



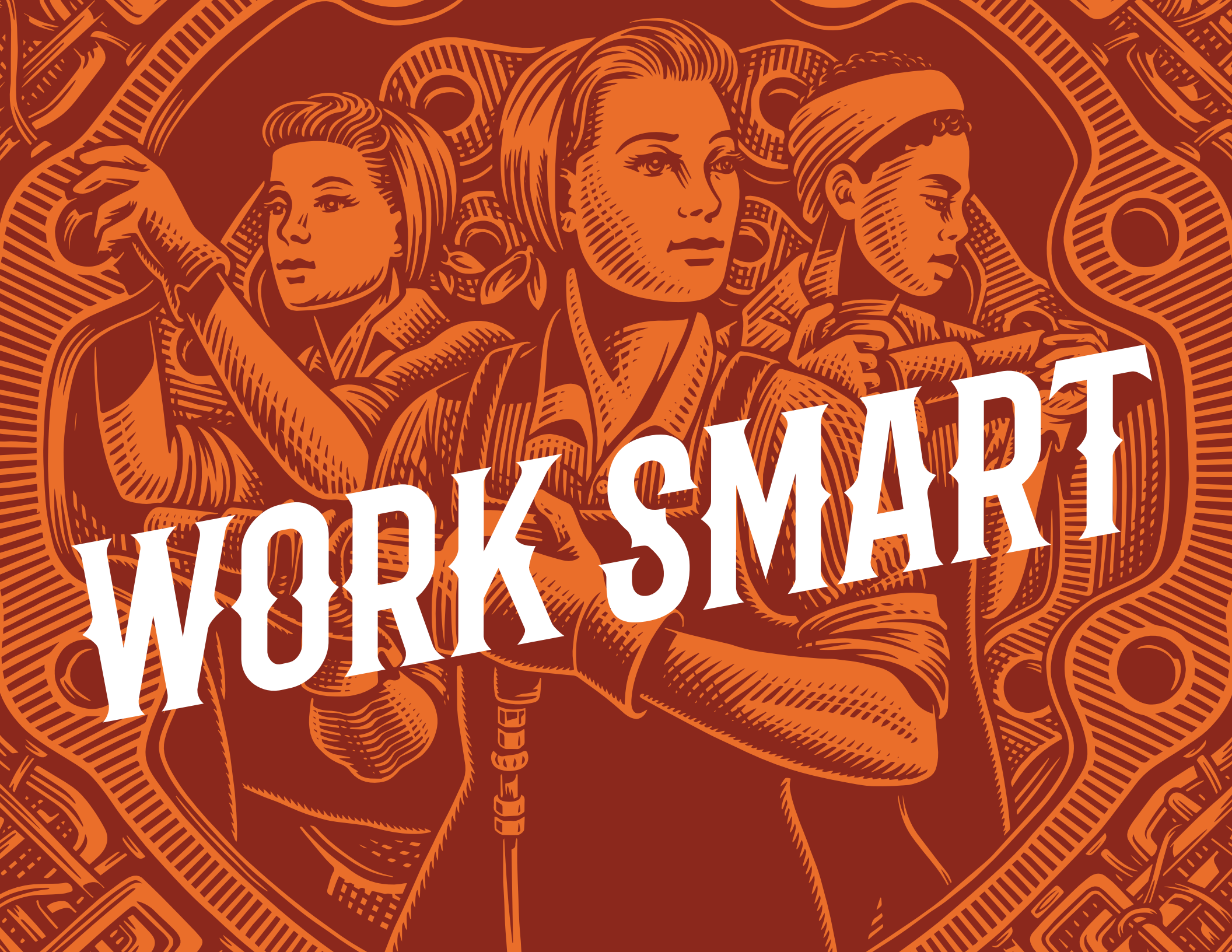
2019 Southwest Hospitality Marketing Report Consumer Perceptions & Attitudes

LAVIDGE



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WORKSMART

Introduction

LAVIDGE has more than 35 years of experience with clients in the hospitality industry such as Sanctuary Camelback Mountain, Wigwam, JW Marriott Desert Ridge Resort & Spa, Arizona Grand Resort, Gainey Suites Hotel (now Sonesta Suites), Enchantment Resort, and more. Our work runs the gamut of marketing communications—from branding campaigns and website design to advertising and sales promotions, to public relations and social media.

In other words, we understand that in the travel and hospitality industry, putting heads in beds is important.

But so is enticing guests to use more of a property's amenities. Whether it's increasing spa appointments or tee times, dinner bookings or group business, wedding reservations or weekend getaways, our people know hospitality.

At LAVIDGE, being experts in hospitality means knowing how to reach travel professionals, meeting planners, and business as well as leisure guests looking for a luxury resort or conference hotel, an international chain or an independent hideaway.

We also recognize hospitality is big business, and through 2020 it's only going to get bigger. Already a nearly \$70 billion industry, U.S. domestic travel increased 1.9 percent from 2016 to a total of 2.25 billion person-trips in 2017. [Performance for hotels and resorts outpaced expectations](#) in 2018, leading STR and Tourism Economics to predict continued strong growth. The industry known for 10-year cycles hasn't experienced a downturn since 2010. True to historical patterns, trends suggest continued prosperity through 2020. Even then, predictions point to continued growth, although the pace might slow.

PROJECTED HOTEL & RESORT PERFORMANCE IN 2019

	2018	2019
Occupancy	66.2% (+0.4%)	66.2% (+0.1%)
ADR	\$129.74 (+2.5%)	\$132.74 (+2.3%)
RevPAR	\$85.89 (+2.9%)	\$87.93 (+2.4%)

Source: STR and Tourism Economics



ESTABLISHING DEFINITIONS

The U.S. Department of Labor's Bureau of Labor Statistics combines leisure and hospitality under a single supersector consisting of [Arts, Entertainment, and Recreation](#) and [Accommodation and Food Services](#). For the purposes of this report, we focused our research more heavily on hotels and resorts, in part because we've previously published a report on the Food Services industry. We've included preferences for eating establishments and tourism-related entertainment, arts and recreation as they pertain to marketing various types of accommodations.

Our research takes into account how the North American Industry Classification System identifies industries in the Accommodation subsector as those that provide lodging or short-term accommodations for travelers, vacationers and others. This takes in a wide range of establishments, the BLS site states, noting that some provide lodging only while others provide meals, laundry services and recreational facilities, as well as lodging.

GROWTH TO SLOW, NOT STOP

PricewaterhouseCoopers noted in November 2018 that ***"Occupancies may have peaked, with flattening or slight declines on the near horizon. Room rate growth remains the key to above inflationary RevPAR increases through 2019."*** The PwC *Hospitality Directions US lodging outlook* further states that ***"IHS-Markit economists look to continued growth in GDP for the remainder of 2018 and through 2019,***

with slowing growth in 2020. Currently, the economy is supported by nearly 'full employment,' strong business and consumer sentiment and employment growth. The economists at IHS-Markit point to rising interest rates, increasing inflation, and diminishing fiscal stimulus to slow economic growth by 2020."

In addition, according to the PwC report, ***"New tariffs on Chinese imports (\$200B) may also continue to raise inflation above the Fed target of 2.0 percent and ultimately slow economic growth. IHS-Markit expects continued upward pressures on inflation due to the tightening labor market, as well as increasing trade tensions and new tariffs on various Chinese imports. Through 2018, inflation is expected to continue just above 2.0 percent."***

PwC adds that IHS-Markit economists estimate solid fixed business investment, increasing 7.0 percent in 2018 and slowing to 4.8 percent in 2019. Our lodging commentary highlights continued increases in corporate transient and group demand through 2019, due in part to solid fixed business investment.

Overall, IHS-Markit economists anticipate GDP will grow at a rate of approximately 3.1 percent in 2018, measured on a fourth-quarter-over-fourth-quarter basis. Estimated 2019 GDP growth slows to 2.5 percent, PwC reports state.

US OUTLOOK

	2015	2016	2017	2018	2019
<i>Demand growth</i>	2.5%	1.5%	2.5%	2.4%	1.9%
<i>Supply growth</i>	1.0%	1.5%	1.7%	2.0%	2.1%
<i>Room starts, % change</i>	13.4%	15.0%	-1.9%	1.7%	10.9%
<i>Occupancy</i>	65.4%	65.4%	65.9%	66.2%	66.0%
<i>... % change</i>	1.5%	0.1%	0.8%	0.4%	-0.2%
<i>Average daily rate</i>	\$120.38	\$124.02	\$126.71	\$129.94	\$133.86
<i>... % change</i>	4.5%	3.0%	2.2%	2.5%	3.0%
RevPAR	\$78.69	\$81.13	\$83.52	\$85.96	\$88.40
... % change	6.1%	3.1%	2.9%	3.0%	2.8%
<i>GDP, % change Q4/Q4</i>	2.0%	1.9%	2.5%	3.1%	2.5%
<i>Inflation, % change</i>	.3%	1.1%	1.8%	2.1%	2.1%

Source: STR; Bureau of Economic Analysis; IHS-Market (forecast released October 2018); MHC Construction Analysis System, PwC

CHAIN SCALE OUTLOOK, PERCENTAGE CHANGE FROM PRIOR YEAR

	2018					2019				
Chain scale	Demand	Supply	Occupancy	ADR	RevPAR	Demand	Supply	Occupancy	ADR	RevPAR
<i>Luxury</i>	2.4	1.9	0.5	3.7	4.2	1.0	1.1	(0.1)	4.0	3.9
<i>Upper upscale</i>	2.9	2.5	0.3	2.0	2.4	2.1	2.3	(0.2)	2.8	2.6
<i>Upscale</i>	5.0	5.5	(0.5)	1.7	1.1	4.8	5.2	(0.4)	2.4	2.0
<i>Upper midscale</i>	4.6	4.1	0.5	1.5	2.0	4.2	4.0	0.2	1.8	2.0
<i>Midscale</i>	2.0	1.0	1.1	1.9	3.0	1.1	1.0	0.1	2.0	2.1
<i>Economy</i>	(0.0)	0.0	(0.1)	2.6	2.5	(0.5)	0.2	(0.7)	2.0	1.3
<i>Independent hotels</i>	0.5	0.1	0.4	3.3	3.7	(0.2)	0.6	(0.7)	4.1	3.3
US total	2.4	2.0	.4	2.5	3.0	1.9	2.1	(.2)	3.0	2.8

Source: PwC, based on STR data

TECHNOLOGY INSPIRES ADAPTATIONS

Everyone has become aware of home-sharing programs such as Airbnb which allow travelers to hop off-site for smaller trips within their stay at your property. What you might not know is that some hoteliers are learning to integrate arranging home sharing for these types of stays as a concierge service, much the same way they might set up ride-sharing services (Uber, Lyft) for off-site activities. This way, while guests are away from their primary location, they will be more likely to return after their side trip. It's just one of the ways the industry is adapting to ever-advancing technology.

Since early 2018, boutique hotels and select B&Bs have been eligible to apply for the opportunity to sell to [Airbnb customers](#) through third-party channel managers such as SiteMinder and HotelRunner. The disruption of home-sharing services has prompted one hotel brand, Marriott, to offer [private homes guests can book](#)—right from the same website they would use to book any other Marriott accommodation.

AI IS THE FACE OF THE FUTURE

No industry is unscathed when it comes to technological advances and how it changes the way things are done. Hilton is among hotel groups which already offer a digital check-in where guests can select a guest room and input a credit card to receive a room key digitally that will open the door to their guestroom.

One of the newest such influences in the hospitality industry is facial recognition software. While it's not exactly mainstream, [Shiji and Fliggy](#) have introduced the industry's first complete facial recognition hotel payment and check-in hardware and

software solution. It launched with 50 hotels in the Hainan district of China.

"Our aim with this project has been to find ways for hotels to increase guest satisfaction by reducing wait times as much as possible. Working with Fliggy and our partner hotels have made this a success and we're monitoring privacy and efficiency closely to develop ways to increase this across more hotels," Kevin King, COO of Shiji Group, announced in a statement released Sept. 11, 2018. "As a guest makes a reservation on Fliggy, the guest's information is processed through Shiji Distribution Solutions to the hotel's

property management system leveraging Shiji's deep integration of hotel solutions. When the guest arrives at check-in, they simply scan their ID on the kiosk. The new solution then verifies the ID against the Public Security System, performs a credit authorization and produces the room card."

Time will tell whether face-recognition technology will expand and which companies will be among the first to deploy it in the United States. Perhaps one will be yours.

READY FOR HOSPITALITY ON-THE-GO?

This concept isn't quite ready for prime time, but it is definitely peeking over the horizon: Autonomous Travel Suites. The combination vehicle/guest room is an offshoot of autonomous ride-sharing services such as Alphabet Inc.'s [Waymo](#) self-driving car service which launched in Phoenix, Ariz., in early 2019. Like Waymo, no driver is required. Unlike Waymo, Autonomous Travel Suites offers hotel rooms on wheels which take occupants where they need to go.

"The driverless, mobile suite will offer door-to-door transportation service in between the traveler's home and destination," [Hospitalitynet.org](#) reports. "Within a compact hotel room environment, the suite is equipped with basic sleeping, working and washroom functions, allowing the guests to use their travel time more efficiently and productively."

FAMILIES, EXPERIENCES, FULL GROWTH TRENDS

Families have dominated travel growth for the past seven years. Multigenerational travel was the watchword for 2018. Beginning in 2019, however, look for adults-only trips to lead the way among consumers. In an industry where the majority of bookings are for business travelers, adding consumers as another target audience could lift your overall room nights. That's because our research confirms that 61% of consumers who book hotel rooms do so because they are on vacation as opposed to taking a weekend trip or traveling for business. Additionally, 72% of those who responded to our survey noted having children, working full time—or both. There's definitely a market here to be tapped.

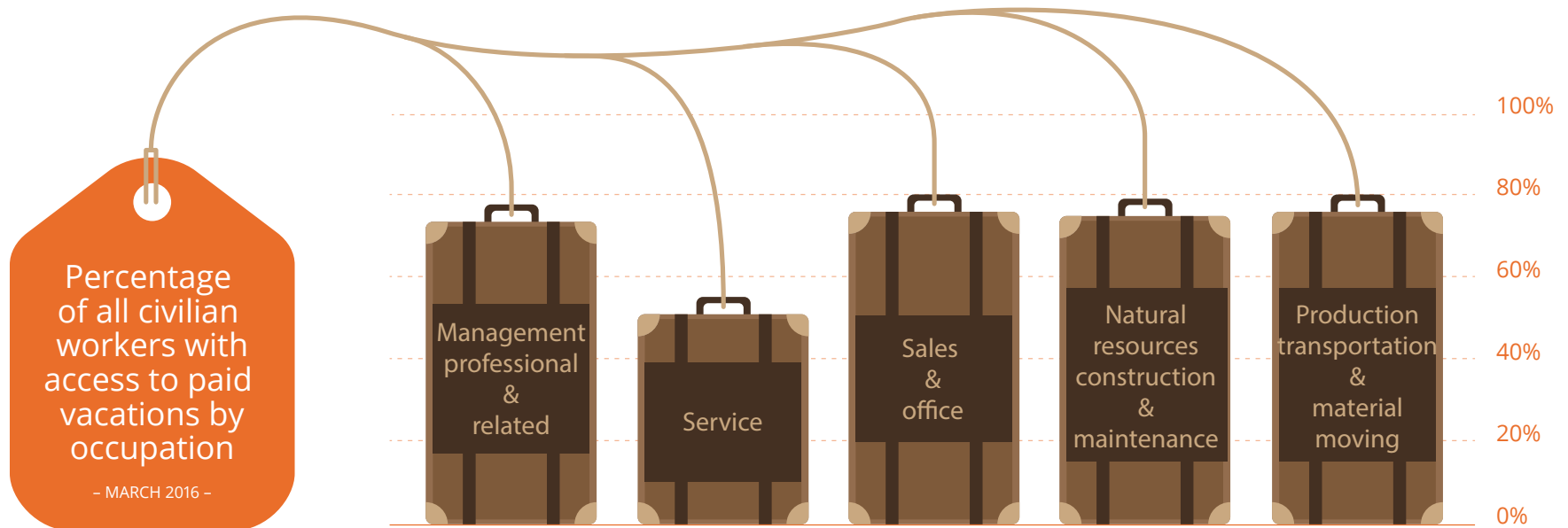
EMPLOYERS ENCOURGE WORKERS TO TAKE TIME OFF

While our study specifically refers to overnight stays, statistically it makes sense that those on vacation are more likely to book multiple nights, even if they are not all at the same location.

