Reality Check

Understanding the Customer Journey

Fight through the
Clutter
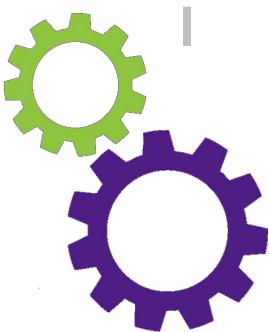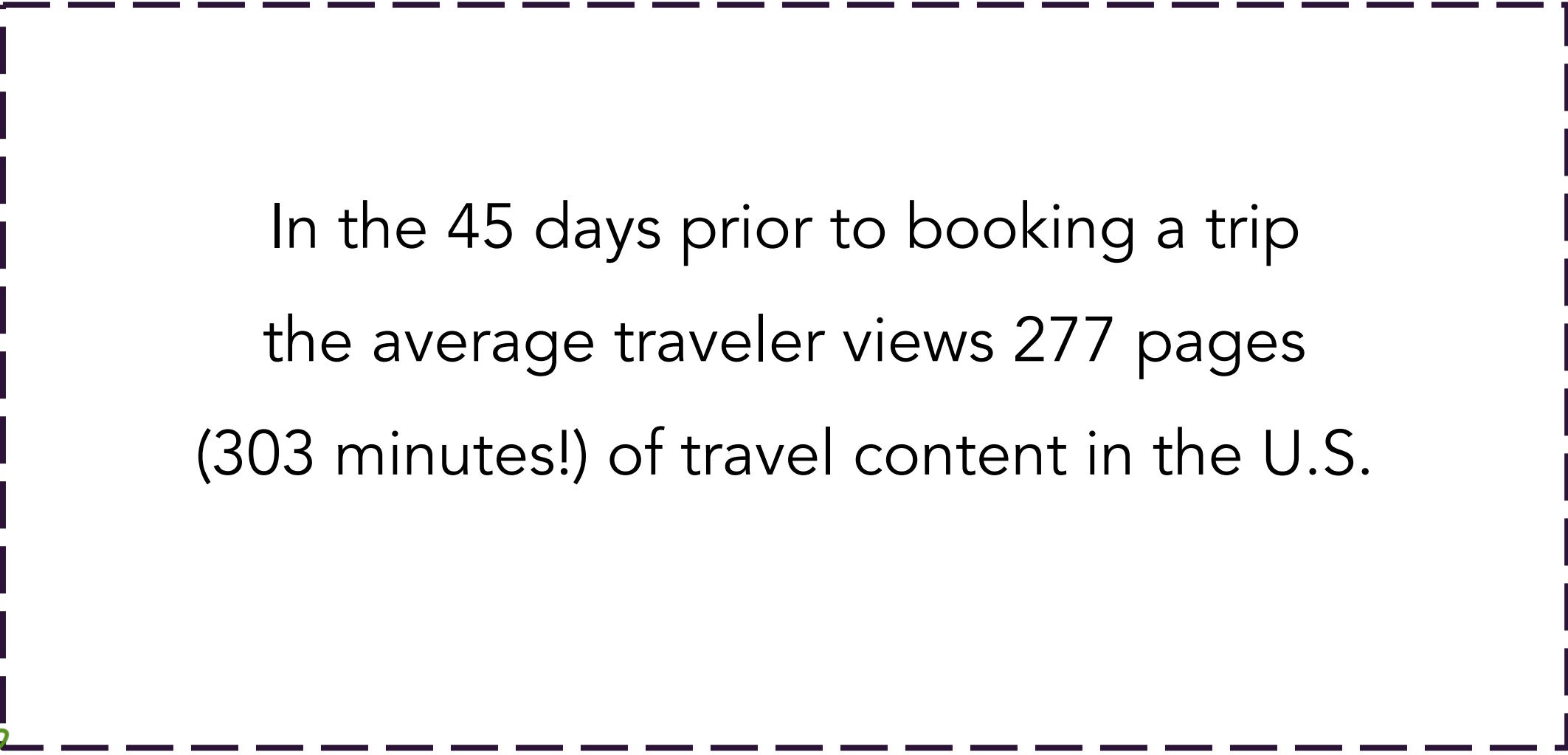
