

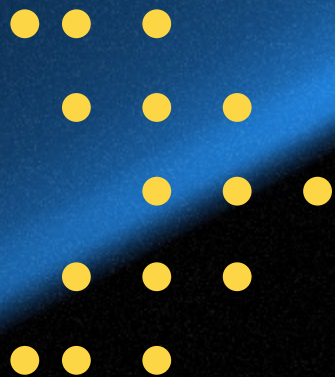
MUST-SEE LIVE TV:

INSIDE HOTEL GUESTS' ENTERTAINMENT HABITS

DIRECTV
HOSPITALITY

 **HOTEL DIVE**

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After a long day at a business conference or navigating a city's attractions, hotel guests are looking for an easy experience to unwind. Television, specifically live programming, is the best solution for individuals tired of staring at their mobile devices and unwilling to combat unreliable internet service that disrupts streaming services and efforts to cast video.

DIRECTV HOSPITALITY partnered with Hub Entertainment Research to study the habits of hotel guests. As this report will detail, televisions remain a top priority for travelers. Notably, live programming is viewed as the most reliable form of entertainment when on the road – a significantly different behavior from home-viewing habits, which tend to rely on streaming services.

Not only is television the preferred entertainment option in hotel rooms, it is viewed as essential. DIRECTV research shows guests will make lodging decisions based on the size of the TV. In fact, a majority of business and leisure travelers will pay more for a better product.

“This is great news as it means that all hotels providing live TV to their guests have the largest component of their in-room entertainment strategy already deployed today,” said Kimberly Twiggs, Associate Vice President of Market Development for DIRECTV HOSPITALITY. “Adding more streaming, casting, and on-demand options will only further enhance the entertainment value proposition for guests.”

Read on to learn more about why television remains a vital selling point for hotel guests.

TRAVEL BOUNCES BACK

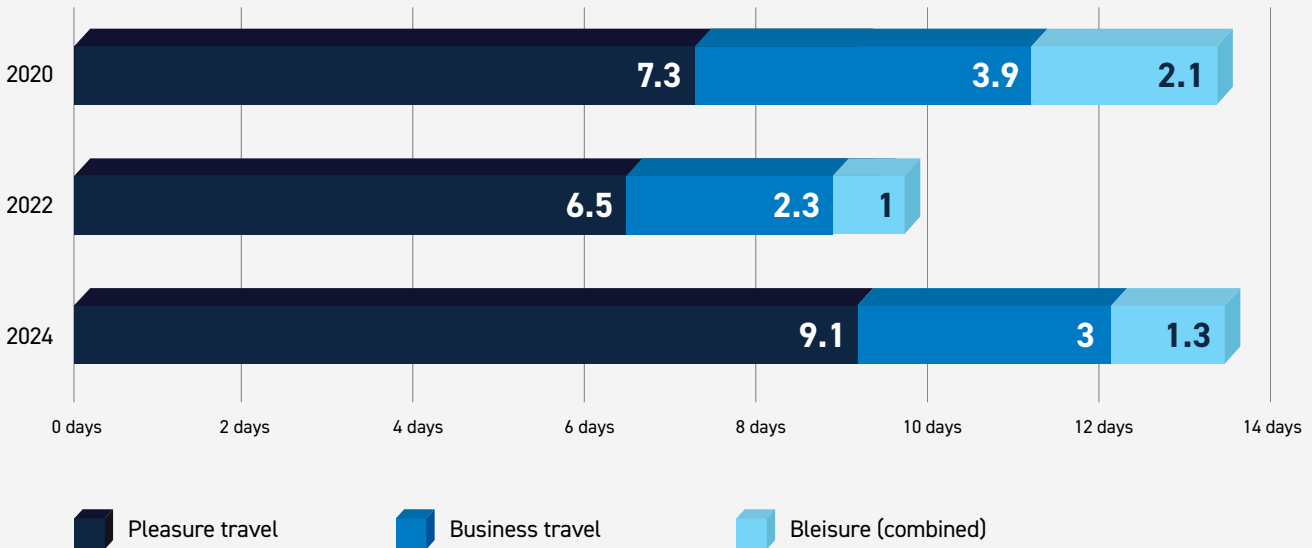
DIRECTV HOSPITALITY commissioned a third-party custom research study surveying 1,200 individuals – aged 21 and older, who have spent at least five nights in a hotel within the past year – to investigate customer preferences. Travelers included business guests, leisure travelers and loyalty members. This is the third iteration of the study, with similar versions conducted in both 2020 and 2022.

