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# Brand Equity Score™ Executive Report

FEBRUARY - APRIL 2025  
COMPARATIVE BRAND  
ANALYSIS

BENCHMARKING BRAND LEADERSHIP THROUGH INNOVATION, TRUST,  
PERCEPTION, AND REPUTATION



**measuredio.**  
a brand intelligence company



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# Airbnb vs. Vrbo

## A New Chapter in the Vacation Rental Rivalry

Few brand rivalries encapsulate the transformation of an industry quite like Airbnb and Vrbo.

What was once a comparison of features and price points has evolved into a high-stakes contest of trust, perception, and brand credibility.

**This report unpacks the competitive dynamics at the heart of the Airbnb vs. Vrbo brand narrative.**

It reveals what resonated, where each brand's reputation gained or faltered, and what lessons today's marketing and communications leaders can take away as they seek to navigate and lead in an increasingly crowded and competitive reputation landscape.





# Executive Summary

In Q2 2025, MeasuredI/O analyzed **40,000 high-reach earned media mentions from February - April** across Airbnb and Vrbo using the Brand Equity Score™ methodology.

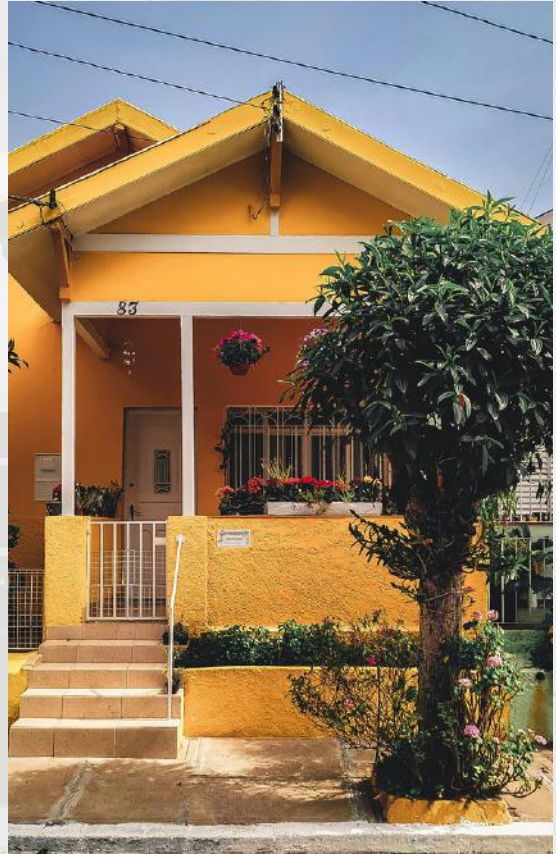
The goal: to assess how these two vacation rental giants are perceived — not just how much they're discussed, but what those conversations reveal about trust, innovation, and reputation.

The results reveal a nuanced portrait of two brands navigating distinct narrative paths:

**Airbnb excelled in Innovation and Perception, driven by global partnerships**, experiential campaigns, and a strong engagement footprint. However, this momentum was offset by trust concerns and regulatory challenges that continue to shape its reputation.

**Vrbo maintained a more stable trust profile, with a steady, partnership-driven narrative** that resonated in its core markets. Yet its muted engagement and limited visibility signal opportunities to scale its narrative through proactive media and innovation-led storytelling.

This analysis highlights a critical reality: **reputation is no longer built on volume alone, but on the depth, clarity, and consistency** of a brand's story. Brands that combine operational excellence with a clear, engaging narrative will be the ones that cut through the noise.





# Brand Comparison Overview

## Q2 2025 Brand Equity Score™ Head-to-Head

Dimension	Airbnb	Vrbo
Trust	Moderate	Strong
Perception	High	Moderate
Reputation	Mixed	Stable
Innovation	Strong	Moderate
Overall Score <small>(OUT OF 100)</small>	75	60

While **Airbnb** captured **headlines** and consumer attention through innovative campaigns, **Vrbo's more consistent, trust-first** approach provided stability in a competitive landscape demanding credibility and clarity.



- **Excelled in Innovation** and Perception, fueled by global campaigns and a diverse earned media presence.
- However, these gains were **offset by persistent trust challenges** and reputational risks stemming from regulatory pressures and inconsistent service experiences.
- **High-volume engagement underscored its influence**, but raised questions about long-term credibility and brand consistency.



- **Showed stability** and trustworthiness through partnership-driven narratives and operational clarity.
- While its **visibility was more limited**, the sentiment balance between positive and negative mentions was healthier.
- The brand's challenge lies in **amplifying its innovation** story and expanding its reach to strengthen its competitive edge in the fast-evolving vacation rental landscape.



