



OTAs: Friends or Foes ?

Agenda

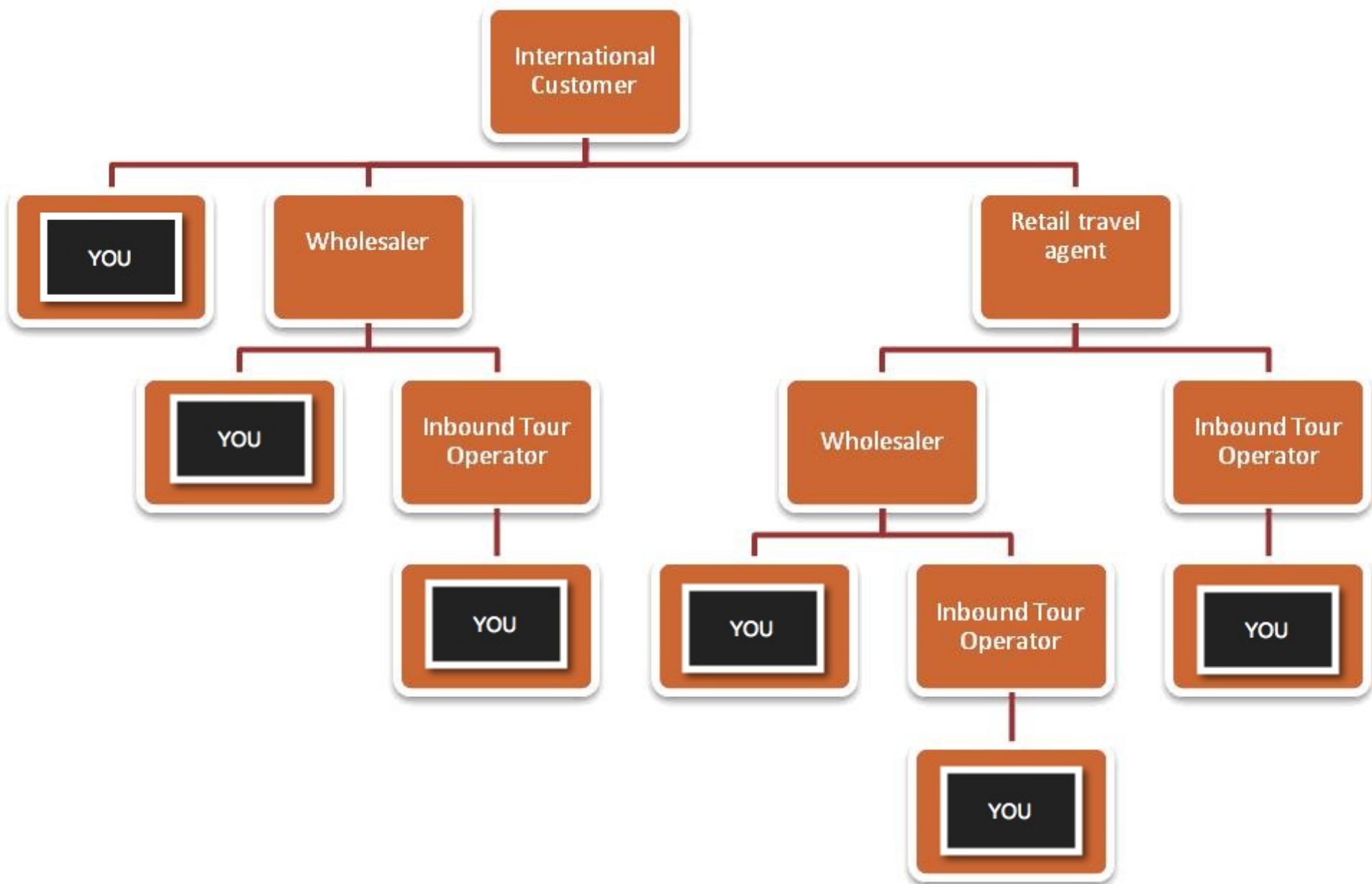
1. The state of online travel in 2015
2. Evolution of the travel distribution landscape
3. Prevalence of Online Travel Agencies
4. What role for TripAdvisor?
5. Google, beyond a search engine
6. Tips to fight back!

1. The state of online travel in 2015

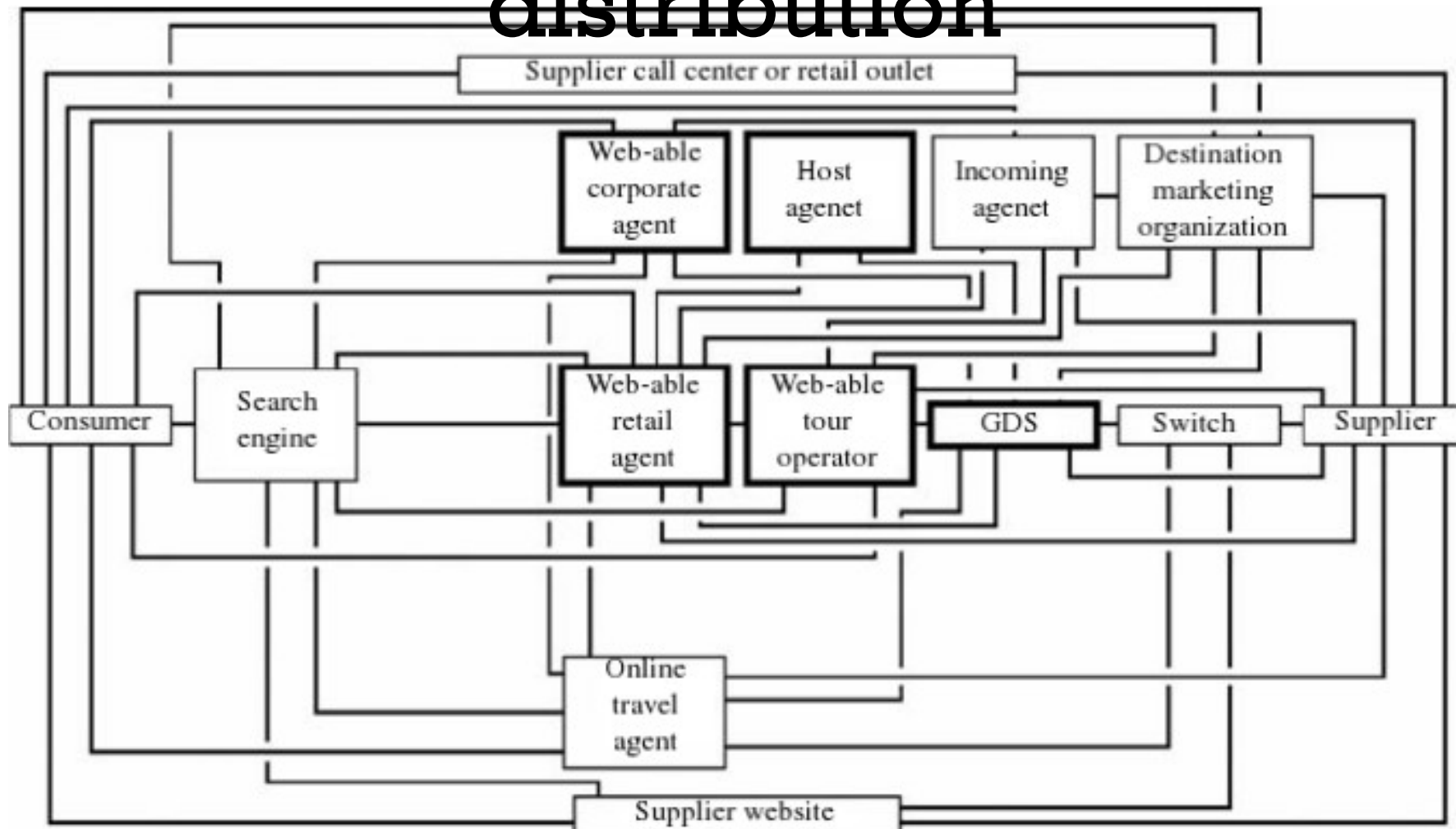
- Online travel represents 35% of all travel related sales*
- Online travel sales grew by 10% in 2014 vs. growth of 4.3% for travel in general
- Mobile sales will represent 50% of online travel revenues in 2016
- Millennials and GenY search and book through mobile at higher level = 56%

