

VIENNA RATING – FOCUS ON ACCOMMODATION





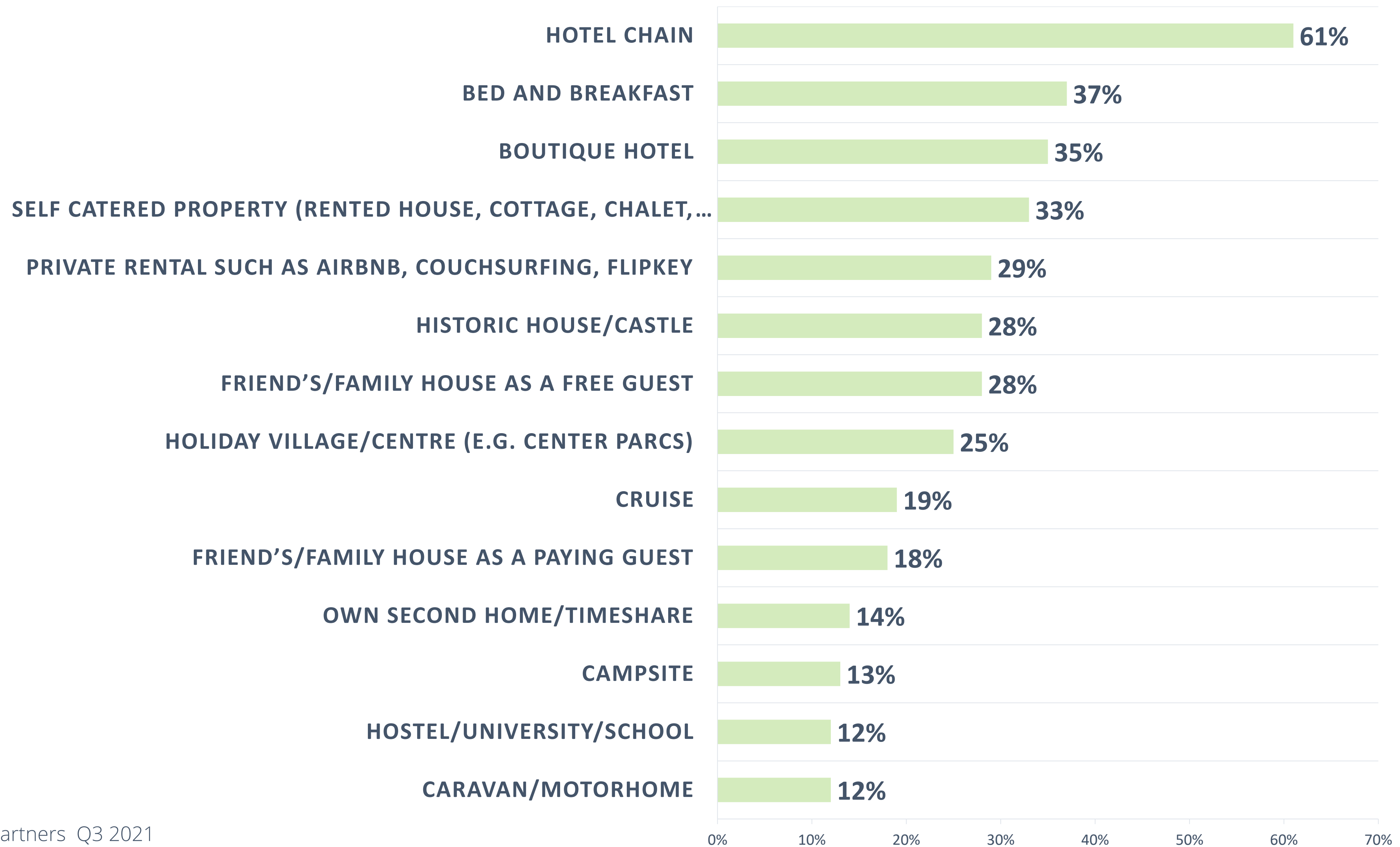
Guests' Comments
From 30+ Review Websites



Recently heard ...

- ✓ **400** Lodging in Vienna
- ✓ **Randomly selected** - All quality levels
- ✓ **720 K+** Ratings and Reviews shared during 2019-2021
- ✓ **Benchmark** vs *AVG ratings in Paris, Prague, Berlin, Barcelona, and Amsterdam for the same period*

For your next international leisure trip, would you be comfortable staying in a ... (Multiple Answers)
 Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450 – 13 markets)



What drives Sentiment in Covid Era?

