THE EUROPEAN TRAVELLER'S BEHAVIOURS

TRENDS, OPPORTUNITIES AND CHALLENGES OF THE EUROPEAN HOSPITALITY INDUSTRY

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METHODOLOGY

Europe

5000+ people answered the survey

Four different countries in Europe took part – France, Italy, UK and Russia

Travellers from the four countries surveyed asked a series of questions about hotel experience

Commissioned by Sabre
Surveys were taken online in February 2020

THE SHIFT IN THE SHOPPING AND BOOKING CHANNELS

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SHOPPING AND BOOKING CHANNELS PREFERENCE PER COUNTRY

45% of European travellers rely on a **travel specific search engine** (e.g. Expedia, Trivago, Booking.com etc.) to find the best hotel deal

Italy	**64%**
France	**45%**
UK	**46%**
Russia	**23%**

SHOPPING AND BOOKING CHANNELS PREFERENCE PER GENERATION

A travel specific search engine (e.g. Expedia, Trivago, Booking.com etc.) is the first place to find the best deal

Gen Z (18-24)	Gen Y (25-44*)	Gen X (45-54)	Baby Boomers (55+)
45%	**52%**	**49%**	**38%**

* Millennials

SHOPPING AND BOOKING EXPECTATIONS

Travellers are looking for specific services and offers during the booking process

52%

Allow me to choose products/services which are usually included in the room rates

36%

To receive discounts on items already purchased in the past

30%

Be able to select extra services for a personalised stay/experience

29%

Receive offers based on my previous hotel bookings

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DATA & ANALYTICS TO UNDERSTAND GUESTS' PATTERNS

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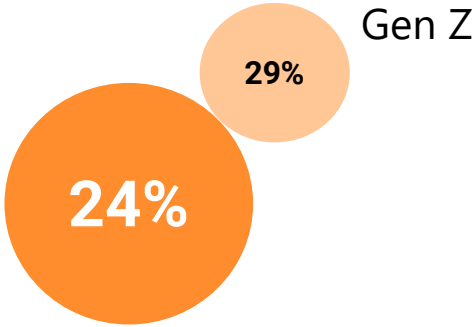
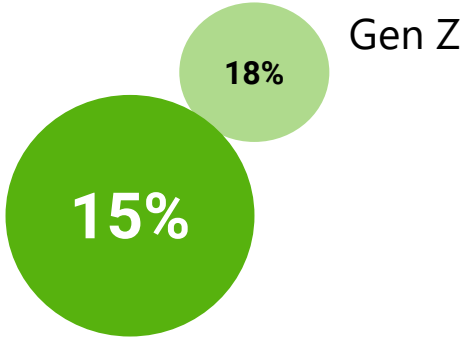
PERSONALISATION, RETENTION AND DATA

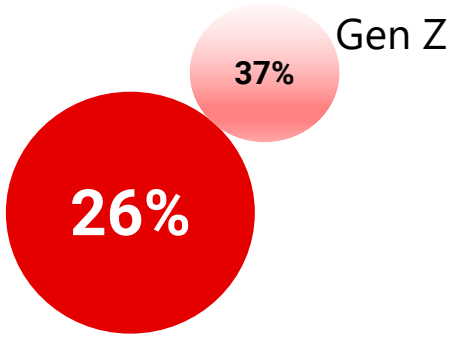
European travellers are willing to share personal data in return of personalised offers but don't know really what to share



Would be more likely to be loyal to a hotel studying previous booking details to offer even more personalised services



Willing to share their location in return for a personalised service



Willing to share basic personal data (date of birth, occupation, phone number, etc.) in return for a personalised service

