



Business Recovery in the Tourism Sector

Call to Action



RESPONSIBLE
TOURISM
INSTITUTE

April, 2020

WHAT DOESN'T KILL YOU MAKES YOU STRONGER

Friedrich Nietzsche

We live in times of insecurity, uncertainty and anxiety, these are our certainties.

We do not control all the variables, quite the contrary, but we cannot let uncertainty prevent us from acting.

The time to adapt is now, now!

Biosphere has built this guide, which is a proposal for concrete action, to help entrepreneurs and managers to redefine their tourism business, rethink strategies, create new opportunities, roll up their sleeves and open new channels of working together and partnerships with those who are closest. We are together in this tide of trouble, and it is together that we must overcome it.

The guide is a dynamic document, which we will try to update day by day, at the pace of the changes that we are ALL experiencing. It aims to answer questions that we all ask ourselves:

how can I survive the crisis, where should I start, with whom can I ally myself...

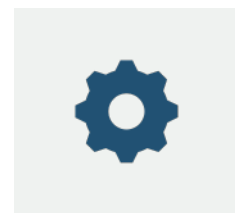
The proposals for action are aimed at all tourism enterprises and do not think that because you have a micro/nano enterprise these proposals do not apply to you, quite the contrary. We present proposals directed to the area of Global Management, Marketing and Communication and People Management.

Read, reflect, adapt, transform. Get ready to (re)act! Not having started yesterday, move on NOW!

Biosphere Responsible Tourism



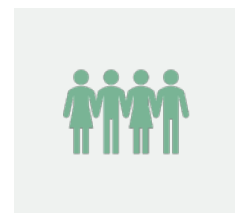
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GLOBAL MANAGEMENT



MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION





What
should we
do?



GLOBAL MANAGEMENT

Prepare for the worst,
expect the best.



GLOBAL MANAGEMENT



MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION

ACTIONS

REACTIVATE INSTITUTIONAL CHANNELS

Keep the institutional channels alive: Municipalities, Regional Tourism Entities, National Tourism... Keep informed of measures for the sector from your regional and national site

CREATE STRATEGIC PLANNING MAP

Draw up a strategic planning, revenue management and cost control map, foreseeing 3 scenarios:

- Fast recovery (2-3 months)
- Medium-term recovery (3-6 months)
- Slow recovery (over 6 months)

Adjust the forecast according to each of these demand scenarios and see how this affects your cash flow.

ADJUST HYGIENE / SANITARY PLAN

Draw up and implement a health plan: communicate that "Let's clean more often" is no good! It will take a constant cycle of deep cleaning, plus dedicated spaces with hand disinfectant and soap (A)*; effectively record cleaning times so that nothing is forgotten and can be communicated, as well as a checklist that includes in detail all the steps of the procedure used (B)*.

* PHOTOGRAPHIC RECORDS OF THE TEAM IN PREPARATION

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GLOBAL MANAGEMENT



MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION

ACTIONS

CONTROL PRICE - AVOID REDUCTIONS

Avoid price reductions!

In return offer spa, breakfast, tickets to local events, free parking, welcome drink, courtesy tours, etc.*

*MEDIATING THE ANALYSIS OF DEMAND RESPONSE - PRIORITIZE REGULAR/REPEATING CUSTOMER IN A 1ST PHASE

ENHANCE EXPERIENCE

Use the lower occupancy levels to offer guests returning a better experience, without taking advantage of their position: propose upgrades!

MOBILIZE HH.RR

Mobilize human resources according to needs: possibility of simplified lay off, vacation, time bank.

MANAGE SUPPLIERS

Relationship management with suppliers (mainly local), service providers and customers. In the case of suppliers, assess whether they need to renegotiate payments and prioritize, taking into account the impact of the crisis on each one.

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GLOBAL MANAGEMENT

ACTIONS

CREATE CRISIS MANAGEMENT MANUAL

Create a crisis management manual, taking care that this context can be repeated soon..., and other scenarios, such as natural disasters, should also be considered.

EVALUATE STOCKS AND PPE'S

Ensure you have all materials and PPE's: gloves, mask, disinfectant gel, disinfection cleansers and other chemicals.

NEGOTIATE

Negotiate with traders new margins, based on possible failures/scenarios.

ACTIVATE DOMESTIC MARKET

When confidence returns, the domestic market will react faster than anyone else: people will not feel comfortable travelling abroad so soon.

REVIVE THE MARKET

The market in your vicinity will have great potential, do not miss it

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MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION





GLOBAL MANAGEMENT



MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION

ACTIONS

MANAGE DISTRIBUTORS

To strengthen the relationship with distribution, it is necessary to use all the capacity of distributors to bring customers (evaluate new partners).

UPDATE INFORMATION

Update information on OTA's, more proactive approach in terms of cleaning and sanitization, besides adding new packages and offers.

INTEGRATE NEW LOCAL PARTNERS

Identify potential new local partners to strengthen experiences and programs.
Make sure you consider solutions outside the box and offer them some training on your operation, sustainability procedures (and don't forget to communicate it).