In the 45 days prior to booking a trip
the average traveler views 277 pages
(303 minutes!) of travel content in the U.S.
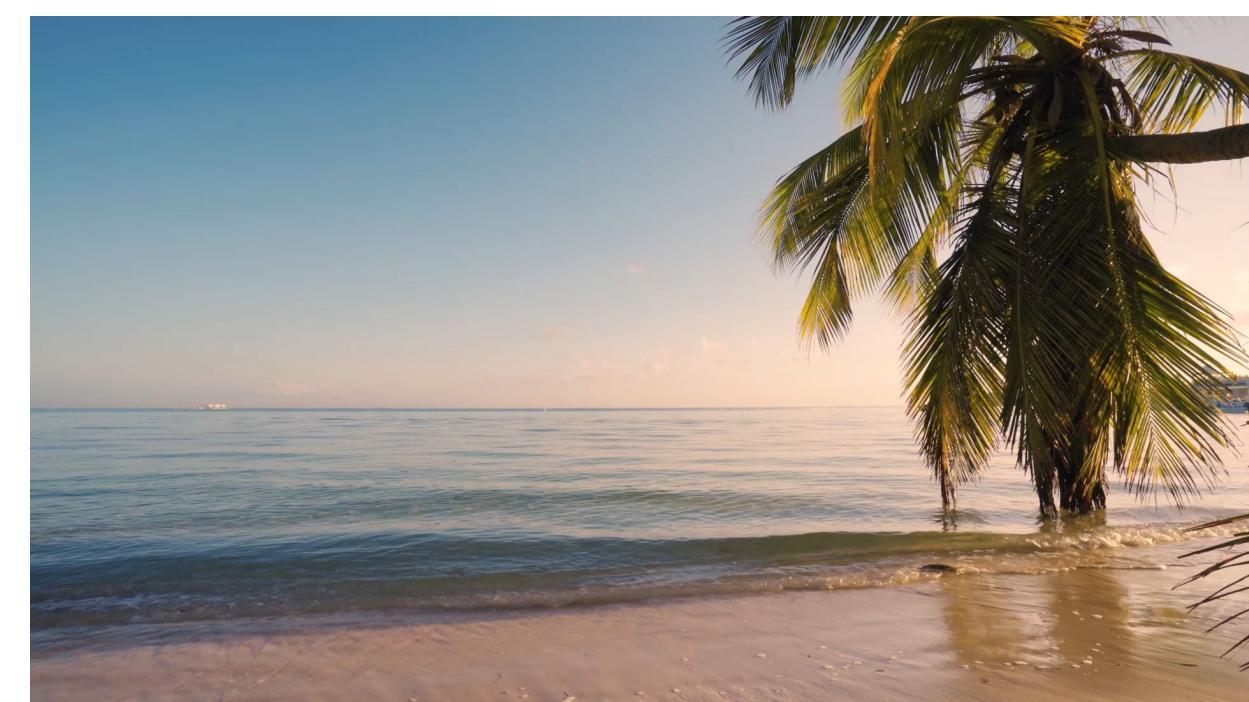