

Benchmarking **Hotel & Hospitality** CX Metrics in the **U.S., Q4 2025**

Comparing **key customer experience performance indicators**

Overview

The following report evaluates the state of customer experiences in the United States during the fourth and final quarter of 2025 and compares it to past quarters of the year. The survey was conducted online with a sample of 1,001 participants, all of whom are involved in household purchasing decisions.

By analyzing seven key industries in the U.S., the report provides a clear picture of customer loyalty, satisfaction & purchase intent and highlight which brands are excelling in customer experience. To ensure reliable and accurate insights, only brands that met the minimum required number of responses were included in the analysis.

By year-end, a synchronized correction swept across all sectors, marking a universal reset that erased the record-high gains seen during the third quarter of 2025. This dramatic collapse was fueled by a combination of economic fatigue and the operational strain of the holiday season, which pushed customer tolerance to its lowest collective point of the year.

Hotel and Hospitality led the rankings with the highest Net Promoter Score (38) and Customer Satisfaction rating (80%). Conversely, the Automotive sector experienced the most severe volatility, ending with the lowest performance in both NPS (12) and CSAT (65%).

A universal "summer peak, winter crash" pattern emerged, as interest rate hikes and holiday operational pressures drove customer tolerance to yearly lows.

The report reveals a strong correlation between operational consistency and resilience; essential service providers like Banking and Grocery declined less severely than discretionary categories.

In Q4, consumers prioritized value maximization and reliability, rewarding brands like Costco while punishing those that faltered under economic fatigue.

About the Key Performance Indicators

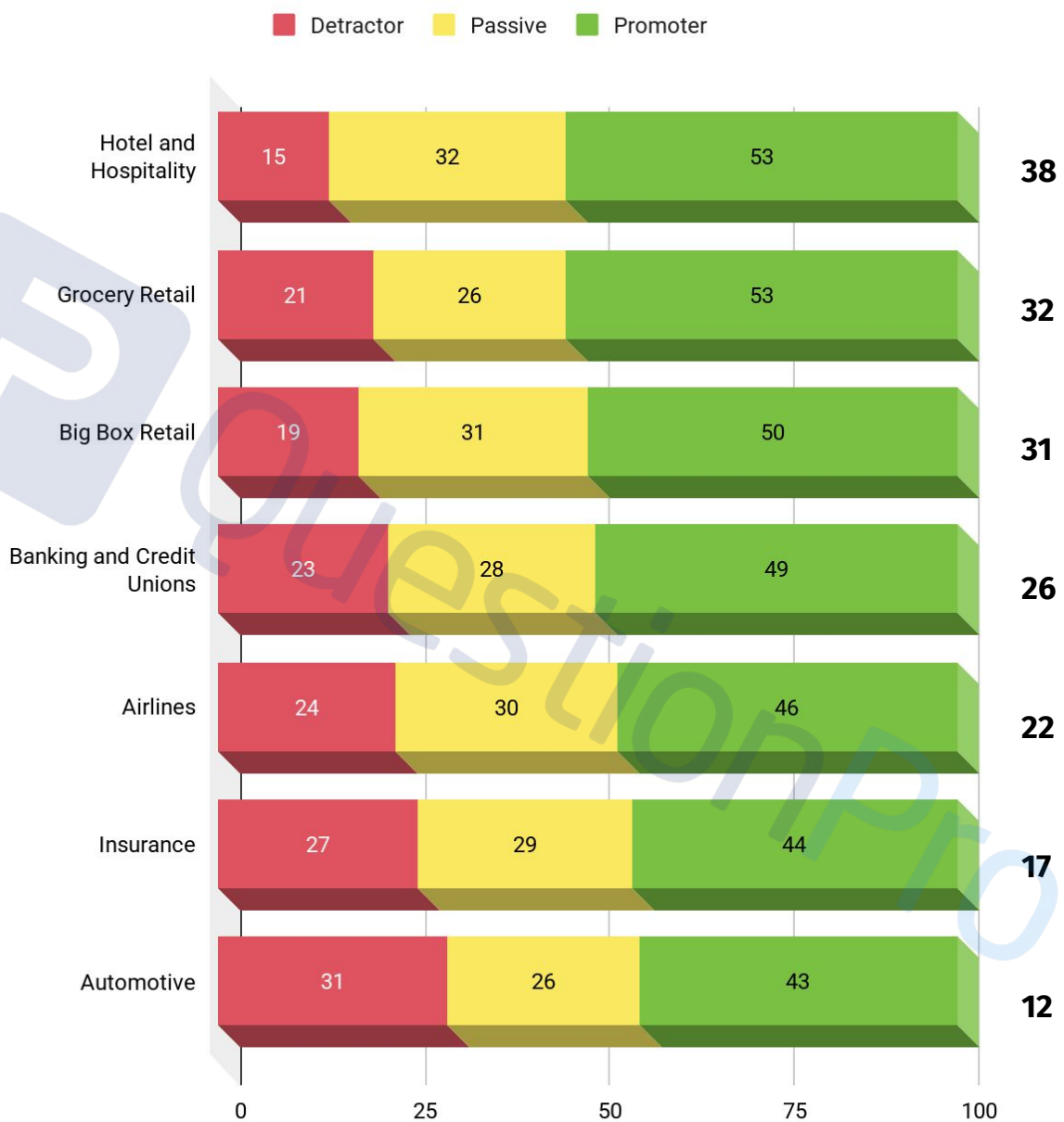
A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively an organization is achieving its key business objectives. In benchmarking, KPIs are used to compare an organization's performance against industry standards or best practices to identify areas for improvement.

