



A GUIDE TO THE EVOLUTION OF THE ONLINE REVIEW INDUSTRY IN EUROPE



1 What to remember about the main portals

	<u>5</u>
A PROLIFIC YEAR FOR GOOGLE	<u>5</u>
TRIPADVISOR	<u>6</u>
FACEBOOK	<u>7</u>

2 Points to remember from 2018

	<u>9</u>
EVOLUTION IN FRANCE AND BELGIUM	<u>9</u>
EVOLUTION ON THE GERMAN-SPEAKING MARKET	<u>11</u>
EVOLUTION ON THE SPANISH MARKET	<u>12</u>
EVOLUTION ON THE ITALIAN MARKET	<u>13</u>
TO SUM UP...	<u>14</u>
FOCUS ON THE NET PROMOTER SCORE	<u>15</u>

3 Which portal do guests prefer to use when looking for a hotel?

	<u>21</u>
UNITED KINGDOM	<u>21</u>
FRANCE	<u>22</u>
GERMANY	<u>22</u>
ITALY	<u>23</u>
SPAIN	<u>24</u>

4 A few words to conclude

26

1

What to remember about the main portals

A PROLIFIC YEAR FOR GOOGLE

TRIPADVISOR

FACEBOOK

2018 saw the tourism industry at the heart of technological innovation once again. Following the study we conducted last year on the [evolution of guest reviews and portals](#), we're giving you a recap of the key changes from 2018 so you can better anticipate what 2019 has in store.

If, as a hotel owner, you do your best every day to innovate in order to attract more guests and keep them satisfied, the internet giants that are Google, TripAdvisor and Facebook cannot be ignored. Indeed, they've implemented a number of actions to improve the guest journey and experience, for example in the booking and review process.

Google A PROLIFIC YEAR FOR GOOGLE

The evolution of Google and its functions in the travel sector was particularly significant in 2018. This could be seen in four trends.

- 1. Google Hotel Ads.** Ads on Google are not a new phenomenon. However, some [new features](#) have been added, such as an improved photo display, availability and the prices charged by an establishment. This can also be seen in Maps, where the process for booking directly from the search results has been simplified.
- 2. Google Travel.** Google is continuing to develop in the travel sector with this [intelligent hub](#) which allows you to centralise your searches to understand your preferences and thus offers you the best and most appropriate predictions, suggestions and prices for your next trip. Hotels, flights, restaurants... everything has been revised with a fine-tooth comb to offer a tailor-made experience and the relevant choices.
- 3. Google Assistant.** This is certainly the most significant innovation, where artificial intelligence is at the service of companies to facilitate interaction with their clients. [The introduction of Duplex at their I/O conference](#) simulates making an appointment at the hairdresser's, but it's also reasonable to imagine how hotels could use this feature in the future.
- 4. Chat for My Business.** Live chat is a recurring trend amongst users of digital technology who seek to incorporate this type of feature in

the hotel industry. However, it does have some disadvantages. Despite being as automated as possible, it nevertheless still requires a person to be available 24/7, 7 days a week. This option is also available via Facebook Messenger, which lots of hotels use. Lastly, on Google My Business, the link to the website and the phone number are already efficient ways to contact a hotel.



5. Beyond changing algorithms at roughly the same pace as the other sites, networks and portals, TripAdvisor has taken a big step forward, seeking to establish itself more as a [social network](#). What does this mean? Quite simply, as with the other sites, you can personalise your profile by sharing content and recommendations. TripAdvisor thus strengthens its position as a source of travel inspiration, as well as allowing users to make bookings (via other platforms) and leave reviews.

6. TripAdvisor also had people talking at the end of 2017 through the scandal of the [fake restaurant in London](#) which reached first place in the rankings. A few months later, the platform found itself in the spotlight again, but this time for a good reason, after [suing an Italian company](#) for posting fake reviews. Fake reviews are, unfortunately, a recurring problem and affect both hotel owners and guests, thus representing a real issue for TripAdvisor's and other review portal's credibility. Internet users no longer dare to trust what they read, and hotel owners have to find ways to [get fake reviews taken down](#) to avoid bad publicity.

facebook

Often used as a source of travel inspiration, the #1 social network has gradually made a name for itself amongst the big review platforms. Last year it experienced an increase in the number of reviews generated, which has only fueled its ambitions. For professionals, Facebook

launched [Trip Consideration](#) in 2018, allowing hotel owners (and other players in the tourism industry) to target their potential guests and clients more effectively thanks to a vast range of options.

From the consumer's perspective this time, we noticed a major change concerning guest reviews. Indeed, Facebook reviews have given way to [recommendations](#), the aim of which is to give a broader overview of the guest experience.



