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Research for TRAN Committee - European Tourism Labelling

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Abstract

This study focusses on the current situation in the European Union regarding quality and sustainability labelling in tourism. There is concern that the existing volume and variety of labels has become a barrier to consumer choice, which in consequence may lead to lost opportunities to increase the competitiveness of the European tourism industry. The study analyses the possibility of the introduction of an EU standard(s) for tourism services through the initiation of a harmonised EU certification system and the potential for the establishment of a single European tourism label.

CONTENTS

LIST OF ABBREVIATIONS

10YFP	10-Year Framework of Programmes on Sustainable Consumption and Production Patterns
ATUDEM	Tourist Association of Ski Resorts and Mountains of Spain
B2B	Business to Business
B2C	Business to Customer
B2G	Business to Government
CEHAT	Spanish Confederation of Hotels and Tourist Accommodation
CEPS	Centre for European Policy Studies
COSME Programme	EU Programme for Competitiveness of Enterprises and Small and Medium-sized Enterprises
CTR	Click Through Rate
DG-Growth	Directorate-General Internal Market, Industry, Entrepreneurship and SMEs
EC	European Commission
EETLS	European Eco-Tourism Labelling Standard
EMAS	EU Eco-Management and Audit Scheme
EP	European Parliament
EHQ	European Hospitality Quality scheme
ETC	European Travel Commission
ETIS	European Tourism Indicators System
ETQ	European Tourism Quality labelling
ETQL	European Tourism Quality Label
ETQP	European Tourism Quality Principles
EU	European Union
ISEAL	International Social and Environmental Accreditation and Labelling
ISO	International Organization for Standardization
GDP	Gross Domestic Product

GSST	Green Scheme of Slovenian Tourism
GSTC	Global Sustainable Tourism Council
GST-Criteria	Global Sustainable Tourism Criteria
HSU	Hotelstars Union
ICTE	Institute for Spanish Tourism Quality
LDC	Least Developed Countries
MICE	Meetings, Incentives, Conferences and Exhibitions
NGO	Non-Governmental Organisation
NTO	National Tourism Organisations
OTA	Online Travel Agent
RDMOs	Regional Destination Management Organisations
SCP	Sustainable Consumption Patterns
SDGs	Sustainable Development Goals
SIDS	Small Island Developing States
SME	Small and Medium Enterprises
SQD	ServiceQuality Germany
STB	Slovenian Tourist Board
STP	Sustainable Tourism Programme
STSC	Sustainable Tourism Stewardship Council
TFEU	Treaty on the Functioning of the European Union
UGC	User-Generated Content
UK	United Kingdom
UN	United Nations
UNEP	United Nations Environment Programme
UNWTO	United Nations World Tourism Organisation
USA	United States of America
USP	Unique Selling Proposition
WTTC	World Travel & Tourism Council

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EXECUTIVE SUMMARY

Background

This study focusses on the current situation in the European Union (EU) regarding quality and sustainability labelling in tourism. The purpose of labelling in the tourism sector is to improve signalling, reduce transaction costs, achieve coordination of participants' actions and avoid free riding opportunities generated by the incompleteness of the information. However, there is concern that the current volume and variety of labels has become a barrier to, rather than a facilitator of, consumer choice. Moreover, this situation may lead to lost opportunities to improve the competitiveness of the European tourism industry.

The aim of this study is to analyse the possibility of the introduction of an EU standard(s) for tourism services through the initiation of a harmonised EU certification system and to examine the potential for the establishment of a single European tourism label. To achieve this, the study has four key objectives:

- to summarise the current situation with regard to tourism labelling in the EU,

- to consider the possibility of coordination, reflecting on the costs and benefits of any action,

- to assess the need for a single EU tourism label, whether it is attainable and likely to improve the competitiveness of the EU tourism sector, and

- to recommend actions by the EU in promoting and supporting these, either through policy or directly.

Quality labelling

Quality labels are a well-established phenomenon within the tourism sector, particularly in hospitality, and they provide benchmarks for consumers purchasing decisions. Of the 28 EU Member States, only Finland does not have a nationally-accredited hotel quality label. However, desktop research for this study revealed that only eight of the Member States' National Tourism Organisations (NTO) promote at least one or more quality label through their website and only 13 of 50 countries on the European continent.

There is currently no system for registering quality labelling schemes in Europe and so no clear estimate of the number in existence. The study of the Centre for European Policy Studies (Renda et al, 2012) estimated that there are up to 100 labels related to quality, covering a wide range of aspects such as hospitality, culture, recreation, hygiene, and other tourism services. However, there is considerable fragmentation and diversity in the criteria applied, principles, management and governance of the labels. Just as with other types of labels, quality labels are susceptible to market saturation and as such, consumers may find it difficult to distinguish more reputable labels from others. This suggests that there is a poor understanding of the relationship between label attributes and service quality.

Sustainability labelling

There is increasing pressure for the tourism industry to become more sustainable and the development of a variety of labels to inform consumers that organisations are attempting to reduce the negative impacts of their activities has been noted for around three decades. Although there is evidence that sustainability is not currently a key factor in travel choice or experience for most individuals, there is some indication that a label may influence tourist behaviour whilst on-site.

The communication of a label's standards and the process of certification accurately, credibly and effectively to the market is a key factor in its success and represents a challenge to service providers. Achieving this is a challenge for the administration of sustainability labels, especially if they are a low priority for most tourists, as consumers may disregard the information presented.

As with quality labelling, the high number of labels is an issue in communication with tourists and it has been suggested that they should be reorganised into larger areas covered by a smaller number of labels. The main justification for this recommendation is that international tourists are unlikely to be as familiar with country specific labels as domestic visitors.

Overall, sustainability labels present several benefits (including reducing the negative impacts of tourism) and can lead to a harmonisation of stakeholder behaviour towards sustainable practice. However, there are still certain difficulties in implementing and monitoring these positive effects and setting the standards denoted by a label remains fraught.

Stakeholder consultation

Two surveys were undertaken as part of this study to gather opinions from key stakeholders across the European continent. The first was with key stakeholders such as national tourism associations, tour operator/travel agent associations, hotel/restaurant associations, NGOs and national/regional ministries. The second was with organisations issuing tourism labels, for both quality and sustainability.

There is broad agreement from both groups of respondents that labelling has two central benefits: (i) it is important for *consumer confidence/information* and (ii) it is an *incentive to improve quality/sustainability*. The majority in both groups are also receptive to some form of EU action to support tourism labelling. However, the degree to which they would like to see intervention in the market is less consistent, with the wider stakeholder group preferring a more comprehensive action whilst the labelling organisations have a greater preference for providing advice, assistance, networking, etc.

Although many recognise the conflict between some quality and sustainability criteria, there is support for a combined label, suggesting that this must be the longer-term goal if European tourism is to prosper. Whilst there is also support for the development of a European set of standards, many believe that this would be best achieved by adapting existing structures, such as the EU Ecolabel. However, the verification and certification process should be administered as locally as possible.

Case studies

This research presents ten case studies currently operating at global, European, and national levels. They have been chosen to reflect insights and best practices in relation to the development of a European label for tourism quality and sustainability. The purpose of the case studies was to highlight the successes and issues raised at the different levels of geographical coverage, as well as to demonstrate the different models of governance.

The analysis of the variety of labelling systems described in the case studies confirms that there are difficulties associated with the development and positioning of higher-level labels. It also proves that establishing a label can take time, but the support of national organisations can help to facilitate this. The use of flexible certification criteria also increases the number, type and size of business that can be included within a single label.

Conclusions

- Tourism certification and labels should be seen in the context of supporting wider EU policy commitments.

- Any EU initiative needs to reflect the complex and changing world of tourism quality and sustainability labels in Europe, for example, reflecting the growth of online ratings platforms.

- Moreover, the creation of a separate EU standard or umbrella label could be seen as duplicative given the existence of 'higher-level' labelling systems and standards in tourism already, so a clear European 'added-value' would need to be identified.

- European intervention is broadly welcomed but requires sensitive handling and should be directed towards providing support and coordination, as well as reliable and equivalent standards, rather than a new European tourism label. For example, the promotion of existing labelling systems, such Hotelstars Union and the EU Ecolabel.

- Quality labels for tourism must reflect the reality of user-generated ratings through online reviews for example, while supporting other approaches where appropriate. This approach is necessary for tourism businesses to understand that the impact of *traditional* quality measures, such as customer complaint handling, can have in improving online ratings.

- European level engagement in strengthening and coordinating tourism sustainability certification should build on established global standards and processes, such as Global Sustainable Tourism Criteria (GST-Criteria), to encourage participation in sustainable practice and support the achievement of sustainable development goals.

- Opportunities to strengthen integration between quality and sustainability in tourism should be pursued where possible. It is perceived as a natural evolution by many existing schemes, who have elements of both criteria, and it could reduce the number of labels.

- European level initiatives should recognise the need for certification schemes to foster local stakeholder participation and support. Greater participation will improve business performance in the sector and improve the overall competitiveness of EU tourism globally.

Recommendations

Although the study has revealed a level of support for EU action in tourism labelling, it is not unanimous. Therefore, the recommendations proposed below take a largely sequential approach that builds on existing capacity and structures to encourage the involvement of Member States, industry and other stakeholders in the actions.

Participation in tourism-labelling schemes should be voluntary and designed to encourage businesses to provide a product or service that is better than the minimum required by legislation. Given this, there is no necessity for new legislation or for the harmonisation of existing legislation. Indeed, such action may increase barriers to participation and may even discourage new participants in the industry.

The six recommendations of this study are:

1. The European Commission (EC) could set up an initial meeting with leading quality and sustainability schemes/labels and stakeholders in the EU and establish an ongoing working group.

2. The EC should enter negotiations with the Global Sustainable Tourism Council (GSTC) to establish a joint initiative to promote GSTC recognition of standards and accreditation of certification schemes, with European added-value.

3. The European Parliament (EP) and EC should encourage national tourism agencies and industry bodies to work together to strengthen and coordinate existing tourism quality labels in the EU.

4. Provide a promotional platform and a programme of on-going networking and support for quality and sustainability certification schemes and labels. This would probably be best supported by the EC Directorate-General Internal Market, Industry, Entrepreneurship and SMEs (DG-Growth), either directly or through the appointment of an external expert.

5. Promote local-level initiatives, such as campaigns promoting quality and sustainability labelling and supporting businesses in gaining certification. As with recommendation 4, this should be supported by DG-Growth.

6. EU institutions should require contracting of certified tourism businesses in EU procurement and project funding.

1   INTRODUCTION

1.1   Aims and objectives of the study

The World Travel & Tourism Council (WTTC) estimated that travel and tourism contributed 3.7% to the EU Gross Domestic Product (GDP) in 2016, directly supporting 5% of the workforce. With indirect impacts, this rises to 10.2% (GDP) and 11.6% (workforce) respectively. Globally, the tourism sector's growth was faster than the economy as a whole, which grew at 2.5%, meaning that for six consecutive years, the travel and tourism sector has outperformed the global economy (WTTC, 2017).

The latest tourism figures show that across the European continent there are gains of 8% in tourism arrivals from the previous year (UNWTO, 2017). Despite the geopolitical tensions and terror attacks since 2015, the region continues to prove resilient, and this growth is predicted to continue, excluding any serious safety or security incidents. Key intra-European source markets (UK, France, and Germany) continue to drive growth in arrivals in many destinations across the European continent. This is especially true for Eastern European countries, who have seen their arrivals increase as holiday makers seek out less popular destinations within European Union (EU) (e.g. Lithuania, Slovenia, Latvia). Iceland has seen a particularly large increase (29.9%) in travellers by maintaining its role as a hub for transatlantic travel, as both European and North American travellers have been increasingly breaking up transatlantic trips with some overnights in Iceland (ETC, 2017).

This growth is aided by increases in emerging markets such as China (19%) and Russia (27%), with increasing middle classes and recessions easing. This allowed a significant boost especially in visits to Turkey, over 26%, following the removal of a Russian ban on charter flights to the destination (ETC, 2017). Predictions for 2018 include an increase in the number of both Millennials[1] travelling internationally and in solo-travellers, and a greater focus on more cultural offerings, such as food, or on adventure, active and responsible tourism (Trekksoft, 2017). A focus on Pan-European promotion to highlight the wider variety of travel offerings will aid the continuing growth in visits.

There is some concern that the number and variety of tourism labels currently in operation in the EU with a diversity in sectorial scope, geographical coverage, governance, assessment methodology and evaluation criteria is presenting problems for the cross-border tourist, especially in the evaluation of quality and sustainability of tourism services. There is potential for this to impact negatively on the competitiveness of EU tourism through a lack of transparency in the market. The following sections seek to understand to what extent an EU certified label, or the harmonisation of standards, for quality and/or sustainability would improve the competitiveness of the EU tourism sector and help tourists make more informed choices.

The aim of this study is to analyse the possibility of the introduction of an EU standard(s) for tourism services through the initiation of a harmonised EU certification system and to examine the potential for the establishment of a single European tourism label. To achieve this, the study has four key objectives:

- To describe the current situation in the EU regarding quality and sustainability labelling.

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[1]   Millennials are the generation born between the early 1980s and early 2000s (although the dates used often vary) and the first that grew up with digital technology personal computers, mobile phones, etc.

- To analyse the possibility of harmonising labelling systems at an EU level and to identify the possible benefits and costs of doing so.

- To assess the extent to which a single European label for tourism is necessary, achievable and beneficial.

- To recommend possible actions by the EU either in supporting Member States to take action through policy or direct support.

In addressing these key objectives, the study focusses on several important questions:

- What are the key benefits of labelling schemes for: a) consumers, and b) tourism businesses?

- Are these better achieved at an EU, rather than national or regional level?

- Would a single tourism label raise the level of quality or sustainability in the EU?

- Is there support from stakeholders, i.e. tourism businesses, associations, etc., for an EU action?

- How should harmonisation of the standards for tourism services or a single EU label be organised? What would be its cost?

1.2   Methodology

The approach was split into five main tasks.

1. **Literature review**, which focussed on three main areas: academic literature; previous studies, reports and other related material; and grey literature. The literature was examined and evaluated for relevance and usefulness to the study, before being written up in the relevant sections.

2. **Review of policies and initiatives**, including the work of the European Parliament (EP), the European Commission (EC), other EU bodies and other organisations such as the UN World Tourism Organisation (UNWTO).

3. **Review of existing systems**, a desk based assessment was made of National Tourism Organisation websites to identify which tourism labelling systems (quality, sustainability or environmental) were being promoted, if any. A wider internet search was also undertaken for other labels, as well as of existing databases.

4. **Surveys of current quality/sustainability labels**, two online surveys were conducted:

   - the first one included key stakeholders from the EU Member States, such as national tourism associations, tour operator/travel agent associations, hotel and restaurant associations, NGOs and national/regional public authorities. This was undertaken in two phases, a largely closed question survey followed by an email to clarify issues revealed in the first phase;

   - the second survey was directed towards organisations issuing tourism labels for both quality and sustainability. These were identified through the previous tasks and responses to the first survey, where respondents were asked the names of labels they were aware of.

5. **Case studies**, ten cases were selected based on the data collected in the previous stages of the research and the knowledge or experience of the project team members. The cases were developed through a mixture of desk research, label websites, previous reports, etc., and direct contact with the organisations, either by email or phone.

