



2012 Travel Breakout Sessions



2012
**SERVICE
EXCELLENCE
SUMMIT**

Agenda

- **Welcome and Introductions**
- **Market Outlook and Trends**
 - **Bobby Bowers, Senior Vice President, STR**
- **Impact of Generation and Income on Hotel Satisfaction**
 - **Weihua Huang, Ph.D., Senior Manager, J.D. Power and Associates**
- **Networking Lunch**
- **Customer Research Insights—Cornell Center for Hospitality Research**
 - **Rohit Verma, Ph.D., Professor and Executive Director, The Center for Hospitality Research, Cornell University**
- **Mystery Shopping**
 - **Geoff Prince, Senior Product Manager, J.D. Power and Associates**
- **Mid-Point Insights and the 2012 North America Hotel Guest Satisfaction Index Study**
 - **J.D. Power and Associates team**





Market Outlook and Trends

**2012
SERVICE
EXCELLENCE
SUMMIT**

Bobby Bowers
Senior Vice President
Smith Travel Research



Impact of Generation and Income on Hotel Satisfaction

Demographics

Weihua Huang, Ph.D.
Senior Manager
Corporate Research

2012
**SERVICE
EXCELLENCE
SUMMIT**

Networking Lunch

12:00pm - 1:00pm





Customer Research Insights—Cornell Center for Hospitality Research

**2012
SERVICE
EXCELLENCE
SUMMIT**

Rohit Verma, Ph.D.
Professor and Executive Director
The Center for Hospitality Research,
Cornell University



Mystery Shopping

.....

Competitive Intelligence

Geoffrey Prince
Sr. Product Manager
Product and Strategy



**2012
SERVICE
EXCELLENCE
SUMMIT**

Networking Break

2:30pm - 3:00pm





2012 Hotel Insights and Discussion

**2012
SERVICE
EXCELLENCE
SUMMIT**

**J.D. Power and
Associates Team**

Agenda

- 2012 Mid-Point Results
- 2013 NAGSI Changes
- Staff and Index Model
- Club Studies
- General Information





Mid-Point Results



2012
**SERVICE
EXCELLENCE
SUMMIT**

The background of the slide features a silhouette of two people climbing a large rock formation. One person is standing on the peak, holding a rope, while the other is on a lower ledge, also holding a rope. The sky is a mix of blue and orange, suggesting a sunset or sunrise. A dotted line is visible in the middle of the slide.

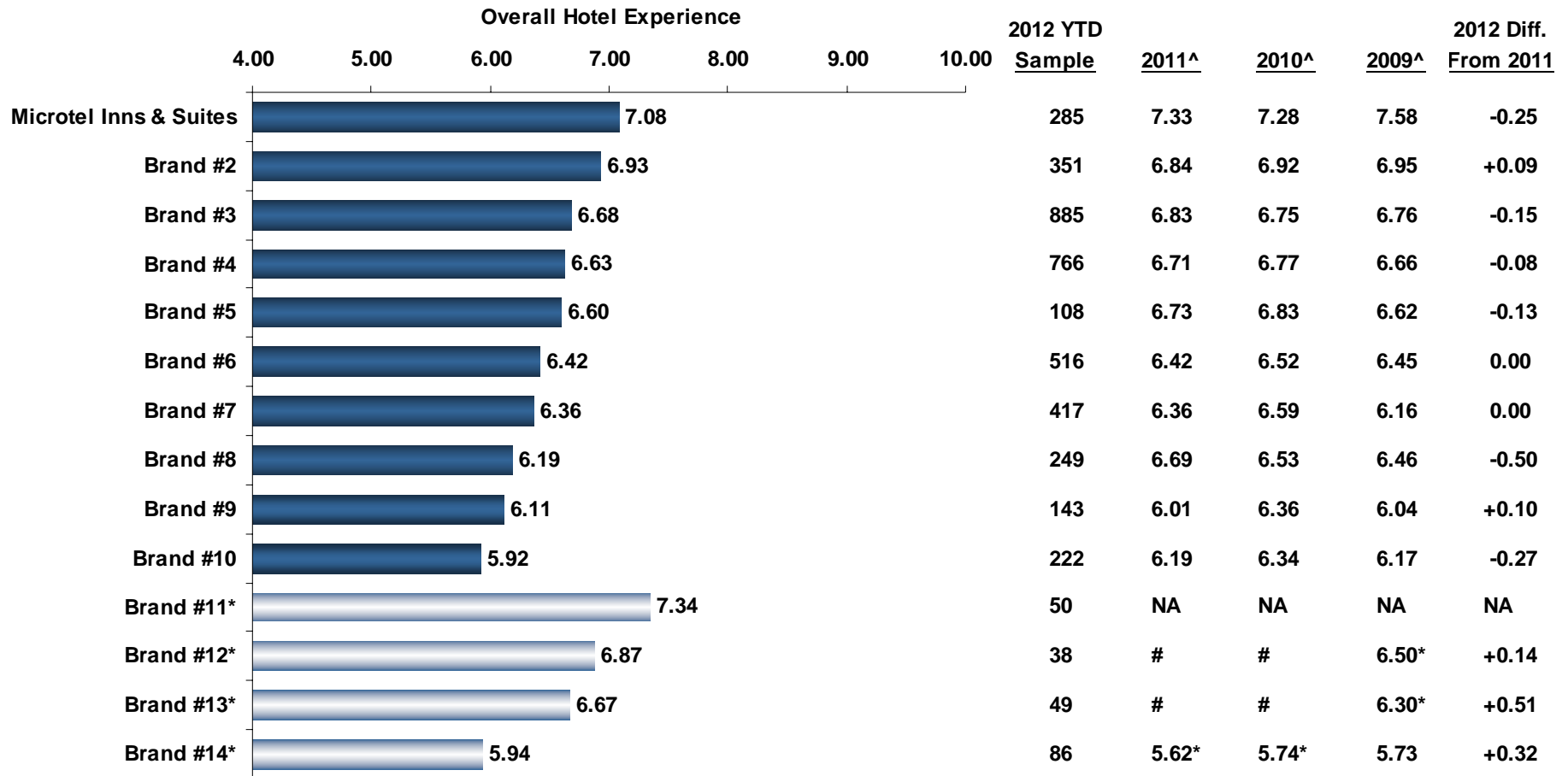
2012 Midyear Insights

- Half way through fielding 33,737 completes have been collected
- Satisfaction for the industry has declined slightly from 2011
 - Costs & Fees shows significant decline
 - Internet connection shows significant decline
 - Restaurant/Bar/Lounge shows significant decline
 - Guest Room showing significant improvement
- New staff diagnostics show interesting findings – a full staff model will be developed at the close of field in June 2012
- The segment leaders, along with the relative brand rankings, are reasonably consistent to last year as of now



2012 Midyear Insights – Economy/Budget

2012 Year-To-Date Performance - Economy/Budget Segment^



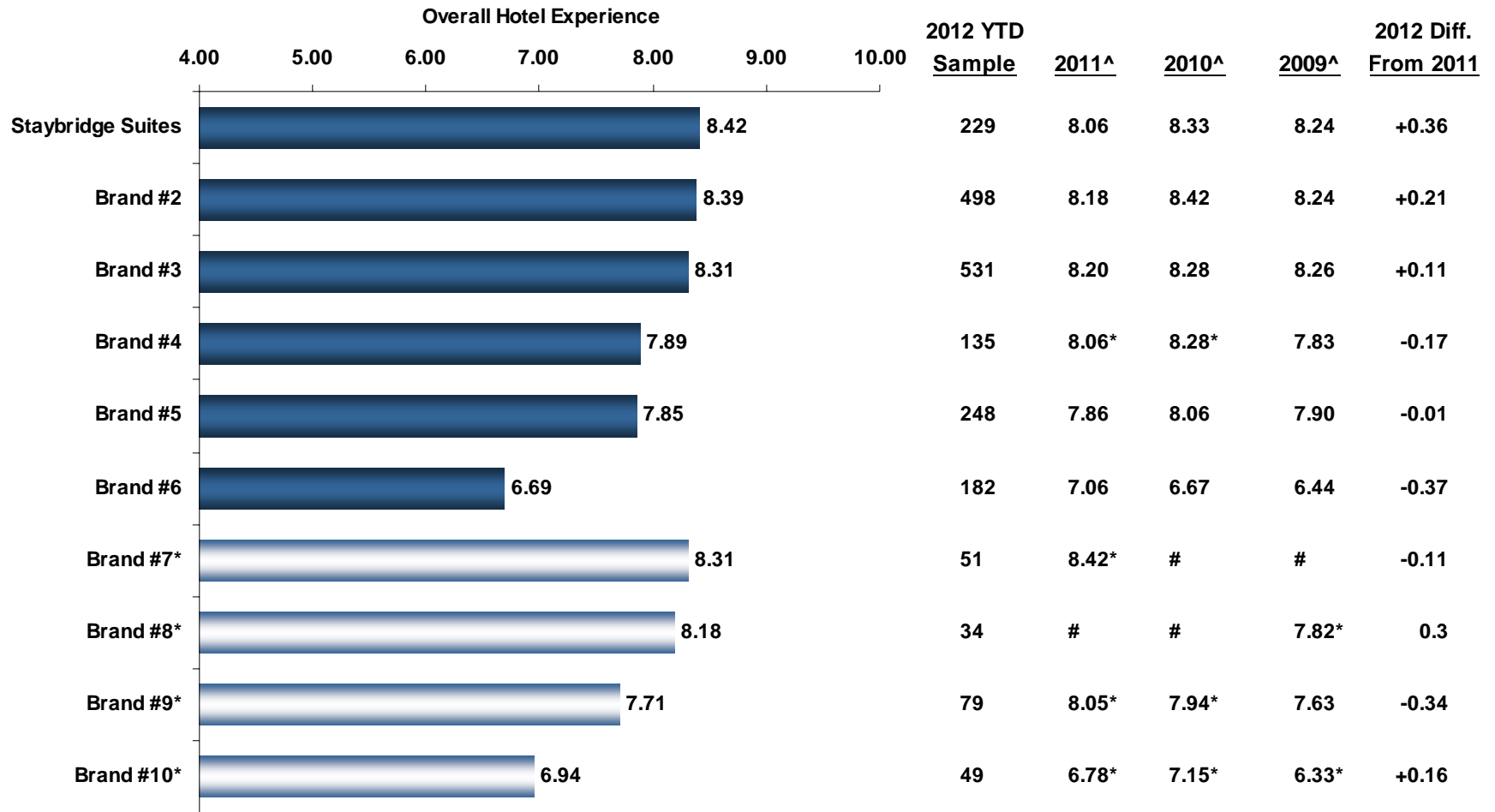
* CAUTION: Small sample (n = 30-99).

