

This study is brought to you courtesy of

thinkinsights
with Google™

www.google.com/think/insights



The Traveler's Road to Decisions: Hotels

Google/OTX
U.S., July 2009

Research Methodology

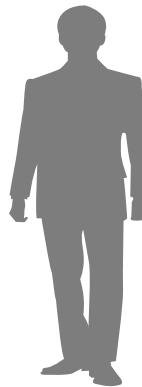
- Category covered: Hotel
- Survey of 2,929 consumers who have traveled at least once for personal/business purposes in the past six months
- An augment of 810 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/10 – 4/27

TRAVELER TYPES DEFINED



=

Personal Traveler
has taken at least one trip for leisure in the past 6 months



=

Business Traveler
has taken at least one trip for business in the past 6 months



=

Affluent Traveler
has taken at least one trip for leisure in the past 6 months and has a household income of \$150K+

thinktravel

with **Google**™

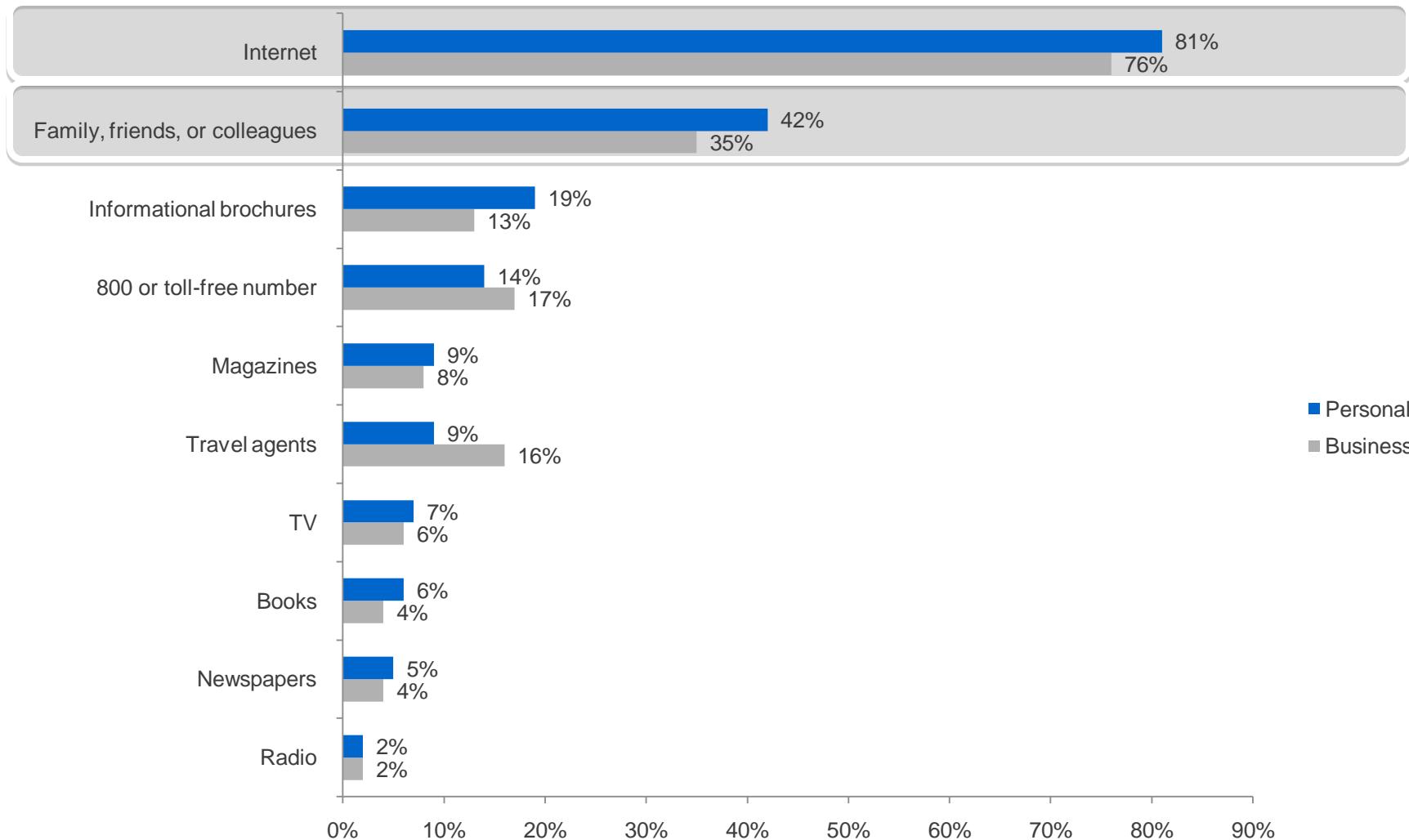
Source: Google & OTX, The Traveler's Road to Decision; June 2009

