



HotScore™ Analysis

Paris Five-Star Hotel Quality Benchmark

Executive Summary

May 2023 – May 2026

HotScore Analytics

— QUALITY. MEASURED BY GUESTS —

Introduction

HotScore™ (Hotel Score) is an independent guest-based quality benchmark for hotels, designed to reflect hotel performance through the lens of guest experience. It is calculated using a proprietary algorithm that aggregates and interprets ratings and reviews from major international platforms and online travel agencies (OTAs), allowing for a consistent and comparable view of performance over time.

The aim of the HotScore™ index is to identify the hotels that deliver the highest quality of service and overall experience within a destination.

The HotScore™ index is calculated after collecting and validating ratings for all relevant hotels within the defined scope (3-, 4- and 5-star properties) with 20 or more rooms.

The methodology incorporates multiple factors designed to account for differences in the underlying review data and the reliability of available guest feedback. Specific weightings and calculation rules are proprietary.

Importantly, the HotScore™ approach does not rely on juries or public voting. Instead, it is based solely on the collective evaluation of guests, who ultimately define the quality of experience within a destination.

For the purpose of this report, HotScore Analytics analysed 121,959 guest reviews across five major platforms, covering eligible five-star hotels in Paris with 20 or more rooms.

Key Findings

- Review volume reached its three-year peak in May 2024–May 2025, during the Olympic period.
- The Olympic period also recorded the highest average HotScore, while the latest period remained above the pre-Olympic baseline.
- Four Seasons Hotel George V remained the leading five-star hotel for three consecutive years.
- Global branding showed little market-wide HotScore premium, but global brands accounted for 70% of all Top 10 positions across the three years.
- The post-Olympic moderation differed sharply by hotel type, with independent hotels recording the largest decline in average HotScore.

Interpreting the Benchmark

Understanding the HotScore™ Benchmarking Model

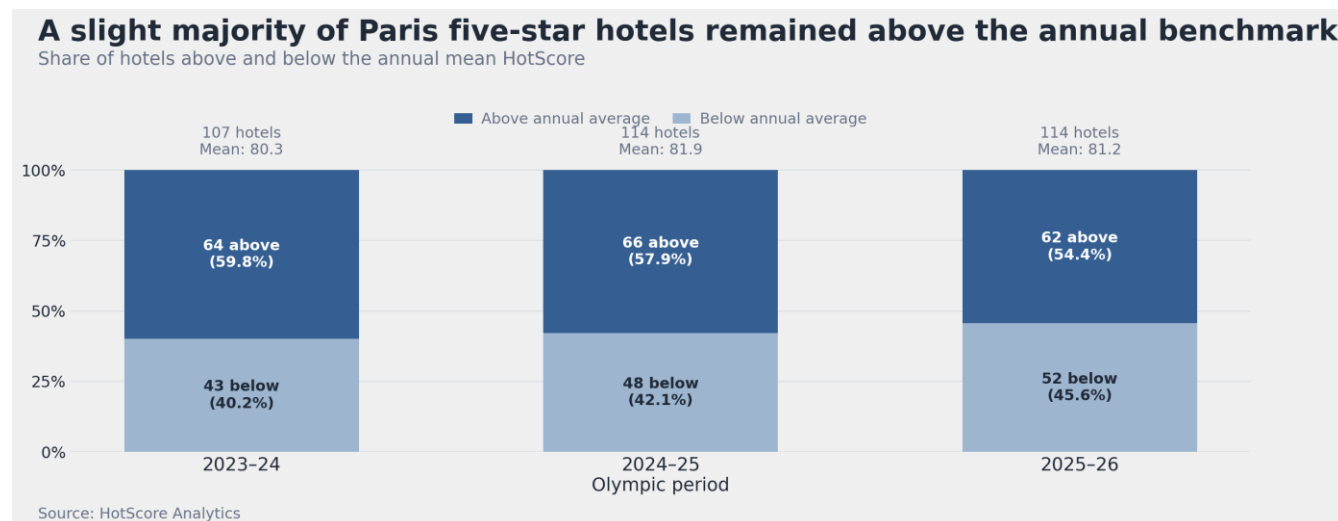
To ensure a fair and strategic evaluation of the destination's hospitality sector, the model operates on two fundamental levels:

1. Individual Performance (The HotScore™): Each property is assigned a unique HotScore™ based on a weighted analysis of direct guest feedback. This score represents the property's specific service quality and guest satisfaction level.
2. The Destination Benchmark (The Mean): The average HotScore across Paris five-star hotels serves as a reference point for evaluating hotel performance within the destination.

The distribution of hotels above and below this benchmark provides additional insight into the overall structure and maturity of the market.

