

# Hotel

# Rankings 2023



# Who has staying power with American travelers in 2023?

As business travel continues its slow rebound toward pre-pandemic levels, leading hotel brands are putting their marketing activities into full thrust to win back high-value customers.

YouGov's 2023 US Hotel Rankings provides not only a master view of brand consideration, but also a floor-level picture of which brands are doing best with which target consumer segments.

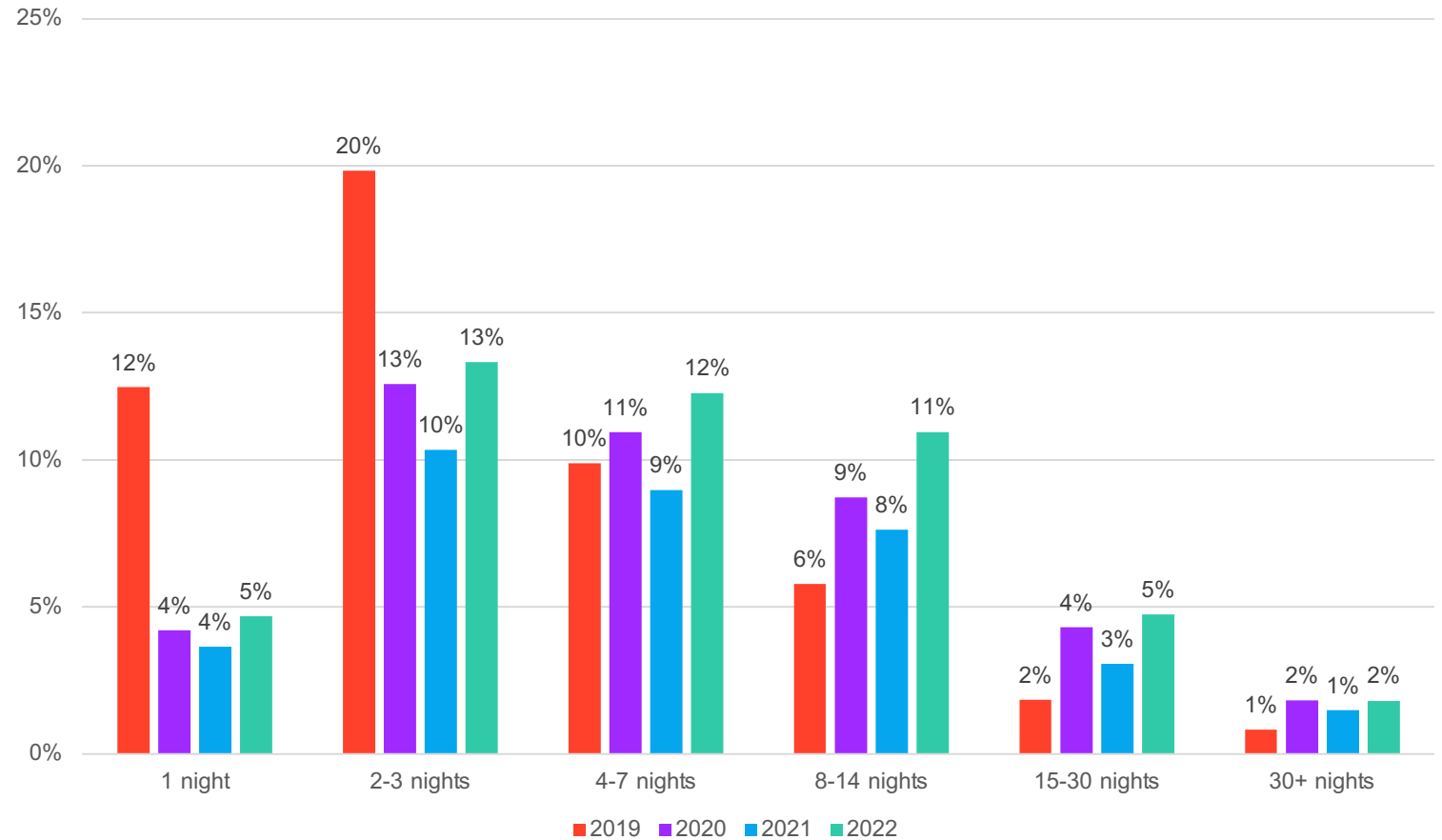
The report starts with an overview of hotel booking trends since 2019 before delving into an up-to-date view of hotel consideration across the general population, business travelers, leisure travelers, high income travelers, guests with 15+ stays annually, and younger Americans.

# Hospitality Rebounds

Frequency of hotel stays rebounded strongly in 2022, with significant upticks in Americans who stayed 8+ nights during the year (17% in 2022 vs 12% in 2021).