Google Confidential and Proprietary

Key Findings

- 1 The Internet is the most widely used source for making hotel choices
- 2 Google is used to comparison shop by almost one third of business and personal car renters and one in four affluent renters
- 3 Hotel supplier websites are the primary place where actual booking are made
- 4 Price, past experience and location are the most important factors when choosing a hotel

The Internet is Dominant Source for Choose a Hotel for All Travelers



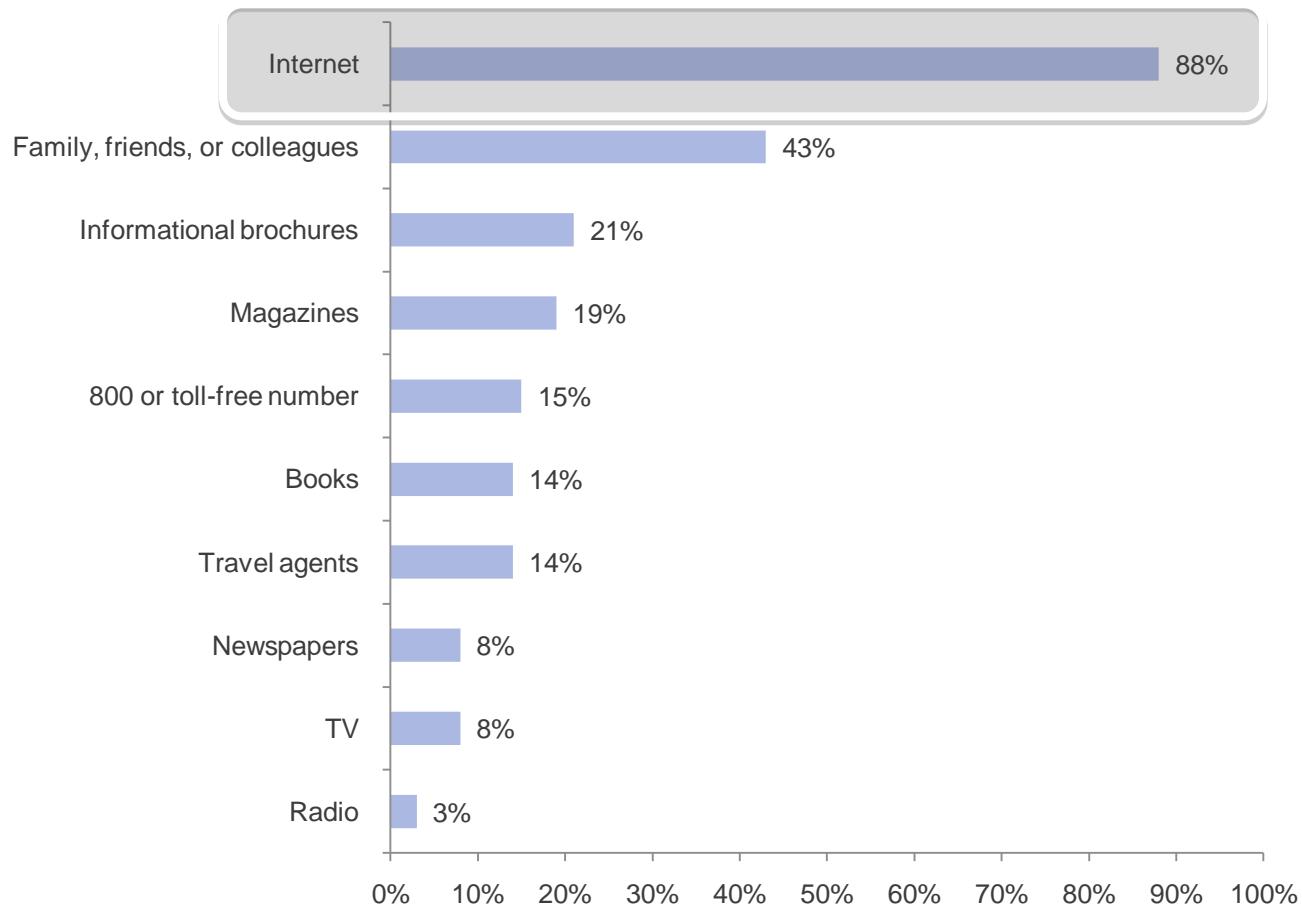
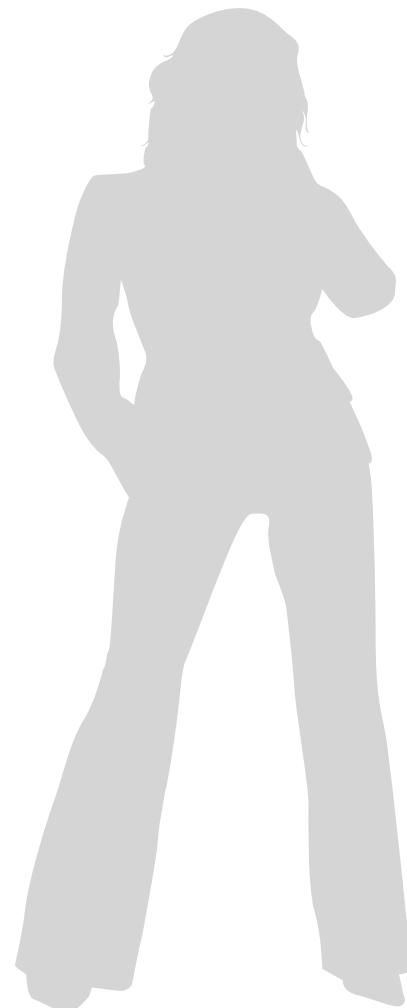
thinktravel
with Google™

