financial Centre, says that using a tailored spreadsheet system for staff rotas means changes in manning and room movements, impacted by occupancy levels, can be quickly corrected and easily traced. She admits that some housekeepers are just not very technology savvy and are therefore more “comfortable updating weekly rosters manually rather than electronically”.

“IT’S VERY IMPORTANT TO ELEVATE THE POSITION OF HOUSEKEEPING. PEOPLE AROUND US HAVE TO REALISE HOW IMPORTANT HOUSEKEEPERS ARE AND NOT BELITTLE THEM BY CALLING THEM ‘JUST CLEANERS’.”

Tatjana Ahmed, functional housekeeping specialist & housekeeping manager, Grand Hyatt Dubai

FIG 8: What mobile technology do you use to monitor your teams?

However, Pamini Hemaprabha, executive housekeeper, regional rooms specialist and master trainer at Emirates Palace in Abu Dhabi, a Kempinski hotel, says that “these days everything is technology driven and housekeeping cannot stay back”.

“Housekeeping is delayed when it comes to innovation,” adds Hemaprabha. “We should put more time into innovation, into giving something different to the guests.”

Nadine O'Connor, housekeeping manager at Jumeirah Creekside agrees, especially in light of current trading conditions – with reduced rates at UAE hotels a continuing trend for 2016.

Dubai's hospitality market witnessed an 8.2% drop in average daily rate to US\$274 from \$299 in May 2016 over 2015, with RevPAR dropping from \$200 to \$186 over the same period. In Abu Dhabi, hotels witnessed a drop in RevPAR of 8.9% in May 2016, mainly due to a decrease in ADR from \$127 to \$115 year-on-year.

Declining rates put every department under pressure to deliver quality, but maintain or reduce costs. “Housekeeping is one of the biggest spenders, so of course [declining rates impact us] because we still have to maintain our profitability. You have similar occupancy levels so we're not seeing a reduction in manpower; we [have] to find creative ways to provide a luxury service and make sure that our expense levels are controlled,” she says.

For example, Jumeirah Creekside recently changed its amenities line from a branded range to an in-house product linked to its spa line. O'Connor says these are more affordable, fully biodegradable and have the added benefit of driving awareness to the spa.

The housekeeping department is also paperless, using software from Hotsource and Opera Mobile integrated this year.

“The team surprised us in their ability to be able to adapt, once they got around that headspace, of working in a technological environment,” says O'Connor.

“We can see a lot quicker, where [our] colleagues are, which rooms have been cleaned, which rooms have been inspected, which rooms are ready for sale, which rooms need maintenance support, which guests require assistance. So it definitely helps us to exceed expectations of the guests because we have real time information of what's going on,” she says.

6. The outsourcing obstacle

One of the issues raised most frequently in all the housekeeping interviews conducted by *Hotelier Middle East* revolved around the challenges of staffing, from a lack of available talent and tight budgets through to resourcing via outsourcing and third parties.

Without exception, every interviewee said staffing was the biggest issue facing the industry. Tatjana Ahmed says there is a shortage of young talented people entering hospitality overall and of those that do, only the unskilled choose housekeeping as it is a labour-some, entry level position.

“It's not very well paid and it's not very glamorous. It's a big challenge to lure people into our sector,” she admits.

Lakmal Mawella, executive housekeeper at The Address Boulevard Dubai, says recruitment is even harder because room rates at the UAE's hotels mean that salaries are practically the same as those in core target recruitment markets, such as India

“HOUSEKEEPING IS ONE OF THE BIGGEST SPENDERS, SO OF COURSE [DECLINING RATES IMPACT US] BECAUSE WE STILL HAVE TO MAINTAIN OUR PROFITABILITY... YOU HAVE SIMILAR OCCUPANCY LEVELS SO WE'RE NOT SEEING A REDUCTION IN MANPOWER; WE [HAVE] TO FIND CREATIVE WAYS TO PROVIDE A LUXURY SERVICE AND MAKE SURE THAT OUR EXPENSE LEVELS ARE CONTROLLED.”

Nadine O'Connor, housekeeping manager, Jumeirah Creekside

and Sri Lanka, because lower occupancy and less rate means reduced service charge in their pay packets. “We are struggling to get the staff for the salaries that most hotels offer,” he says. “Not many people want to come to Dubai from India because they can get the same salary at home.

“We can get staff, but they stay only a year, year-and-a-half and then they move for AED60 to somewhere else,” says Mawella, citing an age-old Dubai trend.

