

## Hotels - US - November 2012

### Scope and Themes



*“While hotel industry revenues are increasing, the cost of overnight stays continues to be a concern among consumers overall, and the youngest that have the highest incidence of hotel use. There is incentive for hoteliers, owners, and operators to consider more ways to justify fee increases as being necessary to maintain their locations’ overall value for the money and how they may be better able to market events and activities to non-guests to open yet another revenue stream.”*

– **Gretchen Grabowski, Travel & Leisure Analyst**

### In this report we answer the key questions:

- **Are hoteliers doing enough to justify rising costs?**
- **Might rate and fee increases impede enthusiasm for overnight stays?**
- **What more can hotels do to finance innovation?**

Revenues for U.S. accommodations are forecast to increase by 22% over the next five years, to reach \$171.9 billion in 2017. As the country continues its slow economic recovery following the 2007-09 recession and Americans have greater financial stability—and likely, discretionary income—those that went without leisure travel during the more difficult years are returning to the market. As such, overnight hotel stays are becoming more feasible and something that Americans are willing to fund for their personal travel. However, while consumers may be more willing to spend money on hotel stays, hoteliers may still need to justify increased room prices and ancillary fees so travelers continue to perceive value.

This report covers the frequency with which consumers are staying overnight at hotels, and the reasoning behind their decision to do so. It also discusses consumers’ propensity to use different types of accommodations other than hotels, as

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well as the factors motivating and impeding hotel stays, as well as those factors that influence hotel choice. General attitudes about hotel stays and consumers' interest in various enhancements to hotels are also included. Hotel owners, operators, and marketers can use the information in this report to understand consumers' attitudes toward hotel usage—particularly when traveling for personal reasons—in developing methods to further increase use and willingness to pay for the industry's offerings.

This report builds on the analysis presented in Mintel's *Hotel Accommodations—U.S., November 2011* and the September 2010 report of the same title, as well as *Hotels and Accommodations—U.S., September 2008*.

The report covers developments in the U.S. hotel industry, primarily consumers' decisions and opinions about overnight stays for personal (holiday/leisure or family/friend) reasons. It covers commercial establishments that provide overnight lodging at a nightly rate, including hotels and motels, casino hotels, and bed and breakfasts.

- A **hotel** is defined as a collective accommodations establishment, which is primarily engaged in providing short-term lodging. Hotels may also offer food and beverages, recreational services, entertainment, conference rooms/convention services, laundry services, parking, and various personal services for the public. This includes hotels, motor hotels, resort hotels and motels, and excludes casino hotels.
- **Motels**, historically a separate category, are generally included in hotel figures today. Once considered "motor hotels" where travelers parked their cars outside the door to their room, motels today are considered to be hotels with limited services and amenities, thereby offering lower prices than full-service hotels.
- **Bed and breakfasts** are establishments primarily engaged in providing short-term lodging in private homes or small buildings converted for the purpose of providing short-term lodging. They are characterized by highly personalized service and inclusion of a full breakfast in the room rate.
- **Casino hotels** are defined as establishments primarily engaged in providing short-term lodging/hotel facilities with a casino on the premises. "Casino" is defined as a gaming facility that includes table-wagering games and may include other gambling activities, such as slot machines and sports betting. Casino hotels generally offer a range of services and amenities, such as food and beverages, entertainment, valet parking, swimming pools, and conference/convention facilities.

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