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2010 Hotel Traveler's Road to Decision

The Role of Digital on Hotel Travelers

Google/OTX

U.S., September 2010

Research Methodology

- Category Covered: Hotel
- Survey of 5,000 travelers
- An augment of 1,500 affluent personal travelers was also recruited
- Partnered with OTX; interviews conducted 4/21/10 – 5/07/10

Traveler Types Defined



Key Findings

- 1 The Internet continues to be the most widely used source for Hotel research and booking.

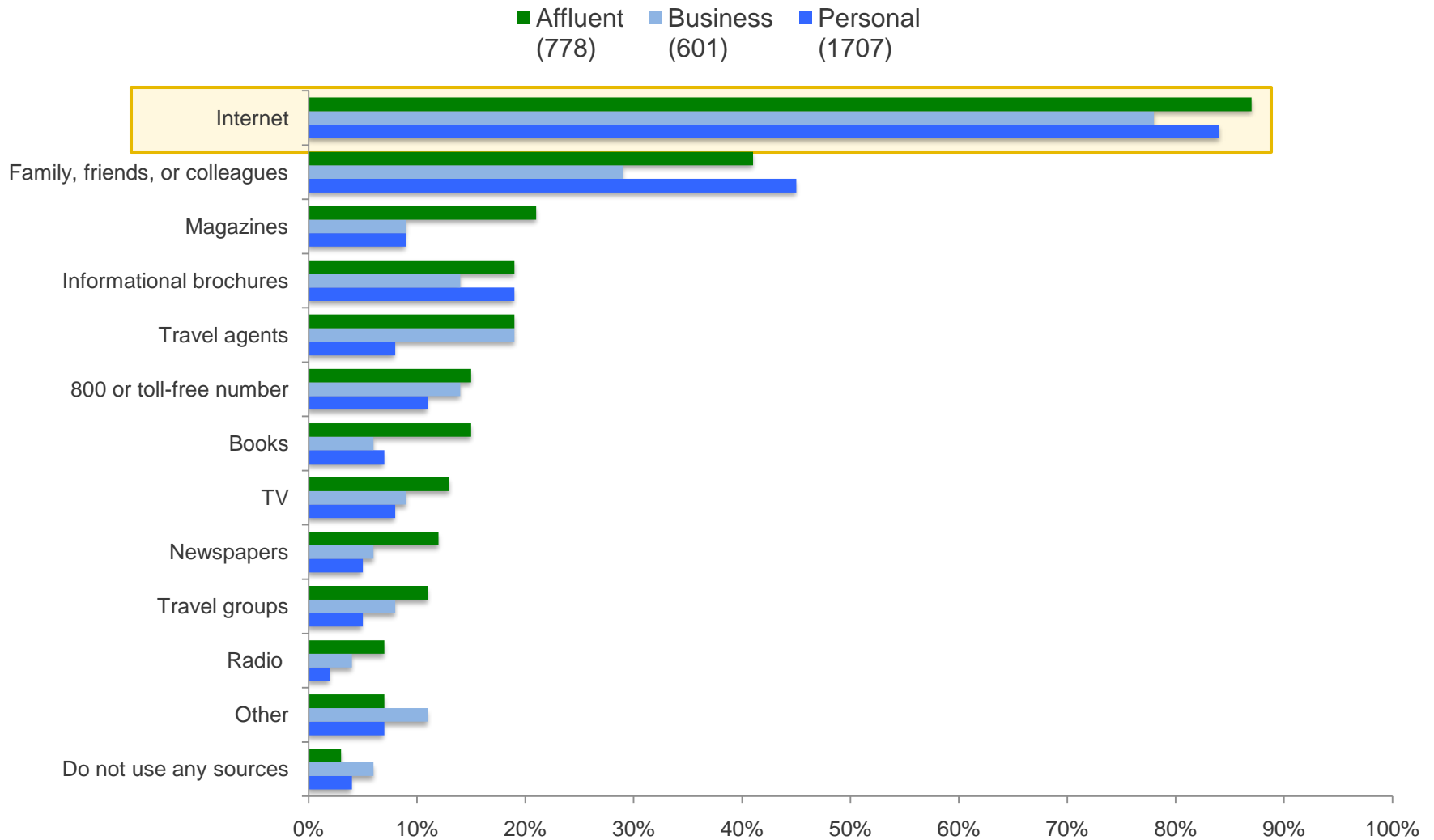
- 2 Travelers are actively comparison shopping – primarily through OTAs and Search Engines.