Respondents spent an average of 13.4 nights in hotel rooms in the past year, a significant increase from 9.8 in 2022, when COVID curbed travel patterns. In an

encouraging sign for the hospitality industry, the nights spent in a hotel now are slightly higher than the study found in 2020. Pleasure travel noticeably increased 25% from 2020 and 40% from 2022. Meanwhile, business travel decreased by 23% from 2020 but grew 30% from 2022.

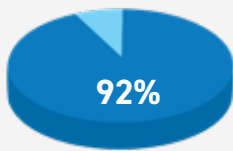
These results show Americans have essentially returned to their same travel habits as before the pandemic. The extended time on the road places a greater onus on hotels to match or exceed expectations regarding the guest room experience.

TRAVEL PATTERNS

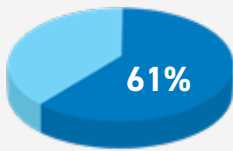


| WHAT'S ON TV?

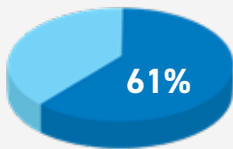
While hotels have made conscientious efforts to offer amenities targeting lifestyle travelers who favor health and wellness (spas, fitness centers, etc.) television remains of utmost importance. In effect, it is a clear differentiator for travelers when selecting lodging.



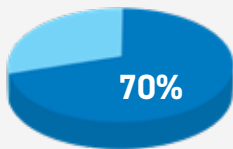
of respondents described television as "important" for their in-room experience



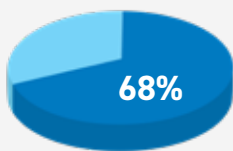
of leisure travelers with children would **pay more** for easy access to local, live and on-demand TV and music.



of business travelers would also **pay more** for access to those same features



of leisure travelers with children say they would **switch hotels** for easy access to local, live and on-demand TV and music



of business travelers would also **switch hotels** to gain access to those same features

In the "Guest Media Research" survey, 92% of respondents described television as "important" for their in-room experience. Not only do travelers want the option to turn the TV on, they are using it frequently: Nearly half of respondents would be considered heavy TV watchers, with the television on at least 75% of their time in the room.

ALL ACCESS

For many travelers, it isn't good enough to simply have a television inside the room. The "Guest Media Research" survey found both 61% of business and leisure travelers with children would pay more for easy access to local, live and on-demand TV and music. Also, 68% of business travelers and 70% of leisure travelers with children say they would switch preferred hotel brands to gain access to those same features.

The story is slightly different, but just as significant when looking at loyalty club members. Forty-five percent indicated they would pay more for access to local, live and on-demand TV and music. Perhaps even more noticeably, loyalty club members aren't as inelastic as their name implies, as the majority (58%) said they would switch hotels to gain access to local, live and on-demand TV and music.

"Since guests want to match the same experience they have at home, it's important that hoteliers offer a robust in-room guest entertainment offering to help meet high guest expectations," Twigg said.

| THE BIG PICTURE

At this point, it is clear the TV is a crucial part of the guest experience. A look into consumer behavior can provide some insights as to why.

Above all else, travelers are looking for an easy way to relax after a long day of exploring a city or taking business meetings. TV programming is also a popular choice during a relaxing day – whether that be a break in the action on a busy trip or when riding out inclement weather.