Hari Sudhakar, executive housekeeper at Le Meridien Al Aqah Beach Resort says retention is particularly challenging in Fujairah, where his hotel is based.

“The turnover is high. Then you have a challenge to find team members and it takes at least three to six months to get them on track. There’s a lot of training and empowerment to keep them engaged in laundry and housekeeping,” he says.

One solution to the recruitment dilemma is to use outsourced staff, though this is rarely possible in more remote areas like Fujairah. It also brings with it its own set of challenges, with housekeepers complaining that agency employees lack the skills required for the roles.

Barbara Arensmeyer, who uses around 100 outsourced staff for night cleaning and public areas, says: “There are challenges with a lot of cleaning companies that are delivering services to hotels. This is one of the key issues. They provide you with a labour force that is not trained at the end of the day and we have to train them.”

Training of agency staff can be difficult because there is often a language barrier, adds Sharon Buenaventura.

“From experience, operators promise that outsourced staff will have basic English [language skills], but most often this is not true. Out of 10 staff, an average of three staff would be able to communicate in English,” says Buenaventura.

In the survey, nearly two thirds of respondents reported that their public areas housekeeping team was outsourced (see Fig 9). Eleven percent said laundry was outsourced. A further 13% said outsourcing was only used during critical peak periods. Only 8% of respondents said they never outsourced housekeeping or laundry services.

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Lakmal Mawella, executive housekeeper,
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“FROM EXPERIENCE, OPERATORS PROMISE THAT OUTSOURCED STAFF WILL HAVE BASIC ENGLISH [LANGUAGE SKILLS] BUT MOST OFTEN THIS IS NOT TRUE. OUT OF 10 STAFF, AN AVERAGE OF THREE STAFF WOULD BE ABLE TO COMMUNICATE IN ENGLISH.”

Sharon Buenaventura, director of rooms, Taj Dubai

This equates to a weighted average of 22% of a hotel’s total housekeeping and laundry workforce being outsourced. The modal average was 0-10%, with one fifth of respondents acknowledging that up to the 10th percentile of the team were sourced from a third party.

Master trainer Pamini Hemaprabha, says the industry must “fight” to get this balance right.

“Not all of your housekeeping staff can be insourced, but if you want to take casual staff you need to have a fine balance,” says Hemaprabha. “Maybe 70% can be in-house and 30% can be outsourced, but it certainly cannot be the other way around. Casual labour should not be used in rooms and should be kept for public areas. Having said that, some areas should be in-house, such as the lobby.”

FIG 9: Have you had to outsource any of your housekeeping team?

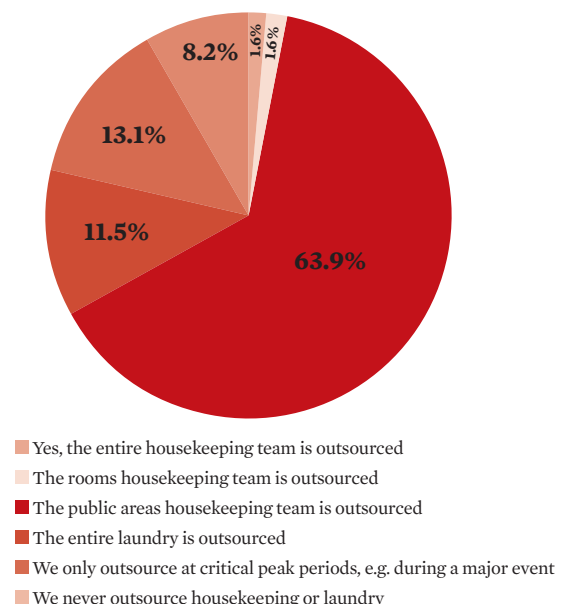
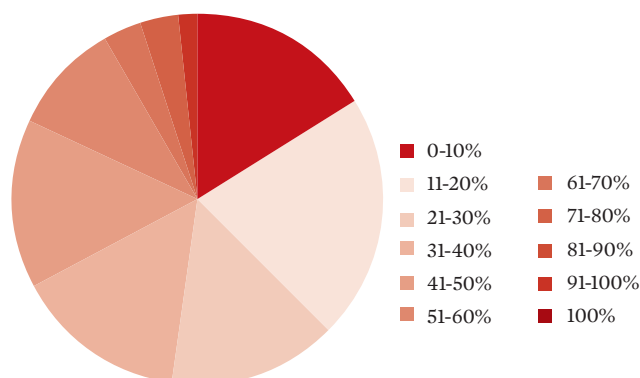


FIG 10: What percentage of the total housekeeping and laundry workforce in your hotel is outsourced?



