

Quality Standards

Serviced Accommodation Consumer Research (200936)

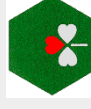
Presentation of Quantitative Results (16th December 2009)

Presented to: VisitEngland, VisitScotland, VisitWales, Northern Ireland
Tourist Board and the AA

Presented by: TNS-RI Travel & Tourism



research international



Northern Ireland
Tourist Board



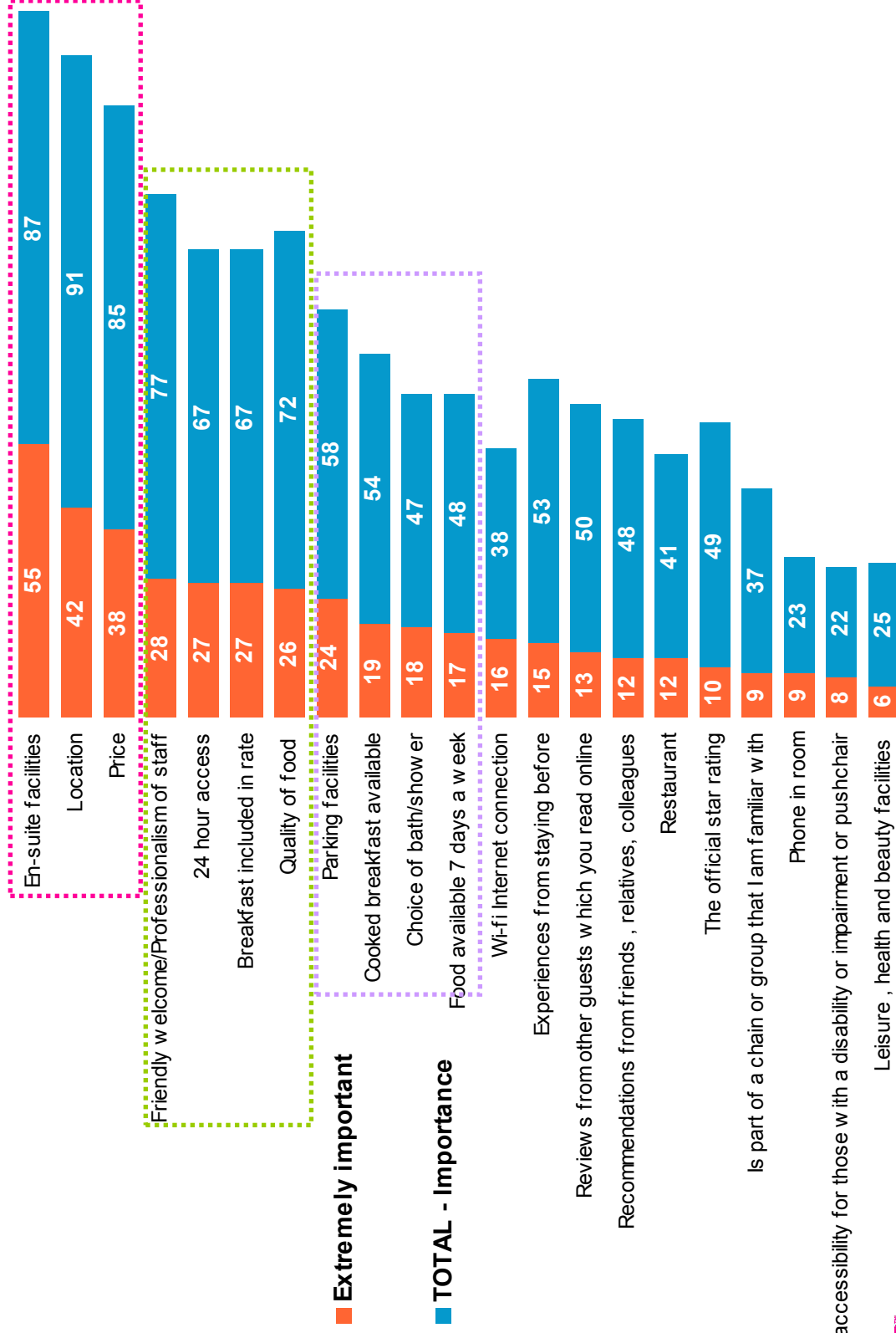
Sample Details (1)

