



HOSPITALITY

THE EXPECTATIONS AND BEHAVIOUR
OF EUROPEAN TRAVELLERS

Press release . March 2017
OpinionWay survey for Foncière des Régions

Foncière des Régions

As a key player in real estate, Foncière des Régions has built its growth and its portfolio on the key and characteristic value of partnership. With a total portfolio valued at €19Bn (€12Bn in group share), located in the high-growth markets of France, Germany and Italy, Foncière des Régions is now the recognised partner of companies and territories which it supports with its two-fold real estate strategy: adding value to existing urban property and designing buildings for the future. Working mainly with Key Accounts (Orange, Suez Environnement, EDF, Dassault Systèmes, Thales, Eiffage, etc.) in the Offices market, Foncière des Régions is also a pioneering and significant operator in two other profitable sectors: the Residential market in Germany and Hotels in Europe.

Foncière des Régions is a premium investor in European hotel real estate and is now the leading development partner for the major Hotel chains (Accor, B&B Hôtels, Meininger, Motel One, Louvre Hotels Group, NH Hotels, Pierre & Vacances). **Foncière des Régions manages assets worth over €4.4Bn with over 45,000 rooms in Europe.**

For more than ten years, Foncière des Régions has supported hotel operators in implementing their development strategy in Europe with the aim of providing an even better customer experience. Hotel operators are seeking a prime location and high quality services in order to provide their customers with a memorable experience!

The results of this study reflect this trend, confirming our position as a long-term partner of hotel chains.

Dominique Ozanne, CEO Hotels, Foncière des Régions

www.en.foncieredesregions.fr

NOTE ON METHODOLOGY

The *Hospitality: the expectations and behaviour of European travellers*, was carried out on three sample cohorts: **1,096 respondents in France, 501 in Germany and 504 in Spain.**

These were representative samples of the over-18 population in each of these countries. They were compiled using quotas for sex, age, socio-economic category, type of home area and region of residence.

Interviews were done by a **self-filled online questionnaire** using the CAWI system (Computer Assisted Web Interview) between 20 and 27 February 2017.

Any publication in part or in full must include the entire following text: "OpinionWay survey for Foncière des Régions" and no excerpt from the survey can be dissociated from this title.

OpinionWay also wishes to recall that the results of this survey must be read in light of the margins of error: **1.9 to 4.5 points** maximum for a sample of 500 respondents and **1.5 to 3 points** maximum for a sample of 1,000.

OpinionWay ran the survey in accordance with ISO 20252 standards and procedures.



Key lessons learnt

- **Hotel stays are still the preferred option for Europeans' holidays and weekends away.** Private home rentals were not the most popular choice. To choose the accommodation that best suits them, travellers above all trust the recommendations of other people, whether past hotel guests or their friends and relations. **Recommendations left by customers on booking sites play a leading role in the choice of accommodation.**
- The choice of hotel seems first and foremost to be determined by its closeness to tourist activities, **and if travellers continue to return to the hotel, it is usually because they appreciate being able to access the services they like and enjoy the consistent quality.** Being able to relax, enjoy good meals and ancillary services (such as spas, sports rooms, etc.), are real advantages for travellers and affect their decisions when choosing accommodation.
- **In general, French, German and Spanish travellers share many things in common when it comes to travel habits. That said, there are some cultural differences:**
 - ∴ French travellers pay particular attention to the comments of other holidaymakers on hotels. More than half (54%) check such comments before choosing their accommodation. This practice, while used as a source of ideas when choosing a trip, is less commonly relied on in Germany and Spain (49% and 37%, respectively). Spaniards, meanwhile, give more weight to the advice of friends and relations (44%).
 - ∴ When it comes to choosing accommodation, French and Germans consider the most important factor to be proximity to tourist activities or sites (58% and 45%), while for Spaniards, the biggest point is the hotel's class and comfort (58%).
 - ∴ During their stay at the hotel, French and Germans particularly like an ample breakfast (68% and 81%), while Spaniards prefer to have access to the swimming pool or spa (58%), an important point for Germans too.



For a successful holiday, Europeans prefer hotels...

- **The leisure accommodation industry has undergone huge changes in recent years, with the development of alternatives to traditional hotels.** However, Europeans say that they still mostly prefer hotels for their holidays and weekend breaks: more than half (55%) of French people book a hotel stay at least once a year. Staying in private homes is also a solution used by French holidaymakers with more than one third (34%) using this option. The dominance of the hotel is also evident in Germany (63% for hotel bookings, compared to 42% for private accommodation) and Spain (65% and 34%, respectively). In a sign that staying in private accommodation is not yet wholly democratised, 49% of French people, 40% of Spaniards and 33% of Germans, have never or nearly never used such services.