There is general agreement that budget constraints mean that using outsourced staff is necessary, but there are misgivings around the quality of agency staff available in the UAE.

Arensmeyer warns it can be a false economy: “Everyone is budget concerned, everybody is trying to manage their resources; especially in housekeeping [where] it’s so manpower related [that we have to outsource],” says Arensmeyer.

“Everyone is looking at costs, but costs and quality at the end of the day do not match.”

Housekeeping Survey respondents rated the quality of outsourced staff. No-one said they were “excellent”, though 10% reported “very good” and 16% said “quite good”. However, nearly half (49%) of the respondents submitted that agency staff were “average”. Fifteen per cent said they were “quite poor”, 7% said “very poor” and 3% went as far as to say “terrible”.

This means three quarters of housekeepers view the performance of outsourced staff at either average or below average. A worrying statistic for the region’s intensely competitive hotel market.

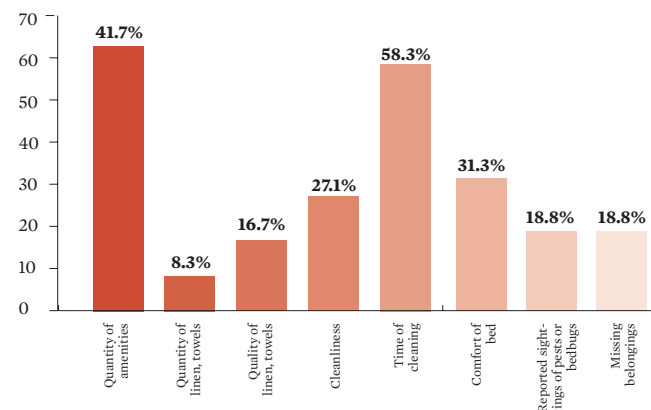
Mercy Fernandez, says it’s important to remember that agency staff may struggle for several reasons: language, because they don’t understand what’s needed; laziness, because they are assigned to a role they are not passionate about; and confusion, caused by moving to a new country and being overwhelmed by the differences.

“If you have a company that provides you with this type of worker, then it’s a real problem,” says Fernandez.

Hemaprabha says the challenge is that, as the hotel is not responsible for “their salary, their transportation, their accommodation, their medical, or their food, how do you get the best out of them? How do you make sure they live in the best conditions so they are motivated? How do you expect them to be committed to you?”

According to Fernandez, the solution is to make sure outsourced staff feel like they belong to the team, by partnering them with a trainer they will be comfortable with. Some agencies will offer a two- to three-week training period, without expectation of salary, and “during this time you will know if they can be part of your team”. “I put them on my daily line-up with the team and if they can work on their own I will pair them for another week with someone who speaks English, so there will be a little basic communication between them and slowly, they will feel comfortable with the English language. Most of the time I win, and I can count on them to be part of my team,” asserts Fernandez.

FIG 11: What are housekeeping related guest complaints normally about?



Another issue linked with that of staffing is guest complaints. Housekeeping may be a back of house department, but room attendants, public area attendants and cleaners often come face-to-face with guests – sometimes, in their most personal space. They should be trained in guest relations and in particular, handling guest complaints.

According to the *Housekeeping Survey*, 65% of housekeeping attendants are “fully trained” in customer service and complaint resolution. Thirty-three percent “have had basic training” and 3% have had “no training, because it’s a back of house role”.

The most common subjects that guests complain about are the “time of cleaning”, with 58% of respondents citing this as one of their three most common guest complaints; the quantity of amenities; and the comfort of the bed (see Fig 11).

7. Looking after the environment

An ongoing challenge for housekeeping professionals – and hotels as a whole – is achieving balance between offering exceptional guest service, especially in luxury hotels, and being environmentally friendly. By its very nature, housekeeping is not an industry that favours the environment – it relies on cleaning chemicals and consumes large amounts of water and power. But, there is a trend emerging for housekeepers to be more environmentally-conscious. They are helped in this regard by suppliers keeping up to date with modern water-saving technology.

One of the clearest ways to track progress is to explore how far hotels are following the various environmental certifications that now exist.

The majority of housekeepers, 60%, said that “all of their cleaning products” were certified as being environmentally-friendly. Just over a third said that “some of their cleaning products were eco-certified” and only 5% said they had no environmentally-certified cleaning products.

Fifty-eight percent of respondents reported that their hotel had an eco-certification, such as LEED, Green Globe or Green Key. Of the 42% to answer this question negatively, nearly half of them (48%), said their hotel was either undergoing certification or looking to begin the process to achieve a recognised eco-standard.