- Net Promoter Score (NPS): Measures customer loyalty by gauging their likelihood to recommend a brand.
- Customer Satisfaction (CSAT): Evaluates overall customer satisfaction with products and services.
- Repurchase intent: Assesses whether customers are likely to continue buying from a brand.

Q4 2025

Net promoter score (NPS) by industry

Hotel and Hospitality (38), Grocery Retail (32), and Big Box Retail (31) top the NPS rankings, signaling strong customer loyalty, while Insurance (17) and Automotive (12) lag behind for the final quarter of the year.



Q4. Net promoter score (NPS) by industry

NPS Quarterly Comparison

2025 was defined by a dramatic "rise and fall" trajectory across all sectors. A steady first half gave way to a universal Q3 surge, where industries like Hospitality and Insurance hit record highs. However, this momentum proved fragile, crashing in a synchronized Q4 correction that erased all mid-year gains and dragged every major industry back to its lowest satisfaction levels of the year due to economic and operational pressures.

Industry	Q1	Q2	Q3	Q4
Hotel and Hospitality	44	38	56	38
Grocery Retail	37	34	49	32
Big Box Retail	37	32	42	31
Banking and Credit Unions	41	33	51	26
Airlines	33	37	50	22
Insurance	23	22	54	17
Automotive	41	30	44	12

Insights

In Q4, Hotel & Hospitality (38) and Grocery Retail (32) proved the most resilient, returning to their early-year baselines despite significant drops. This suggests consumers remained more forgiving of essential and experiential services. Big Box Retail also held steady above 30, cushioned by its bulk-value proposition.

Conversely, Automotive (12) and Insurance (17) suffered collapses, ending as the lowest-rated sectors. Insurance saw the most extreme volatility, plummeting from a Q3 high of 54. This massive correction likely indicates that high-ticket bore the brunt of end-of-year consumer frustration.

In Automotive, a drop from 44 to 12 in Q4 2025 is a clear red flag and reflects a broader industry correction. The decline was likely driven by the loss of EV purchase incentives, tariff-related price increases on vehicles and parts, and growing frustration with EV infrastructure and software reliability.

Overall, the synchronized Q4 crash confirms the "Q3 Boom" was a temporary anomaly. By year-end, economic fatigue caused a universal reset in customer tolerance, punishing every sector regardless of prior performance.

Question: "How likely are you to recommend X to your friends or colleague?"

Scale: From "0 = not at all likely" to "10 = extremely likely"

