



Creating the Coveted Hotel Guest Experience

Perspectives from Consumers and Hoteliers

An Oracle Hospitality-Phocuswright Study

Overview



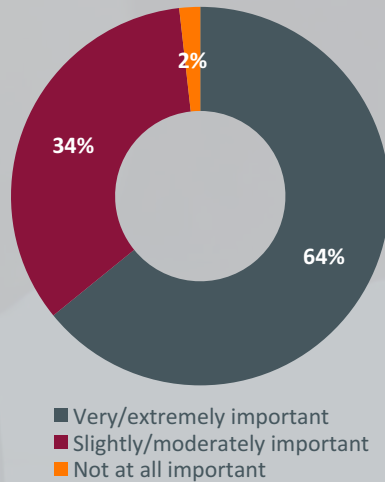
From planning a trip to selecting a hotel to commenting about the guest experience on Facebook, the travel lifecycle can be a meandering journey, filled with opportunities for consumers to engage with hospitality brands. The key for your enterprise's success, of course, is making those moments count.

Oracle Hospitality commissioned Phocuswright, a leading industry research firm, to survey travelers to better understand the impact of technology of the hotel-guest experience...

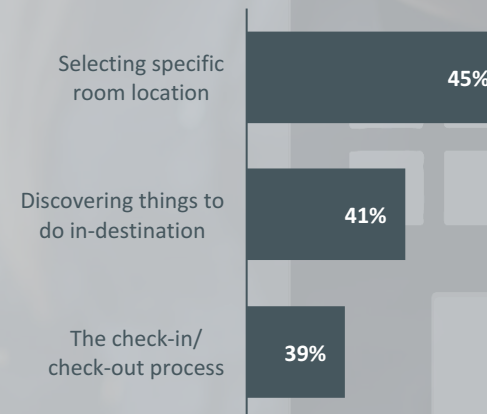
Overview CONTINUED

This report provides data that explains where guests want hotels to invest to create that coveted guest experience.

Nearly 2/3 of U.S. hotel guests said it was very/extremely important for hotels to continue investing in new technology to enhance the guest experience.



And here are their top 3 preferences



The Hotel Guest Perspective

(click on the icon to explore further)

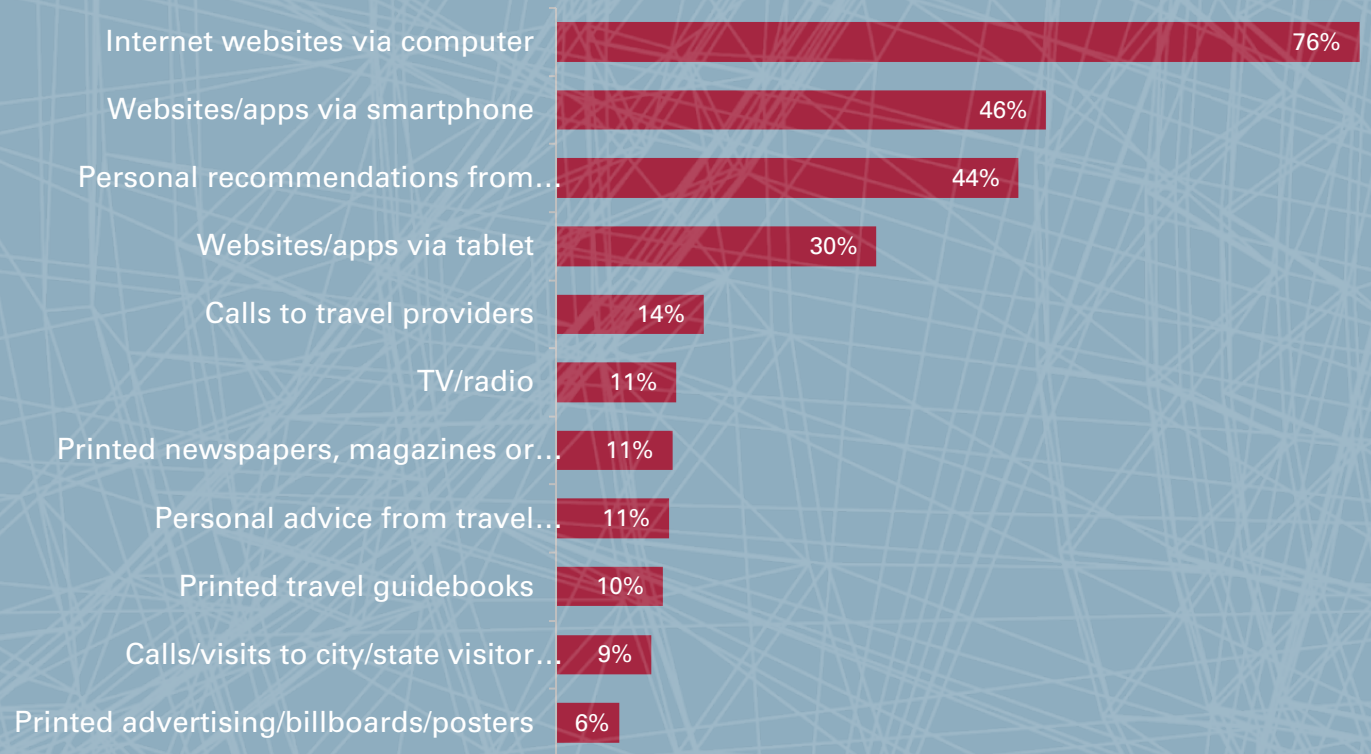




Pre-Stay

Guests are using the following sources to compare and choose hotels

Online and Offline Information Sources Used to Compare and Choose Hotel Options (U.S. hotel stayers)

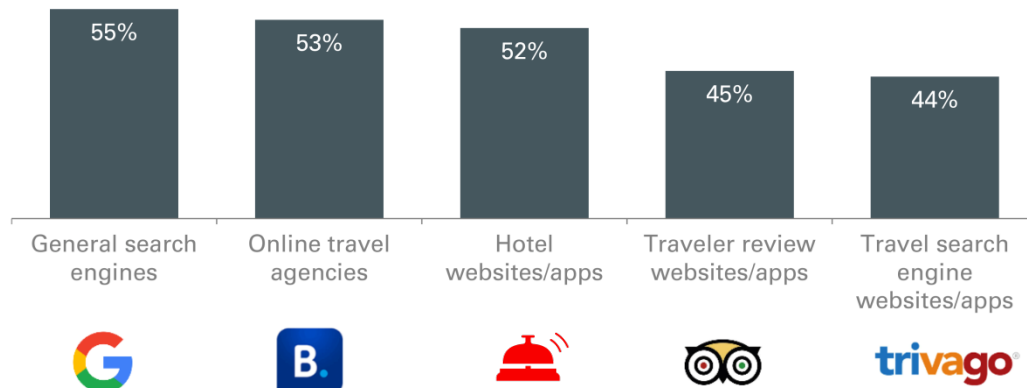


Pre-Stay CONTINUED

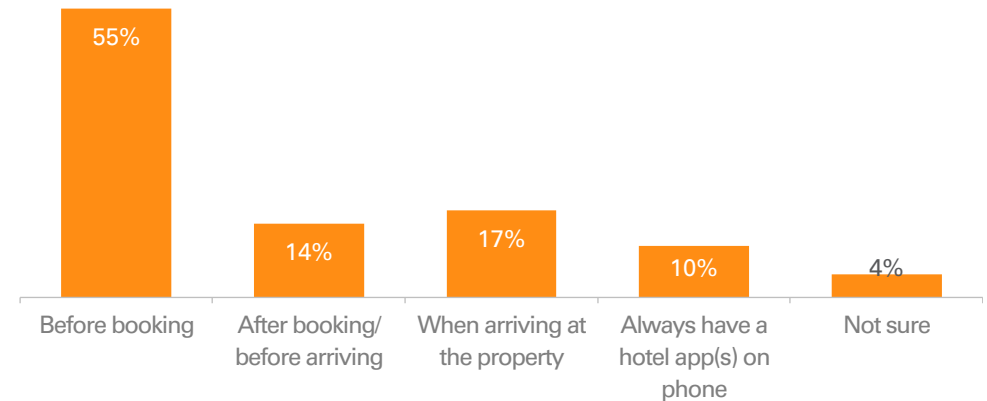


Hotel websites are often used to compare options in addition to general search engines and OTAs

Top Websites/Apps Used To Compare and Choose Hotel Options
(U.S. hotel stayers)



Guests are downloading and using hotel apps, most prior to booking



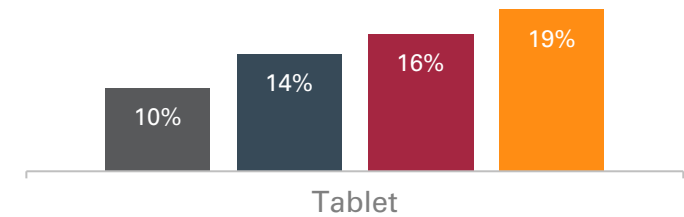
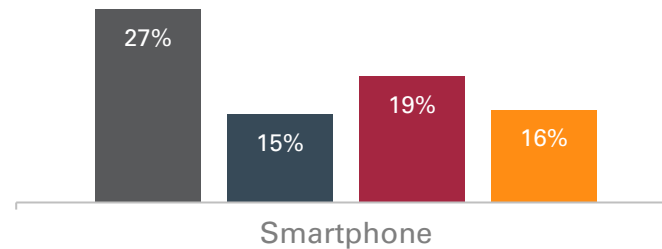
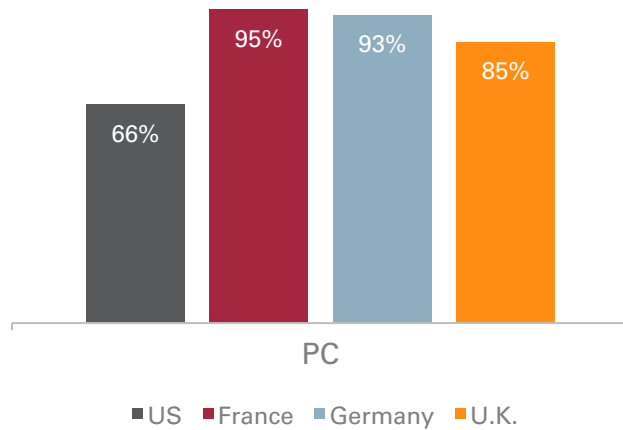
Pre-Stay CONTINUED