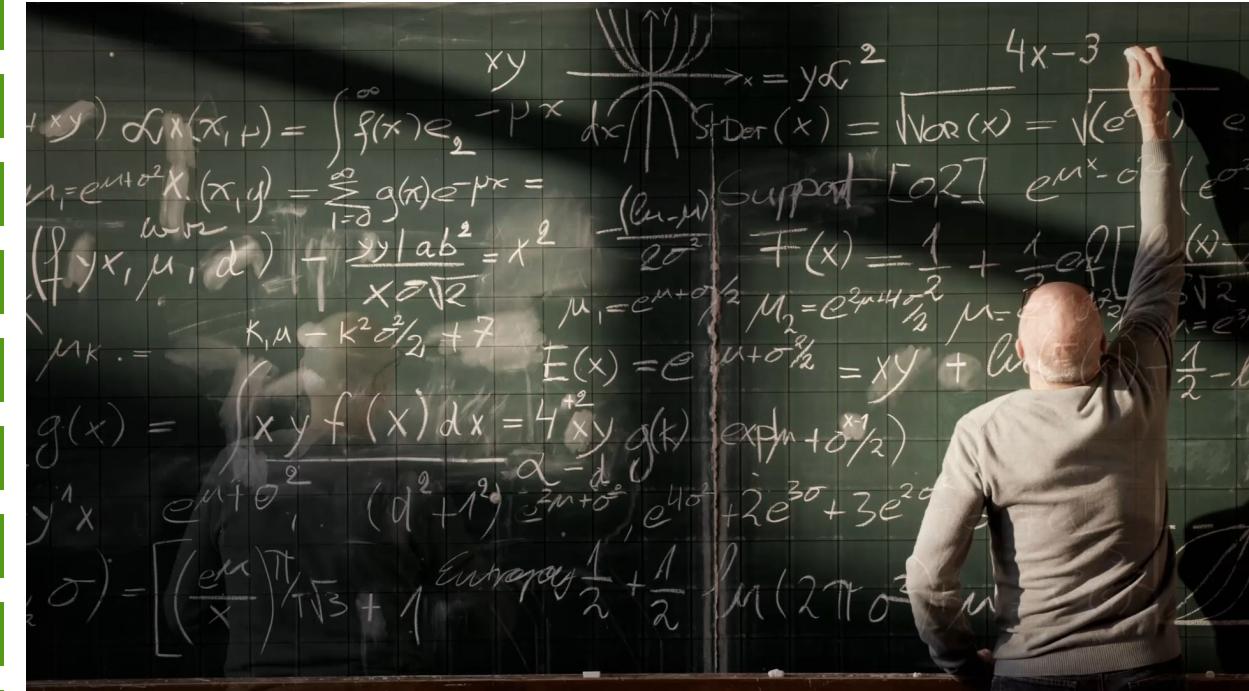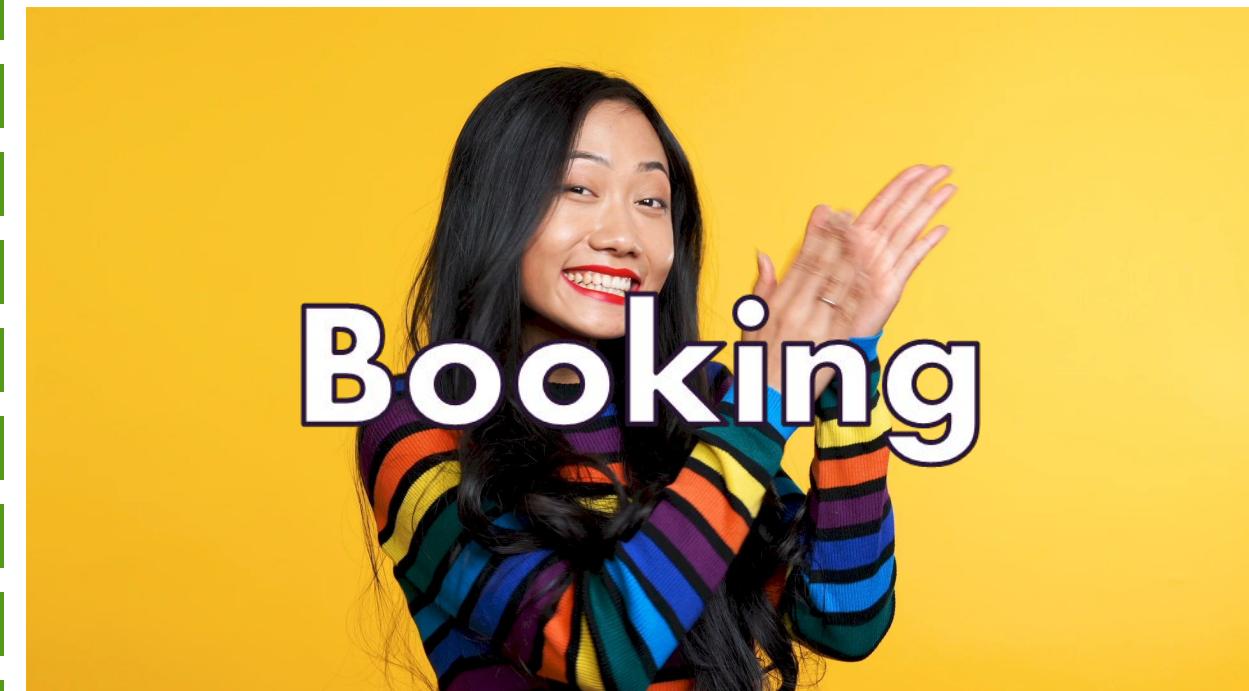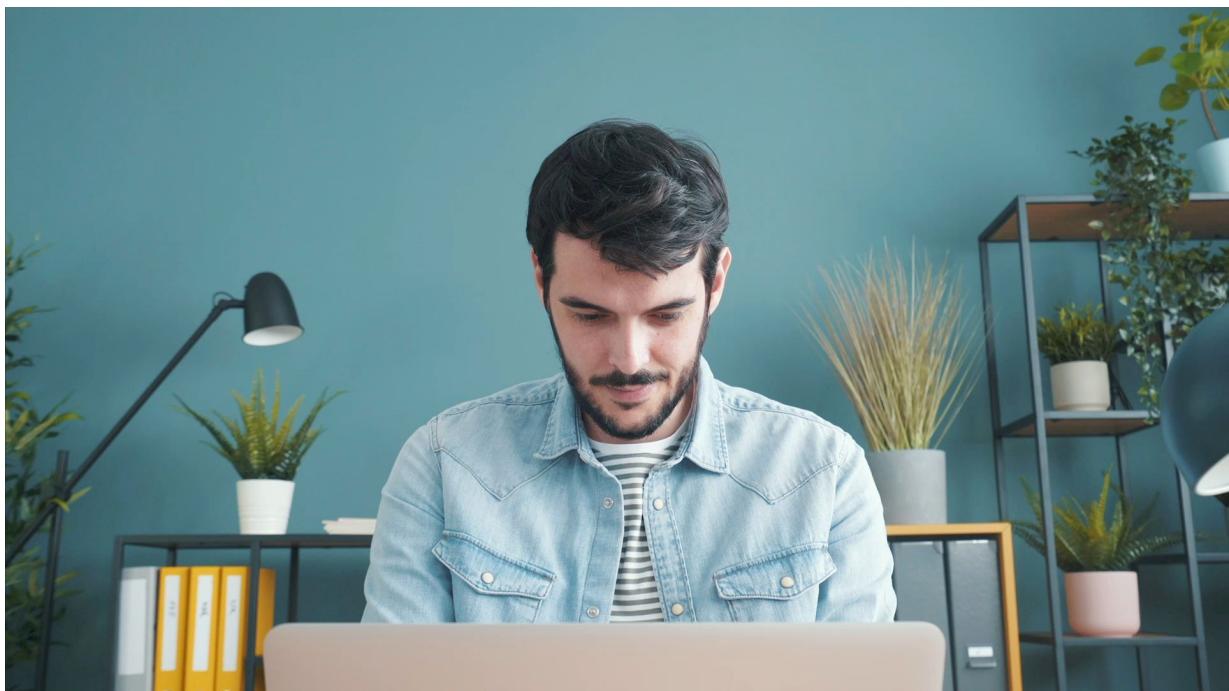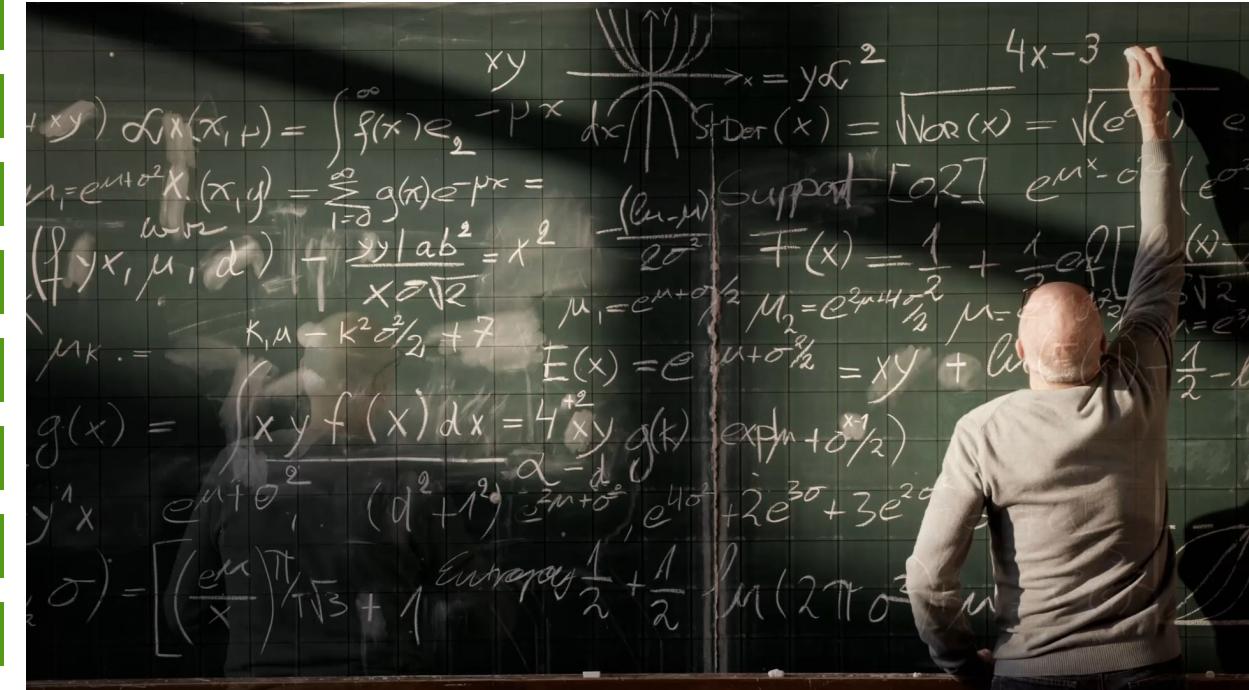
Research

