

A glowing yellow rectangular sign with ornate black metal scrollwork and gold-colored accents, hanging from a building. The word "HOTEL" is written in large, green, serif capital letters on the sign.

HOTEL

Hotel Reviews:

How Guests Rate Their Experiences in European Hotels

FOREWORD

THE IMPORTANCE OF GUEST REVIEWS

Since the Internet revolution gained momentum around the turn of the century, the hospitality sector has gone through an enormous evolution. The change the industry has gone through in the past 15 years has been greater than the 150 years before that.

Major brands have diversified and are now conglomerates operating on large loyalty platforms and CRM systems; Location is no longer the sole driver for hotel development, and Experience has become a major decision making factor for consumers.

The hotel industry needs more than ever to take customers seriously. Where in the past hoteliers would strive to offer the best service to consumers, today that is no longer enough. Online Travel Agencies (OTAs) have largely conquered the online booking world and consumers are now able to make their opinion known, almost instantly. These customer reviews have become a major deciding factor for prospective guests when booking a hotel.

Revinate is the global leader in analyzing and reporting customer experiences and Colliers International Hotels is a global leader in hotel advisory services. Colliers International Hotels recognizes the importance of customer opinions to hotel owners and realizes that this information has become a major value driver in the hotel industry. Hence, we appreciate our partnership.

For this report, we analysed more than 4.7 million reviews for 4,641 hotels across Europe. The report provides a brief overview and analysis of key hotel markets across Europe, from the perspective of the customer.

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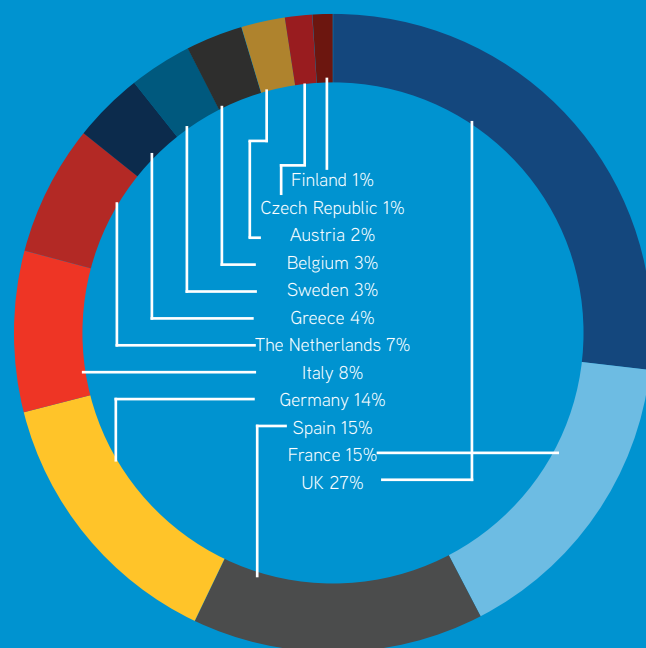
REVIEW VOLUMES – THE BIG FOUR DOMINATE

In terms of the volume of reviews by market, there are no major surprises as the distribution of reviews simply reflects the size of each country's respective hotel industry.

Europe's tier one travel destinations - the UK and Germany for business, and France and Spain for leisure - dominate the number of reviews undertaken by country, accounting for just over seventy percent of all reviews in 2015.

Next inline come Italy and the Netherlands, which account for a further fifteen percent of reviews. These markets are then followed by countries with a smaller number of reviews including Greece, Sweden, Belgium, Austria, the Czech Republic and Finland.

Fig. 1: Distribution of Reviews by Country



Source: Revinate & Colliers International

REVIEW SUCCESS RATINGS

SIZE DOESN'T MATTER

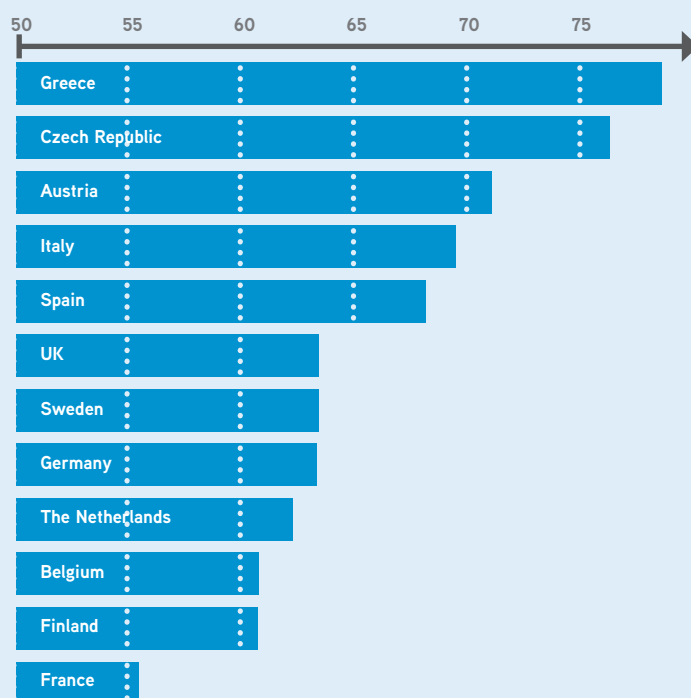
When it comes to the overall positive ranking of hotels reviewed by country - in terms of the volume of reviews - the size of the market doesn't seem to matter. The countries with the highest overall positive scores are not necessarily those markets with the highest volume of reviews.

Greece and the Czech Republic are the best scoring countries in terms of gaining positive reviews, with a positive rating of over 70%.

Austria, Italy and Spain are not too far behind, maintain positive reviews above the 63% average watershed. Just below the market average come the big hitters of the UK and Germany alongside Sweden and the Netherlands, before the positive ratings drop off a little further in Belgium and Finland. France comes in last place, with only 55% of reviews being of a positive nature.

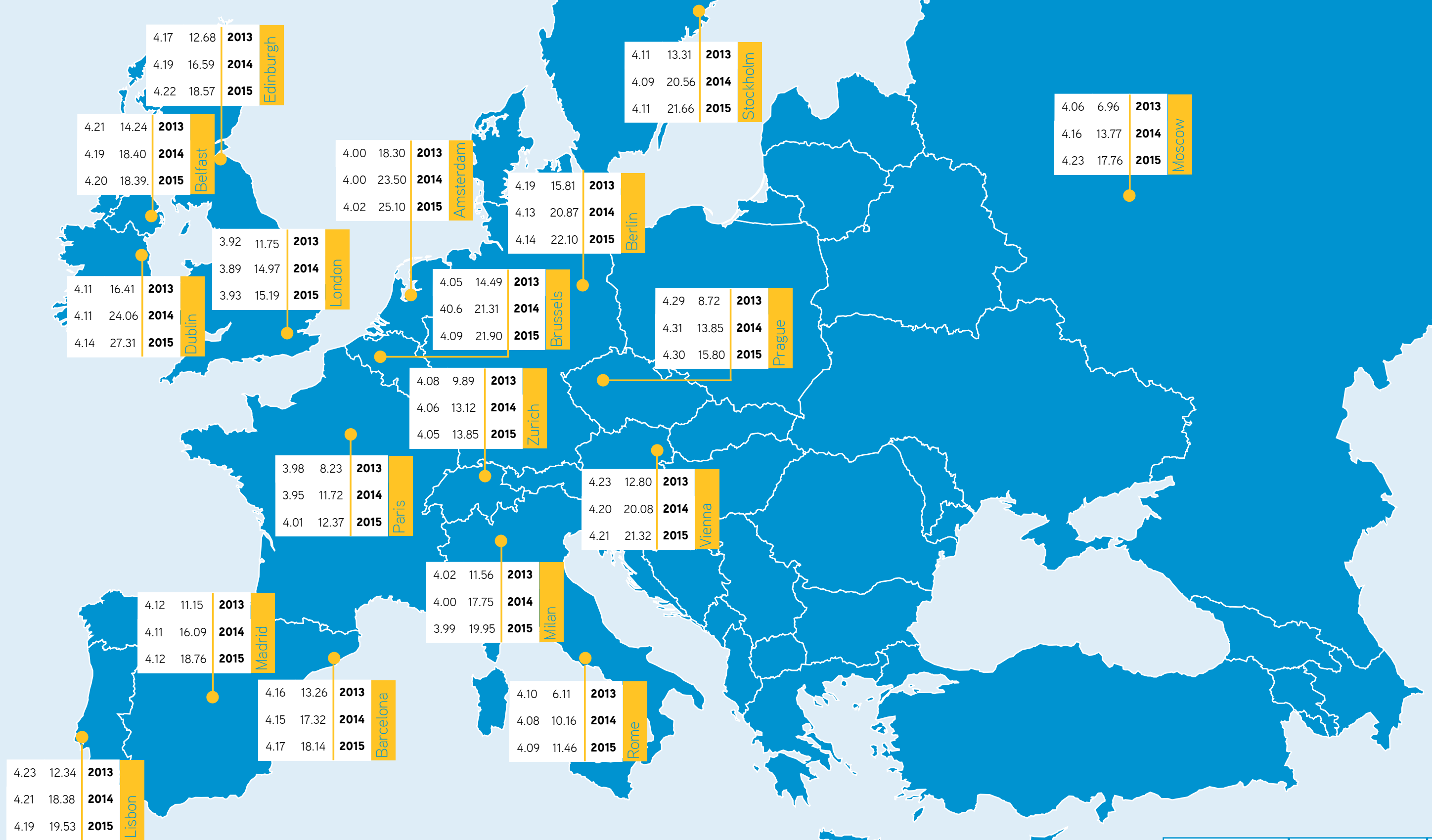
While Greece, the Czech Republic, Austria, Italy and Spain may well be benefitting from a higher proportion of leisure/ holiday travel putting customers in a better mood, the same should be said of France. Such a low positive ratings score suggests France has some work to do across its hotel industry, to improve on customer ratings.

Fig. 2: Review Success Ratings by Country [%]



Source: Revinate & Colliers International

MAP



Source: Revinate & Colliers International

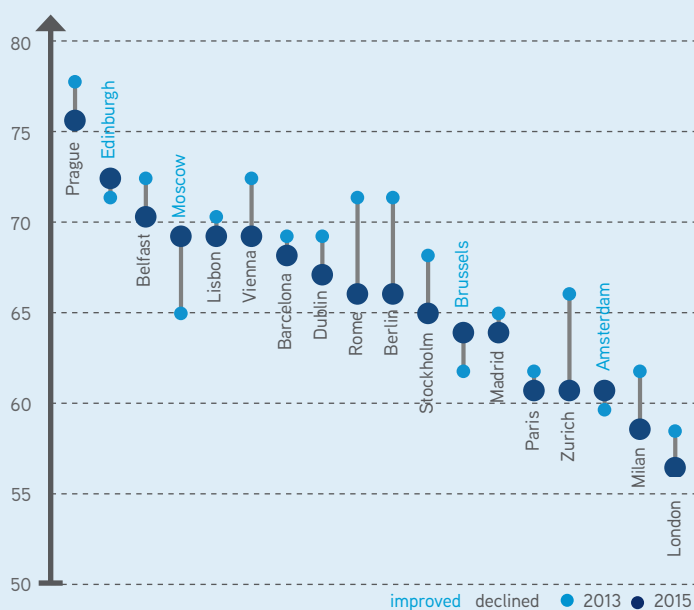
Legend:	Overall Review Rating	Review Pace (reviews/week/property)	Year
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CITY BY CITY

A review of city-specific ratings suggest the low French rating is driven by locations outside of Paris. Paris has a relatively high overall positive rating of 61%, which has remained stable since 2013. London, however, has a much lower overall positive rating compared to its national average - only 57% of reviews in the UK capital being of a positive nature. This is almost the reversal of the French/Paris relationship. Edinburgh on the other hand boasts very positive reviews of 72%.