CREATE NEW SERVICES

Integrate the possibility of requesting a doctor on demand, for companies further away from hospital centers (+20mn). Establish partnership with local doctor.

REVISE EXPIRATION DATES

Reviewing product validations, especially perishables.

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Marketing and Communications

Don't give up, reformulate!

What
should we
do?



GLOBAL MANAGEMENT

ACTIONS

MAKE NO CUTS

Resist immediate temptation! Do not cut back on what will prove essential. Marketing, in times of crisis, is what can keep your company at the forefront of positive communication. Do not cut marketing and communication, change or consolidate your focus on sustainability: nature, hygiene and health, especially in companies located in urban or rural areas, where the massification of tourism is not yet a reality.

INVEST IN PAID RESEARCH

Invest more in meta-search: when customers start looking for solutions it is because they already intend to book. Therefore, you should invest more in research and meta-search to capture as many clients as possible and take them to the company's website. (SEE META-SEARCH GUIDE IN ACCOMODATION_PDF)

To stay on top of mind - especially when customers start thinking about travelling again - keep investing in paid research and meta-search, to ensure that it continues to appear to those who are still thinking about travelling or will think soon (we all need to escape this scenario soon). And no, this proposal is not for big business!!!!

MEASURE WHAT CAN IMPROVE

Conduct a Marketing 'Audit' to review the style of your brand, website and sales activation materials (do they effectively communicate the value proposition of your offer and benefits?).

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MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION





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ACTIONS

BE TRANSPARENT

Use the website and social networks to pass on transparent information (e.g. message to our clients/guests); do not hide the virus situation and the crisis, integrate it.

PROVIDE MORE AND BETTER INFORMATION

Inform about ongoing hygiene and safety procedures: cleaning of spaces, ventilation (e.g.: "As long as the current crisis continues, we assure our customers that their safety and that of our team remains our top priority. Therefore, we are strictly following all the guidelines of our authorities, we follow the strict health and safety guidelines and adopt the highest level of preventive measures to keep everyone safe - pictures of the measures - we will soon offer you all wonderful experiences again!").

INVEST IN INTERNAL COMMUNICATION

Place your commitment to cleanliness at the front and center of communication: signs in the service areas and common areas, sharing of safety procedures, information in the toilets to encourage hand washing (e.g. "let's all wash our hands!" can be an unforgettable way to remind everyone that hand washing is the best way to prevent infection and don't hesitate to inform them that you have adhered to globally accepted guidelines such as "our unit/company follows the WHO guidelines for adequate and complete hygiene").

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MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION





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ACTIONS

BRING THE NATURE

Be in contact with nature: let in the air, sun, etc.

FAVOUR LOCAL SUPPLIERS

Communicate preference for local suppliers.

STRENGTHEN TESTIMONIES

Collect testimonies of the clients' experiences and share them for a fresh start: "My memories of that experience were..."

IDENTIFY MARKET SEGMENTS

Identify the market segments most likely to make reservations, such as young people, families and young couples within a short drive distance.

ATTRACT INFLUENTS

When the outbreak is under control, influencer marketing can be a great way to show that your company is safe: list the most appropriate bloggers and influencers.

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ACTIONS

BRAND REINFORCEMENT

Reinforce brand value and solidify sustainability practices/values with credibility (show only what is done or what is planned). Add to your brand the values of others: e.g.: Make your certifications, awards and distinctions more public, as long as they are up to date!

LEADS CONVERSION

To capture more sales among the demand that may exist, you can focus on converting leads into potential customers who have already visited your site (redirecting is an effective way to achieve this by redirecting campaigns to customers who have already been on the company's site):

SEE INTERESTING WEBINARS ON THE SUBJECT AT [HTTPS://TRIPTease.COM/BLOG/RETARGETING-WEBINAR-SERIES/?UTM_SOURCE=TRIPTease&UTM_MEDIUM=BLOGLINKINTERNAL TRIPTease&UTM_CAMPAIGN=WW_AL L BLOG](https://triptease.com/blog/retargeting-webinar-series/?utm_source=triptease&utm_medium=bloglinkinternal%20triptease&utm_campaign=ww_al_l_blog)

REFUND

Ensure reimbursement for those who call to cancel.

ADD

Communicate that you do not cancel, but postpone, in the long term (2021), possibly with small upgrades or extra benefits.

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ACTIONS

REVISE WEBSITE

Ensure that messages on the site are targeted to domestic customers or Iberian visitors. To reinforce in the messages the advantages of direct booking (Ex of good messages in the site: <https://help.triptease.com/en/articles/1783991-messaging-tips-and-best-practices>).

CHOOSE EMAIL MARKETING

Deliver e-mails to everyone based on 3 components:

- (A) Empathy: the introduction should be very clear, this is a difficult time for everyone and security is the priority. You should avoid being 'autistic' about the tragic and stressful aspects of this global pandemic! Be human and real, rather than distant and corporate;
- (B) Update: share your hygiene measures and what you are doing to fight the virus and to keep staff and guests safe;
- (C) Remember: let us know when your company will be up and running and we will be happy to accept guests. Do not include a discount. Close the email with some positive sentences, which highlight your values proposal, the values of the company and what it represents.

