

75,000 Surveys Reveal the Personal Values that Motivate People to Choose a Hotel

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The Valuegraphics Database is a random stratified statistical representation of the population of Canada and the US, currently comprised of 75,000 surveys that delve into respondent wants, needs and expectations relating to 40 core values and 340 questions about life. If you are not a data geek, that's a stupendously boring first sentence.

But I wanted you to know about the intense geekiness of the Valuegraphics Database so you would understand that the *Valuegraphics Industry Profile (VIP)* that follows is NOT just another opinion. It's data. It's based on fact.

The Lodging industry in all price categories is going through a period of disruption, with huge forces at play. New technologies, mergers, acquisitions, online competition, Airbnb, new travel behaviours, new types of travelers: these are not small adjustments to an ecosystem. This is even more than disruption.

This is reinvention.

Which means there are consultants. Lots of consultants. And complex secondary research. And studies based on smaller samples. And conferences and events and courses and seminars. And reports from well-meaning industry insiders about pricing models. And books and magazines galore. It must feel hard sometimes to stay on top of all that information, especially when much of it is conflicting.

In the midst of that chaos it's valuable to step back and ask our consumers, directly, what they value, want, need and expect. And that's where the 75,000 surveys in the Valuegraphics Database come in. We've done that work of asking hotel guests those questions for you. What we found, follows.

Please note that what follows is not secondary research we found in other journals or reports, and it's not based on using information from other surveys. We don't think in terms of stereotypes, nor do we believe that psychographics or demographics have much to do with how people behave.

On the other hand, this is a general industry profile for all people who stay in all kinds of hotels, except that we broke the findings into budget vs. a category we refer to as "fancy." We will leave it to you to decide which of the various sub-sub-sub segments of the hotel universe your property fits into and how much of the information in this report is relevant. We are not trying to be all things to all people, we are just trying to point out some fundamental difference between people who think they are budget hotel people, and people who think they are fancy hotel people. In our methodology, it is up to them to decide where they fit in any given classification system.

Before we begin, you should know that all our work is based on one simple fact, on which social scientists, psychologists and consumer behaviour experts agree: *what we value determines what we do*. So we built the Valuegraphics Database to profile the shared *personal values* (not the more vague social values that some researchers use) of an entire target audience for anything anywhere in Canada and the USA. Once you know the shared *personal values* of your target audience you will know what motivates them, and you can influence them to do the things that you would like them to do.

One last point of clarification before we begin. A *Valuegraphics Industry Profile* like the one you are reading now is a very different thing than a *Custom Valuegraphics Profile*. The custom profiles we are commissioned to extrapolate from the Valuegraphics Database provide precise data points from our dataset for a specific

product, service, brand, location, idea, campaign etc and etc. An industry profile however like this one on Hotel Guests, provides general highlights that apply across the board for all participants in a vertical.

Think of it this way: the industry profile is a useful and pragmatic story about fancy cakes. It's full of broadly applicable information that holds true regardless of what kind of cake you want to know about, as they all share several characteristics and can be talked about together. It helps to know how they differ from pies, or pastries for example. But if you are specifically interested in learning all there is to know about Kransekake, Vineterta, or Battenberg Cake, you will need to find a more detailed source of information and possibly a very specific recipe for the cake in question. Fortunately, the Valuegraphics Database is an encyclopedia of cake information as well as recipes, and we can help you find exactly the information you need on the cake you are focused on learning more about.

But for now, on with the show!

Valuegraphics data analysis at the industry level reveals that there are four distinct Valuegraphics Profiles for what we will refer to as *People Who Stay In Hotels*.

1. Those who prefer budget hotels, we will call *The Budget Preferred*.
2. Those who consider budget hotels a necessity we will shorthand as *The Budget Necessary*.
3. Those who can afford fancier, more luxurious hotels will be *The Fancy Affordable*.
4. And those who can't afford fancy hotels but stay in them anyway? *The Fancy Overdrawn*.