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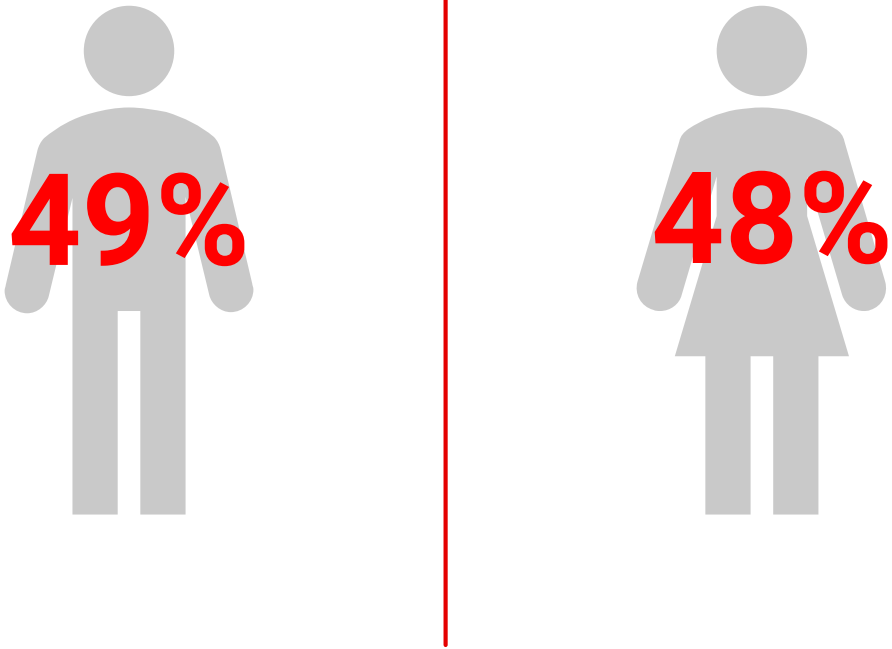
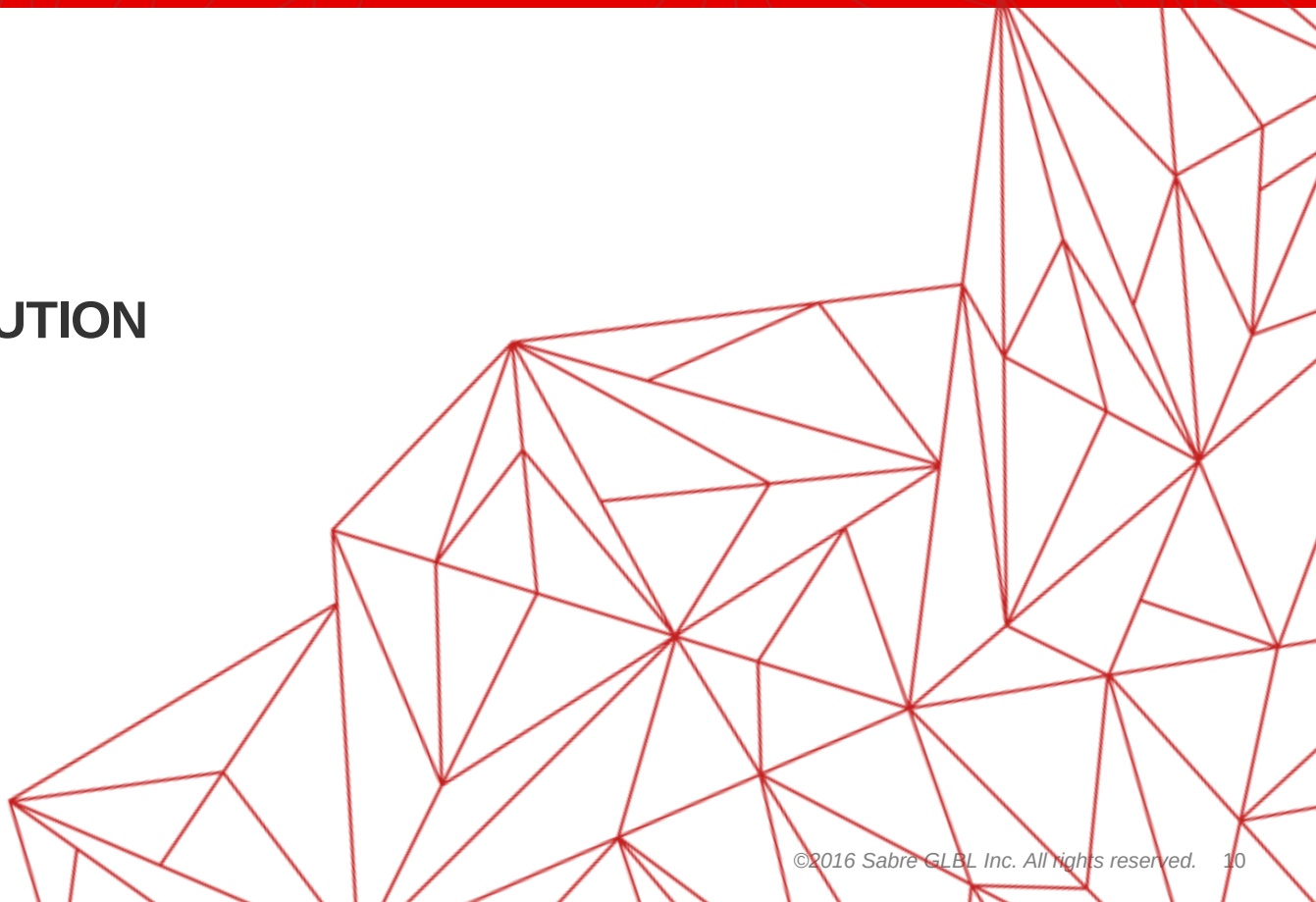
PERSONALISATION, RETENTION AND DATA PER GENDER

Men and women are equally willing to share data



THE RETAIL REVOLUTION OPPORTUNITY



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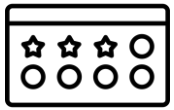
WHAT WOULD EUROPEAN TRAVELLERS SPEND MORE ON AT A HOTEL?

