

Opinions

Benchmarking hotel guest satisfaction and experiences

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The American Customer Satisfaction Index (ACSI) is an important benchmark to evaluate the quality of services provided by hotels and guest experience with various aspects of their hotel stay. The article summarizes the ACSI scores for the hotel industry and major hotel brands in 2017 and 2018.



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Guest satisfaction with hotels for the past two years has been stable, with an average American Customer Satisfaction Index (ACSI) score of 76 (on a scale of 0 to 100).

These scores have remained relatively stable (varying only +/-1%) across the 10 hotel companies evaluated as well. However, a wide dispersion of scores is noted when reviewing the scores across the hotel companies.

ACSI: Hotel Brands

Brand	Type*	Parent	2018
AC Hotels by Marriott	Upscale	Marriott	84
Hilton Garden Inn	Upscale	Hilton	83
Embassy Suites by Hilton	Upper Upscale	Hilton	82
Hampton by Hilton	Upper Midscale	Hilton	82
Hilton Hotels & Resorts	Upper Upscale	Hilton	82
JW Marriott	Luxury	Marriott	82
Courtyard by Marriott	Upscale	Marriott	81
Fairfield Inn & Suites by Marriott	Upper Midscale	Marriott	81
Marriott Hotels	Upper Upscale	Marriott	81
Crowne Plaza Hotels & Resorts	Upscale	InterContinental	80
Westin	Upper Upscale	Starwood (Marriott)	80
Bestwestern Premier	Upscale	Best Western	79
Candlewood Suites	Midscale	InterContinental	79
Hyatt Place	Upscale	Hyatt	79
Sheraton	Upper Upscale	Starwood (Marriott)	79
Baymont Inn & Suites	Midscale	Wyndham	78
Best Western Plus	Upper Midscale	Best Western	78
Hyatt Regency	Upper Upscale	Hyatt	78
DoubleTree by Hilton	Upscale	Hilton	77
Holiday Inn Express	Upper Midscale	InterContinental	77
Best Western	Midscale	Best Western	76
Holiday Inn	Upper Midscale	InterContinental	76
La Quinta Inns & Suites	Midscale	La Quinta	76
Wyndham Hotels and Resorts	Upscale	Wyndham	76
Comfort Inn, Comfort Suites	Upper Midscale	Choice	75
Residence Inn by Marriott	Upscale	Marriott	75
Econo Lodge	Economy	Choice	73
Ramada	Midscale	Wyndham	67
Super 8	Economy	Wyndham	67
Quality	Midscale	Choice	66
Days Inn	Economy	Wyndham	65
Motel 6	Economy	G6 Hospitality	65

*Lodging type assigned per industry standards.

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ACSI (0-100 Scale)

The high-scoring companies for the two years include Hilton, Marriott International, Starwood Hotel & Resorts Worldwide and Hyatt Hotels Corporation. These hotel companies have a diversified portfolio of hotel brands ranging from luxury to upper midscale, leaning more towards the upper price range.

Hilton took top honors this year with a score of 82, followed closely by Marriott with a score of 81. Starwood ranked third (tied with Hyatt), at 79; as it is now part of the Marriott family, it will be interesting to watch Marriott's management of guest experiences in their very large and diversified brand portfolio.

The companies ranking relatively low in customer satisfaction had scores ranging from 77 (InterContinental Hotels Group, Best Western) to a low of 65 (G6 Hospitality). The common feature of these companies is that their portfolio of hotel brands is narrower and focused mainly on the lower price range, from midscale to economy.

ACSI: Hotels

Company	2017	2018	% Change
Hotels	76	76	0.0%
Hilton	81	82	1%
Marriott	80	81	1%
Hyatt	80	79	-1%
Starwood (Marriott)	79	79	0%
Best Western	76	77	1%
InterContinental	78	77	-1%
La Quinta	75	76	1%
All Others	74	75	1%
Choice	74	73	-1%
Wyndham	71	70	-1%
G6 Hospitality (Motel 6)	65	65	0%

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ACSI (0-100 Scale)

The above chart drills down further into the specific hotel brand scores and provides further insights into the performance of hotels regarding customer satisfaction.

The top scoring hotel brand for 2018 was AC hotels by Marriott (an ACSI of 84). AC is an upscale, European-inspired, design-centric lifestyle brand which Marriott acquired in 2013 from a Spanish company. The company's high score speaks to the broader trend of growing customer interest in lifestyle and unique properties, driven largely by a younger customer base, with the willingness to spend experiment.

However, one should not discount the staple brands preferred by the baby boomers, such as Hilton Garden Inn (83), Embassy Suites (82), Hampton (82), Hilton Hotels & Resorts (82) and JW Marriott (82), which also had top scores.

When reviewing the individual brand scores, some interesting insights emerge.

High scores are not necessarily a function of chainscale. For example, one upscale hotel (Hilton Garden Inn) scored higher in satisfaction than all of the upper-upscale and even luxury hotels. This points to the basic premise of the ACSI model, in that satisfaction is function of both guest expectations (prior to their arrival) and the guest experience during their stay, including both service quality and the value proposition.

