World Tourism Organization

UNWTO

Hotel Classification Systems:
Recurrence of criteria in 4 and 5 star hotels

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Foreword

The dramatic rise of international tourism, from the pursuit of the privileged few only half a century ago to a truly worldwide phenomenon today, has seen the sector become a bedrock of our global economy, representing 9% of the world's GDP, 30% of service exports and one in every eleven jobs.

But even as travellers become increasingly adventurous, seeking new and unexplored destinations, they still demand certain indicators of what they are about to experience. Official hotel classification systems have long provided such indications/information relating to accommodation.

There is no worldwide standard for official hotel classification systems, and there may well never be one due to the incredible diversity of the environmental, socio-cultural, economic and political contexts in which they are embedded. However, there are without doubt commonalities which unite accommodation of various standards across the globe. Identifying such commonalities, as well as differences, can help destinations in establishing or revising their classification systems in such a way that they are relevant and useful to consumers, hotels, intermediaries and destinations alike.

In this regard, this report takes an in-depth look at recurrence of criteria in 4 and 5 star hotels, comparing them across 30 European destinations and 6 global destinations. In addition to the comparison of criteria, the report provides a general overview of the types of hotel classifications that currently exist, their benefits and challenges, and offers general guidance on areas to consider when setting up an official classification system.

We would like to thank the Ministry of Trade, Industry and Fisheries of Norway for partnering with UNWTO through the QualityMark Norway department of Norwegian Accreditation in the development of this report, which follows on from our joint report on Online Guest Reviews and Hotel Classification Systems: An Integrated Approach. The contribution of QualityMark Norway to the report is yet another example of the excellent research the department carried out on hotel classification in Norway and internationally, and of the leadership of Norway in this field.

Taleb Rifai
Secretary-General, World Tourism Organization (UNWTO)

Executive Summary

Hotel classification systems are widely used in the accommodation sector as a means of providing an indicator to both consumers and intermediaries on the standards to be found at individual establishments.

Moreover, hotel classifications can provide useful marketing platforms for individual hotels and for destinations wishing to promote the quality of their offer.

However, the existence of multiple systems worldwide is a challenge. There exist at least five different approaches, and within each approach there can be different practices and processes. This can confuse the consumer, particularly in a global market.

This report compares the recurrence of classification criteria in 4 and 5 star hotels across 30 European destinations and 6 global destinations with a view to identifying general trends and providing guidelines for destinations wishing to revise existing or establish new hotel classification systems that meet the needs of consumers, hotels, intermediaries and destinations.

The comparison of the recurrence of classification criteria in 4 and 5 star hotels in the global and European groups revealed that despite the existence of many types of classification systems, there are many more similarities than differences, both between the geographic groups and between the star categories.

With regards to the geographic comparison, the proportion of criteria assigned to various hotel departments is almost identical in the European and global groups, though differences are more prominent among individual destinations and sub-regions. “Room” is the top department in terms of proportion of criteria across all destinations that were assessed.

In terms of the comparison of star categories, in the vast majority of cases, classification criteria in 5 star criteria catalogues are also reflected to some extent in 4 star criteria catalogues. Moreover, for the most recurring classification criteria in 5 star criteria catalogues, there is little to no difference with their rate of recurrence in 4 star criteria catalogues.

The findings of the report also suggest that more regular reviews of hotel classification systems can be useful in order to keep them up-to-date with rapidly evolving consumer needs, particularly with regards to technology and accessibility.

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1. Introduction

Hotel classification systems are widely used in the accommodation sector as a means of providing an indicator to both consumers and intermediaries on the standards to be found at individual establishments. This is particularly important in a sector where the product (i.e. the accommodation) is bought / listed sight-unseen (i.e. consumers/intermediaries are not able to see or test the product offering before the purchase / listing is made). Moreover, hotel classifications can provide useful marketing platforms for individual hotels and for destinations wishing to promote the quality of their offer.

Nevertheless, establishing a classification system for tourism accommodation is a complex undertaking due to the diversity of both accommodation types and of the cultural, environmental and economic contexts in which the systems are embedded.

This report provides an overview of the main hotel classification systems in operation in Europe and selected global destinations, and makes comparisons between the systems and the range and recurrence of criteria in 4 and 5 star category hotels. The report draws on research on the development and status of hotel classification systems undertaken by UNWTO and the QualityMark Norway programme of Norwegian Accreditation, a public body under the Norwegian Ministry of Trade, Industry and Fisheries.

With a view to assisting destinations in developing and reviewing classification systems, the report addresses a range of areas, including, but not limited to, the benefits and challenges of classification, key findings from the comparisons of 4 and 5 star accommodation, and recommendations.

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2. Methodology

The comparisons are made using two groups of countries. The first group (henceforth known as global group, or GG) includes six destinations representing a global spread of both emerging and established destinations. The second group (European group, or EG) is comprised of 30 European countries. A total of 34 national systems were reviewed, 30 in the EG and six for the GG. Portugal and Germany are included in both the European and global groups.

For the GG, national classification systems were collected for Australia, (destination offering city tourism as well as unique eco-friendly accommodation units), Germany (both business and leisure destination, and part of HotelStars Union), India (key emerging destination), Portugal (important European tourism destination that is not a member of HotelStars Union), South Africa (geographical spread), and the United States of America[1] (destination of worldwide renown offering a very wide range of accommodation facilities).

The EG included all the EU countries except Finland[2], as well as Iceland, Norway and Switzerland, totalling 30 countries[3] and 21 criteria catalogues. Within this group:

- Ten form part of HotelStars Union (Austria, Czech Republic, Germany, Hungary, Latvia, Lithuania, Luxembourg, Malta, Sweden and Switzerland), and hence represent one criteria catalogue.