*Not including sales from corporate services such as Concur or Egencia

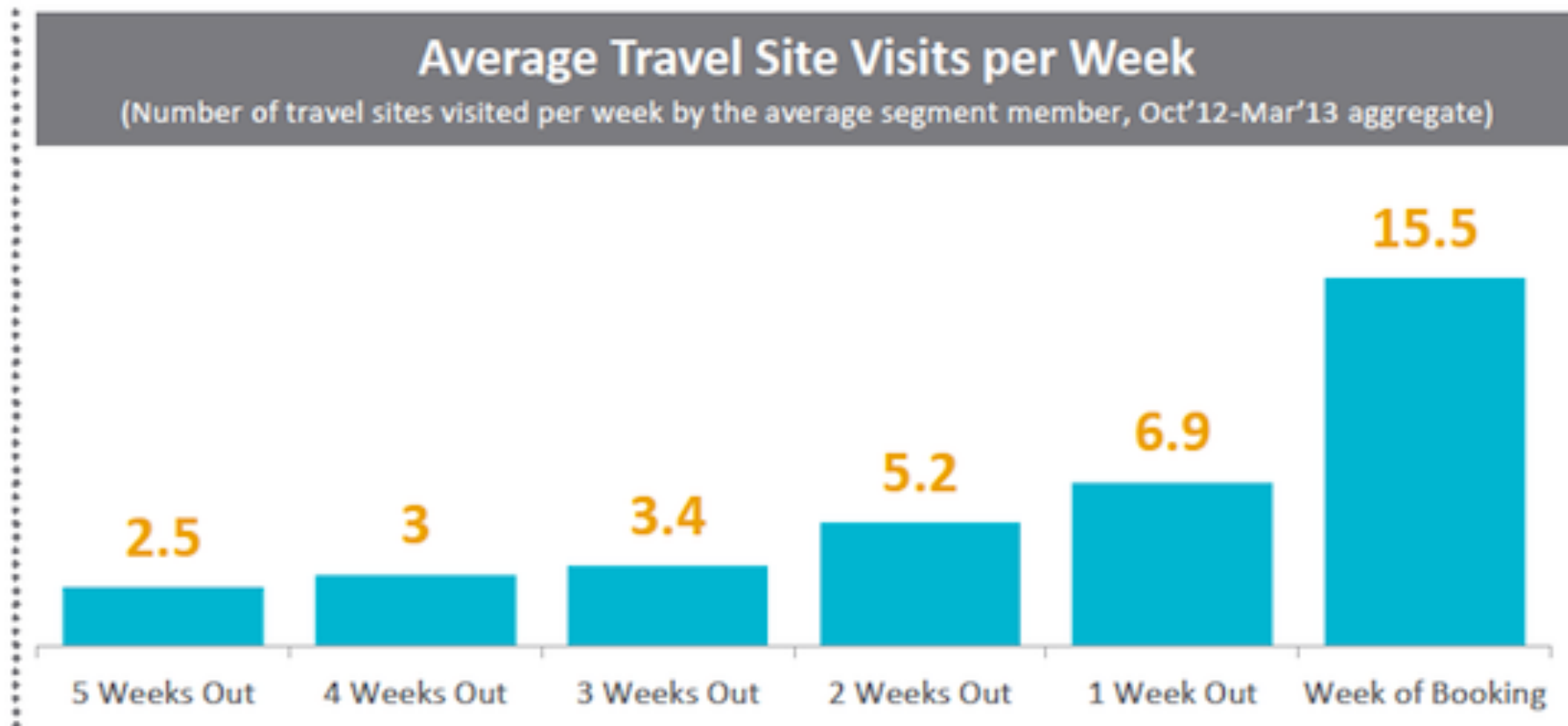
**LONG LONG LONG LONG
LONG LONG LONG LONG
LONG LONG LONG LONG
LONG LONG LONG LONG
LONG LONG LONG LONG
TIME A GO . . .**



