2017
TRAVEL WEBSITE BEHAVIOR STUDY

KNOW YOUR GUEST

Improve your website by finding out who's visiting, how they got there & what they want!

Brought to you by Fuel & Flip.to

Now's the time to do the research and invest in your hotel's website.

Your hotel's website is, perhaps, the most important factor in a successful hotel marketing campaign. It is the mousetrap to which the majority of a hotel's marketing spend is targeted. If your website is ineffective, your entire marketing budget will be spent for nothing.
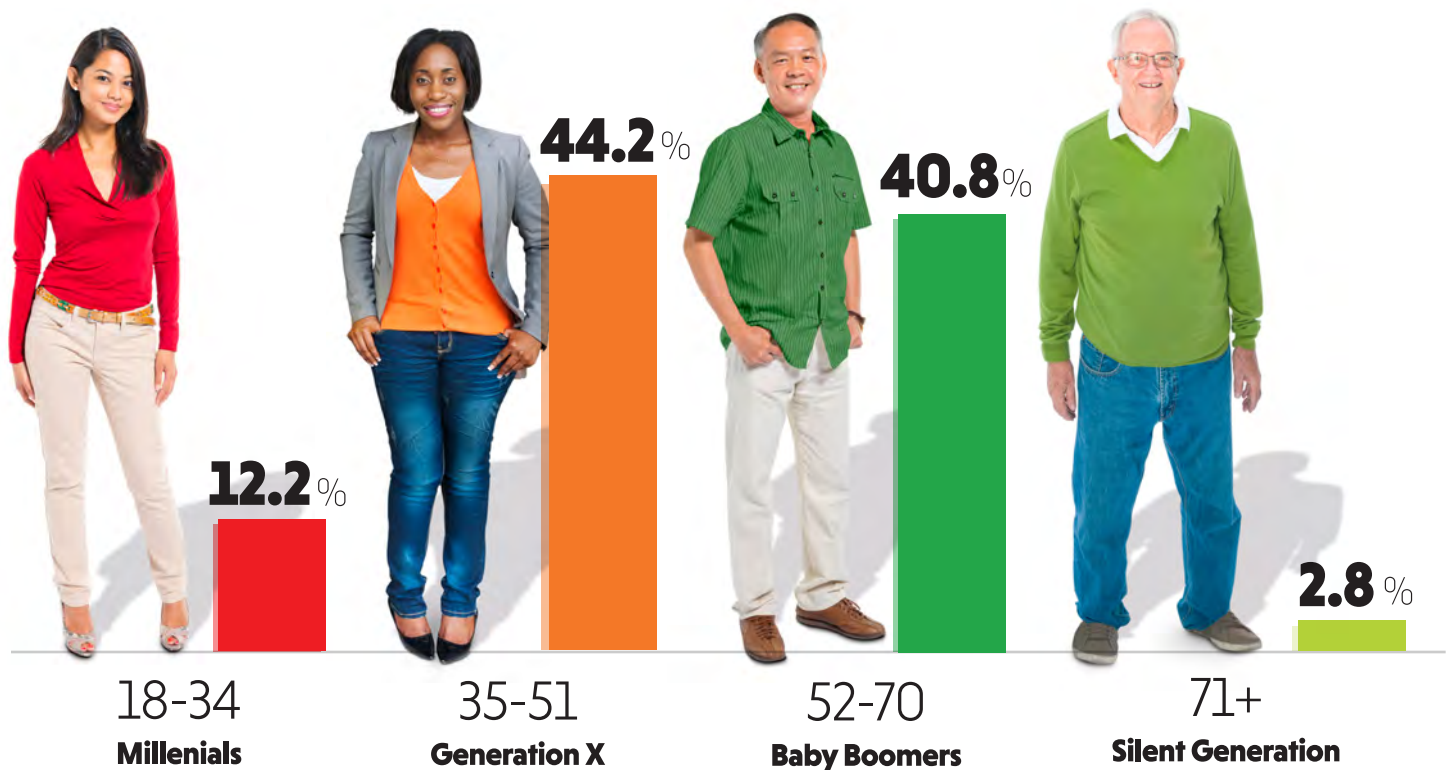
Fuel and **Flip.to** set out to find out exactly which elements and functionality make a good website.

