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Each quarter, Pinnacle Advisory Group prepares an analysis of the New England lodging industry, which provides a regional summary and then focuses in depth on a particular market. These reviews look at recent and proposed supply changes, factors affecting demand and growth rates, and the effects of interactions between such supply and demand trends. In this issue, the authors spotlight the lodging market in Providence, Rhode Island.

Brand Heritage and Heritage Tourism
Bradford Hudson

Brand heritage is an emerging topic within the marketing discipline, which suggests that the consumer appeal of products and services offered by older companies may be enhanced by the historical characters of their brands. The shared nomenclature with the established field of heritage tourism is more than coincidental, as both concern the interplay of history with contemporary visitor behavior. This conceptual article explores the common elements of brand heritage and heritage tourism, while also clarifying some important differences between the two fields.

The Front Desks of Boston
Michael Oshins

The role of hotel front desks has not changed significantly in more than a century. The activities of welcoming guests upon arrival, assisting guests during their stay, and settling accounts upon departure are still the mainstay of the front desk. Although the function of the front desk has remained static, its form has evolved. Front desks now differ widely in terms of aesthetics and, in some cases, even operational patterns. This article offers photographs of numerous hotel front desks in Boston and provides brief commentaries that provide insight about the changing nature of front desk design.

Defining the New Luxury: Perspectives from Industry Leaders
Chekitan S. Dev

The concept of luxury is ancient. The concept of premium accommodations for average consumers was pioneered by innovative hoteliers during the nineteenth century. During the years that have followed, the idea of a luxury hotel has been reinvented several times. Today the concept of luxury is arguably being transformed once again, as the consumer market becomes more democratized and the economic influence of new markets becomes more pervasive. To explore this idea more deeply, a group of industry leaders convened a panel discussion during the New York hotel show.

The Ethic of Hospitality
Christopher Muller

The idea of hospitality is evident in several types of human behavior including obligatory duties, commercial activity, and prosocial action. These are intertwined and revolve around the commitment to caring for others whether they are relatives, guests, or strangers. This article explores the ethic of hospitality in its various forms.

Buffet-Américain
Peter Szende

The Exposition Universelle or World’s Fair held in Paris during 1855 was a catalyst for the creation of numerous related exhibits, attractions, and businesses in the neighborhoods surrounding the exhibition grounds. One of these was an innovative restaurant concept in which consumers could eat or drink while standing, known as a buffet-Américain or American buffet. This article features a reproduction of a vintage advertising poster for one such restaurant, created by the celebrated nineteenth century French commercial artist Jean Alexis Rouchon.
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Each quarter, Pinnacle Advisory Group prepares an analysis of the New England lodging industry, which provides a regional summary and then focuses in depth on a particular market. These reviews look at recent and proposed supply changes, factors affecting demand and growth rates, and the effects of interactions between such supply and demand trends. In this issue, we spotlight the lodging market in Providence, Rhode Island.

New England Summary

Revenue per available room (REVPAR) for the region grew by 5.4% in the first quarter compared to a growth rate of 5.6% for the year in 2012. While growth in the region lags behind the country as a whole, which had REVPAR growth of 6.4%, it is important to note that the first quarter is the slowest for the region due to seasonality and is the last to recover following economic downturns. The first quarter this year was also impacted by the extremely mild winter of 2012 and the fact that there were several weekend snow storms that impacted leisure travel.

Performance by State

Connecticut

Connecticut had a very strong first quarter, outpacing the region and the nation as a whole in terms of REVPAR growth. The primary factors fueling the growth were limited new supply (0.2%) coupled with strong growth in demand, which together resulted in strong occupancy growth. Demand in Connecticut appears to be picking up steam, growing by 5.5% in the first quarter as compared to a decline of 0.3%
for 2012. In Southwestern Connecticut, demand was fueled by a project at the submarine base in Groton that is expected to go through June. Demand in the Hartford area benefitted from strong transient corporate travel.

**Maine**

Demand in Maine declined by 2.7% in the first quarter. That decline, coupled with a slight increase in supply, helped to push occupancy down from 41% to 39% for the state. This is surprising given the strong winter for skiing, but it reflects the fact that ski-related lodging represents only a small portion of total lodging supply in the state, and weekend snowstorms impacted non-ski travel. The state did, however, benefit from strong growth in average rate, which outpaced the rest of the region and the country as a whole, growing by 4.0% compared to only 2.3% for the year in 2012.

**Massachusetts**

Massachusetts experienced growth in demand of 2.8% compared to only 1.8% during 2012. Growth in supply remained fairly steady, at a manageable rate of 0.6%. Occupancy grew by 2.2%, which was above 2012 levels, but average rate growth slowed from 6.7% in 2012 to 3.1% during the first quarter of 2013. Occupancy levels are at their lowest levels in the first quarter (55% in the first quarter of 2013) as compared to the year as whole (66% for 2012). As a result, there is less of an imbalance between supply and demand and fewer high demand periods where operators can significantly drive their average rates. Therefore, average rate growth for the year is likely to exceed the 3.1% achieved in the first quarter.

**New Hampshire**

New Hampshire was the only state in the region to experience a decline in REVPAR during the first quarter. The decline is not surprising, given that it benefitted from the presidential primary elections in the first quarter of 2012. In addition, New Hampshire also had the strongest increase in supply, growing by 1.6%. The state's occupancy performance would likely have been worse had it not been for strong demand from skiers and snowmobilers. The impact of the primary election demand in 2012 is most apparent in the decline in average rate. The primaries create a period of very strong demand that allows operators to increase rates significantly above what they normally charge during that time of the year, as election teams and members of the media flood the state.

**Rhode Island**

Demand for hotel rooms in Rhode Island grew by 5.0% in the first quarter, putting it just behind Connecticut in terms of growth in the region and well above the national average of 2.6%. It also represents a significant increase over its 2012 growth of 1.8%. This suggests that Providence, the largest market in the state, may finally be recovering from several years of lackluster performance. Average

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**EXHIBIT 1**

New England REVPAR Growth Still Strong but Slowing

<table>
<thead>
<tr>
<th>Key Hotel Operating Statistics Year to Date Percent Change Through March 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Market Area</strong></td>
</tr>
<tr>
<td>-----------------</td>
</tr>
<tr>
<td>Total United States</td>
</tr>
<tr>
<td>New England</td>
</tr>
<tr>
<td>Connecticut</td>
</tr>
<tr>
<td>Maine</td>
</tr>
<tr>
<td>Massachusetts</td>
</tr>
<tr>
<td>New Hampshire</td>
</tr>
<tr>
<td>Rhode Island</td>
</tr>
<tr>
<td>Vermont</td>
</tr>
</tbody>
</table>

*Source: Smith Travel Research*
rate growth for the state, while above last year at 2.3%, was rather tepid as compared to the national average of 4.5%.