CAUTION: Insufficient sample (n = 1-29).

^ Mid-Point Data.

2012 Midyear Insights – Extended Stay

2012 Year-To-Date Performance - Extended Stay Segment^



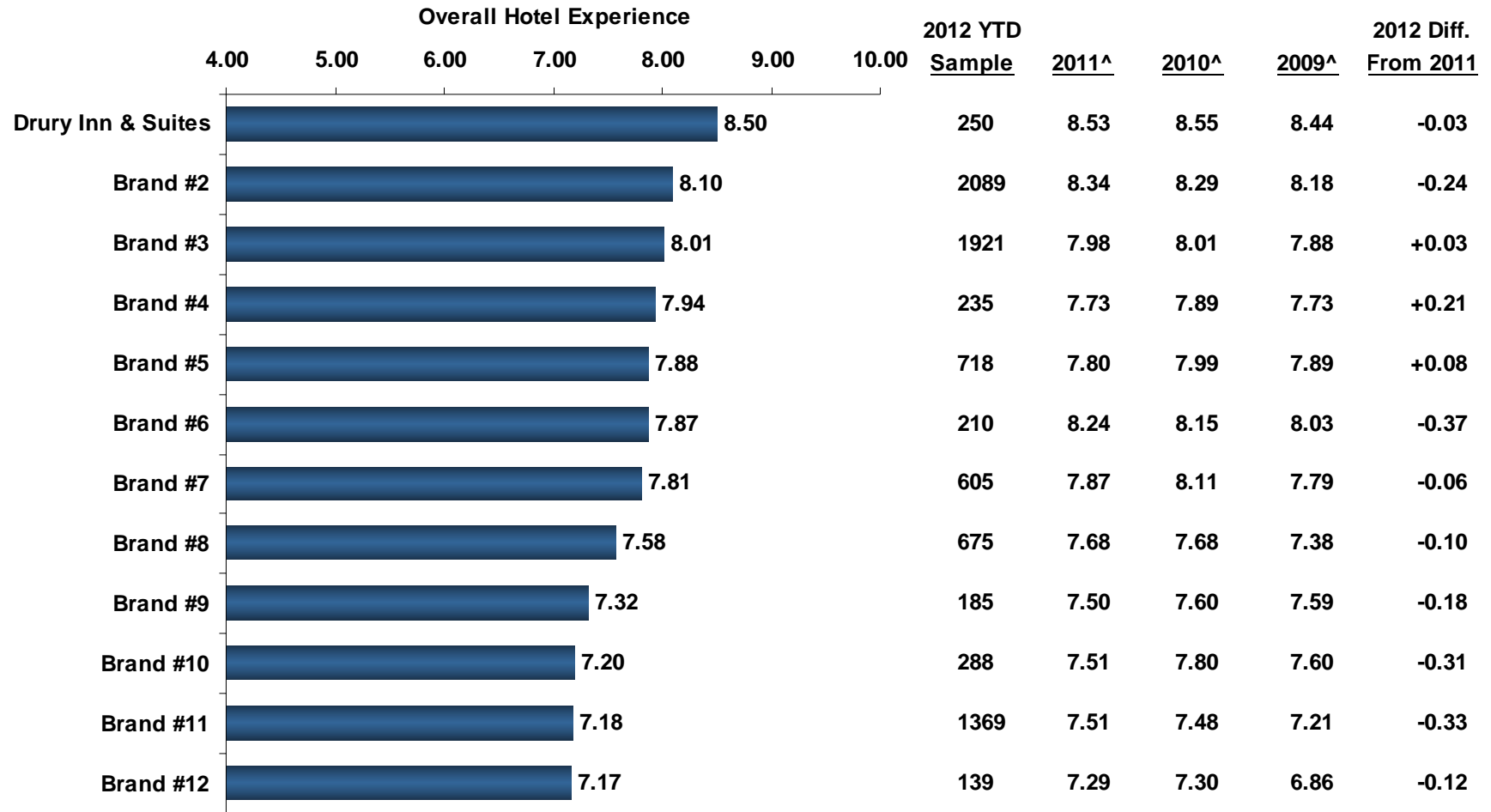
* CAUTION: Small sample (n = 30-99).

CAUTION: Insufficient sample (n = 1-29).

^ Mid-Point Data..

2012 Midyear Insights - MSLS

2012 Year-To-Date Performance - Mid-Scale w/o Food & Beverage^

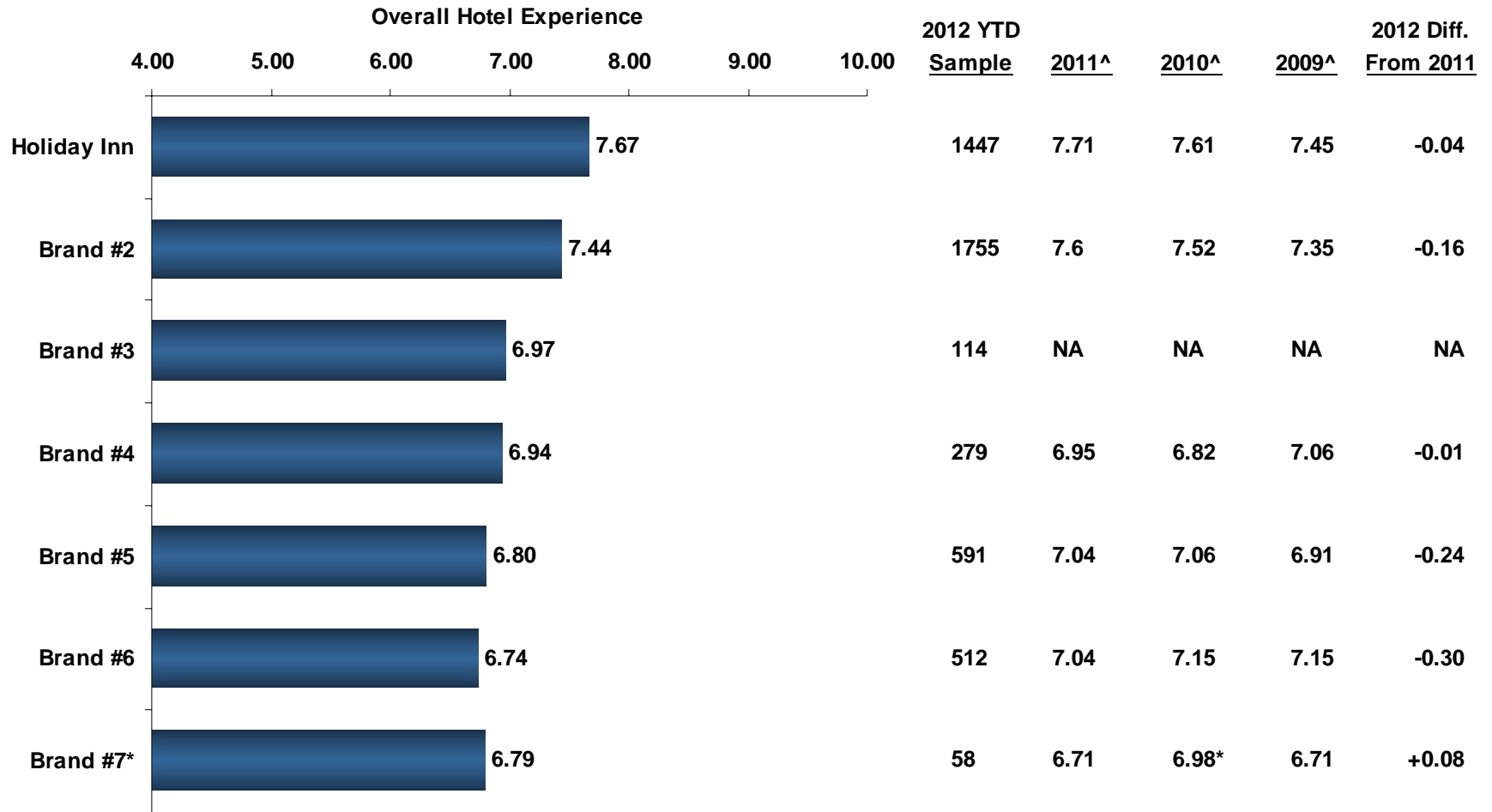


* CAUTION: Small sample (n = 30-99).