For booking, while PC is used most often everywhere, Smart Phones and Tablet usage is increasing

Booking on PCs is most common for all hotel stayers

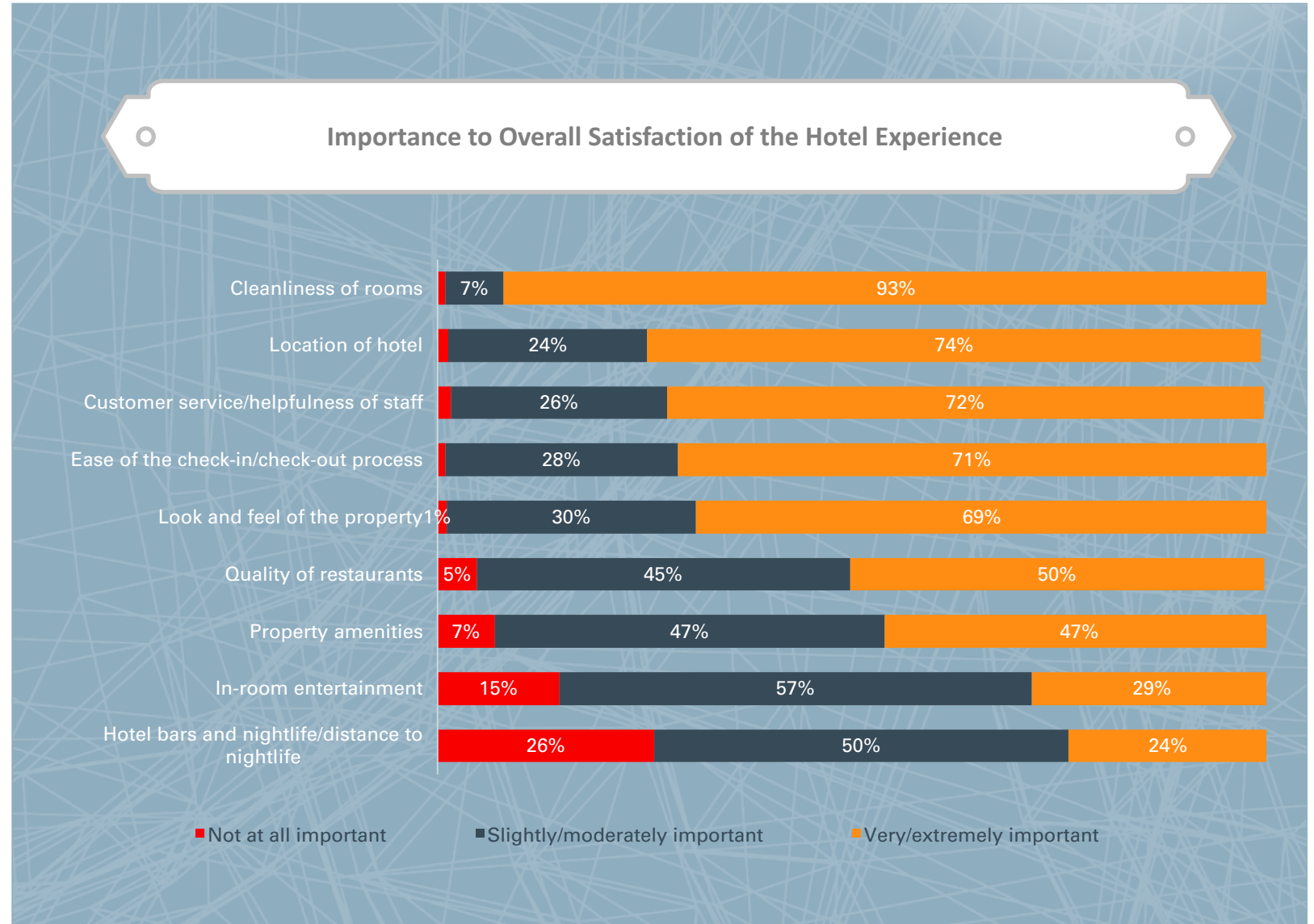
Smartphone booking is quickly catching up to PCs in the U.S. Meanwhile, Europeans book on tablets nearly as frequently as smartphones.





On-Property

Customer service offerings are the most important part of a hotel experience to guests

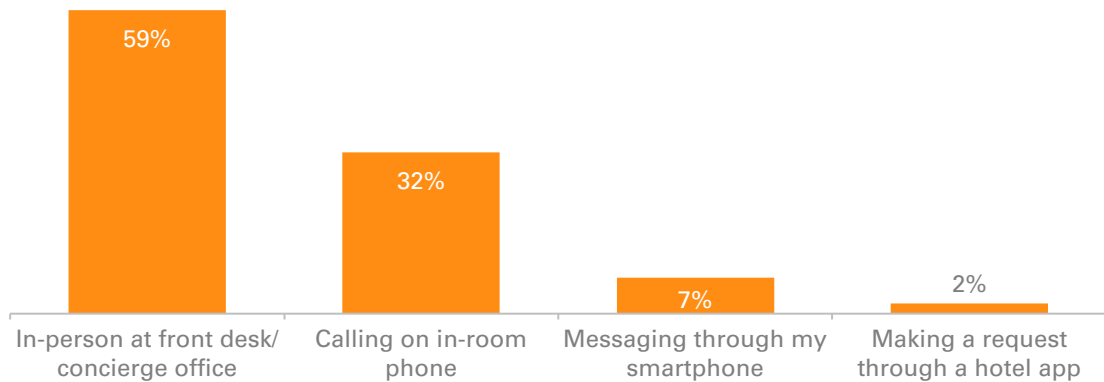


On-Property CONTINUED

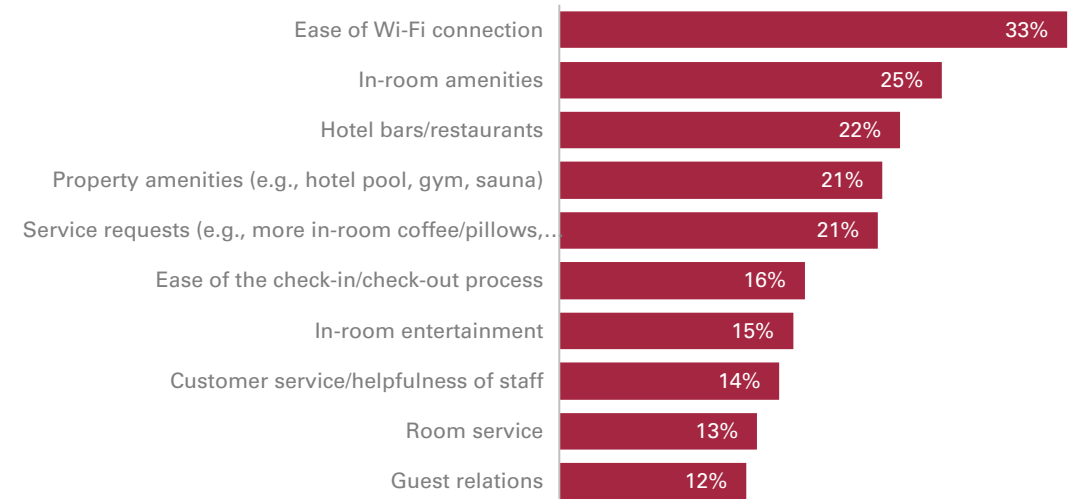


Guests still prefer face-to-face communication with hotel staff. Wi-Fi connections are the most commonly used hotel feature – and also the most common source of discontent.

Preferred Way of Communicating with Hotel Staff



Experiences guests say do not meet their expectations

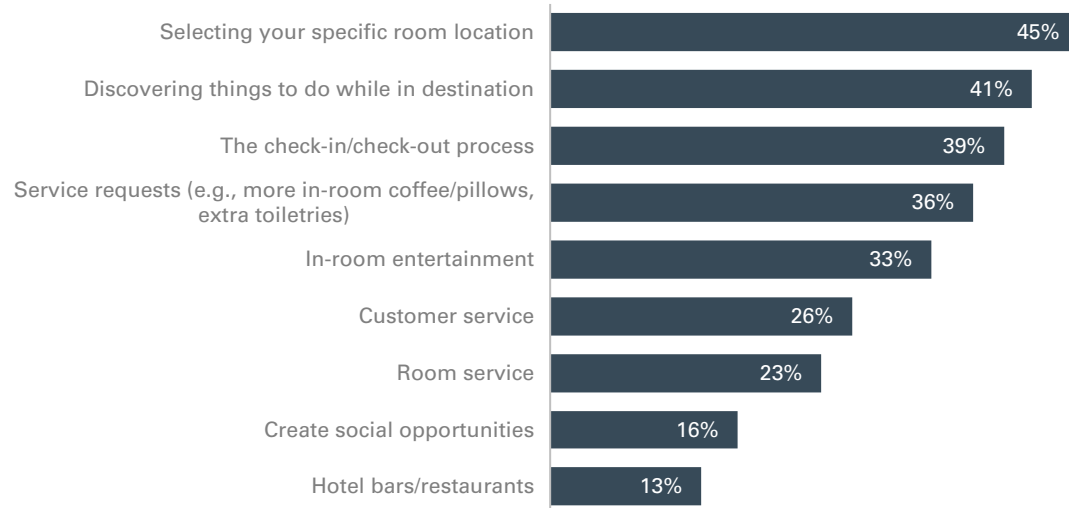


On-Property CONTINUED



Technology investments can help

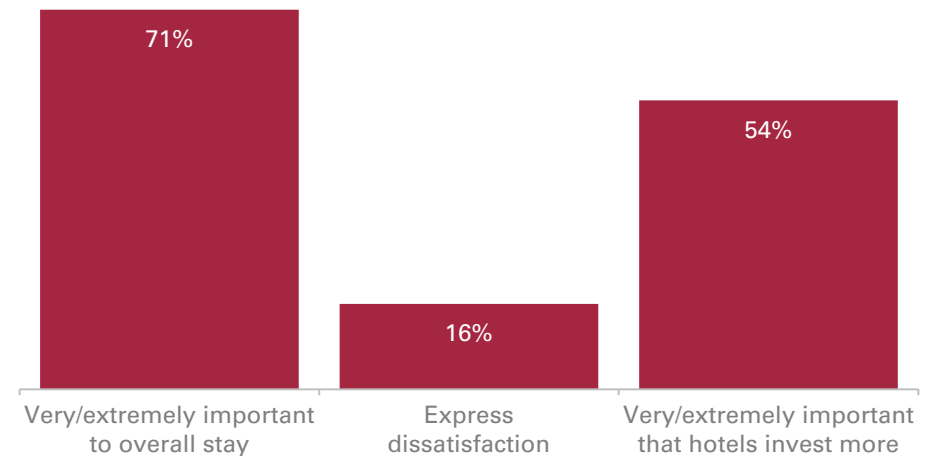
Guests want technology to improve their hotel experience



What's the point of virtual check-in if guests still need to pick up the key at the front desk?