Planning

Customer Journey Timeline

Inspiration

33 Days

Research & Planning

38 Days

Booking   1 Day

Post Purchase

Expedia Path to Purchase 2023
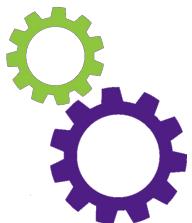
Customer Journey Channel Mix
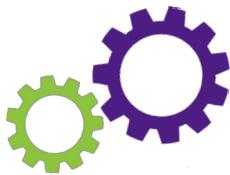
Legend:
- Social media
- Destination site
- Search engine
- OTA
- Meta travel site
- Vacation rental site/app
- Rail site/app
- Hotel site/app
- Airline site/app
- Car rental site/app

X-axis: Inspiration, Research, Planning, Booking
Y-axis: 0%, 20%, 40%, 60%, 80%
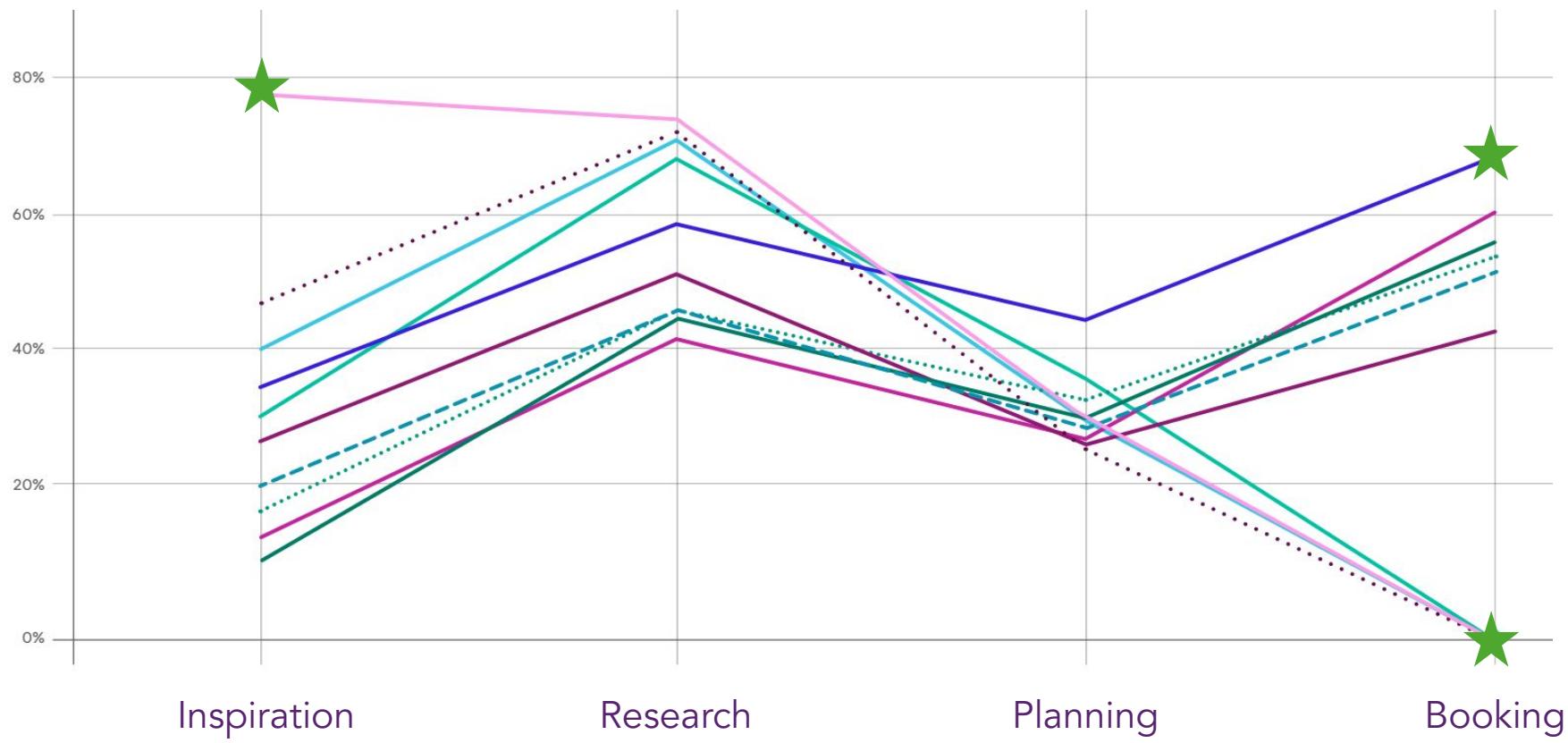
*Expedia Path to Purchase 2023

Ad Recall Per Phase

Inspiration 67%

Planning/Research 39%

Dead Zone?

Booking 7%

*Expedia Path to Purchase 2023
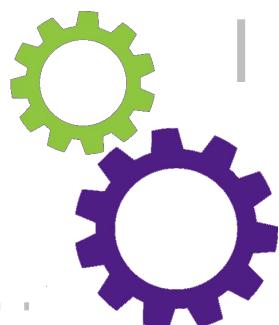
POLE

#2
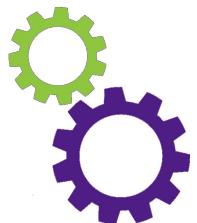
Impact of AI & LLMs

AI & Personalization:

Yes & it wasn't helpful | 16.5%

No, but I would try it | 31.5%

Yes & it was helpful | 35.75%

No & I'm not interested | 16.25%
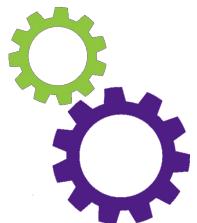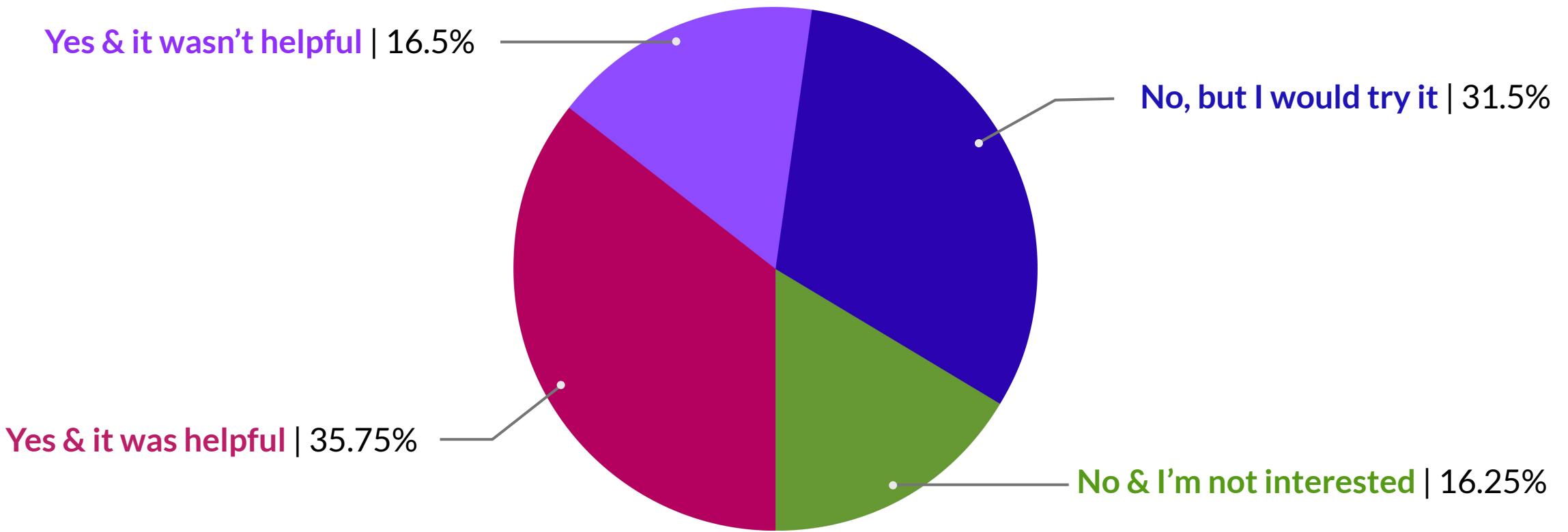
Gen Z embraces personalization & AI the most; Baby Boomers are the most skeptical