This study shows the results of extensive research to better understand the behavior and demands of leisure travelers when researching and booking a hotel. The results are compiled from more than 2,300 respondents, all of whom planned and consumed at least one leisure vacation in the past 12 months.

In this report, we'll reveal our insights and offer advice on how to leverage this information to improve your website performance. We welcome any feedback or inquiries related to this study. For more information, or to download this study, please visit **www.fueltravel.com/websitestudy/**

Here's how our 2017 leisure travel behavior study participants stacked up:

BY AGE

12.2%
18-34
Millenials

44.2%
35-51
Generation X

40.8%
52-70
Baby Boomers

2.8%
71+
**Silent Generation**

BY GENDER

female **76.5**%   male **23.5**%

How many sites does it take to book a hotel?

The number of websites that a consumer visits continues to decrease for the majority of people.

Our survey reveals that 86% of leisure travelers visit nine websites or fewer prior to booking.

The average number of unique websites visited by leisure travelers is 4.4. This is down from 4.6 only a year ago.

4.4

Average number of unique sites visited prior to booking
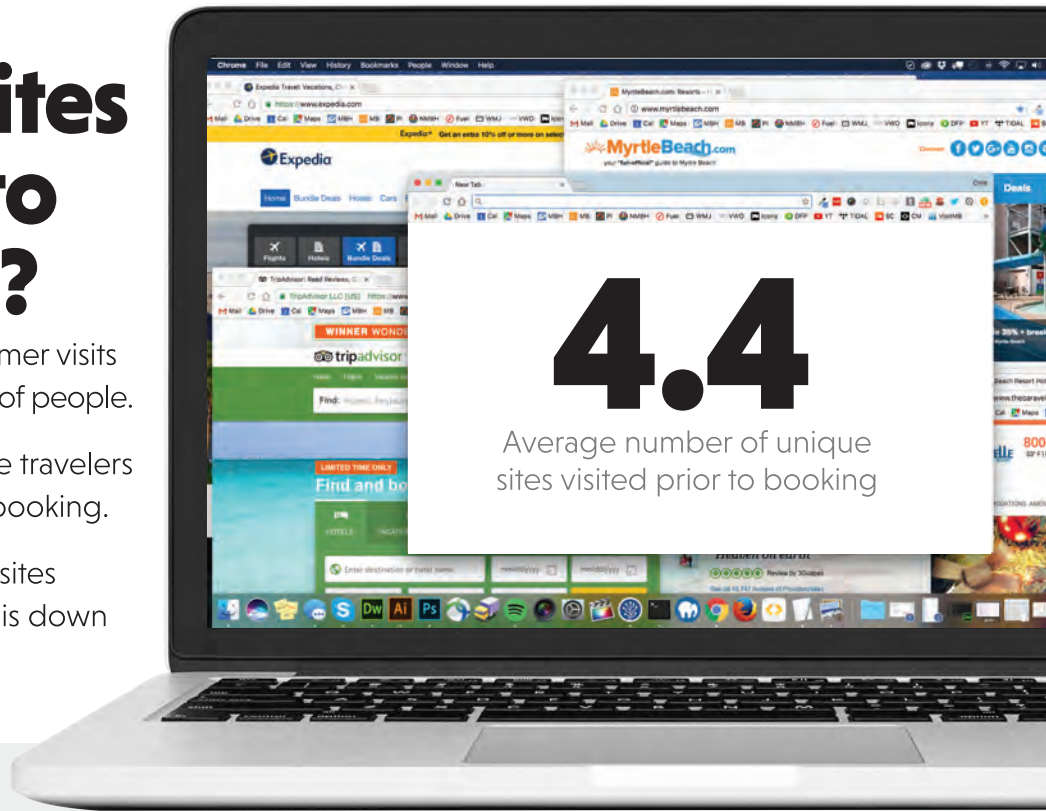
4.6

Average number of unique sites visited prior to booking by travelers age 18-34

Millennial Analysis

The data for Millenials is similar to the overall numbers with an average of 4.6 unique websites visited prior to booking.