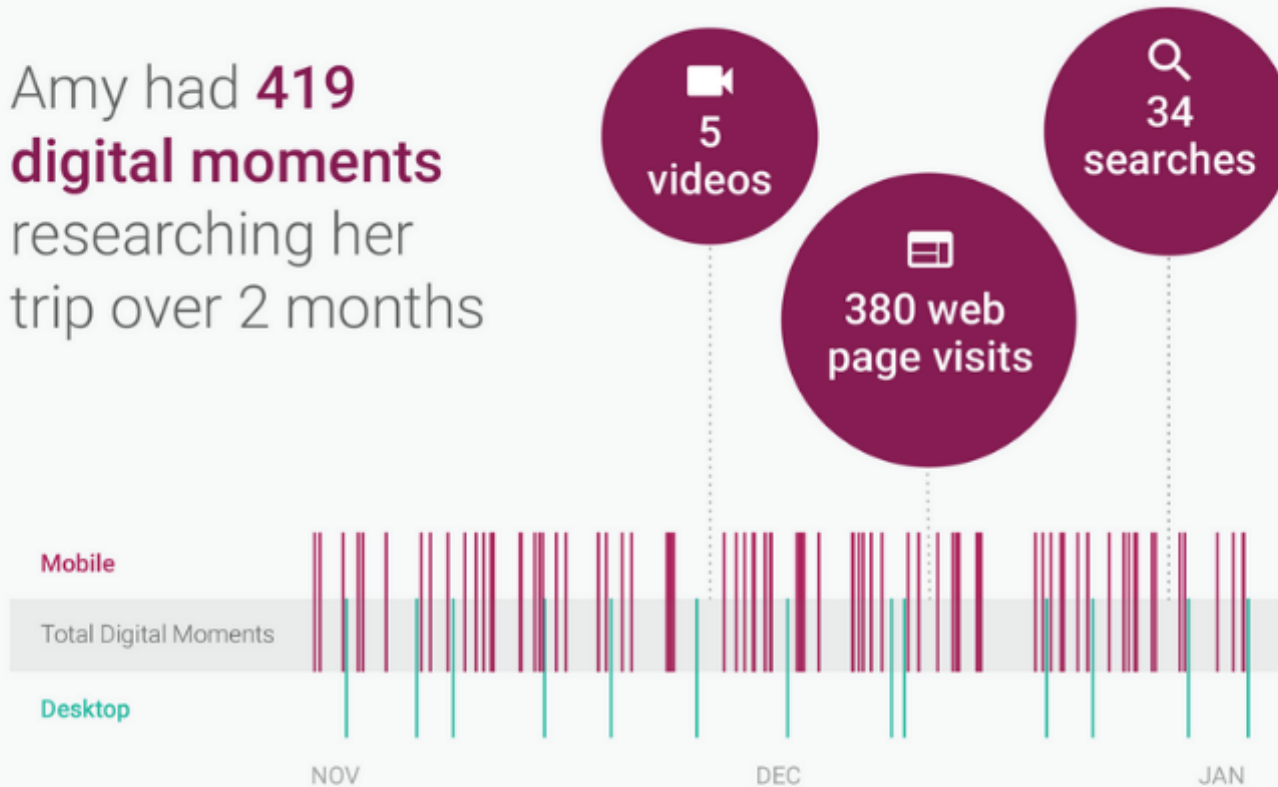
2. Evolution of travel distribution



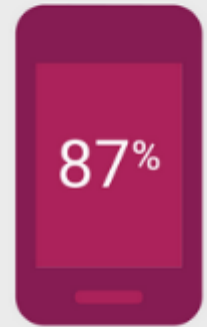
Average travel site visits: 38



Amy had **419**
digital moments
researching her
trip over 2 months



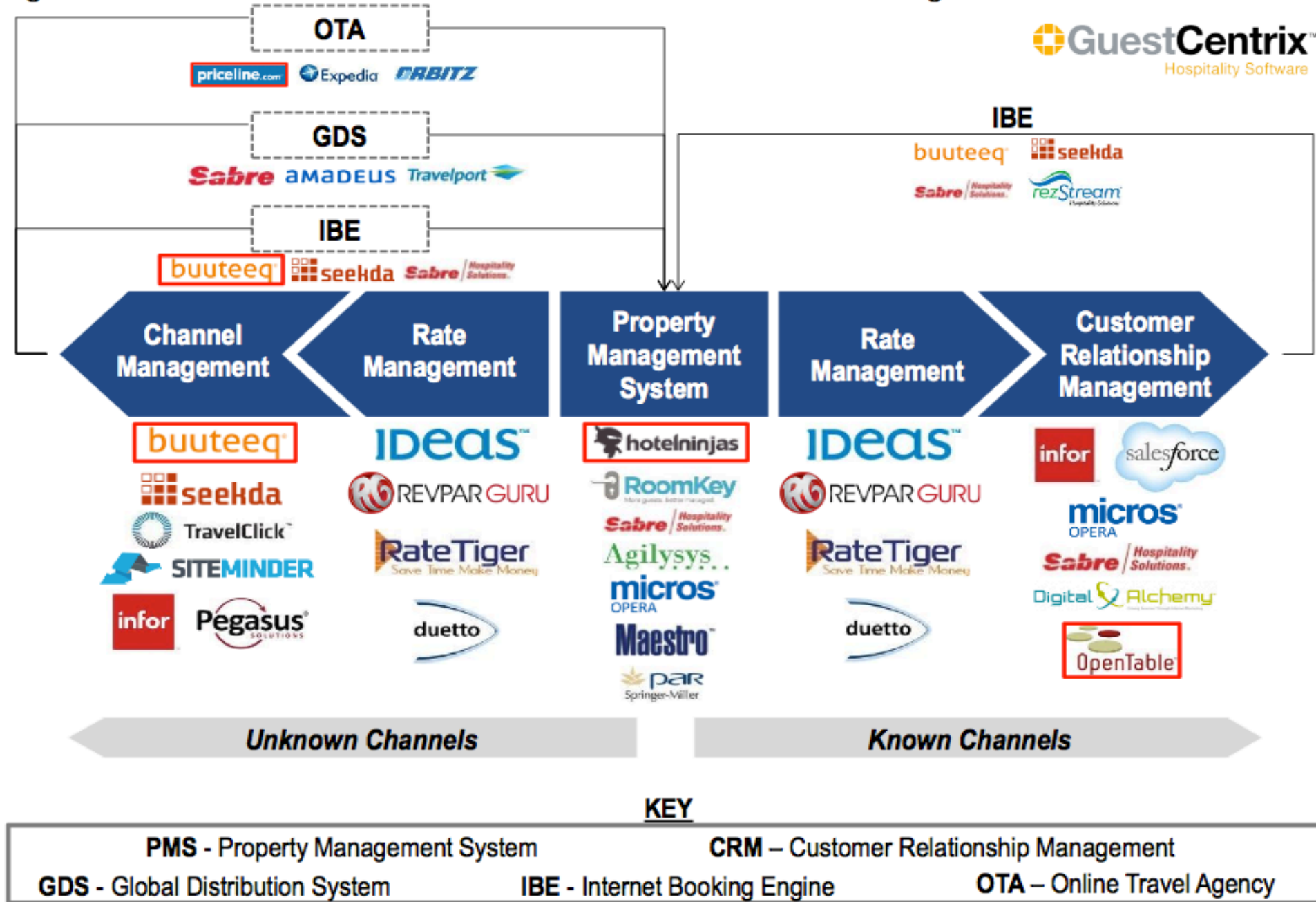
Luth Research, March 2015.



87%
of these
digital moments
happened on
mobile

Source: Luth Research ZQ Intelligence™ - Cross Platform Digital Behavior Measurement, Nov-Dec 2014.

Figure 4. Breakdown of Various Point Solution Providers in Context of Marketing Channels



2. Prevalence of OTAs

Company	Domestic Gross Bookings	Total Gross Bookings	Total Revenue	Market Cap
Priceline Group	\$1.54 Billion	\$10.11 Billion	\$1.68 Billion	\$49.1 Billion
Expedia Inc.	\$5.85 Billion	\$10.12 Billion	\$1.2 Billion	\$7.33 Billion
TripAdvisor	N/A	\$32.7 Million *	\$246.9 Million	\$11.19 Billion
Orbitz Worldwide	\$2.47 Billion	\$3.1 Billion	\$225.8 Million	\$1.07 B
Travelocity	N/A	N/A	\$206 Million **	N/A
CheapOair	N/A	\$67.7 Million ***	N/A	N/A

Source: Skift Report, 2013

2. Prevalence of OTAs





Expedia



Priceline



An Evolving Landscape

expedia.com tripadvisor.com
yapta.com lonelyplanet.com travelocity.com
priceline.com hotels.com
orbitz.com hotwire.com
kayak.com travelzoo.com virtualtourist.com

JETSETTER

livingsocial



GROUPON
Collective Buying Power



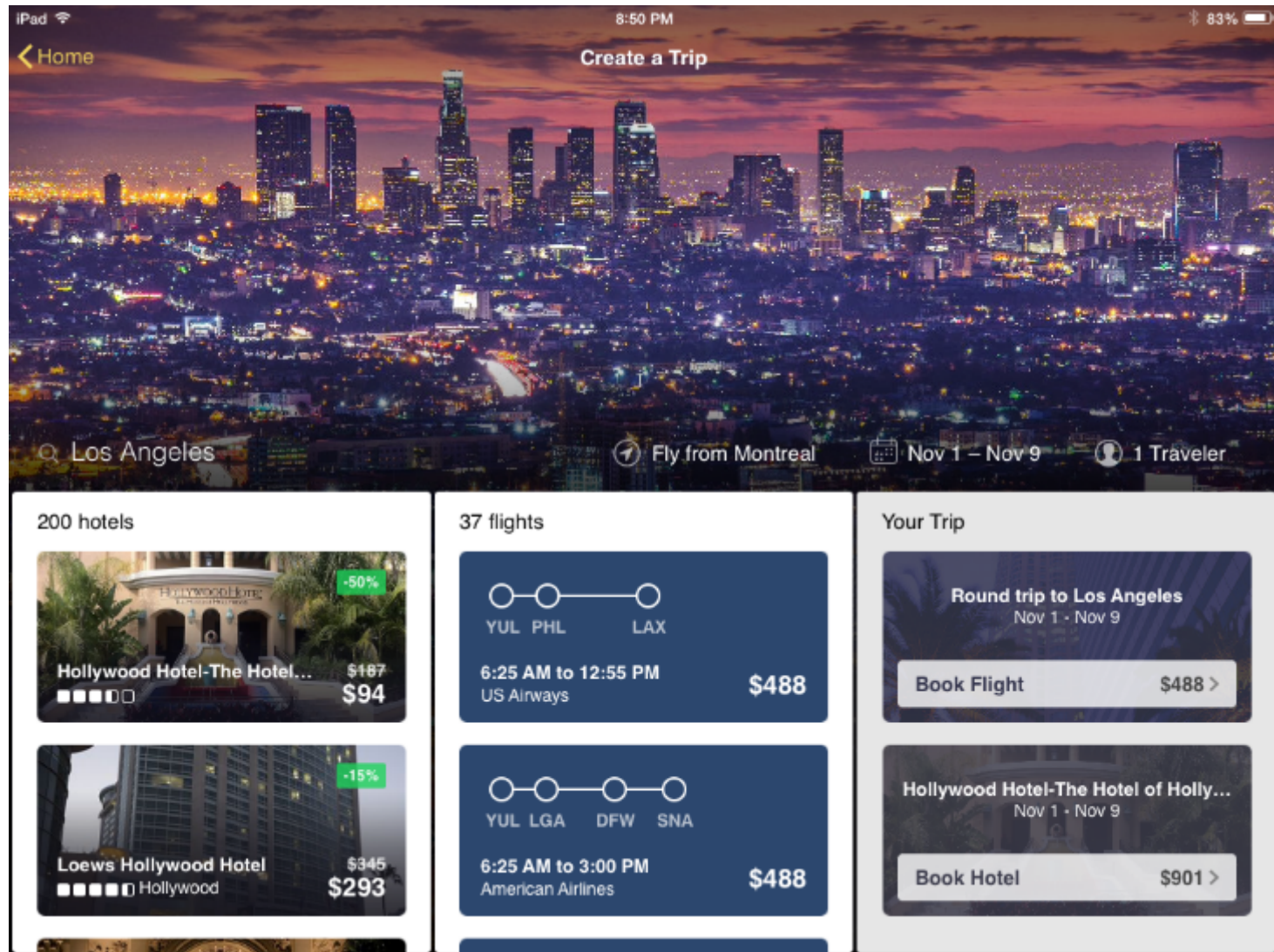
WagJag.com

Evolving Behaviors

Booking Window Distribution of Hotel Bookings on
Hotel and OTA Mobile Websites
May-December 2013

