

Shiji Group 2023

Guest Experience Benchmark

Q3
2023



Expanded city benchmark section

Sources for the Guide



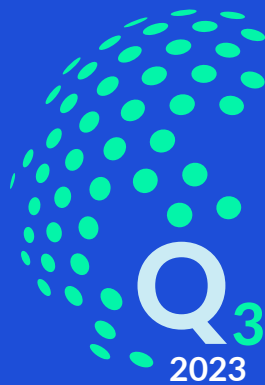


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Guest Experience Benchmark

Intro

CHAPTER

01



CHAPTER 1

The guest experience benchmark: now featuring an expanded city benchmark section



Welcome to the Q3 2023 Guest Experience Benchmark. In this edition, we analyse our largest data set to date: over 3.3 million reviews of 9,500 hotels around the world.

We have also expanded our City Benchmark section to include Global Review Index™ (GRI) scores for 71 cities around the world, in addition to City Hotel Rankings for the top-ranking 60 hotels in select destinations worldwide.

In this condensed version of the report, we have scaled back the amount of data, charts, and graphs displayed. For access to the complete data set, simply contact us.

Navigating the report

Data in the report is divided into four main sections: City Benchmark and City Rankings. In the regional sections, where you will find key review metrics and City Hotel Rankings for the six main regions of the world: Asia Pacific, Europe, Latin America & Caribbean, Middle East, Africa, and North America.

For a deeper dive into review comments, see the Insights & Strategies section following the regional sections. A Glossary and Methodology section can be found near the back of the report.

At Shiji, we are dedicated to providing the data, insights, and technology hoteliers need to understand guest sentiment, provide better guest experiences, and improve hotel performance. To learn more, reach out to one of our worldwide associates today.



Guest
Experience
Benchmark

Key findings

CHAPTER

02



CHAPTER 2

Our key findings for Q3 2023

Review scores

Hotels continue to recover review scores, with a slight setback

The Global Review Index (GRI) for the global data set was 85.4%, an increase of 1.2 points over Q3 2022 but a slight decrease over the previous quarter. Four-star hotels showed the biggest improvement, growing the GRI by 1.4 points to 85.6%, whereas 5-star hotels fell just short of the 90 percentile (89.5%). Asia Pacific achieved the highest GRI of the six regions (87.4%), whereas the Middle East had the lowest GRI (83.8%).

Review volume

Global review volume continues to surge, led by Asia Pacific

Global review volume grew by 15.0% relative to the same quarter in 2022. The largest increases came from the Asia Pacific region, growing by 38.2%, and the Latin America & Caribbean region, at 24.8%. Only European volume fell by 1.9%.

Review market share

Booking.com and Google generate over 70% of reviews

Once again, Booking.com dominated review market share, generating 40.3% of global review volume in the quarter, although its share slipped by 8.5 points relative to Q3 2022. Google was not far behind, accounting for 30.1% of reviews, followed by Tripadvisor at 9.5%. Expedia generated only 5.5% of global review volume.

CHAPTER 2

Source Indexes

Chinese OTAs generate highest review scores, Booking.com lowest

Ctrip and Trip.com clocked the highest Source Indexes of the major review sources, at 89.4% and 89.0% respectively. The other sources were several percentages behind, with Google reviews generating the third highest Source Index, at 86.1%. Booking.com generated the lowest Source Index, at 82.4%.

Semantic Analysis

Almost three quarters of review comments are positive

Of the almost 10 million mentions in review comments, 74.3% were positive and 24.7% were negative. Positive mentions increased by 3.0 points relative to Q3 2022. Of the top review sources, Ctrip, Trip.com, and HolidayCheck had the highest ratio of positive mentions, whereas Booking.com had the lowest ratio.

Management responses

Hoteliers respond to more reviews, more quickly

Hotels in the global data set responded to 62.5% of responsible reviews in the quarter, an increase of 3.3 points over Q3 2022. Positive reviews received a higher response rate (64.4%) than negative reviews (54.4%). On average, it took hotels 3.5 days to respond to positive reviews and 4.6 days to respond to negative reviews.

City data

The Highest-ranking Hotel Earned a Near-perfect GRI of 99.5%

New in city rankings this quarter are Singapore, Berlin, Mexico City, Doha, Cairo, and Los Angeles. The 5-star Belmond Copacabana Palace in Rio de Janeiro achieved the highest Global Review Index of all hotels in the 12 cities in the report, with a near-perfect score of 99.5%. In second place, at 98.8%, was the Four Seasons Hotel New York. And in third place was the 4-star La Valise in Mexico City, with a GRI of 98.6%.

The data set in the Global and Regional sections of this report is derived from 3,367,952 reviews of 9,500 hotels in 73 countries across six key regions: Asia Pacific, Europe, Latin America & Caribbean, Middle East, Africa, and North America. Reviews were collected from 55 online review sources. For details, see the Methodology section near the back of the report. For definitions of key metrics, see the Glossary section.



Guest
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Global data

CHAPTER

03



CHAPTER 3



Global: market overview

During peak season for hotels in the Northern Hemisphere, the growth trajectory that started on the heels of the pandemic continued its upward trend, although at a slower pace than the previous summer. By the end of August, year-to-date hotel occupancy was up by 10% over the same period in 2022 and RevPAR (revenue per available room) was up by 17%.¹

- Global travel demand continued to **grow in Q3 2023**
- The Global Review Index increased by **1.2** points to **85.4%**
- Review volume grew by **15.0%**
- Booking.com generated **40.3%** of reviews, down **8.5 points**
- Hotels responded to **62.5%** of reviews

Much of the growth came from Asia Pacific, the slowest region to recover from the pandemic. Elsewhere, hotel performance approached normalisation, with demand stabilising and rate growth barely keeping pace with inflation. Workers are returning to offices, and while the international, business, and group travel segments have picked up, travel volume is still below pre-pandemic levels.

¹Amadeus. [Double digit growth in global hospitality industry for Q4, with Europe leading the way](#). September 2023.

Global: GRI Metrics

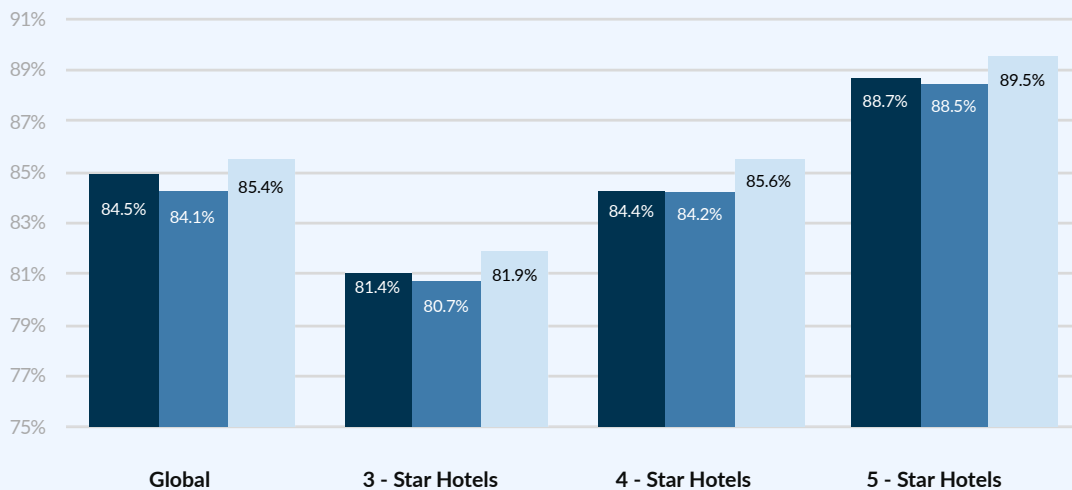
Despite inflated room rates, ongoing labour shortages, and the hottest summer on record bringing heat waves, wildfires, extreme storms, droughts, and floods to regions around the globe, hotels managed to keep guests relatively happy during the third quarter of 2023. The Global Review Index for the global data set

was 85.4%, a slight decrease from the previous quarter but 1.2 points higher than the same period in 2022. Four-star hotels showed the largest improvement, growing the GRI by 1.4 points.

Global: Global Review Index™ (GRI)

An overview of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 (OTAs) and review sites in over 45 languages.



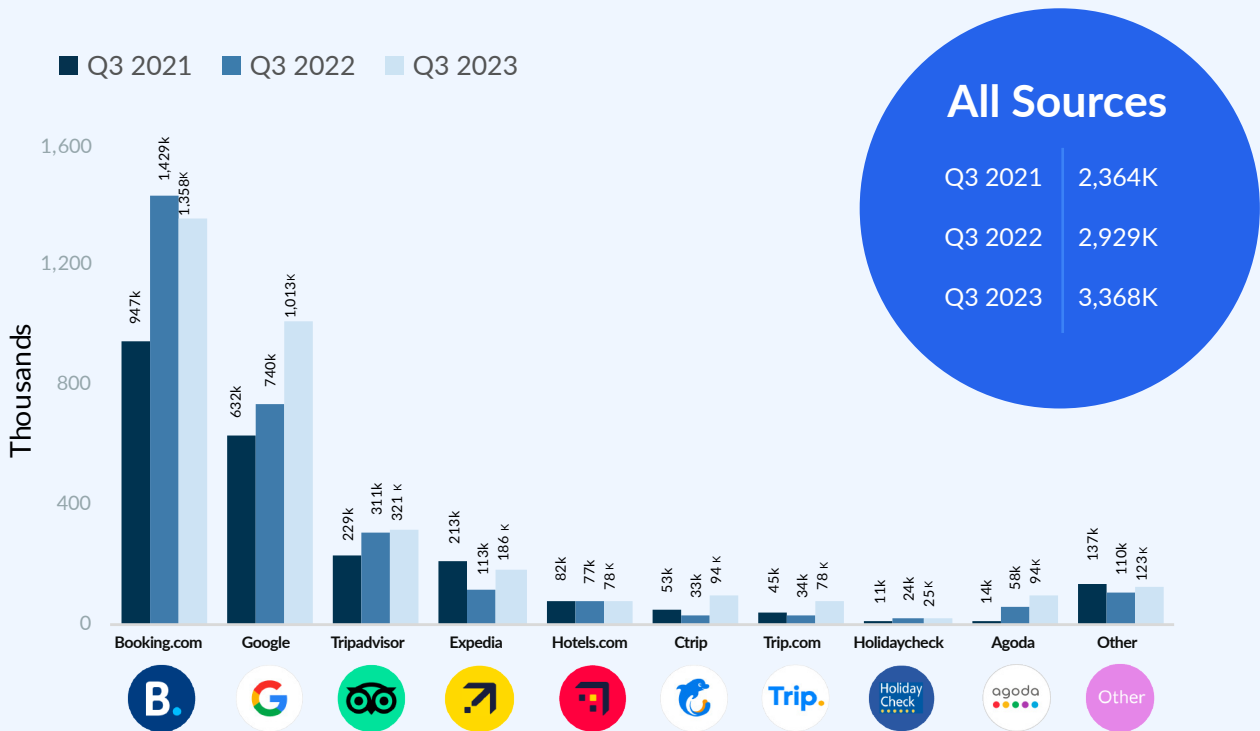
Global: Review Volume

Continued recovery in travel demand was evident in the increase in global review volume, which grew by 15.0% relative to Q3 2022 and by 42.5% relative to Q3 2021. Expedia's review volume surged by 64.5% and Google's by 36.8%, whereas Booking.com's volume fell by 5.0%. Reflecting the accelerated pace of recovery in the Asia Pacific region, review volume from China's two biggest online travel agencies

(OTAs), Ctrip and Trip.com, grew by 180.3% and 130.6% respectively, while Agoda's volume grew by 61.9%. However, these sources each represented a relatively small proportion of global reviews.

Global: Review Volume per Source

The volume of online guest reviews being left on major review platforms, a three-year comparison.



The review volume data set is collected from 55 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel data set representing the six major global regions.



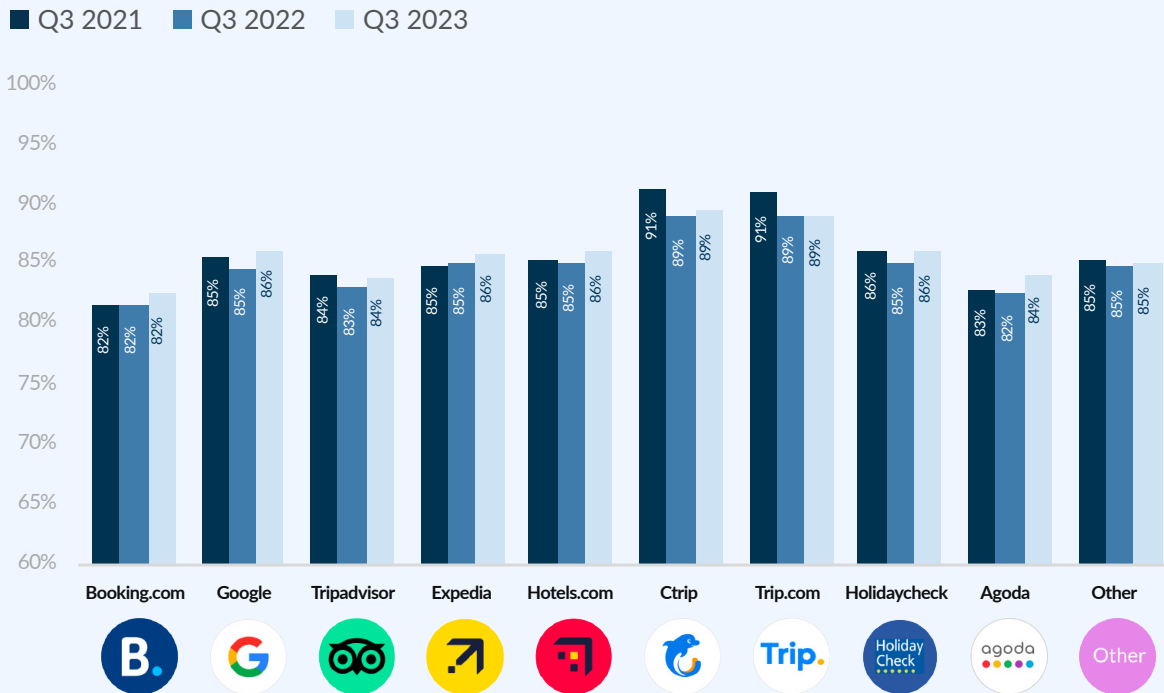
Global Review Source Indexes

Of the top review sources, Ctrip had the highest Source Index in the third quarter of 2023, with an average score of 89.4%. Next was Trip.com at 89.0%, followed by Google at 86.1%, whose index

increased by 1.5 points over Q3 2022. Booking.com had the lowest Source Index, at 82.4%, followed by Tripadvisor at 83.8% and Agoda at 83.9%.

Global: Review Source Indexes

A three-year comparison of guest review indexes per review source.



The review source scores are derived from Shiji ReviewPro's proprietary algorithm, from a 9,500-hotel data set representing the six major global regions.



Global: Semantic Analysis

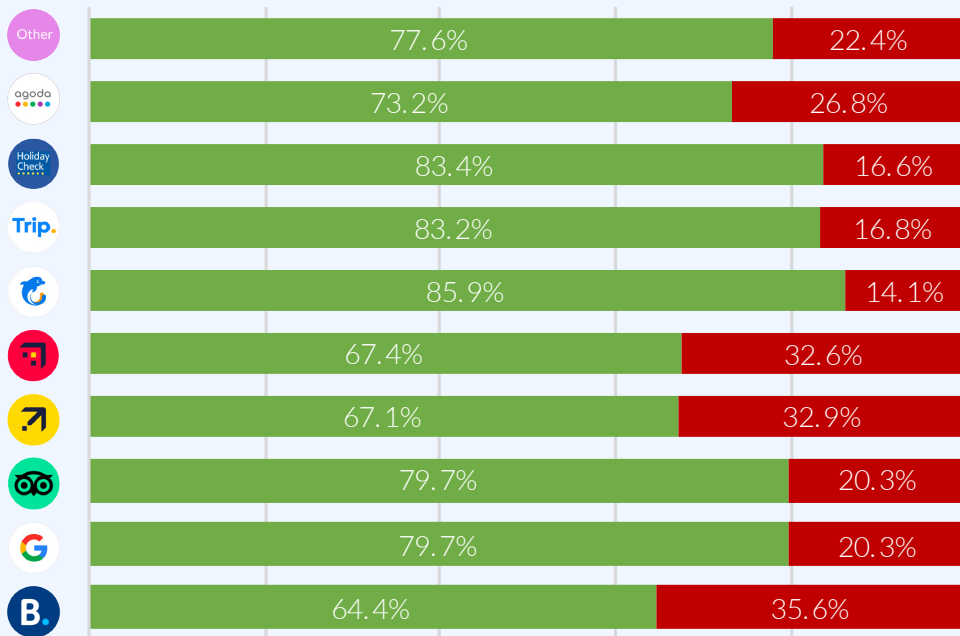
In semantic analysis of almost 10 million mentions in review comments, 74.3% of mentions were positive and 25.7% were negative. There were large disparities in the ratios of positive to negative reviews among the top review sources. Whereas well

over 80% of mentions on Ctrip, HolidayCheck, and Trip.com were positive, about one-third of mentions on Booking.com, Expedia, and Hotels.com were negative.

Global: Semantic Analysis by Source

Percentage of positive and negative mentions extracted from guest reviews from Q3 2023 per guest review source.

■ Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



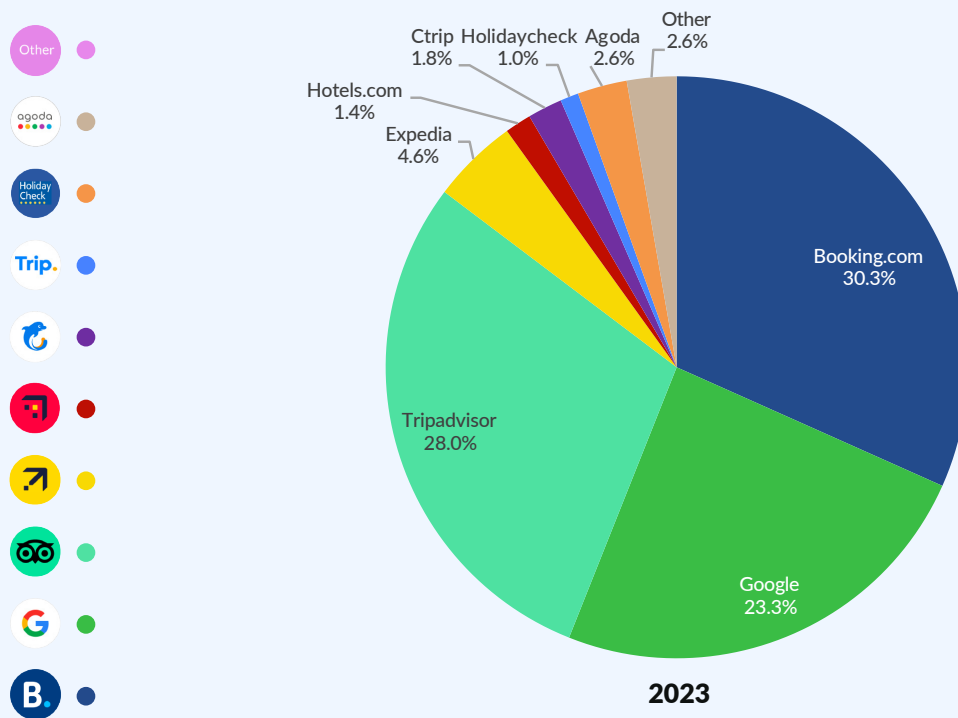
Shiji ReviewPro's AI-powered semantic analysis tool processes millions of online guest reviews to gain qualitative analysis. It does this by grouping reviews into categories and dividing by positive and negative sentiment. This allows hoteliers to gain a deep understanding of the content of reviews and gain clear insight into what is most impacting online reputation.



Global: Semantic Analysis

Global: Share of Mentions by Source

Percentage of total mentions extracted from online guest reviews per review source, in Q3 2023.



Shiji ReviewPro's AI-powered semantic analysis tool processes millions of online guest reviews to gain qualitative analysis. It does this by grouping reviews into categories and dividing by positive and negative sentiment. This allows hoteliers to gain a deep understanding of the content of reviews and gain clear insight into what is most impacting online reputation.



Global: Semantic Analysis

Global: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023 ■



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Global: Top 5 Categories Affecting GRI

Top Global Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.8	ROOM	-1.9
STAFF	0.6	CLEANLINESS	-1.4
SERVICE	0.4	ESTABLISHMENT	-1.2
FOOD & DRINKS	0.4	FOOD & DRINKS	-1.1
CLEANLINESS	0.3	FACILITIES	-1.0

Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE

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Global Management Responses

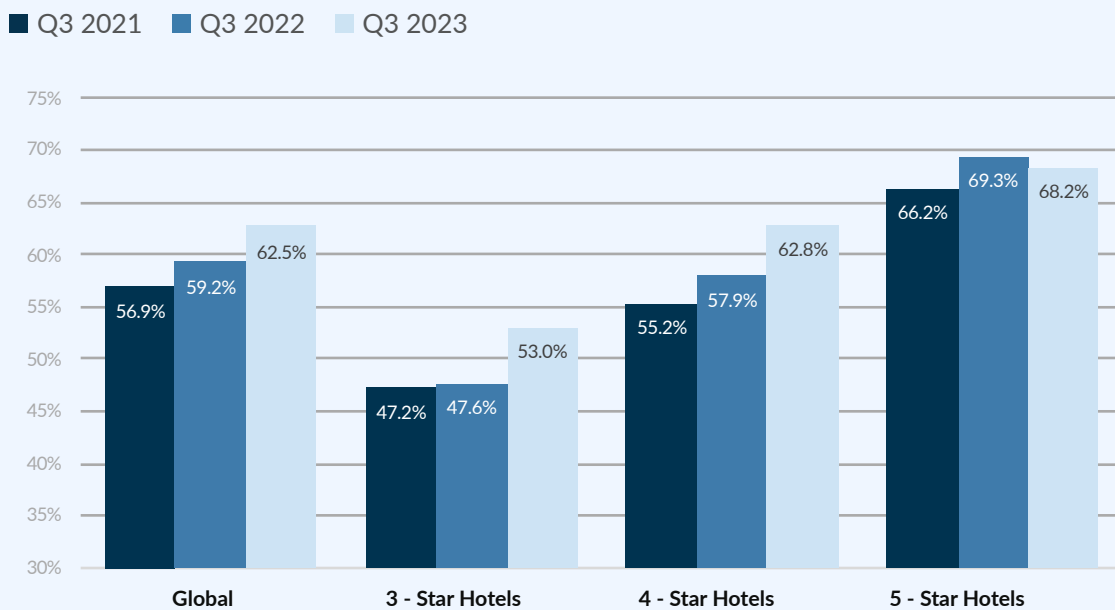
The report analysed over 2.2 million responsible reviews posted to the global data set in Q3 2023. Hoteliers responded to 62.5% of these reviews, an increase of 3.3 points over the same quarter the previous year. Five-star hotels responded to the highest proportion (68.2%), whereas 3-star hotels responded to the lowest proportion (53.0%).

reviews received the highest response rate of the top sources, at 82.0%, but only 68.0% of negative reviews received a response. Agoda reviews received the lowest response rate, at 43.6% of positive reviews and 33.3% of negative reviews. On average, it took hotels 3.5 days to respond to positive reviews and 4.6 days to respond to negative reviews.

Hotels responded to more positive reviews (62.3%) than negative reviews (50.2%). On Ctrip, positive

Global: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

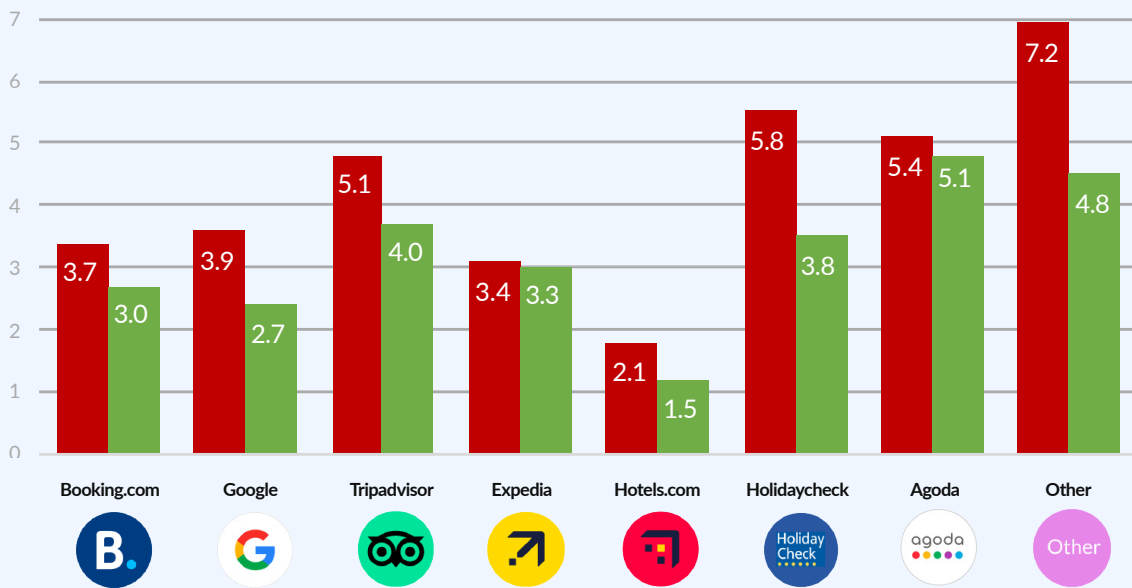


Global Management Responses

Global: Review Response Times per Review Source

The average number of days it took hotels to respond to positive and negative responsible online guest reviews in Q3 2023, per review source.

■ Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



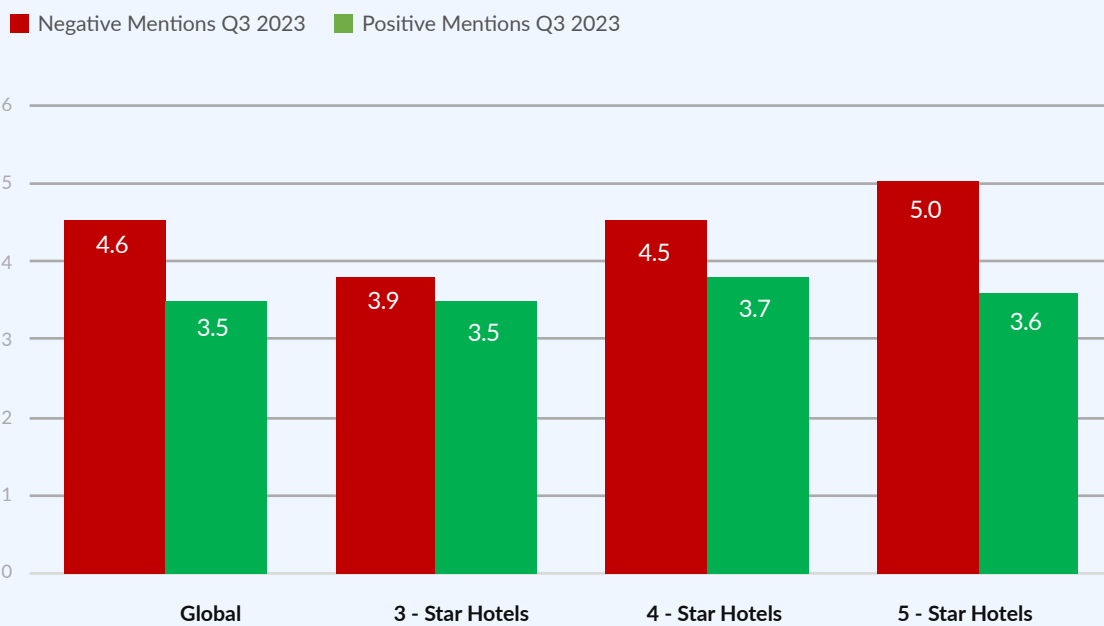
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Global Management Responses

Global: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.





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Regional data

CHAPTER

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CHAPTER 4



Key Review Performance Metrics by Region

While domestic travel has fully recovered from the pandemic in most regions of the world save for Asia Pacific, international tourism arrivals lagged at 84% of pre-pandemic levels as of year-to-date July 2023, according to the United Nations World Tourism Organization (UNWTO). The Middle East, Europe, and Africa showed the strongest recovery.²

- Middle East, Europe, and Africa lead the rebound in international travel
- The Global Review Index grew in all regions
- Asia Pacific had the highest GRI at **87.4%**
- Middle East had the lowest GRI at **83.8%**
- Asia Pacific grew review volume by **38.2%**

In every region, the Global Review Index grew by at least 1.0 points in the third quarter of 2023 relative to the same quarter the previous year. This is a sign that staffing challenges and other operational challenges arising from the pandemic have begun to ease and the guest experience is stabilising. All regions maintained a GRI within the mid-eighties, with a difference of only 3.6 points between the highest and lowest scores.

