

**CONVERSATIONAL RELEVANCE™**

**THINGS THAT DRIVE CONVERSATION AND  
CHOICE OF HOTELS**

March 2013



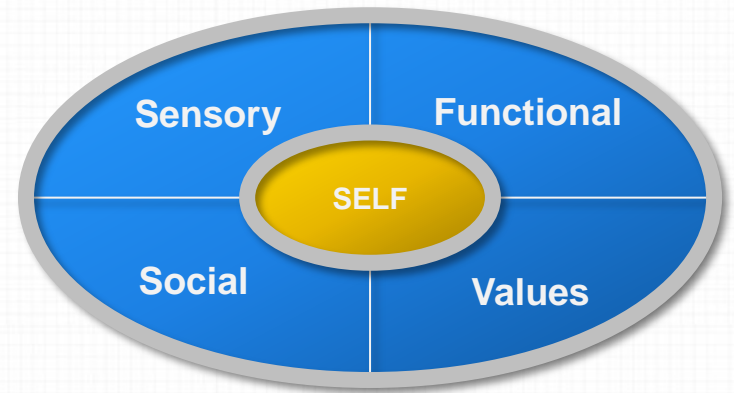
# BACKGROUND

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- The MavenMagnet/Brodeur Partners' **Conversational Relevance™** examines online posts and conversations looking for cues and clues for what is relevant when talking about an issue, brand or product. Brodeur Partners' relevance model focuses on four areas:
  - **Functional:** Practical attributes to look out for
  - **Values:** Attributes that are most admired and reflect personal values
  - **Social:** Attributes to feel proud of and want to share the experience
  - **Sensory:** Attributes that are most interesting and appeal to the senses
- The research focuses on the hospitality industry to set benchmarks on what are the most relevant factors that influence consumers' purchase decisions / patronage

# RESEARCH OBJECTIVES

Our goal is to better understand **the most relevant elements that cause people to make hotel selections in the United States**. Knowing that these factors vary significantly based on populations and type of travel, we identified conversations focused on **leisure vs. business travel** and those **traveling with and without children**.



# CONVERSATIONAL RELEVANCE™ ABOUT THE FOLLOWING...

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1. Best Western
2. Four Seasons
3. Hilton
4. Hyatt
5. Holiday Inn
6. Marriott
7. Radisson
8. Ritz-Carlton
9. Sheraton
10. Wyndham

# EXECUTIVE SUMMARY

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## Key Takeaways

**Hilton, Marriott and Four Seasons** had the highest Conversational Relevance™

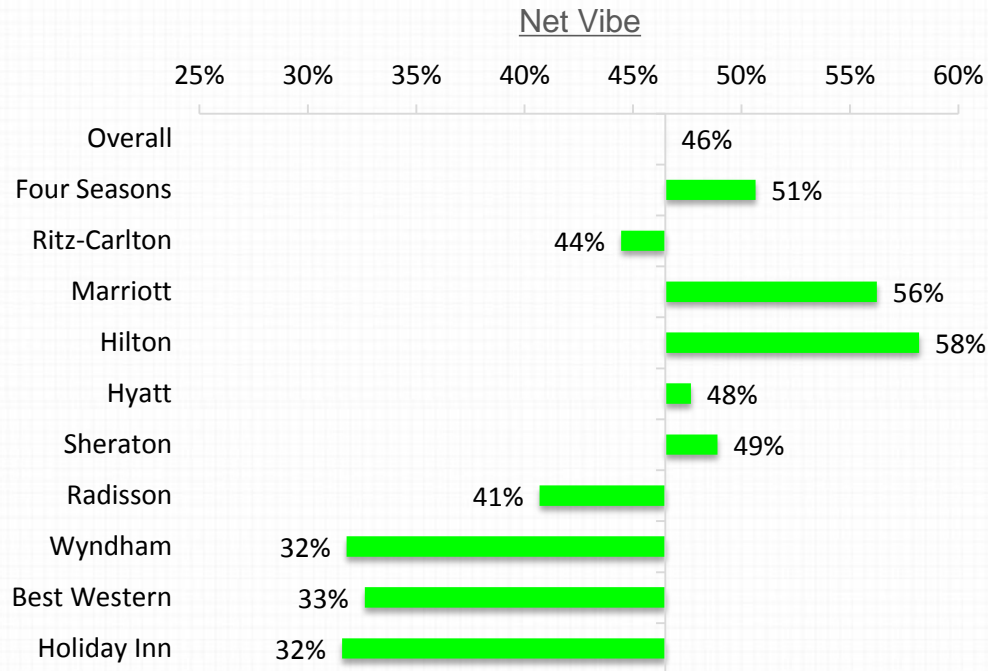
Key elements for **functional relevance** were issues of hotel service, location and recreation, functionality of the room, and rewards program  
Top Score : **Marriott and Hilton**

Key elements for **sensory relevance** were matters of sight (view), taste (food), and feel (shower)  
Top Score : **Ritz-Carlton**

Key elements for **values relevance** were management and staff-based sense of service, luxury and commitment to quality  
Top Score : **Four Seasons**

Key elements for **social relevance** were 'peer reviews,' being considered 'best in class' and being associated with something 'luxurious'  
Top Score : **Four Seasons**

# OVERALL CONVERSATIONAL RELEVANCE™



18360 conversations analyzed

Net Vibe is defined as the difference between percentage of positive buzz and percentage of negative buzz on a given topic.