Key Insights

▶ **Travelers don't want to search and search ... but they will.** We see a lot of travelers using between one and five sites to book, then it tapers off and soars again at 10+. This indicates that if you inspire them at the beginning, they won't feel like they have to keep searching. If you don't, it's a miss — and off they go again searching.

▶ **Search visibilty is key.** Given that most consumers only visit a small selection of websites, this underscores the importance of being visible in search so that your property does not get overlooked during the consideration phase.

▶ **You only have one shot to impress; don't blow it.** If you do get an opportunity to be one of the sites within the consumer's selection set, make sure to have a website experience that delivers.

Which sources are most influential?

Given that your property is being compared to your competition, it's important to understand the criteria by which you are being compared and which criteria are most influential in the decision-making process.

We asked the respondents to rank the influencing factors, and the overwhelming No. 1 influencing factor was the hotel website. **Here's how travelers ranked their top influencing factors:**

1. Hotel website
Direct visit to accommodations provider

2. Word of mouth
Recommendations from friends or family

3. Online travel site
Expedia, Orbitz, Priceline, etc.

4. Search engine
Google, Bing, Yahoo!, etc.

5. Review site
TripAdvisor, Yelp, etc.

6. Metasearch site
Kayak, Trivago, etc.

Millennial Analysis

The top 6 responses were identical for Millennials and the other generations; however, the gap between the hotel website and word of mouth was much smaller for Millennials.

Key Insights

▶ **Incorporate word of mouth in your efforts.** Because direct web visits and recommendations are the top influencers to learn about a hotel, hotels should tie these two factors together. Have a superior website experience that leverages the experiences of happy guests.

▶ **User-generated content can be powerful.** The inclusion of guest reviews, guest photos and guest testimonial videos within the hotel's website could help increase conversion rate.

How long does it take?

When asked, "How many times do you typically visit a hotel website before making a booking?" consumers indicated they are making their decision carefully. The average number of visits to a hotel website before making a booking was 3.4.

Perhaps, more important, when asked, "When visiting a hotel's website for the first time, how many seconds does it take for you to form an opinion about the property?" the average response was 15.9 seconds.

Consumers are looking beyond the superficial aesthetics of the website and taking time to actually digest the messaging and the photography.

In addition, we see that potential guests are visiting a hotel's website for an average total of 29.8 minutes before making their reservation, clearly indicating that they are doing their homework.

3.4
Average number of visits to a hotel website before making a booking

🔑 Key Insights

▶ **You have limited time to grab a guest's attention.** They are bouncing between your site and other sites. If you don't grab them on the first few visits, they are booking somewhere else.

▶ **Personalization is important.** There is huge potential for gaining a competitive advantage by customizing and personalizing the content for folks coming back the second or third time.

▶ **For many visitors, it's three and out.** There's a large drop-off after the third visit, so think of this when timing and targeting remarketing campaigns.

▶ **Consumers don't mind doing their homework.** On average, users are visiting for nearly 30 minutes total. This is a strong indicator they are willing to explore the hotel website for more than just basic hotel information.

▶ **Booking is a journey.** Each time a potential guest revisits your site, they are likely at a different point in the booking journey. Provide content that is relevant to their location in the booking process.

▶ **Pay attention to content.** It's not necessarily the time they are spending on your site; it's also what they are doing while they're there. Look closely at the content that is compelling them to leave or stay.