- Four HotelStars Union members, namely the Netherlands, Belgium, Estonia and Denmark, are still in transition and will not use the Hotelstars Union (HSU) criteria until 2015. Hence, they are represented with their respective national criteria catalogues.

- One HotelStars Union member, Greece, has made the HSU star rating voluntary in addition to the mandatory Greek system. The Greek criteria are used in this comparison.

- Italy and Spain have regional systems with differing minimum standards. These have been reviewed and for the purpose of this exercise a composite set of criteria has been compiled for each country.

- The United Kingdom of Great Britain and Northern Ireland consists of England, Wales, Scotland and Northern Ireland. The same criteria are used for all four territories.

The assessment looks at the minimum requirements for 4 and 5 star hotels. In order to draw out these requirements from such a diversity of sophisticated systems, the following steps were taken:

Desk Research: National criteria catalogues were collected for selected destinations.

Translation: Translations were made for those criteria catalogues which are not in English. The language was adjusted where appropriate in order to draw out the essence (common denominators) of the criteria, hence rendering them more amendable for comparison. The translated versions were sent to respective countries to ensure accuracy of interpretation.

Comparison: The criteria were grouped into specific service/product areas in order to facilitate comparison. The service/product areas were applied to all selected destination criteria catalogues and the spread of recurrence shown in each category.

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Listing: Taking one area at the time, a comprehensive database was produced for each product/service area, listing the most obvious common criteria for the 4 and 5 star categories and marking whether or not they applied to all 25 criteria sets. When a criterion did not apply to at least 60% of the countries being compared, it was not included in the comparison spreadsheet.

Comparison: A weighting of 1 was assigned to a mandatory criterion for every time that it appears, whereas a weighting of 0 was assigned to optional criteria and 0.5 if to criteria that are mandatory on request. The average of the presence of each criterion was then calculated in order to produce a percentage scale displaying its frequency.

In addition to the comparison of national criteria catalogues, comprehensive desktop research and consultations with industry representatives was carried out to give context to the findings of the report.

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1. For the United States of America , the AAA Diamond system was selected out of multiple options due to its size an popularity in the USA.
2. Finland does not have a hotel classification system.
3. Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Ireland, Iceland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, United Kingdom.

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3. Hotel Classification Systems

Overview of hotel classification systems

Classification systems can be divided into those that evaluate objective criteria only and those that evaluate both objective and subjective criteria, with further specificities grouped according to the five different approaches listed below. Within each approach, the systems can be either statutory or voluntary in different variations.

What is hotel classification?

Hotel classification is the ranking of hotels, usually by using nomenclature such as stars (or diamonds), with one star denoting basic facilities and standards of comfort and five stars denoting luxury in facilities and services. The purpose is to inform intending guests in advance on what can be expected in order to reduce the gap between expected and experienced facilities and service delivery. The terms 'grading', 'rating', 'classification' and 'star rating' are used to refer to the same concept, i.e. to rank hotels by their facilities and standards.

Traditional classification systems: These consist of mandatory objective criteria, sometimes in combination with additional voluntary criteria. The fulfilment of the criteria is checked by auditors or inspectors. Site inspections are performed by qualified inspectors. Germany (HotelStars Union) and India are among the nations using the traditional system.

Classification systems with ISO certified inspectors: The French classification system consists only of mandatory criteria and is, in this regard, similar to traditional systems. Inspections are carried out by accredited third party inspection bodies. Other countries are slowly

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following up on higher qualification requirements for their auditors, demanding certified bodies to carry out the auditor training.

Classification including quality assurance: Systems including quality assurance consist of two elements: the objective criteria and the evaluation of the delivery of quality on some of these criteria. The hotel is not necessarily awarded for the number of facilities, but rather for the quality of those services offered. The control is exercised by advisors (assessors), who guide hoteliers to improve their product. Scotland, Iceland and Australia are among the countries that include the quality element in their classification.

Classification systems including guest reviews: Central to these systems is the inclusion of guest reviews in addition to mandatory criteria. The hotels are controlled through inspections on all criteria. Norway previously included guest reviews in the total evaluation and Abu Dhabi has recently launched classification system incorporating guest reviews.

Trust based systems: Such systems are used, for example, in Slovakia and consist of one set of criteria, where the hotels themselves evaluate their compliance with the criteria without any audit or control.

There exist three distinguishable designations for hotel classification assessors.

- Internal Auditor: In trust-based systems, as in Slovakia, the hotel or hotel group completes self-assessment with an internal auditor.
- Advisor/Assessor: In systems which include quality assurance, as in Scotland, Iceland and Australia, advisors/assessors complete the assessment and if necessary will advise the operator on improvements that might be made.
- Inspector/Auditor: Assessments of compliance with ISO or other third party accreditation standards criteria are completed by qualified inspectors/auditors who nominate the star rating for the hotel without advice or recommendations for improvements. Practiced in some countries using the HotelStars Union system, as well as France.

The following two tables set out the principal variations in classification systems in the six GG destinations and in selected European destinations. Except for the United States of America, the nomenclature used is “one to five stars”. The Australian system, in which the importance to the guest of the facility or service is weighted in the marking, is arguably the most sophisticated.