- Online survey using our in-house Kantar panel
- 819 completed interviews
 - 601 with UK respondents, 108 in Germany and 110 in France
- A mix of countries visited
 - Trip destination – England - 698 respondents (85%), Scotland- 268 (33%), Wales - 122 (15%) and Northern Ireland - 73 (9%)
- Survey respondents had to have stayed within serviced accommodation during a holiday or short break in the UK in the last 12 months
- A mix of those on business and leisure trips
 - Leisure – 548 respondents (67%), Business – 271 (33%)

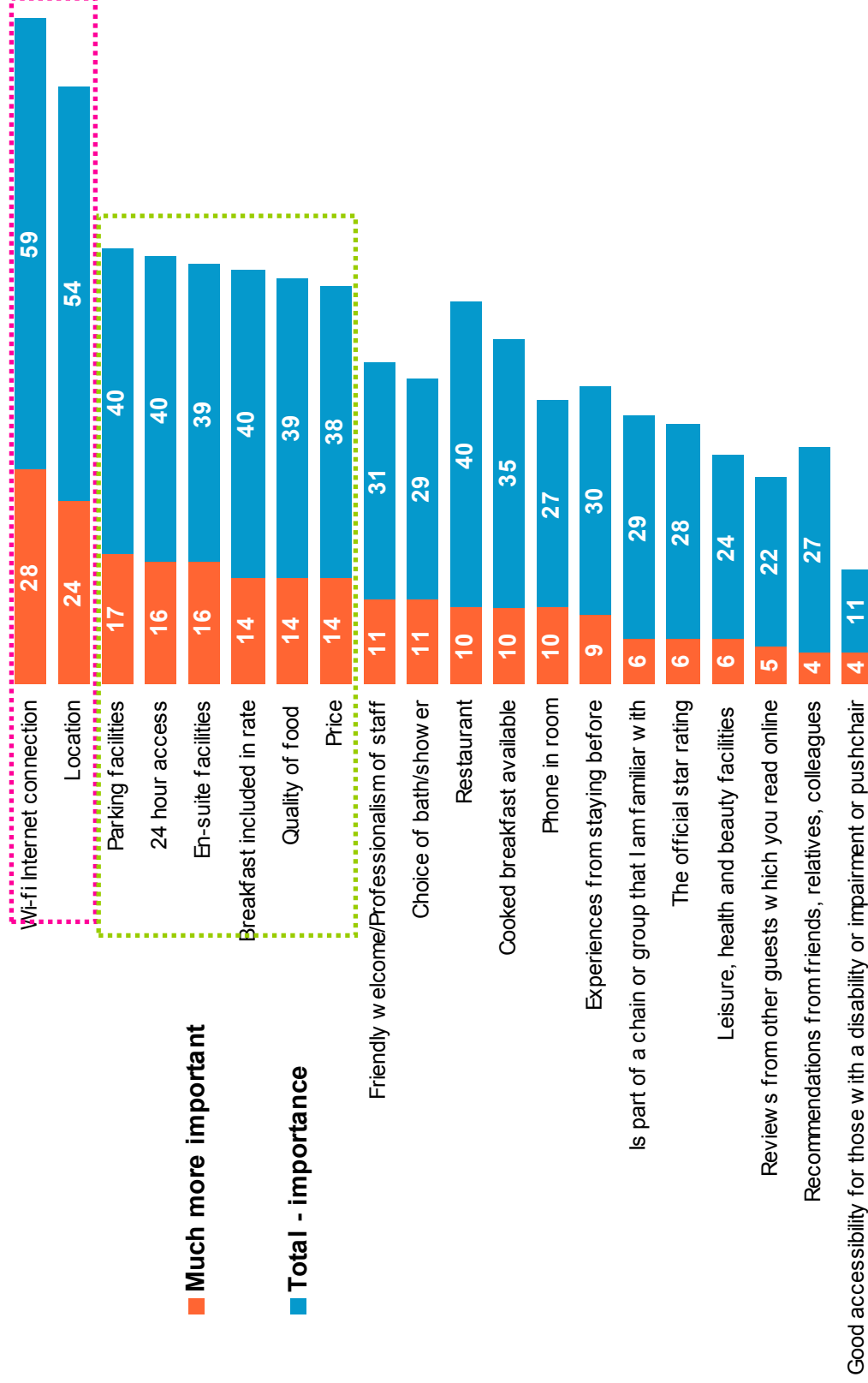
Setting the context – where did they stay?