– U.S. Hotel Chain

Ease of check-in/check-out is a top priority of guests

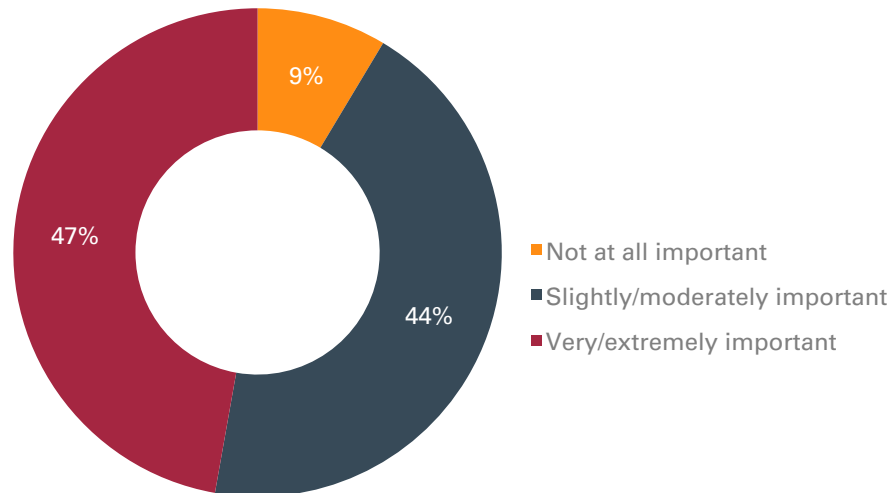


On-Property CONTINUED



Guests clearly want hotels to invest in keyless room entry

Guest Perspective: Importance that hotels invest more



Hotel Perspective:

- Not yet implemented by most chains, but many have plans or already run pilots (especially young brands and new properties).
- Not offered by independents and no future plans (especially in Europe).
- Types of keyless technology mentioned by hoteliers include: Room door PIN code sent via email, QR code to app, Key code to app using NFC, Bluetooth or tone to open door.

Only if we replace doors it makes sense to switch to keyless—it's too expensive to convert them.

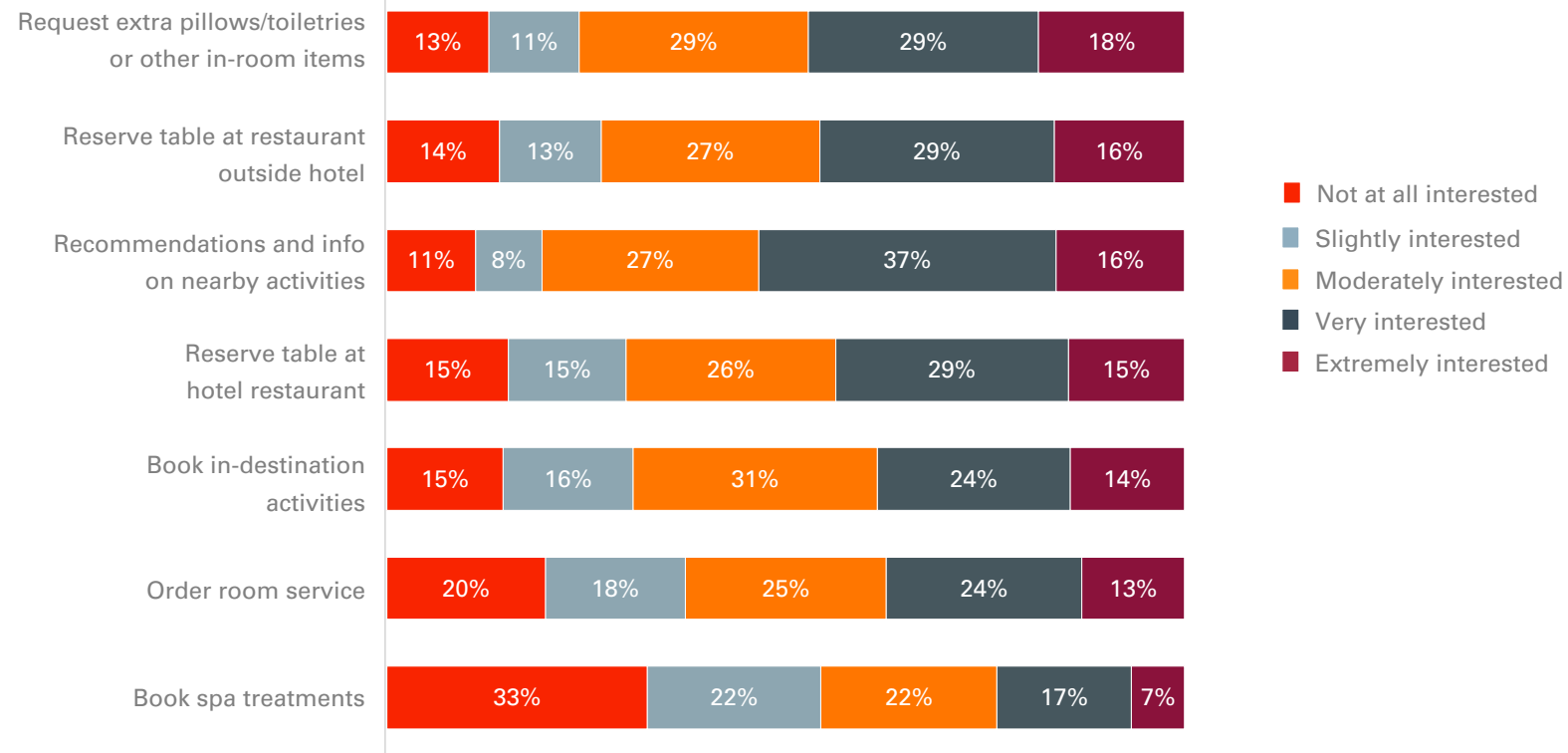
– European Hotel Chain



On-Property CONTINUED



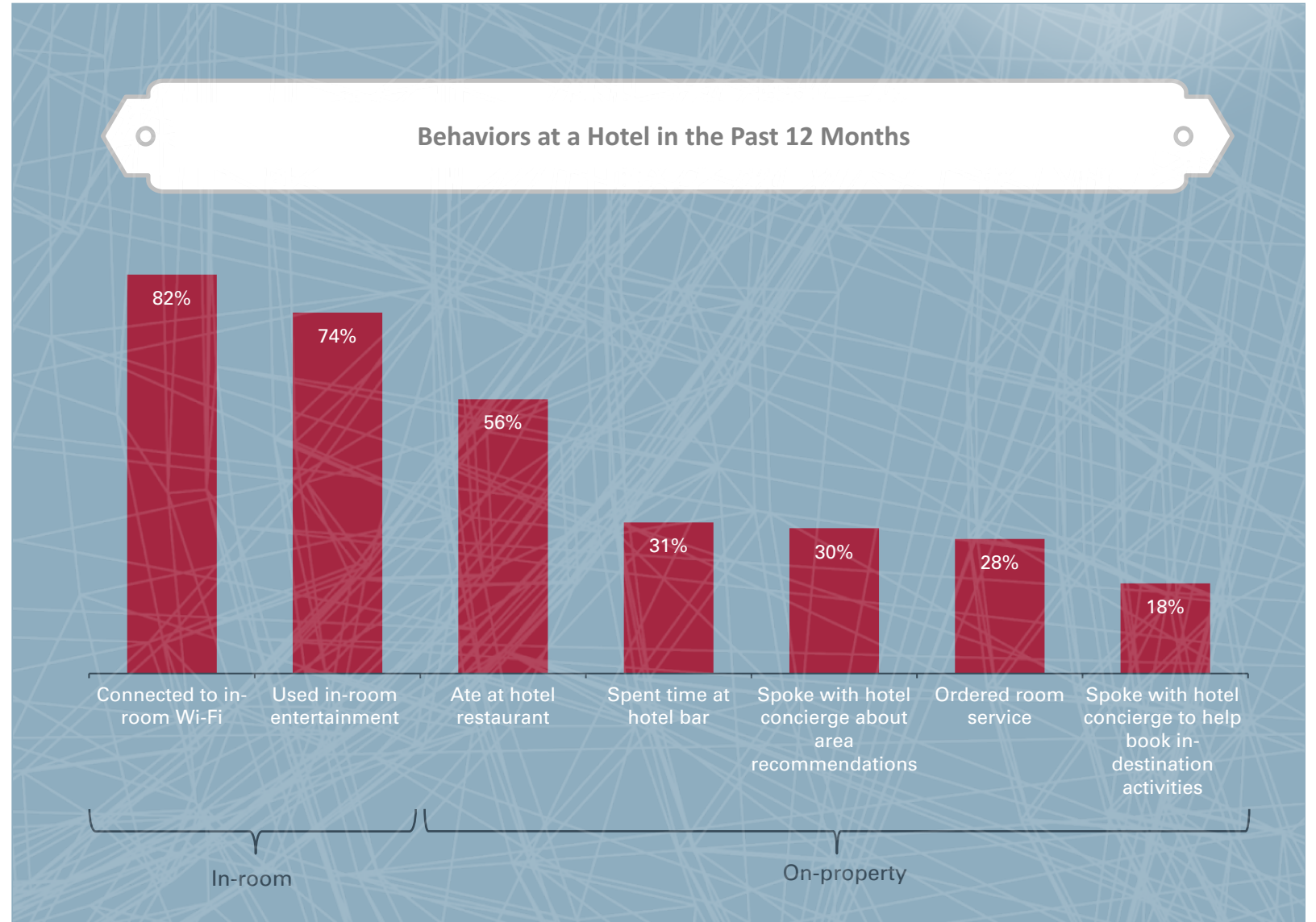
Interest in Using Messaging App on Phone While Staying at a Hotel