^ Mid-Point Data.

2012 Midyear Insights – MSFS

2012 Year-To-Date Performance - Mid-Scale w/ Food & Beverage Segment[^]

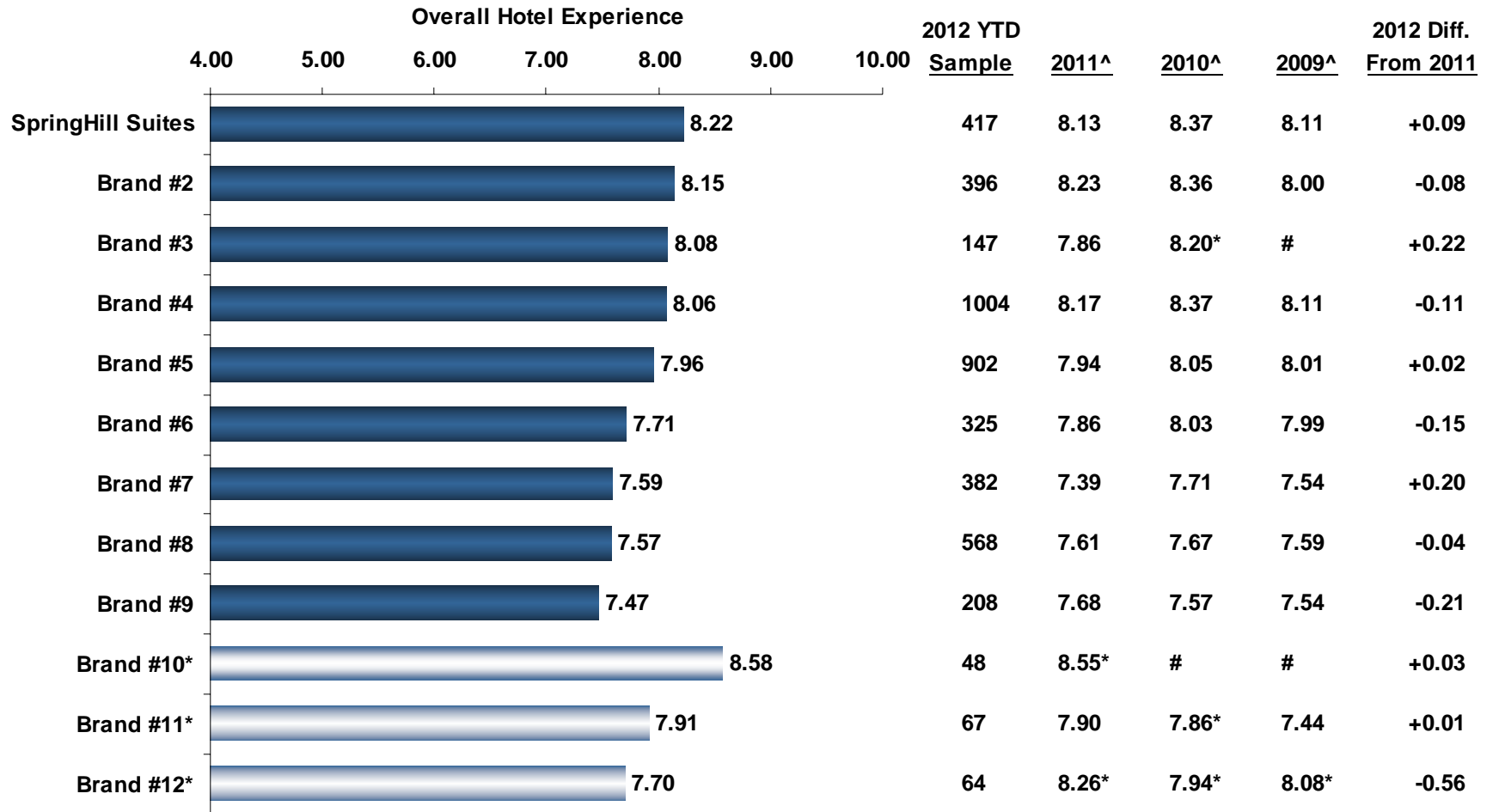


* CAUTION: Small sample (n = 30-99).

[^] Mid-Point Data.

2012 Midyear Insights - Upscale

2012 Year-To-Date Performance - Upscale^



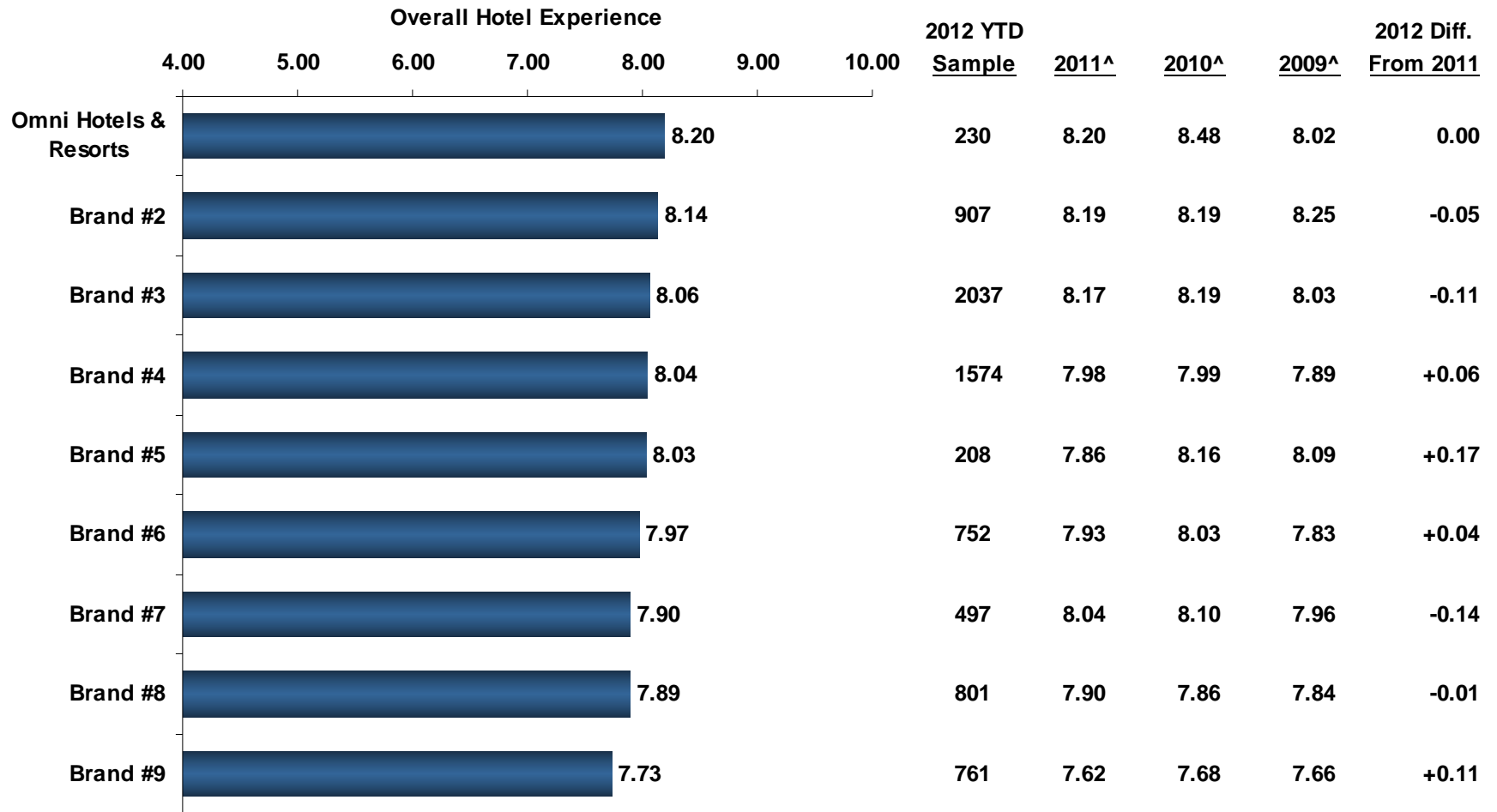
* CAUTION: Small sample (n = 30-99).