...but they apply different criteria when choosing where to stay

- **When choosing accommodation, Europeans have access to a range of different information sources.** They turn first to two sources of advice: the recommendations of other holidaymakers on booking sites (used by 54% of French people, 49% of Germans and 37% of Spaniards) and recommendations from people they know (44% of Spaniards, 40% of Germans and 34% of French people). While 15% of Spaniards also consult travellers' blogs when planning their holidays, this is less common for their European neighbours (8% of Germans and French people). In contrast, recommendations from colleagues (between 5% and 8% depending on the country) are not generally sought.
- **Price aside, Europeans consider very specific criteria when choosing their hotel, depending on nationality.** French (58%) and Germans (45%) give the greatest importance to the hotel's proximity to tourist activities or sites. Spaniards, however, want the best solution in terms of comfort (58%), with proximity to tourist activities being only the number two priority (39%). Ancillary services are also a leading consideration for many travellers choosing a hotel (33% in France, 40% in Germany and 27% in Spain), as are recommendations by former customers online or by friends and relations (important for 26%, 19% and 27% in each country, respectively) and Wi-Fi connection (25%, 27% and 15%). They also like having flexible cancellation arrangements, particularly in Spain (25%, compared to 22% in France and 17% in Germany). Safe surroundings appear to matter little to the French (14%) but are more important for Spaniards (23%) and particularly for Germans (27%).

Hotel chains are liked for their service quality and reliability

- **European travellers choose hotels as their first choice of accommodation, in particular, because of the many, high-quality services they offer.** They like the fact that hotels are able to offer an overall high-quality service (96% in Spain, 86% in France and 82% in Germany) and that there is less chance of being unpleasantly surprised (between 83% and 94%). Similarly, they find that booking into a hotel gives them access to a wide choice of ancillary services, such as beauty treatments and sports equipment (83% in France and Germany, 92% in Spain). Those surveyed also acknowledge that their stay in a hotel offered good value for money (89% in Spain, 82% in Germany and 77% in France), although this was rated the least important factor by respondents in all three countries.
- **Travellers find services at hotels which are less available with private homestays, but which make the difference for them.** Pleasure and relaxation seem to be the big deciding factors: when staying at a hotel, Europeans like the fact that they will be served an ample breakfast (cited by 81% of Germans, 68% of the French and 52% of Spaniards), and that they can access sports and leisure facilities, like swimming pools or spas (58% of Spaniards, 49% of Germans and 39% of French). Likewise, good quality beds are greatly valued, particularly by Spaniards (35%) and French people (49%). Travellers are sensitive to being able to relax free from their daily chores, such as making the bed (37% in France, 39% in Germany and 41% in Spain). Having a television with a wide range of channels is important to more than one-in-five Europeans (21%, 20% and 30% in each country). Likewise, they like the little accessories and things you get in a hotel (22%, 17% and 23%), while having a minibar seems less of a priority (5%, 11% and 15%).



1

Hotel stays :
the preferred option
for Europeans

Accommodation
that best suits Europeans
HOTELS



2

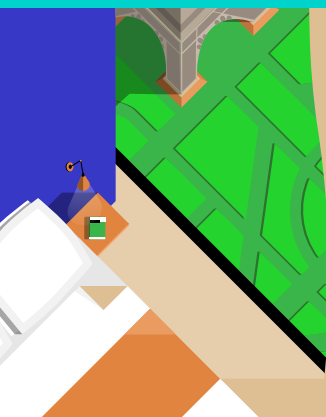
Hotel booking :
leading role of recommendations
in the choice of accommodation

54%
OF FRENCH
&
49%
OF GERMANS

pay particular attention
to the comments
of other holidaymakers
before booking

44%
OF SPANIARDS

give more weight
to the advice
of friends
and relations



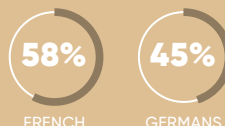
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Hotel booking :
looking for
specific criteria

CRITERIA N°1

Hotel's proximity
to tourist activities or sites

Hotel's class
and comfort



4

Hotel chains :
service quality
and reliability

high-quality services

They offer



less chance of being unpleasantly surprised



5

Hotel chains :
access to a wide choice
of ancillary services

68%
OF FRENCH &
81%
OF GERMANS
like the fact that they will
be served an ample breakfast

58%
OF SPANIARDS

because they can access
swimming pools or spas

“opinionway



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