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Table 1. Hotel classification systems in global group

	Australia	Germany (HotelStars system)	India	Portugal	South Africa	USA
Implementing organisation	Star Ratings Australia on behalf of the Australian Auto Clubs	Under the patronage of HOTREC, HotelStars Union was established in 2008 with seven countries. Now has fifteen countries. The system is implemented under the auspices of the national hotel associations	A voluntary system implemented by the Hotel and Restaurant Approval and Classification Committee under the auspices of the Ministry of Tourism and Hotel Associations	National Tourist Board	Tourism Grading Council of South Africa (TGCSA)	American Automobile Association (AAA) The AAA was selected from multiple systems as it is best known and with greatest coverage. Evaluates 33,000 premises annually in USA, Canada, Mexico and the Caribbean.
Nomenclature	One to Five Stars	One to Five Stars plus a "Superior" award where the standards are just short of the next highest rating. A Garni is awarded for hotels only offering breakfast.	One to Five Stars plus Five Star Deluxe	One to Five Star	One to Five Star	One to Five Diamonds
ISO / Independent quality assurance	Accommodation Association of Australia, as well as a dedicated Industry Advisory Board and Industry Advisory Panels for each rating category	Mystery Guests are used to check service and comfort quality	No	No	No	No
Criteria and implementation	The criteria were updated in 2013. and comprise 216 criteria over five key areas: Facilities, Services, Cleanliness, Quality and Condition. Each area is weighted to reflect importance to the guest, e.g. Bedroom 25% weighting; Recreation facilities 12% weighting. The cleanliness and the quality level of the elements are included.	270 criteria. Some of which are mandatory with emphasis on: Quality management; Wellness, Sleeping, Accommodation. The measurement is based on the presence or absence of the elements. Revised criteria as of January 2015.	144 criteria. Self-assessment followed by formal application and assessment by the Classification Committee composed of ministry and association representatives. The measurement is based on the presence or absence of the elements.	139 criteria. Self-assessment followed by inspection by the National Tourist Board. The measurement is based on the presence or absence of the criteria.	947 criteria. Self-assessment followed by formal assessment by TGCSA. The quality level of the elements is included.	199 criteria revised in 2013 to reflect evolving industry trends and guest expectations. Approval granted first then assessed for Diamond rating. In addition there is a third section for four and five diamond ratings. This includes the four and five diamond hospitality service expectations within the following areas: Reservation, Arrival and Check-in Evening Housekeeping Room Service Departure Services The quality level of the elements is included.

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	Australia	Germany (HotelStars system)	India	Portugal	South Africa	USA
Criteria and implementation	The criteria were updated in 2013. and comprise 216 criteria over five key areas: Facilities, Services, Cleanliness, Quality and Condition. Each area is weighted to reflect importance to the guest, e.g. Bedroom 25% weighting; Recreation facilities 12% weighting. The cleanliness and the quality level of the elements are included.	270 criteria. Some of which are mandatory with emphasis on: Quality management; Wellness, Sleeping, Accommodation. The measurement is based on the presence or absence of the elements. Revised criteria as of January 2015.	144 criteria. Self-assessment followed by formal application and assessment by the Classification Committee composed of ministry and association representatives. The measurement is based on the presence or absence of the elements.	139 criteria. Self-assessment followed by inspection by the National Tourist Board. The measurement is based on the presence or absence of the criteria.	947 criteria Self-assessment followed by formal assessment by TGCSA. The quality level of the elements is included.	199 criteria revised in 2013 to reflect evolving industry trends and guest expectations. Approval granted first then assessed for Diamond rating. In addition there is a third section for four and five diamond ratings. This includes the four and five diamond hospitality service expectations within the following areas: Reservation, Arrival and Check-in Evening Housekeeping Room Service Departure Services. The quality level of the elements is included.
Frequency of inspections	3 years	3 years	5 years	4 years	Annual	Frequent
Top 3 Areas by percentage of Criteria	Room, Bathroom, Services	Room, Bathroom, Services	Room, F&B, Services	Room, Bathroom, F&B	Room, F&B, Services	Room, Bathroom, Services
Special Features	The system allows for recognition of varying room standards within a property under certain parameters. Primary, Split and Multiple ratings. The primary star rating is awarded to the majority of rooms. A split star rating may be awarded to the other rooms and a multiple rating can be awarded to a third group. From 2015 online reputation scores are presented in parallel to star ratings.	Traditional system with concentration on the presence or absence of the elements.	Traditional system with concentration on the presence or absence of the elements. Hotels required to participate in Skills Development initiative of the Ministry of Tourism. Also categorise heritage hotels into: Heritage Grand; Heritage Classic; Heritage Basic.	Traditional system with concentration on the presence or absence of the elements.		One to Five Diamonds Hotels that qualify for 5 Diamonds are subject to a series of unannounced visits to assess the guest services/ hospitality including an overnight stay.

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Table 2. Hotel Classification systems in selected countries in Europe

	Italy	Spain	United Kingdom	France	Poland	Sweden
Implementing organisation	Regional Authorities	Regional Governments	Quality Tourism on behalf of Visit England System also operates in Scotland, Wales and Northern Ireland	National Government registration and classification implemented through the regional prefecture	National Government	An independent branch of the Hotel Restaurant Association
Nomenclature	One to Five Stars plus "5 Star L" for deluxe	One to Five Stars and 5 star delux	One to Five Stars	One to Five Stars and Palace for 5 star only	One to Five Stars	One to Five Stars and superior level for 2-5 stars. Garni 1-4 star hotels only serving breakfast.
ISO / Independent quality assurance	No	No	No	Assessed by accredited 3rd party inspection bodies	No	No
Criteria and implementation	55 criteria (National reference) Mandatory system implemented by the regional authorities	261 criteria Mandatory System Implemented by regional governments	498 criteria Voluntary system. Hotels that opt in are included in Visit England promotional activities. The quality level of the elements is included	246 criteria Voluntary system implemented by the regional prefectures	52 criteria Mandatory system Implemented by national authority	270 criteria Voluntary system Implemented by Hotel Restaurant Association
Frequency of inspections	Depends on region	Only initial and when change of ownership	Annual	5 years	2 years	Annual
Top three areas by percentage of criteria	Room, Front Desk, Services	Room, Bathroom, Services	Room, F&B, Services	Room, Front Desk, Services	Room, Bathroom Services	Room, Bathroom, Services
Special features			Professional assessors, who in addition to assessing the star rating provide detailed reports for the operators and offer advice.		Relief from certain requirements for hotels in heritage buildings	

Benefits and challenges of hotel classification

The main benefits and challenges of hotel classification accrue primarily, but not exclusively, to consumers (guests), accommodation providers, travel agents and implementing agencies, and are listed in Table 3.