58% of respondents claim their hotel has an eco-certification, such as LEED, Green Globe or Green Key
Of those hotels that do not, 48% are currently undergoing certification process or looking to begin the process

Of all those involved in some way with the certification process, 77% believed it would have a “significant positive impact” on what they could achieve with regards to sustainability, but 23% said they were “not sure” of the impact.

Likewise, more than half of those working at hotels without an eco-certification said that this had “a detrimental impact” on what they could achieve concerning sustainability.

In what was probably the most clear-cut of all the *Housekeeping Survey* results, however, 91% of respondents said they think their hotel can reduce its utilities cost. This suggests that not nearly enough is being done to tackle power and water consumption. Seventy-seven percent of respondents said they personally tracked utilities costs, leaving nearly a quarter that don’t even look at the bills. Perhaps if engagement in utilities use was higher, not just at the most senior level, but throughout the teams, more would be done to tackle this.

While this responsibility usually sits with engineering department, housekeeping has an obligation to make an active interest, says O’Connor.

“Purchasing products that we know are going to help the environment is absolutely key. It’s also [about] educating our colleagues. Some colleagues come from environments where sustainability won’t be at the forefront of their mind-set,” she says.

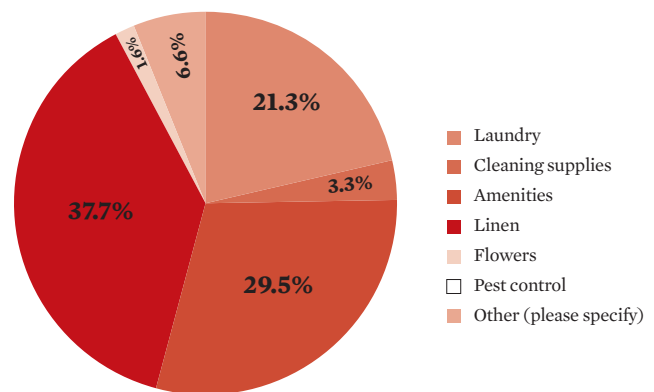
“We have to look at what products are coming in, look at wastage in terms of providing the right amount for our guests, look at utility consumption, water consumption. Sometimes changes can be made without impact to the guest experience. They might not realise there has been a reduction in water pressure or in our flow rate because of the equipment and technology we can now use,” says O’Connor.

However, it’s not just hotel operators that are failing to appreciate the environmental impact of their business. Hotel guests also have a responsibility towards the environment as well. Four fifths of respondents said they have a system in place

“PURCHASING PRODUCTS THAT WE KNOW ARE GOING TO HELP THE ENVIRONMENT IS KEY. IT’S ALSO [ABOUT] EDUCATING OUR COLLEAGUES. SOME COLLEAGUES COME FROM ENVIRONMENTS WHERE SUSTAINABILITY WON’T BE AT THE FOREFRONT OF THEIR MIND-SET.”

Nadine O’Connor

FIG 12: What is the biggest housekeeping cost?



to encourage guests to re-use their towels and linen. However, the majority of respondents (32%) said that only 10% of guests follow their recommendations – and this was supported by testimonials from our interviewees.

Twenty-six percent said that 20% of guests acted on environmental advice, and 11% said 30% of guests followed suit. At the other end of the spectrum, only 3% of respondents said that 90% of guests adhered to eco practices.

Starwood Hotels and Resorts runs the guest-facing ‘Make A Green Choice’ programme, implemented at the W and Westin in Al Habtoor City, which entitles guests that opt to forego full housekeeping for up to three days in a row 250-500 Starpoints or a \$5/5€ Food & Beverage voucher. At the same time, they save up to 49.2 gallons of water, 0.19 kWh of electricity, 25,000 BTU of natural gas, and 7oz. of cleaning product chemicals per night, depending on brand and region. However, according to Arensmeyer, even incentives like this aren’t enough to convince the majority of guests to participate.

“Honestly speaking, most of our customers are not choosing this kind of programme,” she says, adding that in luxury brands like St. Regis, guests will expect housekeeping up to three times in one day.

It’s a slightly more positive story at sister hotel Le Meridien Al Aqah Beach Resort. Here, executive housekeeper Hari Sudhakar says that about 20-25% of guests opt in to ‘Make A Green Choice’. There is also another programme, Green Room, in which guests request to have linen changed on alternate days instead of every day. Sudhakar says about 30-35% of guests participate in this, with SPG members most likely to take part.