- 3 Price (leisure traveler), Location (business traveler) and Previous Experience (affluent traveler) are deciding factors in picking a hotel.

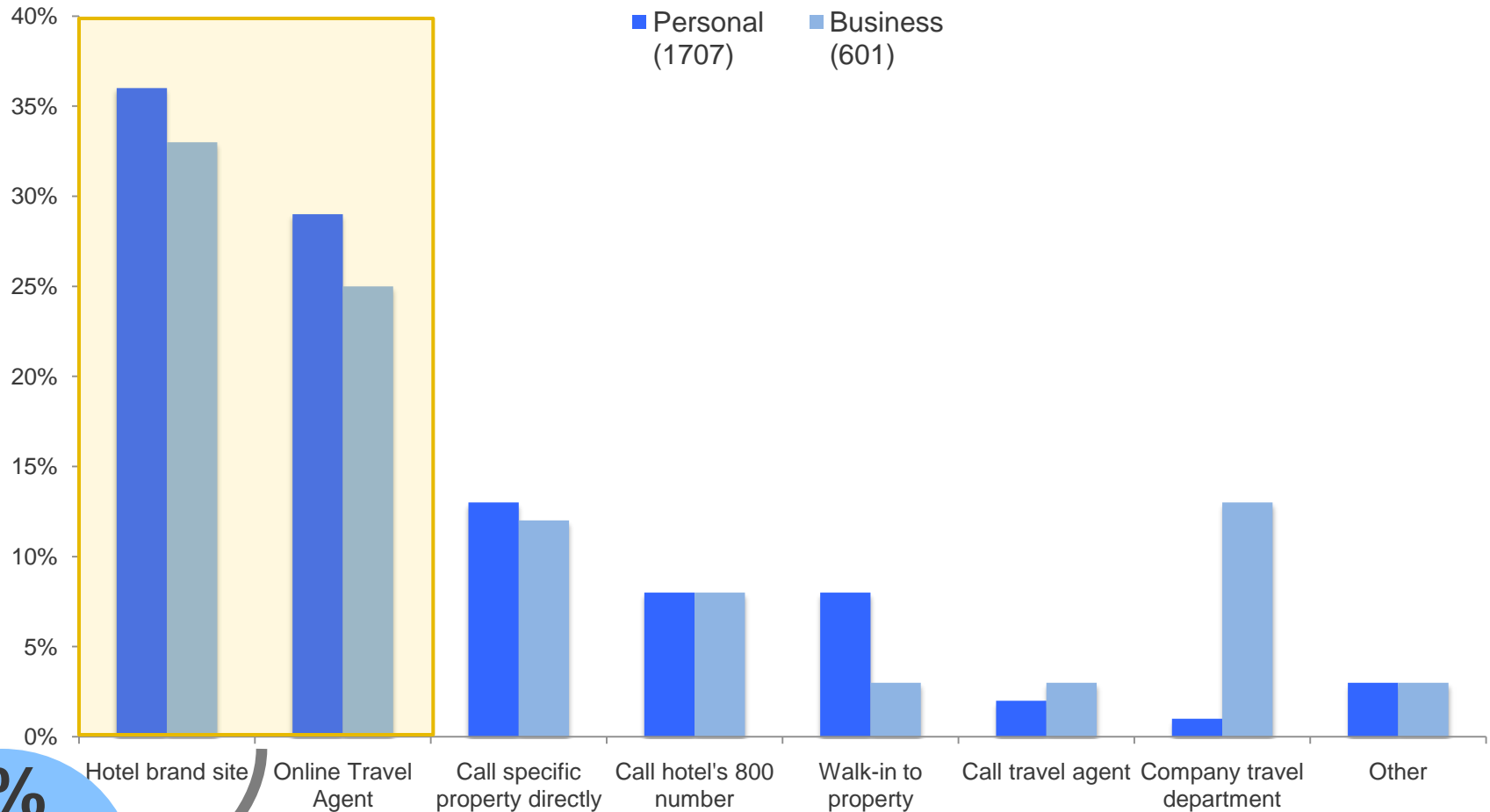
- 4 Business travelers are twice as likely as leisure travelers to stay at upscale properties.

- 5 Best Western and Holiday Inn are popular among vacationers, while business and affluent travelers prefer Marriott and Hilton.