29.8
Average number of minutes spent on a hotel website before booking

Millennial Analysis

Millenials are slightly more thorough in researching their hotels. The average number of times they visited a site before booking was 4.4. Interestingly, they do so in a shorter amount of time, at 21.2 minutes.

What makes a hotel website good?

Consumers find both written content and photography useful in making a booking decision and these aspects along with the site's design all combine to create a website that not only gives a great first impression to visitors, but also provides them with the information and usability needed to plan their stay.

We asked respondents to rate which of the visual and written aspects of a site influenced them in the booking process. Here are some of the insights we found:

Visual Content

We were curious to see whether the overall design of the website was more or less influential than the quality of the photography on the website. While both aspects were very influential, slightly more people said that good photos helped influence them during booking.

87%
said photos influenced them during booking

77%
said site design influenced them during booking

Photography

In regards to the type of photography that matters, more than 79% of respondents said that user-generated photos influenced their decision.

Often the concern is that too many images slow down site speed and negatively impact user experience.

However, we found that the time it takes a site to load influences only 52% of visitors — meaning that great visuals trump speed.

Design

When it comes to the layout and functionality of the page itself, most respondents indicated that the quality of the website design influenced them.

In terms of what factors don't influence the decision, we found that aspects of the site that receive a lot of attention during the design process are less important than one may think.

The three least influential elements on our list were font, color scheme and logo.

Millennial Analysis

Visuals matter even more to Millennials than they do to other demographics. 87% of Millennials are influenced by the quality of the website design and a whopping 92% by the quality of the photography. There were no discernable differences about their preferences on written content.

Written Content

In surveying travelers about what types of written content matters to them, we discovered that the majority of guests want information about your property and the rooms during their initial research phase. They then move on to validating their decision through reviews and user-generated content.

Hotel info

Topping the list of written content was information pertaining to the hotel itself, including in-room amenities, property amenities, room descriptions and overall property description.

Reviews

User-generated content such as photos and reviews are also important. While people use property and room info to qualify the property as something in which they are interested, they then want to validate their decision by looking at reviews and testimonials or highlights of past guest experiences.

Local info

Additional information about your hotel and the surrounding area are also important to include. Area information, events and property history were rated as important by more than two-thirds of people surveyed.

95%
said property & room info was important

85%
said reviews were important

70%
said area information was important

Other factors

The question "Rate the importance of the following written elements on a hotel website on a scale of 1-5" received more write-in responses than any other question on the survey. The top write-in submissions centered on specific guest needs, including: pet-friendly information, disabled access, kids programs, etc.

Another popular write-in submission was more information about the cleanliness of rooms.

🔑 Key Insights

▶ **The visual appeal of a hotel website is paramount.** Photography is more important than the overall website design. You should always invest in great quality photography, including user-generated photos.

▶ **Guests want specifics.** Many guests are looking for information about their specific needs and require-ments. This would indicate that a site search could help guests find answers to their specific questions. It also makes a great case for the need for an FAQ section within your site.

The benefits of free breakfast & wi-fi

We have already established the importance of a great website experience, with great photography and lots of useful content, but what else can win over the hearts and minds of a potential guest?

We wanted to look at two specific offerings that have received a lot of coverage recently: free wi-fi and free breakfast.

It turns out that both of these offerings are important, with free wi-fi being the clear winner with 83.5% indicating that it was an important factor. Free breakfast also had some influence, with 64% indicating that it was an important factor.

83.5%

of respondents believe that
free wi-fi is important

64%

of respondents believe that
free breakfast is important

Millennial Analysis

Perhaps, unsurprisingly, 88% of Millennials indicated that free wi-fi was an important factor in making their decision. Interestingly, free breakfast was slightly less important, coming in at 57%.

Key Insights

▶ **Guests see wi-fi as a utility.** Free wi-fi is considered by the vast majority of guests to be an essential utility and should be in the same class of amenities as air conditioning, a bathroom, and a bed.