Travellers want to be offered a unique experience that is not necessarily tied to a room reservation

36%

If the hotel provides a quality service

31%



If the hotel offers a loyalty/points scheme
(e.g. being offered reward/discounts for usage at the hotel)

27%

If the hotel offers services tailored to my personal budget

25%

If I could book all components directly with the hotel
(transportation tickets, bike rentals, etc.)

25%

If I could add on separate policies I value
(pet allowance, cancellation policy, late check-out, etc.)

WHAT ARE THE PREFERENCES IN TERMS OF EXTRA SPEND?

The popularity of each ancillary varies between countries

Most popular

Overall	Italy	France	UK	Russia
quality service	all components @hotel	loyalty/points scheme	quality service	quality service
loyalty/points scheme	personal budget	quality service	loyalty/points scheme	loyalty/points scheme
personal budget	Policies I value	personal budget	personal budget	all components @hotel
all components @hotel	quality service	Policies I value	Policies I value	personal budget
Policies I value	loyalty/points scheme	all components @hotel	all components @hotel	Policies I value

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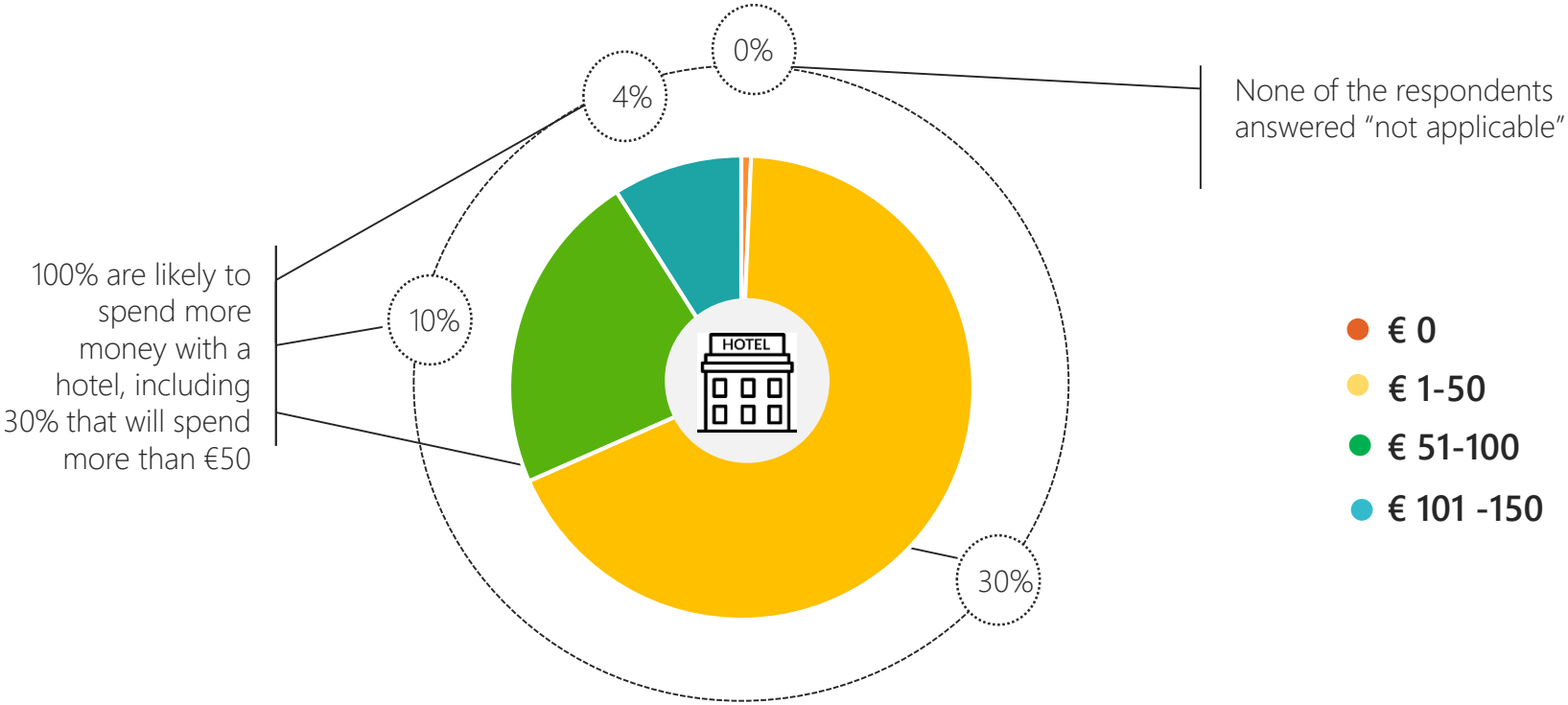
HOW MUCH WOULD THEY SPEND?

