

## comScore Study Finds Online Hotel Bookings Continue to Shift From Online Travel Agencies to Supplier Sites

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comScore, Inc. (NASDAQ:SCOR), a leader in measuring the digital world, today released a study of the online travel industry, which showed that supplier websites account for 72 percent of online hotel spend as of first quarter 2008, a 3-percentage point increase in dollar share from the previous year.

Hotel market share through online travel agency sites (e.g. Expedia and Orbitz) is now 28 percent, 3-percentage points down from a year ago.

### Dollar Share of Online Hotel Bookings between Supplier Sites and Online Travel Agencies

Total U.S. - Home/Work/University Locations

Source: comScore, Inc.

Web sites	Q1 2007	Q1 2008	Point Change
Supplier Sites	69.2%	72.4%	3.2
Best Western	2.5%	3.8%	1.2
Choice Hotels	6.2%	6.7%	0.6
Hilton	19.3%	18.8%	-0.5
Hyatt	2.6%	2.4%	-0.2
Intercontinental Hotels Group	12.0%	12.4%	0.4
Marriott	16.8%	18.1%	1.3
Radisson	0.5%	0.4%	0.0
Starwood	5.7%	5.6%	-0.1
Wyndham Worldwide	3.7%	4.2%	0.5
Agency Sites	30.7%	27.6%	-3.2
CheapTickets.com	0.9%	0.8%	-0.1
Expedia.com	9.8%	9.1%	-0.7
Hotels.com	6.2%	6.8%	0.6
Hotwire.com	1.2%	1.5%	0.4
Orbitz.com	4.8%	3.0%	-1.8
Travelocity Brand	7.9%	6.4%	-1.5

\*Excludes auctions and managed travel.

The increase in dollar share among supplier sites is being driven by several economy brands, such as Best Western (up 1.2 points) and Choice Hotels (up 0.6 points). Marriott, which includes both economy and premium brands, experienced the most significant increase of 1.3 points. Meanwhile, online travel agency sites lost dollar share as consumers booked directly on the supplier sites.

"The current economy has many consumers and business travelers tightening their belts, and the travel industry is certainly feeling the impact," said Kevin Levitt, comScore vice president. "Customers are becoming more cost-conscious, seeking modestly priced alternatives for their hotel stays."

### Economy Hotel Brands Increase Paid Search Advertising in Down Economy

Given the current economic conditions, some hotel groups are shifting their online ad dollars away from premium brands. Consider as an example the Intercontinental Hotels Group, which owns both premium and economy brands. Its economy brand, Holiday Inn Express, increased its total number of paid search link exposures by 16-percent, while its premium brands, like Crowne Plaza (down 41 percent) and Intercontinental (down 26 percent), reduced exposures.

### Intercontinental Hotel Brands Paid Search Link Exposures

Total U.S. - Home/Work/University Locations

Source: comScore Marketer

	Total Number of Paid Search Link Exposures		
	Q1 2007	Q1 2008	Percent Change Y/Y
Intercontinental Hotel Brands	55.1	48.5	-12%
Holiday Inn	30.7	30.8	1%
Holiday Inn Express	16.2	18.8	16%
Crowne Plaza	13.4	7.9	-41%
Intercontinental	6.6	4.9	-26%

"With consumers shifting their spending toward lower-cost alternatives, it makes sense that marketers would be shifting their ad spending accordingly to achieve better marketing ROI," added Mr. Levitt.

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