In-Room

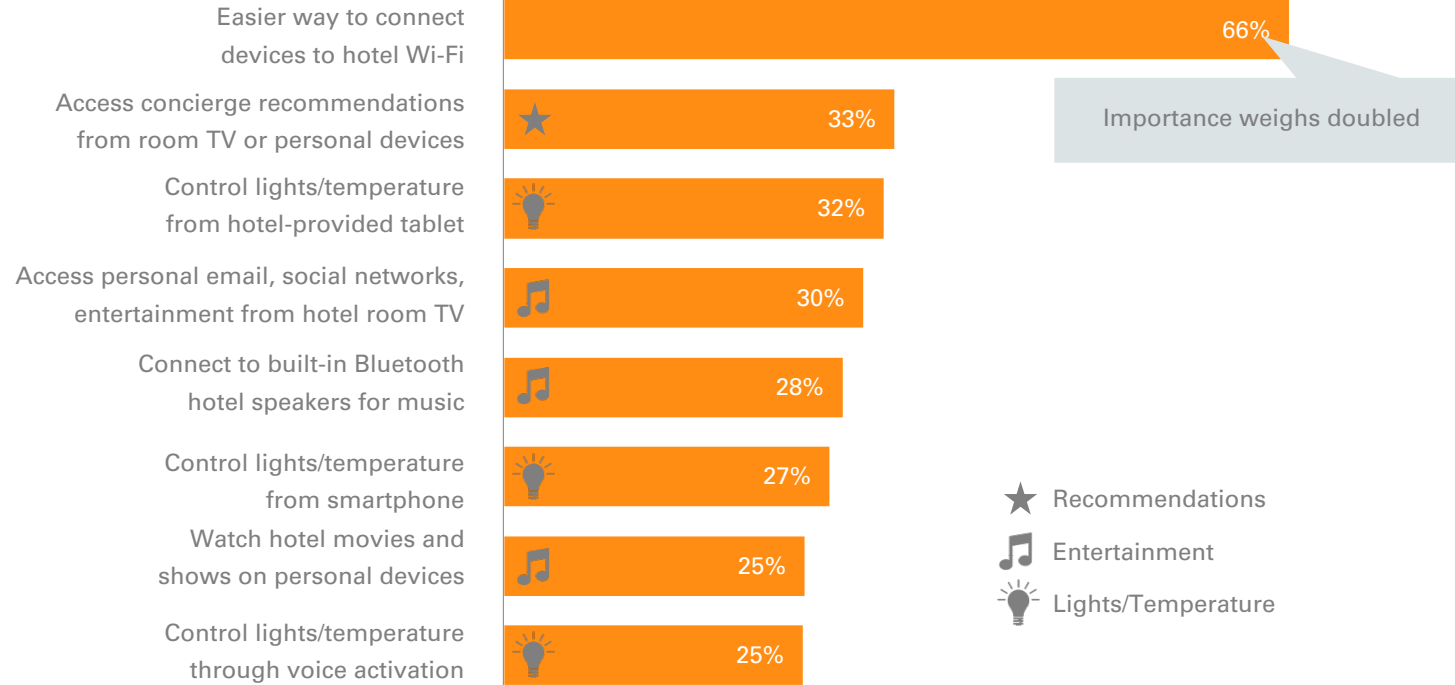
In-room features are used more than on-property



In-Room CONTINUED



Guests ratings of in-room functionalities

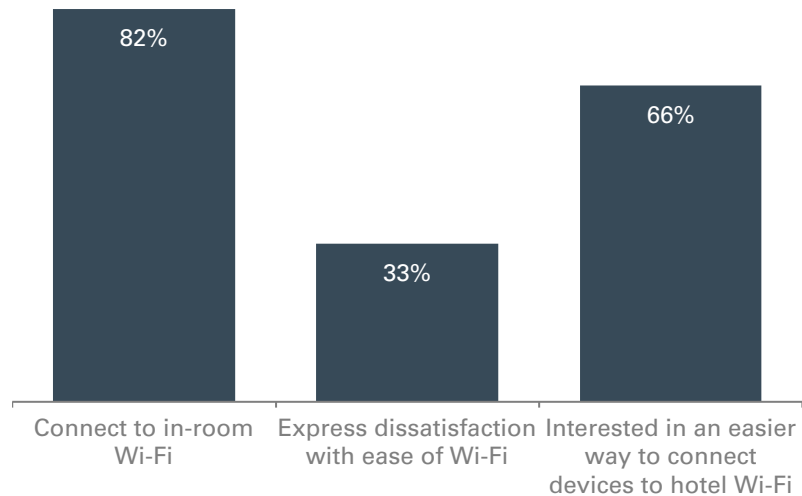


In-Room CONTINUED



Importance of the Wifi Connection to Guests

Guest Perspective



Hotel Perspective:

- Available across all hotels
- Great importance to guests perceived by hoteliers
- Smaller independents in Europe associate technological advancements primarily with offering Wi-Fi access

Wi-Fi is very important for our guests. It's the first thing they ask for when they arrive.

– *European Hotel Chains*

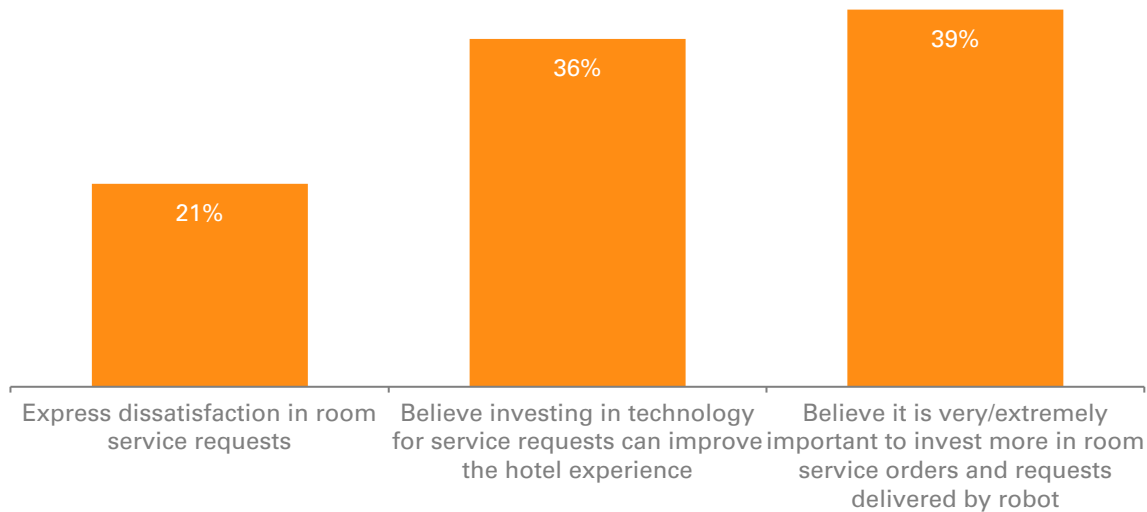


In-Room CONTINUED

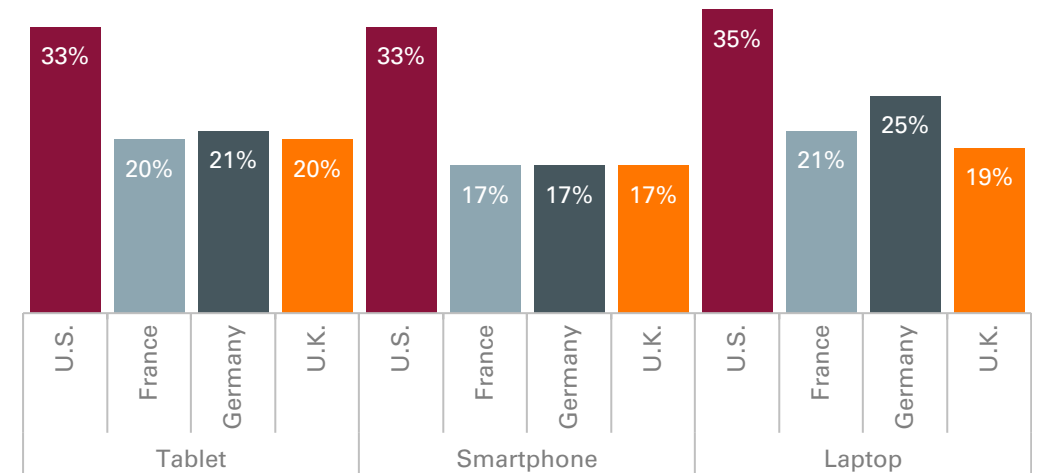


Guests believe room service is an opportunity for hotels to improve and are interested in watching in-room entertainment on various devices