Source: Google & OTX, The Traveler's Road to Decision, June 2009

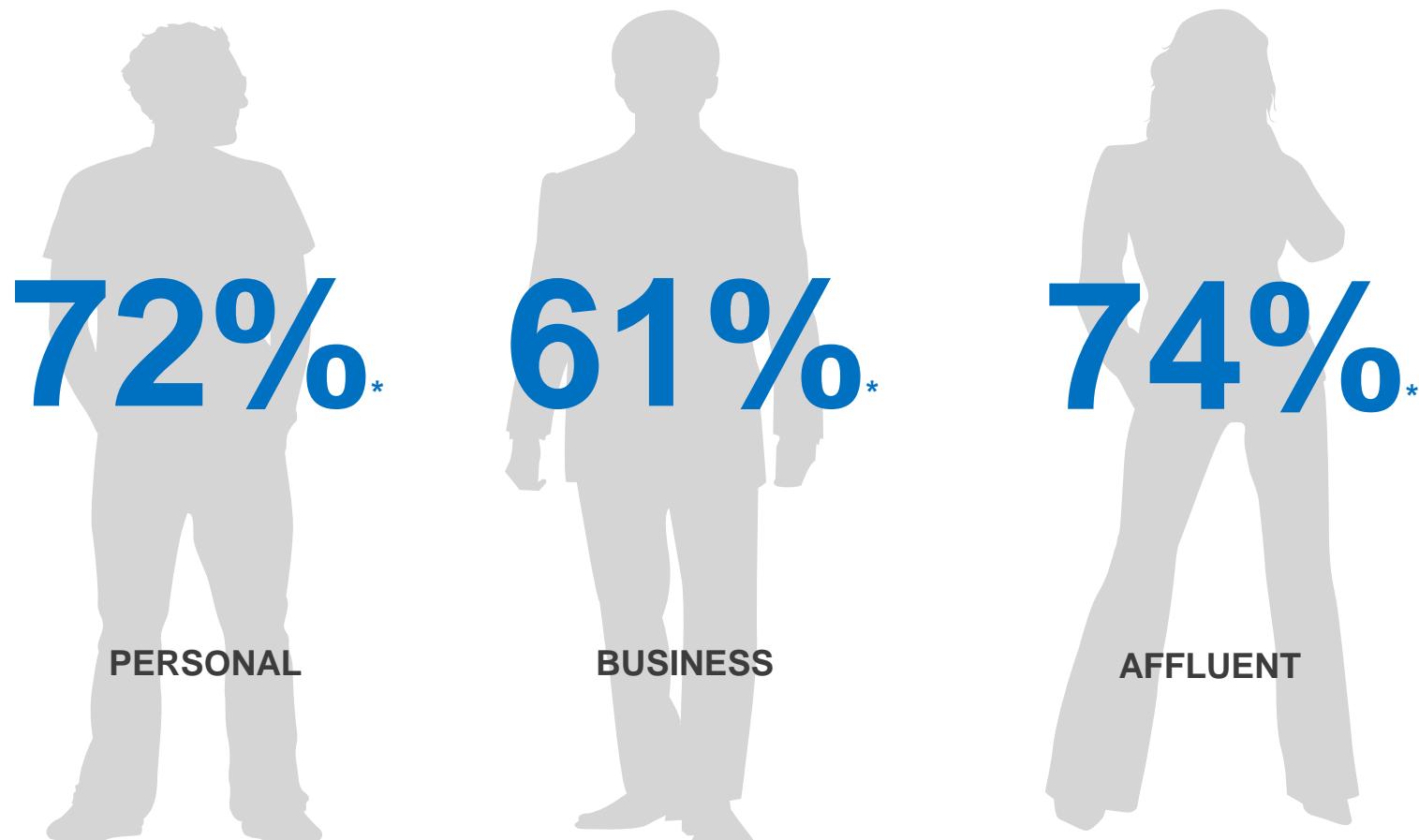
(QR1) Which of the following sources, if any, do you typically use to decide which lodging accommodations to use when taking a personal/business trip? (n= 1451 Personal; n= 668 Business)