That's because the U.S. Department of Labor's Bureau of Labor Statistics reports that the average American worker has between 10 and 20 days of paid vacation per year, depending on the size of their employer, years of service with them and whether they are employed in the private or public sector. On average, workers enjoy 10 days of paid vacation after a year of service, with an additional five days after five years of service, 17 days after 10 years and 20 days after 20 years.

The type of work done also plays a role in how much access workers have to paid time off from work outside of sick days and holidays.

In March 2016, 73 percent of all civilian workers had access to paid vacations. More than three-quarters of workers in sales and office jobs (80 percent); production, transportation, and material moving jobs (80 percent); natural resources, construction, and maintenance jobs (79 percent); and management, professional, and related jobs (76 percent) had access to paid vacation time. Just over half of workers in service occupations (55 percent) had access to paid vacations.



Source: U.S. Bureau of Labor Statistics

FEW TAKE FULL ADVANTAGE

Just because the majority of the workforce has access to vacation time doesn't mean it gets used. The U.S. Travel Association's "State of American Vacation 2018" report found while the number of vacation days taken in 2017 was the highest since 2010, workers used an average of 17.2 days. Of those, only eight days were set aside for travel.

The report, part of *Project: Time Off*, further estimates unused vacation time from last year represents **\$255 billion in missed economic opportunity** with the potential to create 1.9 million jobs.

Clearly, there is room within the hospitality industry for growth. And it doesn't begin with convincing vacationers to choose a particular brand. You first need to convince them to use their vacation so they have a reason to compare options.

For a variety of reasons, including workplace culture, heavy workloads and a belief that no one would be available to cover their absence, more than half of Americans let some of their vacation time expire each year. Nearly one-quarter of all workers haven't taken a vacation for more than a year. A full 12% haven't taken a trip in three years. This sharply contrasts with statistics collected between 1978 and 2000 when U.S. workers took on average 20.3 vacation days each year, the report further states.

OPPORTUNITY ABOUNDS

Even so, there is good news. The trend to use vacation time has risen in recent years, with fewer employees reporting unused time accounting for 55% in 2015, 54% in 2016 and only 52% in 2017.

There's definitely money to be made by convincing U.S. workers to cash in on relaxation by actually using their time off to take a trip. Even small incremental gains can be significant.

"The increase in vacation usage from 16.8 to 17.2 days delivered a \$30.7 billion impact to the U.S. economy," the "State of American Vacation 2018" report further notes. "It also produced an estimated 217,200 direct and indirect jobs and generated \$8.9 billion in additional income for Americans."

The good news doesn't end there. The U.S. Travel Association in 2018 announced that two of the nation's top-three states in terms of vacation days taken each year are located in the Southwest. Colorado ranks first with 20.3 days, and Arizona ranks third overall with 18.8 days (just slightly less than Virginia which ranks second with 18.9 days).

Even better news is that 72% of travelers still prefer taking a traditional weeklong trip over a long weekend, giving hospitality-related businesses plenty of opportunities to vie for their travel and entertainment dollars.

And as if that wasn't enough, [Travel Weekly](#) reported early this year that growth in family bookings has outpaced non-family sales since summer 2012, with the sector accounting for almost 40% of summer bookings compared with just over 20% of winter sales. In fact, family hotel bookings were the driving force behind summer sales in 2018, rising double that of non-family sales, according to the *Travel Weekly* report. In addition, most bookings were for seven to 14 nights, with the former up 15% year over year and the latter down 7% during the same time period.

THERE'S MORE TO THE STORY

Of course, taking a family vacation is far from the only reason people travel, and certainly not the only reason to stay in a hotel or resort. Other reasons our study respondents reported include:

- Weekend or short trip – 44%
- Visit family/friends – 40%
- Staycation – 10%
- Business trip – 9%

Additionally, our consumer research identified preferences of multiple subsets within the overall sample. Let's take a closer look at a few.

SENIORS FAVOR VISITING FAMILY OR FRIENDS

Visiting family and friends accounts for about 57% of travel among baby boomers according to “AARP 2018 Travel Trends.” Our research found that, instead of relying on their host for a place to stay, 44% of those aged 55+ are choosing to stay overnight at a hotel or resort.

Our findings jibe with AARP, which reports that 49% of boomers travel to “relax and rejuvenate,” with 47% reporting they are looking for “a getaway from everyday life.” Both reasons boomers travel in 2018 are up from 2017, with increases of 38% and 39% respectively.

By paying for lodging instead of bunking with a family member or friend, seniors are able to visit their loved ones without the risk of getting underfoot. It also increases their chances of achieving a relaxing, out-of-ordinary experience while visiting the ones they love.

YOUNG TRAVELERS CHOOSE HOTELS NEARBY

Millennials, those under 35 years of age, might have a reputation for wanderlust. And we’re certainly not suggesting they don’t engage in travel. They do. Our research, however, revealed millennials are more likely to stay overnight at a hotel or resort for a staycation (local vacation) than any other reason.

You might expect to see millennials booking house-sharing properties for staycations instead. Yet in August 2018, [LendEDU](#) reported that 35% of millennial respondents agreed with the statement that “the benefits of a hotel are worth the added cost.” Consistency was among the reasons.

Millennial travel habits do, however, include booking online through services such as Airbnb. In fact, 37% of millennials told LendEDU Airbnb is “a cheaper, preferred option” compared to traditional accommodations. Even so, only 26% of millennial respondents said they have actually stayed at an Airbnb property, with another 27% calling Airbnb “sketchy and not as accommodating.”

THE AFFLUENT TAKE CARE OF BUSINESS

Not everyone travels just for fun. It turns out that 16% of respondents to our consumer-focused study with higher incomes (\$75k+/annually) chose taking a business trip as their top reason to stay overnight at a hotel or resort. These were not people who self-identified primarily as business travelers.

We know not every overnight stay is strictly business. [Bleisure](#), the mixing of business and leisure travel, has become more common in recent years. And it isn't limited to one age demographic. Having the means to extend one's stay, however, seems a reasonable assumption. Corporate travel policies allowing blended work and downtime also come into play—extending what otherwise might have been a day trip into an overnight affair.

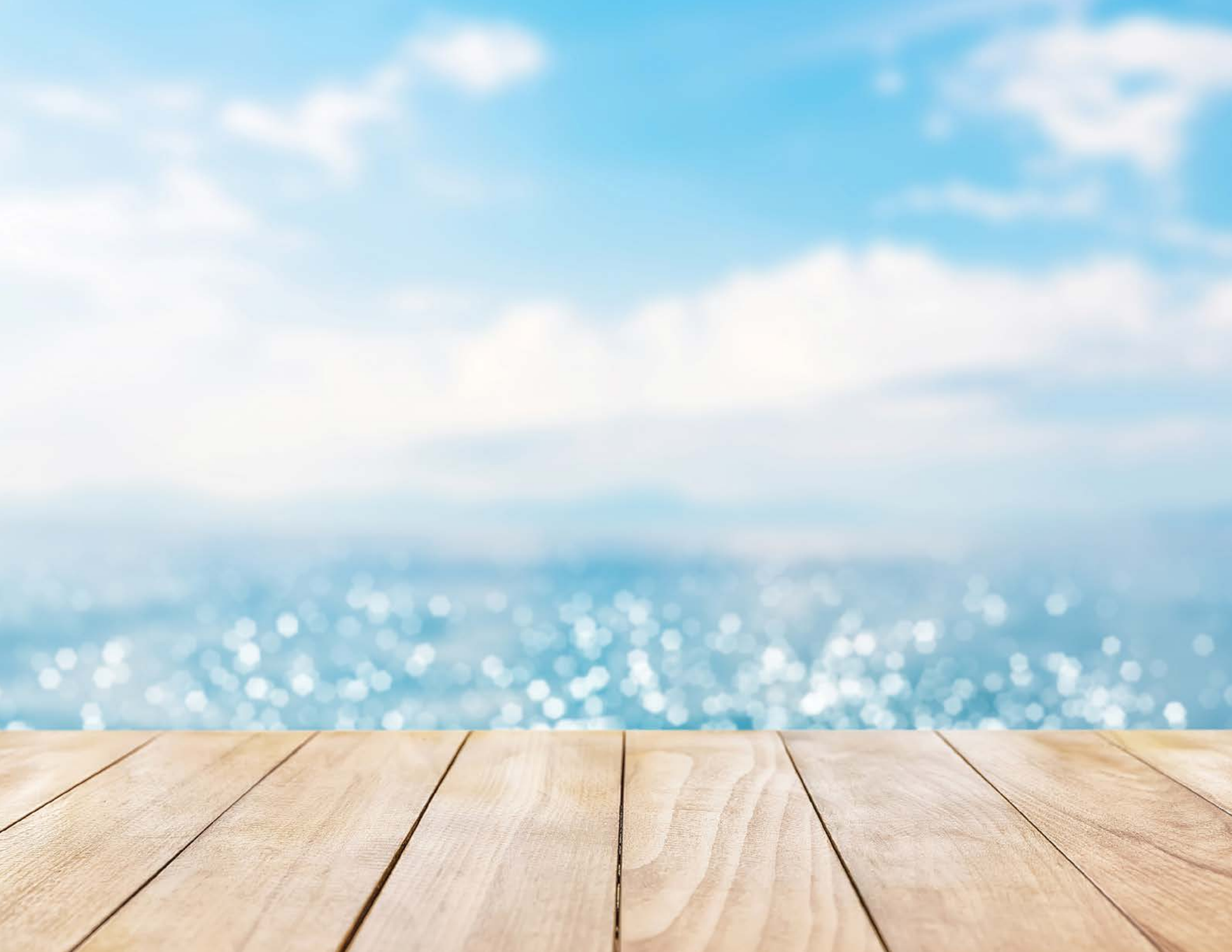
LOOK BEYOND THE TRENDS

With the hospitality industry scene set, it's time to dig into consumer behaviors and perceptions. What do consumers think and feel about their options? What do they want? What do they demand? And what tactics and words best convey the messages they want to hear?

Stick with us through the end, because that's exactly what this report is about to deliver.

Tim Trull, Managing Director, Strategy

Stephen Heitz, Chief Innovation Officer





OVERVIEW AND SELECTED HIGHLIGHTS

The following highlights are representative of the insights we culled from our independent, consumer-focused research. Far more personal than business-to-business studies conducted industrywide, our findings are designed to show hoteliers how to reach a specific market segment—consumers. And we'll reveal their marketing preferences along with additional consumer profiles by age, income, race and other demographics.

Here's what we found

(SELECTED HIGHLIGHTS)



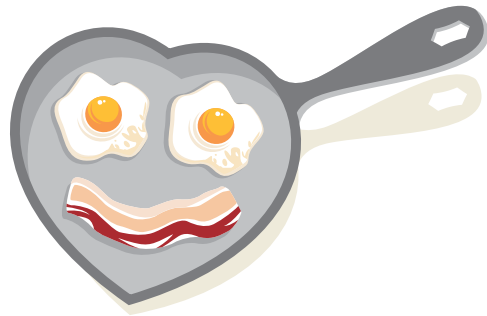
SEASONED TRAVELERS RELY ON REFERRALS

We studied the top media or ways respondents prefer to communicate about hotels or resorts. Personal referrals, at 70%, ranked first with television running up at 63% and online travel sites in third place at 60%. In addition, our research reveals preferences of several breakout demographic groups for a variety of media, including social.



PRACTICAL WORDS ARE MOST PREFERRED WHEN DESCRIBING HOTELS OR RESORTS

We identified the words respondents like best when learning about hotels or resorts. We ranked the top five overall, and then broke it down by age and income level. We also identified words to avoid in your ads.



THE MOST PREFERRED PHRASE FOR HOTEL OR RESORT GUESTS IS TIED TO THE MOST IMPORTANT MEAL OF THE DAY

This section is the meatiest with several categories and subsections within each category. Beyond a free breakfast, which was the most celebrated phrase at 77%, there's a lot to digest, for sure.



HOTEL AND RESORT GUESTS ARE MOTIVATED BY SLOGANS THAT CONVEY VALUE, CONVENIENCE AND SERVICE

We presented respondents with a list of slogans being used by popular hotels and resorts and asked them to identify which were most motivational. Slogans were presented without the associated hotel or resort names. Respondents with incomes of \$75k+ annually chose a slightly different set of slogans as most motivational, compared to those earning less than \$75k annually.



YOUNGER AND ETHNICALLY DIVERSE GUESTS ARE MORE ASPIRATIONAL WHEN CHOOSING THEIR MOST MOTIVATIONAL SLOGANS

Respondents under the age of 35 chose aspirational slogans as most motivational. Similarly, among those respondents who are ethnically diverse, aspirational slogans were more likely to be seen as motivational than among their Caucasian counterparts. There are important differences, however, between the slogans the subgroups most prefer.