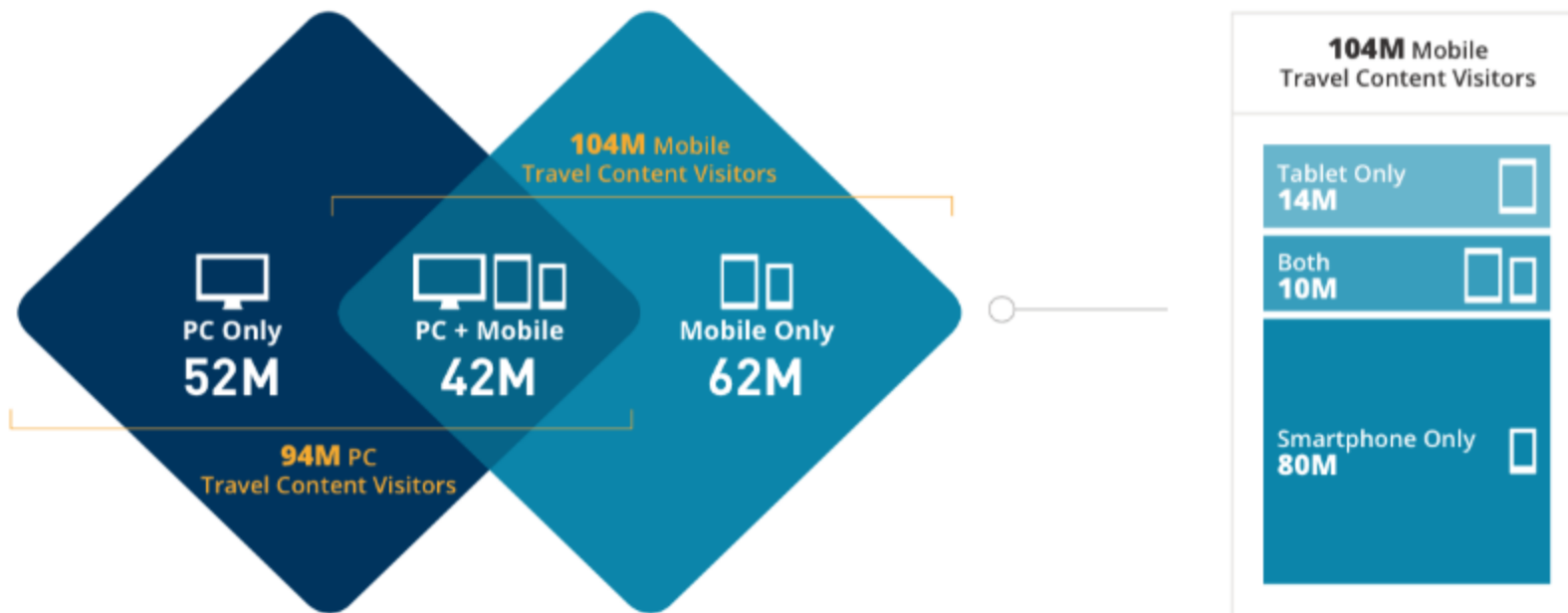


Mobile Domination



Mobile Domination

156M PEOPLE (+11% YOY)
ENGAGE SPECIFICALLY WITH TRAVEL CONTENT

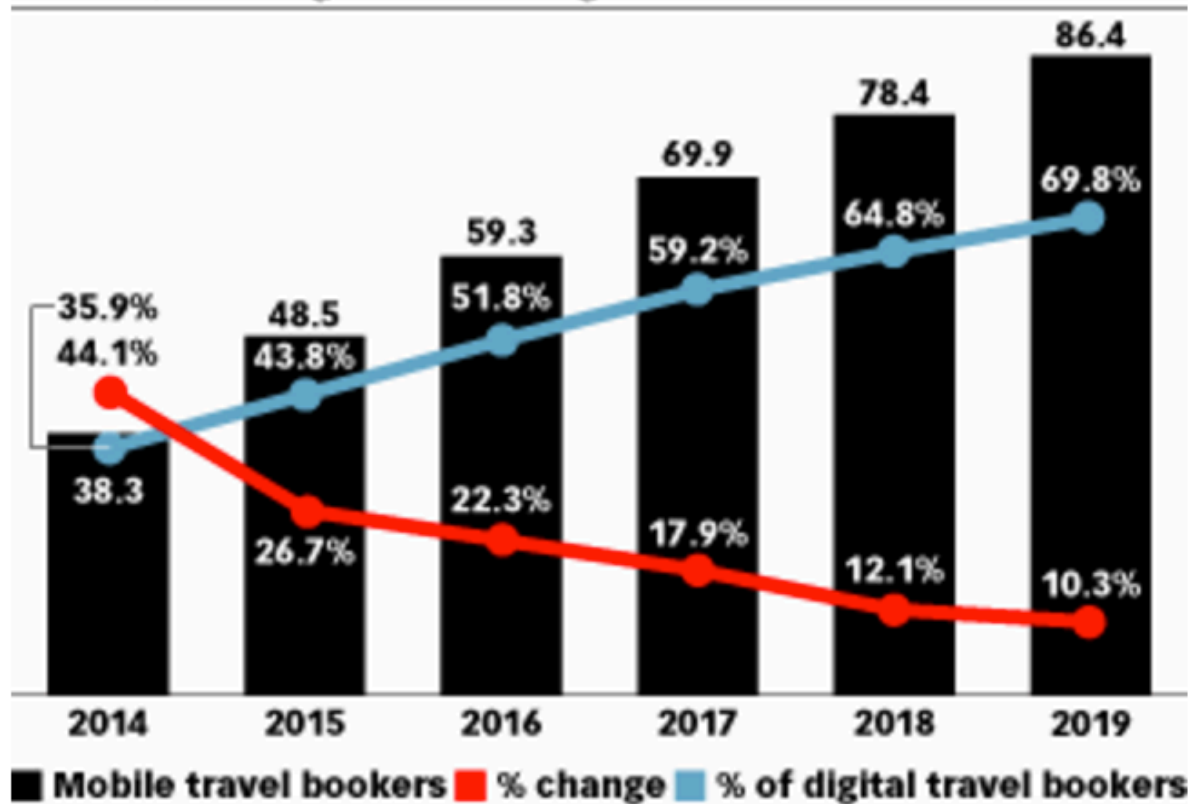


For more on this: [The Multiscreen Evolution of Travel Decisions](#)

Mobile Domination

US Mobile Travel Bookers, 2014-2019

millions, % change and % of digital travel bookers



Note: ages 18+; mobile device users who have booked travel via mobile device at least once during the calendar year

Source: eMarketer, Nov 2015

Not to mention sharing platforms...



Pros & Cons of OTAs

PROs

- Incremental Sales & Revenues
- Marketing Clout
- Billboard Effect

CONs

- Rate Parity & Integrity
- Advertising Rights (AdWords)
- Loyalty to OTA brand
- Commission levels

In the US, OTAs will represent 58% of US independent properties' online bookings in 2015 compared to just under 50% of the share for chains. European hotels are even more dependent with intermediaries representing almost three quarters of independent hotel online bookings in 2015.