- Overall, the majority stayed in a hotel during most recent overnight trip – 81%
- One in five stayed in bed and breakfast accommodation (19%)
 - German respondents more likely to have stayed in a bed and breakfast establishment – 41%
- Overall, 13% stayed in a guest house
- Those on a business trip – majority stayed in a hotel (94%) with smaller proportions staying in B&B (13%) and Guest House (10%)
- Consistency in accommodation types used across destinations visited

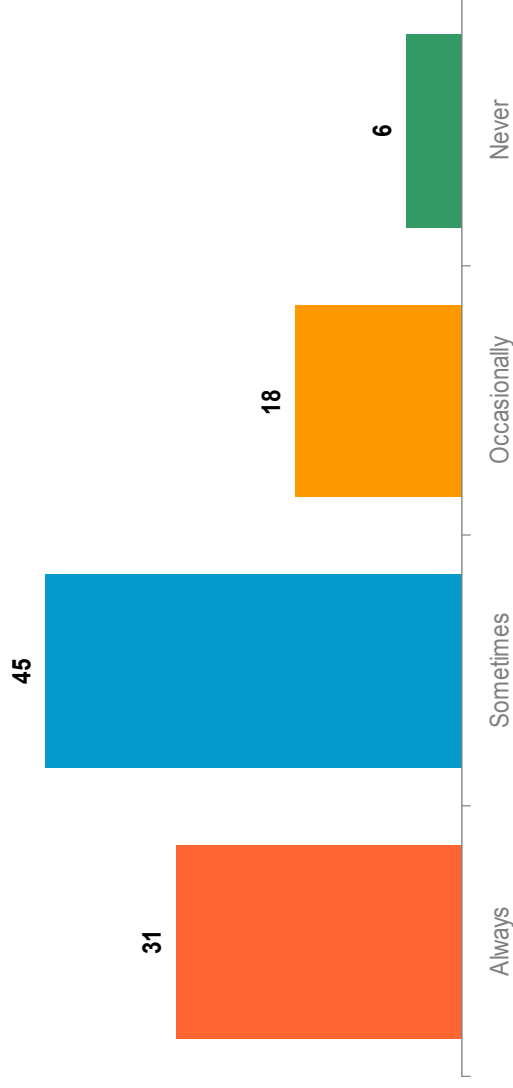
Importance of factors in choosing accommodation - Leisure trips (%)



Factors which are more important on business trips when choosing accommodation (%)



