

# TrustYou's QUARTERLY REPORT: DESTINATION USA

3rd Quarter 2013

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## Third Quarter US Hotel Review Headlines:

TrustScores: 

Management responses: 

Volume of Reviews: 

Gains and Losses by Review Sites: 

With price satisfaction on the rise, is there room for ADR increases?

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## Written by:

Margaret Ady, Marketing Director at TrustYou

Donna Quadri-Felitti, Clinical Associate Professor of Hospitality and Tourism Management at New York University, Preston Robert Tisch Center for Hospitality, Tourism, and Sports Management.



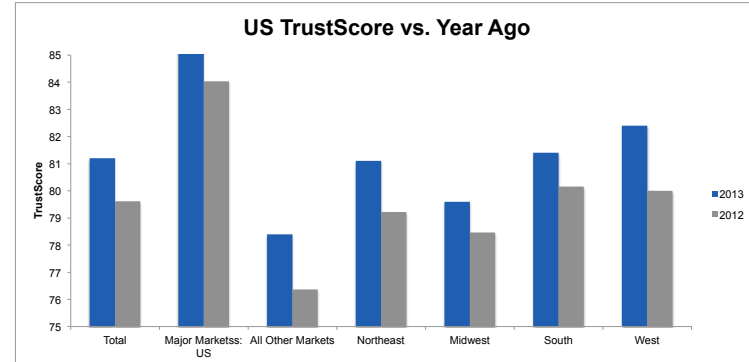
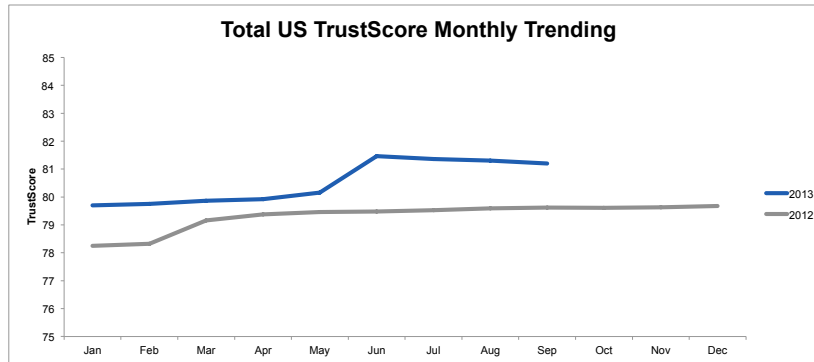
### Review Analysis Highlights:

TrustYou's TrustScores measure review scores on a global scale, across all review sites worldwide, providing a global overview of what consumers are saying about their hotel experiences. The scores are based on a scale of 1-100, with scores above 87 considered "excellent."

In third quarter 2013, TrustScores rose 2% in the US, signaling higher consumer satisfaction with during hotel visits. Major US markets earned higher TrustScores (85.2) over all other US markets (78.4), however, non-major markets improved at a faster rate. By region, the biggest year-over-year improvements were in the West (+3.0%) and the Northeast (+2.6%).

One potential contributor to higher TrustScores is the major year-over-year improvements in management response rates, which have improved 13 percentage points in the US. When analyzing management response rates, we are aware that some review sites delay publicly showing management responses until up to 72 hours after a review was written. The data within this report only reflects management responses that were publicly shown at the quarter's end. When looking at changes in the data after 72 hours, management response rates may improve, on average, 1% in major US markets.

Despite higher scores and management response rates, the volume of consumer reviews is down this quarter in 21 of the top 25 major markets. Markets with the biggest year-over-year declines are: Seattle (-24.1%), San Francisco (-22.9%) and Oahu Island (-22.7%). The percentage of 5-star reviews has also dropped from a year ago by double-digit percentages, particularly among major markets in the US.