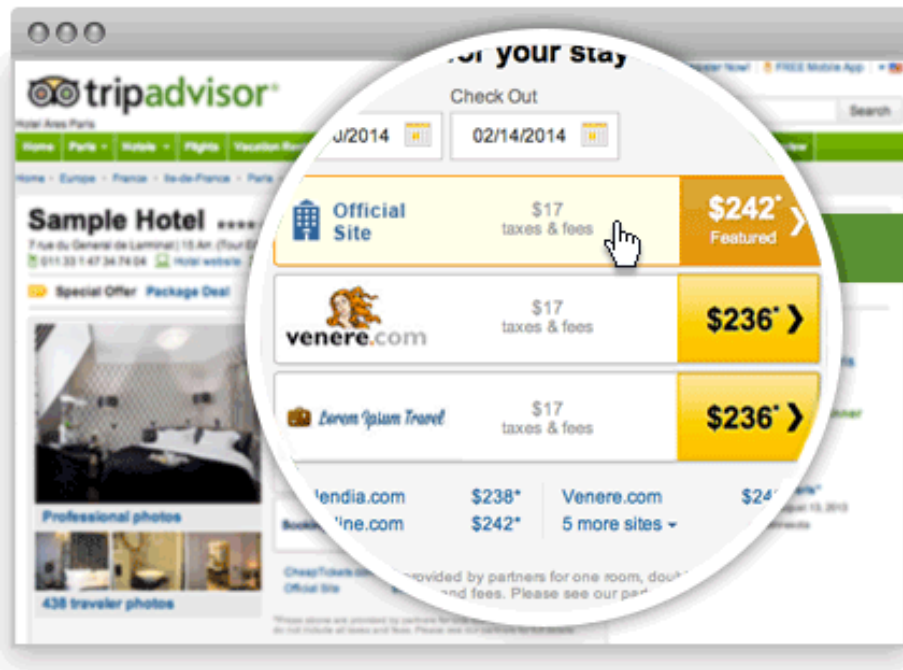
Tnooz, 26 November, 2015

3. What role for TripAdvisor ?

- Over 315M unique visitors monthly
- 225+ million reviews written by 67 million active users
- 77% of users consult TripAdvisor for accommodations!
- Direct relationship between your TA ranking and RevPAR

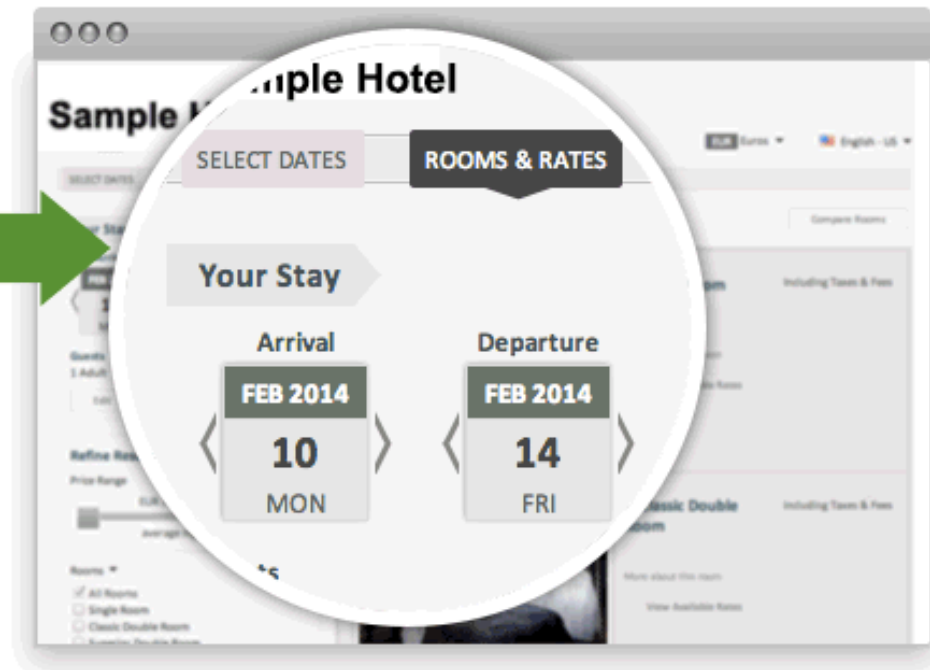
TripConnect

How does it work?



On your TripAdvisor page

Travelers see your direct rate and availability, and click to access your website



On your booking page

Travelers go straight to your website's booking page, where they can easily book directly with you.

3. What role for TripAdvisor ?

Bruce County Hotels

PriceFinder Check In Check Out Show Prices

Sort by: Just for You Ranking Price (low to high) Price (high to low) Distance

Accommodation

- Hotels (39)
- B&B and Inns (70)
- Speciality Lodging (29)
- Vacation Rentals (300)
- Hotels with Special Offers (7)

Price per night

Enter dates & see best prices

Hotel class

- ★★★
- ★★
- ★

Style

Budget

Super 8 Port Elgin
511 Reviews
#3 of 39 hotels in Bruce County
Special Offer: Plan Ahead and Save 20%
Book 2+ Days Ahead & Get 20% On Week Day Stays Of 2... Read more

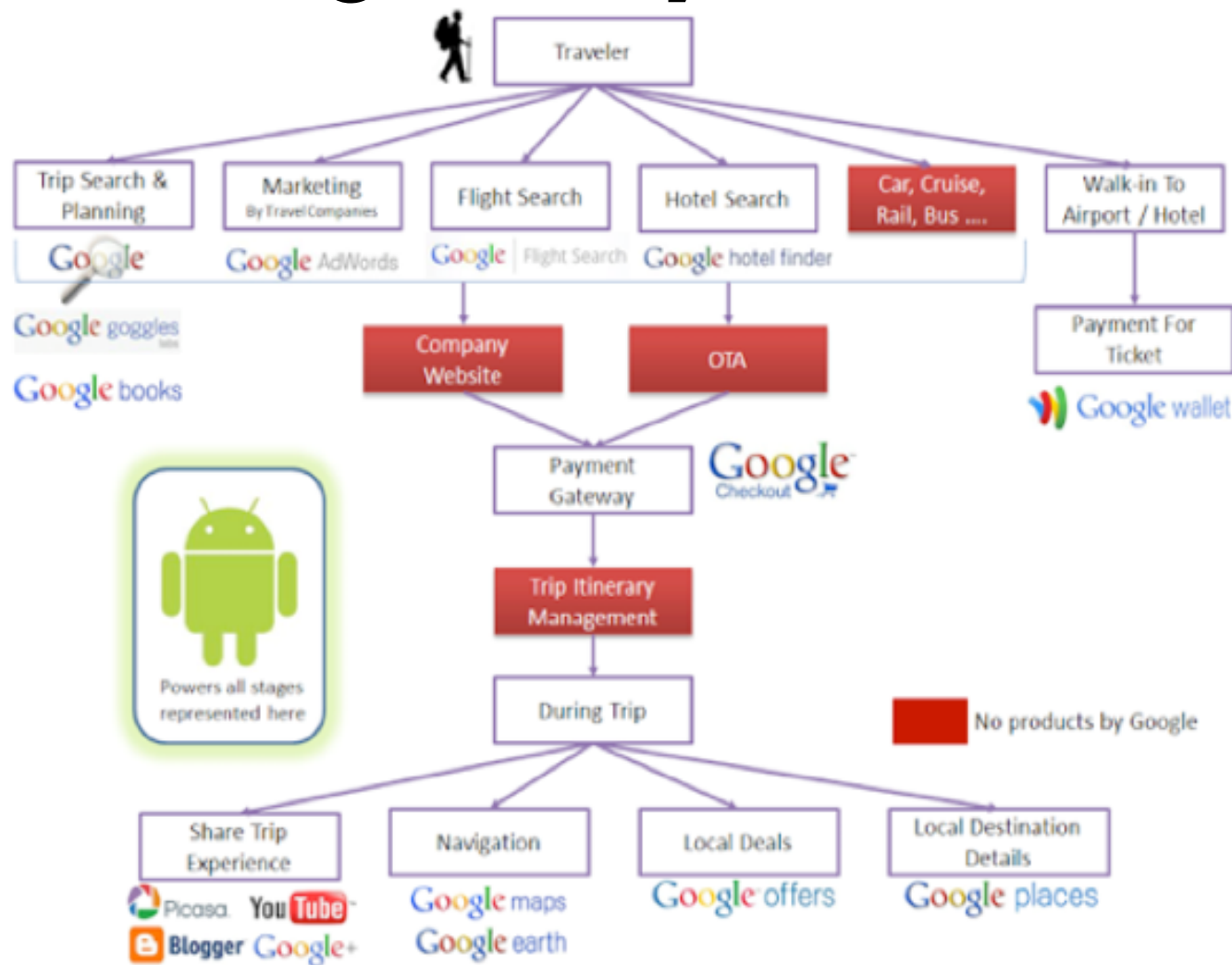
BEST WESTERN PLUS Walkerton Hotel & Conference Centre
128 Reviews
#1 of 39 hotels in Bruce County
"Lovely property, excellent staff" 27/11/2015
"Weekend in Walkerton" 26/11/2015
Green Free Breakfast Pool