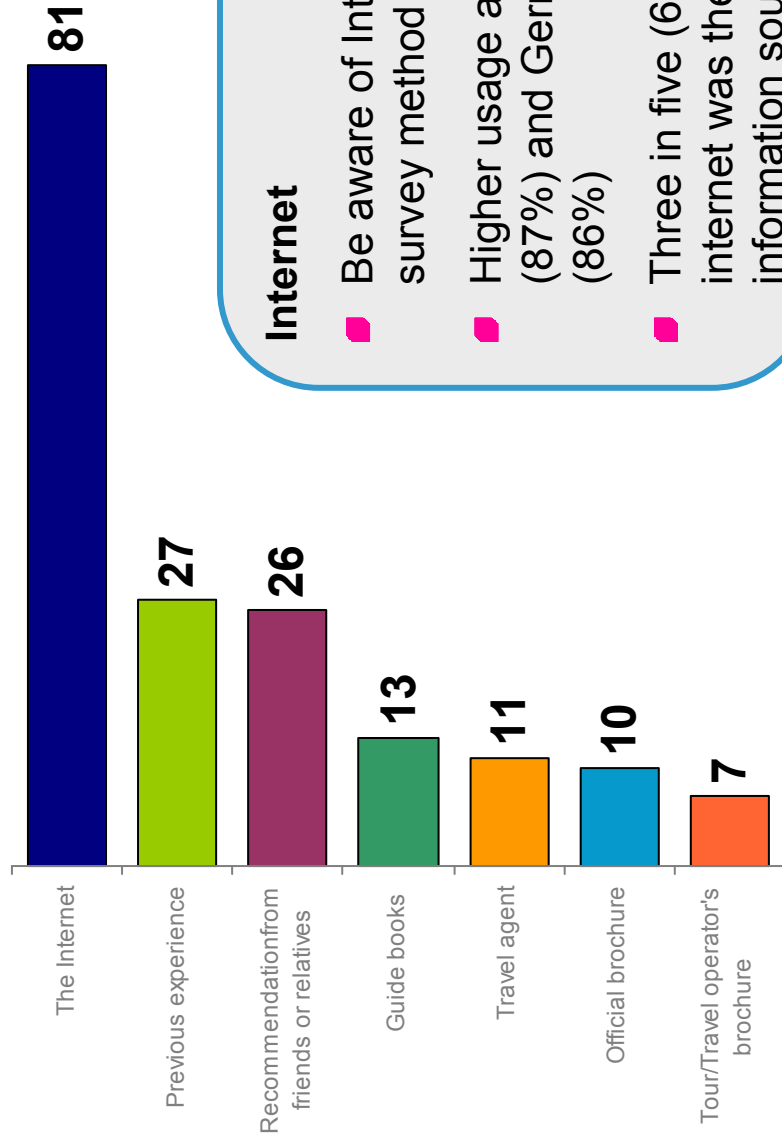
What role do star ratings play in choosing accommodation in the UK – frequency of use (%)



Those more likely to 'always' use star ratings

- German and French visitors (39%)
- Those on a trip to Wales (37%)
- Families (40%)
- Those who use user reviews (39%)

Information sources used in choosing accommodation (%)

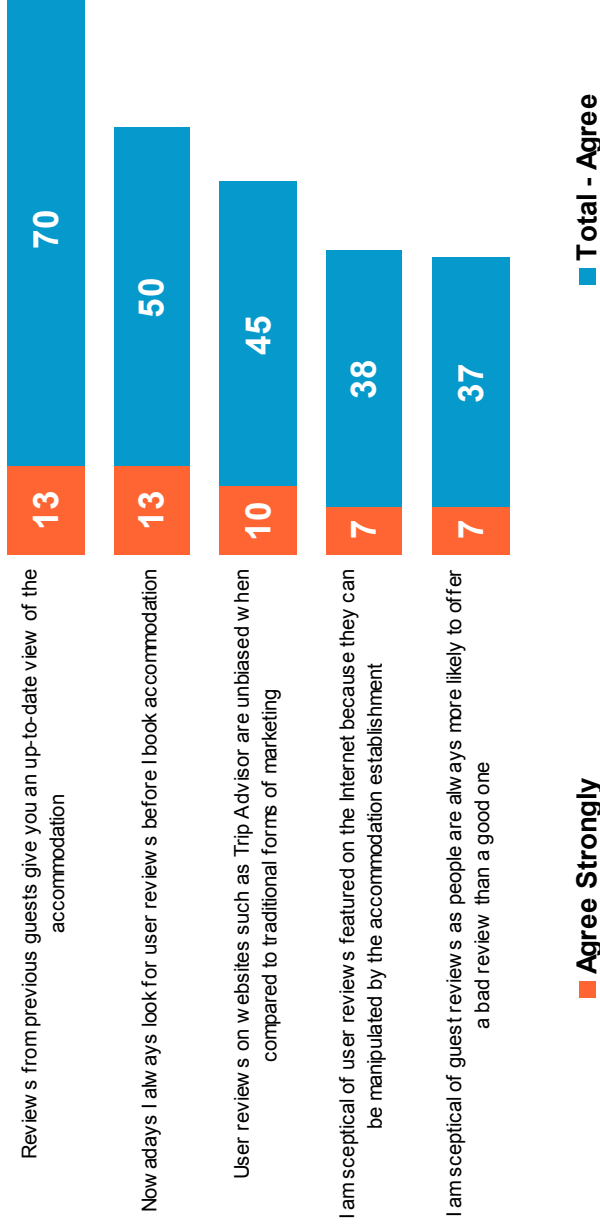


Where did they go on the Internet?

