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# Common Standards Review - Self Catering Consumer Research

## Summary of Findings

### Topline Findings

- Levels of awareness and use of the star rating scheme are lower for self-catering accommodation than in the serviced sector, with self-catering brands such as Country Cottages and Hoseasons providing a surrogate measure of quality, particularly given the limited availability of independent third party reviews.
- When presented with details of the official scheme, consumers were immediately interested, and knowing that it was run by the National Tourist Board increased levels of trust, suggesting that there is certainly scope to build awareness of the scheme in order to enhance its value to consumers.
- Cleanliness ranked higher than all other aspects in the consumers' view of what should determine a property's grading, followed by aspects relating to facilities (number of bathrooms, provision of bath and shower and range of kitchen appliances).
- The vast majority of those using self-catering accommodation felt that the properties they stayed in met, or in many cases exceeded, expectations.
- Accessibility, more than sustainability, was seen as being relevant to the way properties are graded, though with some queries about exactly how this might be implemented across the wide range of property types.



### Objectives

Research was carried out to explore consumer attitudes towards star ratings within the self-catering sector, in order to:

- Explore consumer awareness and understanding of the quality assurance scheme
- Understand the decision-making process for self-catering accommodation (and the role of star ratings within this)
- Understand attitudes towards grading requirements for self-catering properties
- ...and therefore identify areas for improvement of the scheme, as well as identifying communications priorities.

### Methodology

The research was carried out in two phases. In July 2010, 4 group discussions were held in London and Manchester with individuals who had taken a self-catering holiday in the past year. Results from this initial phase helped inform the design of the second, quantitative phase, in which 803 respondents were interviewed using an online methodology in September 2010.

## Summary of Findings

### Accommodation Decision-Making

The most important factors when deciding on serviced accommodation were location, price/value (particularly in comparison to size), provision of free bed linen, parking facilities, availability of bath and shower, and the range of kitchen appliances.

The star rating was relatively less important than many other property characteristics, with less than half claiming to know the rating of the last property they stayed in (vs. almost  $\frac{3}{4}$  in the serviced sector).

The qualitative research also highlighted consumer confusion between the “official” scheme and star ratings issued by individual accommodation providers. This suggests that actual usage of the official scheme may in reality be lower than the three quarters who claim to use it at least “sometimes” when choosing properties.

*“There are different ratings and you just have to take a chance I suppose. It depends where it is and who the rating is by.”*

57% claimed that they “usually” stay in properties which are 3 star or higher (vs 15% saying 4 star or higher), though again, given the limited understanding of the scheme, this is perhaps more an indication of what is viewed as an acceptable minimum level than a reflection of actual behaviour.

Over 80% used the Internet to research and book accommodation, with 28% relying on recommendations from friends and family, though traditional brochures still play a role, and are used by one in four.

Two thirds of those questioned had booked at least once in the past with self-catering brands (Cottages4you, Hoseasons and Country Cottages were most popular), and indications from the qualitative work were that these organisations provide consumers with a basic guarantee of standards in a sector where independent third party information is hard to come by.

*“Something better than if you were to find something independently. It’s their job, the agent categorises them.”*

### Trust in Awarding Bodies

Awareness of who awards ratings is lower in the self-catering sector than in the serviced sector (just 53% citing the tourist boards even when prompted with a list of options), while over one in three simply did not know.

Nonetheless, the official rating scheme has a higher level of trust than other assessment options (TripAdvisor ratings and reviews, other star ratings), and once the association with the tourist boards was mentioned, 36% said that this increased their level of trust. This was underlined in the qualitative research, when an explanation of the scheme led to increased consumer interest.

*“Are they independent? Assessors? That should be bragged up a bit more!”*



## Expectations and Priorities

Consumers were asked to state spontaneously what they thought determined the star rating. The word cloud below summarises the responses, highlighting the key elements of cleanliness and facilities



When asked to assess the importance of a series of factors for awarding gradings, cleanliness was again viewed as being by far the most important factor to include in the assessment (70% describing this as “extremely important”) followed by provision of both bath and shower, the range of kitchen appliances, and offering an adequate number of bathrooms and toilets for guests.

While it was expected that provision of a TV would be included (important for 74%), aspects such as Internet/Wifi (42%) and other entertainment options (41%) were seen as less central.

Many expected the style of the décor to be considered (68%), and though only 57% thought that the property’s individuality/character should be evaluated, the qualitative research underlined that for some, this element of uniqueness and authenticity is a core reason for choosing a self-catering break over other holiday types.

When asked specifically about different service offerings by star rating, Internet/Wifi was seen as something of greater relevance to higher rated (3 or 4 star) properties, whereas offering a welcome pack, making up beds on arrival and providing a fridge freezer were seen by many as quite basic offerings which could be expected even at one or two star.

## Accommodation Performance

Among those who claimed to remember the star rating of their property, over 90% described the place they stayed as meeting (49%) or exceeding (44%) expectations. Similarly, cleanliness was as expected (68%) or better than expected (25%) for the vast majority of guests.

Among the minority (17%) who encountered any problem with their accommodation, two thirds were at least quite satisfied with the way it was resolved.

## Sustainability and Accessibility

The majority (70%) agreed that the rating scheme should take into account whether the property can accommodate guests with accessible needs, though the qualitative research indicated that many interpreted this as being about broad access to a property, and questioned how this would work for properties that by their nature were difficult to access

*“A ground floor apartment would be 5 star for accessibility but a lighthouse would be 1 star”*

Only around half agreed that sustainability should be included in the quality assessment, supporting qualitative findings that respondents didn’t see this as such a key factor in decision making. However, it should be noted that sustainability in its broadest sense is something people may well value on a self-catering holiday, a part of the authentic experience sought by many visitors.

*“We would all pay extra for local food and the kids would say “what do they make here?” You would experience that and the people in the village would know we’re helping.”*

