

BLUE PAPER

TRAVEL TRENDS:
THE RISE OF THE AIRPORT HOTEL

FEBRUARY 2016




Hilton
HOTELS & RESORTS

HILTON BLUE PAPER

AIRPORT HOTELS: MOVING FROM GOOD TO GREAT

Since 1959, when Hilton Hotels & Resorts opened its first airport hotel in San Francisco, and 15 days later its second airport hotel in New Orleans, we have been a leader in this category. With the recent opening of Hilton Amsterdam Airport Schiphol, we've taken a giant step forward, launching an airport hotel that will change travelers' ideas—and even challenge their assumptions—on what an airport hotel can offer in comfort, amenities, services and food. (For more on Hilton Amsterdam Airport Schiphol, please see page 18.)

The truth is, with more than 8 million people taking to the skies every day¹, airport hotels are a smart choice (for Hilton and for those taking flight). Airports around the world are transforming themselves into sophisticated destinations. They now feature more creative and upscale dining options, high-end shopping, great art and even spas. That's why we believe there has never been a better time to carry on Conrad Hilton's legacy as the innovator of the airport concept by opening world-class airport hotels that not only serve business travelers with outstanding business and meeting facilities, but also leisure guests with elevated design and sophisticated amenities.

We've taken this approach to heart, opening stylish, forward-looking and innovative hotels around the world including at airports in Frankfurt, Helsinki, Munich, London, Boston, Chicago, Atlanta, Los Angeles, Mumbai, Tokyo and Beijing in addition to Schiphol.

This new wave of hotels is transcending traditional airport hotels. More design-driven, they often offer resort-style amenities, including high-end spas like Hilton's eforea and upscale dining destinations. This modern approach is tailored for today's savvy travelers and has increased consumer relevance for business and leisure travelers alike.

Sometimes business and leisure travelers are one and the same. An increase in "blended travel," in which business guests extend their stay to include a weekend of leisure, has contributed to the interest in airport hotels as leisure destinations. Today there is an increased demand among leisure travelers seeking airport destinations. By providing leisure offerings such as spas, swimming pools and multiple culinary venues, we are able to better meet the needs of a wide variety of travelers.

To celebrate the opening of Hilton Amsterdam Airport Schiphol, we conducted a survey of the airport hotel sector by soliciting opinions about a wide range of topics from past, current and potential guests of airport hotels. In this Hilton Blue Paper, we present the survey's (sometimes surprising) results, analysis and opportunities they suggest for Hilton and for our industry peers.

If this report could be summed up in one sentence, it would have to be: Airport hotels are taking off!

Sincerely,



Shawn McAtee
Vice President, Global Brand Management, Full Service Brands
Hilton Worldwide

1. Source: International Airport Transport Association (IATA)



*Hilton San Francisco Airport,
U.S. (1959)*



EXECUTIVE SUMMARY

With room demand at airport locations having grown from an average of 55 million room nights in 2010 to 65 million in 2015², airport hotels are an increasingly important segment in the hotel industry. As a pioneer in the airport hotel category, we conducted this survey to understand how guest expectations are changing and how airport hotels are responding to them today, as well as how these hotels can continue to stay relevant to travelers in the future.

Among other topics, this report:

- Identifies criteria both business and leisure travelers use to choose hotels, highlighting value, amenities and location
- Looks at who stays at airport hotels and how guests choose these hotels
- Discusses why some people who have stayed at airport hotels say they do not intend to stay at them again and showcases concepts for next-generation airport hotels that may help evolve out-of-date perceptions of these hotels among this group of people
- Delves into amenities and how their relevancy over time impacts guest preferences and perceptions, and how this can predict where the industry is moving
- Showcases Hilton Amsterdam Airport Schiphol, which is celebrating its grand opening in February 2016

In sum, what we found is that the majority of people view airport hotels as places to stay for two principal reasons: business and due to missed or inconvenient flights. Among those whose primary purpose is business, however, amenities such as dining options and spa and wellness services remain important. For all travelers, whether they believe their trip was successful is directly tied to satisfaction with their hotel.

Even though the majority agreed their experience at an airport hotel was positive, negative perceptions of airport hotels are ingrained. This is especially true among travelers who have stayed at an airport hotel in the preceding 12 months, who describe these hotels as "boring," "expensive," "crowded" and "outdated."

And yet, when they were shown visual representations of a new generation of airport hotels, such as Hilton Amsterdam Airport Schiphol, minds were changed. When asked how likely they were to stay at a next-generation airport hotel after seeing the new concepts:

- Nearly all travelers—ranging from 92 to 99 percent—indicated interest in at least some aspect of the airport hotel concepts
- Large majorities of travelers—as high as 87 percent—who previously indicated they were unlikely to stay at an airport hotel agreed that they were likely to stay at an airport hotel

The bottom line is that among those surveyed, amenities and modernization are differentiators that motivate people to choose particular brands and specific hotel destinations. This is good news for Hilton, as well as for the industry overall.

