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**Hotelstars Europe**  
**Results of a customer survey**  
**in a nutshell**

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St. Gallen, November 2013

## **Table of contents**

Introduction	2
1 Introduction	3
2 Goals of the study and approaches	4
3 Data collection	4
4 Results	5
4.1 Satisfaction	5
4.2 Expectations	5
5 Conclusion	8

## 1 Introduction

The internationalization in tourism demand calls for an **internationalization on the supply side**. As **core service providers** in tourism, hotels are at the forefront of this process (in terms of their infrastructure and service scope). Such services are **intangible** and thus – from the customer perspective – **information intensive**, which is why the key **constitutive element of accommodation-related information**, i.e. hotel **classification schemes**, need to be internationalized as well. National classification schemes are becoming a rather odd phenomenon in this increasingly globalized world. (International) tourists basically do not stop at borders and are not willing to cope with a plethora of classification systems.

In 2009, hotel associations from Switzerland, Austria, Germany, Sweden, the Netherlands, the Czech Republic and Hungary therefore established the Hotelstars Union with the goal to develop a **harmonized classification scheme** for the hotels in their countries. This scheme was built on the foundations of existing national classifications systems. However, and due to the on-going changes in demand, it was obvious that this harmonized classification scheme would need more customer-oriented revision sooner or later.

This is why in 2012 a **revision process was initiated** with the goal of **further adapting the classification scheme to customer needs** wherever necessary and appropriate. A number of studies was launched to increase the knowledge about classification schemes in general, and the guests' needs in particular. One of these studies, commissioned to the Institute for Systemic Management and Public Governance at the University of St. Gallen, had the goal to **identify further the needs and wishes of guests regarding a hotel overnight stay**.

## 2 Goals of the study and approaches

The study had a twofold approach.

1. The first part of the study aimed at identifying **key factors of satisfaction with a hotel overnight stay**, for the following rationale: If one knows which attributes make people happy or unhappy with a given hotel stay, one knows which features to potentially include in a classification scheme.<sup>1</sup>
2. The second part of the study aimed at identifying **hotel guests' expectations towards hotel overnight stays**. The approach for this was based on a Kano methodology, identifying if selected infrastructure and service attributes would need to be classified as either **must-haves**, **should-haves**, or **nice-to-haves**. This classification can later be used directly for the hotel classification scheme.<sup>2</sup>

## 3 Data collection

Data was collected by means of a **self-administrated online survey** which was developed together with our partner Customer Alliance in Berlin. The national hotel associations were in charge of recruiting the test persons. To access the survey, a number of different channels was available, including social media. The selection of the agents was based on an open-access approach in all of Europe, i.e. the survey was open to everyone who was interested in giving their opinion (**convenience sample with self-selection**). Data collection took place from March 7, 2013 (launch at ITB), and lasted until July 2, 2013.

Overall, **4,242 questionnaires** were completed. Large shares came from Germany, the Czech Republic, Hungary, Switzerland, Austria, Italy, and Sweden. 57 % of the surveys were filled in by women, 43 % by men. Two thirds of the participants were well or very well educated and inhabited professional positions.

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1 Those attributes are not measured directly but indirectly by explaining the co-variances of (a) overall satisfaction, (b) intention to return, and (c) intention to recommend by satisfaction attributes; i.e. by deriving the satisfaction attributes from (a), (b), (c).

2 The Kano model is a theory of product development and customer satisfaction developed in the 1980s by Professor Noriaki Kano. It originally classifies customer preferences into five categories.

**Must-haves:** These attributes are taken for granted when fulfilled but result in dissatisfaction when not fulfilled.

**Should-haves:** These attributes result in satisfaction when fulfilled and dissatisfaction when not fulfilled. These are attributes that are spoken of and the ones which companies compete for.

**Nice-to-haves:** These attributes provide satisfaction when achieved fully, but do not cause dissatisfaction when not fulfilled. They are not usually expected.

The **sample is by no means representative** for the population in those countries. However, this does not pose a major problem, as this study does not intend to produce any predictive representative forecast but rather intends to **explain individual behaviour and to derive from that the attributes to include in a future classification scheme.**

## 4 Results

The results from the study are quite extensive, which is why only a snapshot can be presented in this short paper.

### 4.1 Satisfaction

To put it straight forward, **satisfaction with a given hotel overnight stay** can be essentially explained with the **following five attributes** (these are the ones with the highest potential to create dissatisfaction):

1. Quality (comfort) and size of bed
2. Connectivity (wireless, cable, phone etc.)
3. Access to food and drinks (not necessarily by means of a mini-bar or a restaurant; there are other means that come to mind, such as shops)
4. State of sports and spa infrastructure (where available)
5. Location of hotel (suitable / congruent with reason to stay overnight)

The above results suggest a very simple message: It is a very small number of attributes that essentially drives very large shares of satisfaction.

5

### 4.2 Expectations

The results of this section of the study support the results discussed in the previous section.

Before going into detail, please take notice of the **logic of the overall result:**

- In one-star hotels, i.e. at the **lower end of the classification scheme**, most attributes are either **should-haves** or **nice-to-haves**. There are hardly any *must-haves*.
- In five-star hotels, i.e. at the **upper end of the classifications scheme**, most attributes are either **must-haves** or **should-haves**.

This logic is in line with what one would expect from the results in general: In most one-star hotels, people are happy with what they get. In contrast, guests of five-star hotels often have higher expectations of what they are supposed to get.

