



VISIT WALES/CROESO CYMRU

Quality Assurance

Serviced Accommodation Harmonised Grading Scheme

Impact Survey Report 2008

CONTENTS

	Page
<i>Report on <u>Hotel</u> sector</i>	
Content of Tables	3
Introduction and Background	4
Methodology	5
Objectives of the review and topics covered	5
Responses received	6
Main findings –	
Grading, its benefits and operational issues;	7
Harmonisation- views and outcomes;	13
Issues of concern about the harmonised scheme;	15
Environmental issues and harmonisation	24
Future intentions regarding grading participation.	26
 <i>Report on <u>Guest Accommodation</u> sector</i>	
Content of Tables	30
Responses received	31
Main findings –	
Grading, its benefits and operational issues;	31
Harmonisation- views and outcomes;	38
Issues of concern about the harmonised scheme;	41
Environmental issues and harmonisation;	49
Future intentions regarding grading participation	52
Summary - Hotels	54
Guest Accommodation	55
Recommendation	57

Note: All figures in this report are rounded to whole numbers.

Contents of Tables

Table 1 – Rating of grading benefits, by <i>Star rating</i>	Page 9
Table 2 – Rating of grading benefits <i>by area</i>	Page 10
Table 3 – Responses to Assessors periodically staying overnight	Page 12
Table 4 – Responses to use of Voucher to pay for stay	Page 12
Table 5 - Comparison of views on harmonisation from consumer viewpoint with its impact on business	Page 11
Table 6 – Illustration of change of Star rating after harmonisation	Page 14
Table 7 - Harmonised grading outcomes and expectation levels Analysed by Star rating	Page 14
Table 8 – Views on areas of concern about harmonisation	Page 19
Table 9 – Future intentions on continued participation in Visit Wales grading, by Star rating	Page 26

Introduction

In 2002 the national tourist organisations for Wales, Scotland and England were tasked by their respective governments to bring about an increase in the quality of tourist facilities across Britain and one means of doing this was via the accommodation rating schemes. At that time each country operated its own individual grading schemes but it was agreed that it would be a major benefit if domestic and overseas visitors could be feel assured that, wherever they stayed in Britain, the level of quality would be the same in each country. Consequently, in 2003 Wales Tourist Board (WTB), Visit Britain, Visit Scotland, the AA & RAC began a review process to harmonise the accommodation grading schemes except that for the caravan park sector which was already harmonised. It also gave these bodies the opportunity to bring the schemes up to date, based on consumer and trade research. The first scheme worked on was the self catering sector and first draft of the standards for the serviced sector was ready by spring 2004.

Background

In summer 2004, consumer research was undertaken and in November that year, material prepared was issued to the industry for consultation via a special edition of Trade Talk. In January 2005, Wales Tourist Board discussed harmonisation proposals with BHA Wales and WTA Small Serviced Sector Forum. By February, WTB, AA, RAC, VB and VS officers arrived at a preferred position having reviewed trade research and industry views, and approval from WTB Board was sought. By April 2005, businesses received details about the new scheme and WTB Assessors began conducting advisory visits. On 1 October 2007, the harmonised scheme became the official rating scheme of Visit Wales.

While the harmonised scheme retained much of the old WTB scheme, changes included the introduction of sectional consistency (aspects of the business required to achieve at least the same level of quality in key areas), more facility requirements and intrinsic quality are now required of hotels in particular. No significant criteria changes are required of Guest Accommodation and the majority were always expected to retain their old WTB rating with a quarter expected to move up a rating. Harmonisation also afforded the opportunity to review the Designators, with some such as "Country House" being removed, and new ones being introduced, e.g. "Small Hotel".

Survey Methodology

An online questionnaire was sent to 1346 serviced operators in grading during May 2008. This splits into 242 graded under the Hotels scheme and 1104 under the Guest Accommodation scheme. The regional spread is as follows:

Hotels

North Wales	81
Mid Wales	50
South West Wales	51
South East Wales	60

Guest Accommodation

North Wales	349
Mid Wales	324
South West Wales	280
South East Wales	151

4 weeks were given for a response and anonymity assured with data only being used in aggregate form.

A reminder was issued 10 days prior to deadline.

Objectives of the review and topics covered

Having given this harmonised scheme time to bed in, Visit Wales now needs to know what the change has meant for operators here, whether there are issues of concern about the scheme for this sector, and if so, should Visit Wales seek changes to the scheme, whether there are issues specific to a region and finally, operators or their agents were asked to suggest any changes to help guide future scheme development. Visit Wales also wanted to know if it is the intention of the respondents to continue in the grading scheme for the foreseeable future and if not, what issues are influencing those intentions.

Respondents were invited to answer questions and give views covering 4 main issues – Grading and its benefits, Harmonisation, Environmental good practice & harmonisation and their Future grading scheme participation intentions.

Responses received

262 completed questionnaires were received back, of which 38 were from Hotels and 224 from those graded under the Guest Accommodation scheme (20% of all serviced contacts). Regionally, for both serviced sectors, these split as follows:

38% (98) North Wales	31% (81) South West Wales
20% (54) Mid Wales	11% (29) South East Wales

Note: The harmonised grading system for Serviced Accommodation has two schemes- one for the Hotel sector and the other for Guest Accommodation. This report will deal with each sector separately.

HOTELS REPORT

38 hoteliers responded to the questionnaire, 16% of all Visit Wales graded hotels contacted.

The regional split of the 38 is as follows:

34% (13) North Wales	34% (13) South West Wales
24% (9) Mid Wales	8 % (3) South East Wales

Responses by number of bedrooms to let:

North Wales Hotels

Between 6 and 8 letting rooms - 0 Hotels

Between 9 and 12 letting rooms - 3 Hotels

13 + letting rooms - 10 Hotels (ranging from 15 to 98 bedrooms)

Mid Wales Hotels

Between 6 and 8 letting rooms - 1 Hotel

Between 9 and 12 letting rooms - 1 Hotel

13 + letting rooms - 7 Hotels (ranging from 14 to 120 bedrooms)

South West Hotels

Between 6 and 8 letting rooms - 3 Hotels

Between 9 and 12 letting rooms - 3 Hotels

13 + letting rooms - 7 Hotels (ranging from 15 to 52 bedrooms)

South East Hotels

Between 6 and 8 letting rooms - 0 Hotels

Between 9 and 12 letting rooms - 1 Hotel

13 + letting rooms - 2 Hotels (one - 21 bedrooms, other- 25)

Area response by harmonised scheme Star rating achieved:

Location	Base	Harmonised Star rating achieved					No grade
		5 star	4 star	3 star	2 star	1 star	
	38	-	2	24	11	-	1
		-	6%	63%	29%	-	2%
North Wales	13	-	2	5	6	-	-
Mid Wales	9	-	-	8	1	-	-
South West W	13	-	-	9	3	-	1
South East W	3	-	-	2	1	-	-

The majority responding to the survey are those with 3 Stars, followed by 2 Star establishments. No Hotelier with 5 Stars or 1 Star has participated in this survey.

Response by Designator (descriptive sub category):

14(37%) of the 38 have "Hotel" as a Designator; 7(18%) have "Small Hotel"; 10 (27%) have "Country House Hotel"; and 7(18%) have "Metro Hotel". There were no responders with Town House Hotel or Budget Hotel designator.

MAIN FINDINGS

Grading - its benefits and operational issues

Visit Wales first wanted to establish the degree to which having property graded impacted on the level of business achieved by operators, according to the Star rating the property had been given under the harmonised scheme. It asked operators to rate grading benefits from a choice of three options - marketing opportunities, consumer awareness/use of grading or investment encouragement. (Tables 1 & 2)

- 14(37%) Hotels said being graded benefited them a great deal, with 16 (42%) replying "a little" (these results not tabled)
- The main benefit for these 30, either "a lot" or "to some extent", is being able to access marketing opportunities open only to those participating in grading (77%)

Table 1- Rating of grading benefits *by Star rating- Hotels*

		Base	Quality Grade achieved					1 star	Not yet graded
			5 star	4 star	3 star	2 star			
Base		30	-	2	21	6	-	1	
			-	7.00%	70.00%	20.00%	-	3.00%	
Consumer awareness and use of the scheme	A lot	8 27.0%		2 100%	6 29.0%	-	-	-	
						-	-	-	
	To some extent	11 37.0%	-	-	9 43.0%	2 33.0%	-	-	
							-	-	
	A little	10 33.0%	-	-	5 24.0%	4 67.0%	-	1 100.0%	
	Don't know	1 3.0%	-	-	1 5.0%	-	-	-	
Being able to market your property via Visit Wales, your local council and/or other marketing organisations which only feature graded properties	A lot	6 20.0%		1 50.0%	4 19.0%	1 17.0%	-	-	
							-	-	
	To some extent	17 57.0%	-	1 50.0%	12 57.0%	4 67.0%	-	-	
							-	-	
	A little	7 23.0%	-	-	5 24.0%	1 17.0%	-	1 100.0%	
	Don't know	-	-	-	-	-	-	-	
Owners receiving encouragement to make investments in quality as a result of the grading process	A lot	6 20.0%	-	1 50.0%	4 19.0%	1 17.0%	-	-	
							-	-	
	To some extent	13 44.0%	-	1 50.0%	9 43.0%	3 50.0%	-	-	
							-	-	
	A little	10 33.0%	-	-	7 34.0%	2 34.0%	-	1 100.0%	
	Don't know	1 3.0%	-	-	1 5.0%	-	-	-	

Table 1

Table 2- Rating of grading benefits *by area* – *Hotels*

		Base	North	Mid	South West	South East
		30	10	7	12	1
			34%	23%	40%	3.0%
Consumer awareness and use of the scheme	A lot	8 27.%	4 40%	2 29%	2 17%	- -
	To some extent	11 36%	4 40%	5 71%	2 17%	- -
	A little	10 34%	2 20%	- -	7 58%	1 100%
	Don't know	1 3.%	- -	- -	1 8%	- -
Being able to market your property via Visit Wales, your local council and/or other marketing organisations which only feature graded properties	A lot	6 20%	3 30%	2 29%	1 8%	- -
	To some extent	17 57%	5 50.%	3 42%	8 67%	1 100%
	A little	7 23%	2 20%	2 29%	3 25%	- -
	Don't know	-	-	-	-	-
Owners receiving encouragement to make investments in quality as a result of the grading process	A lot	6 20%	3 30%	3 42%	- -	- -
	To some extent	13 43%	4 40%	1 14%	7 58%	1 100%
	A little	10 33%	3 30.%	2 29%	5 42%	- -
	Don't know	1 3.%	- -	1 14%	- -	- -

Table 2

Operational issues

The frequency of visit (annual) is confirmed by 29(76%) as being right, 22 (58%) felt the lead in time given to prepare for the harmonised scheme was adequate and 95% say that they have prepared a disability Access Statement.