3rd Quarter 2013 vs. 3rd Quarter 2012														
	TrustScore		Total Number of Reviews		Percentage of 5-star reviews		Avg. Number of Reviews Per Property		Management Response Rate		Percent Change, 2013 vs. 2012			
	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	TrustScore	Total Reviews	% 5-Star Reviews	Management Response Rate
<b>Total United States</b>	81.2	79.6	261891	287537	38%	53%	96	105	29%	16%	2.0%	-8.9%	-28.1%	82.0%
Major Markets: US	85.2	84.0	198437	216641	39%	56%	160	175	28%	17%	1.4%	-8.4%	-29.7%	63.2%
All Other Markets	78.4	76.4	63454	70896	36%	46%	49	54	30%	15%	2.7%	-10.5%	-22.3%	98.0%
<b>Regions</b>														
Northeast	81.1	79.2	39717	40492	37%	57%	112	120	29%	16%	2.4%	-1.9%	-35.2%	85.8%
Midwest	79.6	78.5	35457	39460	38%	54%	63	66	31%	16%	1.4%	-10.1%	-30.7%	93.8%
South	81.4	80.2	75269	77687	41%	54%	74	82	30%	17%	1.5%	-3.1%	-23.4%	75.5%
West	82.4	80.0	111448	129907	37%	52%	143	156	27%	15%	3.0%	-14.2%	-28.0%	79.9%
<b>Major Markets: US</b>														
Atlanta, GA	86.4	86.4	4590	4734	41%	57%	94	97	41%	28%	0.0%	-3.0%	-27.7%	47.7%
Boston, MA	86.7	84.9	11975	13174	35%	57%	240	263	24%	17%	2.1%	-9.1%	-38.9%	43.8%
Chicago, IL	88.1	88.8	11038	12745	41%	62%	221	255	41%	21%	-0.8%	-13.4%	-32.7%	94.3%
Dallas, TX	85.1	85.0	5062	5418	42%	54%	101	108	32%	17%	0.1%	-6.6%	-21.9%	89.1%
Denver, CO	86.6	86.0	5743	5723	42%	56%	115	114	37%	24%	0.7%	0.3%	-24.7%	52.7%
Detroit, MI	72.6	70.1	1694	2019	32%	48%	50	59	17%	9%	3.5%	-16.1%	-33.0%	89.0%
Houston, TX	87.5	85.9	2871	2895	52%	61%	56	57	38%	25%	1.8%	-0.8%	-14.9%	50.4%
Las Vegas, NV	86.5	84.6	35980	37986	40%	56%	720	760	16%	8%	2.3%	-5.3%	-29.3%	101.0%
Los Angeles, CA	84.1	84.9	8403	8748	29%	50%	168	175	27%	17%	-1.0%	-3.9%	-41.4%	59.5%
Miami, FL	84.3	83.4	7983	6927	34%	56%	160	139	22%	18%	1.1%	15.2%	-40.5%	21.5%
Minneapolis, MN	79.4	79.5	3373	3685	34%	47%	69	75	32%	15%	-0.1%	-8.5%	-29.1%	115.9%
Nashville, TN	83.8	81.6	4586	4859	37%	52%	96	101	17%	9%	2.7%	-5.6%	-29.5%	90.0%
New Orleans, LA	86.3	83.1	6549	7018	47%	57%	131	140	17%	8%	3.9%	-6.7%	-16.2%	116.5%
New York, NY	90.5	90.0	10877	11734	48%	70%	218	235	27%	15%	0.6%	-7.3%	-30.6%	78.8%
Norfolk-Virginia Beach, VA	82.0	79.6	4041	4538	30%	39%	81	91	36%	23%	3.0%	-11.0%	-22.8%	55.1%
Oahu Island, HI	82.3	81.5	8759	11332	37%	45%	175	227	30%	19%	1.0%	-22.7%	-17.7%	60.5%
Orlando, FL	89.0	88.3	10860	11326	51%	65%	222	231	25%	18%	0.8%	-4.1%	-21.8%	37.7%
Philadelphia, PA	83.9	81.3	8728	8673	32%	49%	175	173	29%	17%	3.2%	0.6%	-33.5%	69.7%
Phoenix, AZ	86.8	85.0	2667	2896	47%	60%	53	58	28%	15%	2.0%	-7.9%	-21.2%	89.9%
San Diego, CA	87.4	86.1	7051	8216	41%	56%	141	164	29%	18%	1.5%	-14.2%	-27.1%	62.3%
San Francisco, CA	86.7	86.4	8955	11613	37%	54%	179	232	28%	15%	0.4%	-22.9%	-32.0%	89.1%
Seattle, WA	86.1	85.8	8810	11605	34%	55%	176	232	26%	15%	0.3%	-24.1%	-38.2%	75.8%
St. Louis, MO	85.5	85.3	5482	5725	37%	55%	110	115	25%	20%	0.3%	-4.2%	-32.8%	27.1%
Tampa-St. Petersburg, FL	84.5	81.0	2848	2450	44%	50%	57	49	34%	20%	4.4%	16.2%	-13.2%	71.6%
Washington, DC	87.0	86.6	9512	10602	38%	59%	190	212	30%	24%	0.5%	-10.3%	-35.6%	25.0%