Google Confidential and Proprietary

Affluents are Even More Likely to Use the Internet to Help Them Make a Decision

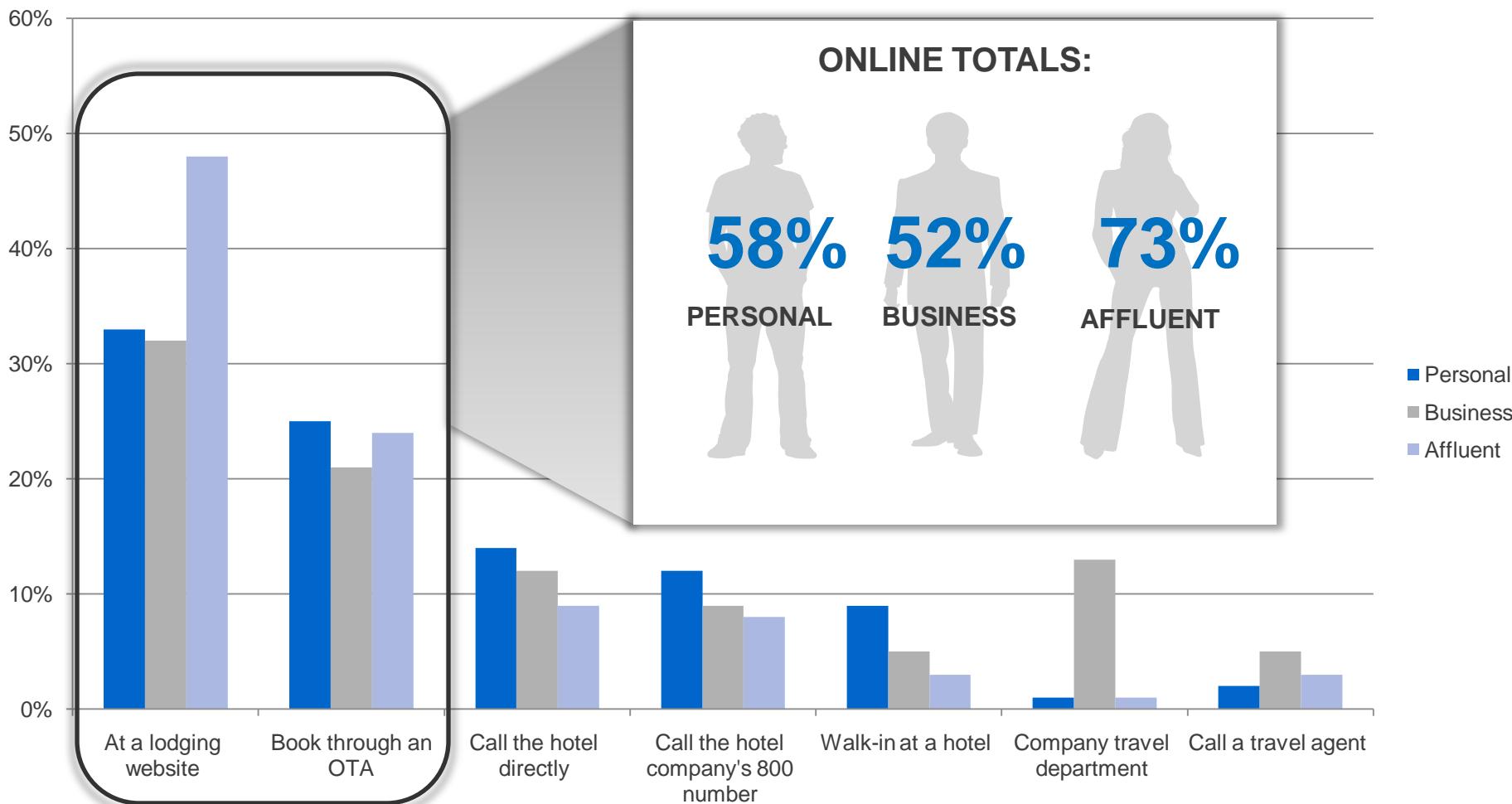


The Majority of Consumers Go Online to Comparison Shop Before Booking



Surprisingly, Affluents are the Most Likely Segment to Comparison Shop Online Before they Book

