The present and future of hotel star ratings through the eyes of star rating operators

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Abstract

Purpose – The purpose of this study is, first, to determine which developments have shaped official hotel classification systems over recent years (including the impact of guest-review platforms) and second to establish the future of those systems through the eyes of the people who are actually in charge of operating them.

Design/methodology/approach – Semi-structured interviews were chosen as the most suitable method for approaching hotel classification system administrators. This method is in line with previous research on approaching key informants in their respective fields. Sixteen people representing 12 different official national hotel classification systems from across the world as well as one commercial hotel star rating system participated in the online interviews.

Findings – The first main conclusion is that hotel classification systems – especially voluntary ones – would not have survived the enormous impact of guest-review platforms without quickly adjusting to the ever-changing hotel industry landscape. The frequent review of classification criteria and procedures has become the main survival strategy of classification systems. The second conclusion is that system operators are strongly optimistic about the future outlook of hotel classification based on their proven flexibility to swiftly adapt to new market conditions.

Originality/value – Research about hotel classification systems is usually based on the views of the systems' users, i.e. hotels or hotel guests, whereas the present paper reflects the perspective of the systems' operators, an angle rarely analyzed in the literature.

Keywords Hotel classification, Hotel stars, Star rating, Guest reviews, Hotel industry, Service quality

Paper type Research paper

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1. Introduction

This paper discusses the classification of hotels according to star categories. Stars are the most commonly used symbol for classifying hotels, with a classification ranging between one and five stars being a globally recognizable form of rating hotels (Martin-Fuentes, 2016). Instead of using stars, some countries or organizations have opted for alternative symbols such as diamonds or crowns (WTO and IH&RA, 2004).

Star ratings are about providing consumer information to hotel guests based on published criteria and assuring them about the quality of the establishment they have booked (WTO and IH&RA, 2004). Star ratings are being performed according to the common physical and service characteristics of hotels and reflect the comfort offered to hotel guests and the adherence to safety and hygiene standards. In their most recent reiteration, there is a clear trend from obligatory to voluntary star classification (Hensens, 2011), meaning that hotels in a growing number of countries need to be convinced to pay for being rated.

Another much-scrutinized topic is the relationship between official hotel classification and guest ratings on social media and online travel agencies (OTAs) such as guest-review platforms like TripAdvisor and HotelCheck, as hotel guests are being greatly influenced by the ratings and

reviews of other guests. According to Blomberg-Nygard and Anderson (2016, p. 139), *"The emergence of online guest reviews in the last decade has challenged the necessity for hotel classification systems, with critics arguing that guest reviews are better at providing a benchmark on the quality and range of services a hotel can offer. Conversely, critics of guest review systems point to the difficulty of verifying their authenticity and to their lack of objectivity."* Interestingly, many such review platforms and OTAs employ stars or star-like symbols for their users' ratings of hotels and other businesses alike as in the case of TripAdvisor (one to five circles), Google Reviews (one to five stars) and Expedia (one to five points), leading to confusion whether those guest ratings represent the respective hotels' official classification or not. Others – such as Booking.com and Priceline – are opting for a one-to-ten-point scale to differentiate themselves from traditional hotel star ratings.

The emergence of the aforementioned guest-review platforms has been one of the key developments in the field of hotel star ratings. Based on interviews with the operators of hotel star-rating (or classification) systems, the present paper focuses both on determining which those developments have been in recent years and also on the future outlook of official classification systems considering that they have increasingly become voluntary. As hotels in a growing number of countries can choose whether they will obtain an official star rating or not, will the operators of classification systems be able to carry on with their business?

Even though star ratings have been a constant feature of the hotel industry for many years, research about their future outlook has been limited (see, for instance, Hensens, 2015; Blomberg-Nygard and Anderson, 2016; Hensens, 2016; Maravić, 2017; Vagena and Papakonstantinidis, 2020b). The present paper aims at enriching the literature and gaining a better understanding of the direction of official hotel classification systems not from the viewpoint of the systems' *users*, i.e. hotels and hotel guests, but from the perspective of the systems' *operators*, making this the first study with such an approach.

Following a review of the limited research around recent developments and the trends shaping official star ratings, the present paper describes the design and findings of semi-structured interviews with hotel classification system operators aimed at shedding light on the future outlook of those ratings. Based on these findings, several conclusions about recent and future developments in the field of hotel classification are being formulated. Particular attention is being paid to the managerial implications of the current study, thus providing practical guidelines to star-rating providers about how to best prepare for the foreseeable future.

In short, the present paper extends the research on hotel star ratings by adding new insights into the current and future trends of those ratings. This under-researched area is for the first time being approached from the perspective of hotel classification system operators and, thus, represents a novel contribution to literature with a particular managerial focus.

2. Literature review

The hotel rating systems provide consumers with an easy way to compare hotels and serve not only hotels and hotel guests but also the travel trade such as tour operators and travel agencies (Narangajavana and Hu, 2008; Nunkoo *et al.*, 2020). In some cases, OTAs are showing the official star ratings side by side with their own guest rating scores of the hotels displayed on their online platforms. The main limitation in using star ratings for comparing hotels is the fragmentation of hotel classification systems, as each country – and in the case of Italy and Spain even each region – uses its own system with a distinct set of criteria, thus creating confusion to hotel guests about what level of quality and comfort to expect (Núñez-Serrano *et al.*, 2014). These differences among classification systems reflect the cultural, economic or national traditions of the respective countries (Maravić, 2017). Núñez-Serrano *et al.* (2014) stress the importance of a universal, more credible and more customer-oriented system so that international travellers can have a more accurate picture of what hotels are offering.