2. Source: STR

ABOUT THIS SURVEY

Our online survey included 5,506 travelers ages 18+ in the United States, United Kingdom, Germany, the Netherlands and China (approximately 1,000 per country) in order to understand perceptions around airport hotels and gauge interest in the next-generation concepts of airport hotels.

To be eligible participants must have traveled for either business or leisure at least once in the past 12 months and have stayed at a full-service hotel at least twice during that time.

To ensure a common understanding of what constitutes an airport hotel, for the purposes of the survey we defined an airport hotel as a full-service hotel within two miles of an airport that also offers sponsored transportation to and from the airport.

As it turns out, travelers agree with this definition: across the five geographies surveyed, "shuttle service to the airport" and "convenient location" were among the top amenities they know airport hotels provide.

CHINA: AN UPBEAT OUTLIER

Throughout this survey, results from China often appear far different than those from the other countries surveyed. Reasons for this variance may include:

- Differences in hospitality and service-industry traditions
- Differences in communication styles (Asian cultures tend to be more positive)

None of this diminishes the opinions and beliefs of these respondents, of course, who represent one of the largest and fastest-growing segments of global travelers.



Hilton Beijing Capital Airport, China



SECTION 1: CHOOSING A HOTEL

The majority of business travelers feel there is a connection between their satisfaction with their hotel stay and their ability to perform their job well.

Those who travel for business and those who travel for leisure emphasize different sets of criteria when choosing a hotel, though our research suggests that common denominators between them exist.

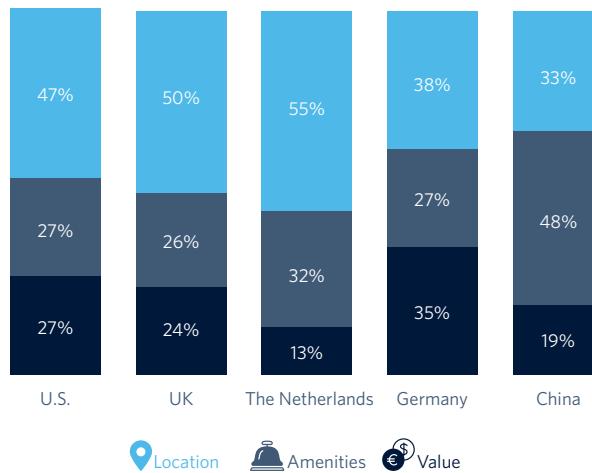
Business travelers

Our research shows that a majority of business travelers (89%+) prefer to stay close to where their work will take place.

- In fact, location is the most important consideration among all respondents other than those from China, for whom amenities take precedence.
- Value is the least important consideration for business travelers, perhaps because they are not paying for their stays themselves.

While business travelers are away from home, they still want their hotel to feel like it is their home (63%+), with amenities available that will help them to relax or otherwise enjoy their stay. A majority (61%+) say they "always try to use hotel amenities like bars and spas as a way to relax when traveling for work."

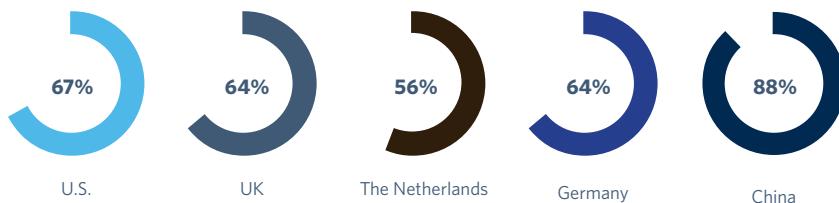
FIGURE 1



When business travelers were asked which attributes were most important when choosing a hotel, location scored highest except among the Chinese.

Perhaps the most interesting data point, and one the hotel industry should take into account as it looks to the future, is that the majority of business travelers (between 56% and 88%) feel that there is a connection between their satisfaction with their hotel stay and their ability to perform their job well.

FIGURE 2



If I am not satisfied with my hotel, I will not be able to perform my job as well.

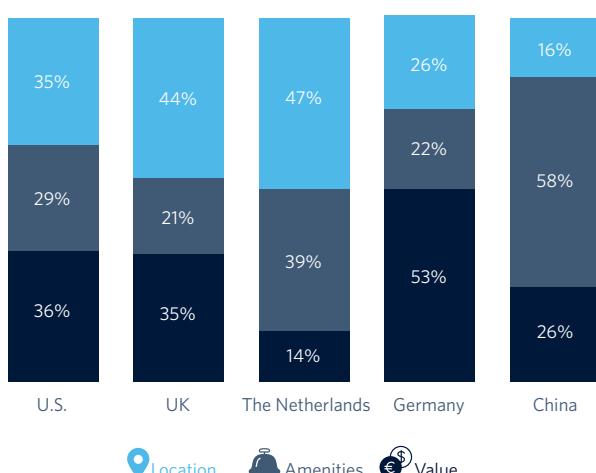
Leisure travelers

Just as business travelers prefer to stay near where their work will be, our research shows the majority of those who travel for leisure want to stay where the action is:

- Near the places they believe they'll be visiting most (91%+)
- In the most popular parts of town (64%+)

Location, however, is the most important consideration only for those from the UK (44%) and the Netherlands (47%). Despite that, location is still "most important" for fewer than 50 percent of people overall. In the U.S. and Germany, value is most important, while among Chinese respondents, amenities top the list.