At 87.4%, hotels in the Asia Pacific region achieved the highest GRI, a pattern consistent with previous quarters. In fact, the region widened the gap, increasing the GRI by 1.6 points, a higher growth rate than any other region. The next highest GRI came from the Latin America & Caribbean

region, at 86.4%. Hotels in the Middle East had the lowest GRI, at 83.8%, although this was an improvement of 1.5 points over Q3 2022. North America was only slightly ahead of the Middle East, with a GRI of 83.9%.

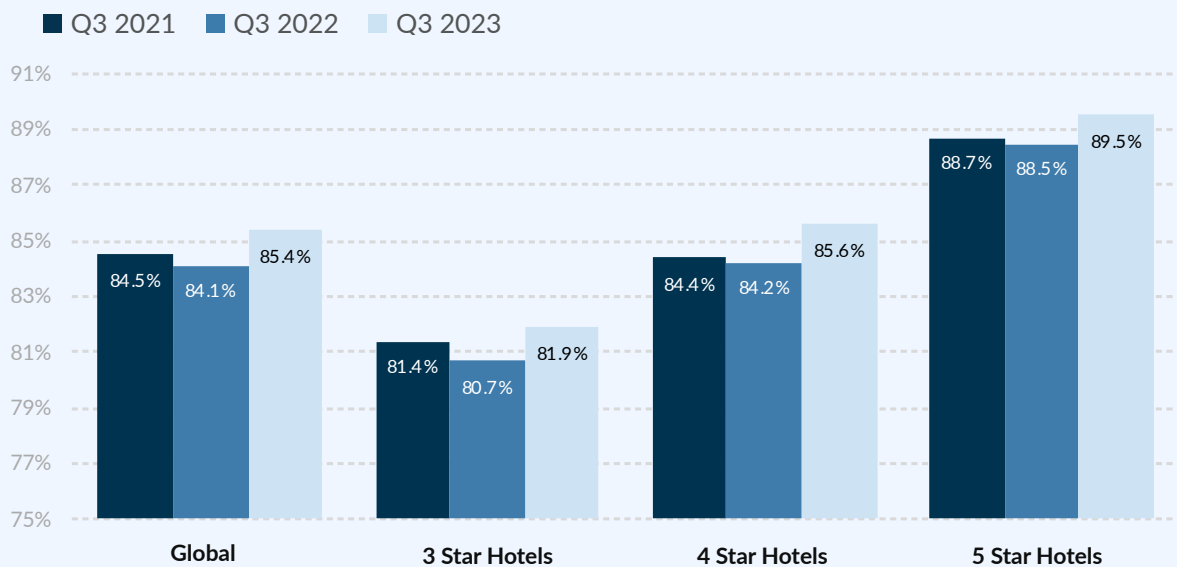
Asia Pacific grew review volume by 38.2% in the quarter, a reflection of the continued recovery in travel demand in the region. Growth in reviews was also strong in the Latin America & Caribbean, at 24.8%. Only European review volume declined, by 1.9%.

²United Nations World Tourism Organization (UNWTO). [International Tourism Swiftly Overcoming Pandemic Downturn](#). September 2023.

Key Review Performance Metrics by Region

Global: GRI™ Metrics Across Regions

Online reputation as measured by the GRI per global region, a three-year comparison.



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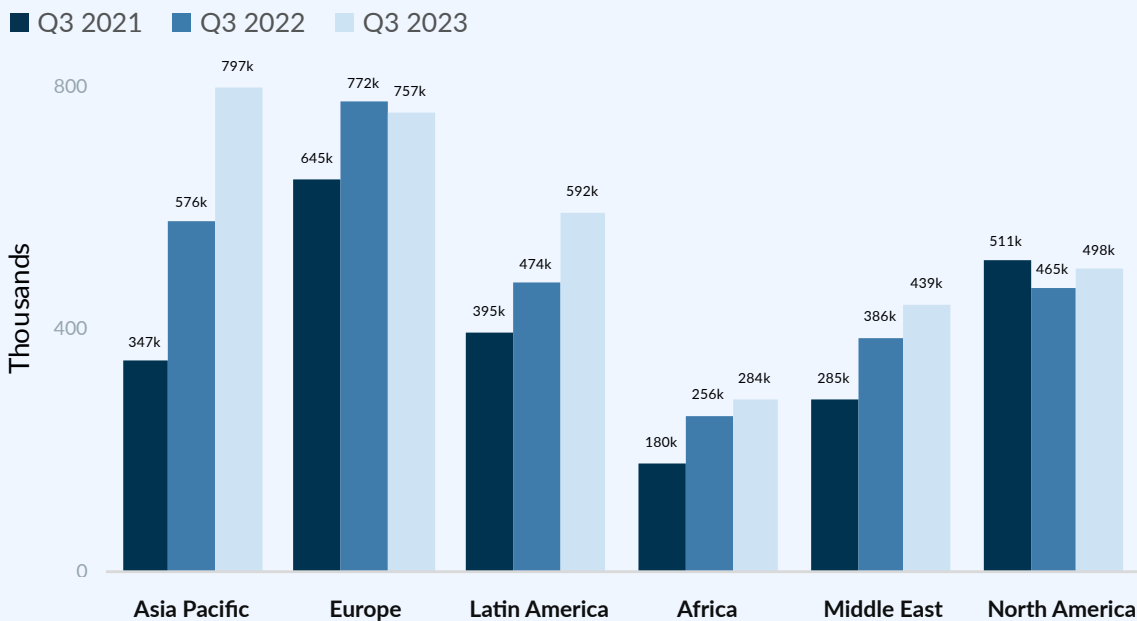
The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 Online Travel Agencies (OTAs) and review sites in over 45 languages.

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Key Review Performance Metrics by Region

Global: Review Volume Across Regions

Volume of guest reviews per global region, a three-year comparison.



The review volume data set is collected from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel data set representing the six major global regions.



This is a list of the most important hospitality technology providers on the planet.

1. _____
2. _____
3. _____
4. *Shiji*
5. _____

Can you guess who the others are?

We've come a long way, and that is something we are proud of. Since entering the global market of hotel tech providers five years ago, we have worked hard to earn our place as one of the best. It is an honour to be on the shortlist, and it is something we don't take for granted.

What keeps us going? Knowing that our entire team is working towards creating better product and better services for our clients, every day. Who knows, in five more years we may even be at the #1 spot.

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Guest
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City Benchmark

CHAPTER

05



CHAPTER 5



City Benchmark

This quarter, we bring an expanded data set, with last two quarters Global Review Index scores for 71 of the top travel destinations around the world. Cities are displayed in alphabetical order rather than ranked by GRI, as the mix of hotels and star segments is different in each city. For details, see the Methodology section near the end of the report.

City Benchmark Combined Results

	City	Q2+Q3 2023 GRI™
1	ABU DHABI	85.80%
2	AMSTERDAM	82.30%
3	ATHENS	81.60%
4	AUSTIN	78.50%
5	BANGKOK	81.90%
6	BARCELONA	83.80%
7	BEIJING	91.90%
8	BERLIN	80.00%
9	BOGOTA	85.60%
10	BRUSSELS	78.90%
11	BUCHAREST	84.40%
12	BUDAPEST	83.20%
13	BUENOS AIRES	82.60%
14	CAIRO	80.60%
15	CAPE TOWN	87.10%
16	CASABLANCA	78.60%
17	CHICAGO	82.60%
18	COPENHAGEN	82.40%
19	DOHA	86.90%
20	DUBAI	85.60%
21	DUBLIN	85.50%
22	EDINBURGH	85.00%
23	FLORENCE	85.60%
24	HELSINKI	84.50%
25	HONG KONG	83.00%

City Benchmark Combined Results

	City	Q2+Q3 2023 GRI™
26	HONOLULU	82.90%
27	ISTANBUL	80.50%
28	JAKARTA	87.60%
29	JOHANNESBURG	85.80%
30	KRAKOW	86.10%
31	KUALA LAMPUR	80.60%
32	LAS VEGAS	79.70%
33	LIMA	88.40%
34	LISBON	86.70%
35	LONDON	78.50%
36	LOS ANGELES	77.30%
37	MADRID	85.60%
38	MANCHESTER	83.10%
39	MARRAKECH	86.00%
40	MELBOURNE	83.10%
41	MEXICO CITY	86.30%
42	MIAMI	79.00%
43	MILAN	81.20%
44	MONTREAL	81.60%
45	MUNICH	81.50%
46	NEW DELHI	80.20%
47	NEW YORK	79.40%
48	OSLO	82.90%
49	PARIS	82.70%
50	PRAGUE	84.50%

City Benchmark Combined Results

	City	Q2+Q3 2023 GRI™
51	RIGA	82.90%
52	RIO DE JANEIRO	86.70%
53	RIYADH	78.50%
54	ROME	81.40%
55	SAN FRANCISCO	79.70%
56	SANTIAGO	85.10%
57	SAO PAULO	84.00%
58	SEOUL	83.50%
59	SHANGHAI	91.40%
60	SINGAPORE	82.20%
61	STOCKHOLM	82.10%
62	SYDNEY	82.20%
63	TOKYO	83.50%
64	TORONTO	82.00%
65	VANCOUVER	84.00%
66	VENICE	85.70%
67	VIENNA	83.50%
68	WARSAW	82.70%
69	WASHINGTON D.C.	82.90%
70	WELLINGTON	80.30%
71	ZURICH	82.00%



Guest
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Asia Pacific

CHAPTER

06



Asia Pacific: Market Overview

The gradual reopening of China has been a boon to travel in the Asia Pacific region this year, with occupancy rates rising steadily. In popular destinations like Bali, Phuket, and Singapore, average daily rates (ADR) exceeded 2019 levels by 20%.³

- Continued recovery in China boosted travel demand in Asia Pacific
- Asia Pacific earned the highest review score of **87.4%**
- Review volume grew by **38.2%**
- Booking.com and Google were neck-and-neck in review market share
- Hotels responded to **64.5%** of reviews

“China has finally reopened, and we’re seeing [a] complete rebound,” said Julia Simpson, president and CEO of the World Travel & Tourism Council (WTTC), in September. However, recovery in outbound travel has been tempered by internal issues in China, including slow issuance of travel visas, limited air capacity, and reduced corporate spending.

Despite a surge of 38.2% in review volume, hotels in the region managed to increase the GRI by 1.6 points to 87.4%. This further entrenched Asia Pacific’s lead as the top performer of the six regions. Three-star hotels showed the biggest improvement, growing the GRI by 1.7 points to 84.5%, whereas 5-star hotels achieved a GRI of 90.6%, joining 5-star hotels in the Middle East as the only segments to reach the ninetieth percentile.

Booking.com lost 9.1% in review market share in the quarter, bringing it in close competition with Google for the largest share in the Asia Pacific region, accounting for 25.4% and 25.0% of review volume respectively. Ctrip came in at a distant third, occupying 11.1% of market share, followed by Agoda at 9.4%.

In spite of the increase in review volume, hotels also grew the review response rate by 2.8 points over Q3 2022, responding to 64.5% of reviews. Hoteliers responded to 66.5% of positive reviews and 52.8% of negative reviews.

³ JLL. Hotel Operators’ [Sentiment Asia Pacific](#). September 2023.

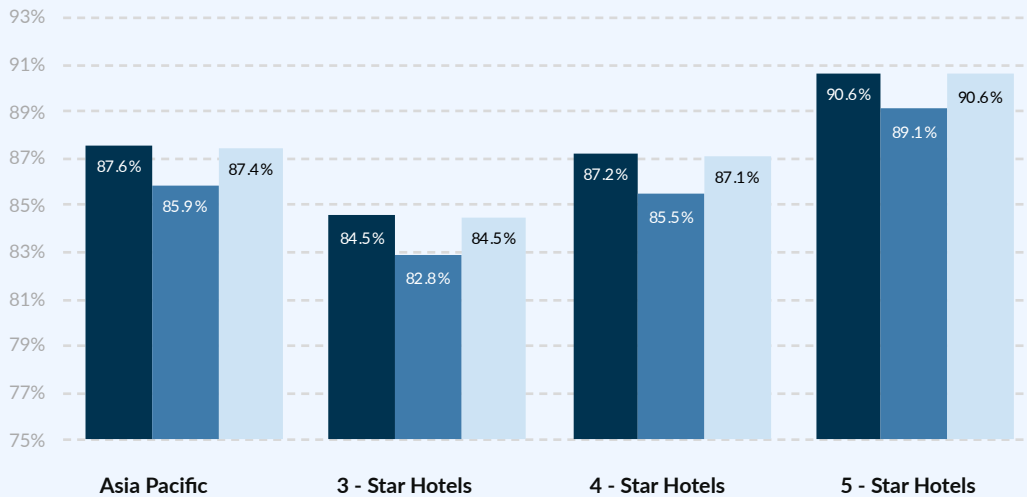
⁴ News.cn. [Interview: China to become world’s largest travel market in coming years - tourism council chief](#). September 2023.

Asia Pacific: GRI Metrics

Asia Pacific: Global Review Index™ (GRI)

A three year comparison of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



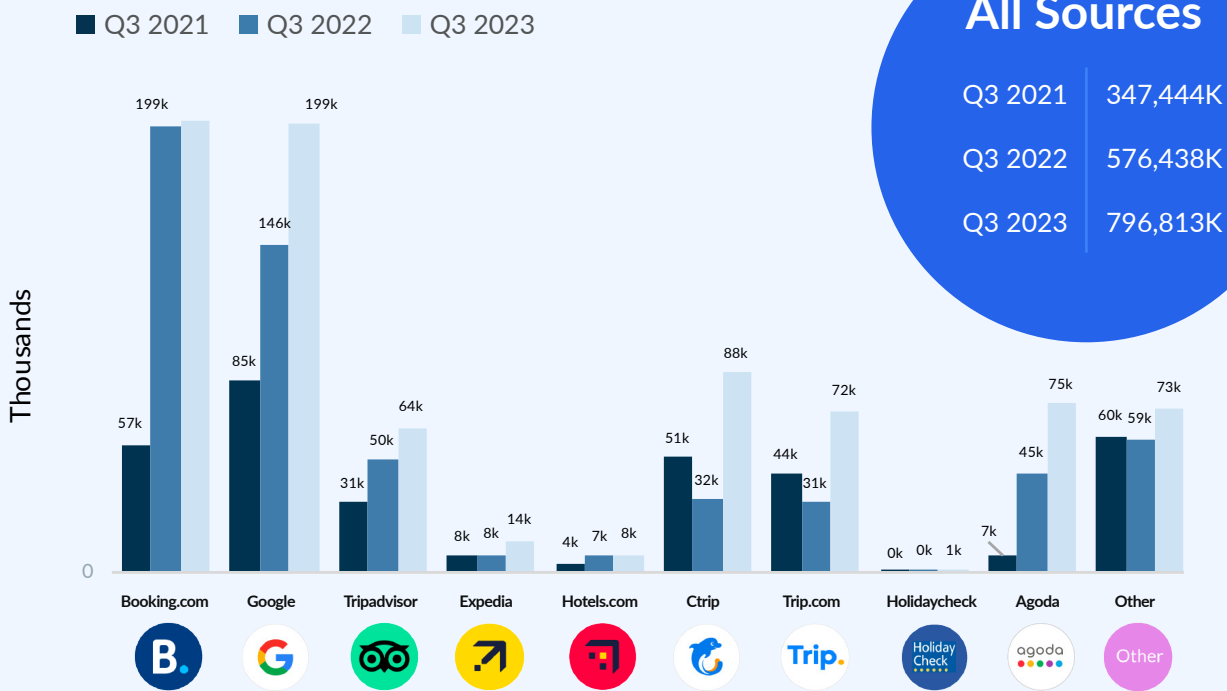
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Asia Pacific: Review Volume

Asia Pacific: Review Volume per Source

A three-year comparison of online guest review volume, per review source.



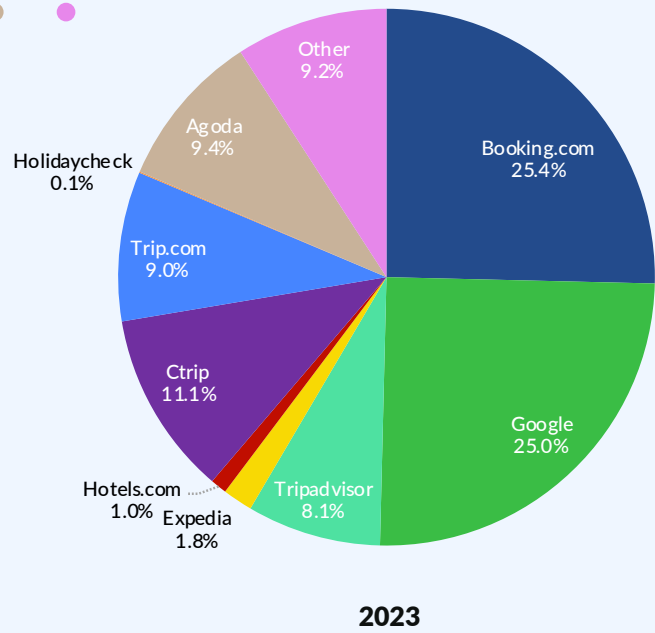
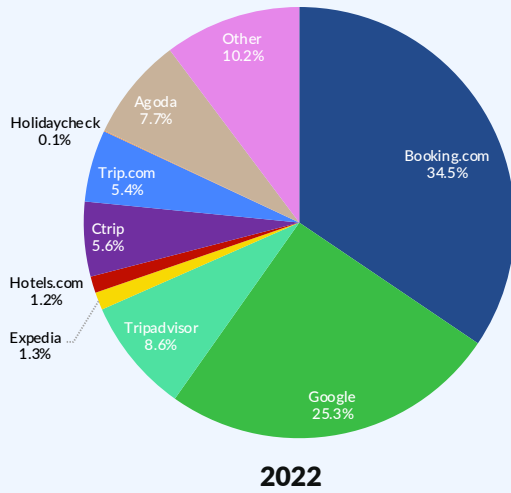
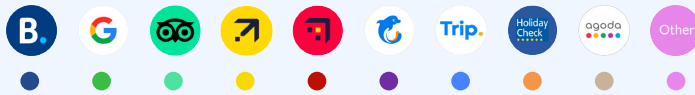
The Review volume collects reviews from 55 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.



Asia Pacific: Share of Reviews Per Source

Asia Pacific: Review Volume per Source

A YOY comparison of guest review market share per review source.



The review site/OTA market share percentage and changes are derived from a 9,500-hotel data set representing the six major global regions.

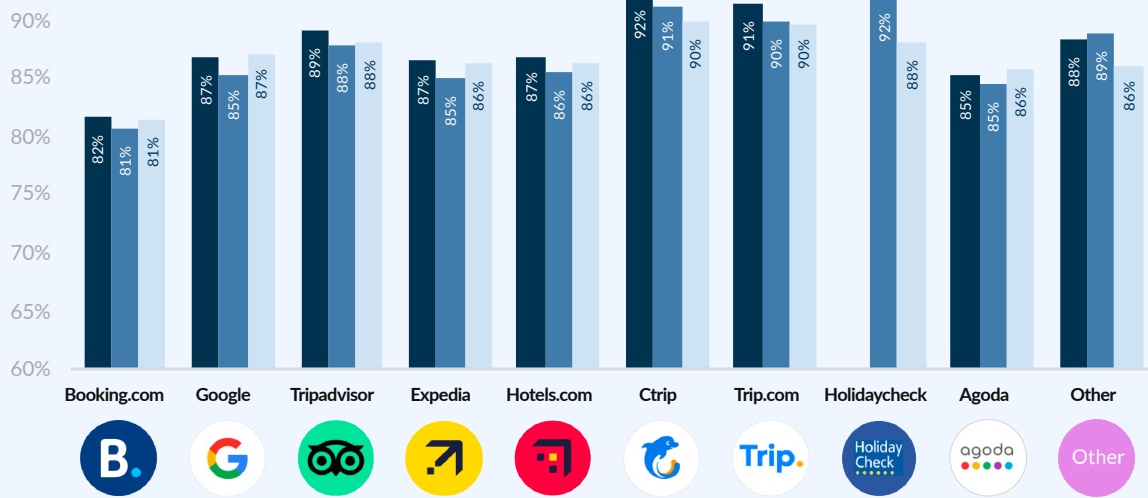


Asia Pacific: Review Source Indexes

Asia Pacific: Review Source Indexes

A three-year comparison of guest review indexes per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The review source scores are derived from Shiji ReviewPro's proprietary algorithm, from a 9,500-hotel data set representing the six major global regions.



Asia Pacific: Top 5 Categories Affecting GRI

Asia: Top Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

POSITIVE		NEGATIVE	
CATEGORY	SCORE	CATEGORY	SCORE
EXPERIENCE	0.5	ROOM	-1.1
SERVICE	0.5	CLEANLINESS	-0.8
STAFF	0.4	ESTABLISHMENT	-0.6
CLEANLINESS	0.4	FOOD & DRINKS	-0.5
FOOD & DRINKS	0.4	FACILITIES	-0.5

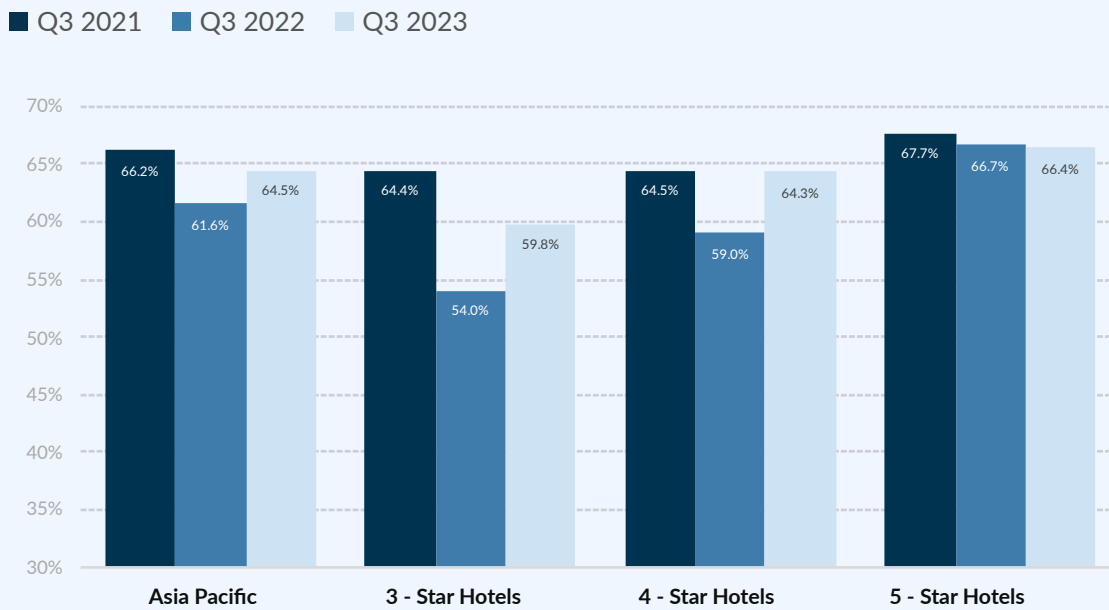
Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE


Asia Pacific: Management Responses

Asia Pacific: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Asia Pacific: Management Responses

Asia Pacific: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



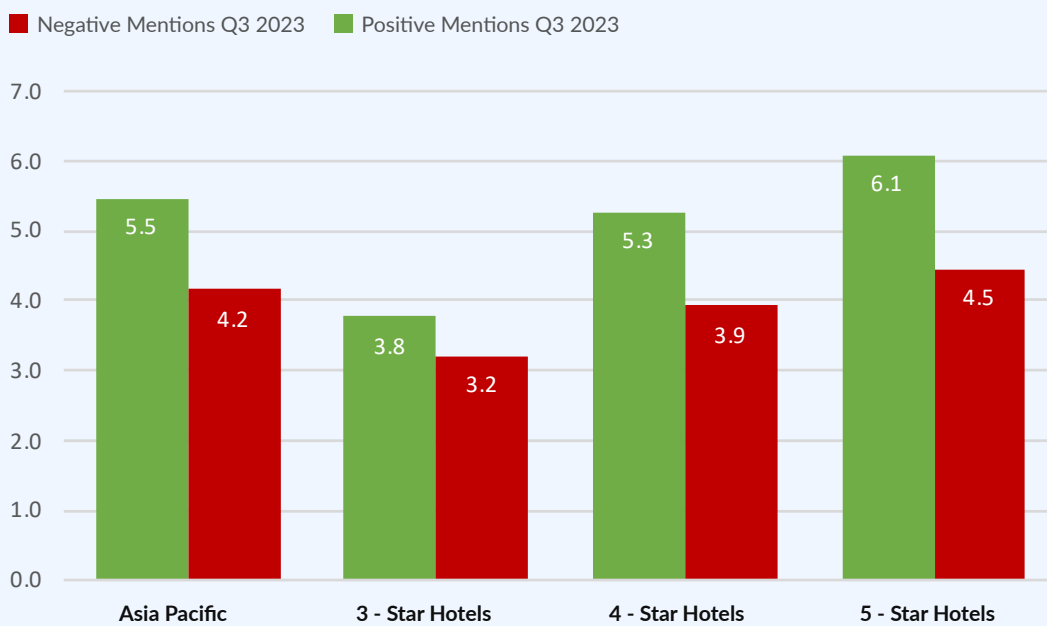
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Asia Pacific: Management Responses

Asia Pacific: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.