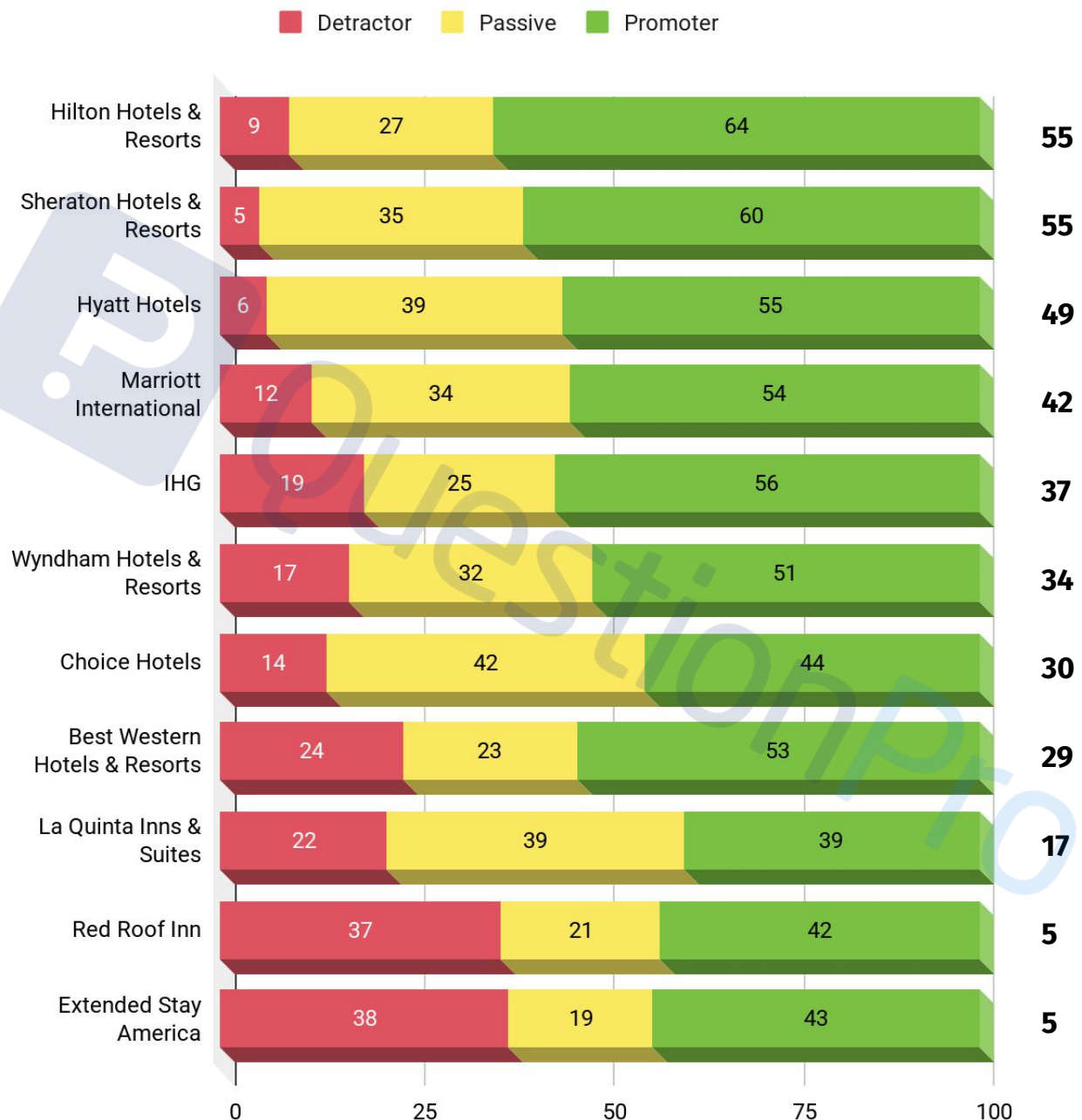
Promoters = 10 and 9, Passives = 8 and 7, Detractors = 6 to 0 | NPS = % share promoters - % share detractors



Q4 2025

Net promoter score (NPS) by brands in the **hotel and hospitality** industry

Hilton Hotels & Resorts and Sheraton Hotels & Resorts stand out as the industry leaders, tying for the top spot with an NPS of 55. At the other end of the scale, Red Roof Inn and Extended Stay America struggle to gain traction, both landing at the bottom with a score of 5.



Q4. Net promoter score (NPS) by brands in the **hotel and hospitality** industry

NPS Quarterly Comparison

In Q4, the hospitality sector experienced a notable "winter cooling" effect that chilled the red-hot sentiment seen in Q3. While Hilton Hotels & Resorts (55) remained the steady anchor of the industry, other premium brands felt the sting of the seasonal downturn more acutely.

Hotel and Hospitality	Q1	Q2	Q3	Q4
Hilton Hotels & Resorts	56	49	58	55
Hyatt Hotels	58	54	67	49
Marriott International	51	46	62	42
Wyndham Hotels & Resorts	48	55	52	34
Choice Hotels	38	37	48	30
Best Western Hotels & Resorts	42	30	45	29
La Quinta Inns & Suites	6	13	53	17

Insights

The Hyatt Hotels fell from a commanding Q3 high of 67 down to 49, and Marriott International dropped 20 points from 62 to 42, ending the year significantly lower than where it started in Q1. This suggests that while top-tier travelers remained loyal to Hilton's consistent service model, the broader premium market became highly sensitive to year-end pricing or availability constraints.