# Brand Narrative and Strategic Position Breakdown







# Airbnb Brand Narrative and Strategic Position

## Airbnb – Innovative Leader Facing Trust Headwinds

In a 90-day period (Feb - Apr 2025), **Airbnb's brand equity was defined by bold innovation**, global reach, and cultural relevance. High-profile partnerships and experiential campaigns captured consumer attention, positioning Airbnb as a trailblazer in the vacation rental space. However, this high visibility came with heightened scrutiny, with **regulatory challenges**, service consistency concerns, and a growing proportion of negative sentiment threatening to erode trust.

### Strengths:

- Industry-leading innovation narrative, driven by global partnerships and experiential campaigns
- High media visibility and engagement levels, capturing consumer attention globally
- Strong perception as a trendsetter and innovator in the vacation rental space

### Challenges:

- High proportion of negative sentiment (4,325 negative vs. 1,740 positive mentions) signals trust and service consistency issues
- Regulatory pressures and scrutiny in key markets undermine consumer confidence
- Elevated media exposure amplifies both strengths and vulnerabilities, increasing reputational risk

Airbnb's continued leadership will depend on balancing bold innovation with operational credibility. Integrating proof points of service quality, regulatory compliance, and customer trust into its high-visibility campaigns will be essential to sustaining brand equity and consumer loyalty in an increasingly competitive landscape.



# Airbnb Brand Equity Score™ Breakdown + Key Mentions



## Summary:

Airbnb's Brand Equity Score™ profile for Q2 2025 showcases a brand with **strong innovation leadership and high consumer engagement**, yet tempered by challenges in trust and reputation. While it commands attention through bold experiential campaigns and cultural relevance, **Airbnb faces mounting regulatory and service consistency** pressures that threaten to erode trust. To maintain long-term brand equity, Airbnb must complement its innovation-driven narrative with operational excellence and transparent communication.

Dimension	Key Observations	Highlighted Mention
Innovation	Airbnb's innovation narrative was driven by global partnerships and experiential campaigns, capturing consumer attention but exposing reputational risks.	"Family sleep in campervan to 'escape rowdy Airbnb'" — <a href="#">BBC News</a>
Trust	High visibility amplified both trust and skepticism, with regulatory pressures and service consistency issues eroding confidence.	"Billionaire Airbnb Co-Founder Is Said to Take Leave of Absence" — <a href="#">NYT</a>
Perception	Strong global presence and media engagement shaped a bold perception as an industry innovator, balanced by critical narratives.	"Help! Our Paris Rental Apartment Was Robbed and Airbnb Did Nothing" — <a href="#">NYT</a>
Reputation	High engagement and cultural relevance bolstered Airbnb's reputation, but persistent trust challenges created reputational vulnerability.	"Hygiene warning to Spring Breakers renting Airbnbs with their pals" — <a href="#">Daily Mail</a>





# Vrbo Brand Narrative and Strategic Position

## Trusted and Steady, But Lacking Boldness

In Q2 2025, Vrbo's brand equity was anchored in consistent operational messaging and trust-driven partnerships. The company **maintained a stable trust profile** with balanced sentiment, but its muted innovation narrative and limited media presence signaled a missed opportunity to elevate its brand story. While Vrbo's reliability resonates with its core audience, its challenge lies in translating this **stability** into a compelling, forward-looking narrative that captures consumer imagination and market share.

### Strengths:

- **Consistent operational** messaging, reinforcing a family-first, reliable image
- Balanced sentiment profile (2,500 positive vs. 2,531 negative mentions) reflects stability and consumer trust
- **Solid partnerships** with property management platforms like Guesty support a strong operational backbone

### Challenges:

- **Lower visibility** and engagement compared to Airbnb's high-profile campaigns
- **Innovation narrative lacks bold, experiential** elements and global resonance
- **Missed opportunities** to amplify positive stories through proactive earned media and owned storytelling

To rise beyond its steady but limited footprint, **Vrbo must embrace a bolder approach** to innovation and storytelling. Expanding experiential offerings, strengthening partnerships, and amplifying proactive narratives will be key to driving future brand growth and consumer connection.



# Vrbo Brand Equity Score™ Breakdown + Key Mentions



## Summary:

Vrbo's Brand Equity Score™ profile for Q2 2025 highlights a brand built on **consistent trust and operational reliability**, but with limited momentum in innovation and media engagement. While its steady reputation offers resilience, the brand risks being overshadowed by more dynamic competitors if it doesn't amplify its storytelling and innovation-led narratives. In a media landscape that rewards boldness, Vrbo must **balance its trust-first** foundation with proactive, forward-looking initiatives to elevate its equity.