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Points to remember from 2018

EVOLUTION IN FRANCE AND BELGIUM

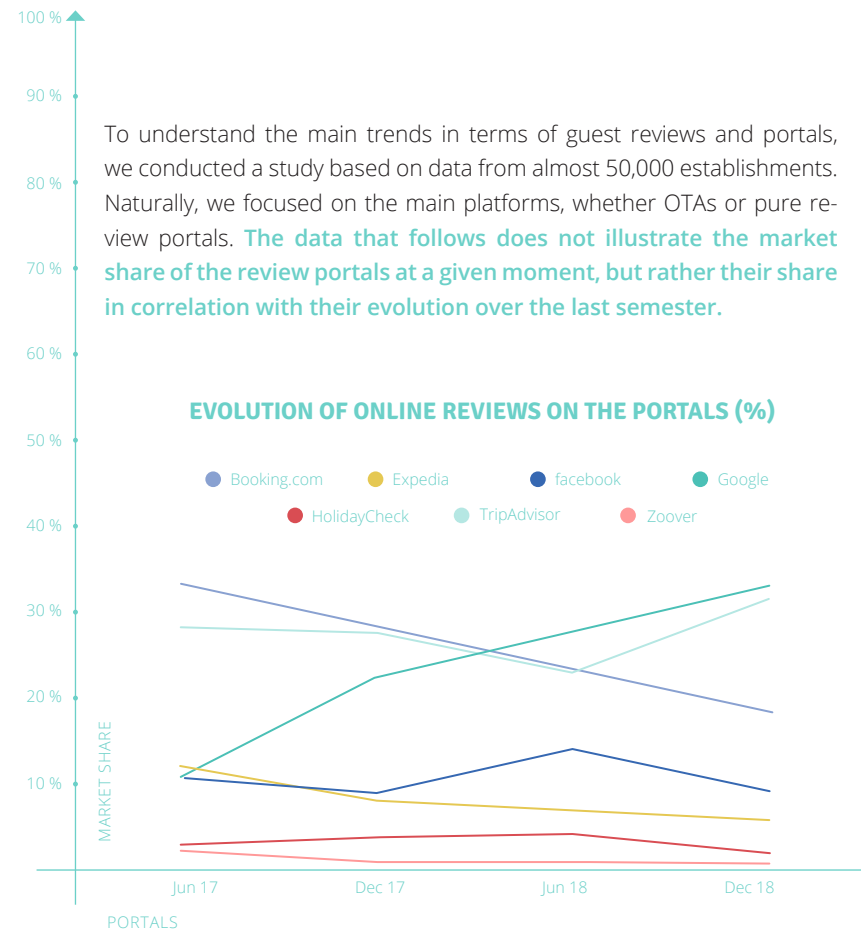
EVOLUTION ON THE GERMAN-SPEAKING MARKET

EVOLUTION ON THE SPANISH MARKET

EVOLUTION ON THE ITALIAN MARKET

TO SUM UP...

FOCUS SUR LE NET PROMOTER SCORE



First, it is necessary to highlight that this data comes from several European countries, namely France, Belgium, Germany, Switzerland, Austria, Italy and Spain. It is indeed important to maintain a global overview of these trends before taking a closer look at each particular case.

So can we learn from this data? What stands out immediately is the drastic change in leadership between Google and Booking.com from June 2018. Although the OTA giant Booking.com obviously remains a key player in the sector, we noticed a constant decrease in the number of reviews it generates from guests who made a booking on its platform, going from a market share of 33.4% to 18.2% in relation to the other sites between June 2017

and December 2018. This should not be viewed as a drop in the number of reviews in absolute terms, but rather as a slowdown. Additionally, the significant progress made by other portals, Google in particular, strengthens this trend. Indeed, the search engine, which is constantly innovating in the tourism sector notably via its guest reviews, saw its share triple over this same period, from **10.6% to 33.1%**. It is also reasonable to imagine that these developments are the fruit of the vast discrepancy between the return rate for the post-stay emails sent by Booking.com to collect reviews and the ease with which reviews can be written on Google. Furthermore, as mentioned, the American giant seems to be increasingly investing in the travel sector, which means that hotel owners and guests alike are now more inclined to attach greater importance to it and continue to fuel its growth.

TripAdvisor, the traditional goal post for guest reviews, at least for public opinion, saw a small increase and maintained its second place. This increase was, however, too small to stop Google's rapid evolution. Moreover, [its CEO Steve Kaufer recently confirmed his desire to focus on tours and other activities](#), so does this mean we should expect a decline in the number of guest reviews left for hotels in future? With regard to Facebook, which is not to be outdone in its capacity to invest and innovate in the travel industry, we did notice a slight drop, which can simply be explained by the change that took place recently concerning guest reviews, which are now known as Recommendations.

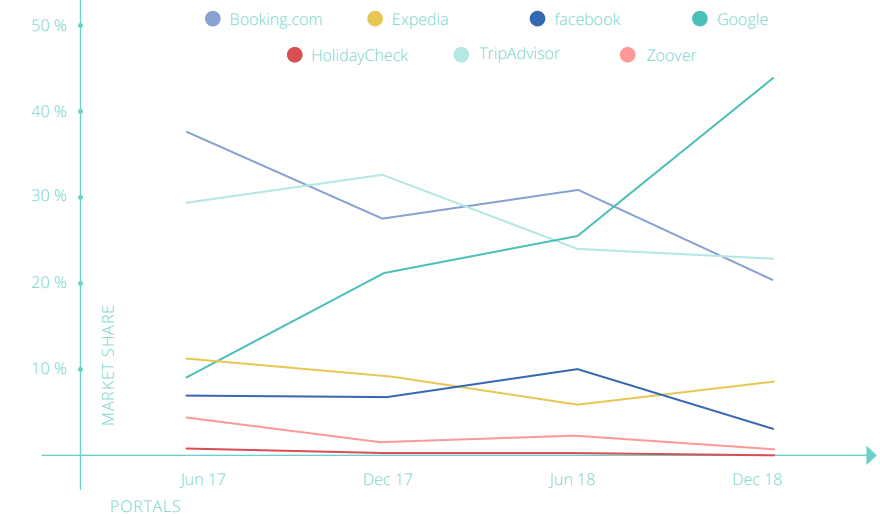
Facebook is now, more than ever, a force to be taken seriously. Expedia, following in the trend of its historical competitor, Booking.com, suffered a 5% drop in reviews generated between June and December. Our last two platforms, Zoover and HolidayCheck, are gradually disappearing from this global overview. This can be explained by the fact that they focus on specific markets, Dutch- and German-speaking respectively.

