GO TECHNOLOGY

Insight by Zonal, Powered by CGA by NIQ

Hotels and consumers: Guest expectations and how to meet them

Exclusive Zonal and CGA by NIQ insights into consumers' engagement and the role of technology in British hotels

Zonal

CGA Powered by NIQ

GO Technology Report, March 2025

Consumers and hotels: Ten Key numbers

78%

Of consumers visited **a UK hotel in 2024**

53%

Stayed in a budget hotel chain—**the top accommodation type**

45%

Visited hotels for a weekend break—**the top occasion**

22%

Of 18 to 34 year-olds **visited a UK hotel at least weekly**

88%

Are likely to **look at a hotel's reviews** before booking

35%

Use recommendations from friends and family to find hotels

47%

Usually **check a hotel's social media pages** before booking

52%

Will switch from their preferred hotel brand **if they get a better offer**

49%

Have used **automated check-in** in the last year

72%

Are likely to **eat in a hotel's restaurant** while staying

Hotel usage: Five top trends

People's engagement with hotels is evolving. Our GO Technology research reveals five of the biggest developments

1. Domestic visits rising

Our survey shows UK hotel usage is increasing, and nearly four in five **(78%)** consumers visited or stayed in one in 2024. A quarter **(25%)** said they had used hotels more often than last year, while only **16%** reduced their visits and stays. The sharpest rise has been among those who use hotels only occasionally, but there has been an uptick in frequent visitors too. Those visiting weekly rose from **8%** in our last survey to **10%**.

2. Young adults lead the loyal core

Younger adults are much more regular users of hotels than older consumers. More than a fifth **(22%)** of 18 to 34 year-olds visited or stayed in a hotel at least weekly in 2024, compared to just **2%** of those aged 55 or over. Two in five **(39%)** went more often year-on-year—more than double the figure of **16%** in the 55+ group.

3. Three in four stay abroad

There has also been an upswing in overseas hotel stays. Over three quarters **(76%)** of consumers stayed in a hotel abroad in 2024—11 percentage points more than at the time of our last survey. Two thirds **(67%)** say they are likely to do so in 2025, rising to **71%** of those aged 18 to 34.

4. Costs still biting

While usage is rising, the expense of travel continues to keep some people at home. Half **(50%)** of those who reduced their UK hotel visits said it was because of cost of living increases, and **34%** cited less disposable income. More encouragingly, the number affected by the cost of living fell by **8 percentage points** from our last survey.

5. Price and location the main attraction

Focus on cost makes price an important factor in consumers' hotel choices. Three in five **(60%)** think about it, though this is 6 percentage points down from the last survey—while **31%** look for offers and discounts. But location is just as crucial a factor, and **60%** of guests consider it before choosing.

78%

Our survey shows UK hotel usage is increasing, and nearly four in five consumers visited or stayed in one in 2024

Why visit?

Why do people visit hotels? Our research shows weekend breaks are the top reason, while growth in holidays is an encouraging sign that guests are staying longer. But it's about much more than accommodation: spas, food, drink, function areas are big draws too.

Top ten occasions for visiting (percentage using for that reason in 2024, followed by percentage points change from last survey)

1. **Weekend break** 45% (-3 pp)
2. **Holiday** 36% (+5 pp)
3. **Visit friends or family** 29% (no figure in last survey)
4. **Celebration or function** 18% (-1 pp)
5=. **Day trip** 17% (no change)
5=. **Spa / leisure facilities** 17% (+3 pp)
7. **Work / business** 16% (+2 pp)
8. **Stop-off on long journey** 15% (+1 pp)
9. **Meal** 14% (no change)
10. **Conference / meeting** 12% (+3 pp)

Top types of accommodation

Budget hotels remain Britain's most popular type of accommodation. But rented apartments saw the biggest uplift in usage in 2024 and are a popular alternative—especially among younger adults. Leisure and business hotels also had a slight uptick.