CAUTION: Insufficient sample (n = 1-29).

^ Mid-Point Data.

2012 Midyear Insights – Upper Upscale

2012 Year-To-Date Performance - Upper Upscale Segment^

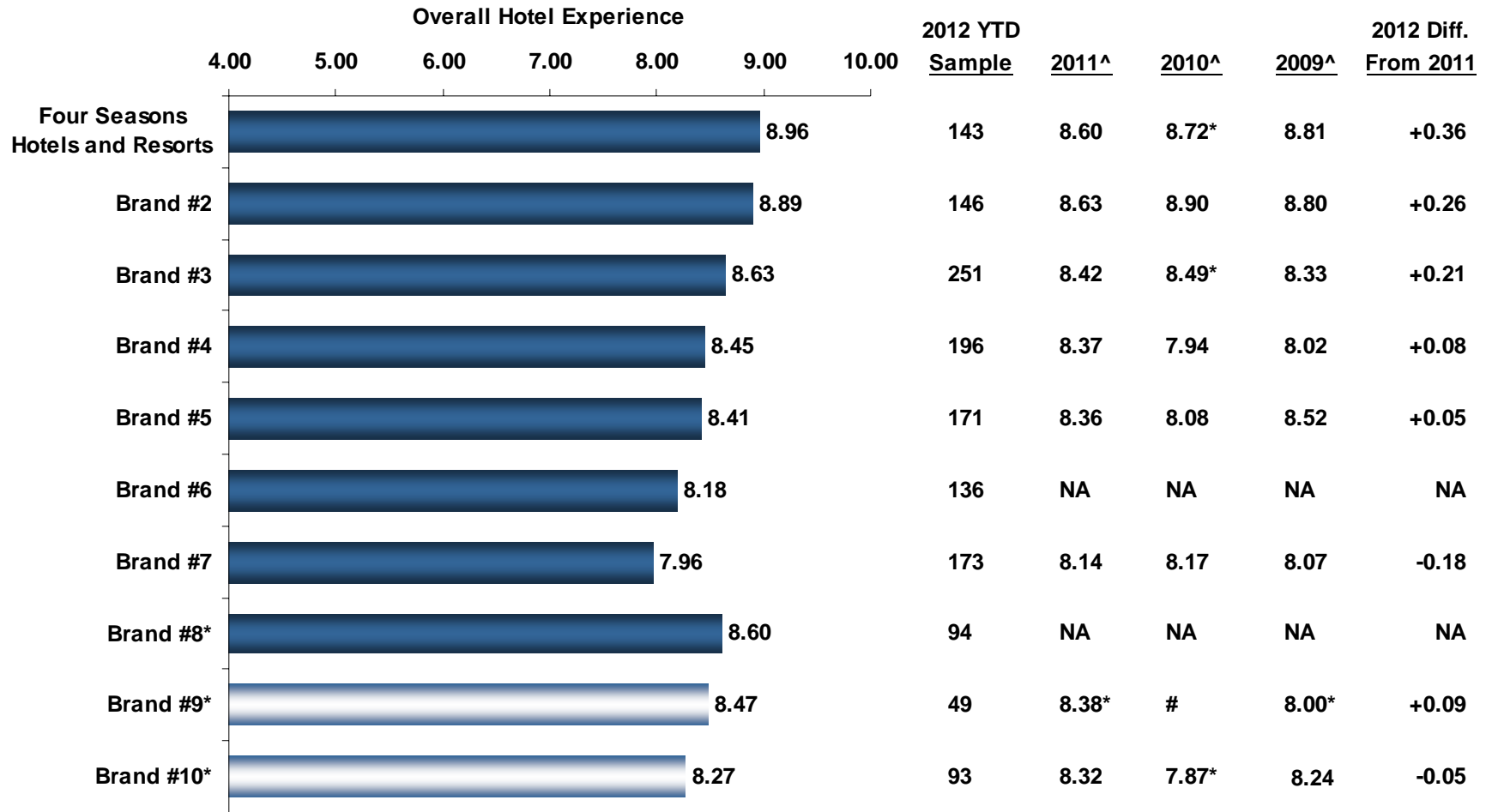


* CAUTION: Small sample (n = 30-99).

^ Mid-Point Data.

2012 Midyear Insights - Luxury

2012 Year-To-Date Performance - Luxury Segment[^]



* CAUTION: Small sample (n = 30-99).

CAUTION: Insufficient sample (n = 1-29).

[^] Mid-Point Data.

2012 Midyear Insights – Staff Interactions

2012 Staff Interactions - Total Industry^

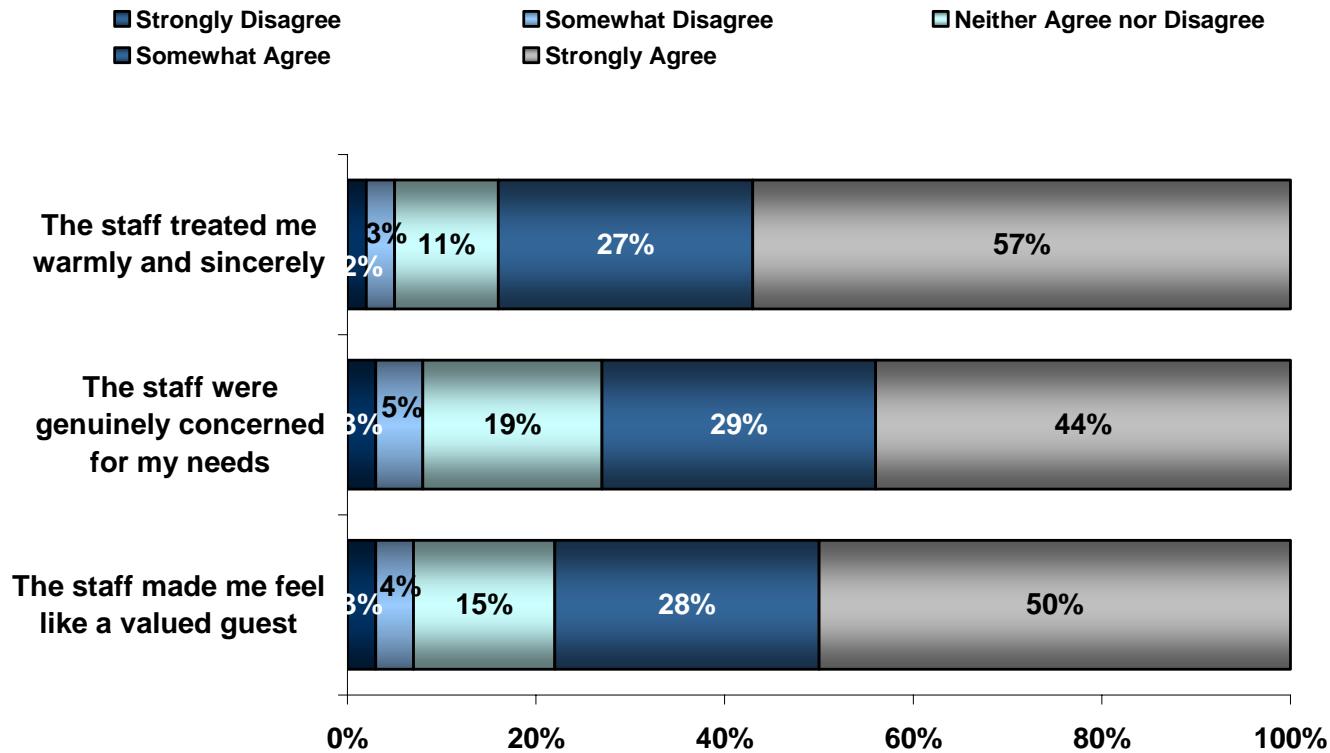
| Staff Members: | Staff Dressed Professionally (%Yes) | Staff Addressed You by Name (%Yes) | Staff Asked if Could Assist with Anything Else (%Yes) | Staff was Difficult to Understand (%Yes) |
|---------------------------|-------------------------------------|------------------------------------|---|--|
| Check-in/front desk staff | 97% | 60% | 87% | 5% |
| Door/bell staff | 96% | 21% | 66% | 3% |
| Concierge | 95% | 33% | 78% | 4% |
| Waiter/waitress | 95% | 18% | 74% | 4% |
| Breakfast attendant | 93% | 12% | 58% | 4% |
| Housekeeper | 93% | 11% | 49% | 11% |
| General manager | 92% | 47% | 74% | 6% |
| Other staff | 84% | 16% | 49% | 5% |
| None of the staff | 3% | 37% | 14% | 90% |

^ Mid-Point Data.



2012 Midyear Insights – Staff Behavior

2012 Staff Interactions - Total Industry^



^ Mid-Point Data.