Responders were also asked to rate their views on the necessity for Quality Assessors to stay overnight to test the Hotel services. Visit Wales wants to know if it worthwhile carrying out assessments using this method or whether its effectiveness is diminished if the Assessor is known or can be detected. Likewise views were sought to see if operators preferred the current method of supplying Visit Wales with a voucher, in addition to the annual grading fee, to cover the cost of the Assessor's overnight stay or whether they would rather pay out more upfront for grading and then charge the assessor for his/her stay as any other guest. Note: overnight stays are not done every year, the general policy being that the Assessor will stay once every three years and undertake a day grading in the interim. There are a few variations to this but this affects those with 4 or 5 Star ratings. The majority of hotel responders to this survey have 3 Stars and so receive the 1 in every 3 years overnight stay.

Table 3 shows that the majority of hoteliers are in favour of overnight stays and even knowing the Assessor does not invalidate this operational approach. However, of the 11 that disagree with the first proposition (that it is essential to stay), 8 of these were located in the South West of Wales and they make up 62% from SW Wales responding to this survey. Proportionately, the strongest support for overnight stays came from Mid Wales (7 out of 9), followed by North Wales (7 out of 13).

The voucher system to allow the Assessor to experience the services of the hotel has been used by since grading began with the Wales Tourist Board. An agreement reached with Customs and Excise on voucher use meant that the hotelier would not be expected to pay VAT on this particular stay.

As with responses in Table 3, the second question in Table 4 was asked to confirm responses given by the first. The majority – 31(82%) agree or strongly agree that providing a voucher for Visit Wales' use is preferable to paying more in fees for the grading. Proportionately North Wales' hoteliers either agreed or strongly agreed with the voucher system (12 out of 13- 92%), followed by Mid Wales (7 out of 9 - 78%) and South West Wales (10 out of 13 – 77%)

Table 3 Response to Assessors periodically staying overnight for grading purposes

		Base
		38
It is essential for inspectors to stay overnight in order to test the services on offer	Strongly agree	16 42.0%
	Agree	11 29.0%
	Disagree	11 29.0%
I tend to know who the inspector is so it's a pointless exercise	Strongly agree	4 11.0%
	Agree	9 23.0%
	Disagree	20 53.0%
	Strongly Disagree	3 8.0%
	Don't know	2 5.0%

Table 3

Table 4 Response to Use of Voucher to pay for overnight grading

Base 38		
I am happy to provide a voucher so that I pay less for my grading by Visit Wales	Strongly agree	12 32.0%
	Agree	19 50.0%
	Disagree	4 11.0%
	Strongly Disagree	1 2.0%
	Don't know	2 5.0%

Base 38		
I don't like the voucher system as it robs me of revenue. I would rather pay more for grading each year and then charge the inspector as normal	Strongly agree	2 5.0%
	Agree	4 11.0%
	Disagree	18 47.0%
	Strongly Disagree	11 29.0%
	Don't know	3 8.0%

Table 4

HARMONISATION –views and outcomes

36 (95%) hoteliers say that they have been graded under the harmonised scheme. 29 (81%) of these supported the idea of having the grading scheme harmonised across Britain for the sake of the consumer and said it was a good thing. Having had their grading, just over half of them – 16(55%) still felt the same about harmonisation, and another 8(28%) of them now felt that it was neither good nor bad. See Table 5

Table 5 – Comparison of views on harmonisation from consumer viewpoint, with its impact on business

		Base	Now that you know the outcome of harmonisation for your own business – do you think harmonisation is:			
			A good thing	Neither good or bad	A bad thing	Don't know
Base		36	17 47%	10 28%	8 22%	1 3%
From the consumers perspective, do you think that the principle of harmonised grading across Britain is:-	A good thing	29 81%	16 94%	8 80%	4 50%	1 100%
	Neither good or bad	1 3%	-	-	1 13%	-
	A bad thing	5 14%	-	2 20%	3 38%	-
	Don't know	1 3%	1 6%	-	-	-
			-	-	-	-

Table 5

Change of Star rating under harmonised scheme

Of the 6 who achieved 4 Star Hotels under non-harmonised grading, 5 of them achieved 3 Stars under the harmonised scheme. 1 hotel only retained the 4 Star rating. Of the 22 hotels getting 3 Stars previously, 19 retained the same rating under harmonisation. Table 6 refers.

Table 6 – Illustration of change of Star rating after harmonisation

Base	Base	Grade achieved <i>before</i> harmonisation					No grade
		5 star	4 star	3 star	2 star	1 star	
	38	-	6	22	8	1	1
		-	15%	58%	21%	3%	3%
Star rating achieved under harmonised scheme	5 star	-	-	-	-	-	-
	4 star	2	-	1	1	-	-
		5%	-	16%	5%	-	-
	3 star	24	-	5	19	-	-
		63%	-	84%	86%	-	-
	2 star	11	-	-	2	7	1
	29%	-	-	9%	88%	100%	100%
1 star	-	-	-	-	-	-	-
No grade	1	-	-	-	1	-	-
	3%	-	-	-	12%	-	-

Grading expectations and outcomes

When asked to consider the harmonised scheme rating given against what they expected it to be, 73% (27) reported that their hotel got the Star rating they expected to get. None had a Star rating higher than anticipated; four 3 Star and four 2 Star hotels said their rating was lower than they had anticipated. See Table 7

Table 7 – Harmonised grading outcomes and expectation levels analysed by Star rating

Base	Base	Quality Grade achieved					Not graded
		5 star	4 star	3 star	2 star	1 star	
	36	-	2	23	10	-	1
		-	6%	64%	27%	-	3%
Thinking about the new harmonised quality grading scheme – was the grade you achieved:	Higher than anticipated	-	-	-	-	-	-
	As expected	27	-	2	19	6	-
		73%	-	100%	83%	60%	-
	Lower than anticipated	9	-	-	4	4	-
	25%	-	-	17%	40%	-	1
Had no expectations	-	-	-	-	-	-	-

Issues of concern and changes requested following introduction of harmonisation schemes

Since the introduction of the harmonised scheme for serviced accommodation, certain matters have been raised by the sector regarding certain issues that were not concerns under the non harmonised scheme. Visit Wales listed these and asked for feedback to ascertain how strongly operators felt about each issue. See Table 8 for breakdown of results by Star rating. When invited to give free text comments on things (non environmental) that hoteliers would like to see changed in the way that the harmonised scheme is operated across Britain, many of the comments made relate to these very issues. An overview of Table 8 findings is given here after each topic, followed by a selection of comments made on what hoteliers feel strongly about:

1 “Using Stars to quality grade all types of serviced accommodation makes perfect sense” (Background – before harmonisation, the AA used Stars to grade hotels but used the Diamond symbol to grade Guest Accommodation. Wales Tourist Board used Stars for both Hotels and non hotels”)

26 (68%) of hotels responding agree or strongly agree that using Stars for all types of serviced accommodation makes sense

2. “Small Hotels (including small private hotels) should be inspected using the same criteria as larger, more public hotels” (Background – small hotels are personally run by the owner and have up to 20 bedrooms and under the Hotel sector are expected to provide the same services such as room service, same staffing levels, as larger hotels)

21 (56%) agree or strongly agree with the above statement. 17 (45%) do not.

3.” Designators such as Town House, B&B etc are useful because they tell the customer what style of accommodation being offered.”

26 (69%) agree or strongly agree with the usefulness of such specifically worded and meaningful designators.

4. “The Designator “Guest Accommodation” can confuse the consumer as to the style of accommodation being offered”.

30 Hotels (79%) agree or strongly agree with this statement. Unlike any of the other designators, this one does not suggest the type of accommodation as it is too general as a sub category.

5. “Restaurant with Rooms should be inspected using the same standards as for hotels” (Background- these are graded under the Guest Accommodation harmonised scheme and some feel that it is perhaps easier for them to attain a

higher Star rating this way and would prefer them to be assessed using Hotel standards)

27 Hotels (71%) agree or strongly agree.

6. "Inns should be inspected using the same standards as for Hotels" (Background –these too are graded under the harmonised Guest Accommodation scheme as are Restaurants with Rooms)

27 Hotels (71%) agree or strongly agree. 20 of these also form part of the 27 that agree with the previous statement about Restaurant with Rooms

7. "Businesses should be allowed to choose their designator which gets them the highest Star rating."

21 (55%) agree or strongly agree. 14 (37%) disagree with this

8. "Visit Wales should take immediate action against businesses that habitually misrepresent their rating to the public"

34 (90%) of Hotels agreed or strongly agreed with this. 25 of the 34 (74%) agreed strongly. Of all the questions posed in this section of the survey, this is the largest number strongly agreeing with the statement.