Top types of accommodation (percentage of consumers using in 2024, followed by percentage point change from last survey; respondents could choose more than one option)

1. **Budget hotel chain** 53% (-3 pp)
2. **Rented apartment (eg Airbnb)** 26% (+5 pp)
3. **Leisure (eg spa, health)** 25% (+1 pp)
4=. **Business** 21% (+1 pp)
4=. **B&B** 21% (no figure in last survey)
6=. **Boutique** 22% (+2 pp)
6=. **Pub with rooms** 22% (+3 pp)
8. **Luxury (wedding or events)** 16% (+1 pp)

Reviews, word of mouth and bookings

While price, location and fundamentals like service are still the most popular factors in hotel choice, reviews have changed consumers' discovery journeys. Around nine in ten **(88%)** consumers say they are likely to look at a hotel's reviews before booking, and nearly all are either definitely **(51%)** or somewhat **(46%)** influenced by them. Delivering on the fundamentals of hotel stays, like price, location and service, are key to optimising these guest ratings.

Where do people turn for these reviews? More than two in five search on Google **(44%)** or TripAdvisor **(43%)**, making them the top two platforms for encouraging guest reviews and ratings. Third-party booking apps **(38%)** and other online review sites **(37%)** are the next most popular destinations.

Word of mouth is another big source of discovery. More than a third **(35%)** of consumers say they use recommendations from friends and family to find hotels—up by 3 percentage points year-on-year.

When it comes to booking, three in five **(61%)** consumers go direct to a hotel's own website. But external sites **(52%)** aren't far behind, with Booking.com, TripAdvisor, Hotels.com, Trivago and Expedia the top five third-party destinations. Some like to use hotels' apps **(30%)** or call **(26%)** or email **(18%)** a hotel direct—a reminder of the importance of making reservations simple and seamless across all booking channels.

The power of social

Like review sites, social media platforms are an increasingly important qualification tool in consumers' booking journeys. Nearly half **(47%)** of consumers now usually check a hotel's social media pages before booking—5 percentage points more than a year ago. The number soars to **63%** among 18 to 34 year-olds.

Instagram, TikTok and Facebook have emerged as the big three social sources. Two thirds **(67%)** of 18 to 34 year-olds say they are likely to visit Instagram before visiting a hotel, and nearly as many use TikTok **(64%)** and Facebook **(57%)**. Among older consumers, it's Facebook that ranks highest.

The value of loyalty

With so much choice and so many sources of discovery, hotels have to work hard to earn their guests' loyalty. Only **23%** say they are very loyal to their favourite hotel brand and will choose it when they can. Just over half **(52%)** will switch from their preferred brand if they get a better offer, and **24%** will change their brand every time.

Loyalty programmes can help to encourage repeat visits, and around a third **(32%)** of consumers are part of at least one—rising to **39%** of 18 to 34 year-olds. Points programmes, discounts, room upgrades and perks like free wi fi and snacks are among the most popular elements of these schemes. Personalised service like room requests is also attractive: **34%** already get this, and **49%** would like to have it.

Hotel tech: Five innovations

What will hotels of the future look like? Here are five of the top technologies that many consumers think will become standard in the future

1. Automated check-in (but only with human back-up)

Consumers increasingly expect to see automation at the check-in and check-out stages. Just under half (49%) have used it in the last year. But it's crucial that this tech works. Failed automation is a big frustration, and it's compounded when staff aren't on hand to fix it. And while 63% of 18 to 34 year-olds say they prefer an automated check-out, only 21% of those aged 55+ do so—making it important to offer human interaction too.

2. Room keys on your phone

Nearly half (47%) of consumers expect to see mobile-based digital keys in hotels of the future, and the number has risen 5 percentage points in just 12 months. With younger adults in particular wanting functions and services consolidated on their phones, we can expect this form of room access to become widespread. Meanwhile nearly a third (31%) expect to see biometric keys, activated by methods like fingerprint scans.

3. App-based services

There's a keen appetite for technology that makes simple hotel tasks as efficient as possible. More than two thirds (70%) of consumers are attracted by a solution for functions like ordering more towels, and nearly as many (65%) would like a tablet or device for controlling in-room facilities. App-based room service is also attractive.

4. Local guides for today's tourists

Providing guides to local areas can be a good way for hotels to add value to guests' stays. Around two thirds (68%) of consumers are attracted by the concept of a mobile-based solution showing what's on or what to see in their hotel's city. Deals or discounts on local activities can also appeal.

5. AI

Artificial Intelligence has the potential to change many aspects of the hotel experience. Nearly half (45%) of consumers agree they are excited about AI and think it could improve their stays. As with most aspects of tech, younger adults are much more positive about AI than older ones—though some older guests are yet to be convinced.