Elsewhere, there is quite a narrow range in terms of the positive review ratings. Prague is at the top of the ranking tree at 75%, very much in-line with the national average. Of more interest is the fact that of the 18 cities reviewed, only five have noted an improvement in ratings since 2013: Amsterdam, Brussels, Edinburgh, and Moscow. Conversely, the positive ratings for Berlin, Rome and Zurich have declined the most, by up to 5%.

Fig. 3: City Review: Positive Ratings 2013-2015 [%]

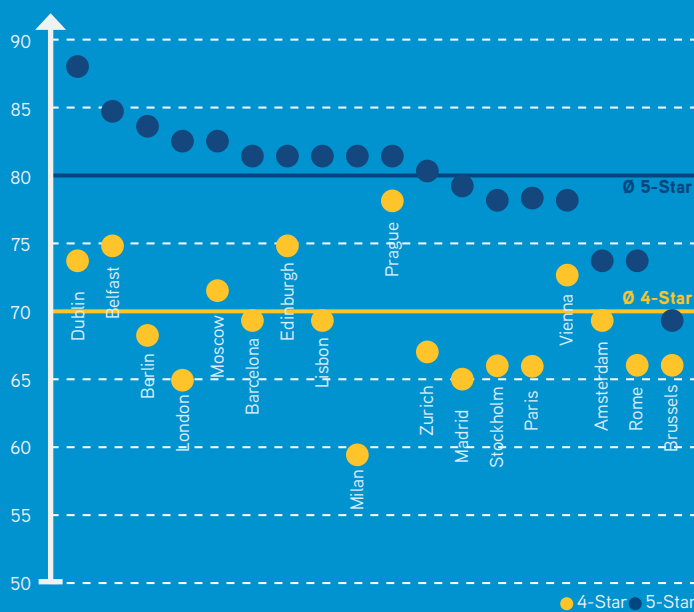


Source: Revinate, Colliers International

STAR RATING

Positive city reviews correlate to the star rating classification of hotel on offer. For hotels ranked four star and below, the number of positive online reviews – as expected – starts to drop from those given for five star properties. If 80% is the average number of positive 5 star reviews this drops down to only 70% for properties with a four star classification. That said, the difference in positive online reviews by hotel classification differs markedly by city. A number of cities look like they need to improve their four star hotel offerings in particular - including Madrid, Milan, Rome, Stockholm, Zurich and London, which is consistent with the overall positive online reviews analysis. Rome, Stockholm and Zurich also need to improve their five star hotel offerings, as do Amsterdam and Brussels, four and five star hotels in Brussels have the weakest combined online review ratings, both performing below par relative to other cities.

Fig. 4: 4 - 5-Star Reviews [%]



Source: Revinate, Colliers International

VALUE IS THE LOWEST COMMON DENOMINATOR

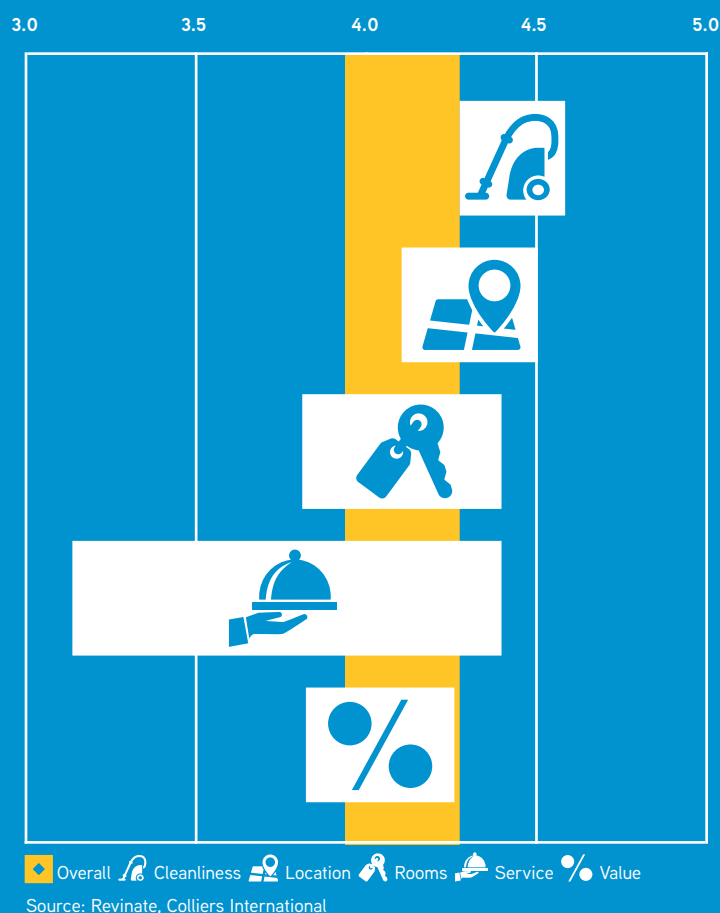
Online reviews are generally comprised of more than just an overall rating. Specific subcategory rankings reveal which components of a hotel stay/service are ranked better or worse across these city locations. There are five specific subcategories: Location, Rooms, Cleanliness, Service and Value. What is interesting across the 18 cities examined, is that Value is almost always the lowest common denominator, i.e. it is the lowest ranking subcategory, for all cities except Rome, London and Stockholm where the Rooms score is lower or equally low.

On a more positive note, the hotels on offer rank highest in Location and Cleanliness across almost all locations. Hotels in Lisbon, Moscow and Prague are considered to be the best ranking hotel locations in this regard. For Location, go to Edinburgh and Belfast or London, Moscow and Stockholm.

Sandwiched between these components is Service, which is always the middle-ranking subcategory of each hotel reviewed. If hotels continue to improve on the overall service offering, perhaps this will result in an increase in value for money.

The sharing economy continues to grow the form of privately rented accommodation/lodgings like AirBnB, particularly those aimed at the budget traveller. This, combined with increasing levels of competition impacting the hotel industry, creates an immediate need to improve the guest experience and offer added value for consumer spend. For a more detailed insight into each city, please see our city hotel market infographics.

Fig. 4: Review Result Spread by Category



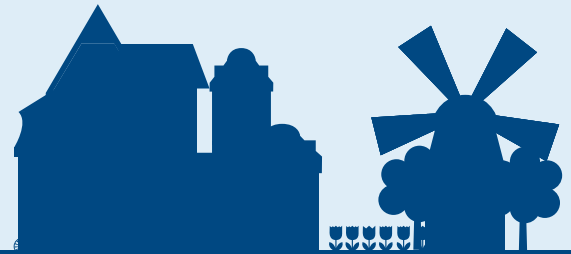
CONCLUDING COMMENTS

The hotel sector is rapidly increasing its online presence in order to access a growing global tourism market. This will lead to a more transparent sector driven by customer reviews. As the analysis in this report shows, the growth in both the frequency and volume of reviews across the European hotel sector is growing rapidly: close to 10 million hotel reviews were posted online by customers across Europe in 2015. Not only will potential customers be able to more easily search for hotel accommodation and lodging experiences that suit their needs in terms of location, budget and services provided, they will also get much more feedback on the 'look and feel' of hotels, to help drive their hotel choice.

Hotel owners and operators need to increasingly use this open review system to understand how their hotel compares to other hotels, or a city's hotel industry as a whole. This can help them focus on improving their offerings in the right areas to create a hotel experience that suits what is being demanded.

	Overall Review Rating	Reviews per Property
Prague	4.30	822
Moscow	4.23	924
Edinburgh	4.22	966
Vienna	4.21	1,109
Belfast	4.20	956
Lisbon	4.19	1,016
Barcelona	4.17	943
Berlin	4.14	1,149
Dublin	4.14	1,420
Madrid	4.12	975
Stockholm	4.11	1,126
Brussels	4.09	1,139
Rome	4.09	596
Zurich	4.05	720
Amsterdam	4.02	1,310
Paris	4.01	643
Milan	3.99	1,038
London	3.93	790

AMSTERDAM



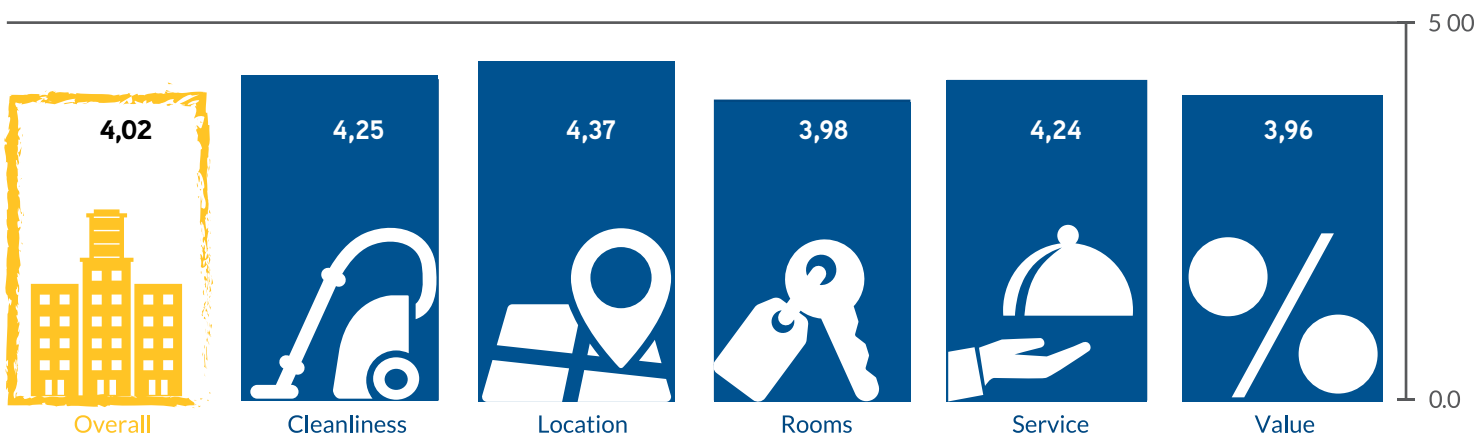
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,00	4,00	4,02
Positive Reviews	60%	59%	61%
Review Response Rates	18%	34%	31%
Reviews per Property	953	1.223	1.310

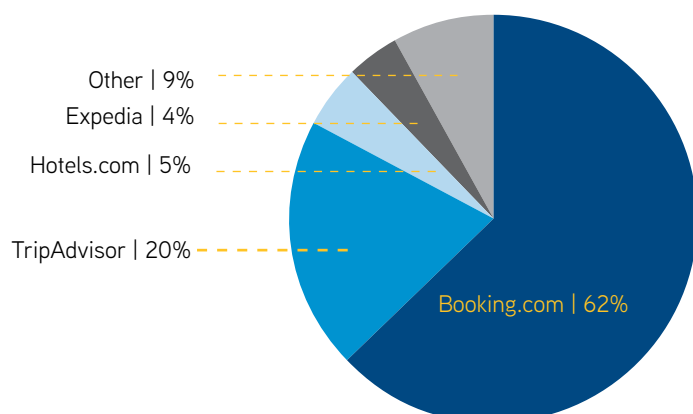
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REVIEW RATING DETAILS 2015



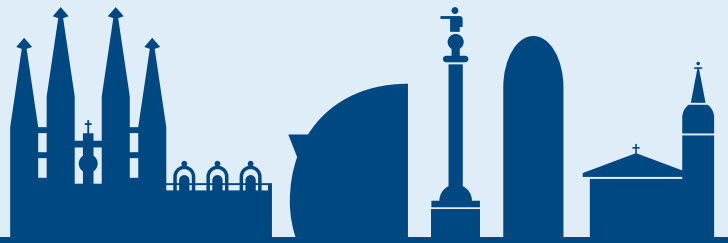
REVIEW CHANNELS 2015



KEY TAKEAWAYS

- The Amsterdam hotels market continues to be a steadily positive performer, with 61% of all hotel reviews being positive.
- This is a solid achievement, given that the pace at which online reviews are written continues to increase - just over 1,300 reviews were posted for each property in 2015. That's almost 40% more reviews than in 2013.
- With a positive overall rating (nearly 79% of the reviewed stay is rated as a four or five star stay), Locations, Service and Cleanliness are the highest-ranking subcategories with scores over four out of a possible five.
- These ratings are driven primarily by results from Booking.com and TripAdvisor, which account for 83% of all Amsterdam reviews.