Room Service Requests



Streaming shows and movies on personal devices with in-room Wi-Fi

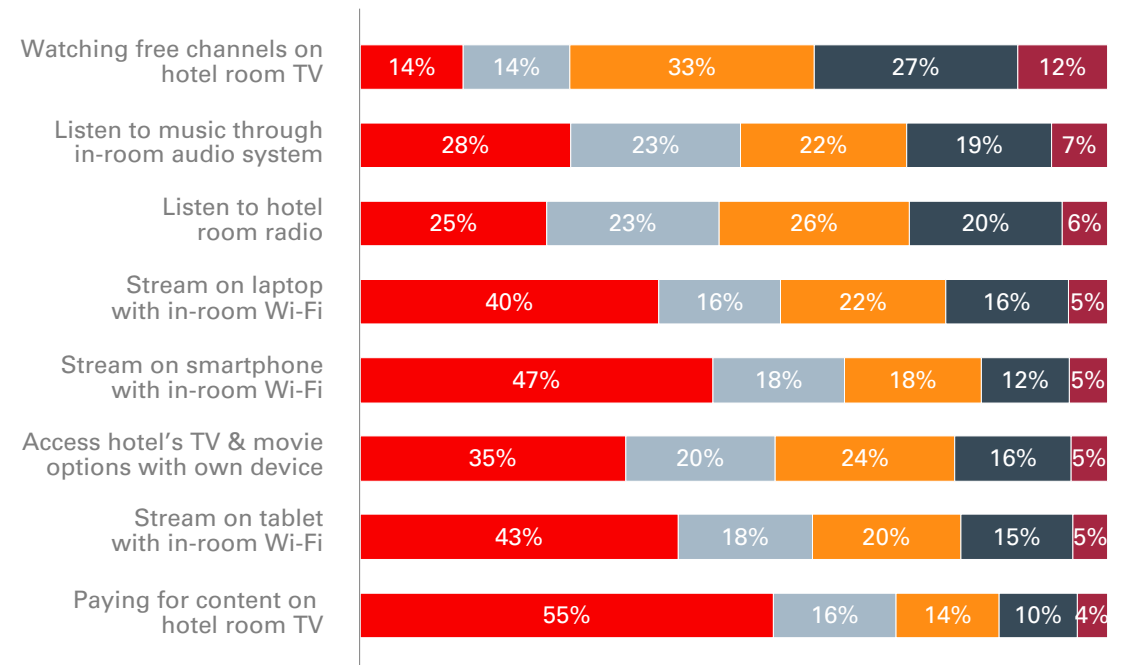
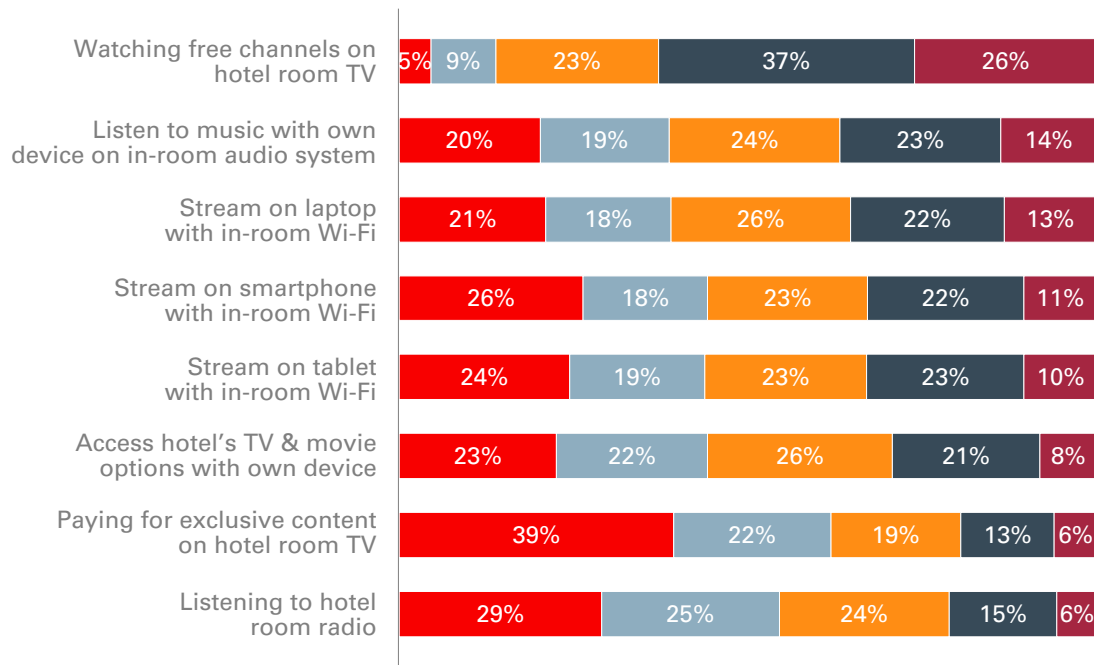


In-Room CONTINUED



What in-room entertainment are guests interested in using? **U.S.A.**

What in-room entertainment are guests interested in using? **France**



■ Not at all interested
 ■ Slightly interested
 ■ Moderately interested
 ■ Very interested
 ■ Extremely interested

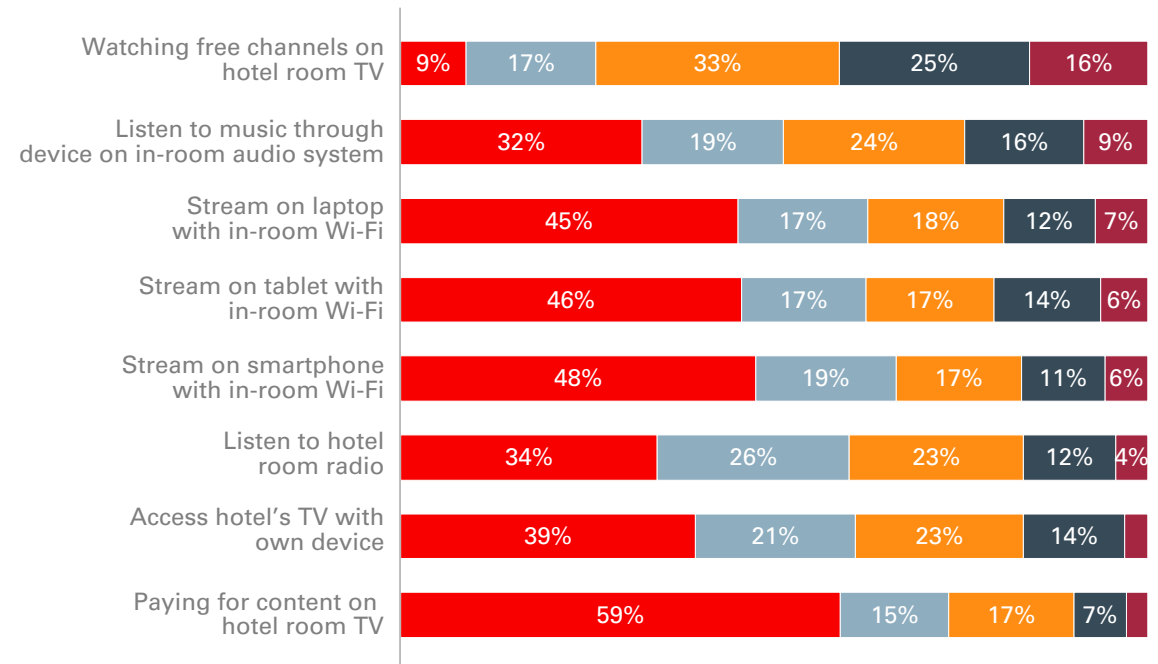
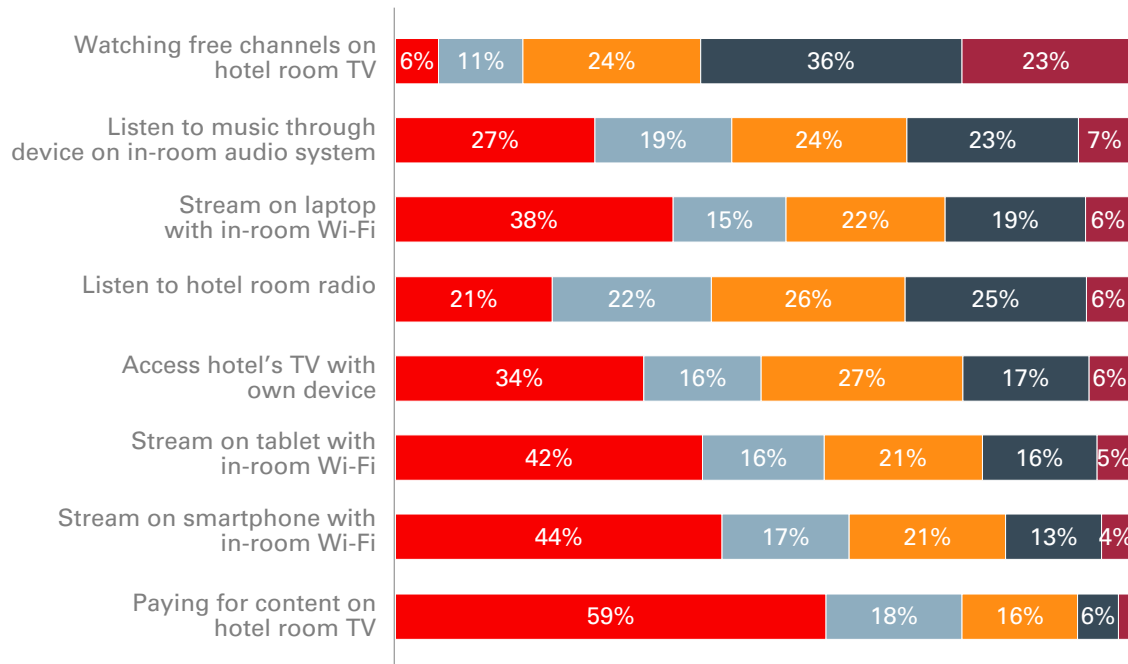