Decoding Online Shopping: Travel & Hospitality Consumer Trends for 2025 (by AB Tasty & Phocuswire)
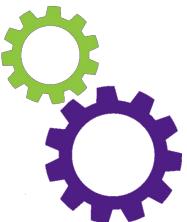
Why is ROAS misleading?

Why I'm a Metasearch Hater...
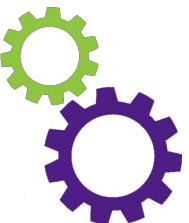
Read more about Metasearch here:

REPEAT AFTER ME: "MetaSearch is not incremental revenue"

Read more about Metasearch here:

INSPIRATION

ANALYSIS

RESEARCH/
PLANNING

ADD ON
ON-SITE
OPERATIONS

RETENTION

BOOKING

ADD ON
REVENUE
MANAGEMENT
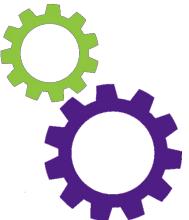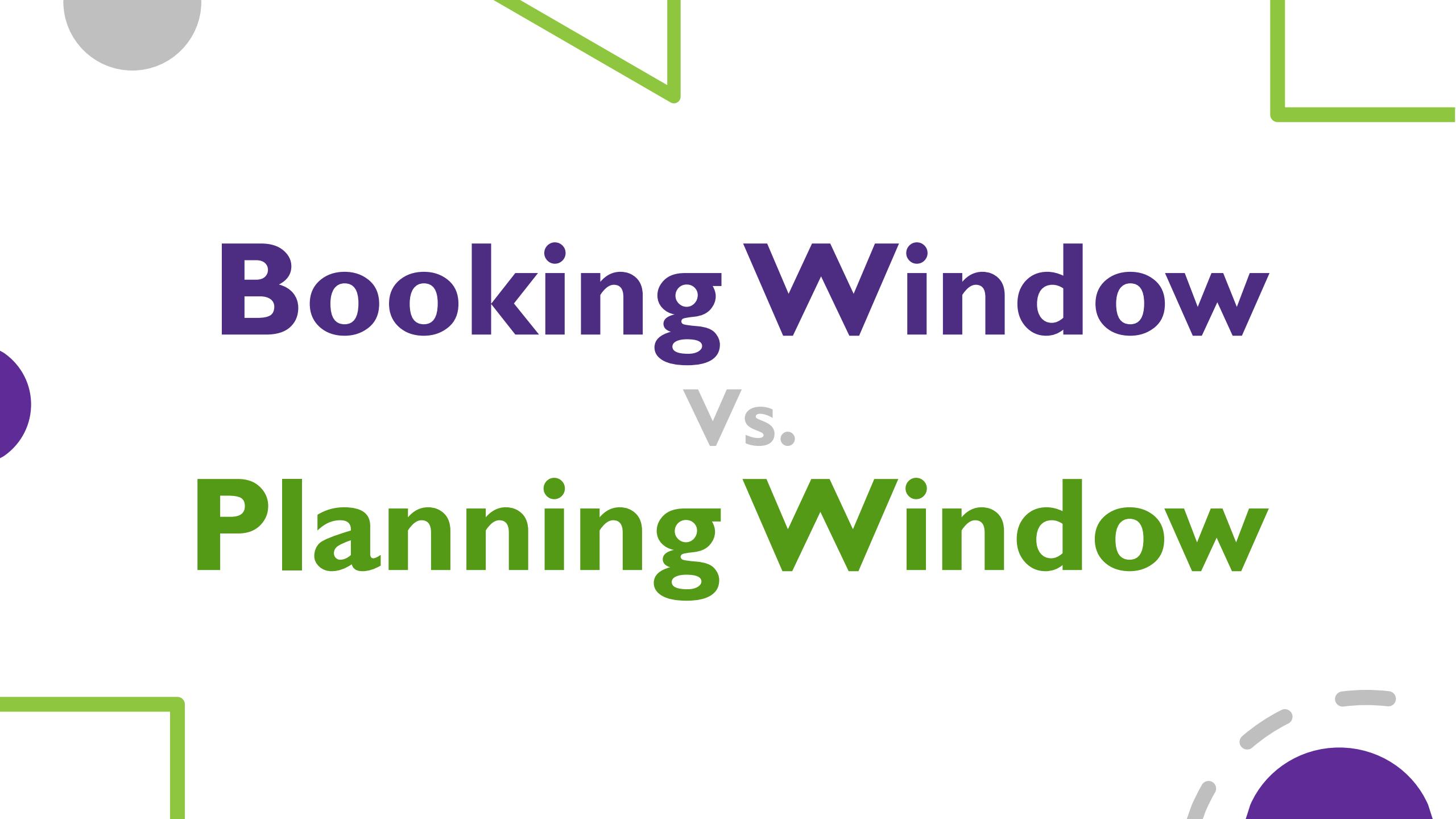
Booking Window

Vs.