BARCELONA



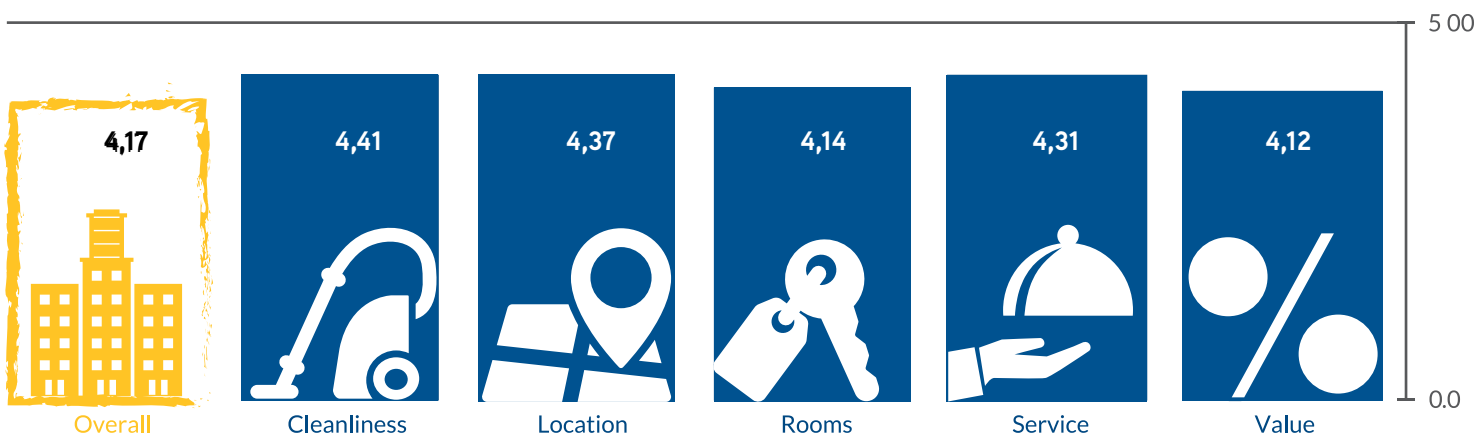
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,16	4,15	4,17
Positive Reviews	69%	67%	68%
Review Response Rates	20%	34%	29%
Reviews per Property	690	901	943

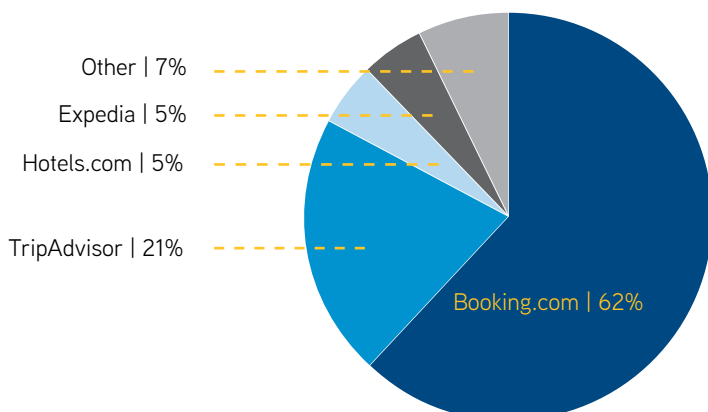
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- The continued popularity of Barcelona as a travel destination is also visible in the review pace of hotels in the city. In 2015, each hotel received 943 reviews, an increase of 37% compared to 2013.
- In spite of this increase in review pace, hotels have been able to maintain their quality as 68% of reviews is positive.
- Although the majority of the reviews is positive, hotel guests have become more critical in their reviews. In 2015, 42% of reviews was a one star rating, while in 2013 only 32% of stays received a one star review. Around 57% of reviewed stays was awarded a four or five star review.
- Booking.com and TripAdvisor remain the most important channels for reviews and their share of reviews is increasing. Where Facebook was responsible for 12% of reviews in 2013, the social network only provided 1% of all reviews in 2015. The additional share has been picked up by Booking.com and TripAdvisor.

BELFAST



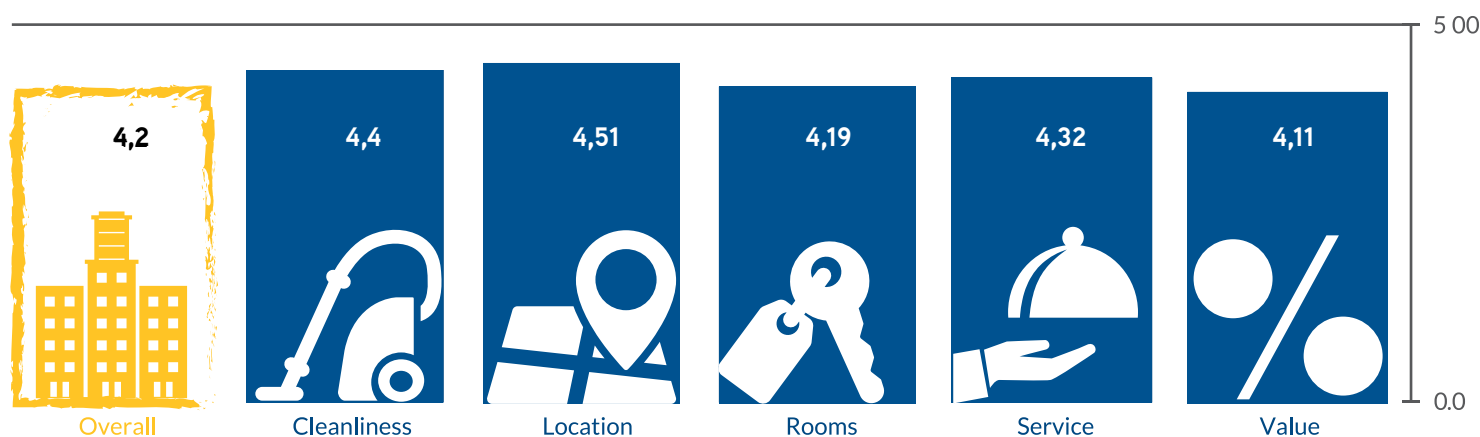
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,21	4,19	4,20
Positive Reviews	72%	69%	70%
Review Response Rates	32%	43%	33%
Reviews per Property	741	957	956

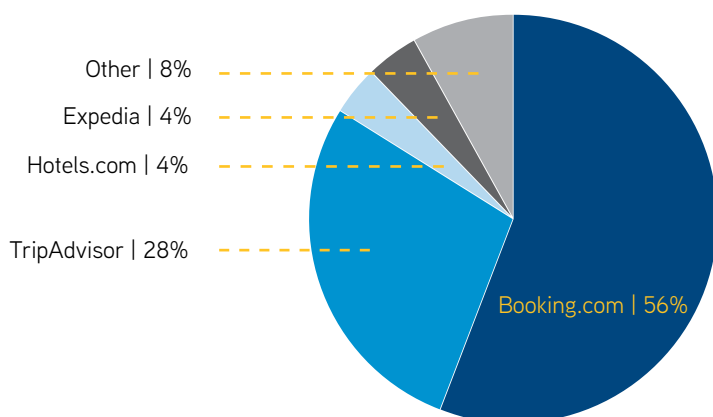
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REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Belfast has proven to have a strong hotel offering to hotel guests, as 70% of hotel reviews is positive. More than 83% of reviewed stays was awarded a four or five star review.
- Hotels perform well on Location and Cleanliness, which score 4.5 and 4.4 out of five, respectively. With an average score of 4.2, hotels in Belfast are among the strongest performers in this report.
- Guests are increasingly reviewing their stays in Belfast. While hotels received 741 reviews in 2013, 956 reviews were written for each property in 2015.
- Reviews are primarily written on TripAdvisor and Booking.com. Together these channels are responsible for 84% of all hotel reviews in Belfast. Expedia and HRS both provide 4% of all reviews in Belfast.

BERLIN



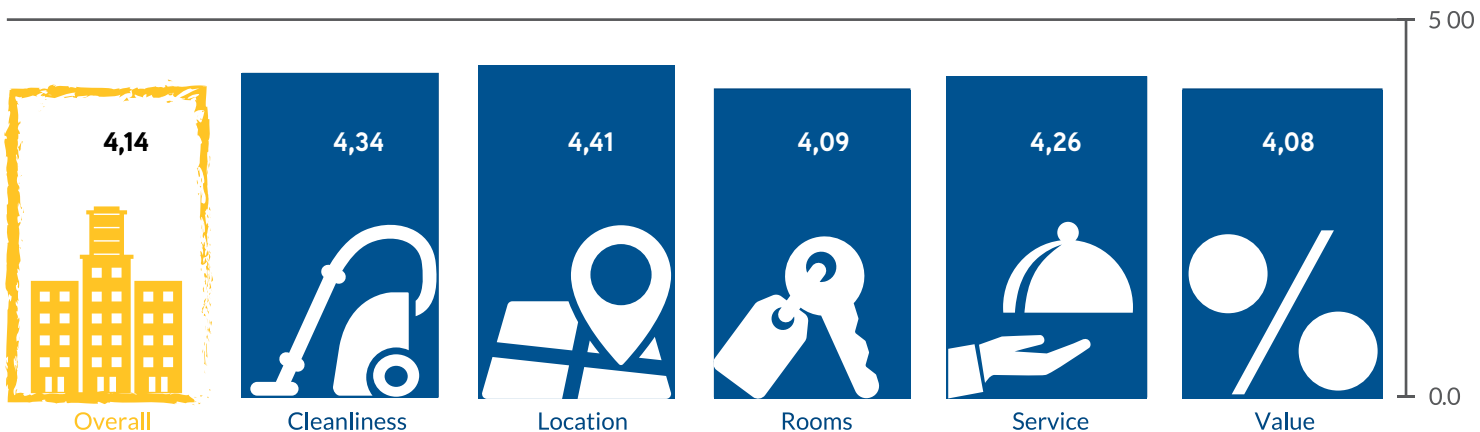
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,19	4,13	4,14
Positive Reviews	71%	65%	66%
Review Response Rates	20%	36%	38%
Reviews per Property	822	1.085	1.149

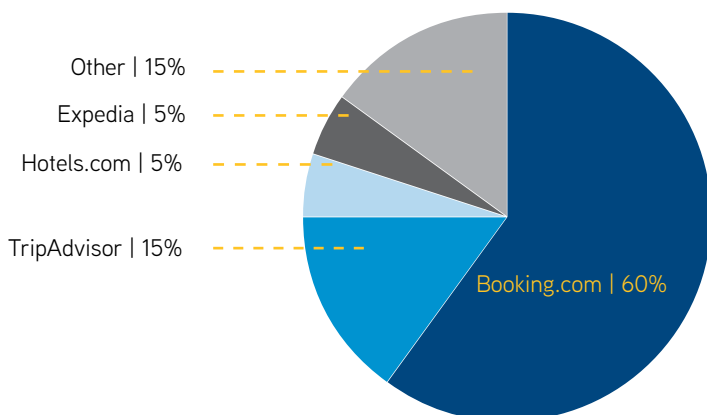
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REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Hotels in Berlin are increasingly reviewed by their guests: between 2013 and 2015 the review pace increased by 40%. This increase makes the high percentage of positive reviews even more remarkable.
- This positive performance is confirmed by the review distribution. Most reviewed stays are awarded a four star review, followed by five star reviews. Together, four and five star reviews make up almost 84% of all reviews.
- Similar as to other cities, Cleanliness and Location are the best performing subcategories. However, with the lowest subrating being 4,09, it can be concluded that hotels in Berlin perform well on all levels.
- Booking.com is the most important platform for hotel reviews and is responsible for 60% of reviews. Although TripAdvisor is also a popular platform, with 15% of reviews, it is still far behind Booking.com. Hotels.com and Expedia saw a decrease in their share of reviews.