The Internet is the top source for hotel research



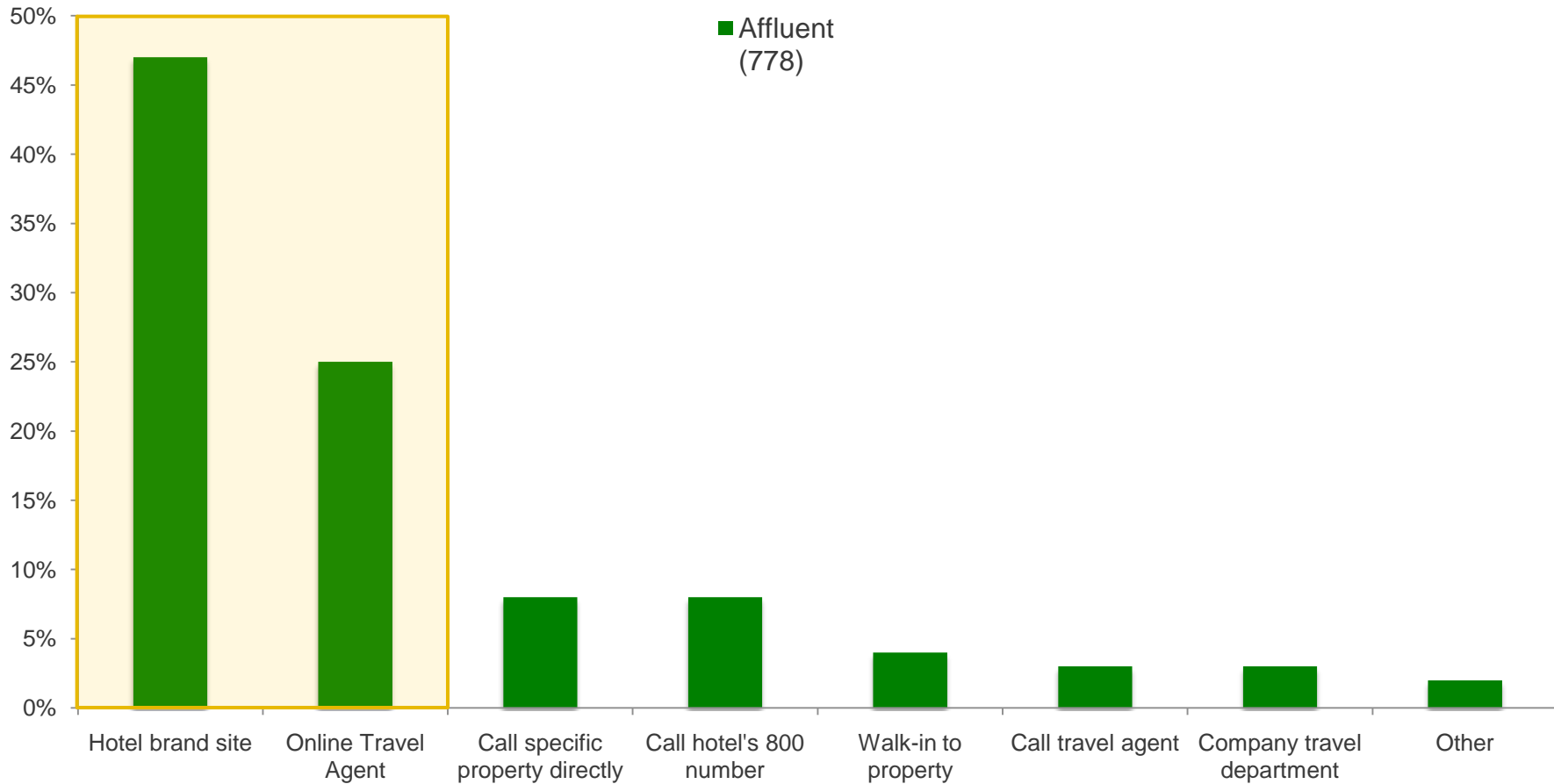
Travelers are increasingly booking online



6%
more book
online
compared
to 2009.

Ensure your booking engine is accessible,
and that it is easy for consumers to book their hotel stay.

Nearly 3 in 4 affluents book hotels online



Ensure your booking engine is accessible, and that it is easy for consumers to book their hotel stay.

Personal travelers actively comparison shop...



97%

**Some extent
every time**



72%

Always / Frequently

...when researching their hotels.

Strong representation on generic terms paired with a remarketing strategy ensures your brand is top-of-mind during the research process.

Affluent travelers actively comparison shop...