100% are willing to spend on ancillaries - and nearly one third would spend up to €50



IMPROVING PERSONALISATION THROUGH A HOLISTIC RETAILING MODEL

European travellers would be willling to pay more for specific offers and services they value

53%

ALL COMPONENTS DIRECTLY AT THE HOTEL
(e.g. transportation, tickets for events, local guides, bike rental etc.)

45%

EXTRA SERVICES TO IMPROVE THE HOTEL EXPERIENCE
(e.g. butler service, baby sitting service, daily fresh flowers in room etc.)

40%

PERSONALISED OFFERS AROUND ACTIVITIES AT THE HOTEL
(e.g. yoga classes at the gym, painting classes, a concert in the lobby etc.)

60%

PICK AND PAY SEPARATELY POLICIES THE GUEST VALUES
(e.g. cancellation flexibility, pet allowance, early check-in / late check-out, unbundled insurance, etc.)

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THINKING OUTSIDE OF THE ROOM AND BEYOND THE GUESTS

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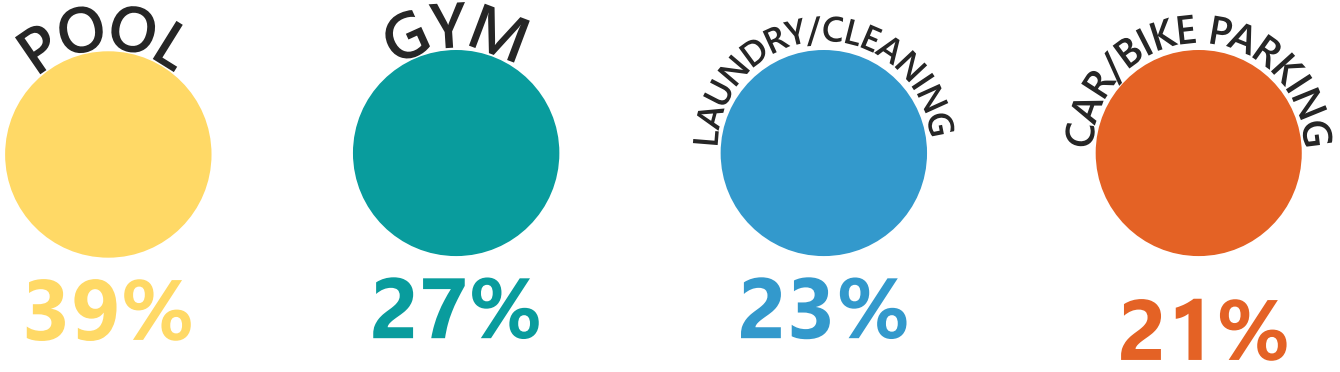
ARE EUROPEAN TRAVELLERS LOOKING AT HOTELS FOR NON-TRAVEL PURPOSES?

Consumers consider paying to use a local hotel as a service provider to the nearby community



“The default idea is that the holistic retailing model is only appropriate for upscale or luxury properties, but in this holistic retailing model hotels are only limited by their imagination.”

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OPPORTUNITY WITHIN A RETAIL REVOLUTION

Main findings from Sabre survey

- With rife fragmentation and vague pricing in hotel industry, technology can help simplify the channel optimization
- European travellers demand and expect personalised guest experience that is not necessarily tied to a room reservation, also during the booking process
- Thinking beyond the room can unlock a higher level of personalisation, loyalty and guests retention
- Travellers willing to spend up to €50 on ancillary and unbundled services – golden retail opportunity for hoteliers

Conducted by YouGov on behalf of Sabre
Fieldwork Dates: 12th - 23rd February 2020

THANK YOU

Frank Trampert
Sabre Hospitality Solutions
#retailrevolution

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