[PAR]



SEASONED TRAVELERS
RELY ON
REFERRALS



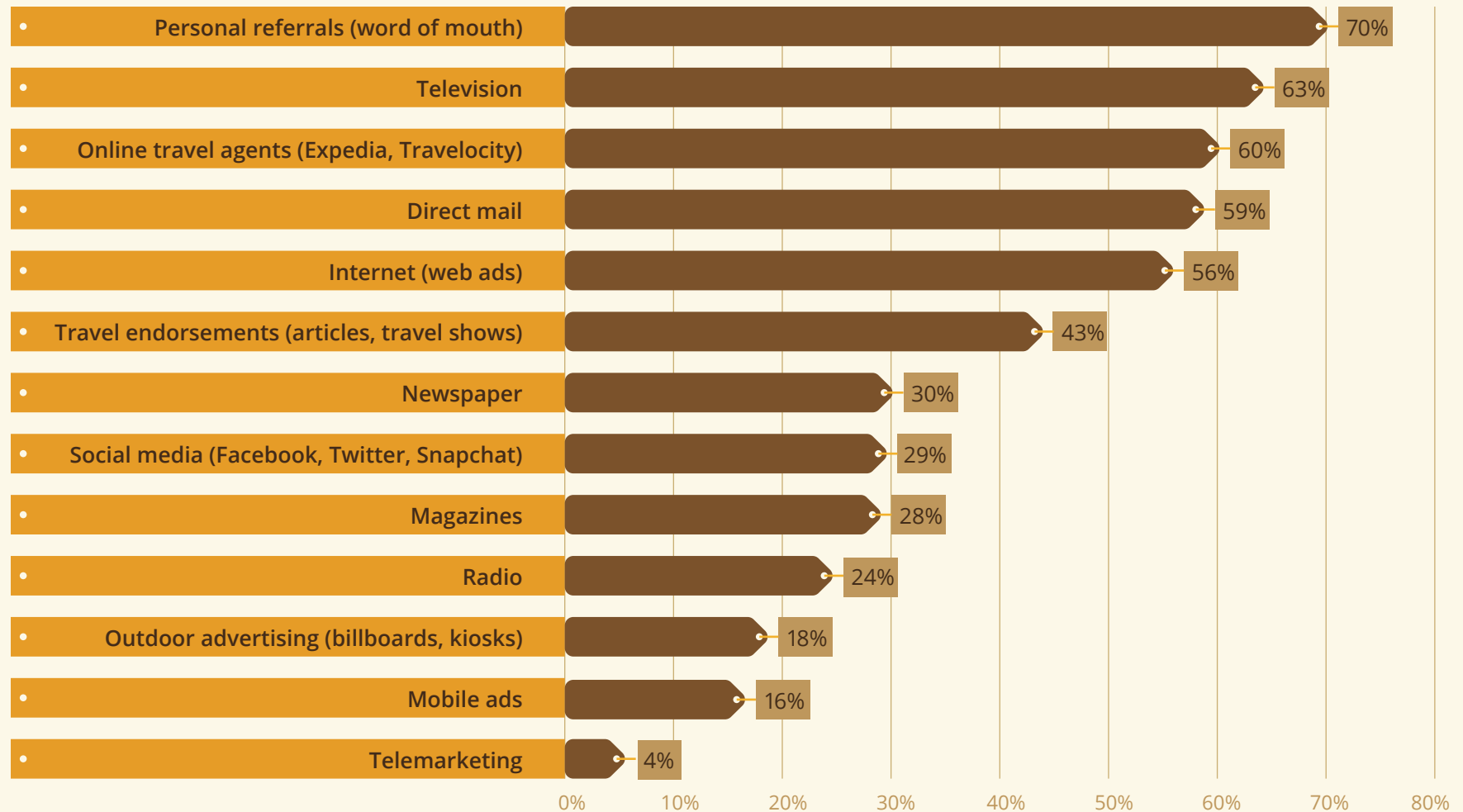
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Seasoned travelers rely on referrals

PREFERRED WAYS MARKETERS USE TO COMMUNICATE WITH YOU ABOUT HOTELS OR RESORTS





Word of mouth is tough to beat—especially when it comes from a trusted source. That’s the bottom line for 70% of study respondents who ranked personal referrals above all other sources of information when considering a stay at a hotel or resort.

“When I made plans for my upcoming trip, I consulted with a friend who had been there,” one respondent explained. *“She gave me lots of ideas.”*

For the cruise portion of the trip she spoke to her sister-in-law, finding out what her experiences had been. Her son, having visited a city she planned to go to, suggested a site she and her traveling companion needed to visit as well as other locations worth seeing in the same city.

Meanwhile, her partner received advice from a son who had visited the same location a few times.

“To me,” the respondent continued, *“these are the best referrals because I know them and they know me. I trust what they have to say.”*

Trust was a recurring theme among several respondents whose quotes could be summed up with this succinct entry: *“You get a true description from someone you know and trust.”*

HERE ARE A FEW MORE
REPRESENTATIVE RESPONSES:

“**You know the people** and their personal likes and dislikes, how easily they are satisfied or **how picky they are**, so you know their feelings of a place.”

“We have a lot of family members and friends that travel and based on our past experiences, **their input has always been very truthful** and we value their input.”

“People have visited and **know what the place actually looks like** and how you are being treated, as opposed to pictures that may be very old.”

“People don’t recommend unless they’ve had **a very positive experience.**”

“My colleagues **understand the needs of my business travel** including best location, amenities and convenience.”

WORD OF MOUTH ISN'T LITERAL

Personal referrals in the digital age can take place nearly anywhere. You don't need to be in the same room or even talk on the phone. Posting a photo album with positive comments on a social media account where family members and friends can see it and interact with comments and questions can also be considered word of mouth.

“Personal referrals are still a major source of information for travelers, and no amount of marketing can replace a glowing review from a family member or close friend,” a 2018 [Hotel Management](#) article states.

Reviews from real travelers count, too. A survey published in 2018 by [PhocusWire](#) found 54% of business and leisure travelers who had taken a trip within the previous year had written one or more reviews of the places where they stayed—93% of which were positive.

[TripAdvisor](#) noted the year prior that 53% of bookers will not commit until they have read reviews, with 80% of them reading between six and 12 reviews before committing to a reservation.

Personal referrals are even more important to mature travelers. Seventy-four percent of respondents aged 55+ chose the tactic as a preferred way to learn about potential accommodations—four percentage points higher than average. In some cases, the age of the reviewer is also important.



"I'm older and my friends are on either side of my 70s, so we're looking for quiet, peaceful beauty and comfortable surroundings," one mature respondent explained. "We've stayed in a lot of places, and usually already know a lot of reliable places that welcome seniors. Hotels/motels ads which include reviews from seniors over 60 are far more reliable than from some tweeter under 25 years old who would review a place—unless you're 25, of course!"

If your niche caters to women, you'll want to pay extra attention to this one. Of female respondents, 76% chose personal referrals as a preferred way to learn about hotels or resorts. That's a full 6 percentage points above average, and definitely worth noting.

Finally, 61% of those respondents under 35 chose social media as a preferred way to learn about hotels or resorts.

"Seventy percent of social-media users share status updates or pictures on vacation, and this provides an opportunity to turn your guests into brand advocates," according to the same *Hotel Management* article.

SEEING IS BELIEVING

Tell me about your experience in the Bahamas and I will listen. Take me into the deep blue seas via my big-screen television in the company of scuba divers and porpoises swimming alongside bright orange coral and leafy green sea ferns. You've just made me a believer.

At 63%, more than half of study respondents said such a scenario accurately applies to them.

"I think television is the most effective because I am able to visually see in real-time what I am looking at as far as the travel area and if it is what I am expecting," one study respondent explained. *"Sometimes they also have real customers in their ads and that also helps me make my decision."*

Another respondent noted watching travelogues and looking at other promotional materials before making actual plans.

"I watch television and enjoy the ads that are entertaining," a third respondent indicated, adding that such ads are *"very effective."*

For others, choosing television as a way to learn about hotels and resorts was tied to practicality.

"I watch television all of the time and it has helped me find the best deals when traveling," said one respondent so predisposed.

Being an avid television watcher is a common position to share. Simulmedia's ["Five Reasons Why TV is so Effective"](#) report reveals adults watch 4 hours, 56 minutes of

television per day—2.5 times more than they spend with YouTube and all social media channels combined. It's also twice as much time as adults spend on their mobile devices and five times as long as they spend accessing the internet from desktop computers.

Television is also widely available, with the greatest audience reach. At least one television can be found in 94% of American homes, compared to only 77% of Americans who own a smartphone, Simulmedia reports.

For a few, choosing television had less to do with the visual effectiveness of the medium and more with attitudes about marketing.

"It's the method least invasive to my privacy that will attract my attention," one study participant said.



ONLINE AGENTS ATTRACT BARGAIN SHOPPERS

Travelers who love a deal like to comparison shop. Our study reveals that 60% prefer to do so with the help of online travel agent sites such as Expedia, TripAdvisor or Trivago—and many more.

HERE'S A REPRESENTATIVE SAMPLING OF REASONS WHY:

“They are able to **search for the lowest rates.**”

“They have access to **more info about all aspects of travel**, hotels, flights, car rental, all inclusive, etc.”

“They are **well informed**, they know on a daily basis **what is out there for different people** from different walks of life. If they don't have an answer for you, they'll find out for you. They are **dependable** and aim to please. They stay in touch with you after you have used their services.”

“I can ask **all kinds of questions.**”

“I actually **seek them out to make reservations.**
I do not use any of the other methods.”

“They give you multiple choices depending on the criteria you use. They are reliable and have **a wealth of information.**”

“They have a lot of **deals on a lot of different kinds of hotels.**”

This aligns with [Google Consumer Insights](#) 2018 which reveals that 48% of Americans are comfortable using nothing more than a mobile device to research, book and plan an entire trip to a new destination. In addition, the same study found that 46% of Americans find it easy to research and book hotels using a mobile device.

The same Google study cites “an easy search functionality and simple booking process” as second only to price as the most important factors when booking travel online via mobile.

Meanwhile, voice and digital assistants, although not traditional online travel agents, are increasing in importance. Oliver Heckmann, Google’s VP of engineering for travel and shopping, noted in a [Think with Google blog post](#) that “Optimizing for the traveler will be even more important as people start to use more digital assistants across surfaces and speak in natural language.” Already, Heckmann notes, “almost 70% of requests that we see to the Google Assistant are expressed in natural language, meaning that people are getting more comfortable having conversations with computers.”

The Google exec further notes that “more than one in three travelers across countries are interested in using digital assistants to research or book travel, and they’re already searching for everything from hotels to flights, and things to do in-destination.”

Because voice searches pull from the same popular travel sites, it’s all tied together.

PUT A STAMP ON IT

Direct mail lagged a single percentage point behind television among survey respondents with 59% of them choosing it as their favorite marketing tactic to learn about hotels or resorts.

Although direct mail slipped from second-most used media type in 2016 to third in 2017, the Data and Marketing Association (DMA), a division of the Association of National Advertisers (ANA), reports that “direct mail continues to show strength in many areas.”

The DMA also attributes direct mail with producing the best response rate at 5.1%, compared to .6% email, .6% paid search, .2% online display, and .4% for social media.

The fact that direct mail also has the highest cost per acquisition of any medium, the DMA notes, has not deterred those within the travel/hospitality industry from ponying up to put it to good use. In 2016, for example, 55% of the industry sent direct mail, landing it among the top three industries using the tactic.

It’s easy to see why. The U.S. Postal Service reports that 81% of recipients [read or scan their mail daily](#).



HERE ARE A FEW RESPONSES REPRESENTATIVE OF STUDY PARTICIPANTS WHO SAID THEY PREFER TO LEARN ABOUT HOTELS OR RESORTS BY DIRECT MAIL:

“I want to feel, touch and **read the fine print.**”

“I have something in my hand that I can **read and save for a later date** to book.”

“I will look at it, add it to my calendar or take the required action and **have something in my hand**...that reminds me of the event.”

“The last vacation I took was a direct **result of getting a mail offer.**”

“If one is thinking of a vacation in July, a bunch of **material can be collected for several months.** Then, when the time is more definite, **pull everything out to compare and decide.**”

For retirees, traditional communication vehicles are preferred with 68% of these respondents choosing direct mail, 41% newspaper, and 38% magazines as the most desired ways to learn about hotels or resorts.

DIGITAL ADS RESONATE WITH MANY

Yes, Virginia, it does pay to place digital ads about great places to stay. Internet (web ads) are the preferred method of communication for 56% of study respondents when learning about hotels or resorts.

REASONS GIVEN FOR THE PREFERENCE VARY, BUT CENTER ON CONVENIENCE AND PRICE. HERE'S A REPRESENTATIVE SAMPLING:

"I'm **on the internet** every single day."

"Most have chats and I **can research anything** I want."

"I'm always checking my email daily & find it **easier to do research on the computer** itself rather than on my phone."

"I am **on the computer more than anything else**, at work and home."

"Web ads point out **the best prices.**"

If your target demographic is millennials, this applies especially to you. At 71%, a significantly higher percentage of respondents under 35 years of age chose internet (web ads) as their preferred method—5 percentage points higher than the average respondent.

PRACTICAL WORDS



AFFORDABLE
CLEAN
COMFORTABLE
QUALITY

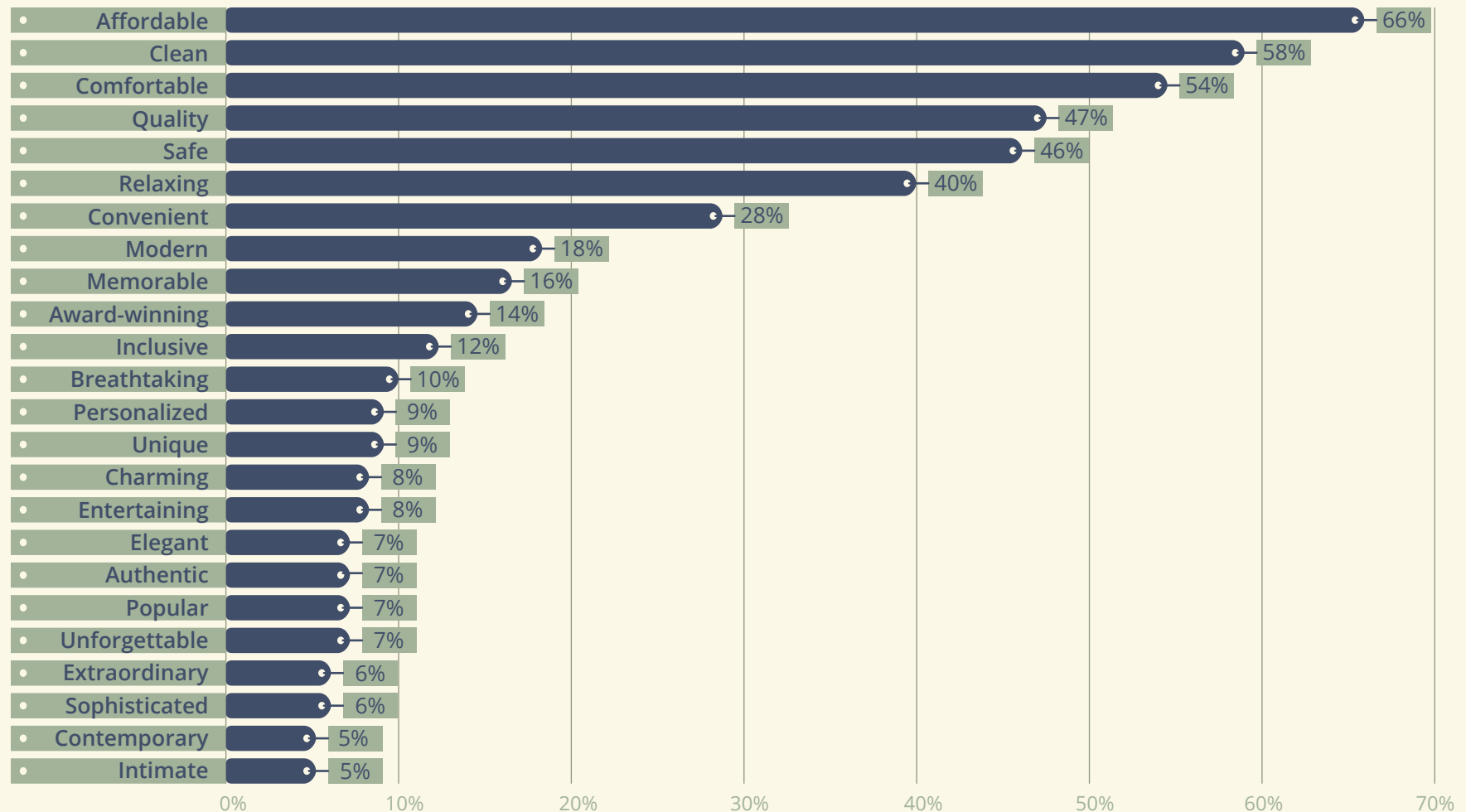


ARE PREFERRED!



