A balancing Act - Developing a Digital Leadership Strategy Between Digital and Analogue Worlds in the Tourism and Hotel Industry.

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Abstract

Achieving a position of Digital Leadership requires a strong strategic response and cultural posture. Although digitalisation and artificial intelligence is increasingly seen as an opportunity rather than a threat by the vast majority of players in tourism and hospitality industry, the digitalisation activities currently being observed by numerous players are more of a reactive, operational and/or isolated nature than part of a dedicated and integrated digitalisation strategy, with clearly defined goals and the aim of transforming a traditional tourism offering into a digitalisation-capable and therefore sustainable business model. This paper aims to clarify how tourism and hospitality organisations strategically respond to the challenges imposed by digitalisation and artificial intelligence and to identify some tensions and challenges in the related strategic approach.

Key Words:

Digital Leadership, Strategy, Analogization, Digitalisation, Transformation

Introduction

Digitalisation and artificial intelligence are reshaping the tourism and hospitality industry and increasingly becoming the focus of tourism theory and practice (Gretzel et al. 2022; Egger 2022; Buhalis et al. 2019). However, the majority of the tourism and hospitality industry companies

have been attested a below-average level of digitalisation or digital maturity by various studies over a long period of time (Deutsche Telekom 2022; Demary and Goecke 2021; Ghandi et al. 2016, Strategy &PwC 2013). Many industry players seem to be in an early or experimental stage of the digital era where there appear to be many possibilities, but very few truths and regularities. Consequently, the fundamental questions and issues that both science and business practice deal with in the context of digital transformation are the same today as they were in the past. An example of this is the observation that, around thirty years after the commercial beginnings of the internet in 1991, basic digital hygiene factors, such as online bookability and online visibility of companies, are still identified as crucial problem areas of digitalisation in the tourism and hospitality industry (Online Birds 2023; BTE Tourismus- und Regionalberatung 2023). This and the fact that very few companies are "born digitals" has shifted the balance of power over the last twenty years, as numerous changes in the industry structure and competitive landscape in various areas of tourism and hospitality seem to underline (lower market entry barriers, increasing competitive rivalry, structural change, risk of substitution, dis/re-intermediation, consumer power, market transparency, etc.) (Pencarelli 2020, Buhalis et al. 2019). The strong dynamics of change are reflected in the emergence and development of numerous companies that were not previously active in tourism and hospitality industry and have now - based on their purely digital business approach - leapfrogged the analogue age of tourism and are challenging established providers at various levels of competition and performance, as for instance Booking, Google or Airbnb in the hotel industry. Currently, very few of the traditional providers of the tourism and hospitality industry have been able to strategically counter the disruptive and digitalised business models; in fact, most companies still lack a future-oriented and systematic leadership approach to digitalisation that can be used to respond to the changing challenges on the market and organisational side (Bauhuber et al. 2023, Ristova/Maglovski 2018).

Digital Leadership – What is your Strategy?

Digital Leadership generally refers to the management of organizational systems and stakeholders based on the comprehensive application of digital technologies, aiming to achieve higher effectiveness and efficiency in the internal and external activities of the company (Wirtz 2021). In literature, the concept of 'digital maturity' has emerged as a means to assess

the current status of a company's digitalisation efforts and to provide guidance for future strategies and decisions. Following Chanias and Hess, digital maturity is defined as *'...the status of a company's digital transformation' that describes '...what a company has already achieved with regard to transformation efforts'* (Chanias/Hess 2016, p. 4). Various maturity models have been developed in both academia and industry (Proff et al. 2021; Thordsen et al. 2020; Remane et al. 2017), which, with moderate variations and depending on the level of abstraction, primarily focus on four dimensions: Strategy, leadership and corporate culture, competencies and skills and organization.

In the past, tourism and hospitality companies have done a lot to become more efficient in what they do, they have become bigger, faster, more productive, better, in other words, they have become more efficient in what they do. As we all know, efficiency means doing things "right". This is the one art that companies and entrepreneurs must master. However, in his Harvard classic "What is Strategy?", Michael Porter (1996) pointed out almost 25 years ago that operational excellence is by no means a strategy and cannot replace it ("operational effectiveness is not strategy"). However, in the digital transformation process in many tourism and hospitality companies, the technology perspective currently dominates the customer perspective and thus tactics dominate strategy, rather than the other way round (Gardini 2021; Furr/Shipilov 2021), despite the well known dictum of digital transformation management that *"strategy, not technology, drives digital transformation."* (Kane et al. 2015). That this is obviously not a recipe for success and that the majority of all digital transformation initiatives do not accomplish their desired objectives has been repeatedly emphasised by various studies across a wide range of industries for many years (Davenport and Westerman 2018; Martin 2018; Piccoli 2008). In 2019, for example, US companies invested an estimated USD 1.3 trillion in digital transformation initiatives, of which an estimated USD 900 billion was wasted due to a lack of anticipation and an over-reliance on technology (Tabrizi et al. 2019).