### Guest Satisfaction Drivers (Sentiment Analysis) Highlights:

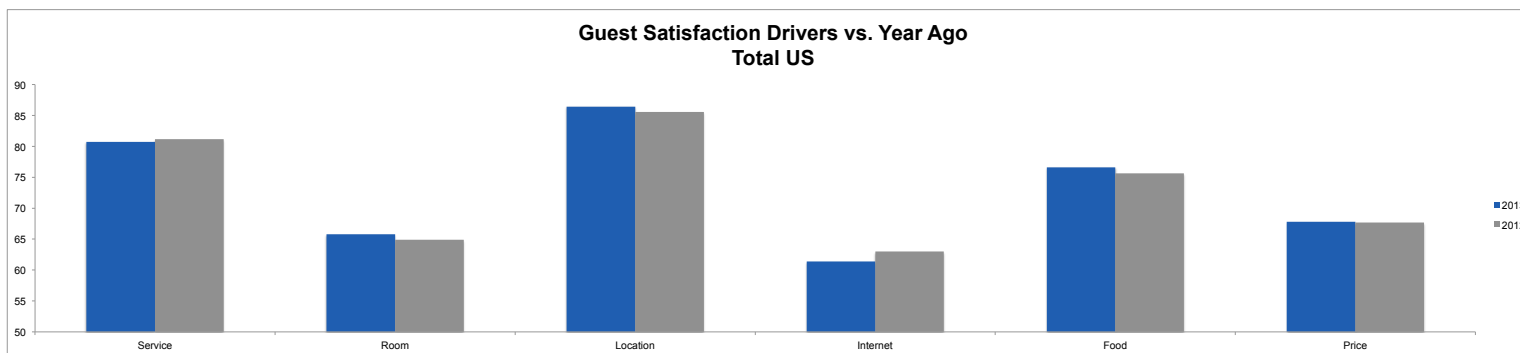
Sentiment scores are generated using TrustYou's proprietary semantic technology, which detects positive, negative and neutral sentiments for various categories within review text to understand what is driving guest satisfaction and overall review scores. The technology was developed using 50+ combined years of research and development, together with the best university researchers, trained linguists and developers. TrustYou's technology works in 23 languages. Scores are based on a 1-100 scale.

Consumer satisfaction with hotel location, room and food rose from the same period a year ago, while service and internet declined. Satisfaction with location may reflect the growing popularity of digital maps in the traveler's search for and selection of the right hotel for his or her particular need. Sentiment scores on food and beverage among hotel guests improved with 60% of the major markets enjoying positive improvements for the quarter.

**Service:** While service received some of the highest scores among travelers, there was a slight year-over-year decline (-0.6%) with major markets falling more (-1.3%) than other markets in the US. Despite these declines, service scores improved in a number of markets including Dallas (+2.5%), Norfolk-Virginia Beach (1.8%) and Tampa-St. Petersburg (+1.7%).

**Internet:** Internet, a topic of animated debate among hoteliers, was a source of declining satisfaction for guests. Scores saw year-over-year declines of -2.6%; however, some markets are getting it right: 13 of the 25 major US markets are seeing improvements in this sentiment score. This disparity in scores may suggest overall confusion about internet and pricing.

**Price:** Generally sentiment scores on the price-value satisfaction rose, particularly among major US markets. Boston was the biggest winner, with year-over-year satisfaction improving +57.2%; whereas Los Angeles price sentiment fell over 20 percentage points. In some markets, hoteliers may wish to tell their value-proposition story to travelers differently and in others, revenue managers may see opportunities to raise rates.