8. Laundry as a revenue source

The biggest cost for Housekeeping Departments is linen, with 38% of respondents citing this as their main expense. It was closely followed by Amenities (30%) and Laundry (21%) (see Fig 12). Wouldn’t it be great if these cost lines could also be used in some way to generate revenue?

This is the case at Emirates Palace in Abu Dhabi, which makes “huge revenue” servicing laundry for other hotels of 100-150 rooms, according to Pamini Hemaprabha.

Forty percent of respondents have an in-house laundry compared to 54% that outsource to a third party laundry company (see Fig 13). The remainder either take laundry off premises, but manage the work themselves, or outsource to another hotel.

So great is the cost of laundry that many new build hotels do

“[FOR] A LAUNDRY YOU NEED TO HAVE SPACE, ALMOST A WHOLE FLOOR, AND STAFFING TO RUN AND MAINTAIN THE MACHINES, WITH SPECIFIC KNOWLEDGE. BUT IF YOU LOOK AT THE BIGGER PICTURE, WE ARE LOSING MUCH MORE MONEY AT THE END OF THE YEAR... BY WASTING OUR TIME AND PRODUCTIVITY, BY MANAGING THE OUTSOURCE PROCESS, THE COMMUNICATION [AND] DEALING WITH COMPLAINTS.”

Lakmal Mawella

not even allocate space to this, preferring instead to outsource. Normally a small laundry will be built to cater for guests, but commercial laundry of linen and towels will be taken off-site.

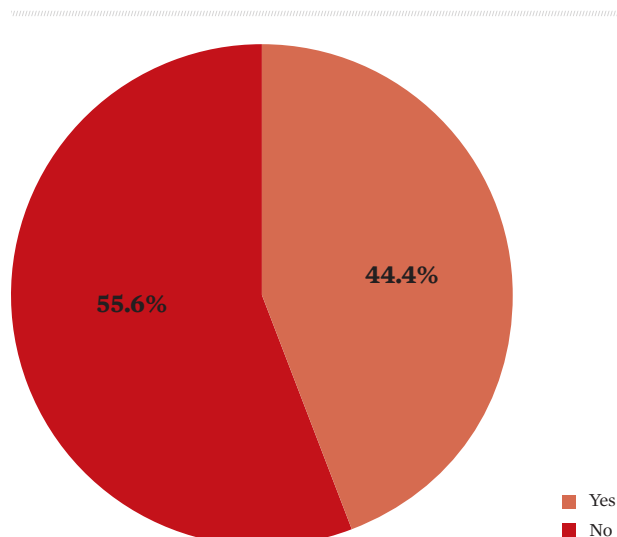
However, according to the housekeepers we spoke with, this isn't necessarily the most financially rewarding strategy in the long-term. They lamented the time taken to manage outsourced companies and the high risk of missing laundry as major issues.

“Housekeepers prefer to have laundry in-house even if it is a high investment,” admits Lakmal Mawella.

“[For] a laundry you need to have space, almost a whole floor, and staffing to run and maintain the machines, with specific knowledge. But if you look at the bigger picture, we are losing much more money at the end of the year... by wasting our time and productivity, by managing the outsource process, the communication [and] dealing with complaints.”

Of those that do have an in-house laundry, nearly half (44%) use the facility to generate extra revenue by either doing laundry for other businesses or hotels. (See Fig 14.) The majority (83%) generate up to US\$250,000 extra annual revenue this way. A handful generated \$250,000-500,000 or \$500,000-750,000 and one respondent said their laundry brought in more than \$1mn revenue per year.

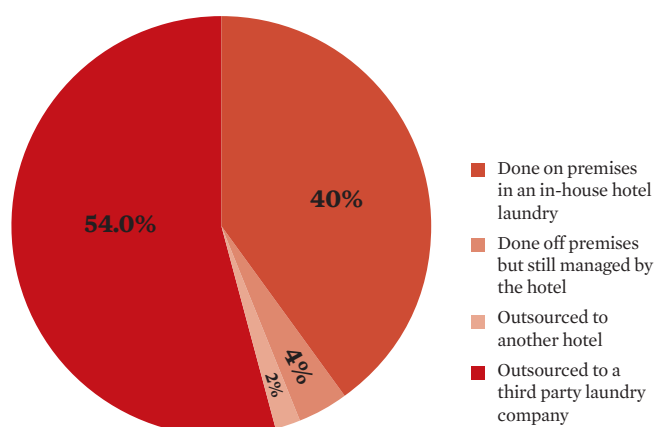
FIG 14: If you operate an in-house laundry, do you use it to generate extra revenue?



