

Shiji Group 2023



Guest
Experience
Benchmark

Q₂
2023

Sources for the Guide





Contents

01	Introduction	08	Latin America & Carriibbean
02	Key Findings	09	Middle East
03	Global Data	10	Africa
04	Regional Data	11	North America
05	City Benchmark	12	Reputation Strategies
06	Asia Pacific	13	Methodology
07	Europe	14	About Shiji ReviewPro

Copyright © 2023 Shiji Group. The trademarks "Global Review Index" and "GRI" are the exclusive property of Shiji ReviewPro. All rights reserved.

No part of this whitepaper may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other non-commercial uses permitted by copyright law. All trademarks, service marks, trade names, and logos appearing in this whitepaper are the property of their respective owners. The inclusion or reference to any Trademark within this whitepaper does not imply any affiliation with, endorsement by, or sponsorship of Shiji by the respective trademark owner, nor does it constitute a challenge to the validity, ownership, or status of any such Trademark.



Guest Experience Benchmark

CHAPTER

01

INTRODUCTION

The Guest Experience Benchmark: Now Featuring City Hotel Ranking and City Benchmark

Welcome to the Q2 2023 edition of the Guest Experience Benchmark. We have analysed over 3 million reviews and 9 million review comments from 9,500 hotels around the world. This represents the most comprehensive collection of review data available to hotels today.

In this edition we have enriched the report with a new section entitled 'City Benchmark'. This includes the average Global Review Index™ (GRI) for 50 cities around the world presented in alphabetical order.

Additionally, we have added a 'City Hotel Ranking' for each region. This includes the top 60 hotels (20 for each star category) as ranked by GRI in New York, Dubai, Cape Town, Sydney, London, and Rio. This is a unique snapshot of the globe's top hotels.

Is your hotel on the list?

If this edition feels lighter than previous editions, it's because the reference sections have been pulled out. To request the detailed data charts in these sections, simply [email us](#).

For additional support on how to improve or maintain your online reputation, don't miss the Insights & Strategies section near the back of the report.

At Shiji ReviewPro, we recognise that behind this mountain of review data are teams of dedicated hotel employees working hard to meet guest expectations, often under suboptimal conditions. Our congratulations go out to everyone for their successes in upholding – and even improving – guest satisfaction this year.



Guest Experience Benchmark

Q₂
2023

CHAPTER

02

KEY

FINDINGS

Our Key Findings for Q2 2023

REVIEW SCORES

Hotels Continue to Recover Review Scores, with Asia Pacific Leading the Pack

Globally, hotels managed to increase the Global Review Index by 1.0 points in Q2 2023 relative to Q2 2022, achieving a score of 85.5%. However, the GRI was still 0.9 points lower than the pre-pandemic score of 86.4% in Q2 2019. Four and 5-star hotels showed the biggest improvements, both growing their GRI by 1.2 points, whereas 3-star hotels grew by 0.8 points.

Of the six regions, hotels in Asia Pacific earned the highest GRI, at 87.2%. The second highest GRI came from the Latin America & Caribbean region, at 86.1%. At 83.4%, the Middle East had the lowest GRI, followed by North America at 84.4%.

REVIEW VOLUME

Global Review Volume Soars by Almost 20% but Falls Short of 2019 Levels

Global review volume increased by 19.9% from Q2 2022 to Q2 2023, representing almost 500,000 incremental reviews of hotels in the data set. However, review volume was still almost 8% below pre-pandemic Q2 2019 levels. Asia Pacific showed the highest growth rate, at 70.6%, followed by Africa at 23.4%. Review volume stayed relatively flat in Europe and North America.

CHAPTER 2



REVIEW MARKET SHARE

Booking.com Generates 39.2% of Total Reviews but Loses Market Share

Once again, Booking.com dominated review market share, generating 39.2% of total reviews in the quarter. However, the OTA lost 8.7 points in share relative to Q2 2022. Much of that was picked up by Google, which accounted for 31.6% of review share, an increase of 5.0 points. Tripadvisor generated 10.4% and Expedia 4.8%.

While Booking.com lost market share in every region, it maintained its dominance in Europe, with 64.4% of market share, and in the Middle East, with 49.5%. However, Google had a larger share than Booking.com in Latin America & Caribbean (44.0%), Asia Pacific (31.5%), and Africa (41.9%). In North America, Expedia maintained a stronger foothold than in other regions, generating 19.4% of reviews.

SOURCE INDEXES

Google Reigns with the Highest Average Review Score, Whereas Booking.com's Relatively Low Score Is Growing

Of the top five review sources, Google had the highest Source Index, at 86.2%, whereas Booking.com had the lowest Source Index, at 82.5%. Ctrip and Trip.com had higher indexes, but their share of reviews were only 2.5% and 2.1% respectively.

In the Middle East, Tripadvisor's Source Index was unusually high relative to the other regions, at 90.0%, whereas Booking.com's was particularly low, at 80.3%. In North America, Tripadvisor's Source Index was only 79.0%, 5.0 points lower than the global average.

DEPARTMENT INDEXES

Room and Value Ratings Continue to Lag While Service Ratings Receive a Bump

At the global level, the Value Index and Room Index continued to underperform relative to the other top Department Indexes. However, the Value Index improved by 2.7 points relative to Q2 2022, increasing to 84.2%. Meanwhile, the Room Index increased by a slight 0.3 points to 85.7% but was particularly low within the 3-star segment, at 79.1%. The Service Index increased by 1.4 points to 87.9%.

Despite its lower overall GRI, Department Indexes were significantly higher in the Middle East than in other regions, with a Service Index of 91.9%, Cleanliness Index of 91.7%, Room Index of 89.2%, and Value Index of 88.8%.

CHAPTER 2



SEMANTIC ANALYSIS

Room and Cleanliness Have the Highest Negative Impact on Review Scores; Experience Has the Highest Positive Impact

In semantic analysis of over 9 million mentions in review comments, 76.0% of mentions were positive and 24.0% were negative. Ctrip had the highest ratio of positive comments (85.3%), whereas Booking.com had the highest ratio of negative comments (34.9%). Reviews written in Chinese (85.7%) and German (79.2%) had the highest ratios of positive comments, whereas reviews written in French (26.7%) and Italian (26.6%) had the highest ratios of negative comments.

In impact analysis of review comments, the Room category had the highest negative impact on the Global Review Index, driving it down by 1.8 points, followed by Cleanliness (-1.2 points). The Experience category had the highest positive impact, boosting the GRI by 0.8 points.

MANAGEMENT RESPONSES

Hoteliers Respond to 61.6% of Reviews, Led by the Middle East and Africa

At the global level, hoteliers responded to 61.6% of responsible reviews in Q2 2023, an increase of 3.6 points over Q2 2022. Positive reviews received a response rate of 63.5% and an average response time of 3.6 days, while negative reviews received a response rate of 53.7% and an average response time of 4.3 days.

Of the six regions, hotels in the Middle East responded to the highest proportion of reviews (76.5%), followed by hotels in Africa (73.8%). Hotels in North America responded to the lowest proportion (56.1%), followed by Latin America & Caribbean (56.5%).

CHAPTER 2



NEW DATA

CITY DATA

The Bar Was Extremely High in City Hotel Rankings, with a Top Score of 98.6%

In city hotel rankings, the 5-star Belmond Copacabana Palace in Rio de Janeiro achieved the highest Global Review Index of all hotels in the six cities in the report, at 98.6%. The 18 on Kloof Guest House in Cape Town had the highest GRI of 4-star hotels, at 97.9%. And the Tintagel Guest House in Cape Town had the highest GRI of 3-star hotels, at 96.1%.

In Dubai and London, the bar was particularly high among 5-star hotels, with all 20 hotels in the top rankings in each city achieving a GRI of 94.0 or higher.

The data set in the Global and Regional sections of this report is derived from 3,008,810 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 53 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 Experience Benchmark

CHAPTER

03

GLOBAL DATA

Global: Market Overview

The second quarter of 2023 marked the continuation of the recovery of travel in regions around the world. As of June 2023, global travel performance was 4% above 2019 levels, with all major regions having achieved full recovery to pre-pandemic levels, according to Skift's Travel Health Index.¹

Global travel performance recovered to 2019 levels in all major regions

The Global Review Index grew by 1.0 points to 85.5%

Review volume increased by almost 20%

Booking.com lost 8.7 points in market share

The Room Index drove down the GRI by 1.8 points

Hoteliers responded to 61.6% of reviews, an increase of 3.6 points

The pace of recovery varied by market segment, however. Leisure travel remained strong, while international travel and business travel continued to gain momentum. The combination generated strong demand and unprecedented pricing power for hotels.

In some regions, ADR (average daily rate) and RevPAR (revenue per available room) reached all-time highs, whereas occupancy rates lagged slightly behind pre-pandemic levels. Meanwhile, disruptions set in motion by the pandemic, including high inflation, escalating operating costs, and labour shortages, continued to place strains on operations, staffing, and profitability.

Nevertheless, hotels managed to improve overall guest satisfaction ratings and review indexes in key departments, all the while finding time to respond to a higher proportion of online reviews.

Want to know more about your
online reputation?

TALK TO US

¹ Skift Travel Health Index. July 2023.

Global: GRI Metrics

In spite of the challenges faced by hotels, Q2 2023 marked the second consecutive quarter of improvements to the Global Review Index this year.

At 85.5%, the Global Review Index for our global data set was up by 1.0 points over the same quarter in 2022 and virtually on par with Q2 2021 (+0.1 points). However, the GRI was still 0.9 points lower than the Q2 2019 score of 86.4%.

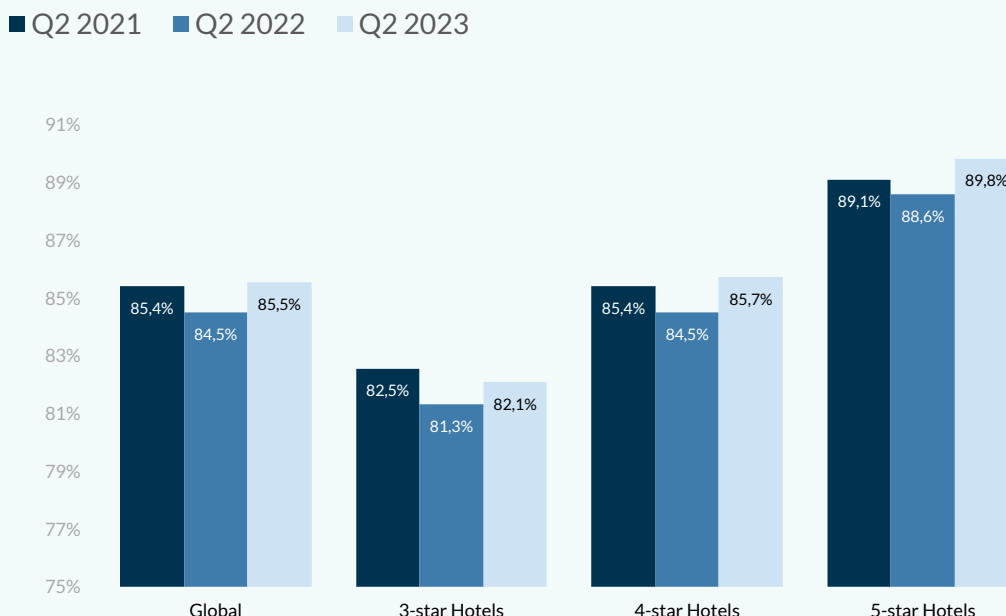
Given higher staffing levels and abundant amenities, perhaps it's no surprise that 5-star

hotels earned the highest GRI (89.8%) of the three star segments, followed by 4-star hotels (85.7%) and 3-star hotels (82.1%). Four and 5-star hotels also showed the strongest recovery, both increasing the GRI by 1.2 points over Q2 2022, with 5-star hotels falling just short of the 90th percentile. The GRI for 3-star hotels increased by 0.8 points.

Is the divide among star segments growing? Since Q2 2021, 5-star hotels have increased their GRI by 0.7 points, whereas 4-star hotels are up by 0.3 points and 3-star hotels have fallen by 0.4 points.

Global: Global Review Index™ (GRI)

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



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.

SOURCE


Global: Review Volume

In a continuation of a pattern observed since the pandemic, global review volume grew by almost 20% from Q2 2022 to Q2 2023, an increase of 76.7% relative to Q2 2021.

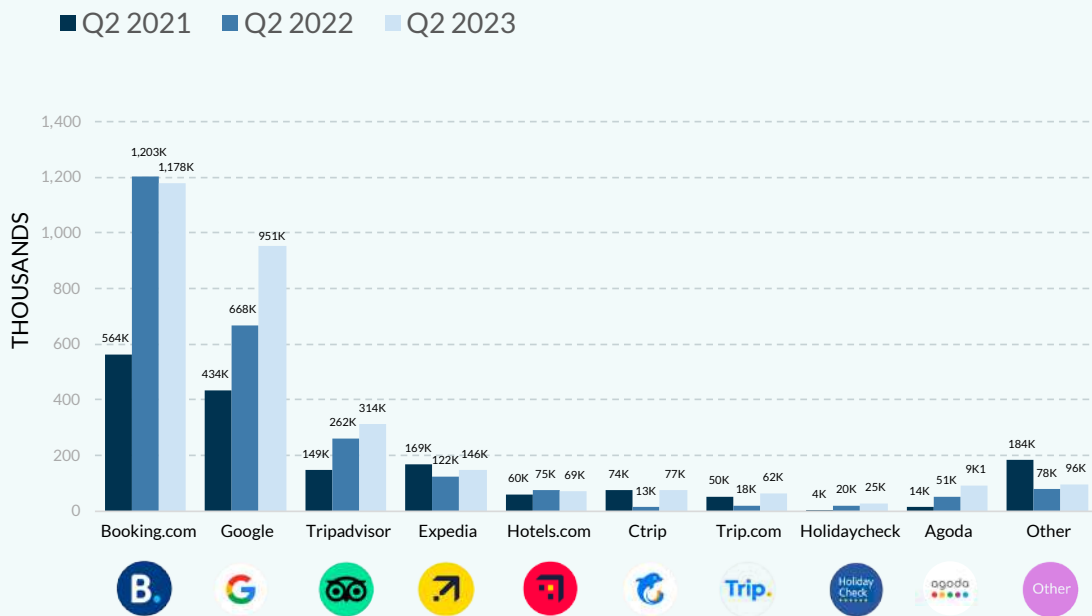
Two China-based OTAs led the way, with Ctrip increasing its volume almost fivefold from Q2 2022 and Trip.com growing volume by over 250%.

However, the two OTA represented only 2.5% and 2.1% respectively of total reviews in the quarter.

Google also saw a substantial increase, growing volume by 42.3% in the quarter, whereas Tripadvisor and Expedia each grew by almost 20%. Of the top review sources, only Hotels.com and Booking.com fell in volume.

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

SOURCE

Shiji REVIEWPRO

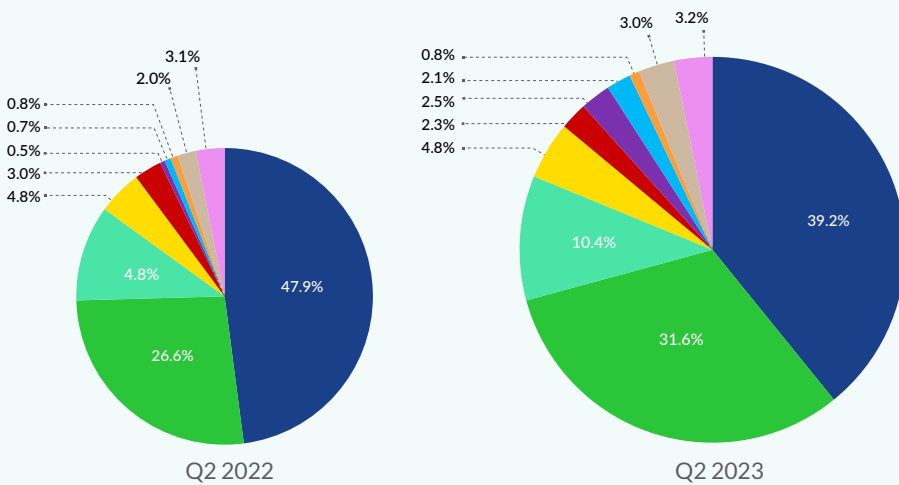
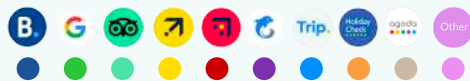
Global: Share of Reviews Per Source

Of the 53 review sources and online travel agencies (OTAs) from which reviews were aggregated, Booking.com once again dominated review market share, generating 39.2% of reviews in the second quarter of 2023. However, while Booking.com’s review volume has remained relatively flat over the past year, global review volume grew by almost 20%, resulting in a loss in market share for the OTA of 8.7 points.

A large proportion of Booking.com’s share was taken by Google, which grew by 5.0 points, generating 31.6% of reviews. Tripadvisor occupied the third-highest market share, at 10.4%. Expedia represented only 4.8% of total reviews, a loss of 5.1 points since Q2 2021. Hotels.com represented 2.3% of review share.

Global: Share of Reviews 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.

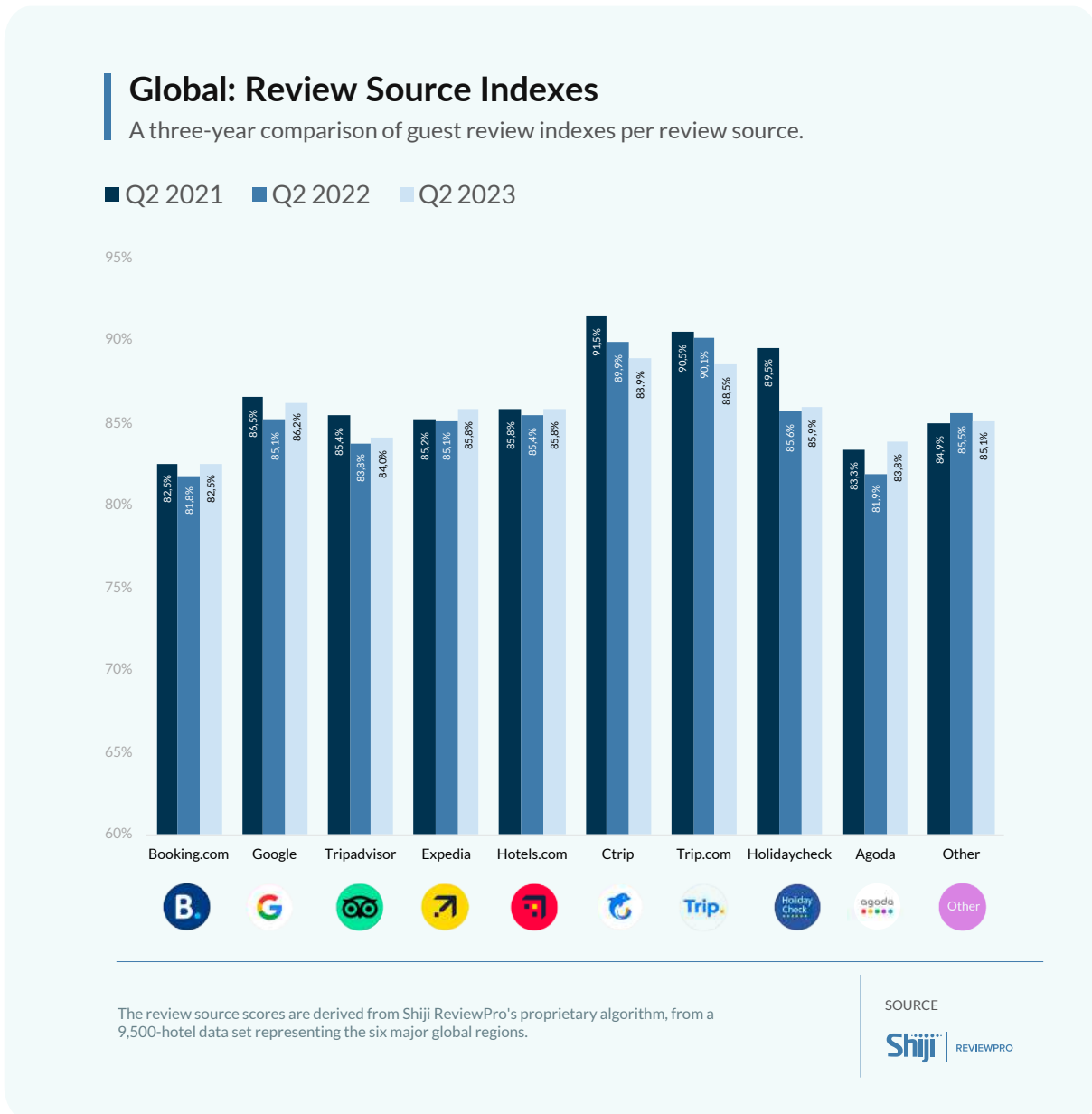
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	47.9%	26.6%	10.4%	4.8%	3.0%	0.5%	0.7%	0.8%	2.0%	3.1%
2023	39.2%	31.6%	10.4%	4.8%	2.3%	2.5%	2.1%	0.8%	3.0%	3.2%
Change Q2 22 vs Q2 23	- 8.8	5.0	0.0	0.0	- 0.7	2.0	1.4	0.0	1.0	0.1

Global Review Source Indexes

Booking.com managed to recover some of its Source Index in Q2 2023, increasing by 0.8 points over the same quarter the previous year. However, at 82.5%, the OTA still had the lowest Source Index of all major review sources.

Despite large increases in review volume, Ctrip and Trip.com managed to maintain the highest Source Indexes, at 88.9% and 88.5% respectively. Google reviews achieved the third highest index, at 86.2%.



Global Department Indexes

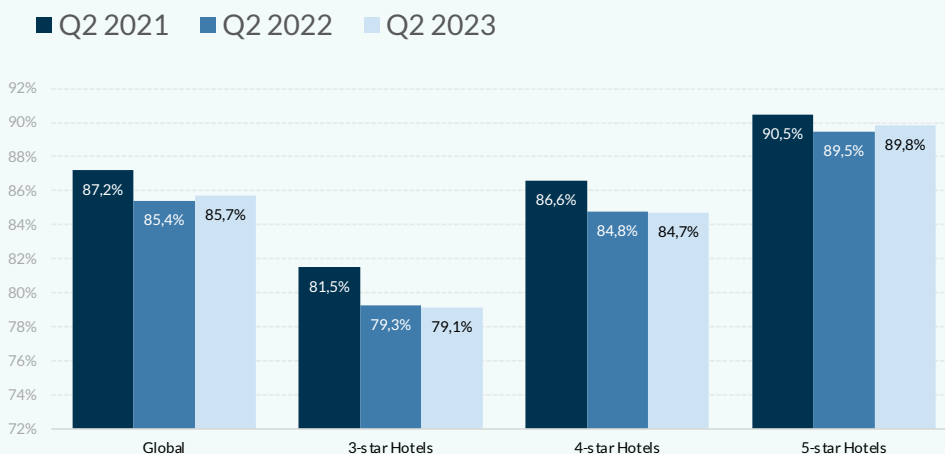
At 91.5%, the Location Index earned the highest score of the major Department Indexes in Q2 2023. Interestingly, this was an increase of 1.4 points over Q2 2022. It's a safe assumption that few hotels moved their location, yet travellers were generally more satisfied with their hotel's location this year.

at 87.9%, an increase of 1.4 points. The award for most improved goes to the Value Index, which increased by 2.7 points to 84.2% despite substantial increases in room pricing during this period. However, the Value Index was still the lowest of the top five Department Indexes.

Of the top five Department Indexes, the Cleanliness Index achieved the second highest score, at 88.8%, a 0.7-point increase from Q2 2022. The Service Index came next,

Global: Room

Individual department index scores, from a global data set, per star rating.

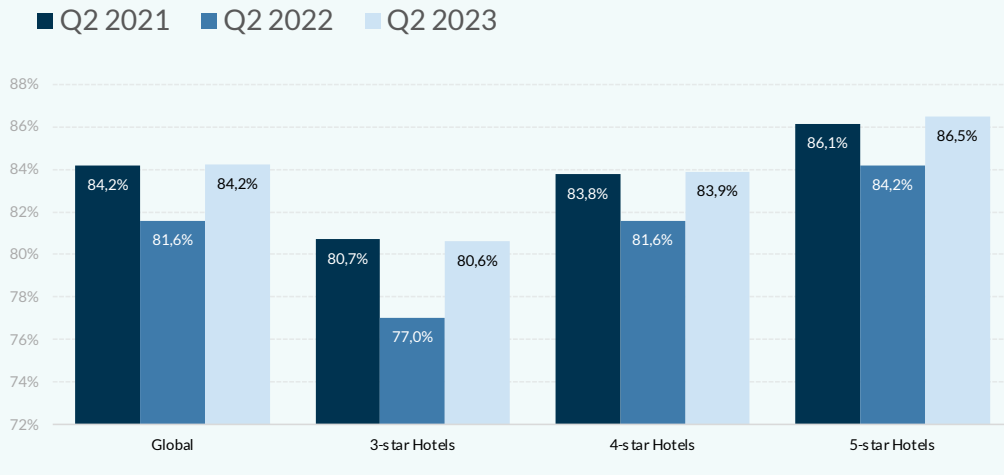


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE

Global: Value

Individual department index scores, from a global data set, per star rating.

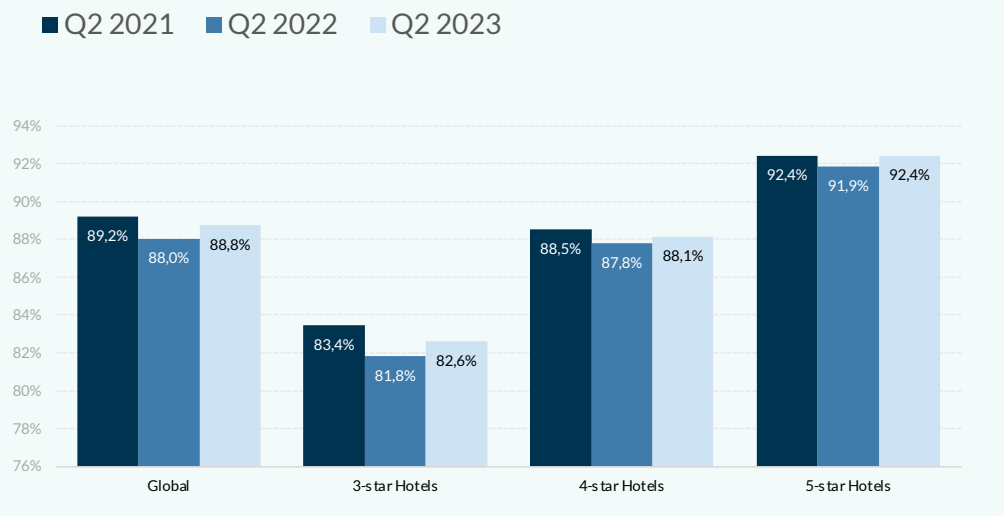


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE


Global: Cleanliness

Individual department index scores, from a global data set, per star rating.

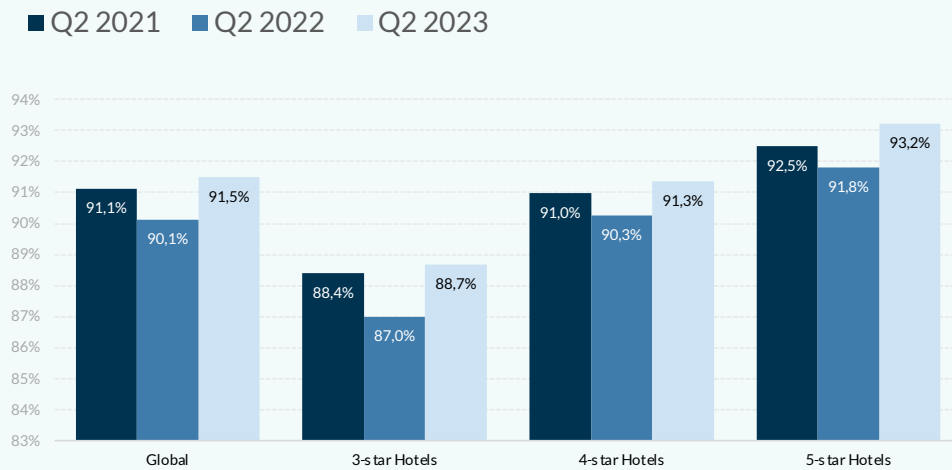


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE


Global: Location

Individual department index scores, from a global data set, per star rating.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



Want to know more about your online reputation?

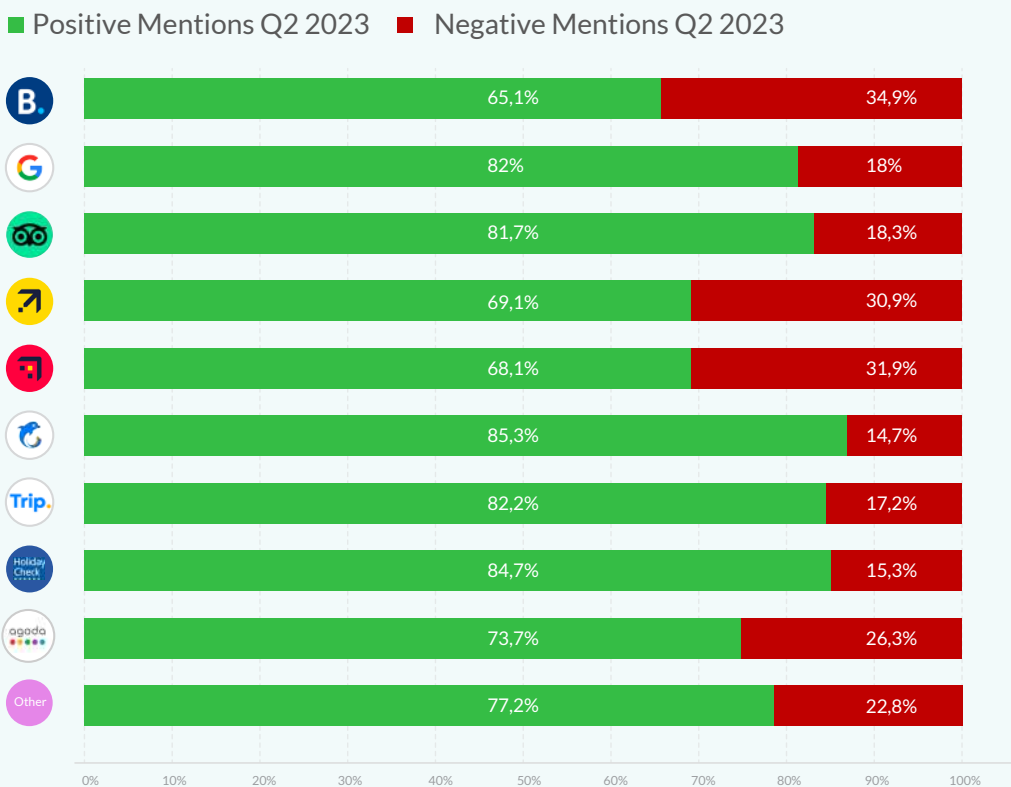
TALK TO US

Global: Semantic Analysis

In semantic analysis of over 9 million mentions in review comments, 76.0% of mentions were positive and 24.0% were negative. Of the top review sources, Ctrip and HolidayCheck reviews had the highest proportion of positive mentions, although Trip.com and Google weren't far behind. Booking.com and Hotels.com had the highest proportion of negative mentions.

Global: Semantic Analysis

The percentage of positive and negative mentions from online reviews, per review source.