Where hotel viewing habits differ from home viewing is streaming consumption. Seventy-seven percent of respondents say they watch streaming services at home at least a few times per week. “The data specifically checks for guest preference, not guest experience – and guests overwhelmingly prefer live, linear TV in the hotel room despite being more likely to use streaming services at home,” Twiggs said.

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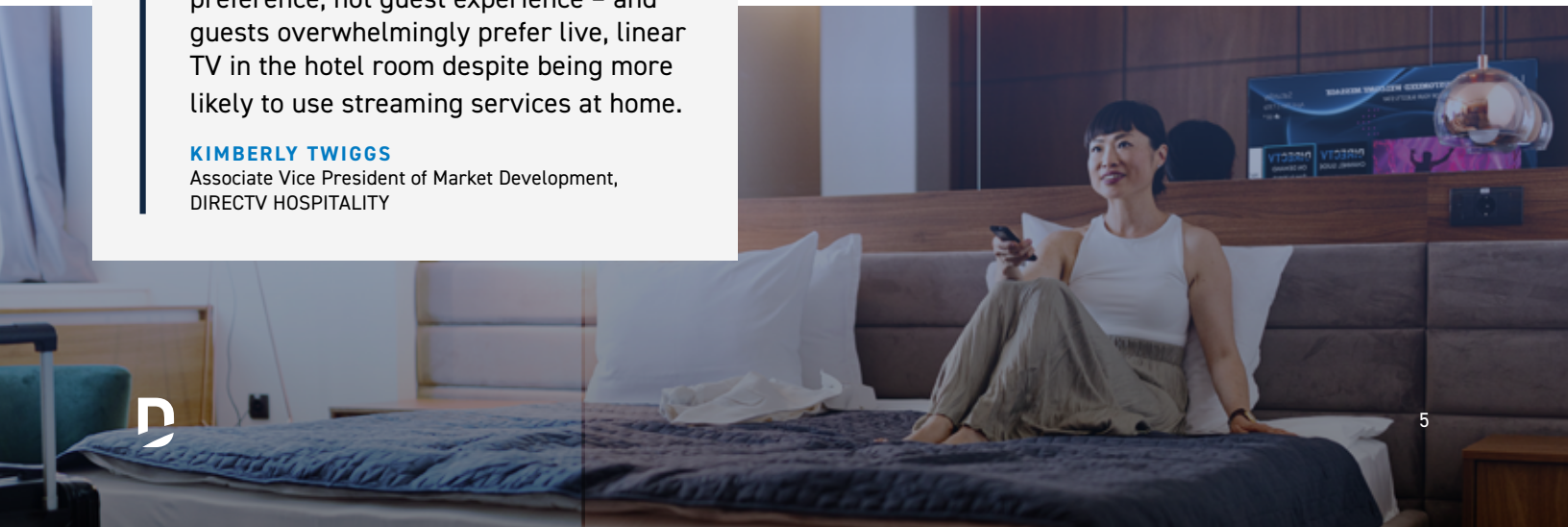
KIMBERLY TWIGGS

Associate Vice President of Market Development,
DIRECTV HOSPITALITY

Considerations as to why guests prefer consuming live TV over streaming in the guest room can include struggles to remember log-in credentials and subscription rules limiting the number of devices allowed per account. Past frustrations on trips certainly play a factor. Sixty-eight percent of survey respondents said they regularly have difficulty logging into their accounts on hotel TVs. Weak internet is also a regular complaint among hotel guests.

Casting – playing content from a mobile device on televisions – would be a popular option, but technology does not seem ready to meet the demand. The study shows 63% of guests regularly attempt to cast, but 58% of those casters say they have problems casting to the hotel room TV. Not surprisingly, 82% of individuals described their casting efforts as frustrating.

As a result, access to broadcast network TV channels is the most important priority (81%) among TV watchers, slightly more than cable channels and 15% more than premium networks.



| GAME ON



“Must-see TV” used to be attached to sitcoms and scripted dramas in the 1990s. But today, live sports reign supreme.