Bel-Air Motel & Cottages Sauble Beach
27 Reviews
#2 of 39 hotels in Bruce County
"Very very clean" 30/09/2015
"Relaxing Vacation" 29/09/2015
Free Parking

3. What role for TripAdvisor ?

The screenshot displays the TripAdvisor website for "Bruce County Hotels". The top navigation bar includes the "PriceFinder" logo and buttons for "Check In", "Check Out", and "Show Prices". Below this, there are filters for "Accommodation" (Hotels, B&B and Inns, Speciality Lodging, Vacation Rentals, Hotels with Special Offers) and "Price per night" (Enter dates & see best prices). The main content area shows a list of hotels, each with a thumbnail image, a "Slide show" button, and a "SPONSORED" label. The first hotel listed is "Super 8 Port Elgin" with 511 reviews and a "Special Offer: Plan Ahead and Save 20%". The second hotel is "Waterview on The Bay" with 270 reviews and a "Great View" rating. The third hotel is "Quality Inn" with 88 reviews and a "business trip" rating. Each hotel listing includes a "Check In", "Check Out", and "Show Prices" button.

4. Google, beyond search





hotels in grey county



Grey County, Canada. Book Your Hotel Now Booking.com

Ad www.booking.com/ ▼

Grey County Hotels. No reservation costs. Great rates.

Read Real Guest Reviews · We speak your language · Best Price Guarantee

Ratings: Selection 9/10 - Customer service 9/10 - Website 9/10 - Travel info 9/10

Deals Special Offers - Free Cancellation - Best Price Guarantee

Hotels.com Official Site

Ad www.hotels.com/ ▼ +1 866-417-7101

Lowest Price Guaranteed on Top-Rated Hotels.

Types: Hotels, Motels, B&Bs, Inns, Hostels

"Online Travel Service Brand of the Year" – 2015 Harris Poll EquiTrend

Hotels in Toronto - Hotels in Ottawa - Hotels in Banff - Last Minute Deals

Hotels grey county - TripAdvisor.ca

Ad www.tripadvisor.ca/Hotels ▼

TripAdvisor: the trusted website to help you find the perfect hotel.

Hotels near grey county

Sun, Dec 13

Mon, Dec 14

Price ▼ Rating ▼ Hotel class ▼

The Westin Trillium House, Blue Mountain

\$159

4.4 ★★★★★ · 4-star hotel

Upscale hotel with Italian dining

220 Gord Canning Drive



Travelodge Owen Sound ON

\$68

2-star hotel

Simple hotel with free WiFi & breakfast

880 10th St E



Hilltop Motel

Unfussy property with a pool & BBQ area

300 S Sykes St

Visit
website



More places

Ads

Hotels - Expedia.ca®

www.expedia.ca/Hotels ▼

More Choices, Best Prices, Trusted.

Book Now & Save up to 50% on Hotels

trivago™ Hotel Finder

www.trivago.ca/Hotel-Finder ▼

trivago™ Save Up To 78% on Hotels.

trivago™ #1 Hotel Search Engine!

\$19/nt Cheap Hotels

www.goseek.com/Hotel-Discounts ▼

1000s of Deals. Last Minute Prices.

Up to 30% off the Leading Low Rate.

Hotwire® Cheap Hotels

www.hotwire.com/Cheap-Hotels ▼

Get 4-Star Hotels at 2-Star Prices

and Save up to 60%. Book Now!


Old Sturbridge Inn

www.osv.org/ ▼

Historic inn and modern motor lodge

Enjoy free Internet and breakfast!

[See your ad here »](#)




[Back to web results for hotels in grey county](#)

The Westin Trillium House,... **\$159**

4.4 ★★★★★ - 4-star hotel

Modern property with an Italian restaurant, a heated outdoor pool & a fitness center.

220 Gord Canning Drive




Travelodge Owen Sound ON **\$68**

2-star hotel

Straightforward roadside lodging with free WiFi & continental breakfast, plus a business centre.


880 10th St E



Hilltop Motel

Straightforward rooms in a low-key motel offering a BBQ patio, heated outdoor pool & free WiFi.

300 S Sykes St




Travellers Inn Hanover

3.9 ★★★★★

No-frills property offering casual rooms & suites with flat-screen TVs, microwaves & free WiFi.


244 7 AVE



Best Western Inn On The ... **\$160**

4.3 ★★★★★ - 3-star hotel

Laid-back lodging with a bay-view restaurant, plus free breakfast, WiFi & parking.



The Westin Trillium House, Blue Mountain ★

4.4 ★★★★★
4-star hotel

\$159
per night

Address: 220 Gord Canning Drive, The Blue Mountains, ON L9Y 0V9

Phone: (705) 443-8080

Set 3.8-km from Craigeleith Ski Club, this mountain property is also 6.3-km from Craigeleith Provincial Park. ... [More](#)



Ads **Book a room**

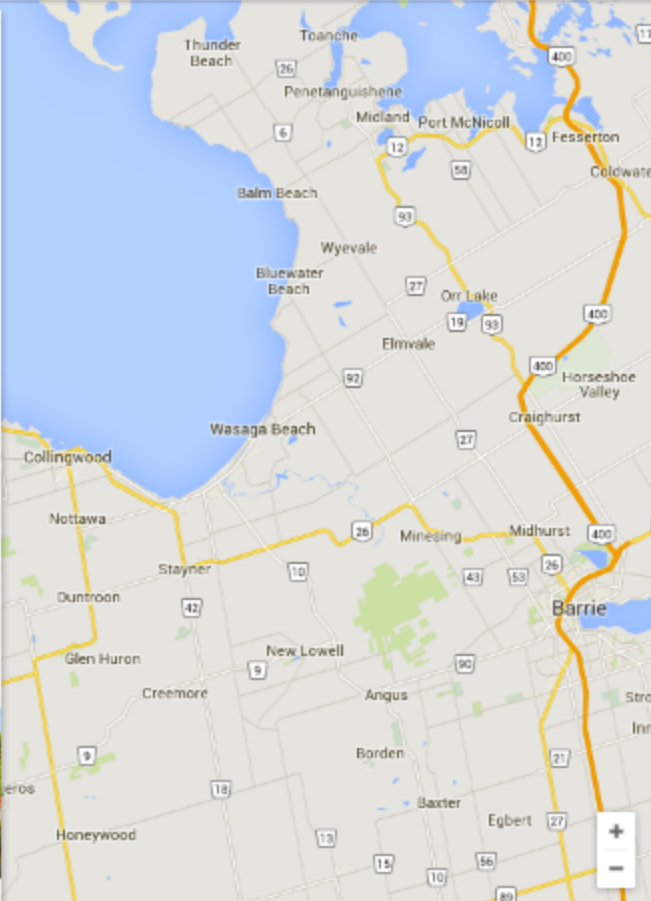
Check in Check out

Expedia.ca
Best Price Guarantee · Member-Only Deals **Book from \$167**

Westin.com · Official website **Book from \$159**

[View more rates](#)



By @gonzogonzo

“OTAs, Friends or Foes?”

www.fredericgonzalo.com

4. Google, beyond search

Example of Google Hotel Finder Limited Offer

Ad 30% off - Limited offer



W San Francisco

4.0 ★★★★★ 221 reviews

4-star hotel

Stylish Hotel geared toward business travelers, located downtown, across from Moscone Convention Center & Yer...