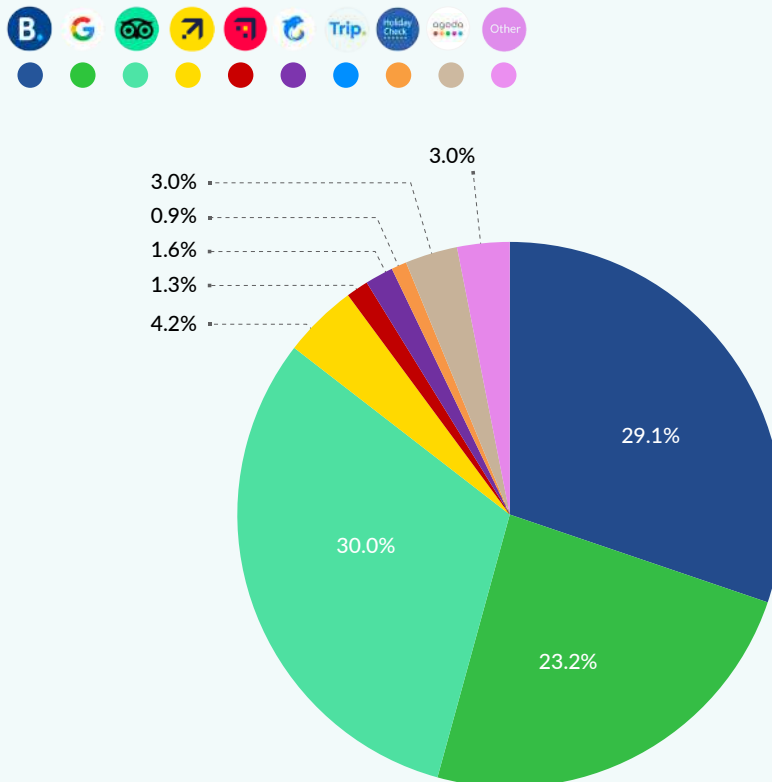
Shiji ReviewPro's AI-powered semantic analysis tool processes millions of online guest reviews to gain qualitative analysis. It does this by grouping reviews into categories and dividing by positive and negative sentiment. This allows hoteliers to gain a deep understanding of the content of reviews and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

SOURCE

Global: Semantic Analysis

Global: Share of Mentions by Source

Percentage of total mentions extracted from online guest reviews per review source, in Q2 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.

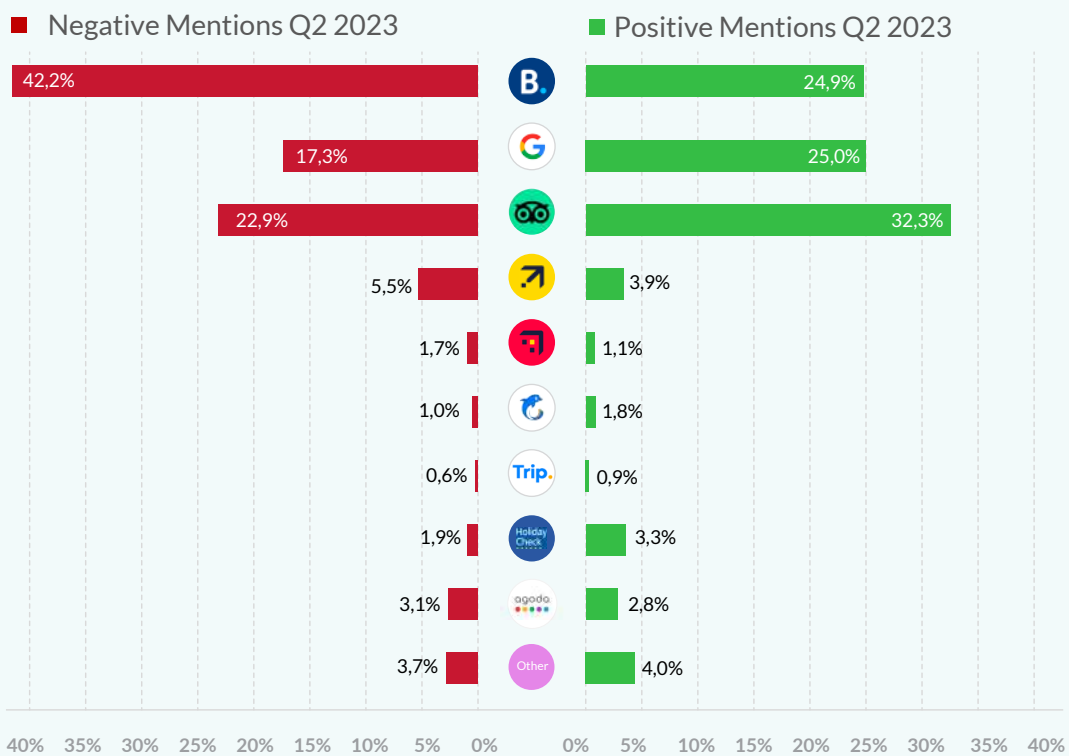
SOURCE



Global: Semantic Analysis

Global Semantic Analysis by Source

Percentage of positive and negative mentions extracted from guest reviews from Q2 2023 per guest review source.



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.

SOURCE



Global: Semantic Analysis

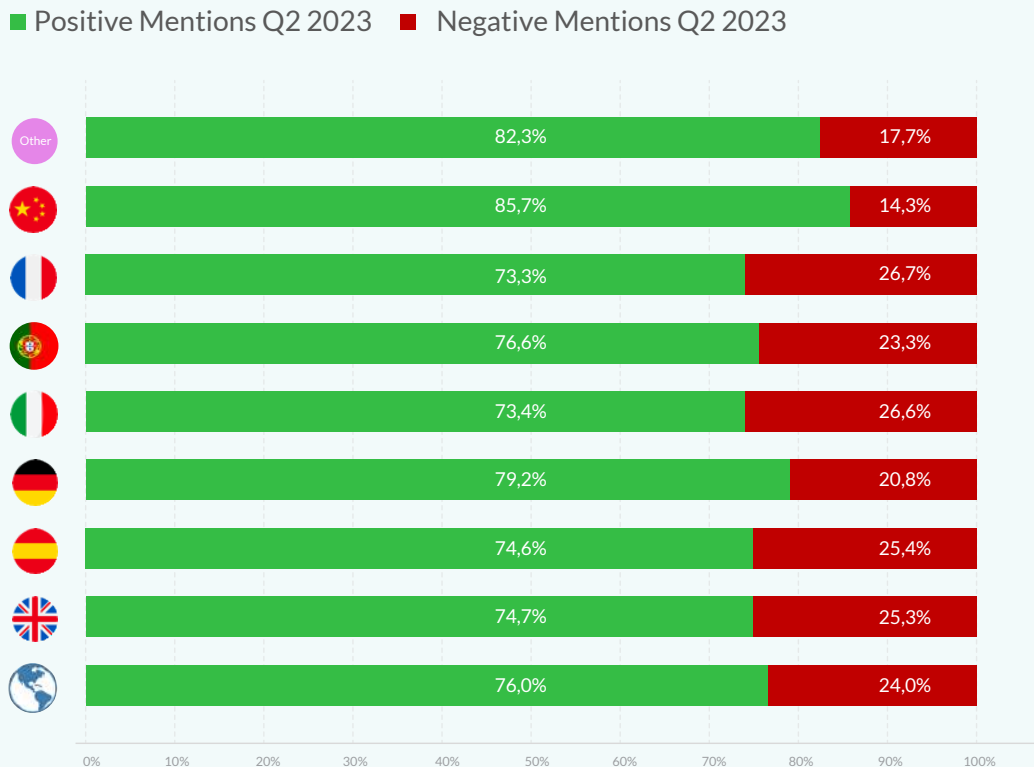
The report analysed reviews in 65 languages around the world. Of the top seven languages, reviewers posting in Chinese were the most generous in their comments, with 85.7% of review mentions classified as positive in Q2 2023. This was followed by reviews written in German (79.2% positive) and Portuguese (76.7% positive). Notably, the proportion of positive

mentions in Portuguese language reviews grew by almost 10% from Q2 2022 to Q2 2023.

It seems that travellers from Italy and French-speaking countries are harder to please. Reviews written in French had the highest proportion of negative reviews (26.7%), closely followed by reviews in Italian (26.6%).

Global: Semantic Analysis by Language

Percentage of positive and negative mentions extracted from guest reviews from Q2 2023 per language.



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.

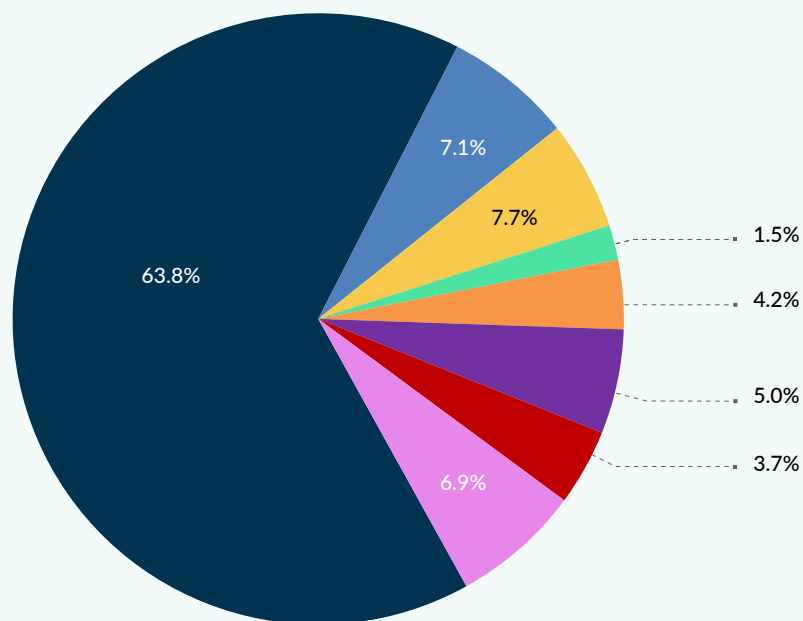
SOURCE



Global Semantic Analysis

Global: Total Semantic Mentions by Language

Percentage of semantic mentions extracted from guest reviews from Q2 2023 per language.



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.

SOURCE



Want to know more about your online reputation?

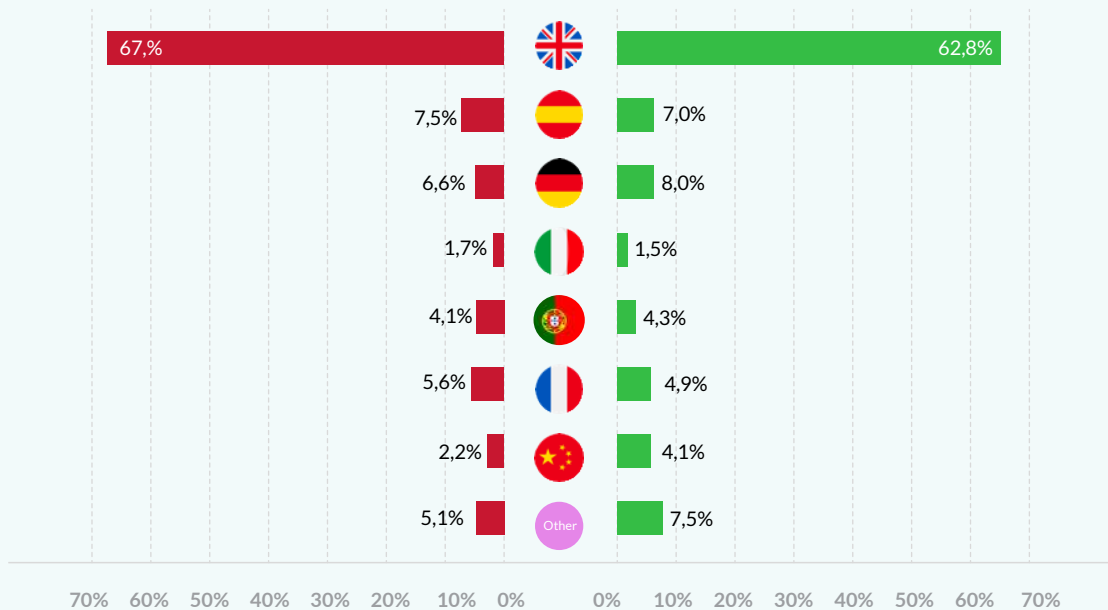
TALK TO US

Global Semantic Analysis

Global: Total Mentions by Language

Percentage of total semantic mentions from online guest reviews in Q2 2023, by language.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

SOURCE



Global: Top 5 Categories Affecting GRI

Within the global data set, the Room category had the highest negative impact on the Global Review Index, driving it down by 1.8 points. The Cleanliness category had the second-highest negative impact, driving down the GRI by 1.2 points. The Experience category had the highest positive impact on the GRI, boosting it by 0.8 points, followed by Staff, at +0.6 points.

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 Q2 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.8	ROOM	-1.8
STAFF	0.6	CLEANLINESS	-1.2
SERVICE	0.4	ESTABLISHMENT	-1.1
FOOD & DRINKS	0.4	FOOD & DRINKS	-1.1
CLEANLINESS	0.3	VALUE	-0.9

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



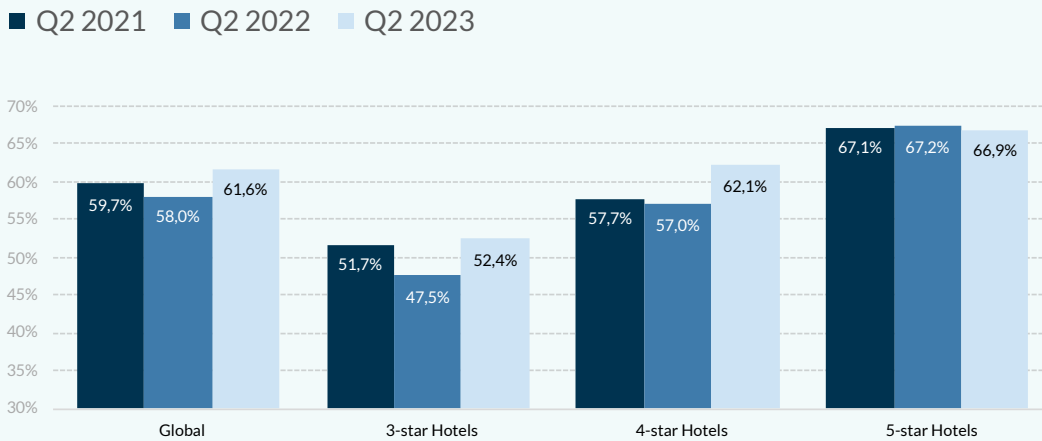
Global Management Responses

Hotels responded to 61.6% of responsible reviews in the second quarter of 2023, an increase of 3.6 points over the same quarter the previous year. In a consistent pattern across segments, 5-star hotels responded to the highest proportion of reviews (66.9%), followed by 4-star hotels (62.1%) and 3-star hotels (52.4%). However, 3-star and 4-star hotels substantially upped their game this quarter, both having increased response volume by about 5.0 points.

Hoteliers responded to a higher proportion of positive reviews (63.5%) than negative reviews (53.7%). On average, they took 3.6 days to respond to positive reviews and 4.3 days to respond to negative reviews. Of the top review sources, Ctrip (82.6%) and Tripadvisor (79.5%) received the highest response rates, whereas Google (56.1%) and Booking.com (56.6%) received the lowest response rates.

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.



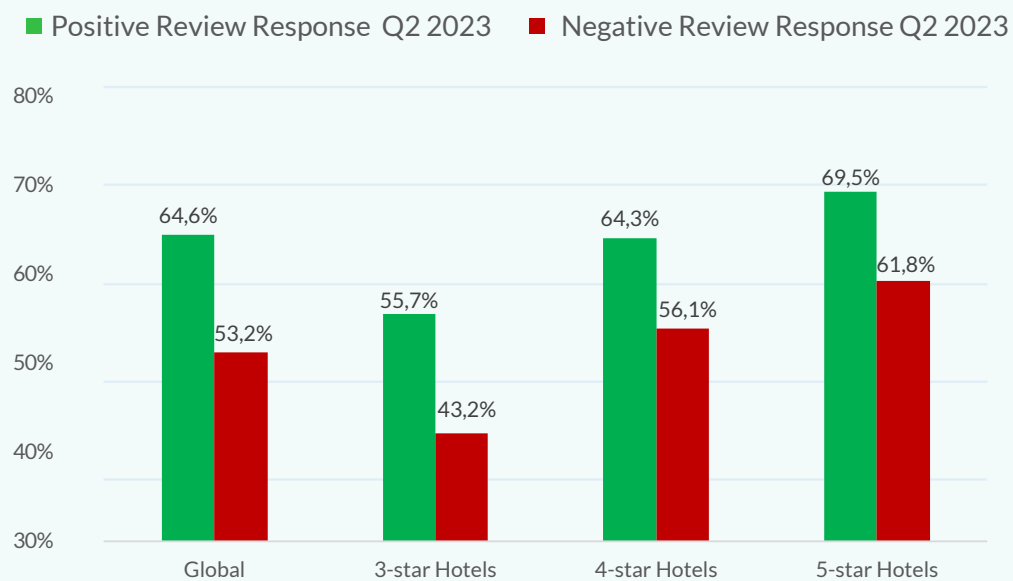
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE


Global Management Responses

Global: Percentage of Positive and Negative Review Response, per Star Category

The percentage of negative and positive online guest reviews being replied to by global hoteliers in Q2 2023, by star category.



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.

SOURCE

Shiji | REVIEWPRO

Want to know more about your online reputation?

TALK TO US

Global Management Responses

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 Q2 2023, by 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.

SOURCE



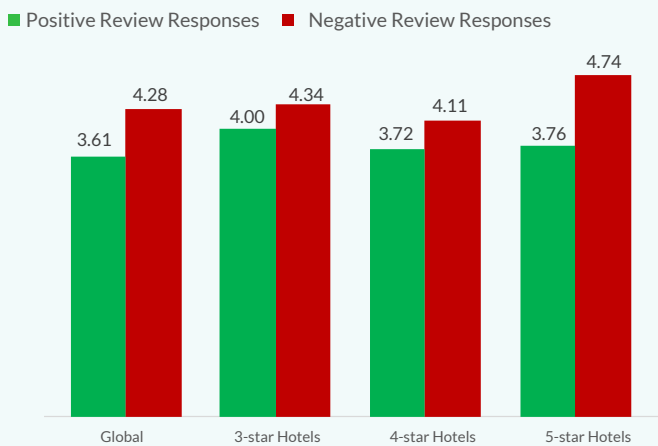
Want to know more about your online reputation?

TALK TO US

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 Q2 2023.

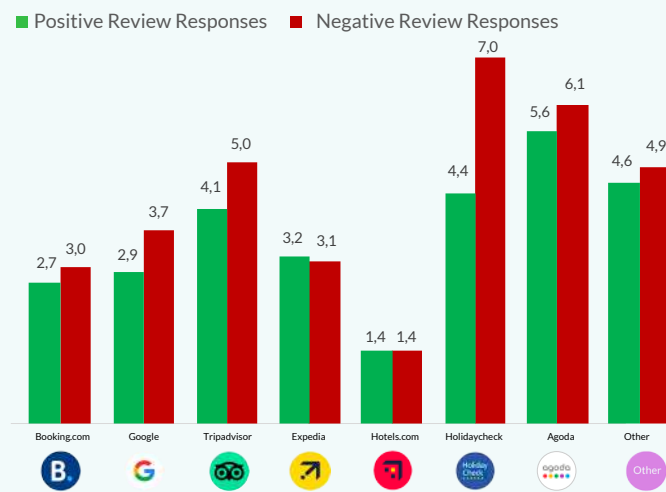


Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

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 Q2 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.

SOURCE
Shiji | REVIEWPRO



Guest Experience Benchmark

CHAPTER

04

REGIONAL DATA

Key Review Performance Metrics by Region

Upon comparing review data across regions, we were once again struck by the consistency in average ratings. In the second quarter of 2023, the spread in the Global Review Index across the six regions, from the top performer to the bottom performer, was just 3.8 points.

The Global Review Index was relatively consistent across regions

Asia Pacific earned the highest GRI at 87.2%

Middle East earned the lowest GRI at 83.4%

Review volume grew by 70.6% in Asia Pacific relative to Q2 2022

Growth in review volume was stagnant in Europe and North America

All regions showed an increase in the GRI from Q2 2022 to Q2 2023. Consistent with previous quarters, the Asia Pacific region achieved the highest GRI, at 87.2%, an increase of 1.2 points over Q2 2022. Next came the Latin America & Caribbean region, at 86.1%, an increase of 0.5 points.

Hotels in the Middle East had the lowest review score, at 83.4%, although this was an improvement of 2.1 points. At 84.4%, North America had the second lowest GRI, yet it increased by 1.4 points over Q2 2022.

As for review volume, large variances across regions reflect the differences in the pace of recovery from the pandemic. In Asia Pacific, the last region to open its borders to travellers, a bounce-back in travel propelled review volume to increase by 70.6% in Q2 2023. Meanwhile, review volume was relatively flat in Europe and North America, where occupancy levels had already almost fully recovered by 2022.

Want to know more about your
online reputation?

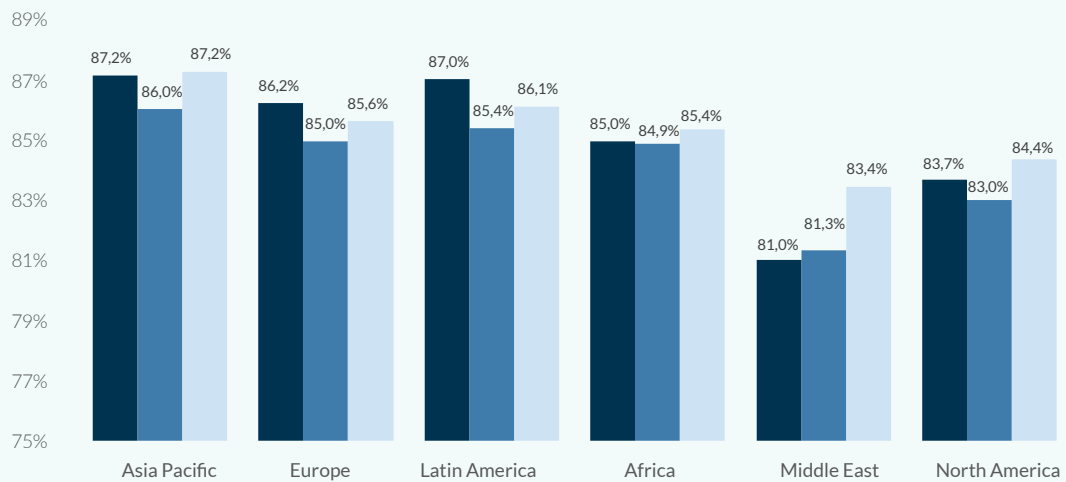
TALK TO US

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.

■ Q2 2021 ■ Q2 2022 ■ Q2 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 Online Travel Agencies (OTAs) and review sites in over 45 languages.

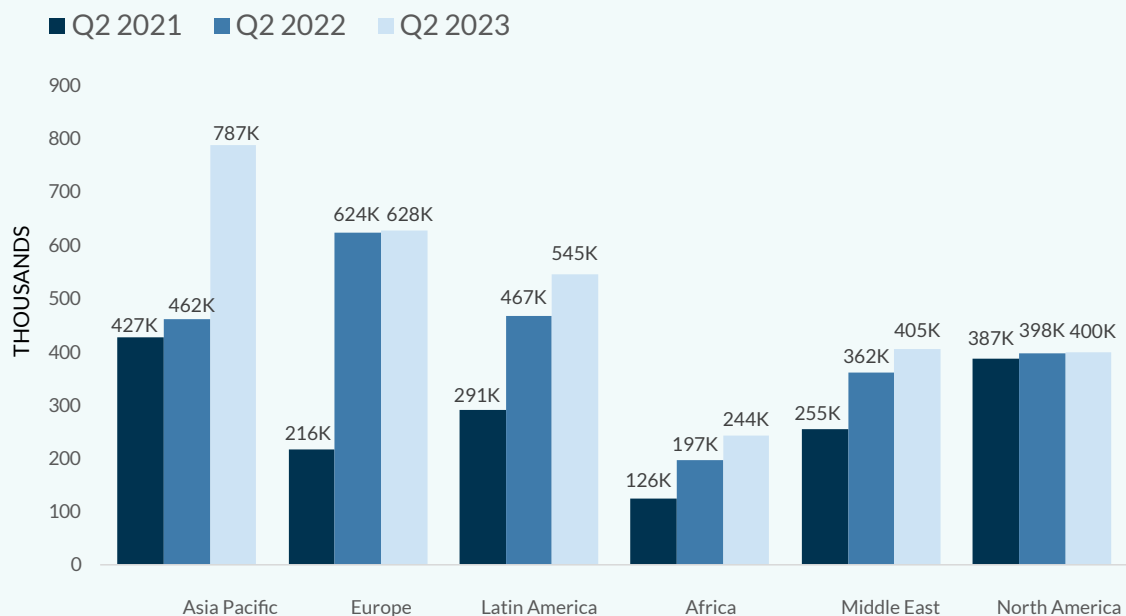
SOURCE



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.

SOURCE

Shiji | REVIEWPRO

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.

Shiji



shijigroup.com



Guest Experience Benchmark

CHAPTER

05

CITY

BENCHMARK

City Benchmark

New in this report, the City Benchmark provides Global Review Index scores for 50 select cities around the world. The cities are displayed in alphabetical order and intended as a benchmark for hotels located in the region, rather than for comparison or ranking. For more information, see the Methodology section near the end of the report.

City Benchmark Combined Results

	City	Q1+Q2 2023 GRI™
1	ABU DHABI	85.80%
2	AMSTERDAM	85.70%
3	ATHENS	82.70%
4	BANGKOK	81.60%
5	BARCELONA	84.20%
6	BEIJING	91.80%
7	BERLIN	80.00%
8	BOGOTA	85.00%
9	BUENOS AIRES	82.10%
10	CAIRO	79.70%
11	CAPE TOWN	86.70%
12	CASABLANCA	78.30%
13	CHICAGO	83.60%
14	COPENHAGEN	83.20%
15	DUBAI	84.40%
16	DUBLIN	85.80%
17	EDINBURGH	86.20%
18	FLORENCE	86.00%
19	HELSINKI	84.50%
20	HONG KONG	81.90%
21	HONOLULU	82.60%
22	ISTANBUL	80.50%
23	LAS VEGAS	79.20%
24	LIMA	87.20%
25	LISBON	89.50%

City Benchmark Combined Results

	City	Q1+Q2 2023 GRI™
26	LONDON	78.70%
27	LOS ANGELES	77.00%
28	MADRID	85.20%
29	MARRAKECH	85.10%
30	MIAMI	77.50%
31	MILAN	81.20%
32	MONTREAL	82.40%
33	MUNICH	82.20%
34	NEW YORK	80.40%
35	PARIS	84.60%
36	PRAGUE	84.80%
37	RIO DE JANEIRO	89.20%
38	RIYADH	77.50%
39	ROME	81.70%
40	SAN FRANCISCO	79.70%
41	SAO PAULO	83.00%
42	SINGAPORE	81.70%
43	STOCKHOLM	82.20%
44	SYDNEY	81.20%
45	TOKYO	83.20%
46	TORONTO	82.60%
47	VANCOUVER	84.80%
48	VENICE	85.90%
49	VIENNA	84.20%
50	ZURICH	83.30%



Guest Experience Benchmark

CHAPTER

06

ASIA PACIFIC

Asia Pacific: Market Overview

The Asia Pacific region experienced a strong rebound in travel volume in the first half of 2023, although the pace of recovery varied by country. Full recovery hinges on China, the largest source of outbound travellers in the region before the pandemic. Hopes were high after China reopened its borders at the end of 2022. However, the country's economy has stumbled since then, and while domestic travel has been strong, international travel has been slower to rebound.¹

Recovery of travel in Asia Pacific was slower than anticipated

Asia Pacific earned the highest review score of 87.2%

Review volume grew by 70.6%

Booking.com lost 11.1 points in review market share; picked up by regional OTAs

Hotels responded to 61.1% of reviews, an increase of 3.8 points

Review volume in the Asia Pacific region grew by 70.6% in the second quarter, falling just 4.5% short of pre-pandemic Q2 2019 volume. Hotels also increased the region's Global Review Index by 1.2 points to 87.2%, the highest GRI of the six regions. Five-star hotels showed the biggest growth, pushing up the GRI by 1.5 points to 90.6% – the only segment in any region to exceed 90%.

With 24.3% of review market share, Booking.com lost 11.1 points in Q2 2023 relative to Q2 2022. Most of this share was picked up by regional OTAs, including Ctrip (9.4% share), Agoda (9.4% share), and Trip.com (7.3%). Meanwhile, Google held on to its market share, generating 31.5% of total reviews in the region – a higher proportion than in any other region.

At 81.3%, Booking.com had the lowest Source Index in the region, whereas Ctrip had the highest Source Index, at 89.7%.

Hotels in Asia Pacific responded to 61.1% of responsible reviews in Q2 2023, an increase of 3.8 points relative to Q2 2022. Sixty-three percent of positive reviews received a response, whereas 50.5% of negative reviews received a response. Hotels took 5.0 days on average to respond to positive reviews and 5.7 days to respond to negative reviews.

Want to know more about your online reputation?

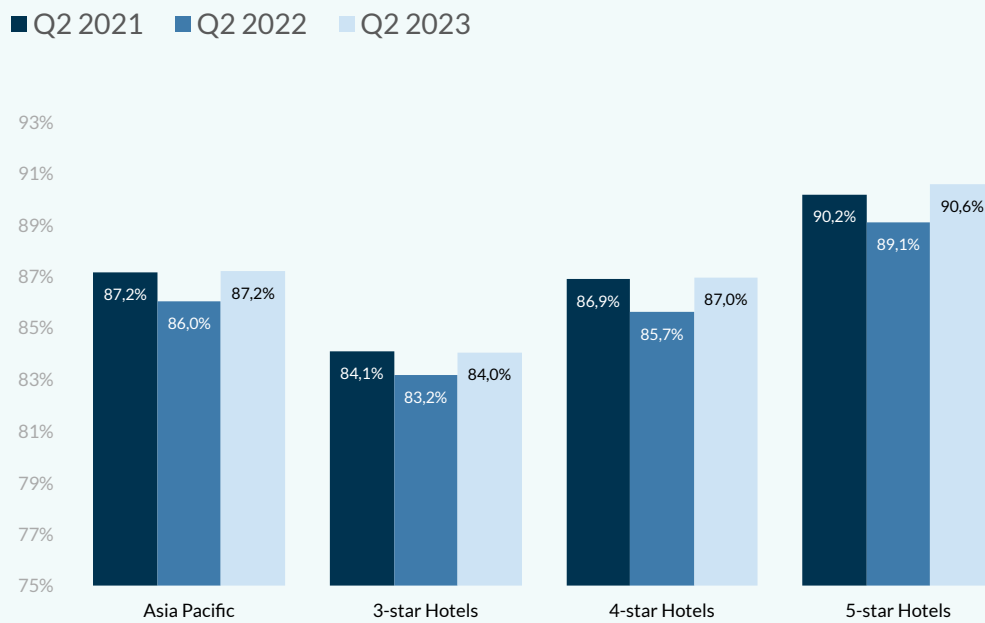
TALK TO US

¹ CNBC. What happened to the Chinese travel boom everyone was waiting for? It stayed in China. July 2023.

Asia Pacific: GRI Metrics

Asia: Global Review Index™ (GRI)

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



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.

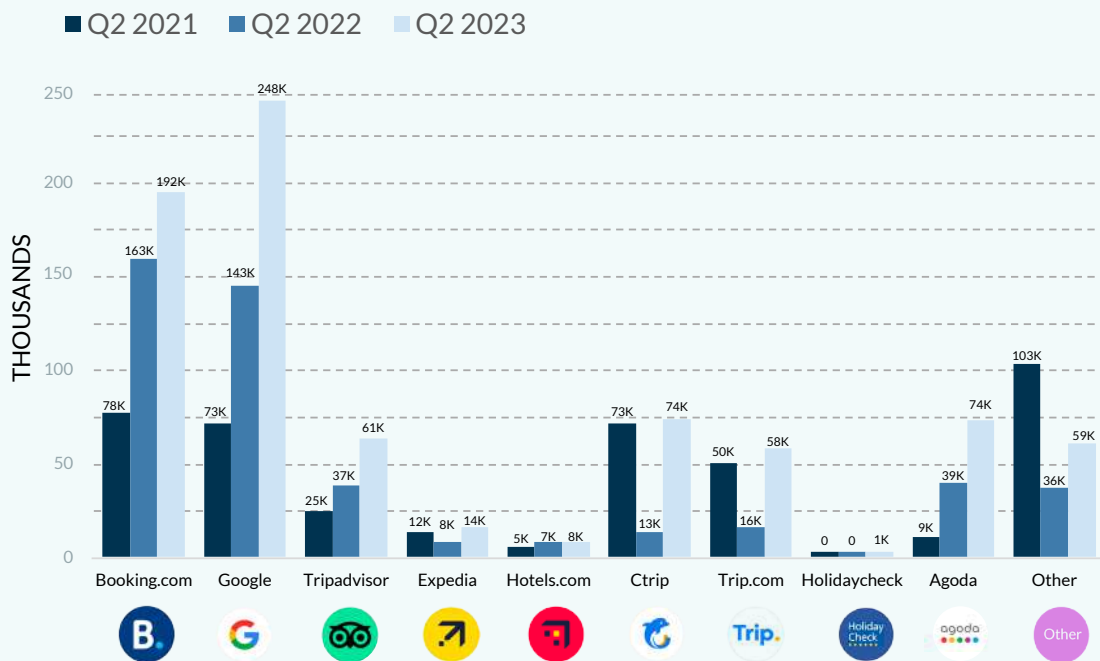
SOURCE



Asia Pacific: Review Volume

Asia: Review Volume per Source

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



The Review volume collects reviews from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.