Vermont

The Vermont lodging industry continues to be very strong, with REVPAR growth of 8.0%. It was the strongest growth rate in the region, and follows on 2012 when it also finished with the strongest rate of growth at 7.7%. In addition to a very strong winter for skiing, the state also likely benefitted from Canadian travelers encouraged by the exchange rate and by a decline in supply.

Anticipated Changes

We are watching several market areas over the next 6 to 12 months. These include the following.

Burlington, Vermont

The Hotel Vermont is expected to open in May with 125 rooms and 3,000 square feet of function space in a prime downtown location. A new Hilton Garden Inn is also under development with an expected opening in 2014. In suburban Burlington, a developer has plans to build a new Hampton Inn in Williston.

Cape Cod, Massachusetts

Hotel operators on the Cape are enthusiastic about the coming season, but many are concerned about the impact of the new train service between Boston and Hyannis. They are also concerned about the impact of the new Doubletree Hotel, which reopened at the end of July 2012 after being closed for 8 months and converting from a Radisson.

The Pioneer Valley, Massachusetts

In downtown Greenfield, a developer has proposed a 62-room Best Western through the adaptive reuse of a former department store. To the south in Northampton, there is speculation about the conversion of a former hospital to hotel use, and a local developer also has plans to build a new Fairfield Inn.

Portland, Maine

A large annual citywide convention that normally occurs in late May or early June has been pushed out of town this year, due to renovations at the Civic Center. Operators remain optimistic, as group booking pace looks strong and the Westin renovation is behind schedule, with the reopening date pushed back from Fall 2013 to Spring 2014.

Projections

The regional lodging market remains strong. Snow storms and colder weather, which had a negative impact on leisure travel though most of the region, were off-set by strong commercial demand. With the strong demand, operators were able to increase average rates, leading to respectable growth in REVPAR. The continued growth in REVPAR has led to renewed development, with plans for new hotels throughout the region. While new supply is likely to impact some markets, meaningful new supply is not expected to impact performance until the middle of 2014 at the earliest.

Spotlight on Providence, Rhode Island

Providence is the capital of Rhode Island and the most populous city in the state, and it was one of the first cities established in the United States. Currently, there are nine hotels in Providence with a combined total of 2,295 guest rooms. The Providence lodging market has experienced cyclical occupancy and room rate patterns similar to regional lodging trends. However, while market occupancy has improved dramatically since the 2009 recession, room rates are still well-below levels before the recession.

Between 2000 and 2004, Providence’s market occupancy ranged from 70% to 77%. In 2005, market occupancy started to decline, hitting a low of 57% in 2009. Since that time, the Providence market has experienced substantial improvements, increasing to 64% in 2010, 65% in 2011, and 68% in 2012.

Although lodging demand has recovered, the average room rates in Providence have not. While ADR is improving with positive growth in 2011 and 2012, the steep decline between 2008 and 2009 will take years to get back to historic levels. Specifically, the ADR in 2007 was $154.35, but in 2009 ADR fell to $130.92 and then fell again in 2010 to $127.11. As a result of the stronger uptick in demand, and the recent ADR growth, the REVPAR in Providence reached $93 in 2012, but as noted in the table below, this falls well short of the $97 RevPar in 2007.

The primary drivers of lodging demand in
Providence are corporate, tourism, education, and groups attending meetings at conferences at the Rhode Island Convention Center. The education and healthcare sector is one of the largest employers in the metropolitan statistical area (MSA), anchored by the Lifespan Health System and Brown University. This sector accounts for 21% of total employment. In late 2011, state and city officials began developing a ‘Knowledge District’ in downtown Providence. Brown University spent $45.0 million to renovate a building for its medical school in this district. In addition, Johnson & Wales University plans to expand its campus, and the University of Rhode Island and Rhode Island College plan to build a joint nursing school for a reported $60.0 million in the Knowledge District. Headquartered in the City of Providence, RBS Citizens Financial Group is one of the 15 largest commercial banking companies in the country, with a reported asset base of $140.0 billion.

In the aftermath of the recent recession, the Providence region has started a long, measured process towards a recovery. Due to the weak business environment and the relatively high unemployment rate, revitalization in the Providence MSA will continue to progress, but at a slower rate than the nation as a whole.

Supply

There are no major changes planned with respect to new supply in Providence in 2013 or 2014. The most recent new supply increase was in 2009, when the Hampton Inn and Suites opened in downtown Providence. There have been several recent shifts in ownership and brand changes.

The Biltmore

The Biltmore was purchased in May 2012 from state receivership by Finard Coventry Hotel Management. The new owners acquired the hotel for $16 million and are in the process of conducting a $16 million, two-year renovation of the hotel. Once completed in early 2014, the hotel will operate as a three-diamond hotel, being positioned as “the finest, yet affordable hotel in the state”. The owners of the hotel recently agreed to a new collective bargaining agreement with the applicable labor union.

The Renaissance

The Renaissance was purchased by The Procaccianti Group and Rockbridge in early 2013 from Sage Hotels. Although it is not entirely certain, the hotel will likely remain a Renaissance by Marriott Hotel.

The Westin

In January 2013, the Westin Hotel was sold to Omni Hotels and immediately converted to the Omni brand.

The Sportsman Inn

The Sportsman Inn, a former adult entertainment venue, was purchased. It is rumored to be the subject of renovation and conversion to a 60–room boutique hotel. This hotel will probably not be open until late 2014 or early 2015.

Demand

Market segmentation for the Providence lodging market is approximately 70% transient and 30% group. The following is an overview of demand in each segment.

Transient

Approximately 70% of lodging demand in Providence is transient demand. This is comprised of both leisure transient and corporate transient types. Corporate transient demand is generated from visitors to local businesses, while leisure demand is primarily a function of tourism, as well the abundance of higher education in the city.