Dimension	Key Observations	Highlighted Mention
Innovation	Vrbo's innovation was anchored in operational partnerships and platform integrations, with limited experiential narratives and global reach.	"National Survey Finds That Airbnb and VRBO Have Become Primary Rental Platforms" — <a href="#">MSN</a>
Trust	Vrbo maintained a steady trust profile through consistent messaging and partnerships, but lacked proactive storytelling to amplify its narrative.	"This Underrated Coastal Region Is One of the Most Beautiful in the US" — <a href="#">MSN</a>
Perception	Lower visibility and engagement reflected a more modest perception, highlighting the need for proactive media engagement and innovation storytelling.	"DON'T fall for this money TRAP!! #money #finance" — <a href="#">Snapchat</a>
Reputation	Vrbo's reputation remained stable, with limited exposure to major risks but also minimal differentiation in a competitive media landscape.	"Maui mayor's plan to phase out vacation rentals faces challenges" — <a href="#">NBC News</a>



# Spotlight – Regulatory Compliance vs. Experiential Freedom

Two Narratives. Two Different Trust Outcomes.



In the vacation rental industry, reputation is shaped by more than just consumer experiences. **Regulatory compliance and community impact** are increasingly defining how brands build – or erode – trust.

- Airbnb's experiential freedom narrative has driven bold innovation, unique partnerships, and global cultural relevance. From luxury high-rise partnerships to immersive event stays, Airbnb has positioned itself as a **lifestyle leader** in travel. However, this freedom has come at a cost: **regulatory scrutiny** in key markets, heightened service consistency issues, and neighborhood tensions that fuel trust erosion.
- In contrast, **Vrbo's regulatory-first approach** centers on operational stability, local partnerships, and community-friendly policies. While this narrative lacks the boldness of Airbnb's experiential campaigns, it has safeguarded trust by aligning with local regulations and fostering a perception of reliability and responsibility. Yet, Vrbo's steady approach has **limited its media resonance** and slowed innovation momentum.
- These contrasting narratives highlight a key reputation challenge for the industry: balancing the drive for innovation and consumer delight with operational credibility and regulatory alignment.

**Key Takeaway: Brands that harmonize experiential innovation with regulatory and community trust will be best positioned to sustain long-term equity and growth.**



# Strategic Lessons for Brand Leaders

## Trust and Innovation: Two Paths, One Destination

The Airbnb vs. Vrbo brand equity showdown in Q2 2025 reveals a powerful insight for brand strategists and communications leaders:

In a world where **consumers expect both boldness and reliability**, it's no longer a choice between innovation and trust — it's about integrating both. The future belongs to brands that can **balance dynamic engagement** with operational integrity.



### Trust Can't Be an Afterthought

Airbnb's high-profile innovation narrative captured attention, but trust gaps emerged from regulatory challenges and service inconsistency. Vrbo's steadier presence shows that trust is built not in campaigns but in consistent operational excellence.

### Innovation Needs a Strong Foundation

Bold initiatives must be underpinned by solid regulatory compliance and community engagement. Without this, even the most innovative campaigns risk creating reputational vulnerabilities that linger long after the spotlight fades.

### Visibility is Amplified by Credibility

High engagement and media buzz are valuable but must be matched by actions that reinforce trust. Consumer loyalty and long-term equity are built through a combination of narrative leadership and credible operational proof points.

### Balance is the New Brand Imperative

Vrbo's consistent approach shows that operational trust is a competitive advantage, but without compelling innovation, it risks fading into the background. Airbnb's bold moves highlight the risk of imbalance. Future leaders will integrate bold storytelling with operational credibility to win in the trust economy.

**The brands that can seamlessly weave innovation with credibility, and boldness with reliability, will set the standard for leadership in the next era of the vacation rental market.**



# Who's Doing It Well?

## Hospitality and Lifestyle Brands Earning Trust, Driving Innovation, and Leading Perception

While Airbnb and Vrbo remain key players in the vacation rental industry, other hospitality and lifestyle brands have demonstrated **bold, measurable steps** toward building **trust, innovation, and brand equity** in Q2 2025.

The following examples illustrate how purposeful action and values-driven strategy translate into meaningful brand impact.



### **Marriott International – Redefining Loyalty Through Personalized Experiences (Perception)**

Headline: Marriott Bonvoy expands loyalty program with personalized rewards and experiential offerings (Travel + Leisure)

- Marriott Bonvoy's recent expansion added hyper-personalized experiences to its loyalty program, blending technology with a human touch to strengthen consumer perception and engagement.