1.3   Study definitions of quality and sustainability labels

This study examines as wide a range of labels as practicable, including both quality and sustainability (comprising environmental) labels.

For the purposes of this study, the following key characteristics and distinctions have been applied:

According to the International Organization for Standardization (ISO) and the International Social and Environmental Accreditation and Labelling (ISEAL) standards, the label should include the following **key characteristics:**

- use a standard with a set of defined requirements that go beyond legislation,
- operate according to a specified and continuous process of verification of compliance to the standard (conformity assessment),
- issue a certificate and a logo after assuring compliance (label),
- be operated by a certification or authorised body, and
- be voluntary.

There is some overlap in the criteria applied by different labels, but for simplicity, this study has used the following distinctions to categories the different types of quality, sustainability and environmental labels.

Quality labels focus on quality aspects, such as the training of all employees involved in the provision of services directly to consumers, the appointment of a quality coordinator, undertaking regular consumer satisfaction surveys and keeping records of actions taken under a cleaning and maintenance plan (according to the European Tourism Quality Principles, proposed by the EC in 2014). Quality labels include some management aspects, e.g. visitor satisfaction surveys, training of staff and provision of information to guests. Examples of quality labels include: European Hospitality Quality (EU label), Qualité Tourisme (French national label), Servicequalität Deutschland (German national label), Cyprus Tourism Quality (Cyprus national label), Tourism Our Passion (Swiss national label).

Sustainability labels focus on all dimensions of sustainable tourism, which include sustainable management, socioeconomic, cultural and environmental impacts (such as the consumption of resources, reducing pollution and conserving biodiversity and landscapes), according to the Global Sustainable Tourism Criteria (GST-Criteria). Some sustainability labels also include quality management aspects. Examples of sustainability labels include: TourCert (global label), Travelife (global label), Green Globe (global label), Ecotourism Ireland (Irish national label), Eco-Romania (Romania's national Ecotourism label).

Environmental labels focus on environmental aspects, primarily comprising environmental management, energy and water consumption, waste and waste water treatment, emissions and noise, as well as biodiversity aspects (according to International Organization for Standardization - ISO). These environmental labels cover the environmental dimension of wider sustainability labels. Examples include: European Ecolabel (EU label), Austrian Ecolabel (national label), Legambiente Turismo (Italian national label), Nordic Swan (recognised in Scandinavia).

For this study, the following global definitions for *certification* and *label* have been applied:

Certification is a mechanism for ensuring that an activity or product meets certain standards that may be set by government or agreed within an industry sector. In tourism, certification is used primarily to check on the activities and standards of tourism enterprises, such as accommodation providers, to ensure consumer safety and satisfaction. However, it may also be extended to cover sustainability issues. The key components of certification include:

- Voluntary participation by businesses;

- Well defined criteria and standards;

- A process of auditing and assessment;

- Recognition of those who meet the criteria, through a label or logo;

- Follow up, in due course, to check continued compliance.'
  (UNEP/UNWTO, 2005 p. 102)

According to this definition the terms *certificate* and *label* are used synonymously/interchangeably and both stand for certification programs, which certify the compliance of a business, or destination with an environmental, sustainability or quality standard and which make this compliance visible through a label (or logo). In this sense, they are also used in this study.

A certificate or label may offer a number of *certification schemes* to cover different sectors within the tourism industry, e.g. TourCert offers three schemes covering tour operators, accommodation and other tourism businesses.

Standards refer to the sets of criteria used in certifying or labelling a business, organisation or destination.

1.4   Structure of the study

The remainder of the report is set out in the following way. Chapter 2 looks separately at the issues surrounding quality and sustainability labelling in tourism, including a review of the most recent literature and an overview of the current situation. Chapter 3 presents an examination of policy and practice, and summarises a previous consultation and study into tourism labelling in the EU. Chapter 4 presents the analysis of the responses to the two surveys with stakeholders and labelling organisations conducted for the purposes of this study. The next Chapter presents ten case studies illustrating best practices in tourism labelling at global, European and national level. Finally, Chapter 6 presents the conclusions and recommendations of the study.

2 QUALITY AND SUSTAINABILITY LABELLING IN TOURISM

KEY FINDINGS

- **Quality and sustainability labels are a well-established phenomenon within the tourism sector** in the EU, particularly in hospitality. However, consumers **often poorly understand how the label attributes are reflected in service provision**.

- **The communication and marketing** of a label **is key to** its utility to **both businesses and consumers.**

- There are up to 100 quality and 159 environmental and sustainability labelling schemes on the European continent. **The quantity, scope and scale of tourism labels has resulted in significant fragmentation of the market and in inconsistency of criteria. Market penetration is low for all types of tourism labelling schemes, typically less than 1%,** which means that only a small percentage of tourism businesses are registered with a certificate.

- **There has also been a significant growth of online platforms where User-Generated Content is utilised to create ratings.** This impacts particularly quality labels where subjective assessments of quality are challenging the traditional service provision criteria.

- Tourism labels for either quality or sustainability are not extensively promoted by national tourism organisations on their websites.

- Sustainability is not thought to be a significant factor in travel choice, but some evidence exists to suggest that a label may influence tourist behaviour whilst on holiday.

- **A European set of indicators aligning existing EU labels for environmental and sustainable tourism with the GST-Criteria and focusing on the special strengths and requirements of European tourism could support these labels** in identifying the strengths of 'European' accommodation businesses and campsites, to **give them a greater visibility and to support their competitiveness.**

2.1 The purpose of tourism labelling

The rationale for labels in the tourism sector is threefold:

- **Protecting** consumers to ensure the rights of tourists, as well as fair trade, competition, and accurate information in the marketplace.

- **Signalling** to tourists, in order to attract tourist demand towards establishments complying with specific quality, sustainability or environmental requirements.

- **Coordinating** the actions of the scheme's participants, for example by promoting compliance with certain minimum requirements.

The public sector has promoted labels as a means of correcting market deficiencies in the tourism sector, particularly in signalling and coordination. However, to some extent, since the growth of the online platforms (such as Airbnb, TripAdvisor and many others), this is no longer the case as the platforms provide information (signalling) and coordination (to the consumer) at no cost for the businesses. This raises two important questions for this study:

1. What is the added-value of a harmonisation of standards for tourism services at EU level in terms of more transparency and standardisation?

2. If there is some value, is there a possible cooperation between industry stakeholders and EU or national tourism institutions?

Labels fall into two categories: either mandating specific standards and procedures, or facilitating compliance with wider obligations (with the final aim of helping tourists in their decision making and ensuring standards of service). These labels are generally voluntary in nature, command a fee from the certified organisation or destination (Geerts, 2014) and are the result of a process that assesses and provides an assurance that a product, process, service, or management system conforms to specific requirements and norms (Black and Crabtree, 2007, p. 52).

The value of labels as a factor in consumer choice appears to be unclear and depends on the public profile of the label, which may not be prominent (Penz, Hofmann and Hartl, 2017; Mulej, Lebe and Vrečko, 2015; Zielinski and Botero, 2015). Communication of a label's credentials is therefore seen as a key attribute in its overall utility and success in consumer markets (Penz, Hofmann and Hartl, 2017; Nelson and Botterill, 2002).

The issue of the high number of labels has been addressed by a number of studies (Geerts, 2014) both as a demonstration that they are a popular way of signifying sustainability (Minoli, Goode and Smith, 2015; Cerqua, 2017; Tepelus and Córdoba, 2005), but also as evidence that there are too many of them and they should be rationalised into larger areas (supra-national, continental or global) covered by a smaller number of labels (Geerts, 2014; Jarvis, Weedon and Simcock, 2010; Buckley, 2002). One study also concluded that international tourists are less likely to be familiar with country specific labels as domestic visitors (Geerts, 2014), and that this situation was exacerbated by the saturation of labels in certain countries.

2.2   Quality labelling and certification

Quality labels are a well-established phenomenon within the tourism sector worldwide, particularly in hospitality, and they are intended to provide benchmarks on which consumers can make purchasing decisions (Kozak and Nield, 2004). Generally, there is a shortage of literature on the role and impacts of tourism quality labels as a specific, discrete entity. This study found only 13 National Tourism Organisations (NTO) in the EU and neighbouring countries[2] that promote at least one quality label on their websites: a finding confirmed by Zielinski and Botero (2015) who note that in today's climate, tourism labels tend to focus on issues of sustainability (also Font, 2002). However, of the 28 EU countries, only Finland does not have a nationally-accredited hotel quality label (Núñez-Serrano, Turrión and Velásquez, 2014), which suggests that although they are widespread, quality labels are not actively promoted by many NTOs.

Indeed, the concept of quality can be seen to vary, not only from place to place (Núñez-Serrano, Turrión and Velásquez, 2014), but also because of information asymmetries (Nicolau and Sellers, 2010). The consumer cannot fully understand the quality of a service provision due to its intangibility (it is only truly perceived during consumption, unlike with tangible products). As such, it has also been noted that there is little or no correlation between consumers' perceptions of quality and their knowledge of a specific site's quality label (Lucrezi and Saayman, 2015). However, Bilbao and Valdés (2016) noted that there is an increase in potential profitability where properties hold a quality label. Furthermore, just as with other types of labels, quality labels are susceptible to market saturation and as such consumers may find it difficult to differentiate more reputable labels from others (Mulej, Lebe

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[2]   50 NTO websites from the European continent were checked. Additionally, 10 global NTO websites were checked with only one quality label being identified: QualMark in New Zealand.

and Vrečko, 2015; Nicolau and Sellers, 2010). This suggests that there is a poor understanding of the relationship between label attributes and service quality by consumers.

The issue of what constitutes quality and how it is measured and assessed is a key problem. Peri and Rizzo (2012) suggest that designing the process to award a label may require the involvement of multiple organisations and individuals. This would increase the pool of knowledge and expertise (Kozak and Nield, 2004), but it may also increase the potential for greater bureaucracy or disagreement.

2.2.1   Quality labelling in the EU

Currently, there is no database on quality labelling schemes in the EU. Based on the Centre for European Policy Studies (CEPS) study for the EC (Renda et al., 2012) described in Section 3.7 in more detail, it is reasonable to estimate that there are up to 100 labels related to quality in the EU, covering aspects such as culture, recreation, hygiene, and other elements along the quality value chain. Quality labels have been created in the tourism sector both by public authorities and by private organisations, Renda et al. (2012) identified six types of scheme from their sample, certifying either the whole of the tourism sector or specific sub-sectors. Table 1 below shows that privately run schemes tend to cover specific tourism sub-sectors, whilst those with public involvement are more likely to cover all tourism sub-sectors.

Table 1: Scope of private and public quality labelling schemes

Tourism sectors covered	Privately run schemes	Publicly run schemes	Private/Public partnership schemes
All sub-sectors	13%	23%	18%
Specific sub-sectors	33%	3%	10%

Source: Adapted from Renda et al. (2012)

The result is not only fragmentation and diversity, but also inconsistency in criteria, principles, management and governance modes. There are two broad approaches to quality assessment: either self-assessment, with lower costs but less credibility, or third-party assessment, which is more robust and credible but with higher costs and generally lower market penetration. Some schemes prefer to award a simple accreditation (based on the attainment of a minimum standard), whilst others have incremental systems based on higher quality (e.g. stars, roses, etc.).

According to Renda et al. (2012), most quality schemes are run by firms or business associations acting in the tourism industry. Their main goal is supporting the development and promotion of a standard and the creation of a professional network. Industry-led quality labels tend to be business (supply-side), rather than market oriented (demand-side) and consequently seen as a business tool. They have been used to introduce quality processes within small businesses, such as customer complaints handling, staff training and maintenance procedures. They also tend to be used as an audit, to identify practices that are not effective. There is currently an App under development to coach hotel managers (please see https://travelappeal.coach/ for further details). In contrast, public labels, which are run by national and/or regional government and public agencies in charge of promoting national or regional tourism, are intended to create useful information channels for tourists.

According to Renda et al. (2012), 28% of quality labels relate to the accommodation sector, giving it the most widespread coverage. This is followed by transportation and restaurants (21%) and tourist attractions, such as museums and theme parks (15%).

Given the fragmentation and the lack of accessible information, it is not possible to estimate with any degree of precision the effective rate of penetration[3] of each label in the tourism industry at national or regional level. However, for the purposes of this study it has been estimated that *Calidad Turística - Q Label*[4] has a 0.5% penetration rate. The label has been operating for more than 15 years in one of the largest European tourism destinations and has been a model for many of the quality labels across European continent. At present, there are 2,013 establishments certified with the label in 23 sub-sectors out of a potential 400,000 businesses (CaixaBank, 2017). This clearly shows the challenges in designing a label for the whole tourism sector, given the scope and scale of businesses within the industry, which meets the needs of consumers and adds value for businesses.

It is possible to identify some general trends in the criteria for quality labelling. These tend mainly to concern services provided rather than organisational issues, with customer satisfaction surveys seen as very important in improving quality standards. Human resource policies are also seen as a significant element of the criteria for quality labelling. Furthermore, there has been a substantial growth in the utilisation of User-Generated Content (UGC) by online platforms[5].

2.2.2 Online booking and tourism quality

The ratings displayed on online platforms are predominantly generated by feedback from consumers, which tend to be the subjective opinions of the reviewers, as against the more objective measurement of services in the traditional quality certification systems. However, the growth in travel related information available online has changed how tourists research and book their travel. "*Before making an online hotel reservation, consumers visit on average almost 14 different travel-related sites with about three visits per site, and carry out nine travel-related searches on search engines*" (UNWTO, 2014 p. 6). The final selection of hotel is often based on previous customer reviews after an initial filtering using the traditional classifications. This suggests that the evolution of UGC is having a twofold impact; firstly, in helping consumers to evaluate and to make better choices, and secondly in supporting businesses with marketing.

There is some consensus, among suppliers and consumers, that an integration of guest reviews with traditional classification systems (using the reviews to provide a check on the quality of the amenities that are specified in the classification systems), could result in the development of a robust system (UNWTO, 2014). A likely scenario is that UGC will be further used to support businesses in improving services. There are also examples of destination marketing organisations actively engaging with these platforms, for example, in the UK, *Visit Cheshire* (http://www.visitcheshire.com/stay) uses TripAdvisor to generate its ratings and reviews.

It is difficult to determine what the long-term impact will be of online platforms' ratings on existing quality labelling. Whilst platform owners (such as the OTAs and TripAdvisor) make good and effective use of the data generated and the use of the online content increases, it is likely that the current situation will consolidate. At present, there is only one foreseeable complication, the introduction of new regulations on the ownership and use of data. However, at this point it is still too early to make further conclusions.

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3   The penetration rate is the percentage of businesses registered with a certificate.
4   For more details, please see the Calidad Turística case study in Section 5.3.3.
5   Please see the case study in Section 5.1.1 on TripAdvisor and Booking.com for more detail.

2.3 Sustainability labelling and certification

2.3.1 30 years of sustainable tourism labelling

The first labels for environmentally friendly tourism services appeared in 1987/88 with the *Blue Flag* for beaches and the *Siverthistle* for accommodation businesses in Kleinwalsertal, Austria. By 2000, around 60 such certificates and labels were offered in tourism around the world. Currently, 231 national and international labels are listed on the *Tourism 2030* (2017) - a knowledge-networking platform for sustainable and responsible tourism (DestiNet.eu). It is estimated that between 40,000 and 50,000 tourism businesses and services worldwide, about 1% of all tourism businesses, are certified by these labels.