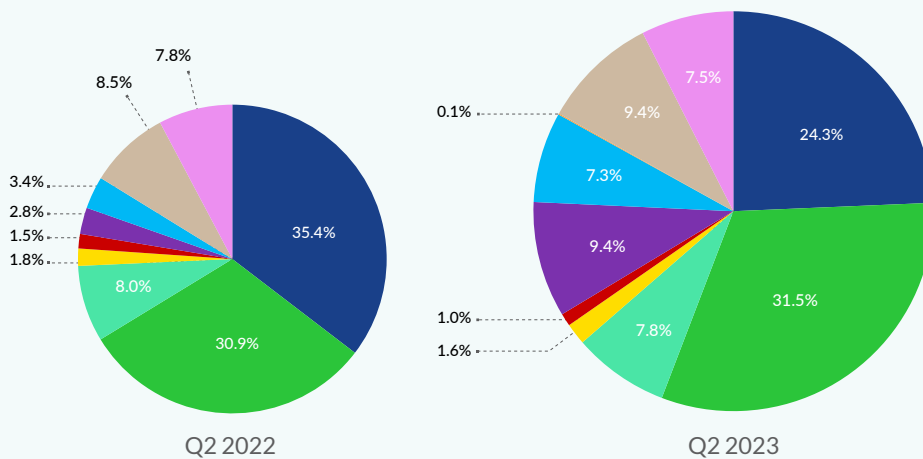
SOURCE



Asia Pacific: Share of Reviews Per Source

Asia Pacific: Share of Reviews 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.

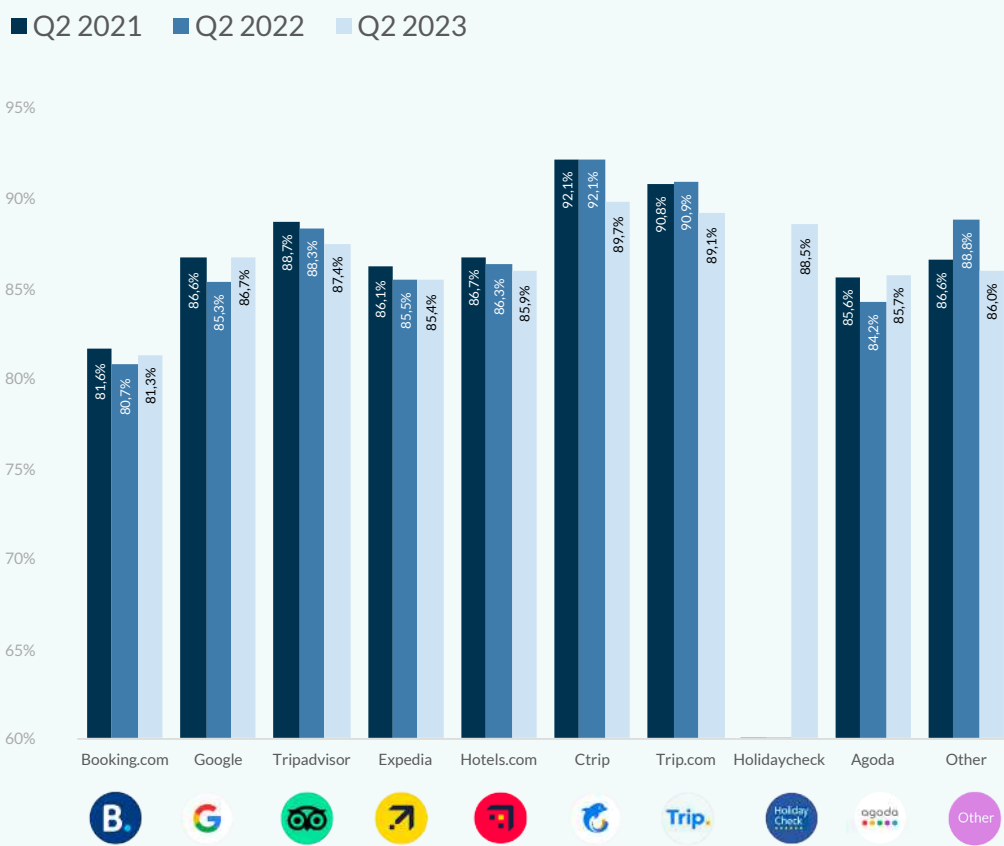
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	35.4%	30.9%	8.0%	1.8%	1.5%	2.8%	3.4%	0.0%	8.5%	7.8%
2023	24.3%	31.5%	7.8%	1.6%	1.0%	9.4%	7.3%	0.1%	9.4%	7.5%
Change Q2 2023 vs Q2 22	-11.1	0.6	-0.2	-0.1	-0.5	6.6	3.9	0.1	0.9	-0.3

Asia Pacific: Review Source Indexes

Asia: Review Source Indexes

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



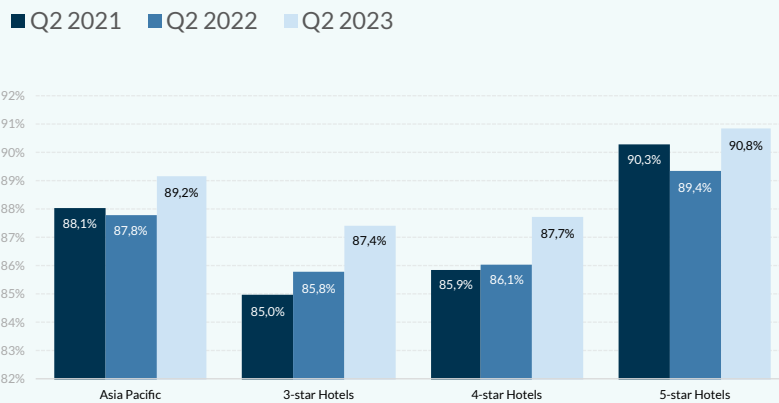
A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm, derived from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

Asia Pacific: Department Indexes

Asia Pacific: Service

Individual department index scores, a three-year comparison.



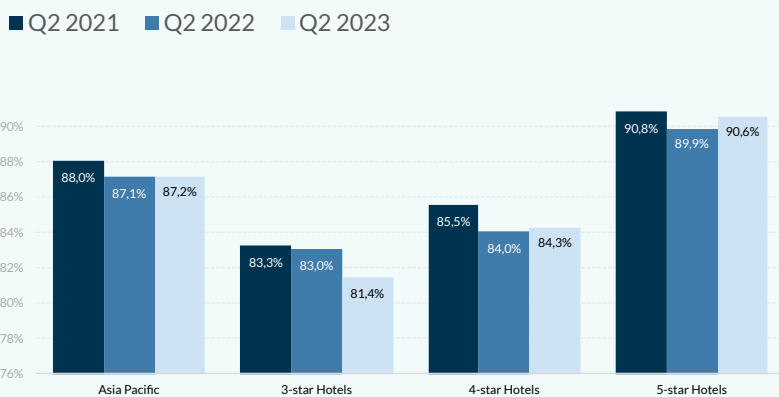
A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



Asia Pacific: Room

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

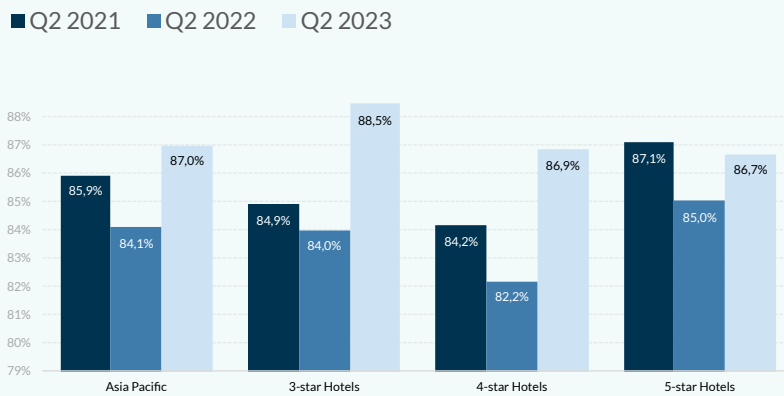
SOURCE



Asia Pacific: Department Indexes

Asia Pacific: Value

Individual department index scores, a three-year comparison.

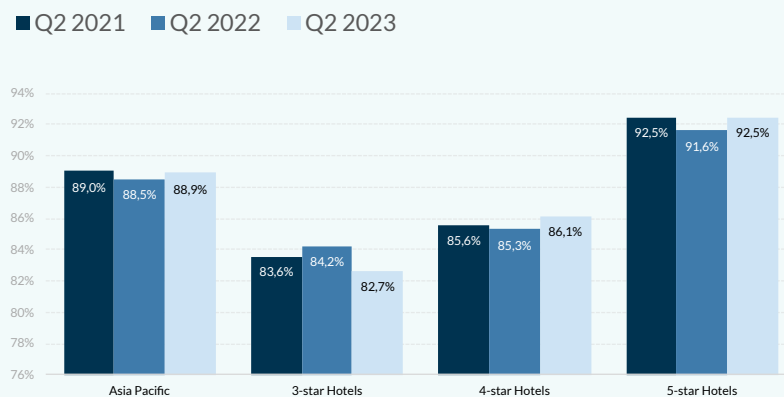


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji REVIEWPRO

Asia Pacific: Cleanliness

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

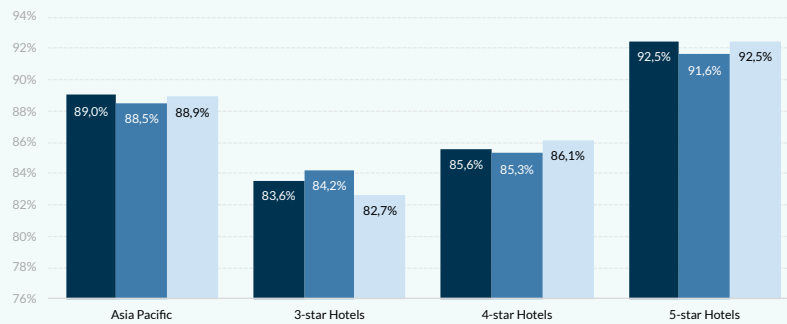
SOURCE
Shiji REVIEWPRO

Asia Pacific: Department Indexes

Asia Pacific: Cleanliness

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE

Shiji | REVIEWPRO

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 Q2 2023.

CATEGORY		POSITIVE	CATEGORY		NEGATIVE
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		0.3	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.

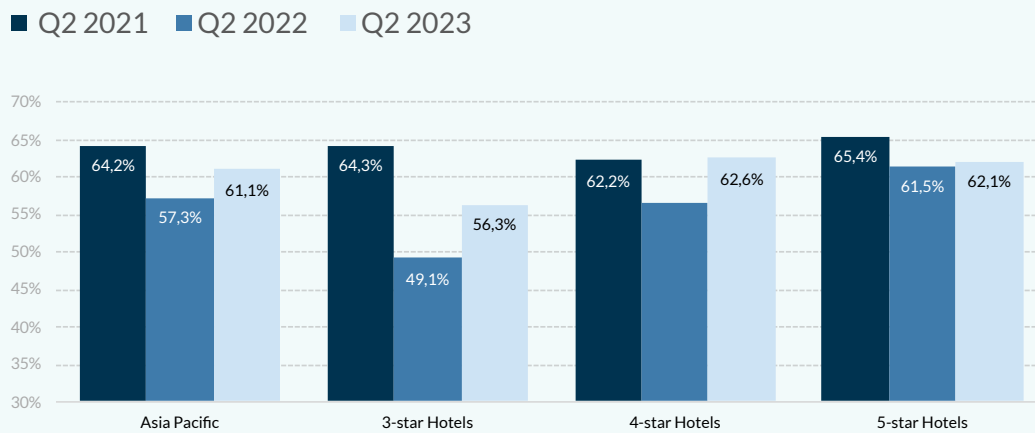
SOURCE


 Shiji | REVIEWPRO

Asia Pacific: Management Responses

Asia: 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.

SOURCE

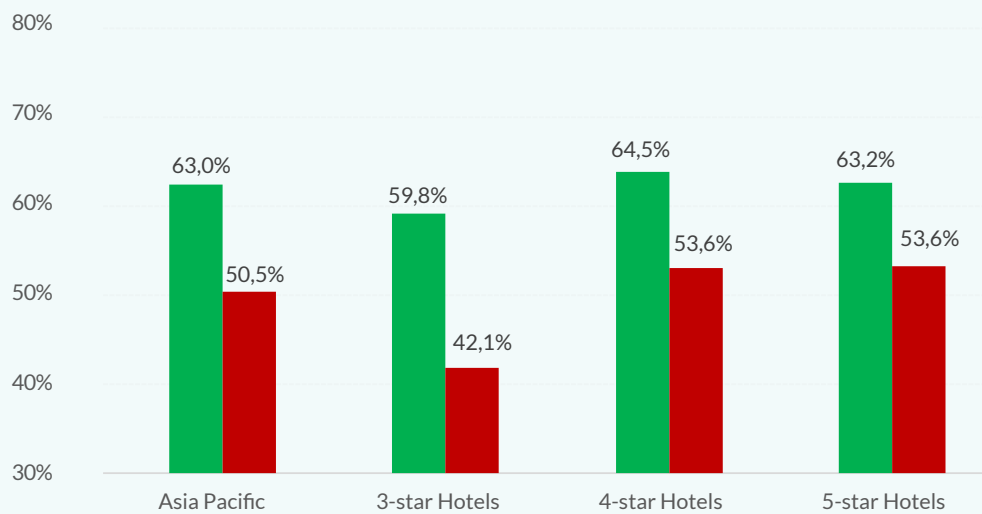


Asia Pacific: Management Responses

Percentage of Positive and Negative Review Response, per Star Category

The percentage of negative and positive online guest reviews being replied to by hoteliers in Q2 2023.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

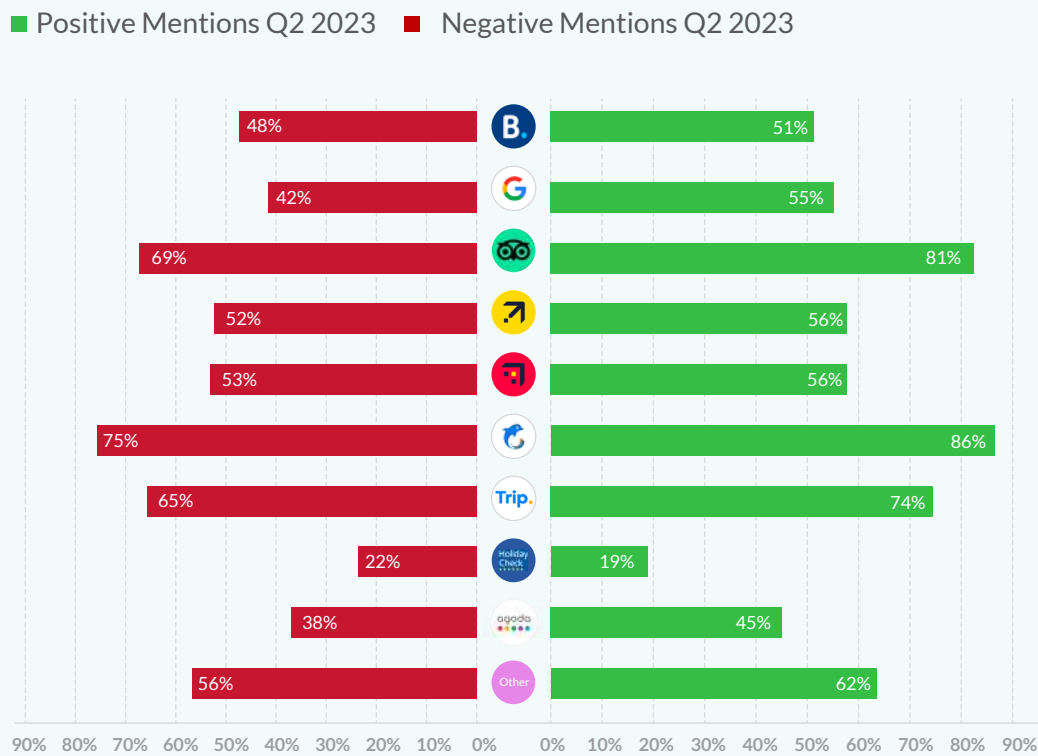
SOURCE

Shiji | REVIEWPRO

Asia Pacific: Management Responses

Percentage of Positive and Negative Review Response, per Review Source

The percentage of negative and positive online guest reviews being replied to by hoteliers, per review source, in Q2 2023.



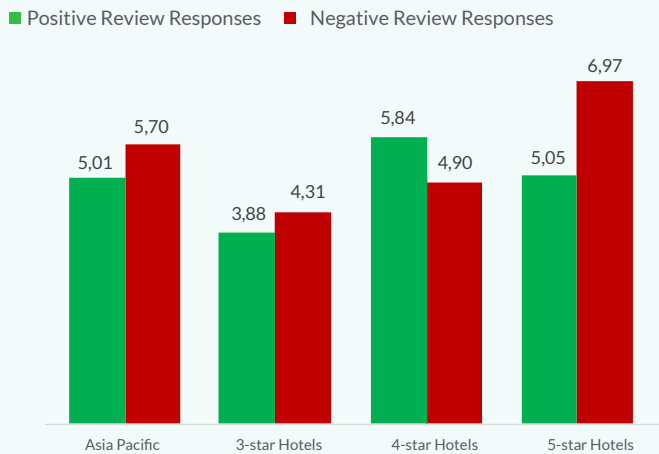
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Asia Pacific: Management Responses

Review Response Times per Star Rating

The number of days it took hotels to respond to positive and negative responsible online guest reviews per star rating in Q2 2023.

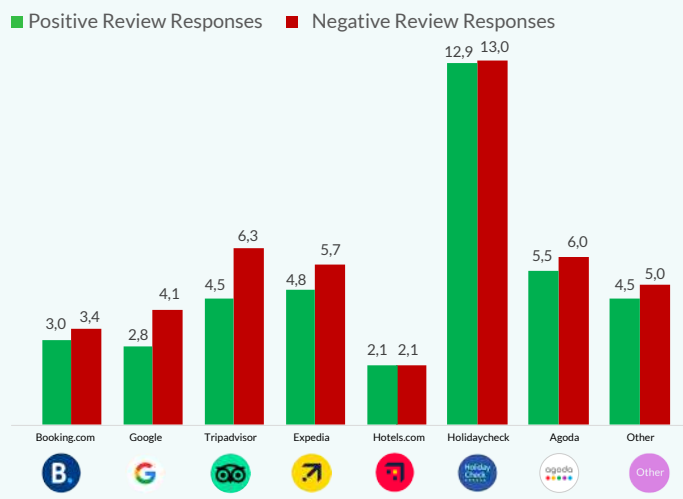


Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Review Response Times per Review Source

The number of days it took hotels to respond to positive and negative responsible online guest reviews per review source in Q2 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.

SOURCE
Shiji | REVIEWPRO

Asia Pacific: City Benchmark

Here we have selected six 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

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	BANGKOK	78.40%	-0.9	71.20%	3.3
2	BEIJING	91.30%	-0.9	84.90%	-5.9
3	HONG KONG	75.50%	3.1	64.60%	-1.2
4	SINGAPORE	74.60%	1.0	65.30%	5.9
5	SYDNEY	75.50%	1.0	59.50%	1.9
6	TOKYO	80.50%	0.5	72.90%	-1.2

4-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	BANGKOK	83.30%	-0.2	74.40%	1.2
2	BEIJING	91.20%	-0.3	83.50%	-3.5
3	HONG KONG	81.50%	2.3	71.30%	-2.6
4	SINGAPORE	83.70%	0.5	72.60%	5.5
5	SYDNEY	81.20%	0.7	66.10%	1.7
6	TOKYO	85.60%	0.1	75.10%	-5.0

Asia Pacific: City Benchmark

5-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	BANGKOK	83.30%	-0.2	74.40%	1.2
2	BEIJING	91.20%	-0.3	83.50%	-3.5
3	HONG KONG	81.50%	2.3	71.30%	-2.6
4	SINGAPORE	83.70%	0.5	72.60%	5.5
5	SYDNEY	81.20%	0.7	66.10%	1.7
6	TOKYO	85.60%	0.1	75.10%	-5.0

Asia Pacific: Sydney City Hotel Ranking

New in this report, the City Hotel Rankings provide the Global Review Index scores for top-ranking hotels and serviced apartments in key cities around the world. The hotels are ranked by performance, and divided into 3-, 4-, and 5-star ratings for increased granularity. For more information, see the Methodology section near the end of the report.

Our congratulations go out to all who made the shortlists. The results are a testament to the continued hard work of thousands of hotels and millions of staff creating great guest experiences day after day.

3-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Mary MacKillop Place	89.4%	258
2	Alexander the Great Motel	88.5%	101
3	Sydney Boutique Hotel	87.9%	308
4	Sydney Harbour YHA	87.7%	1452
5	Royal Hotel Randwick	85.8%	374
6	Avoca Lodge	85.7%	145
7	The Clovelly Hotel	84.6%	277
8	ValueSuites Green Square	84.4%	747
9	Little Coogee Hotel	84.1%	340
10	Hotel Bondi	83.6%	496
11	Narwee Hotel	83.3%	250
12	Mt. Kuring-Gai Motel	82.6%	126
13	Perouse Lodge	82.2%	259
14	Kith Hotel Darling Harbour	81.7%	451
15	Southend Hotel	81.5%	205
16	Hotel 59	81.3%	107
17	Song Hotel Sydney	81.2%	849
18	Coogee Bay Hotel	81.1%	287
19	Glenferrie Lodge	80.5%	372
20	Nepean by Gateway Lifestyle Holiday Parks	80.1%	313

4-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Wildlife Retreat At Taronga	94.6%	582
2	Medusa Hotel	93.7%	166
3	Adina Apartment Hotel Sydney Chippendale	92.4%	272
4	Mrs Banks Hotel	90.9%	202
5	Best Western Casula Motor Inn	90.7%	156
6	The General Gordon	90.6%	226
7	Camden Valley Inn	90.3%	644
8	Quest North Sydney	90.2%	442
9	The Grace Hotel	89.9%	2965
10	Mercure Sydney Liverpool	89.8%	640
11	A by Adina Sydney	89.2%	1156
12	The Albert Hotel Mosman	89.2%	231
13	Aiden By Best Western @ Darling Harbour	89.0%	595
14	Crowne Plaza Sydney Darling Harbour	88.7%	353
15	Avonmore on the Park Boutique Hotel	88.6%	233
16	Adina Apartment Hotel Sydney Airport	88.1%	1123
17	Coogee Sands Hotel & Apartments	87.8%	607
18	YEHS Hotel - Sydney QVB	87.7%	1389
19	Holiday Inn Sydney St Marys	87.7%	215
20	YEHS Hotel Sydney CBD	87.6%	1596

5-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Capella Sydney	95.6%	116
2	QT Sydney	94.6%	857
3	The Darling at The Star	93.9%	574
4	Four Seasons Hotel Sydney	92.8%	1886
5	Crystalbrook Albion	92.2%	162
6	Little National Hotel Sydney	92.0%	1339
7	202 Elizabeth	91.9%	148
8	Radisson Blu Plaza Hotel Sydney	91.2%	2127
9	SKYE Suites Sydney	91.0%	672
10	SKYE Suites Green Square	90.7%	644
11	Meriton Suites Coward Street, Mascot	90.6%	1053
12	The Fullerton Hotel Sydney	90.3%	2744
13	Zara Tower – Luxury Suites and Apartments	90.3%	523
14	Sheraton Grand Sydney Hyde Park	89.4%	1231
15	Meriton Suites North Sydney	89.1%	733
16	Meriton Suites North Ryde	89.0%	741
17	Pier One Sydney Harbour, Autograph Collection	88.8%	673
18	Park Hyatt Sydney	88.8%	396
19	Meriton Suites Sussex Street Sydney	88.4%	2202
20	Sofitel Sydney Darling Harbour	88.4%	1462



Guest Experience Benchmark

CHAPTER

07

EUROPE

Europe: Market Overview

The war in Ukraine continues to take a toll on the European travel industry, pushing up food and energy prices and affecting the decisions of 44% of European travellers.¹ However, the uncertainty hasn't held back travellers or hotel rates, which have soared over the past year. And a surge in American travellers has helped to offset soft demand from China.

Travel demand in Europe remained strong despite headwinds

The Global Review Index increased by 0.6 points to 85.6%

Booking.com generated 64.4% of reviews

The Room category drove down the GRI by 2.2 points

In the second quarter of 2023, the Global Review Index for hotels in our European data set was 85.6%, an increase of 0.6 points over the same quarter in 2022 but still 0.6 points below 2021.

After growing at a rapid pace in 2022, review volume increased by only 0.6% in the quarter, a reflection of slower occupancy growth in the region. Booking.com generated a formidable 64.4% of hotel reviews in Europe, a far greater share than in any other region. Google came at a distant second, accounting for 18.0% of reviews, followed by Tripadvisor at 8.8%.

At 83.9%, Booking.com's low Source Index relative to other sources should be of concern to European hoteliers given its majority share of reviews. Only Tripadvisor's Source Index was lower, at 83.5%. By comparison, Google's Source Index was 87.0%.

In semantic analysis of review comments, the Room category had the highest negative impact on the region's Global Review Index, driving it down by 2.2 points. The Experience category had a positive impact of 0.7 points.

Hoteliers in Europe responded to 56.3% of reviews in Q2 2023, an increase of 5.8 points over Q2 2022. Notably, 3-star hotels responded to a much lower proportion of reviews than in other regions, at 42.4%, compared to the global average of 52.4%.

Want to know more about your online reputation?

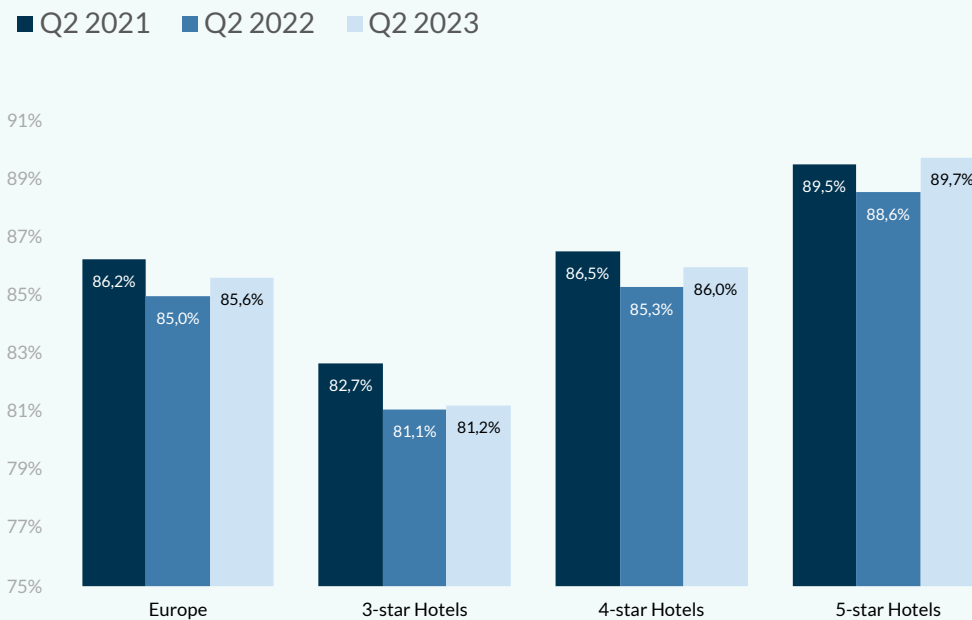
TALK TO US

¹ European Travel Commission. Monitoring Sentiment for Domestic and Intra-European Travel. April 2023.

Europe: GRI Metrics

Europe: Global Review Index™ (GRI)

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



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.

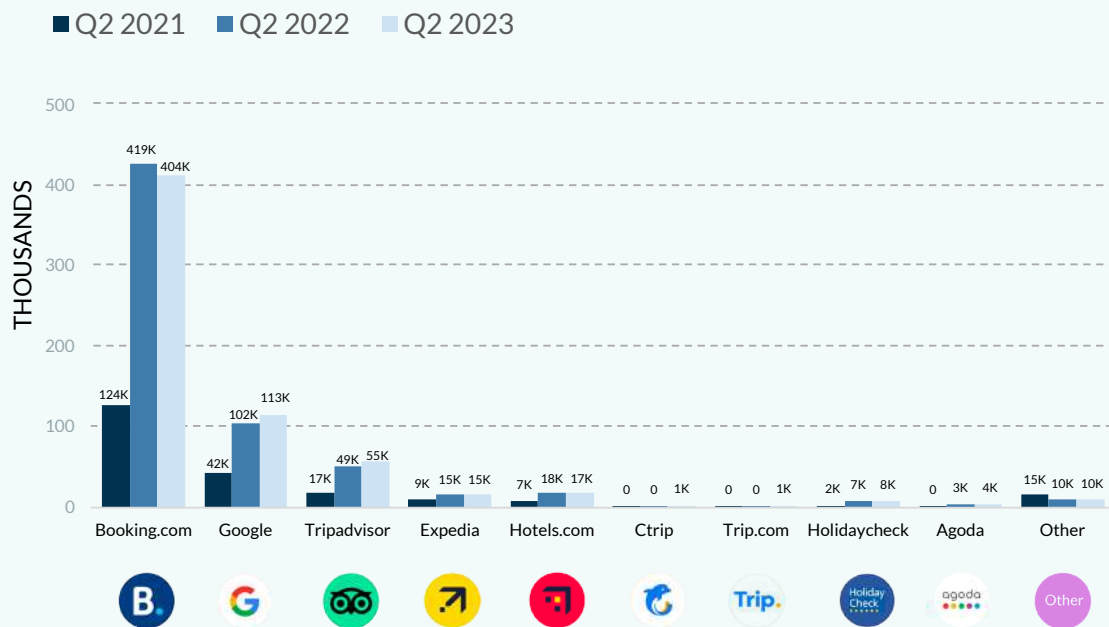
SOURCE



Europe: Review Volume

Europe: Review Volume per Source

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



The Review volume collects reviews from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.

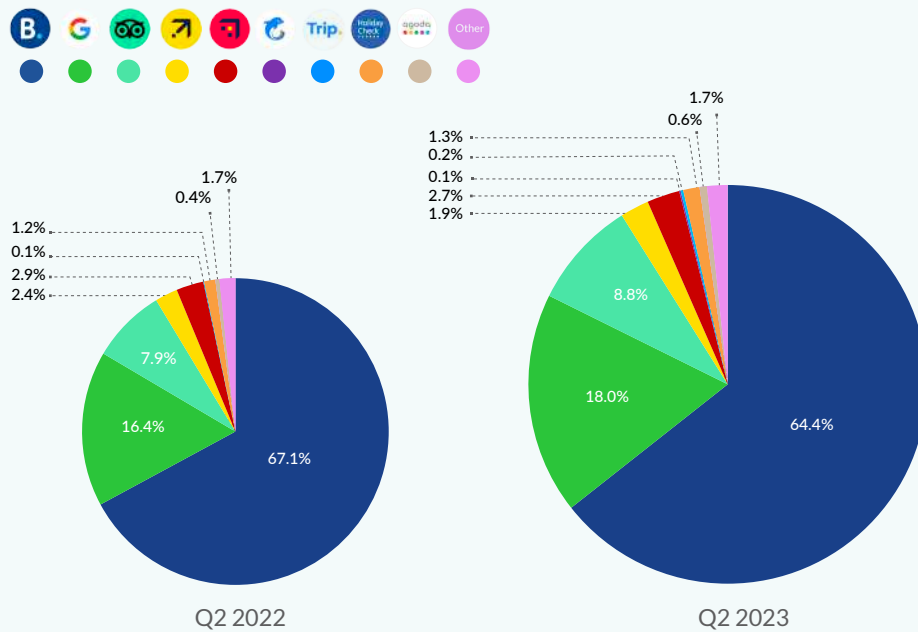
SOURCE



Europe: Share of Reviews Per Source

Europe: Share of Reviews 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.