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MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION





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ADMINISTRATION

ACTIONS

STRENGHTEN PERSONALIZED EMAILS

Send a specific and personalized e-mail for the next reservations: when you start to have reservations, confirm with a personalized e-mail, informing of the hygiene and health conditions, cancellation options, the benefits of being there...; for those who have cancelled, it is important to resume this relationship, inform them that you are sorry for having been cancelled, but they will be welcome at any time, if they wish to re-book.

CUSTOMER LOYALTY

Strengthen or reactivate loyalty programs: reduce criteria for 'points'; offer double points for the next few months; resurrect inactive customers; remind customers who have expired points that they can take advantage of them, with upgrades.
Renew contact with former customers by sending an email, postcard, sample, souvenir with the company's identity (they keep a positive souvenir of the company) and invite to share.

PROMOTE LOCAL PARTNERSHIPS

Taking the opportunity to publicize your local partnerships, your commitment to the rapid resolution of the crisis and your support for others, is an excellent opportunity to share non-promotional content on social networks.

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What
should we
do?



PERSONNEL ADMINISTRATION

“Your main clients are your employees.
Look after and for them, and then for
your customers.”

Ian Hutchinson



GLOBAL MANAGEMENT



MARKETING AND COMMUNICATIONS



PERSONNEL ADMINISTRATION

ACTIONS

STAY IN CONTACT WITH STAFF

If employees are at home, call daily to find out how they are and if possible, develop activities online and together: e.g. having coffee at the same time, gaming, challenges for Whatsapp and other activities.

RECORD AND REPORT

Maintain effective communications with employees on pandemic-related questions/issues.

STRIVE FOR TRANSPARENCY

Explain to employees the impact of the crisis and ask for full collaboration and flexibility: be transparent and open about the situation and its impact on the business.

PROTECT THE EMPLOYEES

Ensure the well-being of employees by instituting appropriate control and health measures.

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GLOBAL
MANAGEMENT



MARKETING AND
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PERSONNEL
ADMINISTRATION

ACTIONS

EMPATHISE

Empathy with our people is powerful, it is a good opportunity to train/train the teams - everyone should be properly informed about the latest messages, policies and processes. The last thing you want is for employees to have different messages from yours. This creates confusion and a future of poor customer service. Keep a unified and consistent message.

LISTEN

Opportunity to collect suggestions for team improvement or review internal procedures (which are never done due to lack of time).

MAKE A POSITIVE COMEBACK

When returning to work, make sure employees are in good health and maintain a positive spirit, essential to provide a positive customer experience.

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REMEMBER...

When you hit rock bottom, it means the only way is back up.

It's essential to be alert, ready to act.

Do now what you had no time to do before.

Don't leave it till tomorrow!

Keep an holistic approach to your values and link this to strategies for sustainability and social wellbeing. It will pay off!

Don't deceive yourself, it won't be easy! We won't go back to the life we knew, but we can get better and stronger to a new life!

Don't give up! Be perseverant and take every small chance!

See you later...

This document is written in collaboration with Biosphere Portugal.

ANALYZE

ADAPT

MAKE IT HAPPEN!



**#TOGETHER
WE ARE
STRONGER!**

*Responsible Tourism Institute would like to thank you Biopshere Portugal for
this guide*

Is your metasearch strategy costing you direct bookings?

In this survival guide, discover best practices and optimize your bidding strategy to make metasearch your hotel's most profitable distribution channel.

FIRST EDITION

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Dear hotelier,

It's been a watershed year for the hospitality industry, with much of the change attributable to the impact of metasearch. Now more than ever, hoteliers have an advantage when it comes to gaining guests on their direct channel. Hotels now have new tools to tackle rate leakage through wholesalers, and OTAs have had to scramble to change their approach to digital marketing in the face of fresh competition on metasearch. Even the world's biggest technology companies have been doubling down on the channel, with the likes of Google seeing it as a crucial part of their travel strategy in the long term future.

So despite all this, **why do so many hotels have such a poor meta strategy?**

Metasearch provides hotels with the opportunity to drive OTA volumes at half the price, but this can only be done with an agile approach that works across the whole sales funnel. A 'set it and forget it' mentality is no longer an option. Hotels looking to target their ideal guests and drive conversions on metasearch need to leverage data from their direct channel and proactively make smarter decisions on the best times to bid. OTAs have the power, resources and budget

to do well at meta - but only hotels truly know their own guests, and it's this knowledge that gives them the edge.

With the industry rapidly moving forward (and Google placing even greater emphasis on the channel as part of their ongoing evolution into a one-stop shop for travel), metasearch is no longer just a good opportunity for hotels to supplement their distribution strategy. Metasearch is completely essential for hotels if they are to avoid falling behind and becoming entirely dependent on third parties for distribution.