98%

**Some extent
every time**



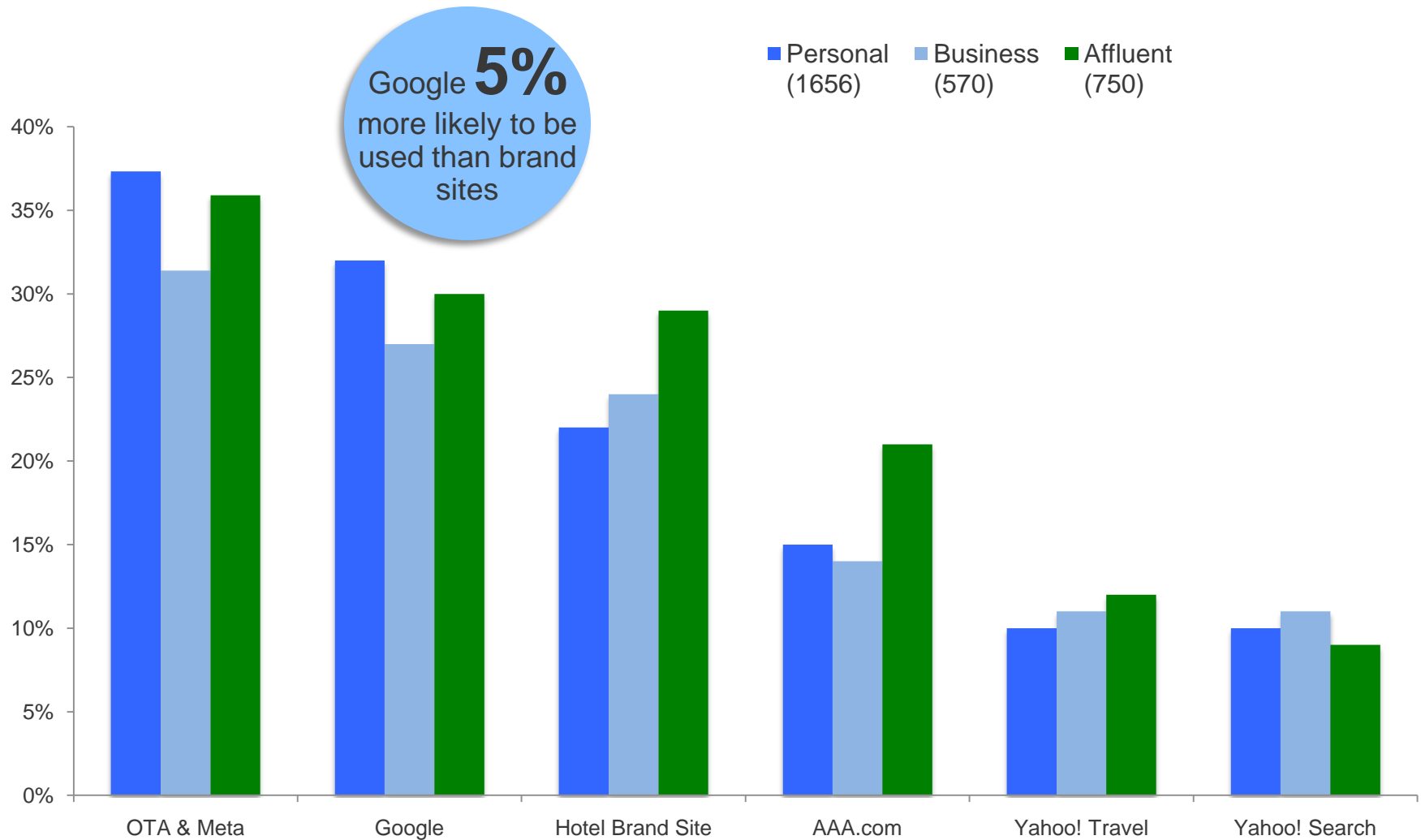
75%

Always / Frequently

...when researching their hotels.

Strong representation on generic terms paired with a remarketing strategy ensures your brand is top-of-mind during the research process.