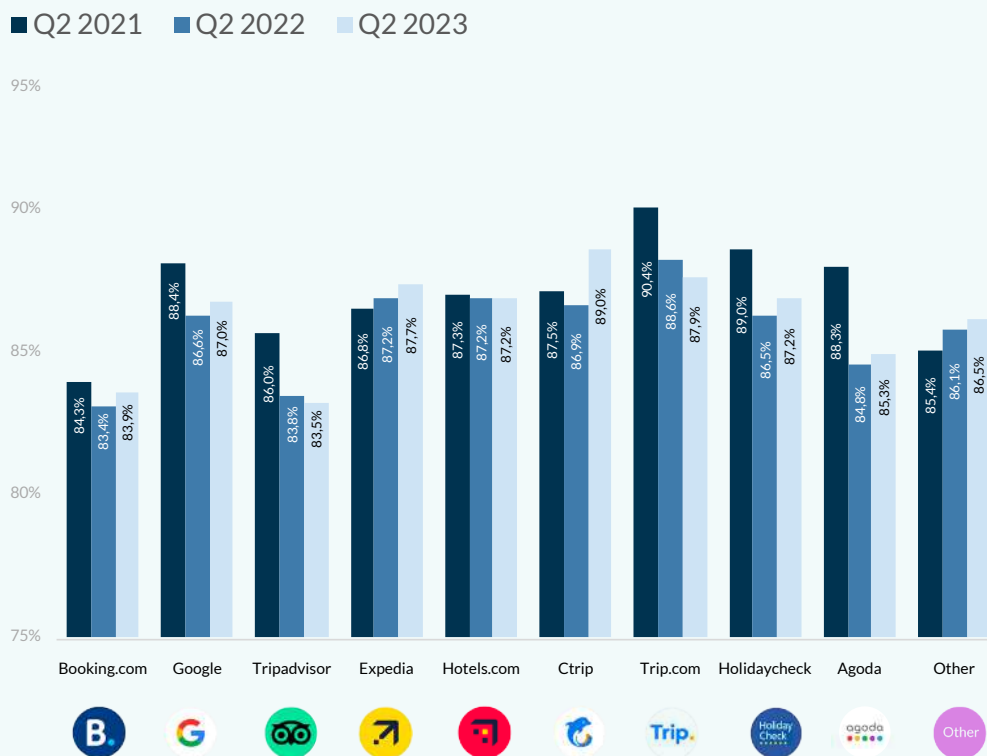
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	67.1%	16.4%	7.9%	2.4%	2.9%	0.0%	0.1%	1.2%	0.4%	1.7%
2023	64.4%	18.0%	8.8%	1.9%	2.7%	0.1%	0.2%	1.3%	0.6%	1.7%
Change Q2 23 vs Q2 22	- 2.7	1.6	0.9	- 0.1	- 0.2	0.1	0.1	0.1	0.2%	0.0

Europe: Review Source Indexes

Europe: Review Source Indexes

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



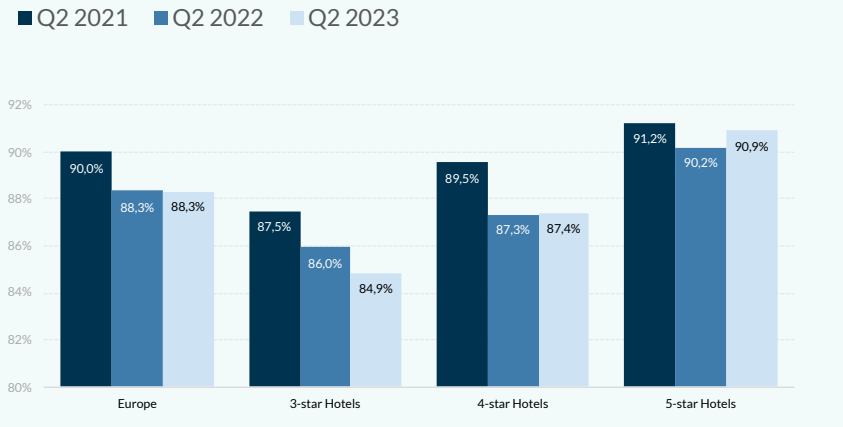
A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm, derived from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

Europe: Department Indexes

Europe: Service

Individual department index scores, a three-year comparison.

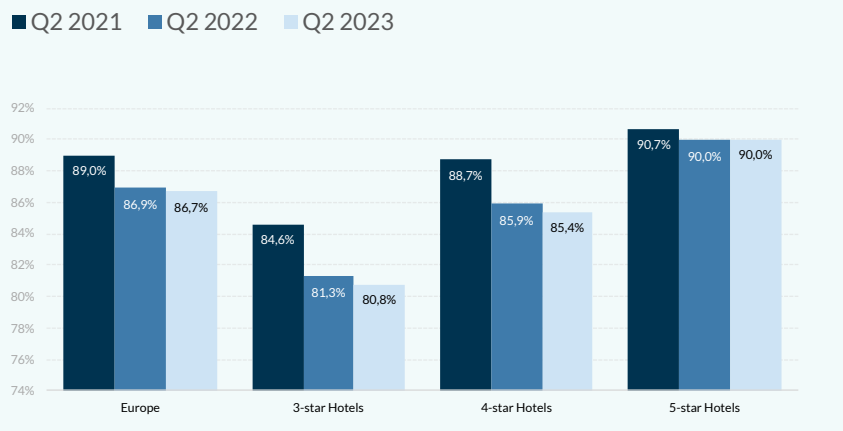


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE


Europe: Room

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

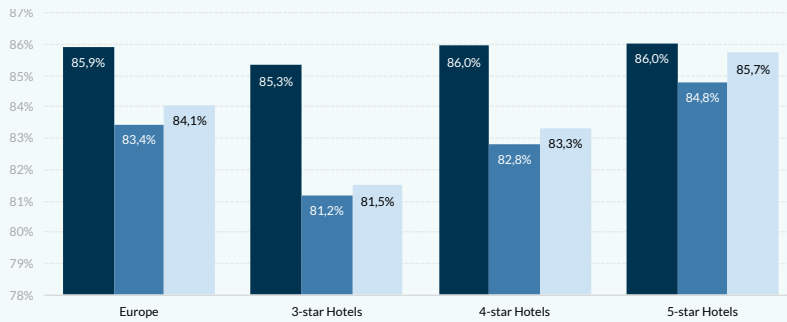
SOURCE


Europe: Department Indexes

Europe: Value

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

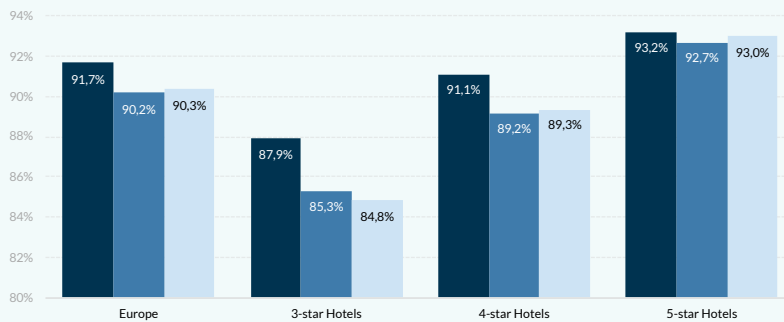
SOURCE



Europe: Cleanliness

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE

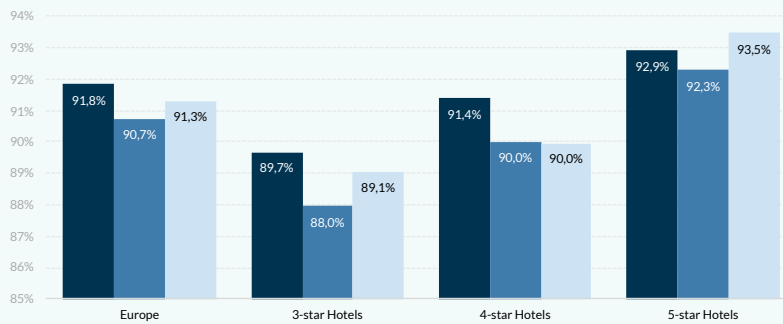


Europe: Department Indexes

Europe: Location

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE

Shiji | REVIEWPRO

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 Q2 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.7	ROOM	-2.2
STAFF	0.7	FOOD & DRINKS	-1.3
ESTABLISHMENT	0.4	ESTABLISHMENT	-1.2
CLEANLINESS	0.3	CLEANLINESS	-1.2
FOOD & DRINKS	0.3	VALUE	-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.

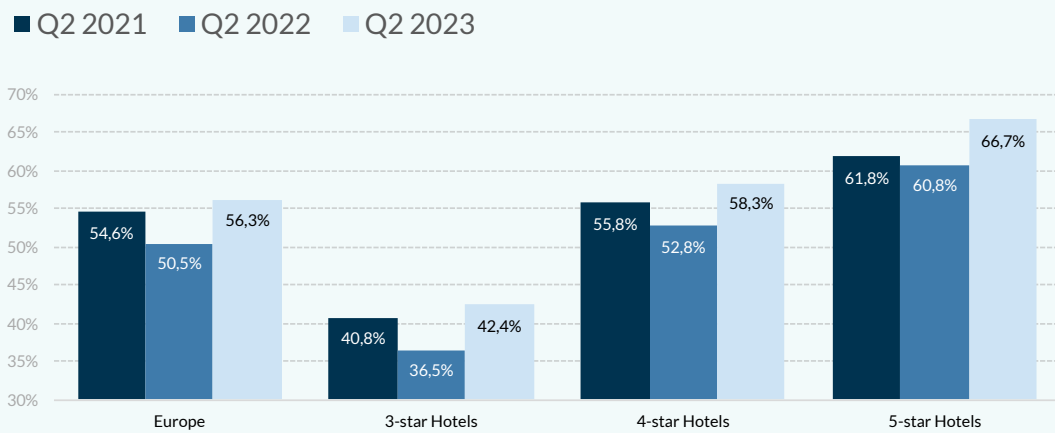
SOURCE

Shiji | REVIEWPRO

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.



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.

SOURCE



Europe: Management Responses

Percentage of Positive and Negative Review Response, per Star Category

The percentage of negative and positive online guest reviews being replied to by hoteliers in Q2 2023.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

SOURCE

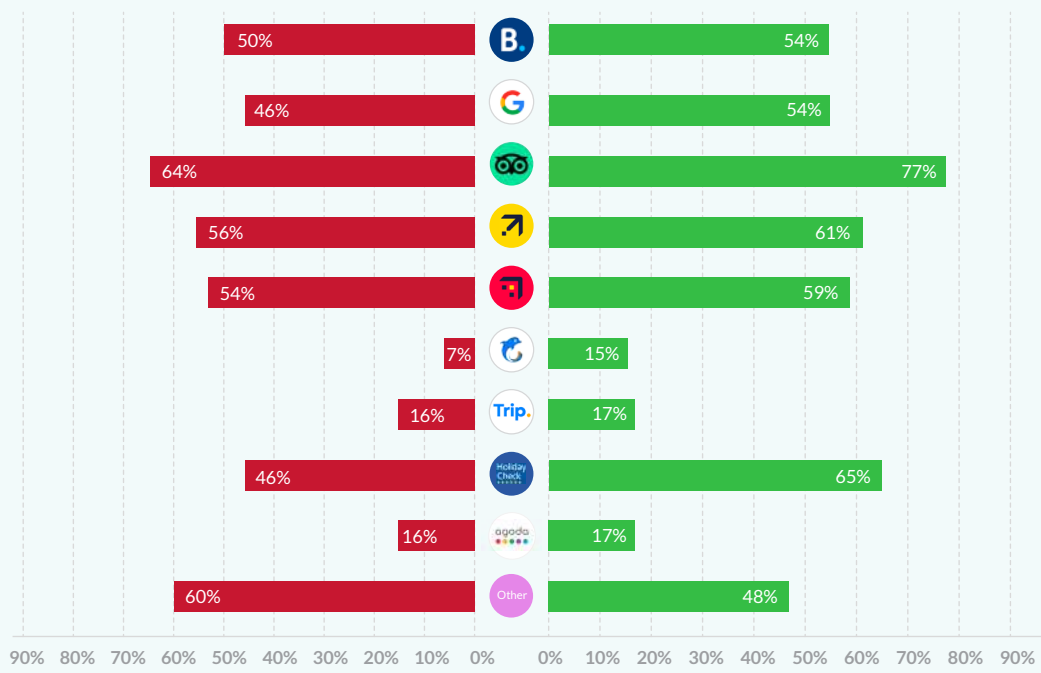


Europe: Management Responses

Percentage of Positive and Negative Review Response, per Review Source

The percentage of negative and positive online guest reviews being replied to by hoteliers, per review source, in Q2 2023.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

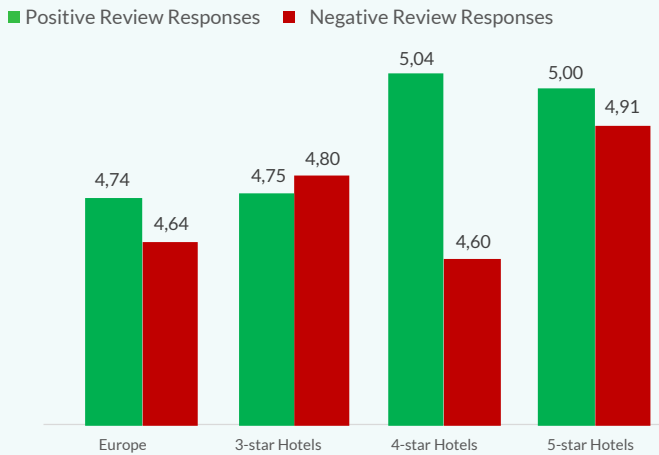
SOURCE



Europe: Management Responses

Review Response Times per Star Rating

The number of days it took hotels to respond to positive and negative responsible online guest reviews per star rating in Q2 2023.

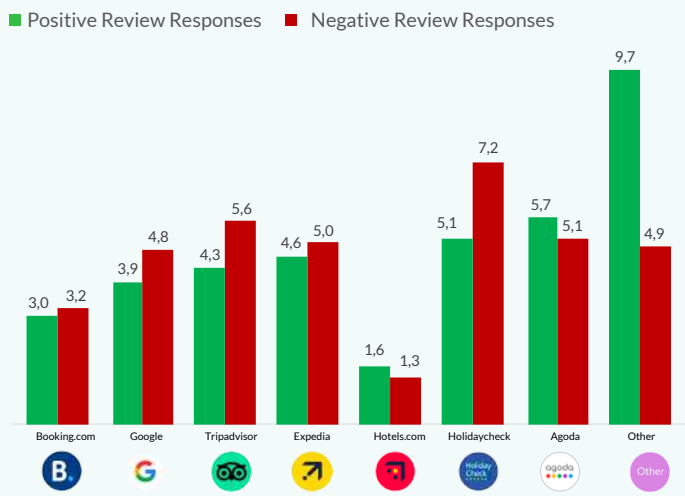


Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Review Response Times per Review Source

The number of days it took hotels to respond to positive and negative responsible online guest reviews per review source in Q2 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.

SOURCE
Shiji | REVIEWPRO

Europe: City Benchmark

Here we have selected 22 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

	City	Q1+Q2 2023 GRI	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	AMSTERDAM	79.40%	-0.2	66.20%	-0.1
2	ATHENS	82.50%	-0.4	73.70%	-0.1
3	BARCELONA	83.50%	0.9	71.60%	1.4
4	BERLIN	78.00%	-0.1	69.30%	0.3
5	COPENHAGEN	81.20%	-0.5	72.20%	0.6
6	DUBLIN	83.10%	1.5	69.20%	2.2
7	EDINBURGH	80.60%	-0.3	65.50%	-1.2
8	FLORENCE	81.50%	-0.2	72.50%	-0.9
9	HELSINKI	80.00%	0.4	72.50%	3.6
10	ISTANBUL	78.40%	0.0	73.60%	1.5
11	LISBON	82.90%	0.4	72.60%	1.2
12	LONDON	75.60%	0.7	64.30%	1.9
13	MADRID	82.30%	0.1	68.70%	0.0
14	MILAN	78.80%	0.2	70.00%	0.6
15	MUNICH	80.70%	0.1	70.40%	0.6
16	PARIS	81.10%	0.0	71.30%	0.1
17	PRAGUE	81.70%	0.2	71.30%	0.9
18	ROME	79.10%	0.0	69.00%	-0.1
19	STOCKHOLM	78.30%	0.8	73.30%	3.2
20	VENICE	83.40%	0.3	71.60%	-0.4
21	VIENNA	81.00%	-1.6	71.50%	-1.8
22	ZURICH	81.90%	-0.1	71.30%	-1.4

Europe: City Benchmark

Here we have selected 22 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

	City	Q1+Q2 2023 GRI	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	AMSTERDAM	83.80%	-0.6	70.80%	0.9
2	ATHENS	87.20%	0.0	75.60%	0.7
3	BARCELONA	85.80%	0.7	72.70%	2.1
4	BERLIN	83.60%	0.6	71.00%	0.5
5	COPENHAGEN	84.40%	0.6	72.40%	2.1
6	DUBLIN	86.00%	1.2	71.80%	4.0
7	EDINBURGH	86.20%	0.4	69.80%	2.8
8	FLORENCE	86.70%	0.5	76.70%	1.5
9	HELSINKI	85.80%	1.1	77.80%	2.8
10	ISTANBUL	82.00%	1.6	76.50%	2.1
11	LISBON	87.00%	0.4	73.80%	1.2
12	LONDON	81.10%	0.8	68.20%	3.8
13	MADRID	87.10%	0.7	73.70%	1.7
14	MILAN	82.70%	-0.2	69.30%	-0.4
15	MUNICH	83.50%	0.6	72.30%	-0.1
16	PARIS	84.90%	0.0	74.50%	0.3
17	PRAGUE	86.10%	0.1	76.20%	2.2
18	ROME	81.60%	-0.6	70.60%	0.1
19	STOCKHOLM	85.60%	0.9	76.70%	1.3
20	VENICE	88.90%	0.4	78.40%	1.1
21	VIENNA	86.10%	-0.2	74.90%	-1.6
22	ZURICH	84.90%	0.8	70.30%	-1.4

Europe: City Benchmark

Here we have selected 22 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

	City	Q1+Q2 2023 GRI	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	AMSTERDAM	87.60%	-0.6	71.80%	0.7
2	ATHENS	88.30%	-0.9	74.50%	-1.3
3	BARCELONA	89.10%	1.2	76.20%	3.2
4	BERLIN	88.50%	0.5	74.80%	0.1
5	COPENHAGEN	90.00%	1.0	78.70%	1.4
6	DUBLIN	89.60%	0.8	78.00%	5.5
7	EDINBURGH	88.70%	0.6	74.80%	-0.1
8	FLORENCE	91.30%	-0.2	80.40%	1.6
9	HELSINKI	90.40%	0.9	78.30%	2.9
10	ISTANBUL	87.20%	2.4	79.00%	5.5
11	LISBON	90.90%	0.9	79.50%	1.7
12	LONDON	88.80%	1.0	73.90%	2.1
13	MADRID	90.60%	0.5	76.20%	-0.7
14	MILAN	88.80%	1.1	75.20%	2.4
15	MUNICH	88.00%	-0.1	73.10%	-0.5
16	PARIS	87.20%	0.2	73.70%	0.3
17	PRAGUE	89.50%	0.5	78.70%	3.5
18	ROME	88.10%	0.1	74.40%	0.3
19	STOCKHOLM	90.90%	0.9	78.70%	1.9
20	VENICE	90.60%	1.1	76.00%	3.7
21	VIENNA	89.70%	0.2	74.80%	0.6
22	ZURICH	89.80%	1.0	79.70%	2.5

Europe: London City Hotel Ranking

New in this report, the City Hotel Rankings provide the Global Review Index scores for top-ranking hotels and serviced apartments in key cities around the world. The hotels are ranked by performance, and divided into 3-, 4-, and 5-star ratings for increased granularity. For more information, see the Methodology section near the end of the report.

Our congratulations go out to all who made the shortlists. The results are a testament to the continued hard work of thousands of hotels and millions of staff creating great guest experiences day after day.

3-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Holland Park Lifestyle Studios	95.4%	535
2	Cart And Horses	94.3%	108
3	The Harrison	93.0%	118
4	The Fox & Goose Hotel	92.8%	1676
5	Staycity Aparthotels Greenwich High Road	92.3%	837
6	Rose And Crown Hotel	92.3%	147
7	ibis London Canning Town	91.4%	1431
8	Coach & Horses Hotel	91.3%	321
9	hub by Premier Inn London Westminster. St James's Park hotel	90.9%	177
10	Premier Inn London Wandsworth	90.5%	110
11	The White Hart Hotel	90.2%	711
12	Glenlyn Hotel	89.5%	136
13	The Mad Hatter Hotel	89.3%	888
14	Travelodge London Greenwich High Road	89.2%	322
15	The Brewers Inn	89.2%	228
16	Premier Inn London Clapham hotel	89.2%	138
17	Travelodge London Romford	89.0%	102
18	Premier Inn London Blackfriars - Fleet Street	88.4%	375
19	hub by Premier Inn London Tower Bridge hotel	88.3%	135
20	Luna And Simone	88.1%	888

4-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	The Resident Covent Garden	95.2%	614
2	Wilde Aparthotels by Staycity London Paddington	94.8%	2522
3	Wilde Aparthotels by Staycity - Covent Garden	94.8%	1650
4	St. Ermin's Hotel. Autograph Collection	94.5%	783
5	The Resident Victoria	93.4%	697
6	Wilde Aparthotels by Staycity London Aldgate Tower Bridge	93.1%	1068
7	Lost Property St Paul's London - Curio Collection by Hilton	93.0%	463
8	Staybridge Suites London - Vauxhall	92.9%	312
9	Room2 Chiswick Homotel	92.8%	488
10	Hazlitt's	92.7%	181
11	Cove Landmark Pinnacle	92.6%	271
12	Hilton London Tower Bridge	92.3%	916
13	Blackbird	92.1%	237
14	The Rookery Hotel	92.0%	204
15	Collingham Serviced Apartments	92.0%	135
16	The Chesterfield Mayfair	91.9%	901
17	Apex London Wall Hotel	91.9%	458
18	The Laslett	91.9%	150
19	Amba Hotel Charing Cross	91.8%	1261
20	Hotel Xenia. Autograph Collection	91.8%	118

5-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Hotel 41	97.2%	324
2	Hotel Cafe Royal	96.7%	271
3	Claridges	96.5%	499
4	Bankside Hotel. Autograph Collection	96.3%	240
5	Rocco Forte Browns Hotel	95.8%	158
6	One Aldwych	95.7%	224
7	The Soho Hotel	95.5%	160
8	Egerton House	95.1%	288
9	The Savoy	95.0%	1068
10	Cheval Three Quays	94.9%	234
11	Buckingham Lloyds	94.9%	109
12	Four Seasons Hotel London at Park Lane	94.8%	178
13	The Beaumont	94.8%	115
14	Batty Langley's	94.7%	206
15	L'oscar London	94.7%	133
16	Shangri-La Hotel. At The Shard. London	94.6%	1246
17	The Goring	94.6%	157
18	Pan Pacific London	94.5%	927
19	The Connaught	94.5%	248
20	The Milestone Hotel	94.4%	375



Guest Experience Benchmark

CHAPTER

08

LATIN AMERICA & CARIBBEAN

CHAPTER 7

Latin America & Caribbean: Market Overview

After growing RevPAR by 26.2% in 2022 relative to 2019, hotels in South America have continued to enjoy strong demand in 2023, bolstered in part by a strong resort market. Performance has varied sharply by country, however, in part due to political and social unrest. In the Caribbean region, tourist arrivals are expected to increase by ten to 15 percent in 2023, buoyed by strong demand from the U.S. market.¹

After a strong 2022, travel growth slowed in the region

The region earned a Global Review Index of 86.1%

Review volume grew by 16.8%

Google increased review market share to 44.0%

Hotels in our data set in the Latin America & Caribbean region earned a Global Review Index of 86.1% in Q2 2023, a 0.7-point increase over the previous year. However, it was 0.9 points lower than the Q2 2021 GRI of 87.0%.

Hoteliers in the region responded to 56.5% of reviews, 3.1 points less than in Q2 2022. Hotels gave a much higher priority to reviews on Tripadvisor (83.6%) and Expedia (86.0%) than on Booking.com (50.5%) and Google (42.6%).

Review volume grew by 16.8% from Q2 2022 to Q2 2023. All major review sources increased in volume except Booking.com, which fell by 12.2%, and Hotels.com, which fell by 15.5%. Booking.com lost 10.1 points in review market share, generating 30.7% of total volume. Meanwhile, Google increased its share by 13.6 points, accounting for 44.0% of volume. Tripadvisor generated 15.7%.

Of the top five review sources, Google had the highest Source Index, at 87.3%, and Booking.com had the lowest, at 83.3%. Hotels increased the Value Index by 2.6 points, to 84.0%, and the Service Index by 1.8 points to 88.4%. In a similar pattern to other regions, the Room category had the highest negative impact on the region's Global Review Index, driving it down by 1.9 points.

Want to know more about your
online reputation?

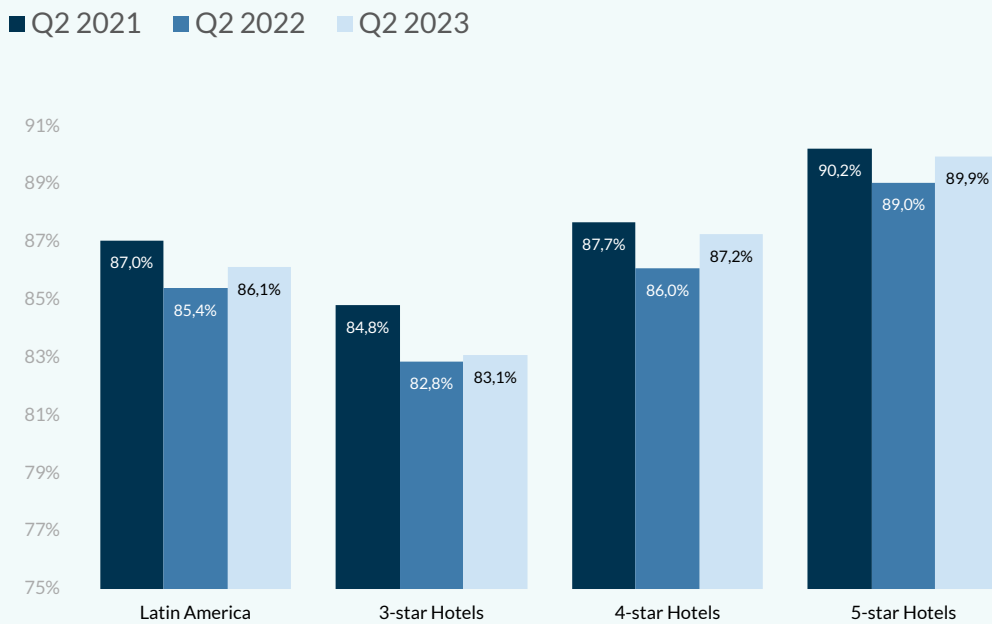
TALK TO US

¹ European Travel Commission. Monitoring Sentiment for Domestic and Intra-European Travel. April 2023.

Latin America & Caribbean: GRI Metrics

Latin America: Global Review Index™ (GRI)

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



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.

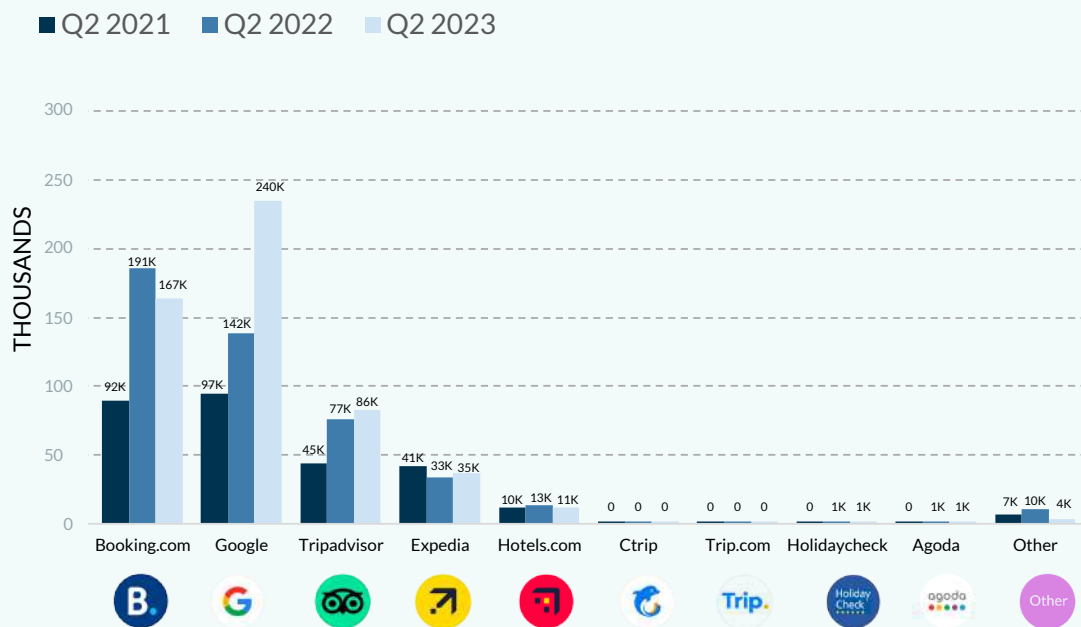
SOURCE



Latin America & Caribbean: Review Volume

Latin America: Review Volume per Source

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



The Review volume collects reviews from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.

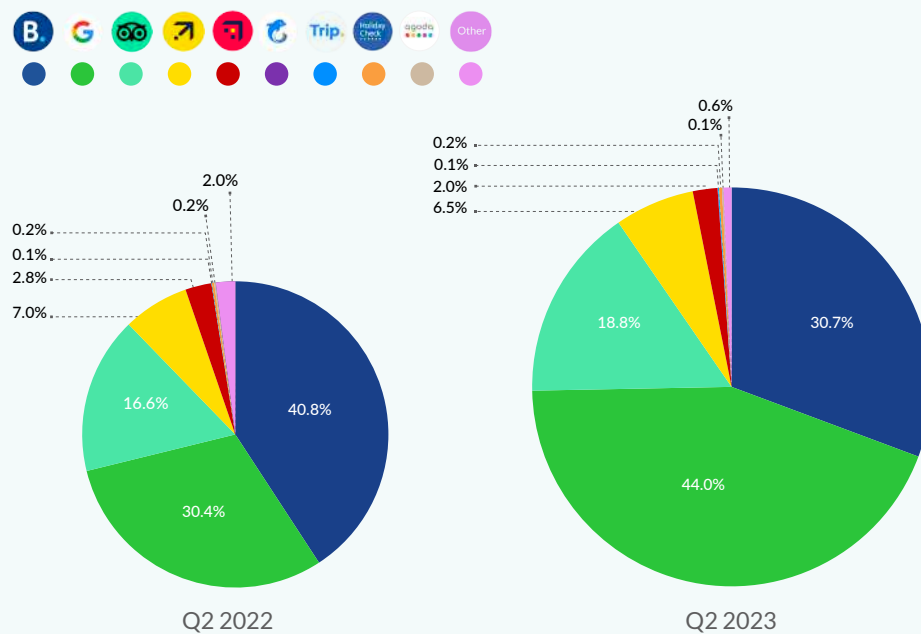
SOURCE



Latin America & Caribbean: Share of Reviews Per Source

Latin America & Caribbean: Share of Reviews 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.