Many hotels feel that the battle for guests online has never been a fair fight - but for the first time, the unfair advantage now lies with hotels. Over the course of our hotel metasearch handbook, we've outlined the key tips, tricks and learnings that can help hoteliers get a step ahead of the competition, and how acquisition and conversion can work smarter together to empower your hotel's direct conversion rate.

Will you capture the opportunity that meta provides?



What is hotel metasearch?

Metasearch sites aggregate search results for keywords and phrases from different search engines. In online travel specifically, metasearch sites aggregate results and prices for flight and hotel searches. In a price-conscious market, the instant availability and pricing information provided by metasearch engines make them an easy-to-use and dependable solution for travellers around the globe.

The growth of hotel metasearch shows no signs of slowing, either in its fast-paced technical development or through its increasing popularity among travellers in their pre-booking journey. 72.5% of consumers surveyed by EyeForTravel in 2018 said that they used metasearch sites regularly in their pre-booking journey. First introduced in the early 2000s, some of today's best-known hotel metasearch sites include Google and TripAdvisor.

The differentiating benefits that hotel metasearch sites can offer to travellers, compared to OTAs or

hotel websites, are:

- A variety of accommodation choices in their chosen area that have availability on their selected travel dates;
- Social proof in the form of ratings, pictures and reviews for each property;
- The feeling of security and value that comes with having found 'the best price'.

For hotels, metasearch is increasingly an opportunity to acquire greater numbers of guests without being dependent on other distribution channels. It is a chance to go toe-to-toe with OTAs for your ideal customers.

Many hotels feel that metasearch is an area in which they cannot win - a belief driven by a historically high barrier of entry, one which has required heavy investment, scale and technical knowledge. Thankfully, acquiring guests on metasearch is more achievable now than ever - but it's up to you to make sure it's your direct site they choose to complete their booking with.

Even though you may not be actively participating in metasearch yet, your partner OTAs are doing so on your behalf. The commission you pay is allowing them to bid uncontested for guests that you should be converting yourself. And we know the value of customers who choose to book direct: you can capture their data, establish a direct relationship, upsell and drive loyalty.

In a nutshell, bringing guests from metasearch through to your booking engine (and converting them once they're there) can drive more revenue for your hotel. However, failing to do so can result in higher costs and less profit.

Even for hotels bought into the benefits of metasearch, developing a bidding strategy that can compete with OTAs is a huge challenge. That's why we're bringing you an in-depth metasearch report that covers all you need to know to succeed in today's rapidly-changing distribution landscape.

Metasearch: the key platforms

Metasearch is now comfortably dominating traditional ads in terms of investment, but is there still room for growth in a saturated global market?

Metasearch is now more than just the latest digital marketing trend, but the predominant tool for hotels to advertise their rooms online. According to recent research conducted by Mirai, the level of investment in metasearch has eclipsed that of regular advertisements every year since 2017.

Despite the channel's impressive growth, the competitive landscape is looking particularly one-sided in certain regions. Google is currently the beneficiary of 67% of all metasearch investment - the nearest challenger is Trivago, with only 17%. Although Google is currently dominating the channel, are other players making their own mark on metasearch?

While Google's ubiquity in the US accounts for 71% of metasearch clicks in the region (Fornova),

it's an entirely different story in China. Local platforms such as Mafengwo dominate, alongside disruptive options within popular communication and transport apps like WeChat and Grab.

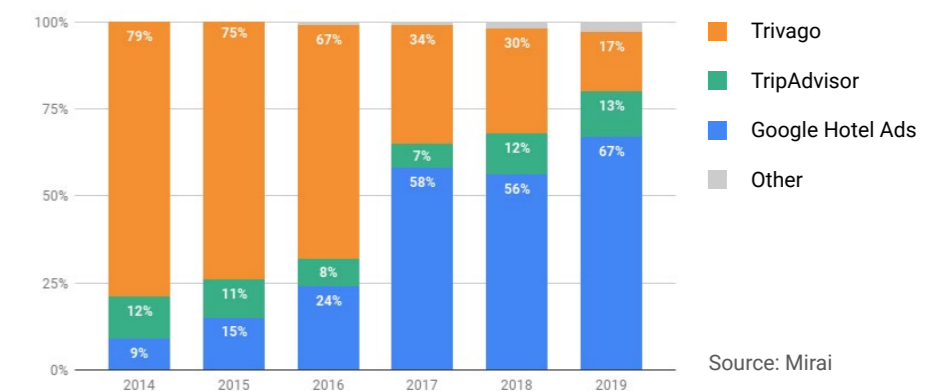
HotelsCombined, recently acquired by Booking Holdings, also has its own claim to the meta crown. With the highest average number of bidders on each search in 2018 (Fornova), this meta site is statistically the most competitive in the industry.

Trivago is the only metasearch engine that has sworn off ever implementing a "book on trivago" option, and allows advertisers to take complete control at the buying stage. This strategy

offers advertisers a strong brand presence on the most important part of the buyer's journey.