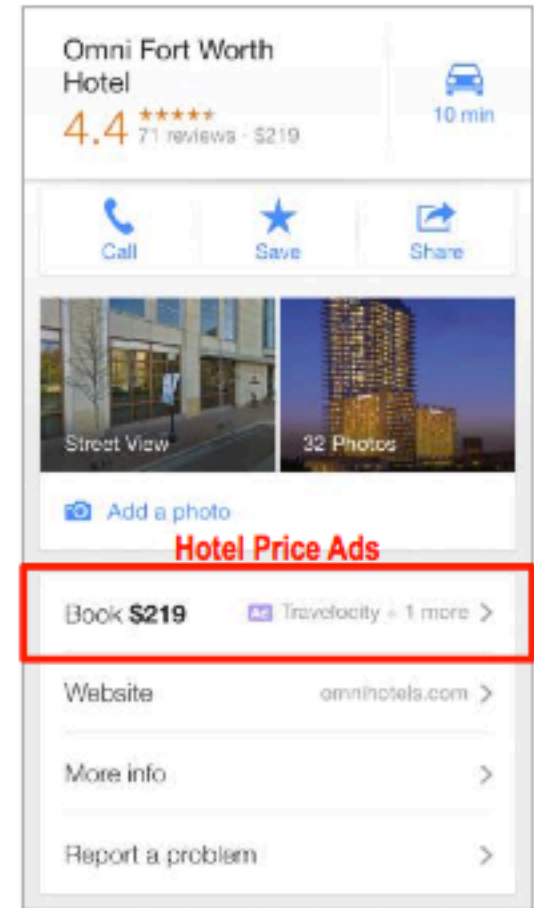
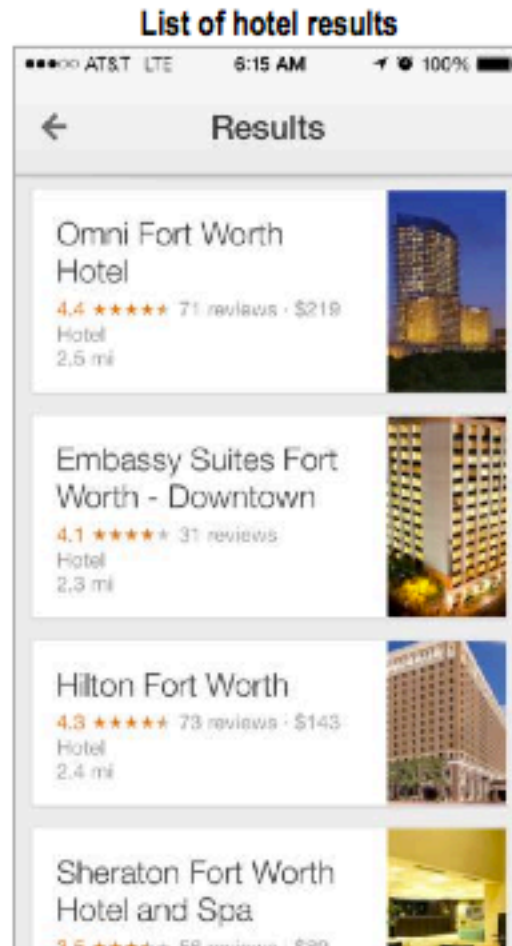
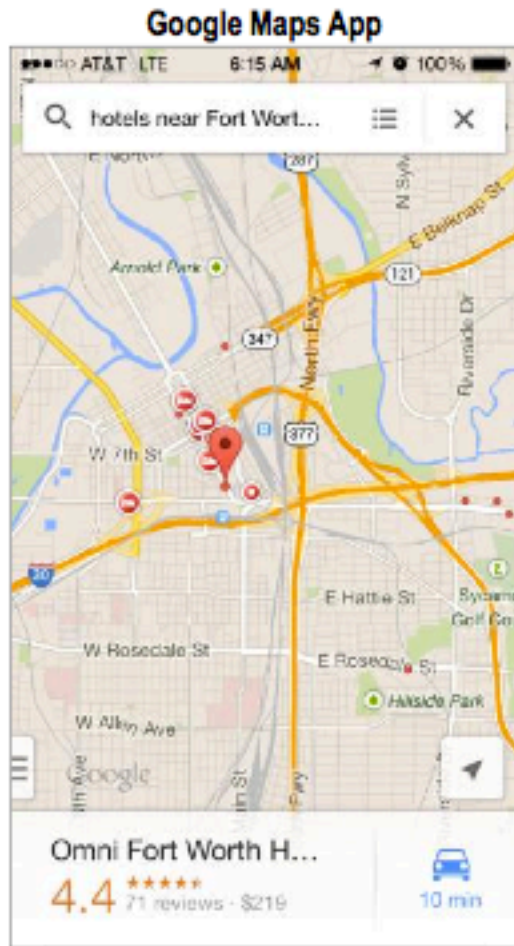
Standard price \$399

Limited offer **\$282**
per night

Book now



4. Google, beyond search



5. Tips to fight back!

1. Build & maintain a solid email database
2. Replicate OTA best practices online
3. Automate communications to clients
4. Create unique packages exclusive to your site
5. Have a warranty and let it be known!

A solid email database

Le NOUVEL HÔTEL & Spa
MONTREAL

REVEZ ET ÉPARGNEZ /
COME BACK AND SAVE **\$25**

NOM / NAME _____

COURRIEL / EMAIL _____

PRÉNOM / FIRST NAME _____

DATE DU DERNIER SÉJOUR / DATE OF LAST STAY _____ **1379**

Applicable sur votre prochaine réservation, uniquement sur notre site internet: **www.lenouvelhotel.com** ou par téléphone: **1-800 363-6063** et mentionnez le code: **LNH25**. Cette offre ne peut être jumelée avec aucune autre promotion, ou tarifs négociés. Un coupon par séjour et ne peut être échangé en argent, doit être présenté à l'arrivée.

Applicable on your next reservation only valid on our web site: **www.lenouvelhotel.com** or by phone at: **1-800 363-6063** and mention the code: **LNH25**. This offer can not be combined with any other reservations discount offer or promotion.

◆ One coupon valid per stay and can not be exchanged for money.

OTA Best Practices

Work Leisure ?

Check-in Date
Mon 14 December 2015

Check-out Date
Tue 15 December 2015

1-night stay

Guests 1 adult, 0 children

Search

Filter by:

▼ Popular for Business Travelers

- ☐ Breakfast included 18
- ☐ Wi-Fi 65
- ☐ Parking 68
- ☐ Airport Shuttle 5
- ☐ Fitness Center 17
- ☐ Free cancellation 49

▼ Price (per night)

- ☐ CAD 0 - CAD 70 12
- ☐ CAD 70 - CAD 140 45
- ☐ CAD 140 - CAD 210 21
- ☐ CAD 210 - CAD 280 5
- ☐ CAD 280 + 14

▼ Star Rating

- ☐ 2 stars 17
- ☐ 3 stars 17
- ☐ 4 stars 7
- ☐ Unrated 27

Grey County: 15 out of 104 properties available

Order by: Our Top Recommendations Price Review Score

Only hotels with at least 3 reviews by business travelers will be taken into account.



Grey Rose Suites ★★★★★

Hanover

deal : 3

We'll likely sell out of rooms at this hotel within the next 2 days.

Last booked: 20 hours ago

King Suite FREE cancellation - PAY LATER
You can cancel later, so lock in this great price today!

We have 2 rooms left!

Kitchen 8.7

Wonderful 9.3

Rated by 41 guests after their stay

CAD 120

PAY LATER

Select your room >



Knights Inn Owen Sound ★★

Owen Sound

deal : 16

Latest Booking: yesterday

Double Room

We have 2 rooms left!

Kitchen 7.5

Excellent 8.8

Rated by 236 guests after their stay

CAD 55

Select your room >



Travellers Motel

Owen Sound

deal : 8

Last booked: 23 hours ago

Double Room FREE cancellation - PAY LATER
You can cancel later, so lock in this great price today!

We have 1 room left!

Good 7.6

Rated by 150 guests after their stay

CAD 50

PAY LATER

Select your room >

OTA Best Practices

Booking.com

Home → Canada → Ontario → Simcoe → Search results

8,338 properties 1,978 properties 5 properties Simcoe, 1 adult, 1 Night (Dec 14 - Dec 15) [Change dates](#)

Search

Destination/Hotel Name:

Simcoe

☒ Work ☐ Leisure

Check-in Date: Mon 14 December 2015

Check-out Date: Tue 15 December 2015

1-night stay

Guests: 1 adult, 0 children

Search

Filter by:

Popular for Business Travelers

- ☐ Breakfast included 10
- ☐ Wi-Fi 16
- ☐ Parking 16
- ☐ Fitness Center 3
- ☐ Free cancellation 15

Price (per night)

- ☐ CAD 0 - CAD 70 2
- ☐ CAD 70 - CAD 140 10

Simcoe: 5 out of 20 properties available

Order by: **Our Top Recommendations** Price Distance from downtown Review Score

Only hotels with at least 3 reviews by business travelers will be taken into account

The Country Doll House B&B

Simcoe

deal

Reservation possible without a credit card

2 Twin Room with Shared Bathroom

FREE cancellation - PAY LATER Breakfast Included

You can cancel later, so lock in this great price today!