The mid-range and value segments displayed extreme volatility, with La Quinta Inns & Suites serving as the prime example of this instability. After a miraculous surge to 53 in Q3, the brand crashed back down to 17 in Q4, erasing nearly all its gains. Similarly, Wyndham Hotels & Resorts surrendered its mid-year progress, falling from 52 to 34, and Best Western dropped to a yearly low of 29.

These contrasts suggest that the massive NPS spikes seen in Q3 were largely driven by the "halo effect" of the summer travel boom rather than permanent operational improvements. Once the leisure season ended and business travel or holiday stress took over in Q4, guest patience wore thin. The data indicates that consistency was the ultimate differentiator in 2025; while brands like La Quinta could buy temporary love with summer pricing, only Hilton proved capable of maintaining high-level satisfaction when the easy seasonal wins evaporated.

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Scale: From "0 = not at all likely" to "10 = extremely likely"

Promoters = 10 and 9, Passives = 8 and 7, Detractors = 6 to 0 | NPS = % share promoters - % share detractors





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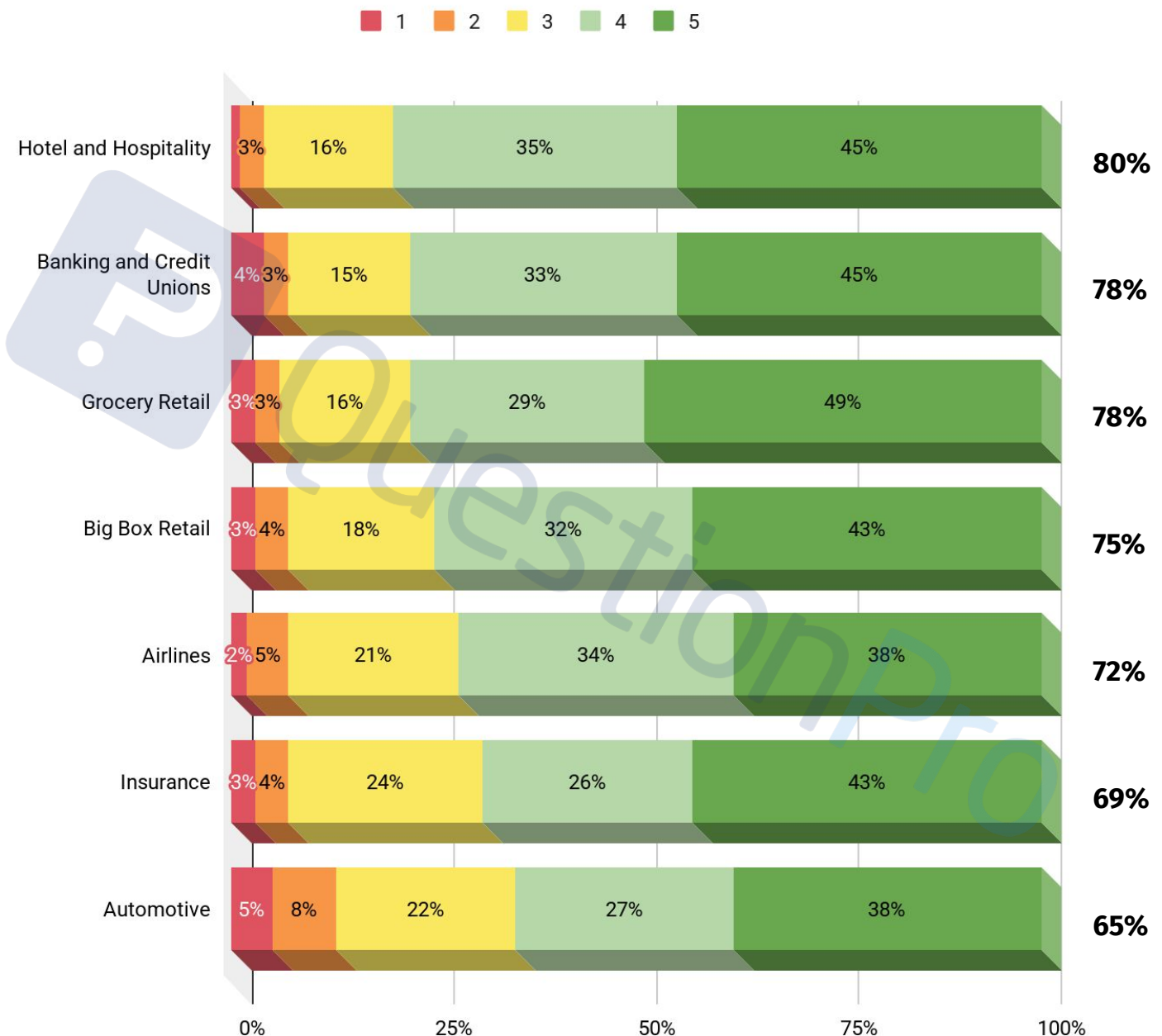


Customer satisfaction score (CSAT)

Q4 2025

Customer satisfaction score (CSAT) by industry

Hotel and Hospitality leads in customer satisfaction with a top-box score of 80%, closely followed by Banking and Grocery Retail at 78%. In contrast, the Automotive sector shows the lowest performance at 65%, indicating significantly weaker customer sentiment compared to the other industries.