Another topic being explored in literature is whether star-rating systems manage to remain relevant and up-to-date. Going for years without an update, many star rating systems are using outdated classification criteria, thus affecting their perceived reliability (Martin-Fuentes, 2016). This makes it necessary for hotel classification systems to be constantly upgraded regarding both infrastructure criteria and service-related criteria, thus maintaining customer trust and satisfaction (Sepula and Bello, 2019). A star rating system can be seen as a "living organism" that is obliged to adapt to the quickly changing conditions of the hotel market, especially regarding rapid developments in online marketing and distribution (Kim *et al.*, 2019; UNWTO, 2015; Vagena and Papakostandinidis, 2020b).

The typology of star ratings has also been explored in literature. Star ratings may take the form of either *official hotel classification systems* operated or overseen by government agencies (usually on a mandatory basis) as well as hotel or automobile associations (usually on a voluntary basis); or of *nonofficial commercial hotel rating systems* implemented by private organizations such as publishers of travel guides on a purely voluntary basis (Narangajavana and Hu, 2008).

Hotel classification is foremost a quality assurance tool but is also utilized for marketing purposes, allowing classified hotels to increase room occupancy and charge higher room rates (Narangajavana and Hu, 2008). Research by Beaumais and Giannoni (2018), however, contradicts the latter; based on research among a sample of Corsican hotels, the two authors could not establish any price premium among hotels voluntarily joining the French national classification system.

A significant part of the literature on hotel classification from the 2010s focuses on the impact of guest reviews on the future of official star ratings, predicting that both hotels and guests would lose interest in official star ratings considering the immense influence of guest rating platforms such as TripAdvisor on buying decisions (Blomberg-Nygard and Anderson, 2016; Hensens, 2011; UNWTO, 2014). A key issue being discussed is the perceived validity of guest reviews considering how subjectively guests can judge their hotel stay and even how hotel ratings can be manipulated through positive or negative fake reviews (Mayzlin *et al.,* 2014). Despite being considered more valid and objective, classification by expert inspectors remains less influential than guest reviews, however, there is a positive stance of hoteliers and hotel guests toward integrating guest ratings into official hotel classification (Blomberg-Nygard and Anderson, 2016).

According to Israeli (2002), star ratings are extremely important to the hotel industry and can boost growth in sales and prices. Research conducted by Martin-Fuentes (2016) also demonstrates that there is a strong correlation between star classification, prices and guest ratings, i.e. the higher the star category of a hotel, the higher its guest rating score and its room rates will be. In the case of voluntary classification systems, classified hotels command a much higher room rate than unclassified hotels, thus providing a significant incentive for hotels to apply for a star rating (Blomberg-Nygard and Anderson, 2016). Sufi (2018) lists common and non-common features of classification systems and argues that service quality is most anticipated in four- and five-star hotels. In addition, Sufi and Shojaie (2018) describe nine features of classification systems and propose an improved customer satisfaction framework.

A few researchers have investigated specific aspects of hotel classification, such as environmental management standards that have been incorporated into several national classification systems (Hensens, 2016). Another significant research stream explores the relationship between star ratings and service quality at hotels, including, for instance, Tsao (2018), Mohsin *et al*. (2019) as well as Nunkoo *et al.* (2020). One additional research stream focuses on national case studies such as the implementation of a new classification system in Slovenia (Maravić, 2017) or in Israel (Talias, 2016). Kovács (2018) focuses on whether environmental practices are being considered as part of an official hotel classification system and how they are integrated into the systems under investigation, while also exploring whether sustainability criteria form part of the Hotelstars Union's (HSU) cooperative system.

There is a lack of a global star rating system, even though the UNWTO has been advocating for such a system for many years (Talias, 2016). A global system would be difficult to implement due to great differences between countries regarding their cultural, political, economic, environmental

and social attributes, however, there are also numerous common elements when comparing star rating systems from different countries (UNWTO, 2015).

A few studies represent international comparative analyses of classification systems in different countries. Among them are the works by WTO and IH&RA (2004), Cser and Ohuchi (2008), Minazzi (2010) and UNWTO (2015) and more recently Vagena and Papakonstantinidis (2020a).

The aforementioned contributions have mostly explored the types of hotel classification (official vs nonofficial, mandatory vs voluntary); the detailed classification standards and changes in criteria over time (e.g. technology, sustainability); the importance and usefulness of star ratings for the hotel industry; their perceived validity and relevance as quality assurance tools for maintaining customer trust and satisfaction; their need to continuously adapt to changing market conditions; the impact of star classification on room rates; the different approaches to hotel classification at the national and regional level and the ensuing confusion for hotel guests; and the major impact guest-review platforms have had on star ratings.

Very few contributions have approached star ratings from the perspective of their operators, i.e. the organizations in charge of conducting hotel classification, even though their managers can be considered the foremost experts on this topic. Thus, there is limited knowledge about how these experts view the present and the future of star ratings, a knowledge gap worth exploring further.

Additionally, very limited research has been conducted about the *future of star ratings*. For instance, Hensens (2015) argues that online guest reviews and ratings will have a growing impact on how guests perceive and choose their hotel accommodation, while at the same time, many hotels choose not to apply for an official star rating and instead rely on the positive ratings they receive on social media and OTAs. Hensens predicts that by the year 2024, voluntary hotel classification systems will be forced to somehow integrate with social media and include guest opinions in the star rating algorithm (as in the case of Abu Dhabi) or else witness a further drop in hotel participation. Hensens (2015, p. 73) makes the point that through this alignment with social media, *"the hotel product will be shaped more directly by what consumers appreciate and not what expert inspectors dictate. This democratisation of the rating process will lead to an innovation revolution whereby hotels seek to respond quicker to consumer trends as they have a direct feedback loop to their position in the market".*

No other reference to the future of hotel star ratings could be found by the authors. Thus, the present paper aims at covering this gap by exploring the outlook of official hotel classification *in the foreseeable future* and by taking into account the major factors shaping this particular domain *from the particular viewpoint of classification system operators,* considering their in-depth knowledge of this topic.