	3rd Quarter 2013 vs. 3rd Quarter 2012												Percent Change 2013 vs. 2012						
	Service		Room		Location		Internet		Food		Price		Service	Room	Location	Internet	Food	Price	
	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012							
<b>Total United States</b>	80.7	81.2	65.8	64.9	86.4	85.6	61.4	63.0	76.6	75.7	67.8	67.7	-0.6%	1.4%	1.0%	-2.6%	1.3%	0.1%	
Major Markets: US	81.2	82.3	70.4	70.4	87.5	84.8	62.1	62.2	78.2	78.1	70.3	65.4	-1.3%	0.0%	3.1%	-0.2%	0.1%	7.5%	
All Other US Markets	79.8	80.3	62.4	60.9	85.6	86.5	60.9	63.6	75.5	73.9	66.0	69.4	-0.6%	2.5%	-1.1%	-4.3%	2.2%	-4.9%	
<b>Region</b>																			
Northeast	79.4	80.4	64.4	63.4	87.0	85.5	62.1	62.0	74.5	73.5	68.1	70.1	-1.2%	1.7%	1.7%	0.1%	1.3%	-2.8%	
Midwest	80.2	81.2	64.9	63.9	86.0	85.8	59.2	62.7	75.7	75.1	68.2	65.2	-1.2%	1.6%	0.2%	-5.6%	0.8%	4.7%	
South	80.9	81.4	65.2	65.1	86.3	85.4	61.5	63.3	76.8	75.6	68.6	67.1	-0.6%	0.2%	1.1%	-2.9%	1.6%	2.3%	
West	81.3	81.4	67.9	66.4	86.6	85.7	62.5	63.6	78.2	77.6	66.3	67.9	-0.2%	2.3%	1.0%	-1.7%	0.7%	-2.3%	
<b>Major Markets: US</b>																			
Atlanta, GA	83.4	84.0	70.4	69.6	84.9	82.9	55.0	61.1	79.1	78.9	75.9	60.3	-0.8%	1.2%	2.4%	-10.1%	0.2%	26.0%	
Boston, MA	83.3	82.4	69.7	70.1	91.3	90.5	62.0	62.3	76.3	78.1	91.2	58.0	1.1%	-0.5%	0.8%	-0.4%	-2.3%	57.2%	
Chicago, IL	85.3	85.8	73.0	73.2	93.0	92.5	68.0	71.2	80.6	82.1	60.6	61.9	-0.6%	-0.3%	0.5%	-4.6%	-1.7%	-2.2%	
Dallas, TX	78.9	77.0	68.0	67.2	81.3	79.3	50.3	47.5	76.0	76.7	59.9	61.5	2.5%	1.1%	2.5%	5.9%	-1.0%	-2.7%	
Denver, CO	84.9	83.8	73.3	75.2	88.3	86.0	65.4	73.4	82.1	80.5	65.1	69.5	1.3%	-2.6%	2.8%	-10.8%	1.9%	-6.4%	
Detroit, MI	76.2	76.1	70.8	69.7	83.7	82.7	52.7	64.9	73.4	71.4	64.1	67.5	0.0%	1.6%	1.3%	-18.8%	2.8%	-5.1%	
Houston, TX	82.0	84.7	72.8	74.4	85.4	82.6	65.5	71.5	80.0	80.3	71.3	71.6	-3.2%	-2.2%	3.3%	-8.5%	-0.4%	-0.4%	
Las Vegas, NV	72.0	71.5	72.5	73.2	87.3	89.2	50.0	53.6	74.9	75.7	69.3	62.6	0.7%	-1.0%	-2.2%	-6.8%	-1.1%	10.7%	
Los Angeles, CA	82.4	81.9	71.0	69.3	82.8	82.4	64.7	63.6	78.0	77.6	50.0	63.5	0.6%	2.4%	0.6%	1.7%	0.6%	-21.3%	
Miami, FL	80.1	83.5	73.4	77.7	85.5	84.6	68.2	65.5	76.4	79.8	65.8	68.7	-4.1%	-5.5%	1.1%	4.0%	-4.3%	-4.2%	
Minneapolis, MN	79.3	78.6	68.5	67.2	87.2	85.5	53.8	62.2	74.3	76.5	78.4	63.3	0.9%	1.9%	2.1%	-13.5%	-2.9%	23.9%	
Nashville, TN	80.4	82.2	66.1	64.6	86.4	85.6	60.8	61.4	76.6	76.9	69.6	57.8	-2.2%	2.4%	0.9%	-0.9%	-0.5%	20.4%	
New Orleans, LA	83.5	85.1	65.8	67.5	90.4	88.7	62.8	56.7	79.6	80.3	76.0	70.8	-1.9%	-2.6%	1.9%	10.8%	-0.9%	7.4%	
New York, NY	88.5	89.1	79.1	78.4	94.5	93.8	81.2	87.0	82.9	81.5	90.3	69.5	-0.7%	0.8%	0.8%	-6.7%	1.7%	30.0%	
Norfolk-Virginia Beach, VA	77.8	76.4	63.2	59.8	87.2	86.8	57.6	52.7	74.3	71.4	72.7	60.8	1.8%	5.7%	0.5%	3.9%	4.0%	19.5%	
Oahu Island, HI	80.9	80.5	67.3	66.5	86.7	85.7	64.3	62.6	75.4	72.6	72.7	64.9	0.5%	1.2%	1.1%	2.7%	3.8%	12.1%	
Orlando, FL	79.9	81.5	74.0	75.3	87.8	86.9	60.9	62.7	76.8	77.3	59.2	67.6	-2.0%	-1.7%	1.0%	-2.9%	-0.6%	-12.4%	
Philadelphia, PA	80.5	81.3	67.2	66.4	87.8	85.7	59.3	57.5	74.9	74.5	62.8	60.2	-1.1%	1.2%	2.4%	3.1%	0.6%	4.4%	
Phoenix, AZ	83.0	84.6	72.2	73.2	86.7	86.0	67.6	67.0	79.6	79.0	70.7	76.9	-1.9%	-1.3%	0.9%	0.9%	0.8%	-8.1%	
San Diego, CA	84.1	84.0	71.7	71.3	86.6	85.6	66.0	64.8	81.4	80.4	68.9	59.2	0.1%	0.5%	1.2%	1.8%	1.2%	16.3%	
San Francisco, CA	86.3	87.2	70.7	71.3	90.2	89.4	66.9	62.6	80.9	81.0	70.2	62.1	-1.0%	-0.8%	0.9%	6.8%	-0.1%	13.1%	
Seattle, WA	84.8	84.5	72.6	72.2	89.2	88.8	65.2	65.3	81.3	81.0	61.3	64.3	0.3%	0.5%	0.9%	0.5%	0.3%	-4.7%	
St. Louis, MO	81.9	82.5	68.1	66.0	85.5	84.9	59.0	51.2	81.0	81.5	85.0	69.7	-0.8%	3.1%	0.7%	15.2%	-0.6%	22.0%	
Tampa-St. Petersburg, FL	83.8	82.4	66.7	67.7	87.6	88.0	57.7	44.5	79.2	78.2	75.6	72.6	1.7%	-1.6%	-0.5%	29.5%	1.2%	4.1%	
Washington, DC	84.4	86.6	71.2	73.2	90.4	89.6	67.7	61.9	79.5	78.9	69.6	70.2	-2.5%	-2.8%	0.8%	9.4%	0.7%	-1.0%	