Planning Window
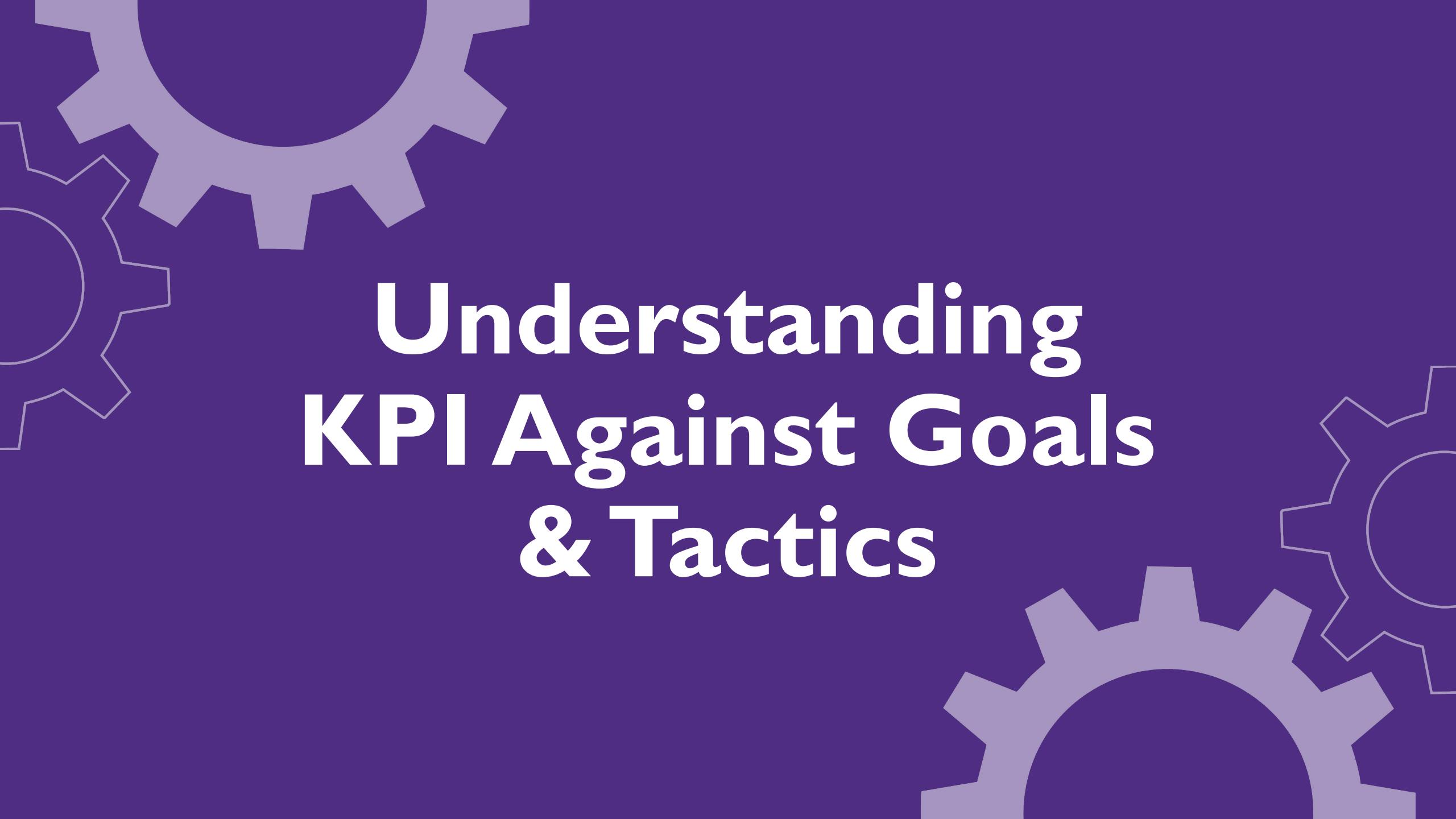
Understanding KPI Against Goals & Tactics

Budgeting Process
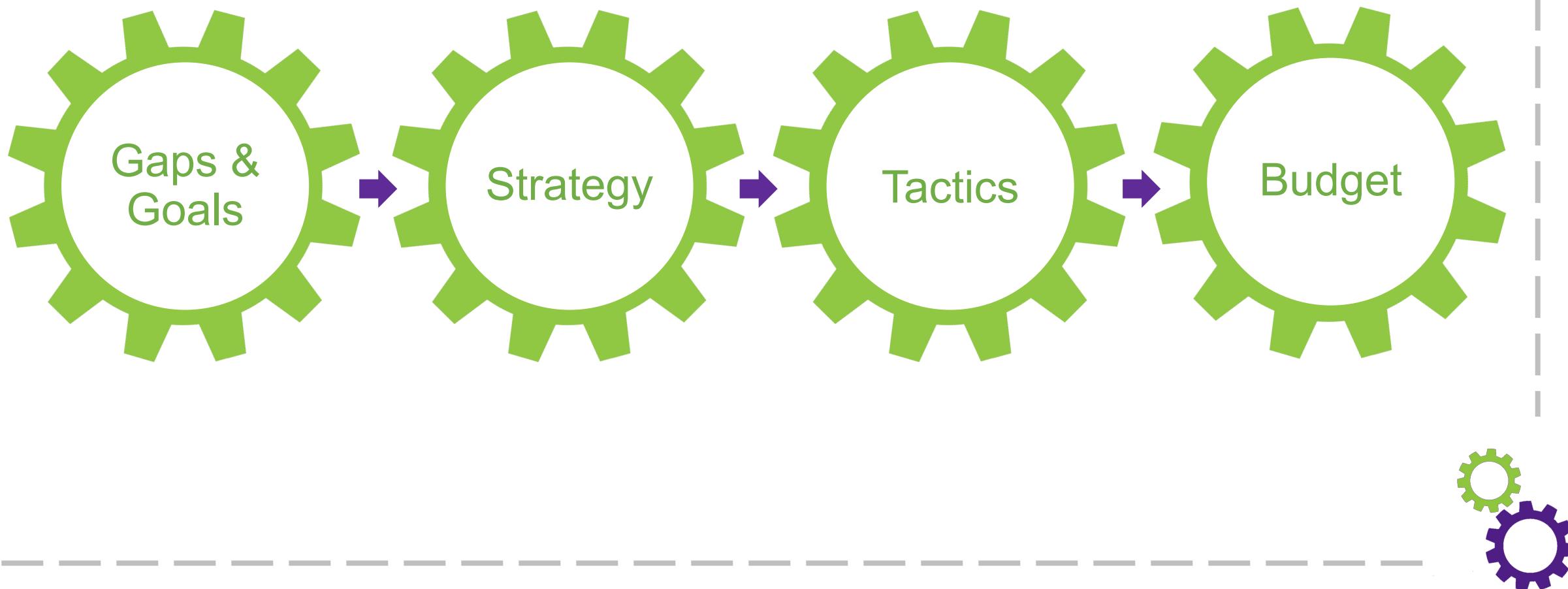
Full Funnel Approach-Top

This is not an exhaustive list of media options, but a summary of top options that go into a property's strategy at each stage.