	RESEARCHING	BOOKING
Search engine website (e.g. Google)	47%	18%
A specific hotel/hotel chain/B&B website	43%	39%
A booking search engine e.g. Expedia	34%	27%
Review websites e.g. Trip Advisor	24%	8%
A map website e.g. Google Earth	21%	7%
Regional/local tourist board websites	15%	6%
VisitBritain website	13%	5%
VisitEngland website	12%	4%
VisitScotland website	11%	4%
Airline/ferry company websites	9%	6%
The AA website	6%	3%
Visit Wales website	5%	2%

Sample size: All those using internet to research and book most recent UK trip – 667 respondents

Attitudes towards User Reviews (%)



- Two in five are sceptical of user reviews but the majority agree that they do provide up-to-date information on accommodation with half agreeing that they “**always use reviews**” when booking accommodation
- Women (57%) and Young Independents (57%) more likely to agree that they “**always use user reviews**”. Men are less likely than average – 45%
- Younger Independents also more likely to agree that people are “**always more likely to offer a bad review than a good one**” (44% agree). Men slightly more likely to agree – 41%

Key findings on choosing accommodation

- En-suite facilities, VFM/price and location are of critical importance to leisure users. For business users, the context of their use of accommodation promotes the importance of Wi-fi connections and parking with VFM/price of less importance and en-suite facilities probably considered as a 'given'
- Vast majority recognise the star ratings as playing a significant role in the choice of accommodation with 1 in 3 always using them and less than 1 in 10 never using them
- Even allowing for the inherent bias as a result of the survey method, clear evidence of the importance of the Internet as an information source for choosing accommodation. Previous experience and recommendations clearly the other 2 main sources
- Variety of websites used for researching accommodation – search engines, both general and for accommodation booking, review websites, individual hotel sites and tourist boards. For actually booking, greater concentration on individual hotel sites and booking search engines
- Evidence from the qualitative research that some consumers are using the Internet to conduct detailed searches based on facilities required rather than stars

Who inspects and assesses serviced accommodation in the UK? (%)

	Total (%)	UK residents (%)	Overseas residents (%)
Total tourist board (Net)	56	65	33
The national tourist boards	37	44	18
The AA	36	47	6
England (Net)	36	40	24
RAC	24	31	5
VisitEngland	23	25	16
VisitScotland	19	22	10
VisitBritain	16	18	11
Regional local authorities	15	16	10
Northern Ireland Tourist Board	14	16	8
Visit Wales	14	16	8
EnjoyEngland	13	14	8
The UK Government	7	7	8
Don't know	32	22	59

- National tourist boards and AA are dominant
- A third of respondents (32%) answered 'don't know', this was particularly the case with overseas respondents – Germany (73%) and France (45%) – combined 3 in 5 (59%) overseas visitors did not know who were responsible
- A quarter of respondents (24%) thought that the 'RAC' were responsible