FIGURE 3



When leisure travelers were asked which attributes were most important when choosing a hotel, location scored high, though value also became an important factor.



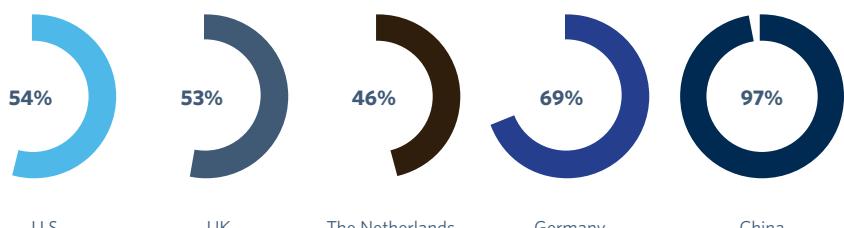
Hilton Rome Airport, Italy



For most leisure travelers (between 53% and 97%) their choice of hotel impacts their satisfaction with their trip overall. For the Chinese (97%) and Germans (69%), their hotel is “the most important part” of their trip.

FIGURE 4

Except for in the Netherlands, most leisure travelers also feel their hotel is important to their overall satisfaction with their trip.



My hotel is the most important part of my trip.

When traveling for leisure, our research shows that except for the Chinese, more than half of these travelers (51%+) believe that hotel amenities “are not worth the extra price you have to pay for them” and that they “hate” paying more for hotels, even if it means they will have access to better amenities.

OPPORTUNITIES

- Those who travel for business appear to appreciate hotel amenities more than those who travel for leisure, which suggests an opportunity to enhance amenities that appeal to business travelers even further while also broadening the appeal of amenities to leisure travelers.
- While the majority of all travelers do not feel an upper upscale hotel is a requirement in order for them to enjoy their trip, they do agree they want a hotel that is more than just a place to sleep. In fact, the majority of both business and leisure travelers feel their satisfaction with their hotel is integral to their overall satisfaction with their trip.

SECTION 2: CHOOSING AN AIRPORT HOTEL

Among a majority of respondents, the experience of staying at an airport hotel impacted their overall view of the brand (mostly for the better!).

While the hotel industry may be introducing new concepts of airport hotels, airport hotels generally are not a new concept to most people. Among respondents, familiarity with airport hotels ranges from 51 percent among those from the Netherlands to 83 percent from respondents in China.

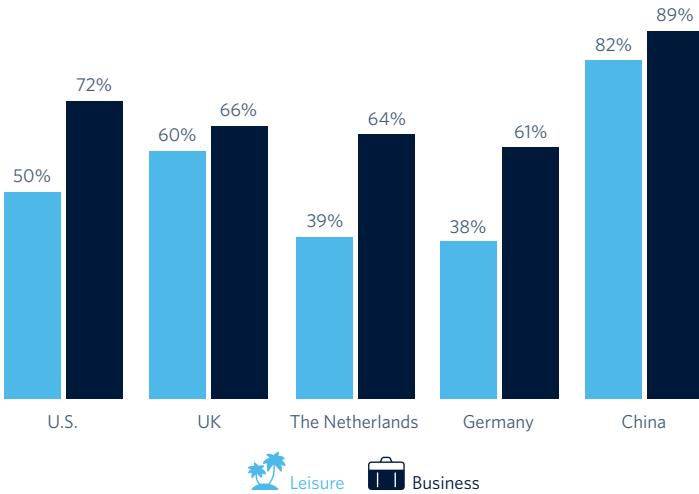
In fact, the majority of full-service-hotel travelers (69%+) have stayed at an airport hotel.

A whopping 85 percent of respondents from China say they've stayed at an airport hotel when traveling for work or leisure, while in the other geographies surveyed at least 69 percent have stayed in airport hotels when traveling for work and at least 61 percent when traveling for leisure.