When it Comes to Booking, Online is the Preferred Method Across All Segments

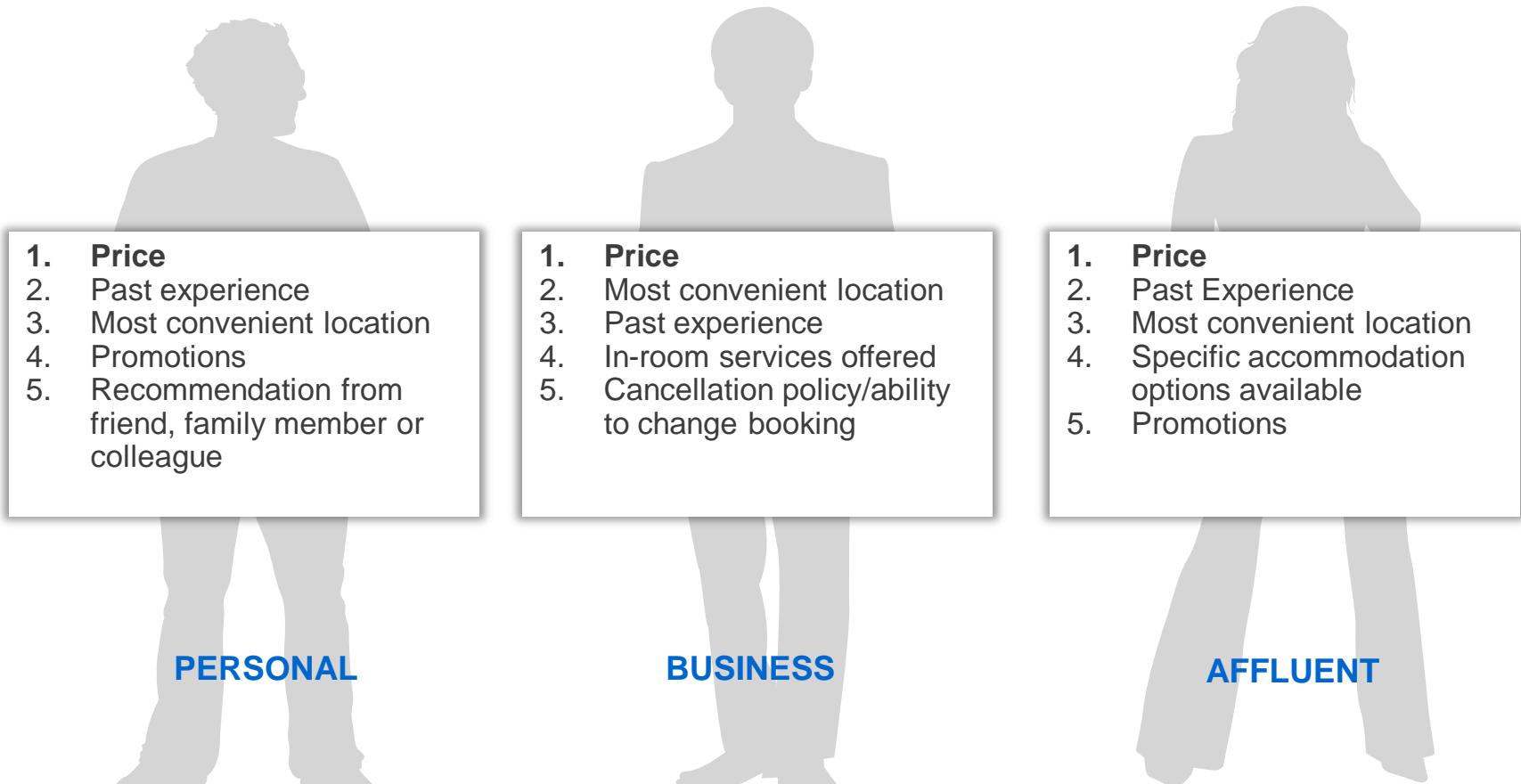


thinktravel
with Google™

(QH2) How do you typically reserve lodging accommodations when traveling overnight for a personal trip? (n= 1451 Personal; n= 668 Business, n = 810 Affluent.)

Google Confidential and Proprietary

What's the Most Important Factor When Choosing Where to Stay?



All segments value Price, Location, Past Experience, and Promotions, but importance varies.

How Do the Segments Differ Overall?