Sustainability labels can cover a number of different characteristics or practices, including:

- the unique characteristics of a location (Nelson and Botterill, 2002),
- the need to protect vulnerable landscapes, ecosystems, environments (Blackman et al., 2014; Nelson and Botterill, 2002),
- the specific organisational behaviours (Duglio and Beltramo, 2016; Mulej, Lebe and Vrečko, 2015),
- the quality of environmental amenities (Cerqua, 2017, p. 1159), or
- the designation or branding of an entire region as sustainable, such as certain Swiss Alpine regions (Boesch, Renner and Siegrist, 2008).

The scope of sustainability labels is extensive and so any potential impacts could be spread across a multitude of sub-sectors of the tourism industry. Overall, such schemes can be said to attempt to increase the amount of information available to consumers whilst also endeavouring to increase sustainability standards (Blackman et al., 2014). However, Zielinski and Botero (2015) suggest that although labels are useful in denoting certain sustainability characteristics of a site, they may not actually improve standards.

As well as providing information about the sustainable practice of a business or destination, labels have a secondary purpose as a marketing tool (Zielinski and Botero, 2015; Nelson and Botterill, 2002). Achieving this is seen as a particular challenge for the administration of sustainability labels (Geerts, 2014), as sustainability is in fact a low priority for a majority of tourists (Penz, Hofmann and Hartl, 2017; Mulej, Lebe and Vrečko, 2015), consumers may disregard the information presented by certified organisations or the labels themselves. This may be due to a difficulty in attaining agreement between key stakeholders about what those standards should represent (Zielinski and Botero, 2015) or the requirement for specific infrastructure, which may be beyond the resources of smaller rural locations (Nelson and Botterill, 2002).

Furthermore, environmental labels have attracted accusations of greenwashing[6] (Geerts, 2014), where organisations are more concerned with promoting perceptions of sustainable practice, to the detriment of actual practice, or provide information of low credibility (Tepelus and Córdoba, 2005). The accurate, credible and effective communication of labels' standards and processes to the market is a key factor in its success and represents a challenge to service providers.

Whilst there is a general consensus that sustainability is not a factor in travel choice or experience for a majority of individuals, some evidence exists to suggest that a label may

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[6] Greenwashing is the practice of making unfounded claims about the environmental benefits of a product or service that can make a business appear to be more sustainable or environmentally friendly than it is.

influence tourist behaviour whilst on-site (Penz, Hofmann and Hartl, 2017; Juvan and Dolnicar, 2016). Some destinations, including Costa Rica (Tepelus and Córdoba, 2005) and the EU (Hamele, 2002), have taken a strategic interest in sustainable tourism and the use of certification, not only to develop the industry in a sustainable manner, but also to change the behaviour of visitors (Tepelus and Córdoba, 2005). Jarvis, Weedon and Simcock (2010) note the difficulty of ascertaining the true effect of sustainable tourism on the day-to-day activities of tourists, and so currently the longer-term effect of the promotion of sustainable tourism through labels is unclear, just as the existence of the sustainable tourist remains controversial (Juvan and Dolnicar, 2016; Pulido-Fernández and López-Sánchez, 2016).

Overall, labels in these fields present a number of benefits including reducing the negative impacts of tourism such as pollution, waste and over-use of resources, and can lead to a harmonisation of stakeholder behaviour towards sustainable practice in particular. However, there are still certain difficulties in implementing and monitoring these positive effects, and it can be observed that setting the standards denoted by a label remains fraught.

2.3.2 Worldwide labels

In 2017, there were 45 global[7] sustainable tourism labels operating on the European continent. Another 186 labels are operating at either continental, national or sub-national levels: 10 in Africa, 3 in Asia[8], 12 in Oceania/Pacific[9], 47 in the Americas, and 114 on the European continent. Together with the global labels, a total of 159 environmental and sustainability certificates and labels are offered to tourism businesses, services and destinations on the European continent. This means that 69% of all sustainability and environmental label are operating on the European continent at some level.

Some of the certificates and labels are offered to all types of tourism businesses and destinations, but most focus on hotels and other types of accommodation. There are estimated to be almost 17,000 certified businesses on the European continent.

2.3.3 Trends and developments

There is increasing pressure for the tourism industry to become more sustainable (Penz, Hofmann and Hartl, 2017; Karlsson and Dolnicar, 2016; Minoli, Goode and Smith, 2015; Tepelus and Cordoba, 2005; Hamele, 2002). The development of a variety of labels to inform consumers and other stakeholders that specific sites are attempting to reduce the negative impacts of tourism has been noted for around three decades (Christian, 2017; Zielinski and Botero, 2015; Blackman et al. 2014).

Originally developed for hotels and beaches, there are now environmental and sustainability certifications for all types of tourism businesses and destinations. In addition to the original environmental objectives, many of their standards also encompass social, cultural and economic objectives.

The certificates range from small schemes with less than fifty businesses to international labels with 10,000 or more certified businesses. Most certification systems are a cooperation between public and private organisations; however, some are solely public or private labels and certifications. The development and launch of certification systems is often publicly funded or subsidised, with the majority of certification systems experiencing financial difficulties following this supported phase due to a low market penetration. Relatively few systems are financially sustainable through subscription alone.

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[7]   Operating in at least two global regions, e.g. European continent and Latin America.
[8]   Japan, Thailand and Vietnam.
[9]   There are 11 sustainable tourism labels in Australia and one in New Zealand.

Most systems seek to cover some of their costs through examination fees and certification charges. Annual fees ranging from €100 for a small business, to €10,000 for a destination. Few labels are offered free of charge. In addition to the auditing and certification, some systems offer training courses in preparation for certification and marketing support. Most labels have a system of independent on-site auditing of businesses. Relatively few limit their examination to random sampling or to desk-based document checks. With few exceptions, most certificates openly publish their standards, with criteria and guidelines, on the internet.

As indicated in Section 2.3.2., some 17,000 tourism businesses on the European continent (representing only 1% of the market) have some form of *green* certification. Because of this low market penetration, labels have a poor visibility within their target groups. On average, the degree of recognition is less than 10%. Since the establishment of the GSTC, the interest in marketing green offers by travel agencies, online booking portals and tourism organisations has increased slightly.

Environmental and sustainability certification systems show the feasibility of certain measures while at the same time maintaining or even strengthening competitiveness. Certified enterprises are often winners of competitions and so-called best practice examples. They provide data for monitoring and, if necessary, they can constitute a good basis for the formulation and acceptance of legislation. Thus, for example, the energy and water consumption values of 400 environmentally certified businesses from '*Environmental Performance of European Tourism Companies*' (Hamele and Eckardt, 2006) were included in the study on '*Best Environmental Management Practice in the Tourism Sector, Learning from Frontrunners*' (Styles, Schönberger and Galvez Martos., 2013).

2.3.4   Reactions to the label flood: from Mohonk to GSTC

In response to the increasing number of certificates and the associated risk of confusion and misuse (e.g. greenwashing), around 35 organisations and experts met in Mohonk (USA) in 2000 and agreed on the key requirements for credible certificates. The result was a proposal for an International Certification Program for Sustainable Tourism and Ecotourism (Mohonk Agreement, 2000).

The EU VISIT Initiative, co-financed by the LIFE programme from 2001-2004, together with 12 leading certificates developed a minimum standard and started marketing initiatives. Parallel to this, the 'Sustainable Tourism Task Force' was instigated by the United Nations Environmental Programme (UNEP) as a follow up to the Earth Summit in 2002 and as part of the so-called Marrakech Process[10].

The Task Force developed the concept of a *Sustainable Tourism Stewardship Council*, which should examine and recognise environmental and sustainability certificates in tourism worldwide and support the mainstreaming of sustainable tourism. In 2008, the Sustainable Tourism Stewardship Council (renamed the **Global Sustainable Tourism Council (GSTC)** in 2010), was registered as a Non-Governmental Organisation (NGO) in the USA and developed the Global Sustainable Tourism Criteria (GST-Criteria) for hotels and tour operators.
Based on the GSTC guidelines for the *Testing of Standards and Certificates for Sustainable Tourism*, 33 standards and three certifications with associated test procedures, have now been approved. To ensure its own credibility, the GSTC is now seeking full membership of

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[10]   Please see the website: https://esa.un.org/marrakechprocess/tfsustourism.shtml for more information on the so-called Marrakech Process.

the ISEAL Alliance[11], the global organisation for sustainability standards. To achieve this, the internationally recognised ISEAL principles for credibility must be met.

In the EU, the **European Eco-Tourism Labelling Standard (EETLS)** has been developed. The EETLS combines the GST-Criteria with a detailed set of practical indicators and the markers of the EU Ecolabel for tourist accommodation and campsite services. It is supported by a handbook, and by online self-assessment and training tools.

2.3.5   Transparency and marketing

Just as important as credibility (for example, through international recognition) is the marketing of certificates and their certified businesses as the better choice. Sustainable tourism will only become mainstream, when consumers can easily find this information and it is credible. Currently there is little consumer take-up.

In 2017, more than 40 international and national labels were certifying the environmental and sustainability performance of accommodation providers and campsites worldwide with almost 17,000 certified businesses on the European continent (as presented in Table 2 below). Of those, 12 labels were operating on a global, 9 on a European and 21 on a national level. What is more, 11 labels were applying a GSTC-Recognised standard and two systems were GSTC-Accredited (please see explanations below Table 2 to find out the difference between GSTC-Recognised and GSTC-Accredited). These labels already share a range of criteria, but also have differences in the specification of their criteria and indicators due to the diversity of contexts in Europe. A European set of indicators aligning with the GST-Criteria and focusing on the special strengths and requirements of European tourism could support these labels in identifying the strengths of 'European' accommodation businesses and campsites, to give them a greater visibility and to support their competitiveness.

Table 2: Sustainable tourism labels in Europe for accommodation and camping in 2017

Name of the label	No. certified in Europe (estimated)	GSTC-Recognised	GSTC-Accredited
GLOBAL	**9,598**	**8**	**2**
Biosphere Responsible Tourism	30	1	1
EarthCheck	150	1	1
eco hotels certified	115	-	-
Green Globe	150	1	-
Green Growth 2050 - Travel Beyond	15	1	-
Green Key	1,500	1	-
Green Pearls Unique Places	50	-	-

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[11] The International Social and Environmental Accreditation and Labelling (ISEAL) Alliance was founded in 2002 to strengthen sustainability standards for the benefit of people and the environment. Its membership is open to all multi-stakeholder sustainability standards and accreditation bodies that demonstrate their ability to meet the ISEAL Codes of Good Practice and accompanying requirements, and commit to learning and improving.

Green Tourism	1,200	-	-
GT Active	33	1	-
TourCert	5	1	-
Travelife	350	1	-
TripAdvisor Green Leaders Program	7,000	-	-
EUROPEAN	**2,946**	**-**	**-**
BioHotels	90	-	-
Blaue Schwalbe	100	-	-
Certified Green Hotel	107	-	-
ECEAT Quality Label	1,300	-	-
ECOCAMPING	240	-	-
European Ecolabel for tourist accommodation and campsite services	789	-	-
Green Brands	10	-	-
GreenSign	60	-	-
Nordic Swan	250	-	-
NATIONAL	**3,904**	**3**	**-**
Austrian Ecolabel for Tourism	220	1	-
Bio-Siegel Germany	100	-	-
David Bellamy Conservation Award, UK	587	-	-
DEHOGA Umweltcheck, Germany	88	-	-
ECO Certification, Malta	22	1	-
écogîte France	644	-	-
Ecolabel Czech Republic	9	-	-
EcoLabel Luxembourg	40	-	-
Eco-Lighthouse, Norway	1,200	-	-
Eco-Romania	45	-	-
Ecotourism Norway	1	-	-
Gites Panda, France	227	-	-
Green Certificate, Latvia	89	-	-

Green Choice, Greece	7	-	-
Green Star Certificate, Turkey	121	-	-
HI Quality & Sustainability Certification, Iceland	3	1	-
ibex fairstay, Switzerland	57	-	-
Legambiente Turismo, Italy	300	-	-
Slovenia Green	14	-	-
Small and family run "ECO Hotels", Croatia	4	-	-
VIABONO, Germany	126	-	-
TOTAL	**16,684**	**11**	**2**

Source: Collated for this study by Herbert Hamele, ECOTRANS (2017)

The differences between GSTC-Recognised and GSTC-Accredited are:

GSTC-Recognised means that a sustainable tourism standard has been deemed equivalent to the GST-Criteria for sustainable tourism and is administered by a standard owner that meets GSTC requirements. This designation is made by GSTC's independent Accreditation Panel. This means that the GSTC has verified that the standard aligns with the GST-Criteria and that any additional clauses do not contradict GST-Criteria requirements. GSTC-Recognised does NOT mean that the Certifying Body using the standard is accredited. This designation relates only to the words included in the standard, and NOT how the standard is applied (https://www.gstcouncil.org/certification/achieve-gstc-recognized/).

GSTC-Accredited[12] means that a certification program is using a GSTC-Recognised standard and is following processes and procedures that have been reviewed and approved by the GSTC's Accreditation Panel. Businesses certified by an accredited certification program can also use the GSTC certified language and logos and can expect favourable positioning in the market place, among other benefits. In broad terms, it means that the GSTC has recognised that the standard used for certification is aligned with the GST-Criteria (GSTC-Recognised) and that the certification procedures largely meet international standards for transparency, impartiality, and competence. The accreditation process is carried out externally by Accreditation Services International on behalf of GSTC.

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[12] The GSTC-Accredited system replaced the previous GSTC-Approved mechanism. A simplified version of GSTC-Accredited is available to certification schemes that operate in just one country, which is administered by the GSTC internally based on a secondary accreditation manual that is made available on application.

3 POLICY AND PRACTICE IN TOURISM LABELLING

KEY FINDINGS

- In 2015, the **United Nations (UN) set out 17 Sustainable Development Goals (SDGs) and the EC has committed to implement them** both in its internal and external policies.

- EU's practices with setting standards for environmental and sustainable tourism can be traced back to 1993, when **Eco-Management and Audit Scheme (EMAS) was introduced by the EC as a first step towards fulfilling the EU goal of sustainable development.**

- The Treaty of Lisbon (2009) allowed the EU to 'carry out action of support, coordinate or supplement the actions of the Member States' at a European level and for the first time it included tourism.

- **Consultations conducted by the EC in 2011 and the Centre for European Policy Studies in 2012 have reported considerable support for a European tourism quality label.** The main perceived benefits of an EU level scheme were improved customer perception and greater market visibility of the businesses.

- A proposal for a set of voluntary European Tourism Quality Principles (ETQP) was published by the EC in 2014, however it was withdrawn within 13 months due to a lack of support from the Member States.

3.1 Introduction

This chapter of the study gives an overview of the key policies on tourism labelling, focussing on the activities of the UN, as well as of the EC in this field. Furthermore, the existing EU schemes for monitoring tourism and its impacts are described and summaries of consultation exercises into tourism quality labelling undertaken by the EC in 2011 and 2012 are presented. However, it is worth underlining that after briefly introducing a set of voluntary European Tourism Quality Principles in 2014 (see Section 3.3 below), which were withdrawn early the following year, no major action by the EC in this area has been taken.