Market Distribution and Consistency

The destination average provides a useful reference point, but the relationship between individual hotel scores and the market mean is equally important. Looking at how hotels are distributed around the benchmark helps show whether quality is broadly shared across the market or concentrated among a smaller group of leading properties.



Across the three periods analysed, a slight majority of Paris five-star hotels remained above the annual market benchmark: 64 of 107 hotels in 2023–2024, 66 of 114 in 2024–2025, and 62 of 114 in 2025–2026. This suggests a relatively balanced market in which strong performance is not limited to a very small group of outliers.

A more concentrated distribution — where a limited number of high-performing hotels sit well above the market average while a larger group remains below it — may indicate a greater degree of differentiation within the destination. In such cases, the overall benchmark can be influenced disproportionately by a relatively small group of market leaders.

A more balanced distribution — where hotels are more evenly spread around the average — suggests greater consistency across the market. This may indicate that quality standards are more broadly shared across the destination rather than being concentrated among a small number of exceptional properties.

Changes over time are particularly meaningful when the distribution is viewed together with the annual mean. If a larger share of hotels remains above benchmark while the destination average also rises, this can point to a broader improvement in guest-perceived quality. If the share narrows or declines, it may signal that quality gains are becoming more concentrated among the top-performing properties.

For this reason, the distribution should not be interpreted in isolation. Its value lies in showing how the structure of the market evolves over time — whether performance is becoming more consistent, more differentiated, or improving across a broader share of hotels.

Data Coverage and Review Volume

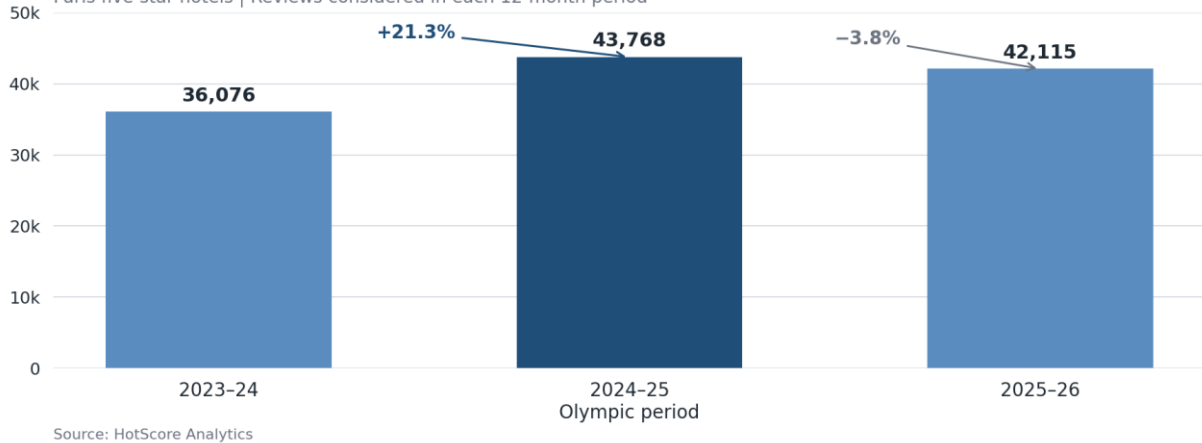
The HotScore results are based on a substantial volume of guest feedback collected over a three-year period, providing a reliable foundation for comparison and interpretation.

The first-year sample covered 107 hotels; the following two periods each covered 114, so the final two years offer the most directly comparable market view.

Period	Validated Reviews
May 2023 – May 2024	36,076
May 2024 – May 2025	43,768
May 2025 – May 2026	42,115

Review volume peaked during the Olympic period

Paris five-star hotels | Reviews considered in each 12-month period



Note: Review counts refer to reviews retained for analysis after validation and the exclusion of feedback flagged as potentially unreliable.

The volume of guest feedback collected across Paris's five-star hotel sector increased by 21.3% during the Olympic period compared with the previous 12 months, rising from 36,076 reviews in 2023–2024 to 43,768 reviews in 2024–2025.