FREQUENTLY HEARD IN EUROPEAN ACCOMMODATIONS

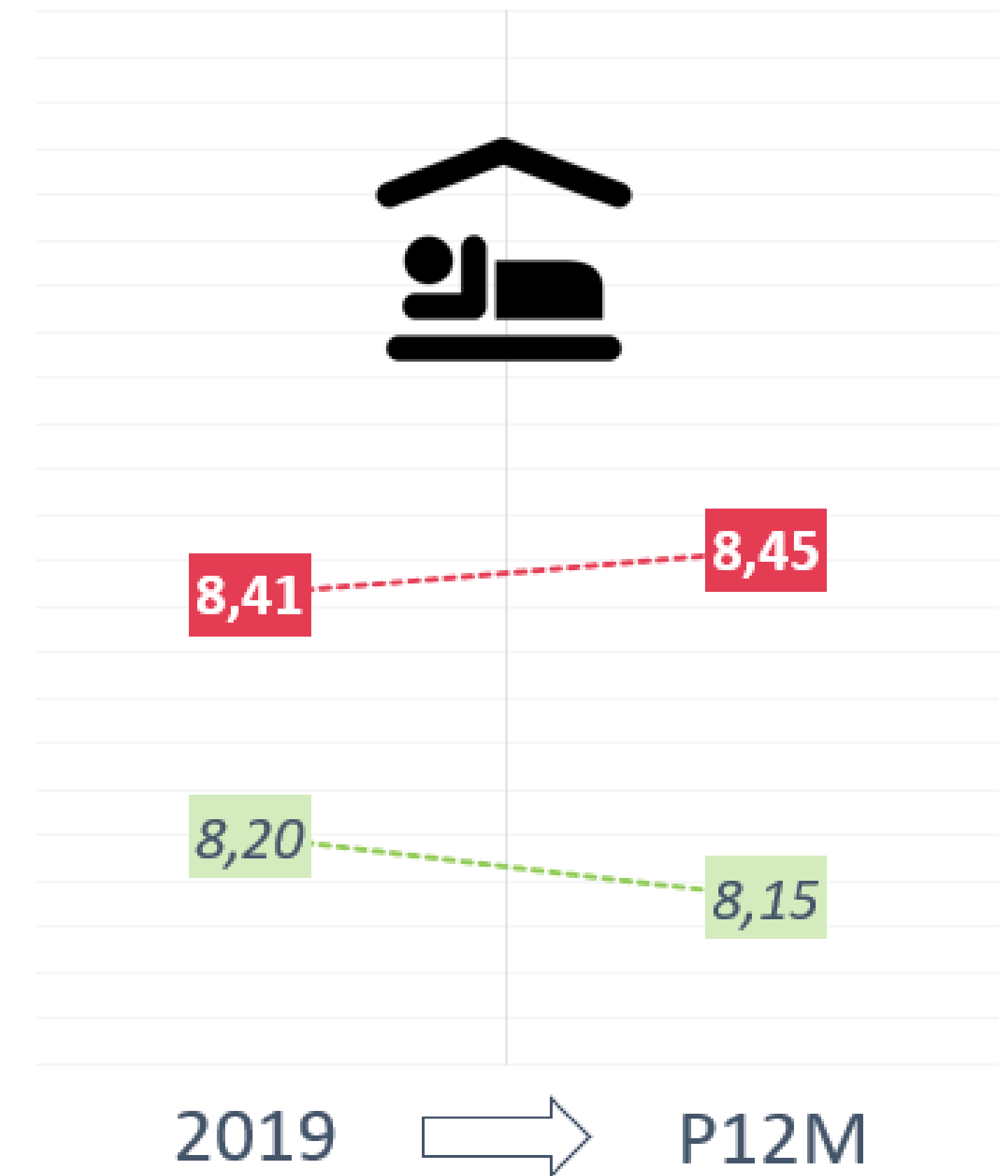
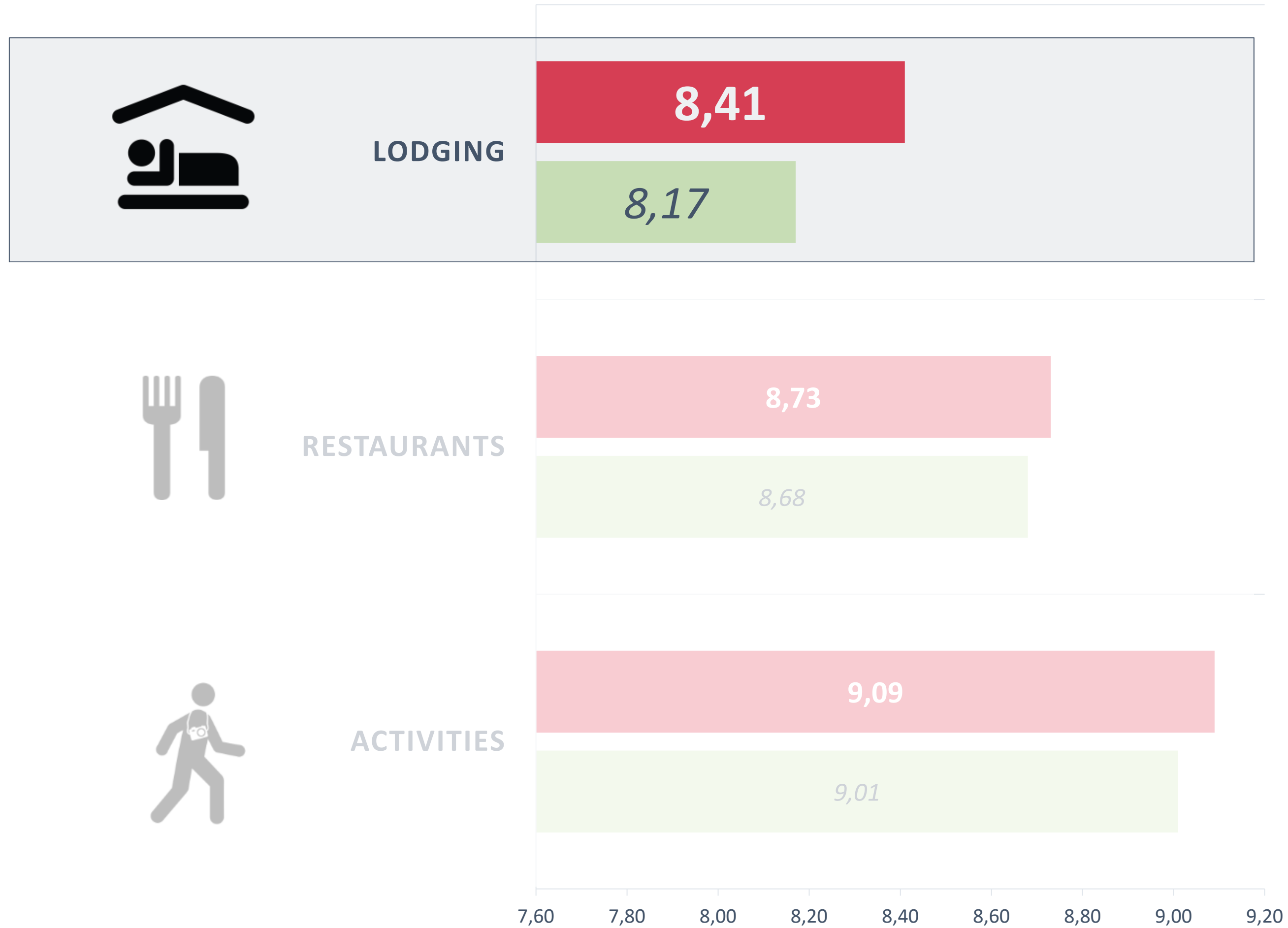


- ✓ Cleanliness (room, bathroom, entrance), good housekeeping
- ✓ Visible COVID safety measures
- ✓ Sufficient social distancing
- ✓ Satisfying hygiene requirements
- ✓ Pleasant odours
- ✓ A/C well functioning
- ✓ COVID admin requirements assistance / dealt by staff
- ✗ Lack of transparency about what amenities are available / downgraded experience
- ✗ Guests not respecting sanitary measures (e.g.: not wearing masks at breakfast)
- ✗ Insufficient housekeeping / cleaning (fingerprints, hairs)
- ✗ Staff not informing guests about COVID measures
- ✗ Crowding at check-in/out
- ✗ Breakfast too restricted because of COVID or conversely not COVID-safe enough
- ✗ Confusion about sanitary measures (e.g.: masks usage, etc.)
- ✗ Unpleasant odours
- ✗ Staff not respecting rules themselves
- ✗ Kids inappropriate behaviours