3.2 UN Sustainable Development Goals in tourism

In 2015, the UN set 17 **Sustainable Development Goals (SDGs)** as part of the **2030 Agenda for Sustainable Development**. Whilst all are likely to impact in some way on travel and tourism development, the United Unions World Tourism Organisation (UNWTO) places particular emphasis on Goals 8, 12 and 14:

Goal 8 - Promote continued, inclusive and sustainable economic growth, full and productive employment and decent work for all.

Tourism is one of the driving forces of global economic growth, and currently accounts for one in 11 jobs worldwide. By giving access to decent work opportunities in the tourism sector, society - particularly youth and women - can benefit from enhanced skills and professional development. The sector's contribution to job creation is recognised in target 8.9 ***"By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products"***.

Goal 12 - Ensure sustainable consumption and production patterns.

A tourism sector that adopts Sustainable Consumption and Production (SCP) practices can play a significant role in accelerating the global shift towards sustainability. To do so, as set in Target 12.b, it is imperative to ***"Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products"***. The Sustainable Tourism Programme (STP) of the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns (10YFP) aims at developing such SCP practices, including resource efficient initiatives that result in enhanced economic, social and environmental outcomes.

Goal 14 - Conserve and sustainably use the oceans, seas and marine resources for sustainable development.

Coastal and maritime tourism, tourism's biggest segments, particularly for Small Island Developing States (SIDS), rely on healthy marine ecosystems. Tourism development must be a part of integrated Coastal Zone Management in order to help preserve fragile ecosystems and serve as a vehicle to promote the blue economy. Therefore, tourism development should, in line with Target 14.7: ***"By 2030 increase the economic benefits of SIDS and LDCs*** [*Least Developed Countries*] ***from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism"*** (UNWTO, n.d.).

Figure 1: UN Sustainable Development Goals

Source: UNWTO (n.d.). Retrieved from http://icr.unwto.org/content/tourism-and-sdgs

The EC has committed to implement the SDGs both in its internal and external policies. In November 2016, it issued a press release setting out its priorities for sustainable development in the EU. These are set out in:

- A Commission Communication[13] on the next steps to be taken to achieve a sustainable future for the EU, describing the potential contribution of various EU policies and legislation in supporting the SDGs.

- A proposed revision of the European Consensus on Development[14] for discussion with the Council and EP.

- A Commission Communication[15] on a renewed partnership with African, Caribbean and Pacific countries.

3.3   EU tourism policy on quality and sustainability

Since early 2000s, there has been a number of policy communications published by the EC, which reflected the EU tourism policy priorities and objectives. These included:

- The 2001 Communication on '*Working together for the future of European tourism*'[16]- this acknowledged the major challenges facing the industry, which required training to upgrade skills, the sustainable development of transport and environmental protection, and the adoption of new ICT in order to improve its competitiveness.

- The 2003 Communication on a '*Basic orientation for the sustainability of European tourism*'[17] advocated the strengthening of sustainable tourism across the EU by giving consideration to social issues.

- The 2007 Communication entitled '*Agenda for a sustainable and competitive European tourism*'[18], which proposed a medium-term strategy for a sustainable and competitive European tourism, linked to the EU's revised Lisbon Strategy for Growth and Jobs (Centre for Strategy & Evaluation Services (CSES), 2013).

The entry into force of the Treaty of Lisbon in 2009 allowed the EU to "carry out actions to support, coordinate or supplement the actions of the Member States" at a European level, which for the first time included tourism (Article 6(d), Treaty on the Functioning of the European Union). Whilst having regard for the principle of subsidiarity, it allowed the EU to support Member States' actions by promoting the competitiveness of the industry.

In June 2010, the EC adopted **a new consolidated political framework for tourism**, outlined in its Communication "Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe (COM(2010) 352 final)" (EC, 2010). In this document, four priorities for action were identified:

1. To stimulate competitiveness in the European tourism sector.

2. To promote the development of sustainable, responsible, and high-quality tourism.

3. To consolidate Europe's image as a collection of sustainable, high-quality destinations.

4. To maximise the potential of EU financial policies for developing tourism.

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[13] Commission Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions '*Next steps for a sustainable European future - European action for sustainability'* (SWD(2016) 390 final).

[14] Commission Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Proposal for a new European Consensus on Development 'Our World, our Dignity, our Future' (SWD(2016) 387 final), (SWD(2016) 388 final) and (SWD(2016) 389 final).

[15] Joint Communication to the European Parliament and the Council '*A renewed partnership with the countries of Africa, the Caribbean and the Pacific'* (SWD(2016) 380 final) and (SWD(2016) 381 final).

[16] Commission Communication to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions '*Working together for the future of European tourism*'.

[17] Commission Communication to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions '*Basic orientation for the sustainability of European tourism*'.

[18] Commission Communication '*Agenda for a sustainable and competitive European tourism*'.

In support of priority 2, it proposed to develop a new European brand, Qualité Tourisme, based on existing national practice, reward high standards of customer service in the industry and improve consumer confidence and satisfaction. In 2014, the EC published a set of voluntary European Tourism Quality Principles, which covered four main areas: staff training, consumer satisfaction, cleanliness and maintenance, and finally correctness and reliability of information (EC, 2014). However, these were withdrawn in March 2015 due to lack of support from the Member States.

In adopting its resolution "New challenges and concepts for the promotion of tourism in Europe" (P8_TA(2015)0391), the EP supported the development of a 'destination promotion and brand strategy' to enable 'European destinations to distinguish themselves from other international destinations' by 'strengthening its image, profile and competitiveness as set of sustainable and high-quality tourist destinations' (EP, 2015). It further asserted that standards are crucial means of increasing confidence in the sector, by improving awareness of consumers and reducing inequalities for service providers.

Following the European Commission's decision to withdraw its proposal for European Tourism Quality Principles, the EP called on the EC, Member States and other stakeholders to collaborate in defining and promoting 'a common European system for the classification of tourism infrastructure (hotels, restaurants, etc.)'. In this context, the EP highlighted the example of the Hotelstars Union initiative, which is working to bring national classification systems in the hospitality sector closer together, as an example (EP, 2015). However, there have been no new initiatives at the time of this study, although the Hotelstars Union continues to attract new members, with Liechtenstein and Slovenia joining since 2015 (see the case study in Section 5.2.1 for further information).

3.4 European Tourism Indicators System (ETIS)

One of the actions planned under the 'new political framework for tourism' set out in the 2010 Communication was the development of **a system of indicators for the sustainable management of destinations**, with the intention of using this system for a label for promoting tourist destinations (CSES, 2013). The ETIS is a management, information and monitoring tool designed by the EC in 2013 and specifically intended for the EU's tourism destinations.

The distinctive objective of the ETIS is to contribute to improving the sustainable management of destinations. It aims to help destinations and stakeholders to measure their sustainability management processes, enabling them to monitor their performance and progress over time. This voluntary scheme is meant to capture the environmental and social impacts of tourism on a destination, alongside the more commonly collected economic data. The system is flexible and allows each destination to decide which supplementary indicators to monitor taking into account the specificities of their area (e.g. maritime and beach indicators or accessibility). The scheme is seen as a way of identifying key issues for a destination to improve on, one indicator at a time and is not subject to any external auditing.

ETIS was structured into two pilot stages. The first stage, a preliminary set of indicators were tested on 104 pilot destinations. However, only 26 of them provided sufficient data. The set of the indicators was then revised and a second pilot phase started with 108 destinations. In spite of these changes, only 60 destinations actively participated in the second pilot phase. Finally, the list of indicators was changed significantly (less indicators, further complementary indicators depending on the type of destination etc.) and the indicators were refined (due to a better understanding of what is supposed to be measured). However, the measurement remains complex and the process of establishing the system is quite resource consuming. In

addition, most of the data cannot be collected through official statistics and must be measured by the destination itself. This creates different measurement methodologies. Furthermore, there is no central EU-body coordinating the system.

An online tool now allows destinations to enter their data for benchmarking. However, it remains unclear how ETIS is supposed to evolve. Currently, the issue of measuring sustainable tourism in destinations has been put on the global agenda with UNWTO developing a global framework for indicators, using the experience gained by ETIS.

3.5 Eco-Management and Audit Scheme (EMAS)

The EMAS is the EU's voluntary environmental management instrument. The EMAS Regulation[19] was introduced in July 1993 as an environmental policy tool devised by the EC as a step towards fulfilling the EU goal of sustainable development. EMAS helps organisations optimise their internal processes, achieve legal compliance, reduce environmental impacts and use resources more efficiently. All kinds of organisations, both public and private, large multi-national companies as well as small and medium sized enterprises (SMEs) with few financial resources and limited in-house environmental management expertise, can participate. Similar to ISO 14001[20], but with additional criteria, EMAS requires an ongoing system of monitoring, reporting and external auditing to achieve continual improvement in the areas monitored. Once a company is registered for EMAS, they are able to keep this certification for 3-years before needing another external verification of their plan and annual report.

3.6 The EC's consultation on the European Tourism Quality Label

In 2011, the EC published a Consultation Paper titled: 'European Tourism Quality Label', regarding the desired format and organisational running of the proposed EU tourism quality-labelling scheme. The consultation was undertaken as part of the procedure for a possible EU legislative action in tourism labelling. This is a compulsory element in the preparation of legislative proposals, even if they are non-binding. This section presents a summary of the EC's published paper '*Analysis of the Consultation on the European Tourism Quality Label*' (EC, 2011), which examined the responses from stakeholders to the consultation paper.

In the consultation paper, the European Tourism Quality Label (ETQL) was presented as an umbrella label that assesses and recognises those quality systems complying with the ETQL requirements. The Consultation Paper was composed of 19 questions, with three different operational options, and an Annex of definitions and an additional seven questions. In total, 32 tourism organisations were consulted. The three presented options were:

- Option 1 – Full European coordination
- Option 2 – European coordination with delegation to National Boards
- Option 3 – Assessment and decision at national level.

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[19] Council Regulation (EEC) No 1836/93 (the so-called EMAS Regulation) of 29 June 1993 allowing voluntary participation by companies in the industrial sector in a Community eco-management and audit scheme. This regulation was replaced in 2001 by the Regulation (EC) No 761/2001 of the European Parliament and of the Council of 19 March 2001 allowing voluntary participation by organisations in a Community eco-management and audit scheme (EMAS), which was further replaced by Regulation (EC) No 1221/2009 of the European Parliament and of the Council of 25 November 2009 on the voluntary participation by organisations in a Community eco-management and audit scheme (EMAS), repealing Regulation (EC) No 761/2001 and Commission Decisions 2001/681/EC and 2006/193/EC.

[20] The ISO 14000 group of standards focusses on environmental aspects of companies and organisations activities.

The overall preference (43%) was for a full European coordinated scheme (Option 1), with all existing labelling schemes to be eligible for inclusion. The cited advantages for this choice are simple administration and the cutting of red tape. It was also emphasised that this option would allow recognition of all types of quality systems regardless of their national administrations' willingness or capacity to participate in the initiative (see Figure 2 below). It would also facilitate consistent implementation of the European criteria and principles, allowing full comparison between the recognised systems. Further advantages of this option included:

- it could guarantee the highest likelihood to achieve strong engagement from relevant tourism bodies and businesses across the EU; and

- it would facilitate direct contact with recognised systems.

Several respondents also mentioned the need to keep the ETQL's organisation smart and simple, to avoid undue administrative or bureaucratic burden on participants. These opinions also emphasised that a light, easy structure would enable direct contact among ETQL members without extending the decision-making process. The system should focus on reducing costs and simplifying the acceptance of transnational systems. Such a system would create a common language and culture of respect among those who participate, as well as enable fluid and successful communication to and between businesses and consumers.

Figure 2: Schematic of Option 1 - the preferred ETQL structure
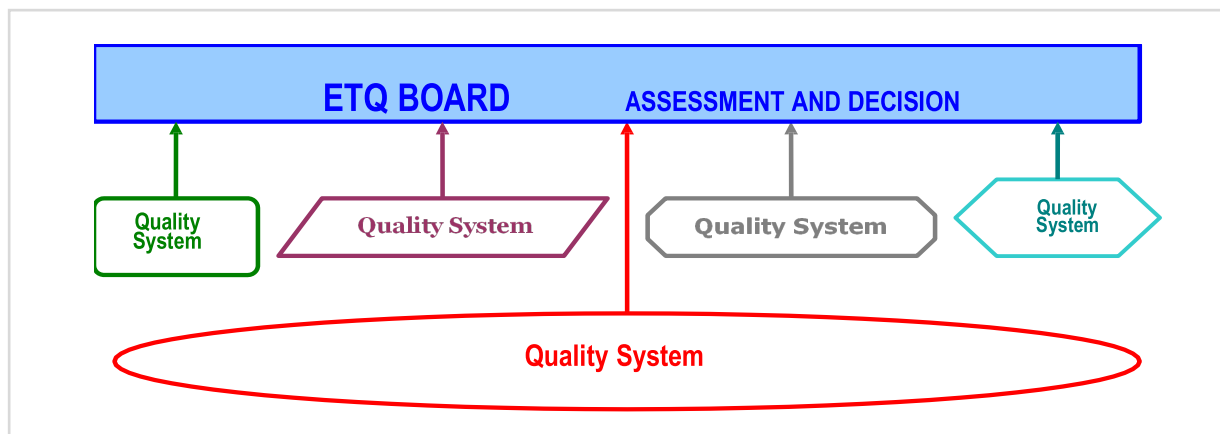
Source: EC (2011)

Of the respondents, 62% supported a pilot phase, to test the ETQL, and then for its application to be extended after the first experiences and adjustments. There were differences of opinion as to whether this should be in one sector such as accommodation, or across all sectors.

The setting up of National Boards was seen by many to be a hindrance, adding another level of decision making and perhaps abandoning a European model in favour of national preferences. Respondents emphasised that the involvement of National Boards with national interests would jeopardise the success and credibility of the ETQL and would cause complications in finding a consensus. It was also stated that it seemed appropriate not to create additional structures in a field, which is already fragmented. Among the Member States which indicated this option as the most feasible, several reasoned that they would not be able to set-up a National Board, due to the heavy administrative costs and burden it implies. It was also stressed that, with full European coordination, the system could avoid contradictory standards which otherwise may cause assessment problems. Many thought that this is the option which best serves the objectives of the ETQL.

The consultation included other questions on the management and running of the European Travel Commission (ETC). However, it suffered from a large proportion of questions unanswered (one-third), in conjunction with a large number of expressed concerns that made it difficult to present the remaining results with any certainty. A number of respondents asked for additional information and further debate, particularly on the administrative costs and burden of each operational option, which would help to understand the issues better. However, looking at the overall combination of answers, the preferred option was for *Full European Coordination* (Option 1) with all types of quality systems to be recognised.

3.7 Summary of the EC commissioned study to assess the potential impact of an umbrella European tourism label

In 2012, the EC commissioned a study to assess the potential impact of an umbrella European tourism label for quality (Renda et al., 2012). The study presented background information on the state of play for a sample of existing tourism quality labelling schemes in Member States and undertook a survey into the acceptability and possible content of an EU labelling scheme. The main aim of the study was to clarify the opportunities and challenges embedded in possible EU actions in this field and of assessing the potential benefit of an EC initiative.