It appears that the technological and operational agenda continues to overshadow the much more important strategic question of what long-term added value digitalisation can create for companies and customers and where, and whether the potential for digital change is so massive and fundamental that it fundamentally challenges the way companies function in their respective economic structures. In this context, Porter was fast to point out that the view of digital technology and the economic evaluation

of the strategic relevance of internet-based technologies should be characterised by a clear analysis of the strategic added value that digital opportunities are able to deliver to companies and organisations: *"...see the Internet for what it is: an enabling technology - a powerful set of tools that can be used wisely or unwisely, in almost any industry and as part of almost any strategy. We need to ask fundamental questions: Who will capture the economic benefits the Internet creates? Will all the value end up going to customers, or will companies be able to reap a share of it? What will be the Internet's impact on industry structure? Will it expand or shrink the pool of profits? And what will be its impact on strategy? Will the Internet bolster or erode the ability of companies to gain sustainable advantage over competitors?"* (Porter 2001, p.64). Even though the COVID-19 pandemic has recently led to a change in awareness and a digitalisation push in the tourism and hospitality industry, the strategic and cultural dimension of digital transformation is still underestimated by large parts of the industry: *"The survival of traditional enterprises is seriously threatened by the new playbook rules established by digitalisation. Consequently, these business entities are called to innovate and re-think the business model they have been using thus far to create value for tourists and to achieve satisfactory performance levels."* (Pencarelli 2020, p.467).

And so the other art that distinguishes good from less good companies is effectiveness, i.e. the ability of companies and entrepreneurs to do the "right thing"! But what is the right thing to do for your own company naturally always depends on the context and the goals you set yourself and is therefore inevitably the most essential and fundamental question that an entrepreneur or a company must answer for itself. Consequently, a strategic answer is also needed in the digital age, but tourism and hospitality companies often find it difficult to develop a clear and stringent understanding of what they do and what they do not want to do. Accordingly, an overemphasis on, as well as a lack of integration of, operational-tactical elements of corporate management can currently be observed in numerous companies across many tourism sectors and industries, while the strategic and coordinative requirements of management are often neglected:*"...these firms appear to be too busy 'running the business' to strategically manage it."* (Rodwell/Shadur 2007, p. 53). The traditionally strong product and sales orientation of many players in the tourism and hospitality industry makes this approach even more difficult in many companies (Gardini 2017).

Successful companies have mastered both disciplines, as both the efficiency and effectiveness of a company are essential in order to achieve superior corporate and marketing performance. The conflict between operational and strategic orientation and the tension between the need to coordinate and integrate analogue and digital corporate activities affects the various areas of a company. Accordingly, a return to a clear market- and customer-centered focus is required here (mission/purpose), as well as the consistent and stringent alignment of corporate activities on the basis of company-specific and long-term developed resources. These capabilities and resources ideally cannot be imitated by competitors (non-imitability), are integrated into the company in such a way that they only realise their full value there (company specificity), cannot be replaced by a competitor's resource substitutes that have a similar performance potential (non-substitutability), have a value-creating character on the market, which is reflected by an additional benefit perceived by the customer (ability to create value on the market) (Frehse 2006; Porter 1999).

The changed competitive conditions in numerous market and customer segments in the tourism and hospitality industry as a result of digitalisation open up new strategic options for service providers in dealing with their customers on their way to becoming a smart or digital tourism and hospitality company in the field of tension between the interaction between artificial and natural intelligence (Haux et al. 2021) as well as the analogisation and digitalisation of entrepreneurial actions (Bichler et al. 2019) and the associated strategic behaviours of standardisation and/or individualisation, mechanisation and/or humanisation and externalisation and/or internalisation (Gardini 2022). For example, the dimensions of analogisation and digitalisation can be used to create a portfolio that can be used to identify four general directions that can serve as a guide through the 'tech' and 'touch' dimensions of tourism and hospitality in the digital age (Fig. 2.1):

- *Integrative strategy (high-touch and high-tech)*

The technological possibilities offered by digitalisation and AI are used to provide customers with highly individualised, intensive and unique customer experiences, with the aim of creating an "*intelligent*" environment that enables a targeted, interpersonal and relationship-oriented customer experience between the customer and the company by making maximum use of the given technological potential.