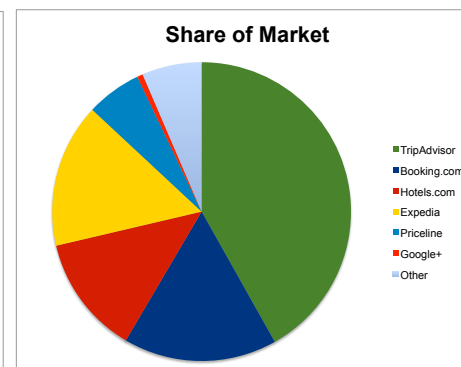
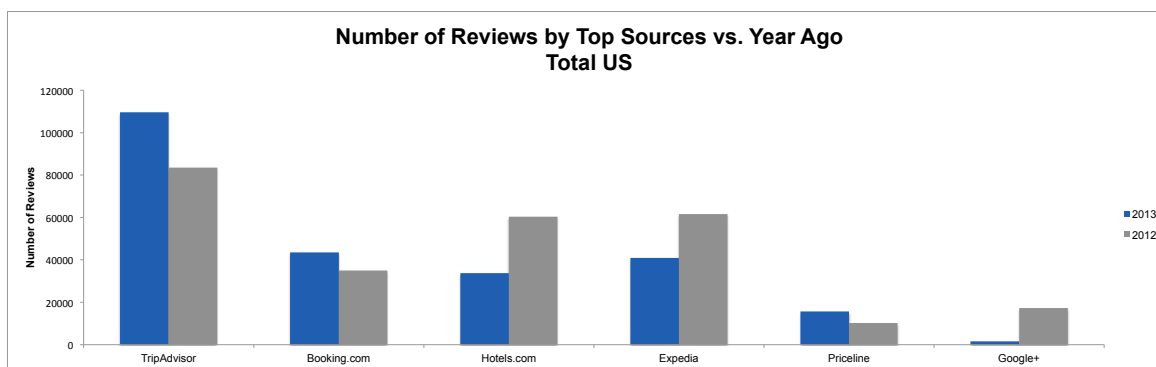


### Reviews by Source Highlights:

[TripAdvisor](#) remained the biggest player in the US in terms of volume of reviews, accounting for 42% of all reviews written about hotels in the US during the third quarter. TripAdvisor was also the only major source that saw year-over-year percentage gains across all major US markets despite a decrease in total volume of reviews this quarter.

[Booking.com](#) and [Priceline](#) also posted year-over-year growth, accounting for 16% and 6% of all reviews written about hotels in the US, respectively. Hotels.com and Expedia saw double digit declines in volume of reviews across nearly all major markets in the US.

[Google+](#) also posted significant year-over-year declines in terms of volume of reviews, however, last year (on May 30, 2012), Google had just launched Google+ local, which may have led to a surge of Google reviews a year ago.