Americans reporting no hotel stays decreased from 63% in 2021 to 50% in 2022, as guests continued to return post-COVID.

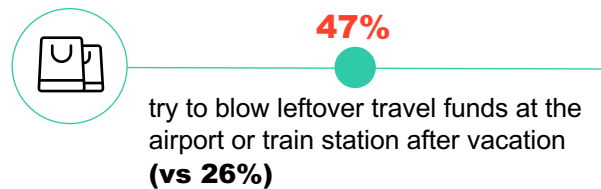
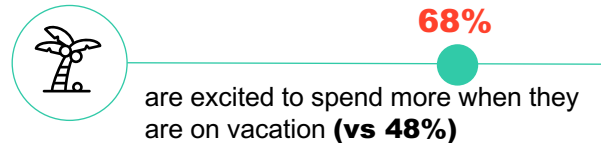
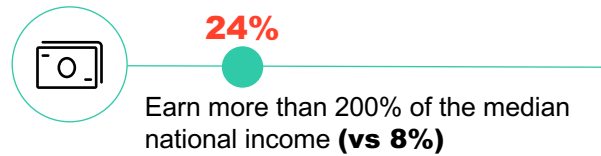
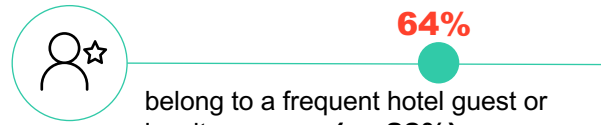
## Hotel Nights per Year (All Americans)



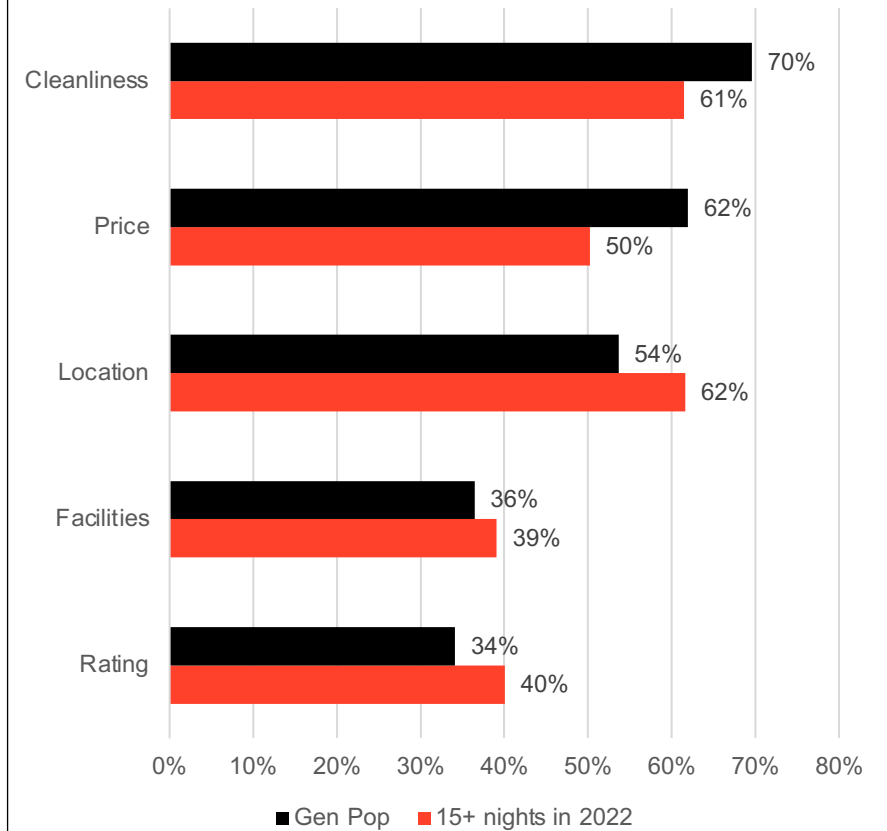
# Frequent Guests

Americans who stayed 15+ nights at a hotel in 2022 are seeking great locations with nice facilities and higher ratings than a low price.

They are generally high-earners and like to spend money on vacation.



### Reason for selecting hotels



# US General Population Ranking

Rank	Brand	2022 Score	Change in Score (vs 2021)
1	Courtyard by Marriott	41.6	+0.1
2	Marriott	40.8	+1.0
3	Holiday Inn Express	38.7	-1.1
4	Holiday Inn	37.7	-0.7
5	Hilton Garden Inn	37.7	-0.4
6	Hampton Inn	36.1	-0.1
7	Hilton	35.5	+1.3
8	DoubleTree by Hilton	34.3	+3.7
9	Best Western	33.8	-0.6
10	Kimpton	32.7	-0.6

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## Most Considered Hotels

Marriott International leads the way in our US Hotel consideration rankings, with its Courtyard by Marriott and Marriott brands taking the top two spots.