3. Research design and methodology

Qualitative research has been selected as the proper way of approaching the topic of the present paper. The *first research objective* was to determine which trends and developments have shaped the hotel classification systems over recent years (including the impact of guest-review platforms), whereas *the second research objective* was to establish the future of those systems through the eyes of the people who are actually in charge of operating them.

Semi-structured interviews were chosen as the most suitable method for approaching the foremost experts in the field of hotel classification, which are the people directly involved in administrating classification systems across the world. This method is in line with previous research on approaching key informants in their respective fields (Mariani and Predvoditeleva, 2019; Rodríguez Sánchez et al., 2022). By characterizing key informants as *"expert sources of information",* Marshall (1996, p. 96) stresses that *"the key informant technique is a qualitative research method which has been used extensively and successfully in several branches of social science investigation. [...] The principle advantages relate to the quality of data than can be*

collected in a limited period of time and the approach is potentially useful as an isolated research technique or in conjunction with other qualitative methods".

A semi-structured interview guide has been developed in accordance with the five-step process described by Kallio *et al.* (2016) for ensuring the trustworthiness of research findings. Concerning the *prerequisites* for using this method and following the consideration of potential research methods, the authors concluded that semi-structured interviews were most suitable for exploring perceptions, professional judgments and different viewpoints of classification system operators in accordance with the two research objectives (Phase 1). *Previous knowledge* for setting the proper framework for the interview guide was secured in two ways (Phase 2): first, by conducting a literature review on the present topic and, second, by conducting content analysis and cluster analysis of the detailed classification criteria of 39 national hotel classification systems (Barriball and While, 1994; Turner, 2010; Krauss *et al.*, 2009). This input was used for formulating a *preliminary semi-structured interview guide* comprising questions aimed at generating in-depth answers from interviewees (Phase 3). The interview guide was *pilot-tested* in February 2021 with representatives of a specific country's official classification system (Phase 4); based on this testing, the wording of several questions was improved and the number of questions adjusted to the aimed interview duration of 30 min (Barriball and While, 1994). Following these steps, the interview guide was *finalized* (Phase 5).

Due to the nature of the topic, the present paper is based on convenience sampling (Mariani and Predvoditeleva, 2019). A combination of web search and snowball sampling was used for creating a list of hotel classification administrators based on all continents (Rodríguez Sánchez *et al.*, 2022). First, websites of official national hotel classification systems were examined in search of names and contact details of their managers. Second, HSU, a European network of national classification systems, was approached for contact details of its member organizations. This resulted in a list of 34 people directly involved in developing and operating hotel classification systems, who received an invitation to participate in an online interview. Some invitees refused to participate, while others did not respond to the emailed invitation.

Finally, 16 people accepted the invitation to participate in an online interview. Their actual number is not of concern, as the sampling of this qualitative research does not aim for representativeness but emphasizes the in-depth working knowledge of the classification systems and the rigor of interviews (Rodríguez Sánchez *et al.*, 2022). The sample size proved to be sufficient, as there was thematic saturation during coding (see below; Adeoye-Olatunde and Olenik, 2021).

All interviewees have first-hand experience of hotel classification. Of the 16 interviewees, 12 are currently operating their respective country's **official national hotel classification system** or did so until recently. Two interviewees are independent experts of hotel classification, one heads a major private hotel star rating company based in the USA but with a global presence spanning 73 countries (Forbes Travel Guide) and there is also a representative of HOTREC, the European Association of Hotels, Restaurants, Bars and Cafés bringing together 45 national associations in 34 countries.

Interviewees participating in the survey were from Germany, Austria, Greece, Cyprus, the USA, Hungary, Latvia, Slovenia, Sweden, Azerbaijan, Thailand, Italy, South Africa, New Zealand, Norway and Belgium.

Of the 12 official national hotel classification systems represented in the present survey, 8 are full members or cooperating with HSU. HSU was founded in 2009 by a group of seven national hotel associations from Europe under the patronage of HOTREC with the aim of providing a harmonized hotel classification with common criteria and procedures in the participating countries. HSU enhances the reputation and quality of the hotel industry in the participating countries by creating transparency and security for the guests and thereby encouraging hotel marketing. Since its inception, HSU has expanded to a total of 20 countries with plans to further grow its European membership.

The semi-structured interviews were conducted during the months of March and April 2021 by using an 11-item questionnaire as an interview guide. Apart from one question, the remaining 10 questions were open-ended. Interviews were conducted by using Zoom. The average duration of interviews was approx. 30 min.

Interviews were transcribed by the two researchers and interview data was coded for identifying and labeling topics, similarities and differences in the quotes of interviewees (Adeoye-Olatunde and Olenik, 2021), thus attributing interpreted meaning to the collected data (Saldana, 2016). More specifically, as part of this qualitative inquiry interview, the transcribed interviews were assigned short phrases capturing and summarizing the essence of the answers given, with similar answers being grouped together (Saldana, 2016) and interesting quotes being identified to be used in the following chapter. Due to the straightforward nature and the clarity of the answers given, coding was completed in a single cycle without the need for a second cycle. Coding performed for analyzing interview data was inductive due to the paper's focus on participants' views and judgments and led to thematic saturation, as themes in the answers of participants kept repeating themselves.