In terms of benefits, in addition to providing comparable information through easily communicable symbols and serving as justification for rates, classification also provides hotels with a benchmarking tool which in turn can help them to prioritize investments. Five key benefits of classification include:

1. Easing first-time consumer concerns. As opposed to the retail industry, a guest cannot try out the goods prior to their purchase. Classification offers an indication of what is to be expected, thereby contributing to consumer confidence before, during and after his/her stay.

2. Providing a common framework for all intermediaries, such as tour operators and travel agencies, to use in their purchasing processes and negotiations, preparation of catalogues and customization of packages.

3. Providing a reference point for online guest review platforms, by placing the reviews within an appropriate context (e.g. a review in a one star hotel is likely to be based on different expectations from a review in a five star hotel). This in turn helps reduce the gap between consumer expectations and experience.

4. Serving as a marketing and promotion tool. By displaying their stars, hotels are in effect promoting their specific characteristics and additional services, within the framework of the relevant classification system. In this light, governments will often reform their classification systems in an effort to upgrade the quality of their national tourism offer.

5. Providing the hotel profession with a coherent framework that makes it possible to evaluate in a consistent manner a highly diverse range of accommodation types, many of which are microenterprises.

Among the greatest challenges pertaining to classification systems is the great number of different systems around the world and the multiple independent ratings by online travel agents and guest reviews sites, as well the need to keep criteria up-to-date with evolving consumer expectations and behaviour.

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Table 3. Main benefits and challenges of official hotel classification

Consumers	Accommodation providers	Travel agents (online and offline)	Implementing organisation
	Positioning independent and small hotels	Positions hotels online	Positioning destination
Improved service quality	Quality focus for destination, thereby increasing its attractiveness		Increased tourism service quality
	Quality assurance		
Expectation indicator	Expectation indicator	Expectation indicator	Consistent manner of evaluation
Standards information		Standards information	
Neutral informant		Neutral standards informant	
	Credibility of offering	Credible informant	
Better informed tour operators and travel agents	Marketing platform		Marketing platform
Reassurance		Reassurance	
	Increased guest satisfaction		Increased tourist satisfaction
Product transparency	Product transparency	Product transparency	Product transparency
Predictability Comparability	Predictability Comparability	Predictability Comparability	
			Attract investment
	Justified rates	Justified rates	
	Increased rates and margins		
	Focus and motivate staff		
	Internal control/ management/ Strategic maintenance planning	Improved networking	Simplified monitoring
	Simplified procurement		Simplified tender procedures

B E N E F I T S

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Consumers	Accommodation providers	Travel agents (online and offline)	Implementing organisation
Multiplicity of systems and system implementation		Multiplicity of systems and system implementation	
	Evolving consumer expectations	Evolving consumer expectations	Evolving consumer expectations
			Employing qualified assessors
Misleading self-classification by hotels	Misleading self-classification by hotels		
	Matching price to classification		
	Evolving consumer expectations and their impacts on criteria		Keeping criteria up to date with more informed consumer expectations
		Inconsistency in interpreting	Keeping it understandable and relevant for the consumer
Higher rates due to classification expenses	Classification expenses		The financial sustainability
Growth in use of Guest Review sites and OTAs	Requires integration/interface with OTA	Lack of interface to the OTA	Requires integration/interface with OTA
			Frequency of re-assessments
Lack of quality and service-focused elements			Definition and assessment of subjective elements
			Providing for varying forms of accommodation e.g. boutique, heritage etc.

C H A L L E N G E S

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Key findings and observations on hotel classification systems

- Hotel classification provides for the identification of agreed-upon standards and can guide consumer choice, destination quality management and equitable pricing.

- Hotel classification can also be used as a development tool to enhance the quality of tourist accommodation, provided the following conditions are in place.

- The quality assessors/inspectors are competent and qualified to give advice and guidance to operators[4].

- Changes in customer expectations are monitored through market research and other means and introduced to the registration and/or classification criteria.

- Cancellation of registration or lowering the classification does not take place before the operator is advised on necessary improvements and given a specific time frame to implement them.

- The operator is advised on how to make the improvements and any priorities within the necessary improvements.

- Hotel classifications facilitate the ability of independent and small hotels to position themselves in a global market where large hotel brands have grown and have an increasing impact on consumer selection.

- Systems are generally implemented by state or regional organizations. Automobile clubs and hotel associations also carry out this role in various destinations.

- All the classification systems reviewed consist of three basic components: criteria for each rating; the assessment process and the communication of the rating or the nomenclature.

- The majority of systems rely on objective criteria only, i.e. the presence or absence of a service or facility and the dimensions of bedrooms, etc. “Room” and “Bathroom” are top-three criteria in all classification systems in both the GG and EG. “F&B” and “Services” follow closely in importance.

- The underrepresentation of subjective elements has led to a growth in consumer dependence on guest reviews.

- The multiplicity of systems and implementation systems can confuse consumers. There exist at least five different approaches, and within each approach there can be different practices and processes.

- Comparability across accommodation types remains an important challenge, e.g. a consumer can in fact go from a 4 star hotel and then switch to a bush lodge, a bed & breakfast or other type of accommodation, all the while expecting a similar quality of experience, but with different amenities. It is important to ensure a fair competition among the different types of accommodation.