The Holiday Inn Express and Holiday Inn saw declines in consideration but hold on to numbers three and four, respectively.

YouGov BrandIndex: Brands ranked by Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022; Change in Score measured between that time and the previous twelve months. (N=2400-22000)

# Top hotel brands for each BrandIndex metric in 2022

Measure and track hotel brand use and perception daily

## Media & comms

### Aided Awareness: Holiday Inn

*Are you aware of the brand?*

### Ad Awareness: Hilton

*Have you seen recent advertising?*

### Word of Mouth Exposure: Kimpton

*Have you recently spoken about the brand?*

### Buzz: Kimpton

*Have you heard anything positive or negative about the brand in the last two weeks?*

### Attention: Trump Hotels

*Derived from positive plus negative buzz*

## Brand perception

### Impression: Marriott

*Do you have a positive or negative view of the brand?*

### Quality: Marriott

*Is the brand of good or poor quality?*

### Value: Holiday Inn Express

*Does the brand offer good or poor value for money?*

### Reputation: Waldorf-Astoria

*Would you be proud or embarrassed to work for this brand?*

### Satisfaction: Courtyard by Marriott

*Are you a recently satisfied/dissatisfied customer of the brand?*

### Recommend: Marriott

*Would you recommend this brand to a friend or tell them to avoid it?*

## Purchase funnel metrics

### Consideration: Courtyard by Marriott

*When you are in the market next to make a purchase, which brands would you consider?*

### Purchase Intent: Holiday Inn Express

*Of the brands considered, which are you most likely to purchase?*

### Former Customer: Holiday Inn

*Have you ever purchased the brand?*

### Current Customer: Marriott

*Are you a recent customer?*

# Most Improved Hotels Ranking

Rank	Brand	2022 Score	Change in Score (vs 2021)
1	InterContinental (IHG)	31.7	+6.2
2	DoubleTree by Hilton	34.3	+3.7
3	Aloft	30.9	+1.8
4	Hilton	35.5	+1.3
5	Omni Hotels	23.3	+1.3
6	Hotel Indigo	25.8	+1.1
7	Marriott	40.8	+1.0
8	Grand Hyatt	24.3	+0.8
9	Ritz-Carlton	19.5	+0.6
10	Hyatt House	21.1	+0.6

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## Biggest Movers in 2022

InterContinental Hotel Group traveled the most distance in 2022, while Aloft, Omni Hotels, Hotel Indigo, Grand Hyatt, Ritz-Carlton and Hyatt House all also checked-in to the top ten.

YouGov BrandIndex: Brands ranked by Change in Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022 vs the previous twelve months. (N=3200-22000)

# US Business Travelers Ranking

Rank	Brand	2022 Score	2021 Score	Rank Change
1	Marriott	48.4	46.2	-
2	Courtyard by Marriott	44.8	44.7	-
3	Hilton	44.4	42.7	-
4	Hilton Garden Inn	44.1	42.7	-
5	Holiday Inn Express	42.3	40.8	-
6	Hampton Inn	39.8	40.8	-
7	JW Marriott	39.4	37.7	+1
8	InterContinental (IHG)	38.8	27.8	+27
9	DoubleTree by Hilton	38.2	35.3	+3
10	Holiday Inn	37.8	40.2	-4

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## Most Considered Hotels

Among Business Travelers, Marriott properties remain in the penthouse, but Hilton and Hilton Garden Inn upgraded their rankings when compared with the general population.

InterContinental was the biggest gainer, entering the top 10 for business guests.

YouGov BrandIndex: Brands ranked by Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022, with additional filtering by Business Travelers via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>850)



# US Leisure Travelers Ranking

Rank	Brand	2022 Score	2021 Score	Rank Change
1	Marriott	44.4	42.5	+1
2	Courtyard by Marriott	44.4	43.1	-1
3	Holiday Inn Express	41.7	41.6	-
4	Hilton Garden Inn	40.9	40.0	-
5	Hampton Inn	40.6	39.0	+1
6	Holiday Inn	38.4	39.7	-1
7	Hilton	38.4	36.8	-
8	DoubleTree by Hilton	36.1	33.0	+3
9	Best Western	35.1	35.2	-2
10	Embassy Suites	34.0	33.5	-1

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## Most Considered Hotels

Among Leisure Travelers, Marriott and Courtyard by Marriott traded places in the penthouse position.