High and competitive Ratings

2019 TO DATE (10/2021)

■ Vienna ■ Benchmark

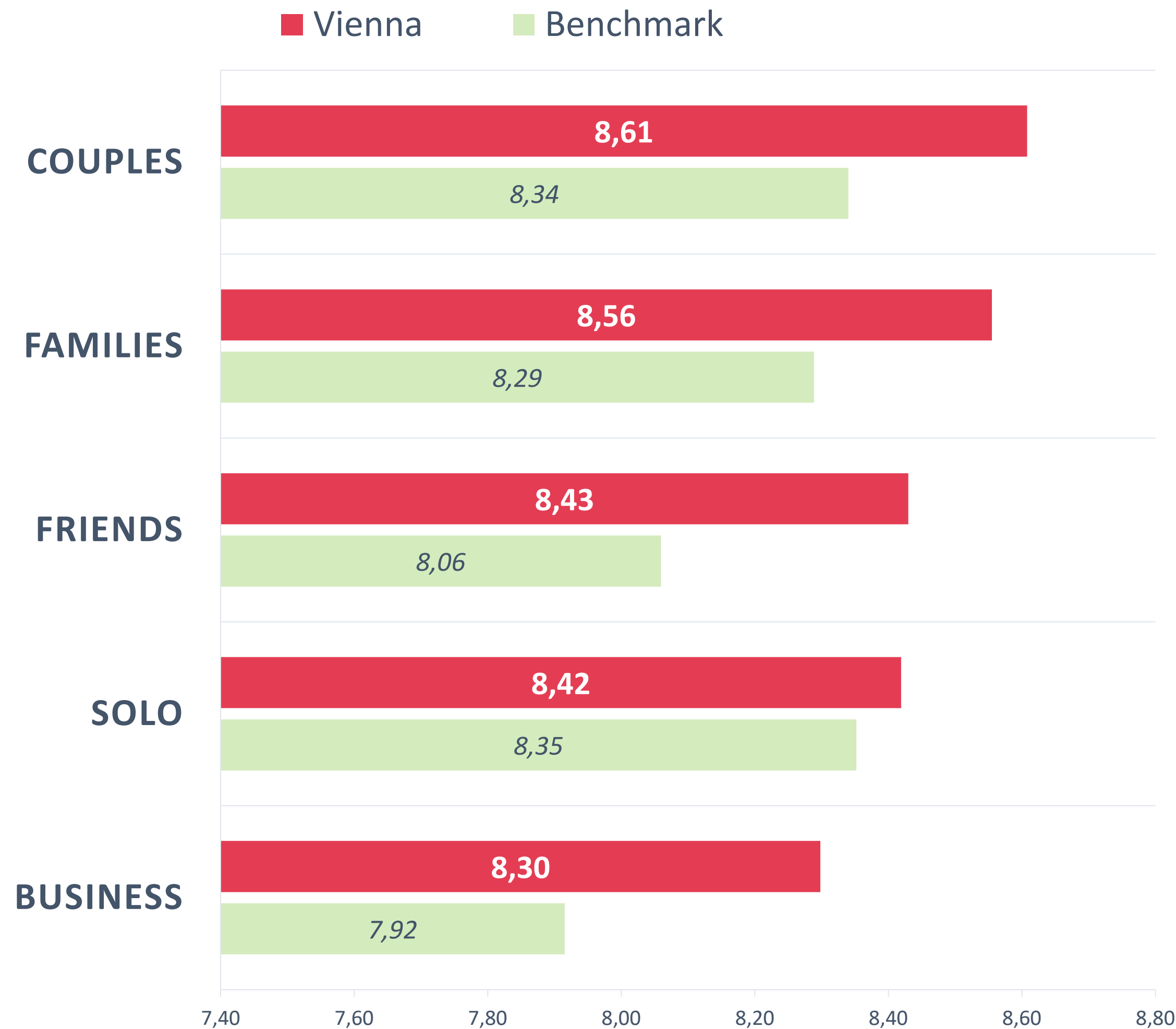


Overall Rating (/10)