In-Room CONTINUED



What in-room entertainment are guests interested in using? **Germany**

What in-room entertainment are guests interested in using? **U.K.**



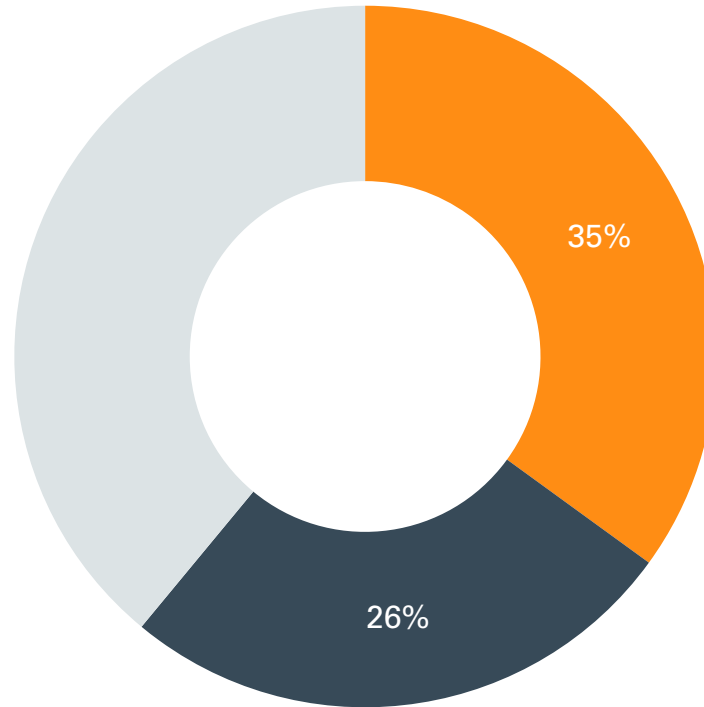
■ Not at all interested
 ■ Slightly interested
 ■ Moderately interested
 ■ Very interested
 ■ Extremely interested





In-Room CONTINUED

Guests want greater control over of housekeeping services



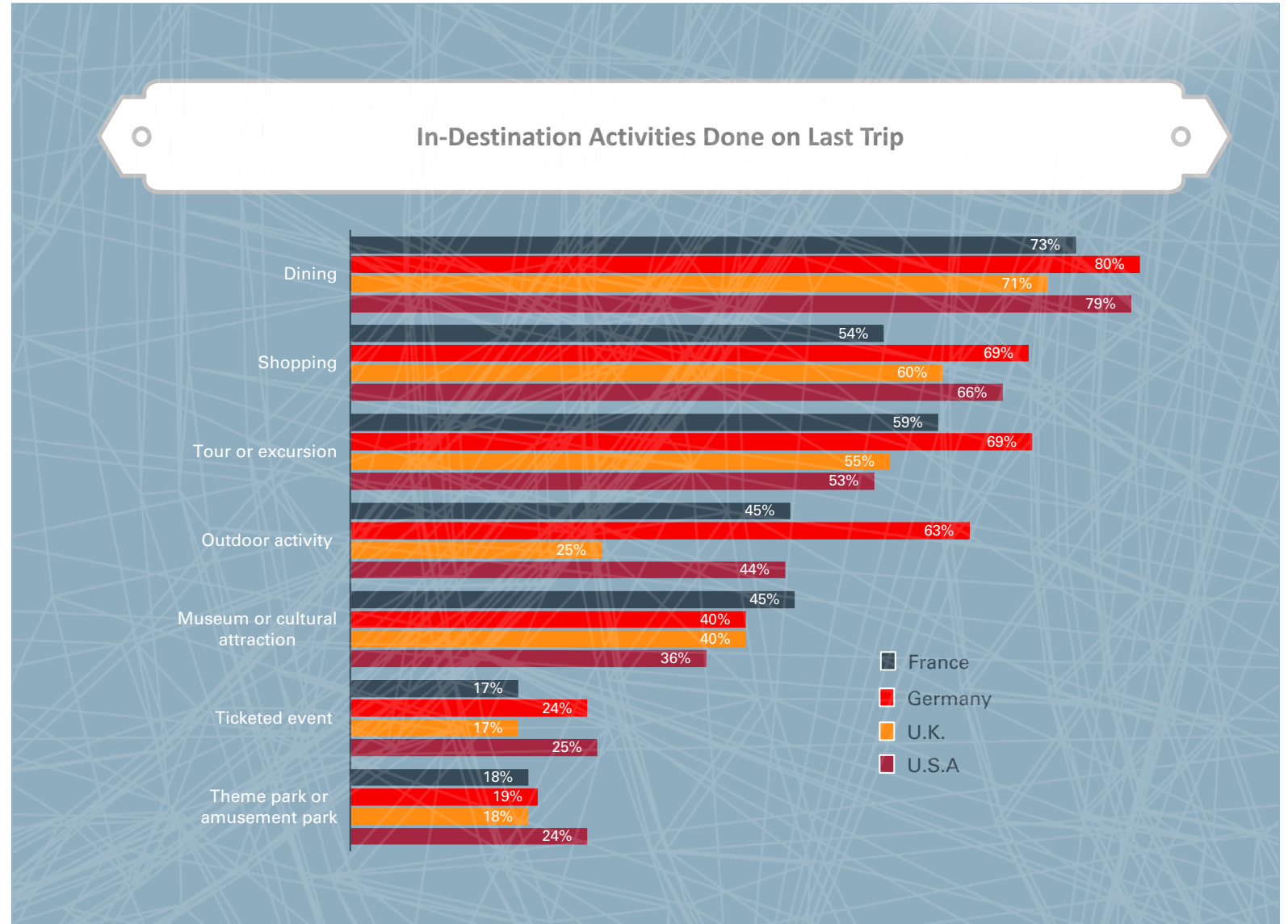
- want to schedule housekeeping services
- want to receive messages on their smart phones to provide room status (when the room is being cleaned)





In-Destination

Guests enjoy going off property for their in-destination experience



In-Destination CONTINUED



Only 38% percent of guests asked the concierge for help with recommendations or reservations, meaning 62% did these activities on their own, likely via the internet

10%

Both

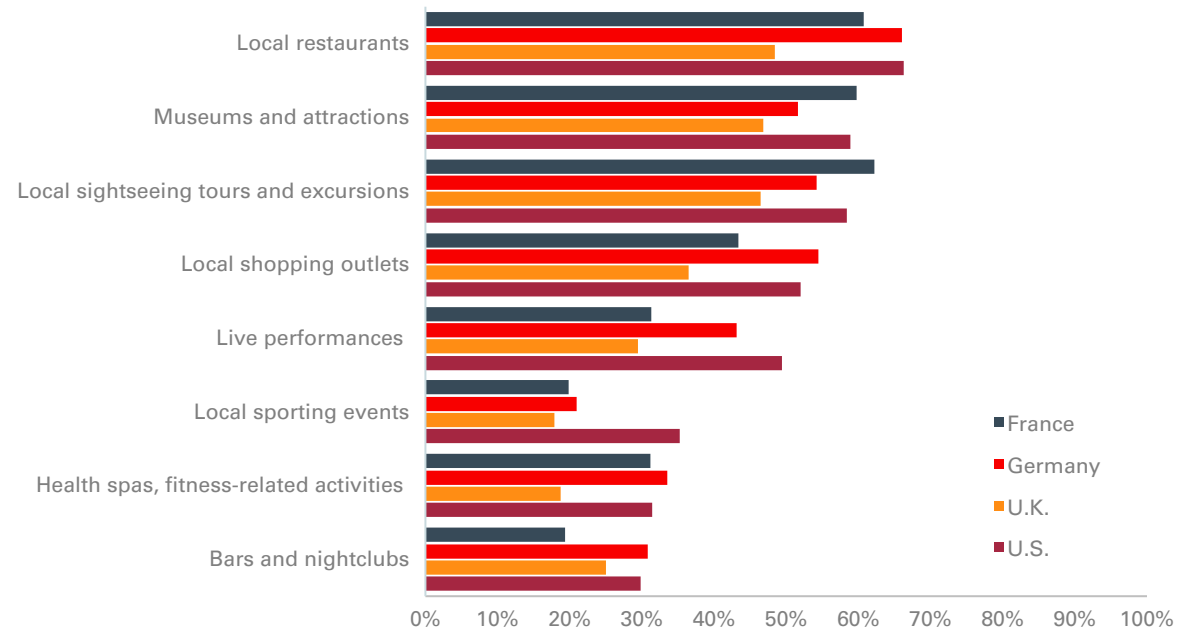
20%

Asked concierge about area recommendations

8%

Asked concierge about reservations of activities

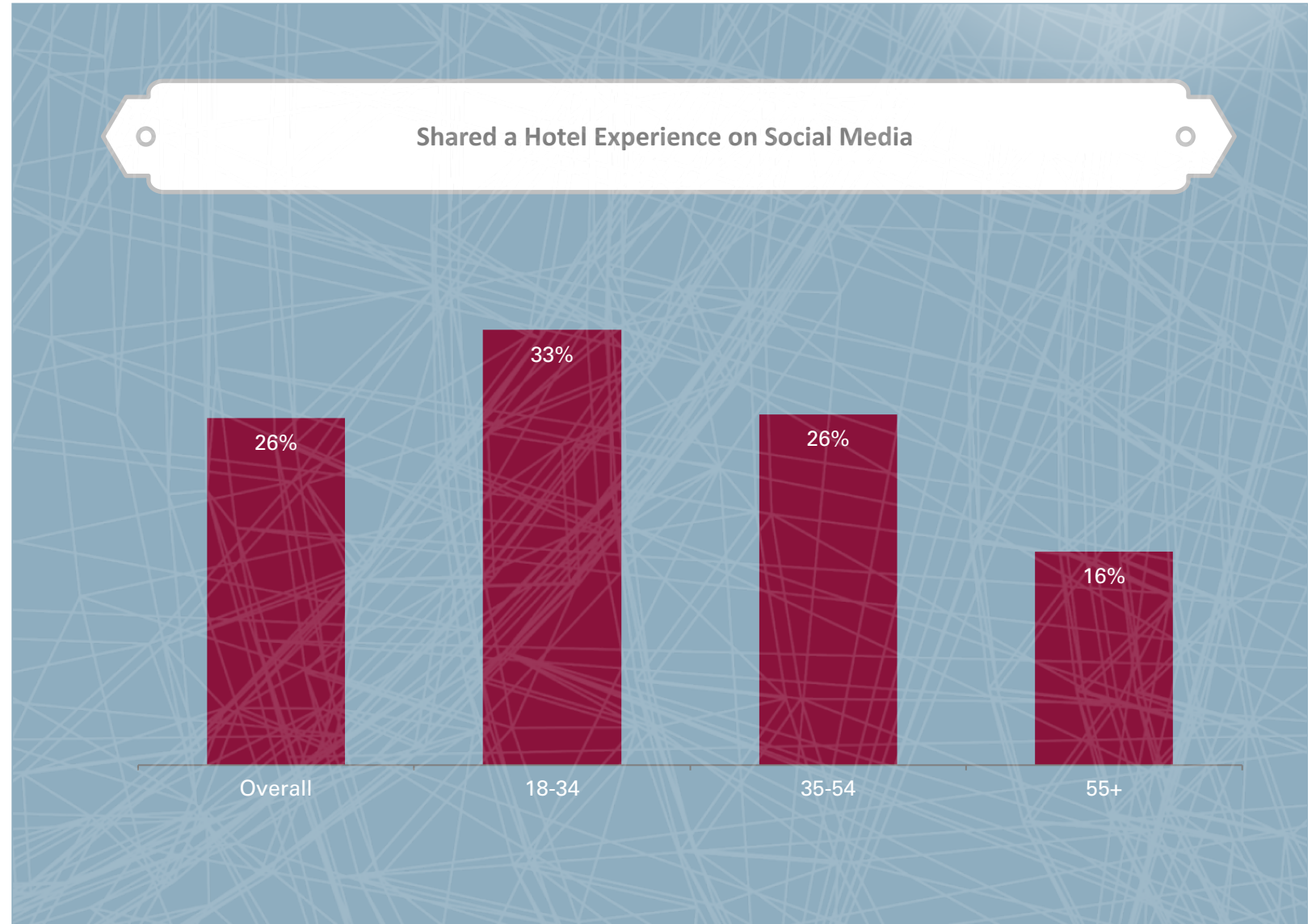
Guests want hotels to provide recommendations in the following areas