BRUSSELS



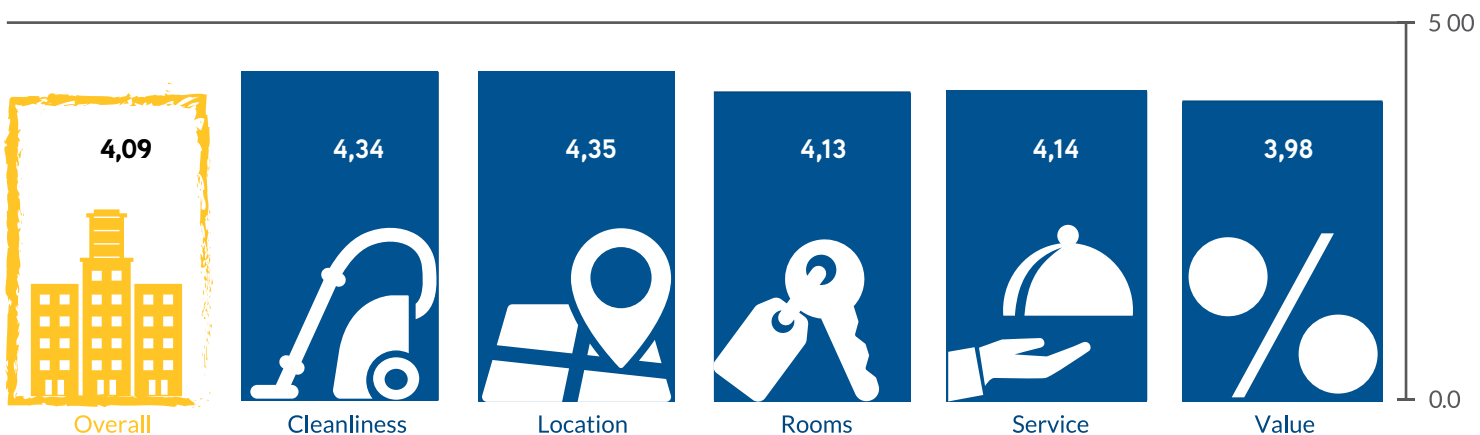
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,05	4,06	4,09
Positive Reviews	62%	61%	64%
Review Response Rates	28%	41%	35%
Reviews per Property	753	1.108	1.139

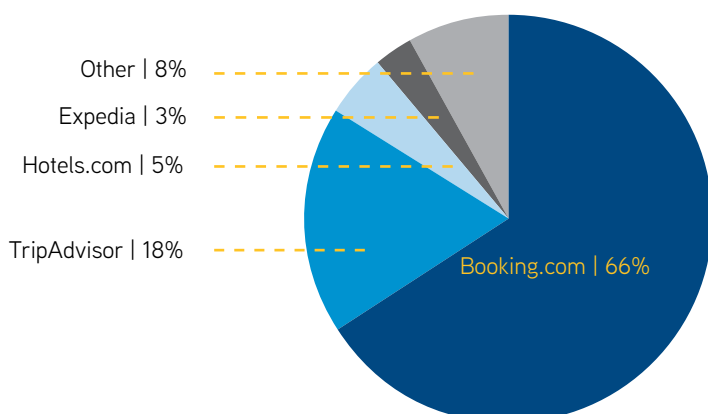
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REVIEW RATING DETAILS 2015



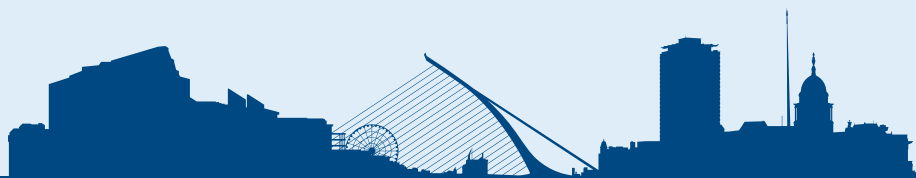
REVIEW CHANNELS 2015



KEY TAKEAWAYS

- In spite of the increased scrutiny hotels in Brussels are under - the review pace increased by 51% between 2013 and 2015 - they have been able to improve their overall rating for two consecutive years.
- The majority of hotels in Brussels receive positive reviews - 64% of reviews is positive - and 82% of all reviews is comprised of four or five star reviews.
- Guests most appreciate the locations and cleanliness of the hotels in Brussels. Ratings for all subcategories have improved in recent years.
- The main channel for reviews is Booking.com. With 66% of all share, the platform dominates the review distribution. Both Booking.com and TripAdvisor saw an increase in their share of reviews, while channels such as Expedia and Hotels.com saw a decrease in their contribution.

DUBLIN



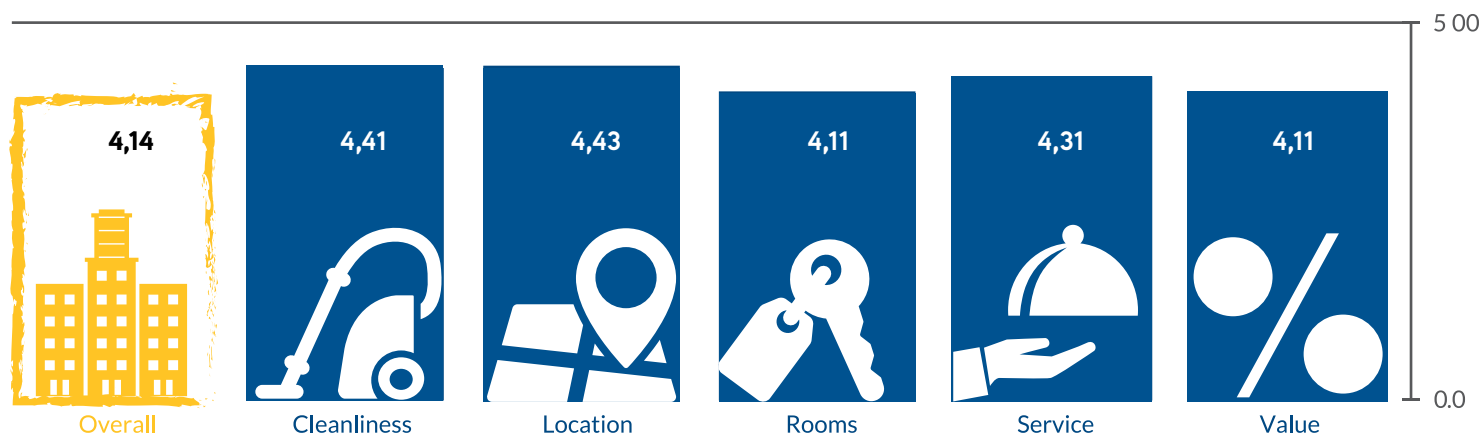
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,11	4,11	4,14
Positive Reviews	69%	65%	67%
Review Response Rates	34%	43%	35%
Reviews per Property	854	1.251	1.420

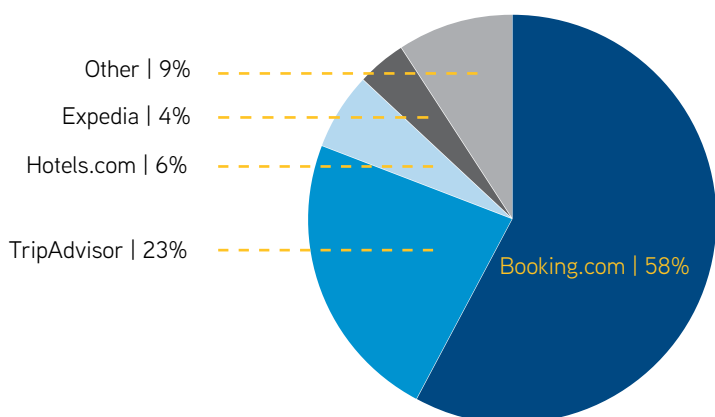
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REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Dublin proves to be a solid performer in the European hotel market with an overall rating of 4.14 and with 67% of reviews being positive.
- These results are especially noteworthy as the reviews pace increased significantly in recent years: between 2013 and 2015, the number of reviews per property increased by 66%.
- The locations, cleanliness and service levels of the hotels in Dublin are highly appreciated by guests.
- 81% of reviews appear on Booking.com or TripAdvisor. The two channels increased their share from 62% in 2013, while Facebook has become a less popular channel for hotel reviews in Dublin.

EDINBURGH



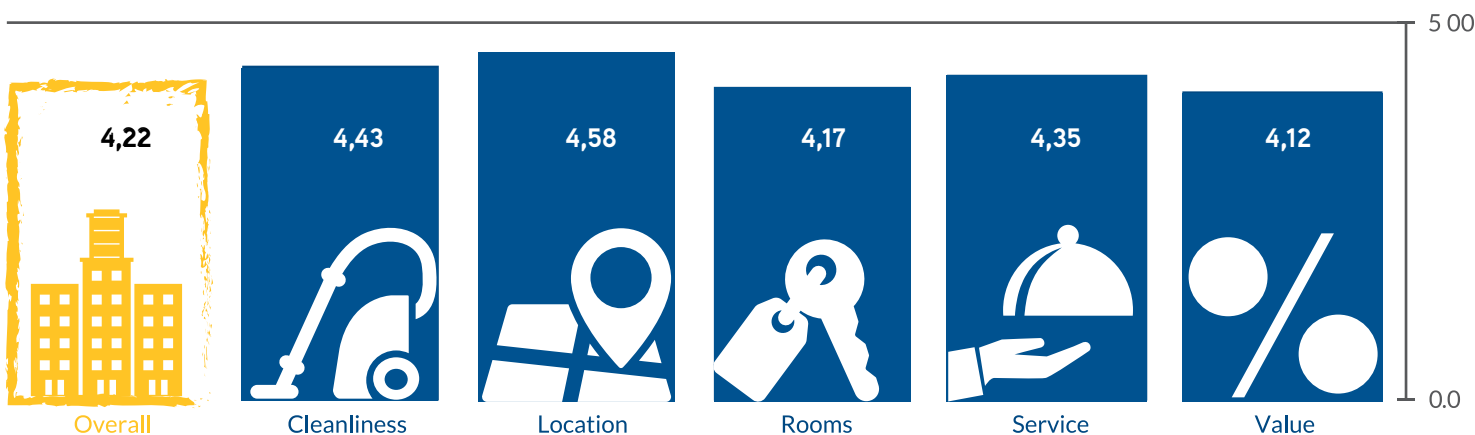
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,17	4,19	4,22
Positive Reviews	71%	70%	72%
Review Response Rates	33%	47%	34%
Reviews per Property	659	863	966