- *Human-centered strategy (high-touch)*

As a result of increasing digitalisation and mechanisation, a counter-trend of analogisation is emerging ("...need/desire to escape from technology" (Gretzel et al. 2015, p. 185)). Accordingly, the high-touch approach places people and not technology at the centre. The aim is to create a "*social*" environment that enables an intensive, interpersonal and high-quality relationship between customer and company by providing authentic real life experiences, social contacts, collaboration, time sovereignty, deceleration, a change from everyday digital life and much more.

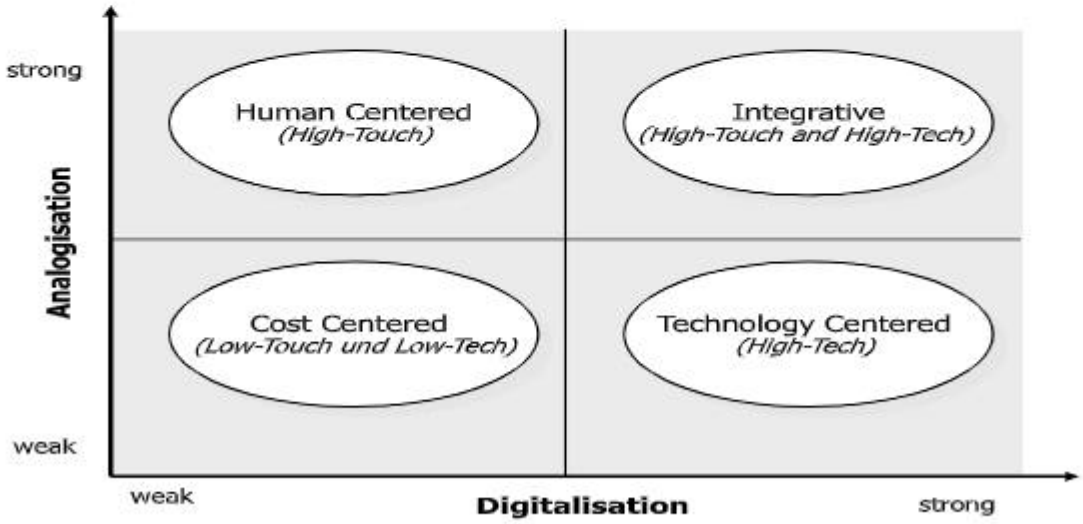
- *Technology-centered strategy (high-tech)*

Digitalisation, mechanisation and automation are the drivers of the business model here. Accordingly, the high-tech approach places technology, rather than people, at the centre. The aim is to create a "*technical*" environment by maximising technological potential and the unique functionality of digital applications, which enables individual, technologically charged customer experiences.

- *Cost-centered strategy (low-tech and low-touch)*

The focus of this approach is not on maximising technological potential, but on optimising it. The aim is to create a "*rational*" environment and, through standardisation, rationalisation, automation, externalisation and more, to drive the substitution of the production factor "human" forward and thus generate costs, price advantages and efficiency gains from both a company and customer perspective.

FIGURE 1: Analogisation and digitalisation als competitive dimensions in the tourism industry (Gardini, 2022, p.453)



The balancing act between old and new as a strategic challenge

At this point, each tourism and hospitality company needs to initiate and develop its own specific digital transformation process based on the company's history, identity and prevailing strategic ideas. The key question that tourism and hospitality companies and organisations need to address at this point is whether this process should be evolutionary or disruptive and revolutionary. This question is not fundamentally new or solely due to digitalisation, as the balancing act between old and new business areas, between existing and innovative business, between efficiency and effectiveness is a well-known challenge in strategic management. In this context, the concept of organisational ambidexterity (Raisch et al. 2009; O'Reilly 2004) is often used in the literature to illustrate the challenges of digital transformation processes in companies. Organisational ambidexterity refers to the specific strategic ability of a company to manage its business model efficiently and in a future-oriented manner at the same time. Hence, from a strategic perspective, companies and organisations must be able to expand their core business with maximum efficiency (exploitation) and at the same time have the ability to actively develop innovations and new business models (exploration) in order to remain competitive in a disruptive, digital world (Kollmann 2020, Raisch et al. 2009). In the strategic development process, however, it is important to note that the digitalisation and digital transformation of a tourism and

hospitality company does not necessarily have to be disruptive and radical. It is important to bear in mind that sustainable business models and concepts can often be realised through intelligent adaptation rather than radical reinvention. Digitalisation in tourism and hospitality is not always about reflexively replacing material or physical elements of service design with digital ones, but rather about striking the right balance. Furthermore, the digital transformation of companies is not always necessarily about a radical change in strategy, but rather about the question of whether and how new digital technologies can be used to transform familiar rather than new customer needs and wishes into satisfying or inspiring customer experiences and customer experiences. (Furr/Shipilov 2021)