PERSONAL

BUSINESS

AFFLUENT

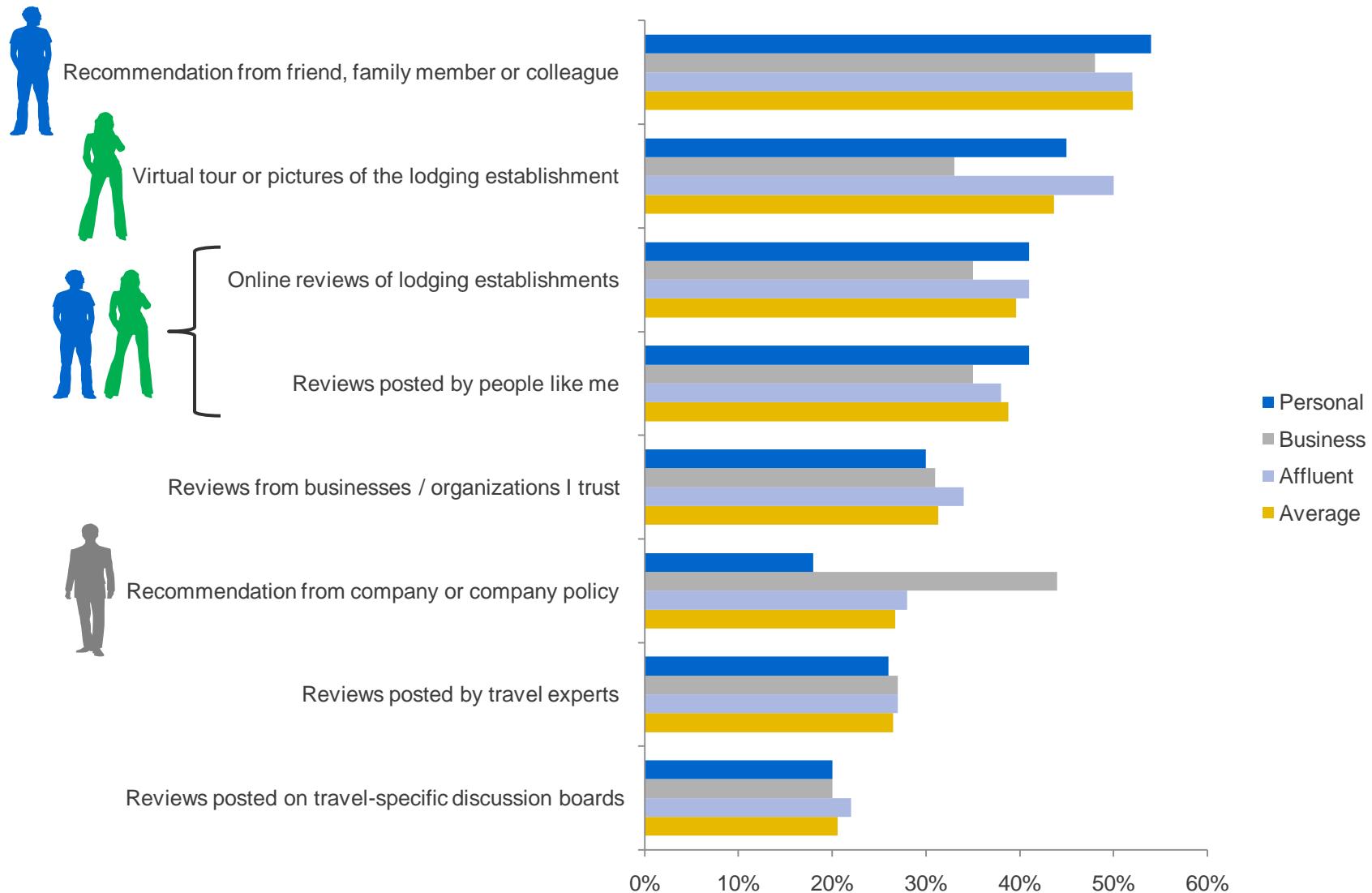
	Segment Average	Pers. Δ
Cancelation policy/ Ability to change booking	50%	11%
Price	86%	4%
Promotions	58%	3%
Reviews posted by people like me	39%	2%
Includes all-inclusive amenities	40%	2%
Recommendation from friend, family member or colleague	52%	2%

	Segment Average	Biz Δ
Recommendation from company or company policy	27%	17%
Close to airport location	23%	11%
Travel agent or company travel department recommendation	21%	9%
Can earn rewards points / miles	38%	7%
In-room services offered	54%	5%
Most convenient location	76%	3%

	Segment Average	Aff. Δ
Can earn rewards points / miles	38%	8%
Specific accommodation options available	55%	7%
Virtual tour or pictures of the lodging establishment	44%	6%
Past experience with lodging establishment	77%	3%
Reviews from businesses / organizations I trust	31%	3%
Reviews posted on travel-specific discussion boards	21%	1%

Recommendations are important for all segments, but the source of those reviews differs. Personal travelers trust each other, Business travelers trust their company, and Affluent travelers trust professional content.