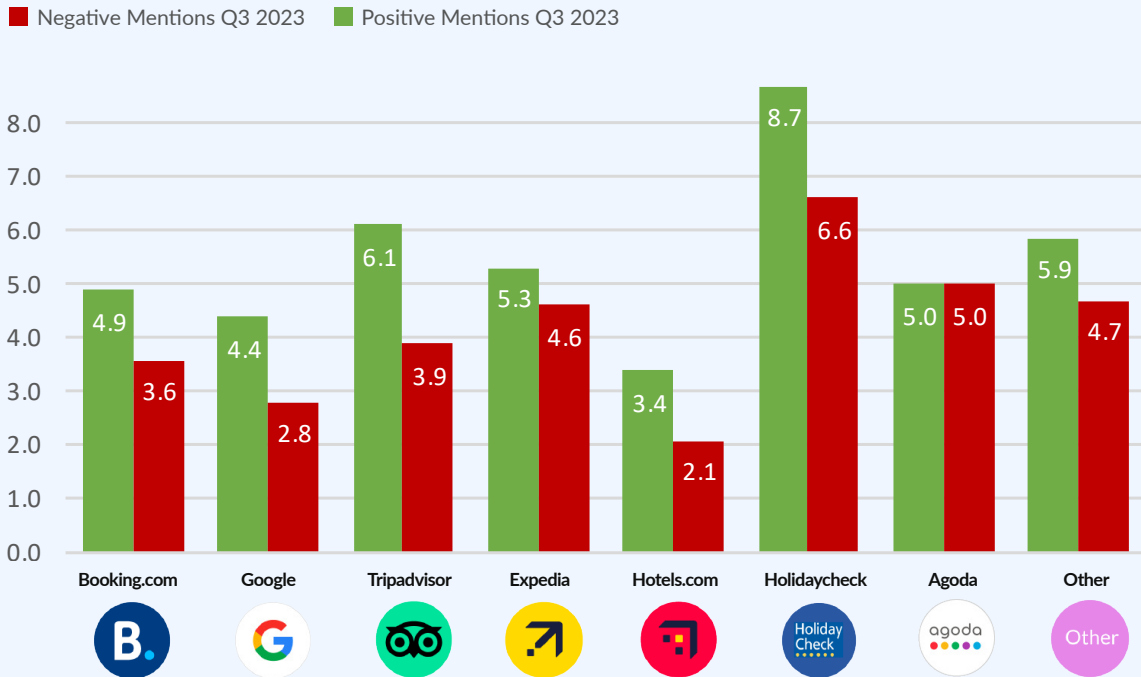
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Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Asia Pacific: City Benchmark

Here we have selected 13 cities in the APAC region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

3-STAR HOTELS ASIA PACIFIC

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
BANGKOK	79.0%	0.6	71.6%	3.8
BEIJING	90.9%	-0.9	84.9%	-4.8
HONG KONG	77.1%	5.4	66.7%	4.4
JAKARTA	85.8%	0.6	82.0%	2.5
KUALA LAMPUR	75.4%	2.8	61.4%	4.5
MELBOURNE	75.8%	1.7	59.5%	1.2
NEW DELHI	78.0%	3.9	79.5%	10.2
SEOUL	80.4%	0.2	75.2%	3.8
SHANGHAI	89.8%	-1.3	84.1%	-2.5
SINGAPORE	73.3%	2.9	61.5%	4.6
SYDNEY	77.4%	2.5	61.2%	5.1
TOKYO	80.9%	1.2	72.6%	-0.8
WELLINGTON	75.5%	3.0	59.2%	4.2

4-STAR HOTELS ASIA PACIFIC

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
BANGKOK	83.60%	0.5	74.80%	2.3
BEIJING	91.40%	-0.3	84.30%	-1.5
HONG KONG	83.30%	5.4	72.80%	1.5
JAKARTA	89.80%	1.5	88.00%	5.2
KUALA LAMPUR	84.20%	1.6	73.10%	4.9
MELBOURNE	82.90%	2.2	68.10%	5.3
NEW DELHI	85.60%	6.3	85.90%	9.2
SEOUL	83.90%	0.0	73.60%	1.7
SHANGHAI	91.20%	-0.7	84.90%	0.9
SINGAPORE	83.90%	2.6	72.10%	7.2
SYDNEY	82.40%	1.6	67.80%	3.2
TOKYO	85.90%	0.9	74.60%	-3.9
WELLINGTON	82.40%	1.8	64.30%	2.7

5-STAR HOTELS ASIA PACIFIC

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
BANGKOK	89.50%	0.8	81.90%	3.6
BEIJING	93.30%	-0.5	86.10%	-0.3
HONG KONG	90.40%	3.4	80.80%	-2.8
JAKARTA	94.50%	0.8	90.40%	4.5
KUALA LAMPUR	87.90%	1.7	73.90%	5.9
MELBOURNE	87.10%	2.4	71.50%	5.2
NEW DELHI	91.40%	3.0	88.40%	6.8
SEOUL	89.10%	1.0	75.70%	1.2
SHANGHAI	92.10%	0.3	84.40%	1.0
SINGAPORE	88.90%	2.5	78.50%	5.0
SYDNEY	88.00%	2.6	70.70%	5.1
TOKYO	90.30%	1.3	78.90%	-2.8
WELLINGTON	81.50%	-0.3	66.20%	2.2

CHAPTER 6



Sydney / Singapore – City Hotel Ranking

3-STAR HOTELS SYDNEY

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Alexander the Great Motel	1	89.2%	0.7	100
2	Mary MacKillop Place	-1	88.8%	-0.6	184
3	Royal Hotel Randwick	2	87.4%	1.6	273
4	The Clovelly Hotel	3	86.6%	2.0	207
5	Kith Hotel Darling Harbour	9	86.3%	4.6	483
6	ValueSuites Green Square	2	84.1%	-0.3	726
7	Perouse Randwick by Sydney Lodges	6	84.1%	1.9	200
8	Little Coogee Hotel	1	83.7%	-0.4	276
9	Sydney Boutique Hotel	-6	83.6%	-4.3	348
10	Mt. Kuring-Gai Motel	2	83.3%	0.7	127
11	Coogee Bay Hotel	7	83.2%	2.1	241
12	Hotel Bondi	-2	83.0%	-0.6	461
13	Avoca Randwick by Sydney Lodges	-7	83.0%	-2.7	136
14	28 Hotel	NEW	82.8%	---	434
15	Southend Hotel	0	82.6%	1.1	144
16	Narwee Hotel	-5	82.5%	-0.8	205
17	The Charrington Boutique Hotel	NEW	82.5%	---	154
18	High Cross Randwick by Sydney Lodges	NEW	82.0%	---	112
19	No 9 Springfield	NEW	81.4%	---	530
20	Nesuto Woolloomooloo	NEW	80.5%	---	212

3-STAR HOTELS SINGAPORE

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	ibis Singapore on Bencoolen	NEW	85.0%	NEW	1313
2	Bliss Hotel Singapore	NEW	83.7%	NEW	409
3	The Sultan	NEW	82.5%	NEW	426
4	Lloyd's Inn	NEW	81.5%	NEW	315
5	Strand Hotel	NEW	80.3%	NEW	648
6	Summer View Hotel	NEW	80.2%	NEW	645
7	Park View Hotel	NEW	79.6%	NEW	595
8	Hotel NuVe	NEW	78.6%	NEW	179
9	ibis Singapore Novena	NEW	77.8%	NEW	367
10	Aqueen Hotel Paya Lebar	NEW	77.6%	NEW	371
11	Hotel YAN	NEW	77.3%	NEW	295
12	Sandpiper Hotel	NEW	75.9%	NEW	235
13	Ibis Budget Singapore Imperial	NEW	75.5%	NEW	532
14	ibis budget Singapore Selegie	NEW	75.2%	NEW	402
15	Check-Inn @Little India	NEW	74.9%	NEW	263
16	Venue Hotel	NEW	74.1%	NEW	321
17	Hotel Clover The Arts	NEW	73.9%	NEW	353
18	J8 Hotel	NEW	73.7%	NEW	533
19	Penta Hotel	NEW	73.6%	NEW	187
20	St Signature Bugis Beach	NEW	73.1%	NEW	132

CHAPTER 6

4-STAR HOTELS SYDNEY

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Wildlife Retreat At Taronga	0	94.5%	-0.1	489
2	Adina Apartment Hotel Sydney Chippendale	1	93.8%	1.4	278
3	Medusa Hotel	-1	92.9%	-0.8	144
4	Camden Valley Inn	3	91.5%	1.2	677
5	Best Western Casula Motor Inn	0	91.0%	0.3	152
6	Mrs Banks Hotel	-2	90.9%	0.0	153
7	Quest North Sydney	1	90.3%	---	388
8	Adina Apartment Hotel Bondi Beach Sydney	NEW	90.0%	0.8	311
9	The Albert Hotel Mosman	3	89.9%	0.1	176
10	Mercure Sydney Liverpool	0	89.7%	-0.2	573
11	The Grace Hotel	-2	89.6%	0.9	2622
12	Crowne Plaza Sydney Darling Harbour, an IHG Hotel	2	89.5%	---	326
13	West Hotel Sydney, Curio Collection by Hilton	NEW	89.2%	0.2	304
14	Aiden By Best Western @ Darling Harbour	-1	89.1%	---	630
15	Bondi 38 Serviced Apartments	NEW	89.0%	1.3	124
16	Holiday Inn Sydney St Marys, an IHG Hotel	3	88.8%	-0.4	214
17	A by Adina Sydney	-6	88.6%	0.5	999
18	Adina Apartment Hotel Sydney Airport	-2	88.2%	0.4	1088
19	Coogee Sands Hotel & Apartments	-2	88.2%	0.4	576
20	Avonmore on the Park Boutique Hotel	-5	88.0%	-0.6	197

4-STAR HOTELS SINGAPORE

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	AMOY by Far East Hospitality	NEW	93.3%	NEW	550
2	Ann Siang House, The Unlimited Collection by Oakwood	NEW	92.3%	NEW	132
3	Holiday Inn Singapore Little India, an IHG Hotel	NEW	92.1%	NEW	1235
4	Le Grove Serviced Residences	NEW	91.9%	NEW	224
5	Courtyard by Marriott Singapore Novena	NEW	90.9%	NEW	195
6	Wanderlust, The Unlimited Collection by Oakwood	NEW	90.1%	NEW	259
7	V Hotel Bencoolen	NEW	89.7%	NEW	2042
8	Village Hotel Sentosa by Far East Hospitality	NEW	89.4%	NEW	2189
9	Citadines Balestier Singapore	NEW	89.3%	NEW	415
10	Orchid Hotel	NEW	89.2%	NEW	189
11	The Scarlet Singapore	NEW	89.1%	NEW	705
12	Capri by Fraser China Square, Singapore	NEW	88.8%	NEW	1035
13	Citadines Raffles Place Singapore	NEW	88.7%	NEW	407
14	Quincy Hotel Singapore by Far East Hospitality	NEW	88.2%	NEW	701
15	lyf Funan Singapore	NEW	88.1%	NEW	2093
16	Oasia Hotel Downtown, Singapore by Far East Hospitality	NEW	88.1%	NEW	1186
17	JEN Singapore Orchardgateway by Shangri-La	NEW	88.0%	NEW	2014
18	lyf one-north Singapore	NEW	88.0%	NEW	674
19	Holiday Inn Express Singapore Orchard Road, an IHG Hotel	NEW	87.8%	NEW	859
20	Village Hotel Katong by Far East Hospitality	NEW	87.5%	NEW	938

CHAPTER 6



5-STAR HOTELS SYDNEY

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Capella Sydney	0	96.1%	0.5	199
2	The Darling at The Star	1	94.7%	0.8	645
3	Four Seasons Hotel Sydney	1	93.3%	0.5	2038
4	Little National Hotel Sydney	2	93.0%	1.0	1191
5	QT Sydney	-3	92.9%	-1.7	783
6	SKYE Suites Sydney	3	92.5%	1.5	511
7	Radisson Blu Plaza Hotel Sydney	1	91.9%	0.7	2360
8	Park Hyatt Sydney	10	91.6%	2.8	328
9	Crystalbrook Albion	-4	91.6%	-0.6	143
10	The Fullerton Hotel Sydney	2	91.2%	0.9	2751
11	Meriton Suites Coward Street, Mascot	0	90.8%	0.2	1088
12	SKYE Suites Green Square	-2	90.8%	0.1	484
13	Kimpton Margot Sydney, an IHG Hotel	NEW	90.6%	---	290
14	Sheraton Grand Sydney Hyde Park	0	90.3%	0.9	1188
15	Zara Tower - Luxury Suites and Apartments	-2	90.3%	0.0	549
16	Sofitel Sydney Darling Harbour	4	89.5%	1.1	1177
17	InterContinental Sydney, an IHG Hotel	NEW	89.3%	---	1000
18	The Langham Sydney	NEW	89.1%	---	330
19	Meriton Suites North Sydney	-4	89.0%	-0.1	674
20	Meriton Suites North Ryde	-4	88.9%	-0.1	614

5-STAR HOTELS SINGAPORE

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Capella Singapore	NEW	96.1%	NEW	457
2	The Fullerton Bay Hotel Singapore	NEW	95.4%	NEW	445
3	Raffles Singapore	NEW	94.8%	NEW	515
4	Mandarin Oriental, Singapore	NEW	94.1%	NEW	156
5	The Fullerton Hotel Singapore	NEW	94.0%	NEW	1550
6	PARKROYAL COLLECTION Marina Bay, Singapore	NEW	93.7%	NEW	2241
7	InterContinental Singapore, an IHG Hotel	NEW	93.6%	NEW	881
8	Marina Bay Sands	NEW	93.5%	NEW	5839
9	Sofitel Singapore City Centre	NEW	93.5%	NEW	526
10	PARKROYAL COLLECTION Pickering, Singapore	NEW	93.4%	NEW	1678
11	The Ritz-Carlton, Millenia Singapore	NEW	93.1%	NEW	1143
12	Conrad Centennial Singapore	NEW	93.0%	NEW	973
13	The Barracks Hotel Sentosa by Far East Hospitality	NEW	93.0%	NEW	486
14	Four Seasons Hotel Singapore	NEW	92.7%	NEW	721
15	Hotel Indigo Singapore Katong	NEW	92.6%	NEW	590
16	Villa Samadhi, Singapore	NEW	92.6%	NEW	207
17	InterContinental Singapore Robertson Quay, an IHG Hotel	NEW	92.1%	NEW	483
18	Fairmont Singapore	NEW	91.9%	NEW	964
19	The Capitol Kempinski Hotel Singapore	NEW	91.6%	NEW	689
20	Swissotel The Stamford Singapore	NEW	91.3%	NEW	1400



Guest
Experience
Benchmark

Europe

CHAPTER

07



CHAPTER 7



Europe: Market Overview

It was a strong summer for tourism in Europe despite numerous headwinds, including rising inflation, ongoing war in Ukraine, and searing heat, drought conditions, and wildfires on parts of the continent. Demand was spurred by an increase in flight capacity, strong performance in key gateway cities like London, Paris, and Amsterdam, and a surge in visitor volume from the U.S., the region's primary source of long-haul tourism.⁵

- Growth in ADR and RevPAR was strong; occupancy was flat
- European hotels increased the GRI by **1.0 points to 84.8%**
- Review volume fell by **1.9%**
- Booking.com generated **64.3%** of reviews in the region
- Hotels responded to **56.3%** of reviews

Globally, Europe is leading the charge in tourism recovery, although the pace of growth has slowed. July occupancy was just 0.2% above the same month in 2022 and 3.8 points below July 2019. RevPAR reached a new high in July, growing by 8.3% over July 2022, buoyed by an increase in ADR of 8.1%. In August, occupancy rates remained stable, while ADR rose by 5.4% over August 2022.

Hotels in Europe achieved a Global Review Index of 84.8% in the third quarter of 2023, an increase of 1.0 points over Q3 2022 but 0.6 points lower than the global average.

Review volume fell by 1.9% relative to Q3 2022, a reflection of the relatively stagnant occupancy in the region. Booking.com generated a massive 64.3% of review market share, once again representing the highest share of any of the six regions, despite losing 2.5 points in share. Google increased its review share by 1.3 points to 17.9%, and Tripadvisor generated 8.3% of reviews. Although Expedia increased its review volume by

28.1% in the quarter, it represented only 2.5% of market share.

Hoteliers in Europe responded to 56.9% of reviews in the third quarter, an increase of 5.2 points over the same quarter the previous year. Five-star hotels responded to 67.0% of reviews, whereas 3-star hotels responded to only 43.8%. On average, it took 4.1 days to respond to positive reviews and 5.3 days to respond to negative reviews.

⁵ CBRE. 2023 Global Midyear Hotels Outlook. October CBRE. 2023

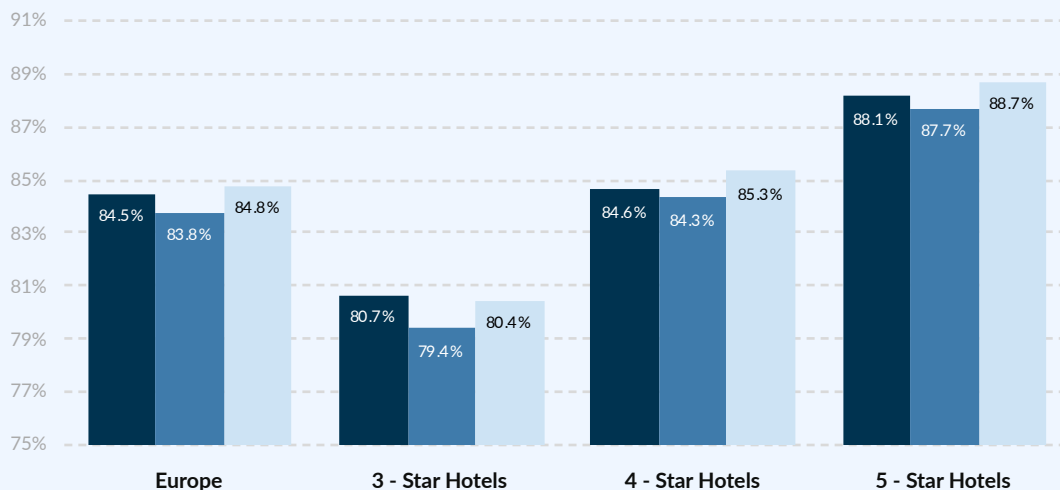
⁶ Hospitality. Summer 2023, [European hotel industry: are holidaymakers looking for a breath of fresh air?](#) September 2023.

Europe: GRI Metrics

Europe: Global Review Index™ (GRI)

A three year comparison of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 (OTAs) and review sites in over 45 languages.

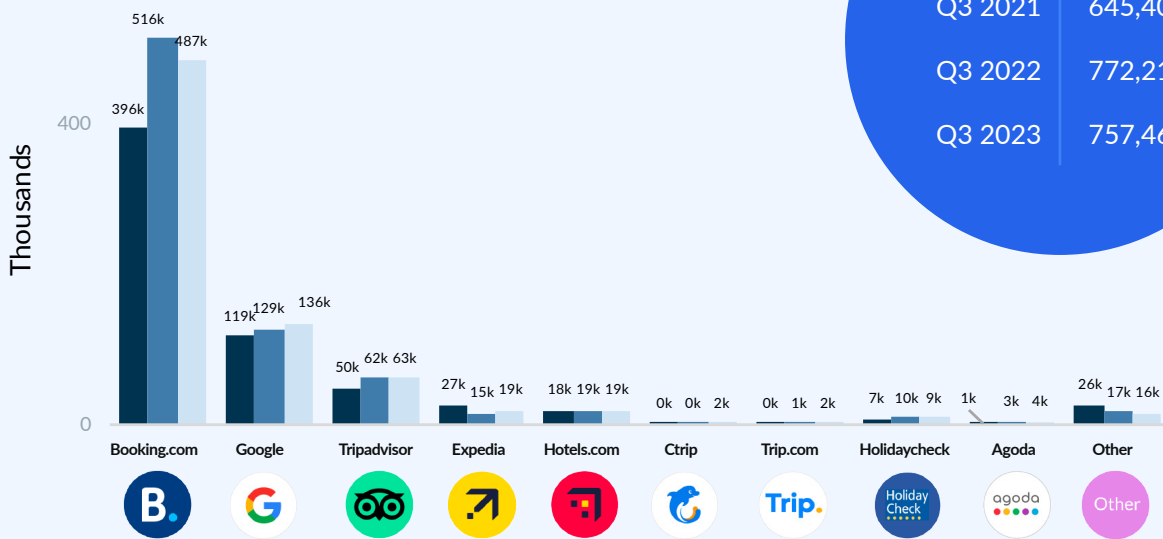
Shiji | REVIEWPRO

Europe: Review Volume

Europe: Review Volume per Source

A three-year comparison of online guest review volume, per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



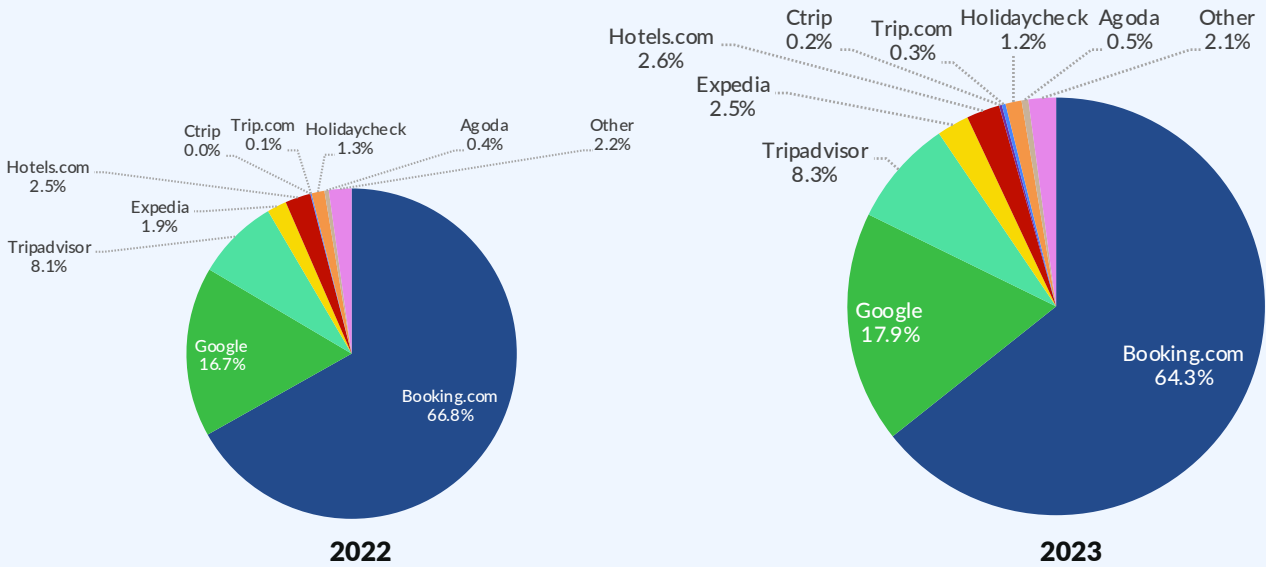
The Review volume collects reviews from 55 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.



Europe: Share of Reviews Per Source

Europe: Review Volume per Source

A YOY comparison of guest review market share per review source.



The review site/OTA market share percentage and changes are derived from a 9,500-hotel data set representing the six major global regions.

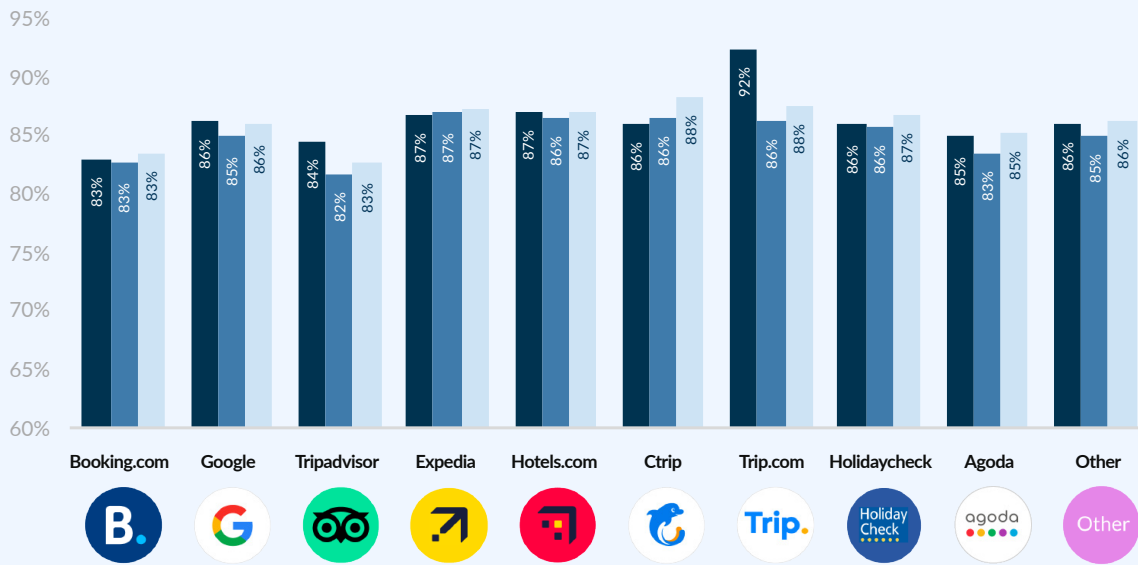


Europe: Review Source Indexes

Europe: Review Source Indexes

A three-year comparison of guest review indexes per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The review source scores are derived from Shiji ReviewPro's proprietary algorithm, from a 9,500-hotel data set representing the six major global regions.



Europe: Top 5 Categories Affecting GRI

Europe: Top Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.8	ROOM	-2.3
STAFF	0.7	CLEANLINESS	-1.5
ESTABLISHMENT	0.3	FOOD & DRINK	-1.4
CLEANLINESS	0.3	ESTABLISHMENT	-1.4
FOOD & DRINKS	0.3	VALUE	-1.1

Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE

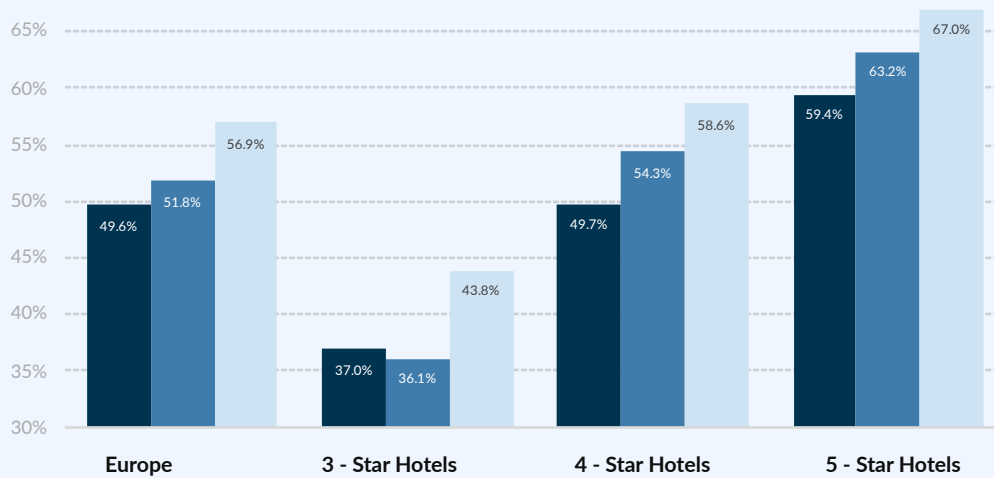

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Europe: Management Responses

Europe: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

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Europe: Management Responses

Europe: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



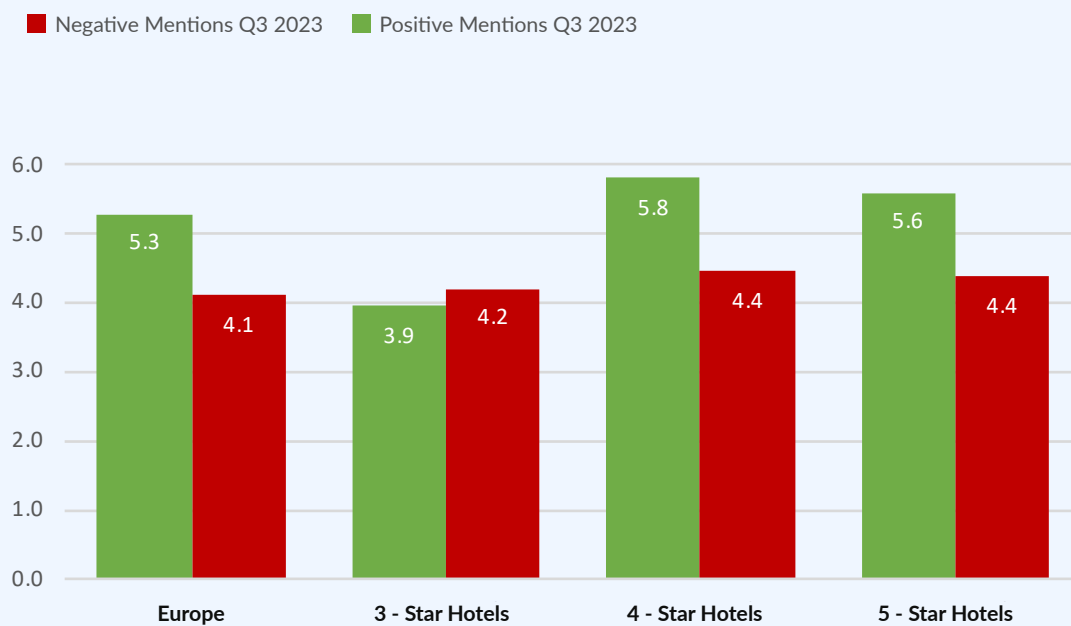
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Europe: Management Responses

Europe: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.