9. "Hotels should be permitted to carry on using "Hotel" as part of their business name even if they choose the designator "Guest Accommodation"

25 (66%) Hotels disagreed or strongly disagreed.

We can conclude from the above that the views of the majority of hoteliers on symbols, descriptors and appropriate scheme allocation are that:

- Using Stars for all types of serviced accommodation was the correct decision taken as a consequence of harmonisation but that not all types of serviced accommodation is currently inspected under the most appropriate section of the harmonised serviced scheme.
- Just of over half confirm that Small hotels are correctly allocated to the Hotel standards for their grading
- The hoteliers' views on Designators indicate that their value lays in their usefulness to the consumer so the Designator "Guest Accommodation" in their opinion, does not add that value.

- The majority of hoteliers think that Restaurants and Inns with bedrooms to let need to be moved from the Guest Accommodation scheme and graded according to Hotel standards;
- While negotiating terms on harmonisation with other Tourist Boards, the then Wales Tourist Board argued to retain its stance that establishments with “Hotel” in their trading name should be graded as such since to do otherwise would mislead the public and if they were not agreeable to this, they would need to drop the word from their business name in order to be assessed as Guest Accommodation. The majority of hoteliers here ratify that approach, agreeing that they should not have the “best of both worlds”.
- Over half however feel that serviced accommodation operators should be able to choose the designator that gets their business the highest Star rating.

When given the opportunity to write freely on any aspect of the scheme that they would like to see changed, 26 (69%) of hoteliers took up the opportunity.

- One of the most frequently mentioned issue related to the need to prioritise hotels on the Visit Wales website (before Guest Accommodation) and also its brochures (5 mentions). This is one matter that Visit Wales had not considered to be an issued when compiling the survey. One hotelier said:

“Hotels being prioritised higher than guest houses- as have to have more criteria, higher overheads on renewals. You highlight Star grade and not the accommodation offered i.e. \hotel. In brochure all hotels should be at the front not mingled in with guest houses as we have had to go down or stay the same grade and guest houses all gone up a grade – the star grading a lot bigger than the logo with hotel on – very misleading and was very disappointed with Pembrokeshire guide this year!!”

And:

“Fed up of guest houses, metro hotels, B&B’s etc appearing higher in (mostly website) lists than 3 star hotels - I am aware of former star hotels becoming 4 or even 5 star accommodation providers, using “Guest accommodation” or “Metro hotels (in Tenby !), & then appearing higher in lists & being paraded as 4 or 5 star accommodation. This is wrong, misleading to the customer & demoralising to the trade. Need to rethink how designators are used.”

Another said:

“The Visit Wales brochure is a complete miss mash of accommodation entries. It has no order to it and completely confuses the customer trying to understand the difference between the types of accommodation offered (e.g. a 5 star farmhouse can be next to a 3 star hotel and it is difficult to see why they should pay more for 3 Star than 5 Star as the differences are not made clear”.

And

“Fed up of seeing lists arranged by stars, so 5 Star Guest House (possibly with only two rooms) can be way ahead of three star Hotel, even though the respective criteria are markedly different. So, lists, schedules, directories etc. should all be by designator first. The consumer is being duped, the operator frustrated”

- The issue that attracted the strongest agreement (25 – 66%) of all those listed was that Visit Wales needs to take immediate action against business that habitually misrepresent their rating to the public.

Comments made on this issue include:

“Grading- totally unfair, policing of grading scheme totally inadequate. Advertising of hotel on own website, and just being a B&B”

“Correct use of designators Not allowing former hotels to grade as B&Bs to increase stars without changing their names.”

“Consistency between the AA & Visit Wales over criteria, and to see inspectors deal with misuse of names e.g. a B & B/Guest House still calling itself a hotel on external signage, literature and web site. If the criteria are clear then inspecting organisations should enforce these rules.”

Table 8 Views on areas of concern already by the industry, by Star rating

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5.00%	63.00%	29.00%	-	3.00%	
Using stars to quality grade all types of serviced accommodation makes perfect sense	Strongly agree	8 21.0%	- 100.0%	2 16.0%	4 18.0%	2 -	- -	
	Agree	18 47.0%	- -	- 42.0%	10 73.0%	8 -	- -	
	Disagree	4 10.0%	- -	- 13.0%	3 -	- -	- 100.0%	
	Strongly disagree	7 19.0%	- -	- 25.0%	6 9.0%	1 -	- -	
	Don't know	1 3.0%	- -	- 4.0%	1 -	- -	- -	

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5.00%	63.00%	29.00%	-	3.00%	
Small hotels (including small private hotels) should be inspected using the same criteria as larger, more public hotels	Strongly agree	9 24.0%	- 50.0%	1 21.0%	5 27.0%	3 -	- -	
	Agree	12 32.0%	- -	- 42.0%	10 18.0%	2 -	- -	
	Disagree	4 10.0%	- -	- 13.0%	3 9.0%	1 -	- -	
	Strongly disagree	13 34.0%	- 50.0%	1 25.0%	6 46.0%	5 -	- 100.0%	
	Don't know	-	-	-	-	-	-	

Table 8 continued

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5.00%	63.00%	29.00%	-	3.00%	
Designators such as Town House, B&B etc are useful because they tell the customer what style of accommodation to expect	Strongly agree	6	1	5	-	-	-	
		16.0%	50.0%	21.0%	-	-	-	
	Agree	20	1	10	8	-	1	
		53.0%	50.0%	42.0%	73.0%	-	100.0%	
	Disagree	4	-	3	1	-	-	
		10.0%	-	13.0%	9.0%	-	-	
Strongly disagree	6	-	4	2	-	-		
	16.0%	-	16.0%	18.0%	-	-		
Don't know	2	-	2	-	-	-		
	5.0%	-	8.0%	-	-	-		

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5%	63%	29%	-	3%	
The designator "Guest Accommodation" can confuse the consumer as to the style of accommodation being offered	Strongly agree	12	-	10	2	-	-	
		32%	-	42%	18%	-	-	
	Agree	18	2	9	7	-	-	
		47%	100%	38%	67%	-	-	
	Disagree	1	-	1	-	-	-	
		3%	-	4%	-	-	-	
Strongly disagree	5	-	3	1	-	1		
	13%	-	13%	9%	-	100%		
Don't know	2	-	1	1	-	-		
	5%	-	4%	9%	-	-		

Table 8 continued

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5%	63%	29%	-	3%	
Restaurant with Rooms should be inspected using the same standards as for Hotels	Strongly agree	13	-	8	4	-	-	
		34%	-	35%	37%	-	-	
	Agree	16	-	10	3	-	1	
		42%	-	100%	42%	27%	-	100%
	Disagree	6	-	2	4	-	-	
		16%	-	8%	37%	-	-	
Strongly disagree	2	-	2	-	-	-		
	5%	-	8%	-	-	-		
Don't know	1	-	1	-	-	-		
	3%	-	4%	-	-	-		

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5%	63%	29%	-	3%	
Inns should be inspected using the same standards as for Hotels	Strongly agree	10	-	7	2	-	-	
		26%	-	30%	18%	-	-	
	Agree	18	-	11	4	-	1	
		47%	-	100%	46%	37%	-	100%
	Disagree	6	-	2	4	-	-	
		16%	-	8%	37%	-	-	
Strongly disagree	2	-	2	-	-	-		
	5%	-	8%	-	-	-		
Don't know	3	-	2	1	-	-		
	8%	-	8%	9%	-	-		

Table 8 continued

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5%	63%	29%	-	3%	
Businesses should be allowed to choose their designator which gets them the highest Star rating	Strongly agree	7	-	5	1	-	1	
		19%	-	21%	9%	-	100%	
	Agree	14	-	7	7	-	-	
		37%	-	29%	64%	-	-	
	Disagree	9	-	6	2	-	-	
		24%	-	50%	25%	18%	-	
	Strongly disagree	5	-	3	1	-	-	
		13%	-	50%	13%	9%	-	
	Don't know	3	-	3	-	-	-	
		8%	-	13%	-	-	-	

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5%	63%	29%	-	3%	
Visit Wales should take immediate action against businesses that habitually misrepresent their rating in public	Strongly agree	25	-	16	7	-	-	
		66%	-	100%	67%	64%	-	
	Agree	9	-	6	3	-	-	
		23%	-	25%	27%	-	-	
	Disagree	1	-	-	1	-	-	
		3%	-	-	9%	-	-	
	Strongly disagree	1	-	1	-	-	-	
		3%	-	4%	-	-	-	
	Don't know	2	-	1	-	-	1	
		5%	-	4%	-	-	100%	

Table 8 continued

Base	Base	Quality Grade achieved					1 star	Not graded
		5 star	4 star	3 star	2 star			
	38	-	2	24	11	-	1	
		-	5.00%	63.00%	29.00%	-	3.00%	
Hotels should be permitted to carry on using "Hotel" as part of their business name even if they choose the designator "Guest Accommodation"	Strongly agree	9	-	-	3	5	-	
		24.0%	-	-	13.0%	46.0%	-	
	Agree	4	-	-	3	1	-	
		10.0%	-	-	13.0%	9.0%	-	
	Disagree	5	-	-	3	2	-	
		13.0%	-	-	13.0%	18.0%	-	
Strongly disagree	20	-	2	14	3	-	1	
	53.0%	-	100.0%	58.0%	27.0%	-	100.0%	
Don't know	1	-	-	1	-	-	-	
	3.0%	-	-	4.0%	-	-	-	

Table 8

ENVIRONMENTAL ISSUES AND HARMONISATION

The harmonised grading scheme at present does not incorporate environmental good practice into the assessment for a Star grading.

Visit Wales sought hoteliers' views by first asking about how important it is to them that they operate their business in a sustainable way:

- 34 (90%) considered this to be very or quite important.

