



VisitEngland™

# Common Standards Review – Consumer Research

## Summary of Findings

### Topline Findings

- Star ratings are widely used, but are not among the most important decision criteria in choosing accommodation. They help consumers to filter/refine their search process, but as ever more information is available via the Internet, it will become increasingly important to better communicate the meaning of these ratings so that they can be used in a more informed way.
- Online user reviews are widely used, and valued for their immediacy, but consumers can be sceptical, and certainly don't believe everything they read.
- There is some confusion about who exactly awards the star ratings, but nonetheless these are more trusted than other award/review options. Trust increases once it is known that the tourist boards / AA are the awarding bodies, again highlighting the importance of communications.
- Within their limited awareness of what the scheme involves, consumers are largely satisfied with it – the frequency of assessment is felt to be about right, and star-rated establishments almost always meet expectations.
- While the idea of designators is positively received as an aid to the accommodation search, the number of designators is felt to be excessive, and not all are understood.
- Accessibility / sustainability criteria are viewed as important, but there are some doubts as to whether they belong within an accommodation quality assessment scheme.

### Objectives

Research was carried out to explore consumer attitudes towards star ratings, in order to:

- Identify the role ratings play in the accommodation decision-making process
- Measure understanding and approval of the scheme – the inspection process, expectations at different star levels, trust in awarding bodies, comprehension of designators
- Understand how the Quality Standards scheme can / should sit alongside other sources of information – in particularly user-generated reviews and ratings

### Methodology

The research was carried out in two phases. In September 2009, 10 group discussions were held across five cities (London, Edinburgh, Birmingham, Manchester and Belfast), with this initial phase designed to provide an in-depth exploration of consumer views, and so generate hypotheses which could then be tested in the second, quantitative phase. The quantitative research was carried out in November 2009, using an online methodology to interview 819 respondents who had stayed in serviced accommodation in the UK during the past 12 months (601 consumers resident in the UK, 108 in Germany and 110 in France).

The research was commissioned jointly by the four national tourist boards and the AA, and was carried out by the independent market research agency TNS, who were awarded the contract for this project following a tender process

### Summary of Findings

#### Accommodation Decision-Making

For leisure users, en suite facilities, price and location are the three most important factors in accommodation choice, while for business travellers, price is less important, but wi-fi and parking options matter more. Although star ratings are relatively less important than many of these fundamental accommodation characteristics, they still play a core role – 1 in 3 visitors always use them, and fewer than 1 in 10 claim to never use them.

Among those who use the internet to research accommodation, 63% agreed that they always refer to user reviews. Whilst people are aware that a degree of caution is needed and that not all comments can be believed, these reviews are particularly valued for their ability to provide a very up-to-date view.



## Trust in Awarding Bodies

The qualitative research highlighted a lack of awareness about exactly who ran the star rating schemes, and this was confirmed in the quantitative phase. When asked to choose from a list of possible award bodies, 1 in 3 respondents didn't know at all, though 56% mentioned at least one of the tourist boards, and 36% the AA (with 1 in 4 still mentioning the RAC)

The official rating scheme has a higher level of trust than other assessment options (trip advisor ratings and reviews, hotel's own ratings or other star ratings), and once the association with the tourist boards / the AA was mentioned, 26% said that this increased their level of trust.

## Current Grading Requirements

Almost three quarters agreed that when staying at a three star hotel/guest house, all the facilities should be of a three star standard – and the majority also agreed that it was logical for hotels to be graded on different criteria than B&B's / guest houses.

The qualitative research indicated that many people were unsure what the difference was between the different star levels. In particular, many rejected the idea of staying in a one or two star property – this seemed to them almost worse than no rating at all – though they often changed their minds about this once introduced to the explanation of the ratings, again emphasising that consumers need to know more about the scheme to fully maximise its value to them.

## Expectations and Priorities

20% - 30% were unsure of the star rating of the accommodation on their last trip (higher for B&B's than hotels), but where the star rating was known, over three quarters said that their expectations were either met or exceeded (and a further 11% claimed to have no expectations!)

Cleanliness was viewed as being by far the most important factor to include in the assessment (71% describing this as "extremely important") followed by value/price, a high level of service and the range of facilities offered. Décor style and individuality / uniqueness were seen as far less important for the assessment (though for some these may play an important role in hotel choice, with "boutique" hotels often cited as a search criteria in the qualitative research), and there was little call for the accommodation's website to contribute to its rating

## Designators

The qualitative research indicated that while designators could in principle be helpful in filtering an accommodation search, the sheer number of them, together with a lack of clarity about definitions, made it difficult to meaningfully differentiate between them.

This was confirmed in the quantitative research, where 8 out of 10 agreed that standard designators were helpful, but over 6 out of 10 thought the number of categories confusing. Only the terms "Hotel" and "Bed & Breakfast" were understood completely by the majority, with "Restaurant with Rooms," "Inn," "Guest Accommodation" and "Metro Hotel" the least well-understood designators.

## Quality Ratings and Inspections

The majority thought the current annual inspection frequency was about right, though a significant minority (1 in 4, more so among business travellers) thought this was not frequent enough.

## Sustainability and Accessibility

There was support for the idea that these aspects should be taken into account by accommodation establishments (and in the case of accessibility, an assumption that this in any case formed a legal requirement). However, the qualitative research highlighted that there were doubts about whether these should form part of a formal quality assessment scheme, and rather were viewed as something to be assessed / communicated separately

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