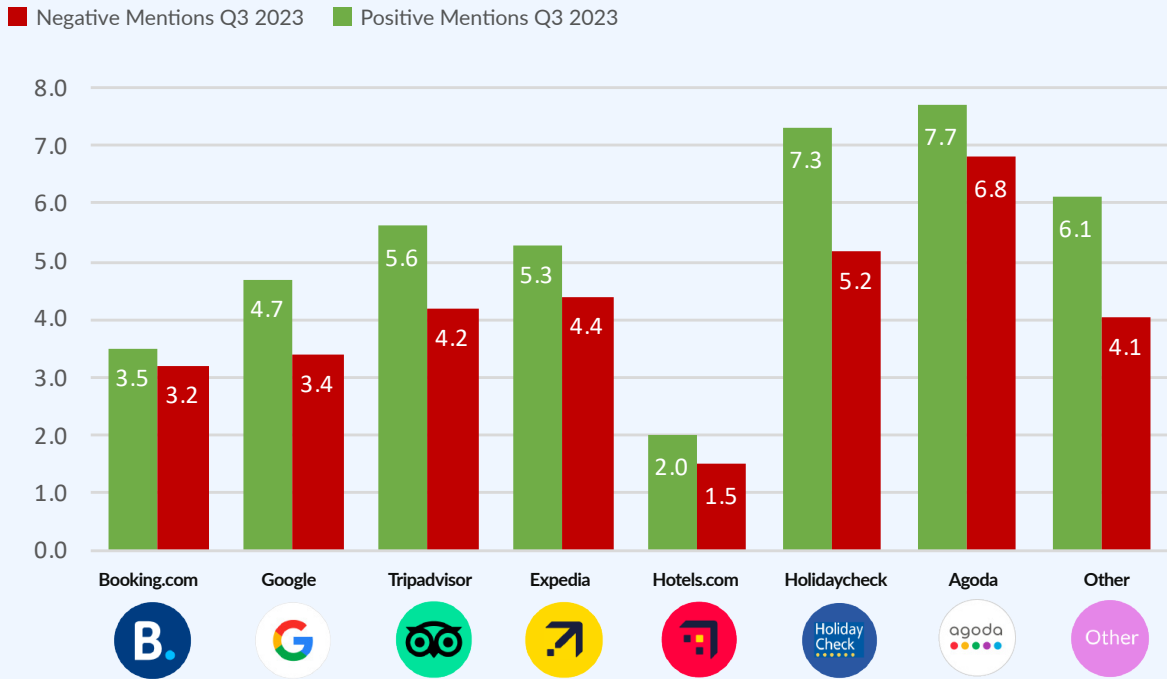
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Europe: Review Response Times per Review Source

The average number of days it took hotels to respond to positive and negative responsible online guest reviews in Q3 2023, per review source.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



CHAPTER 7



Europe: City Benchmark

Here we have selected 30 cities in the European region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

3-STAR HOTELS EUROPE

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
AMSTERDAM	78.9%	0.7	65.4%	0.6
ATHENS	80.9%	-0.1	71.8%	-0.1
BARCELONA	83.3%	1.6	70.8%	1.2
BERLIN	78.3%	1.3	68.4%	1.4
BRUSSELS	79.5%	-0.1	64.5%	-1.6
BUCHAREST	82.6%	0.4	71.7%	3.3
BUDAPEST	80.0%	0.7	67.6%	1.2
COPENHAGEN	80.1%	0.5	69.4%	0.7
DUBLIN	82.6%	1.7	67.8%	2.7
EDINBURGH	78.5%	-0.4	61.3%	-0.7
FLORENCE	81.2%	0.4	71.8%	0.2
HELSINKI	79.8%	2.1	71.4%	5.2
ISTANBUL	78.5%	1.6	71.9%	2.8
KRAKOW	85.1%	-0.1	73.2%	0.2
LISBON	82.2%	1.0	71.7%	2.5
LONDON	75.0%	1.6	64.2%	3.8
MADRID	82.8%	0.3	69.1%	-0.4
MANCHESTER	78.6%	0.3	61.9%	3.2
MILAN	78.8%	0.9	69.4%	0.7
MUNICH	79.9%	0.8	68.6%	2.0
OSLO	79.3%	0.2	68.7%	1.6
PARIS	81.1%	0.8	71.3%	1.5
PRAGUE	81.4%	0.5	69.7%	1.3
RIGA	78.7%	-0.9	65.6%	1.9
ROME	78.9%	0.4	68.3%	0.3
STOCKHOLM	78.3%	1.9	71.2%	2.9
VENICE	83.0%	0.4	71.1%	0.7
VIENNA	79.9%	-1.2	69.7%	-0.5
WARSAW	81.2%	-1.0	71.4%	1.1
ZURICH	80.7%	-0.3	69.3%	-0.9

CHAPTER 7

Europe: City Benchmark

Here we have selected 30 cities in the European region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

4-STAR HOTELS EUROPE

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
AMSTERDAM	83.7%	0.2	69.9%	1.6
ATHENS	86.1%	0.5	72.8%	0.2
BARCELONA	85.1%	1.1	71.5%	1.9
BERLIN	84.0%	1.3	70.8%	1.5
BRUSSELS	82.4%	0.1	67.0%	-0.9
BUCHAREST	85.0%	0.8	69.4%	1.8
BUDAPEST	85.2%	0.2	72.3%	-0.4
COPENHAGEN	83.5%	1.0	69.2%	1.7
DUBLIN	85.9%	1.5	71.1%	4.0
EDINBURGH	84.7%	0.7	67.4%	2.4
FLORENCE	86.5%	1.2	75.1%	2.4
HELSINKI	85.8%	0.9	75.4%	1.6
ISTANBUL	81.9%	2.9	74.9%	2.7
KRAKOW	89.3%	-0.5	80.1%	0.6
LISBON	86.6%	0.7	72.4%	2.0
LONDON	81.8%	1.8	68.4%	4.7
MADRID	87.6%	0.6	74.1%	1.2
MANCHESTER	86.0%	0.8	69.1%	1.7
MILAN	82.9%	1.0	68.5%	0.7
MUNICH	83.0%	1.4	70.9%	1.2
OSLO	84.4%	2.0	73.0%	3.1
PARIS	84.9%	0.8	74.2%	1.3
PRAGUE	86.0%	0.6	75.5%	1.9
RIGA	85.9%	0.5	72.4%	2.4
ROME	81.0%	-0.1	68.8%	0.3
STOCKHOLM	85.3%	1.5	75.0%	1.4
VENICE	88.9%	0.8	78.5%	1.6
VIENNA	85.5%	-0.1	73.4%	-0.7
WARSAW	86.0%	0.5	74.3%	1.2
ZURICH	83.6%	0.8	68.3%	-0.3

Europe: City Benchmark

Here we have selected 30 cities in the European region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

5-STAR HOTELS EUROPE

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
AMSTERDAM	86.9%	0.4	69.8%	1.2
ATHENS	87.8%	0.6	69.4%	-3.1
BARCELONA	88.3%	1.4	73.7%	2.8
BERLIN	88.5%	0.7	75.3%	1.7
BRUSSELS	84.8%	-2.0	68.3%	-0.5
BUCHAREST	89.7%	2.5	76.4%	5.5
BUDAPEST	92.1%	0.3	80.4%	2.5
COPENHAGEN	88.7%	0.4	75.3%	0.0
DUBLIN	90.1%	3.3	78.2%	7.1
EDINBURGH	87.5%	0.3	71.0%	0.6
FLORENCE	91.2%	0.7	80.1%	2.7
HELSINKI	90.0%	0.5	76.8%	3.1
ISTANBUL	86.7%	3.2	75.9%	4.4
KRAKOW	90.2%	0.1	80.2%	-0.8
LISBON	90.8%	1.2	78.1%	3.2
LONDON	88.4%	1.7	75.8%	4.1
MADRID	90.7%	0.0	76.6%	-0.9
MANCHESTER	87.3%	-1.3	72.1%	-2.3
MILAN	88.4%	2.5	74.7%	3.9
MUNICH	87.4%	1.1	72.0%	0.6
OSLO	88.6%	-0.5	76.6%	0.6
PARIS	86.6%	1.0	72.6%	1.5
PRAGUE	89.4%	1.0	77.4%	2.4
RIGA	86.3%	0.0	74.4%	2.2
ROME	87.4%	0.6	72.4%	0.0
STOCKHOLM	89.9%	0.5	74.4%	-0.4
VENICE	91.3%	2.1	77.1%	5.5
VIENNA	89.4%	0.9	74.8%	2.0
WARSAW	91.0%	-0.2	76.1%	1.0
ZURICH	88.7%	0.5	76.8%	2.6

CHAPTER 7

London / Berlin – City Hotel Ranking

3-STAR HOTELS LONDON

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	The Fox & Goose Hotel	3	92.9%	0.1	1740
2	Rose And Crown Hotel	4	92.9%	0.6	145
3	Staycity Aparthotels Greenwich High Road	2	92.3%	0.0	776
4	ibis London Canning Town	3	91.7%	0.3	1581
5	Coach & Horses Hotel	3	91.4%	0.1	302
6	Ruby Zoe Hotel London	NEW	90.6%	---	505
7	Glenlyn Hotel	5	89.6%	0.1	186
8	The White Hart Hotel	3	89.2%	-1.0	622
9	hub by Premier Inn London Tower Bridge hotel	10	89.2%	0.9	161
10	The Brewers Inn	5	89.0%	-0.2	192
11	The Sanctuary House Hotel	NEW	88.7%	---	501
12	The Mad Hatter Hotel	1	88.6%	-0.7	841
13	Premier Inn London Wandsworth	-3	88.6%	-1.9	125
14	The Rokxy Townhouse - Kings Cross	NEW	87.8%	---	239
15	Bingham Riverhouse	NEW	87.7%	---	181
16	Orange Tree	NEW	87.7%	---	137
17	Greyhound Hotel	NEW	87.6%	---	243
18	hub by Premier Inn London Westminster, St James's Park hotel	-9	87.6%	-3.3	183
19	Premier Inn London County Hall	NEW	87.5%	---	472
20	The Windmill	NEW	87.4%	---	468

3-STAR HOTELS BERLIN

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Hotel Rotdorn	NEW	91.4%	NEW	147
2	Hotel Nikolai Residence	NEW	90.3%	NEW	490
3	Luxury Apartments in Berlin - Luka's apartments by Arbio	NEW	90.0%	NEW	200
4	Hotel Brandies Berlin	NEW	89.8%	NEW	441
5	Premier Inn Berlin Airport	NEW	89.3%	NEW	1476
6	Grimm's Potsdamer Platz	NEW	88.7%	NEW	1647
7	Bölsche Hotel	NEW	88.7%	NEW	132
8	Motel One Berlin-Spittelmarkt	NEW	88.5%	NEW	1618
9	Hotel Spree-idyll	NEW	88.2%	NEW	283
10	Hotel Art Nouveau	NEW	88.2%	NEW	258
11	Anna 1908	NEW	88.1%	NEW	482
12	Motel One Berlin-Alexanderplatz	NEW	88.0%	NEW	3582
13	Monbijou Hotel	NEW	87.6%	NEW	688
14	CALMA Berlin Mitte	NEW	87.6%	NEW	546
15	Hotel Vita Berlin	NEW	87.6%	NEW	248
16	Hotel Elba am Kurfürstendamm - Design Chambers	NEW	87.3%	NEW	339
17	Motel One Berlin-Upper West	NEW	87.2%	NEW	1999
18	ArtHotel Connection	NEW	87.1%	NEW	160
19	Motel One Berlin-Hauptbahnhof	NEW	87.0%	NEW	2556
20	Hampton by Hilton Berlin City East Side Gallery	NEW	87.0%	NEW	1635

CHAPTER 7



4-STAR HOTELS LONDON

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	The Resident Covent Garden	0	95.8%	0.6	485
2	Cheval Harrington Court at South Kensington	NEW	95.3%	---	127
3	Wilde Aparthotels by Staycity - Covent Garden	0	94.6%	-0.2	1735
4	Wilde Aparthotels by Staycity London Paddington	-2	94.5%	-0.3	2744
5	St. Ermin's Hotel, Autograph Collection	-1	94.5%	0.0	883
6	Staybridge Suites London-Vauxhall, an IHG Hotel	2	93.8%	0.9	405
7	The Rookery Hotel	7	93.7%	1.7	235
8	The Resident Victoria	-3	93.6%	0.2	627
9	Lost Property St Paul's London - Curio Collection by Hilton	-2	93.4%	0.4	427
10	Wilde Aparthotels by Staycity London Aldgate Tower Bridge	-4	93.2%	0.1	1202
11	Room2 Chiswick Hometel	-2	93.0%	0.2	556
12	Hotel The Hide London	NEW	92.8%	---	660
13	Blackbird	0	92.7%	0.6	231
14	Cove Landmark Pinnacle	-3	92.6%	0.0	283
15	The Chesterfield Mayfair	1	92.5%	0.6	882
16	Hilton London Tower Bridge	-4	92.4%	0.1	918
17	9 Hertford Street	NEW	92.3%	---	112
18	The Lincoln Suites	NEW	91.6%	---	638
19	Collingham Serviced Apartments	-4	91.6%	-0.4	123
20	The Montague On The Gardens	NEW	91.5%	---	863

4-STAR HOTELS BERLIN

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Brilliant Apartments	NEW	95.3%	NEW	110
2	The Circus Apartments	NEW	94.8%	NEW	103
3	Wilmina Hotel	NEW	94.0%	NEW	399
4	Downtown Apartments Mitte	NEW	93.5%	NEW	280
5	ADELANTE Boutique Hotel	NEW	93.0%	NEW	267
6	Wilde Aparthotels by Staycity, Berlin, Checkpoint Charlie	NEW	92.0%	NEW	444
7	Casa Camper Berlin	NEW	92.0%	NEW	357
8	Garden Living - Boutique Hotel	NEW	91.2%	NEW	243
9	The Mandala Suites	NEW	91.0%	NEW	617
10	The Circus Hotel	NEW	90.8%	NEW	213
11	Mercure Hotel Berlin Wittenbergplatz	NEW	90.6%	NEW	1260
12	Myer's Hotel - Berlin	NEW	90.0%	NEW	279
13	Adapt Apartments Berlin	NEW	89.5%	NEW	1150
14	Clipper Boardinghouse - Berlin-Gendarmenmarkt	NEW	89.5%	NEW	481
15	Townhouse Berlin	NEW	89.4%	NEW	408
16	Adina Apartment Hotel Berlin Checkpoint Charlie	NEW	89.1%	NEW	609
17	Garden Boutique Hotel	NEW	89.0%	NEW	168
18	Holiday Inn Berlin City Center East Prenzlauer Berg, an IHG Hotel	NEW	88.8%	NEW	720
19	Capri by Fraser Berlin	NEW	88.7%	NEW	617
20	Adina Apartment Hotel Berlin Mitte	NEW	88.6%	NEW	919

CHAPTER 7



5-STAR HOTELS LONDON

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Hotel 41	0	97.7%	0.5	282
2	Brown's Hotel, a Rocco Forte Hotel	3	96.3%	0.5	178
3	Egerton House	5	95.9%	0.8	255
4	Claridges	-1	95.8%	-0.7	469
5	The Soho Hotel, Firmdale Hotels	2	95.7%	0.2	178
6	The Beaumont	7	95.7%	0.9	130
7	Bankside Hotel, Autograph Collection	-3	95.4%	-0.9	238
8	The Savoy	1	95.2%	0.2	1021
9	Hotel Cafe Royal	-7	95.2%	-1.5	223
10	L'oscar London	5	95.2%	0.5	181
11	The Connaught	8	95.1%	0.6	223
12	The Lanesborough, Oetker Collection	NEW	95.0%	---	232
13	Milestone Hotel Kensington	7	94.9%	0.5	343
14	Batty Langley's	0	94.9%	0.2	228
15	Covent Garden Hotel, Firmdale Hotels	NEW	94.9%	---	114
16	One Aldwych	-10	94.6%	-1.1	247
17	Pan Pacific London	1	94.5%	0.0	984
18	Cheval Three Quays at The Tower of London	-8	94.5%	-0.4	298
19	Corinthia Hotel London	NEW	94.4%	---	334
20	Shangri-La Hotel, At The Shard, London	-4	94.3%	-0.3	1163

5-STAR HOTELS BERLIN

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Hotel am Steinplatz, Autograph Collection	NEW	94.5%	NEW	178
2	Orania.Berlin	NEW	93.5%	NEW	209
3	Hotel Adlon Kempinski	NEW	93.4%	NEW	1366
4	Regent Berlin, an IHG Hotel	NEW	93.2%	NEW	231
5	Gorki Apartments	NEW	92.5%	NEW	123
6	KPM Hotel Residences	NEW	91.7%	NEW	715
7	The Mandala Hotel	NEW	91.7%	NEW	642
8	Grand Hyatt Berlin	NEW	91.3%	NEW	964
9	InterContinental Berlin, an IHG Hotel	NEW	90.7%	NEW	1192
10	Hotel Palace Berlin	NEW	90.1%	NEW	1357
11	Steigenberger Hotel Am Kanzleramt	NEW	89.9%	NEW	2351
12	Apartments Rosenthal Residence	NEW	89.7%	NEW	318
13	The Ritz-Carlton, Berlin	NEW	88.9%	NEW	484
14	The Westin Grand Berlin	NEW	88.8%	NEW	1902
15	DoubleTree by Hilton Berlin Ku'Damm	NEW	88.5%	NEW	434
16	Berlin Marriott Hotel	NEW	88.4%	NEW	1054
17	Rocco Forte Hotel De Rome Berlin	NEW	88.4%	NEW	103
18	Titanic Gendarmenmarkt Berlin	NEW	88.1%	NEW	1794
19	Hotel Luc, Autograph Collection	NEW	88.0%	NEW	343
20	Boutique Hotel Château Royal	NEW	87.4%	NEW	419



Guest
Experience
Benchmark

Latin America & Caribbean

CHAPTER

08



CHAPTER 8

Latin America & Caribbean: Market Overview

After a stronger-than-expected recovery from the pandemic, economic growth in Latin America and the Caribbean has softened and inflation is starting to ease.⁷ The pace of recovery has varied broadly by country, with economic and political disruptions affecting hotel demand in some regions. In the Caribbean, the hurricane season has been relatively mild so far, and demand has remained strong, in part due to a blurring between seasonal lines, with summer transforming into the region's new high season.⁸

- Economic growth has softened in the region
- Summer demand in the Caribbean surged
- Hotels achieved a review score of **86.4%**, the second highest of the six regions
- Review volume grew by **24.8%**
- Hotels responded to **56.3%** of reviews

International arrival volume into South America is anticipated to reach pre-pandemic levels by the end of this year, although many countries on the continent are highly dependent on neighbouring countries for visitors. Last year, Colombia surpassed Brazil and Argentina as the most popular South American destination.⁹

Hotels in the Latin America & Caribbean region achieved a Global Review Index of 86.4% in Q3 2023, the second highest of the six regions and an increase of 1.0 points over Q3 2022.

Review volume grew by 24.8%. Google generated almost half of reviews in the region, at 47.6%, an increase of 16.5 points over the same quarter in 2022. Meanwhile, Booking.

com lost 11.6 points in review share, generating 29.6% of reviews. Tripadvisor accounted for 12.8% of review share and Expedia 6.9%.

Hoteliers in the region responded to 56.3% of reviews, a decrease of 4.1 points over Q3 2022 and 6.2 points lower than the global average. Unlike in other regions, hotels in the Latin America & Caribbean region responded to slightly more negative reviews (58.6%) than positive reviews (56.0%). On average, it took 5.0 days to respond to positive reviews and 6.1 days to respond to negative reviews.

⁷ International Monetary Fund. [Latin America and the Caribbean: Recent Developments, Outlook, and Policies](#). October 2023.

⁸ Bloomberg. [There's No Such Thing as Low Season in the Caribbean Anymore](#). April 2023.

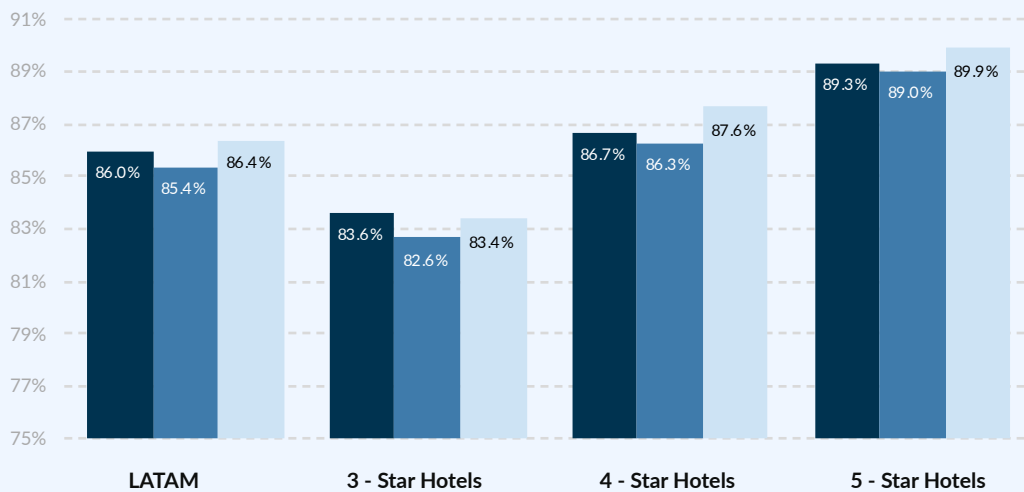
⁹ GlobalData. [South America Destination Tourism Trends Insight](#). June 2023.23.

Latin America & Caribbean: GRI Metrics

LATAM: Global Review Index™ (GRI)

A three year comparison of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 (OTAs) and review sites in over 45 languages.

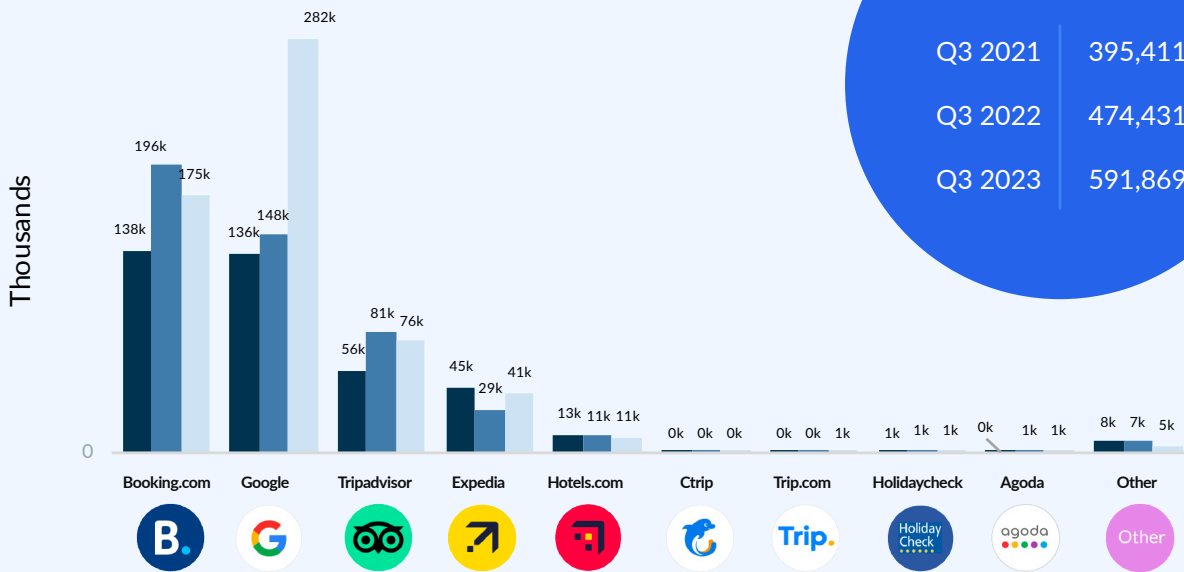


Latin America & Caribbean: Review Volume

LATAM: Review Volume per Source

A three-year comparison of online guest review volume, per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



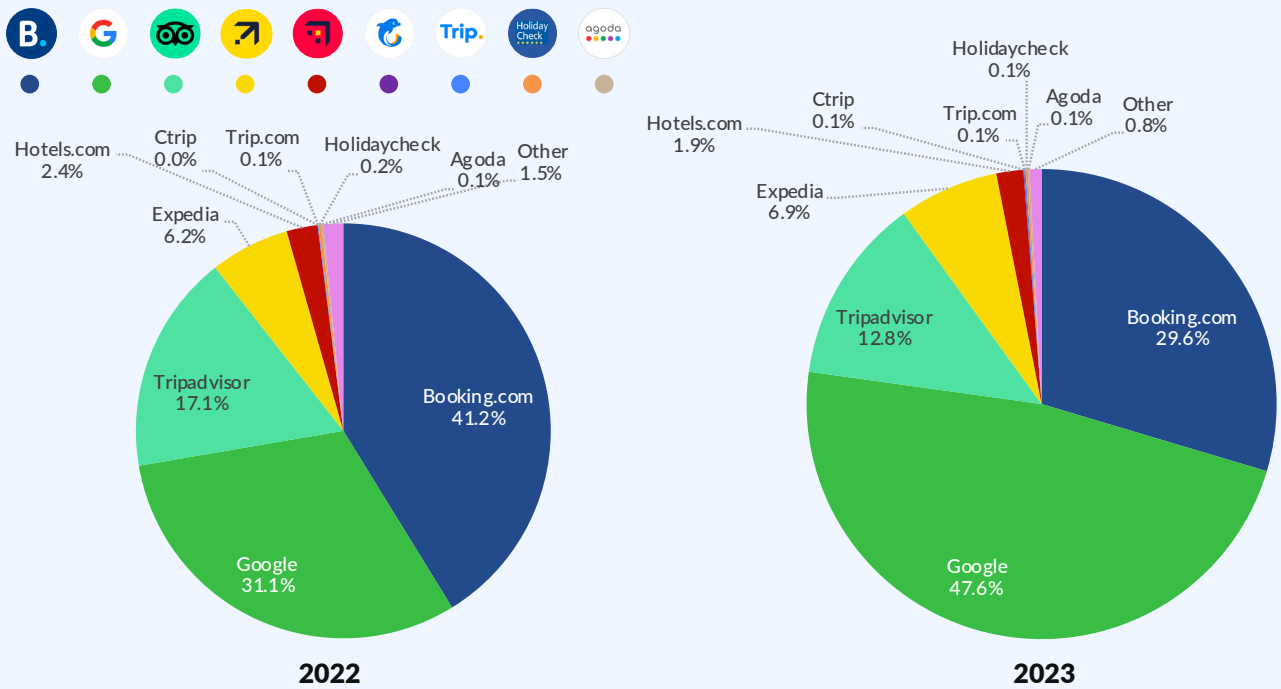
The Review volume collects reviews from 55 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.



Latin America & Caribbean: Share of Reviews Per Source

LATAM: Review Volume per Source

A YOY comparison of guest review market share per review source.



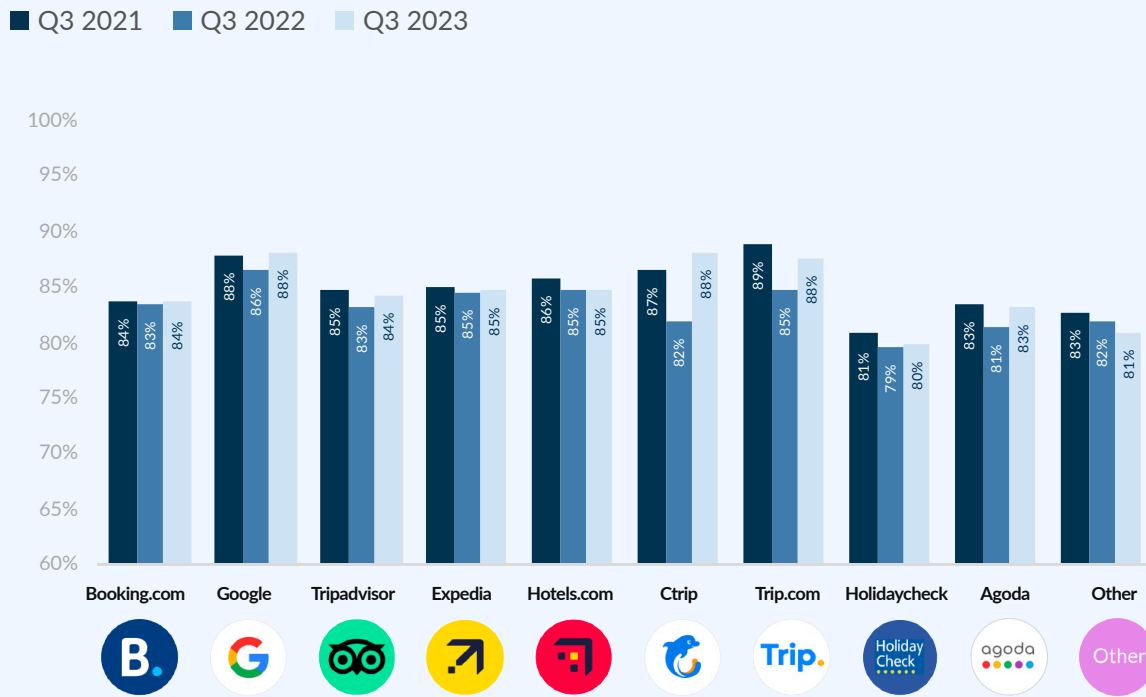
The review site/OTA market share percentage and changes are derived from a 9,500-hotel data set representing the six major global regions.



Latin America & Caribbean: Review Source Indexes

LATAM: Review Source Indexes

A three-year comparison of guest review indexes per review source.



The review source scores are derived from Shiji ReviewPro's proprietary algorithm, from a 9,500-hotel data set representing the six major global regions.



Latin America & Caribbean: 5 Categories Affecting GRI

Latin America & Caribbean: Top Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

CATEGORY		POSITIVE	CATEGORY		NEGATIVE
EXPERIENCE		0.8	ROOM		-1.9
ENTERTAINMENT		0.5	FOOD & DRINKS		-1.6
STAFF		0.4	ESTABLISHMENT		-1.4
FOOD & DRINKS		0.3	CLEANLINESS		-1.3
ROOM		0.2	EXPERIENCE		-1.2

Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE

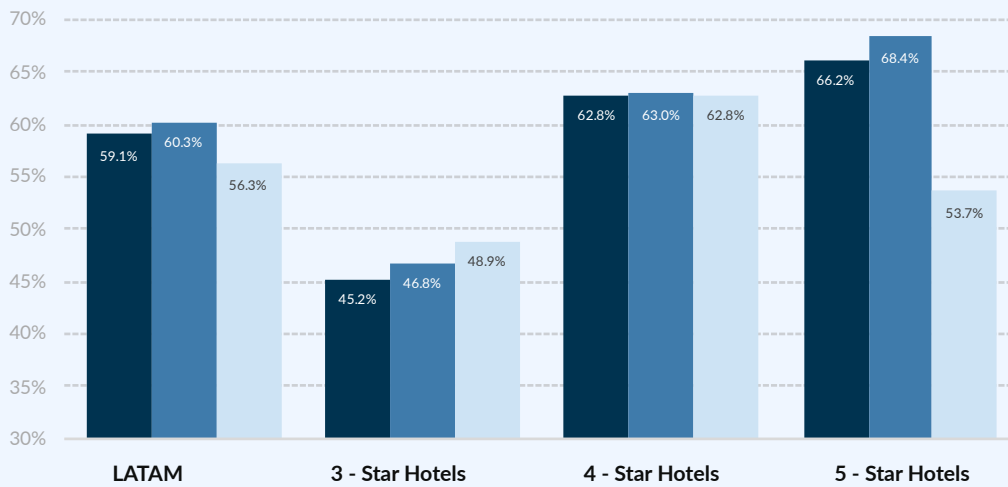


Latin America & Caribbean: Management Responses

LATAM: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Latin America & Caribbean: Management Responses

LATAM: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Latin America & Caribbean: Management Responses

LATAM: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.

■ Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



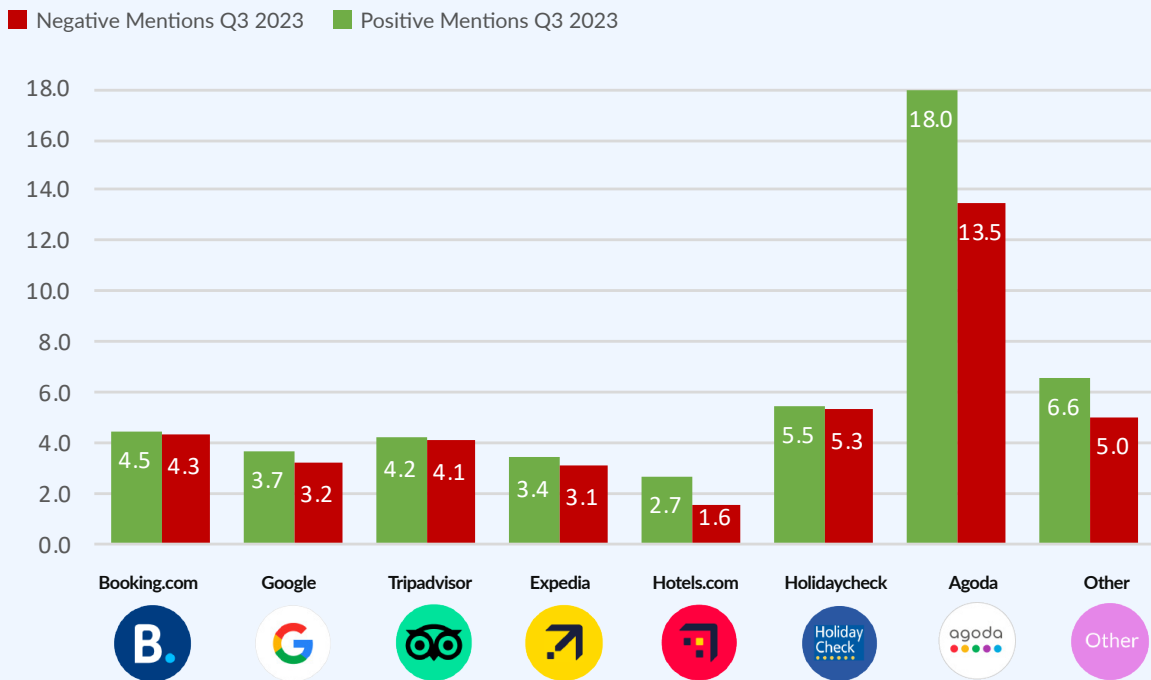
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Latin America & Caribbean: Management Responses

LATAM: Review Response Times per Review Source

The average number of days it took hotels to respond to positive and negative responsible online guest reviews in Q3 2023, per review source.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



CHAPTER 8

Latin America & Caribbean: City Benchmark

Here we have selected 7 cities in the Latin America & Caribbean region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

3-STAR HOTELS LATAM

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
BOGOTA	82.3%	-1.2	65.1%	1.1
BUENOS AIRES	79.7%	0.6	60.2%	2.1
LIMA	86.6%	3.1	79.1%	8.3
MEXICO CITY	82.8%	-0.1	63.6%	0.7
RIO DE JANEIRO	81.2%	0.0	59.7%	3.4
SANTIAGO	83.0%	2.1	63.4%	5.3
SAO PAULO	82.7%	1.4	65.6%	6.1

4-STAR HOTELS LATAM

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
BOGOTA	88.3%	0.0	74.8%	3.4
BUENOS AIRES	83.7%	1.4	64.5%	3.3
LIMA	89.5%	2.0	85.6%	8.3
MEXICO CITY	86.3%	0.5	70.4%	3.4
RIO DE JANEIRO	86.5%	1.2	67.8%	5.9
SANTIAGO	87.2%	1.2	66.6%	3.4
SAO PAULO	86.1%	1.7	80.1%	17.3

5-STAR HOTELS LATAM

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
BOGOTA	89.3%	0.1	76.9%	3.7
BUENOS AIRES	89.6%	0.2	73.1%	3.2
LIMA	92.0%	2.1	90.9%	5.6
MEXICO CITY	89.4%	0.7	79.3%	10.0
RIO DE JANEIRO	92.4%	2.3	85.7%	17.9
SANTIAGO	90.7%	2.1	76.8%	6.3
SAO PAULO	93.7%	2.7	93.0%	18.1

CHAPTER 8



Rio de Janeir / Mexico City – City Hotel Ranking

3-STAR HOTELS RIO DE JANEIRO

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	B&B HOTEL Rio de Janeiro Norte	2	92.9%	3.9	1638
2	Ipanema Inn	0	91.0%	0.3	422
3	Ramada Rio de Janeiro Recreio	5	90.9%	3.8	1426
4	B&B Hotels Rio Copacabana Posto 5	3	89.9%	2.6	691
5	Windsor Copa Hotel	-1	89.7%	1.2	1233
6	Best Western Plus Copacabana Design Hotel	NEW	88.3%	---	786
7	Ibis Rio de Janeiro Nova America	4	88.2%	2.6	809
8	TRYP By Wyndham Rio De Janeiro Barra Parque Olimpico	-2	88.2%	0.9	670
9	Linx Galeao	7	88.1%	3.0	3675
10	Fluminense Hotel	0	87.6%	1.3	621
11	Ibis Rio de Janeiro Parque Olimpico	NEW	87.4%	---	1518
12	Elegance Praia Hotel	-7	87.3%	0.0	870
13	Hotel Regina	0	87.3%	2.1	767
14	Windsor Martinique Hotel	-5	87.3%	0.8	727
15	Petit Rio Hotel	-1	87.0%	1.8	593
16	KS Beach Hotel	NEW	86.9%	---	251
17	Entremares Hotel	0	86.6%	1.7	229
18	Saionara Hotel	-6	86.5%	1.0	654
19	B&B Hotels RJ Copacabana Forte	NEW	86.3%	---	1431
20	Windsor Asturias Hotel	-5	86.0%	0.8	542

3-STAR HOTELS MEXICO CITY

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Holiday Inn Mexico Dali Airport, an IHG Hotel	NEW	95.0%	NEW	361
2	Hotel Marti	NEW	91.8%	NEW	1842
3	Hotel Maria Rico	NEW	90.4%	NEW	314
4	Hotel Harare	NEW	90.1%	NEW	187
5	Hotel Clé Reforma Insurgentes	NEW	89.9%	NEW	342
6	Fairfield Inn & Suites by Marriott Mexico City Vallejo	NEW	89.8%	NEW	360
7	Condesa Suites	NEW	89.1%	NEW	228
8	One Ciudad De Mexico La Raza	NEW	89.0%	NEW	443
9	Four Points by Sheraton Mexico City, Colonia Roma	NEW	88.3%	NEW	153
10	Hotel Brasilia	NEW	87.9%	NEW	133
11	Hotel Max	NEW	87.7%	NEW	171
12	One Ciudad De Mexico Alameda	NEW	87.6%	NEW	495
13	Fiesta Inn Ecatepec	NEW	87.4%	NEW	354
14	Hotel Roble	NEW	87.3%	NEW	687
15	Hotel Principal	NEW	87.0%	NEW	771
16	Hotel San Diego	NEW	86.9%	NEW	100
17	Hotel Castropol	NEW	86.8%	NEW	988
18	Hotel Templo Mayor	NEW	86.5%	NEW	582
19	Hotel Fleming	NEW	86.2%	NEW	194
20	Hotel Oslo	NEW	85.9%	NEW	180

CHAPTER 8



4-STAR HOTELS RIO DE JANEIRO

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Novotel Rio de Janeiro Leme	0	94.2%	1.3	1925
2	Le Relais de Marambaia	NEW	93.7%	---	508
3	PortoBay Rio de Janeiro	1	93.4%	2.5	1770
4	Hotel Arpoador	5	92.8%	3.4	539
5	Windsor Oceanico	0	92.3%	2.5	2137
6	Windsor California Hotel	-3	92.3%	1.1	1501
7	Vila Gale Rio de Janeiro	5	92.2%	3.1	2456
8	Windsor Leme Hotel	-6	92.0%	0.6	965
9	Venit Mio Hotel	11	91.8%	3.7	383
10	Orla Copacabana Hotel	-4	91.5%	2.0	1767
11	Intercity Rio de Janeiro Porto Maravilha	5	91.4%	2.6	1343
12	Promenade Palladium	6	91.3%	2.8	610
13	Windsor Guanabara Hotel	0	90.9%	1.8	906
14	Atlantico Sul Hotel	-6	90.8%	1.4	622
15	Novotel Rio De Janeiro Parque Olimpico	-4	90.7%	1.5	671
16	CDesign Hotel	-2	90.6%	1.7	1455
17	Hotel Laghetto Stilo Barra Rio	NEW	90.4%	---	1360
18	Scorial Rio Hotel	-11	90.2%	0.7	1118
19	Windsor Tower Hotel	-4	89.8%	0.9	893
20	Brisa Barra Hotel	NEW	89.6%	---	2944

4-STAR HOTELS MEXICO CITY

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	La Valise Mexico City	NEW	98.6%	NEW	377
2	Historico Central Boutique Hotel	NEW	97.0%	NEW	1159
3	La Palomilla Bed & Breakfast	NEW	96.7%	NEW	236
4	Zocalo Central & Rooftop Mexico City	NEW	95.9%	NEW	1215
5	Hacienda Pena Pobre	NEW	95.6%	NEW	197
6	Isaaya Hotel Boutique by WTC	NEW	95.2%	NEW	134
7	Be Mate Santa Fe	NEW	95.2%	NEW	113
8	Be Mate Masaryk	NEW	94.6%	NEW	173
9	Hotel Catedral	NEW	94.4%	NEW	1000
10	Suites Perisur Apartamentos Amueblados	NEW	94.1%	NEW	149
11	Hotel Riazor Aeropuerto	NEW	93.9%	NEW	1049
12	Be Mate Condesa Hipodromo	NEW	93.7%	NEW	134
13	Hotel Novit	NEW	92.9%	NEW	208
14	Umbral, Curio Collection by Hilton	NEW	92.9%	NEW	123
15	Hotel Flamencos	NEW	92.7%	NEW	563
16	Kali Escandon Mexico City	NEW	92.5%	NEW	443
17	Hotel Casa Gonzalez	NEW	92.4%	NEW	210
18	Hotel Villa Condesa	NEW	92.2%	NEW	125
19	Hyatt House Mexico City/Santa Fe	NEW	92.1%	NEW	522
20	Hotel Abastos Plaza	NEW	92.0%	NEW	214

CHAPTER 8

5-STAR HOTELS RIO DE JANEIRO

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Belmond Copacabana Palace	0	99.5%	0.9	17350
2	Santa Teresa Hotel RJ - MGallery	0	97.1%	2.3	487
3	Hilton Barra Rio de Janeiro	0	97.0%	3.5	10312
4	Hotel Fasano Rio de Janeiro	1	96.5%	3.1	1049
5	Vila Santa Teresa	-1	96.1%	2.6	297
6	Fairmont Rio de Janeiro Copacabana	1	95.8%	3.2	2166
7	Emiliano Rio	1	94.2%	1.9	628
8	Miramar Hotel by Windsor	-2	94.1%	0.8	2351
9	Sheraton Grand Rio Hotel & Resort	2	93.6%	3.5	4266
10	Grand Hyatt Rio de Janeiro	-1	93.6%	2.1	2313
11	Yoo2 Rio de Janeiro by Intercity	2	92.9%	4.4	1424
12	Windsor Marapendi	0	92.7%	2.9	2224
13	JW Marriott Hotel Rio de Janeiro	2	92.2%	5.8	1716
14	Hilton Rio De Janeiro Copacabana	-4	92.1%	1.6	8324
15	Windsor Barra Hotel	-1	89.6%	1.7	1391
16	Rio Othon Palace	1	88.0%	4.3	4536
17	Hotel Nacional Rio de Janeiro	-1	87.9%	4.0	2529
18	Grand Mercure Rio de Janeiro Copacabana	0	85.7%	3.8	854
19	LSH By OWN	0	84.4%	4.8	1112
20	---	---	---	---	---

5-STAR HOTELS MEXICO CITY

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Sofitel Mexico City Reforma	NEW	98.1%	NEW	2800
2	Four Seasons Hotel Mexico City	NEW	96.8%	NEW	3595
3	Gran Hotel Ciudad de Mexico	NEW	96.7%	NEW	1546
4	The St. Regis Mexico City	NEW	96.7%	NEW	1320
5	Las Alcobas, a Luxury Collection Hotel, Mexico City	NEW	96.6%	NEW	321
6	JW Marriott Hotel Mexico City Polanco	NEW	96.2%	NEW	5942
7	Live Aqua Urban Resort Mexico	NEW	95.9%	NEW	294
8	The Ritz-Carlton, Mexico City	NEW	95.8%	NEW	3933
9	Hotel Marquis Reforma	NEW	95.7%	NEW	2638
10	Casa Polanco Hotel Boutique	NEW	95.6%	NEW	391
11	The Wild Oscar	NEW	95.4%	NEW	892
12	Fiesta Americana Viaducto Aeropuerto	NEW	94.8%	NEW	1037
13	Fiesta Americana Ciudad de Mexico Toreo	NEW	94.6%	NEW	180
14	Hilton Mexico City Reforma	NEW	94.4%	NEW	1331
15	InterContinental Presidente Mexico City, an IHG Hotel	NEW	94.1%	NEW	1330
16	Dominion Polanco	NEW	94.0%	NEW	544
17	Hyatt Regency Mexico City	NEW	93.9%	NEW	1569
18	Grand Fiesta Americana Chapultepec	NEW	93.8%	NEW	446
19	Sheraton Mexico City Maria Isabel Hotel	NEW	93.6%	NEW	3849
20	The Alest Hotel	NEW	93.5%	NEW	812



Guest
Experience
Benchmark

Middle East

CHAPTER

08



Middle East: Market Overview

The hotel market in the Middle East has emerged as the strongest in the world in terms of financial performance, according to STR. In September, the year-to-date average room rate was U.S. \$160, compared to \$142 for U.S. hotels, \$141 for European hotels,¹⁰ and \$90 for Asia Pacific hotels. And hotel rates continue to rise, propelled by strong demand in the region.

- Growth remains strong in the Middle East hotel market
- The Global Review Index was **83.8%**, the lowest of the six regions
- The gap in GRI between 3-star and 5-star hotels was the widest in any region
- Review volume grew by **13.9%**
- Hotels responded to **78.7%** of reviews, the highest of the six regions

The Middle East is also one of the world's fastest-growing tourism destinations. While hotel development slowed in other regions in the wake of the pandemic, development in the Middle East is now at an historic high, led by Saudi Arabia and United Arab Emirates.

As for online reputation, the region hasn't fared as well. In Q3 2023, the Middle East had the lowest Global Review Index of the six regions, at 83.8%, 1.6 points below the global average, a pattern consistent in previous quarters. However, the GRI is moving in the right direction, having increased by 1.5 points since Q3 2022 and by 3.3 points since Q3 2021.

Notably, the gap in GRI was wider across hotel segments in the Middle East than in any other region. The GRI for 3-star hotels was 77.9% – the only region to fall below 80%. For 4-star hotels it was 81.0%, also much lower than in other regions. And yet 5-star hotels achieved a GRI of 90.2%, the second highest of the six regions.

Review volume grew by 13.9%, with Google's volume surging by a remarkable 40.3% over the same quarter in 2022, while Booking.com volume remained relatively flat. Still, Booking.com generated over half of review market share in the quarter (50.5%), whereas Google accounted for 36.7%. Tripadvisor generated 8.1% of reviews.

Hoteliers responded to a remarkable 78.7% of reviews, the highest proportion of any region and 16.2 points above the global average. Positive reviews received a response rate of 81.5% and negative reviews 62.9%. Clearly, hoteliers are paying close attention to reviews; the next challenge is to use the insights from guest feedback to improve the GRI within the 4- and 5-star segments.

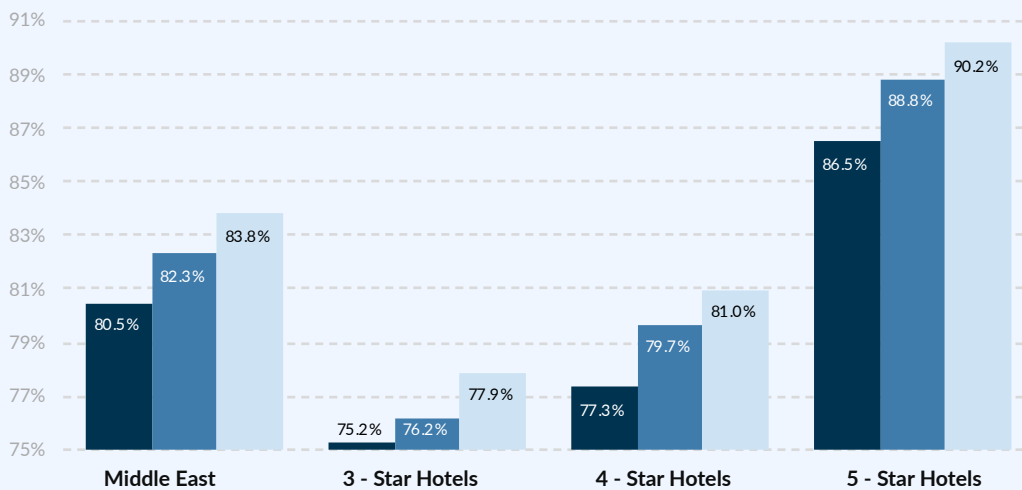
¹⁰ The National News. [Middle East's hospitality sector is strongest in the world, STR says](#). September 2023.

Middle East: GRI Metrics

Middle East: Global Review Index™ (GRI)

A three year comparison of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 (OTAs) and review sites in over 45 languages.



Middle East: Review Volume

Middle East: Review Volume per Source

A three-year comparison of online guest review volume, per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



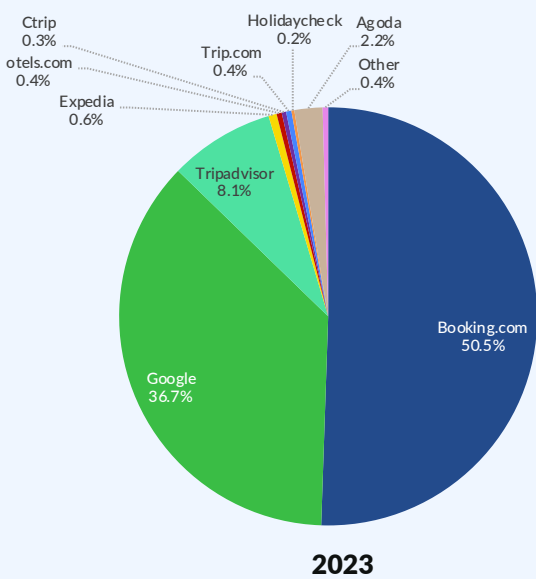
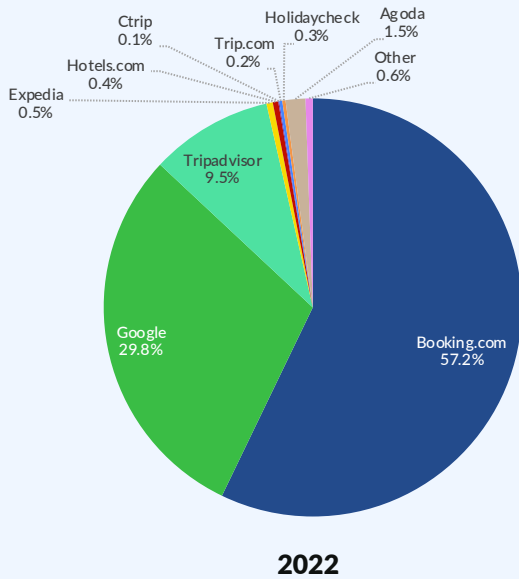
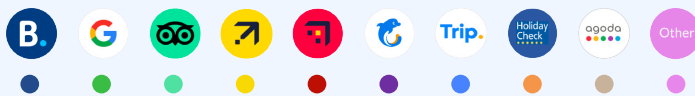
The Review volume collects reviews from 55 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.



Middle East: Share of Reviews Per Source

Middle East: Review Volume per Source

A YOY comparison of guest review market share per review source.



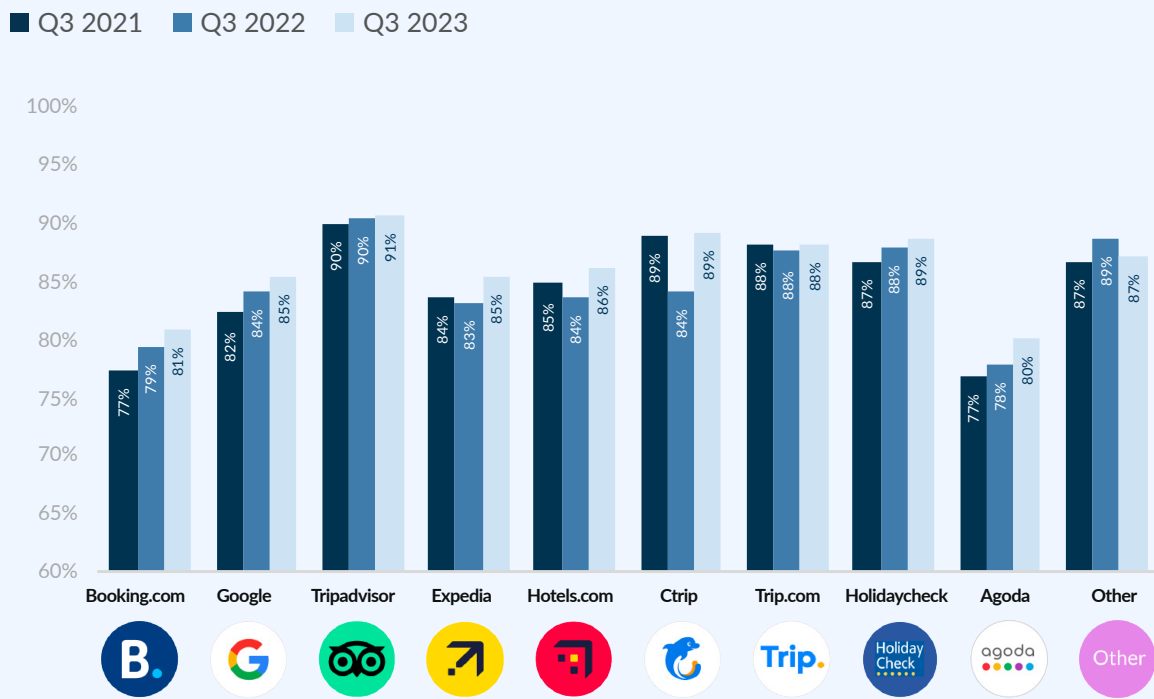
The review site/OTA market share percentage and changes are derived from a 9,500-hotel data set representing the six major global regions.



Middle East: Review Source Indexes

Middle East: Review Source Indexes

A three-year comparison of guest review indexes per review source.



The review source scores are derived from Shiji ReviewPro's proprietary algorithm, from a 9,500-hotel data set representing the six major global regions.



Middle East: Top 5 Categories Affecting GRI

Middle East: Top Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	1.1	ROOM	-1.4
STAFF	0.9	CLEANLINESS	-1.1
SERVICE	0.9	ESTABLISHMENT	-0.9
ESTABLISHMENT	0.7	STAFF	-0.7
CLEANLINESS	0.6	EXPERIENCE	-0.7

Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE

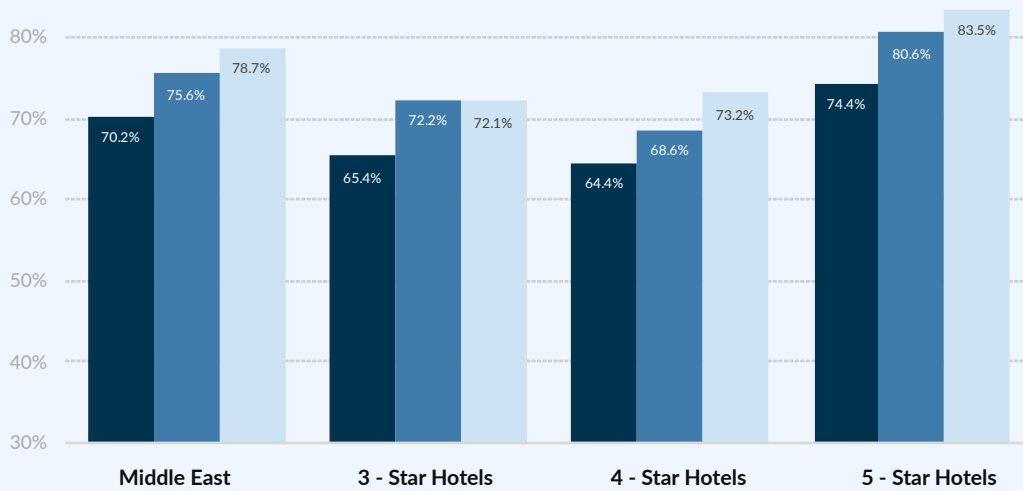


Middle East: Management Responses

Middle East: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Middle East: Management Responses

Middle East: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



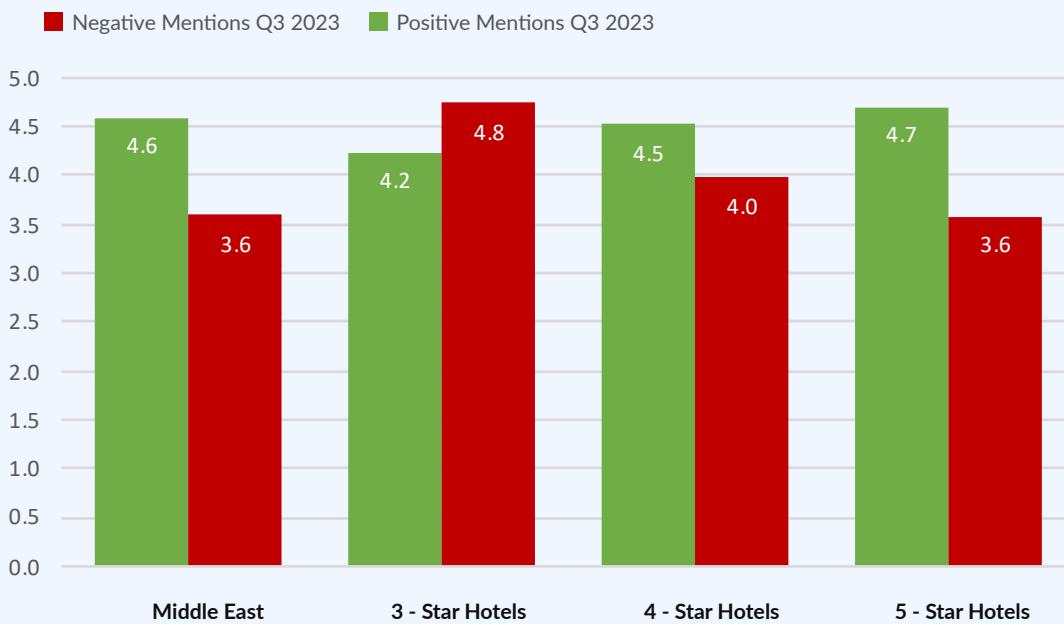
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Middle East: Management Responses

Middle East: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.