For each of the profiles that follow, I've done my best to capture what makes the group unique, and to describe their core values. One or two of these groups will likely sound most familiar to you as the primary patrons of your hotel; in other words you will probably have some gut feel as to which is which.

I've also tossed in a few thought-starters for each group, which may or may not be possible to execute in your situation, given the physical, budgetary and staffing restraints that you face. But that's ok, because the real reason for including these random ideas is just to show you how the ideas are related to the profiles. You need to come up with your own ideas now, based on the reality of your particular situation.

The Budget Preferred

The Budget Preferred are those who could probably afford to stay somewhere more expensive, but choose not to. They resemble our League of Workaholics Valuegraphics Archetype and are motivated to make their hotel decisions by their desire for financial security.

They work very hard, these people, with one eye on the future, and they don't see any value in spending on unnecessary things such as fancy hotels. As far as they are concerned a hotel serves a simple purpose: it is a place to stay. It is not an experience to enjoy or something they want to talk about and share with their friends later.

So, they will take the time to research their options and make sure they are getting the best deal within a self-imposed budget range.

They highly value family, and financial security as mentioned above, and are not big on owning a lot of things. They are not hardcore anti-materialists as represented by the Anti-Materialists Guild Valuegraphics Archetype, but a sort of lite version of thereof.

We also found a small group of environmentalists in the data for this profile, but it is unclear if that has an impact on their hotel preferences.

As the Budget Preferred are travelling on business, a large and comfortable workstation in each room, with an ergonomic chair and plenty of outlets to charge multiple devices could be enough to make the value equation

swing in your favour.

Speaking from experience, I will never return a second time to any hotel where desks are desks in name only, perhaps suitable to perch at uncomfortably for two minutes while making a phone call, but nothing more. I want plenty of desktop real estate to spread out across, great lighting, and above all, an adjustable chair.

Ample office supplies, maybe even an in-room printer (or one on each floor) would likely be welcome. It costs next to nothing to make sure each room is equipped with post-it notes, paper clips, a decent pen, and a few sheets of printer paper.

Because of their anti-materialist tendencies they will respond well to clean spaces, empty shelves, and perfectly-executed simplicity. There should be a sturdy place for a suitcase to sit on, open, and remain accessible. There must be a USB plug beside the bed to charge their phone, which is also their alarm clock. Don't spend money on fancy lamps and decorative objects. Focus on the bones of your property and the rooms, not the lipstick.

WiFi must be free. Period. For the business traveller, there is nothing more annoying than being charged 20\$ a day to stay connected when they know it costs virtually nothing to provide the service. And since this group of people place a very high value on family, consider offering one free long-distance call home at the end of each day, as a powerful way to communicate to prospects that we know business travel means being away from the ones they love. Very few people will take you up on it. But the story impact of a free call home to your family is huge.

Finally, perhaps your rooms could be categorized based on intended length of stay. Hanging around a hotel for one night would lend itself to a different set of needs and wants from a room than if a guest was making it his or her remote office for a week or more.

The Budget Necessary

The Budget Necessary folks only travel when they absolutely need to. It's not something they do often, and it causes them some amount of anxiety.

They are the most likely to be willing to share a room, and least likely to seek out well-known flags or branded properties. They will stay in locations that offer the bare minimum in terms of services and amenities and are likely to consider it just a place to sleep. It is not valued at all as part of their trip.

It's going to be pretty hard to help these guests when their only concern is price. This is the group that, in my humble opinion, the hotel industry might easily choose to avoid. Who wants to race to the bottom? It's traditionally not profitable, and it's no fun. But new technologies and the flexibility of this audience when it comes to their primary value of price may actually provide some opportunities.

These people most closely resemble the Valuegraphics Archetype called The Royal Order of the Overdrawn, and have high debt loads. They highly value family, friendships and relationships, and are very focused on just meeting their basic needs. The ideal place for these people that would make them most happy? Sleeping on the sofa at a family members house. For free.

