

# Consumer Research Uncovers Travelers' Online Search and Booking Behaviors

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# Executive Summary

Travelers display similar and distinctive behaviors while making booking decisions related to their travel accommodation selection. This study was designed to reveal the possible relevant and important factors affecting the consumer decision process during the main phases of the traveler journey. Travelers' decisions are not only influenced by the factors they are exposed to while searching and booking an accommodation, but also based on primary sources of information derived from previous on-site experiences and post-stay feedback, including online reviews and/or recommendations from friends and family. This study follows the path to decision made by travelers during their accommodation search and evaluation, which play a pivotal role leading to the eventual decision to book.

## Finding show that:

- 91% of travelers turn to search engines when looking for a place to stay with the majority 81% preferring to use Google. "Google Search" is travelers' top most common source of travel inspiration.
- 77% of travelers search keywords relating to accommodation and/or locations. 57% of travelers search for hotels, 49% search for a location, and 31% searching for a combination of the two.
- A hotel's TrustScore, or average review rating score, is the second most important factor affecting the booking decision after a hotel's nightly rate. Furthermore, 88% of travelers sorted out hotels with a TrustScore under three stars, and 32% eliminated those with a TrustScore under four stars.
- Tracing click-through on a Google's hotel listing, travelers are most likely (20%) to click on the direct link to the hotel's website and also very likely (10%) to click on review data provided by TrustYou.

# Method

To further understand the consumer behavior of travelers who are booking accommodation online, a mixed methods approach was developed to electronically survey travelers through heat-mapping click-through observations as well as through a corresponding questionnaire. The objective of this research was to identify the key behaviors travelers share while searching for and evaluating which accommodation they would decide to book.

The sample was drawn from a nationally representative US panel of Internet users from Qualtrics during late 2016. The sample consisted of 920 participants of adults over the age of 18. To take part in the survey, all respondents must have traveled and booked a place to stay online within the past 12 months for business, for leisure, or both.

## Research Design

Participants responded to an online questionnaire concerning habits when booking accommodation. The research was designed to trace the path from the initial search to the selection of an accommodation using Google as the framework for the decision process.

Google is the natural choice to conduct research along the decision journey due to its relevant involvement in the traveler booking industry and its sheer market share in the search engine market.

First, to determine relevant keywords travelers use in their decision processes, respondents were instructed to recall the last terms they used when searching for a place to stay and enter them into a simulated Google search box.

Next, respondents were presented with a sample search result page for terminology relating to *hotels* in a *location*, which contains Google's summarized hotel search unit listing top local hotel results. Following these results, participants were surveyed about their previous experience with similar search results.

# Method

In the following portion of the simulated environment, Google's hotel search full view displays more listings and a map overlay. This environment limited the distinct set of variables which affect travelers' decision to select one particular hotel over another:

- Hotel Name/Brand
- Short Description
- Nightly Rate
- Hotel Star Class
- Review Score
- Image of the Hotel

To observe which of these variables made the most impact, respondents were asked to click anywhere on the page to go further with their research and decision. These clicks were recorded using heat-mapping technology.

Following through the path to purchase, a selection of any one of the hotel listings led to the additional summarized information about one sample hotel curated by Google. Here respondents again used the heat-mapping technology to click on the information they felt was most valuable to the booking decision.

Concluding the series of questions, respondents were asked who had previously used the hotel tools available from Google and if they were confident in making a booking decision from the information provided.

As a result, the mixed methods approach enabled research to be carried out to enable conclusions to be drawn about consumer behaviors, preferences, and actions.

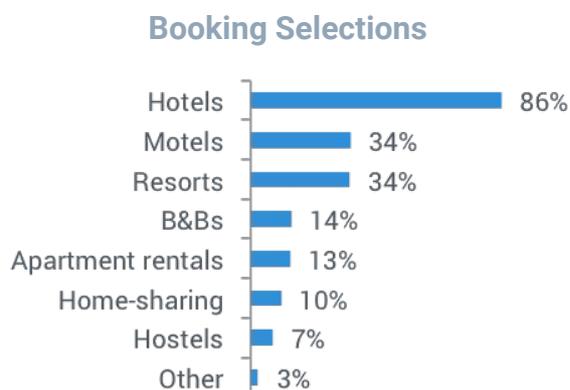
# Profile of Travelers Booking Online

The research sample represents travelers from within the US who have traveled and booked accommodation online within the past year. All respondents indicated they had booked online at least once for leisure, with the average number of bookings made per respondent (71%) having occurred between one and three times.