TripAdvisor cannot be ruled out, as it is still the largest travel website in the world. However, its revenue had a rollercoaster ride in the past year, with website traffic declining and revenue from hotels dropping by 4% in Q2 2018 (FT).

Will Google's dominance remain unchallenged, or will new players continue to shake up the meta landscape? One thing's for sure - in a growing marketplace that's bursting at the seams with innovation, now is the best time for hotels to take advantage of metasearch.





How Google is changing metasearch

After much anticipation, Google has finally revealed its future plans to shape the behaviour of travel bookers. With Google's Travel arm a central part of its global growth, is the tech giant about to challenge OTA dominance?

Google's metasearch approach has been driven in part by its desire to open up auctions to smaller hotel chains and independents, giving them more opportunity to bid on their website's visibility and rates. As long as a hotel is bidding in Google Hotel Ads auctions, they can appear on generic and brand searches alongside even the biggest OTAs equipped with the most commanding marketing budgets. With the right methodology and data, Google's metasearch platform provides a huge opportunity for hoteliers.

Since first introducing Google Hotel Ads in its earliest form in 2010, Google has been continuously working on improving the experience for both guests and hotels. This culminated in the integration of Google Hotel Ads with Google Ads in July 2018, and although the migration has yet to be fully completed, it's promising to provide advertisers with greater flexibility with their metasearch campaigns. Some of the biggest changes include:

- Faster reporting functionality, with daily (sometimes hourly) performance statistics allowing hoteliers to keep a close watch on the impact of their campaigns.
- More precise segmentation of bids and bid multipliers, which now depend on specific campaigns and audiences.

- Better budgeting options, which can be adjusted at campaign level rather than drawing from daily spend caps.

In May 2019, the search engine giant integrated meta into Google Travel, a comprehensive portal of flights, hotels and travel for guests looking to book their next vacation. With the likes of Mark Okerstrom, the CEO of Expedia Group, claiming that "Google is [our] chief competitor", the OTAs are concerned - but do hotels need to be concerned too? Once they begin to dominate the market, Google's relentless pursuit of a seamless user experience could become both a blessing and a curse for hotels. Focusing on your direct channel and optimizing all meta platforms available are the best ways for hotels to withstand future challenges.

The impact of brand on metasearch

When it comes to allocating marketing budgets, brand often gets overlooked. "The industry's attitude towards brand has been 'if I don't see a clear return on it, I'm not going to invest in it', says Joe Pettigrew, Director of Revenue Maximisation Europe Hotels at Starwood Capital Group. The truth is that every aspect of a brand, from visual identity to reputation, can affect direct booking strategy in the long run. It is also advantageous when competing for bookings in the metasearch space.

For years, OTAs and big hotel chains have been investing in their brands. Today, they can leverage their established reputations on metasearch to capture users at the decision stage, as they expect travellers to show preference for their brand over others. To compete, hotels need to think about optimizing the brand experience not only on their website, but also on various distribution channels, including metasearch.

The ability to curate images, messaging and conversation with your audience can give hoteliers greater control over their brand's appearance on meta. TripAdvisor allows hotels to add hundreds of

images, and hotels can customize their appearance on Google Travel by curating their Google My Business listing with photos, descriptions and links to the direct site. Not advertising the uniqueness of your property is a missed opportunity, especially on a metasearch website where your hotel competes with many other businesses.

Meta should be seen not only as a tool to showcase your property, but also an opportunity to develop direct relationships with potential guests. To build trust, it is crucial to show the best price online and ensure that your booking engine is secure. A failure to do either could result in larger dependency on OTAs than you started with - without trust, your guests won't feel secure enough to book direct. Further damage to your brand reputation can lead to losing potential customers not only to OTAs, but also to other hotels in your area. And vice versa - a strong brand affinity can make travellers skip the research stage altogether and come straight back to you.

"Customers go to OTAs and hotel metasearch sites during the research stage - that is, if they don't know which hotel they want to stay in. If your customers have a strong affinity with your brand, they will search for your hotel in their destination."

Joe Pettigrew
Director of Revenue Maximisation,
Europe Hotels
Starwood Capital Group

Choosing the best approach to metasearch

Metasearch auctions can be understandably confusing places for hoteliers new to the platform. We’ve laid out some of the most typical auction scenarios in the diagram below, showcasing the effect of varying levels of hotel participation.

The two main factors that influence

decision-making at this stage of the customer’s journey are:

1. **The order in which these listings appear.** Listings that are higher on the list are more likely to be seen and selected. An advertiser’s position in the listings is determined by the real-time auction happening

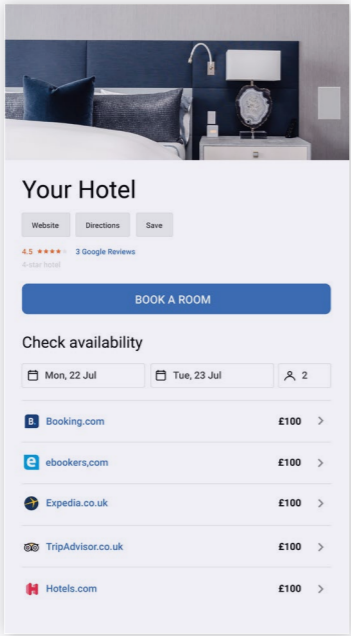
behind the scenes. In general, the participant with the highest bid will come out on top.