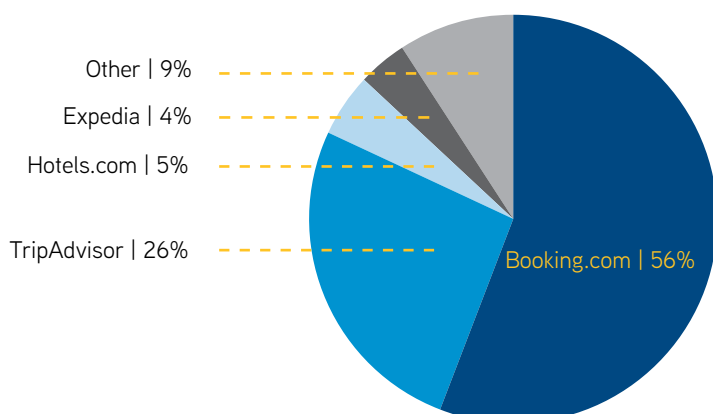
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REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- With an overall rating of 4.22 and 72% of reviews being positive, Edinburgh is one of the best performers in Europe.
- Considering the vast increase in the number of reviews per property (an increase of 46% between 2013 and 2015), this is a solid achievement.
- The positive opinion of hotels in Edinburgh is confirmed by the review distribution: almost 85% of all reviews in 2015 was a four or five star review.
- In particular, the cleanliness, locations and service levels of the hotels in Edinburgh contributed to the overall rating. However, with the lowest subrating being 4.12 for Value, hotels in Edinburgh score well on all subratings.

LISBON



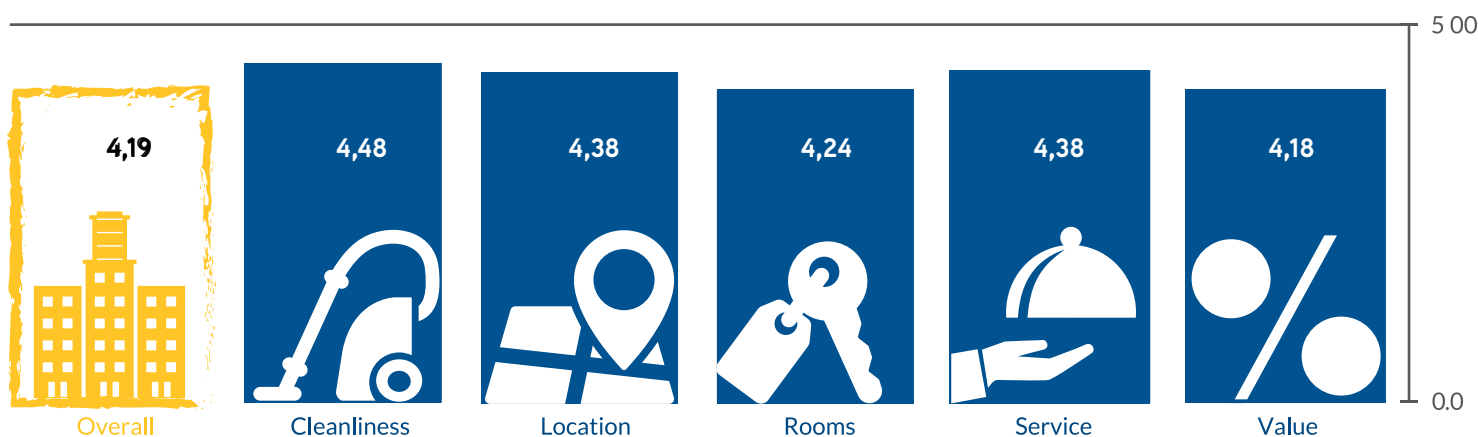
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,23	4,21	4,19
Positive Reviews	70%	67%	69%
Review Response Rates	14%	27%	25%
Reviews per Property	642	956	1.016

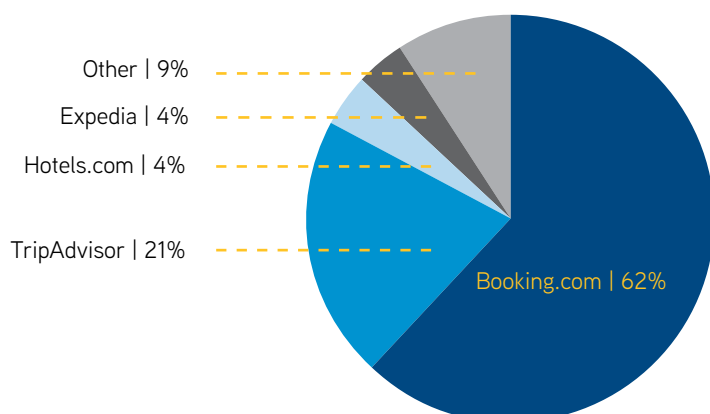
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Lisbon has proven to have a strong hotel offering to hotel guests, as 69% of hotel reviews is positive. More than 84% of reviewed stays was awarded a four or five star review.
- These results are especially noteworthy as the reviews pace increased significantly in recent years: between 2013 and 2015, the number of reviews per property increased by 58%.
- The locations, cleanliness and service levels of the hotels in Lisbon are highly appreciated by guests.
- Although Booking.com remains the most important platform for reviews, its share of online reviews decreased between 2014 (66%) and 2015 (62%). This decrease is noteworthy, as Booking.com has become more popular for reviews in other cities. Its lost share has been picked up by TripAdvisor, which increased from 16% to 21%.

LONDON



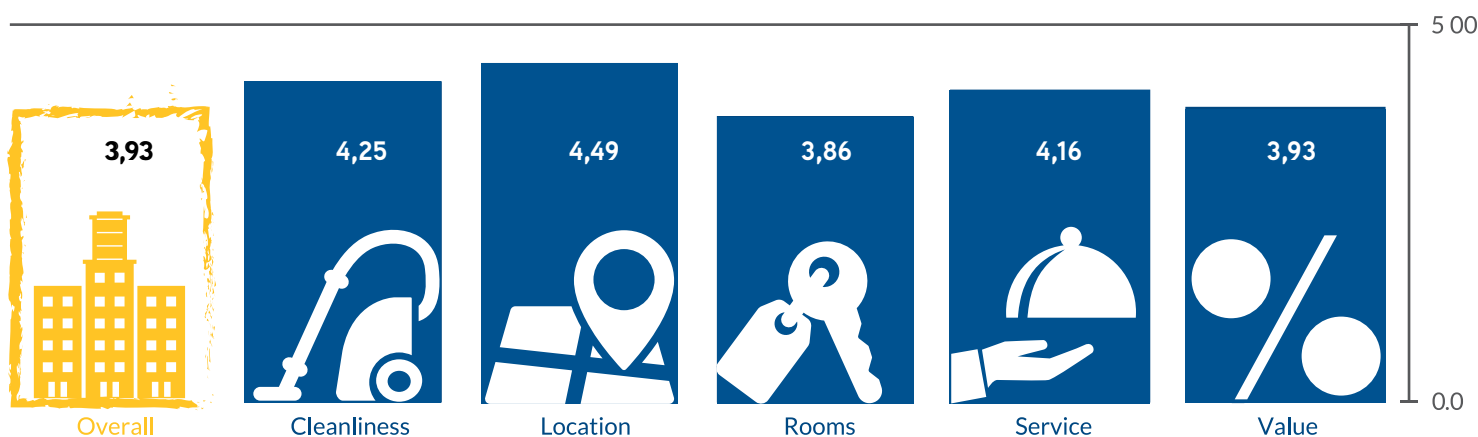
KEY METRICS

	2013	2014	2015
Overall Review Rating	3.92	3.89	3.93
Positive Reviews	58%	56%	57%
Review Response Rates	31%	39%	31%
Reviews per Property	611	778	790

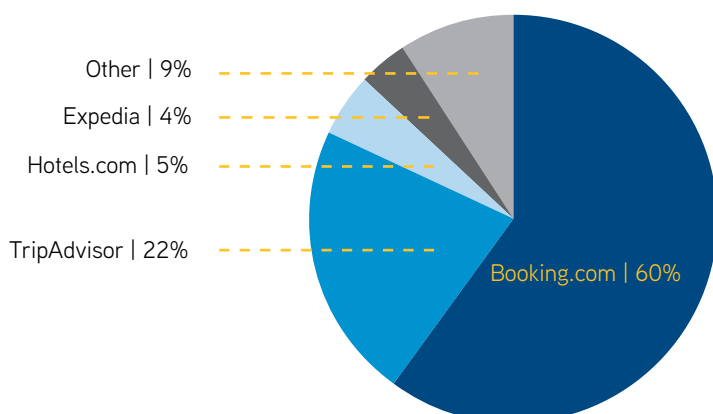
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Although London remains popular as a travel destination, hotels in London receive the lowest overall rating of all cities reviews in this report: 3.93.
- The majority of guests had a good experience during their stays - 57% of reviews is positive - and 74% of reviewed stays is awarded four or five star review.
- While guests are generally excited about the cleanliness and locations of the hotels, the quality of the rooms and value for money score lower in the subcategories
- Similar to other cities, Booking.com is the most important review platform in London. A significant difference from other cities, however, is the share of reviews on TripAdvisor: the travel site is responsible for 22% of all reviews, and its share has been stable in recent years.

MADRID



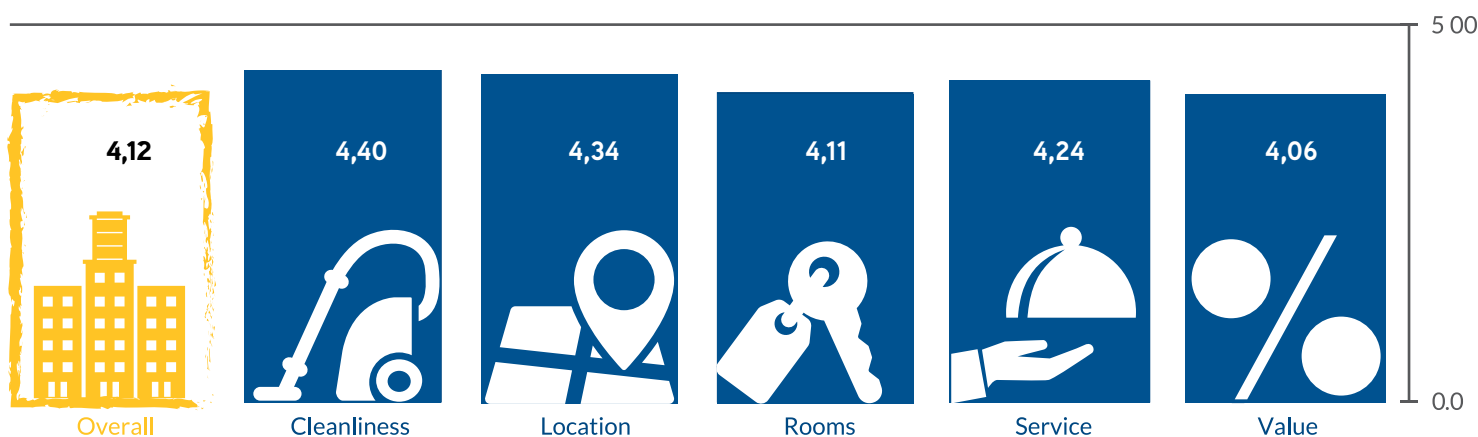
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,12	4,11	4,12
Positive Reviews	65%	62%	64%
Review Response Rates	32%	46%	35%
Reviews per Property	580	837	975