- The changing demand and expectations of consumers (e.g. technological advances, accessibility, etc.) presents a challenge with regards to the revision of the wording of criteria and standards[5]. A revision demands an allocation of resources both in terms of manpower and in terms of cost. The challenge is to map these needs and implement new criteria before facing a new requirement. It is common knowledge in the hospitality industry that the luxury of today is merely the expectations of tomorrow.

- Given the rapid evolution of services and expectations in the hotel industry, frequent inspections are more likely to align demand and expectations.

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4. Several countries and organisations recruit the assessors from the hotel management field so as to have experienced competent people with the ability and credibility to make the assessments and give advice.

5. Although the expectation of the amenity types do not change over time, the wording of criteria and standards may need to reflect changing demand and expectations of consumers with regards to the specifications of the amenities, e.g. flatscreen television, wireless internet connection, wheelchair-friendly access, etc.

4. Criteria

Comparison of criteria

This chapter addresses the recurrence of criteria in 4 and 5 star categories across different accommodation departments in the European and global groups. The percentage share of criteria allocated to each area within 4 and 5 star categories is measured[6]. The results indicate the relative importance given to these departments within the classification system. They do not however take into account any weighting which may be assigned to certain criteria sets within individual classification systems, and should as such be seen as broadly representative, if not wholly accurate.

The EG is divided by geographic zone, except for countries using the HotelStars Union classification system, which is considered a sub-group of its own.

HotelStars Union	Austria, Czech Republic, Germany, Hungary, Latvia, Lithuania, Luxembourg, Malta, Sweden and Switzerland
Western Europe	Belgium, Ireland, Netherlands and United Kingdom
Nordic countries	Denmark, Estonia, Iceland and Norway
Mediterranean	Croatia, Cyprus, France, Greece, Italy, Portugal and Spain
Eastern Europe	Bulgaria, Poland, Romania, Slovenia and Slovakia

6. For the criteria which include specific measurable requirements, an average of the values is calculated. The criteria and respective results for the EG and GG are listed in Annex I.

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Table 4 Percentage share of criteria in the European group (%)

Room	32	30	29	25	28	27
F&B	11	20	12	18	5	15
Bathroom	18	12	14	13	15	14
Services	18	10	20	10	17	13
Front Desk	11	14	7	8	7	9
Public Areas	1	3	5	9	13	8
Access	1	4	3	8	6	6
Exterior & General	2	2	4	3	4	3
Communication	4	2	5	1	0	2
Temperature Control	1	2	2	2	3	2

Table 5: Percentage share of criteria in the global group (%)

Room	32	21	22	33	34	30	30
Bathroom	18	10	12	15	18	21	16
F&B	11	17	15	13	6	8	12
Services	18	19	13	8	12	11	11
Front Desk	11	14	7	6	8	9	8
Public Areas	1	6	6	10	9	10	8
Access	1	6	12	5	2	4	5
Exterior & General	2	0	0	3	9	4	3
Communication	4	0	0	1	1	1	1
Temperature Control	1	5	2	0	2	2	1

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Most Recurring Criteria

The most recurring criteria in 4 and 5 star categories in the European and global groups are set out in Table 6 below for the following hotel areas: Room, Bathroom, Front Desk, Food and Beverage, Services and Miscellaneous. Criteria which are found in the 5 star category but not in the 4 star category are highlighted in grey. Absence of criteria in either one of the geographic groups, or in the 4 star category, has the impact of significantly reducing the average score for those criteria.

Table 7 shows the least recurring criteria in the European and global groups (average score less than or equal to 26%).

Table 6: Most recurring criteria in 4 and 5 star hotels across European and global groups

Most recurring criteria in 4 and 5 star hotels across European and global groups		Percentage Recurrence				
	CRITERIA	4 star		5 star		
		Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
ROOM	Telephone with external line	97	83	97	83	90
	Desk, work table, chair	76	100	79	100	89
	1 Seat /chair per bed	90	83	86	83	85
	Wardrobe or clothes niche	86	83	90	83	85
	Reading light by each bed	86	83	86	83	84
	Minibar	81	67	88	83	80
	Adequate number of hangers	79	83	72	83	79
	Bedside table/tray	76	83	76	83	79
	Internet	66	83	72	83	76
	Wardrobe or clothes hangers	69	83	69	83	76
	Safe in Room	59	67	93	83	75
	Power Socket	67	83	69	83	75
	Full length mirror	79	67	79	75	75
	Luggage rack	76	67	76	67	71
	Waste basket	76	67	76	67	71
	Quality requirements mattress/bed	59	83	59	83	71
	Appropriate room lighting	55	83	55	83	69
	Bed size specifications single & Double	66	67	66	67	66
	Radio (any device to listen to radio channels)	76	50	79	50	64
	Writing utensils and note pad	74	33	78	50	59
	Blinds to fully darken room	41	50	76	67	58
	Curtains or similar	31	67	45	67	52
	2 Pillows per person	36	33	78	50	49
	Bathrobes and slippers in room	31		90	67	47
	Correspondence folder	53	33	60	33	45
	Pay TV or similar	3	67	20	67	39
	Spy hole/peek hole in door	3	67	10	67	37
	Suite requirements	1	17	79	50	37

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Most recurring criteria in 4 and 5 star hotels across European and global groups	Percentage Recurrence				
CRITERIA	4 star		5 star		
	Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
BATHROOM					
Number of bathroom amenities	97	100	97	100	98
Percentage of en suite bathrooms	93	83	93	100	92
Bath rug	76	100	83	100	90
Number of towels per person	86	83	90	83	85
Light over WHB	70	100	70	100	85
Wash hand basin	86	83	86	83	84
Hair dryer	90	67	93	83	83
Waste bin	80	83	80	83	81
Mirror	84	67	84	67	75
Shelf or Tray of toiletries	66	67	66	67	66
Facial tissues	53	67	56	67	61
Power socket near mirror	63	50	63	50	56
Glass/toothbrush tumbler	72	33	72	33	52
En suite and bathroom size requirements		67		67	33

