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1. Executive Summary

Hotels have different channels to generate revenue. By 2016, online bookings are the main driver of reservations and therefore room revenue. Online Travel Agencies (OTA) generate the majority of these bookings but they have disadvantages for hotels: large commissions, and little control over differentiation, the criteria the hotel is compared to its competitors. The online footprint of a hotel also covers its positioning in search engine results, in social media networks and on its website. The majority of visits to a hotel website are targeted searches that look up a hotel directly. This study investigates how 200 hotels in Central America position themselves in these channels to communicate with the potential guests and drive sales.

One of the main findings of this study is that hotels do not take advantage of the free tools available to them to increase visibility in search results or social media networks. For example roughly 2 out of 3 hotels have not claimed their Google Business profile, missing a significant opportunity to pull the visitor to their online presence. Only 92% of the hotels own or operate a website, 60% are multi-lingual and only 72% of these hotel websites are free of errors. The fact that mobile device usage has surpassed the use of desktop devices is mainly ignored by hotels, as only about half of their websites is mobile friendly.

Another relevant learning is that if a hotel is not competing for top ranking in organic, or paid, search results, the Online Travel Agencies are. TripAdvisor and Booking.com are the two OTAs that show up as top organic searches by hotel names and when adding Expedia, the three are the top bidding paid ads for paid search results on hotel names. The hotels are forfeiting a commission-free reservation by not applying simple marketing practices. If only 20% of the reservations can be generated as direct bookings through the own website or phone number, the hotel can boost profit by 10%.

When it comes to hotels presenting themselves on Facebook Business profiles or on their website, many hotels neglect these channels to interact with potential and current guests, with Facebook pages being unclaimed by 11% of the hotels; and of the ones that did, only 60% post updates at least twice a month. Ironically about 25% of hotels do not post their email addresses on their website due to spam concerns, while almost all of them post it on the Facebook page.

To provide a holistic, while abstract, overview of the individual countries a weighted index, the Online Performance Rating (OPR) provides a rating from 0 to 100 on how well the hotels position themselves online to interact and sell to guests through the internet. While not a single hotel achieved a rank of 100 (meaning, no hotel is deployed all best practices), the best rank achieved was 97 (by two Nicaraguan hotels: Casa Bahia Hotel and Yemaya Island Hideaway).

2. Method and Assumptions

This study investigates how hotels are presenting themselves to targeted searches by online visitors, for example targeted searches in Google for one specific hotel, also in combination of the hotel name and the location, like “four seasons resort costa rica”, or by targeted searches for the hotels Facebook profile from search engines or searches within the Facebook search tool for the hotel name.

Appearing in these searches is essential for a hotel, especially as these searches may yield competing hotel names or links in the search results – a targeted visitor may be lost to links to another hotel. Appearing with the top of the search results is a necessity and provides additional benefits:

- Low to no cost of customer acquisition
- More revenue due to more bookings
- Higher customer satisfaction
- Increased customer lifetime value

Having a presence in search engine results pages (SERPs) and within Facebook is not enough. The actual website and/or the Facebook hotel profile page have:

- To cater to the visitors’ informational needs and
- To convert the visitor into an email, or
- To convert the visitor into a phone call,
- To convert the visitor into a return visitor,
- To convert the visitor into a hotel guest,
- To convert the visitor into a returning guest or
- To convert the visitor into a referral to new potential guests.

It is essential to point out that these items are representing only a fraction of the online marketing needs of a hotel. While a majority of the hotel websites’ visitors originate from targeted visitors, the online revenue does not. Online revenue is mainly determined by the hotels positioning in online travel agencies (OTAs). This positioning is a mix of customer reviews, room rates, commission rates, content scores and additional factors like competition within these OTAs and weighted factors like other hotel’s availability, time and promotions.

This study only evaluates the targeted visitors and does not include the hotels efforts of positioning themselves within OTAs. While it is established that these factors currently do not generate the main online revenue for the hotels, it is imperative to address the non-OTA Online Presence as neglecting these will translate in a loss of revenue for hotels.

This study includes 200 hotels from South Central America, including the islands Big Corn Island, Little Corn Island, San Andrés, Providencia (and therefore also Colombia,

South America). From each major region the study picked 10 of the most popular hotels.