83% of hotels with in-house laundry generate up to US\$250,000 per year

A handful generate between US\$250,000 and \$500,000 per year

FIG 13: Where do you conduct your hotel's laundry?

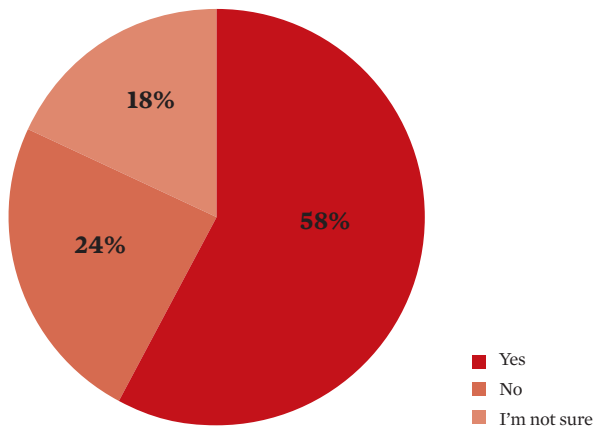


Regardless of whether laundry is performed in-house or off-site, private guest laundry generates on average (modal) of up to \$100,000 annually for housekeeping departments, with 64% of respondents reporting this. In some instances, guest laundry generated \$500,000 every year, while one hotel reported annual income of more than \$1mn per year.

On average, a hotel processes six tonnes of laundry every day, according to the *Hotelier Middle East Housekeeping Survey*. This is no mean feat, yet a lack of investment in modern, environmentally-friendly equipment is an issue raised by many of the housekeepers interviewed.

As Fig 15 illustrates, 58% of respondents believed that investment in equipment could save both energy and money. Alarming, many did not know exactly what the technical specs of their current equipment were.

FIG 15: Should your hotel invest in new laundry equipment to save energy, and ultimately cost?



For several years now, G Force washers, which cut down dramatically on the amount of water used, and dryers with moisture sensors, that cease drying automatically when the items are dry, have been recommended.

However, only 30% of respondents said they used G Force washers and 36% said they didn't know what type of washing machines they had. Half of the respondents reported owning moisture sensor dryers, but another 22% didn't know if their laundries' were equipped with such dryers.

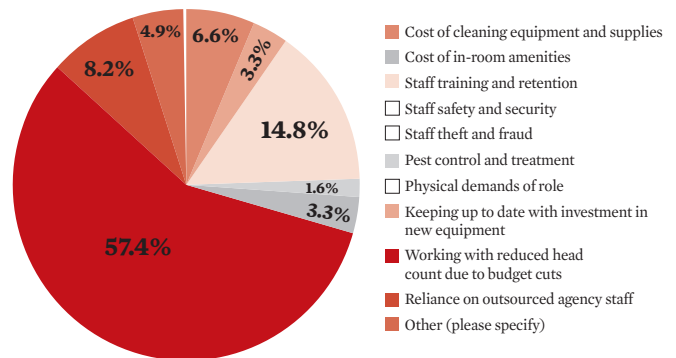
9. Sentiment: challenges and opportunities

The results of the *Hotelier Middle East Housekeeping Survey* reveal a somewhat disparate community, with a few dominant trends and great differences in how professionals approach operations, technology and management. Shared challenges seem to be related mainly to staffing and budgets. But what do housekeepers really feel about the potential risks to their businesses, and their career?

When asked 'what is the biggest threat to the hotel housekeeping profession', the top three reasons all revolved around human capital. Thirty-four percent of respondents cited "the lack of talent entering the housekeeping profession"; 30% said "the levels of remuneration forcing talent to leave the industry"; and 16% believed it to be "a lack of professional training, qualifications or recognition".

Asked to identify "the biggest challenge in housekeeping operations" (see Fig 16), the sentiment was more pronounced – 57% of respondents cited "working with reduced head count due to budget cuts". Following this were "staff training and retention" (15%) and "reliance on outsourced agency staff" (8%), the reasons behind which we've already outlined.

FIG 16: What is the biggest challenge in housekeeping operations?



On a more reassuring note, the physical nature of housekeeping – and its potential cause of repetitive motion injury (RMI) – was of much less concern to respondents. Only 8% selected this as the "biggest threat" to the profession.

Nadine O'Connor comments: "There's a huge complexity in terms of health and safety requirements to make sure everybody is protected. For example, that you are pushing a trolley not pulling a trolley, that you are bending at the knees not bending at the back. Training is really important."