▶ **Free doesn't mean you can't make money.** There are still potential revenue streams for hotels that provide free basic wi-fi. You can charge for upgrades such as faster speeds for guests who have higher bandwidth demands.

▶ **Don't slow your guests down.** The base speed of wi-fi should be respectable for the most common tasks — email, light streaming, music, etc. Don't make the free version give your guests dial-up flashbacks.

Just how important is price?

Conventional wisdom is that price is the biggest influencing factor for the majority of potential hotel guests. We wanted to see how price compared to other factors, so we asked respondents to "Rank the following from most influential (top) to least influential (bottom) when making your booking decision".

The results confirmed our suspicion, with price being the top result, followed by location. This finding was further validated when asking "When visiting a hotel's website, which of the following pages do you visit first?" yielded rates & availability as the top response, followed by amenity and room information.

1. Price

2. Location

3. Room size & layout

4. Special offers

5. Amenities

6. Reviews & testimonials

Millennial Analysis

Millennials ranked property amenities above special offers and also had property location much closer to price. This could indicate that the overall experience is more of a priority to Millennials.

In addition, the rates were still the first thing that most Millennials looked at when visiting a site; however, room and amenity information as well as reviews/testimonials each scored 20%-25% higher with Millennials than with other respondents.

Key Insights

▶ **Focus on the experience.** With price being such an important factor, hotel room buying has become commodity driven. Perhaps, there is an opportunity for properties to stand out from the crowd by focusing on the experience.

▶ **Remember what price really means.** It's important to remember that price can mean two things: narrowing down a selection between one hotel and another OR staying within a traveler's budget in general. This also re-emphasizes the importance of rate parity between all of your distribution channels.

Why do people leave your site?

Getting a better understanding of why potential guests leave your site may be useful when prioritizing your content and developing the overall user experience.

We have often assumed that a guest who encounters an error when visiting the website would likely leave and go elsewhere. In reality, it turns out the potential guests may be more resilient than we had thought.

More than 85% indicated that they would either refresh the page or come back later as opposed to leaving and going to another hotel. It is still important to realize that 15% of your potential guests would leave and book elsewhere if they were to encounter an error. That is money you can protect by actively monitoring and testing your website.

Price

We asked "Which factors would cause you to leave a hotel website and book elsewhere?" Overwhelmingly, the majority of people indicated that either "prices too high" or "lack of availability for desired dates" were the top reasons.

Date availability

We also asked, "If the dates for which you searched were not available, would you consider alternative dates?" to which, 41% said that they would consider alternative dates.

Other influences

There were strong indications that factors including a lack of information regarding the rooms or the amenities, poor photography and poor reviews are problems for many visitors.

There were also some notable write-ins such as "I didn't like the look of the rooms" or "the hotel didn't look right for me" that indicate subjective opinion has a large influence.

85%

of respondents would not leave after experiencing an error on your website

Millennial Analysis

Even though more Millennials (62%) would be willing to refresh the page if they encountered an error, the total number who would choose another property remained the same. Millennials indicated that they have slightly less flexibility in their date selection. Only 39% indicated that they would consider alternative dates.

Key Insights

▶ **Hotel selection is price sensitive.** Consumers want to ensure a property fits their needs and their budget. Your website can sell them on the value and experience.

▶ **Travel dates become more fixed the later the guest is in the booking process**. Try to get in front of the guest early in the process and also try to offer them alternative dates whenever possible as their travel dates may be far more flexible earlier in the planning process.

Keeping guests from leaving

Understanding that every guest may have a set of unique requirements that may or may not be addressed within the website, we asked, "If you had a question during the booking process, what would you do?"