A sizable group (49%) of pleasure travelers and business travelers (63%) turn to sports for entertainment. The general public has demonstrated that the experience of catching a game can't be duplicated by watching on tape delay or reading about it the next day. The viewing numbers speak for themselves.

According to Nielsen's annual ratings, the NFL scored the 14 highest-rated programs in 2023 and 19 of the top 20 shows – only the Academy Awards broke through. Ten “Thursday Night Football” broadcasts were among the 50 most-viewed telecasts – an important statistic given hotel occupancy is higher during the week than on weekends. Access to such broadcasts reaches across consumer groups as Thursdays often overlap with many business conferences and the beginning of leisure travel for those individuals trying to beat weekend crowds.

The demand for live TV in this scenario is intuitive. Sports are played at a certain time and – particularly in important or hyped games – the fear of missing out (FOMO) drives the impetus to watch in the moment. Streaming programming lacks urgency by definition. It is on-demand content for a convenient time.

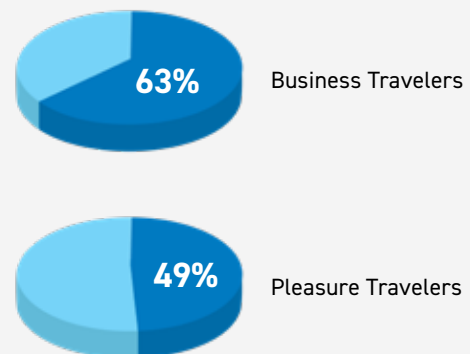
FUN FOR ALL

While a love of sports and singing contests often associated with live programming is not universal, it tends to avail itself to multiple generations of family members or a large group of co-workers more than a gritty drama. It becomes a shared experience.

The “Guest Media Research” survey shows guests will use their own devices to access social media, play games or stream music. Live television watching is reserved for the hotel's TV screen by 82% of respondents.

“Entertainment is a bonding experience – not just for families – and if there's a shared interest in a singing competition show or sports program, entertainment has the power to bring people together,” Twigg said.

PERCENT OF TRAVELERS WHO TURN TO SPORTS FOR ENTERTAINMENT





In a crowded market, hotels and services must pay attention to TV habits and adapt to coming trends.

“With DIRECTV HOSPITALITY, not only do we see these patterns emerging, but we act on them,” Twiggs said. “We continually aim to enhance guest satisfaction while setting new standards for in-room hotel entertainment by diversifying our content as often as possible.”

Until technology like Wi-Fi matches what hotel guests are accustomed to at home, consumers are going to turn to live TV because it is more reliable and easier to access. Hotels on the fence about keeping TVs in rooms should hold off on ditching the screen for the next several years or risk backlash from guests, as those guests want to make choices based on their preferences instead of compensating for what they perceive to be deficiencies.

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However, while travelers want a high-quality TV in their rooms, that shouldn't come at the expense of other amenities individuals take for granted. Guests want to be able to choose their entertainment based on their preferences – not based on what technology works in the hotel room.

“Guests crave the choice of either watching live TV or having the option to stream their own content because it allows them to conduct their stay on their terms – it's personalized, choice-driven and creates a home-like environment in the guest space,” said Twiggs. “This means a one-size-fits-all approach on the guest experience isn't going to work anymore.”



DIRECTV HOSPITALITY

DIRECTV is the ultimate entertainment solution for hotels nationwide, offering customizable, scalable solutions for any size property. For more information, contact DIRECTV HOSPITALITY at 1.844.955.2052 or visit directv.com/hotels.

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Source: HUB Entertainment "Guest Media Research" Survey conducted April 2024 with 1,200 U.S. consumers 21+ who stayed five or more nights in hotels within the past 12 months. ©2024 DIRECTV. DIRECTV and all other DIRECTV marks are trademarks of DIRECTV, LLC. All other marks are the property of their respective owners.

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