The majority of respondents stay in airport hotels for two reasons:

- 61%+ of all full-service-hotel travelers are more likely to stay **for business** than they are to stay for leisure.
- 68%+ would only consider staying at airport hotels **for missed or inconvenient flights.**

FIGURE 1

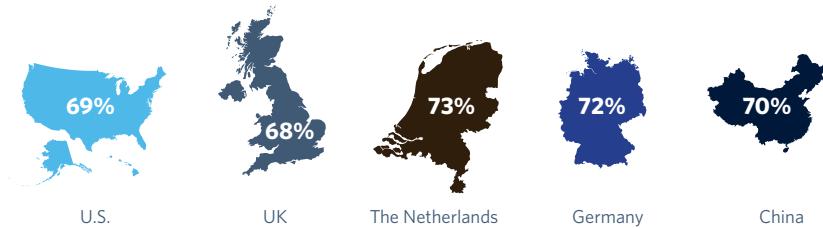


People are more likely to stay at airport hotels for business rather than leisure...





FIGURE 2

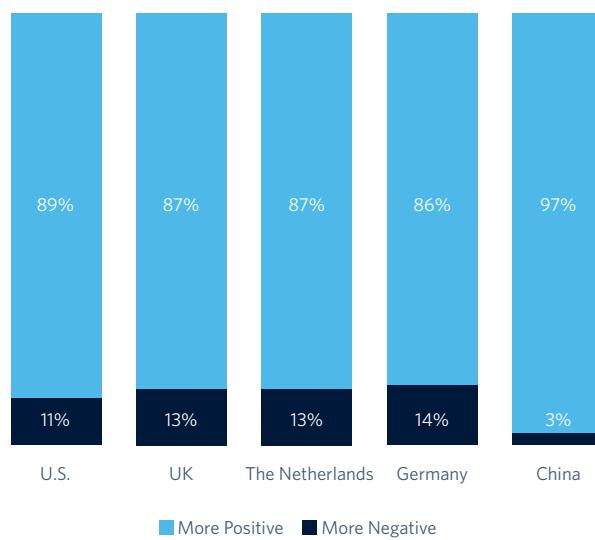


...or for missed or inconvenient flights.

Among all travelers, a huge majority who have stayed at airport hotels agree that their guest experience has impacted their overall view of the hotel chain itself.

FIGURE 3

A significant majority of travelers felt more positive about the hotel chain overall after staying at one of its airport hotels.



OPPORTUNITIES

- Because guests are likely to form their opinion of a hotel chain based, in part, on their experience at that chain's airport hotels, brands have an opportunity to increase positive feelings and brand loyalty by ensuring guest experiences at airport hotels will equal those experiences at the chain's other offerings.
- Given that nearly seven out of 10 travelers would only consider staying at airport hotels for missed or inconvenient flights, there is a large majority of travelers to be won over with new concepts, enhanced amenities and a better overall understanding of what next-generation airport hotels have to offer.

SECTION 3: FROM GOOD TO GREAT— WINNING BACK GUESTS AND ATTRACTING NEW ONES

After seeing the next generation of airport hotels, many who were previously unlikely to stay at an airport hotel are now likely.

The good: The vast majority of travelers across the five geographies surveyed are already more than satisfied with their airport hotel stays.

- U.S.: 90% are satisfied
- UK: 92% are satisfied
- The Netherlands: 90% are satisfied
- Germany: 90% are satisfied
- China: 96% are satisfied

For the most part, guests are satisfied with amenities at airport hotels. In the United States and the UK, more travelers rate amenities offered by airport hotels as “mid quality,” while in Germany, the Netherlands and China, more rate airport hotel amenities as “high quality.” Across the five geographies surveyed, far fewer rated airport hotel amenities as “top quality”—only 15 percent of those in China, 14 percent in the United States, 8 percent in the UK and 5 percent in both Germany and the Netherlands.

Getting to great: When asked to select phrases to describe an airport hotel, the number one perception across the five geographies—with the exception of Germany where it placed second—was “convenient.” Combined with the data that 61 percent of full-service-hotel travelers are more likely to stay at airport hotels for business than they are for leisure and 68 percent would only consider staying for a missed or inconvenient flight, this perception likely represents a very one dimensional view of the “convenience” that airport hotels truly offer.

When we look further at some negative descriptors of airport hotels, we also see a significant opportunity for a positive perception shift in the future. Among those who stayed at airport hotels but who do not intend to stay again, the most common words used to describe the hotels were “boring,” “expensive,” “outdated” and “crowded.” However, upon seeing images and concepts of next-generation airport hotels, perspectives of these travelers changed dramatically. Once they became familiar with the new hotel concepts, their perspectives evolved to “modern,” “luxurious” and “innovative,” indicative of an understanding of the multi-dimensional experiences that airport hotels now offer.



Hilton Frankfurt Airport, Germany



FIGURE 1

People who did not intend to stay at airport hotels again described them as "outdated," "expensive," "boring" and "crowded," but...