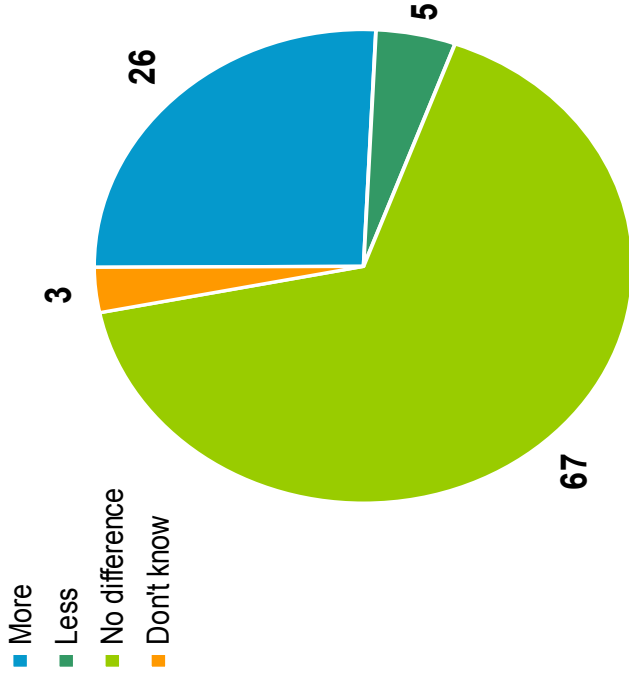
How much do we trust the various ratings schemes?

	Official rating scheme	Trip Advisor ratings	Trip Advisor reviews	Hotel's own ratings	Other star ratings
Trust completely (5)	13%	6%	8%	6%	6%
(4)	44%	33%	34%	17%	30%
(3)	31%	38%	37%	41%	46%
(2)	5%	10%	11%	24%	10%
(1)	2%	2%	2%	8%	2%
Don't know	4%	12%	8%	4%	7%
Mean score	0.63	0.35	0.37	-0.11	0.3

- Encouragingly, the official star rating was more likely to be trusted 'completely' (5) or trusted 'slightly' (4) – 57%. This compares to 42% for Trip Advisor reviews. Hotel's own ratings were less likely to be trusted with 23% claiming they trusted 'completely' or 'slightly'

The star ratings are administered by the National Tourist Boards and the AA (%)

■ Does this make you trust the ratings more, less or does it make no difference?



- A quarter (26%) claimed they were likely to trust the ratings more having being told this information
- In a separate question, three quarters (74%) claimed that their opinion of the star ratings had not changed in the last few years.
- A smaller proportion (15%) stated they now had a more positive opinion of them

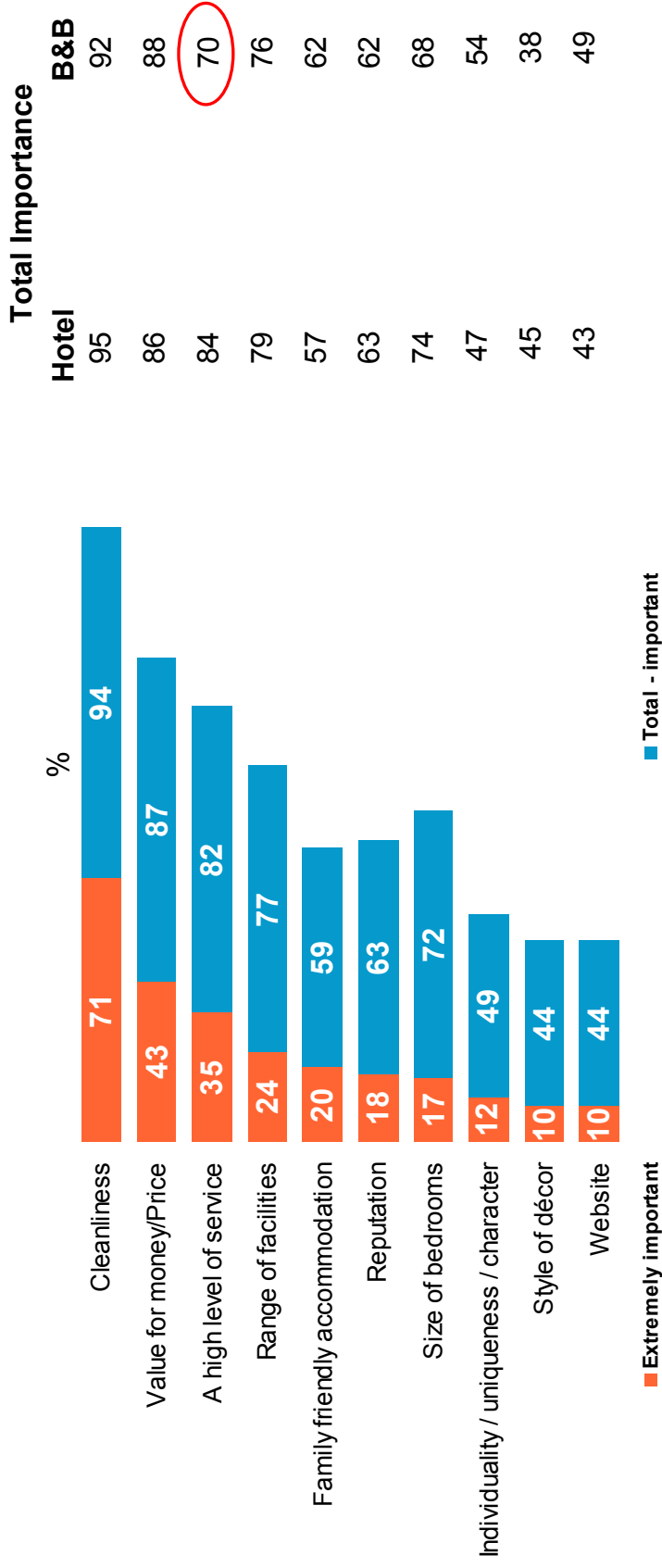
Key findings on trust in the assessment system

