

Market Authority Index

Hospitality, Experience and Tourism

Sector Executive Summary

Q2 2026 | 14 brands in this sector out of a total of 164 Assessed brands.

Average Market Authority Index: 69.2/100

Median: 71 | Certification rate: 64.3%

(achieve a score of 65 or above)

21 July 2026

Sector Executive Summary

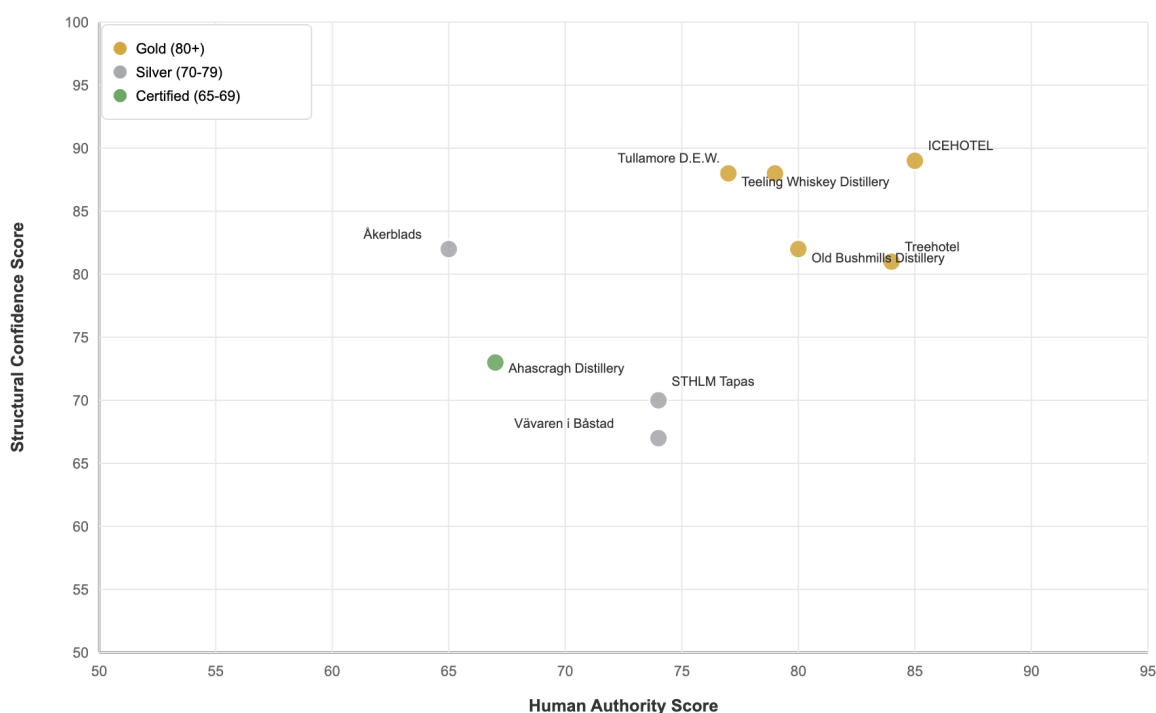
Prepared by Digital Scorecard

Sector Overview

Hospitality, Experience and Tourism is one of the most distinctive sectors in the Q2 2026 Market Authority Index benchmark, scoring 69.2 on average against a cross-sector portfolio average of 67.1. The sector's median score of 71 places the typical hospitality brand in the Strong band. With a certification rate of 64.3%, nearly two-thirds of assessed brands meet or exceed the certification threshold of 65.

Hospitality, Experience and Tourism — Authority vs Structure

9 certified brands mapped by Human Authority and Structural Confidence scores



What makes this sector stand out is its concentration of top performers. Five of the 14 assessed brands achieve Gold certification (80+), the highest Gold count of any sector in the benchmark. These five brands, ICEHOTEL (86), Treehotel (83), Tullamore D.E.W. (82), Old Bushmills Distillery (81), and Teeling Whiskey Distillery (80) all share a common trait: they are experience-led businesses that have built strong buyer-facing credibility alongside sound structural foundations. The fact the sector has so many is self fulfilling as we selected many known brands and their competitors. We expect the pattern to change in time. It is also worth noting that while several of these brands are known for their product such as distilleries, they are assessed here based on their visitor center which is a strong line of business for the leaders.

The sector also has the widest Structural Confidence variance of any sector assessed (Standard Deviation of 15.3), ranging from Mackmyra Whisky at 30 (triggering the SC Cap) to

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ICEHOTEL at 89. This variance means the gap between the best-run and weakest-structured hospitality businesses is more pronounced than in any other sector. Financing these types of businesses is not easy and they have cycles that are unique to hospitality businesses.

Where Hospitality Brands Are Strong

Strategic Positioning is the sector's strongest pillar at 19.5 out of 25, above the portfolio average of 18.7. This reflects the sector's natural strength: hospitality brands tend to have clear, compelling propositions that communicate what makes them distinctive. Experience-led brands are inherently good at articulating why a buyer should choose them.

