

HOTEL TRAVEL TRENDS

We looked at:

Which destinations are gaining popularity?

How far in advance do travelers book by destination?

How many searches do they make?



Our key findings include:

More than one in three travelers to **New Orleans, Las Vegas, Orlando and Washington DC** booked hotels more than **30 days** in advance.



More **price conscious 20-29 year-olds** conduct roughly **10 searches** prior to booking hotels.



More **exotic destinations** focused on holidays have a **higher number of searches** than more business-focused destinations.

Trends in hotel bookings by market

Growth markets* (year over year rankings)



Philadelphia



New Orleans



Boston



Miami



Anaheim



Pittsburgh

+ not in the top markets in 2015 *non-gaming metropolitan markets

The top destinations for hotel bookings were consistent between the 1st half of 2015 and 1st half of 2016. However, we saw several destinations grew in popularity, year over year, including the City of Brotherly Love, New Orleans, Boston and Miami. As of 2016, Anaheim and Pittsburgh are both also in the list of top 30 markets for hotel bookings.

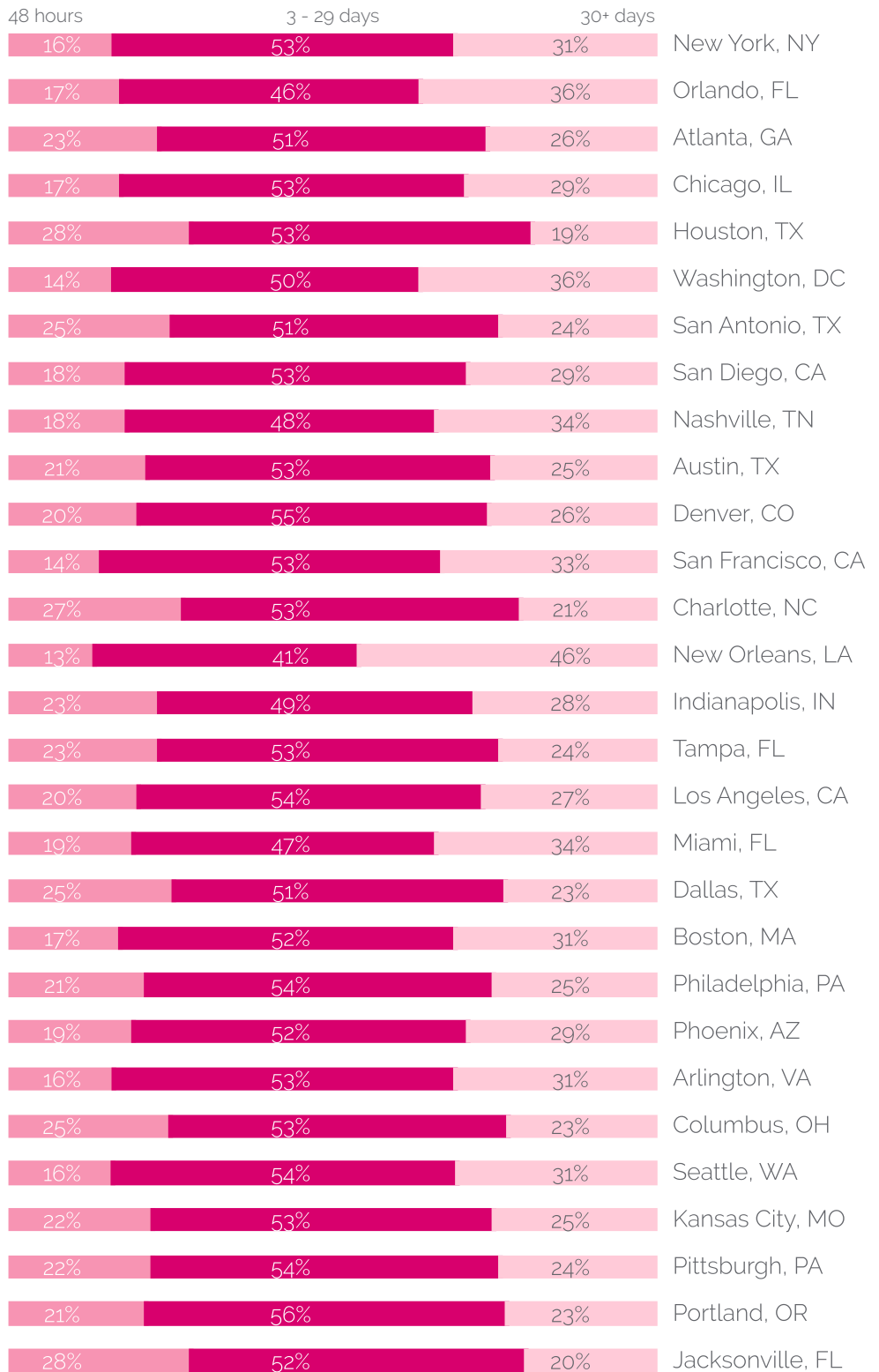


Advance hotel bookings

Over one in three travelers to New Orleans, Las Vegas, Orlando and Washington DC have booked hotels more than 30 days in advance (and fewer than 15% booked less than 48 hours in advance). These are all key cities for conventions and holiday travel.

On the other hand, one in four travelers to Houston, San Antonio, Dallas, Columbus Jacksonville and Charlotte booked hotels within 48 hours of travel.

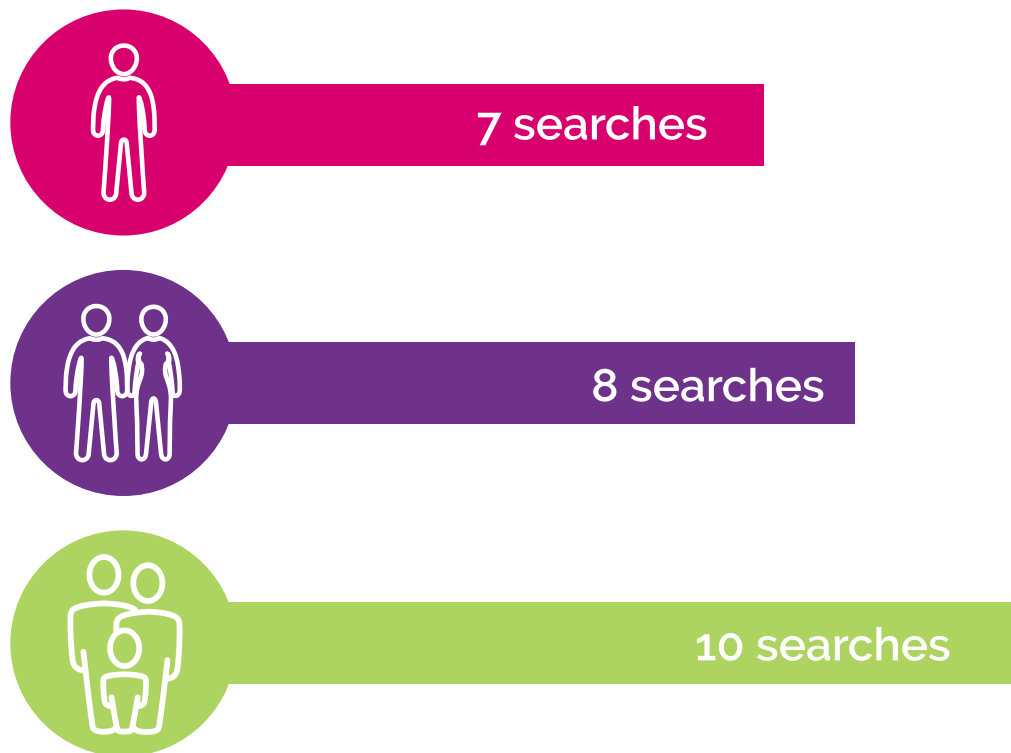
% of hotel bookings by timeframe before travel