Q4. Customer satisfaction score (CSAT) by industry

CSAT Quarterly Comparison

Customer satisfaction scores in 2025 followed a nearly universal "summer peak, winter crash" pattern. While Q3 served as a high-water mark for customer satisfaction across all sectors—likely driven by summer optimism and seasonal promotions—Q4 brought a sharp reality check, with every major industry posting declines as operational pressures and end-of-year financial fatigue probably weighed heavily on consumer sentiment.

Industry	Q1	Q2	Q3	Q4
Banking and Credit Unions	82	78	87	80
Hotel and Hospitality	79	74	85	78
Grocery Retail	78	79	84	78
Big Box Retail	76	77	83	75
Insurance	77	79	85	72
Airlines	70	65	82	69
Automotive	76	67	84	65

Insights

In Q4, the Automotive sector experienced the most severe volatility, plummeting to 65 (down from a Q3 peak of 84). This massive 19-point drop suggests that the "tariff bump" enthusiasm likely evaporated, leaving buyers to face high interest rates and dealer markups that probably soured the purchase experience. Similarly, Airlines (69 down from 82) and Insurance (72 down from 85) saw double-digit corrections, implying that operational strains during holiday travel and end-of-year premium adjustments likely eroded the goodwill built up during the summer.

Conversely, Banking and Credit Unions (80) and Grocery Retail (78) demonstrated the most resilience, declining less severely than discretionary categories. This relative stability suggests that essential service providers likely maintained better operational consistency than retail or hospitality sectors, which probably struggled with seasonal staffing shortages.

The data indicates a clear seasonal psychology where customers rewarded industries that could maintain "business as usual" during the chaotic Q4 window, while heavily penalizing those that allowed service levels to slip.

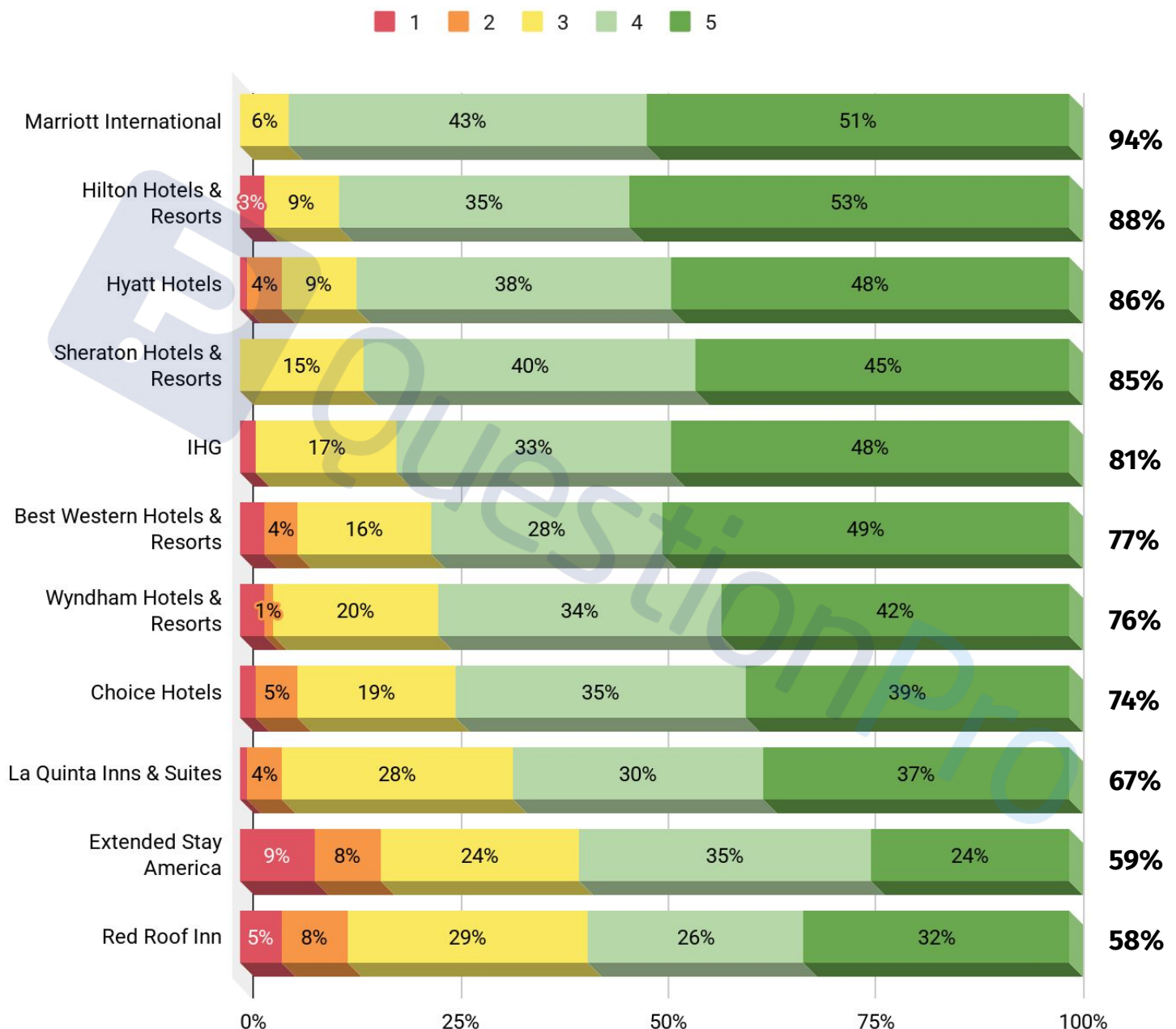
Question: "How satisfied are you with X?"
 Scale: From "1 = very dissatisfied" to "5 = very satisfied"
 CSAT Score = (% of responses rated 4 or 5) × 100