Micro-apartments are becoming hugely popular, and combined with the well-established tiny house movement could provide inspiration in the hotel industry. Technologies, FF&E, and the sustainability movement mean suppliers are thinking smaller and smaller every day. Further inspiration comes from Japan, where living comfortably if not luxuriously in small spaces has been a fact of life for generations. Japanese pod hotels spring to mind, but are not the only example of rethinking space, service, amenities and correspondingly, price.

These folks will consider everything and anything a fancy extra, and one that they resent paying for. One solution might be to give them the control over what they pay for and what they don't. Do you want an extra

pillow? A bottle of water? A coffee machine? Extra towels? All of it is possible, but each costs a dollar or two. That way, they can have exactly what they want and not feel like they are paying for anything they don't.

If you can afford to offer them a further discount on an overnight stay if they opt out of maid service, they'll take you up on that offer. Sometimes discounting through opting out feels like a bigger saving.

And finally, while it might be a bit of a kooky idea, think about reinventing the old 1950's automats.

The automat is an idea from over 100 years ago: essentially a room full of vending machines. Today these machines have become very sophisticated and you can offer a wide array of hot and cold food (and even merchandise) without the need to take up much space or employ any staff. Done right, with a few chairs and tables, the automat takes the place of both a restaurant and room service, and perhaps even rules out the need for a kitchen of any sort if the contract to replenish the vending machines can be outsourced.

The Japanese, of course, are all over this idea already. Their subways and train stations are full of incredibly advanced vending machines. And I'm quite certain affordable versions are available and sitting in a warehouse somewhere in Tokyo harbour, ready to ship to your property and install.

The Fancy Affordable

This is the group that every hotel in the mid-to-upscale categories would like to attract. If you want to chase The Fancy Affordable don't let the name of the group make you think they are looking for affordability. These folks can afford to stay in higher-end hotels (hence their moniker) and are not so concerned about price. Consequently, because they know they are paying a premium, they are very particular about things like service, quality of everything, recognition, and etc.

Of the four groups, the Fancy Affordable are the most likely to be very chatty about where they stay. They will create word-of-mouth awareness about your property through social media, and one-on-one with everyone who will listen to them in person too. This is a blessing and a curse.

You will love it when these people are singing your praises online. But they will be equally vocal very quickly, and in a very public way, if their eggs are cold or they didn't get the room they asked for when they reserved just 24 hours before arrival.

The Fancy Affordable choose where to stay partly because of personal preferences, but also because they want others to know where they are staying. So the more your brand aligns with their self-perception, the better. And it's not just about prestige. Some of these folks wouldn't be caught dead staying at an uber-luxury chain hotel because it is a chain of hotels, while others want the reassurance of standards that a chain provides across all the properties in the portfolio. For this to show up so prominently in our Valuegraphics data at even this cursory layer of analysis shows how entrenched the branded vs. unbranded debate has become. Consumers are choosing sides.

They will be very motivated by material possessions, and they consider a fancy hotel stay to be a 'thing' rather than an experience. What can you do to make that 'objectness' even more palpable? How can you help them let everyone know how proud they are to have stayed at your property, without looking like they are advertising on your behalf? I admit to having small luggage tags attached to my baggage, supplied by a particular hotel flag under the guise of letting the staff know when I arrive that my bags need to be handled with priority status. I suspect, however, the budget for these comes from the marketing department, not operations, as they are mostly manufactured to remind me, and point out to my associates on my behalf, that I am platinum prestige member of their loyalty club.

These guests will be somewhat loyal, as long as everything is to their liking, and especially if they are made to feel recognized and receive the attention they crave at a particular hotel. They are the people who love to say

"When I go to New York I always stay at..." and the best way to earn that loyalty is by knowing who they are, and making them feel special.

Fancy Affordables place a high value on material possessions, and also family, although without a custom profile for a particular property it's hard to say how much family impacts this particular purchase decision. It will vary from one property to the next.