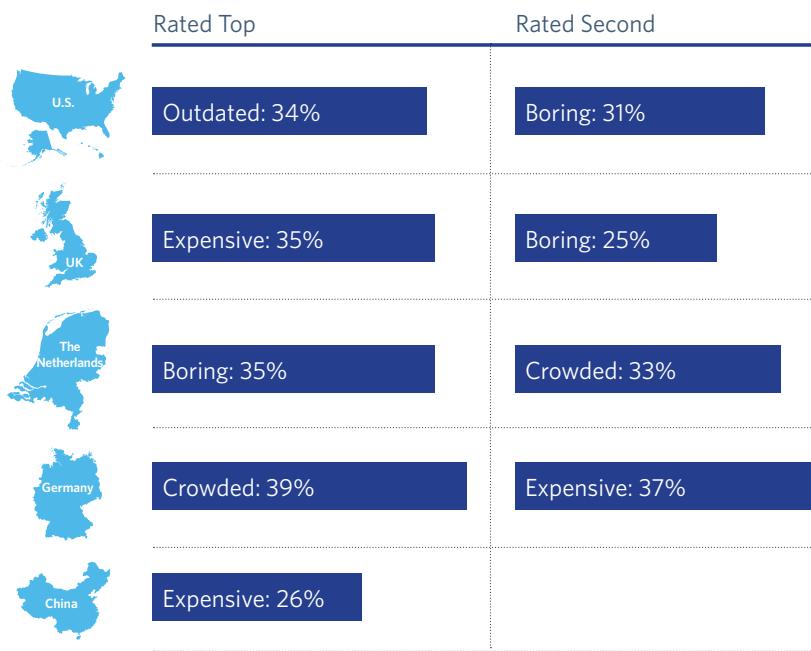
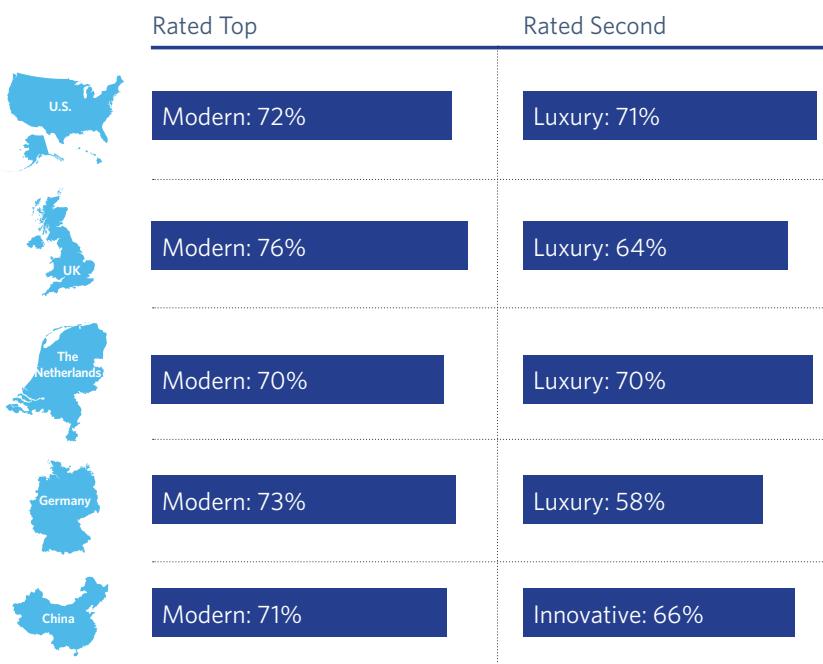


FIGURE 2

...after seeing photos of the new concepts for airport hotels, these same people described them as "modern," "luxurious" and "innovative."

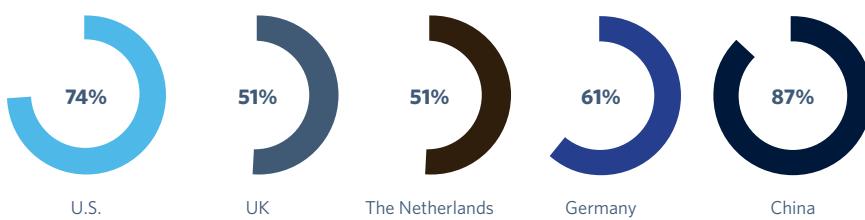


Nearly all travelers—ranging from 92 to 99 percent—indicated interest in at least some aspect of the airport hotel concepts.

For respondents across the five geographies surveyed, their greatest interests were new concepts for guest rooms, while in three of the geographies (China, the U.S. and the Netherlands), the least interest was in the new concepts for the building exterior. But even the amenities that garnered the least interest were still of interest to a strong majority of respondents, with no fewer than 64 percent of people interested in all five categories of new concept photos (exterior, lobby, food/banquet facilities, rooms and spa & wellness).

Among those who said they were unlikely to stay in an airport hotel, not only did their descriptions shift from highly negative to highly positive after seeing the concepts, but, for more than half of them, so did the likelihood that they would stay at an airport hotel again. The largest turnarounds were in the U.S. (74%) and China (87%).

FIGURE 3



After seeing the next generation of airport hotels, many who were previously unlikely to stay at an airport hotel (33% of all respondents across the five geographies surveyed) are now more likely to choose an airport hotel.