**Independent of the star classification**, there is a number of attributes, which have to be fulfilled or should be **fulfilled in all hotels, no matter if one- or five-star**. These attributes are:

- Width of bed at least 160 cm; better more (a 200 cm bed is an attractor)
- Online accessibility (WiFi or wired)

- Accessibility to drinks and snacks (mini-bar or equivalent)
- Telephone in room (most likely to call for services and other rooms)
- Minimal entertainment in room (TV and radio)
- Iron facilities (in room or offered)

Other than regarding the key factors of satisfaction, we can observe a number of differences between various hotel classifications. The major star-specific *must-haves* / *should-haves* as opposed to *nice-to-haves* are presented in the following table:

**Table: Attribute classification according to hotel stars**

<b>Class</b>	<b>Top 10 <i>must-haves</i> / <i>should-haves</i></b>	<b>Top 10 <i>nice-to-haves</i></b>
*	<p>Gym / sports facilities            Width of the bed at least 160 cm            WiFi in room            Mini-bar in room</p> <p>NO MORE <i>MUST-HAVES</i></p>	<p>Indoor pool            Personal safe in room            Width of the bed at least 160 cm            Bathtub (including shower) in bathroom            Outdoor pool            Hotel room larger than 20 m<sup>2</sup>            Radio programs in room            Width of the bed at least 200 cm            Iron facilities in room            Width of the bed at least 180 cm            Up-to-date TV infrastructure in room</p>
**	<p>Meeting/ conference facilities            Radio programs in room            Personal safe in room            Width of the bed at least 160 cm            Mobile access with several customer services            Iron facilities in room            Mini-bar in room            Gym / sports facilities            Width of the bed at least 160 cm            Complaints handled adequately            Barrier-free accessibility</p>	<p>Information on hotel services digitally available in room            Room service in hotel            Size of the hotel room larger than 20 m<sup>2</sup>            Daily newspapers / magazines available in hotel            Water boiler, tea bags and coffee in room            Personal information services            WiFi access in public areas            Bar            Hotel reception open 24/7            Parking facilities</p>
***	<p>Telephone in room            Radio programs in room            Wired internet in room            Safety            Iron facilities in room            Barrier-free accessibility            Complaints handled adequately            Mini-bar in room            Meeting/ conference facilities            Width of the bed at least 160 cm</p>	<p>Daily newspapers / magazines available in hotel            Width of the bed at least 200 cm            Water boiler, tea bags and coffee in room            Information on hotel services digitally available in room            Bathtub (including shower) in bathroom            Correspondence folder in room            Toilet separate from bathroom            Size of the hotel room larger than 20 m<sup>2</sup>            Vanity mirror in bathroom            Information material about the destination in hotel</p>

**Table: Attribute classification according to hotel stars (continued)**

Class	Top 10 <i>must-haves / should-haves</i>	Top 10 <i>nice-to-haves</i>
****	WiFi in room Radio programs in room Safety Barrier-free accessibility Complaints handled adequately Wired internet in room Mini-bar in room Telephone in room Meeting/ conference facilities Width of the bed at least 160 cm	Water boiler, tea bags and coffee in room Bathtub (including shower) in bathroom Width of the bed at least 200 cm Toilet separate from bathroom Guest recognition system for individual guest preferences Information material about the destination in hotel Information on hotel services digitally available in room Hotel reception open 24/7 Daily newspapers / magazines available in hotel Spa facilities
*****	Bar WiFi in room Meeting/ conference facilities Complaints handled adequately Check-in and check-out handled efficiently Safety Mini-bar in room Barrier-free accessibility Telephone in room Width of the bed at least 160 cm	Information on hotel services digitally available in room Guest recognition system for individual guest preferences Bathtub (including shower) in bathroom Indoor pool Width of the bed at least 200 cm Vanity mirror in bathroom Toilet separate from bathroom Daily newspapers / magazines available in hotel  <i>NO MORE NICE-TO-HAVES</i>

## 5 Conclusion

As mentioned above, this paper merely provides a snapshot of the results.

First of all, there is only a small number of attributes essentially driving satisfaction / dissatisfaction with an overnight stay in a hotel. Also, there is only a rather small number of attributes, which are determining expectations toward an overnight stay. After all, it is the main aim to **make sure that hotel guests...**

- ... can sleep safely in proper surroundings (bed, room etc.)
- ... have the opportunity to help themselves with food and drink,
- ... have the possibility to communicate with people who are not present (i.e. connect electronically),

and do all of that at a place or at a location which is ideal for their travel needs.

As a result, we therefore recommend to **shorten the list of attributes rather than extending** it. However, the remaining attributes should allow for even **better discrimination**, for example by increasing the number of levels per attribute.

There are two advantages for that:

- First of all, it allows for a clearer and much more transparent **positioning** on a **small but transparent number of attributes**.
- Secondly, the **less exhaustion of regulation** there is in a classification system (regulation in the sense of **number of possible dimensions regulated**), the more **options remain for hotels to position themselves on increasingly fragmented markets**.

The rationale for the latter is based on the fact that classification systems are good **anchors for information**. They also serve as possible **indicators for future willingness to pay**: The more they are adapted to customer needs, the more they could also be indicative for the willingness of different future guests to pay. And it is with this goal that the classification system of Hotelstars Europe should be further developed.