Practical words are most preferred when describing hotels or resorts

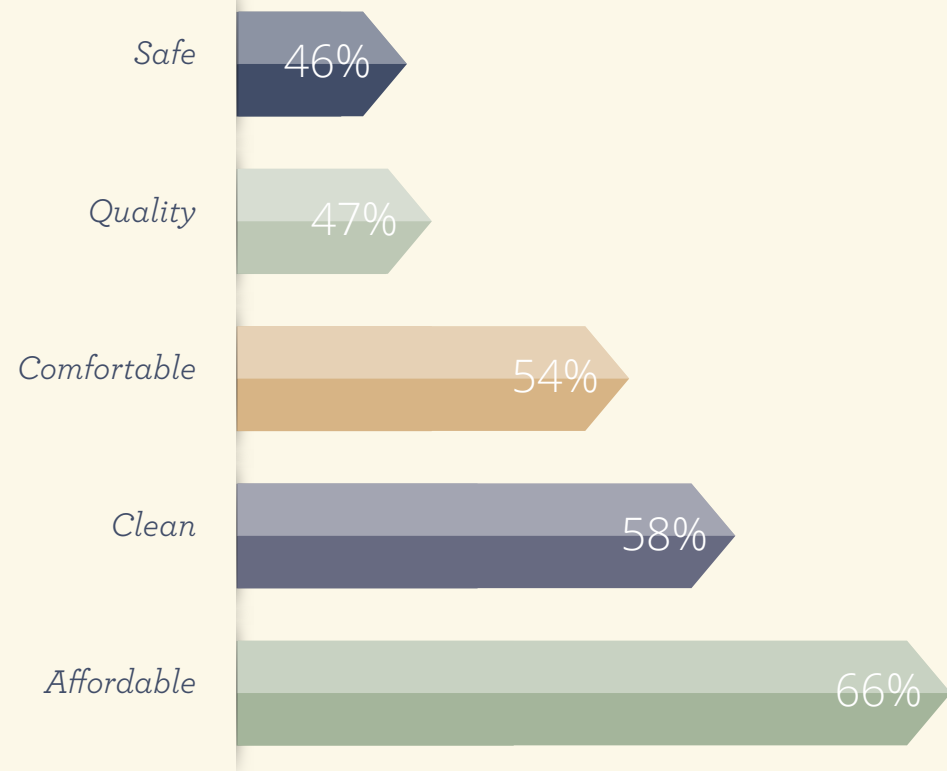
PREFERRED WORDS MARKETERS USE TO COMMUNICATE WITH YOU ABOUT HOTELS OR RESORTS.





Proximity matters, but so much more than being close to planned activities goes into deciding where to stay while traveling.

In fact, study respondents noted strong preferences for hotels or resorts which describe themselves using the following five words:



Let's explore why.

'Affordable' fits the bill

At 66%, the word “affordable” ranked highest in a field of 28 ways to describe a hotel or resort.

This preference for affordability was measured at a time when the monthly average daily rate was \$130.71 (August 2018), up from \$126.72 the year prior. The average daily rate has risen every year since 2012, according to a recent [Statista report](#), with rates peaking in either July or October.

Value in this climate of increasing rates was a recurring theme among many respondents who agreed to explain why.

“Price and value always play a part in everything in life,” one respondent wrote.

“I don’t want to overspend on a hotel that isn’t worth the price,” wrote another.

Even those who can afford more often like to feel like they are getting a great deal.

“I love saving money!” one bargain-hunting participant exclaimed.

Budget consciousness also factored in heavily—especially for families.

“I have to be sure the rates are comfortable for me,” a participant noted.

Others said:

“There isn’t a lot of room for extra stuff. I’m looking for things that are within our family budget.”

“As a family, we need an affordable place to stay for a few nights.”

Affordability equated to simpler accommodations for some participants, who said they were more than happy to spend the night in down-to-earth rooms.





"Most places are really expensive, so I look for places I can afford—even if they aren't the most modern or convenient," one participant wrote. "I'd rather have a rustic room at a nice price than all the bells and whistles at exorbitant prices."

Another fan of affordability stated they *"just need a room to sleep and shower."*

Some guests don't have much choice when it comes to cost.

"I live on a fixed income, so the room rates have to be reasonable," said one such participant.

"I have limited funds and want to spend it on things other than the hotel," commented another.

Another theme dealt with the need to spread out what dollars are available to cover more than a place to shower and sleep at night. The overall cost of the experience plays a role.

"I don't want to spend my vacation dollars on an expensive hotel," a study participant said. *"I want to be able to go on excursions."*

CLEAN

Promote a 'clean' getaway

At 58%, the word “clean” ranked second-highest among study participants as their preferred word to describe a hotel or resort.

A quick search of “*cleanliness and hotels*” brings up news, blog posts and reviews rife with both complaints and tips. Your future guests might have read articles such as [“How to tell if your hotel doesn't actually wash the bedsheets”](#) or how to check hotels for [bedbug infestations](#). It's a real problem, and travelers are both savvy and wary. Your marketing may wish to address these concerns.

For some, being clean is less about being immaculate than being down-to-earth.

“I really don't care about the elegance,” the response states. “I'm a simple person. I prefer clean.”

For others, a lack of cleanliness is a harbinger of things to come.

“As a frequent traveler, cleanliness is the first thing I notice and can make or break my decision to ever utilize the location again,” one respondent noted.

“Attention to housekeeping details speaks volumes about management.”

Another seemed to agree. ***“If the hotel is immaculately clean most other high standards and quality always seem to follow,”*** the respondent said.

A few study respondents offered more detailed explanations.

“Having a clean room, bathroom and bed are the most important thing to me when I stay at a hotel,” one fan of cleanliness noted. ***“If my room is not clean, I am not comfortable and will not sleep.”***

“In the age of bedbugs and roaches, please,” begged another, ***“I want it as clean as possible.”***

Whether simply unkempt or downright dirty, the message such a room sends can be costly.

“We had a bad experience at our last hotel stay and would never use that hotel again,” one dissatisfied respondent said of just such a place. ***“The room was not clean. The bathroom was a mess. It was horrible.”***



Make guests feel 'comfortable'

At 54%, the word “comfortable” proved to be another strong favorite among study participants when it comes to describing potential places to stay. In [“9 Ways to Make Your Hotel Room More Comfortable,”](#) Smarter Travel lists some steps travelers can take, just in case their hotelier misses the mark. By anticipating guest issues ahead of time, you can make your guests’ stay a feel a bit more like home.

Our study respondents offered a few suggestions of their own.

“When I travel and stay somewhere, comfort is of utmost importance,” one traveler explained. *“If it is not comfortable, I will not relax and enjoy myself—no matter how fancy or elegant it is.”*

“When I am out of town staying in a hotel, comfort is extremely important to me,” one particularly strong fan of comfort noted. *“I need to be able to unwind from the day and have all my needs met without having to leave my room unless I want to go out.”*

We’re reading this as including room service, in-room access to Wi-Fi, in-room movies, a refrigerator—and possibly a mini bar with drinks and snacks.

In some hotels, comfort items might be limited to clean towels and a coffee maker with paper cups and prepackaged java, along with an ice bucket and empty water glasses.

In others, guests might also have access to luxurious bath robes, an iron and ironing board (or clothing steam cleaner), a hair dryer, higher-end toiletries and fancy bottled water.

Perhaps it goes without saying, but regardless of the other amenities mentioned, guests expect a comfortable place to lay their head. It's important enough that *Reader's Digest* published a list of ["The 10 Hotels with the Most Comfortable Beds in the World."](#)

"Bed needs to be comfortable so I can get good rest," one respondent noted, while another used negative language to state a distaste for ***"staying places that have uncomfortable beds."***

In addition, comfort should extend beyond the guest room.

"I want to feel at home," one respondent noted. Another expressed the desire for both ***"a comfortable room and nice public areas."***

Travelers demand 'quality'

At 47%, the word "quality" was most important to nearly half of all survey respondents when it comes to how hotels and resorts describe their accommodations.

Web searching for *"quality hotels"* isn't much help for travelers due to so many hotel chains using the word quality in their name. So we tried something else which travelers might also use in their search: *"what makes a hotel room quality?"* This resulted in an [article in TripSavvy](#) linking quality to luxury. With that in mind, we're also loosely linking the words.

This segment of study respondents were discerning. Without specifically stating a preference [for four- or five-star hotels](#), they did allude to desiring some of the amenities—including good service.

"I don't care as much about price as I do the experience. Quality represents something that is of value to me."

A second respondent described quality as ***"money well spent; not cheap but not too extravagant. You can expect good furnishings and service."***

Another study participant related quality to ***"caring,"*** adding that ***"good staff and management result in a good experience."***





Provide a 'safe' space

At 46%, the word “safe” earned the final slot in our list of top-five words which study respondents said they prefer for hotels and resorts to use when describing themselves.

Business Insider published [“13 ways to make sure you and your information are safe at a hotel,”](#) for those who aren’t convinced their hotel offers sufficient security.

Safety is an important enough topic that an annual [Hospitality Law Conference](#) convenes to discuss the year’s top cases. In 2016, such cases included a dram shop complaint involving the service of 12 to 15 beers during six or seven hours to a customer who then attacked another guest in the hotel parking lot. Others relate to fraud in a casino resort related to table games, negligence/premises liability for dangerous conditions leading to a guest fracturing her knee by tripping over a walkway in a hotel lobby, and negligence/security matters related to physical harm due to a drunken fight over a wallet.

Nothing, however, tops the 2017 Las Vegas shooting at Mandalay Bay, after which the hotel announced it was [suing 1,000 victims](#) in addition to being sued by many of them. It’s a complex situation, as demonstrated in [security videos](#) the hotel later released showing the shooter acting seemingly normally.

Why mention it? Because hotel security matters, and there [are steps hoteliers can take](#) to ease guests’ minds, like our study participants who responded favorably to the word “safe.”

One casual respondent simply noted the desire to enjoy their trip free from worry.

For some, however, safety means everything.

“This is the most important issue for me as I travel alone at times or with my children,” one such respondent explained. “Safety in our world is most important. If a resort or hotel cares about safety, then everything else should also be important to their establishment as well.”

At least one respondent agreed.

“I am a woman traveling alone or with another woman,” she said. “Safety is a prime concern when traveling for me and whomever is with me.”



AGE & INCOME INFLUENCE PREFERENCE

Commonalities are great until you need to reach a niche. Here's the breakdown of how age and income level impacted preferences among respondents.

Respondents aged 55+ chose more practical words such as affordable (69%), clean (61%) and comfortable (58%) as top choices.

Respondents under 35 years of age also chose practical words such as affordable (53%), clean (49%) and quality (39%) as top choices. Yet they were also more willing to consider more aspirational words such as unique, entertaining and extraordinary, compared to their older counterparts.

Those respondents with incomes over \$75k+ annually chose words such as clean (63%) and modern (25%) over those making less than \$75k annually.

MUM'S THE WORD

Some words are better left unsaid. We identified a few adjectives savvy marketers should especially avoid when describing hotels or resorts.

These include experiential, remote, inspired and legendary, as these were the least favorite choices among all groups.



People love free

breakfast

ATH



08



FLIGHT No.

-436-

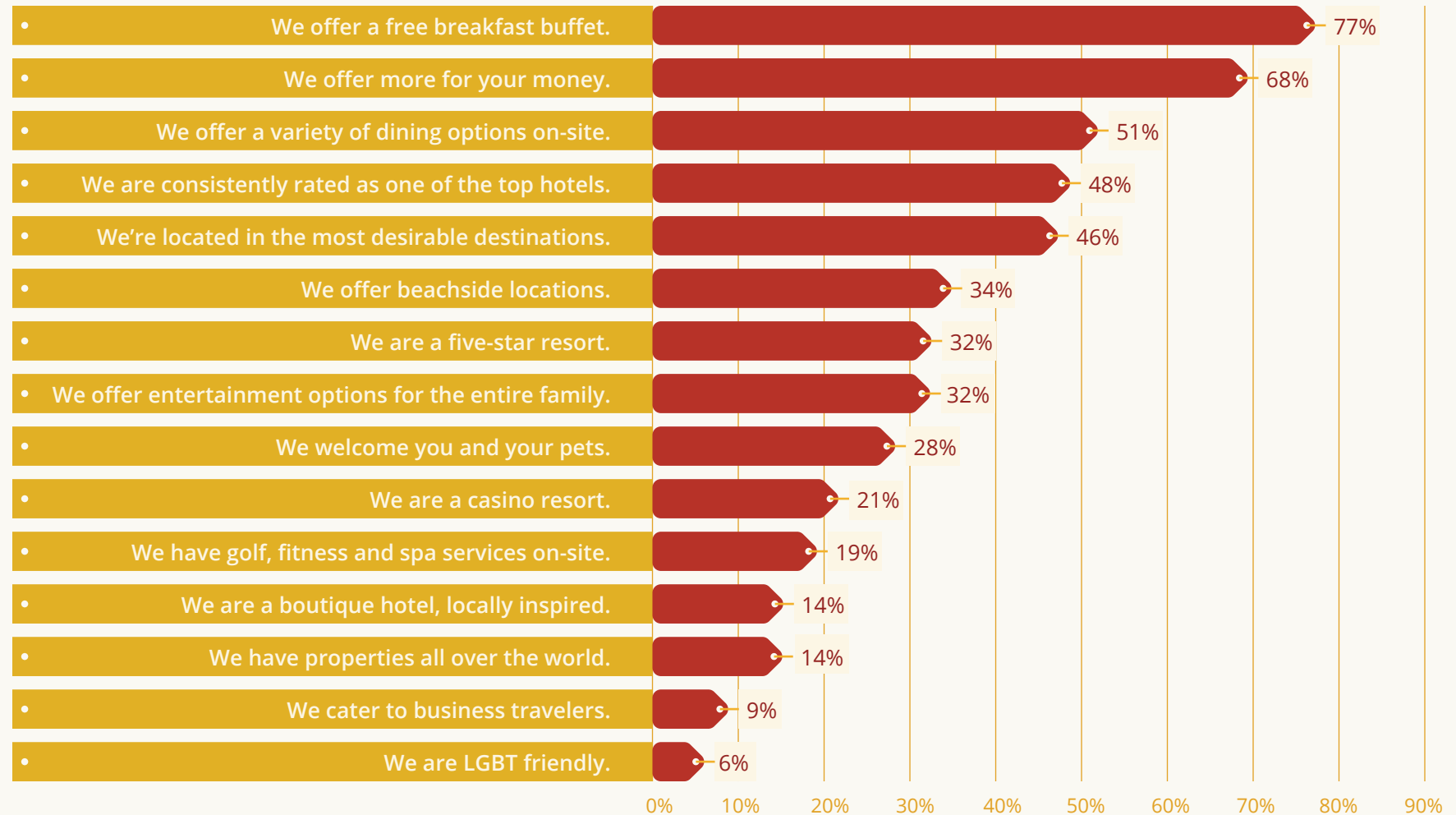
WEIGHT

38



The most important phrase for hotel or resort guests is tied to the most important meal of the day

PREFERRED PHRASES MARKETERS USE TO COMMUNICATE WITH YOU ABOUT HOTELS OR RESORTS.