OPPORTUNITIES

- Negativity about airport hotels is driven by those who have not seen new-concept, next-generation airport hotels. So even among this group, which claims to not want to stay in airport hotels, there is room to change minds and make airport hotels more relevant to their lives.
- Expectations and satisfaction are driven by the two primary reasons people stay at airport hotels. In other words, do they satisfy me when my flight is late or inconvenient, and do they satisfy me when I travel for business? Now it's up to airport hotels to offer amenities and services that will make guests want to respond "yes" to both questions.



Hilton Copenhagen Airport, Denmark



SECTION 4: A SNAPSHOT IN TIME: WHERE THE INDUSTRY IS, WHERE THE INDUSTRY IS GOING

Respondents from China did not identify any amenities as “exciters,” while those from the U.S. did not identify any amenities as “table stakes.”

To begin to see where the hotel industry is moving, we asked survey respondents about amenities potentially offered by airport hotels and the impact they would have on their experience. Based on their answers, we utilized the theory of product development set forth by Professor Noriaki Kano to divide their responses into three categories:

- Table stakes: Amenities that people rate as so obviously expected that their existence has little impact on their guest experience, though their absence would have a negative impact
- Satisfiers: Amenities that are not expected but that, if present, still increase satisfaction and may be a deciding factor in a booking decision
- Exciters: Amenities that are unexpected and provide increased value when present and, in turn, have a higher impact on guest satisfaction

Based on this model, we not only are able to see what potential impact including certain amenities could have on guests, but can also start to monitor where each market should be focusing on in the immediacy and for the future. Typically, what today is an exciter (something unexpected) may evolve over time to be a satisfier and, eventually, table stakes. Think Wi-Fi or 24-hour room service. At one point these were innovations, pleasant surprises for guests that added to their satisfaction. Today, for the most part, guests expect these features and are not necessarily impacted by their presence, though they might be by their absence.

Respondents across the five geographies had very different perspectives about which amenities were table stakes, satisfiers and excitors. In a way, China, with no excitors, and the U.S., with no table stakes, are bookends of this continuum from exciter to satisfier to table stakes.

For instance, six amenities that are considered table stakes to Chinese respondents are excitors to those from the U.S. In other words, the Chinese wouldn't even notice if these amenities were there (they might not even categorize them as amenities), though they would notice their absence. The Americans, however, wouldn't even expect them in the first place and, if they were there, they would make a big impact.

These six are:



Drink or snack upon arrival



Mobile app that allows you to order room service



Direct-to-airport luggage transfer



In-room spa amenities



4K television

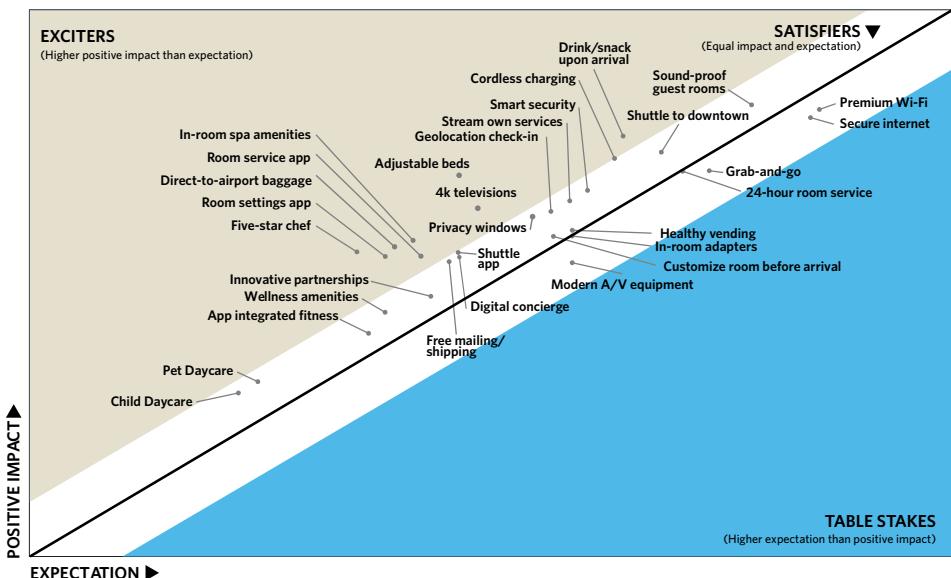


Mobile app that allows you to control your room settings

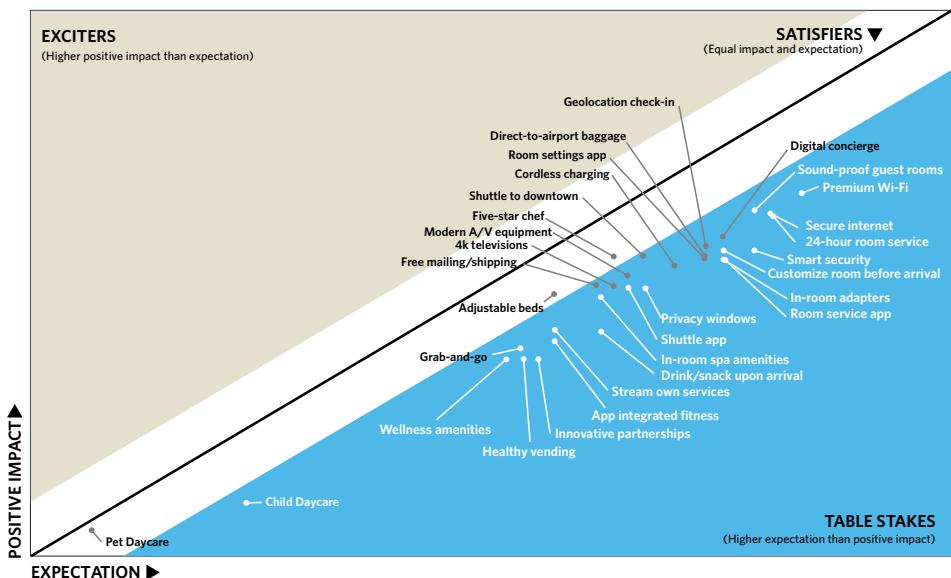
Twenty-two additional amenities—including premium Wi-Fi, soundproof guest rooms, child daycare and smart security—are satisfiers in the U.S. today. These same 22, however, are table stakes among the Chinese.



While the U.S. has many excitors, it has no table stakes; though many satisfiers are in between. This suggests that over time today's excitors may become tomorrow's satisfiers, which in turn may become table stakes in the future, an indication where the industry and guest preferences are heading.



With numerous table stakes and no excitors, China may reflect the future best, with hotels that already offer so many of these amenities that guests have come to expect them.



**Hilton Mumbai International Airport,
India**



Hilton Madrid Airport, Spain

The chart below showcases the "exciters" in each market, those amenities that are unexpected and provide increased value when present. Almost all countries were interested in direct-to-airport luggage transfer, 4K televisions and five-star chefs on site, although China considered most amenities to be table stakes.

AMENITY CONCEPT EXCITEMENT



- Drinks/snack upon arrival
- 4K televisions
- Adjustable beds
- In-room spa amenities
- Mobile app to order room service
- Direct-to-airport luggage transfer
- Mobile app to adjust room settings
- Five-star chef



- Shuttle to downtown
- Adjustable beds
- Five-star chef
- 4K televisions
- Direct-to-airport luggage transfer
- In-room spa amenities
- Mobile app to adjust room settings



- 4K televisions
- Direct-to-airport luggage transfer
- In-room spa amenities
- Five-star chef



- Direct-to-airport luggage transfer
- 4K televisions
- Five-star chef



- None

OPPORTUNITIES

- By understanding what amenities in specific geographies are exciters and satisfiers, both of which have a higher positive impact on guest satisfaction, hotels can emphasize their inclusion in the guest experience to build loyalty and attract new customers.
- Information that shows what amenities are excitors today offers insights into what, down the road, will become satisfiers and, eventually, possibly even table stakes.



APPENDIX: OUR NEW HILTON AMSTERDAM AIRPORT SCHIPHOL IS LEADING THE WAY

With a fresh and forward-thinking approach, Hilton Amsterdam Airport Schiphol challenges current expectations of airport hotels.

Not only is it the perfect hub to connect travelers to Amsterdam and more than 300 world destinations, but its unique concept delivers more than guests expect on the inside, too. Providing guests with space and light in abundance, and an inspiring, flexible environment, Hilton Amsterdam Airport Schiphol is full of memorable design touches, convenient features, innovative technology and contemporary bars and restaurants.

Less than a 10 minute walk from the main terminal through a covered walkway directly connected to the international terminal, or a short ride on the courtesy bus, the hotel is the largest conference hotel near Amsterdam Airport Schiphol. It boasts 23 flexible meeting spaces, including a ballroom with a capacity of up to 640 attendees, making it the perfect location for events and meetings of many sizes.

Designed by acclaimed Dutch architects Mecanoo, alongside British interior design company The Gallery HBA, Hilton Amsterdam Airport Schiphol stands out from its surroundings with its cubic design, round edges and eye-catching facade. The twist of the building matches the curve of the bordering highway, which integrates the building in the environment.

The final touch is given by the random arrangement of 5,500 diamond-shaped panels that add to the building's distinctive appearance. Every bedroom on the outer bay of the building has at least two of these windows, which frame the spectacular view over the Dutch landscape.