3.7.1 Potential benefits for tourism businesses

Tourism quality schemes seem to have a considerable snowball effect and the higher the number of participants, the higher the cumulative impact in terms of additional recommendations to visit the country. The impact for the international market segment of customers could be even higher in terms of increased turnover. Hence, increasing international arrivals by 10% would translate into increased turnover by at least 15%, irrespective of additional value for money considerations related to being affiliates of a quality scheme.

3.7.2 Potential benefits for consumers

In the EU, there are numerous quality schemes that encompass the operations of thousands of tourism businesses across different industries, countries and regions. This diversity can be confusing, particularly for international travellers looking for a single logo that represents quality. Quality labels, if effectively managed, complement other tools (such as online reviews) in supporting consumers' decisions. Data from successful national quality schemes show that members of the scheme provide their customers with:

- an overall perception of value for money that is almost double that of the average unlabelled competitors;

- a perception of overall quality that is one third higher than that of unlabelled competitors; and

- a perception of overall friendliness and hospitability of personnel that is almost double the average among unlabelled competitors.

The potential reduction in transaction costs and the increased confidence in the prospective quality of the services suggest that a scheme provides substantial benefits to both consumers and businesses.

3.7.3 Main findings of the EC's study

Eight main findings emerged from the market analysis and stakeholders' feedback:

1. Numerous quality labels have been created in the tourism sector, both by public authorities and private organisations, for various reasons, mostly related to signalling,

reducing transaction costs, achieving coordination of participants' actions and avoiding free riding opportunities generated by the incompleteness of the information available in the market.

2. Businesses that have joined a quality label scheme reportedly experience an overall increase in their quality.

3. There is a remarkable fragmentation and inconsistency in criteria, principles and governance modes among the 30 quality schemes included in the sample.

4. Stakeholders mostly agree that the number of existing tourism labels in the EU is confusing for both businesses and consumers.

5. Stakeholders mostly agree that the proposed initiative could improve upon the status quo and positively contribute to the competitiveness of the European tourism sector. However, stakeholders have pointed out that the initiative should be bottom-up, complementary to existing schemes, voluntary, free of charge, and simple, i.e. not too burdensome for businesses, especially micro and small enterprises.

6. There is a sound economic rationale behind the proposed initiative. The existing quality evaluation schemes in tourism can economically benefit from a voluntary umbrella scheme at the EU level. In particular, an initiative is needed to address the existing fragmentation among quality evaluation schemes. Fragmentation generates confusion and can negatively affect the competitiveness of European tourism.

7. Any EU initiative should include criteria related to the functioning of the schemes, the frequency of monitoring, and the establishment of a complaint-handling mechanism.

8. The EC had put forward a concept paper detailing 16 criteria to be included in the umbrella scheme. These criteria were analysed and subject to consultation. Seven criteria elicited a wide agreement among stakeholders; another seven were seen with favour, but with some caution; the two remaining criteria were deemed to be difficult to comply with, particularly by professional associations.

3.7.4   Policy options analysed

The study assessed three policy scenarios based on their interpretation of the EC's roadmap:

Scenario 1: status quo/no policy change scenario.

Scenario 2: the soft law scenario, whereby the Commission adopts non-binding instruments addressed to Member States and industry associations to encourage the mutual adoption and the consolidation of quality schemes.

Scenario 3: a voluntary ETQL scheme, established by means of a regulation addressed to existing or future quality schemes. This scenario is specified in three possible sub-scenarios, which are presented in Table 3 below.

Table 3: Sub-scenarios for a European Tourism Quality Label (ETQL)

Sub-scenario 3.1 – Basic ETQL	
1	undergo regular quality assessments;
2	carry out consumer surveys and systematically take them into account;
3	establish a complaints handling mechanism;
4	identify a quality coordinator;

5	involve the employees in the quality process;
6	keep and follow a documented action plan according to the outcome of the quality assessments;
7	provide correct, reliable and clear information accessible to consumers about services in at least one relevant foreign language;
Sub-scenario 3.2 – Intermediate ETQL	
8	allow consumers to submit complaints via the internet, if a website is available;
9	respect and follow national/regional/local customs, heritage, traditions and identity;
10	if a website is available, apply the same rules to information provided online;
11	provide information on available local services and products;
12	provide customers-oriented services and processes including maintenance, safety and cleanliness;
13	keep and follow a preventive maintenance plan identifying the elements and equipment to be periodically maintained;
14	keep and follow a documented cleaning plan for the facilities and/or equipment;
Sub-scenario 3.3 – Advanced ETQL	
15	provide evidence of trained and experienced employees relevant to the business activities at all levels of the hierarchy;
16	keep a training plan for the personnel that should include planning for further training courses at least once a year for each job position.

Source: Renda et al. (2012)

Identifying the best possible option implies a trade-off between different criteria. More specifically, to maximise the potential impact on competitiveness and limit the marginalisation of micro-enterprises, the intermediate scenario 3.2 appears to be the preferable scenario. However, a more positive impact could be achieved by adopting the more advanced scenario 3.3, provided that mitigating measures are foreseen for micro-enterprises with regards to the increased burden of training largely seasonal and temporary staff.

3.7.5   Conclusions stemming from the EC's study

The EC's study concluded that, while there are examples of successful labelling schemes within Member States, there is no clear EU level scheme to market the whole of the EU. The creation and running of such a scheme would provide many notable hurdles, including the coordination and monitoring of the various actors (with often opposing remits). The benefits of a European Tourism Quality Label could bring added-value under certain conditions. In the opinions of the interviewees, the European benefit of the label would mainly consist of:

- increased market visibility by displaying the EU label, if a critical mass is reached; and

- the learning and sharing of best practices made possible by the establishment of a forum or platform mechanism as a side effect.

3.7.6 The EC's actions based on results of the consultations and recommendations of the EC's study

The consultations and the EC's study were specifically conducted to feed into the impact assessment required in the preparation of a proposal for EU action. As a result of the assessment of the three options described above, the EC presented the proposal for the Council Recommendation on the European Tourism Quality Principles.

Box 1: European Tourism Quality Principles

The proposal from the EC focused on the following principles**:**

1. Tourism service providers following the principles should ensure the training of all employees involved in the provision of services directly to consumers in order to ensure the satisfactory delivery of the tasks assigned to them. This recommendation also requires them to:

   - record the attended training by the employees in a training register;

   - appoint a quality coordinator in order to ensure a coherent approach towards the quality management of the services provided; and

   - involve the relevant employees in the quality process.

2. Apply a consumer satisfaction policy, including the establishment of a mechanism for the handling of consumers' complaints at the place of the delivery of the service or via the internet and ensuring that complaints are responded to without delay. Moreover, tourism providers should carry out consumer satisfaction surveys and, taking into account the results thereof, improve the quality of the service.

3. Tourism service providers should keep a documented cleaning and maintenance plan for the facilities.

4. Tourism service providers should make information available to consumers on local customs, heritage, traditions, services, products and sustainability aspects etc.

5. They should also ensure that this information is correct, reliable, clear and accessible in at least the most relevant foreign language, if appropriate to the location and business concept.

Source: EC (2014)

However, the proposal did not receive sufficient support from the Member States in the Council, and the ETQP were withdrawn in March 2015.

"*The main concerns of the Member States rejecting the proposal were the proposal's compliance with the principle of subsidiarity and the EU's competences in tourism under the Treaty* [of Lisbon]." There was also concern regarding the "*EU added-value and the effectiveness of the measures proposed.*" Particularly, "*the voluntary nature of the Recommendation proposed*,[…] *the broad scope of application and therefore of the general nature of the principles*" (EC, email correspondence, February 13, 2018).

4 STAKEHOLDER CONSULTATION

KEY FINDINGS

- There is general agreement that **labelling is important for consumer confidence and information and as an incentive to improve quality or sustainability**.

- **Most stakeholders and labelling organisations support the idea of some form of EU action.**

- **The wider stakeholder group prefer a more comprehensive action**, such as the introduction of a single umbrella label, **whilst labelling organisations have a greater preference for providing advice, assistance and networking.**

- Whilst recognising the conflict between some quality and sustainability criteria, there is **support for a combined label, suggesting that this must be the longer-term goal**.

- There is also **support for the development of a European set of standards**, best achieved by adapting existing structures, but verification and certification should be administered as locally as possible.

4.1 Introduction

Two surveys were undertaken as part of this study to gather opinions from key stakeholders across the EU. The first survey was with key stakeholders such as national tourism associations, tour operator/travel agent associations, hotel/restaurant associations, NGOs and national/regional public authorities. The second survey was with organisations issuing tourism labels for both quality and sustainability.

Both surveys addressed the key questions set out in the introduction to this study:

- What are the key benefits of labelling schemes for: a) consumers, and b) tourism businesses?

- Can these be achieved better at the European, rather than at national or regional level?

- Would a single European label raise the level of quality or sustainability of tourism in the EU and therefore enhance global competitiveness of the European tourism?

- Is there support from stakeholders, i.e. tourism businesses, associations, etc., for an EU action?

- How should a single European label be organised?

The first survey was sent to over 400 stakeholders in the tourism industry across the EU (see Annex 1), including:

- international/national tourism associations,

- tour operator/travel agent associations,

- local/regional destination tourism associations,

- hotel/restaurant associations,

- environmental and social NGOs,

- tourism consumer associations, and

- national/regional authorities.

In total, 75 responses from across the EU were received. All of the EU28 were represented except for Croatia, Luxembourg, Poland and Romania.

The second survey was sent to over 100 existing labelling organisations (see Annex 2), removing where possible overlaps with the first survey. In total, 42 useable responses were received. Whilst the EU28 coverage was less well spread as compared to the first survey, responses were received from ten global, five European and 19 national organisations.

4.2   Stakeholder survey

4.2.1   What are the key benefits of labelling schemes for: a) consumers, and b) tourism businesses?

The purpose of labelling, in helping to overcome market deficiencies in the tourism sector, particularly in signalling and coordination, has been discussed earlier (Section 2.1). However, it is also important to understand how stakeholders perceive the role of labels and how they perform this role. Figure 3 below shows the relative importance given by the participants of the survey to the different benefits of labelling. Crucially, they see *consumer confidence/information* and an *incentive to improve quality/sustainability* as key functions. This aligns closely with the objectives of EU tourism policy.

Figure 3: How important are the following benefits arising from label schemes?
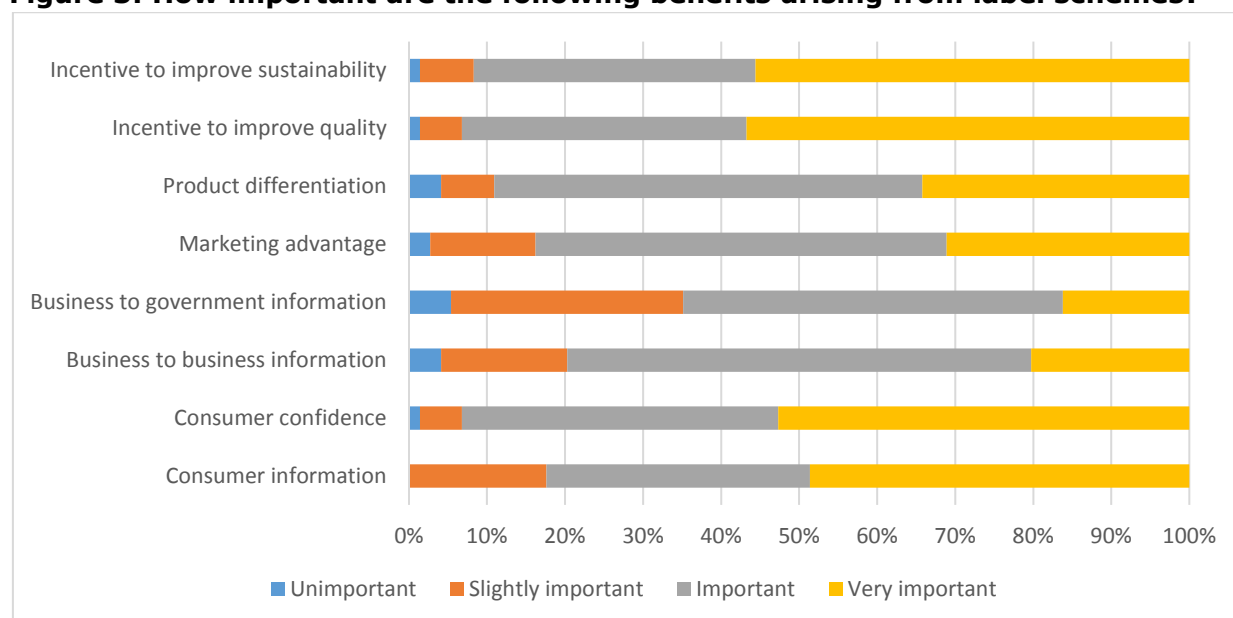
Source: Authors' own analysis of the survey's results

Several other benefits were also suggested, such as '*increasing comparability between countries and regions*', '*knowledge transfer*' through '*networking and cooperating with other certified businesses … for strategic development*', and as '*a broader business tool'*. There is a perception that, through the inclusion (or not) of some criteria, the overall performance of a business might be improved, aside from overcoming the impacts of market deficiencies in the tourism sector.

4.2.2   Can these be achieved better at the European, rather than at national or regional level?

The proliferation of labels has already been identified as confusing for businesses as well as for the consumer. In some cases, the volume of existing labels maintains the conditions

affecting negatively the tourism sector. One of the possible solutions is to establish a higher-level label that would be recognised more widely.

Figure 4 shows that a majority of the stakeholders believe that the benefits of labelling are better achieved at this higher level, however, around a third do not and another third have some reservations. Whilst most can see the benefits arising from a stronger *brand* that might be achieved through the use of higher-level labels, there is concern expressed by the participants of the survey that too narrow criteria will not reflect regional differences in heritage, culture, topography, etc., and that, although harmonisation has benefits, '*we should cherish diversity as well*'.

Figure 4: Do you believe that international/global labels achieve the above benefits better than national or sub-national ones?
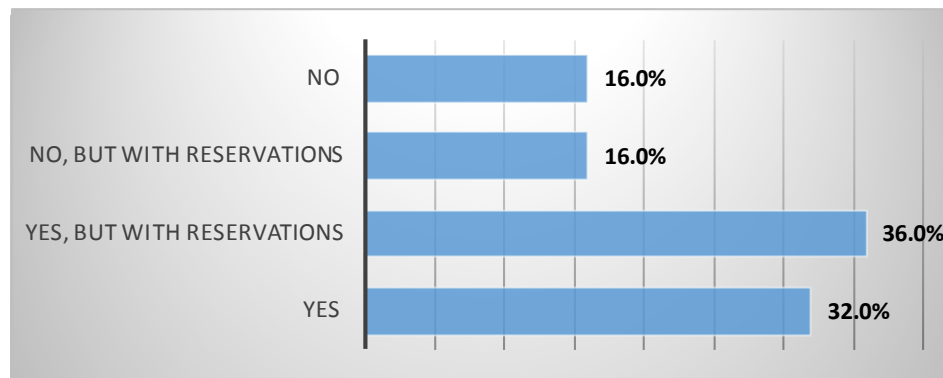
Source: Authors' own analysis of the survey's results

There is also some belief among the respondents that tourists will have, if properly regulated through verification and certification, a much higher confidence in such labels, overcoming issues like greenwashing. However, many are equally concerned about the level of administration and bureaucracy generated by higher-level labels, impacting disproportionately on the smaller businesses that are a significant proportion of the tourism sector. It is, therefore, important that the industry be closely involved with the development of schemes.