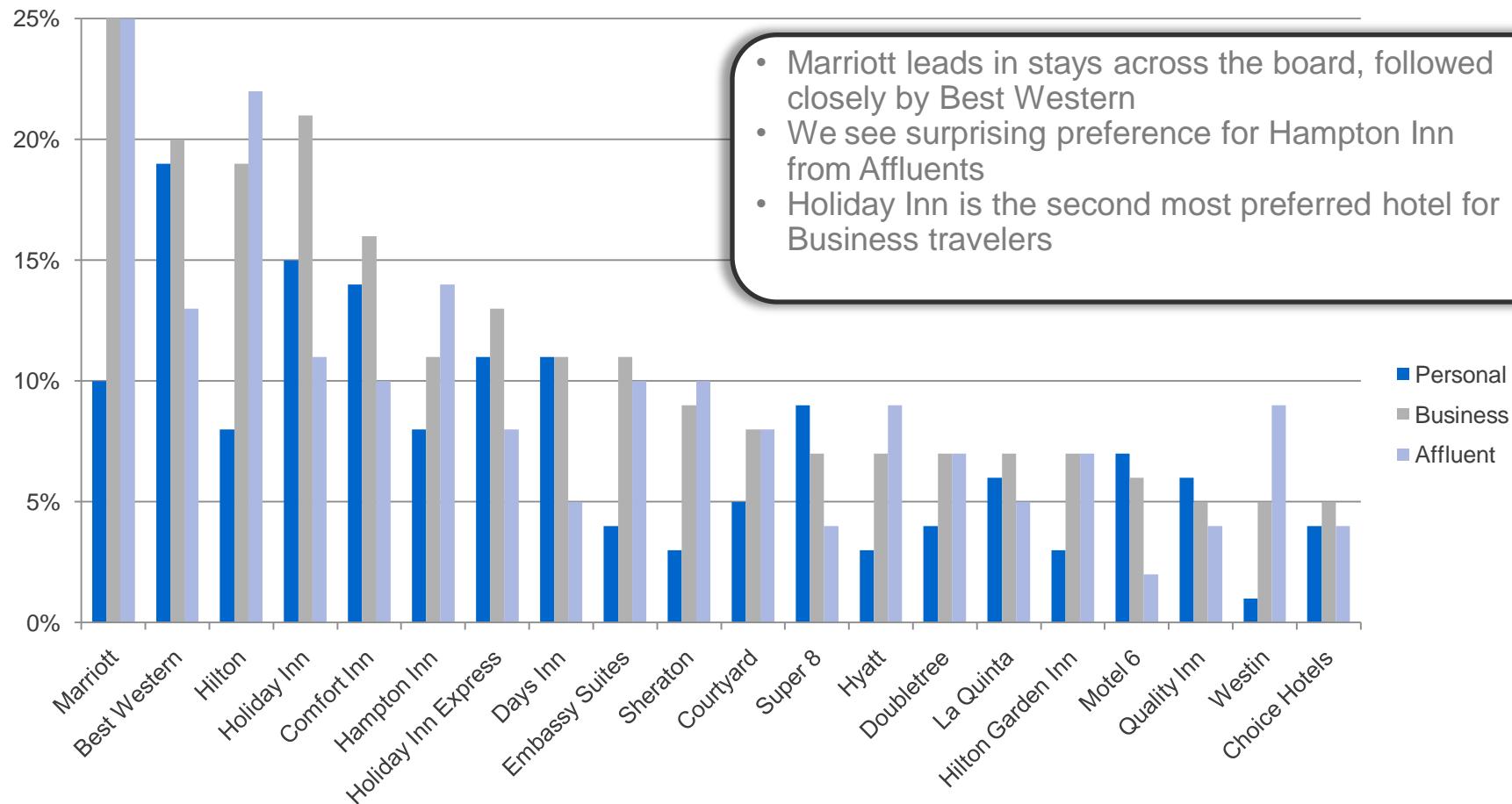
How Do Reviews Affect The Different Segments?