Commercial demand in Providence is generated primarily by the number of corporate tenants

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**EXHIBIT 2**

Lodging Performance in Providence, 2007-2012

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012 (est)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupancy</td>
<td>63.1%</td>
<td>60.7%</td>
<td>56.5%</td>
<td>63.8%</td>
<td>64.6%</td>
<td>68%</td>
</tr>
<tr>
<td>ADR</td>
<td>$154.35</td>
<td>$145.86</td>
<td>$130.92</td>
<td>$127.11</td>
<td>$129.94</td>
<td>$137</td>
</tr>
<tr>
<td>REVPAR</td>
<td>$97.35</td>
<td>$88.50</td>
<td>$73.96</td>
<td>$80.66</td>
<td>$84.29</td>
<td>$93</td>
</tr>
</tbody>
</table>
in the surrounding area. The downtown Providence office market ended 2012 with a vacancy rate of 16%, slightly higher than the 15.9% level at the end of 2011. There was significant positive absorption in the Class A sector, leading to the lowest Class A vacancy rate in nearly a decade. The largest generators of commercial room night demand include GTECH, AMGEN, RBS Citizens Financial Group, Hasbro, State of Rhode Island, City of Providence, Textron, Bank of America, CVS/Pathmark, Blue Cross Blue Shield, and the universities and hospitals.

Providence's historical significance drives much of its tourism industry and produces significant leisure demand. The primary tourist destinations are along the Providence River and within downtown Providence. These attractions include the Providence River Walk, Roger Williams Zoo, John Brown House Museum, Battleship Cove, Providence Children's Museum, Providence Piers, WaterFire Providence, Rhode Island School of Design Museum, Museum of Works and Culture, and various shopping districts including Federal Hill and the Providence Place Mall.

Within a half-hour drive of Providence is the Rhode Island coast and the very popular tourist destination of Newport. Most of the coastal Rhode Island communities have excellent access to the Atlantic Ocean, Narragansett Bay, and ancillary beaches.

In addition to tourism, there are several major colleges which provide significant leisure demand. These include Brown University, Rhode Island School of Design, Johnson and Wales, and Providence College. Leisure traveler demand is strongest on weekends in the spring, summer, and fall months.

Demand growth in the transient segment has been improving since the 2009 recession. While there are no major events, attractions, or developments underway that will dramatically increase transient lodging demand in the near future, overall economic improvement in Providence and the region will continue to spur modest growth.

**Group**

Meeting and group demand includes groups that reserve blocks of rooms for meetings, seminars, trade association shows, and other similar group gatherings. Meeting and group demand is typically strongest during the spring and fall months, while the summer months represent the slowest period for this market. Meeting and group travelers typically achieve an average length of stay of three-to-five days.

Meeting and group demand in the Providence area is driven by venues facilities in local hotels, university halls, the Rhode Island Convention Center, and the Dunkin Donuts Center. Providence's five full-service properties (Biltmore, Hilton, Marriott, Renaissance, and Westin) are the primary hotels supporting group demand. These properties have combined meeting space of approximately 69,000 square feet.

The Rhode Island Convention Center, built in 1994, is the largest convention center in the State. This facility has approximately 100,000 square feet of exhibition space, 20,000 square feet of ballroom space, 23 meeting rooms, and 30,000 square feet of pre-function space. It is connected to the Dunkin Donuts Center. The Rhode Island Convention Center had an excellent year in 2012. According to the Tap Report, there were 153 definite events in 2011, compared to an estimated 178 events in 2012. Total room night demand from the Convention Center in 2011 was 287,602, while room night demand from the Convention Center was an estimated to have increased 11% increase in 2012.

The strength of the Convention Center was one major factor in the continued upturn in demand in the Providence lodging market. Based on both the definite and tentative booking at the Convention Center, 2013 should be a reasonably good year for group demand in Providence.

**Demand Conclusion**

Lodging demand in the Providence market is expected to continue to experience modest growth into the foreseeable future. Corporate, leisure and group demand growth is expected to experience gradual, measured growth in the absence of any major corporate expansions, new attractions, or more robust group and convention demand in the market. In 2012, overall lodging demand growth in the Providence was approximately 4%. We expect positive, albeit slower, growth in 2013 in all demand segments within the lodging markets.

**Average Rate**

Room rates are the biggest challenge within the Providence market. While average daily rate (ADR) increased above 5% in 2012, average room rates are still well below historic room rate levels. At its peak in 2007, the ADR in Providence was $154. After several years of declining room rates, the market
reached bottom with $127 in 2010. In 2011, the ADR improved slightly to approximately $130. Most recently, the ADR reached $137. And while the local operators are pleased with the uptick in room rates, the Providence market still has a way to go until it reaches the peak ADR.

2013 looks promising for ADR growth. Changes in ownership, re-branding, and renovations will likely mean higher rates, as owners push the operators to gain above inflationary room rate increases. Room rates are up over 3% year-to-date in Providence, and by year-end we expect to see room rates increases of 4%.

**Projections**

We expect 2013 to be an improvement over 2012 for the Providence lodging market. Specifically, we expect occupancy to grow by approximately 1%, with average rates growing by 4% for a REVPAR increase of approximately 6%. There is no new supply for 2013, and the substantial renovation at the Biltmore, along with various flag changes and ownership, all bode well for the Providence lodging market. Furthermore, without new supply in 2014, the Providence lodging market should once again see an upward trend in occupancy, room rate, and REVPAR.

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Brand heritage is an emerging topic within the marketing discipline, which suggests that the consumer appeal of products and services offered by older companies may be enhanced by the historical characters of their brands. The partially shared nomenclature with the well-established field of heritage tourism is more than coincidental, as both concern the interplay of history with contemporary visitor behavior. This conceptual article explores the common elements of brand heritage and heritage tourism, while also clarifying some important differences between the two fields.

**Brand Heritage**

The idea that brands may have a heritage dimension emerged at least a quarter century ago, when it was suggested in *Harvard Business Review* that the historical approach could provide brand images and themes for advertising. The term “brand heritage” was also mentioned in early work on brand equity by David Aaker, as an element of brand identity, but the topic was not explored in any depth. There has also been a recurrent but steady stream of literature on topics relating to older companies and their brands. This includes articles about the status and benefits of organizational longevity, and the benefits that may accrue from residual brand equity. It also includes topics such as authenticity and nostalgia.