### **Hilton – Leading Sustainability Initiatives Through Concrete Action (Innovation)**

Headline: Hilton launches new Global Water Stewardship strategy across properties (Hilton Newsroom)

- Hilton's Global Water Stewardship plan sets measurable goals for reducing water use and improving sustainability in key markets, blending operational excellence with environmental leadership.

### **Accor – Embedding ESG into Business Strategy (Trust)**

Headline: Accor recognized for ESG leadership and sustainability initiatives (Accor)

- Accor's consistent ESG reporting and measurable progress on sustainability goals solidify its reputation as a responsible global hospitality leader.

### **Hyatt – Building Inclusive Workplaces and Community Trust (Reputation)**

Headline: Hyatt honored as one of the Best Companies for Diversity and Inclusion (Forbes)

- Hyatt's recognition for workplace diversity and inclusion reinforces brand reputation, demonstrating that operational values align with consumer and stakeholder expectations.

**A reminder that purposeful action elevates brand equity in today's trust-driven, innovation-hungry market.**



# Future Watch — Signals to Monitor

## Where Brand Equity Will Be Won (or Lost) Next

The Airbnb vs. Vrbo rivalry offers a window into the evolving dynamics of trust, innovation, and reputation in the vacation rental market. As consumer expectations shift and media landscapes fragment, the ability to lead conversations with credibility and consistency will determine long-term brand success.



### For Airbnb:

- **Reinforce Trust:** Address regulatory pressures and service consistency issues head-on with proactive, transparent communication.
- **Operational Proof Points:** Integrate evidence of operational improvements into bold storytelling to balance innovation with credibility.
- **Balance Engagement with Substance:** Leverage high visibility to amplify trust-building actions, ensuring campaigns resonate beyond surface-level engagement.

### For Vrbo:

- **Expand Innovation Narrative:** Move beyond operational partnerships to craft experiential and emotionally engaging stories.
- **Scale Media Presence:** Proactively drive earned media visibility through high-reach campaigns and owned content, amplifying the brand's presence.
- **Leverage Trust Foundation:** Build on Vrbo's stable trust profile by highlighting customer success stories and differentiating the brand through clear value propositions.



# About Brand Equity Score™

## Measuring More Than Mentions

Traditional media metrics like volume, reach, and sentiment offer important signals — but they rarely capture the full story of a brand's reputation.

**Brand Equity Score™** was developed to address this critical gap:

A structured, comparative benchmark that moves beyond mentions to measure how brands are perceived, trusted, and differentiated in the public conversation.

**The Brand Equity Score™** framework evaluates four critical dimensions:

- **Innovation** — Is the brand seen as future-forward, relevant, and industry-leading?
- **Trust** — Does the brand maintain credibility, transparency, and consumer confidence across key audiences?
- **Perception** — How is the brand framed in cultural narratives — aspirational, accessible, authentic, or distant?
- **Reputation** — What is the overall tone, resonance, and visibility of the brand across earned and social channels?

Unlike traditional models, **Brand Equity Score™** integrates full-data quantitative analysis with selective source-level review — ensuring that both the breadth and depth of brand reputation are captured.

### Why it matters

In today's fragmented, high-velocity media environment, brand visibility alone doesn't build equity. Narrative leadership, operational credibility, and cultural relevance define which brands will grow — and which will fade.

**Brand Equity Score™** gives communications, marketing, and executive teams the competitive advantage to not just measure performance — but to shape and defend brand equity in real time.



# Methodology Overview

## How Brand Equity Score™ Measures Competitive Reputation

The analysis behind **Brand Equity Score™** follows a two-tiered approach designed to balance quantitative media intelligence with qualitative narrative interpretation.

### Full Dataset Analysis (Breadth)

Using Meltwater's media intelligence platform, over 40,000 earned and social media mentions across Airbnb and Vrbo were analyzed from February 1 to April 30, 2025. Each mention was classified according to:

- Sentiment (positive, neutral, negative)
- Reach and engagement impact
- Brand relevance and salience
- Alignment to **Brand Equity Score™** dimensions:  
→ Innovation, Trust, Perception, Reputation

This full-dataset processing ensured that every earned mention contributed meaningfully to the brand equity evaluation — not just high-profile news.

### High-Impact Source Review (Depth)

While automation provides the backbone of data analysis, **Brand Equity Score™** integrates human-level narrative review for high-impact, high-reach coverage moments. This approach ensures tone, credibility, and strategic context are captured — beyond what automated keyword scoring alone can reveal.

### Scoring Approach

Each brand is scored across four pillars on a normalized 100-point scale. An overall **Brand Equity Score™** is calculated as the composite average of these dimensions, creating a comparable and actionable brand health benchmark.

### Why It Matters

Volume alone does not drive reputation. In today's environment, trust, innovation leadership, and values consistency shape how brands are judged.





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