Naturally, each market sees different developments. Consumer habits vary from country to country, and, therefore, so too does the popularity of each platform. We continued our study across several markets in order to get the clearest idea of the specificities of each one.

EVOLUTION IN FRANCE AND BELGIUM

Certainly one of the most influential markets in terms of nights stayed and establishments in operation, France and Belgium, grouped together in this study, present data which follows the global trends.

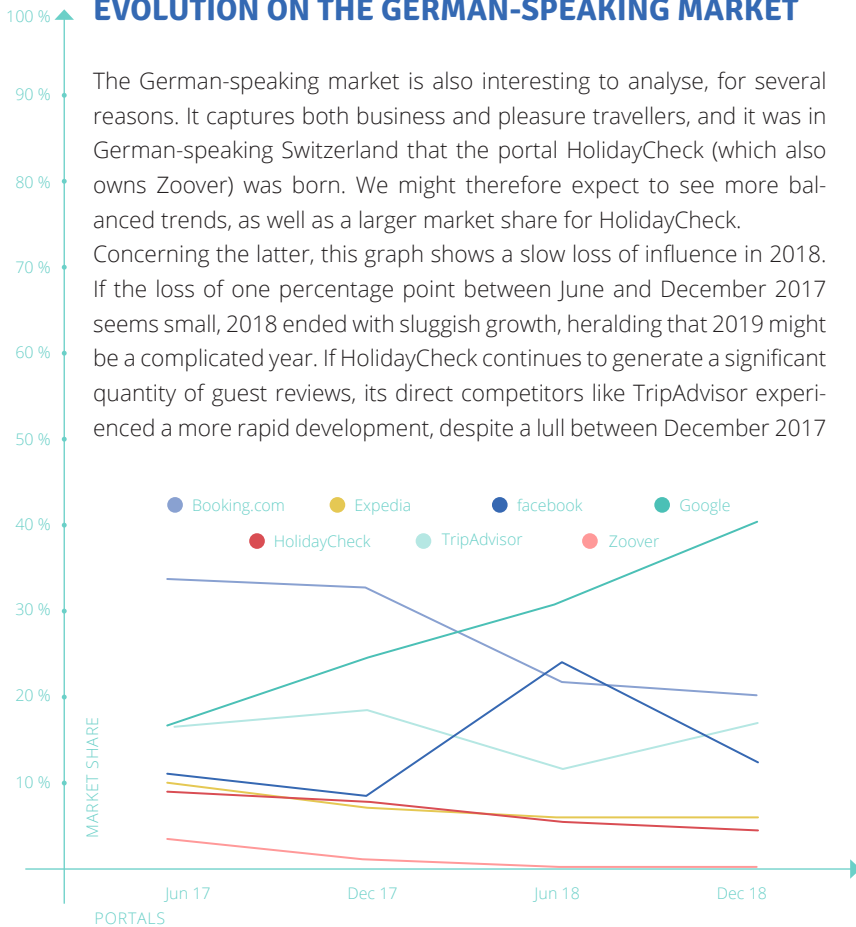
A notable point is TripAdvisor's loss of momentum. If it maintains a strong position among the platforms analysed, it has been trading water somewhat in terms of evolution. Its development between June and December 2017 was 32.7%. One year later, over the same period, it lost almost 10 percentage points, dropping to just 23%. This was notably due to the



remarkable disruption caused by Google which, over the same period, experienced an increase of over 20 percentage points, propelling it to 43.9% between June and December 2018 compared to just 21.4% the previous year. We may wonder whether this trend will continue. There is a strong chance that the leading platforms will continue to dominate the debate, but which one will be in which position? It also remains to be seen how Facebook recommendations will be welcomed by users, and if so, TripAdvisor could have a serious competition on its hands.