	3rd Quarter 2013 vs. 3rd Quarter 2012										Percent Change, 2013 vs. 2012							
	TripAdvisor		Booking.com		Hotels.com		Expedia		Priceline		Google+		TripAdvisor	Booking.com	Hotels.com	Expedia	Priceline	Google+
	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012						
<b>Total United States</b>	109605	83477	43494	34975	33715	60409	40873	61617	15649	10252	1623	17309	31.3%	24.4%	-44.2%	-33.7%	52.6%	-90.6%
Major Markets: US	81799	64292	35816	29704	23812	43564	30576	44512	11691	2697	1294	11993	27.2%	20.6%	-45.3%	-31.3%	333.5%	-89.2%
All Other US Markets	27806	19185	7678	5271	9903	16845	10297	17105	3958	7555	329	5316	44.9%	45.7%	-41.2%	-39.8%	-47.6%	-93.8%
<b>Region</b>																		
Northeast	14430	12186	7843	7456	4878	8018	5526	8208	3095	1586	150	608	18.4%	5.2%	-39.2%	-32.7%	95.1%	-75.3%
Midwest	16054	10741	4049	2981	5328	9130	5264	9159	3822	2332	289	2582	49.5%	35.8%	-41.6%	-42.5%	63.9%	-88.8%
South	33964	24293	11377	8699	11027	17092	10839	17217	4147	3211	455	3018	39.8%	30.8%	-35.5%	-37.0%	29.1%	-84.9%
West	45157	36257	20225	15839	12482	26169	19244	27033	4585	3123	729	11101	24.5%	27.7%	-52.3%	-28.8%	46.8%	-93.4%
<b>Major Markets: US</b>																		
Atlanta, GA	1926	1539	372	320	639	944	610	962	692	478	31	153	25.1%	16.3%	-32.3%	-36.6%	44.8%	-79.7%
Boston, MA	4495	3915	2855	2848	1417	2392	1552	2380	896	591	40	154	14.8%	0.2%	-40.8%	-34.8%	51.6%	-74.0%
Chicago, IL	4827	4217	1790	1634	1217	2357	1301	2304	943	504	126	790	14.5%	9.5%	-48.4%	-43.5%	87.1%	-84.1%
Dallas, TX	2111	1291	301	143	718	1103	632	1131	838	553	47	642	63.5%	110.5%	-34.9%	-44.1%	51.5%	-92.7%
Denver, CO	2260	1737	546	334	1062	1328	958	1420	614	226	23	303	30.1%	63.5%	-20.0%	-32.5%	171.7%	-92.4%
Detroit, MI	545	422	202	138	300	550	345	520	156	115	15	148	29.1%	46.4%	-45.5%	-33.7%	35.7%	-89.9%
Houston, TX	1375	880	261	126	386	601	341	607	271	198	29	302	56.3%	107.1%	-35.8%	-43.8%	36.9%	-90.4%
Las Vegas, NV	13815	9836	7433	6087	3102	7796	6818	8082	1284	606	350	1761	40.5%	22.1%	-60.2%	-15.6%	111.9%	-80.1%
Los Angeles, CA	2978	2448	2488	1649	990	1674	1040	1652	304	325	31	442	21.7%	50.9%	-40.9%	-37.0%	-6.5%	-93.0%
Miami, FL	2987	1789	2340	1498	1114	1572	1035	1430	141	229	31	121	67.0%	56.2%	-29.1%	-27.6%	-38.4%	-74.4%
Minneapolis, MN	1196	782	391	163	526	923	544	919	405	329	24	249	52.9%	139.9%	-43.0%	-40.8%	23.1%	-90.4%
Nashville, TN	2044	1390	486	387	863	1077	801	1110	185	243	31	379	47.1%	25.6%	-19.9%	-27.8%	-23.9%	-91.8%
New Orleans, LA	2861	2250	869	606	1163	1568	1090	1623	252	238	33	338	27.2%	43.4%	-25.8%	-32.8%	5.9%	-90.2%
New York, NY	5288	4426	2514	2803	903	1912	1498	1892	140	128	36	124	19.5%	-10.3%	-52.8%	-20.8%	9.4%	-71.0%
Norfolk-Virginia Beach, VA	1628	1473	880	486	647	1127	607	1153	77	68	19	51	10.5%	81.1%	-42.6%	-47.4%	13.2%	-62.7%
Oahu Island, HI	4258	3666	998	821	665	2007	1823	1960	118	80	34	1850	16.1%	21.6%	-66.9%	-7.0%	47.5%	-98.2%
Orlando, FL	6095	4993	1487	1239	1055	2157	1646	2169	171	171	68	202	22.1%	20.0%	-51.1%	-24.1%	0.0%	-66.3%
Philadelphia, PA	2899	2127	1519	1260	1429	1936	1311	2120	967	489	35	127	36.3%	20.6%	-26.2%	-38.2%	97.8%	-72.4%
Phoenix, AZ	1160	843	315	242	410	653	401	653	154	104	20	169	37.6%	30.2%	-37.2%	-38.6%	48.1%	-88.2%
San Diego, CA	3079	2415	912	716	772	1406	898	1424	615	337	59	1266	27.5%	27.4%	-45.1%	-36.9%	82.5%	-95.3%
San Francisco, CA	3650	3515	2151	2176	856	1920	1200	1964	155	218	59	1071	3.8%	-1.1%	-55.4%	-38.9%	-28.9%	-94.5%
Seattle, WA	3420	3074	1691	1206	1028	2446	1476	2680	537	454	35	939	11.3%	40.2%	-58.0%	-44.9%	18.3%	-96.3%
St. Louis, MO	1977	1461	407	168	860	1443	890	1546	1072	532	51	295	35.3%	142.3%	-40.4%	-42.4%	101.5%	-82.7%
Tampa-St. Petersburg, FL	1237	730	379	185	492	646	414	621	175	104	40	50	69.5%	104.9%	-23.8%	-33.3%	68.3%	-20.0%
Washington, DC	3688	3073	2229	2469	1198	2026	1345	2190	529	235	27	67	20.0%	-9.7%	-40.9%	-38.6%	125.1%	-59.7%