The results show that the consumer is definitely willing to dig to find the answer to their question. Many respondents indicated that they would try multiple avenues to solve their problem before giving up and going elsewhere. Here's a look at how the responses broke down:

16%
Use a search engine

38%
Live Chat on the property's website

76%
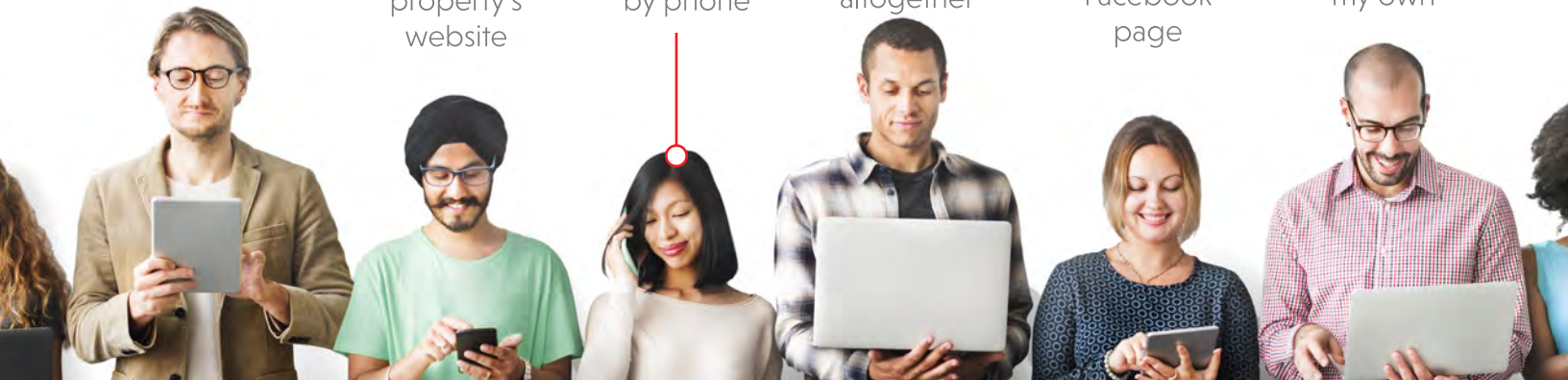Contact the property by phone

7%
Leave the website altogether

8%
Ask on property's Facebook page

27%
Try to find answer on my own

Millennial Analysis

Millennials indicated that they are also willing to find the answer to their questions in similar methods to other generations. We did see, however, a sizeable decrease in the number who would call the property and an increase in electronic methods such as live chat as well as social media and search engines.

Key Insights

▶ **Make it easy to get answers.** There is a clear indication that the property must make it easy for the guest to reach out to them. Ensure that your website has a clear method to be contacted, both by phone and via live chat.

▶ **Invest in creating content to answer their questions.** Guests want to find the answers to their questions and are willing to look for the answer rather than leaving the site. Make it easier on the guest to find the information they need. An FAQ page can serve as a catch-all for answering questions that may not be answered on your main pages.

▶ **Be comprehensive in your content strategy.** Target long-tail keywords by having deep content that covers every salient piece of information possible.

▶ **Each guest has unique needs.** Try to personalize the website experience as much as possible.

Are loyalty programs important?

The short answer is that for almost half of your potential guests, a loyalty program is very important. Therefore, it seems apparent that your property should offer some sort of loyalty program. Perhaps, the more challenging question is regarding what type of value your loyalty program should provide to your guests.

When choosing between a loyalty program that provided discounts and value to existing stay or provided greater value towards a future stay, overwhelmingly, guests want instant gratification.

We also asked the respondents to rank different loyalty incentives in order of which they would find most valuable. Again, there was a strong indication people are looking for immediate benefit from their loyalty program.

1. Free breakfast

2. Early check-In

3. Discounts for on-site restaurant, bar or shop

4. Free wi-fi

5. Discounts on future stays at the property

78%
prefer discounts & value on existing stay

22%
prefer greater value toward a future stay

Millennial Analysis

Millennials responded similarly in regards to loyalty programs, however they look for different benefits from a loyalty program, favoring discounts at the bar/restaurant over free breakfast and early check-in.