The popularity of the hotels was determined by manual selection of the available hotels in the area through consideration of their respective performance in the main OTA websites booking.com, expedia.com, hotels.com, hoteles.com as well their relative popularity in TripAdvisor for their respective area.

The factors analyzed for this study are

- presence in SERPs,
- completeness of Google Business listings (also known as Google Places),
- presence in Facebook,
- completeness and currentness of Facebook profiles,
- hotel website completeness and currentness
- availability of contact channels to connect with the hotel through the website

The individual factors are further explained in the individual chapters with examples and screenshots where applicable.

Assumptions made for this study are:

- Google is the most popular search engine in the United States
- Each hotel targets the US market
- Each hotel can claim ownership of their Google business profile
- Each hotel can engage in PpC (paid listings) for their business name in SERPs
- Each hotel can claim their Facebook profile
- Each hotel can maintain their Facebook page twice a month
- Each hotel has control over the contents of their website directly or indirectly
- Each hotel controls the quality of photos that are displayed on their website
- The evaluation of each hotel was a snapshot in time and does not include any changes applied to the online presence or profiles after mid May 2016
- Any Adwords ads were a snapshot in time and rankings for the same day or internet user profiles may differ

Each hotel has been reviewed on 19 individual criteria. The main results will be shared on a cumulative level for all hotels and on a country level. The 10 criteria have also been aggregated to one complete score (Online Performance Rating, OPR) for each hotel with weight factors being included.

For example the OPR score takes into account that, it is much more important for a hotel website to rank **well** in the search engine result pages (SERPs) than to rank **first** in the SERPs. Or for example, it is more important to have an email address listed on the hotel's website than a link to the hotel's Facebook page. While all these factors are important, they are not equally important.

The weighing of these factors subjectively and may be argued. The final score of each hotel in this study may therefore be subjective; however the individual criteria applicable to each hotel are objective and may be verified as public information.

Lastly, the assumption about the benefit of hotels benefiting from converting targeted searches into direct bookings rather than letting OTAs handle the order is:

- Hotel A generates \$1,000 in room revenue. 100% of this revenue came through an OTA; therefore the commission is 20% or \$200. The cost for the room is \$400, leaving \$400 profit.
- Hotel B generates \$1,000 in room revenue. 80% through an OTA, 20% through direct bookings. The commission to the ORA is 20% or \$160. The cost for the room is \$400, leaving \$440 profit.
- Hotel B has generated 10% more profit by converting visitors directly.

There are more factors to the profit, but this calculation shows the immediate impact on the bottom line.

3. Performance in Search Engine Result Pages

Search Engine Result Pages (SERPs) provide can provide a lot of information about a property without the user having to click on a single link. This study only focuses on the search engine Google, assuming it is the most popular search engine. There are four key elements to the Google SERP each hotel should address:

1. Google business profile listings
2. Paid search results
3. Organic search results, with subcategories

3. 1. Google Business Profile listings

The Google Business Profile listing appears next to the search results (if the screen width permits) and contains valuable information that may provide potential guests several means to connect with the hotel:

- Full name
- Location on map
- Professional Photos
- Website Link
- Directions (map location with driving instructions)
- Hotel Star rating
- Review count
- Average review 1 – 5 stars within Google reviews
- Short description
- Phone number with country code
- Address
- Link to an Online Travel Agency (if paid through Google Adwords)

These items may satisfy the customer online search entirely without having to click any further. A business can claim their business listing within Google for free. Once the legitimacy of the claim has been verified, the business can add or edit the information displayed.

The business profile does not have to be claimed to add or edit parts of the listing. The link at the bottom of the profile 'Suggest an edit' allows internet users to edit an unclaimed listing with limitations. However, an unclaimed but complete business profile is better for a business to convey information than an unclaimed and incomplete profile.

Below is an example of a claimed business profile.