As the Fancy Affordables are using the hotel brand as a way to badge themselves, and are very interested in other people knowing where they are staying, it would make sense to make it as easy as possible for them to do this.

Consider a line item in your budget for items that you fully expect will be *accidentally* taken home when the guest departs.

However be careful, as they will not want to knowingly become walking billboards. A free T-Shirt emblazoned with the hotel logo handed to them as a gift on departure is not going to get worn. It feels cheesy, unless of course it was acquired as a courtesy item in the fitness center, in which case it will get worn in fitness centers and golf clubs around the world when guests return home. But a free T-shirt handed out at the front desk? That's too obviously about marketing.

I was at a small upscale boutique hotel in New York. In each room there was a very inexpensive nylon backpack with a large logo, and a note encouraging you to use it as a day bag for exploring the city, to call the kitchen if you wanted sandwiches for sustenance whilst on your urban safari, and encouraging you to take the backpack home, compliments of the hotel.

I still have that backpack and use it from time to time because it rolls up very small and is easy to travel with. Imagine how their competitors must feel when I'm sitting in their lobby wearing a logo the size of a bread plate on my backpack. Smart move.

Think about where the Instagram and Facebook photos will be taken in your common area spaces. Make it a task for someone on your team to sort out good lighting and interesting backgrounds, with appropriate seating in several spots throughout the property. You don't want it to be obvious, as these guests will want to discover the "perfect spot for a photo" on their own, but think about how you can plant those perfect spots for them to stumble across unexpectedly.

You can't spend enough on a CRM system, and proper staff training for the Fancy Affordables. The old tricks like greeting each guest at the door by name when they first arrive, and throughout their stay as they come and go, are skills that make a doorman or a concierge worth his weight in gold. But how can the housekeeping staff do the same? Could the waiters also have this information as part of their daily briefing? Better still, remembering any special requests the guest had during a previous visit, and ensure those requests are attended to on future visits without the guest even asking. I must fit into this category, at least sometimes, because I have another personal story to share.

While working on my latest book I stayed in several hotels at several points in the process. I find hotel rooms are a great place to focus and think big thoughts because there are so few distractions. The staff at one hotel in particular, the Fairmont Palliser in Calgary, always remembered I was working on a book and liked a quiet room far away from the elevators, and that I don't like to be interrupted by housekeeping services. They also remembered that I had left a bottle of whiskey behind from previous visits, and had it set up in the room with a glass and bucket of ice when I arrived. Not just any whiskey. My bottle. Perfect.

The Fancy Overdrawn

The Fancy Overdrawn are experience-chasers. They are unlikely to be loyal to one flag or one location because they are collecting hotel stays, and want to try the newest, the coolest, or the most famous hotel wherever

they go. I refer to them as the Fancy Overdrawn because unlike the Fancy Affordables they really can't afford to travel this way but they don't care. The experience is so important to them they are willing to put it on a credit card if they must, and worry about paying for it later.

The data is a bit unclear about this next point: it presents a chicken or egg scenario. It does look like this group might choose where they are going based on what hotel they can stay at while there. The hotel, it seems, may in some cases be more important than the destination. No sense going to Lake Como unless you can stay at the Villa d'Este.

However, the data could just as easily be pointing to the inverse in this case, which can be one of the downfalls of searching through sociological data for industry profiles. What we can tell is that there is something important going on around this data point, so it's worth knowing about.

These guests have a kind of hotel #FOMO, and want to make sure they are not missing out on the newest and coolest hotel, or elaborately renovated property that only a few people have seen. In fact, the stories other people tell about the hotels they have experienced (either online on travel sites, or in person) are the number one influencer for this group. As a hotel owner or manager it's your job to make sure your guests have plenty to talk about, as it will impact your sales numbers in a very direct way.