For enhancing rigor and trustworthiness of the research findings, a draft report was sent to all interviewees with the question of whether their answers and positions have been correctly summarized and whether they wished to make any changes (Adeoye-Olatunde and Olenik, 2021). Eight interviewees made use of this opportunity and sent back comments for minor adjustments to their statements.

4. Findings

The discussion with interviewees centred around both the present and the future of the hotel classification system. Their views and positions are being summarized below.

4.1 Recent developments and key attributes of classification systems

In their answers to Question 2 *(Which are the objectives and the main focus of your classification system?)*, most interviewees focused on **service quality** and the **customer experience** that a hotel should offer to its guests. Measuring and improving those intangible elements is nowadays the **main challenge of a classification system**, as opposed to the task of assessing buildings and equipment which preoccupied the hospitality industry for many decades. It's very much a *hardware* vs *software* dilemma, with the "software" dimension gaining ground over recent years. An up-to-date classification system can be a useful tool both by helping hotels improve the guest experience and by informing travellers about what to expect from their hotel stay.

Thus, emphasis should be put on a *"quality management system helping member hotels maintaining and improving standards,"* according to the representative of Sweden, so that guests will know what level of quality to expect when choosing a star-rated hotel. This makes it necessary for classification operators to shift attention from hotel facilities to customer experience and service quality, a transition many hotels are still struggling with.

An in-depth understanding of the actual customer experience offered by an entire industry can be achieved with the help of technology. Therefore, several classification operators are already working or considering to work with **guest-review aggregators** such as *TrustYou* and *ReviewPro* for conducting sentiment analysis among hotel guests in their country and for identifying frequent complaints and changing guest attitudes that they need to consider when revising the classification criteria. In the words of the representative of Cyprus, *"we are in the process to incorporate **online reputation management** side by side with the classification system as a new tool to give us very useful and concrete indications concerning the standards of the services provided by different hotel establishments."*

The approach of Forbes Travel Guide can be summed up as follows: *"We verify luxury service and facility standards at the highest level,"* with its algorithm being weighed 75% for service and 25% for facilities. Or, to use the words of the Greek representative, finding the proper balance between *technical and functional standards* is the key challenge for classification operators. According to a hotel classification expert from South Africa, hotel stars can be a useful tool for helping hotels charge higher rates by offering an attractive value-for-money proposition and quality assurance to future guests.

Based on the replies of interviewees and the coding of their answers, the following *recurring keywords* about the objectives of a star-rating system have been identified:

1. Transparency, so that both guests and hoteliers know what stars stand for

2. Service quality

3. Quality of the guest experience

4. Fulfilling guest expectations

5. Safety and security

6. Cleanliness and hygiene

7. Maintenance

8. Sustainability

The HSU has been the main point of reference for most interviewees answering Question 3 *(In which way has your classification system changed during recent years?).* HSU has a policy of reviewing and updating its classification criteria every five years, thus avoiding becoming obsolete. The last revision from 2020 tackled the following key issues:

1. More flexibility for accommodating all technological developments, especially those concerning communications (for instance, replacing the standard "telephone in room" with "communication device in room" as tablets are being used by a growing number of hotels as in-room devices; allowing for self-check-in or online check-in as alternatives to checking in at the front desk; acknowledging the capabilities of a smart TV)

2. Sustainability issues (offering additional points for eco labels; opting out of linen change; charging stations for electric vehicles; waste reduction by eliminating individual bathroom amenities, magazines, newspapers and other print information, etc.)

3. Health, safety and hygiene issues amplified by the Covid-19 pandemic

The pace of revision outside of Europe is even faster, with Thailand and South Africa updating their classification system every two and three years, respectively. Changes have evolved around technology integration and a bigger emphasis on hygiene. In South Africa, for instance, Wi-Fi is *"among the most important aspects of star ratings. We leave it to hotels to decide on criteria such as size of safe based on their market mix and types of guests, so we are a lot more or a lot less specific and lenient and let hoteliers decide what is fit for purpose."*

South Africa also introduced more hotel categories in 2019 such as small hotels, apartment hotels, boutique hotels, etc. with very specific definitions that are used in addition to the hotel stars. Additionally, South Africa acknowledged the global move toward a higher rating than just five stars by introducing the "5-star premium" rating as an extra motivation for hoteliers.

New Zealand has put special emphasis on sustainability criteria. Hotels consider environmental issues a major trend and their question was how Qualmark – the country's star rating operator – will lead that process. Since the last review in 2018, hotels are receiving points on a 1-to-5-point scale by measuring environmental indicators (e.g. electricity used against guests or rooms, whether there are timers installed, etc.). Qualmark is now considering providing excellence scores to hotels going through formal carbon print analysis, a more complete waste management analysis, etc.

Greece has further expanded the options for collecting points as part of the star-rating process by recognizing a growing number of certifications (e.g. ISO 9000, environmental certificates, Greek Breakfast; Boutique Hotel, etc.) and increased the weight of sports, wellness, recreation and entertainment as hotel offerings.

The success and rapid growth of HSU have also shown that **cross-border cooperation** and **harmonization of hotel classification systems** have been long overdue. The case of Latvia is quite telling: The country operated its own national classification system until 2006. Between 2006 and 2010, they joined the Baltic system, later on, the Nordic-Baltic system, and finally the HSU, which is considered more objective. Thus, the geographic scope of cooperation in hotel classification in Europe kept expanding and now encompasses 20 countries.