# FUNCTIONAL RELEVANCE: KEY FINDINGS

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1. **Service** and **location** are the biggest “functional” conversation drivers.
2. The second “tier” of factors are **rooms**, **recreation**, and **rewards programs**.
3. The biggest “gaps” in conversation were **room cleanliness and hygiene** (a big factor for business travelers but weak for leisure travelers) and **recreation** (strong among leisure travelers; weak among business travelers).
4. The big winners were **Marriott**, **Hilton** and **Sheraton**, all with above average volume and positive buzz.
5. The big losers among business travelers were **Radisson** and **Best Western** who had above average buzz volumes but net negative commentary.





## FUNCTIONAL RELEVANCE: KEY FINDINGS

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7. The **Ritz Carlton** was particularly popular in conversations among leisure travelers with children; **Marriott** has an opportunity with this audience as they get positive conversational buzz which is not highly leveraged.
8. A big factor in how people talk about service is not just the quality of the staff but also **the ability to check in and check out easily**.
9. That same theme dominates discussions about location. What drives nearly two-thirds of the online conversations about location is about **accessibility** – both accessibility of the hotel as well as access to things around the hotel.
10. When it comes to conversations about rooms, **size matters**, closely followed by **connectivity and technology**.
11. The pool is the most discussed recreational component. However that was closely followed by the **lounge and common areas** of a hotel.



## SENSORY RELEVANCE: KEY FINDINGS

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1. The **Ritz Carlton** and **Hilton** scored best in online conversation in the sensory category among all travelers. Both had high net positive and higher than average buzz ratings.
2. The **Radisson**, **Wydhm**, **Best Western** and **Holiday Inn** did the worst among all travelers. All had net negative conversations on this topic. The good news for **Best Western** (which had the highest percentage of negative sensory conversations) was that their online buzz volume was low.
3. The **Ritz Carlton** and **Hyatt** scored the best among business and leisure travelers in the sensory category. Both had high net positive and higher than average buzz ratings.
4. **Wydhm** had a particularly low rating among business travelers with one of the highest negatives compounded by a high buzz rating.
5. There appears to be an opportunity for **Hyatt** among leisure travelers. They have a high net positive rating in the sensory category but their buzz volume is low.



## SENSORY RELEVANCE: KEY FINDINGS

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6. The sensory elements that dominate conversations about the hotels we tested were **sight** and **taste**. Elements of **touch**, **sound** and **taste** were less talked about online.
7. The biggest “gaps” between business and leisure travelers was in the area of **touch** or **tactile** experience. In general, sensory was **much more important to business travelers** than leisure travelers.
8. There was the highest ratio of negative to positive conversations when it came to “**sound**.” Room noise was a big topic of conversation in this category, particularly among family travelers.
9. The subject that dominated conversations about food was **breakfast**. There was very little online conversations about a hotel’s dining facilities or dinner menu.
10. While there has been a lot of investment by hotels in the quality of beds, the subject that most people talked about in the “touch” or “feel” category was the shower, specifically the **water pressure of the shower**.



## VALUES RELEVANCE: KEY FINDINGS

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1. The notion of values was most expressed online in terms of **service**. Most conversations connected the **concepts of ethos and values with putting service first** and foremost as part of their culture. A particularly important element that drove online conversation was a **hotel staff's responsiveness** and personal attention to individual needs.
2. After personal service, online conversations tended to frame values in brand commitments to imbue an experience of luxury and quality. People often make their moral and ethical assumptions of a hotel by the hotel's **ability to impart a feeling or sense of luxury** among its patrons.
3. Issues of brand **integrity and individuality** were part of the conversation. But they were not only less important, they were more likely to be negative conversations than positive.



## VALUES RELEVANCE: KEY FINDINGS

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4. Interestingly, business travelers were most likely to view the ethics and values of a hotel in terms of its commitment to service and its **'trustworthiness' or reliability in meeting their expectations**. By contrast, leisure travelers more often define the ethics of an hotel through its ability to deliver an experience that was both superior and restful.
5. The **Four Seasons** is by far and away the category leader. They not only have (by far) the highest net positive vibe, those that have experienced the Four Seasons are highly influence online buzz.
6. By contrast, the **Wyndham** was by far the worst in this category having a high negative vibe accompanied by a high level of buzz and influence volume.
7. **Hyatt** is a curious situation. It a great opportunity with business travelers: it has strong positive vibe, but weak volume. By contrast, it has one of the highest percentage of negative vibes or conversation among leisure travelers.