4.2.3 Would a European label raise the level of quality or sustainability in Europe?

When focussing on the EU as the level for labelling, the responses appear to be more in favour, with three-quarters believing a European label would raise the profile of the EU as a quality/sustainable destination. This may be an indication that European tourism is seen as more homogeneous than international or global tourism.

Many of the same reservations expressed above were voiced here as in the previous question and the acceptance by national tourism bodies and industry was seen as an important factor in success (see Figure 5 for details).

Figure 5: Would a European label be helpful in raising the profile of European tourism destinations for quality and/or sustainable tourism?
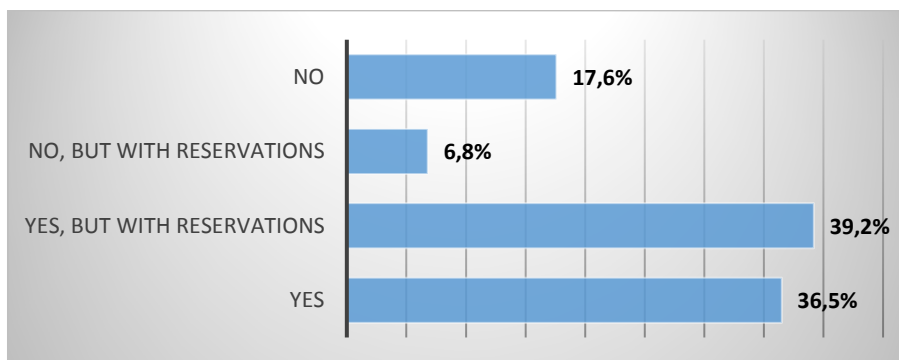
Source: Authors' own analysis of the survey's results

One of the main advantages seen in a European label was a higher level of recognition, particularly outside the EU. However, it would need to be supported by an appropriate marketing campaign to raise awareness with consumers, both within and outside the EU, as well as with tourism businesses themselves.

Figure 6: Would a European label achieve significant benefits for tourism businesses and sites?
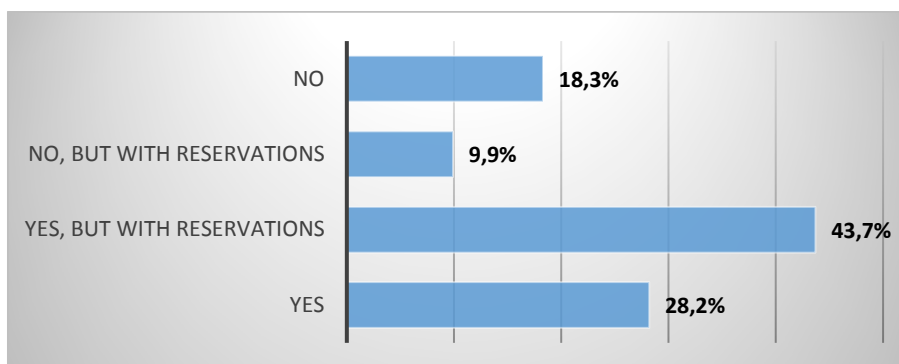
Source: Authors' own analysis of the survey's results

Respondents were also asked whether they thought a European label would improve consumer information and confidence. Two-thirds were of the opinion that a European label would improve consumer information and three-quarters thought that it would enhance consumer confidence. Equally, there was a strong belief that it would improve quality and sustainability, with around three-quarters supporting this proposition. Furthermore, as reflected in Figure 6 above, over 70% of respondents thought that a European label would bring significant benefits for tourism businesses or sites (with or without some reservations). These included improved business efficiency as well as an enhanced level of business.

4.2.4 Is there support from stakeholders, i.e. tourism businesses, associations, etc., for an EU action?

Given the majority perception that a European label would bring benefits to European tourism, for both quality and sustainability, it is not surprising that there was strong support for an EU action. As presented in Figure 7 below, there was strongest support for the option *'Provide advice, assistance, networking and promotion …'*, with over 70% of respondents *Agreeing* or *Agreeing with reservations*. Both other options also received a majority agreement, perhaps slightly surprisingly the 'less interventionist' option, *'Introduce a common European standard …'*, was slight less favoured.

The preference for a single European label appears to be based on the belief that this would *'be very easy for the consumers and would make it simple to compare.'* However, there was also concern that this would add another label and it might be better *'to look at existing European schemes such as Travelife, EMAS and EU Ecolabel instead of developing a totally new label'*.

Figure 7: There are different ways in which the European Union could support the identification of quality and sustainable tourism in Europe. Please indicate your reaction to each suggestion below.
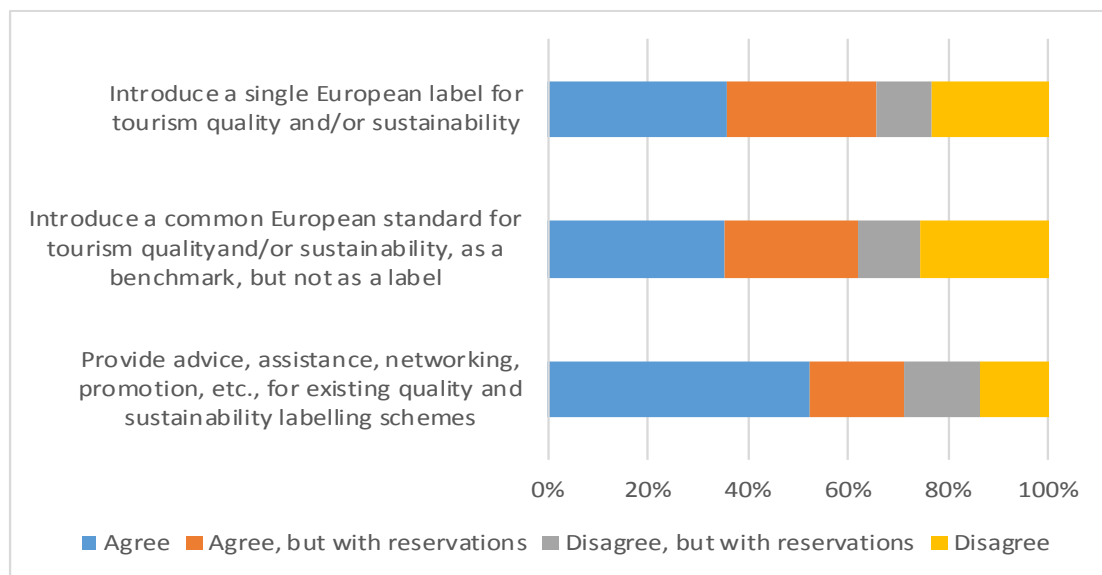
Source: Authors' own analysis of the survey's results

One of the reservations expressed regarding the introduction of a common European standard is that, while it is good for business to business or business to government communication, it is unlikely to have the same impact as a label on consumers. Again, given the number of existing schemes, it was suggested that the best option would be '*adapting existing systems*', but it should be applied as an umbrella label for existing schemes, so that it places '*no additional financial or administrative burden on businesses*'. However, for this approach to work it would have to present a clear message to consumers.

4.2.5   How should a single European label be organised?

Whilst there are still some barriers to the full integration of quality and sustainability standards, particularly in the hospitality sector, half of the respondents thought that an EU action should focus on both areas as *a combined label or standard* (see Figure 8 below for details). Although recognising that there are important differences in the way quality and sustainability are measured (quality often more subjectively), many thought that the best longer-term option was to combine the two: '*our policy is to add sustainable management and activity to the basic criteria*', '*modern consumers take environmental credentials very seriously, and consider them integral to the quality of their experience.*'

The results of the survey, as demonstrated in Figure 8 below, revealed that respondents clearly preferred some action on both quality and sustainability, with 50% opting for a combined label or a standard and a further 32% preferring separate labels or standards.

Figure 8: Should an EU label focus on:
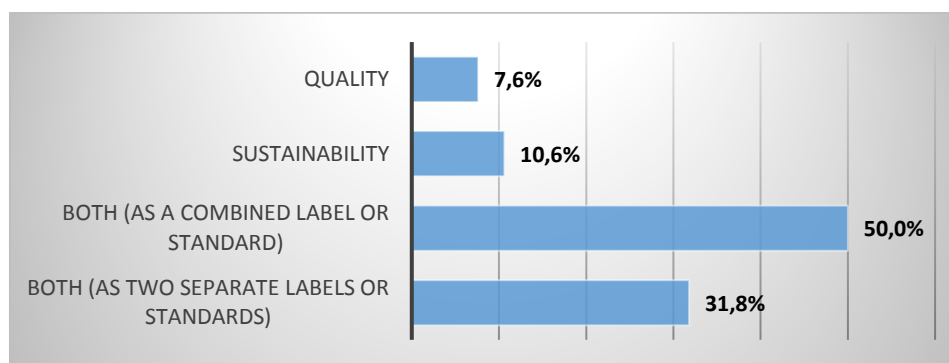
Source: Authors' own analysis of the survey's results

Figure 9 below shows that there were similar proportions of those preferring the administration of a label to be at European or at national level. In practice, the participants of the survey favoured a division of responsibilities between the two administrative levels. They specifically recommended that the criteria were set at European level, while the validation and certification was managed at national or sub-national level, depending on the organisation of tourism within a Member State (for example, in Belgium this is managed by the three regional authorities).

Figure 9: If a European label was established, should it be administered:
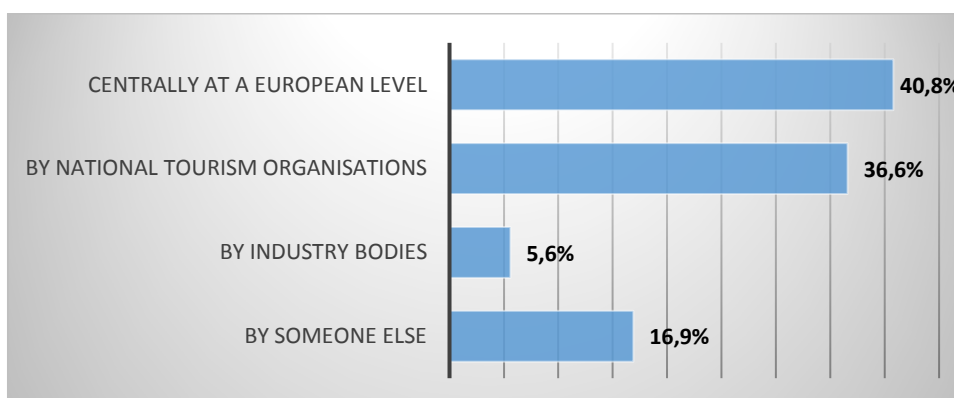
Source: Authors' own analysis of the survey's results

4.3   Survey of labelling organisations

Sustainability and/or environmental labels dominated responses to this survey. As demonstrated in Figure 10, a significant proportion of these included '*Quality management*' criteria in their label. Although, '*Quality services'* was strongly associated with '*Quality management'*, it was much less likely to be associated with the other criteria. This reflects the conflict between certain measures of quality and those for sustainability or environmental impact. Quality management more often is a measure of internal procedures.

Figure 10: Which criteria does your label include?
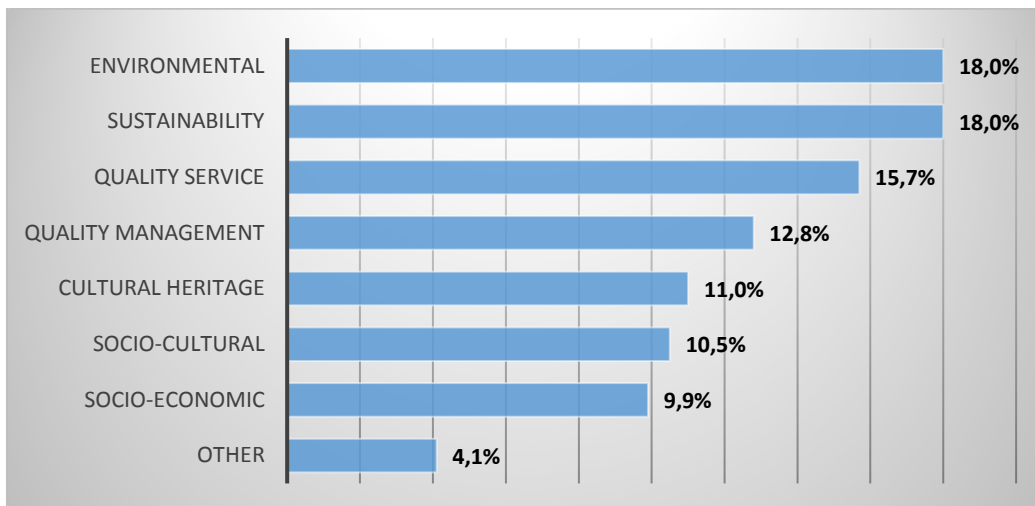
Source: Authors' own analysis of the survey's results

4.3.1 What are the key benefits of labelling schemes for: a) consumers, and b) tourism businesses?

As with stakeholders, labelling organisations saw the main benefits from labelling schemes as '*Consumer confidence/information*' and '*Incentive to improve sustainability/quality*', although they give slightly more importance to '*Product differentiation*' and '*Marketing advantage*' (see Figure 11 below).

Figure 11: How important are the following benefits arising from a label scheme?

Source: Authors' own analysis of the survey's results

4.3.2 Are these better achieved at a European, rather than national or regional level?

In the survey, around three-quarters of the labelling organisations said they aligned themselves with other national or international standards and around half of them felt this would help promote participation in the label. Two-thirds reported an increase in participation in their label over the past five years, while a quarter of labelling organisations reported it had remained static. One of the main reasons suggested for both increases and decreases in take-up was the perceptions of the businesses, either the understanding of the value of the

schemes in customer recognition, or in improving their business performance, or the lack of understanding of the value of the certification process and labelling.

Success seems to breed success: as a label increases its membership it becomes more visible to tourism businesses, attracting further members.

4.3.3 Is there support from stakeholders, i.e. tourism businesses and associations, existing labelling schemes, etc., for an EU action?

Over half of the labelling organisations that responded to the survey indicated that they would support an EU action in tourism labelling, with a further third also agreeing but with reservations (please see Figure 12 below). There was a call for a coordinated approach from the EU, in order to avoid giving support to competing schemes, which is likely to lead to more confusion in the market. There is concern that the creation of another label will also lead to further confusion, with several respondents suggesting that the best option would be to support the further development of an existing label or standard.

Figure 12: Would you support actions by the EU in order to strengthen tourism labels?