Another change mentioned by some interviewees is the transition from their old rigid system with facility-centric checklists to a more flexible system combining both mandatory and voluntary criteria. The representative of Cyprus describes the reasoning behind this transition:

> Before this new classification system, we were implementing a system which was based mainly on criteria setting the minimum standards for each class such as areas and dimensions of bedrooms and bathrooms and the lobby area, number and capacity of restaurants, indoor and outdoor swimming pool etc. This system was not as flexible as the new system, resulting in hotels of the same class offering very similar products with similar services and facilities. E.g. all five-star hotels were forced to have a ballroom. For this reason, we didn't have specialized types of hotels like adults-only hotels or family hotels or business hotels etc. [and] ended up with very similar hotels. This is why we proceeded with the new system.

Answers to Question 5 *(Have you witnessed any change in attitude by hoteliers and travellers toward hotel classification over recent years?)* have focused mostly on the impact of TripAdvisor and other guest ratings platforms on star ratings. Five to ten years ago, travellers started to heavily rely on those platforms for choosing their accommodation and frequently became confused with the platforms' own ratings (e.g. a four-star hotel on an OTA's platform may not be a four-star hotel in reality). This situation forced classification system operators to adapt their star ratings to the new conditions, as hoteliers came to believe that hotel stars are not as relevant as they used to be. Those changes to classification systems convinced hoteliers that hotel stars still have a role to play and have been supportive of the rollout of mostly voluntary star rating systems in Europe and beyond.

The representative of Austria sums up the situation as follows: Official classification offers an **objective evaluation** of hotels, while guest-review platforms provide **subjective opinions** and ratings made by travellers. Both have their value and are **complementing** each other to inform travellers. The pandemic acted like a reminder that classification is still very important (especially in regard to hygiene and safety) and made hoteliers consider future investments and classification, since hotel stars are both marketing and quality management tools, especially for smaller hotels.

A hotel classification expert from Norway mentioned some interesting points:

1. OTAs had this big success with their hotel review and rating platforms not just because of the shared first-hand experience of other hotel guests, but also because OTAs could recommend appropriate accommodation based on each traveller's profile and filters (such as family travel or business travel).

2. Classification costs money and hoteliers are not fond of spending money either for the inspection itself or for adjusting their offerings to the classification criteria (such as bed dimensions).

The representative of Cyprus adds that *"the comments which are uploaded by the hotel guests are becoming very useful data for the hoteliers in order to take appropriate action to improve the image and the services of their business,"* however, not many hotels are capitalizing on this freely available data about their own and their competitors' business.

Guest-review platforms have lost some credibility due to growing awareness among travellers about fake reviews, bought reviews or revenge reviews. The star rating expert from South Africa explains that hotels started to concentrate more on guest reviews about 5–6 years ago instead of focusing on something like an independent grading: *"If you are using guest reviews to govern and to try to understand your quality, you are using a very skewed approach, because you don't understand the frame of reference of each of those individuals who are staying in a property. You are also applying a very subjective instead of an objective approach which is the star grading. Over the years we did a lot of media and marketing campaigns in order to drive the importance of having an independent quality assurance body to come and verify your product against international benchmark criteria. We also encourage hotels to use review systems on various platforms as a benchmark during the course of the year to monitor and continuously deliver. [. . .] It's a very big goal to introduce guest reviews into the overall quality assurance program for South Africa, because we do see a benefit in monitoring the provision of a quality product and a quality service during the course of a year."*

HSU has been coping with this situation quite well as can be seen in the following answer by the representative of Germany:

> Subjective reviews on TripAdvisor, HolidayCheck etc. are changing the game, letting us focus on objective criteria and reduce the subjective elements in the hotel classification. The customer gets the best of both worlds, so let's focus purely on what we can do best, which is controlling objective criteria and make the best use of subjective reviews.

> We use the Internet for having a picture of the hotel's strengths and weaknesses before auditors assess each business (e.g. sources of complaints). So, auditors know whether guests are complaining about the breakfast or cleanliness and know where to look. We have a surveillance algorithm in place alarming us of any dramatic change, so we check with the hotel about the reason.

Answers to Question 6 *(Would you say that official hotel classification systems are facing competition from guest rating platforms such as TripAdvisor or from others? How is this affecting you?)* show that most interviewees see guest rating platforms not as competing but as complementing the official star ratings. These platforms play an important role can be easily accessed anytime and anywhere and are an invaluable source of information for both travellers and hoteliers. But there is also manipulation happening with fake reviews either in favour or against a hotel.

The representative of Germany explains how customers are making the best of both worlds: *"When looking for an unknown hotel, they are looking consciously or unconsciously for the stars – they trust the stars – and then they are checking what other customers have written about the hotel."*

Some official classifications – such as the one of Abu Dhabi – have incorporated guest ratings in their algorithm, while other classification operators are considering or even experimenting with this approach.

Both official star ratings and guest-review ratings have to constantly prove their credibility and each side needs to work on this. Platforms, in particular, are under pressure to tackle fake reviews. According to Forbes Travel Guide, it all boils down to integrity and being unbiased when rating a hotel.

The representative of Azerbaijan stresses that auditors check hotel reviews on TrustYou before inspection and that they prepare a summary of potential weak points. 80–90% of problems highlighted by reviews are usually confirmed by auditors on-site (the remaining 10–20% has been resolved in the meantime).

The representative of Germany pointed out an interesting dimension: There was **a recent court decision in France against Booking.com** using their own stars instead of the official hotel stars. Now the company is forced to use only official stars on its website. Booking.com already

cooperates with Germany in regard to data exchange and has been supplied with the official star ratings of all German hotels.