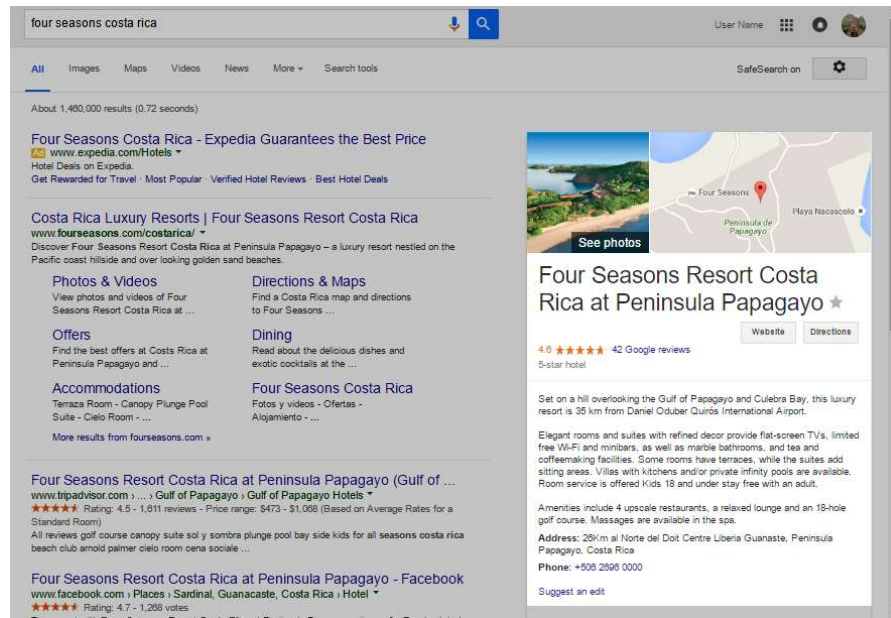


FIGURE 1 GOOGLE BUSINESS PROFILE IN SEARCH RESULT PAGE

The analysis of 200 hotels shows that only 74 (37%) of all hotels had claimed their business profile with Google.

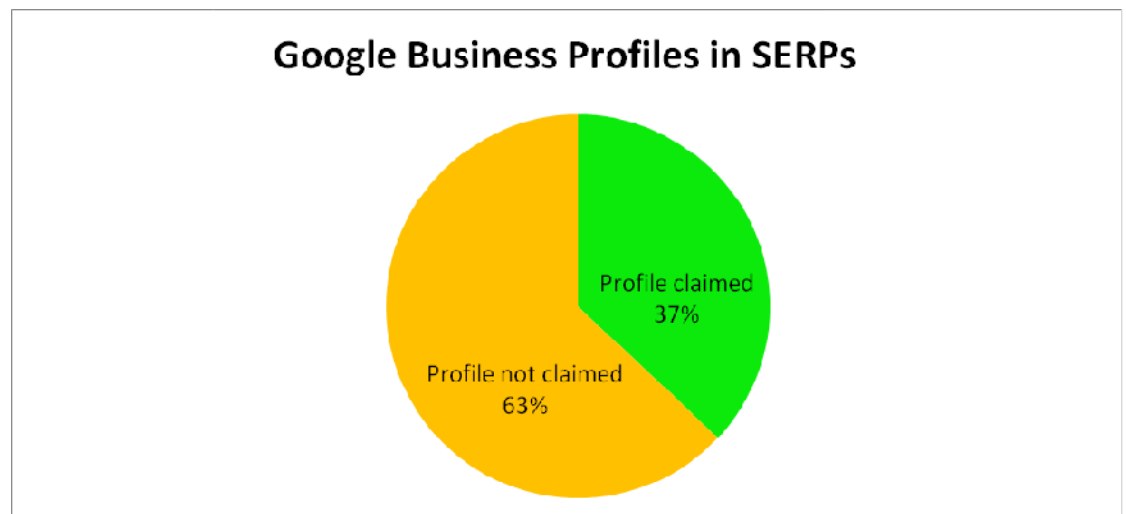


FIGURE 2 PIE CHART SHOWING HOTELS THAT CLAIMED GOOGLE BUSINESS PROFILE

As indicated above, not having claimed the business profile, does not exclude the business from providing contact information.

In one case, a competitor has knowingly or unknowingly claimed the website link to one of the hotels audited in this survey. This underlines the importance for a hotel to actively manage its Google Profile.

Out of 200 hotels, 165 have their web address listed in the profile and 185 have their phone numbers listed.