When asked to consider whether the harmonised scheme took sufficient notice of environmental good practice, 8 (21%) thought it did so, 14 (37%) said that it did not, and 16 (42%) said that they did not know.

The 37 % (14) were invited to say what they would like to see changed, listing three things, so that the scheme addressed this issue and 11 commented –

“ Impact on laundry services, heating and lighting requirements, towel rotation etc is extremely harmful to the environment, however the grading leaves very little room for compromise in these areas and pretty much says forget the environment and wash and change everything every day *, leave all lights on and keep the heating running all year.”

20 Visit Wales accepts at 1 Star level, an advertised establishment policy of guests' electing a less frequent change of towels.

“1. Commitment / signed up to Green Awards, e.g. Green Dragon 2. An understanding of & demonstration to customers of transport alternatives to the car. 3. Not having lit up VW signage”

“Minimum of Green Dragon Level One should be compulsory”

“ Being able to use smaller napkins without being down marked, as this cuts paper waste. Not supplying hot water with tea unless requested.”

“I don't think the grading issue is really connected to the environment – that should be tackled at a different level. Active recycling Energy efficiency measures, an environmental policy that is operated and monitored effectively”

“Commitment to national standards, e. g. Green Dragon Additional, new marketing opportunities for Green practising organisations Additional emphasis in web and guide publications for Green businesses to stand out”

“Could start with fairly simple and inexpensive requirements, such as; low energy lamps throughout hotel, both internally and externally. Re-cycling bottles and glass. Environmental notice in bathrooms for replacement of bath towels by request.”

“Energy saving ideas in the past in my opinion has always seemed to slightly “cheapen” the product i.e. light bulbs, lights on timers and lights on sensors for corridors. Now with the current issues with the environment and economy one of my questions would be- would a bedroom corridor lighting system on sensors detract from the experience of a 4 star Country House Hotel or would it be reviewed as responsible management of the building ?These are issues where a lead needs to be taken by Visit Wales”

“1.The use of energy light bulbs been subsidised to change over to them 2. Recycling in general.”

“Minimum criteria for recycling i.e. glass, cardboard etc”

-

With so few comments received, and 4 of the 11 mentioning Green Dragon Award, it is not possible for Visit Wales to get a steer just from these views until they seen in context with those from the Guest Accommodation sector.

Future Intentions

Visit Wales sought to gauge the overall mood of the hoteliers by asking them about their intentions regarding staying or leaving the Visit Wales grading scheme over the next two years, and if they said that they intended to leave, to say why.

Table 9 Future Intentions regarding grading participation by Star rating

		Future Intentions regarding grading scheme participation		
		Base	As a business I am thinking of remaining within the Visit Wales grading scheme for the foreseeable future.	I am considering ceasing my participation in the grading scheme.
		38	25	13
	5 star		-	-
	4 star	2	2	-
Quality	3 star	24	15	9
Grade	2 star	11	8	3
achieved	1 star	-	-	-
	Not yet quality graded	1	-	1

Table 9

The majority – 25 (66%) are intending to remain in the Visit Wales grading scheme although two said they were going to remain because of the grading policy on access to marketing.

Reasons given by the 13(34%) for planning to leave include:

- Grading is unfair to hotels – “the fact that a small hotel is graded in the same way as a 200 bed monster means that many small hotels simply cannot afford to take the risk and remain graded” and “If an alternative fairer scheme were available then we would look at that – Visit Wales could end up with a lot of guest accommodation and B&Bs on their books, even though a lot of them will have been called hotels in the past, this in order to get higher grading.”
- Customers looking at prices not Stars - “There doesn’t seem to be enough knowledge in the customers to differentiate between graded or not, they all seem to be looking for the best price, not the stars, even when you have invested in the business to improve, the current economic climate will not allow full realisation of room rate!”
- Can be graded by the AA for its profile – “why should I spend large money on AA and VW schemes, when one would suffice?” and “Because I value my grading with the AA more, because the grading of food by the AA is more important and because I am paying two sets of grading fees!” and “The Consumer does not recognise the different agents national tourist boards, the AA is higher profile.”
- Unhappy with using Stars for both types of serviced accommodation – “Unfair and uncontrolled use of stars” and “If Guest Accommodation is not changed to another symbol then as Hotels we are fighting a losing battle as regards Star grading.”
- No bookings – “I’m not just considering it, I have ceased my participation, in one year with the scheme I did not receive one enquiry via visitwales”
- Percentage results not published – “Without a percentage grading to go along side the star status we are not sure that it will be worth while staying with Visit Wales.”
- Low Star rating – “A two star grading is a mixed message. Not high enough to advertise, but implies high services.”

Dividing page

Dividing page



GUEST ACCOMMODATION REPORT

Contents of Tables - *Guest Accommodation*

Table 1 – Rating of grading benefits by <i>Star rating</i>	Page 32
Table 2 – Rating of grading benefits <i>by area</i>	Page 33
Table 3 – Responses to Assessors periodically staying overnight <i>by Stars</i>	Page 35
Table 4 – Response to Assessors staying periodically overnight <i>by area</i>	Page 36
Table 5 - Response to use of Voucher to pay for overnight stay <i>by Star rating</i>	Page 37
Table 6 - Response to use of Voucher to pay for overnight stay <i>by area</i>	Page 38
Table 7 – Comparison of views on harmonisation from consumers' viewpoint, With its impact on their business	Page 39
Table 8 - Illustration of change of Star rating following harmonisation	Page 40
Table 9 – Views on areas of concern already voiced by the industry, by Star rating	Page 40
Pie Chart – grading outcome and expectations	Page 41
Table 10 – Industry views on areas of concern that they have already raised	Page 45
Table 11 – Future intentions on continued participation in Visit Wales grading, by Star rating	Page 53

Responses received

224 out of 1104 Guest Accommodation sector graded operators contacted completed the survey, making a 20% response rate for this sector.

Responses analysed by area

85 (38%) North Wales 68 (30%) South West Wales
45 (20%) Mid Wales 26 (12%) South East Wales

Area responses by harmonised scheme rating achieved

Area	Base	5 Stars	4 Stars	3 Stars	2 Stars	1 Star	Not graded
	224	22	123	66	11	1	1
North Wales	85	10	43	30	2	-	
Mid Wales	46	5	24	13	3	-	1
South West Wales	67	5	44	14	3	1	
South East Wales	26	2	12	9	3	-	

Responses by Designator

44(20%) of the 224 have “Guest Accommodation” as a Designator, 91(40%) have “Bed and Breakfast”; 26(12%) have “Farmhouse”; 53 (24%) have “Guest House”; 5(2%) have Restaurant with Rooms” and 5 (2%) have “Inn”.

MAIN FINDINGS

Grading – its benefits and operational issues

Visit Wales first wanted to establish the degree to which having property graded impacted on the level of business achieved by operators, according to the Star rating the property had been given under the harmonised scheme. It asked operators to rate grading benefits from a choice of three options – marketing opportunities, consumer awareness/use of grading or investment encouragement.

Table 1 Rating of grading benefits by *Star rating- Guest Accommodation*

		Base	Harmonised rating achieved				
			5 star	4 star	3 star	2 star	1 star
Base		174	22	103	44	5	-
			13.0%	59.0%	25.0%	3.0%	-
Consumer awareness and use of the scheme	A lot	55	13	27	12	3	-
		32.0%	59.0%	26.0%	27.0%	60.0%	-
	To some extent	81	8	50	21	2	-
		46.0%	37.0%	49.0%	48.0%	40.0%	-
	A little	33	1	23	9	-	-
		19.0%	5.0%	22.0%	21.0%	-	-
	Don't know	5	-	3	2	-	-
		3.0%	-	3.0%	5.0%	-	-
Being able to market the property via Visit Wales, your local council and/or other marketing organisations that only feature graded properties	A lot	71	14	38	18	1	-
		41.0%	64.0%	37.0%	41.0%	20.0%	-
	To some extent	69	6	43	16	4	-
		40.0%	27.0%	42.0%	36.0%	80.0%	-
	A little	31	2	22	7	-	-
		18.0%	9.0%	21.0%	16.0%	-	-
	Don't know	3	-	-	3	-	-
		2.0%	-	-	7.0%	-	-
Owners receiving encouragement to make investments in quality as a result of the grading process	A lot	29	3	21	5	-	-
		17.0%	14.0%	21.0%	12.0%	-	-
	To some extent	74	11	43	16	4	-
		43.0%	50.0%	42.0%	37.0%	80.0%	-
	A little	57	7	32	17	1	-
		33.0%	32.0%	31.0%	39.0%	20.0%	-
	Don't know	14	1	7	6	-	-

Table 1

Table 2 - Rating of grading benefits *by area- Guest Accommodation*

		Base	In which area of Wales is your business located?			
			North	Mid	South West	South East
Base		172	63 37%	34 20%	53 30%	22 13%
Consumer awareness and use of the scheme	A lot	55	19	9	19	8
			30%	27%	36%	37%
		32%	-	-	-	-
	To some extent	80	30	17	22	11
			48%	50%	42%	50%
		46%	-	-	-	-
	A little	33	13	7	10	3
			21%	21%	19%	14%
		19%	-	-	-	-
	Don't know	4	1	1	2	-
			2%	3%	4%	-
		3%	-	-	-	-
Being able to market the property via Visit Wales, your local council and/or other marketing organisations that only feature graded properties	A lot	70	21	14	28	7
			33%	41%	53%	32%
		41%	-	-	-	-
	To some extent	68	28	10	18	12
			44%	29%	34%	55%
		39%	-	-	-	-
	A little	31	12	9	7	3
			19%	26%	13%	14%
		18%	-	-	-	-
	Don't know	3	2	1	-	-
			3%	3%	-	-
		2%	-	-	-	-
Owners receiving encouragement to make investments in quality as a result of the grading process	A lot	29	4	6	16	3
			6%	18%	30%	14%
		17%	-	-	-	-
	To some extent	74	33	12	16	13
			52%	35%	30%	59%
		43%	-	-	-	-
	A little	55	20	12	17	6
			32%	35%	32%	27%
		32%	-	-	-	-
	Don't know	14	6	4	4	-
			9%	12%	7%	-
		8%	-	-	-	-

Table 2

- 90 (40%) operators said that being graded benefited them a great deal, and a further 84(37%) replied that it benefited them “a little” (this result not tabled)
- The main benefit of grading amongst the 174 (78% of Guest Accommodation survey responders) in Table 1 is being able to access marketing opportunities open only to participants in the grading scheme. 71 (41%) said they benefited a lot from this, with a further 69 (40%) benefiting “to some extent”

Operational issues

The frequency of the grading visit (annual) is confirmed by 177(79%) as being right and 151 (68%) felt that the lead in time given to prepare for the introduction of the harmonised scheme was adequate. 211 (94%) confirm that they have prepared a disability Access Statement.