This is happening in other countries, as well. According to New Zealand's representative, *"now some OTAs have reinstated the official Qualmark ratings, while two years ago they would have used self-rating and guest ratings."*

4.2 Future developments of classification systems

In their answers to Question 7 *(There has been much discussion in the past about whether there could be a global star-rating system applicable to all countries. Do you think that this would be feasible and useful or are differences between national hotel industries too large to fit within the same system?),* interviewees pointed out that despite the obvious challenges, there are examples of successfully expanding star-rating systems to other countries. HSU is presently the official classification system in 20 countries, whereas Forbes Travel Guide inspects and certifies hotels in 73 countries. There has also been some cooperation between countries of Southern Africa.

There are, however, historical and geographical differences that may impede the adoption of a multinational classification system. Italy, for instance, has nine different systems, as is the case with Spain's 17 regional systems. It will take plenty of political goodwill in these countries to accept a national – and perhaps a multinational – system.

The founders of HSU agree about the most crucial success factor of HSU: **It is a bottom-up and not a top-down initiative**, meaning that this project started from the sector itself, that the national hotel associations agreed on how to implement this. Would it come from the top such as the European Union, they doubt that such an undertaking would have been successful.

The representative of Germany said that while that was not their intention, the founders of HSU have proven that a European-wide classification system is feasible. Further expansion of HSU must deal first with each potential member country's national characteristics. According to the representative of Austria, *"there are differences such as very traditional hotels in several countries which should have their space in the system, but we want to be flexible to also include new hotel concepts."*

Interviewees considering a global system as feasible, think that having such a system is beneficial and will resolve some of the travellers' questions and insecurities when picking a hotel. According to the Norwegian classification expert, the criteria of such a system need to be very broad and not too detailed, so that they can be adapted locally. The representative of Thailand proposes a **modular approach** stressing that a global system should have some common standards plus some added national criteria to be defined by each country.

Other interviewees are not in favour of a global system, especially in the case of a top-down approach as stressed by the representative of HOTREC. According to the representative of Cyprus, *"it's not a good idea to globalize everything. Every country has its own culture, attitude, its own quality and characteristics that make each nation unique and different from other destinations. A beach resort in Cyprus is different than a beach resort in Philippines or the Caribbean."*

Numerous recommendations have been made by the interviewees in their answers to Question 9 *(What does it take for star ratings to remain relevant in the future? What are the characteristics of a future-proof star-rating system?).* Countries participating in HSU praised the network's policy for **regularly reviewing and updating** its classification criteria in accordance with technological and social developments and changing guest preferences. HSU has a five-year revision cycle, but some interviewees consider a shorter cycle as necessary as the market situation is changing rapidly.

Evolution is a key concept (Forbes Travel Guide), as the people operating the system must be willing to evolve and see how human behavior is changing in the luxury arena. Covid-19 is the most

recent example of how behavior is changing, making it necessary to evolve star-rating standards and to reflect how hotels operate today without compromising a luxury guest experience.

The pandemic has reminded everybody in the industry how important it is to listen to what the guests want and deliver, as pointed out by the representative of Germany: "*We will see requirements for more space, for a kitchenette in the room (this is why holiday flats are booming). I can imagine that we will reflect on this in our criteria. It's a living system and you have to constantly adjust to consumer needs.*"

Transparency is also a keyword that came up several times during the interviews. This means that travellers should have a very good understanding of what hotel star categories stand for and what to expect from a hotel. Hoteliers should also be fully aware of what standards they are expected to adhere to.

Finding a way of incorporating **guest reviews** into the official star classification is being mentioned as a priority by several interviewees, who also point out that several countries are already doing this such as Norway and Abu Dhabi. As the representative of Cyprus puts it:

> Develop a model which can incorporate reviews from the various platforms into the system. This way we will be able to cover all the **subjective issues** related to the operation of hotels such as cleanliness, the feel and the warmth of hospitality, overall staff attitude, their smile and behaviour, the quality and quantity of F&B, and other attitudes relevant to the intangible aspects of hotel operations. Following this philosophy, we will be able to have a very clear picture of the facilities offered by the hotel which cover the issue of objectivity and on the other hand we will have a very clear picture of issues related to the subjectivity of hotel operations.

Greece is providing individual hotels with access to reports by guest-review aggregators as well as other market reports for a better understanding evolving needs and preferences of customers.

In the end, as the Norwegian classification expert is noting, star ratings should reflect **value for money** and assure guests that they will receive a hospitality experience worth its money.

Nearly all interviewees are strongly advocating the need of continuing onsite **inspections** of hotels in their answers to Question 10 *(How do you expect hotel assessments to be made in the future? Through inspection and/or other means?).* As the representative of Forbes Travel Guide puts it:

> To maintain the integrity of a system such as ours, the only way right now that you can really just do without question, that is as fool proof as it can possibly be, is through personal inspections. We are measuring human reaction to human behavior. And while we know the advances in artificial intelligence (AI), at the end of the day a computer right now can only do so much. They don't know if you are sad. As a human you can tell by the facial reactions and the tone of voice how guests feel. Sometimes it's enough to walk through the lobby to see whether a guest is frustrated or upset or lost and offered a service before they ask for help. Our evaluation process captures all of that. So down the line, could there be some AI to support that? We are open to that and we are always looking at it, but as we sit here today, that's not possible.