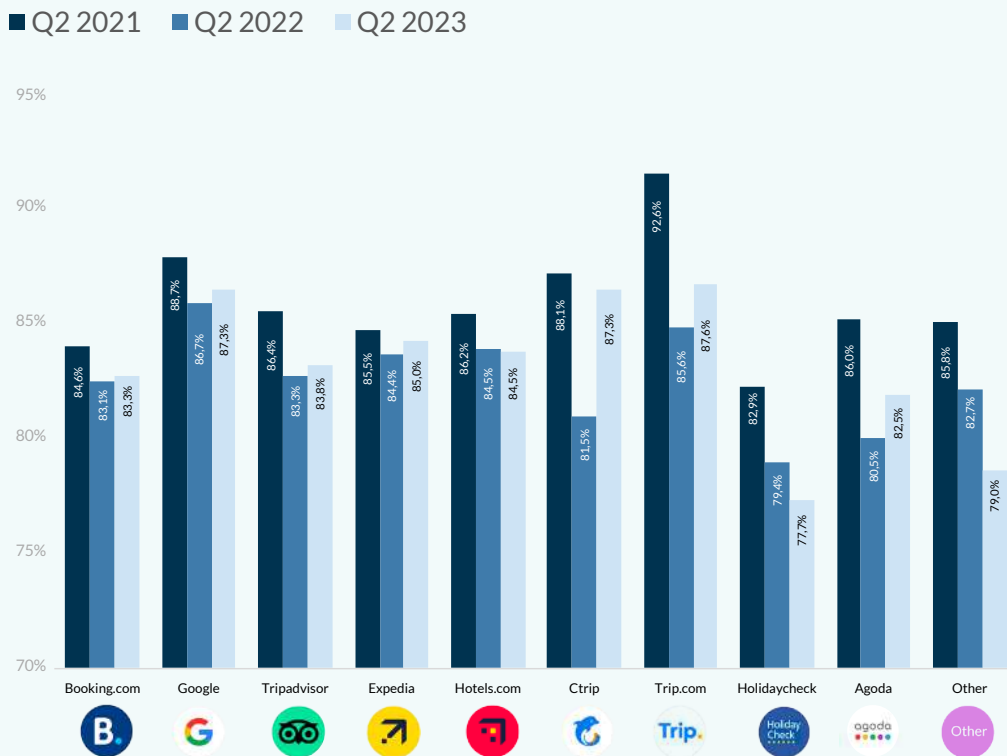
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	40.8%	30.4%	16.6%	7.0%	2.8%	0.0%	0.1%	0.2%	0.2%	2.0%
2023	30.7%	44.0%	18.8%	6.5%	2.0%	0.0%	0.1%	0.2%	0.1%	0.6%
Change Q2 22 vs Q2 23	-10.1	13.6	-0.9	-0.5	-0.8	0.0	0.0	0.0	0.0	-1.4

Latin America & Caribbean: Review Source Indexes

Latin America: Review Source Indexes

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



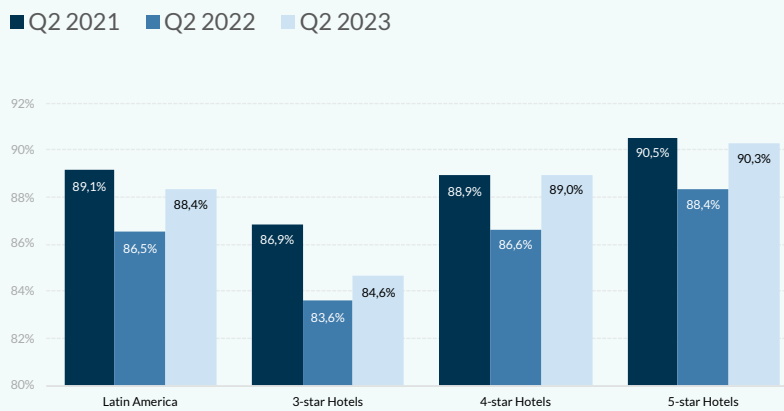
A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm, derived from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

Latin America & Caribbean: Department Indexes

Latin America & Caribbean: Service

Individual department index scores, a three-year comparison.



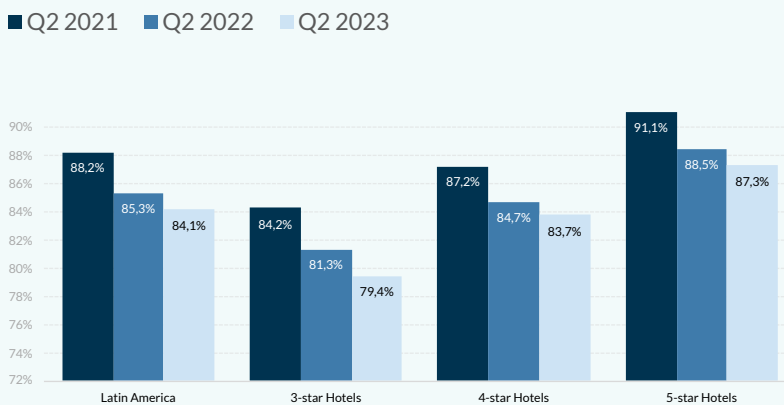
Review scores measured by department, derived from Shiji ReviewPro's proprietary algorithm. The data is drawn from a smaller sample of reviews than the Global Review Index™ (GRI), being collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



Latin America & Caribbean: Room

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

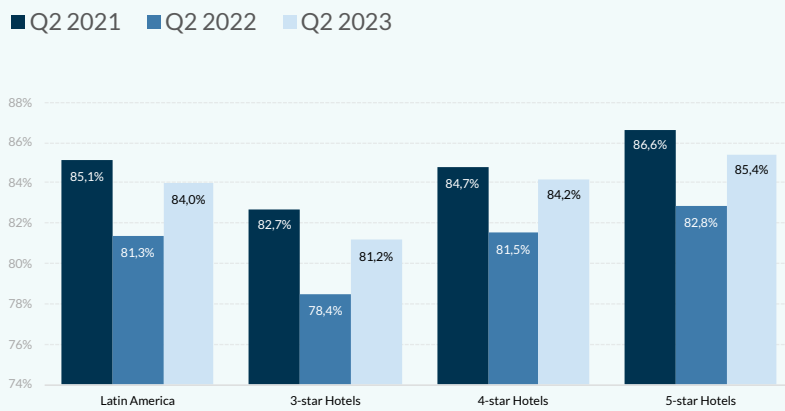
SOURCE



Latin America & Caribbean: Department Indexes

Latin America & Caribbean: Value

Individual department index scores, a three-year comparison.

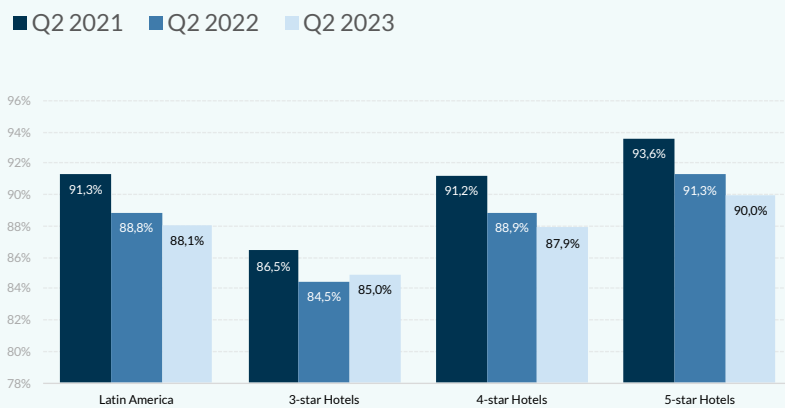


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji | REVIEWPRO

Latin America & Caribbean: Cleanliness

Individual department index scores, a three-year comparison.



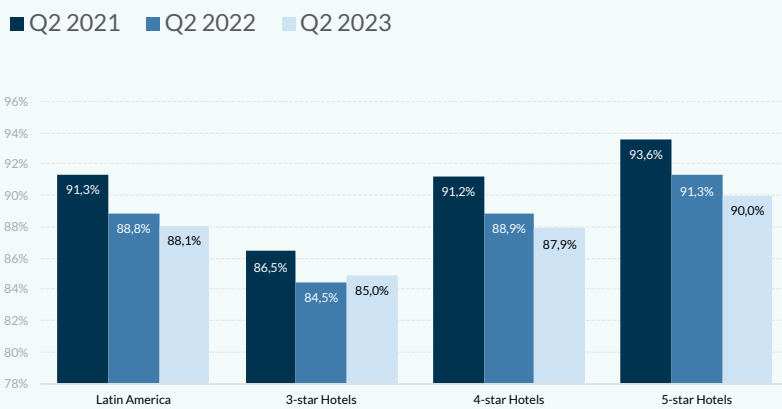
A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji | REVIEWPRO

Latin America & Caribbean: Department Indexes

Latin America & Caribbean: Cleanliness

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji | REVIEWPRO

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 Q2 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.8	ROOM	-1.9
STAFF	0.4	FOOD & DRINKS	-1.6
ENTERTAINMENT	0.3	ESTABLISHMENT	-1.4
FOOD & DRINKS	0.3	CLEANLINESS	-1.3
AMBIENCE	0.1	EXPERIENCE	-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.

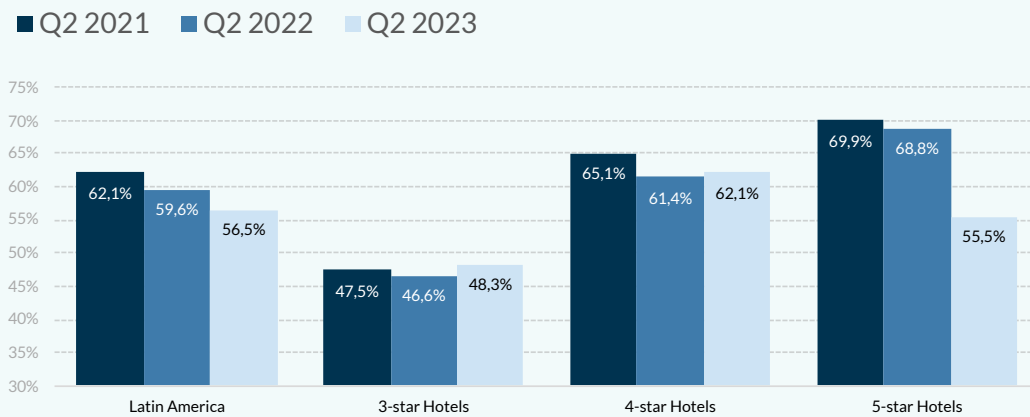
SOURCE



Latin America & Caribbean: Management Responses

Latin 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.



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.

SOURCE



Latin America & Caribbean: Management Responses

Percentage of Positive and Negative Review Response, per Star Category

The percentage of negative and positive online guest reviews being replied to by hoteliers in Q2 2023.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

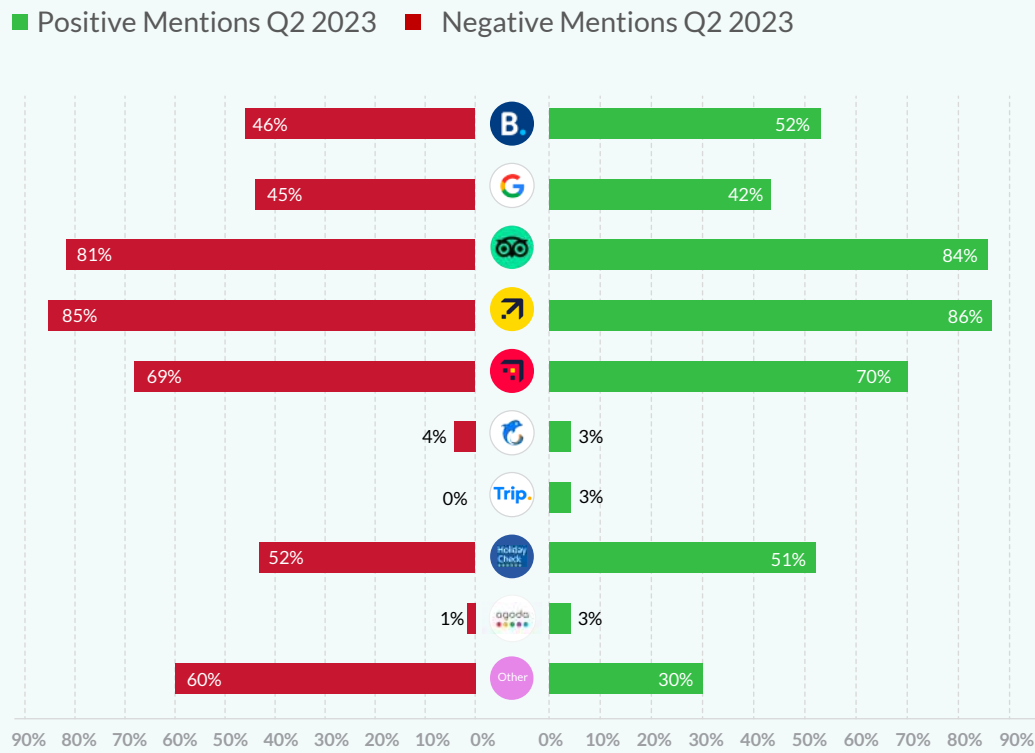
SOURCE

Shiji | REVIEWPRO

Latin America & Caribbean: Management Responses

Percentage of Positive and Negative Review Response, per Review Source

The percentage of negative and positive online guest reviews being replied to by hoteliers, per review source, in Q2 2023.



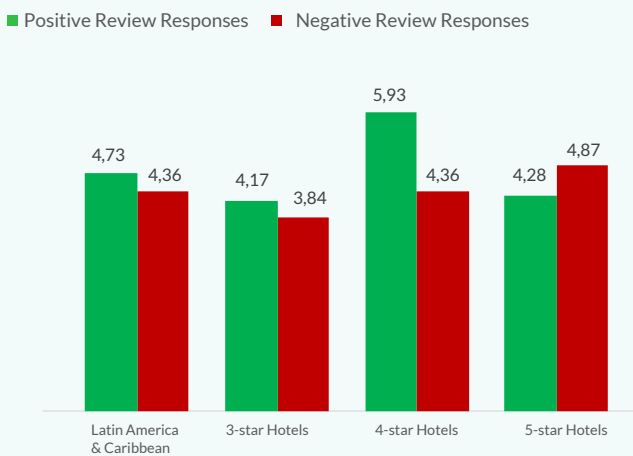
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Latin America & Caribbean: Management Responses

Review Response Times per Star Rating

The number of days it took hotels to respond to positive and negative responsible online guest reviews per star rating in Q2 2023.

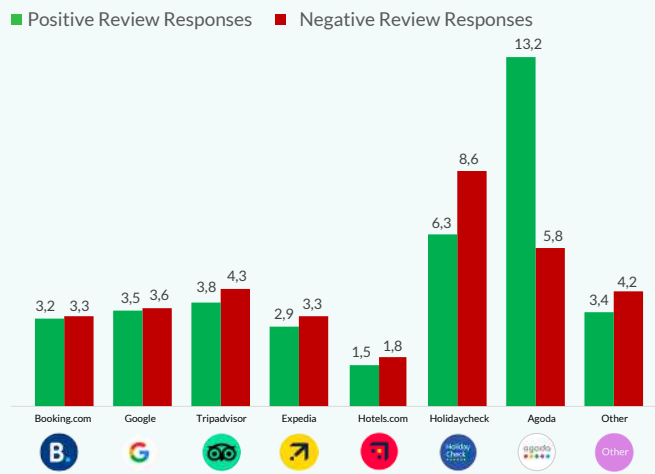


Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Review Response Times per Review Source

The number of days it took hotels to respond to positive and negative responsible online guest reviews per review source in Q2 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.

SOURCE
Shiji | REVIEWPRO

CHAPTER 8



Latin America & Caribbean: City Benchmark

Here we have selected five 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

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	BOGOTA	81.60%	-2.2	63.60%	-0.1
2	BUENOS AIRES	79.40%	0.1	59.70%	0.8
3	LIMA	84.90%	0.9	80.40%	11.6
4	RIO DE JANEIRO	79.40%	-1.4	54.10%	-0.7
5	SAO PAULO	82.10%	0.1	62.90%	3.0

4-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	BOGOTA	87.40%	-1.0	70.60%	-0.6
2	BUENOS AIRES	82.90%	0.6	65.00%	2.8
3	LIMA	88.60%	2.5	86.40%	11.2
4	RIO DE JANEIRO	83.80%	-0.5	62.80%	2.9
5	SAO PAULO	84.60%	-0.2	74.10%	10.4

CHAPTER 8



Latin America & Caribbean: City Benchmark

Here we have selected five 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.

5-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	BOGOTA	88.80%	-0.6	72.90%	-0.3
2	BUENOS AIRES	88.70%	0.1	71.60%	1.6
3	LIMA	91.70%	2.2	91.00%	8.5
4	RIO DE JANEIRO	89.10%	0.0	75.70%	9.4
5	SAO PAULO	92.10%	1.4	90.40%	17.5

CHAPTER 8

Latin America & Caribbean: Rio de Janeiro City Hotel Ranking

New in this report, the City Hotel Rankings provide the Global Review Index scores for top-ranking hotels and serviced apartments in key cities around the world. The hotels are ranked by performance, and divided into 3-, 4-, and 5-star ratings for increased granularity. For more information, see the Methodology section near the end of the report.

Our congratulations go out to all who made the shortlists. The results are a testament to the continued hard work of thousands of hotels and millions of staff creating great guest experiences day after day.

3-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Residence Inn by Marriott Rio de Janeiro Barra da Tijuca	91.1%	187
2	Ipanema Inn	90.7%	374
3	B&B HOTEL Rio de Janeiro Norte	89.0%	776
4	Windsor Copa Hotel	88.5%	657
5	Elegance Praia Hotel	87.3%	1042
6	TRYP By Wyndham Rio De Janeiro Barra Parque Olimpico	87.3%	726
7	B&B Hotels Rio Copacabana Posto 5	87.3%	603
8	Ramada Rio de Janeiro Recreio	87.1%	884
9	Windsor Martinique Hotel	86.5%	692
10	Fluminense Hotel	86.3%	604
11	Ibis Rio de Janeiro Nova America	85.6%	713
12	Saionara Hotel	85.5%	794
13	Hotel Regina	85.2%	1006
14	Petit Rio Hotel	85.2%	648
15	Windsor Asturias Hotel	85.2%	638
16	Linx Galeao	85.1%	1667
17	Entremares Hotel	84.9%	268
18	Mengo Palace Hotel	84.5%	482
19	Riale Imperial Flamengo	84.2%	675
20	Hotel Monte Castelo	84.2%	445

4-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Novotel Rio de Janeiro Leme	92.9%	1645
2	Windsor Leme Hotel	91.4%	923
3	Windsor California Hotel	91.2%	1366
4	PortoBay Rio de Janeiro	90.9%	953
5	Windsor Oceanico	89.8%	1739
6	Orla Copacabana Hotel	89.5%	1307
7	Scorial Rio Hotel	89.5%	1021
8	Atlantico Sul Hotel	89.4%	592
9	Hotel Arpoador	89.4%	421
10	Courtyard by Marriott Rio de Janeiro Barra da Tijuca	89.3%	283
11	Novotel Rio De Janeiro Parque Olimpico	89.2%	767
12	Vila Gale Rio de Janeiro	89.1%	2259
13	Windsor Guanabara Hotel	89.1%	1127
14	CDesign Hotel	88.9%	1494
15	Windsor Tower Hotel	88.9%	1138
16	Intercity Rio de Janeiro Porto Maravilha	88.8%	867
17	Windsor Florida Hotel	88.5%	1781
18	Promenade Palladium	88.5%	265
19	Venit Barra Hotel	88.3%	385
20	Venit Mio Hotel	88.1%	347

5-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Belmond Copacabana Palace	98.6%	10011
2	Santa Teresa Hotel RJ - MGallery	94.8%	421
3	Hilton Barra Rio de Janeiro	93.5%	2492
4	Vila Santa Teresa	93.5%	148
5	Hotel Fasano Rio de Janeiro	93.4%	689
6	Miramar Hotel by Windsor	93.3%	1933
7	Fairmont Rio de Janeiro Copacabana	92.6%	1244
8	Emiliano Rio	92.3%	551
9	Grand Hyatt Rio de Janeiro	91.5%	1416
10	Hilton Rio De Janeiro Copacabana	90.5%	2606
11	Sheraton Grand Rio Hotel & Resort	90.1%	1729
12	Windsor Marapendi	89.8%	1861
13	Yoo2 Rio de Janeiro by Intercity	88.5%	368
14	Windsor Barra Hotel	87.9%	1387
15	JW Marriott Hotel Rio de Janeiro	86.4%	823
16	Hotel Nacional Rio de Janeiro	83.9%	1985
17	Rio Othon Palace	83.7%	4108
18	Grand Mercure Rio de Janeiro Copacabana	81.9%	668
19	LSH By OWN	79.6%	704
20	Wyndham Rio de Janeiro Barra	71.3%	1432



Guest Experience Benchmark

CHAPTER

09

MIDDLE EAST

Middle East: Market Overview

Hotels in the Middle East experienced a robust recovery in 2022, propelled in part by mega events like the FIFA World Cup in Qatar. Growth has continued in 2023 but may be tempered by increased room supply, with Qatar expected to grow in room supply by 29%, Saudi Arabia by 15.3%, and UAE by 9.8%.¹

Growth in room supply is expected to affect demand in 2023

The Global Review Index was 83.4%, lower than in any other region

Booking.com generated almost half of reviews

Tripadvisor had an unusually high Source Index of 90.0%

Hoteliers responded to 76.5% of reviews, higher than any other region

Hotels in the region earned a Global Review Index of 83.4% in the second quarter of 2023. This was an increase of 2.1 points over Q2 2022 but was still the lowest GRI of the six regions. The 3-star segment was the only segment in the six regions to dip below 80%, with a GRI of 77.8%.

Review volume grew by 12.0% from Q2 2022 to Q2 2023. All major review sources grew substantially in volume, with the exceptions of Booking.com, which fell by 2.6%, and Hotels.com, which fell by 12.9%. Booking.com generated almost half of reviews (49.5%), although it lost 7.4 points in market share. Google increased its share by 5.7 points, accounting for 36.6% of review volume.

Of the top review sources, Tripadvisor had the highest Source Index, at 90.0%, six points higher than the global average of 84.0%. Booking.com's Source Index was almost ten points lower than Tripadvisor's, at 80.3%.

The region's top five Department Indexes were high relative to other regions, with a Service Index of 91.9%, Cleanliness Index of 91.7%, and Room Index of 89.2%. Even the Value Index was high, at 88.8%, an increase of 5.0 points.

Hotels in the Middle East had the highest review response rate of the six regions, at 76.5%, 14.9 points above the global average.

Want to know more about your online reputation?

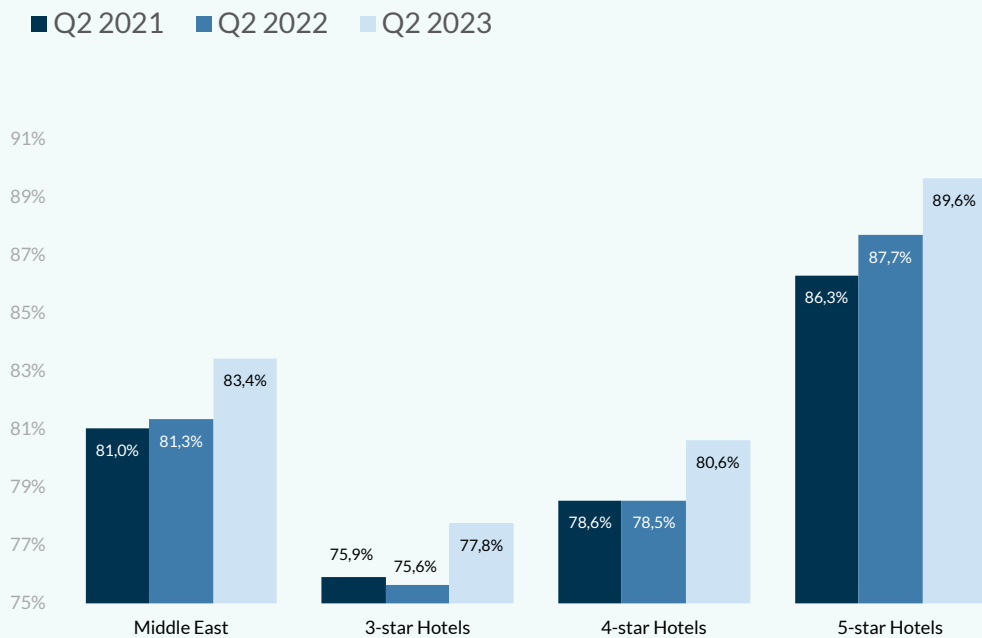
TALK TO US

¹ Wooller, Philip. STR Middle East – Market Snapshot 2022/2023. The Hotel Yearbook 2023.

Middle East: GRI Metrics

Middle East: Global Review Index™ (GRI)

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



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.

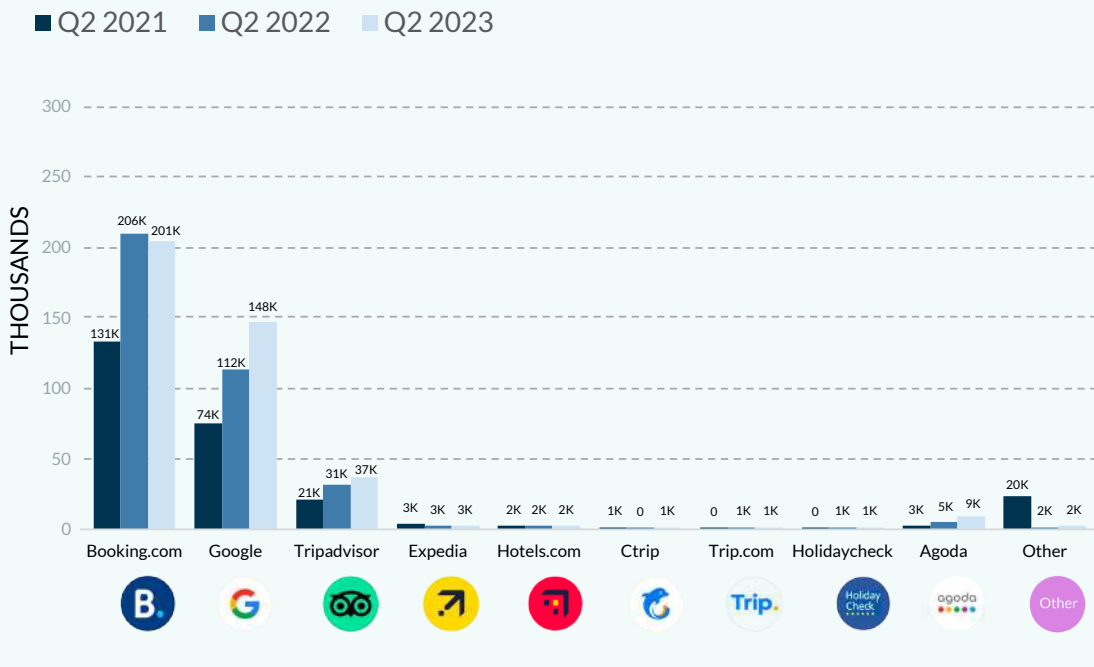
SOURCE



Middle East: Review Volume

Middle East: Review Volume per Source

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



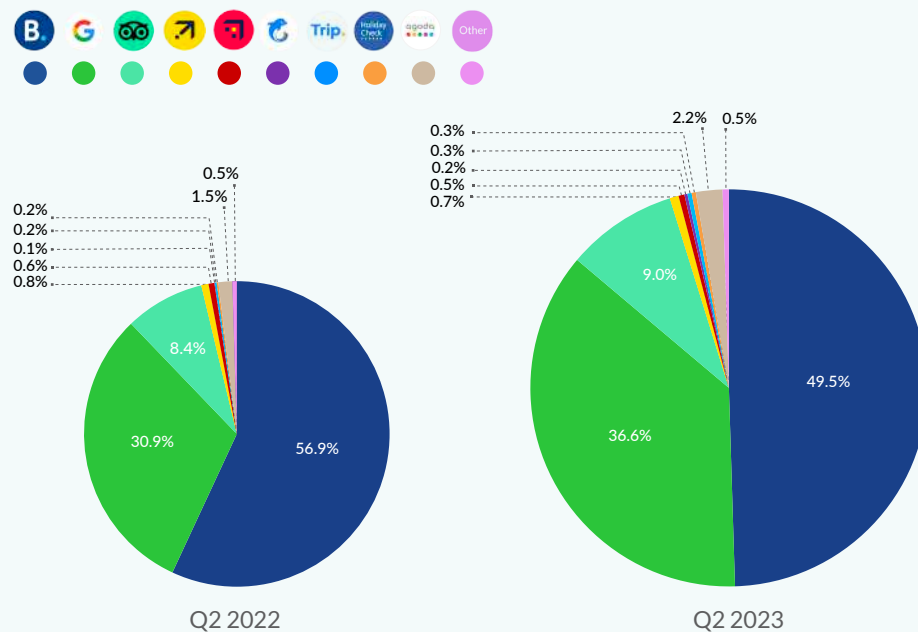
The Review volume collects reviews from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

Middle East: Share of Reviews Per Source

Middle East: Share of Reviews 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.

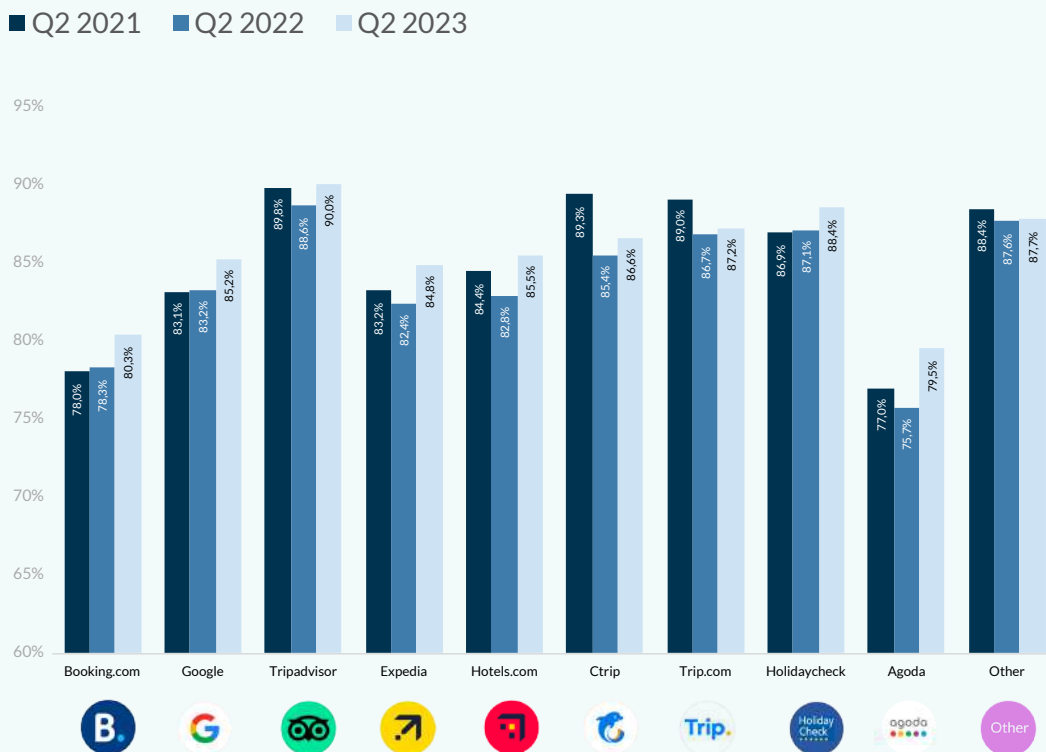
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	56.9%	30.9%	8.4%	0.8%	0.6%	0.1%	0.2%	0.2%	1.5%	0.5%
2023	49.5%	36.6%	9.0%	0.7%	0.5%	0.2%	0.3%	0.3%	2.2%	0.5%
Change Q2 22 vs Q2 23	-7.4	5.7	0.6	0.0	-0.1	0.2	0.2	0.2	0.7	0.0

Middle East: Review Source Indexes

Middle East: Review Source Indexes

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



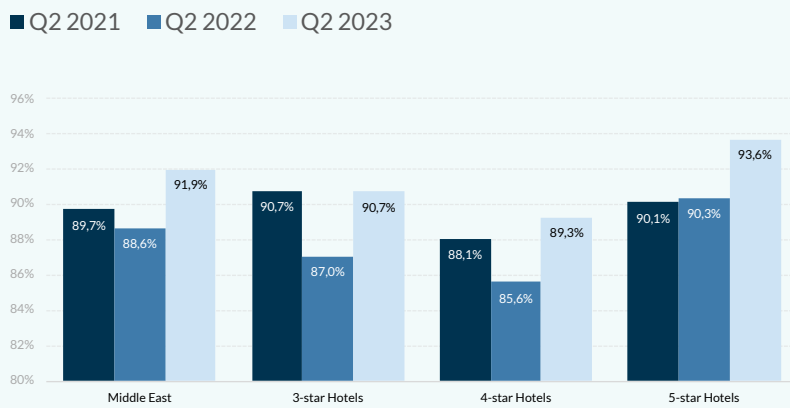
A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm, derived from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

Middle East: Department Indexes

Middle East: Service

Individual department index scores, a three-year comparison.