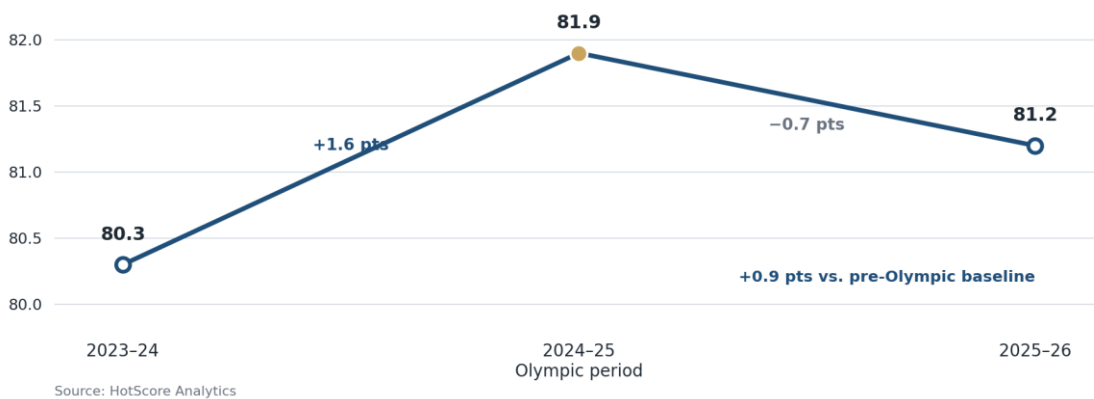
Despite the moderation in the latest period, review volume remained 16.7% above the pre-Olympic level, providing a robust base for benchmarking and destination-level analysis.

Overall Performance Overview

Period	Average HotScore
May 2023 – May 2024	80.3
May 2024 – May 2025	81.9
May 2025 – May 2026	81.2

Average HotScore reached a three-year high in the Olympic period

Paris five-star hotel market



The average HotScore across the hotels included in each annual evaluation moved from 80.3 to 81.9, before easing to 81.2 in the latest period.

The period encompassing the Paris 2024 Olympic Games recorded the highest average HotScore among the three years analysed, suggesting that the city's five-star hotel sector successfully maintained — and even enhanced — guest satisfaction despite unprecedented operational demands.

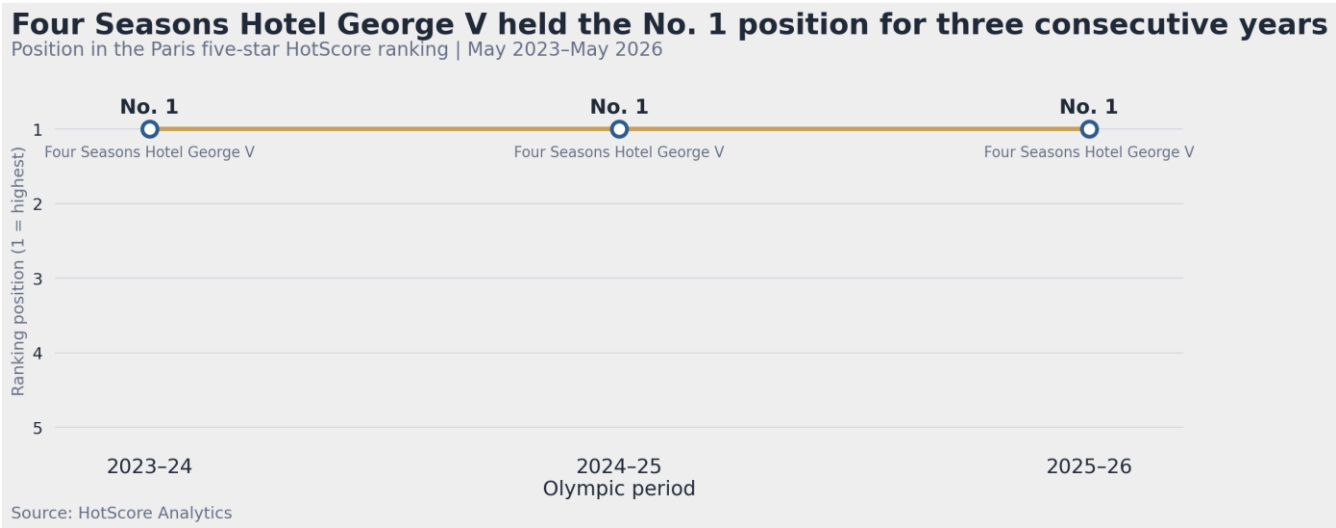
The data does not prove causality between the Olympic Games and hotel quality performance. However, it shows that during the Olympic period Paris five-star hotels reached their highest average HotScore over the three-year period analysed. In the following year, performance moderated slightly but remained above the pre-Olympic baseline.

OLYMPIC LEGACY The latest average HotScore remained 0.9 points above the pre-Olympic baseline.

Leadership at the Top

Four Seasons Hotel George V: Sustained Excellence

One of the clearest findings of the benchmark is the exceptional stability of Four Seasons Hotel George V at the top of the Paris five-star market. The property ranked No. 1 in all three annual evaluations, making it the market leader throughout the full period analysed.



In a market as deep and competitive as Paris, sustained leadership over three consecutive 12-month periods is a strong signal of operational consistency rather than a one-off result. It suggests that the hotel has been able to translate brand strength, service delivery and guest experience into repeatable performance over time.

George V's leadership also remained unchanged despite shifts in market conditions. The Olympic period lifted the destination average to its highest point in the three-year series, yet the identity of the market leader did not change. This indicates that the hotel's position was not simply a product of a favourable year, but part of a more durable performance pattern.