Exceptional 9.8

Rated by 32 guests after their stay

CAD 100

PAY LATER

Select your room >

Travelodge Simcoe ★★

Simcoe

Good 7.7

Rated by 38 guests after their stay

CAD 88

Select your room >

Comfort Inn Simcoe ★★

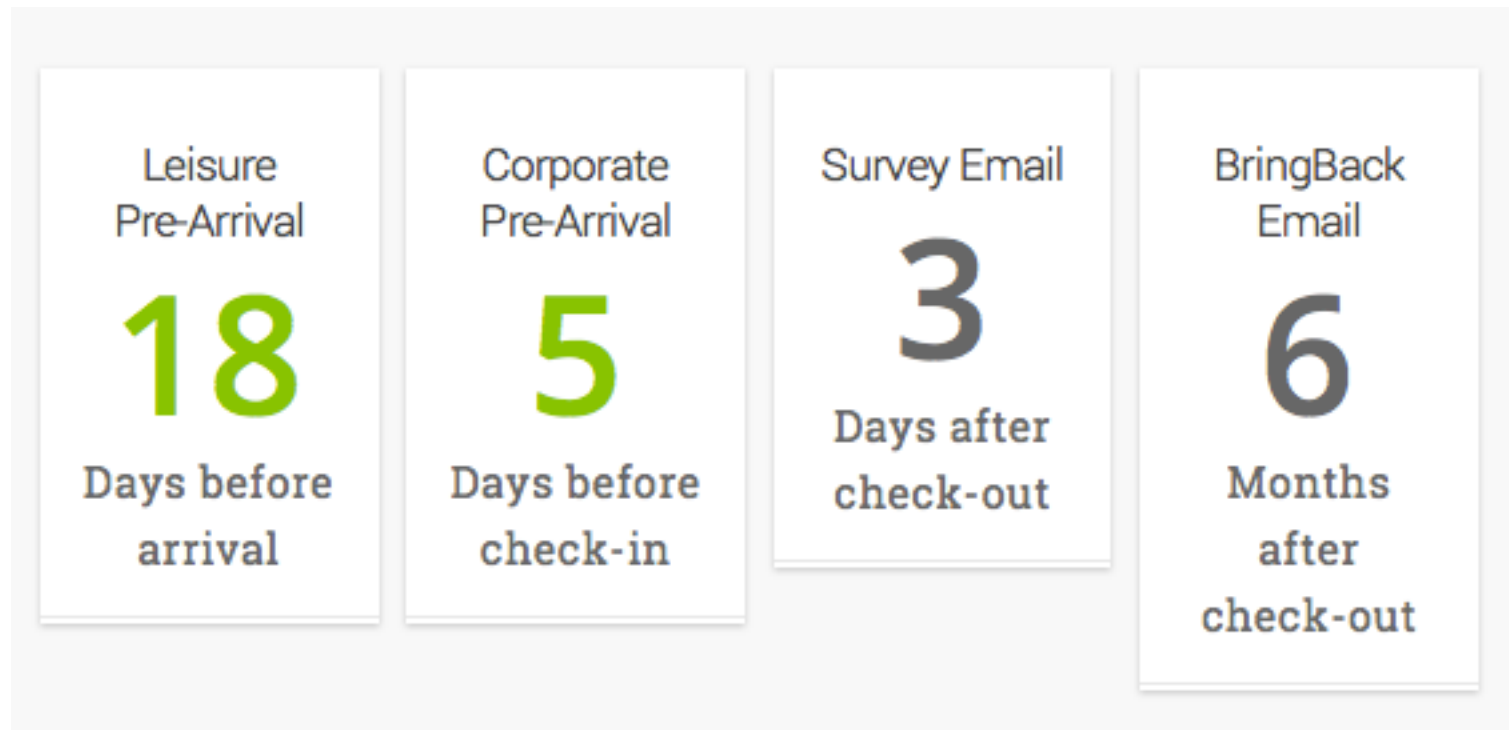
Simcoe

Very good 8.1

Rated by 58 guests after their stay

Just booked!

Automate communications



Booking.com

Un an déjà... Bon anniversaire !



Frederic, Saint-Émilion, ça vous rappelle quelque chose ?

Il y a un an, vous avez réservé un séjour à l'établissement La Petite Madeleine, Saint-Émilion. Nous avons pensé que vous apprécieriez un petit rappel de votre séjour.

"Accueil chaleureux et amical des hôtes, Thor et Veronique. "

[Consultez votre commentaire sur Booking.com](#)

2k

Personnes ont lu votre commentaire

8,33

Votre note pour cet établissement

[Nous avons des milliers de nouveaux hébergements à vous proposer. Imaginez toutes les possibilités !](#)

Create unique packages

The screenshot displays the website for the InterContinental Toronto Centre, specifically the 'Romance Package' page. At the top, there's a navigation bar with the GONZO logo and the text 'RTO7 - 2015'. Below this is a large banner image showing a couple dining at a restaurant. The main content area is divided into several sections:

- REVIEWS:** A section showing 7 reviews with a star rating and buttons to 'Read' or 'Write' a review.
- Check-In/Out:** A booking section with fields for Check-In (11/30/2015), Check-Out (12/01/2015), Rooms (1), Adults (1), and Children (0), followed by a 'BOOK NOW' button.
- REASONS TO STAY:** A section titled 'Exciting Weekend and Getaway Packages' with a star rating.
- ABOUT US:** A sidebar with links to 'E-Map', 'Things To Do', 'Photo Gallery', 'Press', 'Email Offers', and 'Green Initiatives'.
- ROMANCE PACKAGE:** The main content area, featuring the title 'ROMANCE PACKAGE', a breadcrumb trail 'Home > Specials & Packages > Romance Package', and social media sharing buttons for Facebook, Twitter, and Google+. The text describes a 'Romantic Getaway in Toronto' and includes a paragraph about the experience. Below this is a list of inclusions for the 'Toronto Romance Package Includes' and a 'BOOK NOW' button.
- PACKAGES:** A sidebar with a list of package options: 'Ripley's Aquarium', 'Romance', 'Shopping', 'Spa Express', 'Event Day', and 'Seasonal Packages'.

The bottom of the page features a large image of a hotel room and a 'BOOK NOW' button.

Highlight a warranty



+ Share Like 33

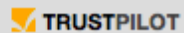
Your booking 100% confirmed.

Any problems and we'll give you \$50.

Excellent



8,910 customers
have written a review
on Trustpilot



It's very unlikely that something will go wrong with your booking. In fact we're so confident, that if your booking details cannot be found at check-in, we'll credit your account with your full deposit and an additional \$50 towards future bookings.

None of our competitors will guarantee your booking quite like this.


**Bookings
100%
Guaranteed**

» [Make a Claim](#)

» [Terms and conditions](#)




Bonus Tip: Chat Service


Live Chat by  LIVEPERSON

 END CHAT

Thank you for contacting Disney. Please hold while we route your chat to a Disney Cast Member who will help you with your question.

Welcome to Disney! My name is Watson. How may I help you today?


 Chat




Last but not least



Are customers abandoning bookings because of your online payment process?

[Comment](#) [Like \(0\)](#) [Save \(2\)](#) [Share](#) [Print](#)

Apr 14, 2015

Almost 50% of customers abandoned their online travel booking early because of payment-related problems according to new research from Worldpay. Who would have thought the payment process has such a big impact on shoppers?

NB: This is an analysis by Thomas Helldorff, vice president travel at Worldpay.

If you have dropped out of the checkout in the last 12 months, what was the reason?

The checkout process took too long	15%
I had to enter too much information	18%
The payment method I wanted to use wasn't available	18%
The payment process wasn't clear enough	12%
I was concerned if the website was secure	18%
I started the payment process but there was an error and I didn't complete it	18%

Questions? Comments?



Email: frederic@gonzomarketing.biz or 418.951.5488