The starting point for such strategic development processes is challenging, if not problematic, for many tourism and hospitality companies. Large segments of the tourism sector, such as hospitality, gastronomy, and leisure/cultural businesses, are traditionally considered industries with a weak technological (digital) affinity. This is attributed to the low digital maturity and productivity levels of many stakeholders in these sectors, stemming from a critical and destructive attitude toward new information and communication technologies (O´Connor 2021; Sigala 2014). This mindset derives from a mental model that views digitalisation and hospitality as opposing constructs. In this perspective, digitalisation is not only seen as contradicting the self-image of hoteliers or restaurateurs as hosts but also as a threat to the identity of an industry that primarily defines itself as a "people business". The traditionally lived industry or company identity, coupled with other identity-forming structural components in tourism and hospitality, such as small and medium-sized structures and the dominance of owner- or family-run businesses, is being questioned by digitalisation. This has led to an identity crisis among many industry players, fearing a corresponding loss of identity internally and externally in their businesses (Gardini 2022).

Another issue to be considered is, that despite a growing openness and willingness to change towards new digital technologies and methods in tourism and hospitality, particularly in the development of digital-based business models and digital distribution, many businesses currently feel inadequately prepared for the digital future (Thomas 2024; Carlisle et al. 2021; Laesser 2021) or fall behind their own expectations (Gardini/Sommer 2023; Borkmann 2020). Furthermore, the digital research and innovation landscape, technology diffusion, and the knowledge level of employees in the tourism and hospitality sector still

show very low values compared to other industries (Demary/Goecke 2021; Hotelhero 2020). Digitalisation hits the tourism and hospitality industry at two of its weakest points, highlighting a longstanding need for systematic innovation management and professional human resource management. Employees in recent years not only face a continuous image crisis in the industry but also find that leadership culture and principles in much of the tourism and hospitality sector strongly contradict the requirements of digital transformation processes and the characteristics of a digital mindset. Leadership styles are often perceived as conservative, patriarchal, authoritarian, hierarchy-focused, and less employee-oriented (Francis/Baum 2018; Gardini 2016; Kusluvan et al. 2010). Holding onto outdated corporate cultures, a lack of risk readiness, and rigid forms of organizational structure are particularly critical given the expectations of Generations Y and Z, who anticipate not just a digital mindset from their future employers but also seek different lifestyles and work approaches compared to their predecessors.

If one assumes that digitalisation is a central element of corporate strategy and transforms a company at all levels, both academia and practice are in agreement (Kollmann 2020; Gnamm et al. 2018): "Digitalisation is a top management issue" when it comes to the digitalisation and the relevance of the digital for the success or failure of a company. Successful leaders in tourism and hospitality, whether individuals, companies, or institutions, generally have a quite precise idea of what they want or do not want, and what they are willing to do for it. From a leadership perspective, a normative approach is necessary for every tourism and hospitality company, emphasizing the philosophical and cultural dimension of digital transformation processes and initiating a development process with a focus on the specific identity of a destination, hotel or restaurant (Goran et al. 2017). The ultimate goal is an unequivocal market-oriented and customer-centric understanding of the organization, transcending digital or analog identity struggles (Gardini 2021).

Conclusion

It can still be asserted for the tourism and hospitality industry as a whole that the strategic and cultural dimension of digital transformation is still underestimated by many stakeholders. Leadership in times of digital transformation however, demands, in addition to a strategic approach, nothing less than a strong intellectual and cultural adaptation, especially requiring openness, flexibility, and engagement from all stakeholders involved. The use of technology should always be a means to an end, with

a clear focus on creating substantial customer value and ensuring the competitiveness and future viability of the company. While traditional players show a certain openness and willingness to embrace new digital technologies and work methods, it must be acknowledged that the economic and digital reality is still moving significantly faster than the psychology and mindset of those involved in this process. A significant future challenge for many tourism and hospitality companies is, therefore, to develop a comprehensive understanding of digital and analog management throughout the entire organization, going beyond individual activities, instruments, and analysis methods. This is crucial to transition from being driven by technological developments to being the driver of company-specific digitalisation activities and thus creating the conditions to continue thriving in competition.

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