If you're going to skimp, don't do so by eliminating your free breakfast buffet. Your lineup of cold cereal, fresh bananas, apples and perhaps an assortment of plain and fancy bagels or varieties of yogurt is likely attracting more business than you think.

More than three-fourths (77%) of study respondents rated verbiage about a complimentary morning meal as their favorite phrase when considering booking a room in a hotel or resort. Even if they don't tear into a tiny box of crispy rice or sweetened puffs of corn, many travelers like knowing it's there—just in case.

Others demand that it be available, for a variety of reasons.

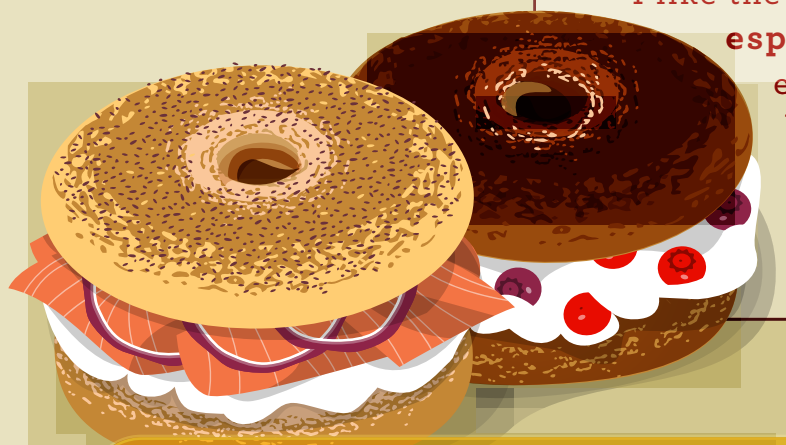
Reader's Digest published a list of [15 Hotels Which Offer a Free Hot Breakfast](#). And Clark published a list of [35 hotel chains which offer free breakfast](#), some hot, some cold. These reports and more reveal that some hotels, perhaps even yours, offer a full-service hot breakfast bar with eggs, bacon, waffles, omelets made to order, and everything from crunchy granola to organic milk and a variety of juices, coffees and teas.

Here's what our respondents had to say about their stated preference to wake up to some version of such a spread.

Our first quote covers a lot of ground—especially for families.

"Eating out [is expensive] for a large family and we don't typically get ourselves out and about early. We get the breakfast things out of the way by eating in the room as we are getting dressed and ready to hit the vacation spot."

The same respondent added that they usually ***"stay out doing activities and eat lunch and dinner out wherever we go for the day. And then we turn around and do it all again the next day."***



HERE'S WHAT OTHER FAMILY-ORIENTED RESPONDENTS HAD TO SAY:

"I like the **convenience of not having to pay** for breakfast, **especially when you have kids**. I am a part-time event planner and my clients prefer not to go out for breakfast after a night of partying and drinking."

"I think it's a great feature, especially for families. **I always check to see if they offer it.**"

MANY OTHERS ECHOED THE ABOVE VALUE- AND CONVENIENCE-ORIENTED SENTIMENTS:

"I think it is **nice to have breakfast at the hotel** before you leave for the day for other activities. Of course, **free is always nice.**"

"It's nice to get up to breakfast every morning **without waiting for service.**"

"Having a **convenient** and inclusive breakfast option is something I usually look for and is... **money-saving**. This saves costs of traveling to and paying separately for breakfast."

For some, free breakfast is all part of the adventure of travel. And they won't stay at a hotel unless it puts out a complimentary morning spread.

IN THEIR OWN WORDS, HERE'S A SAMPLE OF WHAT RESPONDENTS HAD TO SAY:

"I like to have my breakfast **available** when I stay somewhere."

"I love free breakfast and **only stay at hotels that offer it.**"

"I **prefer hotels** that do offer a **free breakfast.**"



Bargain hunters love free breakfast. Many respondents gave the amenity a nod as being ***“time and cost saving”*** and ***“very helpful when you travel.”***

For one traveler, the option of having free breakfast at their hotel is more of a nice-to-have than a deal breaker.

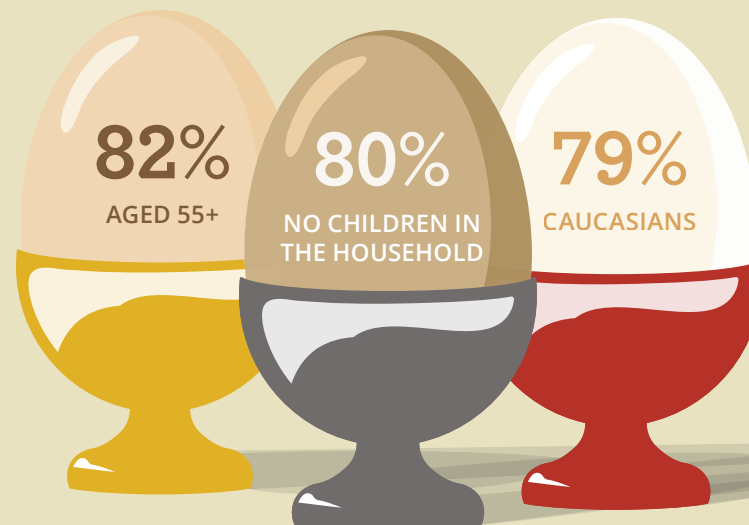
“Usually when I stop at a hotel, it is just overnight, and the breakfast is a good add-in,” the respondent said.

Only one participant displayed a hint of cynicism: ***“A free breakfast is a nice thought, but it isn’t true, of course. I always say that breakfast is included in the price. There is nothing for free in this world.”***

FREE BREAKFAST IS A BIGGER DEAL FOR SOME

While 77% overall chose ***“We offer a free breakfast buffet”*** as their preferred phrase, a few subgroups ranked it from 2 to 5 percentage points higher than the average overall. It turns out that seniors age 55+ are more likely than any other traveler to prefer a free bite to eat in the morning when staying at a hotel.

Here’s the breakdown:



TRAVELERS LIKE TO SAVE WITHOUT SACRIFICING

The phrase *"We offer more for your money"* was favored by 68% of our study's respondents, ranking it second-most popular overall.

"That's what matters to me," one respondent said, while another noted that *"getting a good value for the dollar is most important."*

A handful of respondents made similar, ultimatum-like statements such as *"it's the only type [of hotel or resort] I would visit," "this is a requirement,"* or *"[it's the] most important item of all to me."*

Other responses varied to some degree as several subcategories organically emerged.

Limited budget, limited resources and limited vacation dollars were common themes among those who are retired, living on a fixed income or traveling on a budget. Here's why those respondents said they prefer ads promising more for their money:

"I am on a retirement budget and always looking at costs."

"As a retired individual, I need to be careful with my travel dollars. When a hotel offers more for your money, it means to me that the money spent will be spent on what I need at a reasonable rate."

The majority of responses focused on affordable value in the context of having a great time while getting a great deal. ***"VALUE is the WORD,"*** said one emphatic respondent. Here's a representative sample of how others explained why they prefer the phrase:

"I feel like it's an inviting headline. It's like saying 'Anybody and everybody can afford this.'"

"I am always looking for best deals for what you get in return."

You don't have to be short on cash to appreciate using your vacation resources wisely. For some, it ***"just makes plain sense."*** Here are other comments such respondents conveyed regarding getting the most for their money when booking a room at a hotel or resort:

"I prefer good value versus wasted money for image."

"It feels smart."

"I like using money wisely"

Our respondents made it clear they don't just want to pay less. They expect hotels and resorts to offer amenities at reasonable prices. Here's how they expressed such thoughts:

"It's a luxury stay, but not just exclusive for the rich," was a common sentiment among study respondents.

"I don't have enough money to not worry about getting the best deal. So, I start there, but then the other criteria come into effect."



"For instance, if I am going to an area such as Hawaii, then being close to the beach is more important than price, but I still want the most for what I do pay."

Another respondent noted that they *"Don't get to travel as often as we would like and it is always a good time to splurge. We like to feel like we have been spoiled with everything our money bought us, like we stretched it effectively to get a five-star experience while paying for affordable accommodations."*

Meanwhile, respondents are wary of ads which might misrepresent such upgrades.

"Some hotels are not worth their cost," one savvy traveler in search of good values said. *"Pictures on the website can be deceiving. Sometimes you don't know what you're getting until you're already there."*

Surprisingly, families and children, although they play a role in other sections, were barely mentioned outright in this portion of our consumer study. Here's the lone statement on their behalf: *"It is important when traveling with children to get the most entertainment for the money."*

The word money, however, did come up many times along with the word price. Some respondents were so laser-focused on cold, hard cash that their comments deserve a section all their own:

"Money is in short supply for all but the wealthiest. Your dollar needs to go further."

"Money is usually the first consideration of mine when choosing a place. I may pay more for a decent place, but still want my money's worth."

CONVENIENCE IS THE SPICE OF ONSITE DINING

At 51%, study respondents noted a preference for the convenience of being able to eat at the hotel, as well as having multiple options to choose from.

“If you have traveled all day you don’t want to look for a place to eat in an unfamiliar area,” one respondent explained.

“We don’t want to travel for dinner,” another contributor said.

“When you’re hungry and tired, the last thing you want to do is try to find a restaurant and a ride to it,” said another, conjuring up images of weary travelers in need of a break.

Other responses were more focused on the food choices themselves.

“Food is an important element,” one such respondent said.

“We would love having lots of options, especially if we are traveling as a family.”

“I like choices, especially if I am with my family and grandkids,” wrote another fan of variety.

For one traveler, ***“good dining facilities”*** are important.

“I like to know that hotels have them,” the respondent noted.

While one study participant noted that some resorts are close to fast food chains, another stated that when several dining options are offered on site guests are not pigeonholed into one category of food.

And that, they all agree, makes any hotel visit a little nicer.



“One of the pleasures of vacations is dining out.

Sometimes you just want an elegant dinner. Other times you may prefer a quick snack.

It is nice to have either available without having to leave your hotel if you are tired, jet lagged, etc.”





TOP HOTEL RANKINGS DO MATTER

Okay, so it wasn't the most important factor when choosing a hotel or resort. Still, at 49%, nearly half of all study participants responded favorably to phrasing celebrating hotels as being consistently ranked among the best.

Here's what they had to say:



"They are usually the best, and the **best kept.**"

"**Comfort** at a top hotel is key."

"Different vacationers/business people rate hotels and when the results put it in one of the **top ones**, that tells me that **it has the things that I want.**"

"A top hotel would have the things I want: **cleanliness**, safety/security, **good value** for my money, various **dining options** and **things to do** both **in the hotel** and **in the surrounding area.**"

"I want to know if the hotel is a good one that has stood the test of time, that the hotel is **taken care of** and that the **customers are treated right**. If consistently rated as a top hotel, then the hotel is **doing something right.**"

DESIRABLE LOCATIONS ARE KEY

At 46%, *"We're located in the most desirable locations"* was a popular phrase among all groups.

"Once one arrives at their destination, they don't feel like traveling anymore," a study respondent explained. *"They want to be in the middle of everything so they can take advantage of as much as possible while they are there."*

One participant said a desirable location means they *"might not have to rent a car which will save lot of money."*

Another respondent noted a preference for *"unique"* and *"one-of-a-kind"* locations instead of "average or something you can get next door," backed up by respondents who described desirable as *"special," "interesting"* or *"in the heart of the city."*

"I plan my trips by destination and then decide what hotel," another respondent explained. *"I wouldn't choose a hotel just based on how nice it is if I didn't want to visit the destination."*

Other participants expressed interest in a property's proximity to attractions. *"It goes to show that these hotels were strategically built in places that would favor the client,"* a respondent explained.





BEACH, LUXURY, FAMILY & LGBT PREFERENCES SKEW YOUNGER

Sure, many mature travelers with discerning taste enjoy booking a suite at an upscale hotel or resort overlooking a sandy beach.

Our research uncovered, however, that respondents aged 54 and younger preferred the following phrases over their older counterparts—and why:

We are a five-star resort

"Five stars is the best rating available for hotels. Enough said."

"We always want the best."

"The rating is supposed to be certified, not just thrown out there."

We have golf, fitness & spa services on-site

"When I go to a five-star hotel I want a massage, a facial and a pedicure. It is my chance to spoil myself."

"I like to work out a lot."

"I'm a golfer; what else?"

We offer entertainment options for the entire family

"We usually travel with our family and want everyone to have something to do."

"As a family, we need activities for the kids to keep them occupied and for us to have fun."

"Nothing spoils a vacation more for the rest of the family than an unhappy family member."

We offer beachside locations

"I like balcony views or overlooking the harbor, lake, or whatever is pretty."

"I love staying on the beach. They do not have to be a five-star hotel if I can sit on the lanai and watch the water. I like being able to listen to the water at night when I am in bed and I love the smell of the ocean."

WE ARE LGBT FRIENDLY

Our research focused on participants based in the Southwest, but we realize their travel plans can take them around the world. For LGBT travelers, being savvy about what is socially acceptable, legal and safe at various destinations is important enough that the [U.S. State Department](#) has published guidelines for international travel.

Numerous blogs and magazine articles also post information about events and entertainment activities geared specifically toward members of this community, making it easier now than ever for hospitality marketers to plan well-timed, coordinated promotions.

In addition, larger hospitality industry players including [Hilton Hotels & Resorts](#) and [Southwest Airlines](#) have LGBT outreach programs. [Travel Pulse](#) praises such programs, explaining that the LGBT community has become a “critical” market segment.

Hilton launched its first team member resource groups including a LGCVTQ+ & Friends group in 2012. Under the

hashtag #HILTONPRIDE, the global chain as a presenting partner with GLAAD, IGLTA and The Human Rights Campaign for #SPIRITDAY 2018 offered discounts and support during the mid-October weekend event.

Southwest partners with numerous organizations including a few in the Southwest such as [Gay & Lesbian Community Center of Southern Nevada](#), [Equality California](#) & the [North Texas GLBT Chamber of Commerce](#).

HERE'S WHY STUDY PARTICIPANTS SAID THEY PREFER HOTELS AND RESORTS WHICH DESCRIBE THEMSELVES AS BEING LGBT FRIENDLY:

“I’m **gay** and it conveys the hotel’s “trendy.”

“Some of my **friends are LGBT**
& I want them to feel **safe**.”

“It’ll be **effective** showing how **equality-friendly**
it can be, welcoming all sorts of people.”



INCOME LEVEL INFLUENCES PRIORITIES

Respondents who can afford to spend more expect more. Our research found that those with higher incomes (\$75k+ annually) chose phrases that reflected more discerning tastes.