Responders were also asked to rate their views on the necessity for Quality Assessors to stay overnight to test the guest services. Visit Wales wants to know if it worthwhile carrying out assessments using this method or whether its effectiveness is diminished if the Assessor is known or can be detected. The second question sought to confirm the responses given in the first question. Likewise, views were sought to see if operators preferred the current method of supplying Visit Wales with a voucher, in addition to the annual grading fee, to cover the cost of the Assessor’s overnight stay or whether they would rather pay out more money upfront for grading and then charge the assessor for his/her stay as any other guest. Note: overnight stays are not done every year, the general policy being that the Assessor will stay once every three years and undertake a day grading in the interim. There are a few variations to this but this affects those with 4 or 5 Star ratings.

Tables 2 and 3 show that the majority- 154 (69%) are in favour of having the Assessor stay overnight at regular intervals and knowing the inspector does not invalidate this approach and whether these results are analysed by Star rating or area, this is confirmed with 125 (56%) either agreeing or agreeing strongly that overnight stays are essential.

On the matter of voucher provision, 150 (67%) agree or strongly agree that they are happy with this arrangement, with this being confirmed by the second question and 149 stating that they would not wish to pay more upfront for grading and then charging the Assessor for his/her stay in the usual way. These findings are confirmed when analysed by area and also by Star rating – see Tables 4 and 5.

Table 3 - Response to Assessors staying periodically overnight by Star rating

		Base	Quality Grade achieved					Not graded
			5 star	4 star	3 star	2 star	1 star	
Base		224	22 10.0%	123 55.0%	66 29.0%	11 5.0%	1 0.4%	1 0.4%
It is essential for inspectors to stay overnight in order to test the services on offer	Strongly agree	54 24.0%	12 55.0%	33 27.0%	8 12.0%	1 9.0%	-	-
	Agree	100 45.0%	5 23.0%	54 43.0%	33 50.0%	8 73.0%	-	-
	Disagree	51 23.0%	3 14.0%	31 25.0%	14 21.0%	2 18.0%	-	1 100.0%
	Strongly Disagree	11 5.0%	1 5.0%	3 3.0%	7 11.0%	-	-	-
	Don't know	8 3.0%	1 5.0%	2 2.0%	4 6.0%	-	1 100.0%	-
I tend to know who the inspector is so it's a pointless exercise	Strongly agree	26 12.0%	3 14.0%	13 10.0%	8 12.0%	2 18.0%	-	-
	Agree	61 27.0%	5 23.0%	35 28.0%	18 27.0%	3 27.0%	-	-
	Disagree	102 46.0%	13 59.0%	56 45.0%	30 46.0%	2 18.0%	-	1 100.0%
	Strongly Disagree	23 10.0%	-	17 14.0%	5 8.0%	1 9.0%	-	-
	Don't know	12 5.0%	1 5.0%	2 2.0%	5 8.0%	3 27.0%	1 100.0%	-

Table 3

Table 4 - Response to Assessors staying periodically overnight *by area*

		Base	Business area			
			North	Mid	South West	South East
Base		224	85	46	67	26
			38.0%	20.0%	30.0%	12.0%
It is essential for inspectors to stay overnight in order to test the services on offer	Strongly agree	53 24.0%	18 22.0%	13 28.0%	18 27.0%	4 15.0%
	Agree	99 44.0%	36 43.0%	21 47.0%	27 40.0%	15 58.0%
	Disagree	51 23.0%	21 25.0%	10 22.0%	15 22.0%	5 19.0%
	Strongly Disagree	13 6.0%	9 11.0%	2 4.0%	2 3.0%	- -
	Don't know	8 3.0%	1 1.0%	- -	5 8.0%	2 8.0%
I tend to know who the inspector is so it's a pointless exercise	Strongly agree	26 12.0%	9 11.0%	6 13.0%	8 12.0%	3 12.0%
	Agree	61 27.0%	34 40.0%	12 26%	11 16.0%	4 16.0%
	Disagree	100 45.0%	28 33.0%	22 48.0%	34 51.0%	16 62.0%
	Strongly Disagree	23 10.0%	11 13.0%	2 4.0%	7 11.0%	3 12.0%
	Don't know	14 6.0%	3 3.0%	4 9.0%	7 10.0%	- -

Table 4

Table 5 - Response to Voucher use to pay for overnight stay *by Star rating*

		Base	Quality Grade achieved					Not graded
			5 star	4 star	3 star	2 star	1 star	
Base		224	22 10.0%	123 55.0%	66 29.0%	11 5.0%	1 0.4%	1 0.4%
I am happy to provide a voucher so that I pay less for my grading by Visit Wales	Strongly agree	29 13%	3 14%	16 13%	6 9%	3 27%	-	1 100.0%
	Agree	122 54%	12 55%	70 56%	35 53%	5 45%	-	-
	Disagree	27 12%	2 9.	15 12%	8 12%	2 18%	-	-
	Strongly Disagree	16 7%	3 14%	8 7%	4 6%	-	1 100.0%	-
	Don't know	32 14%	2 9%	16 13%	13 20%	1 9%	-	-
I don't like the voucher system as it robs me of revenue. I would rather pay more for grading each year and then charge the inspector as normal	Strongly agree	14 6%	2 9%	8 7%	4 6%	-	-	-
	Agree	29 13%	3 14%	14 11%	9 14%	3 27%	-	-
	Disagree	103 46%	9 41%	61 49%	29 43%	4 36%	-	-
	Strongly Disagree	48 21%	6 27%	26 21%	13 20%	2 18%	1 100%	-
	Don't know	32 14%	2 9%	16 13%	11 17%	2 18%	-	1 100%

Table 5

Table 6 - Response to Use of Voucher to pay for overnight stay *by area*

		Base	Business area			
			North	Mid	South West	South East
Base		224	85	46	67	26
			38.0%	20.0%	30.0%	12.0%
I am happy to provide a voucher so that I pay less for my grading by Visit Wales	Strongly agree	30 13.0%	8 10.0%	5 10.0%	13 19.0%	4 16.0%
	Agree	120 54.0%	44 52.0%	27 60.0%	34 50.0%	16 62.0%
	Disagree	26 12.0%	13 15.0%	5 11.0%	5 8.0%	3 12.0%
	Strongly disagree	16 7%	8 10%	3 7%	5 7%	-
	Don't know	32 14.0%	12 14.0%	6 13.0%	10 16.0%	3 12.0%
I don't like the voucher system as it robs me of revenue. I would rather pay more for grading each year and then charge the inspector as normal	Strongly agree	14 6.0%	8 10.0%	1 2.0%	3 4.0%	2 8.0%
	Agree	29 13.0%	13 15.0%	6 13.0%	5 8.0%	5 19.0%
	Disagree	102 46.0%	35 41.0%	21 47.0%	35 52.0%	11 42.0%
	Strongly Disagree	48 21.0%	15 18.0%	10 22.0%	19 28.0%	4 16.0%
	Don't know	31 14.0%	14 17.0%	8 17.0%	6 9.0%	4 16.0%

Table 6

HARMONISATION views and outcomes

201(90%) of Guest Accommodation responders say that they have been inspected under the harmonised scheme. Of these, 195 answered on the idea of harmonisation across Britain and 166 (86%) of them supported it as a good thing. 125 of these still thought harmonisation was a good idea after receiving their harmonised scheme result. Table 7 below refers.

Table 7 Comparison of views on harmonisation from consumers' viewpoint, with its impact on their business

		Base	Now that you know the outcome of harmonisation for your own business			
			A good thing	Neither good or bad	A bad thing	Don't know
Base		195	130	45	14	6
			66.00%	23.00%	7.00%	3.00%
From the consumers perspective, do you think that the principle of harmonised grading across Britain is:	A good thing	166	125	31	5	5
		86.00%	96.00%	69.00%	36.00%	84.00%
	Neither good or bad	24	5	14	5	-
		13.00%	4.00%	31.00%	36.00%	-
	A bad thing	4	-	-	4	-
		2.50%	-	-	29.00%	-
	Don't know	1	-	-	-	1
		0.50%	-	-	-	16.00%

Table 7

Change of Star rating under the harmonised scheme and expectations

Table 8 below shows rating changes following harmonisation; Guest Accommodation operators have seen an upward movement for 83 (37%) of the 224. Loss of rating has only happened to 3 operators. When asked about the harmonised scheme rating they achieved however, only 17 said the result was higher than they had anticipated. The majority- 157 (79% of base) got the result they expected. It appears that some - 22 (11%) had expected to achieve a higher rating than they were given.