The Fancy Overdrawn have core values that align with the Valuegraphics Archetype called The Adventure Club, and as such crave unique experiences, opportunities to express themselves creatively, and anything that will contribute to their own personal growth.

It's only a hunch, and would vary from property to property, but the lack of loyalty within this group might be addressed by keeping things in your hotel ever-evolving. It's the unique experiences that keep this audience loyal, so how can you be something new with every visit?

Maybe there is a lobby installation by a local artist that changes monthly. New menus to explore on a very frequent basis would be a safe bet. Programming and activity schedules that make every stay feel like a new experience would be appealing. I was on the phone this morning with someone who had just checked into a hotel in California, who was very excited to tell me all about the local craft beer tasting in the lobby when he arrived.

Could you offer a daily tour of some part of your city, some building or little-known retail strip, on a first-come-first-served basis, and choose a new destination every week? If you did, you'd be curating your destination/location for them, and if they stay somewhere else on their next visit they will be missing out on what could be another very appealing adventure only available through you.

Unlike the Fancy Affordables looking for *spaces* in the hotel for social media posts, this group will be more interested in Instagrammable and Facebookable *moments*. They will want to have memories to share that are about *doing things*, not simply being places.

A final thought. With large flat screen digital TV's becoming less of a capital expense as their prices decline, why not offer a selection of video art, so that guests can decide what is hanging on the wall while they are in residence? Black television screens can dominate a room, and the ability to choose what artwork to view (there is video art for all tastes, budgets, and levels of connoisseurship) would be an appealing experience for this audience. The bigger the video image the better, because size is directly related to the suitability for sharing on social media.

Bonus profile: The Swingers

Of interest is a fifth group that shows up in the Valuegraphics Database consisting of those who don't regularly fit into another group. These are the "depends on the situation" hotel guests.

They may choose a budget option if there is no reason to be in a more upscale property, or they may decide on an upscale property for a specific occasion. It is difficult to group these people into one profile without working on a specific Custom Valuegraphics Profile. Still, it is worth noting that at least a third of the population doesn't fit into one of the main groups and could essentially be considered up-for-grabs if you do a great job of being a great hotel that delivers on one or more Valuegraphics Profiles as mentioned herein. It also means, inversely, that a full two thirds of all hotel decisions are made by people in one of the four profiles we've discussed. That's a lot of heads on beds, with only four primary categories to consider.

Conclusion

Regardless of the hotel category, some combination of the above values will be in play.

What is most interesting is what is NOT in this report. If something didn't get mentioned, it's because it is not important enough to be mentioned. If you think about the tsunami of ideas and strategies swirling around regarding What Hotels Should Do, finding out that things are quite simple and straightforward feels to me like a breath of fresh air.

For example, while a specific property might be all about local food prepared with foraged ingredients from the surrounding countryside, for the industry in general local food offerings are not mentioned. Local food as a value, want, need or expectation didn't have an appreciable showing across the 75,000 surveys about 40 values and 340 questions in the database.

The values outlined in these few pages are the statistically accurate baseline requirements for any industry player to get be in the game today. If you put my few brainstorming ideas aside, none of this is about opinions or guesswork, just facts and data. It also seems to me to be great news that the values we extrapolated for the hotel industry – even at this superficial view from 40,000 feet – point to programs and services that are not difficult or complex to embrace.



Mr. Allison

David Allison began working in advertising agencies in 1985 and helped motivate audiences for some of the world's largest brands. In 2016 he sold the ten-year-old marketing agency he had built and launched, DAVID ALLISON INC., a small global advisory firm. Mr. Allison spent the next two years building Valuegraphics, the first-ever big-data tool that can profile the shared values of entire target audiences and replace outdated demographic profiling models. Today, his company creates custom Valuegraphics Profiles from the ever-evolving database and consults with organizations who are interested in the full scope of what Valuegraphics can tell them about the audiences they want to motivate more often. David Allison can be contacted at 604-786-0152 or david@valuegraphics.com

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