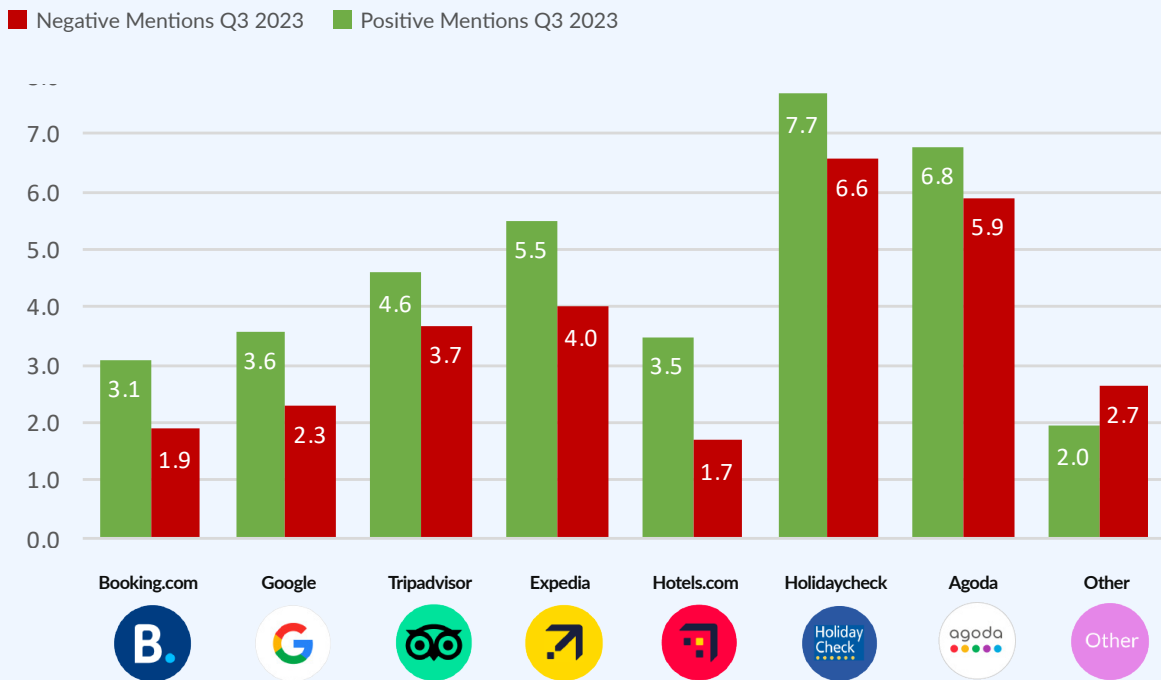
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Middle East: Management Responses

Middle East: Review Response Times per Review Source

The average number of days it took hotels to respond to positive and negative responsible online guest reviews in Q3 2023, per review source.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Middle East: City Benchmark

Here we have selected three cities in the Middle East region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

3-STAR HOTELS MIDDLE EAST

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
ABU DHABI	79.1%	1.8	74.5%	2.0
DOHA	82.5%	3.0	77.2%	11.7
DUBAI	79.0%	2.4	82.8%	2.4
RIYADH	72.7%	-0.2	64.4%	5.4

4-STAR HOTELS MIDDLE EAST

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
ABU DHABI	84.3%	0.8	77.2%	1.2
DOHA	81.6%	2.3	73.6%	-0.4
DUBAI	84.5%	2.1	81.2%	3.9
RIYADH	80.7%	2.1	71.5%	3.6

5-STAR HOTELS MIDDLE EAST

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
ABU DHABI	91.0%	1.0	82.8%	-1.0
DOHA	91.1%	2.2	86.4%	3.8
DUBAI	91.4%	1.0	85.0%	1.4
RIYADH	86.6%	1.6	84.4%	10.2

CHAPTER 9



Dubai / Doha – City Hotel Ranking

3-STAR HOTELS DUBAI

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Rove City Centre	0	96.2%	0.5	3655
2	Rove Healthcare City	0	96.1%	0.7	2720
3	Rove Downtown	0	95.9%	0.6	4307
4	Rove Dubai Marina	0	95.6%	0.4	2716
5	Rove Trade Centre	0	95.4%	0.6	2833
6	Rove City Walk	0	94.7%	0.5	5130
7	Rove La Mer Beach	5	94.7%	1.8	4420
8	Rove Expo 2020	0	94.7%	1.0	3108
9	Citadines Culture Village Dubai, Waterfront Jadaf	0	94.1%	0.6	1198
10	Studio M Arabian Plaza Hotel & Hotel Apartments.	-3	93.8%	0.1	3938
11	Holiday Inn Express Dubai Internet City, an IHG Hotel	4	93.1%	1.9	1895
12	Ibis Al Rigga	2	91.9%	0.7	3863
13	Arabian Park Hotel	-2	91.9%	-1.4	2076
14	Premier Inn Dubai Silicon Oasis	-1	91.8%	0.2	1708
15	Al Bustan Centre & Residence	2	91.7%	1.8	203
16	Novotel Suites Dubai Mall of the Emirates	4	91.3%	2.3	1937
17	Premier Inn Dubai Investment Park	-1	91.1%	0.1	1764
18	Al Khoory Executive Hotel, Al Wasl	0	90.7%	1.2	1136
19	Howard Johnson by Wyndham Bur Dubai	NEW	90.2%	---	806
20	J5 Hotels - Port Saeed	NEW	90.2%	---	630

3-STAR HOTELS DOHA

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Premier Inn Doha Airport	NEW	90.4%	NEW	2086
2	Palm Inn Hotel Doha	NEW	90.4%	NEW	1341
3	Premier Inn Doha Education City	NEW	88.9%	NEW	1922
4	Hampton By Hilton Doha Old Town	NEW	87.0%	NEW	1197
5	Musherib Hotel	NEW	84.8%	NEW	241
6	Akasiya Hotel	NEW	84.7%	NEW	940
7	Swiss-Belinn Doha	NEW	84.4%	NEW	842
8	Al Aseel Hotel	NEW	83.5%	NEW	456
9	Kingsgate Hotel Doha	NEW	83.2%	NEW	697
10	The Castle Premium Hotel	NEW	82.6%	NEW	665
11	Asherij Hotel	NEW	81.7%	NEW	406
12	Majestic Hotel	NEW	79.4%	NEW	389
13	Golden Ocean Hotel	NEW	78.1%	NEW	1579
14	Chairmen Hotel	NEW	76.8%	NEW	172
15	Al Muntazah Plaza Hotel	NEW	76.4%	NEW	154
16	The Town Hotel Doha	NEW	76.1%	NEW	838
17	Cayam Hotel Formerly Grand Qatar Palace Hotel	NEW	73.7%	NEW	139
18	Doha Dynasty Hotel	NEW	71.8%	NEW	1047
19	---	---	---	---	---
20	---	---	---	---	---

CHAPTER 9



4-STAR HOTELS DUBAI

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Vida Emirates Hills	2	98.1%	1.5	652
2	Vida Dubai Marina Yacht Club	-1	98.0%	0.9	3152
3	Adagio Premium Dubai Al Barsha	-1	97.9%	0.9	383
4	Element Al Jaddaf, Dubai	NEW	95.8%	---	294
5	First Central Hotel Suites	2	95.4%	1.9	3114
6	Residence Inn By Marriott Sheikh Zayed Road	0	94.9%	0.9	1118
7	Vida Creek Harbour	2	94.8%	1.7	1392
8	Holiday Inn Dubai Festival City	-3	94.7%	0.6	4557
9	Voco Dubai The Palm	-5	94.7%	-0.6	992
10	Mercure Hotel Apartments Dubai Barsha Heights	NEW	94.4%	---	3352
11	Park Inn by Radisson Dubai Motor City	4	94.2%	1.8	813
12	Courtyard By Marriott Al Barsha, Dubai	1	94.1%	1.4	1509
13	Courtyard by Marriott World Trade Centre, Dubai	NEW	93.9%	---	1735
14	Vida Downtown	-3	93.6%	0.6	1384
15	Grand Heights Hotel Apartments	NEW	93.5%	---	495
16	Copthorne Hotel Dubai	-8	93.4%	0.1	2014
17	DoubleTree by Hilton Dubai Business Bay	0	93.3%	1.1	1276
18	Citadines Metro Central Dubai	0	93.3%	1.4	782
19	Delta Hotels Jumeirah Beach, Dubai	NEW	93.3%	---	460
20	Ramada by Wyndham Downtown Dubai	-8	93.2%	0.4	3196

4-STAR HOTELS DOHA

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Embassy Suites By Hilton Doha Old Town	NEW	93.2%	NEW	582
2	Radisson Blu Hotel, Doha	NEW	92.1%	NEW	3454
3	Holiday Inn Doha - The Business Park	NEW	91.4%	NEW	603
4	Movenpick Hotel Doha	NEW	89.8%	NEW	861
5	Oryx Airport Hotel	NEW	89.6%	NEW	1517
6	C - Hotel and Suites Doha	NEW	89.2%	NEW	589
7	La Maison Hotel Doha	NEW	89.1%	NEW	1390
8	Adagio Doha	NEW	88.2%	NEW	1265
9	Wonder Palace Hotel Qatar	NEW	88.0%	NEW	1162
10	Plaza Inn Doha	NEW	87.8%	NEW	3433
11	Four Points by Sheraton Doha	NEW	87.2%	NEW	131
12	Sedra Arjaan by Rotana	NEW	86.9%	NEW	555
13	Sapphire Plaza Hotel	NEW	86.6%	NEW	1316
14	Centro Capital Doha	NEW	86.6%	NEW	355
15	Ramada By Wyndham Doha Old Town	NEW	86.4%	NEW	2689
16	Somerset Al Mansoura Doha	NEW	86.1%	NEW	289
17	Holiday Villa Hotel And Residence City Centre Doha	NEW	85.8%	NEW	1333
18	Best Western Plus Doha	NEW	85.7%	NEW	387
19	The Curve Hotel	NEW	85.6%	NEW	155
20	Century Hotel Doha	NEW	84.2%	NEW	584

CHAPTER 9



5-STAR HOTELS DUBAI

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Rixos The Palm Dubai	0	98.2%	0.4	2800
2	Softel Dubai The Obelisk	0	97.9%	0.7	4399
3	Al Jaddaf Rotana Suite Hotel	1	97.3%	1.0	3719
4	Softel Dubai Jumeirah Beach	4	96.8%	0.7	5412
5	Address Grand Creek Harbour	NEW	96.7%	---	801
6	Conrad Dubai	-1	96.5%	0.3	2772
7	Waldorf Astoria Dubai International Financial Centre	0	96.4%	0.2	652
8	Address Dubai Marina	-2	96.2%	0.0	1966
9	Waldorf Astoria Dubai Palm Jumeirah	1	96.1%	0.3	2400
10	Cheval Maison - The Palm Dubai	-7	96.1%	-0.8	428
11	Pullman Dubai Jumeirah Lakes Towers	NEW	96.0%	---	1211
12	Hilton Dubai Palm Jumeirah	NEW	95.9%	---	4036
13	Address Boulevard	-2	95.9%	0.1	1717
14	Kempinski Hotel Mall Of The Emirates	4	95.8%	0.8	3028
15	Palace Downtown	NEW	95.8%	---	1461
16	FIVE Palm Jumeirah Dubai	NEW	95.6%	---	9637
17	Golden Sands Hotel Creek	NEW	95.6%	---	1404
18	The Ritz-Carlton, Dubai	-5	95.6%	0.0	1036
19	InterContinental Dubai Marina	0	95.5%	0.5	2097
20	Le Royal Meridien Beach Resort & Spa Dubai	0	95.5%	0.5	971

5-STAR HOTELS DOHA

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Aleph Doha Residences, Curio Collection by Hilton	NEW	98.0%	NEW	2884
2	InterContinental Doha Beach & Spa	NEW	97.5%	NEW	3544
3	Banana Island Resort Doha by Anantara	NEW	97.1%	NEW	2213
4	Kempinski Residences & Suites Doha	NEW	96.7%	NEW	242
5	Fraser Suites Doha	NEW	96.5%	NEW	1348
6	The Chedi Katara Hotel & Resort	NEW	96.2%	NEW	827
7	Marsa Malaz Kempinski, The Pearl - Doha	NEW	95.5%	NEW	1273
8	Mandarin Oriental Doha	NEW	95.5%	NEW	406
9	Sharq Village & Spa, a Ritz-Carlton Hotel	NEW	95.2%	NEW	628
10	Park Hyatt Doha	NEW	95.2%	NEW	342
11	Sheraton Grand Doha Resort & Convention Hotel	NEW	95.1%	NEW	1084
12	Rixos Gulf Hotel Doha	NEW	95.1%	NEW	814
13	Ezdan Palace Hotel	NEW	94.9%	NEW	996
14	Alwadi Hotel Doha MGallery	NEW	94.8%	NEW	993
15	The Ritz-Carlton, Doha	NEW	94.8%	NEW	626
16	Velero Hotel	NEW	94.7%	NEW	1350
17	The St. Regis Doha	NEW	94.7%	NEW	1045
18	Hilton Doha	NEW	94.3%	NEW	2840
19	Crowne Plaza Doha West Bay	NEW	94.2%	NEW	488
20	The St. Regis Marsa Arabia Island, The Pearl Qatar	NEW	94.2%	NEW	474



Guest
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Africa

CHAPTER

10



Africa: Market Overview

As of July year-to-date, Africa had recovered 92% of international tourism arrivals relative to pre-Covid 2019, well ahead of the global recovery pace of 84%, according to the UNWTO. Performance varied significantly by region, however. By subregion, North Africa exceeded pre-pandemic levels by 7.6 points, whereas Sub-Saharan Africa fell short by 20.5 points. By country, Ethiopia (+28%), Tanzania (+19%), and Morocco (+15%) far exceeded pre-pandemic visitor levels.¹¹

- Africa has almost fully recovered to pre-pandemic international tourism volume
- The Global Review Index was **84.8%**
- Review volume grew by **11.1%**
- Google generated **42.6%** of reviews, well outpacing Booking.com
- Hotels responded to **70.8%** of reviews

In the third quarter of 2023, hotels in Africa achieved a Global Review Index of 84.8%, an increase of 1.0 points over Q3 2022 but 0.6 points below the global average. Four-star hotels showed the largest improvement, increasing the GRI by 1.2 points.

Review volume in the region grew by 11.1%. Google's volume surged by 24.0%, representing 42.6% of market share. Booking.com lost 5.8 points in market share, generating 32.9% of total reviews. Tripadvisor accounted for 13.6% of review share. HolidayCheck came in at a distant fourth, accounting for 4.4% in review share.

Hotels in Africa responded to 70.8% of reviews, 8.3 points higher than the global average and 3.7 points above Q3 2022. Positive reviews received a much higher response rate than negative reviews, at 75.2% and 45.6% respectively. On average, it took 3.5 days to respond to positive reviews and 5.3 days to respond to negative reviews.

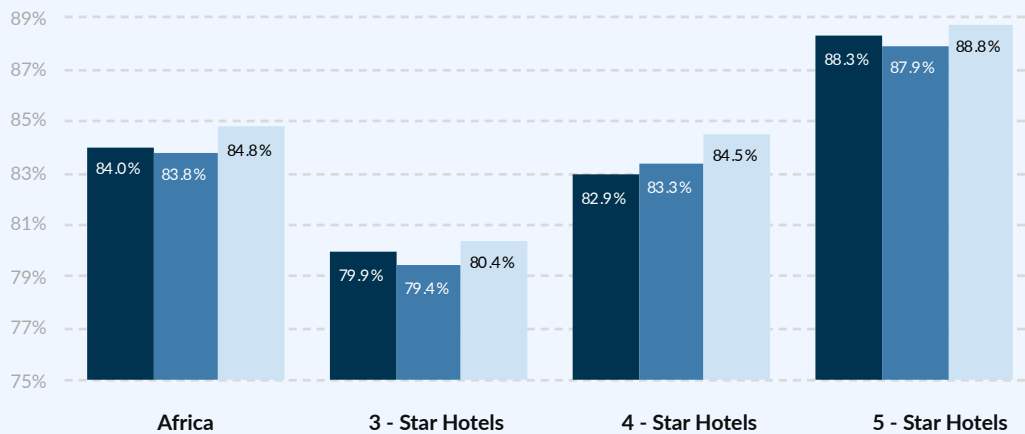
¹¹ UNWTO. [World Tourism Barometer](#). September 2023..

Africa: GRI Metrics

Africa: Global Review Index™ (GRI)

A three year comparison of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 (OTAs) and review sites in over 45 languages.

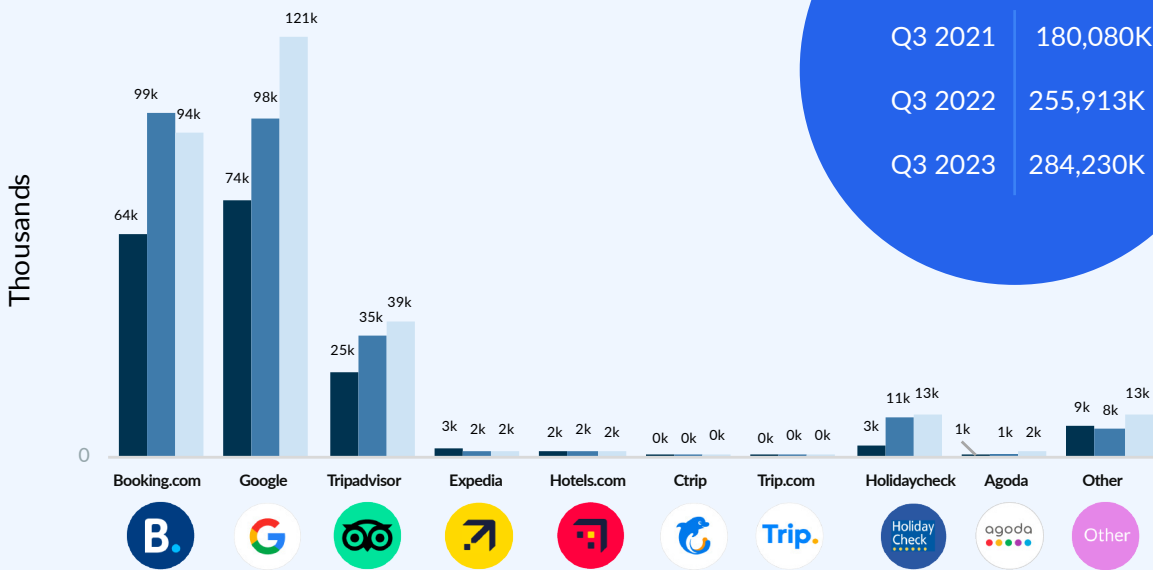


Africa: Review Volume

Africa: Review Volume per Source

A three-year comparison of online guest review volume, per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



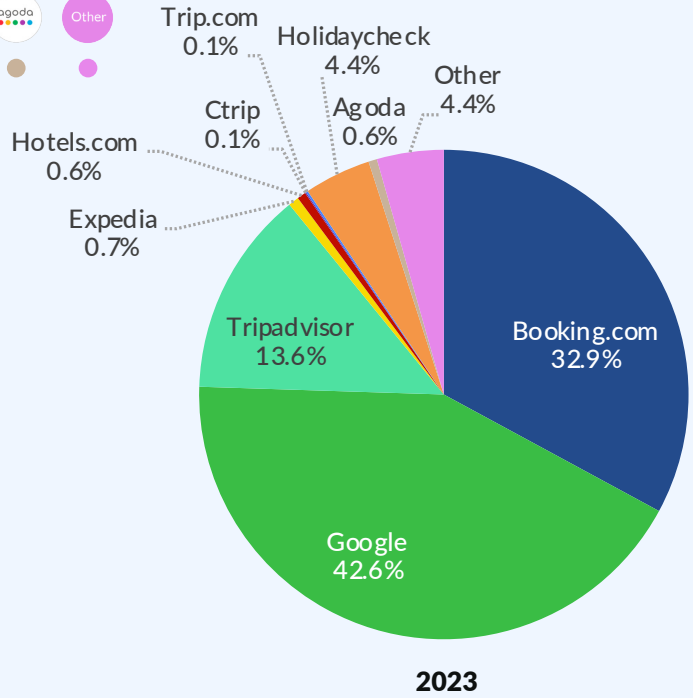
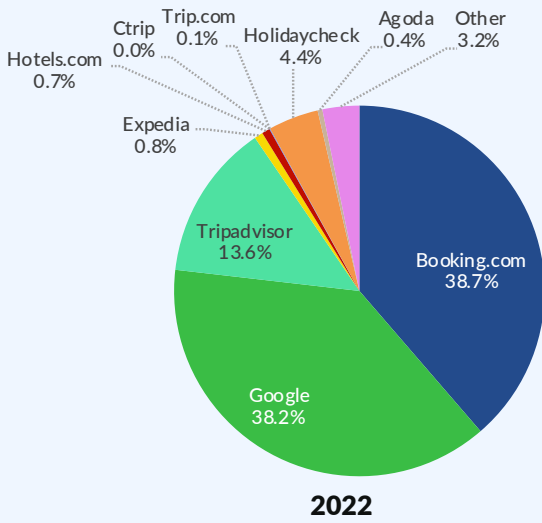
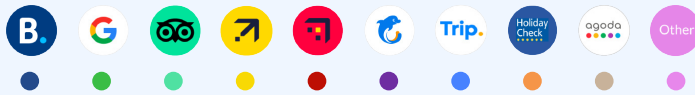
The Review volume collects reviews from 55 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.



Africa: Share of Reviews Per Source

Africa: Review Volume per Source

A YOY comparison of guest review market share per review source.



The review site/OTA market share percentage and changes are derived from a 9,500-hotel data set representing the six major global regions.

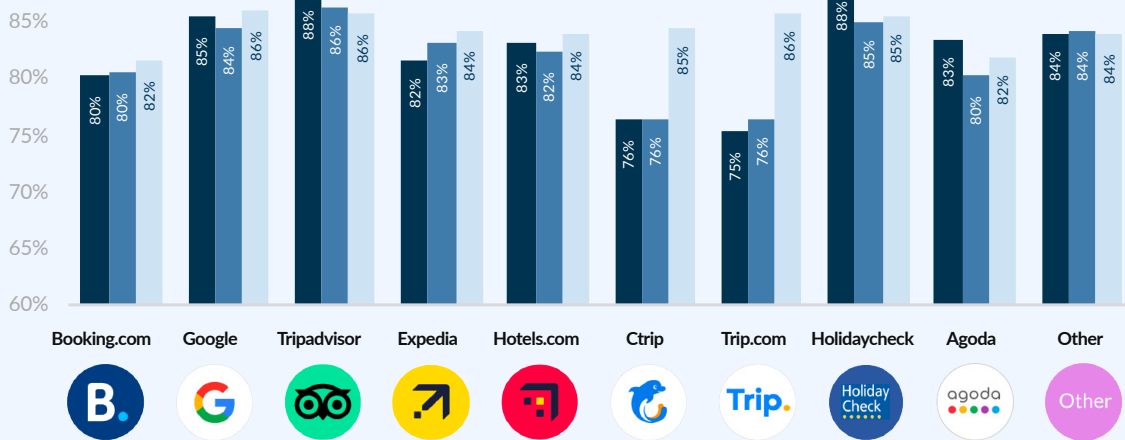


Africa: Review Source Indexes

Africa: Review Source Indexes

A three-year comparison of guest review indexes per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



The review source scores are derived from Shiji ReviewPro's proprietary algorithm, from a 9,500-hotel data set representing the six major global regions.



Africa: Top 5 Categories Affecting GRI

Africa: Top Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.9	ROOM	-1.7
STAFF	0.7	FOOD & DRINKS	-1.7
ESTABLISHMENT	0.7	CLEANLINESS	-1.4
ENTERTAINMENT	0.5	ESTABLISHMENT	-1.4
FOOD & DRINKS	0.4	FACILITIES	-1.1

Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE

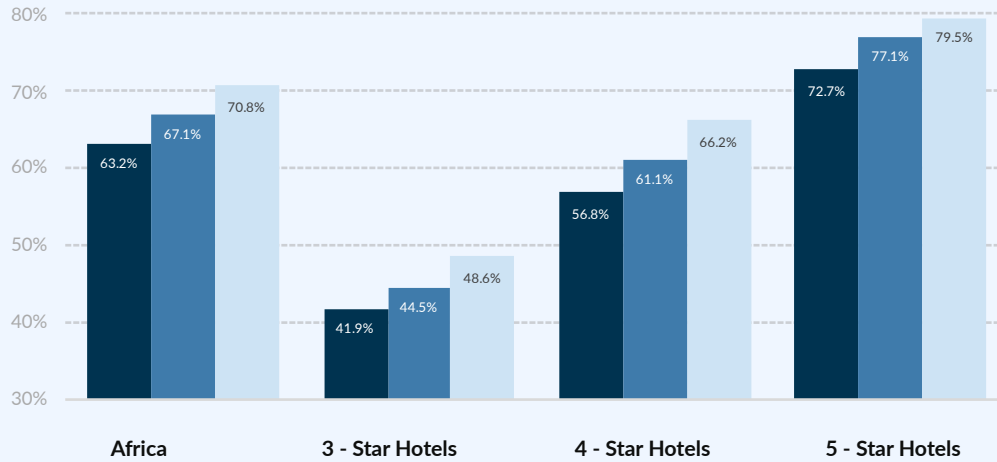


Africa: Management Responses

Africa: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Africa: Management Responses

Africa: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



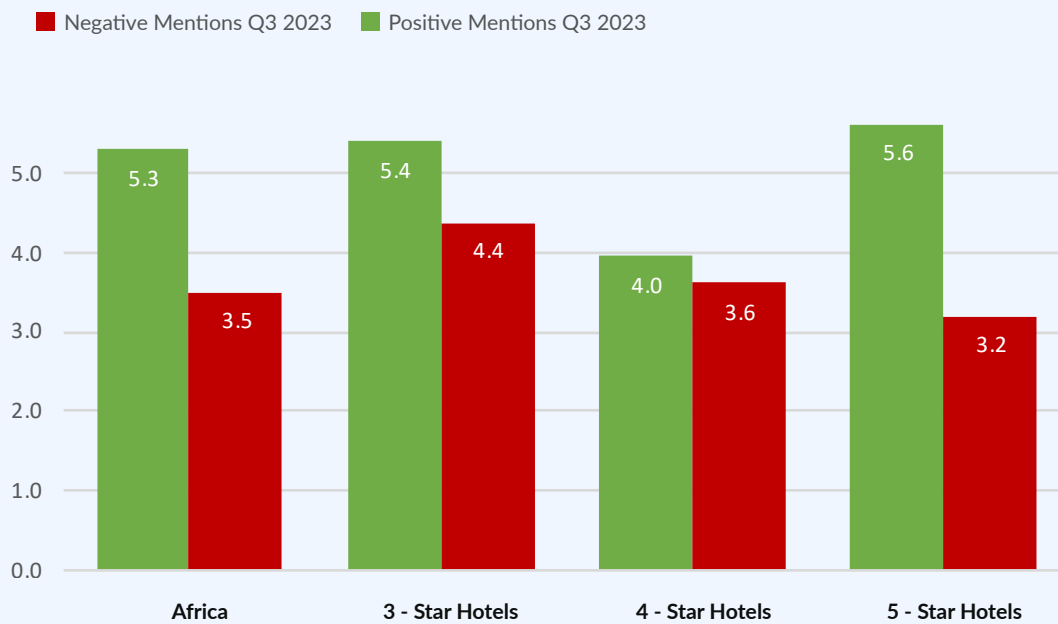
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Africa: Management Responses

Africa: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.



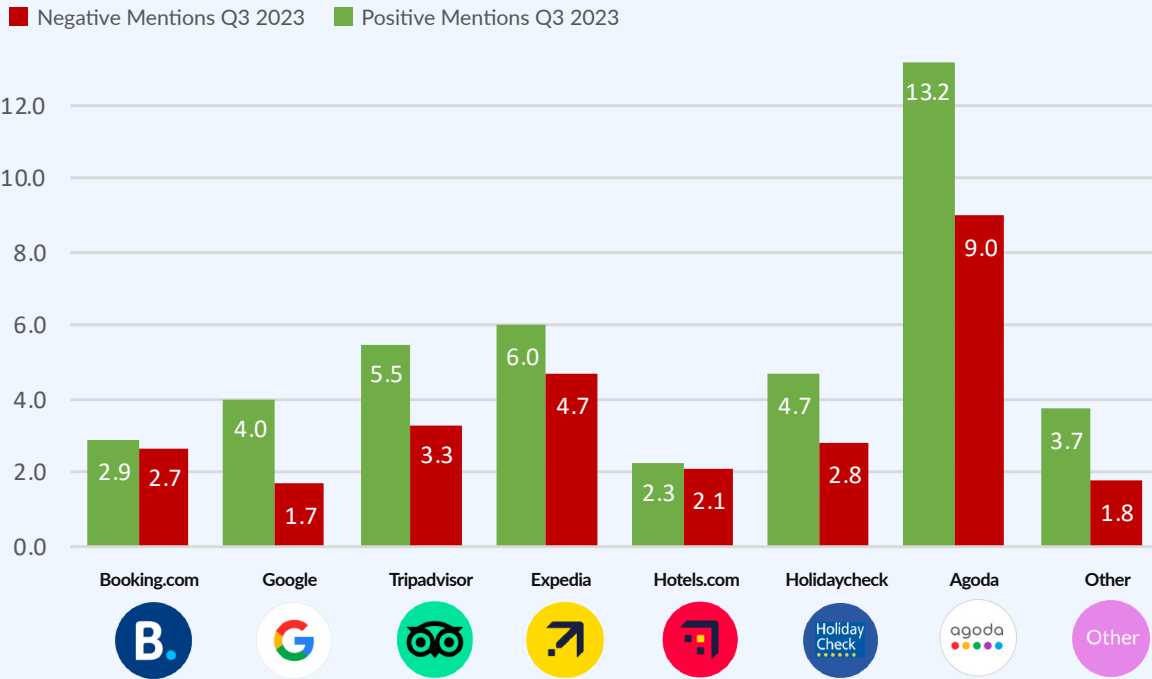
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Shiji | REVIEWPRO

Africa: Management Responses

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The average number of days it took hotels to respond to positive and negative responsible online guest reviews in Q3 2023, per review source.