Table 8 Illustration of change of Star rating following harmonisation

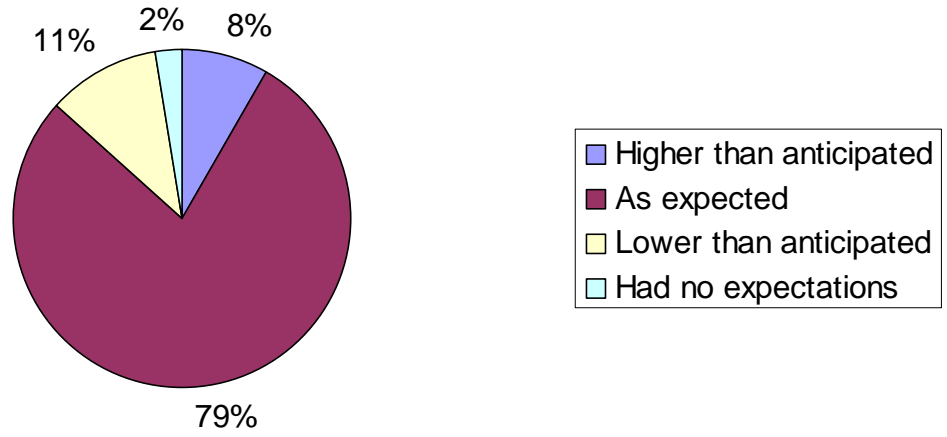
		Base	Harmonised Star rating					Not graded
			5 star	4 star	3 star	2 star	1 star	
Base		224	22 10.0%	123 55.0%	66 29.0%	11 5.0%	1 0.4%	1 0.4%
What quality grade did your business achieve BEFORE grading scheme harmonisation	5 star	10 4.4%	9 41.0%	1 0.8%	- -	- -	- -	- -
	4 star	63 28.0%	9 41.0%	54 44.0%	- -	- -	- -	- -
	3 star	112 49.8%	1 4.5%	56 45.0%	54 82.0%	1 9.0%	- -	- -
	2 star	20 8.9%	- -	3 3.0%	10 15.0%	5 46.0%	1 100.0%	1 100.0%
	1 star	4 1.8%	- -	- -	- -	4 37.0%	- -	- -
	Not graded	16 7.1%	3 14.0%	10 8.0%	2 3.0%	1 9.0%	- -	- -

Table 9 Harmonised grading outcomes and expectation levels by Star rating

		Base	Harmonised Rating achieved				
			5 star	4 star	3 star	2 star	1 star
Base		201	19 9.5%	113 56.0%	60 30.0%	9 4.5%	-
Was the harmonised scheme rating achieved.....	Higher than anticipated	17 8%	4 21.0%	90 8.0%	3 5.0%	1 11.0%	-
	As expected	157 79%	14 74.0%	93 82.0%	44 74.0%	6 67.0%	-
	Lower than anticipated	22 11%	1 6.0%	8 7.0%	11 18.0%	2 22.0%	-
	Had no expectations	5 2%	- -	3 3.0%	2 3.0%	- -	- -

Pie chart illustration of Table 9

Title: Thinking about the new harmonised quality grading scheme - was the grade you achieved:



Issues of concern and changes requested following introduction of harmonisation schemes

Since the introduction of the harmonised scheme for serviced accommodation, certain matters have been raised by the sector regarding certain issues that were not concerns under the non harmonised scheme. Visit Wales listed these and asked for feedback to ascertain how strongly operators felt about each issue. See Table 10 for breakdown of results by Star rating. When invited to give free text comments on things (non environmental) that hoteliers would like to see changed in the way that the harmonised scheme is operated across Britain, many of the comments made relate to these very issues. An overview of Table 10 findings is given here after each topic, followed by a selection of comments made on what hoteliers feel strongly about:

1 “Using Stars to quality grade all types of serviced accommodation makes perfect sense” (Background – before harmonisation, the AA used Stars to grade hotels but used the Diamond symbol to grade Guest Accommodation. Wales Tourist Board used Stars for both Hotels and non hotels”)

197 (89%) of Guest Accommodation responding agree or strongly agree that using Stars for all types of serviced accommodation makes sense

2. “Small Hotels (including small private hotels) should be inspected using the same criteria as larger, more public hotels” (Background – small hotels are personally run by the owner and have up to 20 bedrooms and under the Hotel sector are expected to provide the same services such as room service, same staffing levels, as larger hotels)

The majority -119 (54%) do *not* agree with this with 36 (16%) of these strongly disagreeing. 80(37%) agree or strongly agree with the above statement.

3.” Designators such as Town House, B&B etc are useful because they tell the customer what style of accommodation being offered.”

188 (85%) agree or strongly agree with the usefulness of such specifically worded and meaningful designators.

4. “The Designator “Guest Accommodation” can confuse the consumer as to the style of accommodation being offered”.

96 (44%) agree and 61 (28%) strongly agree with this statement. Unlike any of the other designators, this one does not suggest the type of accommodation as it is too general as a sub category. 45 (21%) disagree with this statement but 44 of them have “Guest Accommodation” as their own Designator. (16% - 173 of those graded By Visit Wales in this grading year have this Designator)

5. "Restaurant with Rooms should be inspected using the same standards as for hotels" (Background- these are graded under the Guest Accommodation harmonised scheme and some feel that it is perhaps easier for them to attain a higher Star rating this way and would prefer them to be assessed using Hotel standards)

144 (65%) agree or strongly agree. 26 (12%) say that they do not know. Only 5 have participated in this survey out of the 29 that have this particular Designator

6. "Inns should be inspected using the same standards as for Hotels" (Background –these too are graded under the harmonised Guest Accommodation scheme as are Restaurants with Rooms)

138(64%) agree or strongly agree. Only 5 (5%) have participated in the survey out of the 99 that have this designator.

7. "Businesses should be allowed to choose their designator which gets them the highest Star rating."

Of all questions asked in this section, there is almost an even *split* between those agreeing and disagreeing. 102(46%) agree or strongly agree. 96 (43%) disagree or strongly disagree with this.

8. "Visit Wales should take immediate action against businesses that habitually misrepresent their rating to the public"

There is 90% (202) agreement with this. 20 of the 202 (9%) agreed strongly. Of all the questions posed in this section of the survey, this is the *largest number* strongly agreeing with the statement.

9. "Hotels should be permitted to carry on using "Hotel" as part of their business name even if they choose the designator "Guest Accommodation"

109 (50%) disagreed or strongly disagreed with 50 (23%) showing strong disagreement. 70 (31%) however agreed or strongly agreed with the statement with a further 44 (19%) not expressing a view.

We can conclude that the views of the majority of Guest Accommodation operators on symbols, descriptors and appropriate scheme allocation are that:

- Using Stars for all types of serviced accommodation was the correct decision taken as a consequence of harmonisation (89%- 197) but that not all types of serviced accommodation are currently inspected under the most appropriate section of the harmonised serviced scheme.
- Unlike the hoteliers, Guest Accommodation operators do not feel that Small Hotels are correctly allocated to the Hotel standards for their grading. They presumably identify with the fact that Small Hotels are owner run like their own business.
- The GA operators' views on Designators indicate that their value lays in their usefulness to the consumer so for 157(72%) the Designator "Guest Accommodation", in their opinion, does not add that value.
- The majority- 144 (65%) of Guest Accommodation operators think that Restaurants and Inns with bedrooms to let need to be moved from the Guest Accommodation scheme and graded according to Hotel standards;
- With an almost even split amongst GA operators on being able to choose the designator that allows businesses to get the highest Star rating, they have provided no clear lead on this issue.
- Guest Accommodation operators are also split on the decision agreed under harmonisation that accommodation with "Hotel" in its trading name should be graded under Hotel standards.
(An establishment which has hotel in the name and wants to be assessed under Guest Accommodation criteria are allowed to keep their hotel sign until they can afford to change it and keep their domain name although they have to remove any mention of hotel from the preamble on their web page; they have to prominently show the Guest Accommodation Star plaque and also have to remove the word "hotel" from any literature- menus, headed paper, business cards etc)

Table 10- Views on areas of concern already voiced by the industry, by Star rating

	Base	Quality Grade achieved					1 star	Not yet quality graded	
		5 star	4 star	3 star	2 star				
Base	222	22 10.0%	123 56.0%	64 29.0%	11 5.0%	1 0.4%		1 0.4%	
Using stars to quality grade all types of serviced accommodation makes perfect sense	Strongly agree	77 35.0%	11 50.0%	47 39.0%	16 25.0%	3 28.0%	-	-	
	Agree	120 54.0%	11 50.0%	63 51.0%	38 60.0%	7 64.0%	-	1 100.0%	
	Disagree	17 8.0%	- -	8 7.0%	7 11.0%	1 9.0%	1 100.0%	-	
	Strongly disagree	5 2.0%	- -	3 3.0%	2 3.0%	- -	- -	-	
	Don't know	3 1.0%	- -	2 3.0%	1 2.0%	- -	- -	-	
Small hotels (including small private hotels) should be inspected using the same criteria as larger, more public hotels	Strongly agree	26 12.0%	8 38.0%	11 9.0%	7 11.0%	-	-	-	
	Agree	54 25.0%	5 24.0%	32 26.0%	17 27.0%	-	-	-	
	Disagree	83 38.0%	1 5.0%	50 40.0%	21 33.0%	9 82.0%	1 100.0%	1 100.0%	
	Strongly disagree	36 16.0%	5 24.0%	18 14.0%	13 21.0%	-	-	-	
	Don't know	21 9.0%	2 9.0%	12 11.0%	5 8.0%	2 18.0%	-	-	
Designators such as Town House, B and B etc are useful because they tell the customer what style of accommodation to expect	Strongly agree	59 27.0%	8 37.0%	35 29.0%	12 19.0%	4 37.0%	-	-	
	Agree	129 58.0%	10 46.0%	74 61.0%	37 59.0%	7 64.0%	1 100.0%	-	
	Disagree	15 7.0%	4 18.0%	5 4.0%	6 9.0%	-	-	-	
	Strongly disagree	12 6.0%	- -	5 4.0%	7 11.0%	-	-	-	