The most notable finding is Proof and Validation, which averages 15.8 out of 25, significantly above the portfolio average of 11.8. This makes Hospitality the only sector where Proof and Validation exceeds the cross-sector benchmark by a meaningful margin. The explanation is straightforward: hospitality businesses live and die by reviews, ratings, and visible customer evidence. Guest reviews, media coverage, awards, and social proof are built into the business model in a way that most other businesses and especially B2B or product-led sectors do not match. But there is a lot of variation (SD 5.1) so it is not a uniform implementation.

Pillar	Sector Avg (/25)	SD	Portfolio Avg (/25)
Strategic Positioning	19.5	3.0	18.7
Proof & Validation	15.8	5.1	11.8
Trust Infrastructure	16.6	3.6	16.7
Market Presence	15.4	4.0	14.9

Based on 13 of 14 hospitality, Experience and Tourism brands.

Sector Leaders

Five brands achieve Gold certification, the highest Gold count of any sector:

Brand	Market Authority Index	Tier	Subsector
ICEHOTEL	86	Gold	Unique Experience Stay
Treehotel	83	Gold	Unique Experience Stay
Tullamore D.E.W.	82	Gold	Distillery & Visitor Center
Old Bushmills Distillery	81	Gold	Distillery & Visitor Center
Teeling Whiskey Distillery	80	Gold	Distillery & Visitor Center
STHLM Tapas	73	Silver	Restaurant & Dining
Vävaren i Båstad	72	Silver	Visitor Attraction & Heritage
Åkerblads	70	Silver	Hotel & Accommodation
Ahascragh Distillery	69	Certified	Distillery & Visitor Center

The two highest-scoring brands, ICEHOTEL and Treehotel, are both unique experience stays. These are businesses where the experience itself is the product, and where every touchpoint is designed to create a lasting impression. Their Human Authority scores (85 and 84 respectively) are among the highest in the entire benchmark. And of note these are not the largest businesses assessed so smaller businesses can and do achieve market authority if they want and in some cases it is not a choice but a need in order to make the business work.

The distillery and visitor centre subsector is well represented with four Gold or Silver brands, demonstrating that heritage-led hospitality businesses can build exceptional market authority when they combine their brand story with structured proof and sound governance. But we do find a lot of variation in this subsector where great products have not been turned into great market authority, a gap that literally is costing these businesses on a daily basis.

Where the Gap Remains

Trust Infrastructure scores 16.6 out of 25, marginally below the portfolio average of 16.7. While not a dramatic gap, it is the only pillar where the sector falls below the cross-sector benchmark. This reflects a common pattern in hospitality: smaller operators may lack the structured digital trust signals clear policies, transparent terms, security credentials, and structured data — that buyers and AI systems look for when evaluating a brand.

The Proof and Validation leaders in this sector are:

Brand	Proof and Validation (/25)	Market Authority Index
ICEHOTEL	22	86
Teeling Whiskey Distillery	21	80
Treehotel	20	83
Old Bushmills Distillery	20	81
STHLM Tapas	20	73

All five PV leaders score 20 or above, and all are certified. This is a tight cluster of brands that have systematically invested in making their customer evidence visible, verifiable, and structured. They made a choice.

The brands at the bottom of the sector tell a different story. They show that even within a sector known for customer reviews, some brands have significant gaps in structured proof infrastructure.

Score Distribution for Hospitality, Experience & Tourism

Band	Score Range	Brands
Exceptional	80-100	5
Strong	70-79	3
Developing	60-69	3
Emerging	40-59	2
At Risk	Below 40	1

One brand triggered the Structural Confidence cap, meaning its Market Authority Index is capped at 65 regardless of its Human Authority score. This is the only sector where the SC Cap has been applied. It means that a business that does not appear to be structurally stable cannot achieve a high or certified market authority regardless of their other actions.

What This Means for Hospitality Brands

The sector's natural strength in Proof and Validation is a genuine competitive advantage. Hospitality brands are, on average, better at demonstrating evidence of customer satisfaction and third-party validation than any other sector in the benchmark. This positions them well as buyer discovery shifts toward AI-driven recommendation and comparison.

The opportunity lies in consistency. The sector's high variance (SD 12.6 for MAI, 15.3 for SC) means the gap between the best and weakest brands is wider than in most sectors. The Gold-certified brands show what is achievable; the question for every other hospitality brand is whether their digital presence and structural foundations match their on-the-ground experience quality.

The experience-led brands that score highest are those that have translated the quality of their physical experience into a digital presence that is equally compelling, structured, and verifiable. A hotel or distillery that delivers an exceptional in-person experience but has a weak digital footprint, inconsistent reviews, or thin trust infrastructure will be increasingly overlooked as buyers discover and evaluate options through AI-mediated channels.