EVOLUTION ON THE GERMAN-SPEAKING MARKET

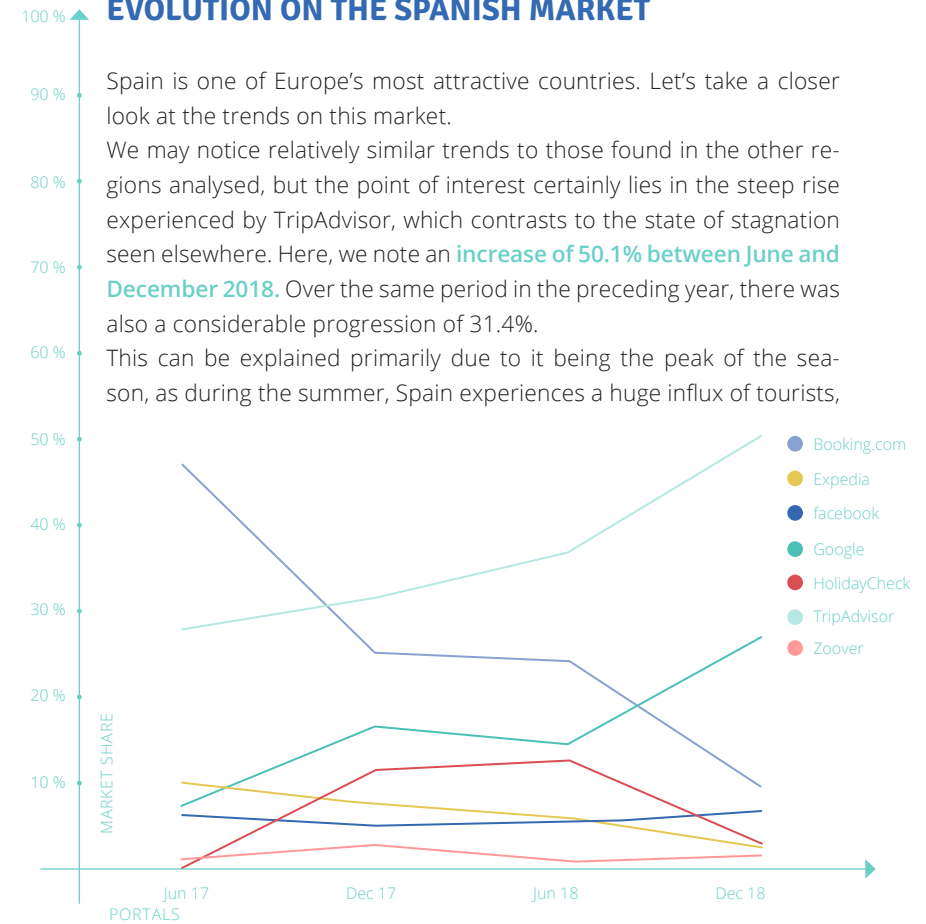
The German-speaking market is also interesting to analyse, for several reasons. It captures both business and pleasure travellers, and it was in German-speaking Switzerland that the portal HolidayCheck (which also owns Zoover) was born. We might therefore expect to see more balanced trends, as well as a larger market share for HolidayCheck. Concerning the latter, this graph shows a slow loss of influence in 2018. If the loss of one percentage point between June and December 2017 seems small, 2018 ended with sluggish growth, heralding that 2019 might be a complicated year. If HolidayCheck continues to generate a significant quantity of guest reviews, its direct competitors like TripAdvisor experienced a more rapid development, despite a lull between December 2017



and June 2018. The fact that HolidayCheck left the Polish market could be seen either as a general weakening or a decision to focus on its main market, that is German-speaking countries. Meanwhile, Google confirms its trend of rapid global growth here with more impressive figures, jumping up to 40.4% of reviews generated between June and December 2018, that is twice the figure recorded by Booking.com. Remember, however, that the OTA remains at the top if we look exclusively at the volume of reviews generated, but its growth remains slower.

EVOLUTION ON THE SPANISH MARKET

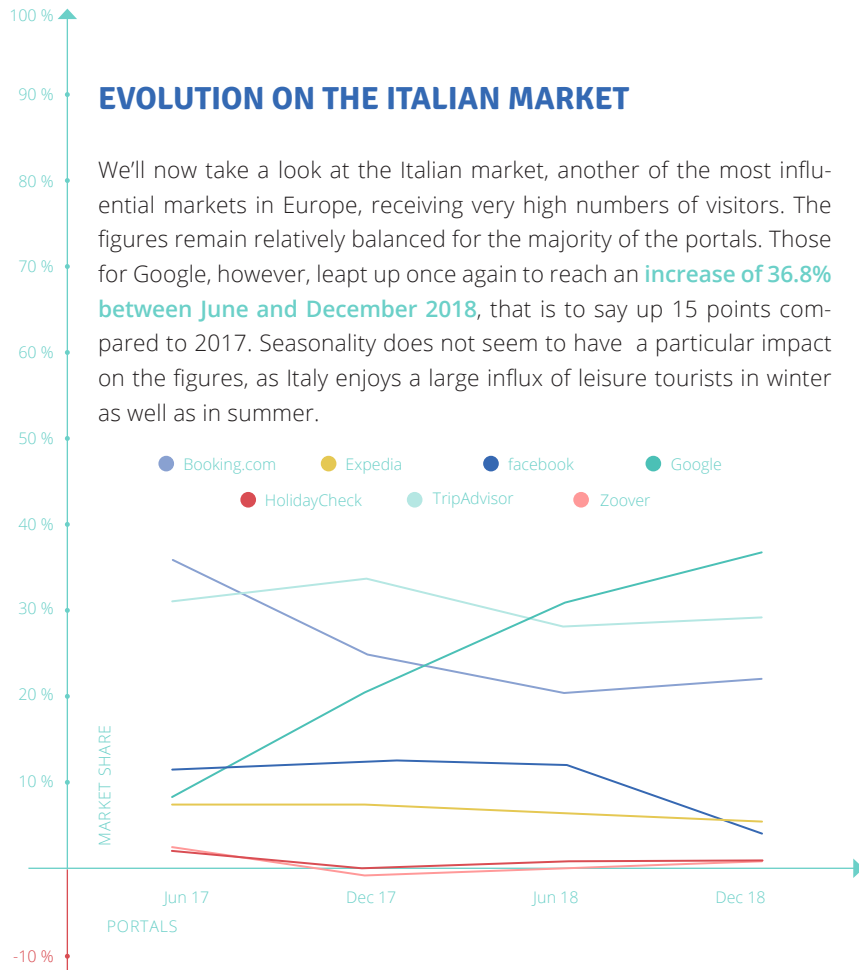
Spain is one of Europe's most attractive countries. Let's take a closer look at the trends on this market. We may notice relatively similar trends to those found in the other regions analysed, but the point of interest certainly lies in the steep rise experienced by TripAdvisor, which contrasts to the state of stagnation seen elsewhere. Here, we note an **increase of 50.1% between June and December 2018**. Over the same period in the preceding year, there was also a considerable progression of 31.4%. This can be explained primarily due to it being the peak of the season, as during the summer, Spain experiences a huge influx of tourists,