Most recurring criteria in 4 and 5 star hotels across European and global groups	Percentage Recurrence				
CRITERIA	4 star		5 star		
	Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
FRONT DESK					
Front desk hours of Operation	86	100	86	100	93
Lounge in Lobby area	79	100	86	100	91
Parking or valet parking	79	83	83	83	82
Luggage Service (porter)	69	50	93	83	74
Luggage Room	69	67	76	67	70
International Credit Cards Accepted	83	50	83	50	66
Number of Languages required	79	50	79	50	64
Safe at front desk	79	40	86	40	61
Valet Parking	7	50	62	100	55
Concierge	3	33	72	83	48

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Most recurring criteria in 4 and 5 star hotels across European and global groups	Percentage Recurrence				
CRITERIA	4 star		5 star		
	Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
FOOD AND BEBERAGES					
Dinner service restaurant	69	83	93	100	86
Room service breakfast	69	83	83	100	84
Room service offer	76	83	90	83	83
Beverage offer lobby area	86	83	76	83	82
Breakfast requirements	97	67	97	67	82
Bar	72	83	86	83	81
Room service beverage offer		83	66	100	62
Lunch service	10	33	52	83	44

Most recurring criteria in 4 and 5 star hotels across European and global groups	Percentage Recurrence				
CRITERIA	4 star		5 star		
	Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
SERVICES					
Fax available	72	100	72	100	86
Wake-up service	69	100	72	100	85
Laundry service	86	67	93	83	82
Hotel Information (a – z)	79	83	83	83	82
Internet available in public areas	55	92	69	92	77
Public phone in lobby	83	67	83	67	75
Iron board & iron	34	67	72	83	64
Guest PC	59	67	62	67	64
Photocopying available	52	67	52	67	60
Shoe polish service/machine	62	50	72	50	59
Daily newspaper available	72		83	67	55
Ticket and transport service	31	17	76	50	43
Daily cleaning & change of linen on request		83		83	41
Turn down service	3	17	62	67	37
Message delivery service		67		67	33
Business centre		67		67	33

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Most recurring criteria in 4 and 5 star hotels across European and global groups	Percentage Recurrence				
CRITERIA	4 star		5 star		
	Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
MISCELLANEOUS					
Maximum number of floors before lift is mandatory	90	83	93	83	87
AC or ventilation in public areas	45	83	80	83	73
Heating option in room	59	67	85	67	69
Rooms with adjustable AC	24	67	83	100	68
Sporting facilities		50		67	29

Table 7: Least recurring criteria in 4 and 5 star hotels across European and global groups

Most recurring criteria in 4 and 5 star hotels across European and global groups	Percentage Recurrence				
CRITERIA	4 star		5 star		
	Europe (%)	Global (%)	Europe (%)	Global (%)	Average (%)
SERVICES					
Accessible for guests with reduced mobility	17	33	21	33	26
Ventilation in bathrooms	19	33	19	33	26
Shoe horn in room	3	17	45	33	24
Sanitary bags in bathrooms	31	17	31	17	24
Gift shop or similar	10	17	24	33	21
First aid equipment	24	17	24	17	20
Separate entrance for guests and luggage	21	17	24	17	20
Adapters available	21	17	21	17	19
DND signs	17	17	21	17	18
Toilet stool in bathroom	4	0	49	17	17
Sofa in room	14	17	14	17	16
Telephone in bathroom	3	17	24	17	15
Online booking	10	17	14	17	14
Secretarial service	7		14	33	13
Uniform name tags	22		26		12
Foreign exchange/currency available	17		17		8
Separate toilet in bathroom			10	17	7
Artwork in room	10		10		5
Umbrella in room or front desk	3		10		3
Hair dresser service	3		10		3
Trouser press in room	3		9		3
TV requirements in room (i.e. flatscreen or not, specific channels and languages available)	1		1		1

Most Recurring Criteria

More detailed comparison of classification criteria in 4 and 5 star categories in EG and GG are listed in greater detail in Annex II, while some broader observations are listed below.

- The top four criteria categories are the same in the European and Global Groups, though F&B and Bathroom are ranked differently in the two, as per the table below.

Global group	European group
1. Room	1. Room
2. Bathroom	2. F&B
3. F&B	3. Bathroom
4. Services	4. Services

- The average ranking of criteria categories in the EG mirrors that of the GG (except for the inversion of Bathroom and F&B, referred to above). However, much greater variation in the ranking exists when individual criteria catalogues for different destinations are compared. For example:

- In Western Europe, Front Desk has a higher proportion of criteria than both Bathroom and Services.

- In Eastern Europe, F&B is only ranked seventh in terms of proportion of criteria. In Australia and the United States of America, it ranks sixth.

- The United States of America assigns a significantly greater proportion of criteria to Exterior & General than any other destination

- Room is the leading criteria catalogue across all destinations.

- The recurrence of criteria relating to the various criteria sets are on the whole very similar between the EG and GG.

- For the most recurring criteria, there is typically little to no difference in recurrence between 4 and 5 star hotels.

- "Accessible for guests with reduced mobility" is present in only 26% of criteria catalogues, demonstrating a lost opportunity to encourage greater destination accessibility.

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5. Conclusions

There exists a multitude of types of official hotel classification systems across the globe, varying in terms of criteria, management and monitoring, but all essentially serving the same primary and crucial purpose of providing information on a product which is often purchased/listed sight unseen. This multiplicity of systems can nevertheless be a challenge for consumers, accommodation providers, travel agents and implementing agencies, hence some general recommendations on setting up a relevant and comparable classification system are outlined in Annex III.