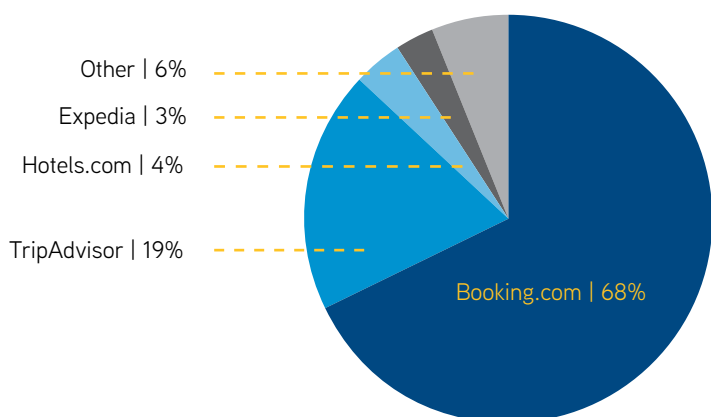
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- With a positive review rate of 64% and 84% of reviews being a four or five star review respectively, Madrid proves to be strong performer in the European hotel market.
- This is a remarkable performance considering the vast increase in review pace: the number of reviews per property increased by 68% between 2013 and 2015.
- The cleanliness and locations of the hotels in Madrid are most appreciated by guests. However, with 4.06 as the lowest subrating - for value of the stay - all subcategories in Madrid perform well.
- The main channel for reviews in Madrid is Booking.com. With 68% of all review share, the platform dominates the review distribution. Both Booking.com and TripAdvisor saw an increase in their share of reviews, while channels such as Expedia and Hotels.com saw a decrease in their contribution.

MILAN



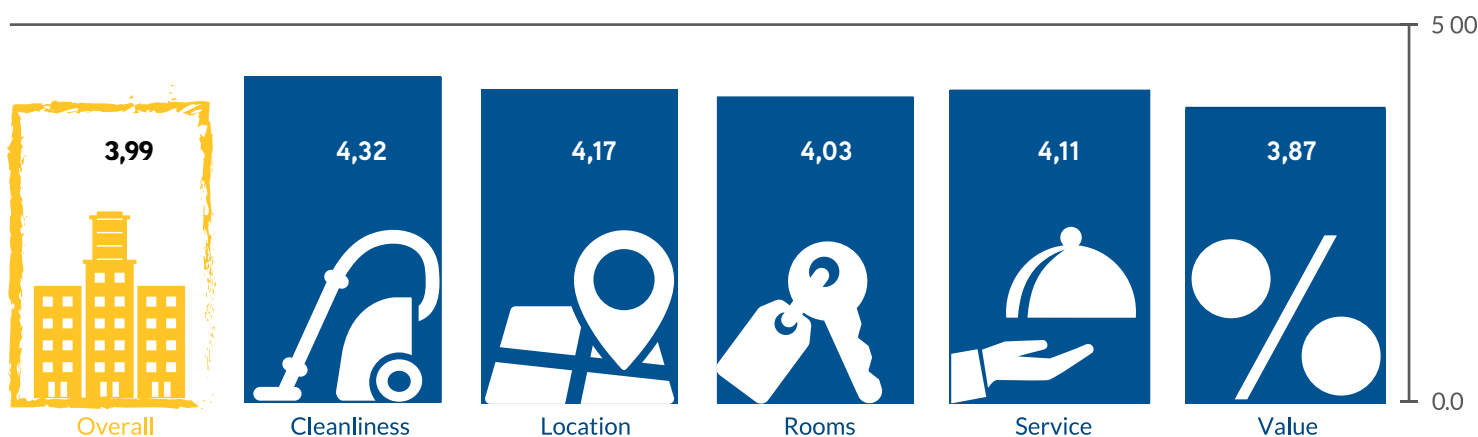
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,02	4,00	3,99
Positive Reviews	62%	58%	59%
Review Response Rates	19%	36%	28%
Reviews per Property	601	923	1.038

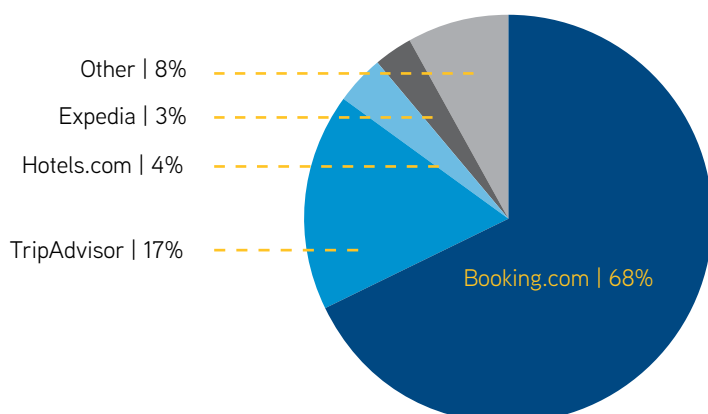
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Hotels in Milan are under increased scrutiny: the review pace in the Italian city increased by 73% between 2013 and 2015.
- The majority of reviews in Milan is positive - 57% of all reviews - and 78% of reviewed stays is awarded a four or five star review.
- Guests most appreciate the cleanliness of hotels in Milan. With a subrating of 3.87, the Value subcategory received the lowest average score.
- In Milan the main review sites are Booking.com and TripAdvisor, and their share is rising. In 2013, the two channels were responsible for 72% of all reviews and they managed to increase their share to 85% in 2015.

MOSCOW



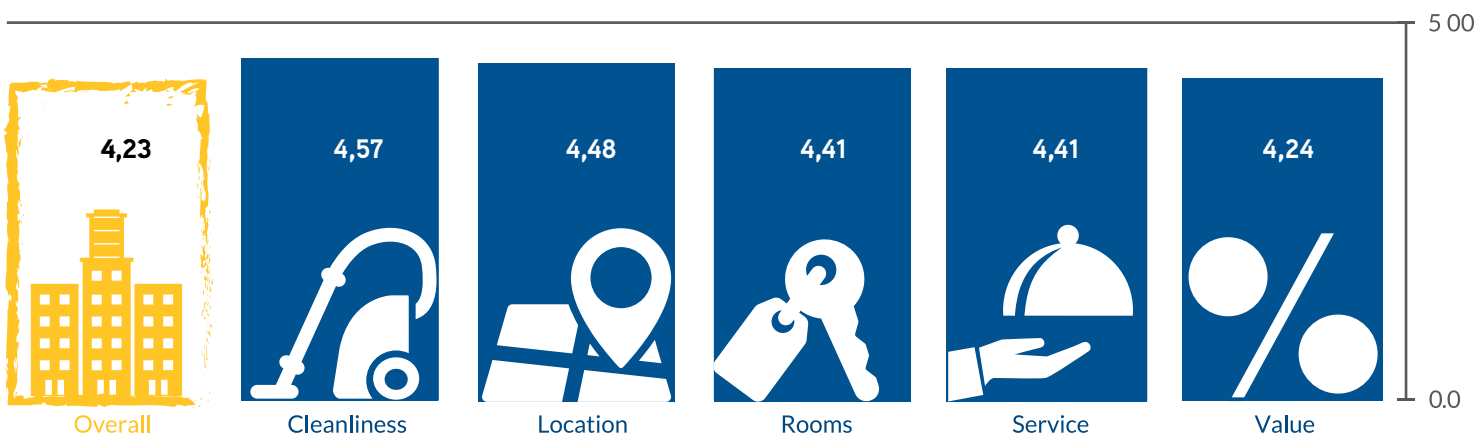
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,06	4,16	4,23
Positive Reviews	65%	66%	69%
Review Response Rates	36%	52%	48%
Reviews per Property	362	716	924

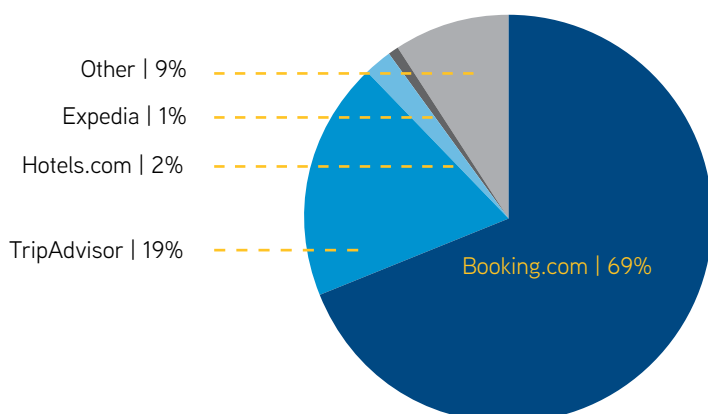
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Hotels in Moscow saw the highest increase in review pace: between 2013 and 2015, the number of reviews per property increased by 155%.
- Moscow is a steady performer as 69% of reviews is considered positive, despite this increase in review pace.
- This positive opinion of guests is also confirmed by the review distribution: 85% of reviewed stays is awarded a four or five star review.
- Booking.com is the most important review channel in Moscow and its share of reviews is increasing. Noteworthy is the decrease of TripAdvisor's share, as the travel site is increasingly popular in other cities.

PARIS



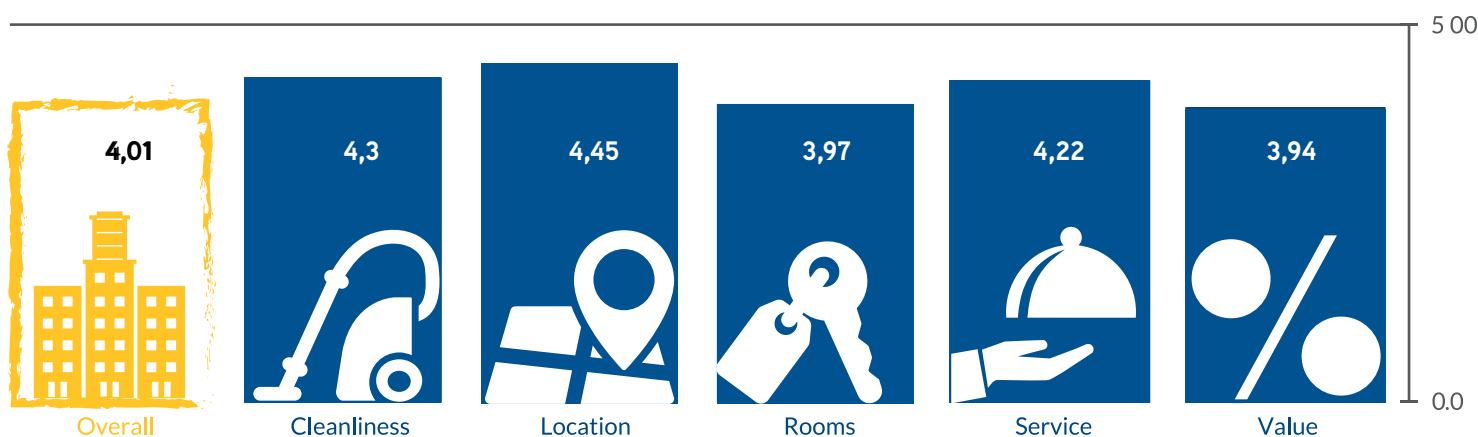
KEY METRICS

	2013	2014	2015
Overall Review Rating	3,98	3,95	4,01
Positive Reviews	62%	58%	61%
Review Response Rates	26%	39%	36%
Reviews per Property	428	610	643