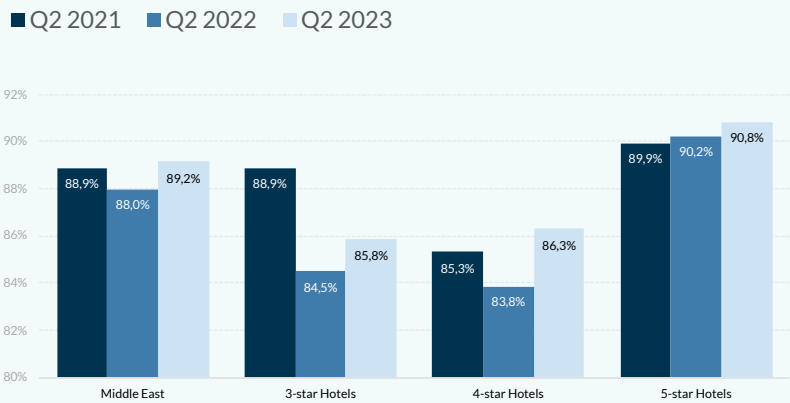


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji | REVIEWPRO

Middle East: Room

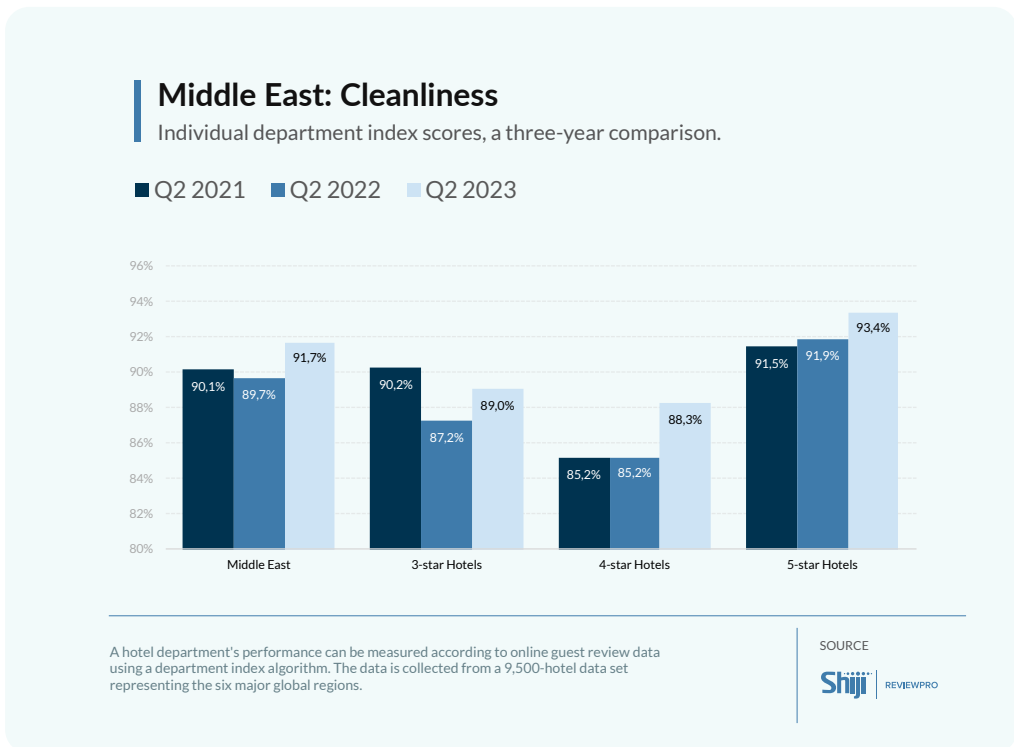
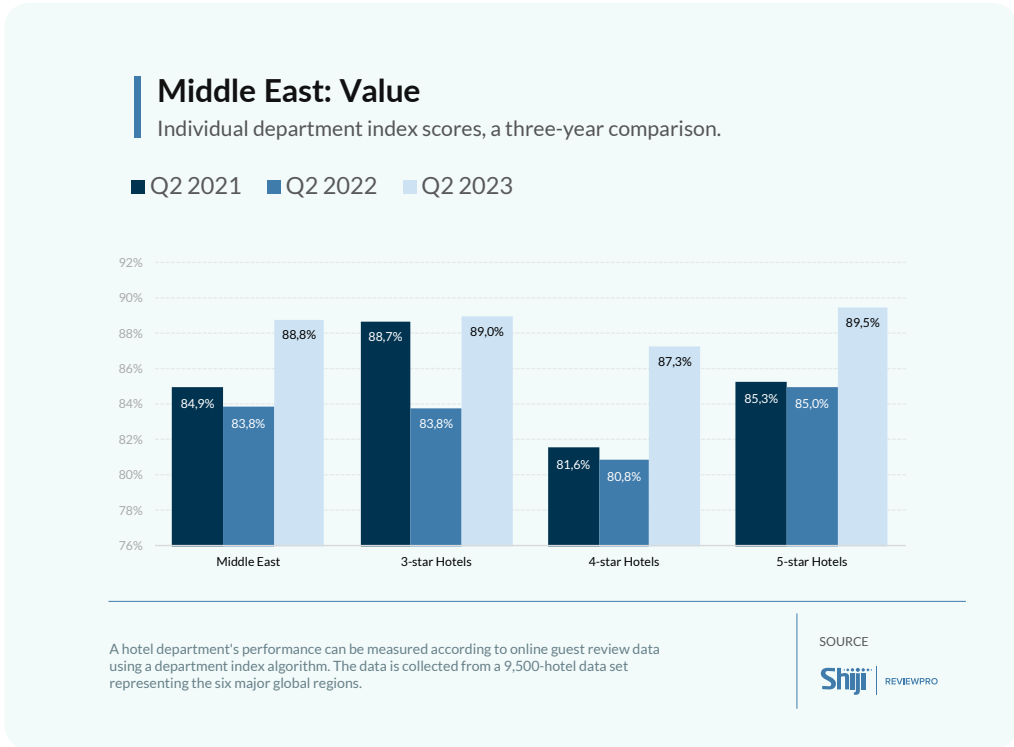
Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji | REVIEWPRO

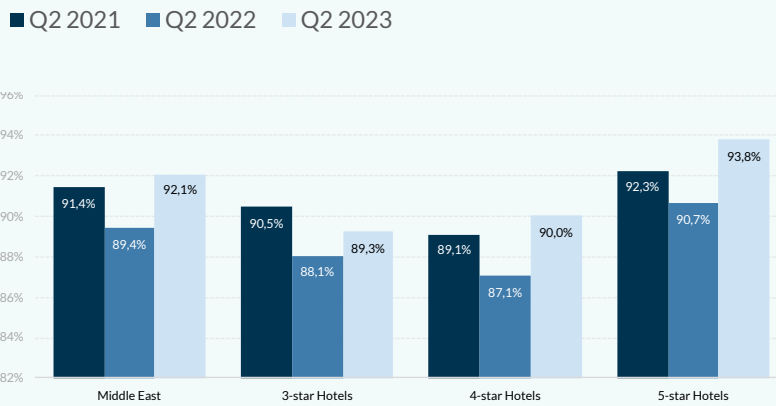
Middle East: Department Indexes



Middle East: Department Indexes

Middle East: Location

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



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 Q2 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	1.0	ROOM	-1.3
STAFF	0.9	CLEANLINESS	-1.0
SERVICE	0.8	ESTABLISHMENT	-1.0
ESTABLISHMENT	0.7	FOOD & DRINKS	-0.8
CLEANLINESS	0.6	STAFF	-0.8

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.

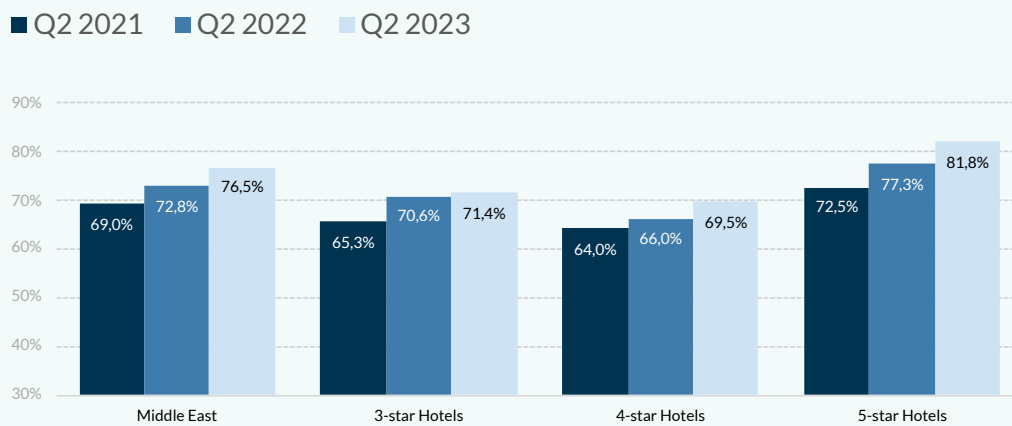
SOURCE


 Shiji | REVIEWPRO

Middle East: Management Responses

Middle East: Review Response by Star Rating

The percentage of respondable 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.

SOURCE

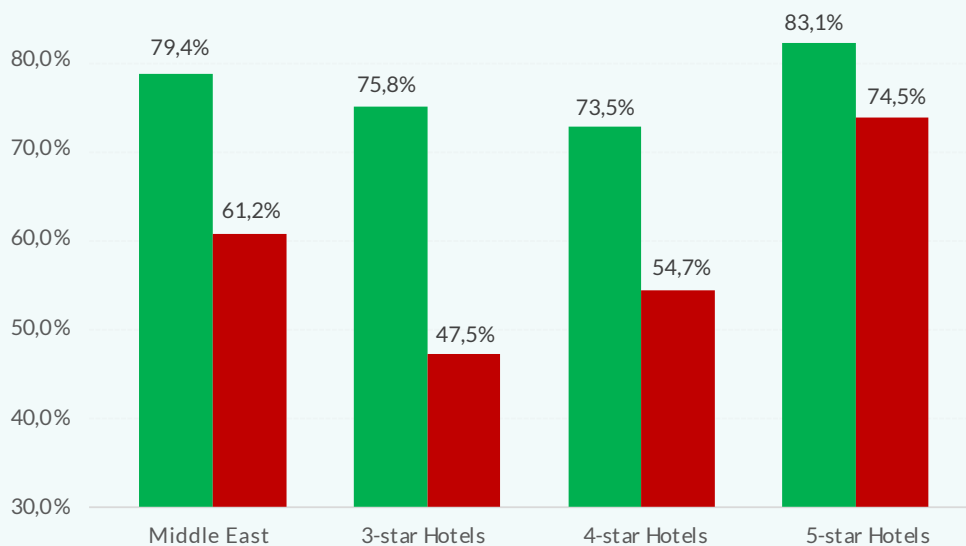


Middle East: Management Responses

Positive/Negative Review Responses Per Category

Review Responses (%) over Q2 2021, 2022, 2023 per Category (Pos/Neg)

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 2023



Shiji ReviewPro's index that tallies the percentage of responsible Positive vs Negative reviews the Hotels have responded to, per category (Positive vs. Negative Reviews), as a proxy of guest care and revenue optimization of the review sources.

SOURCE

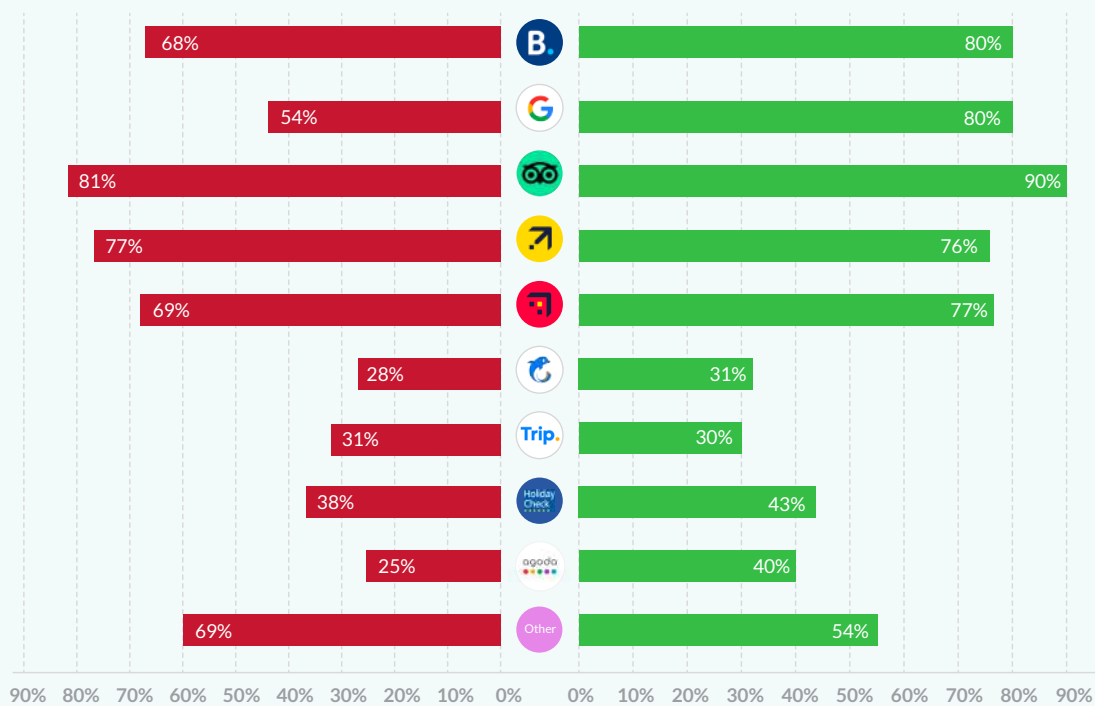


Middle East: Management Responses

Positive/Negative Review Responses Per Category

Review Responses (%) over Q2 2021, 2022, 2023 per Category (Pos/Neg)

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 2023



Shiji ReviewPro's index that tallies the percentage of responsible Positive vs Negative reviews the Hotels have responded to, per category (Positive vs. Negative Reviews), as a proxy of guest care and revenue optimization of the review sources.

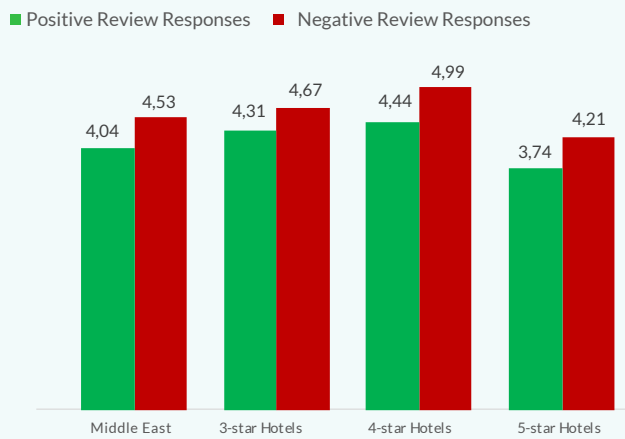
SOURCE



Middle East: Management Responses

Average Response Time Per Category (Days)

Average response Time (Days) over Q2 2021, 2022, 2023 per Category (Pos/Neg)

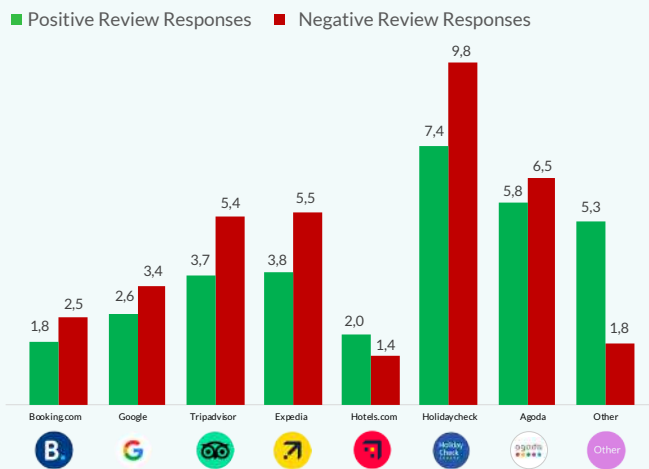


Shiji ReviewPro's index shows the average time (Days) it takes for the Hotels included in the report to respond to responsible reviews. The figures show the number of days for a subset of review sources that show a clear time-stamp on the date of publication of the reviews/response.

SOURCE
Shiji REVIEWPRO

Average Response Time Per Source (Days)

Average response Time (Days) over Q2 2021, 2022, 2023 per Category (Pos/Neg)



Shiji ReviewPro's index shows the average time (Days) it takes for the Hotels included in the report to respond to responsible reviews. The figures show the number of days for a subset of review sources that show a clear time-stamp on the date of publication of the reviews/response.

SOURCE
Shiji REVIEWPRO

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

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	ABU DHABI	78,30%	1,4	73,50%	1,9
2	DUBAI	77,40%	3,3	80,80%	4,2
3	RIYADH	72,30%	2,1	60,50%	6,3

4-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	ABU DHABI	84,20%	1,8	77,10%	1,2
2	DUBAI	82,90%	2,8	78,50%	5,7
3	RIYADH	79,10%	2,4	66,80%	2,6

5-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	ABU DHABI	91,50%	1,9	83,40%	1,0
2	DUBAI	91,00%	2,0	84,40%	3,8
3	RIYADH	85,20%	2,0	79,00%	10,2

Middle East: Dubai City Hotel Ranking

New in this report, the City Hotel Rankings provide the Global Review Index scores for top-ranking hotels and serviced apartments in key cities around the world. The hotels are ranked by performance, and divided into 3-, 4-, and 5-star ratings for increased granularity. For more information, see the Methodology section near the end of the report.

Our congratulations go out to all who made the shortlists. The results are a testament to the continued hard work of thousands of hotels and millions of staff creating great guest experiences day after day.

3-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Rove City Centre	95.7%	2928
2	Rove Healthcare City	95.4%	2649
3	Rove Downtown	95.3%	3919
4	Rove Dubai Marina	95.2%	2505
5	Rove Trade Centre	94.8%	2972
6	Rove City Walk	94.2%	4807
7	Studio M Arabian Plaza	93.7%	4584
8	Rove Expo 2020	93.7%	2770
9	Citadines Culture Village Dubai. Waterfront Jaddaf	93.5%	1224
10	Element Al Jaddaf. Dubai	93.5%	301
11	Arabian Park Hotel	93.3%	2063
12	Rove La Mer Beach	92.9%	3351
13	Premier Inn Dubai Silicon Oasis	91.6%	1821
14	Ibis Al Rigga	91.2%	3843
15	Holiday Inn Express Dubai. Internet City	91.2%	1752
16	Premier Inn Dubai Investment Park	91.0%	1798
17	Al Bustan Centre & Residence	89.9%	380
18	Al Khoory Executive Hotel. Al Wasl	89.5%	1176
19	Premier Inn Dubai Al Jaddaf	89.3%	3148
20	Novotel Suites Dubai Mall of the Emirates	89.0%	1751

4-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Vida Dubai Marina Yacht Club	97.1%	2694
2	Adagio Premium Dubai Al Barsha	97.0%	284
3	Vida Emirates Hills	96.6%	1398
4	Voco Dubai The Palm	95.3%	826
5	Holiday Inn Dubai Festival City	94.1%	2997
6	Residence Inn By Marriott Sheikh Zayed Road	94.0%	1578
7	First Central Hotel Suites	93.5%	2959
8	Copthorne Hotel Dubai	93.3%	2390
9	Vida Creek Harbour	93.1%	1632
10	Manzil Downtown	93.1%	1532
11	Vida Downtown	93.0%	1474
12	Ramada by Wyndham Downtown Dubai	92.8%	2958
13	Courtyard By Marriott Al Barsha. Dubai	92.7%	1275
14	Adagio Premium The Palm	92.6%	1216
15	Park Inn by Radisson Dubai Motor City	92.4%	1094
16	dusitD2 kenz Hotel Dubai	92.2%	2073
17	DoubleTree by Hilton Dubai Business Bay	92.2%	1113
18	Citadines Metro Central Dubai	91.9%	872
19	SUHA Creek Hotel Apartments	91.9%	389
20	TRYP by Wyndham Dubai	91.8%	4310

5-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Rixos The Palm Dubai	97.8%	1825
2	SOFITEL DUBAI THE OBELISK	97.2%	5155
3	Cheval Maison - The Palm Dubai	96.9%	182
4	Al Jaddaf Rotana Suite Hotel	96.3%	3185
5	Conrad Dubai	96.2%	2511
6	Address Dubai Marina	96.2%	2036
7	Waldorf Astoria Dubai International Financial Centre	96.2%	617
8	Sofitel Dubai Jumeirah Beach	96.1%	4687
9	Al Maha. a Luxury Collection Desert Resort & Spa. Dubai	95.9%	211
10	Waldorf Astoria Dubai Palm Jumeirah	95.8%	2156
11	Address Boulevard	95.8%	1772
12	Grosvenor House. a Luxury Collection Hotel. Dubai	95.8%	928
13	The Ritz-Carlton. Dubai	95.6%	1020
14	Address Dubai Mall	95.5%	1996
15	Kempinski Hotel & Residences Palm Jumeirah	95.5%	625
16	One&Only The Palm	95.5%	207
17	Nikki Beach Resort & Spa Dubai	95.1%	819
18	Kempinski Hotel Mall Of The Emirates	95.0%	3036
19	InterContinental Dubai Marina	95.0%	1910
20	Le Royal Meridien Beach Resort & Spa Dubai	95.0%	1040



Guest Experience Benchmark

CHAPTER

10

AFRICA

Africa: Market Overview

In 2022, hotels in Africa experienced remarkable growth, increasing RevPAR by 23.5% and ADR by 38.3% relative to 2019, although occupancy declined by 10.7%.¹ In 2023, the growth has continued, although at a slower pace and with significant variances in performance by country.

The pace of travel growth in Africa has slowed

Hotels earned a GRI of 85.4% in the quarter

Review volume grew by 23.4%

Google generated 41.9% of reviews

In the second quarter of this year, hotels in our data set in the African region achieved a Global Review Index of 85.4%, an increase of 0.5 points over the same quarter last year and just slightly lower than the global GRI.

The region grew its review volume by 23.4% over Q2 2022. All major sources increased except Hotels.com, which fell by 6.0%. Google represented the highest market share of reviews, at 41.9%. Booking.com accounted for 33.2%, a loss of 4.6 points over Q2 2022. Tripadvisor represented 14.4%.

Of the top five review sources, the highest Source Index came from Tripadvisor, at 86.6%, closely followed by Google at 86.1%. Booking.com had the lowest Source Index, at 81.9%.

In semantic analysis of review comments, the Food and Drinks and Room categories had the highest negative impact on the GRI, each driving it down by 1.4 points. The Experience category boosted the GRI by 0.8 points.

Hoteliers responded to 73.8% of reviews, an increase of 6.5 points from Q2 2022. The response rate was 12.2 points higher than the global average of 61.6%. A much higher proportion of positive reviews (77.4%) received a response than negative reviews (49.2%).

Want to know more about your online reputation?

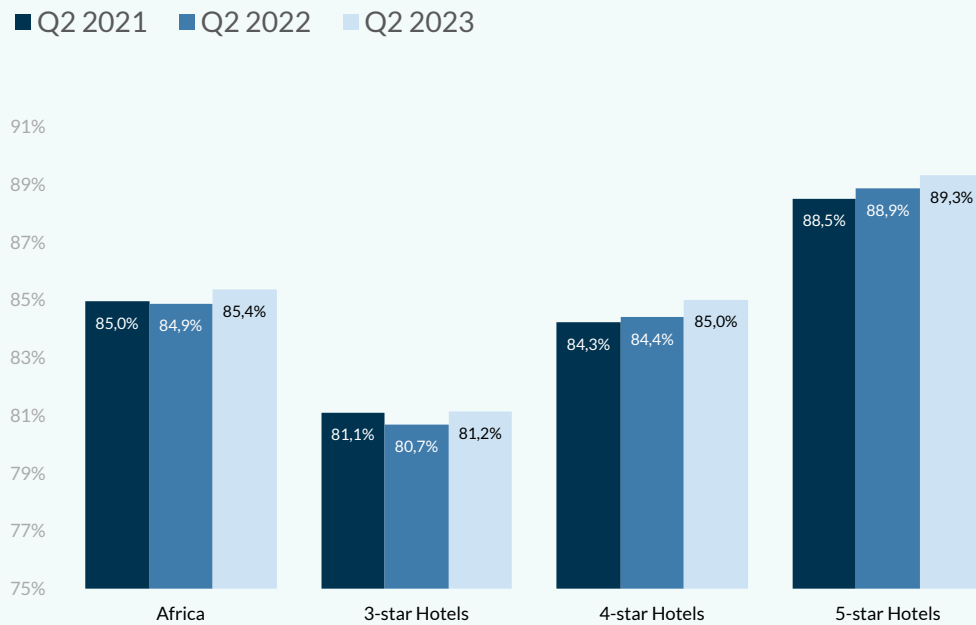
TALK TO US

¹ STR. Most Global Regions Showed Full RevPAR Recovery in 2022. January 2023.

Africa: GRI Metrics

Africa: Global Review Index™ (GRI)

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



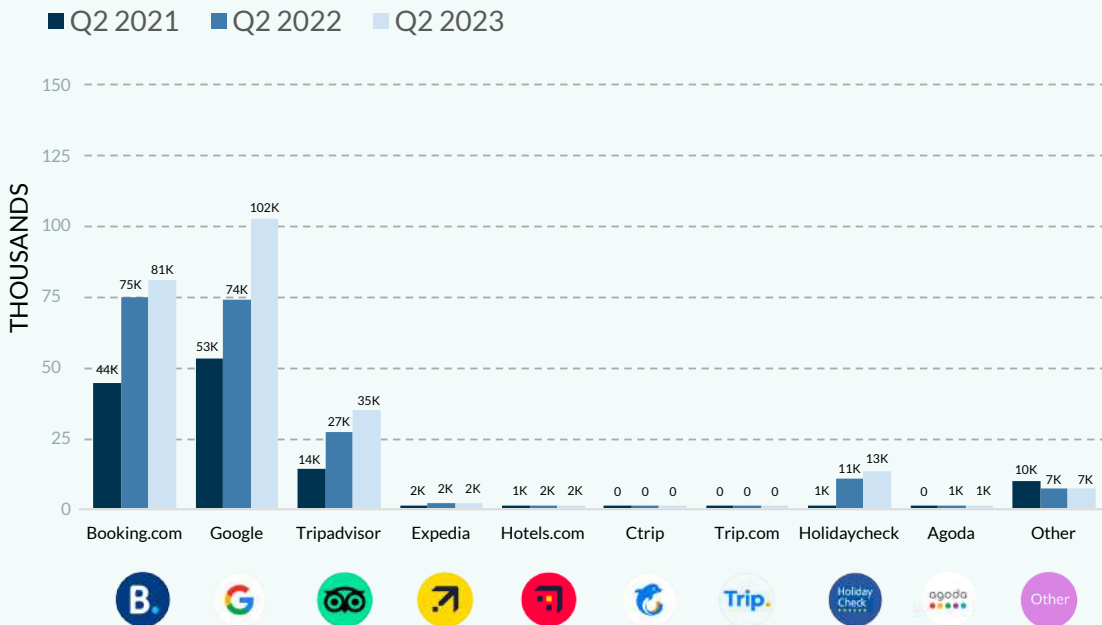
The Global Review Index™ (GRI) is Shiji ReviewPro's industry-standard online reputation score. It is derived from a proprietary algorithm based on review data collected from more than 140 online travel agencies (OTAs) and review sites in over 45 languages.

SOURCE


Africa: Review Volume

Africa: Volume of Reviews per Source

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



The Review volume collects reviews from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.

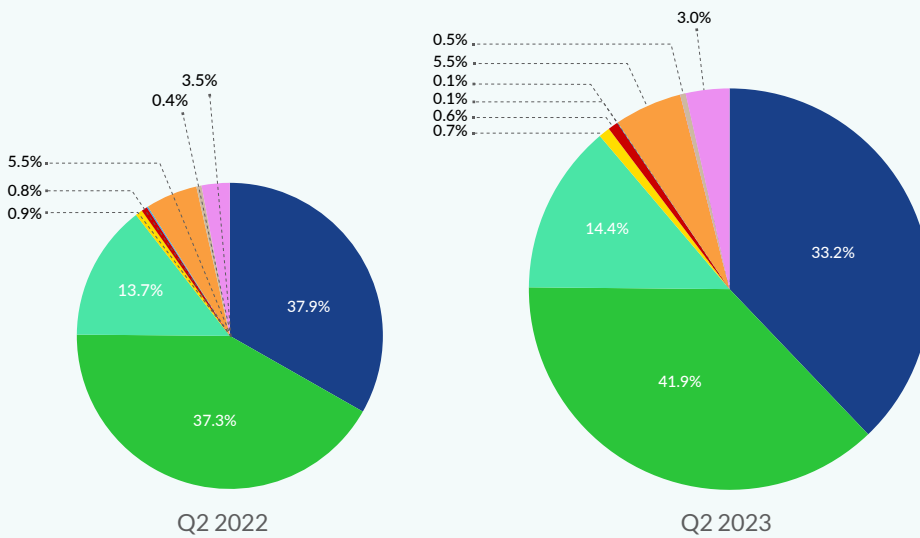
SOURCE



Africa: Share of Reviews Per Source

Africa: Share of Reviews 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.

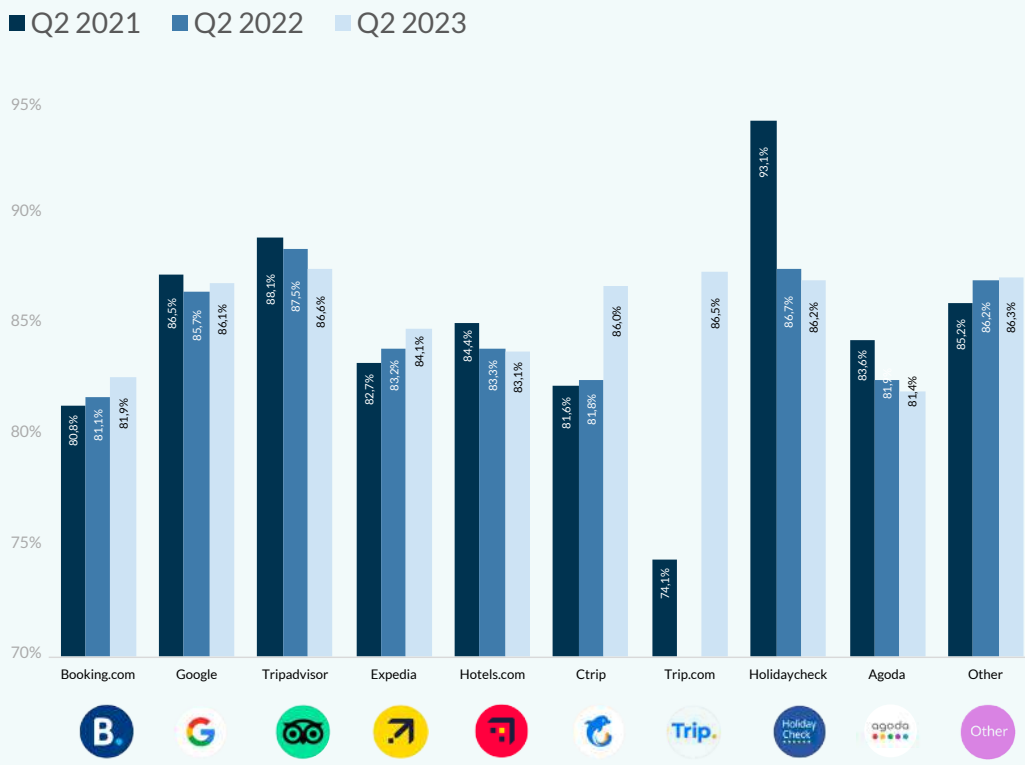
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	37.9%	37.3%	13.7%	0.9%	0.8%	0.0%	0.0%	5.5%	0.4%	3.5%
2023	33.2%	41.9%	14.4%	0.7%	0.6%	0.1%	0.1%	5.5%	0.5%	3.0%
Change Q2 22 vs Q2 23	-4.6	4.6	0.7	-0.2	-0.2	0.0	0.1	0.0	0.1	-0.5

Africa: Review Source Indexes

Africa: Review Source Indexes

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



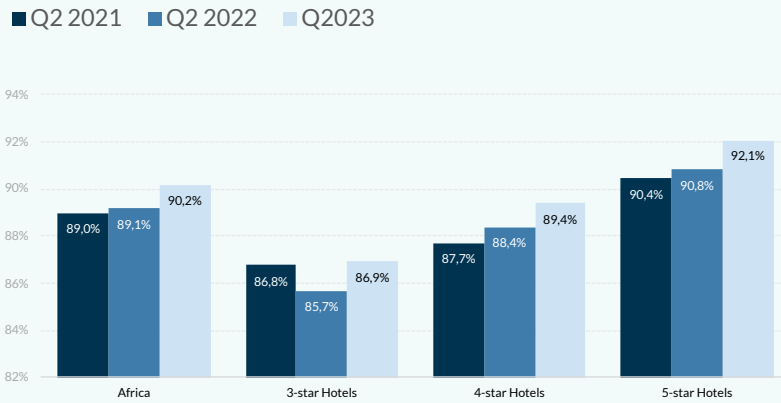
A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm, derived from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

Africa: Department Indexes

Africa: Service

Individual department index scores, a three-year comparison.