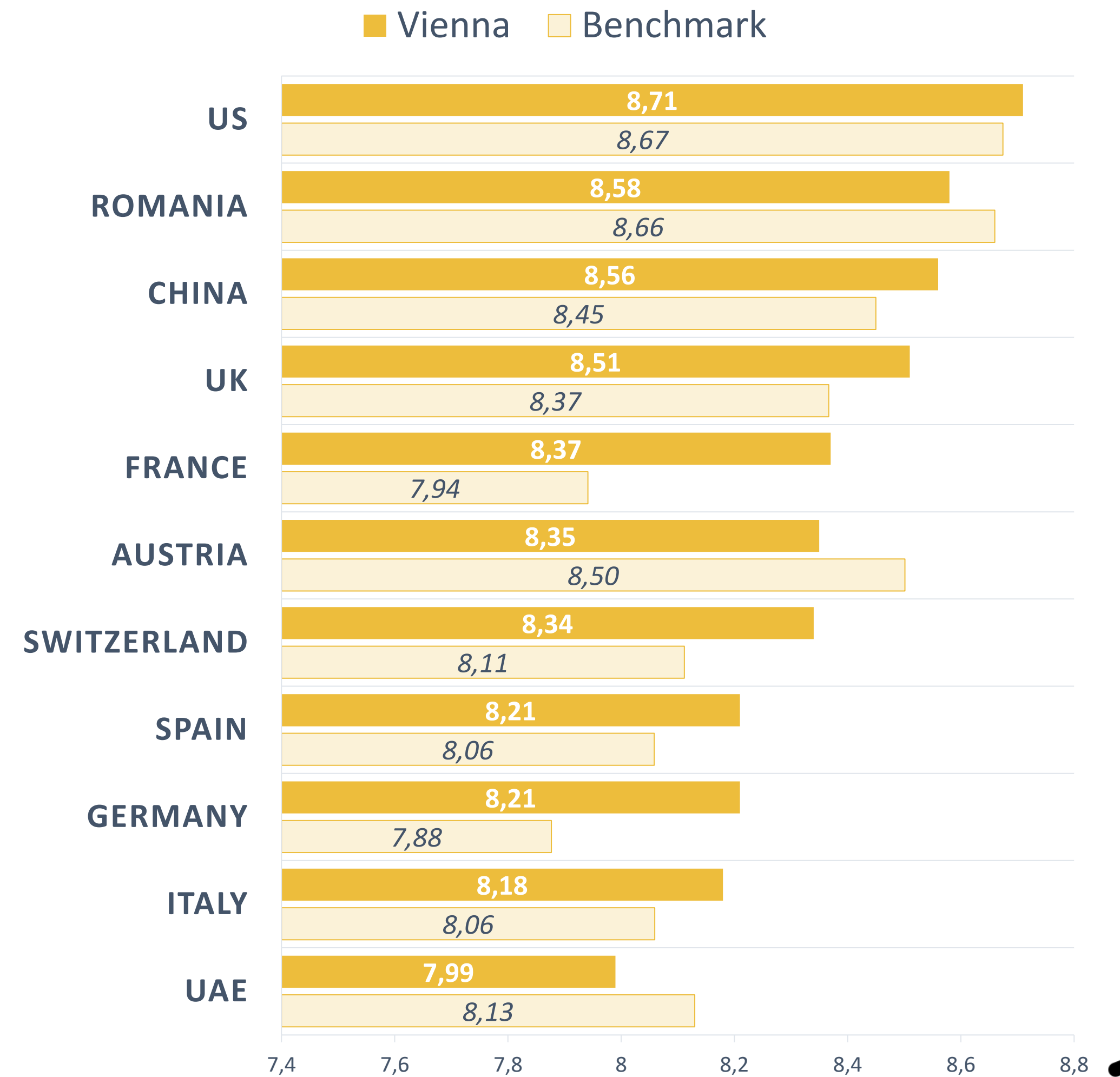
Rating per Market / Segments

2019 TO DATE (10/2021)

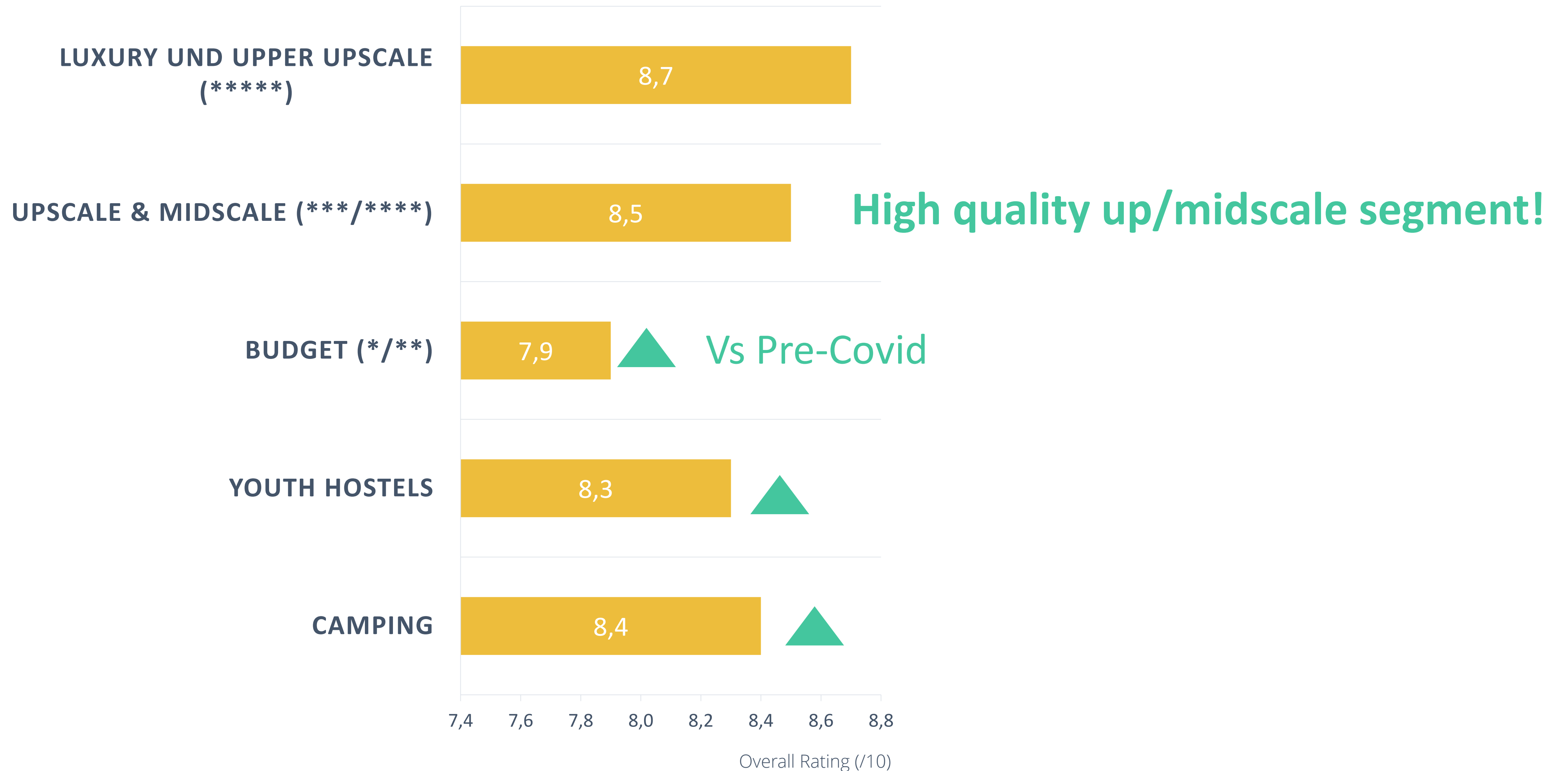
RATING PER TRAVEL COMPOSITION



RATING PER MARKET

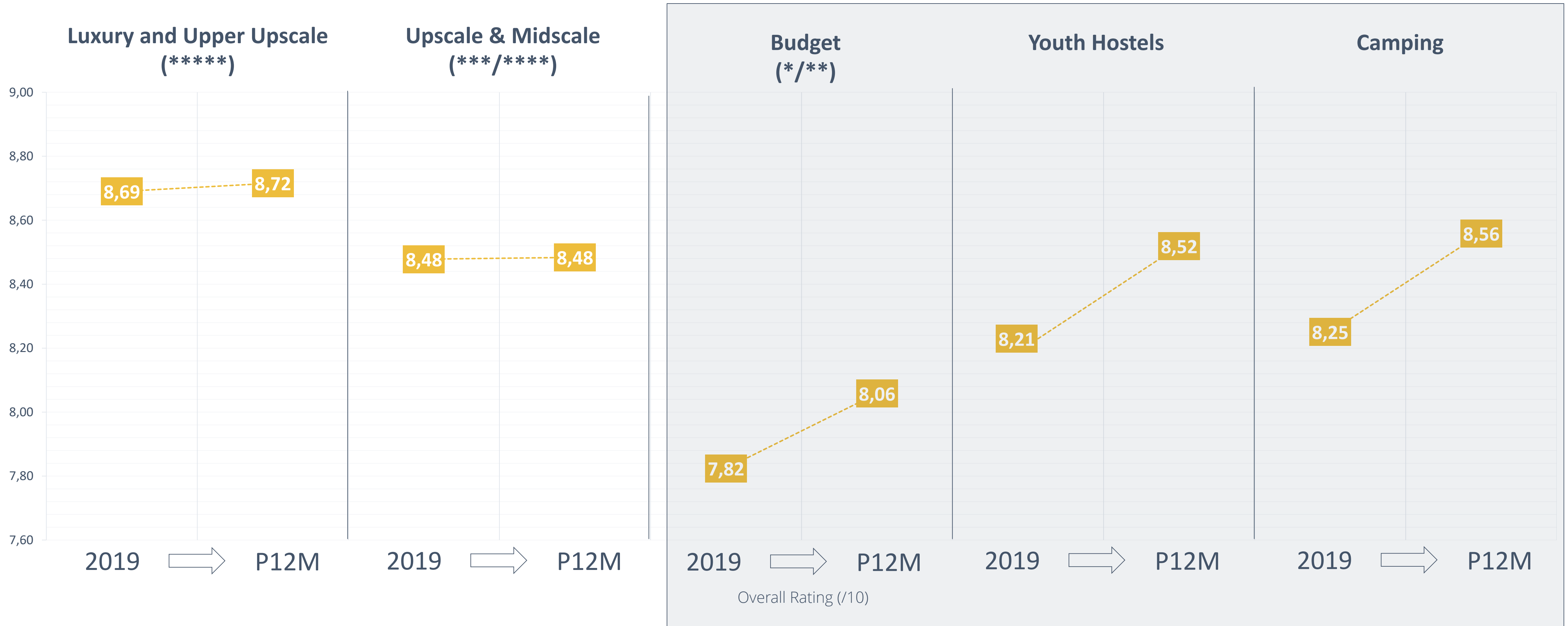


2019 TO DATE (10/2021)



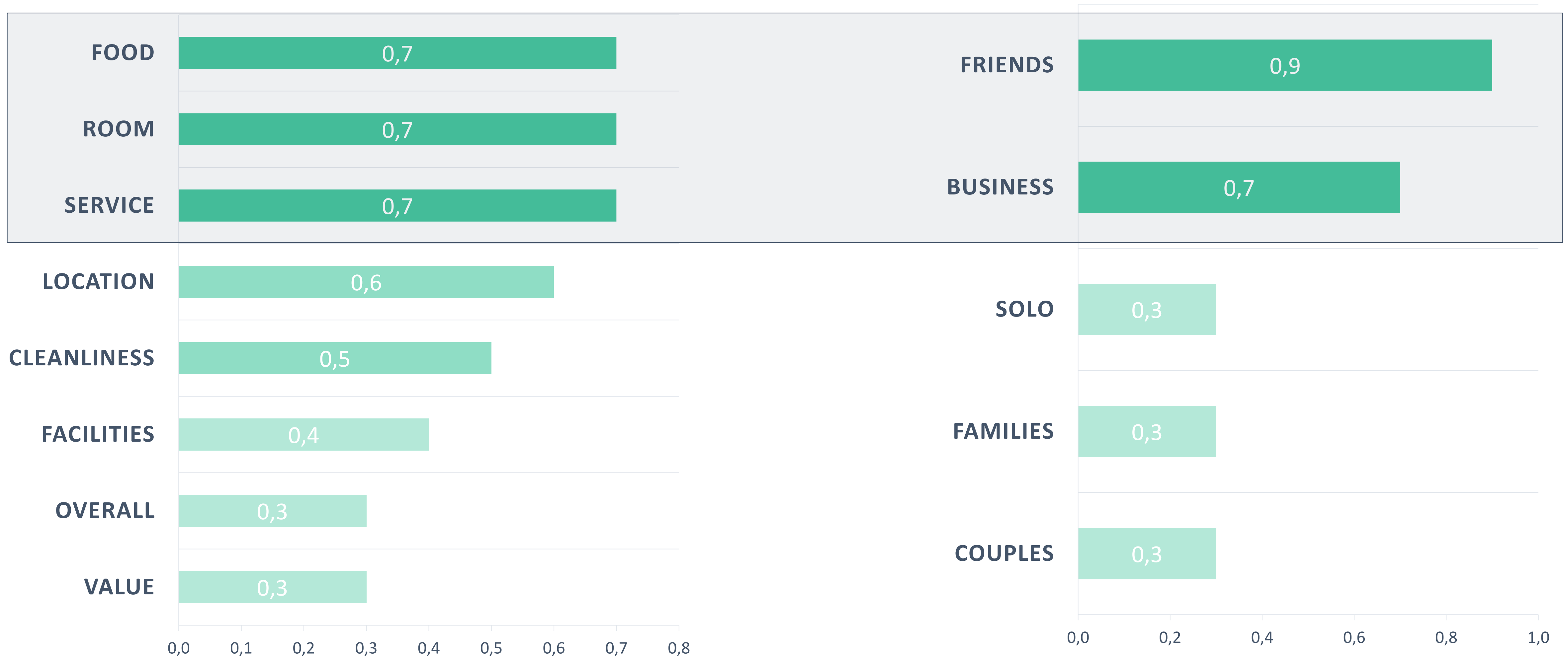
Ratings of affordable lodging on the rise!