INSPIRE / RESEARCH

| MEDIA	KPI EXAMPLES	RELATIVE COST	RELATIVE ROAS
• Paid Search - Prospecting Terms	• Site visits, bounce rates, page views	**$$$**	**-/+**
• Paid Social - Prospecting	• Click through rates		
• Audience Targeted Display	• Shop rates at or near 20%		
• Organic SEO	• Cost per view & cost per click		
• Video & OTT Ads	• Share of voice or impression share		
• Display - Prospecting			
• Listings/Directories			

Full Funnel Approach-Middle

PLAN

MEDIA

- Paid Search - National Brand Terms
- Email - Groups & Events
- Non-Brand Paid Search
- OTA & GDS (sponsored listings)
- Video Ads
- Paid Social - Retargeting
- Display - Remarketing

KPI EXAMPLES

- Site visits, engagement rates, page views
- Click through rates & cost per click
- Impressions & Impression share
- Rate Shops >25%
- Some Measured ROAS at or above 4:1 ROAS
- Quality scores

RELATIVE COST

$$
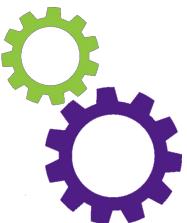
RELATIVE ROAS

+
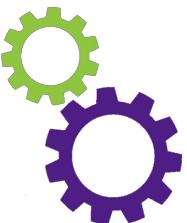
Full Funnel Approach-Bottom

● **BOOK**

MEDIA	KPI EXAMPLES	RELATIVE COST	RELATIVE ROAS
• Paid Search - Property Brand Terms • GDS • Meta Search • Expedia / Booking.com Targeted Search • Email - Transient / Past Guests	• Win the booking from other channels. Conversion rates 2-3%, channel contribution >40%. • Same points as above • ROAS Expectation – elevated, at or above 8:1	$	++
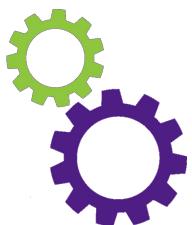
The Future of hotel Marketing KPIs

Lifetime Value or Transient Market Share
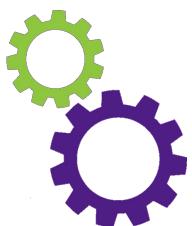
Benchmarking

1. Same Market
» Compare your hotel's performance against similar hotels in the same market
» Available in 37 DMAs, all hotel types included

2. Same Chain Scale
» Benchmark by chain scale (Costar categories)
» Identify strengths and opportunities across similar hotel categories

3. Portfolio Comparison
» Compare hotels within your own portfolio
» Pinpoint top and bottom performers for growth opportunities

4. Weighted Historical Average
» Compare your hotel's performance against prior years
» Most recent years weighted higher to focus on relevant comparisons

Top KPIs We Benchmark

1. Channel Mix: Brand.com percentage

2. Channel Mix: OTA percentage

3. Conversion percentage

4. Percentage of Search Traffic

5. Percentage of MetaSearch Traffic

6. Percentage of Social Traffic

7. Number of Social Impressions

8. Social Media Spend

9. OTA Ads Spend

10. OTA Ads ROAS
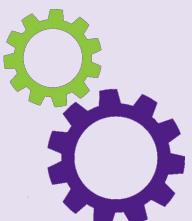
Lower Funnel Focus
ROAS: 13.88x

- 38.7% — Brand.com
- 20.4% — Property Direct
- 16.2% — GDS
- 17.4% — OTA
- 2.2% — Wholesale
- 0.1% — Other
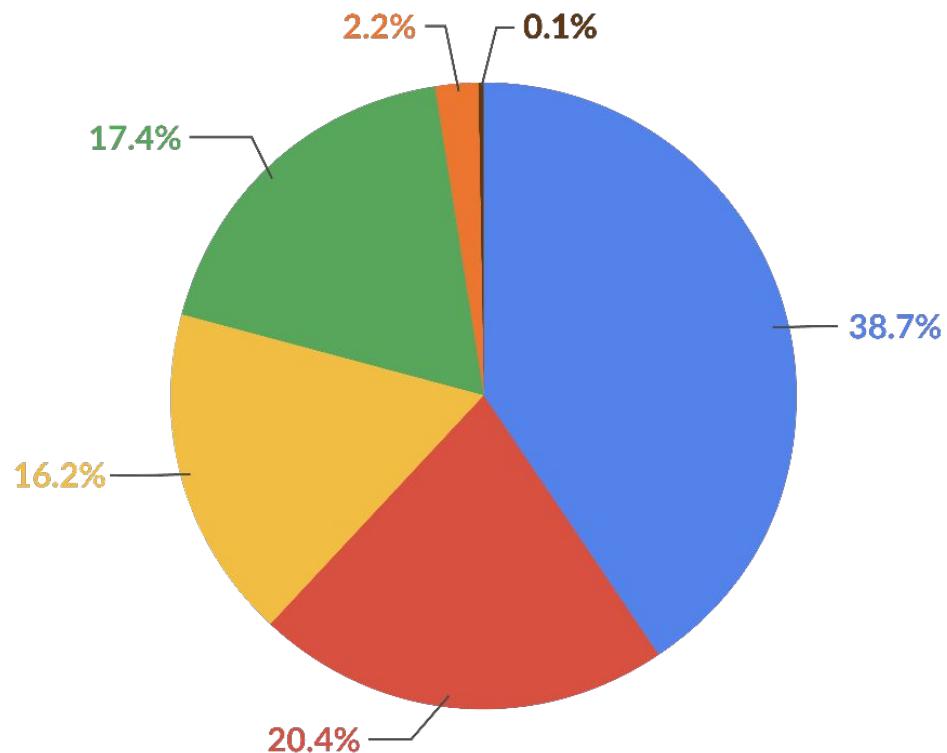
Upper/Middle Funnel Focus
ROAS: 6.29x