- National Tourist Boards and AA recognised as being behind the inspection of accommodation in the UK with some legacy recognition for the RAC
- However, 1 in 3 are unaware of who is involved in the assessment scheme
- Considerable level of trust in official ratings scheme – more so than for Trip Advisor, both ratings and reviews. However, Trip Advisor trusted much more so than ratings by individual hotels
- Trust in Tourist Boards and AA reinforced after prompting – 1 in 4 believing that the ratings are to be trusted more because of this association
- The ‘presence’ of the AA within the gradings process serves to make the scheme appear less regional, more national and more credible – this needs to be more strongly referenced

“They’ve missed the people who think the AA is good. I’d disregard the material as I wouldn’t expect it to cover all GB.”

(Empty Nester, Birmingham)

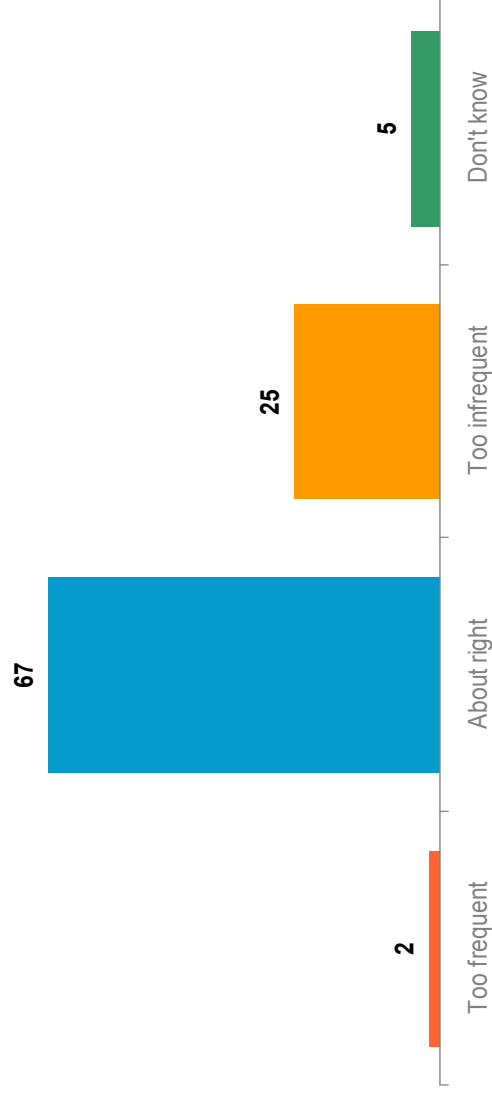
Relative importance of factors to be included in assessment