*non-gaming metropolitan markets

Average searches prior to hotel bookings

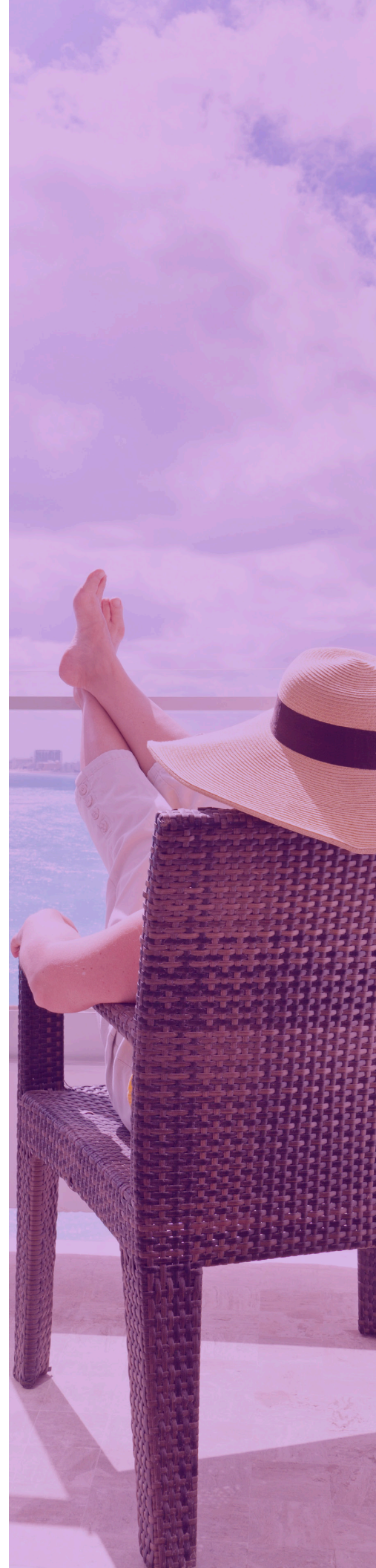
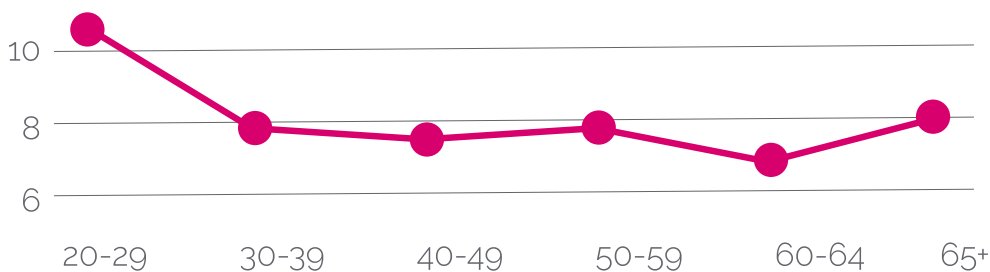
The number of travelers tends to correlate with the number of searches prior to booking



Younger travelers, on average, search more prior to booking hotels.

Travelers 20-29 are more resourceful and price conscious, conducting 10 searches on average prior to booking a hotel. We also see a slight uptick for retirees over 65, conducting on average eight searches prior to booking a hotel.

Average # of Searches Prior to Booking Hotel



More exotic locations warrant additional searches

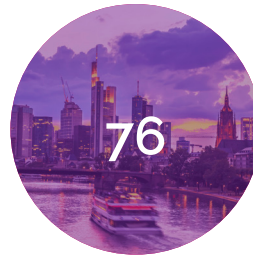
Index share of searches/share of bookings



Unsurprisingly, destinations which tend to be focused on holiday travel have higher searches on average. Hotels in the Caribbean represent over 1.3% of all hotel searches, but only 0.5% of bookings showing an index of 267 searches/bookings. In contrast, the share of bookings to Frankfurt is actually higher than the share of searches.



Caribbean



Frankfurt



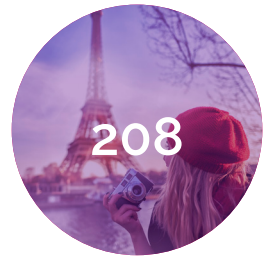
London



Madrid



New York



Paris



Rome



San Francisco



Washington

Key Takeaways

- Several markets grew in popularity for hotel bookings from 2015 including Philadelphia, New Orleans, Boston and Miami.
- There is large variability in advance booking for hotels depending on the popularity of the destination (especially for conferences and family vacations).
- Those traveling with families, as well as travelers 20-29 have a higher number of searches prior to booking. More exotic destinations have a higher share of searches compared to bookings.



Source: ADARA search and booking data for travel in H1 2015 and H1 2016

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