Scholars working in the area of corporate marketing and brand identity have recently suggested that historic brands constitute a distinct conceptual category. Mats Urde, Stephen Greysen, and John Balmer have argued that such brands require a different approach to brand management than younger brands. Activities related to brand heritage include
uncovering aspects of heritage through archival and consumer research, activating that heritage through product design and marketing communications, and protecting that heritage through stewardship and attention to continuity.

Examples of marketing related to heritage include the citation of company founding dates on packaging or in advertising, the celebration of corporate anniversaries, and the reprise of discontinued jingles or mascots. Such marketing may also involve references to a company in historical context or to iconic artifacts in possession of the company. It could even include the creation of updated products that incorporate visual elements from prior versions, or the design of new offerings that refer to idealized or artificial memories of historical reality.

An excellent case of the brand heritage phenomenon is provided by the Cunard Line, which was founded in 1839 and eventually became the most famous operator of transatlantic ocean liners. The brand was acquired in 1998 by Carnival Corporation, which reinvigorated the underperforming company by paradoxically focusing on both innovative product development and retrospective brand positioning. The result is new ships such as Queen Mary 2, which offer an integrated blend of modern amenities with historical references embodied in design, communications, and operations.

Scholars working in the area of brand heritage hope to explain the nature and attraction of older brands, investigate the use of historical references in current marketing, explore the heritage aspects of brand equity, offer an additional dimension to discussions of product lifecycle, and develop practical tools for executives who manage historic brands.

**Differences in Focus and Scope**

The fields of brand heritage and heritage tourism are closely aligned. Their theoretical foundations often overlap, some of the tourism literature predates similar work on brands, and brand researchers have cited tourism precedents regularly. However, before delving into these commonalities, it may be useful to examine the divergence between them. A clarification of the focus and scope of each topic will explain why these are separate sub-disciplines. The differences are several.

First, brand heritage focuses exclusively on marketing. It can be broadly defined to include consideration of the various financial, managerial, and operational issues that influence marketing decisions. This is especially important in services marketing, which concerns the interplay of production and marketing. Nonetheless, brand heritage is circumscribed by the marketing discipline and does not fully encompass the various functions of management.

In contrast, marketing is only one aspect of heritage tourism. The field also includes topics such as venue and visitor management, interpretation and education, historic preservation, and environmental sustainability.

Second, brand heritage considers the overall brand of a corporation and the subsidiary brands of its products or services. Related geographic locations, such as the sites of manufacturing or distribution facilities, are usually either unknown to the consumer or irrelevant to the buying decision. It could be argued that country of origin effects may influence consumer behavior in some instances, but this has not yet been demonstrated in the context of brand heritage. In any case, brand heritage is not exclusively or predominantly geographic.

In contrast, geography is often an important issue in heritage tourism. Perhaps the clearest examples of heritage tourism involve travel to particular locations such as historic cities, the birthplaces of famous individuals, or archaeological sites. Even when a broad cultural category is involved, it is often difficult to separate history from geography.

Third, brand heritage often involves the extension of brand identity onto new products that have no inherent historical characteristics or for which the historical element is understood to be trivial and falsified. In the case of the former, the brand heritage is separated from the immediate value proposition and the historic nature of the brand may function as an extrinsic cue for issues related to longevity, such as expertise or quality. In the case of the latter, the historic nature of the brand may be referential and intended to invoke an affective reaction, such as humor or nostalgia. The offering is understood to be a commercialization and interpretation of some related genuine artifact.

In contrast, heritage tourism often requires originality and an unbroken connection between any offering and its corresponding historical reference. Even when reproductions are involved, they usually incorporate genuine artifacts (such as antique furnishings within a new building) or they are located on the exact site of any related historical event. The offering is understood to be as genuine and historically accurate as possible.

Fourth, brand heritage is oriented toward commercial endeavors in the private sector. The basic
principles could be applied in other situations, but it is essentially a business subject. Cultural factors are relevant only in the context of consumer behavior, while political factors are peripheral issues that merely constrain marketing strategy. It could be argued that the increasing emphasis on corporate social responsibility requires an enlargement of this characterization. Nonetheless, the motivating factor in brand heritage is economic rather than social.

In contrast, heritage tourism is mostly a phenomenon of the public sector, broadly defined to include both government and non-profit organizations. The purposes of such offerings include cultural enrichment, education, and the creation or preservation of collective or national identity. There are exceptions, such as commercial attractions sponsored by firms to describe their historical origins, but these are often driven by peripheral social objectives and have vague connections to marketing strategy. Heritage tourism is seamlessly integrated with public policy in a way that brand heritage is not.

Lastly, brand heritage is usually oriented toward outbound distribution. Products or services emanate from a vague central location and are consumed remotely in retail units or at home. The exact distribution site is usually irrelevant and changeable.

In contrast, heritage tourism is usually oriented toward inbound distribution. The specific and unique geographic location is an important part of the value proposition for consumers. Given the relationship to public policy, it may not be possible to move the delivery location, even if logistically feasible. Distribution is inseparable from the local marketplace and the extended travel system, offering additional complexities in forecasting and ensuring demand. There are also usually limits to operational capacity and constraints on the ability to grow the brand.

The Hospitality Sector

An exception to some aspects of the divergence between brand heritage and heritage tourism is provided by the category of business for which consumer environments are an integral part of the value proposition. This includes the retail industry, especially companies with iconic flagship stores such as Harrods. It also includes the hospitality sector and its component industries including hotels and lodging, restaurants and foodservice, theme parks, and golf and leisure venues. For older firms in these industries, the dynamics of brand heritage and heritage tourism are often intermingled. The hotel industry offers an excellent case in point.

Unlike the manufacturing sector and many industries in the service sector, the hotel industry is geographically dependent. Even companies with multiple units and global brands that transcend specific regional associations have operations that are geographically specific. Many individual properties have their own distinct names, especially historic hotels that predate current management agreements. For iconic hotels such as the Parker House in Boston, now operated by Omni, these names are widely known and constitute subsidiary brands. Many guests choose these hotels over competing alternatives because of their historic status, and some are even motivated to travel for the purpose of staying at famous hotels.