- Visitors feel that the 'hygienic' factors of cleanliness, service and range of facilities are the most important aspects to be included within the rating schemes, alongside price/VFM
- Only one in ten visitors thought that it was extremely important that websites should be included within the rating scheme; a similar level to that for décor and character
- Those staying in hotels more likely to claim that 'a high level of service' is important compared to those staying in B&Bs (84% vs. 70%)

Frequency of Assessment Visits

Quality assurance of hotels, guest houses and bed and breakfast establishments take place on an annual basis to ensure the accommodation meets the standards required of the awarded rating. In your opinion, is this frequency of visit:



- The majority thought that frequency of quality assurance is about right (67%)
- This was particularly the case for those staying in Guest Houses (79%) and Empty Nesters (73%)
- However, those on a business trip were more likely to think the assessment visits were too infrequent (31%)

Key findings on Inspections

- While majority regarded the annual inspection as being an appropriate frequency, a significant minority of 1 in 4 regarded it as being too infrequent – especially amongst those travelling on business
- User generated content, by its interactive, up-to-date nature has highlighted the need for inspections either to be more frequent, or for the processes behind them to be more explicit

“Only once a year, you could have caught the hotel with a good service on. In the autumn it might be dreadful. You need something to complement alongside it..”
(Young Family, Birmingham)

Conclusions and Recommendations (1)

- No doubt that star ratings are important to consumers in their choice of serviced accommodation, but they are far from being of crucial importance. While the Internet has allowed consumers increased access to a wider range of information over and above star ratings, in a guide book or brochure, the status of the stars has been maintained through their role as a ‘filter’, used by consumers in refining their search;
- Some concern that, in the future, consumers will use more specific requirements as the Internet search criteria for accommodation choice, rather than the somewhat ‘blunt instrument of a certain category of stars. It is vital that the details of the assessment scheme are communicated to consumers allowing them to use it in a more informed way rather than its limited application at present;
- High level of use of user reviews and ratings as they represent another stage in the process of accommodation choice, but once again, not of crucial importance in the final choice. In contrast to other information available, user reviews are more likely to provide up-to-date and less biased details of the accommodation. Consumers appear to be quite ‘savvy’ in their interpretation of the comments – viewed with a healthy degree of scepticism. There is no compelling evidence to support the formal inclusion of user reviews within the assessment scheme;

Conclusions and Recommendations (2)

- There is little doubt that the strong association of the assessment scheme with the national tourist boards and the AA reinforces its credibility and integrity. There is a high level of trust in the scheme because of this linkage. Every opportunity should be taken to remind consumers of the ‘owners’ of the scheme, the processes involved and importantly its national coverage;
- The need to include both the quality of service provided as well as the facilities available has been confirmed. Also, the approach whereby all facilities and services should be of the graded standard was endorsed by consumers;
- Clear identification of the ‘basic’ factors such as cleanliness, high level of service and range of facilities as being ‘core’ within the assessment. Reference to value-for-money/price can be seen as setting the context within which consumers make their assessment of the ‘quality of the offering’. Those factors which may reflect personal taste, such as décor and character, were seen to be less significant as was the inclusion of an assessment of the establishment’s website;
- A clear need for communication of the central features of the assessment scheme to consumers – the better they understand the scheme, the more likely they are to make the right choice of accommodation. It could be argued that the high levels of readership of user reviews has filled some of the ‘vacuum’ between the use of star ratings as a filter and a real understanding of the assessment scheme;

Conclusions and Recommendations (3)

- Serious consideration should be given to a reduction in the number of designators and also to ensuring that the retained ones are clearly and easily understood by consumers;
 - Is there a real need for Guest Accommodation and Metro Hotel?
 - Restaurant with Rooms and an Inn – one rather than two?
- Annual inspections are the minimum which will be accepted. Once again, need for further promotion to consumers of the process involved in the assessment schemes as a means of reassuring them about the integrity of the scheme;
- Consumer support for sustainability and accessibility to be issues which accommodation establishments take into account and promote to consumers, where appropriate. Less clear is whether there is a strong argument for their inclusion in the formal assessment scheme.

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