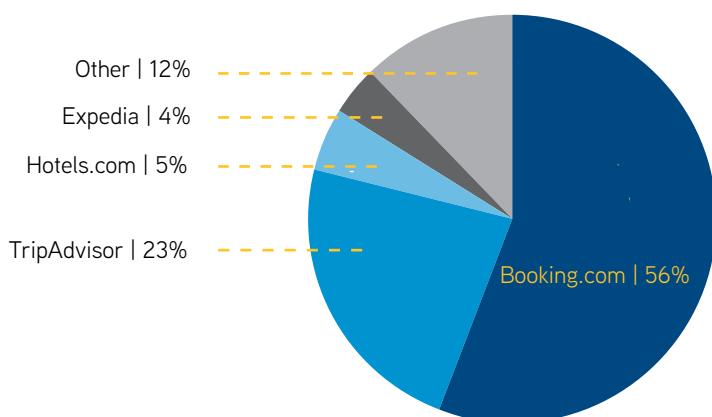
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- With 61% of reviews being positive and 78% of reviews being for a four or five star hotel, Paris has a strong hotel offering.
- Hotels in Paris are under increased scrutiny as the review pace has increased by 50% between 2013 and 2015.
- Guests most appreciate the locations and cleanliness of hotels. Guests are less excited by the room quality and value for money that is received.
- 56% of reviews for hotels in Paris appears on Booking.com. TripAdvisor is an increasingly popular platform for reviews and was responsible for 23% of reviews in 2015.

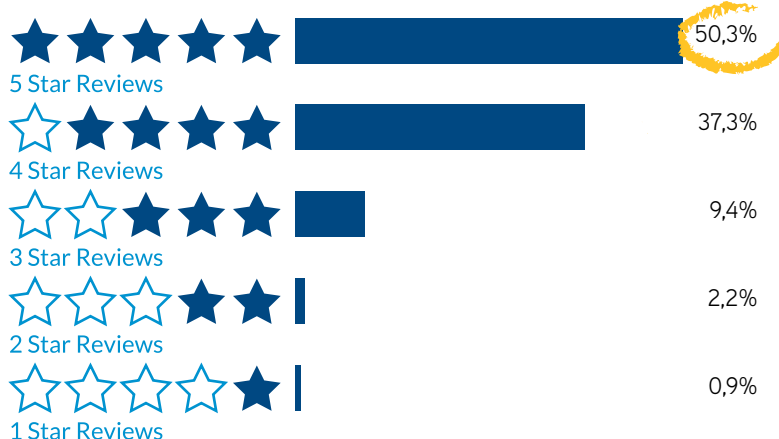
PRAGUE



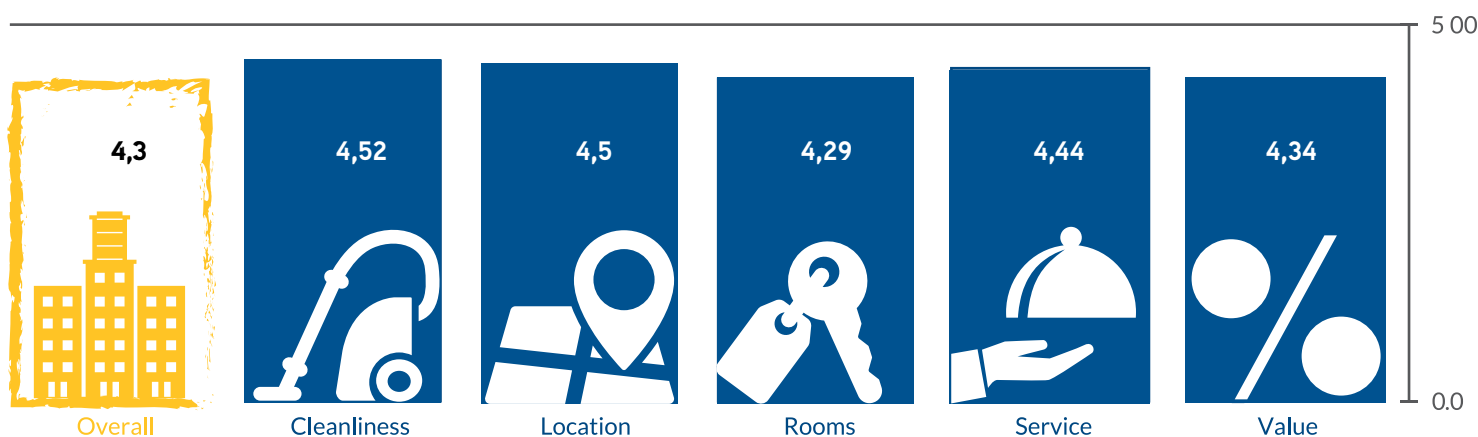
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,29	4,31	4,30
Positive Reviews	77%	75%	75%
Review Response Rates	26%	33%	32%
Reviews per Property	454	720	822

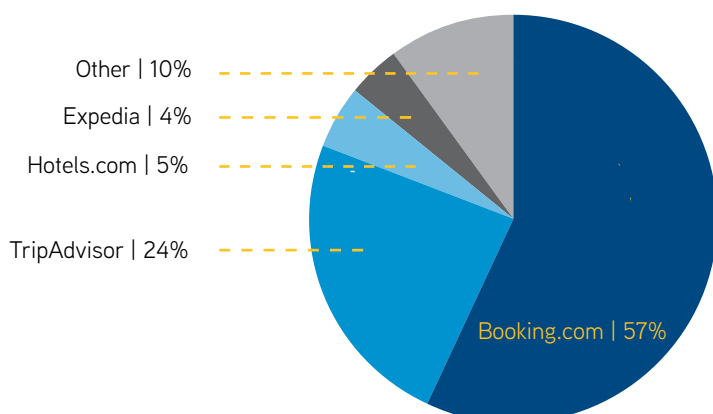
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



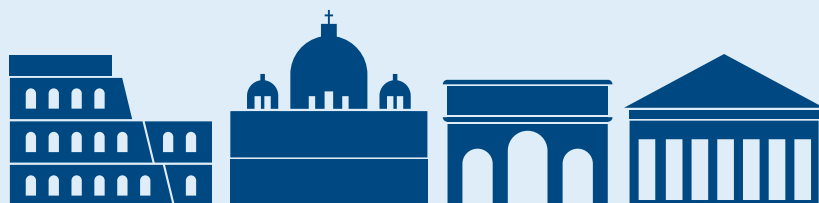
REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Prague saw a major increase in review pace in recent years: between 2013 and 2015, the number of reviews per property increased by 81%.
- Hotels continue to perform well in the capital, as 75% of reviews is positive. 88% of all reviews is comprised of four or five star reviews.
- The subratings show that hotels perform well on various aspects: with a score of 4.29, the quality of the rooms is the lowest subrating of hotels in Prague.
- Booking.com and TripAdvisor remain the most important channels for reviews and their share of reviews is increasing. While Facebook was responsible for 12% of reviews in 2013, the social network only provided 1% of all reviews for hotels in Prague in 2015. The additional share has been picked up by Booking.com and TripAdvisor.

ROME



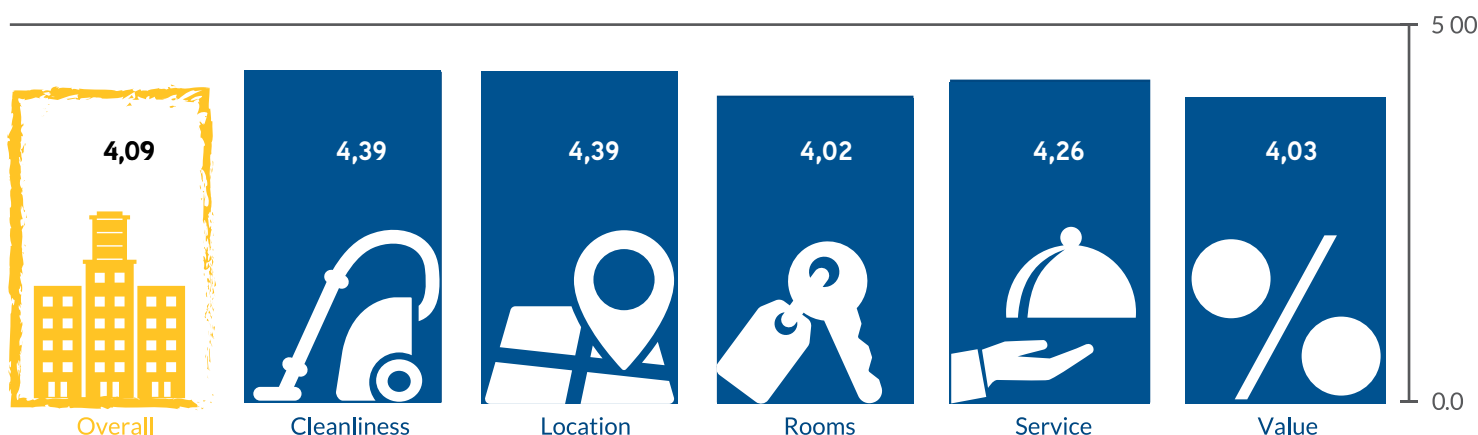
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,10	4,08	4,09
Positive Reviews	71%	65%	66%
Review Response Rates	21%	29%	27%
Reviews per Property	318	528	596

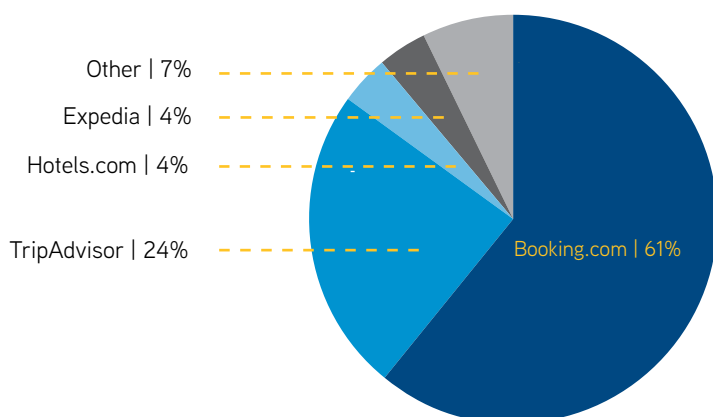
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Hotels in Rome are under increased scrutiny compared to 2013: the review pace per property has increased by almost 90% in the past two years.
- In spite of this increased pace at which hotels are reviewed, hotels remain to perform well with 66% of reviews being positive.
- This positive perception is confirmed by the review distribution in the city: 80% of the reviewed stays is considered to be a four or five star stay. The location and cleanliness of the hotels in particular contribute to this positive assessment of guests.
- Booking.com and TripAdvisor are increasingly chosen as the main review channels. In 2015, over 80% of reviews was generated by these channels, while in 2013 they were responsible for 65% of reviews.