The hospitality sector not only tends toward geographic dependence, but also toward property dependence, meaning that it is constrained by a long term commitment to particular structures or land. For an iconic hotel whose identity is inseparable from its architecture, preserving the condition of the building and managing its relationship with the surrounding environment are important tasks. The marketing ethic must extend from sales to stewardship, marketing responsibilities must include involvement in design and construction, positioning exercises must consider the social and cultural context, and marketing activities must be enlarged to include interaction with political leaders and community activists. Thus in the hotel industry, brand
heritage encompasses a wide variety of duties in management and public policy, in manner similar to heritage tourism.

In manufacturing, the extension of brand heritage from genuine artifacts to reproductions may be relatively simple to accomplish. In the hotel industry, the task becomes more complicated. An older company with hundreds of hotels, encompassing both historic and modern properties, can probably extend its brand to a new development without losing any brand associations. However, an independent hotel may have problems when similarly extending its name to another property (or even a building extension) for the first time, as the positive brand effects from the original hotel may not transfer to the new location. Under such circumstances, maintaining an explicit connection with the original hotel will help alleviate doubts among consumers, but there may still be resistance and disappointment among those who are concerned about authenticity. Thus in the hotel industry, brand extensions for historic hotels may be constrained by the same dynamics evident for heritage tourism venues.

Unlike the manufacturing sector and many industries of the service sector, the hotel industry has inbound distribution. Consumers travel from many different locations to the centralized production facility. Distribution is dependent on the extended travel system, supply is constrained by fixed capacity, and growth is often precluded by the surrounding neighborhood. Thus the hotel industry shares many of the characteristics evident in heritage tourism scenarios that relate to inbound distribution.

Similarities in Theory

Despite the differences in focus and scope highlighted above, there are many underlying similarities between brand heritage and heritage tourism. The most significant common elements are comprehensive frameworks borrowed from two other disciplines.

The first is the framework of history. This includes the historical paradigm, meaning a way of thinking about the nature of human behavior and social institutions by examining their changes over time. The framework also includes the specifics of historical research methodology, the historical narrative as a form of expression deemed to have scholarly validity, and the vast content of our accepted historical inventory on trends and events ranging from military conflict to economic development. Even if history is creatively or selectively adapted to construct a particular interpretation, the basic historical approach is followed. Exploring, understanding, and interpreting the past are important in the marketing and management of heritage, whether for older companies or ancient cultural sites.

The second framework is that of marketing. Almost every aspect of basic marketing theory can be applied to either historic products or historic sites, ranging from strategy and market research to consumer behavior and communications. Any heritage site that attracts visitors, even those with managers who consciously eschew promotion, is subject to marketing phenomena.

Brand heritage and heritage tourism also share three important conceptual underpinnings. Although less comprehensive than the frameworks discussed above, they are nonetheless rich in theoretical content.

The first concept is that of identity. In the field of brand heritage, the exemplary article emerged from scholars working in the domain of corporate identity. Subsequent work has suggested that the history embedded in a brand is operative in defining the identity of the brand, but may also be involved in defining the identity of the consumer who acquires products of the brand, in a form of symbolic interactionism. Similarly in the field of heritage tourism, the definition and preservation of identity is a key theme.
The second shared concept is that of nostalgia. This involves a longing for the past, a sentimental recollection of yesteryear, or a penchant for objects or experiences that are associated with a prior era. The phenomenon of nostalgia has been studied in disciplines such as sociology and psychology, and has also been explored extensively in marketing literature related to older brands and products. Similarly in heritage tourism, nostalgia has been discussed extensively.

The third shared concept is that of authenticity. This considers the dichotomy between the true and false nature of objects or people, suggests that originality is preferred, and implies that reproductions are not legitimate. The topic of authenticity has been examined in a range of disciplines including American studies, anthropology, psychology, and sociology. It has also been explored in marketing and consumer literature, and represents an integral part of recent scholarship on brand heritage. Similarly in heritage tourism, authenticity has been discussed extensively.

FURTHER READING

Readers interested in learning more should begin with the following publications. A comprehensive introduction to the subject of heritage tourism is offered by Dallen Timothy and Stephen Boyd in their textbook *Heritage Tourism* (Pearson Prentice Hall). An excellent analysis of the concept of brand heritage is offered by Mats Urde, Stephen Greyser, and John Balmer in their article “Corporate Brands with a Heritage,” which was published in the *Journal of Brand Management* (2007). An example of brand heritage in the hospitality sector is offered by Bradford Hudson in his article “Brand Heritage and the Renaissance of Cunard,” which appeared in the *European Journal of Marketing* (2011). The bibliographies and citations in these publications will lead interested readers onward to a wide array of academic, professional, and popular books and articles on topics related to heritage.

The Interplay of Brands and Venues

Academics working in the fields of brand heritage and heritage tourism, as well as practitioners working with older brands or tourism venues, should be aware of the similarities and differences between these two topic areas. In some cases, conceptual principles and marketing tactics may be transferrable, and consideration of heritage practices in either realm may offer new perspectives. In other cases, a better understanding of these fields may discourage attempts to duplicate elements or methods that may be inappropriate.

For the hospitality sector in particular, there is much to be learned at the intersection between brand heritage and heritage tourism. Historic hotels may have multiple layers of brand heritage, involving both older corporate brands and the names of specific historic properties, which generate consumer demand. For many historic hotels, the buildings may also be integral parts of broader historical neighborhoods or landscapes, which generate tourism demand.

This multidimensional character is exemplified by the Château Frontenac. The famous hotel displays the Fairmont corporate brand, but enjoys even higher awareness for its specific property name. It is also located adjacent to the Citadelle, at the epicenter of the historic district of Québec City, which has been designated a World Heritage Site by the United Nations Education, Scientific and Cultural Organization (UNESCO).

In such instances, the conceptual overlap between brand heritage and heritage tourism constitutes more than a point of intellectual curiosity. The marketing of historic hotels can often benefit from the application of principles in both fields, and these related disciplines should be considered in an integrated fashion by both academic researchers and industry practitioners.

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The role of front desks has not changed significantly since the Parker House, the longest continually operating hotel in the United States, opened in 1855. The activities of welcoming guests upon arrival, assisting guests during their stay, and settling accounts upon departure are still the mainstay of the front desk.