2012 Midyear Insights – Property Level Information

- Property Level information will be available in July at the study publish for most hotels in the United States
- mTAB will allow users to access property level information cuts of data by all the various measures in the 2012 study
- Customer Verbatim File will also have property level information linked to diagnose and fix problems
- This is still a brand level study and awards continue to be based on brand overall





2013 NAGSI Changes

**2012
SERVICE
EXCELLENCE
SUMMIT**

2013 NAGSI Study Changes

- Quarterly Index
- Segmentation and thresholds
- Segmentation and brand inclusion
- Questionnaire changes
 - Deletions
 - Additions
- Discussion/feedback

Quarterly Index – 2013 Study

- Each quarter the Index scores will be generated for each brand using the prior year's Index weights (2012) to help better gauge overall performance
- At the end of the year – the Index weights will be run on all of 2013 data to see if any adjustments need to be made to the model before final data is released
- All brands included in the study will receive a quarterly notification of relative performance beginning in Fall 2012



2013 Sample Plan Changes

- Small Changes to Upscale and Economy/Budget Segment Thresholds
 - Upscale property threshold increased from 20 to 30
 - MSFS room count threshold increased from 7,500 to 9,500
 - Economy/Budget property threshold increased from 150 to 160 and number of rooms from 5,500 to 8,000
 - Extended Stay split into two segments

| Luxury | Upper Upscale | Upscale | MSFS | MSLS | Economy/ Budget | Upper Extended Stay | Extended Stay |
|-----------------------|------------------------|------------------------|-------------------------|-------------------------|-------------------------|------------------------|------------------------|
| 6 Props OR 1500 Rooms | 30 Props OR 7500 Rooms | 30 Props OR 4000 Rooms | 100 Props OR 9500 Rooms | 100 Props OR 7500 Rooms | 160 Props OR 8000 Rooms | 35 Props OR 4000 Rooms | 50 Props OR 5000 Rooms |

2013 – Extended Stay Changes

- Extended Stay will be broken into an Upper Extended Stay and Extended Stay Segmentation
 - STR classifications, ADR, and cross-shopping patterns used to segment
 - There will be a highest ranked brand in each segment announced in July 2013



Extended Stay Segmentation: 2013 Study

Extended Stay

- Homestead Studio Suites
- Candlewood Suites
- Extended Stay America
- Extended Stay Deluxe – new to 2013
- Intown Suites
- Mainstay Suites (not rank eligible)
- Studio 6
- Suburban Extended Stay Hotels
- Towneplace Suites
- Value Place

Upper Extended Stay

- Hawthorne Suites By Wyndham
- Homewood Suites
- Hyatt House
- Residence Inn
- Staybridge Suites



Luxury Segmentation: 2013 Study

- Conrad (not rank eligible)
- Fairmont Hotels & Resorts
- Four Seasons Hotels and Resorts
- Grand Hyatt (combined with Park Hyatt for ranking)
- InterContinental Hotels & Resorts
- JW Marriott
- Loews Hotels
- Mandarin Oriental
- Park Hyatt Hotels (combined with Grand Hyatt for ranking)
- Sofitel
- St. Regis Hotels & Resorts
- The Luxury Collection
- The Ritz-Carlton
- W Hotels
- Waldorf Astoria



Upper Upscale Segmentation: 2013 Study

- Doubletree
- Embassy Suites Hotels
- Hilton Hotels & Resorts
- Hyatt Hotels and Resorts
- **Kimpton (new to 2013)**
- Le Méridien Hotels and Resorts (not rank eligible)
- Marriott Hotels & Resorts
- ~~Millennium Hotels and Resorts (no longer collecting)~~
- Omni Hotels & Resorts
- Renaissance Hotels & Resorts
- Sheraton Hotels & Resorts
- Westin Hotels & Resorts



Upscale: 2013 Study

- Aloft
- Best Western Premier (not rank eligible) – New to 2013
- Cambria Suites (not rank eligible)
- Courtyard
- Crowne Plaza Hotels & Resorts
- Delta Hotels
- Four Points by Sheraton
- Hilton Garden Inn
- Hotel Indigo
- Hyatt Place
- Radisson Hotels & Resorts
- SpringHill Suites
- Wyndham Hotels & Resorts



MSFS Segmentation: 2013 Study

- **Best Western (combined with Best Western Plus for ranking)**
- **Best Western Plus (combined with Best Western for ranking) – new to 2013**
- **Clarion**
- **Holiday Inn**
- **Howard Johnson (formerly Howard Johnson Hotels/Plaza)**
- **Quality**
- **Ramada (combined with Ramada Plaza for ranking) – formerly Ramada Inn**
- **Ramada Plaza (combined with Ramada for ranking)**
- ~~**Red Lion (no longer collecting)**~~
- **Wyndham Garden Hotels (not rank eligible)**



MSLS Segmentation: 2013 Study

- AmericInn
- Baymont Inn & Suites
- Comfort Inn
- Comfort Suites
- Country Inns & Suites
- Drury Inn & Suites
- Fairfield Inn
- Hampton Inns (Combined with Hampton Inns & Suites for ranking)
- Hampton Inns & Suites (Combined with Hampton Inns for ranking)
- Holiday Inn Express
- La Quinta
- Ramada Limited
- Sleep Inn
- Wingate Inn



Economy/Budget Segmentation: 2012 Study

- ~~America's Best Inns & Suites (no longer collecting)~~
- Americas Best Value Inn
- ~~Budget Host Inn (no longer collecting)~~
- ~~Budget Suites of America (no longer collecting)~~
- ~~Country Hearth Inn (no longer collecting)~~
- Days Inn
- Econo Lodge
- Howard Johnson Express (formerly Howard Johnson Express/Inns)
- ~~Jameson Inn (no longer collecting)~~
- Knights Inn
- Microtel Inn & Suites
- Motel 6
- ~~Red Carpet Inn (no longer collecting)~~
- Red Roof Inn
- Rodeway Inn
- Super 8 Motel
- Travelodge



2013 Questionnaire Changes - Deletions

H8. How would you best describe this hotel location?

- (1) Downtown/City
- (2) Suburban
- (3) Airport
- (4) Resort
- (5) Convenient to highway/interstate

H15. When you made your reservation, did you pay in full at the time of booking?

- (1) Yes
- (0) No

H16. When you made your reservation, were you offered any special/discounted rates (i.e., Internet/web price)?

- (1) Yes
- (0) No

[ASK H17 IF H10 = 1 OR 2]

H17. During your phone reservation, did they offer any of the following? (Mark all that apply)

- (1) Package options
- (2) Discounts
- (3) Entertainment options
- (4) Dining options
- (5) Smoking/Non-smoking room
- (6) Internet
- (7) Room upgrades
- (97) Other, please specify: _____
- (99) None **[EXCLUSIVE]**



2013 Questionnaire Changes - Deletions

H37. Was your stay personalized (e.g. pillow type, newspaper preference)?

- (1) Yes (0) No

[SKIP H24 IF H22 = 3]

H24. At check-in, did the front desk offer...?

- | | |
|--|--|
| <input type="checkbox"/> (1) Map of the area | <input type="checkbox"/> (5) Hotel map |
| <input type="checkbox"/> (2) Car service | <input type="checkbox"/> (6) Wake up call |
| <input type="checkbox"/> (3) Entertainment options | <input type="checkbox"/> (99) None of the above [EXCLUSIVE] |
| <input type="checkbox"/> (4) Dining options | |



2013 Questionnaire Changes - Deletions

Amenities

H83. Which hotel services/amenities were offered during your stay? Please rank up to your top three that are most important to you? **[RANDOMIZE]**

| Amenity | Mark if Offered H83a | Rank Top 3 H83b |
|---|-------------------------------------|--------------------------|
| ▼ Flat Panel TV/HDTV/Plasma | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Complimentary wireless Internet access/WIFI | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Pillow top mattress | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Coffee/tea maker | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Refrigerator/mini fridge | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Complimentary breakfast | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Bathtub | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Bedding and pillow choices | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Free parking | <input type="checkbox"/> | Ranking (1-3) |
| ▼ In-room hair dryer | <input type="checkbox"/> | Ranking (1-3) |
| ▼ In-room iron/iron board | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Complimentary water | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Complimentary newspaper of choice | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Turndown service | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Wake up call/alarm [SHOW IN EU/NA VERSIONS ONLY] | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Cosmetic amenities | <input type="checkbox"/> | Ranking (1-3) |
| ▼ Air conditioning [SHOW IN EU/NA VERSIONS ONLY] | <input type="checkbox"/> | Ranking (1-3) |
| ▼ None [EXCLUSIVE] | <input type="checkbox"/> | |



2013 Questionnaire Changes - Additions

- “Pet Friendly” – added as reason for selecting hotel

H13. Why did you select [HOTEL]? (Mark all that apply)