Q4 2025

Customer satisfaction score (CSAT) by brands in the **hotel and hospitality** industry

Marriott International sets the industry standard with an exceptional 94% customer satisfaction rating, leading other premium brands like Hilton (88%) and Hyatt (86%). In contrast, economy lodging options trail significantly, with Extended Stay America (59%) and Red Roof Inn (58%) receiving the lowest scores in the group.



Q4. Customer satisfaction score (CSAT) by brands in the hotel and hospitality industry

CSAT Quarterly Comparison

The hotel and hospitality industry displayed a divergence in late 2025, where premium brands achieved record highs while midscale and economy operators faced severe corrections. While the sector enjoyed a "summer peak" in Q3 with elevated satisfaction driven by leisure travel, Q4 brought a sharp reversal for value-focused brands, likely due to "price normalization" and staffing pressures that eroded the guest experience at lower price points.

Hotel and Hospitality	Q1	Q2	Q3	Q4
Marriott International	88	83	89	94
Hilton Hotels & Resorts	86	82	89	88
Hyatt Hotels	93	80	91	86
Best Western Hotels & Resorts	79	75	83	77
Wyndham Hotels & Resorts	82	80	85	76
Choice Hotels	74	76	81	74
La Quinta Inns & Suites	65	68	89	67

Insights

In Q4, the most dramatic volatility was seen in the midscale and economy segments, where La Quinta Inns & Suites plummeted to 67 (down from a surprising Q3 peak of 89) and Wyndham Hotels & Resorts dropped to 76 (from 85). This massive 22-point correction for La Quinta suggests that its Q3 surge was likely an anomaly driven by summer leisure volume, which probably evaporated in Q4 as price-sensitive travelers became less forgiving of service lapses during the off-peak season. Similarly, Choice Hotels (74) and Best Western (77) posted declines, indicating that the "value-for-money" proposition likely faltered as rising operational costs constrained their ability to maintain service standards.

The top-rated brands—Marriott International (94) and Hilton Hotels & Resorts (88)—defied the broader industry downturn. Marriott's surge to a near-perfect 94 (up from 89) suggests its investment in digital concierge services and loyalty personalization probably insulated it from the labor shortages plaguing competitors. Hilton remained remarkably consistent, holding steady near 88, which implies its "tech-forward" strategy (e.g., digital keys, smart rooms) likely continued to deliver the friction-free experiences that high-yield business travelers prioritize.