which has direct repercussions on reviews being written. In contrast, between December 2018 and June 2017, TripAdvisor's figures only went up by five percentage points. Google continues its serene progress on all the markets and gained over 12 points between June and December 2018. Booking.com, like on other markets, suffered a fall on the Spanish market, with just 9% growth between June and December 2018, far from the 25% noted the previous financial year.

EVOLUTION ON THE ITALIAN MARKET

We'll now take a look at the Italian market, another of the most influential markets in Europe, receiving very high numbers of visitors. The figures remain relatively balanced for the majority of the portals. Those for Google, however, leapt up once again to reach an **increase of 36.8% between June and December 2018**, that is to say up 15 points compared to 2017. Seasonality does not seem to have a particular impact on the figures, as Italy enjoys a large influx of leisure tourists in winter as well as in summer.



TO SUM UP.....

As in 2017, Google has continued its rapid progression and, considering the investments it has made, it seems likely that this trend will continue. TripAdvisor, despite experiencing relatively stable growth, is seeing its influence decline in favour of the search engine, which has now become a multi-faceted platform. Online shop front, review portal, price comparison tool... Google acts as all of these and soon, perhaps, also a booking management tool with [Google Assistant](#). Hotel owners must

remain aware of these developments to be able to take full advantage of these portals and the impact they can have on their establishment in the best way possible. It's crucial to have 360° visibility to be able to attract different guest groups and to be present where your competitors are not. In addition, integrating guest reviews on your own website remains the ultimate way to win the trust of internet users and secure direct bookings.

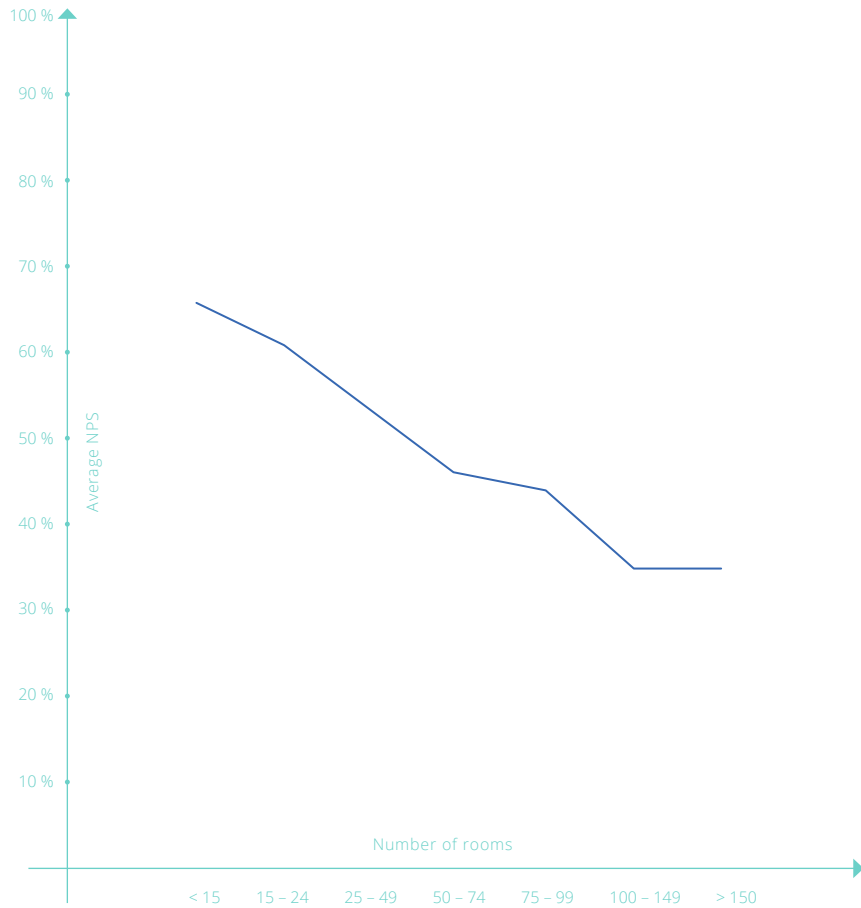
FOCUS ON THE NET PROMOTER SCORE

In 2017, Customer Alliance integrated the [Net Promoter Score into its questionnaires](#) to give hotel owners an extra tool to help them better understand guest satisfaction levels and the likelihood of their guests recommending their hotel to friends and family.