- | | | |
|---|--|--|
| <input type="checkbox"/> (1) Lower price | <input type="checkbox"/> (9) Corporate policy | <input type="checkbox"/> (15) View |
| <input type="checkbox"/> (2) Good customer service | <input type="checkbox"/> (10) Package deal | <input type="checkbox"/> (16) Room size (spacious room) |
| <input type="checkbox"/> (3) Convenient location | <input type="checkbox"/> (11) Online review (i.e., Trip Advisor) | <input type="checkbox"/> (17) Internet access |
| <input type="checkbox"/> (4) Convenient process | <input type="checkbox"/> (12) Hotel amenities offered | <input type="checkbox"/> (18) Renovated |
| <input type="checkbox"/> (5) Past experience | <input type="checkbox"/> (13) Only available hotel | <input type="checkbox"/> (19) Pet friendly |
| <input type="checkbox"/> (6) Reputation | <input type="checkbox"/> (14) "Green" hotel (environmentally-friendly) | <input type="checkbox"/> (97) Other, please specify: _____ |
| <input type="checkbox"/> (7) Recommendation | | <input type="checkbox"/> (99) Don't know [EXCLUSIVE] |
| <input type="checkbox"/> (8) Rewards program member | | |



2013 Questionnaire Changes - Additions

- Importance of adequate plugs for electronics in room

Guest Room

H200. Were there a sufficient number of electrical outlets/plugs in the following areas of your room?

| Area | Yes (1) | No (0) | N/A (99) |
|------------------------------|--------------------------|--------------------------|--------------------------|
| Desk/Workspace area | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Nightstand/Bed area | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bathroom area | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other, please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

C



2013 Questionnaire Changes - Additions

- Distinguishing between Restaurant and Bar/Lounge
- Healthy Choices and F&B

[SKIP H51 THROUGH H57 IF HOTEL ≠ LX, UU, UP, MSFS]

H51. Which of the food & beverage services did you use? (Mark all that apply)

- (1) Restaurant **[ONLY IF HOTEL= LX, UU, UP, MSFS]**
- (3) Bar/lounge **[ONLY IF HOTEL= LX, UU, UP, MSFS]**
- (2) Room service **[ONLY IF HOTEL= LX, UU, UP, MSFS]**
- (99) None of the above **[EXCLUSIVE, SKIP TO H58]**

H52a. Were there healthy food & beverage offerings on the menu?

| | Yes | No |
|--|--------------------------|--------------------------|
| A. Restaurant/bar/lounge [ONLY IF H51 = 1 and/or 3 (Restaurant/bar/lounge)] | <input type="checkbox"/> | <input type="checkbox"/> |
| B. Room Service [ONLY IF H51 = 2 (Room Service)] | <input type="checkbox"/> | <input type="checkbox"/> |

H52b. How important are healthy food & beverage options to you?

- (1) Not at all important
- (2) Not very important
- (3) Somewhat important
- (4) Very Important



2013 Questionnaire Changes - Additions

- Cleanliness of Restaurant/Bar/Lounge

Food & Beverage: Restaurant

[SKIP H53 AND H54 IF H51 ≠ 1 and/or 3 (Restaurant/bar/lounge)]

H53. Thinking about your restaurant/bar/lounge experience, how would you rate the...

| [RANDOMIZE] | Unacceptable | | | Average | | | Outstanding | | | N/A | |
|---------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | 10 |
| A. Variety of menu choices | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B. Quality/taste of food and beverage | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C. Ambiance (atmosphere) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D. Courtesy of staff | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E. Timeliness of your order | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F. Cleanliness of area | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



2013 Questionnaire Changes - Additions

■ Importance of Internet and Connecting Devices

H201. What type(s) of device(s) did you connect to the Internet with during your stay? Mark all that apply.

- (1) Laptop computer
- (2) Tablet (iPad, Galaxy, etc.)
- (3) Smartphone
- (97) Other, please specify: _____

H63. Where did you connect to the Internet? (Mark all that apply)

- | | |
|--|---|
| <input type="checkbox"/> (1) Hotel lobby | <input type="checkbox"/> (4) Restaurant/Bar/Lounge |
| <input type="checkbox"/> (2) Business center | <input type="checkbox"/> (5) Meeting room/Conference center |
| <input type="checkbox"/> (3) Guest room | <input type="checkbox"/> (97) Other, please specify: _____ |

H202. What type(s) of activities did you need to connect to the Internet for? (Mark all that apply)

- (1) Work related activities
- (2) Checking personal e-mail
- (3) Browsing various sites
- (4) Downloading or streaming movies
- (5) Downloading or streaming music
- (6) Playing video games
- (97) Other, please specify: _____



2013 Questionnaire Changes - Additions

- Importance of Problem Resolution to Satisfaction

H203 Why did you rate Hotel's Overall Resolution of your Problem(s) the way you did?

| | |
|--|-------------------|
| <input type="checkbox"/> | I have no comment |
|  VERBATIM | |

2013 Questionnaire Changes - Additions

■ Rewording Loyalty Question

Loyalty

H79. Assuming you are in this area again, how likely are you to stay at this specific [HOTEL] again?

- | | |
|---|---|
| <input type="radio"/> (1) Definitely will not | <input type="radio"/> (3) Probably will |
| <input type="radio"/> (2) Probably will not | <input type="radio"/> (4) Definitely will |

H80. How likely are you to recommend this specific [HOTEL] to a friend, relative or colleague?

- | | |
|---|---|
| <input type="radio"/> (1) Definitely will not | <input type="radio"/> (3) Probably will |
| <input type="radio"/> (2) Probably will not | <input type="radio"/> (4) Definitely will |

H81. Assuming that a [HOTEL] is in the area, the next time you need to stay at a hotel, how likely are you to stay at this hotel chain?

- | | |
|---|---|
| <input type="radio"/> (1) Definitely will not | <input type="radio"/> (3) Probably will |
| <input type="radio"/> (2) Probably will not | <input type="radio"/> (4) Definitely will |



2013 Questionnaire Changes - Additions

- New verbatim at survey close

H400. Did **[HOTEL]** have anything unique to offer you, compared to other similar hotels, if yes what was it?

| | |
|---|-------------------|
| <input type="checkbox"/> | I have no comment |
|  VERBATIM | |





Staff and Index Model



2012
**SERVICE
EXCELLENCE
SUMMIT**

The background of the slide features a silhouette of two mountain climbers on a rocky peak. One climber is standing on the highest point, holding a rope and looking out over the horizon. The other climber is standing on a lower ledge, also holding a rope and looking up. The sky is a mix of blue and orange, suggesting a sunset or sunrise. A horizontal dotted line is positioned below the main title.

Staff Service - Your Feedback

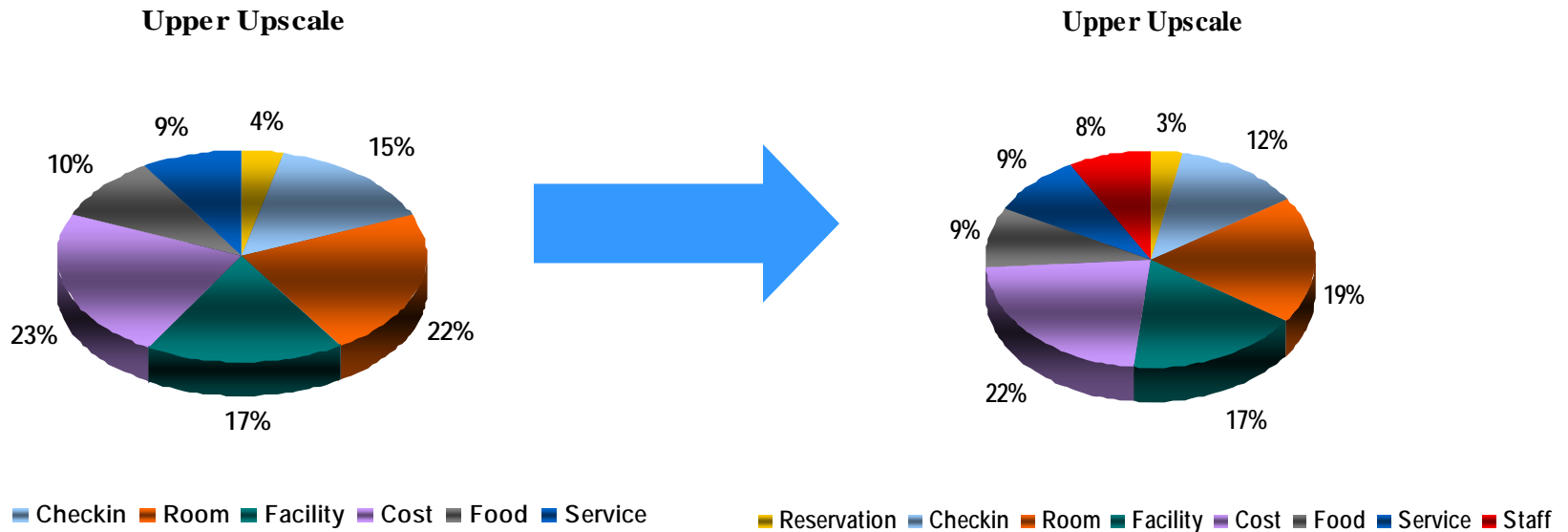
What We Heard

- Hotel staff service is an important part of the guest experience that was not being sufficiently captured in the historical Hotel Guest Satisfaction survey
- There is desire to include a staff factor in the overall index model



What We Did

- Create a pseudo “staff factor” by pulling out and averaging staff items in existing factors (check-in/out, F&B, etc.)