Here are the phrases which resonated best along with representative samples of numerous responses explaining why—including a single brand which was called out by name.

We are consistently rated as one of the top hotels

"If it is so well thought of it makes me feel safe staying there."

"It means that the level of quality and service is high consistently, so I do not have to worry about them having issues or problems."

"Marriott properties are excellent."

"Multiple people have given the hotel a top rating for consistently delivering good service."

We're located in the most desirable destinations

"If I'm traveling, I want to be where I need to be, and vice versa."

"When one travels it is nice to be close to attractions and restaurants, etc."

"It tells me that there are things to do at that location, outside of the resort."

Finally, the sentiments behind the following response echoed throughout participant comments in this section: ***"Location is everything. It feels like home."***

LOWER-INCOME TRAVELERS BRING PETS, ENJOY CASINOS

Respondents with lower incomes (<\$35k annually) chose phrases that more closely resonated with what they enjoy most.

WE WELCOME YOU AND YOUR PETS

Bringing Fido or Fluffy along for the family vacation could save one a bundle on kenneling or pet-sitting costs. Even so, only one study participant who responded favorably to the phrase *"We welcome you and your pets"* identified finances as the motivation.

For many more, taking along the family pet had more to do with wanting to include them in the fun. The good news for them, [Dogster.com](https://www.dogster.com) reports, is that the Southwest is particularly pet friendly, with a few notable travel destinations including Santa Fe, N.M.; Sedona, Ariz.; Colorado Springs, Colo.; Park City, Utah; and Phoenix, Ariz.



"We have three dogs and it is important for us to have them as part of our family,"

one budget-conscious respondent said.

"By advertising they are pet friendly it allows us to take our furry family members with us, saving us money on a dog sitter or the extra hassle of finding someone to watch our pets while we are away."

Here's a sampling of representative responses explaining additional reasons why participants find pet-friendly hotels or resorts appealing.

For some, bringing the family pet is *"non-negotiable!"*

For others, it's their first consideration when choosing a hotel.

"I can't find a dog sitter to watch my dog so I'd have to find a place that is pet friendly."

Other die-hard pet travelers wrote:

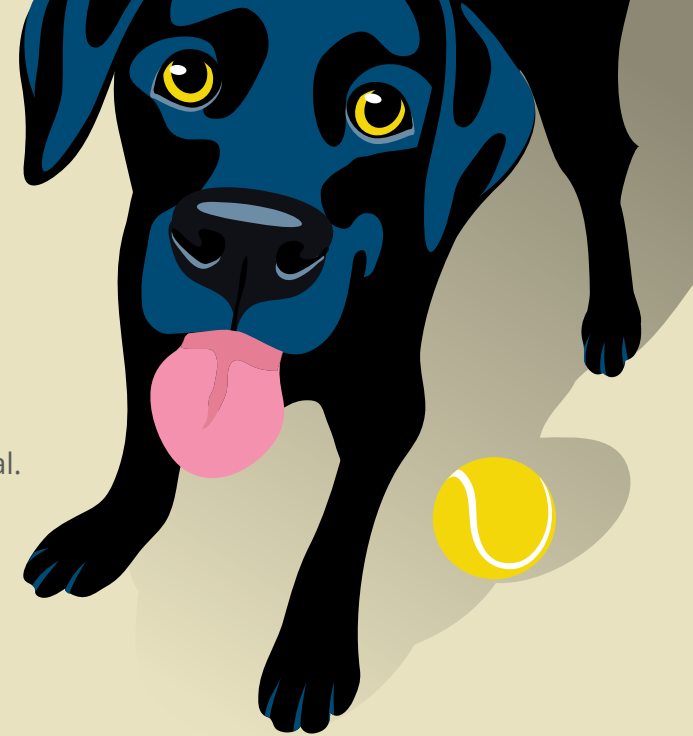
"We travel with pets & always need to know this in advance."

"We always travel with a small, well-behaved dog."

"I love to travel with my dog."



For some participants
the preference for pet-friendly
accommodations was more
empathetic or nostalgic than practical.
Here's what they had to say:



*"I like that the place
is pet friendly."*

*"Many people have
pets & take them on trips.
They're part of the family!"*

"It's my dream to travel with my pet."

*"A lot of times
families take their pets
with them on vacay."*



WE ARE A CASINO RESORT

When you're on a fixed- or lower-income budget, getting a hotel room comped or other perks available in casino resort package deals can be enticing. From free or discounted meals to getting comped gambling dollars or a free bus ride to and from the property, the deals just seem to keep coming. The phrases *"love to gamble," "like to gamble," "love casinos"* and *"like casinos"* showed up repeatedly in participant responses.

Here's more detail regarding why survey participants who earn less than \$35k annually said they prefer staying at a casino resort:

"Being on a fixed income, the most traveling that we do is at Christmastime, treating ourselves to a two-night stay at our favorite casino to relax & spend time gambling like we like to do."

"Casinos have a variety of entertainment for all to enjoy."

"We enjoy the casino and gambling."

One respondent said the phrase resonated because

"I've never been to a casino."



Travelers prefer marketing
messaging promising:



**VALUE
CONVENIENCE
SERVICE**

FLIGHT No.
-46- ↑ WEIGHT
68

AMS

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ANO

Hotel and resort guests are motivated by slogans that convey value, convenience and service

MOST MOTIVATIONAL SLOGANS CURRENTLY BEING USED BY HOTELS OR RESORTS.





Everyone appreciates a good turn of phrase. Being catchy, however, isn't enough when it comes to crafting effective slogans. In fact, our hospitality industry study reveals that travelers prefer marketing messaging promising value, convenience or service.

Here are the slogans respondents selected as most motivational from a list of popular hotel chains. We presented the slogans without the associated hotel or resort names so participants could focus on the message rather than the brand name itself:



NOW LET'S LOOK AT THE
TOP EXPLANATIONS BEHIND
THESE SELECTIONS...



*Everything.
Right where you need it.*

"Convenience" was the word
most used in this section.
"It sounds more like home,"
one respondent said.

HERE'S ADDITIONAL INSIGHT ON WHY THEY PREFER THE SLOGAN:

"Shopping, entertainment, transit system, etc.
If you have them close by it's a big advantage."

"I never have to leave the hotel."

"Convenience is important to me because the
planning part is already hard enough."

"I like to know that I have **access to the
world on many levels** while on vacation."

"It is nice to be conveniently located. It is also nice to
be supplied with shampoo, soap, etc., (that is expected)
but it is **nice to be able to get things you forgot** like a
toothbrush—especially after a late check in."

"It just makes it sound so **easy**, like
the **perfect, relaxing** hotel."

"It makes me think of a place where I can walk in
and get **everything I expect to find** in a hotel."

"It makes you feel that **they have
thought of everything.**"

"They care about their **guests.**"

"This is what a vacation should be."



The best value under the sun.



"Value" was the word most used in this section. *"The best experience for the best price, in my book, is worth the money paid for the lodging,"* one respondent noted.

Here are a few other representative statements:

Retirees said, *"I am value-oriented. I am a retiree on a fixed income and can't afford what I would really want,"* and *"Value is important to retirees so we can take more trips while waiting for the lottery to change our travel habits."*

Those with families said, *"We are always looking for a good value for a family staycation. It sounds like a slogan that would make me check to get further information,"* and *"The majority of families have a strict budget."*

Those who want a great deal said, *"I am looking for quality at a reasonable price,"* *"I look for the best value. This indicates I'll get it,"* and *"It is always satisfying to get great value for your money."*

Those interested in getting more for their dollars said, *"I assume it is not outrageously expensive just to stay in a room for a night and perhaps includes breakfast,"* and *"I want good value for the money I spend. Every place can give me a bed and bathroom, so I'm looking for a really good price plus some extras, like free breakfast, free spa, etc., which would equal the best value,"* and *"We want everything promised, and maybe a little extra thrown in."*



*We put a smile
back on your face.*

“Service” was the theme mentioned most in this section. “I’ve stayed in many hotels during my life, and there are plenty of them that did put a smile of satisfaction on your face,” one respondent noted. “It makes you feel like you’ve made the right decisions, therefore increasing the chances of you staying there in the future.”

Another said, “Most families only take one vacation a year and it should be so special it puts a smile back on your face. Life is so busy and hurried today and families are very different from my childhood. Happiness is almost a thing of the past. I think a vacation is a time for families to get to enjoy a break and reunite as a family again.”

HERE ARE A HANDFUL OF THE REPRESENTATIVE STATEMENTS:

*“Excitement. Enthusiasm. It’s all about the **adventure**, which always puts a smile on my face.”*

*“If a worker has a **frown**, I don’t want to stay there.”*

*“If I leave happy, it was a **great stay**.”*

*“It indicates a **very friendly** and **warm environment**.”*

*“It is **unique** and **fun** and makes me interested.”*

*“It is **always nice to smile**. The **phrase itself** makes me smile.”*

*“Life **needs more reasons to smile**.”*

*“Sounds like a **relaxing** place to **regenerate** and **forget the everyday world**.”*

*“They are **working hard** to **keep their customers happy**.”*

“Travel is stressful. It is important to be able to smile.”

*“When you **NEED** a vacation, you need to smile!”*



See what a difference a stay makes.



This slogan elicited several responses tied directly to the phrase itself, more so than the others. Respondents considered it **“positive”** and **“catchy.”** **“I just like the play on words from what a difference a day makes. It’s kind of clever and I appreciate that,”** one respondent further explained. A single respondent noted a differing point of view. **“I really don’t care about a slogan. I care how I’m treated,”** the participant said.

HERE ARE ADDITIONAL HIGHLIGHTS:

“It makes me want to hop on a plane and go right to the hotel and stay there forever.”

“It only takes one stay to determine if you would come back.”

“It makes you want to go there to see what they have to offer.”

“It says that you will have a wonderful time at this hotel.”

“It tells me that they will give me customer service.”

“It seems like a challenge to see how good the stay can really be.”

“It sounds very interesting. The statement brings on the question about what difference does a stay make? I’m **curious** about **what makes the difference.**”



*Wherever life takes you,
we're there.*

This phrase evoked a variety of descriptive words from respondents including **comforting, ease, convenience, experience, supported, flexibility,** and **dependable**. Beyond the idea that ***"this company would have hotels wherever I am going,"*** here's what research study participants had to say:

"It is important to have a brand you trust when you travel," one respondent said. ***"If I know I had a good experience in one place and can count on the same experience in another area or state that is where I am going to stay."***

"It is good to be able to stop and find somewhere without having to go a specific way," explained another. ***"You should be able to find someplace to stay anywhere you decide to stop."***

"It opens up the world to you."

A FEW RESPONDENTS
VIEWED THE PHRASE
AS ASPIRATIONAL AS
WELL AS LITERAL:

*"The idea is that they have locations **wherever I need them** and also **wherever I am** in my **life's journey**, they are **there for me**."*

*"We **travel for different reasons** and this indicates an **ability to accommodate everyone**."*

*"It implies feeling **connected**—like **family**."*

*"This is a place that **feels like home**."*

*"To me this means that this hotel is **all over**, and that **no matter your budget**, you can stay there."*



HIGHER ROLLERS EXPECT MORE

As one might expect, participants with incomes of \$75k+ annually were motivated slightly differently from those who earn less per year. The top-ranked phrase, however, was consistent with what respondents chose overall. And the second-ranked one in this category ranked fourth overall.

Here are the slogans which were most motivational for higher wage earners:

*Everything.
Right where you need it.*

(Hilton Garden Inn)

*See what a difference
a stay makes.*

(Embassy Suites)

*When life feels
perfect.*

(Four Seasons)

*A place to connect with the world.
A place to stay inspired.*

(Conrad)

Here are a few statements related to the remaining two which motivated more affluent travelers more than any other group:

When life feels perfect.

(Four Seasons)

Respondents want things to go well while they are on vacation. They want to feel pampered. They want to relax. This, they said, would make things perfect.

HERE'S A MORE IN-DEPTH VIEW AT WHAT THAT LOOKS LIKE:

"In this day and age **life doesn't feel perfect** for me so I would just like **a couple of days** where I was **perfectly happy** and **didn't have to worry** about anything."

"I want **everything to be perfect** and **flow smoothly**."

"It makes me feel like it **WOULD be perfect**."

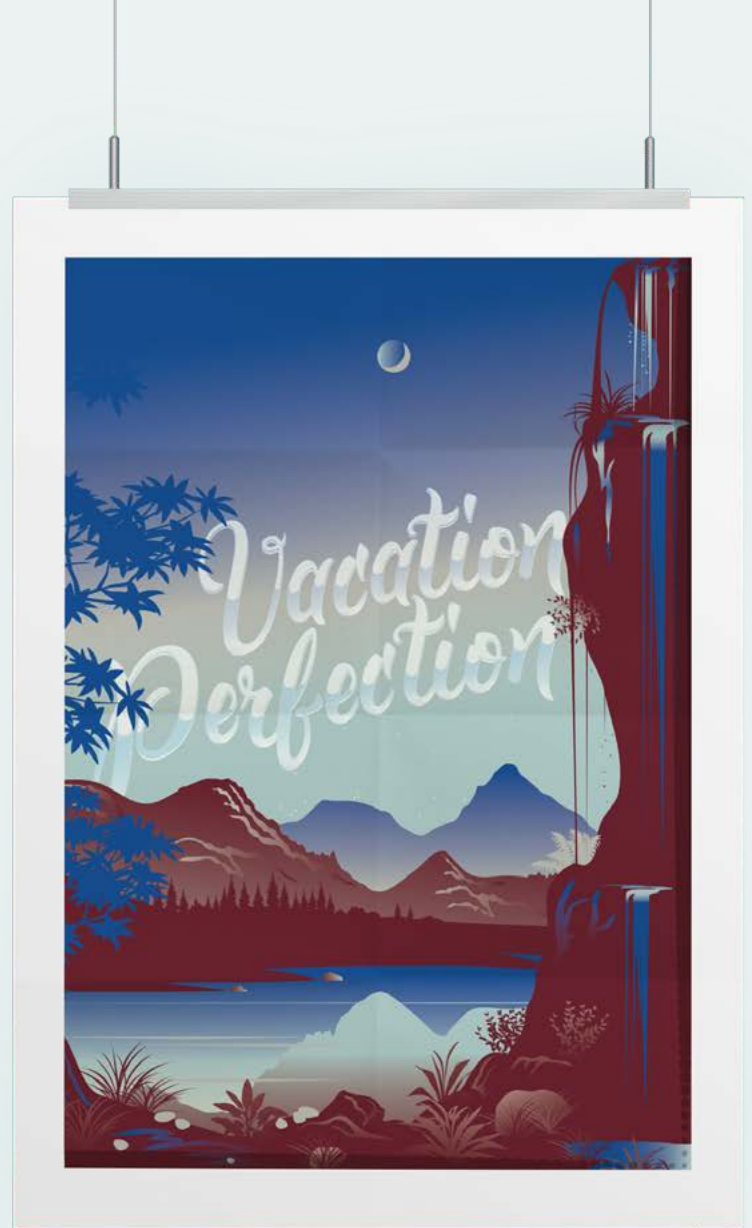
"Vacation needs to feel **just right** and perfect; **no surprises**."

"[**Perfection**] is something **we all strive for**, but **seldom achieve!**"

"It's nice to **get away from life's problems**."