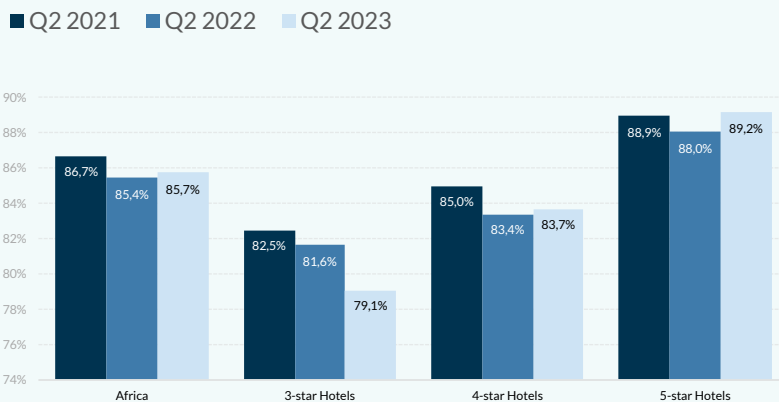


A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji REVIEWPRO

Africa: Room

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

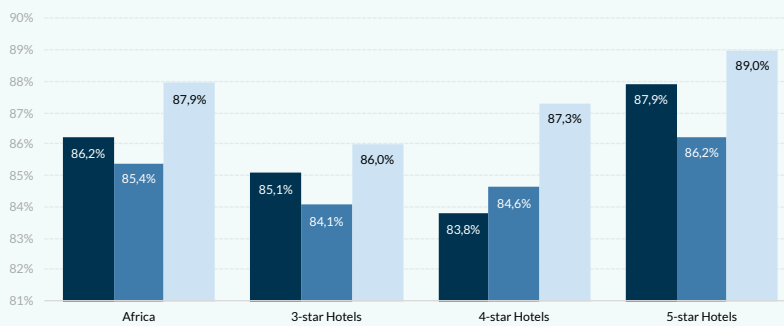
SOURCE
Shiji REVIEWPRO

Africa: Department Indexes

Africa: Value

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

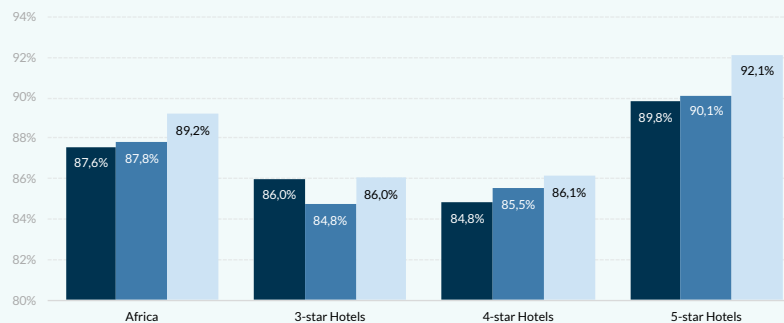
SOURCE



Africa: Cleanliness

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE

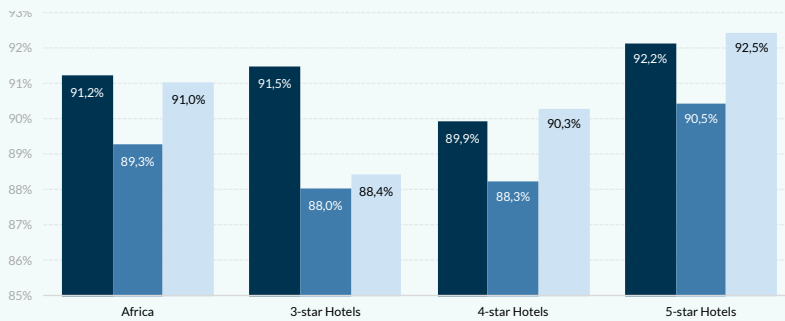


Africa: Department Indexes

Africa: Location

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



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 Q2 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	0.8	FOOD & DRINKS	-1.4
STAFF	0.7	ROOM	-1.4
ESTABLISHMENT	0.5	ESTABLISHMENT	-1.1
ENTERTAINMENT	0.4	CLEANLINESS	-1.1
FOOD & DRINKS	0.3	EXPERIENCE	-0.8

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.

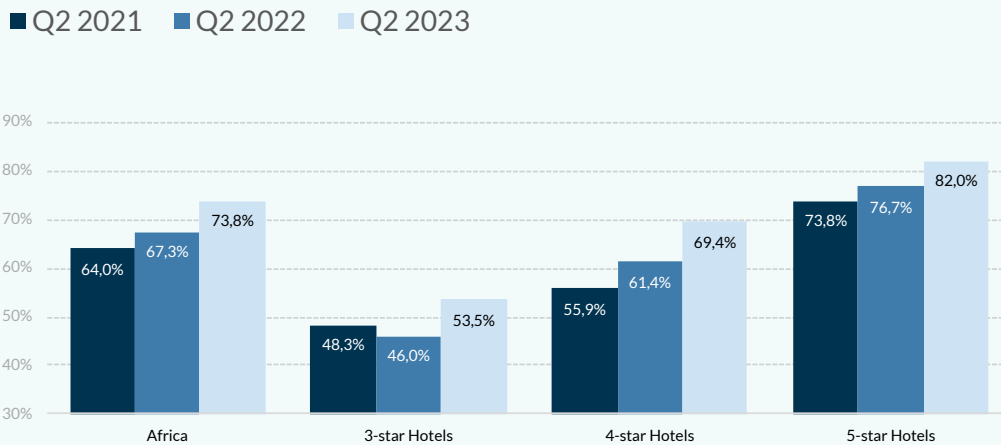
SOURCE

Shiji | REVIEWPRO

Africa: Management Responses

Africa: Review Response by Star Rating

The percentage of respondable 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.

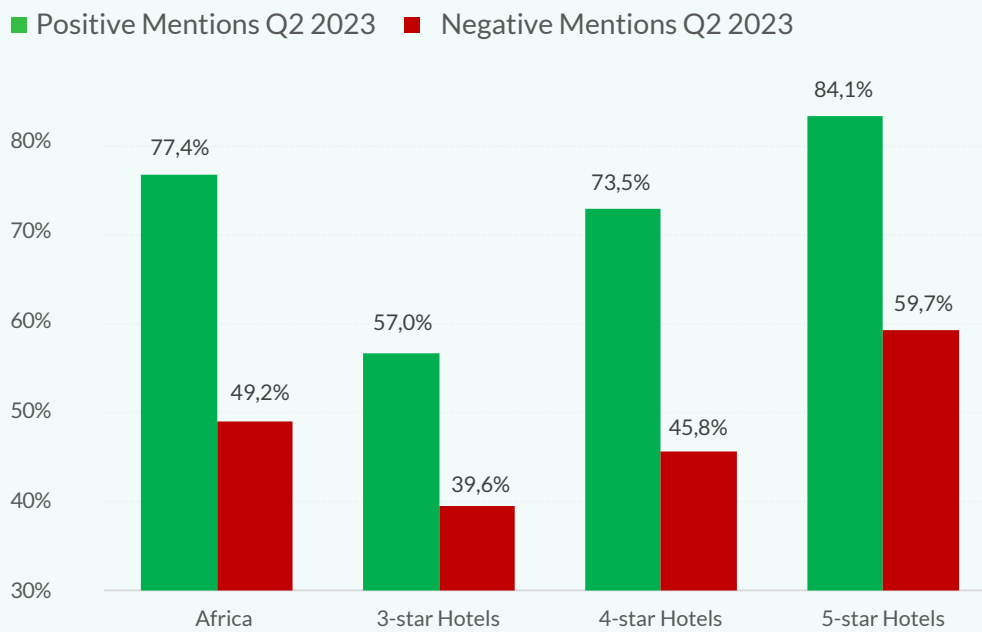
SOURCE



Africa: Management Responses

Percentage of Positive and Negative Review Response, per Star Category

The percentage of negative and positive online guest reviews being replied to by hoteliers in Q2 2023.



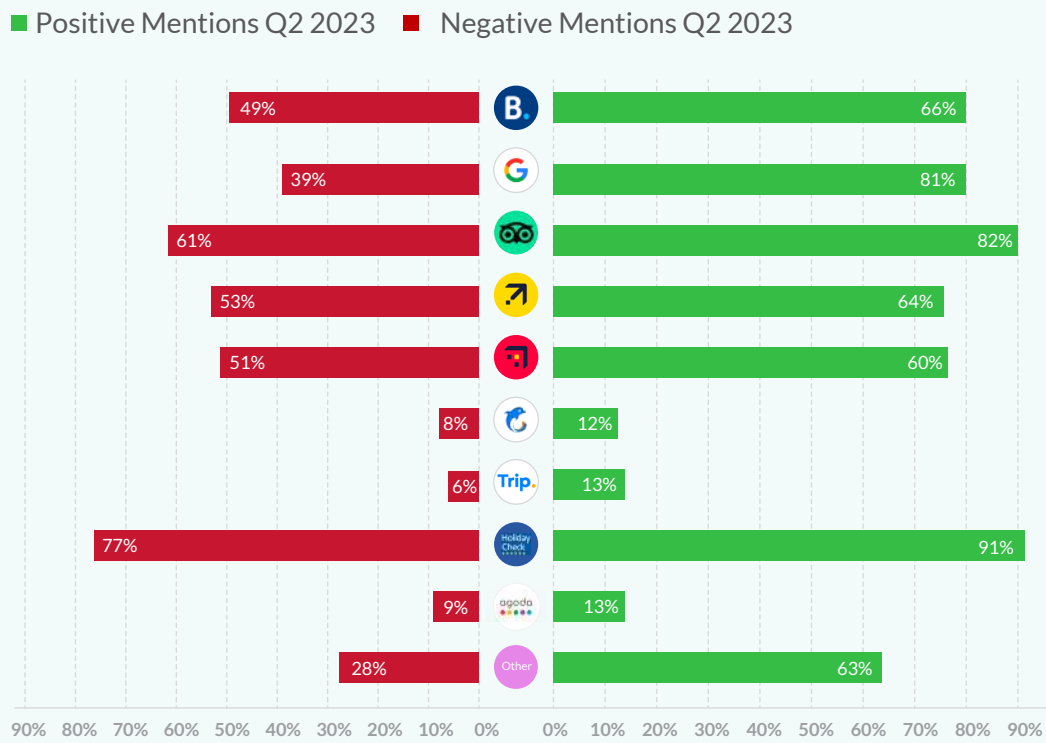
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Africa: Management Responses

Percentage of Positive and Negative Review Response, per Review Source

The percentage of negative and positive online guest reviews being replied to by hoteliers, per review source, in Q2 2023.



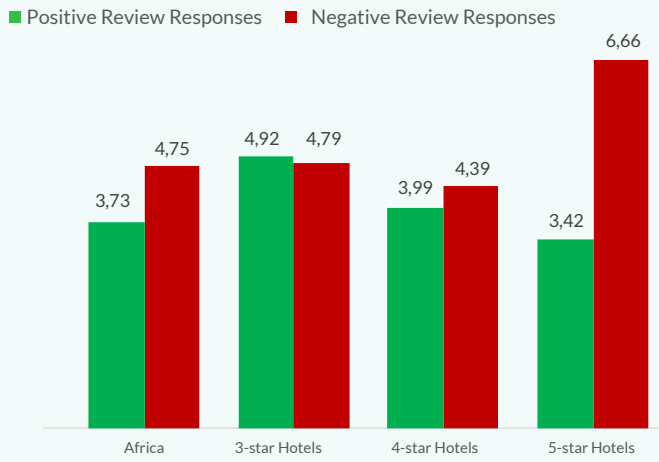
Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Africa: Management Responses

Review Response Times per Star Rating

The number of days it took hotels to respond to positive and negative responsible online guest reviews per star rating in Q2 2023.

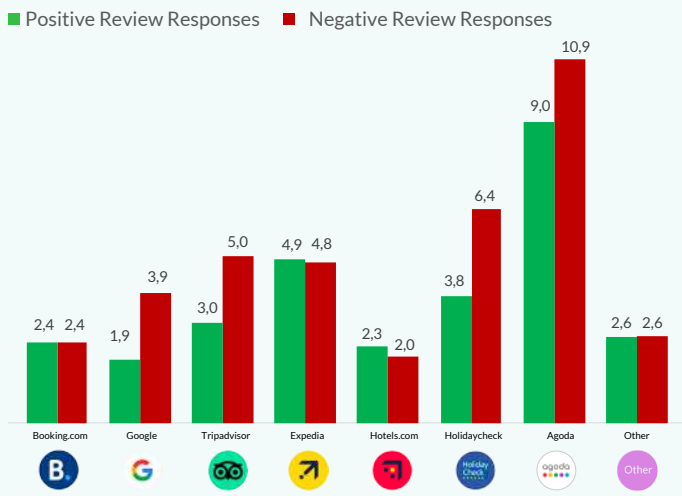


Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Review Response Times per Review Source

The number of days it took hotels to respond to positive and negative responsible online guest reviews per review source in Q2 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.

SOURCE
Shiji | REVIEWPRO

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

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	CAIRO	74.60%	1.2	68.40%	3.7
2	CAPE TOWN	82.70%	-0.5	70.20%	1.2
3	CASABLANCA	75.80%	0.9	67.30%	1.3
4	MARRAKECH	82.10%	0.9	68.20%	-4.6

4-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	CAIRO	84.90%	1.5	77.10%	6.4
2	CAPE TOWN	86.70%	-0.4	73.20%	2.1
3	CASABLANCA	75.60%	-1.4	66.50%	1.8
4	MARRAKECH	83.00%	1.2	74.00%	0.0

5-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	CAIRO	89,30%	2,2	78,10%	4,7
2	CAPE TOWN	92,00%	0,0	80,10%	2,7
3	CASABLANCA	84,80%	-1,5	77,80%	4,1
4	MARRAKECH	87,80%	-0,9	75,80%	-1,4

Africa: Cape Town City Hotel Ranking

New in this report, the City Hotel Rankings provide the Global Review Index scores for top-ranking hotels and serviced apartments in key cities around the world. The hotels are ranked by performance, and divided into 3-, 4-, and 5-star ratings for increased granularity. For more information, see the Methodology section near the end of the report.

Our congratulations go out to all who made the shortlists. The results are a testament to the continued hard work of thousands of hotels and millions of staff creating great guest experiences day after day.

3-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Tintage Guesthouse	96.1%	139
2	Sweet Orange Guest House	93.3%	100
3	The Country Guesthouse	88.3%	158
4	Krystal Beach Hotel	87.5%	738
5	Radisson RED Hotel V&A Waterfront Cape Town	86.7%	794
6	The Charles Guest House	86.3%	183
7	Spring Tide Inn	85.8%	120
8	Balmoral Lodge	84.8%	103
9	Protea Hotel by Marriott Cape Town Mowbray	84.4%	263
10	City Lodge Hotel Victoria And Alfred Waterfront	83.9%	239
11	Brenwin Guest House	83.6%	217
12	ONOMO Hotel Cape Town - Inn On The Square	83.0%	630
13	SunSquare Cape Town Gardens	82.6%	190
14	ANEW Hotel Green Point Cape Town	82.5%	415
15	Simon's Town Quayside Hotel	82.4%	422
16	Aquarius Luxury Suites	81.9%	150
17	Holiday Inn Express Cape Town City Centre	81.8%	743
18	61 On Camps Bay	81.0%	181
19	Protea Hotel by Marriott Cape Town Durbanville	80.9%	163
20	Protea Hotel by Marriott Cape Town Tyger Valley	80.0%	114

4-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	18 On Kloof Guest House	97.9%	139
2	Blackheath Lodge	95.8%	144
3	Hotel on the Promenade	94.8%	208
4	Rouge on Rose Boutique Hotel	94.8%	103
5	Dreamhouse Guesthouse	94.4%	151
6	Sundown Manor Guest House	93.7%	131
7	A Boat House	93.6%	114
8	Cape Heritage Hotel	92.5%	181
9	Ocean View House	92.4%	213
10	Vineyard Hotel	92.1%	531
11	Romney Park Luxury Apartments	91.6%	198
12	Berg en Zee Guesthouse	91.6%	112
13	Chartfield Guesthouse	91.3%	130
14	O' Two Hotel	90.9%	299
15	Head South Lodge	90.9%	115
16	3 On Camps Bay Boutique Hotel	90.7%	127
17	Villa Costa Rose	90.7%	112
18	Hotel Verde Cape Town Airport	90.1%	1697
19	Chapmans Peak Hotel	89.7%	244
20	The Villa Rosa	89.7%	195

5-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	POD Camps Bay	97.4%	136
2	Mount Nelson. A Belmond Hotel. Cape Town	97.2%	296
3	Tintswalo Atlantic	95.3%	123
4	The Glen Boutique Hotel & Spa	95.1%	165
5	Villa Coloniale Schumacher Luxury Retreat	95.0%	156
6	Cape Grace Hotel	94.6%	105
7	The Silo Hotel	94.3%	113
8	Alphen Boutique Hotel	93.9%	100
9	Zest Boutique Hotel by The Living Journey Collection	92.9%	165
10	Erinvale Estate Hotel and Spa	92.8%	155
11	The Cellars-Hohenort	92.6%	277
12	One&Only Cape Town	92.4%	298
13	The Tree House Boutique Hotel	92.3%	124
14	Dysart Boutique Hotel	91.9%	189
15	Cape Diem Lodge	91.9%	130
16	Steenberg Hotel	91.8%	116
17	South Beach Camps Bay Boutique Hotel	91.2%	182
18	Radisson Blu Hotel Waterfront. Cape Town	91.1%	590
19	Queen Victoria Hotel & Manor House	91.0%	133
20	The Westin Cape Town	90.7%	433



Guest Experience Benchmark

CHAPTER

11

NORTH AMERICA



North America: Market Overview

In the second quarter of this year, hotel occupancy in the U.S. was only 0.3% below the same period in 2022, whereas RevPAR was up by 2.5%, signalling a return to normalcy.¹ Meanwhile, the Canadian hotel industry reported its highest ADR and RevPAR on record in June and the highest occupancy level since August 2022.²

Hotel performance in North America normalized in Q2 2023

The region's Global Review Index was 84.4%

Expedia accounted for 19.4% of reviews, far higher than any other region

Value and Service Indexes were lower than in any other region

For our data set of hotels in North America, the Global Review Index was 84.4%, an increase of 1.4 points over the same quarter last year, although 1.1 points below the global GRI.

Review volume remained relatively flat, growing by 0.4% relative to Q2 2022. Volume from Booking.com was down by 10.5%, resulting in a market share loss of 4.1 points to 33.5%. Meanwhile, Google accounted for 25.0% of total reviews. In a break from patterns in other regions, Expedia had the third highest market share, at 19.4%, although its volume fell by 25.1% from Q2 2021 to Q2 2023.

Of the top five review sources, Hotels.com had the highest Source Index, at 86.1%, followed by Expedia at 85.6%. Tripadvisor had the lowest Source Index, at 79.0%, significantly lower than its global Source Index of 84.0%.

At 83.7%, the Service Index in North America was lower than in any other region and 4.2 points below the global average. The Value Index was even lower, at 79.1%, 5.1 points lower than the global average. In semantic analysis of review comments, the Room Category drove down the GRI by 3.6 points.

Hoteliers responded to 56.1% of reviews in the quarter, an increase of 5.0 points over Q2 2022 but 5.5 points lower than the global average.

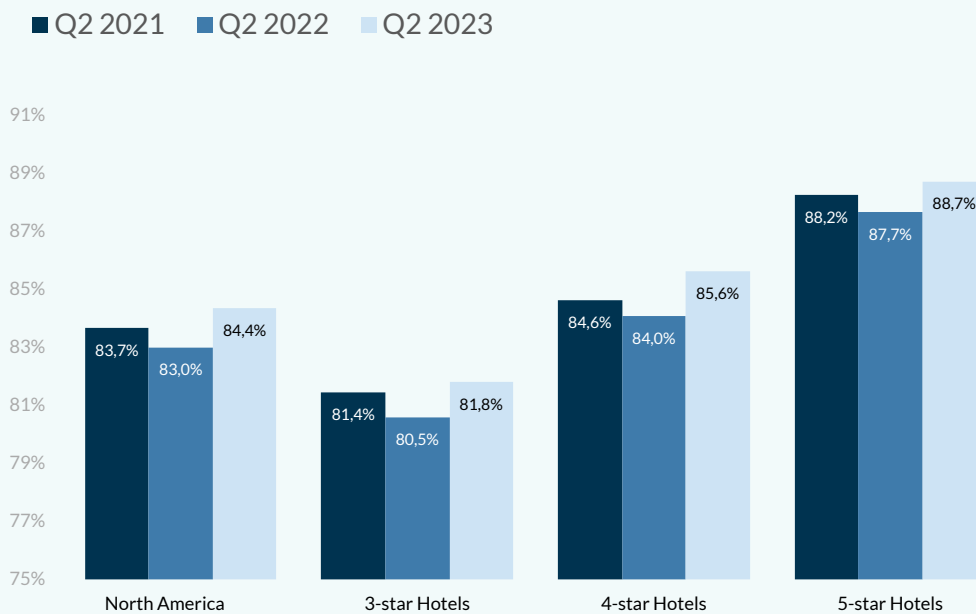
¹ STR. Baird/STR Hotel Stock Index grew 6.2% in June. July 2023.

² CoStar. Canada Hotel Average Daily Rate, Revenue per Available Room Reach All-Time High in June. July 2023.

North America: GRI Metrics

North America: Global Review Index™ (GRI)

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



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.

SOURCE



North America: Review Volume

Norht America: Volume of Reviews per Source

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



The Review volume collects reviews from 54 online review sites and Online Travel Agencies (OTAs), from a 9,500-hotel sample representing the six major geographical regions in the world.

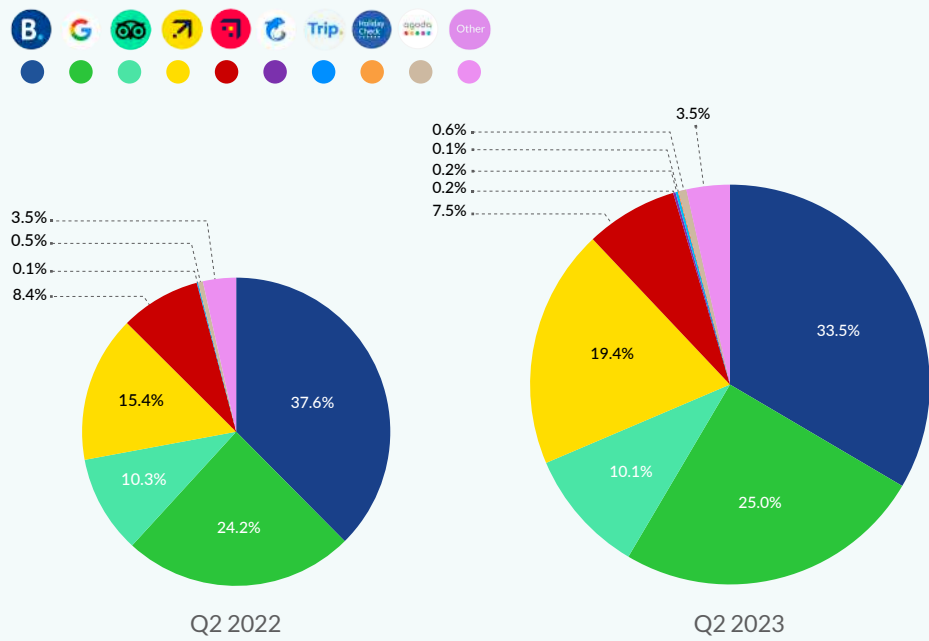
SOURCE



North America: Share of Reviews Per Source

North America: Share of Reviews 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.

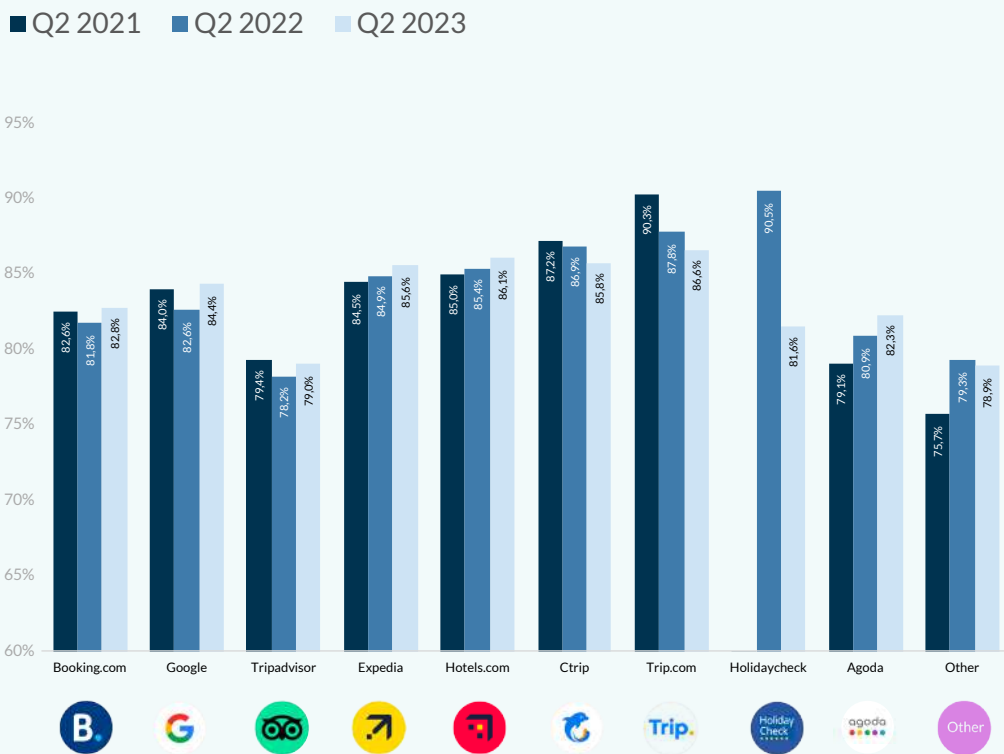
SOURCE
Shiji | REVIEWPRO

	BOOKING	GOOGLE	TRIPADVISOR	EXPEDIA	HOTELS.COM	CTRIP	TRIP.COM	HOLIDAY CHEK	AGODA	OTHER
2022	37.6%	24.2%	10.3%	15.4%	8.4%	0.0%	0.1%	0.0%	0.5%	3.5%
2023	33.5%	25.0%	10.1%	19.4%	7.5%	0.2%	0.2%	0.1%	0.6%	3.5%
Change Q2 22 vs Q2 23	-4.1	0.8	-0.2	4.0	-1.0	0.1	0.1	0.1	0.1	0.0

North America: Review Source Indexes

North America: Review Source Indexes

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



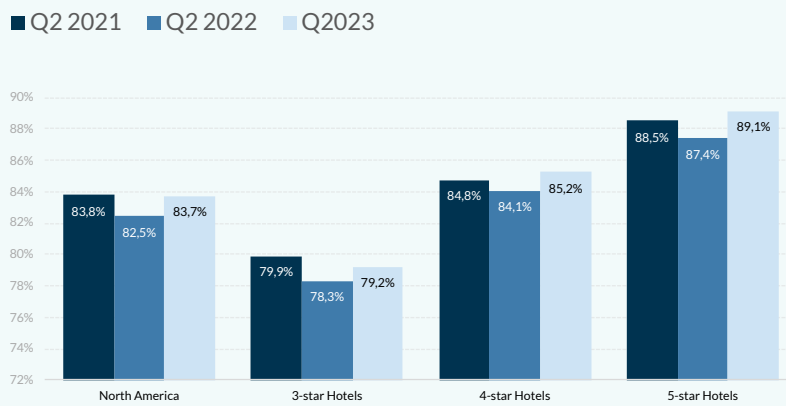
A measure of review scores by review source derived from Shiji ReviewPro's proprietary algorithm, derived from a 9,500-hotel sample representing the six major geographical regions in the world.

SOURCE

North America: Department Indexes

North America: Service

Individual department index scores, a three-year comparison.



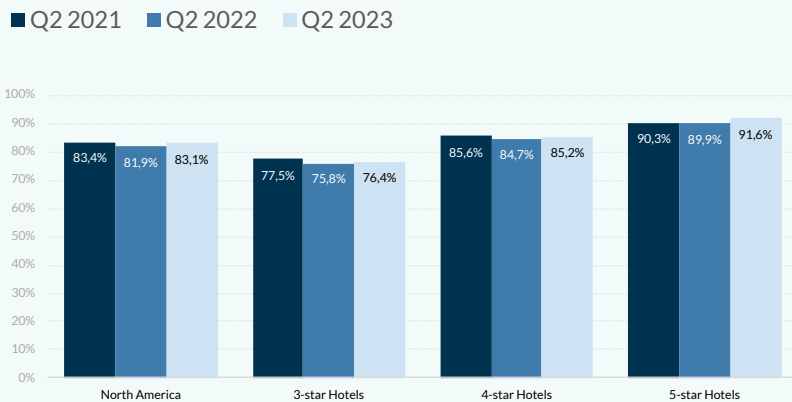
A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



North America: Room

Individual department index scores, a three-year comparison.



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE

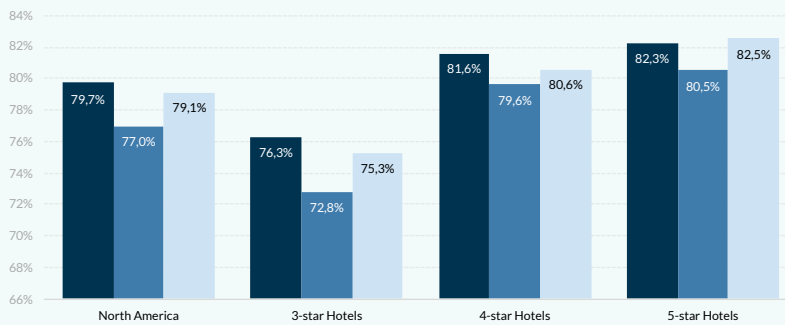


North America: Department Indexes

North America: Value

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



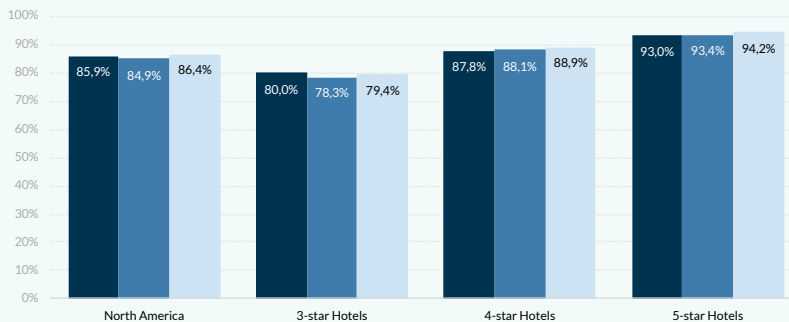
A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE
Shiji | REVIEWPRO

North America: Cleanliness

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

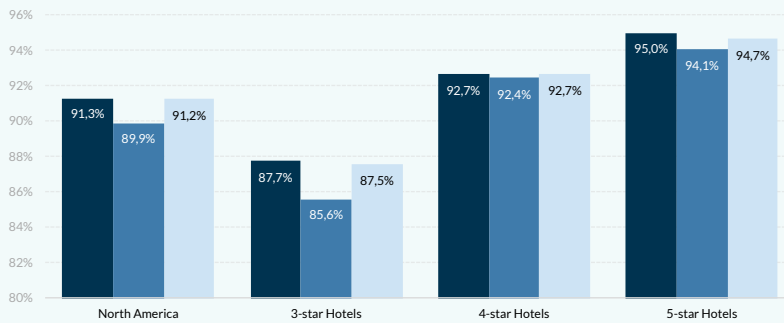
SOURCE
Shiji | REVIEWPRO

North America: Department Indexes

North America: Location

Individual department index scores, a three-year comparison.