Without visiting, it is difficult to get the right feeling about the hotel. There is great value also in meeting and discussing with the hoteliers instead of having an impersonal transaction with the users of the classification system as pointed out by the representative of Sweden. The representative of Germany explains his point of view:

> Inspections are essential, this is a USP we can deliver. Whatever the number of stars, [. . .] every three years the latest the hotelier will open their hotel to colleagues and competitors to have a check on it if it is performing well. Even if it is a one-star hotel, you can be sure the colleagues are willing to open it. Otherwise, you would not get a single star. If there is no hygiene or whatsoever, there is not a discount on stars, they are advised to leave the hotel without stars. Therefore, inspections are essential. Algorithms help being up-to-date during the time between inspections. The auditors have to inspect the hotel's website before going to the hotel [. . .] to check if the picture on the web is a realistic one; if not, you don't get classified. [. . .] We focus on things that are objective, that we can take to court if it is needed. We try to reduce the subjective elements.

The view of the New Zealand representative is quite similar:

> In 2015 we went from visiting every two years to visiting annually. When you are there, you get a sense of whether [hotels] have issues, so we should revisit them next year, or see that they have good maintenance and management programs in place and say we are fine for a longer period. I think [assessments] will continue to be done by an assessor. Considering the breadth of hotels, I would be reluctant to move to a self-assessment model.

On the other hand, inspections are not the perfect standalone solution, either. According to the representative of Cyprus, *"I don't know how much relevance inspectors and mystery guests will have in the future. Mystery guest inspections are like taking a picture of the moment. On the other hand, with data from the Internet concerning online reputation we have updated information concerning all these aspects of the hotel."*

Some interviewees consider combining inspections with **self-evaluation**, while others have to be pragmatic as in the case of Slovenia, where budgetary constraints do not allow for regular inspections. Another avenue to follow is utilizing **guest reviews** as a complement to inspections, however, there are some doubts about the validity of those reviews as in the case of the representative of HOTREC:

> Linking guest reviews to star ratings is quite tricky, these are two different ways of assessing the quality of a hotel, the one is objective based on criteria and the other purely subjective and can be the results of a tantrum or a misunderstanding. There is to some extent confusion, and the idea to combine star-rating processes with guest-review ratings as some kind of aggregate score has even been voiced, albeit dismissed, within European Commission expert groups.

A resounding "yes" is the answer to Question 11 *(Finally, do you think that official hotel classification and star ratings will be around after, let's say, five years from now?).* Many expect changes to happen over the next years, but official star ratings will still be around after five years.

The key takeaway from this question is that as long as hotel classification can adapt to the changing landscape and prove its usefulness, it will stay relevant and have a role to play. According to Forbes Travel Guide, *"it's our job not just to provide clarity for people looking to choose where to spend their money when they are traveling, but also to support the hotel community and especially now with the pandemic giving consumers confidence to travel again."*

So, it is all about remaining useful, being flexible to accommodating the changing needs of both travellers and hoteliers, providing transparency but also third-party verification – an independent assessment – to all the Internet-sourced information that can become overwhelming and confusing.

The representative of Germany shared the following story to explain his optimism regarding the future of hotel star ratings:

> In 2010 in France the hotel classification was changed from a mandatory system to a voluntary system conducted by Atout France. But not all French hotels had a classification. So, when the new system launched, only 50% were classified. For the other hotels, all stars on the web, on Booking, Expedia etc. had to vanish. And from the very next moment, those hotels weren't sold anymore. Only hotels with a star symbol were sold. So, deep in the heart of customers [. . .] **stars are the currency of hotels**. If they are not there, it feels uncomfortable. We had some legal complaints against OTAs like Booking.com in Germany because they used their own stars from an algorithm from sources they sometimes couldn't even explain where their stars came from. They were taken to court and they were sentenced that if they use stars, it must be ours. So, they are now equipped with an interface to check our database any time. I think with all the fraud on the web, hotel classification, if conducted the right way, will even have a greater importance in the future.

5. Discussion and conclusions

The present survey provides insight into the way star rating professionals perceive current challenges and, thus, adds to the very limited literature about recent and future developments in

the field of hotel classification. Their answers helped determine the trends and developments that have shaped hotel classification systems over recent years, as per the *first research objective.* The interviewees also clearly presented their expert views on the future of those systems, as per *the second research objective*.

The interviews noticeably reflect the pressure felt by classification system administrators to constantly adapt to the ever-changing hotel industry landscape. As a growing number of national classification systems are voluntary, there is a persistent need to convince hotels to undergo an official star rating. Those systems have strongly felt the impact of guest rating and review platforms over the last decade and were forced to adjust their modus operandi to remain relevant. Interestingly, even though the Covid-19 pandemic was not the focus of the present survey, almost all interviewees commented on how their work was affected and how classification criteria related to hygiene and safety proved their worth during this difficult period.

Thus, the **first main conclusion** of this paper is that there is consensus among interviewees on the need for constant change: Hotel classification systems – especially voluntary ones – would not have survived the impact of guest ratings without adjusting to the ever-changing hotel industry landscape. Thus, quick adjustment to changing market conditions through frequent review of classification criteria and procedures has become the main survival strategy of classification systems (see also UNWTO, 2015; Sepula and Bello, 2019; Vagena and Papakostandinidis, 2020b).

The **second main conclusion** reflects the consensus among interviewees that official hotel classification definitely has a future: The classification systems' proven flexibility to quickly adjust to new challenges explains the optimism of the systems' operators and their certainty about the future outlook of hotel star ratings.

With the survey covering the foremost experts in hotel classification and their first-hand experience in managing classification systems, additional conclusions concerning operational and practical issues can be made. These conclusions in the form of managerial implications are being presented in the next chapter.