STOCKHOLM



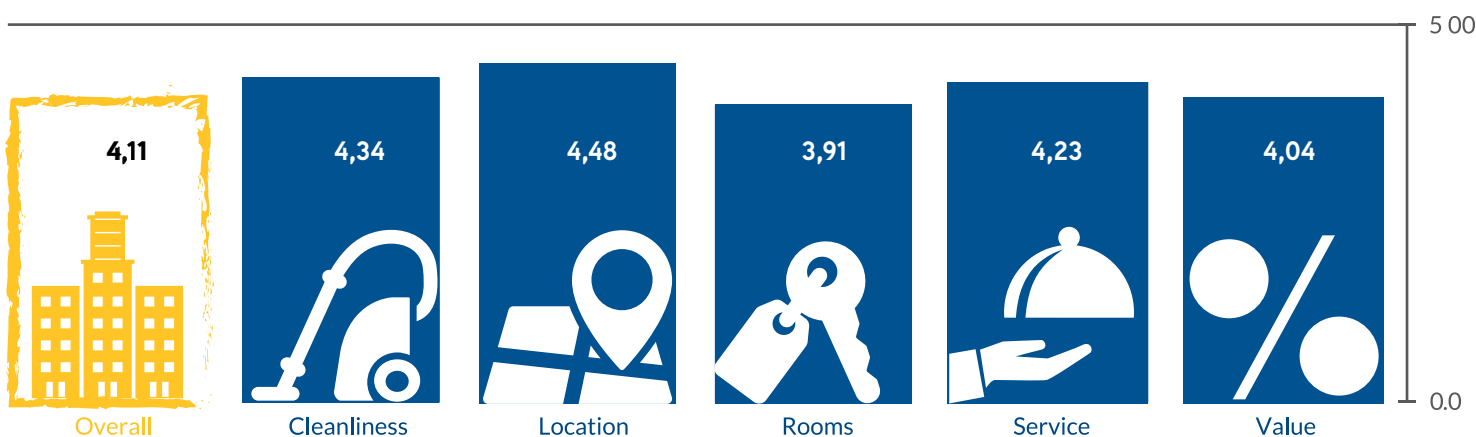
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,11	4,09	4,11
Positive Reviews	68%	64%	65%
Review Response Rates	11%	26%	28%
Reviews per Property	692	1.068	1.126

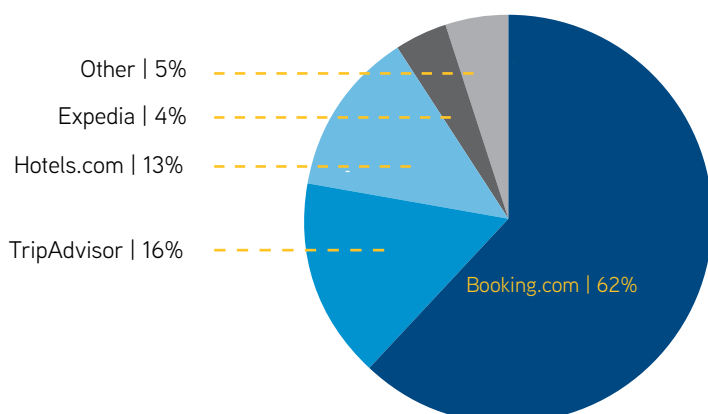
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- The hotel market of Stockholm is a steady performer with 65% of reviews being positive and an average review score of 4.11.
- Although the review pace increased significantly between 2013 and 2015 (+63%), hotels also managed to increase their response rate from 11% to 28%, indicating the increased importance of reviews to hotels.
- The cleanliness of the rooms and the locations of the hotels contribute to the positive average score of hotels in Stockholm. Guests are less satisfied by the quality of the rooms and value they receive.
- In Stockholm the main review sites are Booking.com and TripAdvisor, and their share is rising. In 2013, the two channels were responsible for 57% of all reviews and they managed to increase their share to 78% in 2015. Expedia ranked third.

VIENNA



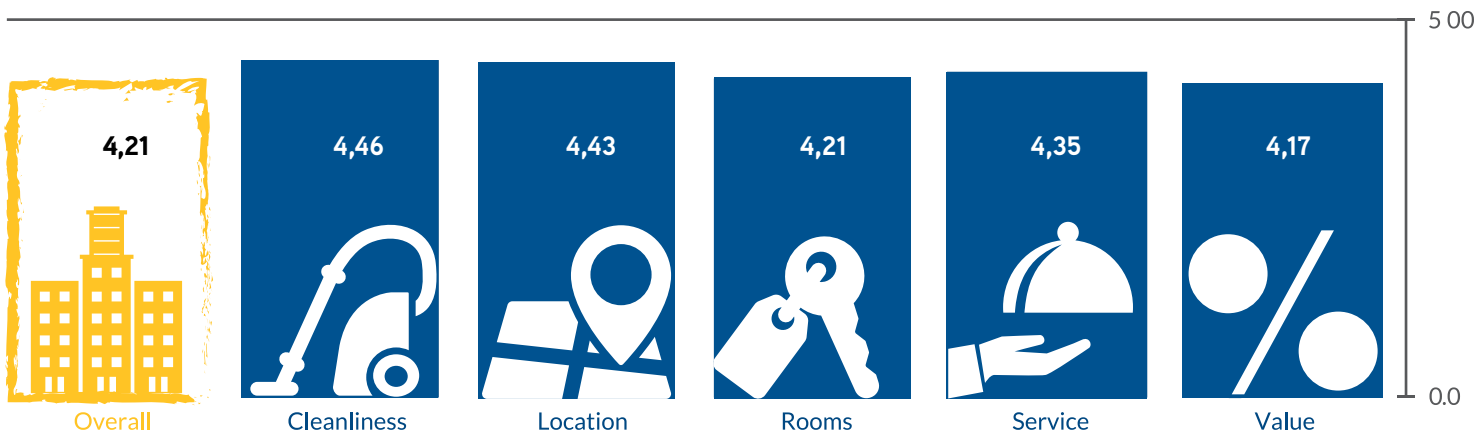
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,23	4,20	4,21
Positive Reviews	72%	68%	69%
Review Response Rates	25%	40%	34%
Reviews per Property	665	1.044	1.109

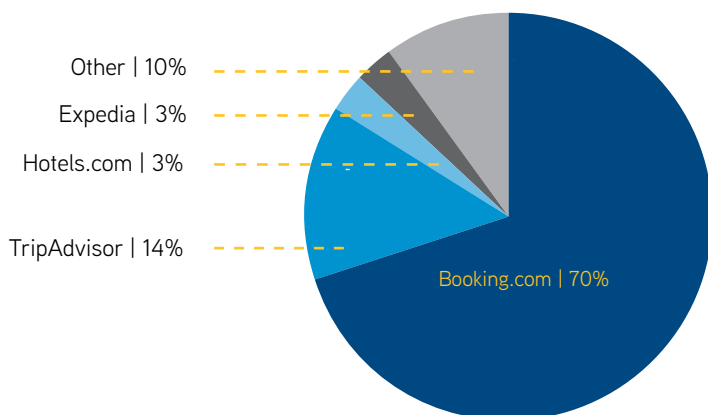
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- With a strong overall score of 4.21, the hotel offering in Vienna is rated as one of the highest in Europe. This is also confirmed by the number of positive reviews: 69% of reviews is positive.
- This positive perception of the hotel offering in Vienna is especially noteworthy because of the significant increase in review pace: the number of reviews per property increased by 67% between 2013 and 2016.
- All subcategories contributed to this high score, but Cleanliness and Location are perceived to add the most value - they were rated 4.46 and 4.43 respectively.
- Booking.com and TripAdvisor are increasingly important as the main channels for reviews. In 2015, 84% of reviews was generated through these two channels. Facebook appears to be losing its appeal, as only 1% of reviews was generated on this platform.

ZURICH



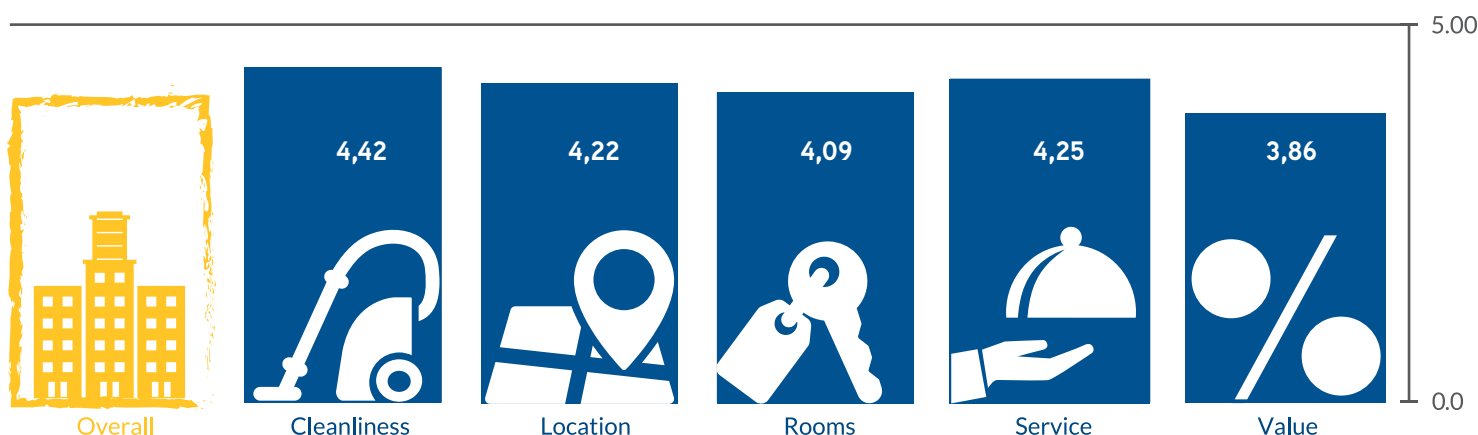
KEY METRICS

	2013	2014	2015
Overall Review Rating	4,08	4,06	4,05
Positive Reviews	66%	62%	61%
Review Response Rates	31%	54%	46%
Reviews per Property	519	682	720

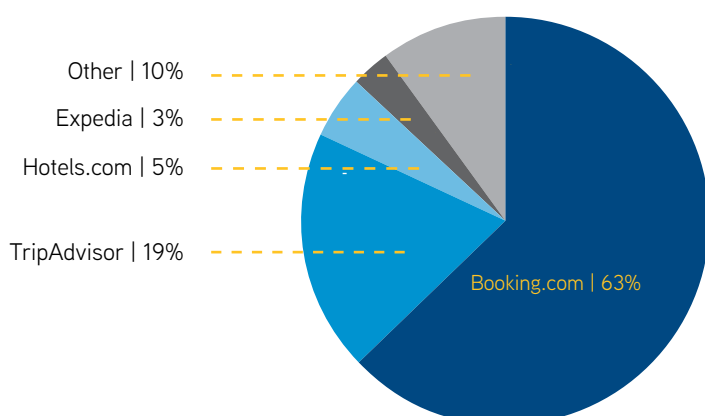
REVIEW DISTRIBUTION: BY REVIEW CATEGORY



REVIEW RATING DETAILS 2015



REVIEW CHANNELS 2015



KEY TAKEAWAYS

- Hotels in Zurich are under increased scrutiny and reviewers have become more critical in their opinions. Although review pace increased by 39% between 2013 and 2015, the number of positive reviews decreased by 5%.
- However, the vast majority of reviewed stays is awarded a four or five star review: almost 80% of reviews is rated as four or five star.
- The high scores for the cleanliness and service levels of the hotels contribute to the overall rating of hotels in Zurich. Value for money is perceived as relatively poor compare to the other indicators.
- Similar to other cities, the share of reviews for Zurich hotels on Booking.com and TripAdvisor is rising. Together, these channels account for 84% of reviews in 2015, whereas in 2013 only 65% of reviews came from these two sites. On the other hand, Facebook is no longer a popular medium for hotel reviews in Zurich.

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