Key Insights

▶ **Guests are looking for instant value.** This gives hotels a huge opportunity to differentiate their property from the competition by offering added value in exchange for gaining more customer data.

▶ **Value doesn't have to break the bank.** Immediate value does not necessarily have to equate to spending more money on a guest. Think about what added value you can bring to a loyalty club member as thanks for their patronage without much cost.

▶ **Loyalty = opportunity.** A well-designed loyalty program cannot only differentiate your property, but it can also provide an opportunity to surprise, delight and enchant your guests, which leads to greater guest satisfaction and increased online reputation.

So, what have we learned?

We've determined that knowing your guest is essential to creating a website that gets noticed, walks guests through the booking journey and keeps them coming back. But with so much useful data gathered, it's easy to get lost in insights and analysis. Here are a few key things we think you should take away from this study:

1. You have multiple opportunities to win and lose.

It's clear from the data that leisure travelers are doing their homework. The fact that the consumer is visiting multiple sites, coming to your site multiple times and spending 30 minutes on your site to make their decision means that they are shopping and comparing your property to others.

They are initially looking for properties that look appealing; then they are comparing rates and the specific offerings. Be sure to include as much information about as many different aspects as possible throughout your website.

2. You need to have high-quality design & photography to succeed.

The vast majority of potential guests are going to judge your property on the initial visual impact that is made by your website.

Both the overall design of the site as well as great quality photography is a minimum requirement if you wish to remain within the consumer's decision set. They are making an initial classification of the property before returning to do further research into rates and amenities.

3. Differentiation is essential.

Given that rate is such a driving factor in the decision-making process, hotels must learn to separate themselves from the pack.

One clear method of doing so is by incorporating user-generated content such as experiential photos, guest reviews, and guest stories into your overall website experience.

If your property is being considered by the traveler, do everything you can to convince them that your property is the right choice over the competition.

4. We are in an era of instant gratification.

The industry continues to see an emphasis on the guest experience. The concept of "surprise and delight" leading to an enchantment of the guest is taking hold, and hotels are looking for ways to exceed the guest's expectations by offering new perceived value.

The definition of what a loyalty program is and what it provides has evolved as consumers have shifted their expectations to immediate rewards.

Savvy hotels will adapt to this new demand by looking for simple value-adding services that don't add too much cost to their operations.

With the onset of new technology such as mobile check-in making it easier for hotels to provide things like early check-in, hoteliers can define and offer new and innovative value to their guests.

5. Different people behave differently.

We do not live in a one-size–fits-all society. Different generations and different types of people behave differently and have different demands and expectations. These findings highlight the importance of knowing as much as possible about your guests so that you can customize the experience to the individual. In an era where the experience really matters, hotels need to go above and beyond with their level of personalized service.

About Fuel

Fuel is a full-service online marketing agency that specializes in providing simple and effective software and digital marketing solutions to the hospitality industry.

Our standard is to provide quantifiable results, strategies driven by direct revenue, and exceptional customer service and support. Our services include:

- **Mobile app development**
- **Hotel marketing strategy**
- **Search engine optimization**
- **Pay-Per-Click management**
- **E-mail marketing**
- **Social media management**
- **Website development**
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About Flip.to

Something special happens when travelers discover your hotel through real experiences shared by friends & family.

Flip.to lets your guests introduce your hotel to the world, attracting an audience of travelers worldwide, and earning new guests each and every day.

- **Boost revenue** with an entirely new channel of new guests booking direct.

- **Compete at an entirely new level** when you warmly introduce your hotel to a global audience before your competitors even have a chance.

- **Amplify your brand** with an incredible library of content that never stops growing—authentic guest stories more potent than any stock photo.

- **Realize the huge impact of advocacy.** Flip.to customers earn double, triple, and four-digit ROI—across the board.

- **Start reaching, inspiring and converting** this massive audience like never before when you switch on the advocacy platform for hotels.

Take a tour, and see the crazy big impact for hotels around the globe at flip.to.

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