"It's what a vacation goal should be."

"In my view life feels perfect when I can **get away from the day-to-day cares**. I want to be able to **move at my own pace** and **do what I want when I want**."





*A place to connect
with the world.
A place to stay inspired.*

(Conrad)

Study respondents overwhelmingly expressed interest in experiencing new cultures when they travel. Participants used phrases such as “**high-quality traveling experience**” and “**sounds wonderful and magical**” to describe their interpretation.

HERE'S ADDITIONAL INSIGHT ON WHY THEY PREFER THE SLOGAN:

“It makes me **want to try their hotel.**”

“I think it **embodies everything I want.**”

“When traveling around the world it is important
to **feel connected to the city and culture.**”

“It is just **true and corny.**”

“Every time my family and I get a room we **run into
someone from a different state or country** and they begin
to tell their reason for their stay or vacation, etc. It's nice
meeting someone outside of one's own culture.”

“It gives the impression that one can **relax and recharge.**”

“I chose ‘A place to connect with the world’
because to me it means **a world different from my own.**
A new experience is certainly **inspiring.**”

“It just makes it sound like
a place that you want to be.”

“It's effective because it supports what the client is
there for, to **explore new places**—not the hotel.”



HOTEL

young & ethnically
diverse audiences
want

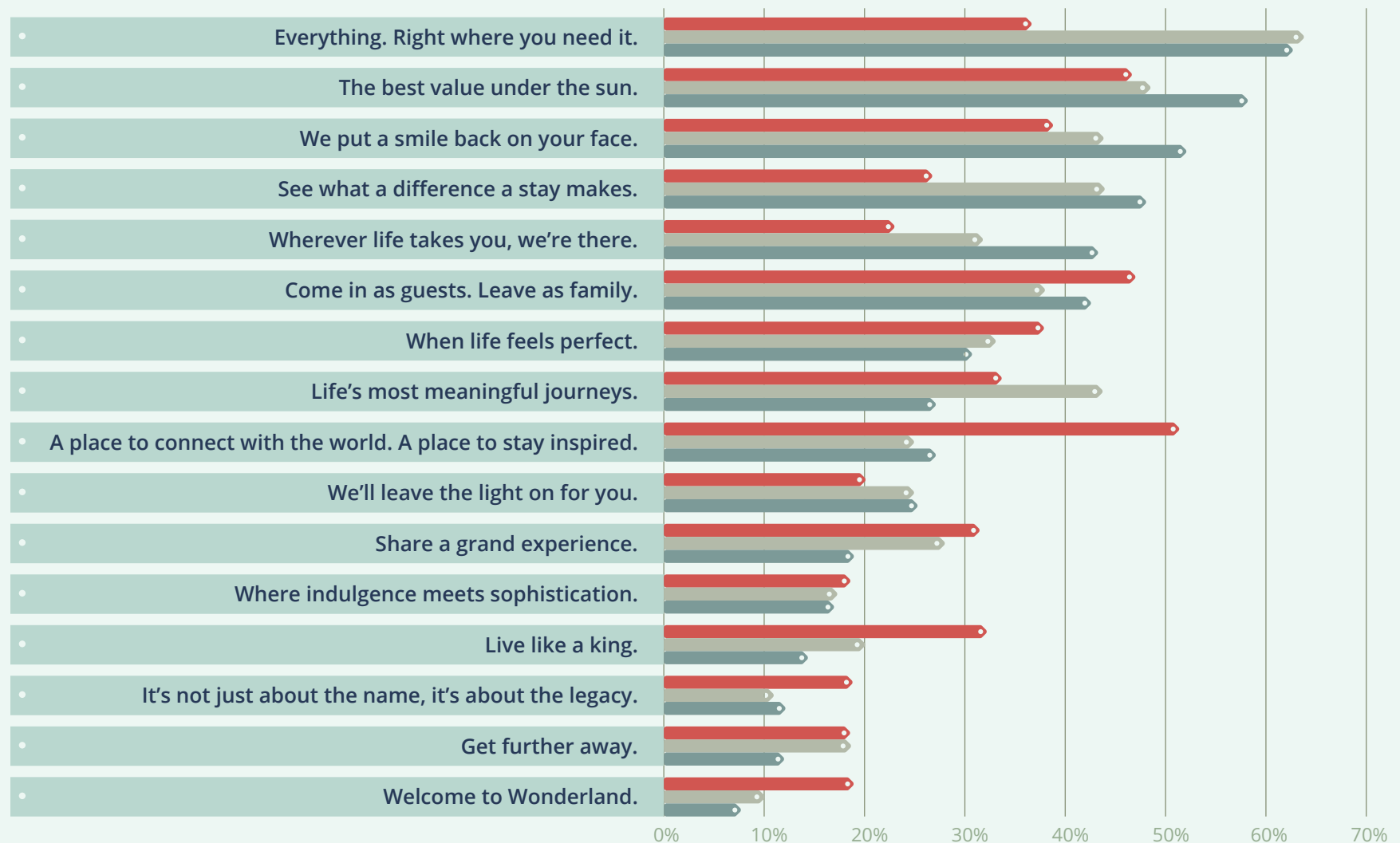
ASPIRATION

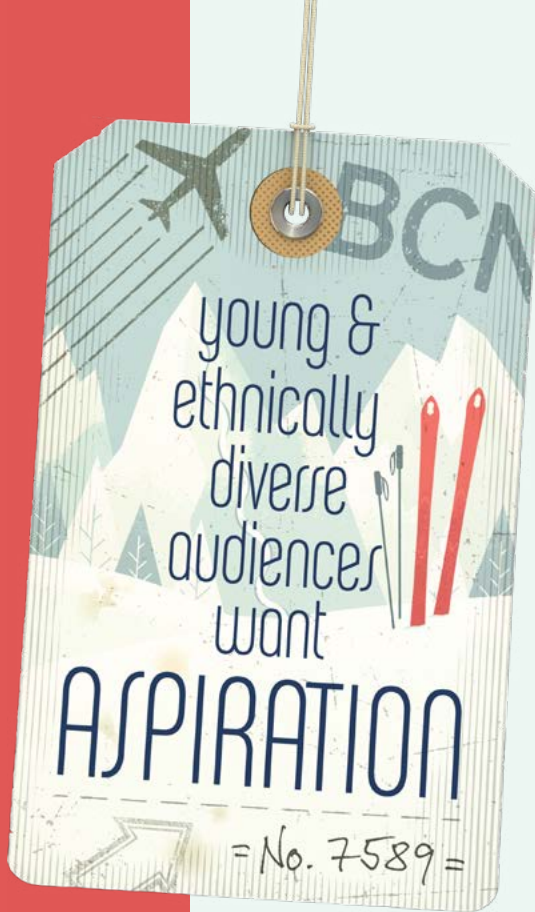


No. 7589

Younger and ethnically diverse guests are aspirational when choosing their most motivational slogans

MOTIVATIONAL SLOGANS CURRENTLY USED BY HOTELS





RESORTS APPEALING TO YOUNG & ETHNICALLY DIVERSE GUESTS.

This section picks up where the last left off. That's because two subgroups emerged when analyzing the data from our study: millennials and those who are ethnically diverse. They each preferred more aspirational slogans than those selected by other generations or Caucasians overall.

So we took a closer look. Here's the breakdown:

Millennials want to connect with the world. Respondents under the age of 35 chose the following slogans as most motivational:

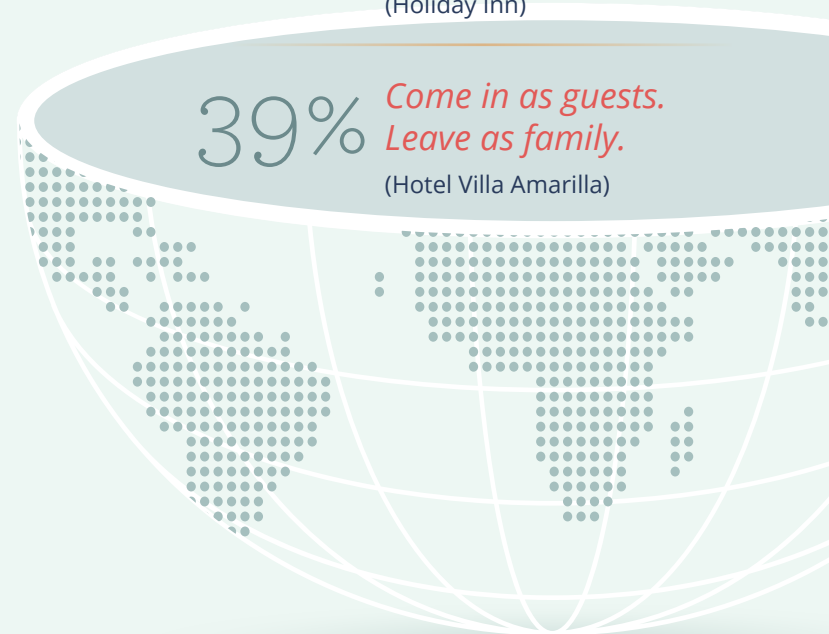
45% *A place to connect with the world. A place to stay inspired.*
(Conrad)

42% *Life's most meaningful journeys.*
(The Ritz-Carlton)

42% *Everything. Right where you need it.*
(Hilton Garden Inn)

40% *We put a smile back on your face.*
(Holiday Inn)

39% *Come in as guests. Leave as family.*
(Hotel Villa Amarilla)



Three of the five slogans have come up previously in this report.

The following two slogans were chosen most frequently by the participating millennials in the study:

Study participants who preferred this phrase indicated a strong connection to family and a desire to be treated well while away from home.

*Life's most
meaningful journeys.*

(The Ritz-Carlton)

THE FOLLOWING ARE HIGHLIGHTS FROM
NUMEROUS RESPONDENTS, MANY OF WHOM
FOCUSED ON THE EXPERIENCE:

“Looking for a **unique and meaningful** travel **experience**.”

“It brings images of fulfillment to mind,
physical, mental and **emotional happiness**.”

“Seems **quite inviting**.”

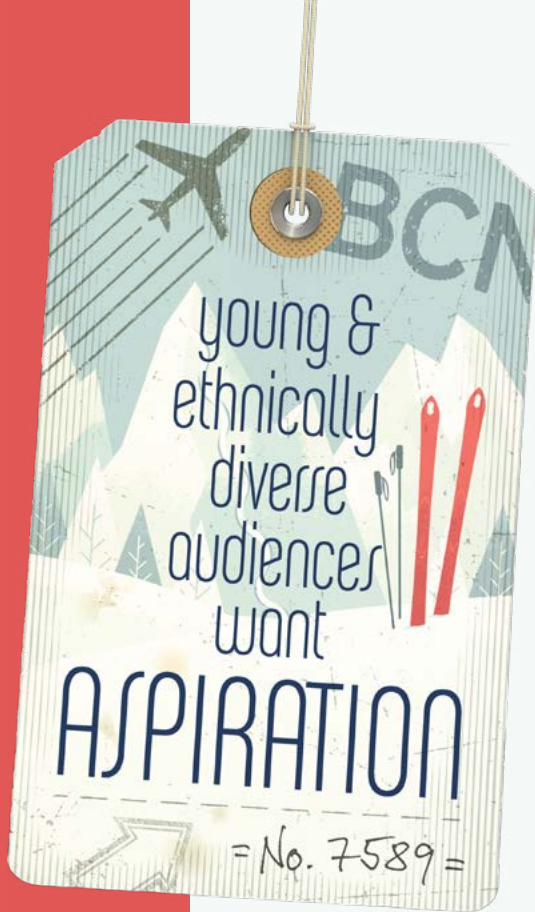
“Because the journey is always in the
memories that you share with someone.”

“**Every trip** starts as **someone's journey**.
And if a **hotel** can help make it meaningful, life's good.”

“It is nice to enjoy a **lasting experience**.”

“That's **what life is about**.”

“Because **memories** are more important than anything.”



Come in as guests. Leave as family.

(Hotel Villa Amarilla)

Here's how a few of them put it in words:

"It sounds like they are more interested in catering to my individual needs, which are quite different from those of most people," one respondent indicated. "... A motel that wants me to think of them as family is more likely to accommodate my peculiarities. It is a very comforting statement."

"It indicates to me that personnel are hired who actually care about what they are doing and enjoy interacting with people," wrote another. "I understand that it is an overstatement, but if the employees have an attitude or simply don't care, it can taint an otherwise enjoyable trip."

“I liked this slogan as it would be nice to stay at a hotel or resort where you **felt more like a person** and less like a paying guest. [It gives] a **feeling of being welcomed and taken care of** with more than just courtesy but **actual warmth and feeling** in your interactions with the staff.”

“To me that means that you will be **welcomed and treated like family**. [There will be] a **warm friendly atmosphere**, and I would expect a **more personal service** than others.”

“It makes you feel that **they care**.”
“It seems **more genuine** than the rest.”
“Hospitality!”
“It shows how they **make you welcome** and **part of their community**.”

“Customer service is very important to me. **If your customer service is bad, I won’t return**. No matter how much I like your hotel.”
“I like a **homey atmosphere**.”

MULTICULTURAL PARTICIPANTS PREFER PERFECTION

Four out of six slogans which ranked best among those who are ethnically diverse were also identified as motivational by their Caucasian counterparts. However, “Share a grand experience” and “Live like a king” bubbled up to the top more within this subgroup.

Here’s the breakdown:

When life feels perfect. (Four Seasons)

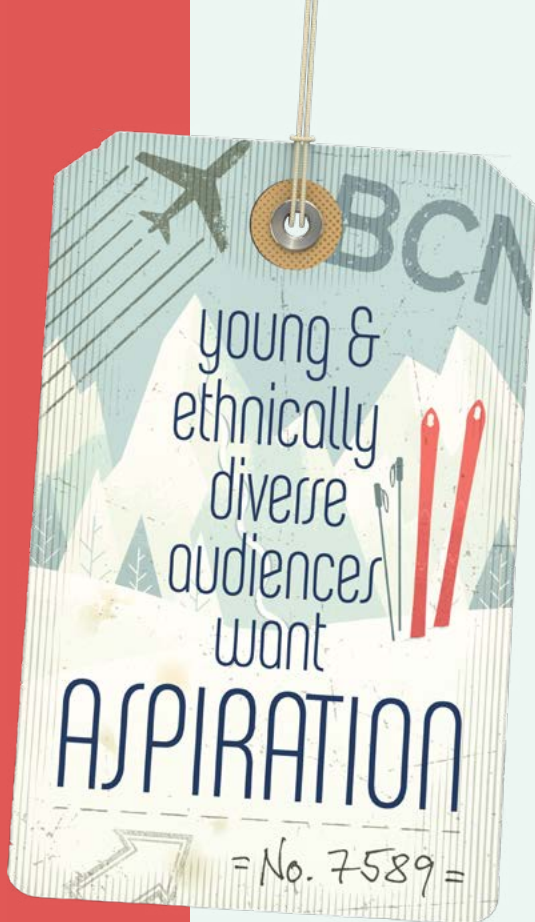
Life’s most meaningful journeys. (The Ritz-Carlton)

Come in as guests. Leave as family. (Hotel Villa Amarilla)

A place to connect with the world. A place to stay inspired. (Conrad)

Share a grand experience. (The Grand Hotel)

Live like a king. (Drawbridge Inn Hotel)



Here's a sampling of reasons our respondents chose the "one-off" slogans:

Share a grand experience.