2. **The cheapest price.** On meta, finding the cheapest price is as easy as scrolling down the list of merchants and selecting the best price available.

In theory, to increase the likelihood of a direct booking on metasearch, hotels have to ensure they’re offering the best price direct and bid more than their competitors. However, this strategy can be wasteful and time-consuming. You don’t have the luxury of an OTA’s

budget and resources to ensure you come out on top of every meta auction. You also might be sacrificing ROAS (return-on-ad-spend) by over-spending on low-value customers. To drive the most revenue from this channel, you need to bid intelligently on your ideal customer profile.

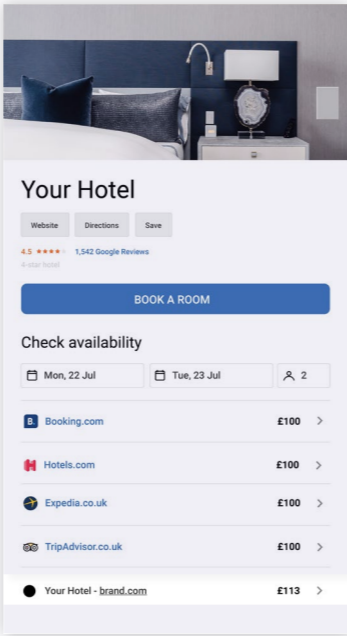
Passive approach (no participation):



Hotels that choose not to participate in metasearch in any capacity will not have their price, brand or direct booking engine link appear in the auction underneath their listing. These hotels subsidize the OTAs that list on their behalf, and send an unconscious message to meta bookers that it is best to book on a third-party site. Without the chance to convert meta bookers directly, these hotels lose out on the ability to develop pre-stay relationships with their guests.

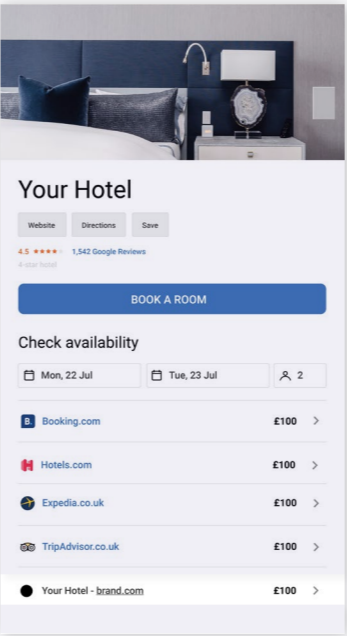
In-house management:

WHEN UNDERCUT



Achieving success on meta with in-house management is difficult but not impossible with data scale and sophisticated resource. However, there is a limit to the bidding sophistication that can be achieved without significant development, which is a challenge for many hotels. There’s also the fact that any kind of bidding model only has the hotel’s own data to work from, so can’t react to global or regional trends; alongside this, real-time parity management on

WHEN IN PARITY

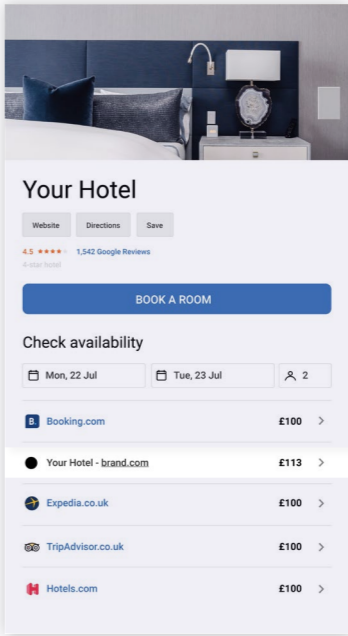


meta is nearly impossible without a system that connects both on-site and off-site data.

Not having a generous budget or not knowing how to bid effectively can result in below-the-fold places in the auction like on the examples above.

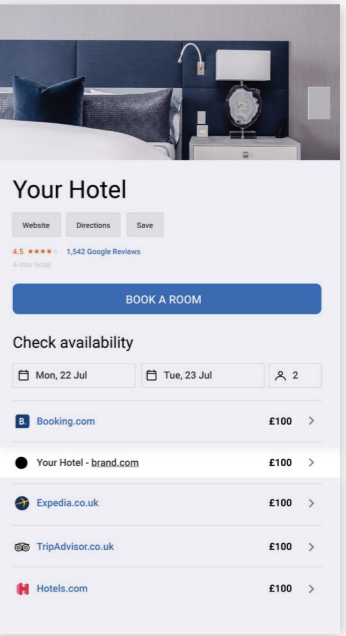
Traditional agency:

WHEN UNDERCUT



The benefits of using an agency to manage your metasearch performance include the reduction in effort required from your team and an increase in the specified knowledge required for meta bidding success. However, agencies often update bids on a fortnightly or even monthly basis; with OTAs changing their bids in real time, this makes it harder to compete. And again, agencies for the most part can't

WHEN IN PARITY



take your parity into account when bidding for guests - leaving you open to advertising that you don't have the best rate.