For Paris as a luxury destination, the presence of a stable top-performing flagship property matters beyond ranking optics. It reinforces the perception of quality at the upper end of the market and provides a useful reference point when assessing the consistency and competitiveness of the wider five-star segment.

LEADERSHIP SIGNAL Three annual evaluations. Three No. 1 finishes for Four Seasons Hotel George V.

Top 10 Stability

A stable core, with measured rotation around it

Across the three annual evaluations, 19 different hotels appeared across the 30 available Top 10 positions. This indicates that Paris has a competitive and relatively deep upper tier, but not an excessively volatile one.

A stable core of hotels remained in Paris's Top 10 across all three years			
Top 10 recurrence and ranking positions Paris five-star HotScore benchmark			
	2023-24	2024-25 Olympic period	2025-26
Four Seasons Hotel George V	1	1	1
The Peninsula Paris	6	2	4
Hotel Mandarin Oriental Lutetia Paris	2	5	6
Hotel Le Bristol	3	6	9
Hotel Grand Powers	5	7	-
Hotel de Crillon	8	4	-
Grand Hotel du Palais Royal	-	10	2
4 hotels remained in the Top 10 in all three years 19 unique hotels occupied the 30 Top-10 positions			
Note: The matrix shows hotels that appeared in the Top 10 in at least two of the three annual evaluations. An additional 12 hotels appeared only once.			
Source: HotScore Analytics			

Four hotels — Four Seasons Hotel George V, The Peninsula Paris, Hotel Mandarin Oriental Lutetia Paris and Hotel Le Bristol — remained in the Top 10 in all three years. This stable core points to sustained competitive strength and a high degree of performance consistency at the top of the market.

A second layer of continuity was provided by Hotel Grand Powers and Hotel de Crillon, which appeared in the first two periods, and by Grand Hotel du Palais Royal, which entered the Top 10 in 2024–2025 and moved up further in 2025–2026. Around this core, the composition of the Top 10 continued to evolve, with 12 hotels appearing only once across the three years analysed.

Year-to-year retention remained relatively high but showed moderate rotation: six hotels were retained from the 2023–2024 Top 10 into 2024–2025, while five were retained from 2024–2025 into 2025–2026. This suggests that Paris combines a stable leadership group with regular selective renewal among the remaining positions.

For destination benchmarking, this pattern is significant. It suggests that elite performance in Paris is not limited to a single dominant property, but is supported by a recognisable group of repeatedly high-performing hotels, alongside a competitive environment that still allows for movement and renewal within the Top 10.

Brand Structure and Guest-Perceived Quality

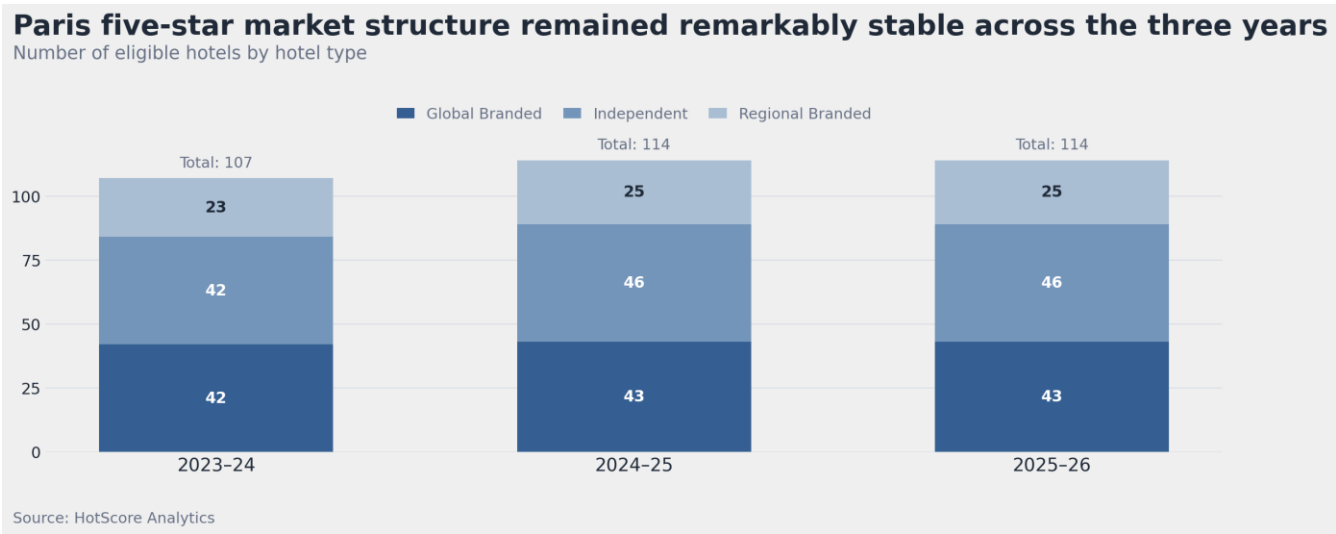
How hotel types are classified in this report

Global Branded — hotels operating under an internationally established hotel brand or group with a multi-country/global network.