The comparison of the recurrence of criteria in 4 and 5 star hotels in the global and European groups revealed many more similarities than differences, both between the geographic groups and between the star categories.

With regards to the geographic comparison, the proportion of criteria assigned to various hotel departments is almost identical in the EG and GG, though differences are more prominent among individual destinations and regions. Room is the top department in terms of proportion of criteria across all destinations that were assessed.

In terms of the star category, in the vast majority of cases, criteria in 5 star criteria catalogues are also reflected to some extent in 4 star criteria catalogues. Moreover, for the most recurring criteria in 5 star criteria catalogues, there is little to no difference in their recurrence in 4 star criteria catalogues.

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Based on this quantitative assessment of recurrence of criteria, a few qualitative questions and issues arose.

- Are criteria moving in step with evolving technology and associated consumer expectations? With today's consumers' dependence on being connected to the internet, it is striking that the criterion "Fax available" is more recurrent than both "Internet available in public areas" and "Internet in Rooms". This may indicate some inertia in adapting to evolving needs, for example due to infrequent revision.

  Moreover, criteria in general will only identify the generic technology required, as opposed to the specifications, e.g. internet in public spaces is mandatory, but it does not specify that wifi should be available. Arguably, these specifications are not included because it is implicit that hotels will offer up-to-date technology.

- There is little focus on accessibility. "Accessible for guests with reduced mobility" has a low recurrence of 26%. Given that an estimated15% of the world population has some form of disability, such a low score in both the EG and GG may reflect the lack of appreciation of the needs of travellers with reduced mobility in all destinations, and should be addressed both as a matter of principle and as a business opportunity.

- The results in the present report must be assessed in view of all related national regulations. For example, the need for "first aid equipment", with an average score of only 20%, would seem to indicate an absence of health and safety measures. However in many destinations such matters are covered under other national regulations and legislation, which raises the interesting issue of the scope of responsibility of the classification system. Clearly, there must be careful coordination with other regulations in order to ensure that there is coherence in transversal issues such as health & safety, sustainability, etc.

Annexes

ANNEX I

Comparison of measurable criteria

For the criteria including specific requirements, an average of the values is calculated in cases where values are specified.

The criteria and respective results for the European group and global group are listed below.

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Table 8: Measurable criteria in global group

CRITERIA	4 star	5 star
Front Office operation	19 hours	24 hours
Number of floors before lift is required	1,8 floors	1,8 floors
Number of towels per person	2,2 towels	2,4 towels
Room service operation	16 hours	24 hours
Room size single room	14 m2	18 m2
Room size double room	16 m2	20,5 m2
Bathroom size	3,4m2	4 m2
Language skills front of house	2 languages	2,3 languages
Bed size single bed	92 cm * 200 cm	92 cm * 200 cm
Bed size double bed	163 cm * 200 cm	177 cm * 200 cm
Number of power sockets in room	2,8	2,8
Suite requirements	Min 1	Min 2

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Table Table 9: Measurable criteria in Europe

CRITERIA	4 star	5 star
Number of bathroom amenities	3,68 units	5,21 units
Percentage of en suite bathrooms	100 %	100 %
Number of floors before lift is required	1,9 floors	1,4 floors
Number of towels per person	2,3 towels	2,3 towels
Room service operation	16 hours	23,5 hours
Front Office operation	21 hours	23,5 hours
Room size single room	12,5 m2	14,8 m2
Room size double room	18 m2	20,9 m2
Language skills front of house	2 languages	2,5 languages
Bed size single bed	92 cm * 200 cm	92 cm * 200 cm
Bed size double bed	163 cm * 200 cm	177 cm * 200 cm
Number of power sockets in room	1,8	2

ANNEX II

Comparison of criteria in 4 and 5 star categories in European group and global group

Overall:

- Of all criteria listed in the report, the "Number of bathroom amenities" scores highest with an average of 98%, followed by "Front Desk Hours of Operation" at 93%.
- "TV requirements in room" scores the lowest with an average of only 1%.

Room:

- The top criterion in Room is "Telephone with external line", ranging from 83% (GG 4*) to 97% (EG 4* and 5*) recurrence, with a 90%. This is followed by "Desk, worktable and chair", which ranges from 76% (EG 4*) to 100%" (GG 4* and 5*), producing an average of 89%.
- Other highly recurrent criteria include "1 Seat/chair per bed" (avg. 85%), "Wardrobe or clothes niche" (avg. 85%) and "Reading light by each bed" (avg. 84%). "Mini bar" also scores high with an average of 80%.
- The only criterion which appears in the 5* category but not a 4* category is "Bathrobes and slippers in room" (appears in GG 5*, but not GG 4*).

Bathroom:

- "Number of bathroom amenities" tops the Bathroom criteria at an average of 98%, and it is also the highest average in the overall criteria. It is followed by "% en suite bathrooms" at 92% and "Bath rug" at 90%.
- For "Number of bathroom amenities", "Bath rug" and "Light over WHB" there is 100% recurrence in both 4 and 5 Star hotels in the GG.
- "En suite and bathroom size requirements" is the only requirement which is not reflected in both groups, appearing only in the GG.

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Front Desk:

- "Front desk hours of operation" scores the highest average of 93%, with 100% recurrence in both 4* and 5* hotels in the GG. This is followed by "Lounge in the lobby area", which has an average of 91% and which also has 100% recurrence in both star categories in the GG.

- The most significant difference between 4 and 5 Star hotels, in both the EG and GG, was the requirement for concierge service.

- The acceptance of international credit cards and the need to speak international languages have higher scores in the EG (83% and 79% respectively in both 4* and 5* hotels) than in the GG (50% in both groups and both star categories). This may indicate a stronger response by European destinations to meet the proliferation of the usage of credit/debit cards and the greater recognition in Europe of the need to cater for international travellers with language limitations.