Post-Stay

Many guests have shared their hotel experience on social media

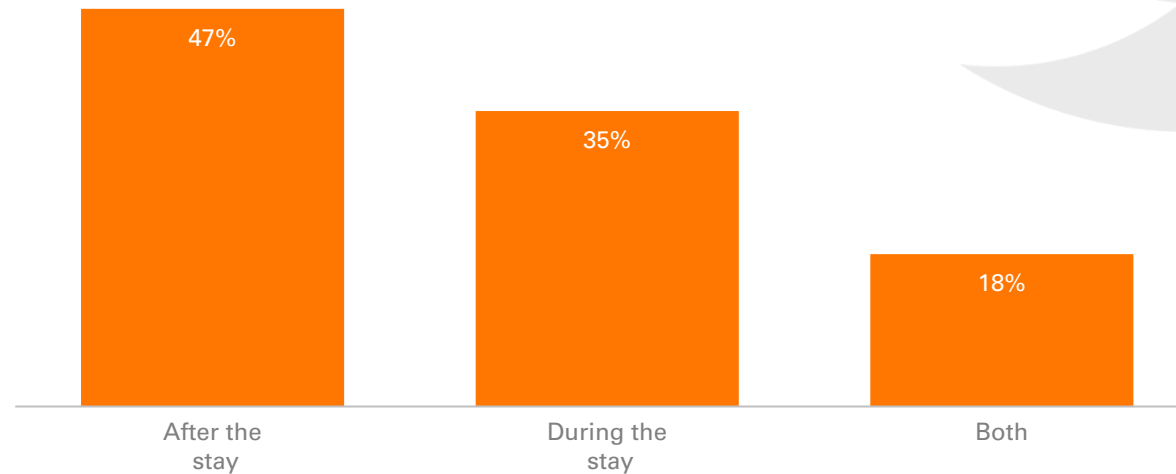


Post-Stay CONTINUED



The majority of U.S. travelers post a review on social media

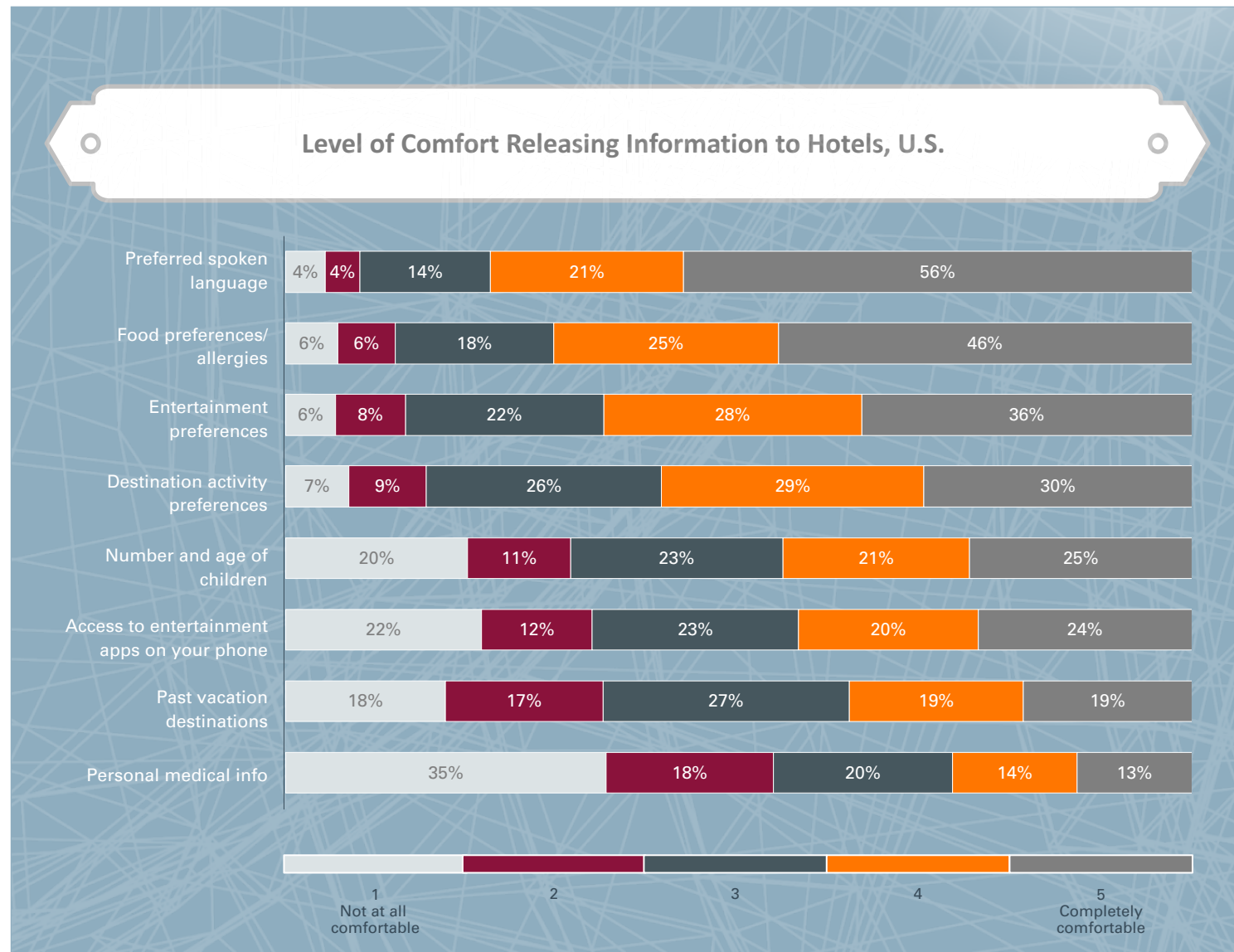
Point in Time Posted to Social Media





Personalization

Guests are comfortable releasing information to hotels, to help them create a more personalized experience



Personalization CONTINUED



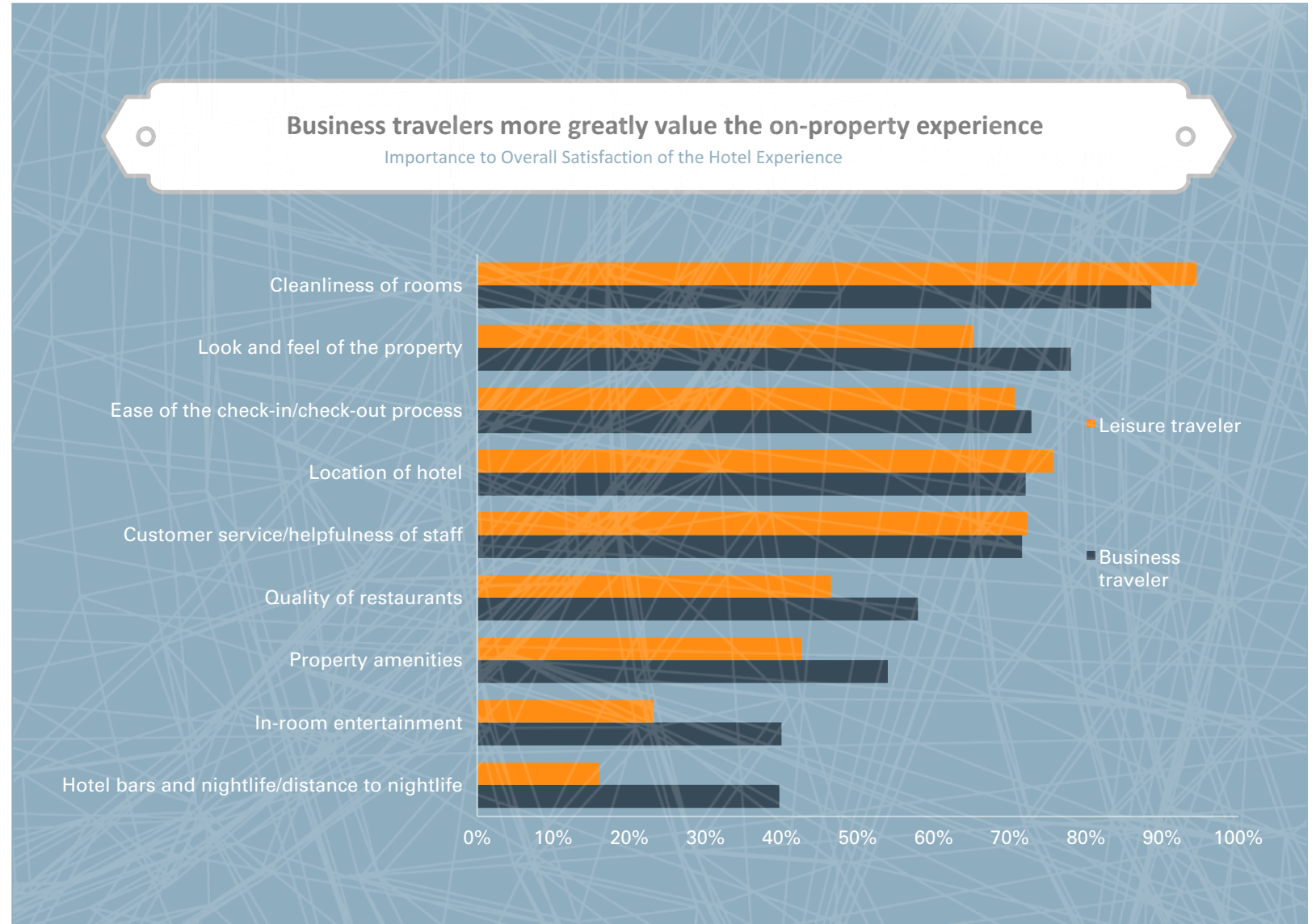
Guests want the following information sent to their smart phones from hotels:





Business vs. Leisure

80% of business travelers also stayed in hotels for a leisure trip in the past year

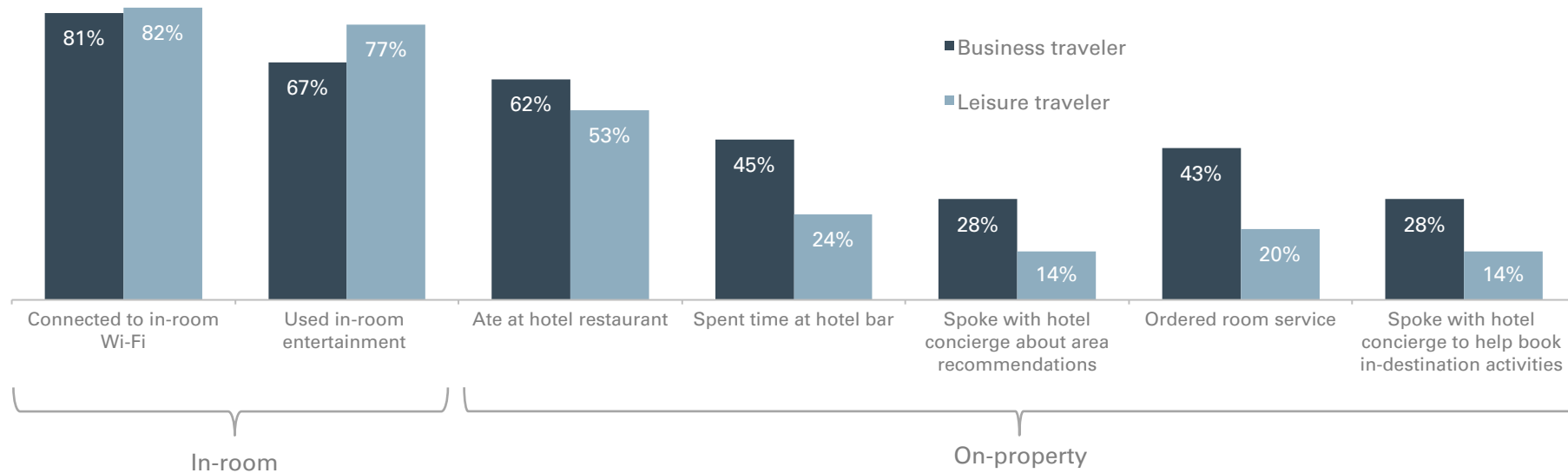


Business vs. Leisure CONTINUED



Business travelers use the on-property features more than leisure travelers

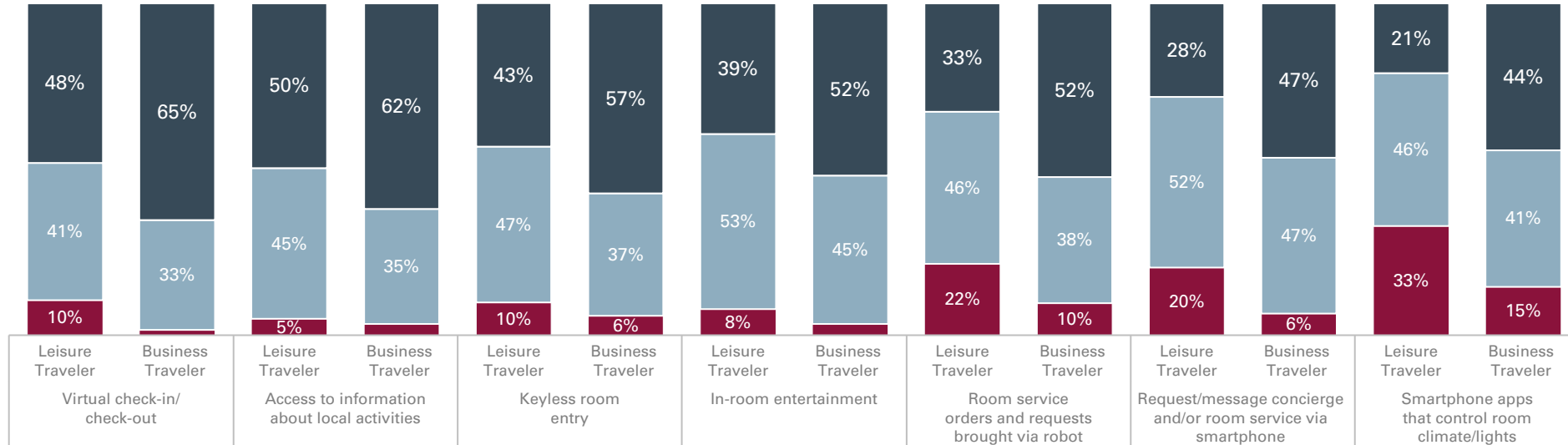
Behaviors at a Hotel in the Past 12 Months



Business vs. Leisure CONTINUED



Business travelers believe it's very/extremely important for hotels to invest in technology



■ Not at all important

■ Slightly/moderately important

■ Very/extremely important



Business vs. Leisure CONTINUED



Business travelers are more interested in recommendations from hotels

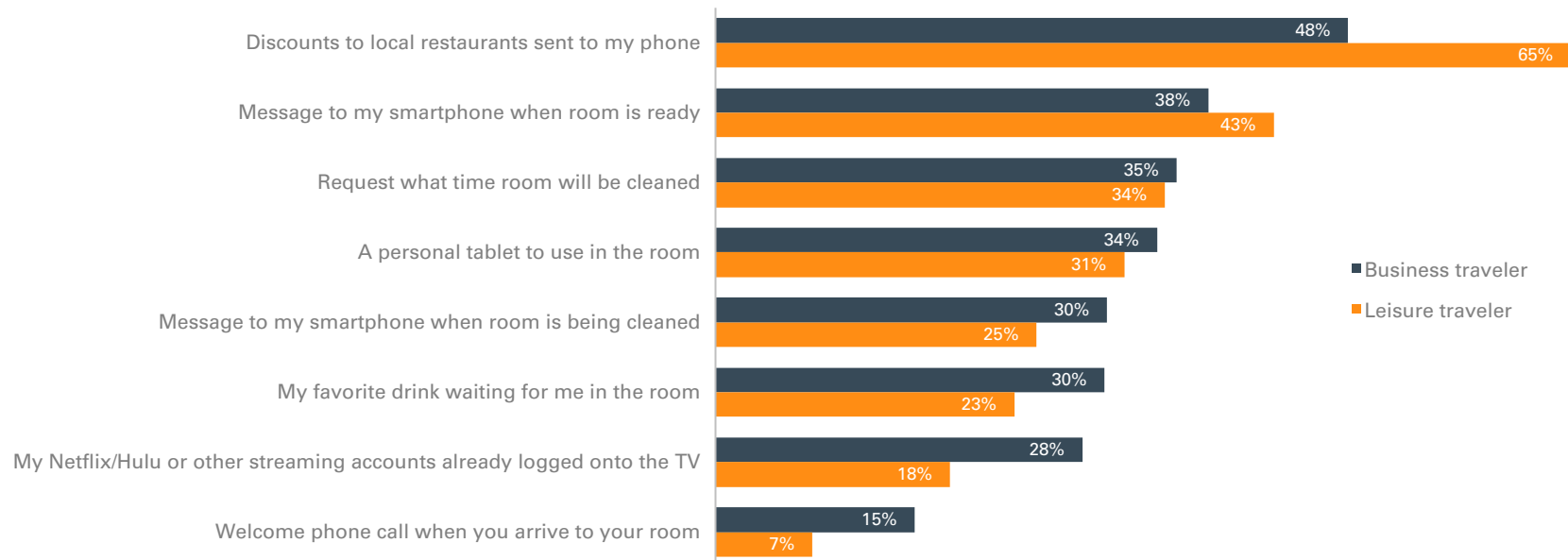


Business vs. Leisure CONTINUED



Business travelers are more interested in in-room/property features, while leisure travelers want to explore the destination

Top Personalized Services/Amenities Desired





Conclusion

KEY TAKEAWAYS
FROM THE RESEARCH:

Guests want more control –
give it to them



Conclusion

KEY TAKEAWAYS
FROM THE RESEARCH:

Become your guests'
confidant and orchestrate
their experience



Conclusion

KEY TAKEAWAYS
FROM THE RESEARCH:

**Know your guests:
Business travelers can be your
most-important leisure travelers**



Conclusion

KEY TAKEAWAYS
FROM THE RESEARCH:

Design and offer apps that are
integral to the hotel experience



Conclusion

KEY TAKEAWAYS
FROM THE RESEARCH:

On social media: applaud your
advocates; consult your critics



Conclusion

KEY TAKEAWAYS
FROM THE RESEARCH:

Embrace technology's
flexibility to best individualize
the guest experience

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