- Across segments, the importance weight of “staff factor” varies from 8% to 10%
- The model fit (R2) for factors that the staff items are pulled out decreases across all segments, **decreasing the predictability** of the model



New Segment Index Weights with “Staff Factor”

| | ECONOMY/ BUDGET | EXTENDED STAY | LUXURY | MSFS | MSLS | UPPER UPSCALE | UPSCALE |
|------------------|--------------------|------------------|--------|------|------|------------------|---------|
| Reservation | 2% | 3% | 3% | 3% | 3% | 3% | 3% |
| Check-in/out | 9% | 9% | 14% | 11% | 10% | 12% | 12% |
| Guest Room | 24% | 24% | 19% | 22% | 20% | 19% | 20% |
| Food & Beverage | 8% | 8% | 7% | 9% | 12% | 9% | 8% |
| Hotel Services | 6% | 9% | 10% | 8% | 8% | 9% | 8% |
| Hotel Facilities | 18% | 15% | 19% | 16% | 15% | 17% | 17% |
| Costs & Fees | 23% | 23% | 19% | 23% | 23% | 22% | 22% |
| Hotel Staff | 9% | 10% | 10% | 8% | 8% | 8% | 10% |

2012 Survey Staff Updates

H34. During your stay at [HOTEL], besides the check-in/front desk staff, which of the following hotel staff members, if any, did you interact with? (mark all that apply)

- | | |
|---|--|
| <input type="checkbox"/> (1) Door/bell staff [ONLY IF HOTEL=LX, UU, UP] | <input type="checkbox"/> (5) Housekeeper |
| <input type="checkbox"/> (2) Concierge [ONLY IF HOTEL=LX, UU, UP] | <input type="checkbox"/> (6) General manager |
| <input type="checkbox"/> (3) Waiter/waitress [ONLY IF HOTEL=LX, UU, UP, MS] | <input type="checkbox"/> (7) Other staff |
| <input type="checkbox"/> (4) Breakfast attendant | <input type="checkbox"/> (99) None [EXCLUSIVE] |

H100. Please enter the following information about the staff members you interacted with. (Must mark at least one bubble per column)

| Staff Member | Was the staff dressed professionally? (Mark if YES) | Did the staff address you by name? (Mark if YES) | Did the staff ask if there was anything else they could assist you with? (Mark if YES) | Did you have any difficulty understanding the staff? (Mark if YES) |
|--|--|---|---|---|
| Check-in/front desk staff [ASK ALL RESPONDENTS] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Door/bell staff [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Concierge [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Waiter/waitress [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Breakfast attendant [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Housekeeper [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| General manager [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other staff [ASK IF SELECTED III H34] | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ["NONE" ARE MUTUALLY EXCLUSIVE, CANNOT CHECK ANY OF THE BELOW IF THE CORRESPONDING COLUMN ABOVE HAS ANYTHING CHECKED] | <u>None of the staff was dressed professionally</u> | <u>None of the staff addressed me by name</u> | <u>None of the staff asked if there was anything else then could assist with</u> | <u>I did not have any difficulty understanding any of the staff</u> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



2012 Survey Staff Updates

H101. Using a scale of strongly disagree, somewhat disagree, neither agree nor disagree, somewhat agree or strongly agree, please indicate your agreement with each of the following statements in relation the staff experience throughout your stay.

| [RANDOMIZE] | Strongly Disagree (1) | Somewhat Disagree (2) | Neither agree nor disagree (3) | Somewhat Agree (4) | Strongly Agree (5) |
|--|---------------------------------|---------------------------------|--|------------------------------|------------------------------|
| A. The staff treated me warmly and sincerely | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| B. The staff were genuinely concerned for my needs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| C. The staff made me feel like a valued guest | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



2012 Midyear Insights – Staff Interactions

2012 Staff Interactions - Total Industry^

| Staff Members: | Staff Dressed Professionally (%Yes) | Staff Addressed You by Name (%Yes) | Staff Asked if Could Assist with Anything Else (%Yes) | Staff was Difficult to Understand (%Yes) |
|---------------------------|-------------------------------------|------------------------------------|---|--|
| Check-in/front desk staff | 97% | 60% | 87% | 5% |
| Door/bell staff | 96% | 21% | 66% | 3% |
| Concierge | 95% | 33% | 78% | 4% |
| Waiter/waitress | 95% | 18% | 74% | 4% |
| Breakfast attendant | 93% | 12% | 58% | 4% |
| Housekeeper | 93% | 11% | 49% | 11% |
| General manager | 92% | 47% | 74% | 6% |
| Other staff | 84% | 16% | 49% | 5% |
| None of the staff | 3% | 37% | 14% | 90% |

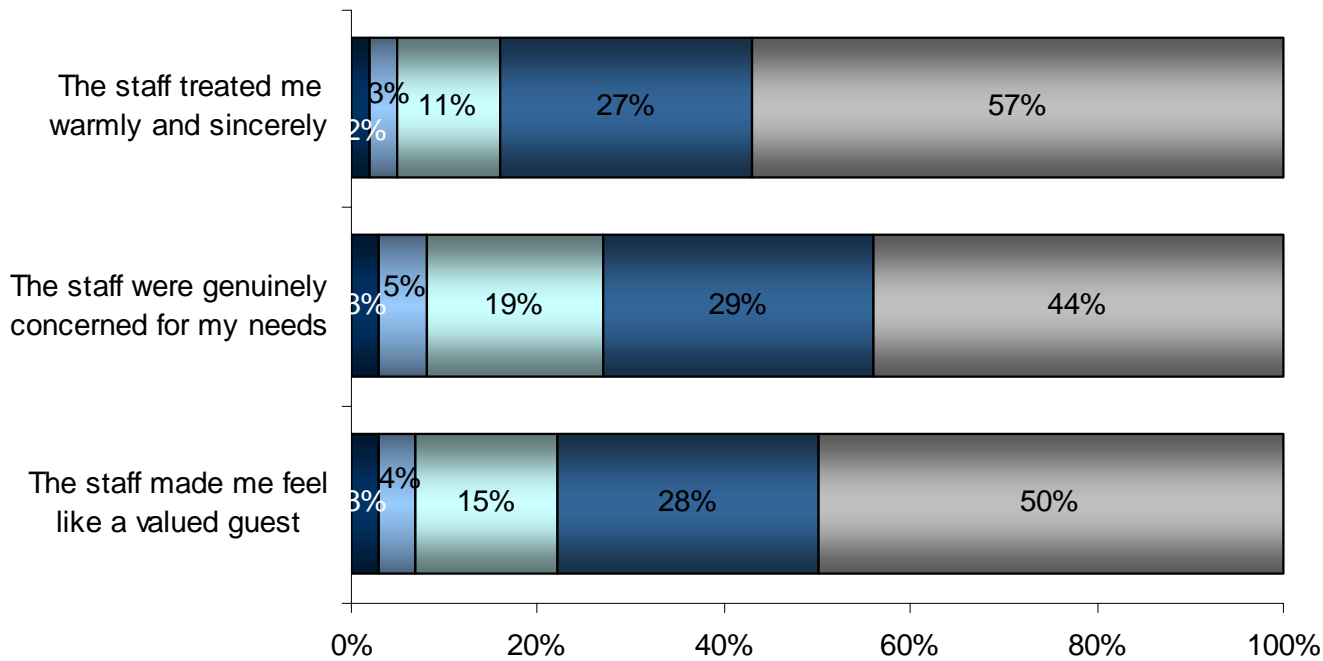
^ Mid-Point Data.



2012 Midyear Insights – Staff Behavior

2012 Staff Interactions - Total Industry[^]

■ Strongly Disagree ■ Somewhat Disagree ■ Neither Agree nor Disagree ■ Somewhat Agree ■ Strongly Agree



[^] Mid-Point Data.