To conclude 2018, we conducted a study to analyse guests' sentiment about an individual experience in a hotel. The question specific to the NPS remains a simple one: *How likely would you be to recommend us to a friend or colleague?* The study included 1,124 hotels which had activated the NPS in their Customer Alliance questionnaire during 2018.

The main result from this study was that the average NPS for the establishments surveyed was 51, a very positive score given that the NPS scale spans from -100 to 100. Knowing that each hotel differs in terms of the number of guests it can welcome, its location and its type of guest, we sorted these results into several criteria, namely number of rooms, guest segmentation (couples, business travellers and families) and country.

It seems logical to note the trend that **the more rooms a hotel has, the less likely it is that a guest will recommend it**. Naturally, when examining the satisfaction criteria, we can imagine that it becomes difficult for a hotel to personalise the guest experience when it reaches a certain size. The feeling of intimacy and closeness with the hotel staff and other indications of attentiveness are, of course, far easier to notice in small establishments.

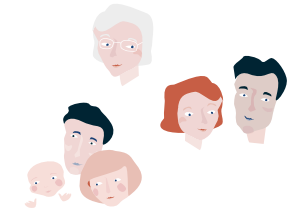


Country	Average NPS
Germany	46
France	54
Italy	59



It's difficult to extract a trend from this data. Indeed, even though there is a gap between these three countries, the guests who completed the questionnaires for the hotels could themselves come from different countries. Nevertheless, when looking at the number of rooms in the hotels surveyed, we can note a certain coherence. In Germany, the average number is 60, in France it is 36 and in Italy it is 41. Once more, we note a link between the NPS and the number of rooms. It's the gap between Italy and Germany that is particularly striking. There are, of course, other criteria to take into account, as demonstrated by the following data relating to the type of guest.

Type of guest	Average NPS
Business	45
Couples	51
Families	54



Here, in contrast, it is interesting to observe the gap between the different segments. Business guests are visibly more demanding, despite awarding a score which suggests they would be very likely to recommend a hotel. This can be explained relatively easily. A guest travelling on business has more precise and strict needs and expectations. For example, this type of guest will be more critical about the location of the hotel (close to the conference centre or station) or the WiFi because their work depends on it. Details as simple as having an ironing board in the hotel room or a room service menu will also have a decisive impact on their satisfaction level. We can also add the fact that a large number of business guests don't book their stay themselves, meaning that there could be a discrepancy between their expectations and what is actually offered. In contrast, families and couples are already in a relaxed state of mind, which could mean their expectations are lower or, at least, that the needs they express are fewer. They are more likely to be sensitive to factors such as price, and are certainly more likely to share their experience with their friends and family, and therefore more inclined to recommend an establishment.

All of these figures give us valuable information which helps us to better understand the reality of review portals and their evolution. But what do guests think about this? They are at the heart of all this content that is available online. The question we therefore wanted to ask was: which portal do you consider most reliable when looking for a hotel?



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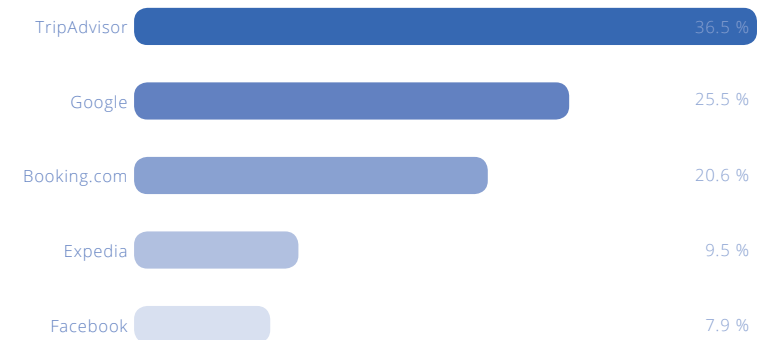
Which portal do guests prefer to use when looking for a hotel?

UNITED KINGDOM
FRANCE
GERMANY
ITALY
SPAIN

If the trends that emerge from our study are relatively indicative, what can be said for guests' feelings? It's important to acknowledge that it can sometimes seem difficult to find your way around the multitude of information available on all the different sites. As a hotel owner, which portal would you be most likely to use when planning a holiday? Which platform do you have most confidence in? This time, we wanted to find out what guests thought. After all, guests are at the heart of what we do at Customer Alliance!

Let's take a look at how French, British, German, Italian and Spanish travellers behave when using these portals. This data will certainly help hotel owners to adapt their guest relations and their online visibility.