It is also clear from the data that brand size does not determine market authority. STHLM Tapas, a single-venue restaurant brand, scores 73, the same tier as many multi-site operators. The lesson is that clarity of positioning and visible proof matter more than scale but the will and determination to act and show this is also evident.

What Should Hospitality Brands Do Next?

The data points to three practical priorities for hospitality brands looking to strengthen their Market Authority:

1. Protect the Proof and Validation advantage. This sector leads the benchmark on Proof and Validation, but the advantage is not uniform. Five brands score 20+ while others score as low as 4. The brands at the top have invested in structured review management, visible case studies, media coverage, awards, and third-party endorsements. The practical action: audit your proof infrastructure, is your customer evidence current, structured, and findable by AI systems, not just by human visitors?

2. Close the Trust Infrastructure gap. At 16.6/25, this is the one pillar where the sector falls below the portfolio average. Concrete actions: ensure privacy policies, terms of service, and security credentials are clear and current; implement structured data (**schema markup**) so search engines and AI systems can read your trust signals; and make booking, cancellation, and refund policies transparent and easily accessible. Some platforms in this sector can cause issues if they do not allow flexibility and personalised script and schema to be added.

3. Address structural foundations before they become a ceiling. The Structural Confidence variance in this sector (Standard Deviation 15.3) is the highest of any sector. Brands with weak governance, lapsed filings, or thin financial transparency pay a real penalty — and the Structural Confidence (SC) Cap means any brand with an SC score below 40 can never achieve certification. Structural health is not glamorous, but it is a prerequisite.

Assessed vs. Full Dataset Comparison

The table shows how the sector compares to all businesses in the directory to date. Hospitality brands perform in line with the full dataset on most measures. The sector's average of 69.2 sits 2.1 points above the cross-sector average of 67.1, and the median of 71 exceeds the full dataset median of 70 by one point. The certification rate of 64.3% is exactly equal to the dataset-wide rate.

Where the sector distinguishes itself is at the top: five Gold-certified brands (35.7% of the sample) is a higher Gold concentration than any other sector. The sector's strength is concentrated in its leaders rather than being evenly distributed.

The higher standard deviation (12.6 vs 12.8) and wider SC variance (15.3 vs cross-sector norms) confirm that this is a sector of extremes — the best hospitality brands are among the strongest in the entire benchmark, while the weakest are genuinely at risk.

Metric	Hospitality Assessed (n=14)	Full Dataset (n=694)
Mean Market Authority Index	69.2	67.1
Standard Deviation	12.6	12.8
Median	71	70
Certification Rate (65+)	64.3%	64.3%

About the Market Authority Index

What It Measures

The Market Authority Index is a composite score (0-100) that measures how discoverable, credible, and recommendable a brand is from the buyer's perspective. It combines two dimensions:

- **Human Authority (70% weight):** The strength of a brand's buyer-facing credibility, measured across four pillars; Strategic Positioning, Proof and Validation, Trust Infrastructure, and Market Presence. Each pillar is scored out of 25, for a maximum of 100. It is a measure of Market Visibility.
- **Structural Confidence (30% weight):** The soundness of a brand's corporate and operational foundations, including filing compliance, financial risk signals, governance stability, and operational longevity. It is a measure of business strength and durability.

Formula

Market Authority Index = (Human Authority x 0.70) + (Structural Confidence x 0.30)

Structural Confidence Cap: If a brand's Structural Confidence score is below 40/100 and regardless of its Human Authority score, the Market Authority Index is capped at 65 regardless of the formula result. This prevents structurally unsound but authority-rich brands from achieving misleadingly high composite scores.

Certification Tiers

Tier	Score Threshold
Gold	80 or above
Silver	70-79
Certified	65-69

Brands scoring below 65 are not certified but receive a full diagnostic assessment.

Assessment Methodology

All brands in this sector summary have been assessed using the full Market Authority Index methodology as defined in the Market Authority Standard (Version 1.1), details [here](#). This

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includes a complete Human Authority audit across all four sub-pillars, Structural Confidence verification using public filings and financial data, and scoring against the standardised framework.

The Market Authority Index is based entirely on publicly observable, buyer-facing information. It does not use self-reported data, and assessment is conducted independently of the brands being scored.

The Benchmark Dataset

This sector summary draws from the Q2 2026 benchmark portfolio of 164 fully assessed brands across 25 sectors. The full Market Authority Index dataset includes 694 brands scored across three tiers:

Tier	Brands	Average Score	Method
Assessed	164	64.1	Full audit methodology
Estimated	340	69.1	Structured signal analysis
Expected	190	65.0	Observable market signals

For the full cross-sector analysis, methodology details, and complete benchmark data, refer to the Market Authority Index Benchmark Intelligence Report 2026, Q2 Edition [here](#).

Explore all assessed Hospitality, Experience and Tourism brands in the Market Authority Index Certified Directory: <https://digitalscorecard.com/sector/hospitality-experience-tourism/>

This report has been produced by Digital Scorecard. The Market Authority Index is based on the Market Authority Standard.

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