Regional Branded — hotels operating under a hotel brand or group whose portfolio is primarily regional or national rather than global.

Independent — hotels not operating under a hotel brand. Membership in representation or luxury marketing networks such as SLH or LHW is treated as an affiliation and does not, by itself, reclassify a hotel as branded.

The structure of the eligible Paris five-star market remained notably stable across the three annual evaluations. Global branded and independent hotels each represented the largest parts of the market, while regional branded properties accounted for a smaller but consistent share.

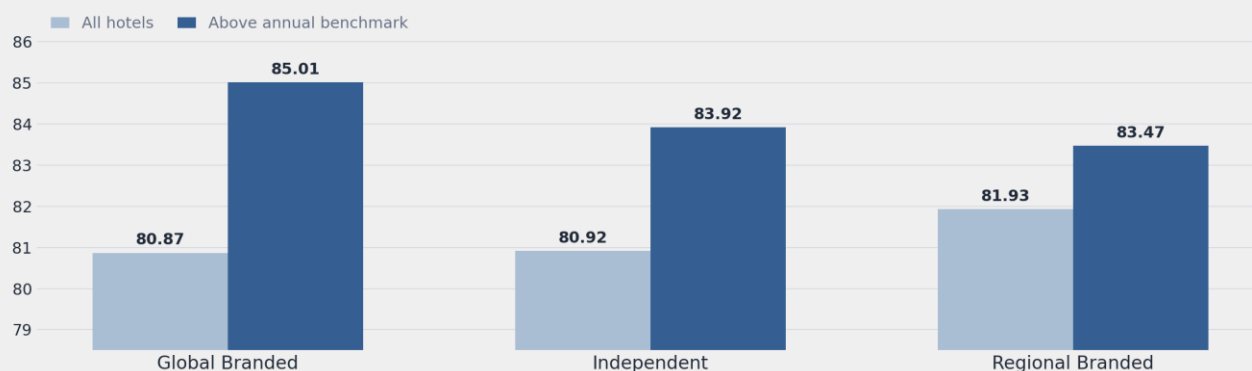


Does branding translate into stronger hotel performance?

Across the full three-year dataset, average HotScore levels were remarkably close between global branded and independent hotels. Global branded properties averaged 80.87, compared with 80.92 for independent hotels, while regional branded hotels recorded the highest combined average at 81.93. At market-wide level, therefore, international brand affiliation did not correspond to a clear guest-perceived quality premium.

The global-brand advantage becomes visible among stronger-performing hotels

Average HotScore | Three-year combined view

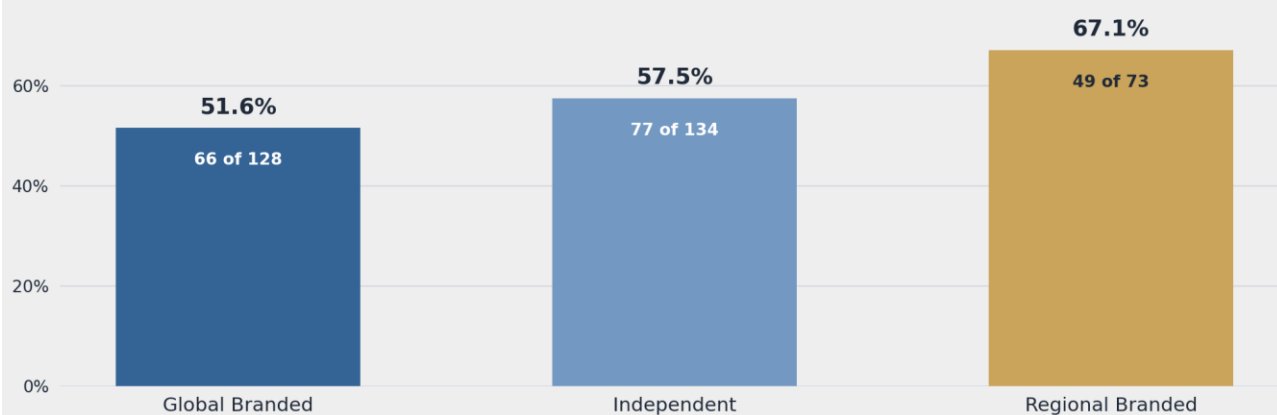


Source: HotScore Analytics

The picture changes when the analysis is restricted to hotels performing above the annual market benchmark. Within this stronger-performing cohort, global branded hotels achieved an average HotScore of 85.01, ahead of independent hotels at 83.92 and regional branded hotels at 83.47. The data therefore suggests that the global-brand advantage is more visible at the upper end of the market than across the market as a whole.