■ Q2 2021 ■ Q2 2022 ■ Q2 2023



A hotel department's performance can be measured according to online guest review data using a department index algorithm. The data is collected from a 9,500-hotel data set representing the six major global regions.

SOURCE



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 Q2 2023.

CATEGORY	POSITIVE	CATEGORY	NEGATIVE
EXPERIENCE	1.0	ROOM	-3.6
STAFF	0.8	CLEANLINESS	-2.4
FOOD & DRINKS	0.5	ESTABLISHMENT	-2.0
CLEANLINESS	0.5	VALUE	-1.9
LOCATION	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.

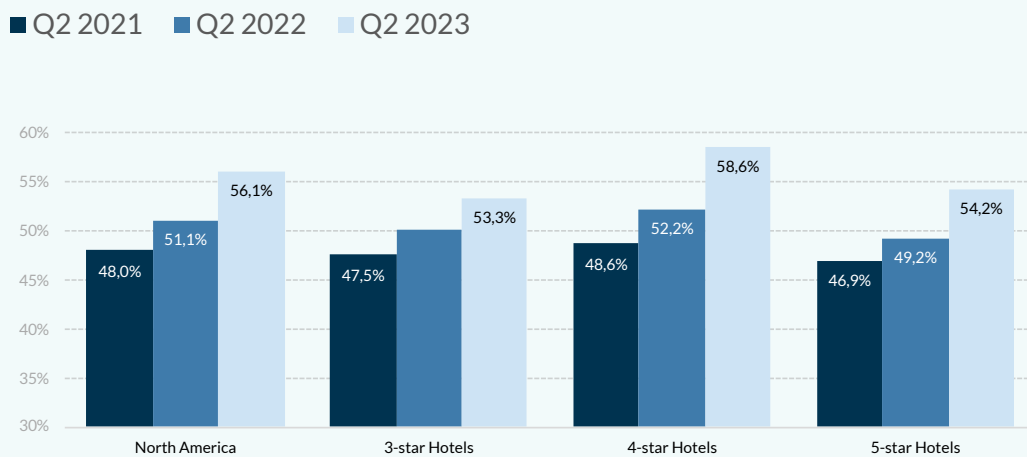
SOURCE



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.



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.

SOURCE

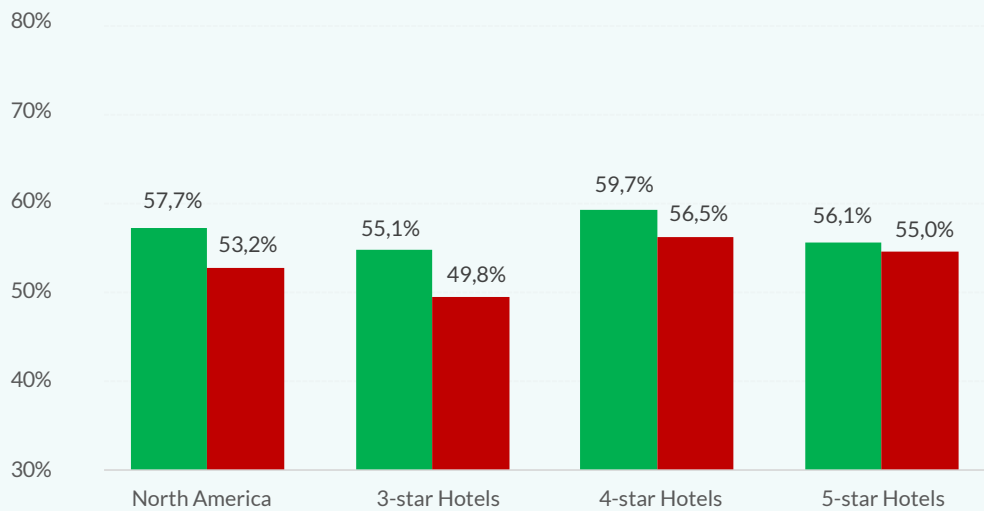


North America: Management Responses

Percentage of Positive and Negative Review Response, per Star Category

The percentage of negative and positive online guest reviews being replied to by hoteliers in Q2 2023.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

SOURCE

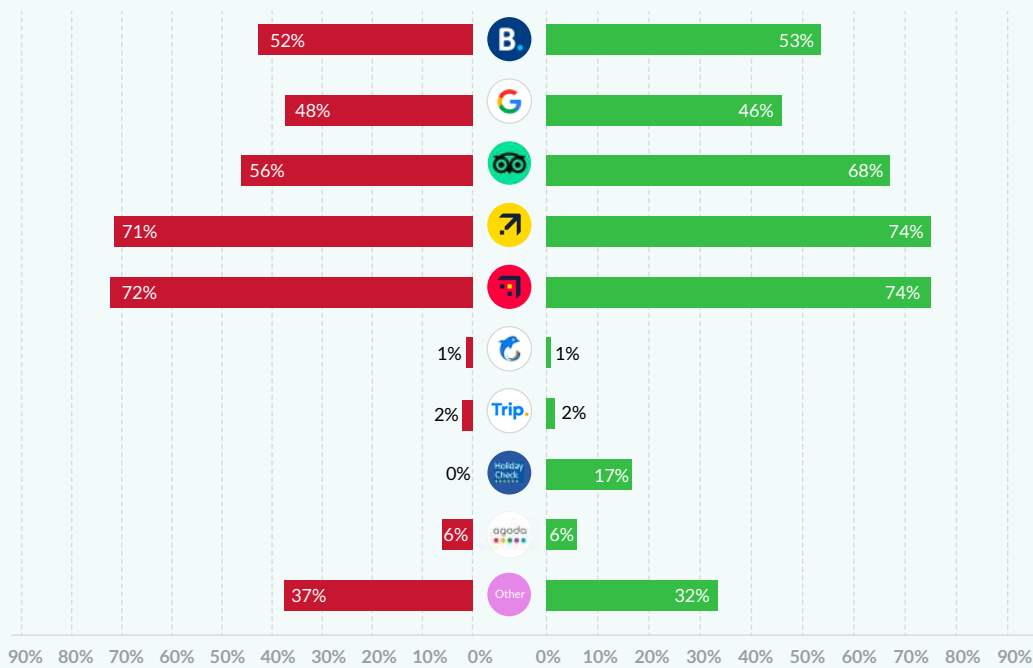


North America: Management Responses

Percentage of Positive and Negative Review Response, per Review Source

The percentage of negative and positive online guest reviews being replied to by hoteliers, per review source, in Q2 2023.

■ Positive Mentions Q2 2023 ■ Negative Mentions Q2 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.

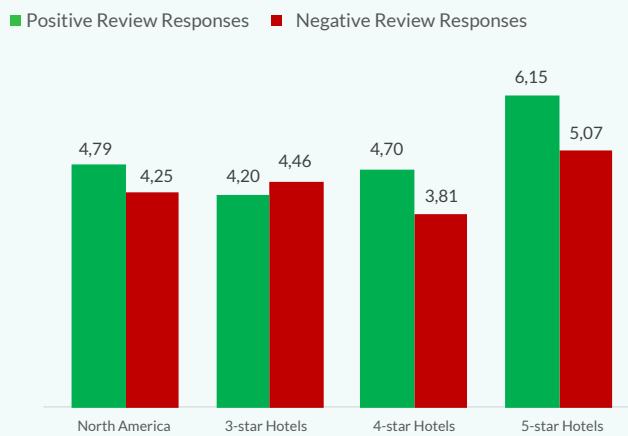
SOURCE



North America: Management Responses

Review Response Times per Star Rating

The number of days it took hotels to respond to positive and negative responsible online guest reviews per star rating in Q2 2023.

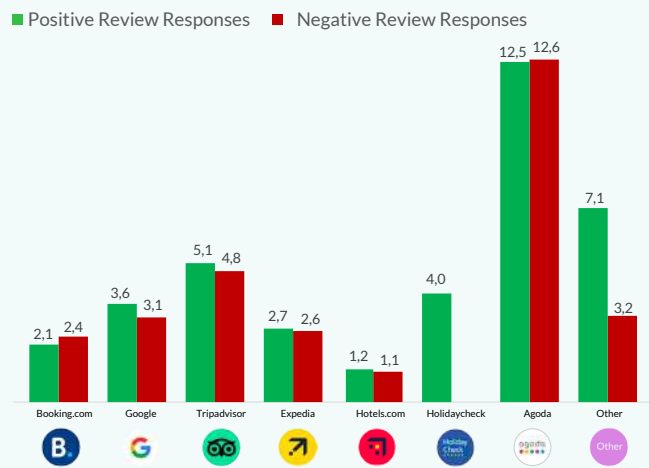


Management response rate is a key metric when understanding hotels' commitment to guest experience management, setting correct and clear KPIs within the organisation, and supporting a solid revenue management strategy.

SOURCE
Shiji | REVIEWPRO

Review Response Times per Review Source

The number of days it took hotels to respond to positive and negative responsible online guest reviews per review source in Q2 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.

SOURCE
Shiji | REVIEWPRO

North America: City Benchmark

Here we have selected 10 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

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	CHICAGO	80.30%	0.7	68.30%	1.0
2	HONOLULU	80.10%	-0.4	66.90%	0.8
3	LAS VEGAS	80.60%	-1.0	53.80%	0.2
4	LOS ANGELES	78.10%	0.9	59.60%	1.9
5	MIAMI	76.80%	3.5	61.10%	4.7
6	MONTREAL	80.30%	1.4	66.50%	5.1
7	NEW YORK	77.40%	0.2	65.00%	3.4
8	SAN FRANCISCO	82.20%	-1.2	71.30%	1.9
9	TORONTO	78.90%	2.2	63.10%	4.6
10	VANCOUVER	81.60%	1.3	68.50%	3.3

CHAPTER 11



North America: City Benchmark

Here we have selected 10 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.

4-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	CHICAGO	81.40%	2.0	66.10%	2.7
2	HONOLULU	85.90%	1.7	70.30%	3.2
3	LAS VEGAS	85.60%	0.3	70.70%	1.1
4	LOS ANGELES	81.00%	-0.3	57.20%	-0.5
5	MIAMI	82.90%	1.3	66.10%	3.0
6	MONTREAL	86.10%	1.1	72.90%	2.9
7	NEW YORK	82.60%	1.2	67.10%	3.4
8	SAN FRANCISCO	85.40%	0.9	72.80%	2.5
9	TORONTO	85.50%	1.4	68.90%	3.6
10	VANCOUVER	86.70%	1.0	76.50%	2.2

North America: City Benchmark

Here we have selected 10 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.

5-STAR HOTELS

	City	Q1+Q2 2023 GRI™	Change (Q1+Q2 2022)	Positive Mentions %	Change
1	CHICAGO	91.10%	0.9	82.30%	2.0
2	HONOLULU	88.60%	-1.0	67.90%	-4.0
3	LAS VEGAS	87.50%	0.2	68.50%	-0.1
4	LOS ANGELES	87.80%	4.6	75.50%	9.2
5	MIAMI	85.00%	2.8	71.30%	4.5
6	MONTREAL	92.10%	3.2	74.40%	4.1
7	NEW YORK	87.30%	0.8	74.60%	2.6
8	SAN FRANCISCO	89.60%	-0.1	75.50%	3.9
9	TORONTO	91.40%	1.5	83.00%	4.0
10	VANCOUVER	89.20%	0.8	74.50%	2.4

CHAPTER 11



North America: New York City Hotel Ranking

New in this report, the City Hotel Rankings provide the Global Review Index scores for top-ranking hotels and serviced apartments in key cities around the world. The hotels are ranked by performance, and divided into 3-, 4-, and 5-star ratings for increased granularity. For more information, see the Methodology section near the end of the report.

Our congratulations go out to all who made the shortlists. The results are a testament to the continued hard work of thousands of hotels and millions of staff creating great guest experiences day after day.

3-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Residence Inn by Marriott New York Manhattan/Midtown East	91.5%	439
2	Broadway Plaza Hotel	90.6%	441
3	AC Hotel by Marriott New York Times Square	88.9%	417
4	Radio City Apartments	88.4%	1510
5	Hotel Indigo NYC Financial District. an IHG Hotel	88.4%	586
6	Hotel Mimosa	88.3%	255
7	Residence Inn New York Downtown Manhattan/World Trade Center Area	88.2%	449
8	Best Western Plus Soho Hotel	88.2%	378
9	Best Western Premier Empire State Hotel	88.1%	509
10	Opera House Hotel	87.8%	493
11	Hotel Mulberry	87.8%	246
12	Hilton Garden Inn New York West 35th	87.0%	869
13	Homewood Suites Midtown Manhattan Times Square South	86.9%	1114
14	Hampton Inn Brooklyn Downtown	86.6%	677
15	Pod Times Square	86.2%	5470
16	Pod 39	86.2%	2780
17	3 West Club	86.2%	120
18	Hampton Inn Manhattan/Times Square Central	86.1%	1128
19	The Draper New York. Tapestry Collection by Hilton	86.1%	680
20	Residence Inn New York Manhattan/Central Park	86.0%	830

4-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	Casablanca Hotel by Library Hotel Collection	95.8%	322
2	The Kimberly Hotel	95.0%	510
3	Bryant Park Hotel	94.8%	504
4	Library Hotel by Library Hotel Collection	94.2%	187
5	Mint House at 70 Pine	94.0%	334
6	LUMA Hotel Times Square	93.6%	1555
7	Hilton Club The Central at 5th New York	93.5%	299
8	The Ludlow Hotel	93.1%	362
9	NobleDEN Hotel	93.0%	630
10	Artezen Hotel	92.7%	471
11	Park Terrace Hotel on Bryant Park	92.4%	1029
12	Hotel Giraffe by Library Hotel Collection	92.4%	157
13	West 57th Street by Hilton Club	92.3%	159
14	INNSIDE by Meliá New York Nomad	92.1%	1028
15	Soho House New York	91.9%	140
16	CIVILIAN Hotel	91.8%	1478
17	Hotel Scherman	91.7%	440
18	Chambers Hotel	91.7%	311
19	Crowne Plaza HY36 Midtown Manhattan. an IHG Hotel	91.4%	721
20	Wythe Hotel	91.4%	105

5-STAR HOTELS

	Hotel	Q1+Q2 2023 GRI™	Review Volume
1	The Wallace	97.0%	652
2	Pendry Manhattan West	96.8%	192
3	The Wall Street Hotel	95.8%	325
4	The Langham. New York. Fifth Avenue	95.0%	328
5	Conrad New York Downtown	93.4%	511
6	Trump International Hotel & Tower New York	93.3%	296
7	ModernHaus SoHo	92.6%	330
8	Hard Rock Hotel New York	92.5%	1543
9	The Plaza	92.3%	460
10	The Carlyle. A Rosewood Hotel	91.9%	179
11	The Mercer	91.6%	134
12	The Beekman A Thompson Hotel	91.1%	303
13	Refinery Hotel	91.0%	464
14	1 Hotel Central Park	90.5%	368
15	The Peninsula New York	90.2%	282
16	Four Seasons Hotel New York Downtown	90.0%	118
17	Park Hyatt New York	89.6%	150
18	The Ritz-Carlton New York. NoMad	89.4%	143
19	Motto By Hilton New York City Chelsea	89.3%	1379
20	The Dominick Hotel	89.2%	514



Guest Experience Benchmark

CHAPTER

12

REPUTATION STRATEGIES

10 WAYS TO IMPROVE REPUTATION IN 2023

1 BUDGET FOR A STRONGER REPUTATION

6 UPGRADE YOUR ROOMS

2 IF YOU CAN'T EXCEED EXPECTATIONS, MANAGE THEM

7 IMPROVE ROOM INVENTORY MANAGEMENT

3 EASE STAFFING SHORTAGES WITH AUTOMATION

8 USE TECHNOLOGY TO OVERCOME F&B CHALLENGES

4 PRIORITISE FAIRNESS IN PRICING

9 CATER TO HYBRID TRAVELLERS

5 IMPROVE THE PAYMENT EXPERIENCE

10 GET REPUTATION SOFTWARE WORKING FOR YOU

10 WAYS TO IMPROVE REPUTATION IN 2023

01. BUDGET FOR A STRONGER REPUTATION

This report lands during budget season, the opportune time to plan for the changes needed to boost reputation in 2024. Data from this report combined with your hotel's review data will provide valuable insights to guide 2024 planning and spending. That may

mean requesting a capex reserve to upgrade tired rooms, scheduling service recovery training for staff, or committing to a long-needed PMS upgrade. If you don't budget for it, you can't spend it, and that will impact reputation.

02. IF YOU CAN'T EXCEED EXPECTATIONS, MANAGE THEM

Exceeding guest expectations is the best way to earn five-star reviews, but in this time of staffing shortages and scaled-back services it may not always be practical. Consider focusing on managing guest expectations. To prevent unpleasant surprises, communication is key.

If there are changes to services or hours, be fastidious about messaging guests in advance and updating your website, confirmation letters, and listings. The ultimate flex? Set realistic expectations, then exceed them.

10 WAYS TO IMPROVE REPUTATION IN 2023

03. EASE STAFFING SHORTAGES WITH AUTOMATION

It's safe to say that the brief window during the pandemic when travellers were empathetic about staffing shortages is now closed. Guests are back to expecting their needs to be taken care of as efficiently as possible. Problem is, the labour crisis is still

here. The objective now is to conceal staffing issues so that guests are unaffected. One of the most effective ways? Help guests help themselves with self-serve apps like mobile check-in, keyless entry, and digital food ordering.

04. PRIORITISE FAIRNESS IN PRICING

In Q2 2023, 40.7% of mentions of value in review comments were negative. Research has found that when shoppers perceive a price as fair, it activates the part of the brain linked with pleasure. If they perceive a price as unfair, it activates the part of the brain that

registers pain, which can lead to complaints and bad reviews.¹ Hotels would be wise to monitor value ratings, comments, and overall reputation closely for signs that prices have reached a ceiling and reputation is suffering.

05. IMPROVE THE PAYMENT EXPERIENCE

Digging deeper into review comments regarding value, we find that the issue isn't always pricing. While "price" received almost 24,000 negative mentions in Q2 2023, "payment" received close to 25,000 and "bill" received almost 15,000. The mishandling of

payments is hurting hotel reputation. A modern, centralised payment solution integrated with the PMS and POS will help hotels prevent issues and provide guests with a seamless payment experience across the property.

¹ Psychology Today. The Price of Products Guides Consumer Expectations. May 2023

10 WAYS TO IMPROVE REPUTATION IN 2023

06. UPGRADE YOUR ROOMS

The Room Index fell 1.4 points in Q2 2023 and dragged down the Global Review Index by 1.8 points. But it's not just cleanliness issues, which drove down the GRI by 1.2 points. In review comments, 59.2% of mentions of bathrooms and 35.2% of mentions of beds

were negative. The top complaints were related to air conditioning, doors, and carpeting. Filter your own reviews and see what guests are saying about your rooms. Then build a plan for fixing the problems.

07. IMPROVE ROOM INVENTORY MANAGEMENT

Improving room ratings isn't just about quality, it's also about managing room inventory effectively. Overselling, relocates, and downgrades are a fast-track to negative reviews, whereas complimentary upgrades often result in rave reviews. In fact, "upgrade"

generated over 17,000 positive mentions in Q2 2023. But you don't always have to give it away. Upselling helps hotels sell premium rooms, generates incremental revenue, and enhances the guest experience – a win-win for all.

08. USE TECHNOLOGY TO OVERCOME F&B CHALLENGES

In Q2 2023, the Food & Drinks category drove down the GRI by 1.1 points. In F&B departments, costs have skyrocketed, the staffing crisis is more acute, and profitability is down. Many hotels are turning to technology for solutions. This may mean upgrading to a cloud-based, mobile POS, offering self-

serve food ordering, or using software to manage reservations, inventory, and kitchen operations. Plan carefully, though. In Q2 2023, 61.5% of mentions of technology were negative.

10 WAYS TO IMPROVE REPUTATION IN 2023

09. CATER TO HYBRID TRAVELLERS

Business or pleasure? More and more these days, the answer is both. As business travel gains momentum, the line between leisure and corporate guests is blurring. More travellers are working remotely and combining business and pleasure on the same trip. Even resorts

whose primary market is leisure travellers must get better at serving both types of guests. This may mean offering business-friendly workspaces and facilities, meeting places, and special pricing for extended stays.

10. GET REPUTATION SOFTWARE WORKING FOR YOU

Recognise that you can't manage reputation on spreadsheets. Key to improving reputation is automating the tracking, analysis, and benchmarking reviews. According to Skift, 57% of hotels worldwide still don't subscribe to a reputation management system.¹ If

you're one of them, you're at a disadvantage. If you do have a reputation solution, are staff using it to its full potential? Just imagine, with the right ORM tool you could produce a report like this one for your property or group.

Want to know more about your online reputation?

TALK TO US



Guest Experience Benchmark

CHAPTER

13

METHODOLOGY

Methodology

Data in the Global and Regional sections of this report was drawn from a sample set of 9,500 hotels representing six major geographical regions in the world.

Period

Reviews were posted between April 1, 2023, and June 30, 2023, and compared to the same periods in 2021 and 2022.

Data Freeze

Data was collected on July 7, 2023. Responses posted after this date were not included in the data set.

Data Set

9,500

Hotels

3,008,810

Reviews

9,070,604

Mentions in Review Comments

Regions



Asia Pacific
(1,900 hotels)



Europe
(1,900 hotels)



Latin America &
Caribbean
(1,900 hotels)



Middle East
(900 hotels)



Africa
(1,000 hotels)



North America
(1,900 hotels)

Sources



Reviews were collected from 55 review sites and online travel agencies (OTAs) in 62 languages.

Star Rating Segment

- 3-star: 3,418 hotels
- 4-star: 3,442 hotels
- 5-star: 2,640 hotels

Methodology

Countries

ASIA PACIFIC	EUROPE	LATIN AMERICA & CARIBBEAN	MIDDLE EAST	AFRICA	NORTH AMERICA
Australia	Croatia	Argentina	Bahrain	Algeria	Canada
China	Czech Republic	Anguila	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	Guadelupe			
	United Kingdom	Guatemala			
		Jamaica			
		Mexico			
		Peru			
		Puerto Rico			
		Saint Lucia			
		Trinidad and Tobago			
		Turks and Calcos			
		Uruguay			
		Virgin Islands (U.S.)			

Methodology

City Data & Rankings

Unlike in the Global and Regional sections, data in the City Benchmark and City Hotel Rankings tables covers a two-quarter period, from January 1 to June 30, 2023.

The City Benchmark is displayed in alphabetical order rather than ranked by GRI. Variances in the number of hotels, types of hotels, and proportions among star categories across cities render comparisons across cities less relevant. Rather, the listings are intended to be used as a benchmark for hotels within each city.

To qualify for City Hotel Rankings, hotels must have received at least 100 online reviews in the two-quarter period. Aparthotels were also 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 resource for star categories.

The 20 properties with the highest GRI in each star category are featured in the City Hotel Rankings for each city featured in the report. The total data set for City Hotel Rankings was 5,842. Additional cities will be added in future reports.

Glossary

City Data & Rankings

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 involve 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.

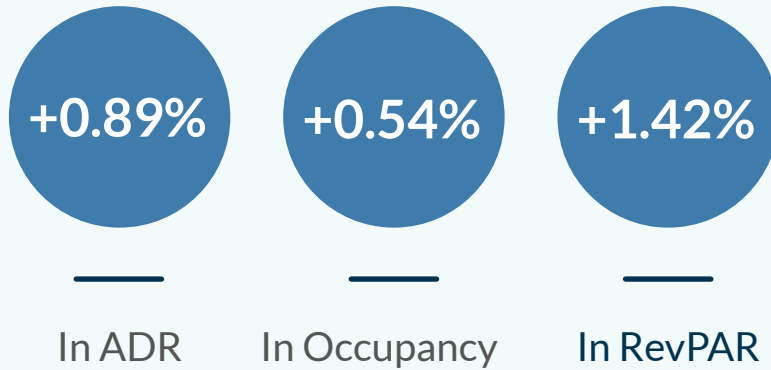
Responsible Reviews. Reviews from sources that permit management responses. Ratings-only reviews are not included in the calculations.

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:



Cornell University
School of Hotel Administration
The Center for Hospitality Research





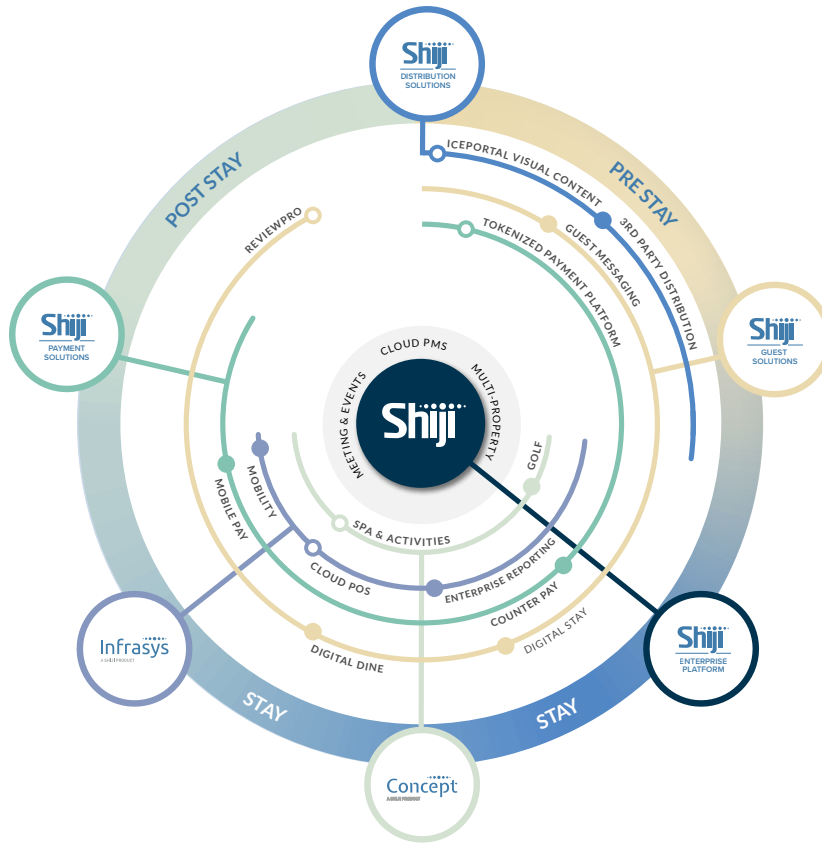
Guest Experience Benchmark

CHAPTER

14

ABOUT SHIJI REVIEWPRO

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: Navigating an Uncertain Future

Looking ahead to future months, mixed outlooks from economists make it difficult to predict future hotel performance. A recession has been anticipated and failed to materialise for so long it is being wryly referred to as a “rolling recession.” Recently, the International Monetary Fund (IMF) raised its forecast for global growth in 2023 and 2024 to 3.0%, suggesting that a global recession might be avoided after all, although it cautioned that the global economy is still weak by historical standards.¹

For the hotel industry, continued economic growth promises to bring more international travellers, business travellers, groups, and conventions, although a full recovery in these segments is not expected before 2024. At the same time, a softening in new hotel developments may create higher compression in some destinations. All of this may propel further rate growth to help offset higher operating costs. And yet increasing price sensitivity among travellers may test the limits of hotel rates and put hotels under even greater scrutiny in terms of value, quality, and service levels.

While hoteliers are eager to put the pandemic era behind them once and for all, many of the problems it produced, chiefly inflation and staffing shortages, continue to linger. Moreover, the travel industry is facing growing uncertainty related to climate change. This summer, record-high temperatures in Europe, North America, and Asia have resulted in raging wildfires, droughts, and torrential monsoons. Going forward, weather patterns and sustainability will play an increasing role in traveller decisions.

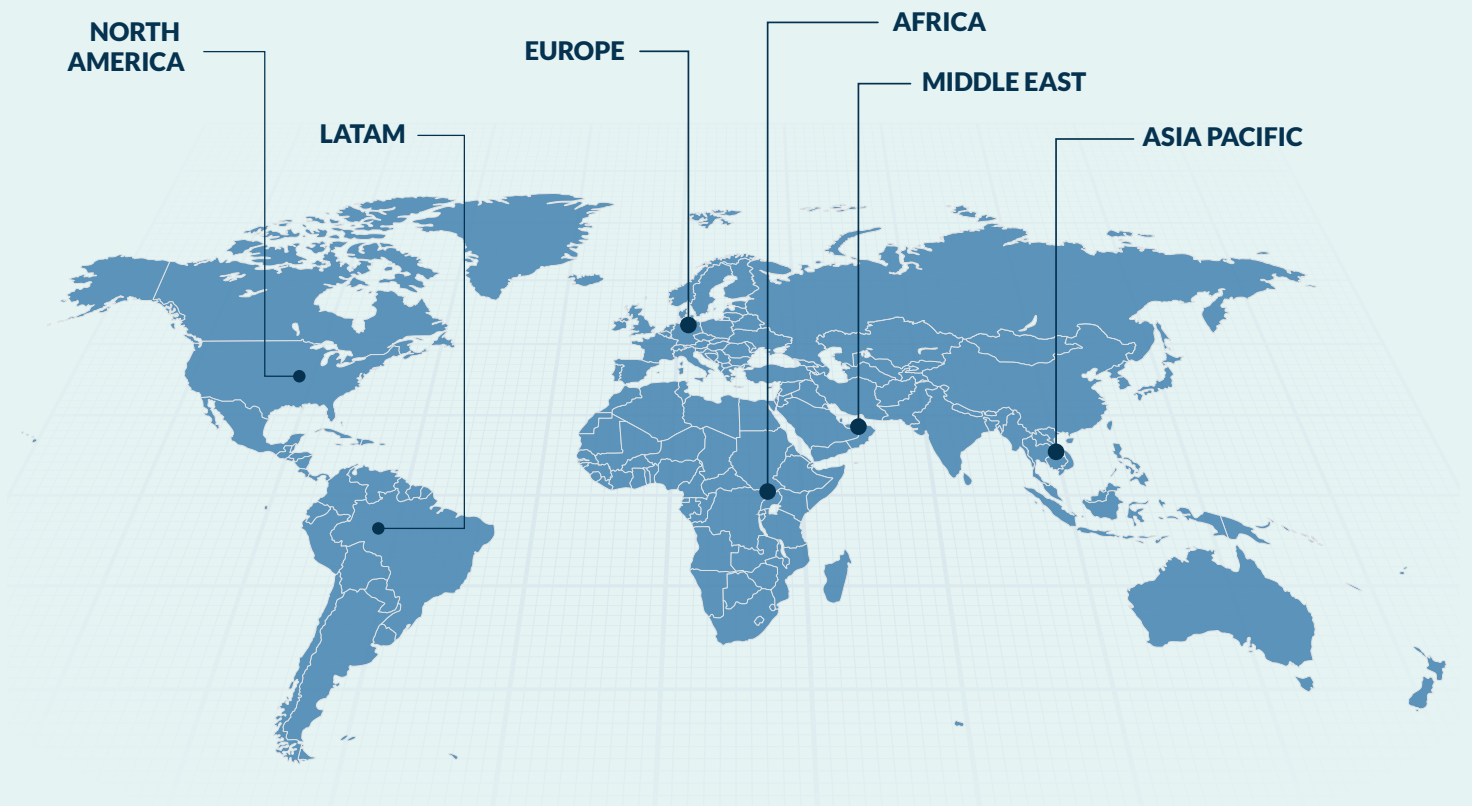
To navigate these threats and any new obstacles that come their way, hoteliers will need to demonstrate continued resilience and dedication to upholding high standards of quality, service, and value. We look forward to reporting the results in the next edition of the Guest Experience Benchmark.

¹ International Monetary Fund. World Economic Outlook Update. July 2023.

Want to know more about your
online reputation?

TALK TO US

reviewpro.shijigroup.com



Guest Experience Benchmark

We are happy to provide data references and information on any of the global or regional sections in this report. Please request a meeting with our team so we can understand your needs and requirements.

[REQUEST A MEETING](#)



Guest Experience Benchmark

Q₂
2023

The Definitive Report on Guest
Experience Benchmarking.