6. Managerial implications

Several managerial implications arise from the present findings. Those implications refer to the work being performed by operators of classification systems and are also relevant to other organizations that are directly or indirectly involved in star ratings such as governments or hotel associations.

First, the focus of a future-proof classification system should be less on buildings and facilities (the "hardware") and more on objectively assessing the service quality and the customer experience being offered to guests (the "software"). Second, a classification system should be easy to understand and to apply by both its main user groups: on the one hand providing guidance to **hoteliers** about maintaining and improving the standards they should adhere to now and in the future; on the other hand, managing the expectations of each **guest** choosing to stay at a hotel with a particular star rating. It should be clear to both hoteliers and guests what level of comfort and what kind of experiences a hotel with, let us say, three or four stars shall be offering.

Third, the need for classification systems to be as objective and as transparent as possible in their star ratings cannot be stressed enough. To prove their relevance, operators of those systems are expected to **objectively** assess a hotel's operations (including some highly intangible aspects) as opposed to the purely **subjective** ratings on guest-review platforms, a topic also discussed by Mayzlin *et al*. (2014). The objectivity must cover both the star-rating *criteria* (quality and operational standards that are clearly defined and straightforward to verify) and the star-rating *process* (e.g. on-site inspections with easy-to-use checklists), thus making the whole process more transparent for both main user groups.

Fourth, guest priorities change over time and star ratings should reflect this. Some hotel amenities such as lobbies or telephone switchboards have become less important, whereas guests are nowadays more concerned about sustainability, safety and security as well as cleanliness and hygiene, as has been repeatedly mentioned during the interviews (see also Hensens, 2016). Those changes are happening more frequently and more rapidly compared to the past, making the regular review of star-rating criteria and procedures an absolute necessity for classification system operators.

Fifth, technology plays a key role in accelerating those changes. Recent updates to star-rating criteria in part reflect the impact of mobile technology on the check-in procedure and in-room communication and entertainment, whereas the proliferation of guest-review platforms has amplified the ratings' focus on the customer experience, a development also highlighted by UNWTO (2014) and Hensens (2015).

Sixth, shifting guest priorities and technological advances have put pressure on system operators not only to frequently review and adapt star-rating criteria, but also to make the whole process more **flexible**. This is mostly achieved by introducing voluntary, points-based rating criteria to the classification procedure. Instead of forcing hotels to apply the same set of criteria in each star category, systems now allow for hotels to collect the needed points by adjusting their particular offerings (such as in-room amenities or guest services) to each establishment's concept, location and target market. By being more flexible, star-rating systems will better facilitate the growing diversity among hotels and become more accommodating to concepts such as boutique hotels, design hotels and lifestyle hotels.

Seventh, the position of classification system operators toward guest-review platforms has become less defensive than in the past. Whereas those platforms were initially seen as competitive to official star ratings (Hensens, 2015), interviewees nowadays consider them as complementary. Hensens (2015) correctly predicted that guest reviews will be utilized in various ways by official classification systems, a development already happening in a growing number of countries. This utilization may take the form of guest-rating integration in the overall rating algorithm, as a resource for preparing inspections or as an early warning for hotels with worsening guest satisfaction.

Eighth, official hotel classification is increasingly becoming voluntary and industry-driven, i.e. operated by an industry body and not a government agency, as has also been commented on by Blomberg-Nygard and Anderson (2016) as well as by Vagena and Manoussakis (2021). Thus, the need to convince hotels to pay for their star ratings has forced classification operators to become more agile and to quickly adapt to the hoteliers' and guests' changing needs. Monitoring those needs and regularly adjusting classification criteria has become the main survival strategy for classification systems.

Ninth, personal inspections will remain an essential part of star ratings in the foreseeable future, as interviewees do not consider self-assessment sufficient for an official classification.

Tenth, there is a marketing dimension inherent to star ratings that many classification system operators do not seem to fully appreciate (see also Narangajavana and Hu, 2008). As mentioned during interviews, hotels see their star ratings as a crucial marketing tool directly connected to their pricing policy. Upscale hotels, in particular, need to convince guests that despite higher room rates they offer great value for money as proven by their four-star or five-star rating. Operators can help by better communicating the high standards and the integrity of hotel classification to travellers, thus making star ratings more prestigious and recognizable.

Finally, cross-border cooperation in the field of star ratings is rapidly developing, as a growing number of countries are participating in joint classification systems. This development has been preceded by a prolonged period of discussing – but not implementing – a global star rating system (see WTO and IH&RA, 2004; Talias, 2016). The success of HSU shows that something that was unthinkable even a few decades ago is actually happening: the establishment of globally relevant hotel classification criteria. HSU has proven that a flexibly designed star-rating system can be applied even in countries with very different hospitality industries.

7. Limitations and further research

The present paper expands the limited academic research covering recent developments and the outlook of star ratings. By focusing on the views of the system operators, this paper provides an "insider" perspective which has been rarely explored in academic research, so far.

Thus, however, the present work reflects the opinions of the *administrators* but not of the actual *users* of the hotel classification systems. Users include *hotels* that choose or are obliged to be classified as well as *customers* relying on star ratings in their hotel selection process. The optimism of interviewees about the outlook of star ratings may be the product of their bias due to the job they perform and may not be shared by the aforementioned users.

Therefore, further research is needed to establish whether users of the classification systems share their administrators' optimism about the future of hotel classification and whether these systems actually reflect their users' needs and preferences. It would be particularly interesting to explore how hotels paying for their star ratings judge the value of their classification and the return on the money they spend for that purpose. Additional research could also be aimed at hotels choosing not to get classified, thus understanding the reasons behind their choice but also finding ways of convincing them to apply for a star rating.

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