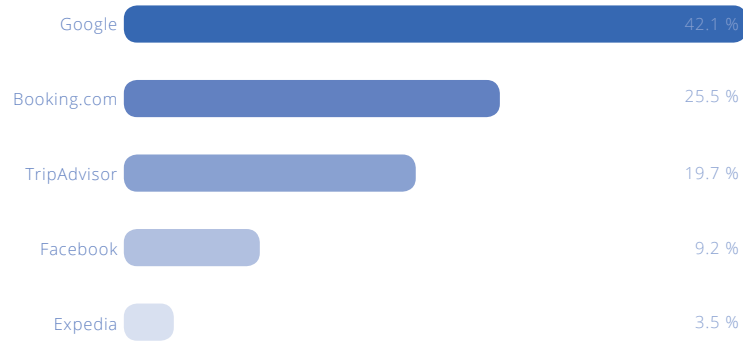
UNITED KINGDOM



For our first sample, we asked a British audience.

Here, it appears that the slowdown experienced by Booking.com on the different markets also materialises in guests' feelings in terms of their consumption habits. Coming in third place out of the portals, it is over 15 points behind TripAdvisor, which dominates its rivals comfortably. TripAdvisor's position at the top is somewhat surprising considering the fake restaurant scandal we mentioned earlier. Google, with its score of 25.5%, is surely going to continue to win users' trust and cement its place more firmly in the guest journey.

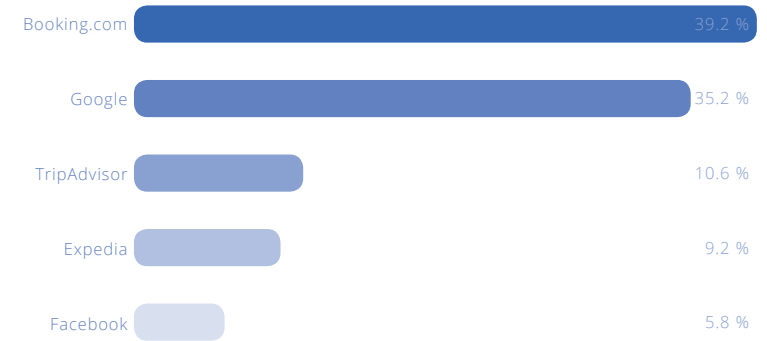
FRANCE



We see a reversal of the situation in France! Google has won French travellers' trust entirely. 42% state that they rely mainly on Google when looking for a hotel. This inevitably reminds us of the search engine's remarkable rise over the past few months, to the point where it has become a multi-faceted tool. Remember, it grew by over 40% between June and December 2018. It's also interesting to consider the huge difference in attitude towards TripAdvisor from one side of the Channel to the other. TripAdvisor came third for French travellers, receiving a score of just under 20%, meaning it still acts as a point of reference. Booking.com remains in very high esteem in France, while Facebook appears to be struggling.

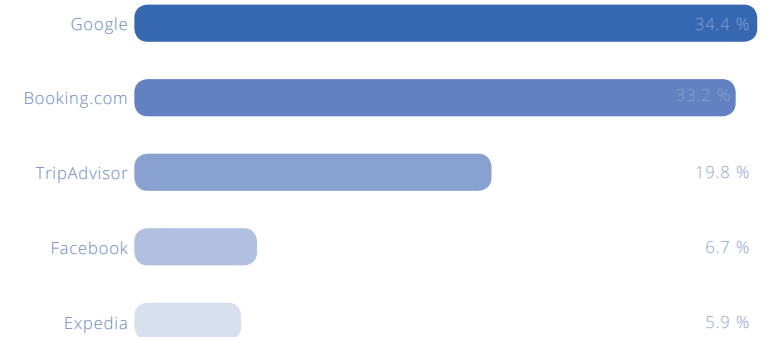
GERMANY

Here, the results are different yet again! Although the top three is the same, the power relationship is totally different. The most telling points are TripAdvisor's low score, with just 10.6% of those surveyed trusting this portal most, and Booking.com's score of 39.2%. In any case, this tells us a lot about Germans' consumption habits when looking for a hotel. Do they go so far as to make a booking on this OTA, or do they simply read the reviews to reassure themselves? It would be necessary



to conduct another study on the subject to obtain more precise conclusions. Google, meanwhile, confirms its good overall form. Facebook is feeling negative effects, more so than in France and in the UK. Will the new format for recommendations change things? It remains to be seen...

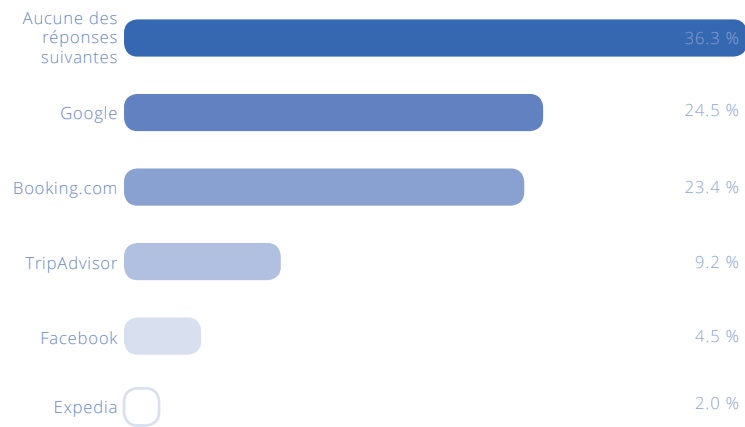
ITALY



Here, the data is more or less similar to that for France: Google is in first place, with Booking.com right on its heels and TripAdvisor in third position. We haven't yet mentioned Expedia, but its results also need to

be qualified. Indeed, this portal is often seen by travellers, and rightly so, as a site that combines all the different players in tourism (hotels, flights, car hire...), hence its less significant impact. In the developments from 2018, we saw that Booking.com and TripAdvisor both experienced a decline in influence, so time will tell whether this will be confirmed in travellers' opinion about the platforms.