Google 2nd only to OTAs when comparing hotels

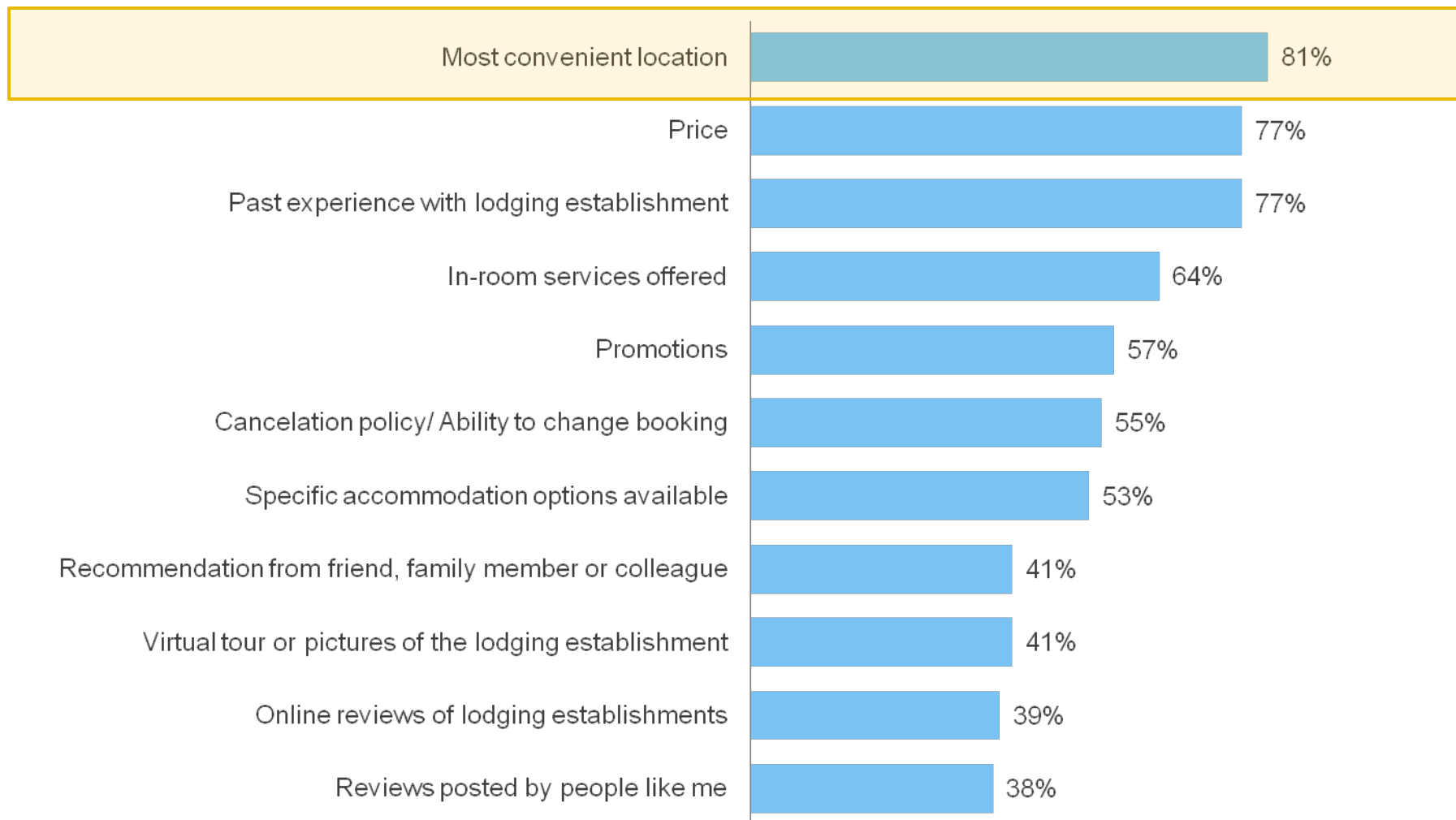


Leisure travelers choose hotels based on price



Special offers and attractive price points in ads drive bookings.