Fortunately, 93% of respondents have never been signed off work with RMI, and 80% reported that the same was true for their teams. Only 20% said a colleague had been signed off work with a RMI. This could be down more to luck, or the hardiness of housekeepers, than anything else though; 43% of respondents were not aware of any measures in place to try to prevent RMI among housekeepers.

A typically sensitive issue in Middle East hotels is tipping – especially when it comes to back of house roles. The mandatory 10% service charge added on to all room rates in the UAE can have a similar effect to the 10% service charge added onto restaurant bills – customers are less likely to add any extra, cash tips for their housekeeper, or server.

In the US, Marriott hotels decided to actively encourage tipping and introduced the 'Envelope Please' policy – to mixed feedback. At the launch of the programme in 2014, the company stated: "Hotel room attendants often go unnoticed, as they silently care for the millions of travellers who are on the road at any given time. Because hotel guests do not always see or interact with room attendants, their hard work is many times overlooked when it comes to tipping. The Envelope Please makes leaving them a gratuity simple and secure."

It's a reasonable statement, but even in the tipping culture of the US, some reviews compared it to "blackmail".

In the UAE, the overall sentiment seems to be against encouraging tips (see Fig 17). Sixteen percent of respondents

"IT IS A NICE GESTURE FOR THE ATTENDANT TO RECEIVE A TIP IF THE GUEST WAS HAPPY WITH THE SERVICE - BUT IT SHOULD NEVER BE ASKED FOR."

Franziska Purkert, corporate director, housekeeping – operations, Rotana Hotel Management Corporation

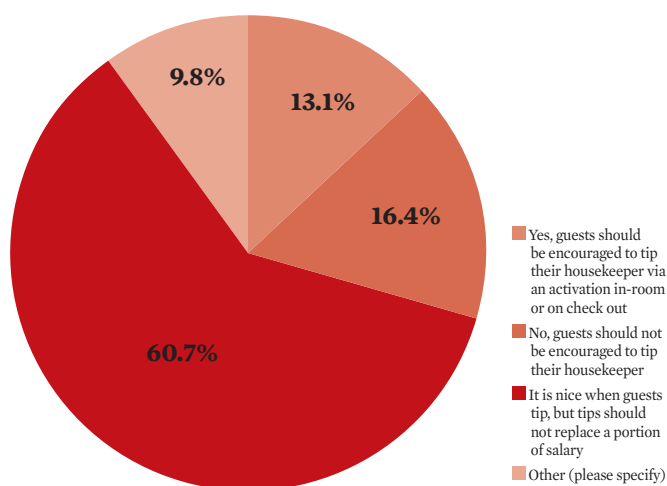
said guests definitely should not be encouraged to tip. Nearly two thirds (61%) believe that while “it is nice when guests tip, tips should not replace a portion of salary”. Only 13% think tipping should be actively encouraged.

As Franziska Purkert says: “It is a nice gesture for the attendant to receive a tip if the guest was happy with the service – but it should never be asked for.”

Mercy Fernandez adds: “I will go with the 61%. I dislike staff who will work only because they receive something from that room or guests and forget the others.

“One thing I believe will be a good gesture is to have a system like that on cruise ships, where every room has an amount the guest pays for housekeeping services... That will be a good thought, as you know that aside from your monthly salary – which is not very high – there will be another income that will be added to what you did for the day,” suggests Fernandez.

FIG 17: What are your views on whether hotel housekeepers should receive tips?



10. Career Paths

Looking to the future, and generally speaking, issues of staffing aside, housekeeping managers and directors are a secure, positive group of hoteliers. Two thirds of respondents said they were either “completely satisfied” (39%) or “very satisfied” (27%) in their roles. (See Fig 18.)

FIG 18: How satisfied are you in your current role?