- 46.3% — Brand.com
- 25.6% — Property Direct
- 9.2% — GDS
- 7.9% — OTA
- 2% — Wholesale
- 0.2% — Other
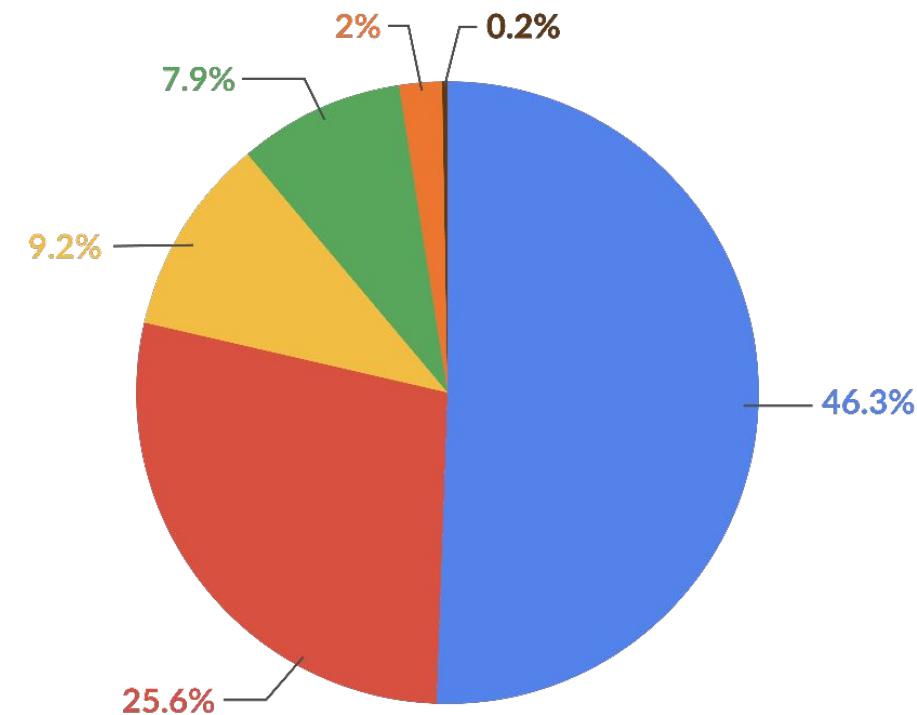
Legend: Brand.com | Property Direct | GDS | OTA | Wholesale | Other

* Cogwheel Analytics January 2025 - June 2025 for 555 Branded Hotels
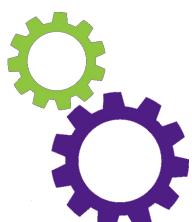
POLE
#3
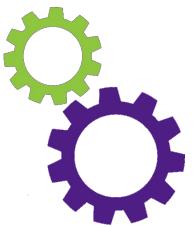
Key Takeaways

1.

Over-prioritizing ROAS often leads to underinvestment in brand-building & overreliance on lower-funnel tactics, driving up acquisition costs and limiting long-term growth. *~ Sojern*

2.

Each KPI matter, but it depends on Goals + Stage of the customer journey + type of customer

3.

There are different tactics that can align with a strategy, and there are multiple strategies that can fix a gap or goal.
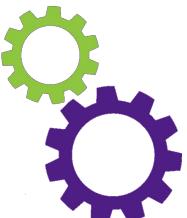
Learn More

Visit our website & sign up for our Newsletter
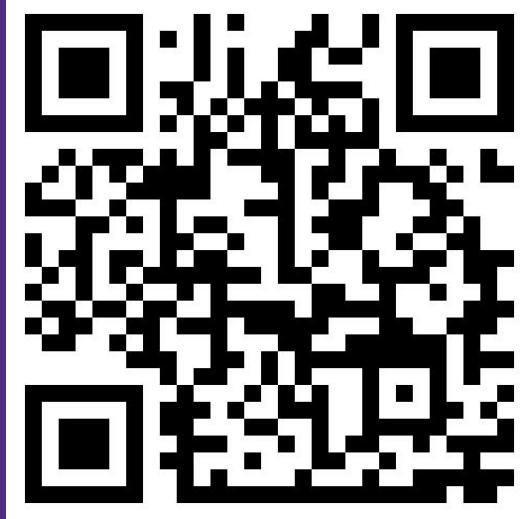
#1 • Determining your Hotel's Channel Strategy within Koddi
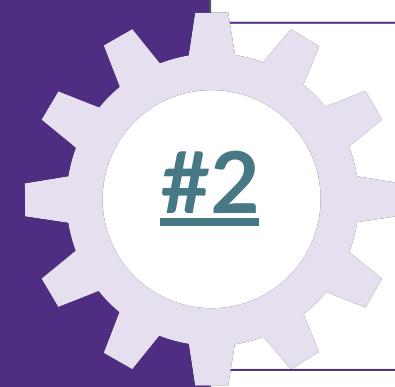
#2 • Sample Hotel Commercial Scenarios & How to Develop Budgets to Solve with Digital Marketing
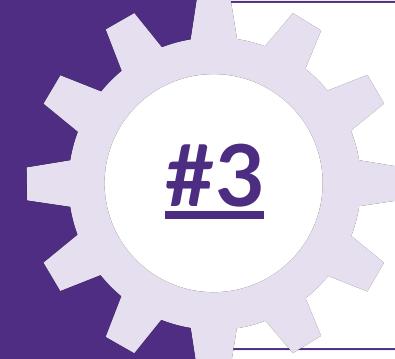
#3 • A Hotel Marketer's Bold Blueprint for Unified Commercial Strategy

We will be in HFTP Orlando

From Plan to Success: Mastering Project Management for Smooth System Implementations

Location: Salon 1/2

Friday, October 24

1:15 PM – 2:15 PM

Ben Golson

Chief Operating Officer
Cogwheel Analytics

THANK YOU!

Follow me on LinkedIn:

Stephanie Smith

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Marketing & Cogwheel Analytics

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