The Guest Acquisition Index

To make metasearch a revenue-driving digital channel, hotels should be focused on the number of direct bookings they acquire at a lower cost than they would pay via an OTA. The idea is simple: the more efficient your hotel is at metasearch, the more guests you can acquire with the same budget!

If you have a budget to exceed that of the OTAs, you could win every auction on metasearch simply by bidding high. If not, you have to think strategically about the investment you’re making in every bid. Finding the balance between driving enough traffic to get bookings but keeping the average cost per booking down is tricky, and most hotels don’t have access

to the big data required to make intelligent bidding decisions.

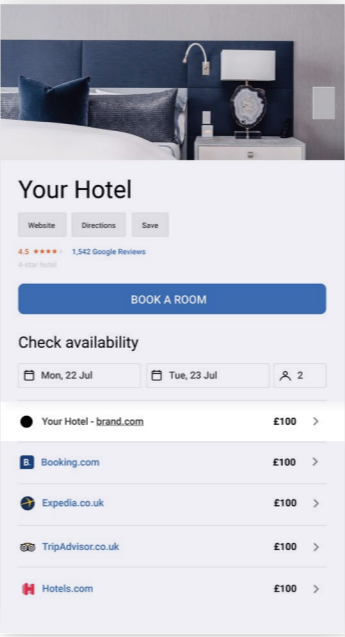
Most hotels and traditional agencies are using the same limited Google data to make their bidding decisions. At Triptease, we are able to aggregate onsite behavior data from thousands of hotels worldwide together with information on each hotel’s ideal guest profile and highly-specific data from each individual search, meaning we know more about a guest’s potential value than anyone else in the auction. We can predict how likely a searcher is to make a booking, and reduce the risk of a hotel wasting its metasearch budget when bids are high.

PROS

- Triptease’s **connected data** means bids can be updated real-time to reflect a searcher’s value to the hotel. The Guest Value Index and Trip Value Index use a combination of data from across tens of thousands of hotels and information specific to your business to determine the searcher’s initial valuation based on profile fit and trip information
- Triptease **monitors your disparities**, so we know when you’re undercut on meta. We can remove you from the auction when you don’t have the best price - meaning you don’t waste spend on guests likely to complete their booking on an OTA.
- **Triptease Meta** is a system that constantly learns and refines itself using machine learning.

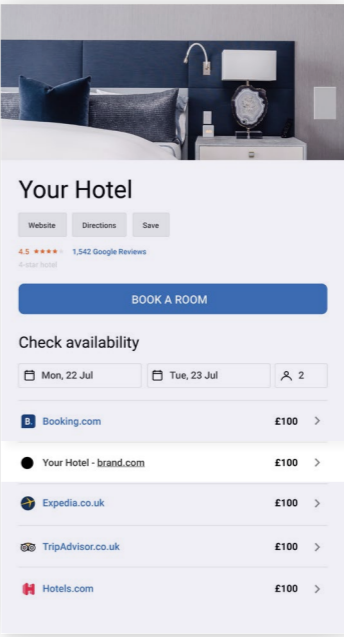
PARITY
+ IDEAL GUEST PROFILE

Triptease’s Guest Value Index and Trip Value Index analyze your guest’s potential value to your business and their readiness to book. When the guest value is high (for instance, they’ve searched on your direct site in the past), we will invest more dollars into this valuable bid.



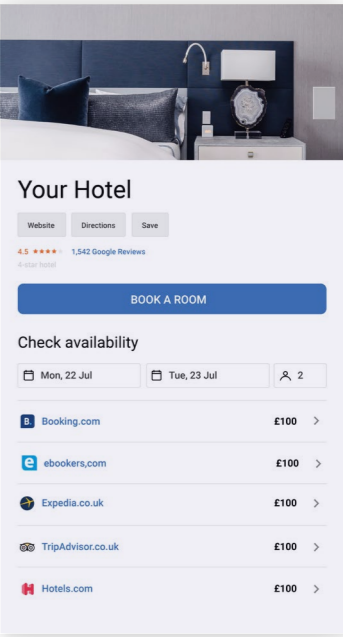
PARITY
+ NOT IDEAL GUEST PROFILE

We invest less money into this bid so that you can have more budget for customers that match your ideal guest profile and have a greater purchase intent.



DISPARITY

We don’t invest your money into bids when you’re undercut, because it could be wasteful for your budget and can damage your brand. Instead, we report the disparity so you can take action and fix it!



CASE STUDY

Chroma Hospitality

Number of rooms: 1,557
Location: Philippines

With OTAs bidding on Chroma Hospitality’s brand in meta auctions, they were effectively paying twice for traffic that should have been theirs. They wanted to increase their own volume and ROAS while reducing OTA costs.