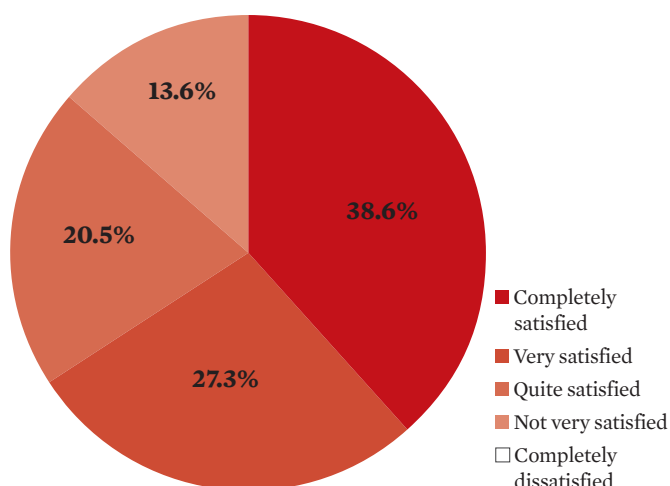
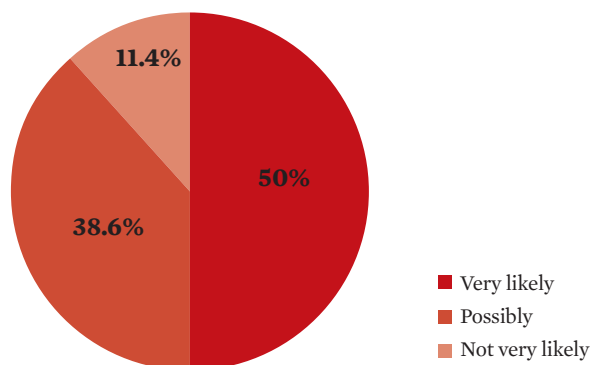


FIG 19: Do you think it is likely in the Middle East hotel industry for housekeeping to be a launchpad into management?



Most respondents (43%) said they were not likely to look for a new job in 2016 and only a quarter (27%) said that it was “very likely” that they would be on the move.

Promotion prospects were fairly low, however, most likely due to the seniority of the survey respondents. Forty-five percent said promotion in 2016 was “not very likely”, compared to 39% who said it was a possibility and 16% who expected it to be “very likely”.

Overall, most respondents were confident in their career paths as housekeepers. Half of them said that housekeeping could “very likely” be a career path into hotel management and another 39% said this was a possibility. Only 11% believed this progression to be unlikely.

Any reservations about the potential career path hark back to housekeeping’s traditional “image problem”, says Ahmed.

“Young people still have this perception of housekeeping; that it’s only making beds, and cleaning. People have to change their perception; we are not only cleaning for appearance anymore – we are cleaning for health. I’ve just completed the training of my entire department on infection control and infection prevention. It’s such a pressing subject that we have to make sure our staff understand... how important it is to prevent cross contamination,” she says.

“This is a very big subject and we have to make sure that our staff understand and elevate their position also. We are not only making beds. [Health] really depends on the housekeeping operation and how we clean and how safe our staff and our guests feel in the hotel. That’s one of the big changes in the industry,” she asserts.

Nadine O’Connor agrees that it’s a “perception issue”, but urges housekeepers to accept that if the department is used as a “stepping stone” into other areas, that can have benefits too.

“When I look around our hotel I see some of the colleagues that started in housekeeping in other departments that are completely unrelated and it’s fantastic. It also drives a complete understanding across the team because when they see a housekeeper, they know what they’re doing and what they’re having to go through,” reports O’Connor.

“I’ve always been open to the fact people need to grow and find their own paths. A lot of people coming into industry are really young, they’ve just come out of further education or finished high school and they really don’t know what their path is going to be. [Housekeeping can be] an opportunity to come in, work hard and grow, while you’re finding out what you might want to do in the future.”

11. Conclusions

As with all expense departments, the pressure is on housekeeping to deliver a quality service while keeping costs down in 2016. For some, this will mean investment in technology to automate operations, however for many properties, looking to keep capital expenditure to a minimum in a tough market, such projects are likely to be delayed.

However, reports from housekeepers that have made the move from manual systems to specific industry software are testament to the value of deploying technology to reduce costs, improve efficiency and increase inventory control.

There are other efficiencies to be made if hotel management companies can stomach to make capital investments in challenging market conditions to introduce engineering systems and equipment that will reduce operational utility bills.

Only so much can be automated though, and housekeeping will remain a labour-intensive department. And it is increasingly the human capital side of the industry that is proving most challenging, with every aspect of staffing posing difficulties, from finding staff to retaining them, from remuneration to career development.

Outsourcing remains a problematic solution to some of these issues. It's clear that most housekeeping professionals are far from convinced that the current crop of outsource service providers are capable of providing sufficiently skilled staff, nor do they demonstrate a clear understanding of the business requirements.

Regardless of a general ambivalence among housekeepers towards outsourcing, pressure to reduce operational costs make it an inevitable reality for most hotels, if indeed, it isn't already. Greater familiarity with outsourcing practices will in turn lead to a gradual business culture change within hospitality and a growing number of quality service providers.

To accelerate that process operators and suppliers need to work together to develop a framework that delivers for everyone – the individual, the hotel and the guest.

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