How often did each hotel type finish above the Paris five-star average?

Share of annual hotel observations above that year's mean HotScore | 2023-2026



How to read this: each hotel is counted once for each annual evaluation in which it appears.

Example: Global Branded = 66 above-average results out of 128 hotel-year observations across the three periods.

Source: HotScore Analytics

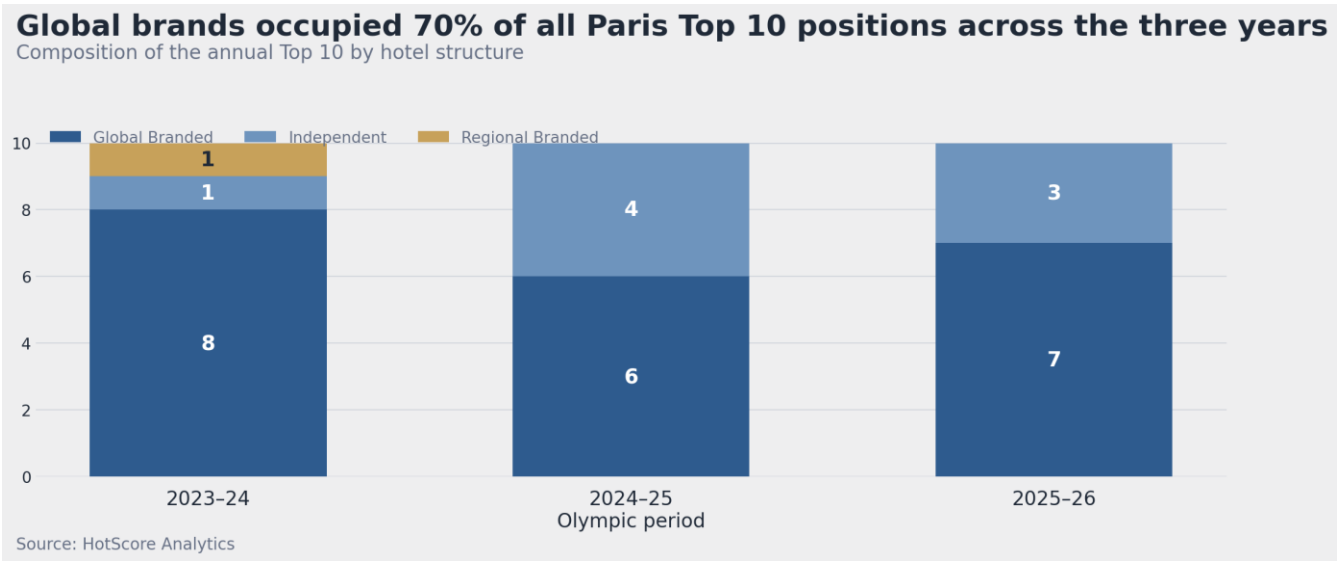
This comparison shows how often each hotel category finished above the Paris five-star average in the annual evaluations. Because the same hotel can be counted once in each year in which it appears, the denominator reflects total hotel-year observations rather than unique properties. For example, the global branded segment recorded 128 observations across the three periods and finished above the annual benchmark in 66 of them.

BRAND PARADOX Global branding showed almost no market-wide HotScore premium — yet global brands were strongest within the above-benchmark cohort.

Who Dominates the Paris Top 10?

Global brands and luxury collections are strongly represented at the top

The composition of the Top 10 shows a much stronger concentration of global brands than the market-wide averages alone would suggest. Across the 30 Top 10 positions available over the three years, 21 — or 70% — were occupied by global branded hotels. Independent hotels accounted for eight positions, while one position was held by a regional branded hotel.



The pattern was consistent across all three periods. Global branded hotels occupied eight of the ten positions in 2023–2024, six in 2024–2025 and seven in 2025–2026. This indicates that global brands have maintained a persistent presence at the very top of the Paris luxury market, even though their average HotScore across the full five-star segment is not materially higher than that of independent hotels.

The independent segment also reveals an important affiliation effect. Of the eight Top 10 positions held by independent hotels over the three years, five were occupied by properties affiliated with Small Luxury Hotels of the World and two by members of The Leading Hotels

of the World. Only one independent Top 10 position was held by a hotel without either of these affiliations.

Taken together, global branded hotels and independent properties affiliated with SLH or LHW accounted for 28 of the 30 Top 10 positions — 93.3% of the total. This does not demonstrate that affiliation itself causes higher guest satisfaction, but it does show that the upper end of the Paris five-star benchmark is heavily concentrated among globally recognised brands and luxury hotel networks.