Food and beverage:

- "Dinner service restaurant" tops the F&B criteria with an 86% average, followed by the "Room service breakfast" with 84%; both have 100% recurrence in 5* hotels in the GG.

- "Room service beverage offer" also has 100% recurrence in 5* hotels in the global group and 83% in 4* hotels, while in the EG it has 66% recurrence in 5* hotels but does not appear as a criterion in 4* hotels.

- "Lunch service" scores the lowest with an average of 44% and only 10% for 4* hotels in the EG.

Services:

- "Fax available" tops the Services department with an average of 86%, followed by "Wake-up service" (85%) and "Laundry Service" (82%).

- Both "Fax available" and "Wake-up service" show 100% recurrence in both 4* and 5* hotels in the GG.

- Several criteria figure prominently in the GG but do not appear in the EG - "Daily cleaning & change of linen on request" (83% in both 4* and 5* hotels), "Message delivery service" (67% in both 4* and 5* hotels) and "Business centre"(67% in both 4* and 5* hotels).

- The only criterion which appears in the 5* category but not a 4* category is "Daily newspaper available" (67% GG 5*).

- In general, IT-related Service criteria are focused on the broad type of amenity, rather than specifications (e.g. there is a requirement for internet, as opposed to wifi). Moreover, the leading ranking of "Fax available" is an indication of classification systems not responding in real time to evolving consumer expectations.

Miscellaneous:

- "Lifts: Number of floors before mandatory" tops the miscellaneous section with an average of 87%.

- "Sporting facilities" are scored only for the GG. The majority of European systems would consider such facilities as being outside the criteria for the hotel classification.

Least Recurring:

- The low recurrence of some of these criteria may perhaps indicate insufficient consideration of some important issues, e.g. accessibility and health and safety measures.

- It should be noted that "Accessible for guests with reduced mobility" has an average score of only 26% (higher in GG than in the EG). This reflects the lack of appreciation of the needs of travellers with reduced mobility in all destinations.

- The lack of need for "First aid equipment" with an average score of only 20% (higher in the EG than in GG) underlines the absence of health and safety measures. However, in many destinations such matters are covered under other national regulations and legislation.

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ANNEX III

Setting up / revising hotel classification systems

There is no universal best-fit for an official classification system, due in principle to the great diversity of contexts in which they operate. However, the process of mapping the recurrence of criteria in different classification systems around the globe has provided insight into broad guidelines that can be followed when developing such a system. In this light, when reviewing existing classification schemes or introducing a new scheme, the following recommendations are suggested for consideration by the implementing organisation in consultation with other regulatory authorities and the industry:

- Any classification system must be industry-endorsed and based on actual consumer needs.

- A classification system should be simple, easy to understand, specific and trustworthy, for all stakeholders. Careful consideration should be given to the wording of criteria. Simplicity for the sake of communication is always an advantage.

- When setting up a classification system in a new destination, or renewing an existing system, consider building it within the framework of a strong and renowned system, preferably a system comparable to that of the destination of origin of the majority of the guests.

- Online guest reviews play a significant role in a guests' decision making process. As such, a classification system should be easily accessible and interfaced with online travel agents and guest review sites. Moreover, the inclusion of, or even integration of guest reviews, should be considered. See also the report "Online Guest Reviews and Hotel Classifications: An Integrated Approach" (UNWTO, 2014).

- In a rapidly evolving technological landscape, related requirements in classification systems should respond to purpose rather than design, e.g. the radio, as new research shows, is indispensable in a hotel room., but there are no requirements dictating whether it should stand alone or be integrated.

- Decision on the selection and number of criteria should be based on a destination-specific analysis made prior to setting up the system. Consideration should also be given to general trends in recurrence across the globe. This report shows that Room, Bathroom, F&B and Services are the four most important areas for a guest. The criteria set should reflect this in order to be relevant.

- Limited and agreed derogations should be allowed where structural issues impede historical or heritage buildings in complying with the criteria.

- Hotel classifications are generally more beneficial to individual hotels than large hotel chains, hence consideration should be given to providing relevant marketing or other benefits for becoming classified.

- The issue of deciding who should monitor and control classification systems is crucial. Although there are

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several methods of performing control (by assessors, inspectors, auditors, evaluators, hidden guest, announced/unannounced), it is recommended that the experts who perform control and monitoring are competent and qualified to give advice and guidance to the operators, especially in cases where subjective elements are assessed. It is noteworthy that there is an increase in the desirability and requirement of certifications and verifications to be performed by third parties.

- In the case that cancellation of registration or downwards re-classification is recommended following inspection, the operator should be advised on the improvements necessary to avoid such action and be given a specific time frame in which to implement the required improvements

- Since overall market and tourist demands are subject to changes, it is important to consider the issue of updating the classification systems. This includes determining the frequency of amending the criteria, as well as who should be involved in the development of the criteria initially and after establishment. If resources are available, the development of criteria should be based on data collected on the guest mixture and their needs and behaviour.

- To improve the value of classification to international tourists, national and regional tourist organizations and industry bodies should explore the possibility of introducing a more universal classification system, while recognizing that regional and national variations cannot be avoided.

- The issue of whether the system should differentiate between different types of hotels or locations or if it should be developed to handle all types should be discussed based on the total accommodation offer in that destination. Some systems use notations or similar to distinguish the different types, while other uses different categories of accommodation, each with a different set of criteria.

- The increasing global focus on sustainability and accessibility should be reflected in both criteria and in their weighting. Given that these themes are currently reflected in a relatively small number of classifications, destinations have an opportunity, in this regard, to take a lead on these issues.

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