Question: "How satisfied are you with X?"
 Scale: From "1 = very dissatisfied" to "5 = very satisfied"
 CSAT Score = (% of responses rated 4 or 5) × 100

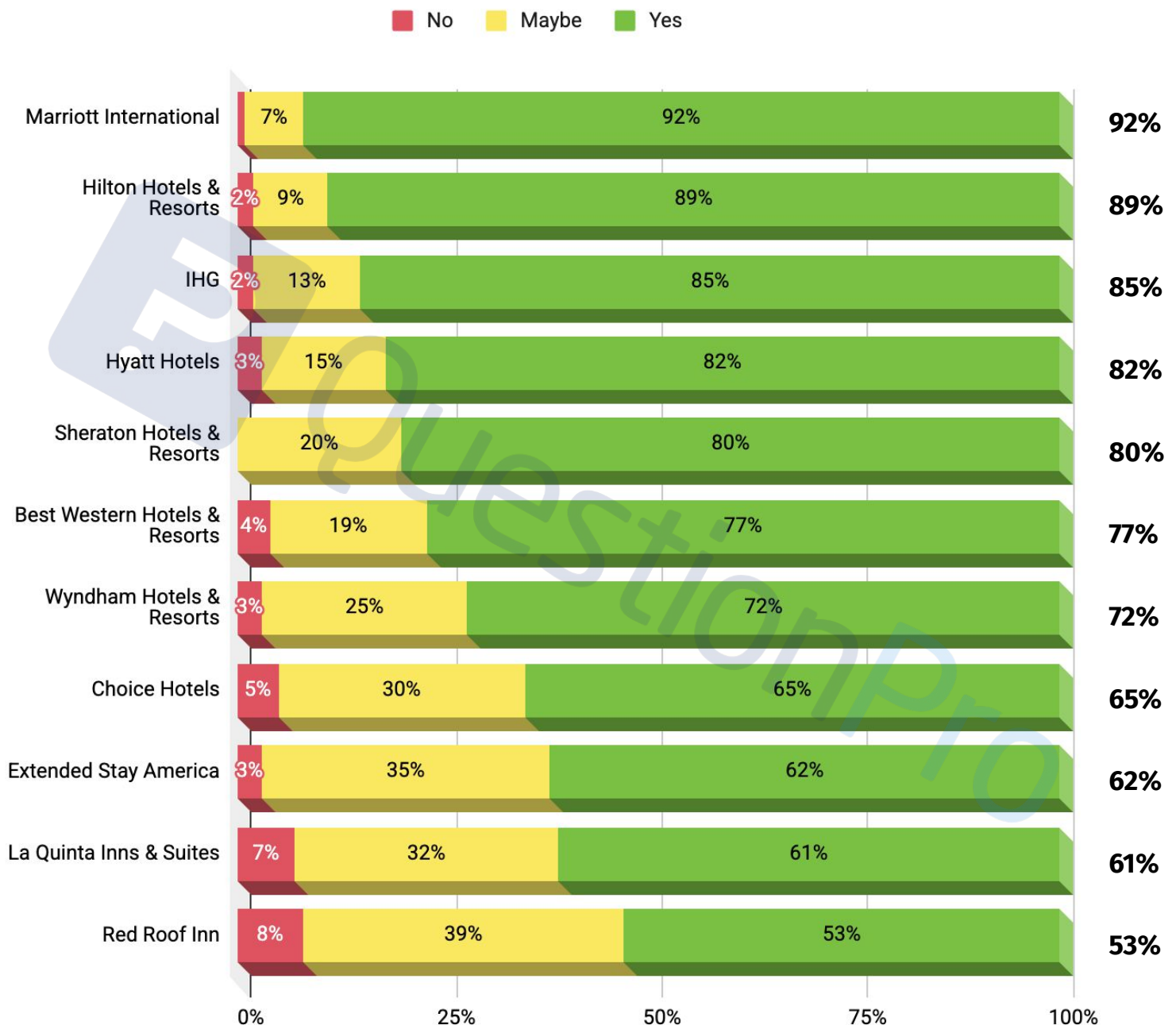


Future purchase intent

Q4 2025

Future purchase intent by brands in the **hotel and hospitality** industry

Marriott International and Hilton Hotels & Resorts dominate the hospitality sector with the highest future purchase consideration rates of 92% and 89%, respectively. While most major chains maintain strong interest, budget-focused brands like Red Roof Inn and La Quinta Inns & Suites see lower definitive intent (53% and 61%).



Q4. Future purchase intent by brands in the hotel and hospitality industry

Purchase Intent Quarterly Comparison

In Q4, the hospitality sector saw a distinct divergence in Purchase Intent; Best Western posted the most significant rebound (77 from 67), while La Quinta Inns & Suites (61 from 78) and Choice Hotels (65 from 74) experienced sharp declines. Market leaders Marriott International (92 from 92) and Hilton Hotels & Resorts (89 from 90) maintained their dominance with little to no fluctuation.