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



Africa: City Benchmark

Here we have selected four cities in the Africa region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

3-STAR HOTELS AFRICA

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
CAIRO	73.9%	1.7	69.1%	7.1
CAPE TOWN	82.7%	-0.4	67.9%	-2.1
CASABLANCA	76.6%	3.4	68.9%	4.6
JOHANNESBURG	82.6%	1.4	66.4%	1.2
MARRAKECH	83.5%	1.5	66.9%	-2.5

4-STAR HOTELS AFRICA

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
CAIRO	79.5%	3.1	73.1%	5.5
CAPE TOWN	87.0%	-1.0	73.6%	0.2
CASABLANCA	76.6%	0.9	66.8%	4.6
JOHANNESBURG	85.6%	-0.1	71.4%	1.1
MARRAKECH	84.0%	1.6	72.1%	3.1

5-STAR HOTELS AFRICA

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
CAIRO	89.4%	2.9	78.4%	4.7
CAPE TOWN	92.1%	-0.1	81.5%	2.1
CASABLANCA	84.3%	2.2	79.4%	11.8
JOHANNESBURG	90.8%	0.0	78.4%	2.0
MARRAKECH	88.9%	0.6	76.0%	1.3

Cape Town / Cairo – City Hotel Ranking

3-STAR HOTELS CAPE TOWN

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Sweet Orange Guest House	1	94.4%	1.1	119
2	Radisson RED Hotel V&A Waterfront Cape Town	3	89.0%	2.3	647
3	The Charles Guest House	3	88.5%	2.2	125
4	City Lodge Hotel Victoria And Alfred Waterfront	6	84.8%	0.9	191
5	Balmoral Lodge	3	84.1%	-0.7	127
6	Holiday Inn Express Cape Town City Centre, an IHG Hotel	11	84.0%	2.2	562
7	ONOMO Hotel Cape Town – Inn On The Square	5	84.0%	1.0	276
8	Protea Hotel by Marriott Cape Town Mowbray	1	84.0%	-0.4	164
9	SunSquare Cape Town Gardens	4	84.0%	1.4	124
10	Best Western Cape Suites Hotel	NEW	83.6%	---	223
11	ANEW Hotel Green Point Cape Town	3	82.7%	0.2	180
12	Mouille Point Village	NEW	79.7%	---	144
13	Innscape Classic Formely The New Tulbagh Hotel	NEW	79.6%	---	279
14	Garden Court Nelson Mandela Boulevard	NEW	78.6%	---	180
15	Cape Diamond Boutique Hotel	NEW	77.4%	---	178
16	The Amalfi Boutique Hotel	NEW	77.0%	---	680
17	Ocean Breeze Hotel	NEW	77.0%	---	231
18	La Splendida Hotel by NEWMARK	NEW	76.4%	---	152
19	Protea Hotel by Marriott Cape Town Durbanville	0	76.0%	-4.9	155
20	Cape Town Beachfront Apartments at Leisure Bay	NEW	75.0%	---	122

3-STAR HOTELS CAIRO

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Pyramids Sunrise Inn	NEW	91.1%	NEW	214
2	Royal Inn Residence	NEW	91.0%	NEW	227
3	President Hotel	NEW	87.2%	NEW	5475
4	Carlton Hotel	NEW	86.9%	NEW	270
5	Royal Inn Residence New Cairo	NEW	85.3%	NEW	138
6	King Hotel Cairo	NEW	85.0%	NEW	177
7	Nile Villa Hotel	NEW	84.6%	NEW	385
8	New President Hotel Zamalek	NEW	83.7%	NEW	214
9	Comfort Sphinx Inn	NEW	83.0%	NEW	488
10	Giza Inn	NEW	81.7%	NEW	310
11	Cleopatra Hotel	NEW	80.6%	NEW	1604
12	Amin Hotel	NEW	79.1%	NEW	295
13	Gawharet Al Ahram Hotel	NEW	79.0%	NEW	409
14	Horus House Hotel	NEW	78.0%	NEW	103
15	Zayed Hotel	NEW	77.6%	NEW	374
16	Happy City Hotel	NEW	77.3%	NEW	130
17	Maadi Hotel	NEW	76.0%	NEW	109
18	Cosmopolitan Hotel	NEW	74.6%	NEW	493
19	Golden Park Hotel Cairo, Heliopolis	NEW	73.6%	NEW	418
20	Beirut Hotel	NEW	72.2%	NEW	103

CHAPTER 10



4-STAR HOTELS CAPE TOWN

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Vineyard Hotel	10	92.7%	0.6	389
2	Ocean View House	8	92.5%	0.1	203
3	Cape Heritage Hotel	6	92.2%	-0.3	189
4	Romney Park Luxury Apartments	8	91.3%	-0.3	256
5	Hotel Verde Cape Town Airport	14	91.1%	1.0	1299
6	Southern Sun The Cullinan	NEW	90.2%	---	275
7	O' Two Hotel	8	89.9%	-1.0	236
8	Cloud 9 Boutique Hotel and Spa	NEW	89.2%	---	103
9	Victoria & Alfred Hotel by NEWMARK	NEW	89.1%	---	538
10	AC Hotel By Marriott Cape Town Waterfront	NEW	89.1%	---	429
11	Krystal Beach Hotel	NEW	88.8%	---	473
12	The Winchester Hotel by NEWMARK	NEW	88.8%	---	370
13	Grand Daddy Boutique Hotel by BON Hotels	NEW	88.7%	---	261
14	The Bay Hotel	NEW	88.5%	---	248
15	The Villa Rosa	NEW	88.5%	---	145
16	Southern Sun Newlands	NEW	88.5%	---	114
17	Old Bank Hotel	NEW	88.2%	---	344
18	Protea Hotel Fire & Ice by Marriott Cape Town	NEW	87.9%	---	223
19	The Cape Milner	NEW	87.8%	---	231
20	Newkings Boutique Hotel	NEW	87.7%	---	151

4-STAR HOTELS CAIRO

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Steigenberger Hotel El Tahrir	NEW	95.6%	NEW	6128
2	Triumph Plaza Hotel	NEW	90.8%	NEW	877
3	Villa Belle Epoque	NEW	90.4%	NEW	367
4	Hilton Cairo Zamalek Residences	NEW	89.7%	NEW	1180
5	Novotel Cairo 6th Of October	NEW	89.0%	NEW	625
6	Radisson Blu Hotel, Cairo Heliopolis	NEW	88.6%	NEW	3104
7	Novotel Cairo El Borg	NEW	88.3%	NEW	1307
8	Barceló Cairo Pyramids	NEW	87.0%	NEW	801
9	Novotel Cairo Airport	NEW	86.9%	NEW	2996
10	Staybridge Suites Cairo - Citystars, an IHG Hotel	NEW	86.8%	NEW	141
11	The Oasis Hotel Pyramids	NEW	84.9%	NEW	263
12	Golden Inn Hotel	NEW	83.8%	NEW	240
13	Helnan Landmark Hotel	NEW	82.4%	NEW	481
14	Baron Hotel Cairo	NEW	81.4%	NEW	676
15	Regency Pyramids View	NEW	80.6%	NEW	433
16	Golden Tulip Flamenco	NEW	80.1%	NEW	865
17	Pyramids Park Resort Cairo	NEW	79.6%	NEW	737
18	Om Kolthoom Hotel / Tower	NEW	75.0%	NEW	468
19	Amarante Pyramids Hotel	NEW	74.4%	NEW	844
20	Cairo World Trade Center Hotel & Residences	NEW	73.9%	NEW	535

CHAPTER 10



5-STAR HOTELS CAPE TOWN

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Mount Nelson, A Belmond Hotel, Cape Town	1	97.5%	0.3	242
2	POD Camps Bay	-1	96.8%	-0.6	141
3	One&Only Cape Town	8	96.6%	4.2	284
4	Tintswalo Atlantic	-1	96.0%	0.7	101
5	Zest Boutique Hotel by The Living Journey Collection	4	95.6%	2.7	129
6	Villa Coloniale Schumacher Luxury Retreat	-1	95.5%	0.5	156
7	The Tree House Boutique Hotel by The Living Journey Collection	5	94.2%	1.9	112
8	The Cellars-Hohenort	2	93.7%	1.1	209
9	Radisson Blu Hotel Waterfront, Cape Town	8	92.9%	1.8	581
10	South Beach Camps Bay Boutique Hotel	6	92.1%	0.9	125
11	Taj Cape Town	9	91.4%	0.8	893
12	The Westin Cape Town	7	91.3%	0.6	461
13	Gorgeous George by Design Hotels™	NEW	91.2%	---	185
14	DysArt Boutique Hotel	-1	91.1%	-0.8	125
15	The Capital 15 on Orange Hotel & Spa	NEW	90.6%	---	381
16	Hyatt Regency Cape Town	NEW	90.4%	---	564
17	The Capital Mirage Hotel	NEW	90.4%	---	164
18	The Twelve Apostles Hotel and Spa	NEW	90.2%	---	242
19	Pepperclub Hotel	NEW	87.8%	---	542
20	The Table Bay Hotel	NEW	87.0%	---	526

5-STAR HOTELS CAIRO

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	InterContinental Cairo Semiramis, an IHG Hotel	NEW	97.1%	---	9351
2	Royal Maxim Palace Kempinski Cairo	NEW	96.1%	---	1878
3	Kempinski Nile Hotel Cairo	NEW	94.9%	---	2009
4	The St. Regis Cairo	NEW	94.7%	---	1603
5	Four Seasons Hotel Cairo at Nile Plaza	NEW	94.2%	---	1452
6	Holiday Inn Citystars, an IHG Hotel	NEW	93.7%	---	2954
7	Dusit Thani LakeView Cairo	NEW	93.5%	---	1631
8	Hyatt Regency Cairo West	NEW	93.4%	---	691
9	Intercontinental Cairo Citystars, an IHG Hotel	NEW	93.2%	---	2284
10	Marriott Mena House, Cairo	NEW	93.2%	---	1811
11	The Westin Cairo Golf Resort & Spa, Katameya Dunes	NEW	93.0%	---	633
12	The Nile Ritz-Carlton, Cairo	NEW	92.9%	---	1028
13	Sofitel Cairo Nile El Gezirah	NEW	92.6%	---	3842
14	Fairmont Nile City	NEW	92.0%	---	3465
15	Four Seasons Hotel Cairo at the First Residence	NEW	91.7%	---	1197
16	The St. Regis Almasa Hotel, Cairo	NEW	91.3%	---	453
17	Renaissance Cairo Mirage City Hotel	NEW	90.9%	---	951
18	Conrad Cairo Hotel & Casino	NEW	90.7%	---	1475
19	Le Meridien Cairo Airport	NEW	90.5%	---	2029
20	Movenpick Hotel & Casino Cairo-Media City	NEW	90.4%	---	1125



Guest
Experience
Benchmark

North America

CHAPTER

11



CHAPTER 11



North America: Market Overview

In summer of 2023, occupancy in the U.S. decreased slightly from the previous summer, whereas ADR and RevPAR grew by between 0.5 and 3%, according to STR.¹² Inflation outpaced ADR growth, meaning real ADR declined. In September, room demand was anticipated to be the second highest ever recorded in the month, slightly down from the previous September.¹³

- Growth in demand in North America slowed considerably
- The Global Review Index was **83.9%**, the second lowest of the six regions
- Review volume grew by **7.3%**
- Booking.com lost **7.2 points** in review share, generating **35.6%** of reviews
- Hotels responded to **56.8%** of reviews

In Canada, hotels increased ADR by 8.1% and RevPAR by 9.7% in September 2023 compared to the previous September.

An increase in Americans travelling overseas this summer was partially offset by a surge in inbound international travel volume, which in August reached its highest level since the pandemic. International traveller spending, however, was still below 2019.¹⁵

The Global Review Index for hotels in North America was 83.9% in the third quarter of 2023, an increase of 1.3 points over Q3 2022. However, it was the second lowest of the six regions and 1.5 points below the global average.

Review volume grew by 7.3% in the quarter. Booking.com lost 7.2 points in market share, generating 35.6% of reviews. Expedia captured much of the loss, growing review share by 9.1 points. With 21.5% of reviews, Expedia generated a much higher market share than in other regions. Google occupied 22.8% and Tripadvisor 8.7%, followed by Hotels.com at 7.2%.

Hotels in North America responded to 56.8% of reviews, an increase of 6.8 points relative to Q3 2022 but 5.7 points below the global average. On average, it took 3.3 days to respond to positive reviews and 4.1 days to respond to negative reviews.

¹² STR. [U.S. hotel performance for September 2023](#). October 2023.

¹³ STR. [STR Weekly Insights: 24-30 September 2023](#). October 2023.

¹⁴ STR. [Canada hotel performance remained on upward trajectory in September](#). October 2023.

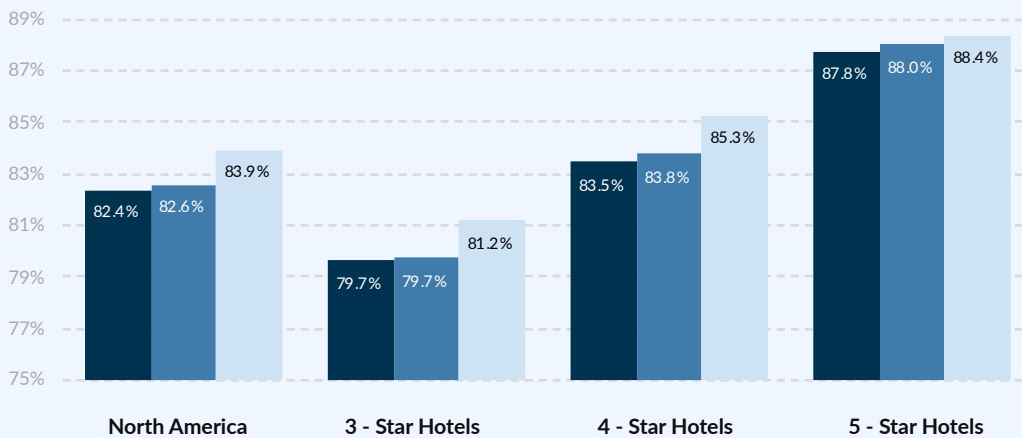
¹⁵ Skift. [International Traveler Spending Reached \\$19 Billion in August](#). October 2023.

North America: GRI Metrics

North America: Global Review Index™ (GRI)

A three year comparison of the Global Review Index™ (GRI) by star rating.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



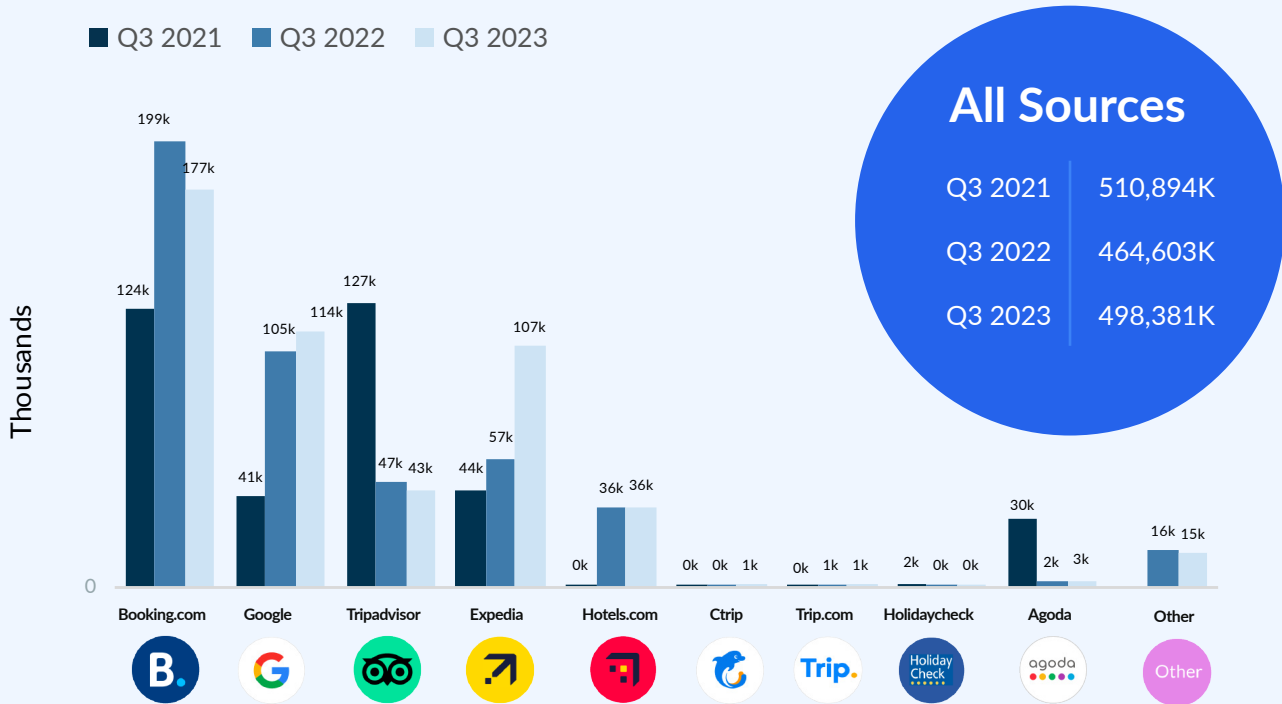
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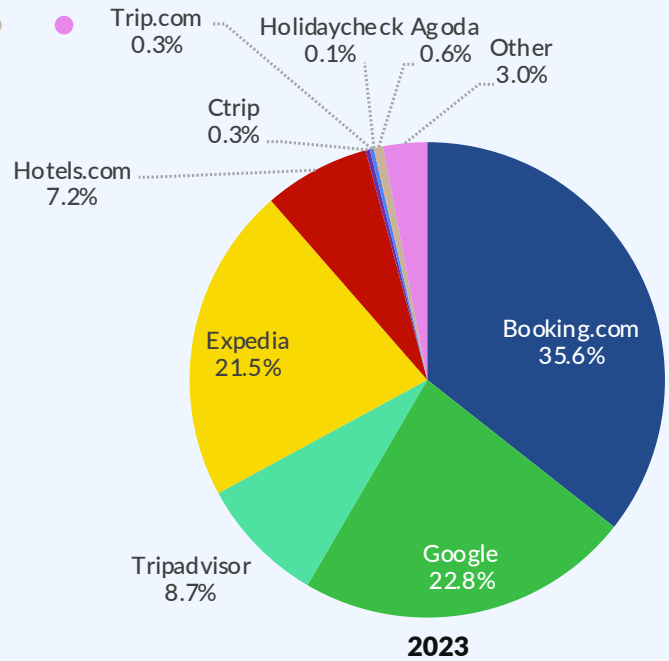
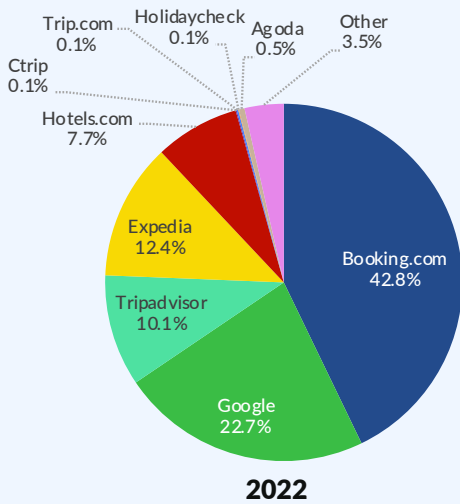
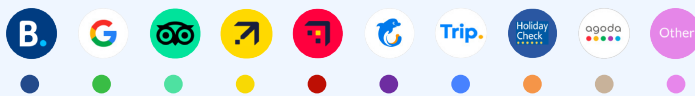
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North America: Share of Reviews Per Source

North America: Review Volume per Source

A YOY comparison of guest review market share per review source.



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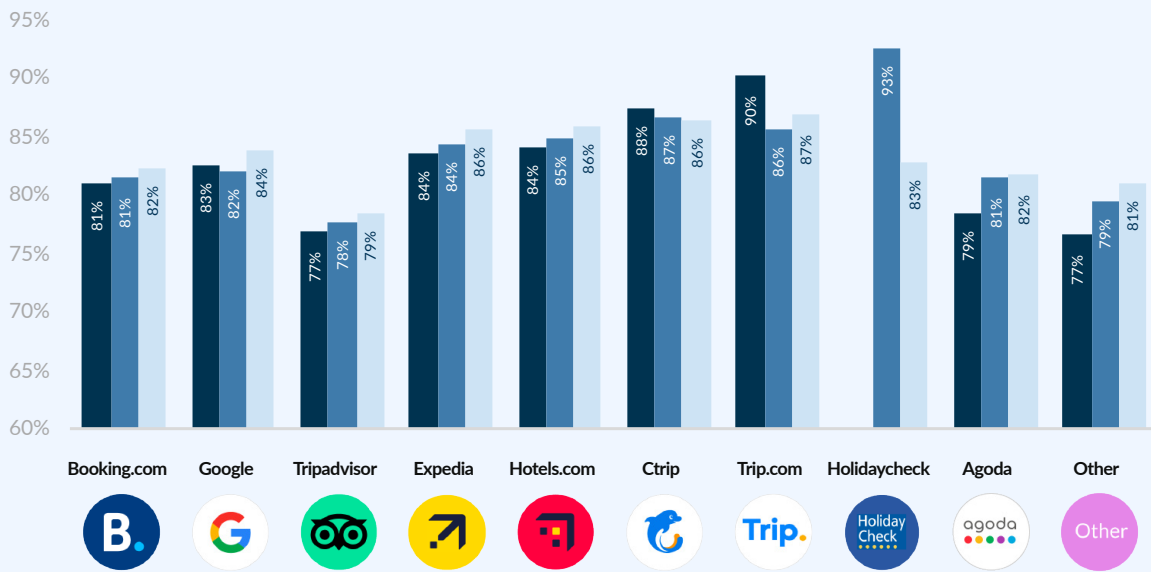


North America: Review Source Indexes

North America: Review Source Indexes

A three-year comparison of guest review indexes per review source.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



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North America: Top 5 Categories Affecting GRI

North America: Top Semantic Categories Affecting Guest Experience

The top five categories that have most positive and negative impact on online reputation score as measured by the Global Review Index, for Q3 2023.

CATEGORY		POSITIVE	CATEGORY		NEGATIVE
EXPERIENCE		1.0	ROOM		-3.7
STAFF		0.7	CLEANLINESS		-2.6
FOOD & DRINKS		0.4	ESTABLISHMENT		-2.0
CLEANLINESS		0.4	VALUE		-2.0
SERVICE		0.3	EXPERIENCE		-1.8

Top Concepts derive from a proprietary algorithm that also includes frequency to show whom from the GRI™ index is most frequently positively or negatively impacted.

SOURCE

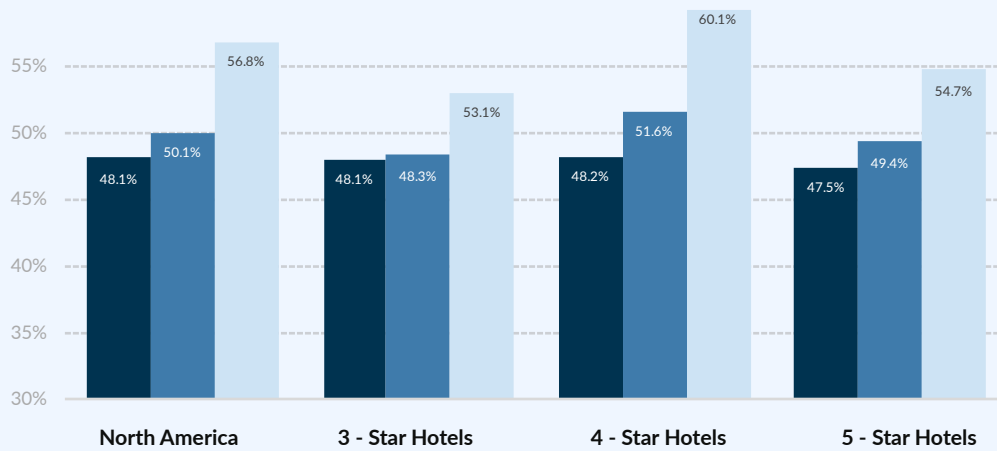


North America: Management Responses

North America: Review Response by Star Rating

The percentage of responsible online reviews that 3-, 4-, and 5-star hotels reply to, a three-year comparison.

■ Q3 2021 ■ Q3 2022 ■ Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



North America: Management Responses

North America: Percentage of Positive and Negative Review Response, per Source.

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q3 2023, by review source.

Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



North America: Management Responses

North America: Review Response Times per Star Rating

The average number of days it took 3-, 4-, and 5-star hotels to respond to positive and negative responsible online guest reviews in Q3 2023.

■ Negative Mentions Q3 2023 ■ Positive Mentions Q3 2023



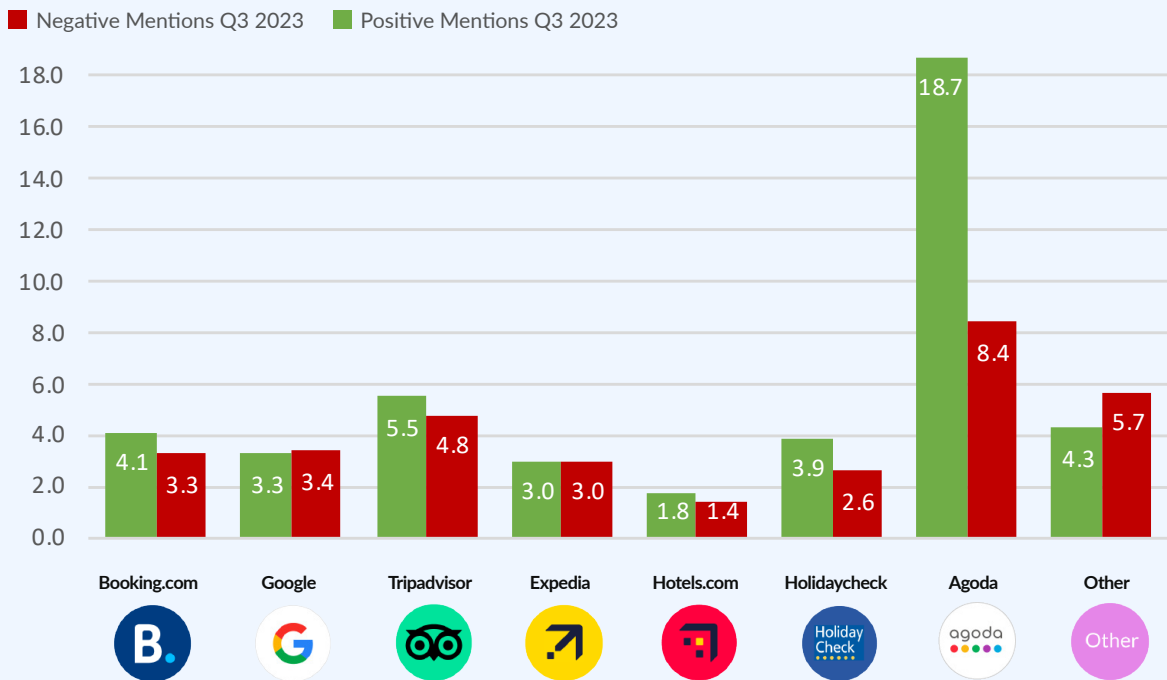
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Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.



CHAPTER 11



North America: City Benchmark

Here we have selected 12 cities in the North America region and displayed the Global Review Index score for the 3-, 4-, and 5-star hotels and serviced apartments in the city. The cities are displayed in alphabetical order, for more information see the methodology.