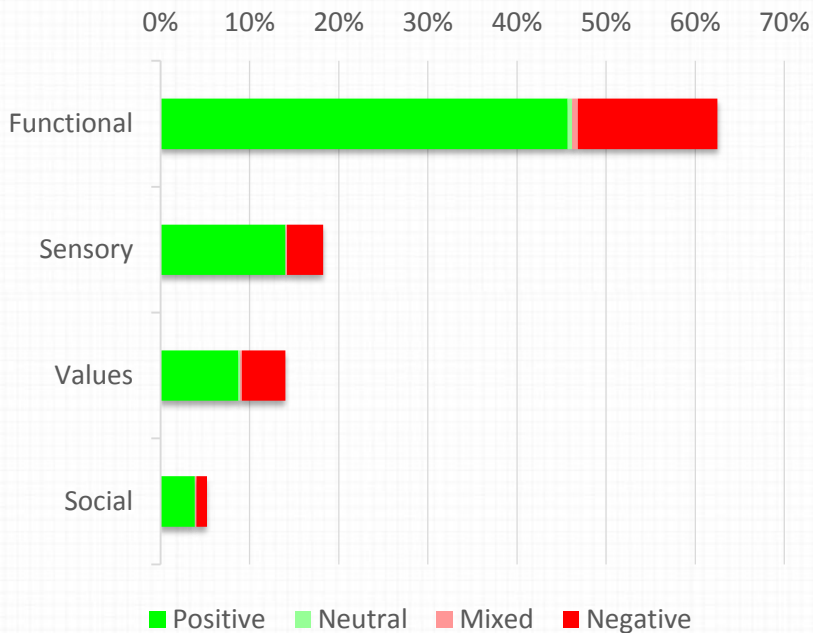
## SOCIAL RELEVANCE: KEY FINDINGS

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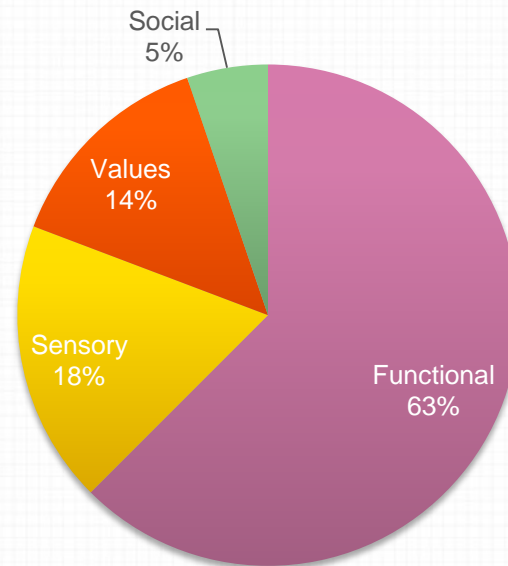
1. The biggest driver of social conversations is what one hears about a hotel from others and whether a person views that hotel as “**referenceable**” – that is, something that they would recommend to others.
2. Second in importance was whether a hotel was considered “best in class” along with what types of recognition it has received from others.
3. The idea that “luxury” or “indulgence” was a **symbol of status and achievement** drove a lot of conversation in this category, however one-third of that discussion was negative.
4. By far the biggest driver of conversation among **business travelers** was whether that hotel was considered “**best in class.**” **Leisure travelers’** social relevance derived more from **peer reviews.**
5. The **Four Seasons** hotel chain dominated this category of conversation among both business and leisure travelers

# CONVERSATIONAL RELEVANCE™ FACTORS

% Split of Vibe by Relevance Categories

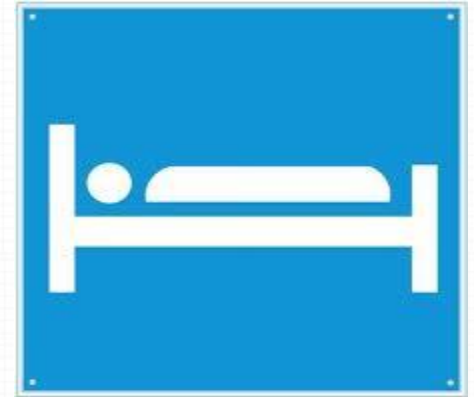


% Split of Buzz by Relevance Categories



# WHERE ARE CONVERSATIONS TAKING PLACE?

- More than 95% of the conversations were from 47 different forums, communities and message boards. Following is the list of top sources:
  - Fodors.com
  - Lonelyplanet.com
  - Concierge.com
  - Frommers.com
  - Flyers.com
  - Tripadvisor.com
  - Hotelchatter.com
  - Hotelguide.net
  - Micechat.com
  - Yahoo Answers
  - Yelp
  - Google Groups





**For a presentation of the complete set of data,  
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