J.D. POWER
AND ASSOCIATES®

Club Studies

**2012
SERVICE
EXCELLENCE
SUMMIT**

Club Studies Around the Globe

- J.D. Power and Associates is looking to create a benchmarking study in the Middle East and other markets (e.g. China, India) through the Use of Club Studies
 - Client supplied sample or data
 - Use of the global hotel questionnaire Index Model questions
 - Sharing data across clients at the Factor, Attribute, and Demographic level – all identifying Brand information will be removed and not available
 - Test Market 1 – UAE Market – Target Q1 2013



Club Study - UAE



- Create a UAE Luxury Benchmark for Hotel Clients
- Each client will give J.D. Power permission to use their attributes, factors, and basic demographic information and aggregate this across clients
 - All identifying brand information will be stripped and unavailable to competitors
- J.D. Power will run all compiled data through the Index Model process and create UAE Benchmarks for Overall Satisfaction and each of the Factor and attribute areas.
 - This will be conducted on a quarterly basis
 - Benchmark will be the Top 20% Average or Average overall, J.D. Power will work with clients to determine the best fit
- Deliverables
 - Respondent Level File with Index Scores and Attribute Scores and Demographics
 - Index Model Weights
 - Masked Property Rankings Overall and by Factor - Static GP Report

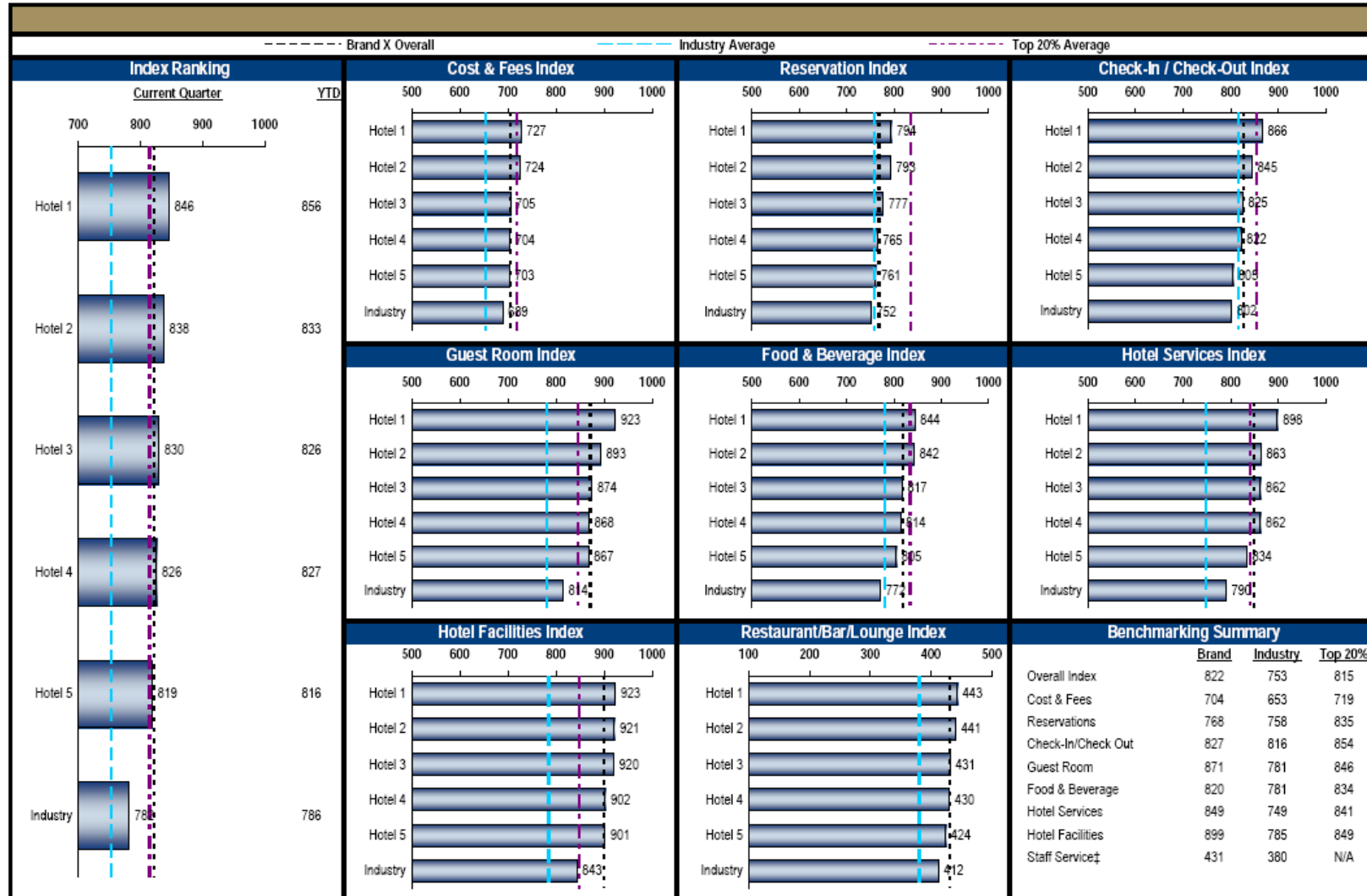


Masked Property Rankings Overall and by Factor - Static GP Report

Guest Satisfaction:
Comparative Report - UAE

Property Level Report

2012 Q1 and Q2 Data





General Information



2012
**SERVICE
EXCELLENCE
SUMMIT**

J.D. Power and Associates

High value return on your investment



- Syndicated benchmark studies
 - North America, Europe, Japan
 - Evaluating UAE and China
 - “Proprietary Oversample”
- Guest satisfaction tracking
 - Acutrend
 - Value-added strategic partner
- High value proprietary work
 - Thought leadership applied to solving your business needs
- Social media and text analytics
- Mystery Shop – Compare and Contrast



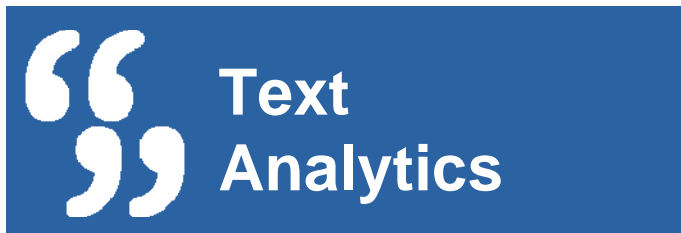
Discovery Zone Solutions



Solutions that enable you to measure quality and customer satisfaction in real time and compare the data against industry benchmarks



Collect and evaluate consumer sentiment in its natural form—unprompted—with solutions that integrate into your existing research and surpass basic monitoring tools



Analyze all of your unstructured text—gathered from any source—and provide actionable solutions and analyses



Methodical approach to evaluate your contact center and provide measureable, actionable analyses and customized recommendations



Discovery Zone Solutions



Mystery Shopping

Rigorous and comprehensive sales and service mystery shopping, observational audit, and compliance services



Microsites

Client-commissioned, online mini websites designed to highlight a company's performance in a J.D. Power syndicated study

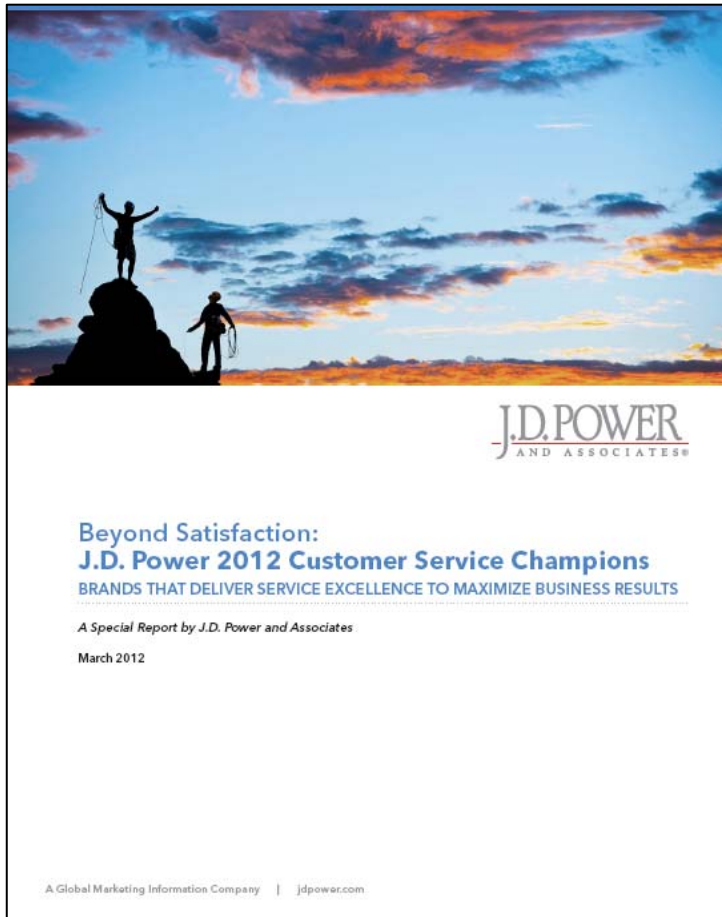


Digital Experience Evaluation

Usability insights and recommendations for improvement of websites and apps across digital platforms based on extensive research



2012 Customer Service Champions



- Customer Service Champions
- 50 brands across industries that demonstrate service excellence
- Announcement Wednesday evening at 7pm awards dinner
- Insights and best practice presentation around serving today's consumers
- Provided free to all attendees

Enjoy the rest of the conference!

Wednesday Afternoon/Evening

- Service Champion Cross-Industry Practices Discussion
- Networking Reception
- Customer Service Champions Spotlight Dinner

Thursday

- Keynote Speakers
- Panel Discussions

Anytime during the conference!

- Discovery Café



Thank You!