2019 vs Past 12 Months (11/2020 to 10/2021)



What drives positive gaps in online reputation?

Gap (+) vs */**/Youth hostels



Focus on the Up/Midscale Lodging

Quality consistency over (peak) season + Atmosphere

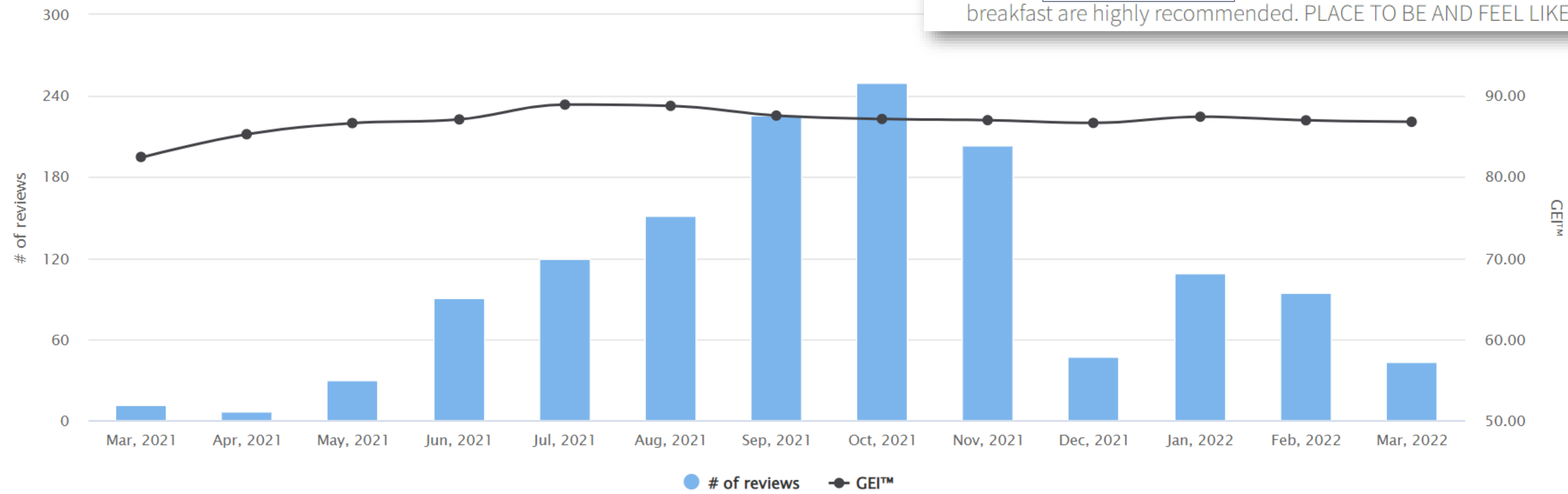
By Nima Abbaspour on February 26, 2022 10

General
They have nice coffee and atmosphere to sit and talk.