Hotel and Hospitality	Q1	Q2	Q3	Q4
Marriott International	83	85	92	92
Hilton Hotels & Resorts	85	83	90	89
Hyatt Hotels	82	78	88	82
Best Western Hotels & Resorts	82	66	67	77
Wyndham Hotels & Resorts	82	79	75	72
Choice Hotels	76	67	74	65
La Quinta Inns & Suites	54	63	78	61

Insights

In Q4 the top-rated brands, Marriott and Hilton, benefited from the resilience of the luxury and full-service segments, which outperformed the broader market as higher-income travelers and group business demand remained steady despite economic uncertainty. Marriott's ability to hold its peak 92% intent score aligns with its "record development pipeline" and strong international performance, effectively insulating it from the domestic softness seen in lower chain scales.

The brands with the largest volatility, La Quinta (61) and Choice Hotels (65), were hit hardest by a pullback in the budget and select-service sectors. La Quinta's dramatic 17-point drop corresponds with reports of "softness" in key leisure markets, as inflation-weary consumers reduced discretionary travel during the non-holiday windows of Q4. Best Western, conversely, defied this trend by securing a 10-point rebound, likely buoyed by its recognition as a top global brand for "trust and consistency," which resonated with pragmatic travelers seeking reliable value over risky low-cost alternatives.

While budget-conscious travelers retreated from the market, reducing intent for economy brands, those who continued to travel consolidated their loyalty around established, premium chains and trusted value operators.

The Future Purchase Intent follow-up metric captures post-purchase loyalty by asking recent buyers, "How likely are you to purchase again from [Brand]?" Responses are reported as:
 % Likely to Repurchase (Yes): Strong future intent
 % At Risk (No): Potential churn signal
 % Undecided (Maybe): Opportunity for brand reinforcement



Study profile

Study profile

Objective of the study

Benchmarking data for NPS, CSAT, and future purchase intent across seven industries and their top brands.

Survey method

Structured online interviews in the QuestionPro Audience platform.

Target group

Participants aged 18 and over who live in the United States and are involved in purchasing decisions for products and services on their own or with others.

Sample

1,001 participants

Survey period

November 2025

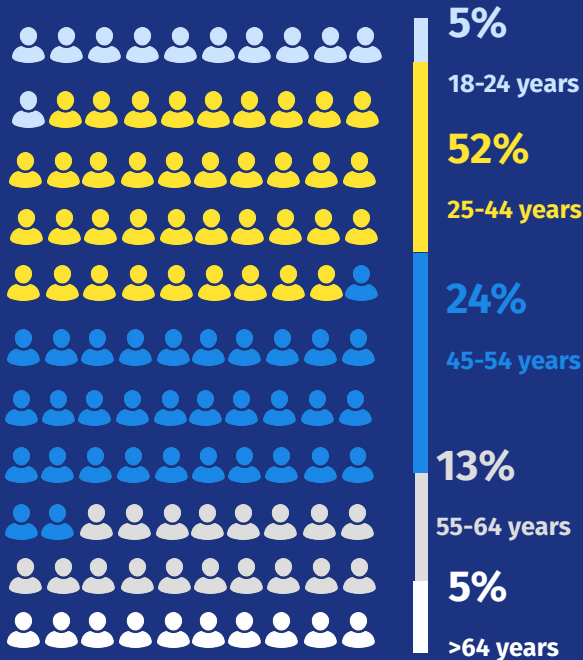
Gender



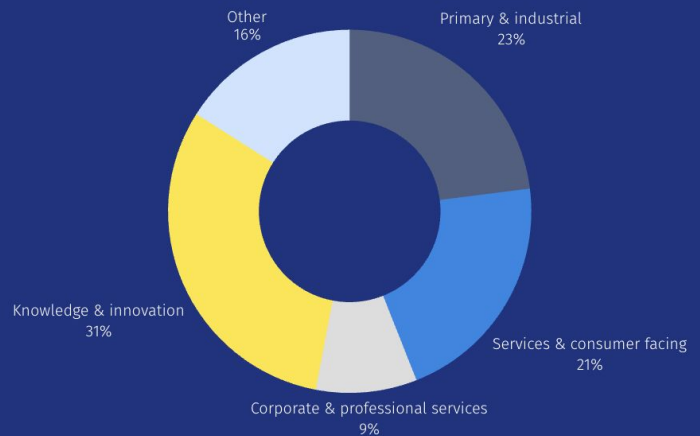
Job status



Age



Working industry by type and function



About QuestionPro

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President, Customer Experience

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