Although the function of the hotel front desk has remained static, its form has evolved. Front desks now differ widely in terms of aesthetics and, in some cases, even operational patterns. These variations derive from the physical characteristics of particular hotels, architectural and design trends, the strategic positions of properties and brands, advancements in hotel operations, and the changing expectations of consumers.
OLD WORLD CHARM
Early designs separated employees from guests, in the same way that an orchestra pit separated the actors from the audience in a theater. The purpose was both practical and symbolic, to provide security and to reinforce a sense of formality. This is illustrated by the front desks at two of the oldest hotels in Boston, the Parker House (left) and the Lenox (right). Notice the dark wood, marble counters, ornate decoration, and gold highlights that were typical of the era.

THE RACK
Before the advent of computerized reservations systems, hotel managers used racks to organize room keys, account statements, and guest messages. The common industry term 'rack rate' derives from this era, and is now widely used to denote the highest published rate for a room. The Beacon Hill Hotel & Bistro, which was created by combining two nineteenth century townhouses, still uses their rack (visible under the counter along the wall) in conjunction with their computer system.

CHANGING WITH THE TIMES
When the Four Seasons opened (top), the front office had separate areas for the functions of checking in and checking out. A small alcove was inset to the left of the main desk, to create a private space to discuss the sensitive topic of finances. When the lobby was renovated two decades later (bottom), these areas were combined into a single front desk.
ADAPTED REUSE
As the oldest major city in the United States, Boston has numerous historic buildings that been converted to new uses, including lodging. The Liberty Hotel was originally the Charles Street Prison (left). The Loews Back Bay Hotel was originally the headquarters for the Boston Police (right top). The Langham Hotel was originally the Federal Reserve Bank of Boston (right bottom). The front desks of these converted hotels were designed to fit into the re-purposed spaces.

SIZE MATTERS
The size of the front desk is often proportional to the size of the lobby, the surrounding public spaces, and the hotel exterior. The Sheraton (below), the largest hotel in Boston with more than a thousand rooms, also has one of the largest lobby and front desk areas in the city. Toward the other end of the size continuum, the luxury boutique hotel XV Beacon (left) has a mere 63 rooms and a similarly small lobby, with a front desk suitable for one person.

A REAL DESK
At the Ritz-Carlton, arriving guests are seated and checked-in at ‘real’ desks. This is the only hotel in Boston with this feature, which is more common among luxury hotels in Europe.
SIMPLE YET ELEGANT
As decades change, so do consumer preferences. Hotels built during the past decade often highlight modern and post-modern style including geometric shapes and minimalism. The Renaissance (left top), the InterContinental (left bottom), and the Mandarin Oriental (below) illustrate these sleeker trends.

EXCITING AND INTIMATE
The atrium is a design element that originated millennia ago, in both residential and lodging properties. Atrium hotels gained renewed popularity during the 1970s after architect John Portman created a series of stunning properties for Hyatt. Although visually exciting, atrium spaces can be quite noisy. This interferes with private discussions between customers and front desk employees about finances, personal requests, and room assignments. Such hotels often remove their front desks from the larger open space and use lower ceilings to create more intimate settings. Examples include the Marriott Copley Place (below), the Marriott Long Wharf (right top), and the Westin Waterfront (right bottom).
REMOVING BARRIERS

The physical barriers that separated guests and employees during the nineteenth century have been replaced by more open designs that represent the breakdown of barriers, both physically and symbolically. Modular front desks provide more flexible, open, and accessible spaces. This newer format is used at the Hyatt Regency (top left), the Westin Copley Place (bottom left), the W Hotel (top right), and the Westin Waterfront (bottom right).

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Luxury is nothing new. The concept is ancient and global, at least for the privileged few who attained the special status of royalty.

The concept of premium accommodations for average consumers was pioneered by innovative hoteliers during the nineteenth century. During the years that have followed, the idea of a luxury hotel has been reinvented several times. Notable developments include the evolution of the luxury segment into branded chains over the past three decades.

Today the concept of a luxury hotel is arguably being transformed once again, as the consumer landscape becomes more democratized and the economic influence of new markets becomes more pervasive. A growing number of observers believe that a new era of luxury is upon us.

To explore this idea more deeply, a group of industry leaders convened a panel discussion during the ‘Hotel Show’ in New York during late 2012. In a series of animated exchanges over the course of an hour, the group shared their insights on defining the ‘New Luxury’ in hotels. A synopsis of this discussion follows.
What is the new luxury?

Joy Kull, in describing the new approach to luxury, suggested that communications are becoming more accessible. They are online, in your email inbox, or in a pop-up notification on your phone. Most importantly, they are customized. Gilt.com is pioneering this idea with a customized homepage that is tailored to your previous purchases, the items you have clicked on, and your demographic profile.

Richard Cotter explained that, while the concept of luxury has historically been aspirational, the ‘new luxury’ is now more inspirational, in the same way that couture design inspires the fashion industry. Using the term “bespoke” to define the new luxury, he compared emerging luxury hospitality services to being custom-fitted for a pair of shoes or a suit on Savile Row in London.

Chris Hunsberger defined ‘new luxury’ as a focus on consistency, while still providing individualized experiences.

Ellen Brown observed: “Luxury is less formal and materialistic since the downturn. Service is not only customized, but kinder and gentler. Guests appreciate service that is instinctive, not scripted.”

Is luxury a function of geography, ethnicity, or gender?

Cotter argued that geography is important, especially in seasonal locations. The adaptation of standards to patterns of demand is critical, but such standards must never be compromised below a “base of luxury” during the low season.

Brown observed that the new luxury customer is globally minded and culturally aware, so there are more similarities than differences among the different market segments.

Kull stressed that Gilt does not sacrifice quality when reaching out to different groups. In adding to the customization theme, she shared that Gilt Groupe personalizes products, services, and messages differently for men and women.

How do you engage with new luxury customers?

Hunsberger suggested using a broad digital platform to engage with guests, observing: “You need to be where the customers want you to be.”

Others echoed this sentiment and endorsed a broad portfolio of communication channels, including both legacy and social media, to engage with the new luxury guest. All agreed that mobile technologies are a key platform for further development.

Are boomers and millennials buying differently?

Kull stated her belief that younger luxury customers are a rapidly growing group that is more technologically savvy than predecessors. She revealed that “millennials” are her core consumers, and that Gilt is very careful how they represent luxury brands to this group. “We aren’t looking to tarnish [any] brand by offering discounted hotel rooms or wine,” she explained.