By Harald Otti on December 30, 2021 10

General
When we are in Vienna, the Motel Ones, whether Westbahnhof, Prater or Staatsoper, are a must. Not only the great atmosphere, the price-performance ratio, as well as the rich and yet inexpensive breakfast are highly recommended. PLACE TO BE AND FEEL LIKE HOME

GEI™ & Number of Reviews



2019 TO DATE (10/2021)

Topics	Opinion count	Sentiment (/10)	Sentiment Benchmark
Entertainment Facilities	194	9,76	9,73
Personnel	109047	9,56	9,47
Housekeeping	67869	9,43	9,18
Restaurant	49971	9,38	9,31
Decor	3725	9,23	9,36
Surrounding Area	72671	9,21	9,1
Food	27044	9,17	9,18
Hygiene	72145	9,13	8,69
Drink	21515	9,04	8,91
Breakfast	94703	8,91	8,26
Bar	10706	8,9	8,8
Spa	1911	8,68	8,5
Sports Facilities	2215	8,56	8,87
Transport	33595	8,45	8,36
Airconditioning	10639	8,44	8,42
Reception	11434	8,42	8,59
Room	202607	8,34	7,85
Gym	790	8,15	7,99
Light	4812	8,1	7,46
Value for money	53594	7,98	8,04
Bathroom	54284	7,92	7,98
Internet	5972	7,32	7,64
Noise environment	35377	7,27	5,62
Checkin	2809	6,55	6,7
Pandemic Precautions	3820	5,4	6,49
COVID mentions	1730	4,94	5,33
Sanitary Safety	12834	4,88	5,24
Checkout	872	4,56	5,98
Odor	4034	2,9	2,54
Humidity	1427	0,35	0,35

- Great reviews for **material factors** (room quality, accessibility, hygiene...) and more **intangible factors** (personnel, surrounding, silence, decoration, lights...).
- **Breakfast is competitive USP** in Covid era as travellers in Europe complain on poor quality breakfast “because of Covid” and look for **self-indulging**.
- **Sentiment about sanitary safety below the competitive norms** but less from hygiene issues than **co-living issues with other guests** not respecting rules in place.
- The **check-in and check-out** (generating potential “frictions” between guests) raise a bit more negative comments than average competition.
- The overall **value for money** sentiment for lodging is high and **in line with competition**.