Triptease Metasearch adjusts the bid for every guest depending on demographic and behavioural data, room availability, parity and PMS data.

The full **Triptease Platform** attracts high value guests to your website then deliver them a completely personalized experience that’s designed to convert.

16X

ROAS in one month with the full Triptease Platform.

44%

Increase in conversion rate one month since integrating with the full Triptease Platform.

\$75k

Revenue generated in one month from Triptease Metasearch.

“Attract and convert together means more revenue at less cost! With Triptease, we continue to achieve better ARR (average room rate) and even more conversions on our hotel websites.”



Sunish Sadasivan
VP E-Commerce & Revenue Management
Chroma Hospitality



The four pillars of meta success

With 43.6% of customers stating that they'd use price comparison websites 'every time' they make a booking, it's clear that metasearch has already become a must for your potential customers during their travel planning journey (Fornova). Metasearch can become your hotel's leading channel for acquiring

direct bookers online, although just being present in the auctions is no longer enough. Improper use of the channel will not only impact your marketing budget, but also damage your hotel's brand reputation. Find out the vital steps you can take to stay competitive on metasearch sites in 2019.

AUCTIONS

Invest in the channel that is right for your hotel, and make sure that you are bidding the right amount for the right people at the right time. Not only does this result in significantly more direct bookings, but it is a smarter way to optimise your metasearch budget. Combine your own data and the metrics that metasearch engines provide to intelligently and dynamically adjust your rate strategy.

BRAND

Fine-tune your brand presence on meta sites. Brand consistency is crucial: keep your visuals and the tone of voice the same across all digital touchpoints to strengthen your brand equity. After bidding for your ideal customer who you know has significant intent to stay at your hotel, a secure and seamless experience is the final step to get them to convert.

PARITY

Ensure that you always offer the best rate direct, and are not being undercut by third parties. Price is the deciding factor for prospective guests on meta - if your hotel is more expensive, you'll still be paying for guests who just want to browse your direct site and then go to book with an OTA. Make sure the price displayed on metasearch is also accurate, or the provider could penalize your hotel.

SOCIAL PROOF

Don't invest heavily in meta if your hotel doesn't have the credentials to back it up. Focus on fixing your hotel's issues offline, and make sure that you have enough reviews to shape a truthful impression of your hotel. In the words of Pierre-Charles Grob, CEO of D-EDGE, "If you have a sh*tty hotel, there's no way you're going to do any direct bookings."

Hotel meta in 2020

The next year is set to be the biggest yet for metasearch. Innovative new platforms, growing market competition and radical new approaches to bidding all promise to provide hotels with even more opportunities to attract more guests through their online channel.

IN-APP BOOKINGS

Metasearch on mobile has typically underperformed that of other devices - conversion rates are 2.5x higher on desktop than mobile. However, both existing and emerging metasearch players are betting on mobile and in-app auctions in their future plans.

In China, the likes of WeChat and Grab are dominating when it comes to integrating meta into their popular smartphone applications, and other global metasearch engines are working on increasing the performance and user experience of their mobile websites. There's still a long way to go, but mobile metasearch may become more than just a means of discovery sooner than you think.

"The prominence of meta bids over organic search results will continue to dramatically increase on Google in 2020. Be well represented before it's too late and you're no longer appearing in searches."

Alasdair Snow

Co-founder and Chief Product Officer

Triptease

NEW PLAYERS

While Amazon's first foray into travel didn't end up taking hold, it would be unwise to rule them out as a potential future player in the metasearch landscape. Already one of the most traffic-heavy "buy anything" websites in the US and increasingly popular among users in APAC, it could become crucial for hotels and OTAs looking to target audiences on a global scale.

"I think if Amazon finally makes an entry to travel, it will be in the form of a hybrid of metasearch and an OTA, where different agents and hotels compete for the best rate and inventory on Amazon," says Joe Pettigrew from Starwood Capital Group, "Similar to Book on Google or TripAdvisor's Instant Booking, this is the only way I can see Alexa natively supporting travel bookings in the future."

ABSOLUTE GROWTH

As the market continues to grow, major players will start to heavily invest into their user experience. Taking inspiration from the success of eCommerce giants such as Amazon and Zalando, we can expect even more personalization options for guests looking for the perfect price and hotel to suit their needs.

Metasearch will also continue to be a crucial part of a hotel's distribution strategy. More hoteliers will start to connect their acquisition and conversion methods across the sales funnel, with meta playing a fundamental role in attracting the right guests to their direct channel. In 2020, meta will no longer be an optional tool, but the most important part of a hotel's online marketing plan.

Why do we care?

OTAs are building an enormous data advantage over hotels. When it comes to acquiring and converting your guests, they now know them better than you do.

Triptease is here to change that. We make your data work harder to increase revenue direct.

Our Triptease Platform identifies your most valuable guests then works across the entire customer journey - from acquisition to conversion - to make sure they book directly at your hotel.

We support you the whole way with coaching, content and community. Take back control of your distribution and become an expert at driving direct - intelligently.

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