Hunsberger continued on this theme, suggesting: “Millennials are our future customers and many of us aspire to be like them, so we need to pay attention to them.” However, he cautioned that there are older millennials and younger millennials, young boomers and old boomers, each group having different needs and wants. Hunsberger revealed that Four Seasons has adopted relaxed grooming standards for staff, which are designed to appeal to younger guests. As an example, he shared that bartenders at the George V Hotel in Paris are allowed to have visible tattoos.

What are the products and services desired by the new luxury customer?

Cotter observed that his hotels are providing more amenities for customers, partly due to travel becoming more difficult and people becoming unable to pack certain items due to security procedures. This goes beyond mere bathroom amenities, to include customized guest rooms with special clothing and family photos staged in the room prior to arrival.
Brown added that luxury is no longer about how many amenities are placed in rooms. Rather, guests today feel enriched by what they return home with experientially. Aspirational experiences are the new equivalent of the luxury car in the driveway. She observed: “It’s up to us to provide access to those touch points and opportunities.” Brown also pointed out the increasing importance of local items to her guests. “People enjoy [local experiences] and want to try local foods,” she explained. In addition, she stressed the importance of aesthetics: “When you walk into a hotel and see a beautiful piece of art, it brings a smile to your face which is a big aspect of luxury.”

Kull suggested that her new luxury customers are brand-driven. “People are less likely to respond and purchase if the brand is lesser known, especially for wine,” she explained, encouraging brand managers to pay attention to building great brands.

**What is the importance of time to the new luxury customer?**

Hunsberger stressed that “time is of the essence” for the new luxury guest, and described the new 15-minute room service delivery guarantee at Four Seasons. “Customers do not want to wait,” he stated. He also described other ways that Four Seasons respects guest time, such as focusing on polite but quick encounters with room attendants.

**How does design and technology influence relationships with the new luxury customer?**

All the panelists touched on the importance of superbly equipped and naturally lit spaces, and state of the art communication technology. They also mentioned a balance of elegant design, while keeping comfort in mind when offering amenities for guests.

Everyone agreed that an opportunity existed to re-imagine the traditional arrival and check-in experience. Hunsberger shared that Four Seasons is experimenting with ‘in-car’ arrival processes using a tablet device.

**How is customization being used to serve the new luxury customer?**

Cotter indicated that his firm is placing additional emphasis on knowing more about its customers and adapting to their needs. He observed: “In some [instances], there are no limits to what we will do to accommodate a guest request.” Cotter stressed the importance of pre-arrival procedures to customize the stay as soon as the reservation is made, and cited the example of obtaining a bottle of rare vintage wine for a guest.

Brown concurred, suggesting: “Guests want to create their own worlds within ours, [constituting] a departure from traditional, cookie-cutter luxury brand experiences. They want a customized experience, which makes it essential for us to be a customer-centric company.”

**What constitutes value for new luxury customers?**

Several panelists stressed that the new luxury guest does not want to be “nickeled and dimed” in terms of billing for products and services. Cotter offered an example of guests who are willing to pay $1,500 per night for a room, but do not want to pay $15 for a glass of fresh-squeezed orange juice. Everyone agreed that luxury hotels must provide novel and differentiated guest experiences that are reasonably priced, culturally connected, and casually delivered in supreme comfort.

This was followed by a spirited discussion about luxury hotels charging for internet access. Cotter predicted that eventually internet access will be completely free in luxury hotels, but noted challenges, such as guests who leave their computer on all the time, affecting access availability and speed for others. “If we charge for internet access, unnecessary Wi-Fi connectivity decreases,” he explained.
Does the new luxury guest care about being green?

There was unanimous agreement that environmental or ‘green’ consciousness is very much in vogue. Kull observed that Gilt customers are becoming more aware of ‘green’ hotels and organic foods when making online purchases. Brown spoke about the increasing importance of environmental certification programs, such as LEED. Cotter urged everyone to think beyond ‘green’ to a wider array of socially responsible initiatives.

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The idea of hospitality is evident in several types of human behavior including obligatory duties, commercial activity, and prosocial action. These are intertwined and revolve around the commitment to caring for others whether they are relatives, guests, or strangers.

A Sense of Duty

The duty of hospitality is to family or tribe, as well as to strangers for whom cultural norms often mandate an obligation to host. This branch has a physical, social, and spiritual context. Such duty often incurs a personal cost, one based on the emotional commitment of kinship or honor. We come together because we are supposed to, but also because we feel a connection with others who are like us, a bond with those who share a common heritage. Many social or cultural bonds are built on the duty to family above all else, including shared meals and ceremonies.

It can be observed that most, if not all, of human ethical, religious, or moral teachings include some form of service to those outside the family or kinship unit. In ancient Greece, the responsibility to provide hospitality (xenia) defined behavioral duties for both the host and the guest. The application of this duty (philoxenia) is still defined as the hospitality revealed in love (philia) for the stranger (xenos). While thousands of years old, this is still...
a crucial component of our modern mobile social structure, in which everyone is a stranger at some time and place. The principle is especially important when applied to the traveler, the immigrant, the exile, or anyone considered to be an outsider. Consider the American day of Thanksgiving, an iconic national holiday during which families gather together to consume turkey with all the trimmings, the ultimate comfort food. The traditional, near mythical, New England roots of this festival are well defined. Images of Pilgrims and Native Americans sharing the bounty of the harvest have been exported to the rest of the nation and are now completely woven into our cultural tapestry.

In late November, we put aside our familial differences and sit for a few communal hours, hearing stories from otherwise ignored uncles and aunts, or even sisters and brothers. Many families welcome strangers to their midst, such as the college roommate of a child or sibling, who in turn praises the host who has been gracious enough to open their homes in hospitality. As the New England poet Robert Frost wrote: “Home is the place where, when you have to go there, they have to take you in.”

A Commercial Activity

The commercial is the branch that we associate with the business of welcoming paying guests at hotels or restaurants. The business of hospitality also extends to anyone who we compensate to care for our physical and emotional needs, including healthcare or social workers. There is a fine line between the innkeeper and the hospital administrator. We pay people to care for us when we travel, need to eat outside the home, or become ill. Any time our family is physically or emotionally unable to fulfill their duty to care for us, we rely on others for our welfare.