Business and Affluent Travelers Choose Similar Brands, While Personal Travelers are More Economical

Stayed with in the past 6 months

(Top 2 Box, Top 20 Responses)

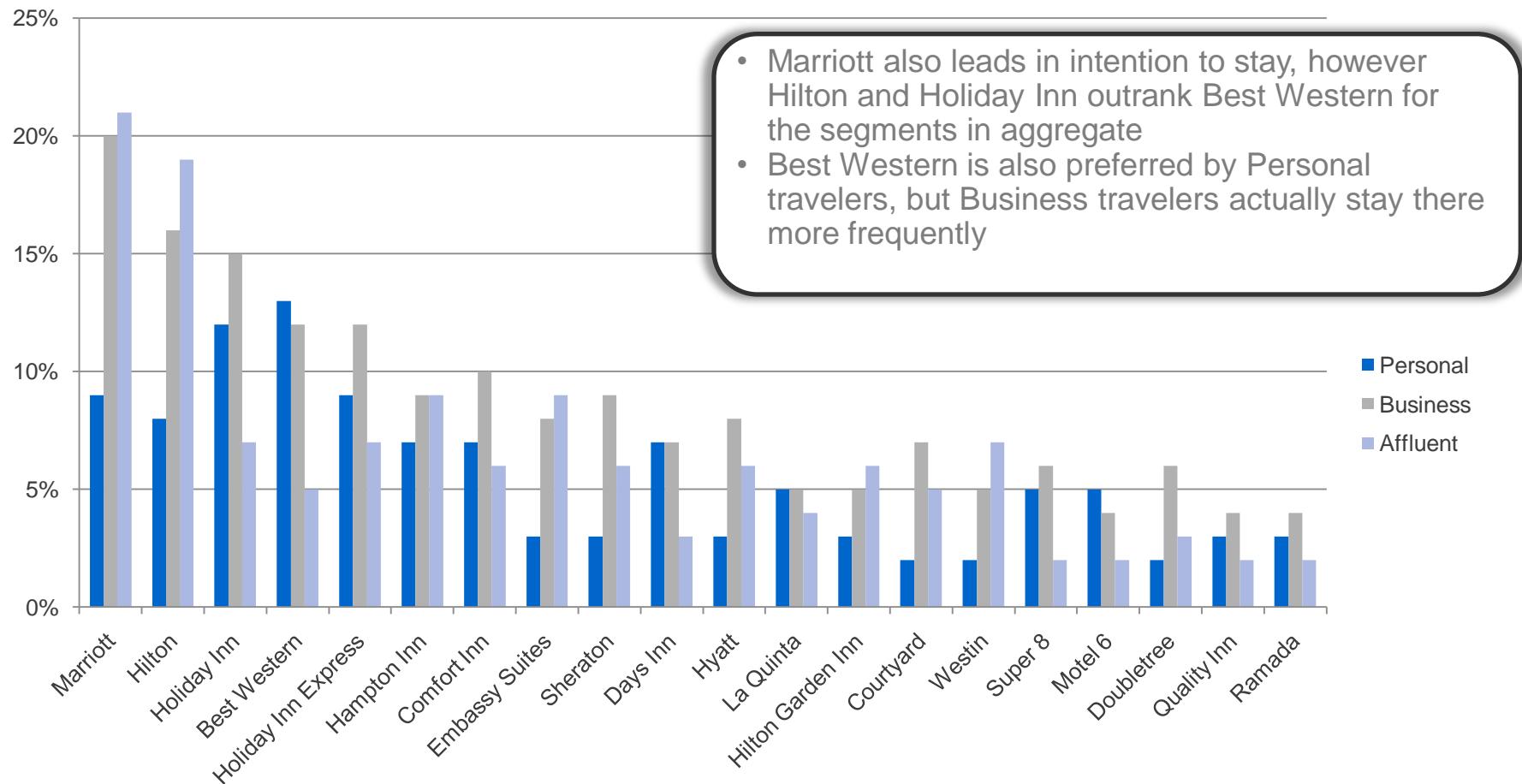


(QH5) In which of the following hotels have you stayed overnight in the past 6 months for personal/business reasons? (QH6) In which of the following hotels, if any, do you plan to stay overnight in the next 6 months for personal/business reasons? (n= 1451 Personal; n= 668 Business n = 810 Affluent.)

Business and Affluent Travelers Plan to Trade Up

Intend to stay with in the next 6 months

(Top 2 Box, Top 20 Responses)



(QH5) In which of the following hotels have you stayed overnight in the past 6 months for personal/business reasons?
(QH6) In which of the following hotels, if any, do you plan to stay overnight in the next 6 months for personal/business reasons?

(n= 1451 Personal; n= 668 Business n = 810 Affluent.)

Like what you learned?
Find more studies and data at

thinkinsights
with Google™

www.google.com/think/insights