### TRUSTYOU\*\*\*

\*Reviews from sources labelled "Other" come from one of the other 250+ sources that TrustYou tracks



## Key Takeaways and What to Watch For

### TrustScores And Management Response Rates On The Rise

The competitive intensity of major hotel markets puts pressure on hotel management to constantly monitor and improve review scores of their hotel portfolios. TrustYou's TrustScores provide a global overview of review scores and sentiments across all review sites and social platforms worldwide. During the third quarter, the top five TrustScores in the US went to New York (90.5), Orlando (88.98), Chicago (88.12), Houston (87.48), and San Diego (87.38). The markets with the most improved TrustScores, year-over-year, were Tampa-St.Petersburg (+3.6%), New Orleans (+3.2%), and Philadelphia (+2.6%). Good news for besieged Detroit, Michigan with an improved TrustScore for its hotels of 2.5% over the 2012 third quarter.

Hoteliers across the US have taken heed of the consumer's voice and embraced responding to more guest reviews. In particular hoteliers in the Midwest, led by hotel managers in Chicago and Minneapolis, increased the volume of management responses by over 15 percent from third quarter 2012. Hoteliers in every market increased the number of their responses by double-digit percentages over these same months last year. This may be one reason TrustScores are up across the US in general. Engaging guests directly helps build credibility and trust among travelers in the public review environment.

### Drop in Volume of Reviews

Conversely, consumer review volume on the whole was down with a nearly nine percent drop in reviews from third quarter last year. The average number of reviews per hotel dropped by nine and by 15 in major markets. Consumer review fatigue may be setting in; however, we caution that this may not tell the entire story of the data. Repeat guests may not feel compelled to review a hotel for each stay or may be more selective about when and which properties they review. The 2012 drive by hoteliers to solicit guest reviews may have plateaued and the new priority of responding to consumer reviews may have taken precedence in 2013. In addition, consumers may be choosing a single favorite review site and avoiding posting multiple reviews per stay. This overall drop in review volume underscores the importance of each review and management's thoughtful response to each.

### Despite Higher TrustScores, Hotels See a Decline in 5-Star Reviews

Another important trend to watch is the drop in percentage of reviews that consumers rate as 5-star. Across all markets and regions, consumers were less likely to rate their hotel experiences as 5-star this quarter compared to the same period last year. As consumers continue to read and trust the reviews of fellow travelers, they may likely adjust their expectations and in choosing a highly rated hotel that adjustment may be upwards. This creates greater demands on hotel management to exceed expectations, to delight and surprise guests, and to differentiate their product and service delivery on what are increasingly high traveler expectations.

### Sentiment Analysis Behind the TrustScores

When it comes to satisfaction drivers, hotel location, room, and food appear to be contributing positively to the increase in TrustScores for the US hotel guest. There are winners and losers in the sentiment analysis on price satisfaction but for the majority of markets (14 of the 25) pricing is not a sore spot for consumers relative to last year, suggesting pricing opportunities for many markets.

While service satisfaction received some of the highest TrustScores during the third quarter for US hotels, consumer heightened service expectations puts pressure on hoteliers to invest in superior service delivery. The confusion about pricing for wireless access as well as the actual cost is a sore spot for many travelers perhaps more so for the leisure guest who may travel less frequently. A recent survey of 650 travel agents by [TravelClick](#) reported that free internet (79%) is a top priority to driving agency bookings. Most consumers do not comprehend why every [Starbucks](#) or [McDonald's](#) in the US offer free Wi-Fi but it costs them over \$13 per day when staying in a US hotel with an average room rate of over \$112.00 as projected by [Smith Travel Research](#) for 2013.

### Reviews by Source

The dominance of TripAdvisor as a review source is not unexpected. Drops in the number of reviews in other key hotel distribution channels may be driven by a number of factors including hoteliers' focus on driving reservations through brand.com, changes in the distribution revenue models, and seasonal booking trends. Additional market by market analysis by distribution channel is warranted.