Additionally, more than half of participants (51%) have identified also having traveled for business within the past year, a 9% increase from the previous year.<sup>1</sup>

## Accommodation Types

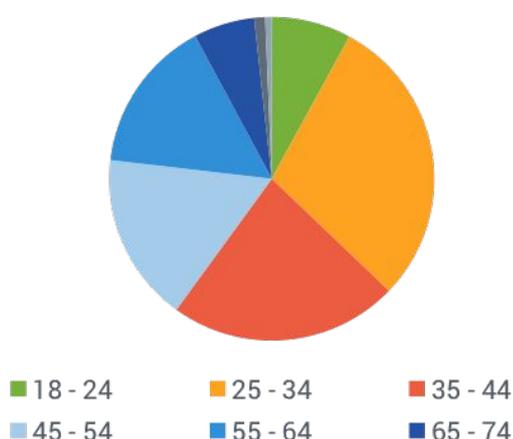
Despite increasingly available alternative sources for accommodation, respondents frequently report booking conventional types of accommodation, with the majority (86%) booking hotels for their stays. The following chart displays the distribution:



## Age and Gender

Respondents were 65% female and 35% male. The following chart represents the age distribution:

**Age Breakdown**



## Household Income

The reported average household income of travelers actively booking was nearly \$70,000, 10% higher than in the previous year.<sup>1</sup>

<sup>1</sup>Consumer Research Identifies How to Present Travel Review Content For More Bookings

# Research Results

## The Search For Accommodation

Research into traveler behavior while searching for accommodation online begins with sources of inspiration that potentially influence the search process, active evaluation, and booking decision. Therefore, respondents were questioned about which sources they find most inspirational. Leading the list, was Google Search, which nearly half (48%) of respondents selected, followed closely by (43%) Booking Engines, and (42%) Facebook.

Ninety-one percent of travelers revealed that they turn to search engines during the search process, with most (81%) preferring Google to aid in their search for a place to stay. These figures confirmed that the use of Google as a framework to make other booking observation proves to be representative of the traveler sample.

When presented with a simulated search engine, respondents revealed many of the search terms they would use when beginning their accommodation search. The results are that travelers were most likely to search term related to *hotels* (57%), *location* (49%), or a combined search including both terms: *hotels* and *location* (31%). Actual terms used are visually displayed in the following word cloud:

## Searched Terms on Google



Respondents were then entered into the simulated situation for search results for hotels in a specific city.

Google algorithms pick-up on these common search terms and may display summarized hotel results within Google's organic search results. Sixty-six percent of travelers confirmed having seen these summarized results in previous searches. The majority of respondents (61%) have also actively used Google's hotel results during their accommodation search.

## Shopping and Active Evaluation

The search for accommodation produces multiple results, and the information that enables travelers to make informed decisions. Travel websites usually limit the decision variables based on what is most important to the traveler. After selecting a location, further decision variables are

# Research Results

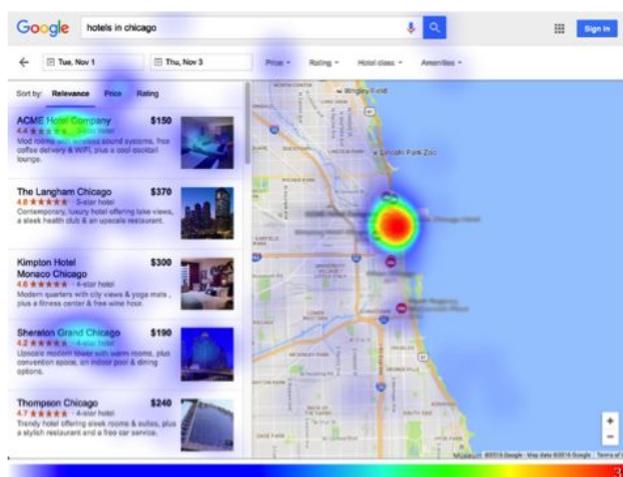
often given alongside the hotel's offer across multiple travel sites to provide necessary information. Participants ranked these variables in order of importance, and revealed that a hotel's price is the most important, followed closely by the hotel's rating and hotel class.

**Ranked Top Decision Variables**



Furthermore, through heat-mapping and click tracking as shown in the following graphic, respondents indicated where they are most interested to click next when searching for a place to stay.

**Travelers' Click Behavior**



Thirty-two percent of travelers were likely to seek more information by clicking/zooming in on the map, while the majority of travelers (60%) were likely to click on one of the hotel listings.

When asked further questions about how respondents were likely to sort their results, the majority (88%) would sort for hotels with a good review score of 3-stars or higher, and many (33%) would sort for an excellent review score of 4-stars or more.

The following step in the simulation led travelers to a simulated hotel listing on Google where the highest quantity of clicks (20%) would drive guests directly to the hotel's website, many (11%) would look for further images, and there was also a tendency (10%) for travelers to interact with review scores and summarized review data.