SPAIN



Lastly, we come to Spain. There is a small particularity to note here: over 36% of those surveyed were not able to give a concrete opinion regarding their preferred review platform. We can therefore assume that Spanish travellers use several sites and do not really rank them. Despite this, the trend for our three leaders follows that seen in the other countries studied. We notice, however, the small share recorded by TripAdvisor despite its exceptional evolution between June and December 2018 (50% more reviews generated). It's likely that the repercussions of this will be seen in the near future.



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A few words to conclude

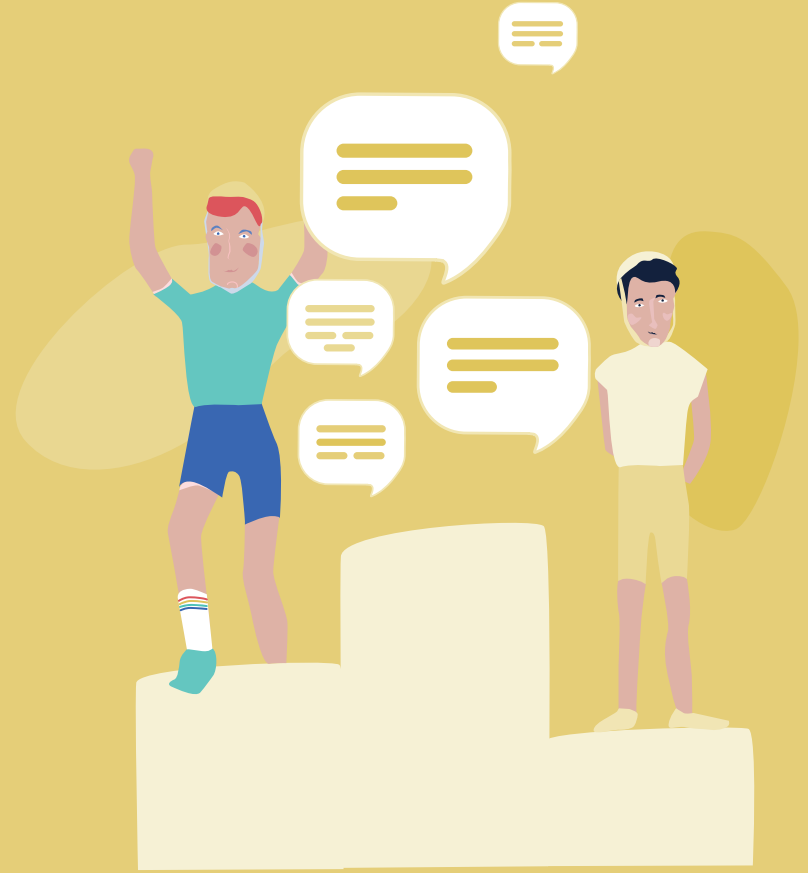
Review portals, OTAs, reviews integrated into websites, NPS... This can all be somewhat tricky to navigate. And with so many different players and opportunities, it's vital to stay up-to-date with the rapid development of innovations.

Of course, the study we've presented does not seek to give you clear directions about what you should do. So what is its purpose? Every hotel differs in terms of its location, standing and guest base. As a result, some platforms might be more relevant and useful for some hotels than others. Nevertheless, it's important to highlight Google's exceptional performance, which leads us to think that every hotel can use it to its advantage, regardless of the nature of the establishment.

Without doubt, guest reviews are important, and this is true for all the platforms. This will continue to be the case in 2019, and this is why it is vital to manage them in an intelligent and effective way. Reviews are more than just guest feedback; they play a role at every step of the guest journey. They act as a source of inspiration and influence during the research phase undertaken by the guest, which ultimately translates into a booking. Reviews can also be useful during the stay, if you take the initiative to invite your guests to share their opinion with the aim of being able to better meet their needs and optimise their satisfaction. Anticipating problems and being attentive are two vital links in the chain of good guest relations. Finally, publishing post-stay reviews allows you to capitalise on better online visibility, but not only that. Indeed, you should always consider guest feedback as a priceless source of information to help you improve your services and operations.

Managing feedback effectively at every stage holds the key to a successful guest experience. Why not start taking advantage of all these resources to increase your guests' satisfaction levels? Customer Alliance, already a leader in online reputation management, particularly post-stay, has just complemented its expertise by offering a solution which allows you to optimise the guest experience. How does this work? It's all thanks to the fact that you can communicate with your guests in a personalised way at every stage of their stay. Saving time, anticipating

problems, making additional sales of your various offerings, improving operations and overall satisfaction... These are all factors that your establishment owes it to itself to control.
Don't delay - contact us now to discuss how we can help you bring together these crucial themes.





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