			-						
	Don't know	5	-	3	1	-	-		1
		2.0%	-	3.0%	2.0%	-	-		100.0%
			-			-	-		
The designator "Guest Accommodation" can confuse the consumer as to the style of accommodation being offered	Strongly agree	61	12	32	17	-	-		-
		28.0%	55.0%	26.0%	27.0%	-	-		-
	Agree	96	7	56	26	5	1		1
		44.0%	32.0%	46.0%	41.0%	46.0%	100.0%		100.0%
	Disagree	45	2	23	16	4	-		-
		21.0%	9.0%	19.0%	25.0%	37.0%	-		-
	Strongly disagree	8	-	5	3	-	-		-
		4.0%	-	4.0%	5.0%	-	-		-
			-			-	-		-
	Don't know	12	1	7	2	2	-		-
		6.0%	5.0%	6.0%	3.0%	18.0%	-		-
Restaurant with Rooms should be inspected using the same standards as for Hotels	Strongly agree	44	8	25	9	2	-		-
		20.0%	36.0%	20.0%	14.0%	18.0%	-		-
	Agree	100	5	63	25	6	-		1
		45.0%	23.0%	52.0%	39.0%	55.0%	-		100.0%
	Disagree	44	5	20	16	2	1		-
		20.0%	23.0%	17.0%	25.0%	18.0%	100.0%		-
	Strongly disagree	8	2	2	4	-	-		-
		4.0%	9.0%	2.0%	6.0%	-	-		-
	Don't know	26	2	13	10	1	-		-
		12.0%	9.0%	11.0%	16.0%	9.0%	-		-
Inns should be inspected using the same standards as for Hotels	Strongly agree	36	6	20	8	2	-		-
		17.0%	29.0%	17.0%	13.0%	18.0%	-		-
	Agree	102	5	63	28	5	-		1
		47.0%	24.0%	52.0%	46.0%	46.0%	-		100.0%
	Disagree	48	7	22	15	3	1		-
		22.0%	33.0%	18.0%	25.0%	27.0%	100.0%		-
	Strongly disagree	7	2	2	3	-	-		-
		3.0%	9.0%	2.0%	5.0%	-	-		-
	Don't know	23	1	14	7	1	-		-
		11.0%	5.0%	12.0%	12.0%	9.0%	-		-

Businesses should be allowed to choose their designator which gets them the highest star rating	Strongly agree	20 9.0%	2 9.0%	16 13.0%	2 3.0%	- -	- -	- -
	Agree	82 37.0%	6 29.0%	40 32.0%	29 45.0%	6 55.0%	- -	1 100.0%
	Disagree	72 32.0%	9 43.0%	42 34.0%	18 28.0%	3 27.0%	- -	- -
	Strongly disagree	24 11.0%	4 19.0%	11 9.0%	8 13.0%	1 9.0%	- -	- -
	Don't know	23 10.0%	- -	14 12.0%	7 11.0%	1 9.0%	1 100.0%	- -
Visit Wales should take immediate action against businesses who habitually misrepresent their rating in public	Strongly agree	142 63.0%	19 87.0%	82 66.0%	36 55.0%	5 46.0%	- -	- -
	Agree	60 27.0%	2 9.0%	32 26.0%	20 31.0%	4 37.0%	1 100.0%	1 100.0%
	Disagree	4 2.0%	- -	1 0.8%	2 3.0%	1 9.0%	- -	- -
	Strongly disagree	6 3.0%	1 5.0%	1 0.8%	4 6.0%	- -	- -	- -
	Don't know	11 6.0%	- -	7 7.0%	3 5.0%	1 9.0%	- -	- -
Hotels should be permitted to carry on using "Hotel" as part of their business name even if they choose the designator "Guest Accommodation"	Strongly agree	23 10.0%	2 9.0%	11 9.0%	10 15.0%	- -	- -	- -
	Agree	47 21.0%	3 14.0%	29 24.0%	12 19.0%	3 27.0%	- -	- -
	Disagree	59 27.0%	4 18.0%	33 27.0%	18 28.0%	4 36.0%	- -	- -
	Strongly disagree	50 23.0%	8 36.0%	30 24.0%	12 19.0%	- -	- -	- -
	Don't know	44 19.0%	5 23.0%	20 17.0%	13 20.0%	4 36.0%	1 100.0%	1 100.0%

Table 10

When given the opportunity to write freely on any aspect of the scheme that they would like to see changed, 78 (35%) took up the opportunity.

They fall broadly under the following headings:

- Too many Designators/remove "Guest Accommodation" designator (mentioned 5 times)
- Dispensations should be allowed for historic buildings (7)
- Request for the return of "Country House" designator (5)
- Recognition given by means of an award or similar for those scoring high percentages in their particular rating band/bandings too wide (2)
- Lack of washbasins in bedrooms should not preclude higher ratings (3)
- Need for more promotion of scheme differences(Hotel and GA) to the public((3)
- Inconsistent application on standards/personal views by VW Quality Assessors(9)
- Inconsistent application on standards across Britain (4)

Other matters raised included- make grading legal requirement to trade, police those still displaying out of date material e.g. Crowns. Welsh properties not appearing on Visit Britain website, scheme not taking enough account of personal service and too much emphasis on facilities.

A selection of comments:

On re introduction of Country House designator:

"I would like the country house grading returned so the smaller operators have some chance of competing in their original market"

And

,"Bring back country house award points for properties of historic interest, or award a special historic house mark that can be used for marketing a property."

On having less designators:

,"Less designators - guests don't know the difference between a 4 star hotel and 4 star guest accommodation for example and this can create disappointment for the guest and frustration for the owner. Force businesses to display only current grading signs, i.e. remove diamonds, crowns etc as not fair on those who have current grading and it only confuses the public. Involve trading standards as these businesses are misrepresenting themselves and should face penalties like everyone else. The AA is part of harmonisation so they should at least implement the ""Guest Accommodation"" category on its own website. At present we have to be listed as a ""B&B"" which we feel doesn't reflect our business - we are graded as Guest Accommodation."

and

,"More clarity between different types of accommodation - I know of one star country hotels that have chosen to reregister as Restaurant with rooms in order to obtain 4 stars"

On Dispensations:

,"Recognition that facilities are not the whole story and some buildings are not suitable for en-suite provision for example. Could be categories marked as ""of historic/special interest"", ""excellent food "" , ""quiet place "" etc perhaps? Don't try to make everywhere the same-in the B and B market people are sharing a family home and not a hotel, and providers should not be expected to provide hotel-type services e.g. TVs in every room."

,"A more relaxed attitude to fixtures and fittings - things are not always possible, in listed building for instance, and yet rooms can still be comfortable. Not such a "tick list" approach. Fish with breakfast when you are not on the coast doesn't make a B&B better! Recognition that B&Bs are always in people's homes - they are not trying to be hotels or guest houses."

And

"5 Star B&B's should not be given a lower score because they ask for breakfast orders the night before. We are still small business's this is to prevent wastage and higher costs".

On recognising top 10% of band:

,"Introduction of Highly Commended to top 10% of three, four and five star bands a la AA. Introduction of Breakfast and Dinner awards a la AA. Introduction of hospitality awards e.g. "Friendliest Landlady."

And

More 4 star establishments to be awarded 4 star gold (say top 10%)"

On getting higher grades:

,"Harmonisation resulted in a lot of properties in the higher 3 star band being brought in to the 4 star band. I believe that this misleads customers and also creates a sense of no need to do better in those proprietors."

On consistent approach pan Britain:

,"Having recently stayed at a 5 star guest house in Tunbridge Wells that was not up to the standard of 4 star B&B's in Wales I question whether harmonisation is working!"

On scheme promotion to the public:

,"Give better clarification for the client to understand the different types of premises and the relevant grading scheme. Also that the grading system should be a licence to trade as a that particular type of premises"

ENVIRONMENTAL ISSUES AND HARMONISATION

The harmonised grading scheme at present does not incorporate environmental good practice into the assessment for a Star grading.

Visit Wales sought hoteliers' views by first asking about how important it is to them that they operate their business in a sustainable way:

- 203(91%) considered this to be very or quite important.

When asked to consider whether the harmonised scheme took sufficient notice of environmental good practice, 49 (22%) thought it did so, 72 (32%) said that it did not, and but 103 (46%) said that they did not know.

The 72 (32%) were invited to say what they would like to see changed, listing three things, so that the scheme addressed this issue and 60 commented –

- Use of food locally sourced is mentioned 13 times
- Provision of recycling facilities for guests – 10 times
- Sort out conflict between grading criteria and sustainability – 11 mentions
- Promote or highlight those with “Green” awards – 4
- Make a Recycling Statement part of grading 2 mentions.

A selection of comments made on

Locally sourced food -

“I think more emphasis should be made of using local food stuffs and produce - and being able to prove that – i.e. informal traceability - our guests who have time on holidays are so interested and it is a great shop window to produce welsh foodstuffs”

And

“Use of local produce monitored”

“Notice taken of use of local produce; Notice taken of my efforts e.g. I make my own bread with flour from our local mill & serve jams, I make, using fruit from our orchard. Advice about local walks & transport”

Recycling facilities-

"Guest waste disposal system, I leave advice in room as to where disposal area is and hope that guests take advantage of it. I do feel it is intrusive to root through guest rubbish to separate each type of waste so just deal with major items like newspapers. A policy in house, i. use less water/electric etc (e.g. how to help us keep the planet safe) Assessors could use public transport system ho ho !"