NO	10,0%
NO - WITH RESERVATIONS	
YES - WITH RESERVATIONS	35,0%
YES	55,0%
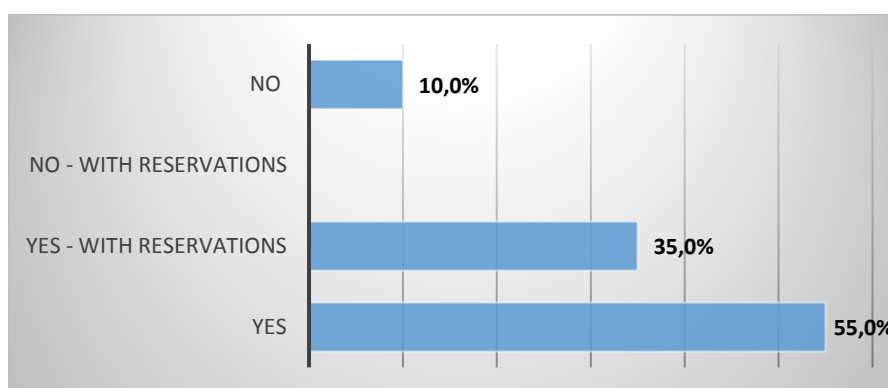
Source: Authors' own analysis of the survey's results

The above point of view is reflected in the type of preference for an EU action. Figure 13 below shows that a third of respondents chose the option '*Provide advice, assistance, networking …*' and another third preferred the option '*Introduce a common European standard …*'. There were similar numbers preferring the more extreme positions of '*No action*' and '*Introduce a single European label …*'. The first group's responses are represented by comments like '*Throwing another label into the mix won't make it easier for the guest to make a decision*' or '*There are already lots of labels*' and it is '*Better* [to] *support known local labels*', contrasted with more pro-European label responses '*one label would help to improve the overall quality of European tourism*', whilst acknowledging that the differences in businesses and destinations '*would make launching* [a] *single label really challenging*'. One interviewee went as far as to suggest a timetable of actions:

'*I recommend three steps:*

- *Firstly, provide advice, assistance, networking for existing labelling schemes in 2018-2019;*

- *And after, introduce a common European standard … for tourism, as a benchmark, but not as a label in 2020-2021;*

- *Finally, introduce a single European label for tourism … in 2023*'.

Other respondents focussed on other issues such as the incorporation of SDGs into standards.

Figure 13: Which action would you recommend?
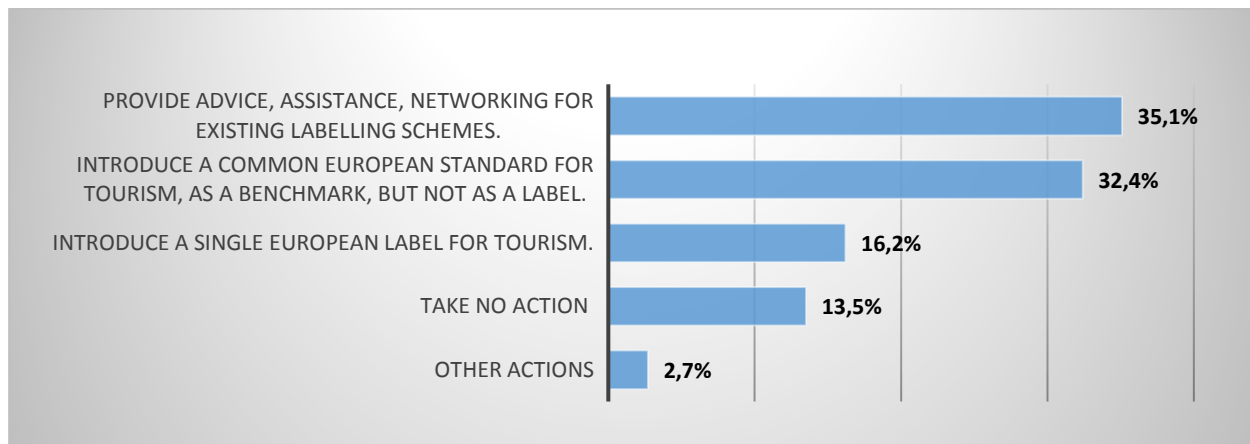
Source: Authors' own analysis of the survey's results

The labelling organisations were offered two additional responses to the question '*Which action would you recommend?*', '*Take no action*' and '*Other actions*'. There is a clear difference between the responses to the two surveys, with a less interventionist, average, response from the labelling organisations. With 13.5% selecting the '*No action*' option and 35.1% selecting the '*Provide advice, assistance, networking …*' option, a little over half are against the introduction of a new standard or label.

4.3.4 How should a single European label be organised?

There was also a greater diversity of responses regarding the focus of the EU label, with most respondents supporting labels covering the different aspects of tourism separately. As can be seen in Figure 14 below, only a sixth of the labelling organisations favoured a single combined label, compared to half of the stakeholders from the first survey, preferring this option. Although most of the comments from the labelling organisations appear to support a combined label, suggesting that this would reduce '*the need for multiple audits*' and '*it would be easier for consumers to recognise one label*'. There was also recognition that currently many quality and sustainability criteria are incompatible, suggesting that '*Existing star systems for the hotel sector are fine*' but '*quality system*[s] *should green themselves*'.

Figure 14: Should an EU label focus on:
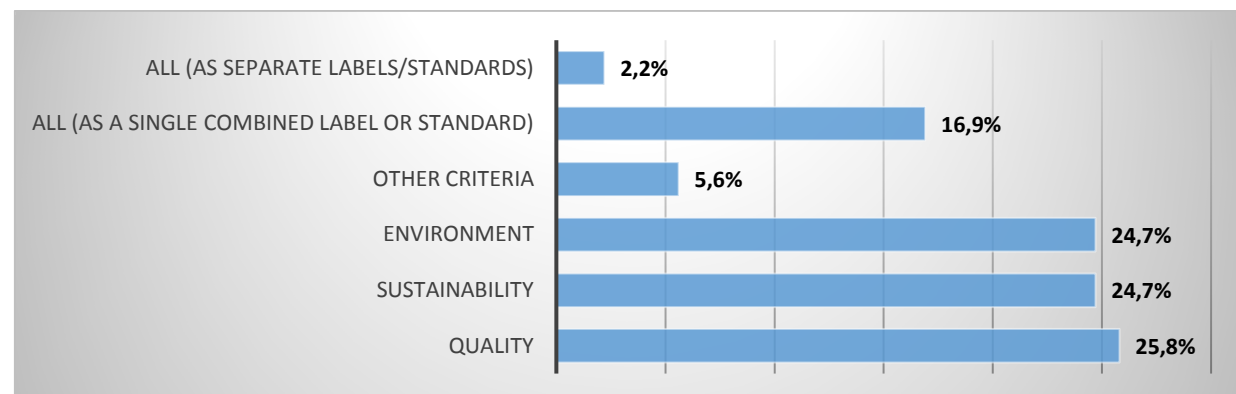
Source: Authors' own analysis of the survey's results

As with the level of intervention and the focus of the label, there is a difference of opinion on the level at which it should be administered. Almost half of the labelling organisations thought that this should be done at national level and a quarter at European level, compared to an even split of around 40% for each option in the stakeholders' survey.

Most of the suggestions advocating the '*By someone else*' option felt that it would be better to keep the existing labels or standards, with some again arguing that the criteria could be set at European level, whilst the audits should be managed at national level (see Figure 15 below).

Figure 15: If a European label was established, should it be administered:

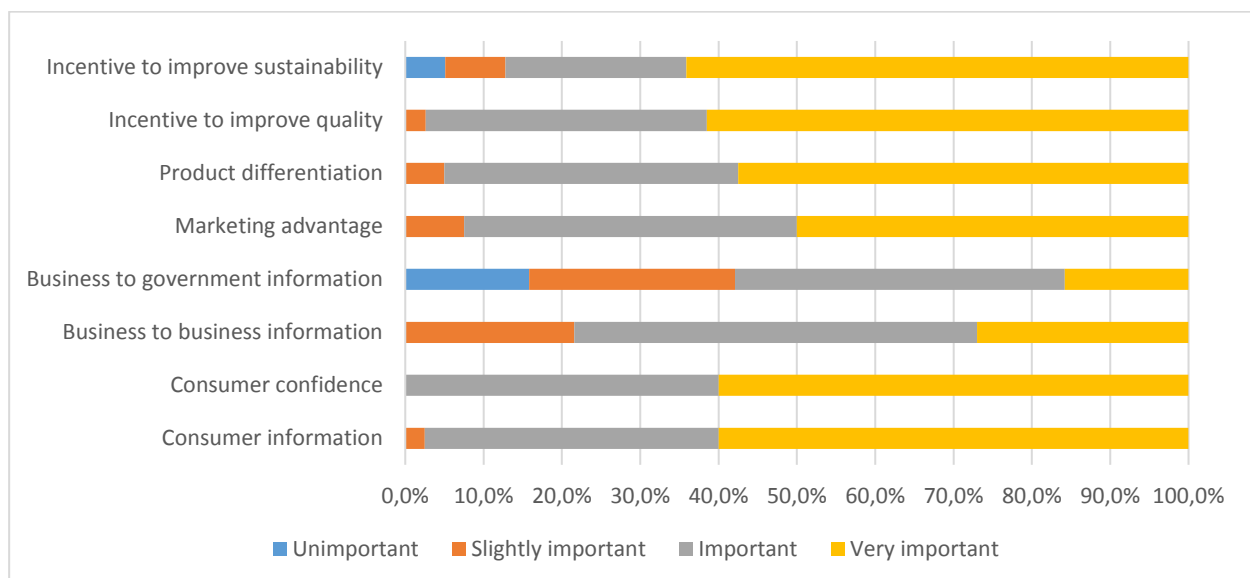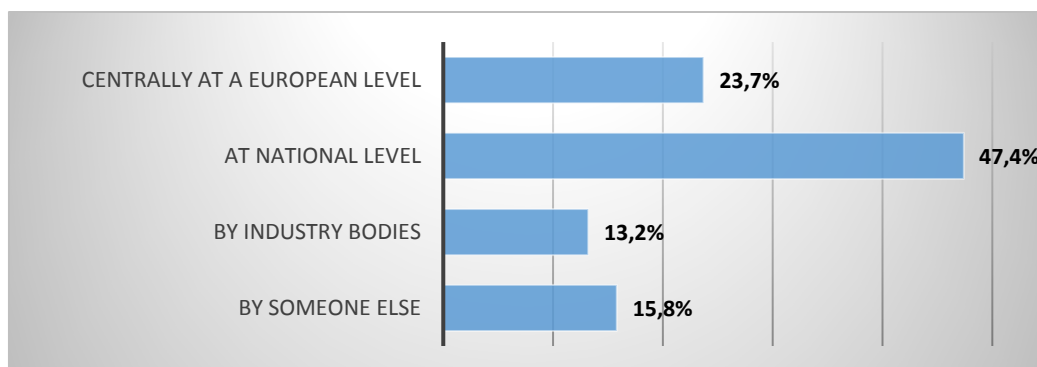**Source:** Authors' own analysis of the survey's results

4.4   Summary

There is broad agreement from both groups of respondents that labelling has two central benefits: firstly, it is important for '*consumer confidence/information*' and secondly, it is an '*incentive to improve quality/sustainability*'. The majority in both groups are also receptive to some form of EU action to support tourism labelling. However, the degree to which they would like to see intervention in the market is less consistent, with the wider stakeholder group preferring a more comprehensive action, such as introduction of an umbrella label, whilst the labelling organisations have a greater preference for the '*providing, advise, assistance, networking, etc*.' option. This is unsurprising as the market is already crowded and competition from another, well-funded label may threaten the existence of present labelling schemes.

Although many respondents recognise the conflict between some quality and sustainability criteria, they express support for a combined label, suggesting that this must be the longer-term goal if European tourism is to prosper. Whilst there is also support for the development of a European set of standards, many respondents think that this would be best achieved by adapting existing structures, such as the EU Ecolabel. However, many also think that the verification and certification should be administered as locally as possible, i.e. nationally or regionally.

5   BEST PRACTICES IN TOURISM LABELLING

KEY FINDINGS

- There are complexities and sensitivities associated with the concept and with the positioning of a higher-level label within existing networks of labels.

- The GST-Criteria already provide a global benchmark. **The creation of a separate standard or a European umbrella label for EU tourism sustainability could be seen as duplicative and clear European added-value will need to be identified**.

- Drawing from the success of the online platforms ratings it is clear that **an EU-coordinated tourism labelling scheme should have a system to acknowledge, manage and value consumer feedback.**

- **Even with the support of industry and national associations, market penetration of the higher-level labels does not appear to be significantly different from the penetration of lower-level labels**. Whether this reflects a limited appetite for quality labels in general or an increasing acceptance of online reviews, it is too early to predict. However, any EU labelling proposals will need to address this issue if it is to be successful.

- The participation of businesses in the development and management of label schemes is important for their success. **Any EU level initiative should not deflect from local support process.**

- The interpretation of quality needs to reflect the type of experience visitors are expecting.

- **An effective European label or standard would need a certain flexibility for regional differences and/or for special business segments.** Flexible criteria also allow a wide range of business types and levels to be certified under one label.

The case studies analysed in this study have been chosen to reflect insights and best practices in relation to the introduction of an EU-harmonised certification system for tourism services and to the possible development of a European label for tourism quality and sustainability. They are divided into three groups (global, European and national) to highlight the successes and issues raised at the different levels of geographical coverage, as well as to demonstrate the different models of governance. The list of case studies selected for this research paper is presented in Table 4 below.

Table 4: List of case studies analysed in this research paper

Case	Quality or Sustainability
Global	
TripAdvisor / Booking.com	Quality
Global Sustainable Tourism Council (GSTC)	Sustainability
European	
Hotelstars Union (HSU)	Quality
EU Ecolabel	Sustainability

National	
VisitScotland and Green Tourism	Quality and sustainability
Effectiveness of sustainable tourism labels in Germany	Sustainability
Q Calidad Touristica in Spain	Quality
Green Slovenia	Sustainability
Partner-Initiatives for National Landscape in Germany and ServiceQuality Germany	Sustainability and quality
Nature's Best Sweden	Quality

5.1 Global

5.1.1 TripAdvisor / Booking.com – labels based on user-generated quality assessment

Introduction

The growth of e-commerce has empowered consumers by giving them the opportunity to assess and rate a product or service experience. This is very pertinent in the travel and tourism industry. According to Juman, Merten and Eisebeis (2016), online channels accounted for 49% of European travel bookings in 2016 (it is estimated that by 2020 this will have grown to 58%). Online reviews influence the market in two ways. Firstly, they are used by platforms, such as TripAdvisor and Online Travel Agencies (OTAs), such as Booking.com, in algorithms to define the rank of the product or service listing. This has an extremely significant impact on businesses, as the establishments listed first have an increased chance of being chosen. Secondly, reviews are displayed and synthesised as a score in the customers' search results, becoming a key factor in the hotel selection process[21]. However, travellers do not just look at the total score (i.e. a hotel's overall reputation), they also examine guest ratings and comments on the different aspects of a property, such as cleanliness, services and comfort. Reviews are thought of as a trustworthy source of information that allow travellers to form a better opinion of the property or service independent from official marketing and communication channels. In addition, every year OTAs and TripAdvisor award the best performing businesses with a label that can be displayed in all digital and traditional marketing activities.