(The Grand Hotel)

"It sounds like a **fun place to take the family** with many things to do."

"A **vacation should be** hopefully a '**grand experience**,' not a so-so or bad or mediocre one."

"It sounds like a **great time awaits you**."

"I like to **feel good about life**."

"I like to feel like I've gone on the **best vacation ever**."

"You always **want a grand experience** and **feel important and special**."

"Everyone wants to **live a great experience**."

"**Everything is excellent**—better than good—it's **grand**."

Live like a king.

(Drawbridge Inn Hotel)

"I want to **live like a king** when I travel."

"I want to **feel like my needs come first** when at a hotel."

"We all want to be **kings and queens**."

"The king is **always served**, and when I go away and stay in a hotel, I **expect the best service**. This makes you feel like you are **totally living this way**."

"Everyone **deserves** to live like a king."

CONCLUSION

Industry research by PricewaterhouseCoopers confirms that in 2019, economic indicators appear to support continued industry growth, given high consumer spending supported by rising disposable income, employment and household net worth. Counter-balances to continue monitoring include: continued trade tensions, waning fiscal stimulus, increasing interest rates, and growing inflation. Overall, growth in the industry is expected to continued, albeit at a slower pace.

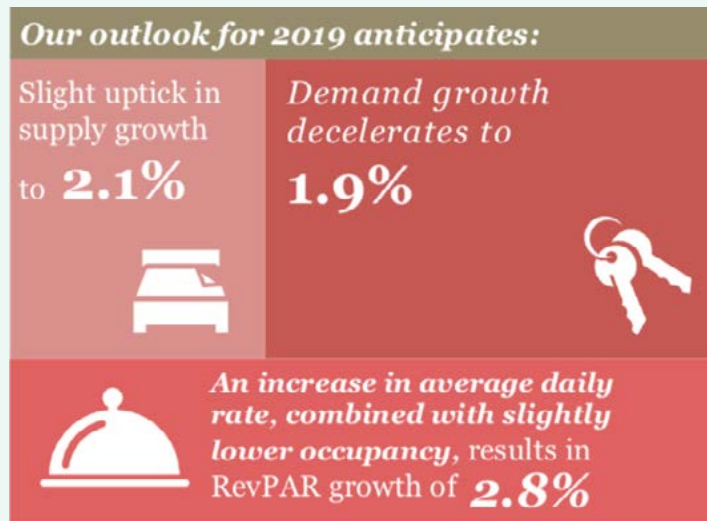
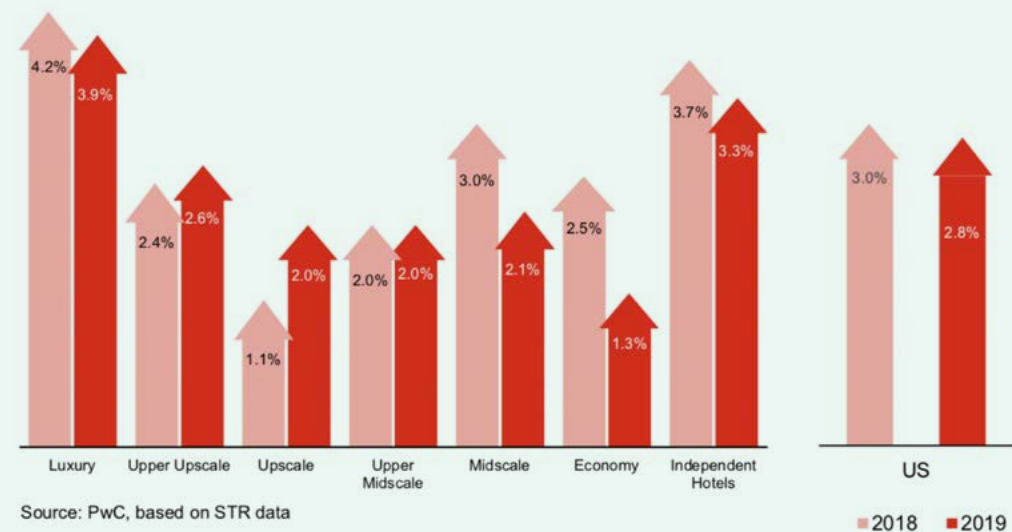


Figure 1: RevPAR growth, US and chain scales



By taking the time to understand consumer preferences and perceptions now, you'll be better prepared than your uninformed counterparts to create content that resonates with your audience. Partnering with an experienced agency such as LAVIDGE can help you dive deeper into your own audience, with all of its intricate quirks and nuances.

And, as the pace of industry growth begins to slow in 2020, that could make all the difference between those which survive and those which thrive.

Thank you for reading. And may you be among those who perform their very best.



Appendix

Methodology

The objective of this research was to gather quantitative feedback from a random sample of adult consumers (18+) living in Arizona and other major markets in the Southwest United States. A total of 450 online surveys were completed, with the following breakdown of completes by market: Phoenix, 150; Salt Lake City, 52; Denver, 47; Albuquerque, 51; Tucson, 50; Las Vegas, 51; San Diego, 49.

Individual participants were provided by a major online survey panel, with the actual survey hosted by WestGroup Research in Phoenix, Ariz. The statistical margin of error for the overall sample is +/- 4.3% at the 95% confidence level, the standard error margin threshold for most public opinion research. Average survey length was approximately 10 minutes to complete.

Error margins for sub-segments of the sample (e.g., different age groups) will vary depending on the size of that sub-segment. Statistically significant findings are noted within the report where applicable.

Research was conducted by WestGroup Research on behalf of LAVIDGE during Q3 2018. Additional in-house research continued through Q4.

Respondent profiles

GENDER

Male	50%
Female	50%

AGE

18-24	4%
25-34	7%
35-44	8%
45-54	8%
55-64	23%
65+	50%

EDUCATION

High school or less	14%
Some college or trade school	34%
College +	52%

INCOME

Under \$35,000	26%
\$35,000 to \$49,999	13%
\$50,000 to \$74,999	22%
\$75,000+	31%
Prefer not to answer	8%

Data

Why guests are likely to stay overnight at a hotel or resort.

Vacation	61%
Weekend or another short trip	44%
Visit family / friends	40%
Staycation	10%
Business trip	9%
Other	3%

Preferred ways marketers use to communicate with you about hotels or resorts.

Personal referrals (<i>word of mouth</i>)	70%
Television	63%
Online travel agents (<i>Expedia, Travelocity</i>)	60%
Direct mail	59%
Internet (<i>web ads</i>)	56%
Travel endorsements (<i>articles, travel shows</i>)	43%
Newspaper	30%
Social media (<i>Facebook, Twitter, Snapchat</i>)	29%
Magazines	28%
Radio	24%
Outdoor advertising (<i>billboards/kiosks</i>)	18%
Mobile ads	16%
Telemarketing	4%

Preferred words marketers use to communicate with you about hotels or resorts.

Affordable	66%	Charming	8%
Clean	58%	Entertaining	8%
Comfortable	54%	Elegant	7%
Quality	47%	Authentic	7%
Safe	46%	Popular	7%
Relaxing	40%	Unforgettable	7%
Convenient	28%	Extraordinary	6%
Modern	18%	Sophisticated	6%
Memorable	16%	Contemporary	5%
Award-winning	14%	Intimate	5%
Inclusive	12%	Inspired	2%
Breathtaking	10%	Legendary	2%
Personalized	9%	Remote	2%
Unique	9%	Experiential	1%

Data

Preferred phrases marketers use to communicate with you about hotels or resorts.

We offer a free breakfast buffet	77%
We offer more for your money	68%
We offer a variety of dining options on-site	51%
We are consistently rated as one of the top hotels	48%
We're located in the most desirable destinations	46%
We offer beachside locations	34%
We are a 5-star resort	32%
We offer entertainment options for the entire family	32%
We welcome you and your pets	28%
We are a casino resort	21%
We have golf, fitness and spa services on-site	19%
We are a boutique hotel, locally inspired	14%
We have properties all over the world	14%
We cater to business travelers	9%
We are LGBT friendly	6%

Most motivational slogans currently being used by hotels or resorts.

	TOTAL	NON-CAUCASIAN
Everything. Right where you need it.	63%	37%
The best value under the sun.	58%	47%
We put a smile back on your face.	52%	39%
See what a difference a stay makes.	48%	27%
Wherever life takes you, we're there.	44%	23%
Come in as guests. Leave as family.	43%	47%
When life feels perfect.	31%	38%
Life's most meaningful journeys.	27%	34%
A place to connect with the world. A place to stay inspired.	27%	51%
We'll leave the light on for you.	25%	20%
Share a Grand Experience.	19%	31%
Where indulgence meets sophistication.	17%	18%
Live like a King.	14%	32%
It's not just about the name, it's about the legacy.	12%	19%
Get further away.	12%	18%
Welcome to Wonderland.	8%	19%

Questionnaire

This brief survey will ask for your opinions on various issues related to hotel and resort advertising, marketing and related topics. For the purposes of the survey, this will mean any advertising, websites, messages or other information you have received from various hotels and resorts.

To complete the survey, simply click on the appropriate answer or provide the requested information where appropriate. For open-ended questions, please provide complete phrases or thoughts, and as much detail as needed to express your opinion.

1. How likely are you to stay overnight at a hotel or resort in the next 12 months?

- Very likely
- Somewhat likely
- Not very likely
- Not at all likely

2. Why might you be staying overnight at a hotel or resort?

- Vacation
- Staycation
- Business trip
- Visit family/friends
- Other

3. Listed below are various media or ways that hotels and resorts might communicate with you.

- Television
- Radio
- Newspaper
- Outdoor advertising (billboards, kiosks)
- Online travel agents (Expedia, Travelocity)
- Direct mail
- Magazines
- Internet (web ads)
- Social media (Facebook, Twitter, Snapchat)
- Mobile ads
- Travel endorsements (articles, travel shows)
- Telemarketing
- Personal referrals (word of mouth)

4. Listed below are the Top 5 methods you selected. Please indicate your top 5 preferences in order.

5. Why do you feel _____ would be most effective in communicating with you?

6. Listed below are several words that hotels or resorts might use to describe themselves. Once again, please choose which words you feel would be most effective and least effective in communicating the benefits.

- | | |
|-----------------|-----------------|
| • Affordable | • Inspired |
| • Authentic | • Intimate |
| • Award-winning | • Legendary |
| • Breathtaking | • Memorable |
| • Contemporary | • Modern |
| • Charming | • Personalized |
| • Clean | • Popular |
| • Comfortable | • Quality |
| • Convenient | • Relaxing |
| • Elegant | • Remote |
| • Entertaining | • Safe |
| • Experiential | • Sophisticated |
| • Extraordinary | • Unforgettable |
| • Inclusive | • Unique |

7. Shown below are your 'Top 5' words; please place them in order of preference.

8. Why did you choose _____ as your favorite word? What is it that makes it so effective?

9. Next, we'd like to get your opinions on actual phrases or statements that hotels and resorts might use in advertising and marketing. Once again, please choose which statements you feel would be most effective and least effective in communicating the benefits.

- We are a five-star resort
- We have golf, fitness and spa services on-site
- We offer beachside locations
- We offer entertainment options for the entire family
- We cater to business travelers
- We offer more for your money
- We have properties all over the world
- We are a boutique hotel, locally inspired
- We offer a free breakfast buffet
- We are a casino resort
- We're located in the most desirable destinations
- We offer a variety of dining options on-site
- We are consistently rated as one of the top hotels

10. Shown below are your 'Top 5' statements; please place them in order of preference.

11. Why did you choose _____ as your favorite statement? What is it that makes it so effective?

12. Following are actual advertising slogans used by a variety of hotels and resorts. Please choose which slogans would be most motivational for you to select that hotel or resort. (Hotel/Resort names were not shown.)
- A place to connect with the world.
A place to stay inspired. (Conrad)
 - Come in as guests. Leave as family.
(Hotel Villa Amarilla)
 - Everything. Right where you need it.
(Hilton Garden Inn)
 - Get further away. (Jackson Hole Resort)
 - It's not just about the name, it's about the legacy. (Hilton)
 - Life's most meaningful journeys.
(The Ritz-Carlton)
 - Live like a King. (Drawbridge Inn Hotel)
 - See what a difference a stay makes.
(Embassy Suites)
 - Share a Grand Experience. (The Grand Hotel)
 - The best value under the sun. (Days Inn)
 - We put a smile back on your face.
(Holiday Inn Hotels)
 - Welcome to Wonderland. (W Hotels)
 - We'll leave the light on for you. (Motel 6)
 - When life feels perfect. (Four Seasons)
 - Where indulgence meets sophistication.
(St. Regis)
 - Wherever life takes you, we're there.
(Best Western)
13. Shown below are your 'Top 5' slogans; please place them in order of preference.
14. Why did you choose _____ as your favorite slogan? What is it that makes it so effective?

THE FOLLOWING QUESTIONS ARE FOR STATISTICAL PURPOSES ONLY.

15. Please indicate your gender: Male/Female
16. What is the zip code where you live?
17. Which of the following includes your age?
- 18 to 24
 - 25 to 34
 - 35 to 44
 - 45 to 54
 - 55 to 64
 - 65 or older
 - Prefer not to answer
18. Including yourself, how many adults 18 or older live in your household?
19. How many children under the age of 18 live in your household?
20. Which of the following includes the highest level of education you have completed?
- Some high school (did not graduate)
 - High school graduate or GED
 - Some college or trade school
 - College graduate (bachelor's degree)
 - Post-graduate (master's degree or higher)
 - Prefer not to answer
21. Which of the following best describes your employment status?
- Work full time
 - Work part time
 - Retired
 - Self-employed
 - Student
 - Temporarily unemployed or looking for work
 - Homemaker
 - Other
 - Prefer not to answer

22. Which of the following best describes your ethnic background?
- Caucasian/White
 - African American
 - Asian American
 - Hispanic
 - Pacific Islander
 - Other
 - Prefer not to answer
23. What is your marital status?
- Single (never married)
 - Married or living as married
 - Separated
 - Widowed
 - Divorced
 - Other
 - Prefer not to answer
24. Which of the following includes your total household income last year before taxes?
- Under \$25,000
 - \$25,000 to \$34,999
 - \$35,000 to \$49,999
 - \$50,000 to \$74,999
 - \$75,000 to \$99,999
 - \$100,000 to \$149,999
 - \$150,000 or more
 - Prefer not to answer

About LAVIDGE

Meet LAVIDGE, an employee-owned ad agency specializing in discovering and communicating insights which engage, motivate and inspire. From building brand awareness to driving revenue and from positioning thought leaders to enhancing perceptions, it's why we do what we do. Our unified marketing approach encompasses advertising, public relations, and digital marketing. And we've been doing it successfully since 1982 for clients in hospitality, healthcare, real estate, education, technology, sports, personal care, food service, and government. Intrigued? Visit us at LAVIDGE.com and get social with us on Facebook, Twitter, Instagram, and LinkedIn.



WestGroup Research, headquartered in Phoenix and founded in 1959, is the largest full-service market research firm in the Southwest U.S., serving a domestic & international client base.



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