For business trips, location is a deciding factor



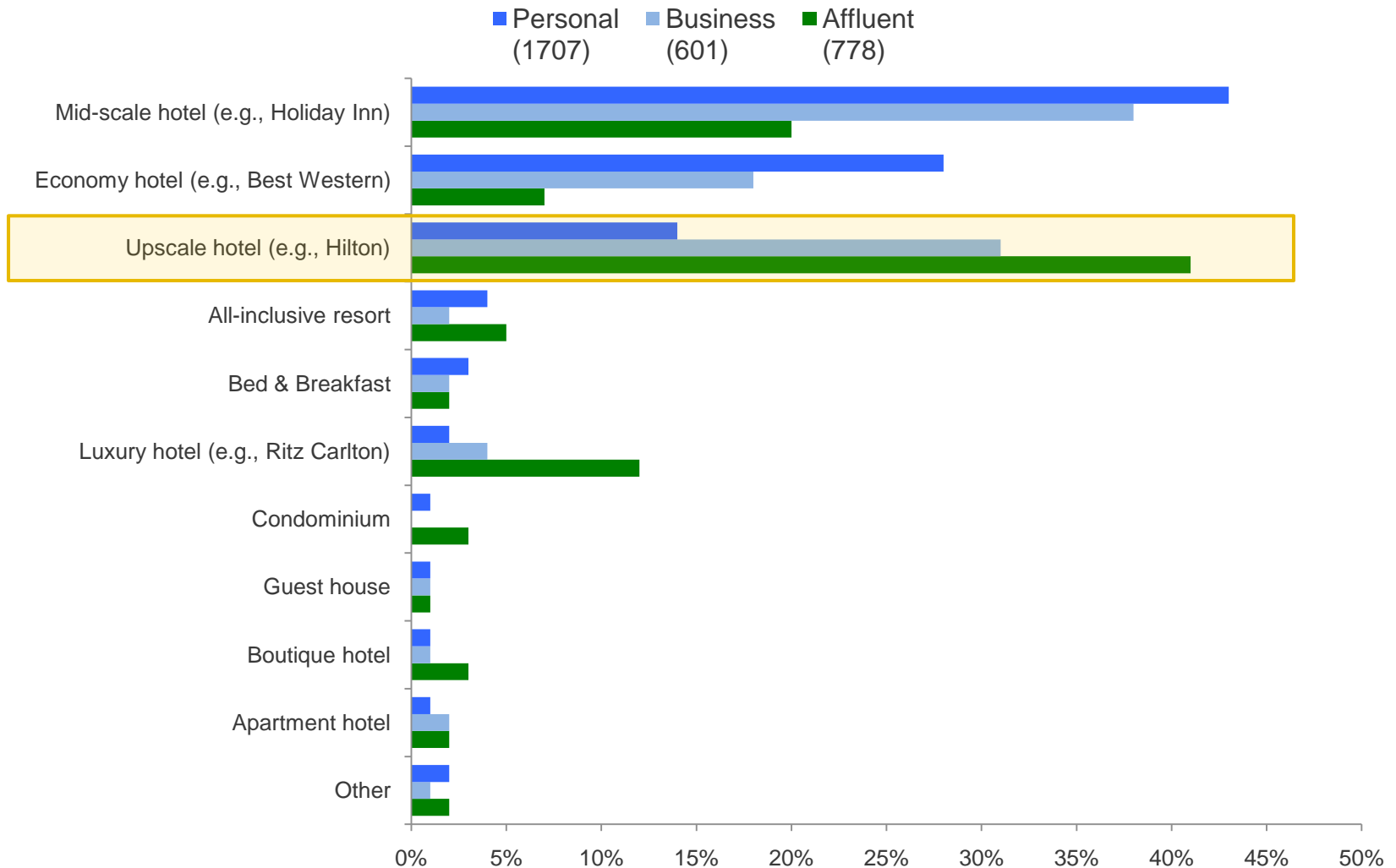
Location Extensions on Google Maps highlight proximity to destinations.

Affluents also consider past hotel experiences



Remind them why they loved their last stay with compelling display ads.


Business travelers stayed at upscale hotels twice as much as leisure travelers



The hotel space is highly fragmented

Hotel	Personal	Business	Affluent
Best Western	16%	24%	13%
Holiday Inn	15%	20%	-
Marriott	13%	32%	27%
Comfort Inn	13%	21%	-
Holiday Inn Express	12%	20%	10%
Hilton	9%	27%	26%
Hampton Inn	9%	19%	12%
Courtyard	5%	17%	10%
Embassy Suites	4%	17%	12%
Hilton Garden Inn	4%	14%	11%
Hyatt	3%	14%	12%
Sheraton	3%	11%	11%
Days Inn	9%	10%	-
Choice Hotels	3%	10%	-
Westin	2%	10%	11%
Ritz-Carlton	-	-	10%

Branding campaigns can help capture your desired consumer segment

Top 3 per segment 

Data into Action: Marketing Opportunities

- 1 Make it is convenient for consumers to reserve their hotel stay with a simple, easily accessible booking engine.
- 2 Ensure your brand is top-of-mind while travelers comparison shop: be prepared with coverage on generic terms and a tailored remarketing strategy.
- 3 Attract vacationers with creative that highlights special offers and attractive price points.
- 4 Show business travelers that you are centrally located with a presence on Maps and Local content.
- 5 Remind the affluent audience why they loved your property with compelling display ads.
- 6 Stand out in the crowded hotel market with branding campaigns focused on capturing your desired consumer segment.

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