3-STAR HOTELS NORTH AMERICA

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
AUSTIN	80.2%	2.2	61.9%	5.7
CHICAGO	81.9%	1.3	66.9%	2.3
HONOLULU	80.5%	0.4	66.4%	0.7
LAS VEGAS	81.6%	0.3	54.8%	1.6
LOS ANGELES	78.6%	2.0	61.8%	1.9
MIAMI	78.2%	2.8	62.7%	1.7
MONTREAL	79.3%	2.5	63.4%	3.1
NEW YORK	77.1%	1.1	64.0%	3.2
SAN FRANCISCO	81.8%	0.1	70.2%	2.5
TORONTO	78.5%	2.5	60.8%	2.1
VANCOUVER	80.7%	2.4	65.8%	2.7
WASHINGTON D.C.	81.2%	0.6	65.6%	2.0

4-STAR HOTELS NORTH AMERICA

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
AUSTIN	86.7%	2.4	73.2%	2.1
CHICAGO	84.9%	2.3	68.1%	3.4
HONOLULU	85.9%	1.5	70.0%	1.2
LAS VEGAS	80.7%	0.5	56.6%	-0.3
LOS ANGELES	82.6%	1.2	63.9%	1.8
MIAMI	83.6%	1.9	68.1%	2.1
MONTREAL	85.5%	1.5	70.7%	3.1
NEW YORK	82.5%	2.1	66.0%	3.4
SAN FRANCISCO	85.5%	1.2	71.5%	2.0
TORONTO	85.2%	1.8	67.1%	3.6
VANCOUVER	87.0%	1.7	75.7%	3.2
WASHINGTON D.C.	85.1%	1.2	70.3%	1.6

5-STAR HOTELS NORTH AMERICA

City	Q2+Q3 2023 GRI	Change (Q2+Q3 2022)	Positive Mentions %	Change
AUSTIN	91.5%	2.4	83.2%	12.8
CHICAGO	91.0%	1.8	82.1%	2.6
HONOLULU	89.0%	0.8	67.9%	-1.1
LAS VEGAS	86.9%	-0.8	66.6%	-2.0
LOS ANGELES	86.4%	2.5	76.8%	0.7
MIAMI	86.8%	1.3	73.6%	0.7
MONTREAL	90.8%	2.8	73.3%	6.3
NEW YORK	87.1%	1.1	73.5%	1.1
SAN FRANCISCO	90.3%	1.0	76.3%	5.2
TORONTO	91.2%	1.9	78.7%	2.2
VANCOUVER	89.2%	1.8	73.4%	3.4
WASHINGTON D.C.	88.1%	0.5	73.7%	0.2

CHAPTER 11



New York / LA – City Hotel Ranking

3-STAR HOTELS NEW YORK

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Best Western Plus Soho Hotel	7	88.3%	0.1	520
2	Hotel Mulberry	9	88.2%	0.4	287
3	3 West Club	14	87.8%	1.6	133
4	Hilton Garden Inn New York West 35th	8	87.7%	0.7	896
5	Hotel Indigo NYC Financial District, an IHG Hotel	0	87.7%	-0.7	717
6	Hotel Mimosa	0	87.7%	-0.6	342
7	Hampton Inn Brooklyn Downtown	7	87.5%	0.9	621
8	Opera House Hotel	2	87.2%	-0.6	630
9	Best Western Premier Empire State Hotel	0	87.0%	-1.1	508
10	Homewood Suites Midtown Manhattan Times Square South	3	86.9%	0.0	1195
11	Pod 39	5	86.3%	0.1	2885
12	Courtyard by Marriott Times Square West	NEW	86.3%	---	1134
13	Radio City Apartments	-9	86.2%	-2.2	1457
14	Edge Hotel Washington Heights	NEW	86.0%	---	115
15	Madison LES Hotel	NEW	85.2%	---	105
16	The Historic Blue Angel Hotel Lexington Ave, Ascend Hotel Collection	NEW	84.9%	---	261
17	La Quinta Inn & Suites by Wyndham Times Square South	NEW	84.8%	---	1055
18	Sheraton LaGuardia East Hotel	NEW	84.8%	---	187
19	Hampton Inn Times Square Central	-1	84.4%	-1.7	1219
20	45 Times Square Hotel	NEW	84.4%	---	428

3-STAR HOTELS LOS ANGELES

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	The Prospect Hollywood	NEW	97.2%	NEW	143
2	The Metric - Los Angeles Downtown	NEW	94.2%	NEW	318
3	Magic Castle Hotel	NEW	93.2%	NEW	211
4	Hotel Mariposa	NEW	90.2%	NEW	479
5	Embassy Suites by Hilton Valencia	NEW	89.8%	NEW	303
6	Holiday Inn Express Hotel & Suites Hollywood Walk of Fame	NEW	89.3%	NEW	702
7	New Seoul Hotel	NEW	88.0%	NEW	376
8	Holiday Inn Express West Los Angeles	NEW	87.5%	NEW	518
9	Miyako Hotel Los Angeles	NEW	86.7%	NEW	775
10	Park Plaza Lodge Hotel	NEW	86.5%	NEW	966
11	Best Western Plus Commerce Hotel	NEW	86.4%	NEW	1306
12	Hyatt House LA - University Medical Center	NEW	86.4%	NEW	631
13	Short Stories Hotel	NEW	86.3%	NEW	337
14	Aventura Hotel	NEW	86.2%	NEW	591
15	Holiday Inn Express Los Angeles - LAX Airport, an IHG Hotel	NEW	85.9%	NEW	876
16	The Adler a Hollywood Hills Hotel	NEW	85.7%	NEW	939
17	Ocean View Hotel	NEW	85.7%	NEW	488
18	Hyatt Place Lax/Century Blvd	NEW	85.5%	NEW	990
19	Best Western Woodland Hills Inn	NEW	85.5%	NEW	155
20	Hotel Normandie	NEW	85.1%	NEW	622

CHAPTER 11



4-STAR HOTELS NEW YORK

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	The Hotel Chelsea	NEW	95.9%	---	157
2	Bryant Park Hotel	1	95.7%	0.9	668
3	Tempo by Hilton New York Times Square	NEW	95.7%	---	178
4	Casablanca Hotel by Library Hotel Collection	-3	95.2%	-0.6	364
5	NobleDEN Hotel	4	94.3%	1.3	515
6	Mint House at 70 Pine	-1	93.6%	-0.4	325
7	The Kimberly Hotel	-5	93.5%	-1.5	563
8	LUMA Hotel Times Square	-2	93.2%	-0.4	1519
9	Library Hotel by Library Hotel Collection	-5	93.2%	-1.0	196
10	Artezen Hotel	0	93.0%	0.3	426
11	Hilton Club West 57th Street New York	2	93.0%	0.7	166
12	Hotel Giraffe by Library Hotel Collection	0	92.7%	0.3	183
13	Hilton Club The Central at 5th New York	-6	92.6%	-0.9	482
14	Pestana Park Avenue	NEW	92.6%	---	415
15	The Ludlow Hotel	-7	92.5%	-0.6	331
16	Park Terrace Hotel	-5	92.4%	0.0	1150
17	EVEN Hotel New York - Times Square South, an IHG Hotel	NEW	92.0%	---	462
18	Hotel 50 Bowery, part of JdV by Hyatt	NEW	91.7%	---	692
19	Hotel Scherman	-2	91.5%	-0.2	430
20	Crowne Plaza HY36 Midtown Manhattan, an IHG Hotel	-1	91.3%	-0.1	830

4-STAR HOTELS LOS ANGELES

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Sunset Marquis	NEW	95.1%	NEW	216
2	Hotel 850 SVB West Hollywood At Beverly Hills	NEW	93.4%	NEW	138
3	The Georgian Hotel	NEW	92.8%	NEW	190
4	Luskin Hotel	NEW	92.3%	NEW	969
5	Montrose West Hollywood	NEW	92.1%	NEW	473
6	The Hoxton, Downtown LA	NEW	91.8%	NEW	477
7	El Royale Hotel Near Universal Studios Hollywood	NEW	91.1%	NEW	279
8	The Garland	NEW	90.8%	NEW	1249
9	Shore Hotel	NEW	90.7%	NEW	936
10	Hilton Woodland Hills / Los Angeles	NEW	90.0%	NEW	449
11	Le Parc at Melrose	NEW	89.7%	NEW	279
12	Plaza La Reina	NEW	89.7%	NEW	231
13	citizenM Los Angeles Downtown	NEW	89.4%	NEW	1428
14	Huntley Santa Monica Beach	NEW	89.4%	NEW	1196
15	The Ambrose Hotel	NEW	89.4%	NEW	176
16	Grafton on Sunset	NEW	88.7%	NEW	266
17	Loews Hollywood Hotel	NEW	88.4%	NEW	2076
18	Omni Los Angeles Hotel at California Plaza	NEW	88.4%	NEW	711
19	JW Marriott Los Angeles L.A. LIVE	NEW	87.9%	NEW	709
20	Palihouse West Hollywood	NEW	87.8%	NEW	307

CHAPTER 11



5-STAR HOTELS NEW YORK

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	Four Seasons Hotel New York	NEW	98.8%	---	170
2	Pendry Manhattan West	0	96.6%	-0.2	223
3	The Wallace	-2	95.6%	-1.4	663
4	The Wall Street Hotel	-1	95.6%	-0.2	333
5	The Langham, New York, Fifth Avenue	-1	95.1%	0.1	779
6	Hard Rock Hotel New York	2	92.0%	-0.5	1739
7	Conrad New York Downtown	-2	91.9%	-1.5	709
8	The Beekman A Thompson Hotel	4	91.2%	0.1	333
9	Baccarat Hotel and Residences New York	NEW	91.2%	---	284
10	The Plaza	-1	91.1%	-1.2	449
11	Refinery Hotel	2	91.0%	0.0	475
12	Four Seasons Hotel New York Downtown	4	91.0%	1.0	279
13	The Bowery Hotel	NEW	91.0%	---	158
14	The Dominick Hotel	6	90.9%	1.7	489
15	Trump International New York	-9	90.9%	-2.4	354
16	ModernHaus SoHo	-9	90.4%	-2.2	422
17	The Carlyle, A Rosewood Hotel	-7	90.3%	-1.6	165
18	Park Hyatt New York	-1	90.3%	0.7	162
19	Loews Regency New York Hotel	NEW	89.5%	---	297
20	1 Hotel Central Park	-6	89.4%	-1.1	366

5-STAR HOTELS LOS ANGELES

	Hotel	Ranking Change	Q2+Q3 2023 GRI	GRI Change.	Review Volume
1	The Maybourne Beverly Hills	NEW	96.9%	NEW	145
2	L'Ermitage Beverly Hills	NEW	95.8%	NEW	249
3	The Beverly Hills Hotel - Dorchester Collection	NEW	95.4%	NEW	273
4	The Peninsula Beverly Hills	NEW	92.2%	NEW	138
5	Casa Del Mar	NEW	92.1%	NEW	306
6	Four Seasons Hotel Los Angeles at Beverly Hills	NEW	91.9%	NEW	249
7	Downtown Los Angeles Proper Hotel, a Member of Design Hotels	NEW	91.7%	NEW	255
8	Pendry West Hollywood	NEW	91.7%	NEW	246
9	Fairmont Century Plaza	NEW	91.4%	NEW	378
10	Sunset Tower Hotel	NEW	91.2%	NEW	101
11	Beverly Wilshire, A Four Seasons Hotel	NEW	91.1%	NEW	401
12	Conrad Los Angeles	NEW	90.9%	NEW	407
13	The West Hollywood EDITION	NEW	90.4%	NEW	164
14	The London West Hollywood at Beverly Hills	NEW	90.1%	NEW	432
15	Shutters on the Beach	NEW	89.8%	NEW	332
16	Oceana Santa Monica, LXR Hotels & Resorts	NEW	89.3%	NEW	231
17	Waldorf Astoria Beverly Hills	NEW	88.9%	NEW	227
18	Hotel Per La	NEW	87.7%	NEW	1076
19	Hotel Figueroa - Unbound Collection by Hyatt	NEW	87.5%	NEW	667
20	1 Hotel West Hollywood	NEW	86.4%	NEW	379



Guest
Experience
Benchmark

Reputation Strategies

CHAPTER

12

WHAT DO GUESTS COMPLAIN MOST ABOUT IN REVIEWS?

The biggest sources of guest complaints are not always what hoteliers might expect. Using Shiji ReviewPro's AI-powered semantic analysis tools, we mined more than 2.5 million negative mentions in reviews from the third quarter of 2023. Here we share the 10 categories that received the highest proportion of complaints. If hoteliers wish to improve guest loyalty and online reputation, they need to pay closer attention from hoteliers.

Note that this is a measure of the ratio of negative to positive mentions, not of volume. In terms of the sheer volume of negative comments, the top five categories were Room, Food and Drinks, Cleanliness, Facilities, and Establishment. For access to the complete data set, contact Shiji ReviewPro.

01. Medical and Health: 70.3% of Mentions Were Negative

People aren't inclined to rave about health problems while travelling, so perhaps it's no surprise that this category received the highest proportion of negative reviews. Covid safety concerns have dissipated, whereas complaints about sickness, disabled facilities,

and food poisoning are rampant. While travellers don't normally blame hotels for illnesses (unless it's food poisoning), if staff handle medical issues with compassion, flexibility, and a bit of TLC it can go a long way to preventing complaints. And hotels have a responsibility to accommodate guests with disabilities as best they can.

02. Maintenance: 67.5% of Mentions Were Negative

Don't blame the maintenance department – many of these complaints arise from issues beyond their control, primarily run-down rooms and facilities. A spate of construction complaints indicates that renovations are underway, but hotels aren't managing the

disruptions as well as they could. Meanwhile, guests are also griping about broken items that could easily be fixed, from furniture to plumbing to door locks. And this summer the comments about air conditioning were scorching. The planet isn't cooling down; it's time to upgrade those units.

WHAT DO GUESTS COMPLAIN MOST ABOUT IN REVIEWS?

03. TECHNOLOGY: 62.5% OF MENTIONS WERE NEGATIVE

Technology is playing an increasing role in the guest experience. Judging by reviews, the transition is not going well. However, most complaints aren't about mobile check-in or lobby kiosks, they're about the television, remote control, and telephone (which

apparently guests still use). Notably, complaints about hotel apps, streaming devices, and automated services are creeping up. While travellers can't expect in-room technology to equal their at-home systems, it should be easy to operate, functional, and relatively up to date.

04. INTERNET: 62.1% OF MENTIONS WERE NEGATIVE

Guests have an insatiable appetite for internet bandwidth and zero tolerance for spotty service. A common beef is that Wi-Fi isn't free, but the most frequent complaints are related to the quality of the connection. Guests use all sorts of terms to describe the problem, from

slow, unstable, and patchy to agonising, terrible, and malísimo. The complaints aren't limited to remote properties, they're rampant in city hotels too. Hotels must treat Wi-Fi as an essential utility. A bad connection has the same effect as a cold shower.

05. BATHROOMS: 61.3% OF MENTIONS WERE NEGATIVE

Travellers are extra finicky about bathrooms. If they don't meet expectations, hotels will hear about it. Many complaints are related to size or layout, which may require a major renovation that simply isn't in the budget. Yet a lot of problems are well within the hotel's

control, from the condition of the shower, toilet, bathtub, and sink to the quality of toiletries, towels, and toilet paper. And then there's the ick factor that fast-tracks review complaints: stray hairs, smears, spiders, odours, leaks, and poor ventilation.

WHAT DO GUESTS COMPLAIN MOST ABOUT IN REVIEWS?

06. VALUE: 42.9% OF MENTIONS WERE NEGATIVE

Considering the sharp rise in room rates, it's no surprise that hotel guests are complaining about value. Comments range from "unreasonable" to "outrageous," with many complaints citing unexpected fees and poor handling of payments and deposits.

With greater transparency in fees, proper payment protocols, and modern payment systems, many of these issues can be prevented. There's a saying: "You know you're priced right when your customers complain but buy anyway." That's a risky strategy. A better approach is to ensure quality and service are always commensurate with pricing.

07. SECURITY: 39.4% OF MENTIONS WERE NEGATIVE

Safety and security are a big concern for travellers, who are often out of their comfort zone in places they don't know and where they don't speak the language. Most complaints are related to perceived danger, theft, and issues with safety deposit boxes, as well as poor security and unsafe conditions on property. Then there are the fire alarms

that sound in the middle of the night. While security issues often occur off property, comments suggest that hotel staff could manage them better with advanced warnings about unsafe areas and more empathy and support.

08. BED: 37.1% OF MENTIONS WERE NEGATIVE

If there's one thing travellers want from a hotel, it's a restful night's sleep. That's proving to be difficult judging by the frequency of complaints about uncomfortable mattresses, lumpy pillows, and poor-quality linens. Then there are the grossed-out comments about bedbugs, smelly pillows, and stains on sheets,

blankets, and duvet covers, which make a restful sleep virtually impossible. While beds will always be too hard for some and too soft for others, higher quality bedding and closer scrutiny from housekeeping staff can go a long way to ensuring guests receive the beauty rest they need.

WHAT DO GUESTS COMPLAIN MOST ABOUT IN REVIEWS?

09. AMBIENCE: 36.4% OF MENTIONS WERE NEGATIVE

Ambience is an intangible aspect of the guest experience that includes everything from décor and lighting to temperature and employee uniforms. However, the most frequent complaints by far are about noise. Sometimes the disturbances come from

outside and can't be controlled, but most originate from inside the hotel – thin walls, screaming kids, loud music, chatty staff, slamming doors, and noisy HVAC, elevators, bars, and construction. With better soundproofing and more proactive management of noise issues, hotels could easily

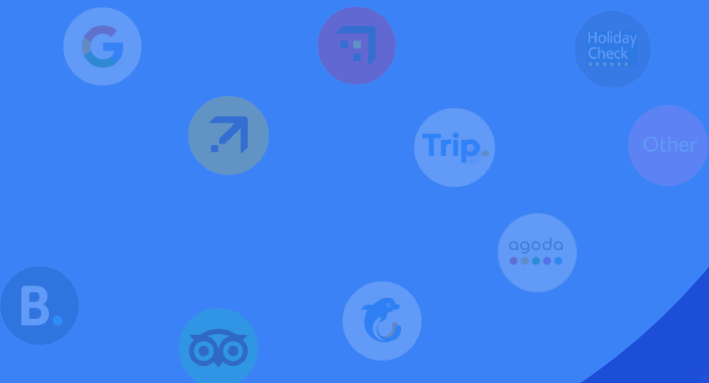
10. ROOM: 36.0% OF MENTIONS WERE NEGATIVE

With almost 400,000 negative mentions in the quarter, hotel rooms received more complaints than any other category, driving down the Global Review Index by 1.9 points. Most complaints were about air conditioning, sleep quality, and the condition of doors,

windows, and carpets, while room cleanliness, size, and supplies also received frequent gripes. Rooms stand as the category with the most potential to improve the guest experience. Judging by all the construction complaints received this quarter, hotels are rising to the challenge.



Methodology



Methodology

Countries

ASIA PACIFIC	EUROPE	LATIN AMERICA & CARIBBEAN	MIDDLE EAST	AFRICA	NORTH AMERICA
Australia	Croatia	Argentina	Bahrain	Algeria	Canada
China	Czech Republic	Anguilla	Iran	Egypt	United States
Fiji	Denmark	Antigua & Barbuda	Jordan	Kenya	
India	France	Aruba	Kuwait	Morocco	
Indonesia	Germany	Bahamas	Oman	Nigeria	
Japan	Greece	Barbados	Qatar	South Africa	
Malaysia	Ireland	Brazil	Saudi Arabia	Tanzania	
New Zealand	Italy	Chile	United Arab Emirates	Tunisia	
Philippines	Malta	Colombia			
Singapore	Netherlands	Costa Rica			
South Korea	Poland	Cuba			
Thailand	Portugal	Curaçao			
Vietnam	Spain	Dominica Republic			
	Sweden	Ecuador			
	Switzerland	Granada			
	Turkey	Guadalupe			
	United Kingdom	Guatemala			
		Jamaica			
		Mexico			
		Peru			
		Puerto Rico			
		Saint Lucia			
		Trinidad and Tobago			
		Turks and Caicos			
		Uruguay			
		Virgin Islands (U.S.)			

Methodology

City Data & Rankings

Unlike the Global and Regional sections, data in the City Benchmark and City Hotel Rankings covers two quarters, from April 1 to September 30, 2023. Due to variances in the makeup of hotels in each city, the City Benchmark is displayed in alphabetical order rather than ranked by Global Review Index.

To qualify for City Hotel Rankings, hotels must have received at least 100 online reviews in the three-quarter period. Aparthotels are included in the rankings provided they offer services comparable to hotels in their star category and have at least 10 apartments. Booking.com was used as the primary reference for star categories. The total data set was 5,842 hotels. Additional cities will be added in future reports.

Global Review Index™ (GRI). Shiji ReviewPro's industry-standard online reputation score derived from a proprietary algorithm based on review data collected from more than 140 OTAs and review sites in over 45 languages.

Source Index. A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm.

Department Index. Review scores measured by department or attribute such as Service, Cleanliness, and Value derived from Shiji ReviewPro's proprietary algorithm. Not all review sources allow department ratings; therefore, this data is drawn from a smaller sample of reviews than the Global Review Index.

Semantic Analysis. Shiji ReviewPro's AI-powered semantic analysis tools involves scan review comments, group them into Categories and Concepts, and qualify the sentiment as positive or negative. This turns freeform commentary into quantifiable metrics and can be highly valuable for drilling down on strengths and weaknesses at a more granular level.

Impact Analysis. ReviewPro's Semantic Analysis tools quantify the impact of Categories in review comments on the Global Review Index. This information helps hoteliers prioritise areas that have the highest impact on overall guest satisfaction.

Responsible Reviews. Reviews from sources that permit management responses. Ratings-only reviews are not included in the calculations.

Global Review Index (GRI)

The **Global Review Index (GRI)** is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 online travel agencies (OTAs) and review sites in over 45 languages.

Recognising the impact of online reputation on revenue, thousands of Shiji ReviewPro clients worldwide use the GRI to track review performance, set quality objectives, and benchmark performance against competitors.

A 1-point increase in a hotel's Global Review Index™ (GRI) can lead to growth of up to:

+0.89%

In ADR

+0.54%

In Occupancy

+1.42%

In RevPAR



Cornell University
School of Hotel Administration
The Center for Hospitality Research





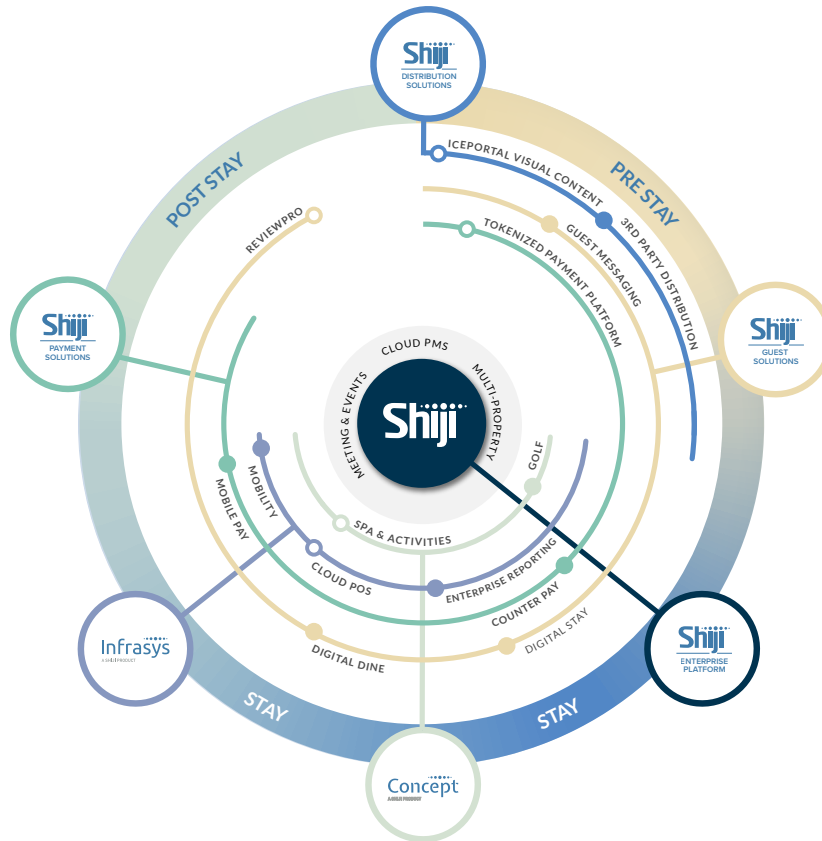
Guest
Experience
Benchmark

About Shiji ReviewPro

CHAPTER

14

CHAPTER 14



About Shiji ReviewPro

Shiji ReviewPro provides the world's leading guest experience software solutions in one powerful platform. Our aim is to help the hospitality industry become more profitable by gathering, understanding, and acting upon guest feedback data. Our unified Guest Experience Platform includes Hotel Reputation, Guest Surveys, Case Management, and Guest Communications.

Shiji's ReviewPro owns the industry-standard online reputation score, the Global Review Index (GRI), a propriety algorithm based on review data collected from +140 OTAs and review sites in +45 languages. Globally renowned brands like Radisson Hotel Group, Kempinski Hotels, and Mèlia Hotels International, rely on Shiji's ReviewPro to continually learn from their guests, improve their operations, enjoy steady growth, and drive revenue. Our flexible, cloud-based guest experience platform is fully secure and integrated to enable our clients to focus on serving their clients in the best possible way. We offer over a decade of experience and investment in innovation to ensure we continue to be the benchmark of the industry.

With over 60,000 establishments in +150 countries, Shiji ReviewPro offers the technology, support, and education to empower you to be better.

Join us.

CHAPTER 14

Conclusion:

Unpredictability: The New Normal

Looking ahead to 2024, the outlook for the global hotel industry looks positive. Yet hotels face a number of headwinds that stand to have a direct impact on hotel operations and the guest experience – and, in turn, online reputation.

An evolving business mix. As leisure demand normalises, continued recovery of business, group, and international travel will alter travel patterns and shift the makeup of guests.

Labour shortages. While staffing pressures have eased, hotels continue to struggle to recruit, retain, and reskill the labour force they need to uphold standards of quality and service.

Inflation. Inflation rates have begun to level off, but elevated operational costs are putting downward pressure on budgets for labour, property upkeep, and capital expenditures.

Higher prices. Hoteliers have budgeted for pricing increases in 2024, in part to offset high operating costs, but may face a backlash in negative reviews if quality and service standards lag.

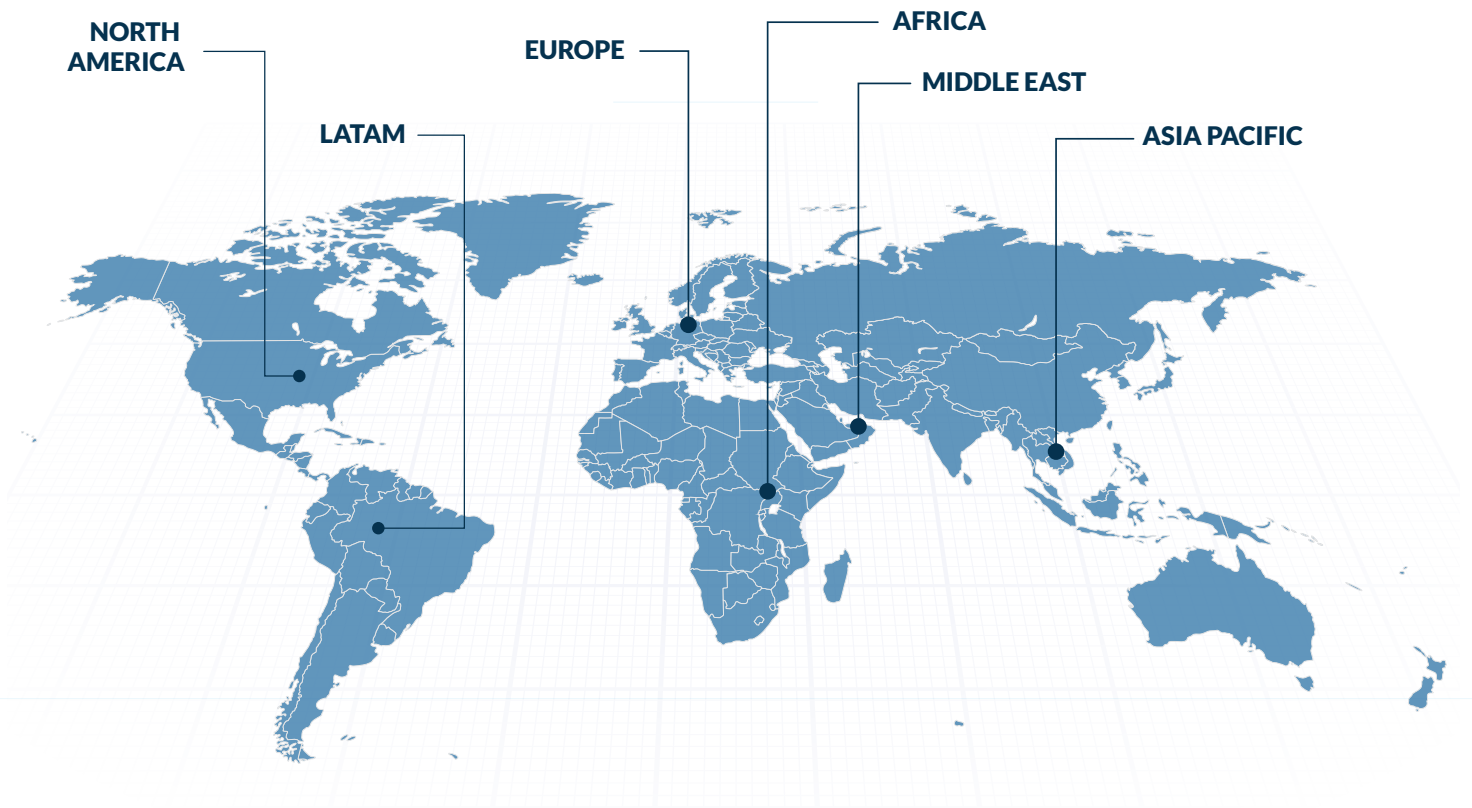
Technology. As automation plays an increasing role in hotel operations, it may become a rising source of friction for hotel guests if not properly managed by hotels.

Climate change. More extreme weather is expected to disrupt travel patterns in 2024 and may change people's decisions about when and where to travel.

Global conflicts. The recent outbreak of war in Israel and Gaza, together with the ongoing war in Ukraine, may disrupt travel patterns and drive up fuel prices in 2024.

Pandemic. A new strain of Covid-19 or an entirely new pandemic could slow travel again or even bring it to a standstill.

Under the circumstances, hotels would be wise to continue to closely monitor guest feedback in reviews to understand how traveller sentiment and behaviour are changing and take the actions needed to keep guests happy and loyal in 2024 and beyond.



Guest Experience Benchmark



Guest Experience Benchmark

Q³
2023

The Definitive Report on Guest
Experience Benchmarking.

www.shijigroup.com