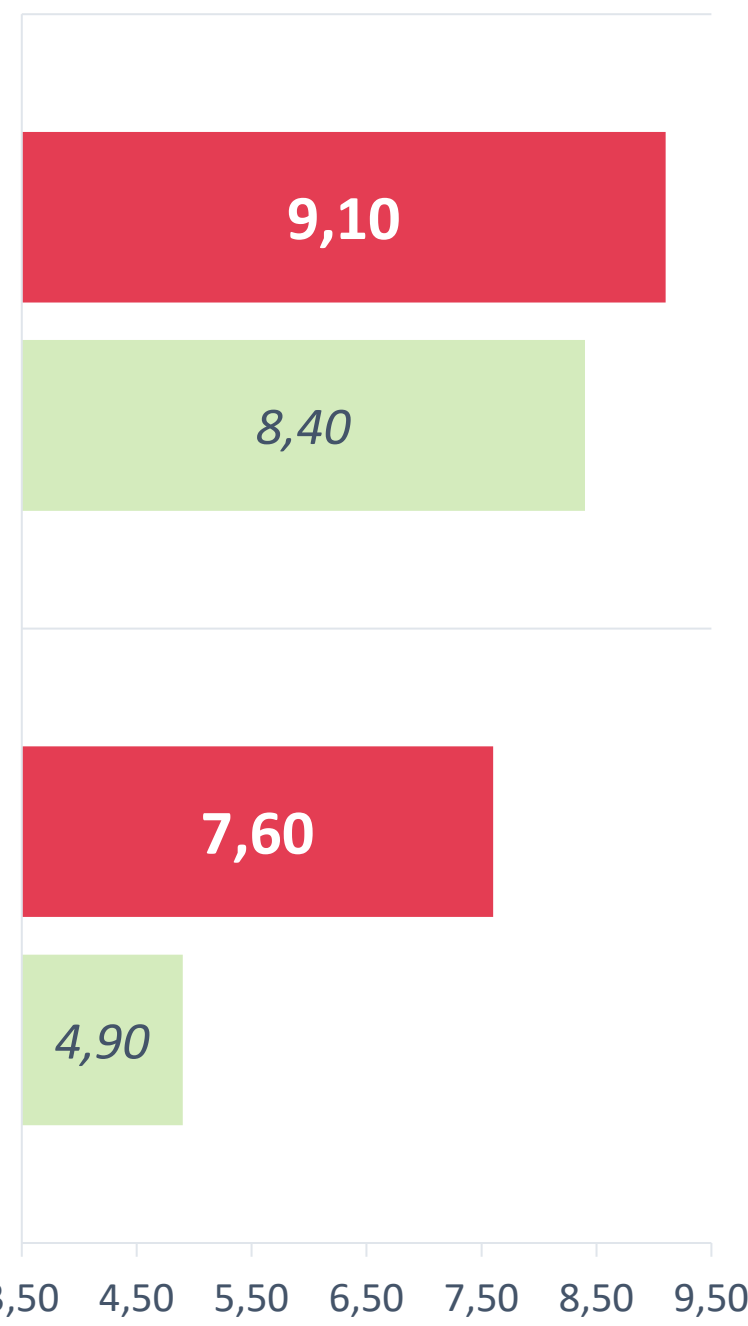
Good Practice

Adina Hotel Vienna Belvedere

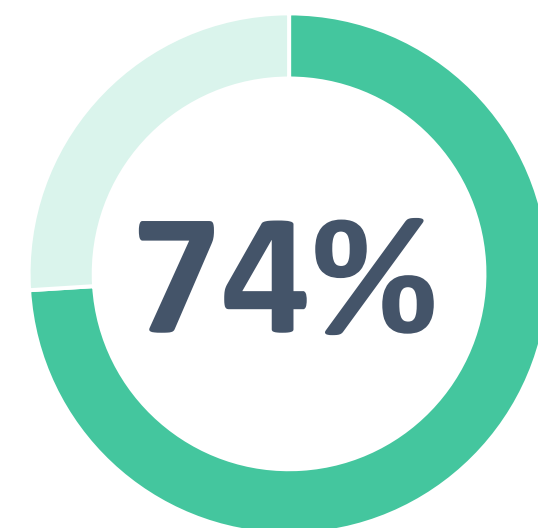
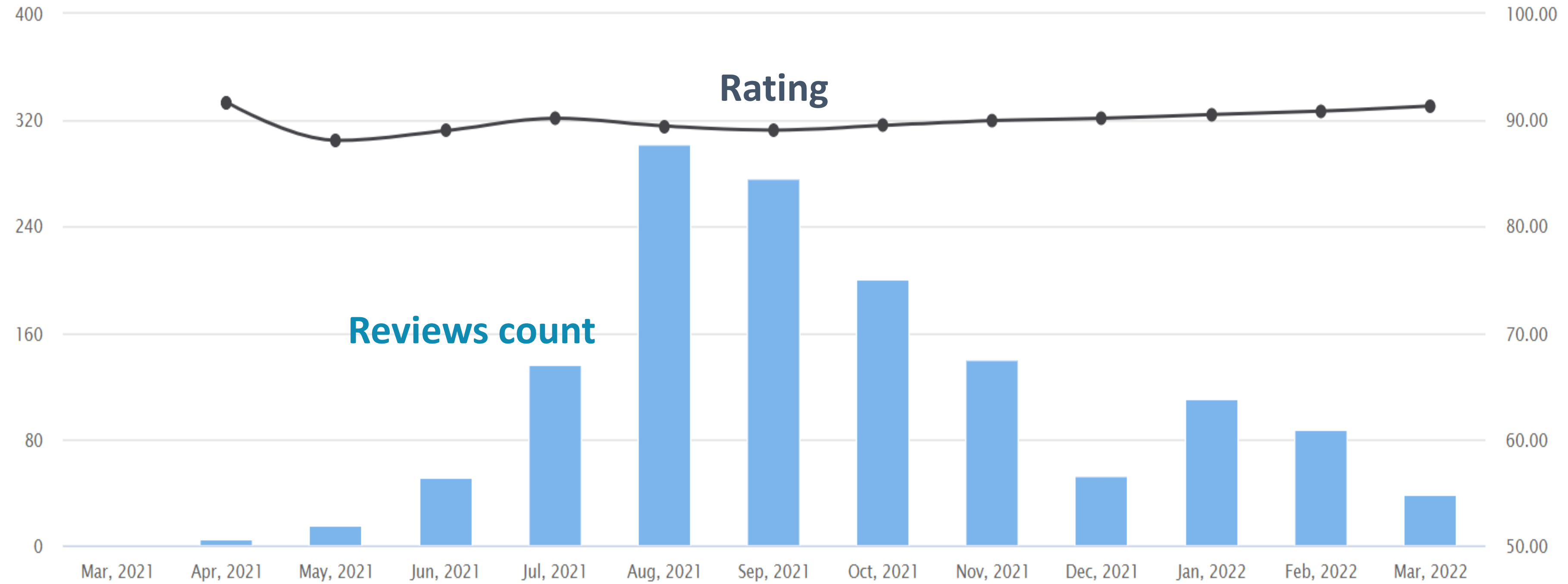


■ Adina ■ Avg Vienna

★
OVERALL RATING



🧴
SANITARY SAFETY



Response Rate to negative guests' comments

Best practise

Paris – *Caron de Beaumarchais* (9,2) A voyage hotel into the XIII Century

A total themed boutique hotel centered on a famous historical period and poet. All senses are activated to feel like you play in a movie staged two centuries ago



Cozy and romantic

By 852emanuelat on December 28, 2021

10

General

The position is perfect to fully enjoy the Marais quarter, the hotel is very close to brasseries, delicious boulangeries and lovely places to have coffees and croissants outside. There are interesting bookshops, pastry and chocolate shops near it, there are two metro stations only five minutes to the hotel (saint paul station and hotel de ville station) also, you can very easily find electric cars to rent. The hotel is a cozy jewel and everyone passing by can't help but staring at it because the colors and the upholstery bring you immediately in the XVIII century, that's why it's a very Instagrammable hotel. The personnel is very kind and helpful, if you get the room with the balcony you can have breakfast outside while enjoying the view on the street. A very important and noticeable thing is that is a pet friendly hotel obviously if your pet is educated and this brings five stars to this hotel. One more important thing about it is that it's very clean and the shower is perfect, especially after you've been outside the whole day, a perfectly working shower is what every tourist needs and many clean towels every day. The bath set is from Acqua di Parma, there are various pills, the room is very clean, comfy and cozy. Our stay was just perfect, I hope to come there back soon!