Conflict resolution of grading criteria and “green” practices-

“Stop this ridiculous criteria of the more appliances and 'giveaways' in the rooms the more ticks in the boxes one gets, i.e. Tv’s, clock radios, cd/dvd players, large kettles, hairdryers; matching shower/shampoo and soaps that are disposable and not in reusable containers whereby the owner can top up the liquids from bulk purchases. You should be giving credit to those establishments that offer some of these items as 'on request' and not as standard and give credit to those who don't encourage extra packaging.”

"Replenishment of towels daily is an environmental killer. One night stays should be charged a premium for the excessive footprint the laundry services takes for a one night stay. Heating requirement times are too rigid and take no account of good seasonal weather, increasing the carbon footprint. Late night food service means high current kitchen equipment is on much longer than normal, creating more carbon emissions"

"Less emphasis on items such as packaged toiletries etc. which are wasteful in terms of packaging. Less emphasis on forever changing furnishings etc.-, again, wasteful."

,"The grading scheme emphasis on the appearance of furnishings, etc actively works against any environmentally friendly practices - for example, we are forced to use the harshest detergents for cleaning, if we are to keep our four stars, and we have been told to provide bottled water in bedrooms, when Llyn Cwellyn water is just as good. A whole category is needed for quality of recycling and reduction of landfill waste, minimising laundering (perhaps by using higher quality linen to enable less frequent changing), and conservation of water and power. The scheme should actively work towards making this an essential part of any grading."

“Several of the grading criteria encourage wilful waste of resources (e.g. disposables, lots of washing etc. If I don't use paper napkins and use cloth ones for breakfast as directed, I use so much more water/electricity etc)“

Green awards-

"Make the Green Dragon scheme part of the system. We were one of the first accommodation providers to be included in this scheme but withdrew because of cost and the amount of hoops we had to jump through"

,"Links into Green Dragon environmental award scheme. Benefits for those businesses achieving the Green Dragon award i.e. reduced costs for grading. Publication of businesses environmental policies"

Statements-

"Ask for a statement on recycling"

There are a minority however who express the following views:

"The grading system should not concern itself with such issues"; "What has the grading system got to do with a friendly environment?"; "I think this a totally personal thing and feel Visit Wales has no right to 'reward' Accommodation Providers if they follow environmentally friendly ways e.g. a lot of Accommodation Providers claim saving water as a reason not to provide clean towels to guests who stay longer than 1 night. We have made environmental changes i.e. light bulbs, energy saver plugs to name, there is no need for anyone to reward us in helping to save the environment." "I don't see why it should, you go into a 5 star hotel for the services they offer, not where they buy their electric. It would be impossible to police"

Future Intentions

To gauge the industry's mood about the future, they were asked to indicate if they were planning to remain in the Visit Wales grading scheme for the foreseeable future. If they were planning to leave, they were asked to explain their decision. The majority 164 – 73% intend to remain in the scheme for the next two to three years. See Table 9 for analysis according to Star rating.

Table 11 Future Intentions regarding grading participation, by Star rating

Future Intentions

	Base	Quality Grade achieved				
		5 star	4 star	3 star	2 star	1 star
	222	22	123	66	10	1
		10.0%	56.0%	29.0%	4.5%	0.4%
As a business I am thinking of remaining within the Visit Wales grading scheme for the foreseeable future.	164 73.00%	18	97	41	8	-
		82.0%	79.0%	62.0%	80.0%	-
I am considering ceasing my participation in the grading scheme.	58 27.00%	4	26	25	2	1
		18.0%	21.0%	38.0%	20.0%	100.0%

When invited to give comments on this issue, 87 chose to do so. 10 of these will remain in grading because of the need to be graded to access marketing opportunities.

Some of the reasons given by some of the 58 who intend to leave are:

- Lack of bookings from Visit Wales website - 14 mentions
- Costs of grading – 8 mentions
- Intend to be graded by the AA only in future- 5 mentions
- Issues with the Visit Wales assessors/s/assessment – 5 mentions

Other comments made related to dislike of the voucher system, refused grant funding, having to pay extra for advertising, loss of Country House Designator, no need for grading because it's possible to use internet for advertising, enough repeat bookings, dislike of assessor's overnight stay because of loss of business, customers are not interested in grading when enquiring, and owner is selling or retiring.

Some positive comments were also posted:

"As a small guest house being a member of a recognised scheme adds professionalism to the business"

"Friendly grading staff who give good advice in a non-critical manner"

"Better advertising opportunities."

SUMMARY

Hotels

The response rate from graded hotels was disappointing, with only 16% (38) of them participating.

On Grading and harmonisation

- Having the hotel graded is a business benefit and the majority say that the main benefit is being able to access marketing (77%)
- The harmonised scheme is endorsed as good thing and 66% intend to remain in grading
- Adequate time to prepare for the harmonised scheme was adequate in order to make any necessary adjustments. They are happy with the frequency of inspections (75%) and almost all have a disability Access Statement.
- The majority got the grades they anticipated (73%) and overall they were satisfied or very satisfied with the rating achieved (40%) A further 30% were neither unhappy nor satisfied.

On Issues of concern about the harmonised scheme

- Using Stars for all types of serviced accommodation was the correct decision taken as a consequence of harmonisation but that not all types of serviced accommodation is currently inspected under the most appropriate section of the harmonised serviced scheme.
- Just of over half confirm that Small hotels are correctly allocated to the Hotel standards for their grading
- The hoteliers' views on Designators indicate that their value lays in their usefulness to the consumer so the Designator "Guest Accommodation" in their opinion, does not add that value.
- The majority of hoteliers think that Restaurants and Inns with bedrooms to let need to be moved from the Guest Accommodation scheme and graded according to Hotel standards;
- While negotiating terms on harmonisation with other Tourist Boards, the then Wales Tourist Board argued to retain its stance that establishments with "Hotel" in their trading name should be graded as such since to do otherwise would mislead the public and if they were not agreeable to this, they would need to drop the word from their business name in order to be

assessed as Guest Accommodation. The majority of hoteliers here ratify that approach, agreeing that they should not have the “best of both worlds”.

- Over half however feel that serviced accommodation operators should be able to choose the designator that gets their business the highest Star rating.
- Other issues that concerned hoteliers were the need to prioritise them on we searches above Guest Accommodation and that there should be policing of businesses that misrepresent themselves to the public.

On Environmental good practice

- Most (30) consider this an important issue in terms of business practice and 14 thought the harmonised scheme took insufficient notice of this. More however said that they did not know (16).
- So few comments were received when asked to suggest changes to the scheme, Visit Wales can take no steer on this issue.

On Future participation in grading

- The majority (66%) intend to remain in the grading scheme for the next two to three years
- Those who say they intend to leave cite the following reasons for their decision: Grading scheme is unfair to hotels; customers look more at prices than ratings; the AA has a higher profile in the market place; unhappy that Stars are the symbol used for all serviced accommodation; no bookings from Visit Wales; percentage score achieved not being published alongside rating and finally, low Star rating gives the public a mixed message.

Guest Accommodation

The response rate to the survey from Guest Accommodation was 20%.

On Grading and harmonisation

- Having the business graded is of benefit to 174 (78%) survey participants and the main benefit is being able to access marketing opportunities (81%)
- The Harmonised scheme is endorsed by the majority as a good thing for the consumer and for the trade with 164 intending to remain in the scheme.

- The majority (151) believe enough notice was given by Visit Wales to prepare for the scheme's introduction and they are also happy with the frequency of inspections (177). Almost all -211, say they have prepared a disability Access Statement.

On Issues of concern about the harmonised scheme

- Using Stars for all types of serviced accommodation was the correct decision taken as a consequence of harmonisation (89%- 197) but that not all types of serviced accommodation are currently inspected under the most appropriate section of the harmonised serviced scheme.
- Unlike the hoteliers, Guest Accommodation operators do not feel that Small Hotels are correctly allocated to the Hotel standards for their grading. They presumably identify with the fact that Small Hotels are owner run like their own business.
- The GA operators' views on Designators indicate that their value lays in their usefulness to the consumer so for 157(72%) the Designator "Guest Accommodation", in their opinion, does not add that value.
- The majority- 144 (65%) of Guest Accommodation operators think that Restaurants and Inns with bedrooms to let need to be moved from the Guest Accommodation scheme and graded according to Hotel standards; 3 out of the 5 with "Restaurant with Rooms" in this survey disagreed with a move from Guest Accommodation and the same response exactly was received from the 5 with "Inn" as a designator.
- With an almost even split amongst GA operators on being able to choose the designator that allows businesses to get the highest Star rating, they have provided no clear lead on this issue.
- Guest Accommodation operators are also split on the decision agreed under harmonisation that accommodation with "Hotel" in its trading name should be graded under Hotel standards, (this reflects the response to the applicability of "Small Hotel" designator).

On Environmental good practice

- The issue is important to 203 (91%) of Guest Accommodation responders. 72 (32%) said that the harmonised scheme did not take sufficient notice of environmentally good practice but 103 (46%) said they did not know. Only 49 (22%) said that it did so. As with responses from the hotel sector, this does not give Visit Wales a clear steer on how best to address this issue.

On Future participation in grading

- The majority of responders intend to remain in the scheme for the foreseeable future -164 (73%)
- The 58 (27%) that say they will leave cite the following main reasons - lack of bookings from Visit Wales website; the cost of grading; will choose the AA as their sole grading body; and finally issues with VW Quality Assessors.

Recommendation

- Share the results with the Small Hotels Sector Forum (SHSF) and other key stakeholders, and provide an online summary to all businesses.
- Seek key stakeholders support for a review with Visit Britain, Visit Scotland and the AA focusing mainly on -
- Responses to “Issues of concern about harmonisation”
- The best approach to take to address environmental good practice issues