Contemporary Dutch influence can be found throughout the public space and guest rooms. The architects designed the main atrium to be the heart of the hotel and meeting area by creating an open layout with a 42-meter-high glass roof, which provides the space with natural daylight. This open layout showcases Hilton's new lobby concept, which brings together, in a single open-plan area, unique "islands" that serve as multifunctional spaces, including a reception area, lounge and bar.

Dutch heritage also provided the inspiration for the food and beverage concepts at the hotel. In the Axis lobby and cocktail bar, guests can choose from a large selection of gins and jenevers, the national drink of the Netherlands from which gin itself evolved. The Bowery Restaurant features three live cooking stations and offers authentic Western grill dishes and Asian specialties made with fresh ingredients sourced from local suppliers and farmers. The Vine Room serves as a private, intimate event space allowing guests to enjoy exclusive moments.

Finally, Hilton Amsterdam Airport Schiphol features Western Europe's first eforea spa, which offers experiences that pay homage to wellness practices from Europe, Asia, the Pacific, Middle East, Africa and the Americas, ensuring a truly global experience for the hotel's global guests.



Hilton Amsterdam Airport Schiphol

FAST FACTS



Designed by Dutch architects Mecanoo and British interior design company The Gallery HBA



433 rooms, including 12 suites with a separate living room and extensive work area and 96 executive rooms that allow guests access to the executive lounge



Each guest room includes soundproof windows, a Hilton Serenity bed, 40-inch TV, mini-fridge, and coffeemaker



On-site eforea spa and fitness center are open 24 hours a day, 7 days a week



23 meeting spaces, including a ballroom with a capacity of 640 attendees



3 restaurants: The Axis gin bar, Bowery Restaurant ("where the Netherlands and Asia melt together") and the Vine Room for private events



Downtown Amsterdam and attractions like the Van Gogh Museum, Anne Frank House and Rijksmuseum are just 15 minutes away

ABOUT HILTON WORLDWIDE AIRPORT HOTELS

Since opening the first airport hotel in San Francisco in 1959, the sky has been the limit for Hilton Worldwide in the airport hotel sector. Today, Hilton offers over 380 airport hotels around the world—more than any other hotel company globally—and proudly carries on Conrad Hilton's legacy as the pioneer of this hotel category by opening airport hotels that not only serve business travelers with outstanding business and meeting facilities, but also leisure guests with elevated design and sophisticated amenities.

QUICK FACTS:

Hilton Worldwide Airport Hotels:

- 383 properties worldwide
(60 Hilton Hotels & Resorts properties)
- 27 countries across 5 continents
- 75,000+ rooms worldwide

Hilton Hotels & Resorts:

- 560+ properties worldwide
- 85 countries across six continents
- 203,800+ rooms

HILTON WORLDWIDE AIRPORT HOTELS GEOGRAPHIC BREAKDOWN:



CONTINUED EXPANSION:

Hilton Hotels & Resorts' airport footprint is continuing to grow. The following properties have either opened recently or are in the opening pipeline:

- Hilton Munich Airport (Germany) – Q1 2015
- Hilton Batumi (Georgia) – Q2 2015
- Hilton Tokyo Odaiba (Japan) – Q4 2015
- Hilton Amsterdam Airport Schiphol (The Netherlands) – Q4 2015
- Hilton Ankara Airport (Turkey) – Q3 2017
- Hilton Raleigh-Durham Airport/Brier Creek (United States) – Q3 2018

DID YOU KNOW...

- Hilton Chicago O'Hare Airport is the only hotel directly connected to Chicago O'Hare International Airport and offers day rates for travelers to get in a workout at the fitness center or relax in-room between flights.
- Hilton opened its first airport hotel overseas with Hilton Paris Orly Airport in October 1965.
- With 1,234 rooms, Hilton Los Angeles Airport has the largest room inventory of all Hilton airport hotels.
- Guests at Hilton Tokyo Odaiba can enjoy free daily shuttle service not only to Haneda Airport, but also to Tokyo Disneyland.
- There are five airport hotels serving the London metro area: Hilton London Heathrow Airport, Hilton London Heathrow Airport Terminal 5, Hilton London Gatwick Airport, Hilton London Syon Park and Hilton London Stansted Airport.
- Hilton Miami Airport, a top 20-rated Miami hotel, is located alongside a 100-acre natural lake and features a jogging trail, outdoor pool and tennis and basketball courts.
- Hilton Munich Airport has created its own beer mug that it distributes to guests in October to celebrate Oktoberfest.
- Guests at Hilton Boston Logan Airport can take a leisurely 10-minute water taxi ride to Boston's Seaport District to enjoy great dining options, the Institute of Contemporary Art, Blue Hills Bank Pavilion and tours at the local Harpoon Brewery.
- The World Travel Awards named Hilton Frankfurt Airport Europe's Leading Airport Hotel of 2014.

ACKNOWLEDGMENTS

RESEARCH SOURCES:

Quantitative Consumer Survey
November 2015

5,606 respondents from the U.S., UK, Germany, the Netherlands and China
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