The Google+ story (decline in reviews) is an interesting one and may present some opportunities for hotels. Recent research by [Digital Marketing Works](#) found that the volume and score of reviews written on Google is highly correlated to Google's Carousel rank or simply more reviews on Google = more visibility for hotels in search results.

### Conclusion

The three months of July, August, and September are the traditional heart of the summer family vacation season; group social travel associated with reunions, weddings, Labor Day holiday travel, back-to-college trips, and association meetings. These may affect the nature and volume of consumer hotel reviews differently than in the other US travel seasons. Look for our next report summarizing the year in review and the 4th Quarter.



## Glossary

### All Other Markets: US

Reviews and semantic analysis from a randomly selected sample of hotels outside of the Major Markets: US. These scores take into account all reviews written about the sample of hotels within this group, across 250+ review and social media sites in 23 languages worldwide.

### Average Number of Reviews Per Property

The average number of reviews received for each property for the quarter.

### Major Markets: US

Reviews and semantic analysis from a randomly selected sample of 50 hotels in each major market within the US. These scores take into account all reviews written about the sample of hotels within this group, across 250+ review and social media sites in 23 languages worldwide.

### Management Response Rate

The percentage of reviews that have received management responses from websites that allow hotels to post public responses. [Reviews with responses / total amount of reviews on websites that allow public responses]

### Method for Semantic Analysis calculations (Service, Room, Internet, Food, Price):

TrustYou's proprietary semantic technology was developed using 50+ combined years of research and development, together with the best university researchers, trained linguists and developers. It is uniquely tailored for social media and the hospitality industry, detecting positive, negative and neutral sentiments for various categories within review text. TrustYou's semantic technology works in 23 languages with an accuracy of around 90% for most languages.

### Midwest

Reviews from cities in East North Central (Wisconsin, Michigan, Illinois, Indiana, Ohio) and West North Central (Missouri, North Dakota, South Dakota, Nebraska, Kansas, Minnesota, Iowa)

### Northeast

Reviews from cities in New England (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut) and the Mid-Atlantic (New York, Pennsylvania, New Jersey)

### Reviews

Number of reviews found across all global review and social media sites for that particular hotel group during the quarter

### South

Reviews from cities in the South Atlantic (Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida), East South Central (Kentucky, Tennessee, Mississippi, Alabama) and West South Central (Oklahoma, Texas, Arkansas, Louisiana)

### TrustScore

The TrustScore is a global picture of what is being said about a hotel, boiled down into one simple score. It is based on all reviews written in 23 languages across 250+ review and social media sites worldwide. The score takes three main factors into account:

1. **All individual reviews:** By taking every individual review into account, we can get to the most objective score possible. A site with more reviews will naturally have more impact on the TrustScore than sites with only very few. 2. **Sentiment:** TrustYou's semantic analysis algorithm is able to detect positive, negative and neutral sentiments written within each review. These sentiment scores are weighted into the TrustScore 3. **Date:** Calculations go back two years, with older reviews carrying much less weight than newer ones to ensure that the score always represents the best up-to-date reputation of a hotel.

### West

Reviews from cities in the Pacific (Alaska, Washington, Oregon, California, Hawaii) and Mountain (Idaho, Montana, Wyoming, Nevada, Utah, Colorado, Arizona, New Mexico)

## About the Authors

### Donna Quadri-Felitti

Donna Quadri-Felitti is a Clinical Associate Professor of Hospitality and Tourism Management at New York University, [Preston Robert Tisch Center for Hospitality, Tourism, and Sports Management](#) in New York City. Donna completed her Ph.D. at Iowa State University in Hospitality Management where she received a USDA-funded Sustainable Community Development grant for her research in wine tourism destination marketing and the experience economy. She was named one of the [Top 25 Extraordinary Minds in Hospitality and Tourism Sales and Marketing by Hospitality Sales and Marketing Association International](#) for the year 2012. Donna has earned certifications as a Hospitality Educator from [American Hotel & Lodging Association](#), a Hospitality Digital Marketer from [Hospitality Sales and Marketing Association International](#), and wine captain from the Sommelier Society of America.

### Margaret Ady

Margaret Ady is based in Munich, Germany where she serves as Marketing Director at [TrustYou](#), an online reputation management company specializing in the hospitality industry. She graduated from the University of Southern California with degrees in Economics and Psychology, and where she was awarded the Annenberg Communications Pathway Grant in 2004 for her research in new technology and its impact on health and healthcare decision-making. Margaret has extensive experience in research, marketing and branding strategy, having served in leadership positions at The Walt Disney Company (where she was appointed to the company's Peer Advisory Board), and The Oprah Winfrey Network. She has also provided research and strategic consulting services to 20th Television (Fox), Nielsen and many other companies in FMCG/Entertainment/IT industries.