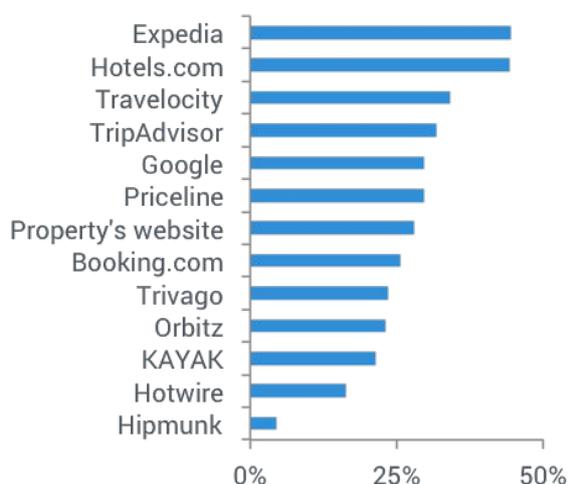
# Research Results

## The Decision to Book Online

All of the respondents have booked a place to stay online in the past 12 months. Leisure travelers, the majority (85%) of whom report performing the booking themselves, also suggest that some (19%) of accommodation bookings were booked by significant others, (15%) other family members, (8%) friends, with the least amount (7%) of bookings having been performed through travel agents.

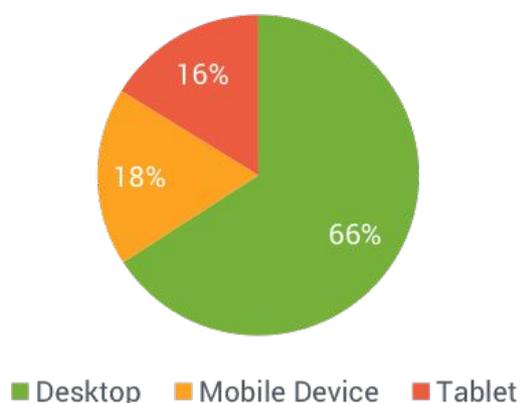
Ninety-three percent of respondents reported that they use hotel booking engines and 84% reported to using meta-search engines during their search process. The following chart shows many of the frequently used methods, of which travelers use to book their accommodation online.

### Preferred Booking Channels



Search and evaluations are made across multiple devices; however, there remains a high likelihood that travelers will perform their booking online from a desktop device .

### Preferred Device Used to Book



# Conclusion

Despite the intricacies of an individual traveler's journey to decision, there exist similarities in the online search and booking process. Gathering insights benefits hoteliers and travel intermediaries and encourages smart strategic decisions based on consumer behavior. Ultimately, the multiple insights revealed through traveler preferences and behaviors help support and encourage the online booking industry's efforts to improve the traveler's decision experience.

There are many online paths each traveler will follow before finally making a booking decision. This research explored many of the commonalities between the different paths of each individual traveler. This research reaffirms the importance of a hotel's presence on search engines, where travelers seek inspiration and also begin their accommodation search. Additionally, many travelers use Google's hotel results in some form and value these tools when searching for their accommodation.

The results also define characteristics of those who make booking decisions online, where, how, and by whom these bookings are performed, and which variables are the most valuable when considering accommodation alternatives.

## Further Implications

Based on these findings, hoteliers must consider their presence on Google within their strategies. The majority of travelers turn to Google when seeking travel inspiration, beginning their accommodation search, and evaluating features between multiple hotels. By optimizing a hotel's presence on Google, more information is available that would likely drive travelers to your website and also to book direct.

Furthermore, travelers place a very high importance on hotel reviews, which in the case of Google are provided in part by TrustYou. TrustYou collects over three million guest reviews, surveys, and social posts published across the web, every week, for 500,000 hotels. Eighty-eight percent of travelers want to filter their results to only book hotels with review scores of three or more stars, and thirty-two percent only want to book hotels with review scores higher than 4 stars. Therefore, increasing a hotel's positive review count is of major importance to the success of a hotel's online bookings.

# About TrustYou

TrustYou, the world's largest guest feedback platform, provides hotels with insights to improve their guest experience and market to future guests. Guest feedback influences 95% of booking decisions. TrustYou's guest feedback platform incorporates hundreds of millions of hotel reviews, surveys, social posts as well as direct messages sent through SMS, email, Facebook Messenger, and more. Along each step of the guest journey, this information generates actionable insights for 500,000 hotels to improve their presence along each step of the guest journey, from booking and pre-stay search queries, to real-time guest requests and messages, to post-stay feedback in the form of survey responses and reviews. TrustYou's platform is made up of various components including: [TrustYou Meta-Reviews](#)<sup>\*</sup>, verified global review summaries displayed on travel and search sites like Google, KAYAK, and Hotels.com; [TrustYou Messaging](#), real-time guest messaging service; [TrustYou Stars](#), advanced guest satisfaction survey tool; [TrustYou Analytics](#), the world's leading online reputation management tool and the accompanying app [TrustYou Radar](#). Additionally, PMS, CRM, IBE and other hotel software providers benefit from [TrustYou Connect](#), the partner program which integrates TrustYou's guest feedback platform into their products to help their hotel clients to positively influence every stage of the guest journey.

Find more information on TrustYou and the guest feedback platform on [www.trustyou.com](http://www.trustyou.com).