New England has strong roots in all facets of this commercial hospitality realm. The role of public inns as a mainstay of community life is well documented. As noted in previous editions of Boston Hospitality Review, the region claims some of the oldest surviving inns (Wayside Inn, 1716), restaurants (Union Oyster House, 1826), and hotels (Parker House, 1855) in the nation. The New England Inns & Resorts Association has origins dating to 1907, and precedes the founding of the American Hotel & Lodging Association.

The same is true of professional healthcare. The Massachusetts General Hospital (1810), one of the three oldest hospitals in the nation, was proposed by John Bartlett as a facility to care for the poor and indigent. The Boston Lying-In Hospital (1832) was one of the first hospitals dedicated to women and maternity. The Boston Home for Aged Women (1850) was formed to assist elderly single women, who might otherwise be consigned to the poorhouse.

A Prosocial Orientation

The third branch, the prosocial, is intertwined in the principles of the other two. Often termed altruistic, the term prosocial is defined by psychologist Nancy Eisenberg as “voluntary behavior intended to benefit another.”

Being in service to others, whether for duty or compensation, requires awareness of the needs of others and empathy toward them. The difference in the case of prosocial hospitality is that there is no expectation of reciprocity or personal gain from the behavior. The act of helping others who are either unknown or unrelated to the giver at the time of the act, involves a sense of hospitality that is genuine, but often inexplicable. Recent research suggests that prosocial behavior may be initiated after receiving signals from an organization or another individual. However, altruism appears not to be something that can be taught or even learned. It is often just simply done.

As is true with many professions, a proclivity for certain emotional rewards may be indicative of employee association and alignment. While there are many intervening variables, people with a desire to help others may naturally gravitate towards lodging, restaurants, healthcare, or other service-oriented employment. This could come from a sense of duty, a desire for economic gain, or simply because of a need to engage in prosocial work. But when that work involves volunteerism at non-profit events, including time spent working for charities and social organizations, the focus often changes from a duty or the commercial to prosocial hospitality.

New England is home to many organizations providing hospitality in a prosocial manner. Two examples are Community Servings in Jamaica Plain, Massachusetts and the New England Center for Homeless Veterans in Boston. These organizations were founded to help small targeted populations, but each has expanded to benefit thousands of individuals through the generosity of volunteers and donors.

Community Servings produces and delivers free meals for individuals too ill to provide for themselves or their families. Over time, the organization has also been able to offer job training skills for people who may enter into the foodservice industry.
Their work is done by a small professional staff and thousands of volunteers.

The New England Center for Homeless Veterans was founded as a way to offer emergency lodging and shelter assistance to homeless men who had served in the armed forces. Today it has expanded to include psychological counseling, job training, and other social services for both male and female veterans. Much of the hospitality comes from volunteers and donors.

**Conclusion**

Hospitality is certainly a business, but it is also a calling. Hospitality is often a duty, but sometimes it is nothing more than offering a hand to help the person beside us. For thousands of years, *philoxenia* has been recognized as the best that humanity has to offer.

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Buffet-Américain

Peter Szende

The Great Exhibition of the Works of Industry of all Nations – also known variably as the Great Exhibition, the Crystal Palace Exhibition, or the World’s Fair – occurred in London during 1851. This established the standard for industrial and cultural exhibitions throughout Europe and the United States during the next century. It also inspired Napoleon III to organize his Exposition Universelle des produits de l'Agriculture, de l'Industrie, et des Beaux-Arts de Paris (translated as Universal Exhibition of Products of Agriculture, Industry, and Fine Arts of Paris) in 1855.

The Paris Exhibition was a catalyst for the creation of numerous related exhibits, attractions, and businesses in the neighborhoods surrounding the exhibition grounds along the Champs-Elysées. One of these was an innovative restaurant concept portrayed in the vintage advertising poster that is reproduced on a following page. The restaurant does not have a single name in the modern sense, but rather is identified by its style of service and its location.

A buffet-Américain (American buffet) was a place where one could eat or drink while standing. The phrase referred to the growing popularity of impromptu snacking in nineteenth century America, and represented a cross-cultural dining fad that complemented the themes of the Exposition Universelle.

This particular establishment resembled an integration of two concepts that are familiar today, a fast-casual bakery café and an Italian enoteca (wine
BUFFET-AMÉRICAIN
MAISON DU
LINGOT D'OR
BOULEVARD MONTMARTRE 10.
PASSAGE JOUFFROY 2, 4, 6.

VIANDES FROIDES PATISSERIE
Vins fins Français et Etrangers à la Bouteille et au Verre.
bar) with standing counters. The text at the bottom of the poster reads “VIANDES FROIDES PATIS-SERIE” (cold meats and pastries) and “Vins fins Français et Etrangers à la Bouteille et au Verre” (fine wines from France and abroad by the bottle and the glass). The food aspects targeted passersby and a neighborhood business crowd by offering gourmet “sandwiches with ham, poultry wings, and galantine placed between two slices of tender bread slices” (Villemot, 1858). The beverage aspects appealed to the popular urban trend of people socializing over a large selection of wines and other alcoholic beverages by the glass. One observer noted that the place served premium Allsopp beer “either bottled or on draught” (Sala, 1882).

This restaurant was located in the “MAISON DU LINGOT D’OR” (home of the gold ingot) in the Passage Jouffroy, which was a fashionable shopping arcade along the Boulevard Montmartre. The space had previously served as headquarters for a government lottery, which awarded a gold bar valued at more than 400,000 francs.

The poster was created in the workshop of Jean Alexis Rouchon, who is regarded as a pioneer in commercial graphic design in France. He is particularly known for advertising posters of this type, several of which are included in the collection of the Bibliothèque nationale de France (National Library of France or BnF).

Although this buffet-Américain attracted some attention, the business eventually disappeared from the Paris restaurant scene. This Rouchon poster exemplifies commercial art of the era, and also provides a glimpse of a short-lived dining concept that was ahead of its time.

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Information for Readers

Approach

Boston Hospitality Review is an interdisciplinary journal devoted to scholarship and reflection about the theory and practice of hospitality as a business activity and cultural phenomenon. It is published for the benefit of academics, industry practitioners, and the interested public by the School of Hospitality Administration at Boston University.

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