Hampton Inn and DoubleTree by Hilton also saw rank increases, while eight of the top ten saw overall increases in Consideration scores among Leisure Travelers.

YouGov BrandIndex: Brands ranked by Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022, with additional filtering by Leisure Travelers via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>5700)

# US High Income Travelers Ranking

Rank	Brand	2022 Score	2021 Score	Rank Change
1	Marriott	55.0	54.9	-
2	Courtyard by Marriott	53.2	50.2	-
3	Hilton	48.9	48.6	-
4	Hilton Garden Inn	47.9	46.1	-
5	JW Marriott	44.8	41.7	+1
6	Hampton Inn	43.0	42.0	-1
7	DoubleTree by Hilton	41.0	35.2	+9
8	Holiday Inn Express	39.3	37.1	+1
9	Embassy Suites	39.0	39.3	-2
10	InterContinental (IHG)	38.8	31.2	+16

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## Most Considered Hotels

Looking at High Income Travelers, DoubleTree by Hilton and IHG snagged the express elevator, increasing by 9 and 16 positions respectively with Americans who reported making 200% or more than the median income.

YouGov BrandIndex: Brands ranked by Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022, with additional filtering by Leisure Travelers and Income 200%+ higher than the median via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>500)

# Frequent Hotel Guests Ranking

Rank	Brand	2022 Score	2021 Score	Rank Change
1	Marriott	53.0	48.3	+4
2	Courtyard by Marriott	49.5	49.2	+2
3	JW Marriott	47.3	43.9	+7
4	Hampton Inn	46.3	54.3	-3
5	Hilton	45.7	55.4	-5
6	Hilton Garden Inn	45.7	54.0	-4
7	Holiday Inn Express	44.0	45.2	-1
8	Kimpton	41.1	32.1	+21
9	InterContinental (IHG)	41.0	28.1	+30
10	Sheraton	38.5	36.5	+7

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## Americans who stayed in a hotel 15 nights or more

Marriott takes over Hilton's room on top floor of our rankings with Americans who stayed 15+ nights in a hotel in 2022. Courtyard by Marriott and JW Marriott also see noticeable upgrades.

IHG and their luxury brand Kimpton also saw significant increases in consideration.

YouGov BrandIndex: Brands ranked by Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022, with additional filtering by Americans reporting 15+ stays in a hotel via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N>5700)

# Americans Aged 18-34 Ranking

Rank	Brand	2022 Score	2021 Score	Rank Change
1	Marriott	46.0	45.3	-
2	Hilton	44.4	40.9	+2
3	Courtyard by Marriott	44.4	44.8	-1
4	DoubleTree by Hilton	40.2	38.2	+5
5	Holiday Inn	39.8	42.0	-2
6	InterContinental (IHG)	39.3	32.7	+18
7	Holiday Inn Express	37.2	38.9	-1
8	Hilton Garden Inn	36.9	40.9	-3
9	Best Western	36.0	37.5	+1
10	Hyatt	35.5	37.2	+2

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## Most Considered Hotels

Marriott remains atop the consideration rankings for Americans aged 18-34, though Hilton made big strides to close the gap, increasing in consideration by 3.5 percentage-points with this increasingly affluent group of young Americans. IHG also made big strides.

As it has a different operating model and business type than hoteliers, Airbnb was excluded from these rankings. However, the short-term rental listings company also has a strong presence in the consideration set for Americans aged 18-34.

YouGov BrandIndex: Brands ranked by Average Consideration score among Aware audiences between January 1, 2022 and December 31, 2022, with additional filtering by age via YouGov Profiles; Change in Rank measured between that time and the previous twelve months. (N=1000-4000)

# Methodology

This report sheds light on the hotels considered by Americans who are likely to be in-market for travel in 2023. To do this, YouGov analyzed hotel survey data from more than 20,000 respondents between Jan. 1 and Dec. 31, 2022, comparing against 2021 to gauge trends.





Additional filters from YouGov Profiles identified consumers who traveled for business or leisure in 2022, as well as their income levels, age and frequency of staying in hotels.

By connecting brand health data from [YouGov BrandIndex](#) and audience intelligence data from [YouGov Profiles](#), we're able to accurately measure changing consumer attitudes towards hotel brands with unrivaled granularity.

Hotels must have been tracked for all of 2021 and 2022 to appear in the rankings. Short-term rental services like Airbnb and VRBO were excluded from this ranking. All data in this report comes from aware audiences.





# Want a deeper analysis?

**YouGov BrandIndex** tracks 16 key brand health metrics including:

-  Ad Awareness
-  Aided Awareness
-  Customer Satisfaction
-  Value



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-  Booking and travel plans by month
-  Booking methods
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# Thank you

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