47%

Nearly half of consumers expect to see mobile-based digital keys in hotels of the future

The human touch

Many consumers like the idea of technology leading their hotel experience—but only if it's made easy for them. Nearly half **(48%)** say they are likely to stay in a smart hotel, where everything can be done digitally without any human assistance, and this figure is up by 2 percentage points year-on-year. But others are resistant. More than a quarter **(28%)**—and nearly half **(47%)** of those aged 55 or over—are unlikely to stay in one.

This is usually because they prefer the personal touch. The large majority **(85%)** of those who won't stay in a smart hotel say it's because they like human interaction. Some also worry that staff-free hotels will be less safe or efficient, and there is a heavy preference for human intervention on things like room or maintenance requests and ordering food.

A bleisure boom?

With well over half **(57%)** of monthly hotel guests working during their stay, supporting facilities are crucial. Wi-Fi and tech can help, but the working environment is just as important.

1. **Weekend break 45% (-3 pp)**
2. **Holiday 36% (+5 pp)**
3. **Visit friends or family 29% (no figure in last survey)**
4. **Celebration or function 18% (-1 pp)**

5=. **Day trip 17% (no change)**

The food and drink opportunity

Restaurants and bars are a big part of hotels' sales, but they have big rivals in external venues and delivery platforms. Nearly three quarters (72%) of consumers say they are likely to eat in the restaurant while staying, and 40% are likely to order room service. However, half (50%) are also likely to order food from outside or eat out.

This is partly influenced by the variety and competitive offerings available from external venues nearby, which often provide additional choices for guests. While 86% of guests say they are satisfied with their last visit, significantly fewer have been happy with the quality (71%) and variety (68%) of the food and drink. When it comes to room service, frustrations include expense (35%), a limited choice (26%), food arriving cold (25%) and being left with dirty plates (23%).

But there are ways to win guests round. Sizeable numbers say discounts appeal (46%), and easily found online menus (43%) and positive reviews (38%) would encourage them to pre-book a restaurant meal while staying at a hotel.

Hotel bugbears

Top ten reasons for dissatisfaction on last hotel visit (percentage of guests citing)

1=. **Poor cleanliness (30%)**
1=. **Unresponsive staff (30%)**
3. **Lack of entertainment / things to do (26%)**
4=. **Lack of amenities (25%)**
4=. **Poor service (25%)**
6. **Poor quality of food / drink (21%)**
7=. **Parking availability / cost (20%)**
7=. **Key card not working (20%)**
9=. **Poor location (19%)**
9=. **Expensive (19%)**

86%

of guests say they are satisfied with their last visit, significantly fewer have been happy with the quality (71%) and variety (68%) of the food and drink.

The view from CGA

"Our GO Technology research reveals some very encouraging trends for hotel operators and their partners. Usage has increased, satisfaction is generally high, and heavy engagement from younger adults is a good sign for the future. However, with business costs high and key inputs like labour and energy set to rise further, margins will be under pressure in 2025. Hotels will need to stay sharply focused on value and executing the fundamentals consistently well. Consumers are clear that technology can help, by making experiences more efficient and convenient—but it's also vital to avoid neglecting the areas where human responses are more effective, and meeting the needs of guests who still prefer the personal touch."

Karl Chessell, business unit director - hospitality operators and food, EMEA, CGA by NIQ

The view from Zonal

"Despite a challenging market, our research shows that there are clear opportunities for operators to capitalise on, particularly in areas like F&B, where revenue potential remains strong. With so many external dining options and delivery services available, hotels need to step up their game to capture more of their guests' spending.

"F&B can play a big role in boosting revenue, especially as it helps balance out pressures on room rates and rising costs. By enhancing the quality, variety, and convenience of their dining options—whether in the restaurant or via room service—hotels can better meet guest expectations and encourage repeat visits. Simple things like easy online booking and positive reviews can make a big difference in driving more pre-booked meals. At a time when margins are tight, focusing on F&B is a great way for hotels to stay competitive and keep their bottom lines healthy."

Tim Chapman, Chief Commercial Officer, Zonal

About the report

This report is based on figures from Zonal and CGA's exclusive GO Technology survey of 3,300 nationally representative British consumers in January 2025.

For more information about the research, please contact info@zonal.co.uk