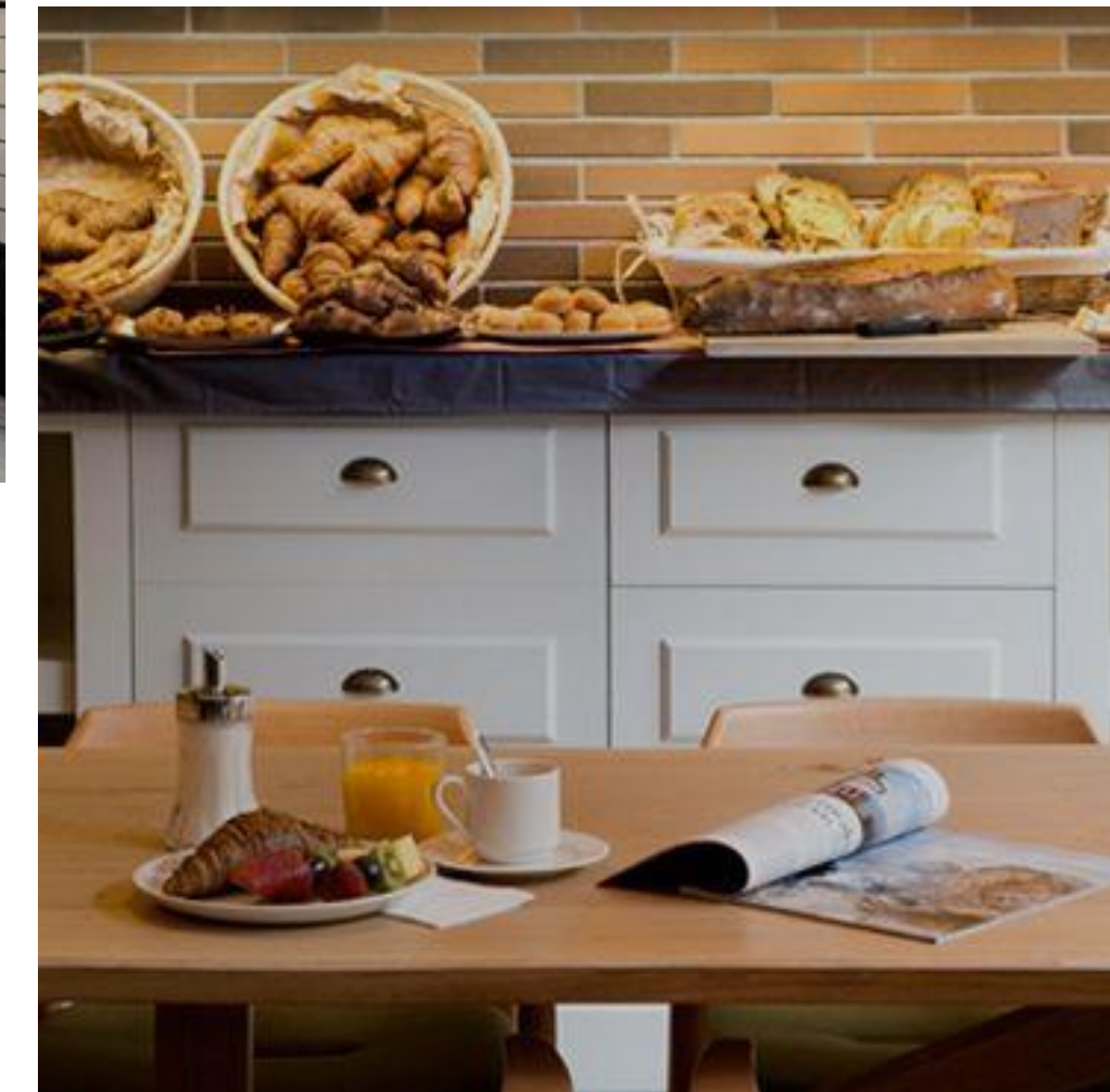


Best practise

Barcelona – Praktik Bakery Hotel (8,8)

A night in a bakery!

This hotel incorporates a high-quality bakery where you can taste delicious bread and pastries prepared in a traditional way. The hotel is located in the city center, close the Metro Diagonal.



Reviewed: 24 February 2022

Perfect location, bakery and staff

10

😊 · I loved it! Perfect location, kind & helpful staff, clean and cozy room, comfortable bed, huge shower, balcony with view of Sagrada Familia and the smell of fresh bread in the morning from the bakery was my favorite. I enjoyed every breakfast, everything was absolutely delicious. I can highly recommended and on my next Barcelona visit I will definitely stay there again!



Ljubljana – Youth Hostel Celica (8,8)

Welcome to your prison!

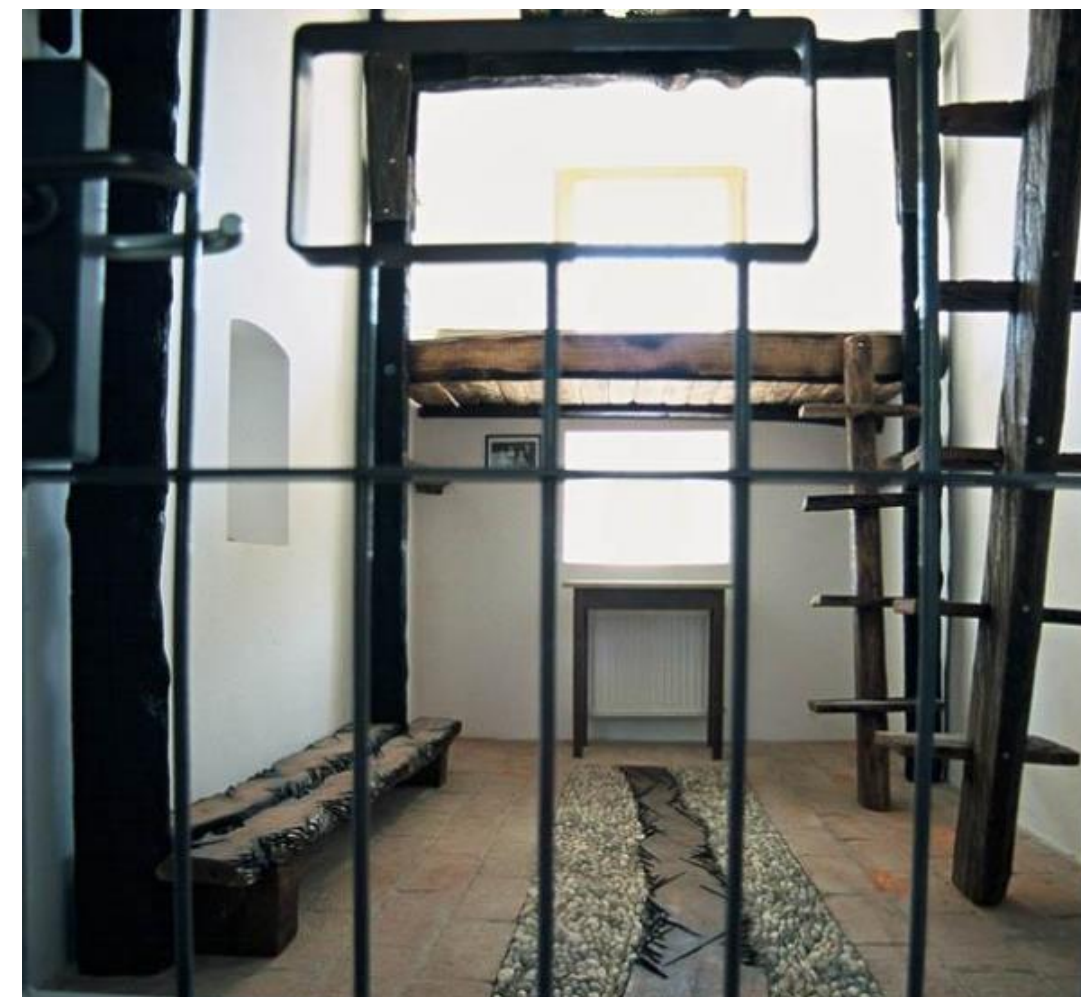
A former prison converted into a youth design hostel, which has kept all the atmosphere and gamify the hospitality experience as if you are a prisoner! Welcome to your cell!

★ **Reviewers' choice** Reviewed: 24 November 2021

Great Hostel Experience

10

😊 · Loved the unique prison aspects of the place. it made for a memorably stay. The staff was also incredibly friendly, possibly the most friendly I have encountered staying at hostels. It's a short walk from the hostel to both the train/bus stop, as well as the old town where the dragon bridge and castle are located. Recommend!



- Offer **more space for socializing** and selling a “**sense of place**” more than just a place to stay at
- **Better training/managing the “co-living” aspect between guests** for alleviating risks of tensions/frictions
- Importing more **hedonistic / self-indulging experiences** into the lodging: *food tasting, meet the artist, design...*
- **Going the extra miles** into the hospitality & guest support related to:
 - “Travel papers” in Covid Era (PLFs, Pass, Covid testing centers...)
 - Activities planning (what is closed/opened/restricted/booking...)
 - Mobility options for maximizing the full experience of revenge visitors
- Developing **high-end food experiences** for visitors with high spending power (est. 18% of international travellers)
- **Sustainability engagement** not optional anymore