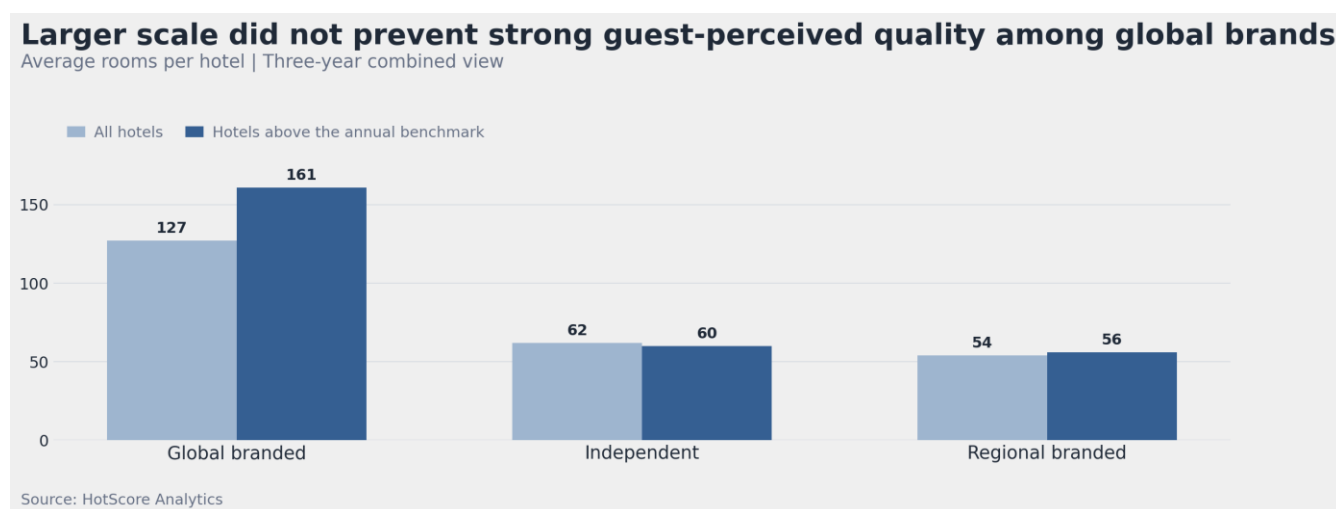
The contrast with the wider market is notable: branding alone does not produce a clear market-wide HotScore premium, yet global brands and collection-affiliated independents are disproportionately represented among the highest-ranked hotels. This suggests that brand and network affiliation may matter most when combined with already strong operational execution and guest experience delivery.

TOP-10 CONCENTRATION 93.3% of all Top 10 positions went to global brands or independent hotels affiliated with SLH or LHW.

Scale vs. Quality

Does a larger luxury hotel face an inherent guest-experience disadvantage?

The Paris data does not support a simple assumption that smaller luxury hotels necessarily achieve stronger guest-perceived quality. The clearest evidence comes from the global branded segment, where the hotels performing above the annual market benchmark were substantially larger than the market average for their group.