Larger and full-service hotels such as Hilton Hotels, JW Marriott, Crowne Plaza, for example, had lower scores than some properties with more limited amenities such as AC hotels, Hilton Garden Inn, Embassy Suites and Hampton Inn.

These findings suggest that perhaps more amenities might result in management control issues with regard to guest services.

Furthermore, within the same brand family, an upper midscale brand such as Fairfield Inns and Suites performed better than Residence Inn by Marriott, an upscale brand. This could have perception implications for franchisees looking to develop hotels and the attractiveness of one brand vis-a-vis the development costs.

Finally, not surprisingly the midscale and economy scale hotels tended to have lower ACSI scores, ranging from an ACSI of 78 (Baymont Inn) to 65 (both Days Inn and Motel 6). The portfolio footprint of these hotels tends to be more widely dispersed, both geographically and in the types of owners, who tend to be individuals versus institutions for the more upper-tiered hotels.

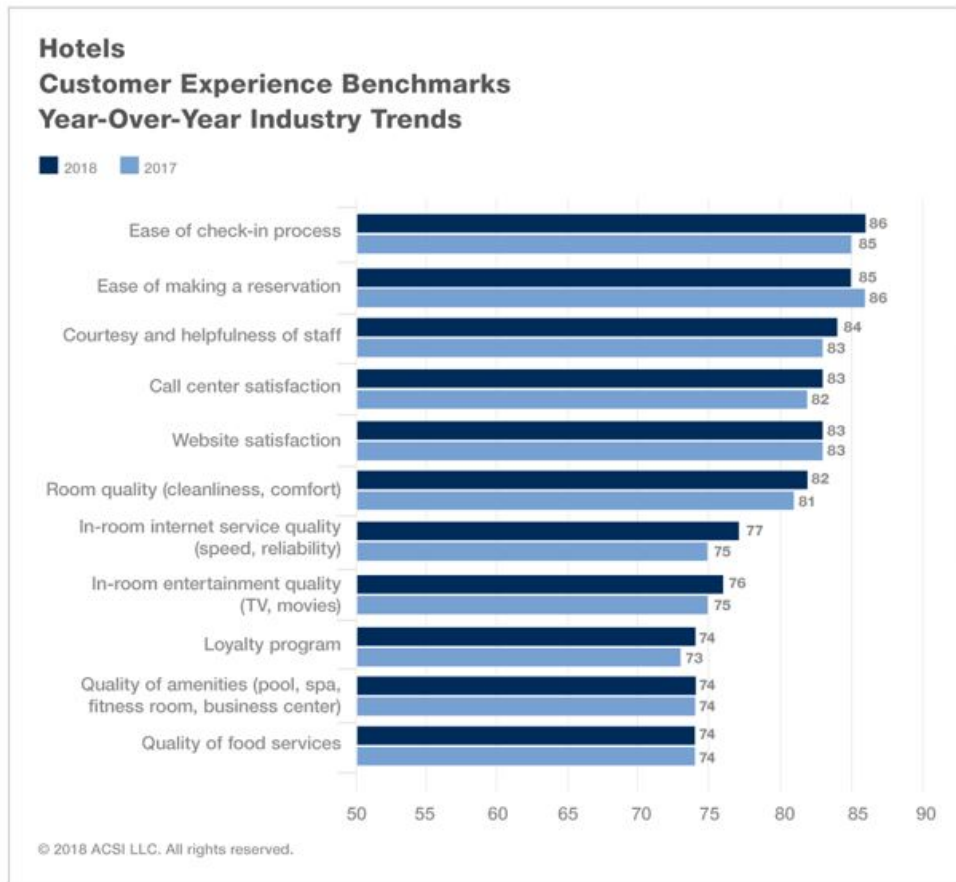
Hotel guests are a powerful source of word-of-mouth advertising, marketing and sharing feedback about negative (and positive) service experiences. This exposure is further leveraged by instant feedback via multiple social media platforms.



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The above chart illustrates the customer experience benchmarks across 11 important measures of the guest experience. It is important to note that the first point of contact with the hotel through the reservation and check-in processes had high scores of 85 and 86.

This is a positive signal that the industry is paying attention to the impact of first impressions.

The hardest and most impactful complaints by guests tend to be about staff attitudes. Hotels performed well with scores of 83 and 84. Other remote experiential touchpoints of call center and web interface are also very important, and here the scores were high.

However, website satisfaction remained static. As customers make more and more purchases of goods and services via e-commerce platforms, hotels should stay alert to changing customer expectations with ongoing improvements to website design.

While guests appreciate the extra touches provided by hotels, expectations for a clean, comfortable room, with good connectivity and in-room entertainment are basic needs. Based on the ACSI benchmarks, rooms are cleaner and more comfortable (82), in-room entertainment is better (76) and wireless speed and reliability has improved (+2% to 77). The lowest scores for guest experiences include quality of amenities, quality of food service and loyalty programs.

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