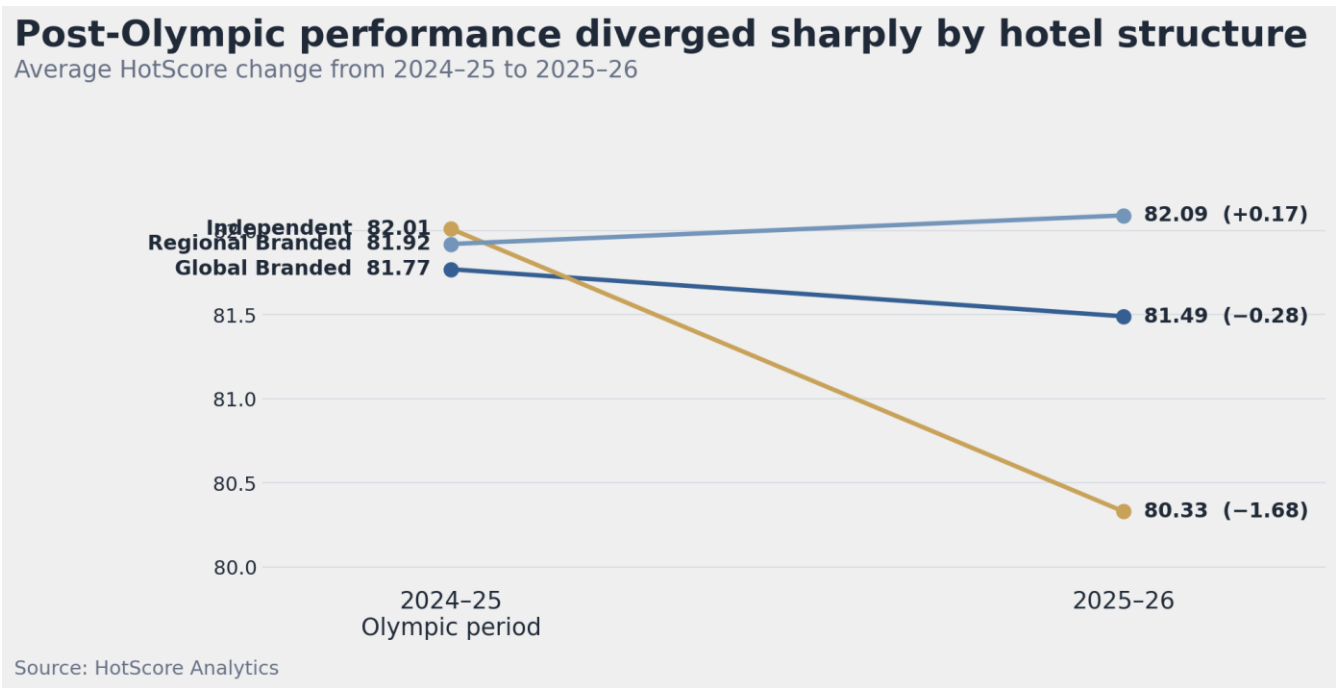
Across the three-year combined view, global branded hotels averaged 127 rooms, while those in the above-benchmark cohort averaged 161 rooms. By comparison, above-benchmark independent hotels averaged 60 rooms and regional branded hotels 56 rooms.

The data does not establish that scale improves quality. It does, however, indicate that scale is not an automatic barrier to high guest satisfaction when strong operating systems, brand standards and service delivery are in place. In Paris, some of the strongest global branded performers are also among the larger properties in the market.

After the Olympic Peak

Performance moderated differently across hotel structures

The overall Paris five-star average declined from 81.9 during the Olympic period to 81.2 in 2025–2026. The market-wide movement, however, masks materially different trajectories among global branded, independent and regional branded hotels.



Global branded hotels eased only modestly, from 81.77 to 81.49. Regional branded hotels moved slightly higher, from 81.92 to 82.09. Independent hotels recorded the most pronounced change, declining from 82.01 to 80.33.

This divergence suggests that the post-Olympic moderation was not a uniform market correction. The independent segment contributed disproportionately to the decline, while global and regional branded hotels showed greater stability. The data identifies a structural difference in performance patterns, but does not by itself establish the operational causes behind it.

POST-OLYMPIC SPLIT Independent –1.68 pts | Global branded –0.28 pts | Regional branded +0.17 pts

Five Findings from the Paris Benchmark

Taken together, the three annual evaluations reveal a market that combines high quality, resilient demand-side feedback and intense competition at the top. Five findings stand out:

- 1. Quality held up under exceptional demand.** The Olympic period produced both the highest review volume and the highest average HotScore in the three-year series.
- 2. Part of the Olympic-period gain was retained.** Average HotScore eased in 2025–2026, but remained above the pre-Olympic baseline, as did review volume.
- 3. Leadership at the very top is unusually stable.** Four Seasons Hotel George V ranked No. 1 in all three annual evaluations, while four hotels remained in the Top 10 throughout the full period.
- 4. Brand affiliation matters most at the top, not across the whole market.** Global branded and independent hotels had almost identical market-wide average HotScores over the three years, yet global brands occupied 70% of all Top 10 positions.
- 5. Paris combines a stable elite with meaningful competitive renewal.** Nineteen different hotels occupied the 30 available Top 10 positions, showing that the upper tier is competitive even as a recognisable core of leaders persists.

Beyond the Executive Report

This public executive report presents selected destination-level findings from the HotScore Paris dataset. The underlying analysis supports deeper property-, brand- and competitor-level benchmarking that is intentionally not reproduced in full here.

Further analysis can include:

- Full hotel ranking and individual HotScore positions
- Year-on-year movement and performance consistency by property
- Custom competitor-set benchmarking
- Detailed brand and collection comparisons
- Market segmentation by hotel size and structure
- Destination-level benchmarking across cities and markets
- Bespoke analysis for hotel groups, investors, consultants and destination organisations

HotScore Analytics uses aggregated guest feedback to identify patterns that are difficult to observe through individual platform ratings alone. The objective is not only to rank hotels, but to provide a consistent analytical framework for understanding quality, competitive position and change over time.

Interpretation note HotScore results describe observed patterns in guest-perceived hotel performance. Comparisons between hotel structures, brands, size groups or time periods should be interpreted as associations within the analysed dataset and not as evidence of causality.

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