The Booking.com and TripAdvisor cases have been chosen for two reasons. Firstly, they are two of the most popular websites reporting user-generated hotel reviews (measured by unique monthly visits). Secondly, because they offer two different approaches in managing the user-generated content. Reviews on Booking.com can only be written by visitors who have stayed in a property. Booking.com sends an email to its clients after they have checked-out, this email contains a link to a questionnaire that generates the review. TripAdvisor allows anyone with an account to post a review on hotels, regardless of whether or not they have stayed at the hotel they are reviewing. To counter this weakness, TripAdvisor has

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[21] 90% of those polled in an IPSOS MORI survey in 2015 on behalf of TripAdvisor indicated that ratings on a review site played an essential role in their booking decision.

implemented several safeguards. The most important of these is based on their proprietary algorithm called *The popularity index*. The algorithm determines rankings based on the quantity, quality and age of reviews for any given property. Details concerning functioning of the two online platforms are presented in Table 5 below.

Table 5: TripAdvisor / Booking.com overview

	TripAdvisor	Booking.com
Relevance	TripAdvisor claims to have more than 535 million reviews and opinions covering a selection of over 7 million accommodation providers, airlines, attractions, and restaurants. It has an average of 415 million unique monthly visits worldwide.	Booking.com has been estimated to account for 50% of all online transactions in Europe. It has a monthly average of 537 million unique visits worldwide.
Industries covered	Hotels, destinations, beaches, landmarks, attractions, airlines, holiday rentals, restaurants.	Hotels, destinations, beaches, holiday rentals, restaurants.
Rating system	Quality is assessed by people registered on the portal as part of their reviews using a *5-bubble* rating system. Properties with more 4 and 5-bubble ratings rank higher than a business with lower bubble ratings.	Guests, soon after their stay and within a deadline, fill out a score for each of the following categories: staff, service and facilities, cleanliness of the room, comfort, value for money and location. The score displayed (from 2.5 to 10, 10 being the highest) is an average of all the reviews shown at the time.
Awards	*Certificate of Excellence* is given to establishments that have consistently achieved higher traveller reviews on TripAdvisor over the past year. To qualify for a *Certificate of Excellence*, a hospitality business must: - maintain an overall TripAdvisor rating of at least four out of five, - have a minimum number of reviews (the exact quantity is part of the secret algorithm), and - have been listed on TripAdvisor for at least twelve months. *Travellers' Choice* are the highest honour of TripAdvisor. The award is based on millions of reviews and opinions from travellers around the world.	*Guest Review Award* is given to properties with an average review score of 8.0 or above and with 10 or more reviews online.

Source: Author's own analysis of information presented on organisations' websites

There is also robust evidence of the marketing effectiveness of online platforms. A study in 2012 (Anderson, 2012) found that if the review scores go up one point on a five-point scale,

businesses could raise room prices by just over 11% and still maintain the same occupancy rate or market share.

Another study (TrustYou, 2015) measured how TripAdvisor rankings affect bookings for AccorHotels' European and Asian-Pacific properties. It found that a larger number of 5-bubble reviews, a higher average review score, and a higher ranking on TripAdvisor resulted in more bookings. The study also examined how the different ranking and rating systems affected bookings. A higher percentage of 5-bubble reviews translates to a better ranking on TripAdvisor. A better ranking increases the hotel's visibility and leads to more bookings. The study of AccorHotels' properties found that a 10% increase in ranking on TripAdvisor equals a 4.6% increase in bookings in Europe and 5.7% in Asia-Pacific.

Trivago's[22] proprietary data show that the higher a hotel's online rating, the higher its Click-Through Rate (CTR) that is the ratio of users who click on a specific link to the number of total users who view a page. For example, when a hotel improves its online Trivago rating from *mediocre* to *okay*, it can see an up to 4% increase in its CTR. Trivago data shows that increasing the number of guest reviews from 20 to 100 can raise a hotel's CTR by up to 3%. The more reviews there are and the more popular a hotel appears to be, the more trusted is its rating.

Implications
According to definitions used in this study, a rating system based on online reviews does not qualify as a *Quality Label* for two main reasons:

1. There is no standard with a set of defined requirements approved by an independent body; and

2. There is no certification process recognised by an independent body.

However, rating systems based on online reviews have proven to be effective tools to meet the same three objectives that quality labels aim to achieve:

1. Helping consumers to evaluate and to make better choices;

2. Supporting businesses in their marketing; and

3. Supporting businesses in improving services.

In the past five years a number of new businesses have started to provide the hospitality industry with analysis of guest reviews, enabling hotel managers to obtain a deeper understanding of reputation performance, as well as operational/service strengths and weaknesses. Companies such as *ReviewPro* provide actionable insight to increase guest satisfaction and rankings on review sites/OTAs. Other companies such as *Travel Appeal* (www.travelappeal.com) have extended these solutions to restaurants, museums and destinations.

This case study demonstrates the impact online platforms are having on consumer decision making and the implications for businesses. The key success factors of such platforms are congestion, platform differentiation, trust, network effects and economies of scale (Demary and Engels, 2016). Although these success factors cannot be easily replicated in a quality label scheme, there are two main lessons to learn. First, user-generated content builds on the sense of community of travellers (they want to be helpful to each other). Second, reviews

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[22] Trivago is a multinational technology company specialising in internet-related services and products in the hotel, lodging and metasearch fields.

are easy to understand for both establishment managers and customers. The main implication for the management of an EU-coordinated tourism labelling scheme is that this should have a system to acknowledge, manage and value consumer feedback.

However, as this is still a relatively new area, caution must be exercised when drawing any longer-term conclusions.

5.1.2   Global Sustainable Tourism Council

Introduction
This case study provides information on the global coordinating body for sustainable tourism certification. It is highly relevant for this study as the EU is encouraged to make full use of the opportunities presented by the Global Sustainable Tourism Council (GSTC) in strengthening sustainable tourism certification in Europe.

The GSTC is an international non-profit organisation with members that include UN agencies, NGOs, leading travel companies, hotels, national tourism organisations, tour operators, individuals and communities. It is a virtual organisation without a main office and has staff and volunteers working in all continents. A Board of Directors elected by the members provides governance of the organisation.

The mission of the GSTC is: '*To improve tourism's potential to be a driver of positive conservation and economic development for communities and businesses around the world and a tool for poverty alleviation*'. The GSTC fulfils its mission by fostering increased knowledge and understanding of sustainable tourism practices and the adoption of universal sustainable tourism principles.

A primary activity of GSTC is to undertake accreditation of certification and labelling schemes, to ensure that their standards comply with recognised Global Sustainable Tourism Criteria (GST-Criteria) and that they follow good practice in their certification procedures. Therefore, the GSTC is highly relevant to any initiative that seeks to strengthen the performance of sustainability labels for tourism.

Background and development
The process behind the creation of the GSTC was initiated in 2007 through an international alliance of certification bodies and NGOs in the Sustainable Tourism Stewardship Council (STSC) and the United Nations Environment Programme's (UNEP) initiative to develop the GST-Criteria. Supported by the United Nations World Tourism Organisation (UNWTO), a UN Type II multi-stakeholder partnership[23] was established to prepare, the GST-Criteria over a 10-year timeframe. The aim was to support the development of certified sustainable tourism products and services at a global level. Meanwhile, the EU was the main location of over 50% of existing certified businesses and most of the active certification bodies, and had run its own tourism standards synchronisation process in the VISIT programme, contributing substantially to the development of the global discussion.

The process of establishing the GST-Criteria involved reviewing over 60 existing certification schemes and voluntary sets of criteria and receiving comments from over 2,000 stakeholders to arrive at a globally agreed set of sustainable tourism criteria. In 2010, the GSTC was formed from the earlier partnership, with assistance from the UN Foundation and funding

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[23]   Type II partnerships evolved in response to uncoordinated state-led initiatives in sustainable development. They involve actors from other sectors, including the private and third sectors, and work alongside the traditional government mechanisms to support UN sustainable development policies.

from UNEP. It has been self-funded since 2012. In 2014, it took over the Tour Operators Initiative, a sustainability programme supported by a number of leading travel companies and UN bodies (UNEP and UNWTO).

The Global Sustainable Tourism Criteria

The initial set of criteria was for hotels and tour operators. These have been reformatted as industry-wide criteria but with different indicators relating to them depending on the type of business to which they apply. There are 37 criteria in total, divided into four groups, the first of which covers the presence and functioning of a sustainability management system with the other three covering socio-economic, cultural and environmental impacts. The criteria cover a wide spectrum of topics, including issues such as employment conditions, human rights and relationship with the local community. Quality is included in a very broad way, with one of the management criteria covering the customer experience, but simply requiring that this is monitored and that corrective action is taken.

In 2016, the criteria were comprehensively reviewed through a multi-stage consultation process. This led to a number of amendments, including the addition of new issues that are increasingly recognised in the industry, such as food waste and animal welfare.

The GSTC also has a separate set of criteria for tourism destinations, with related indicators. These cover largely the same topics as the industry criteria. They may be subject to review in 2018/19.

Accreditation of sustainability certification schemes

The GST-Criteria are used in a variety of ways, including simply to provide guidance on sustainability for all tourism stakeholders. However, one of their specific purposes is to serve as a global standard against which individual sustainability certification schemes in the tourism sector can be benchmarked. This is undertaken at two levels. Firstly, a certification scheme can apply to have its own standard recognised by GSTC. This involves mapping the components of the standard against the GST-Criteria to check for equivalency, with a final judgement being made by an independently appointed Accreditation Panel. Only after this initial stage is completed, an interested certification scheme, whose standard has been GSTC-Recognised, can apply for a full accreditation by GSTC. This requires a detailed audit and assessment of its management and certification procedures.

In total, there are 28 certification schemes around the world that have achieved a GSTC-Recognised status in 2017. Of these, 12 operate in the EU and they include both multi-national and global schemes, as well as those operating in one country only. The number of global schemes that have also gone on to be accredited or approved (a similar process to accreditation) by GSTC is currently no more than five but with additional schemes at various stages in the process. Schemes that are GSTC-Recognised can refer to this fact in their communications but the GSTC label cannot be applied to the businesses they certify. Schemes that are GSTC-Accredited can license businesses they certify to use the GSTC label, on its own or alongside that of the individual certification scheme.

Successes, challenges and issues

While the speed of development and the level of outreach of the GSTC may not yet have matched early hopes and expectations, it is well established as a credible global promoter of sustainable tourism. The process of formally recognising certification standards has led to many of them making necessary improvements in their coverage of sustainability issues, especially in socio-economic matters. The number of schemes applying for GSTC-Recognised and GSTC-Accredited status is slowly growing. The GSTC itself has not achieved significant

consumer recognition, which remains a considerable challenge, but hitherto the focus of its activity has been on the supply side rather than in the market place. Importantly, it has not been able to fulfil its original 10-year business plan targets of having 25,000 new businesses certified by GSTC Accredited certification bodies by 2017, or full financial sustainability through provision of education and training services and accreditation outsourcing (although valuable income has been obtained from these activities).

Recently, GSTC has taken a new line in the development and promotion of the GSTC-Accredited status, working with some of the larger certification bodies that operate across all economic sectors and who will offer tourism certification, for the first time[24]. This may result in a higher percentage of tourism businesses being certified for sustainability and a higher visibility of the GSTC label as a global sustainability label displayed by individual businesses. However, it is a subject of concern amongst some specialist tourism certification bodies who believe that GSTC should give priority to supporting their existing labels. Furthermore, the cost of certification within this voluntary framework is often seen as prohibitive to most SMEs.

Implications

The presence of the GSTC, with its global criteria for sustainable tourism and its process of engagement with sustainability certification and labels, has significant implications for any future development of a European label for tourism sustainability, notably:

- The GST-Criteria already provide a global benchmark. The creation of a separate standard or a European umbrella label for EU tourism sustainability could be seen as duplicative and clear European added-value will need to be identified.

- The relationship between the GSTC and existing certification schemes and labels illustrates the complexities and sensitivities associated with the concept and with the positioning of a higher-level label within the existing network of labels. The EU should learn from this, with careful consideration of whether to follow a similar path rather than seeking to benefit from the steps already taken by GSTC.

- There may be potential to work with GSTC to strengthen its activities in the EU and give them a European dimension.

5.2 European

5.2.1 Hotelstars Union

Background and development

In 2009, seven HOTREC[25] members committed to applying almost identical criteria for their hotel classification and created the Hotelstars Union (HSU) under the patronage of HOTREC. The HSU is now the official hotel classification system in 17 countries in the European continent. This case study provides an interesting as European-wide, industry led, quality labelling initiative.

The HSU is a system of classifying hotels based on their quality and was developed in an effort to harmonise existing alternative EU schemes with common criteria across Europe. Participation in the system offers increased transparency and security to guests, enhancing the reputation and quality of hotels in its member countries.

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[24] Control Union BV, became the first Conformity Assessment Body to be accredited under this scheme. Please see http://www.accreditation-services.com/archives/control-union-bv-becomes-first-cab-to-earn-gstc-accreditation

[25] HOTREC is the umbrella association of Hotels, Restaurants and Cafés in the European continent. The initial members that created the HSU included associations from Austria, the Czech Republic, Germany, Hungary, the Netherlands, Sweden and Switzerland.

The national members of the HSU consist of a mixture of industry bodies and national ministries. Although HOTREC itself is an umbrella association for hotels, restaurants, pubs, cafés, etc., at present, the certification is only open to the accommodation sector and is dominated by mid-range establishments.

Currently, it is not clear whether it is attracting significant numbers of smaller accommodation providers. Only the seven original members and Denmark have hotels listed on the https://www.hotelstars.eu/ website, the other nine appear to have no current listings. The list of national members to HSU is provided in Table 6 below.

Table 6: National membership of the Hotelstars Union

Country	Year joined
Austria	2009
Czech Republic	2009
Germany	2009
Hungary	2009
The Netherlands	2009
Sweden	2009
Switzerland	2009
Estonia	2011
Latvia	2011
Lithuania	2011
Luxembourg	2011
Malta	2012
Belgium	2013
Denmark	2013
Greece	2013
Liechtenstein	2015
Slovenia	2017

Source: Hotelstars Union official web page (2017)

The HSU Criteria

The system, which is based on 270 common criteria, provides consumers with a comparable offer in terms of hotel facilities and services along the different star categories. The stars, rate from a basic 1 star to 5 stars for luxury accommodation with all levels having both a required standard and a minimum point standard above these requirements set for each star level. Additional criteria can allow a provider to be ranked 'superior' in their star category. The points are allocated to the following categories with a subset of options:

1. General Hotel Information

2. Reception and Services

3. Rooms

4. Gastronomy

5. Event Facilities (MICE: Meetings, Incentives, Conferences and Exhibitions)

6. Leisure

7. Quality and Online Activities

The joint hotel classification is a dynamic system. Its criteria and procedures are checked regularly and developed further according to the expectations of the guests. As a result, in 2015, the following criteria were developed and weighted in response:

- Better sleeping comfort;

- Better online visibility provided by hotels websites;

- Better telecommunication opportunities also in lower category hotels; and

- Better food and beverages availability in all types of hotels.

In terms of auditing for membership, it is not clear what auditing is done on properties to join a scheme and maintain their star rating outside of 4 and 5-star accommodations who have 'mystery shoppers' as part of their minimum ratings requirements.

Figure 16: The HSU scoring for each star level
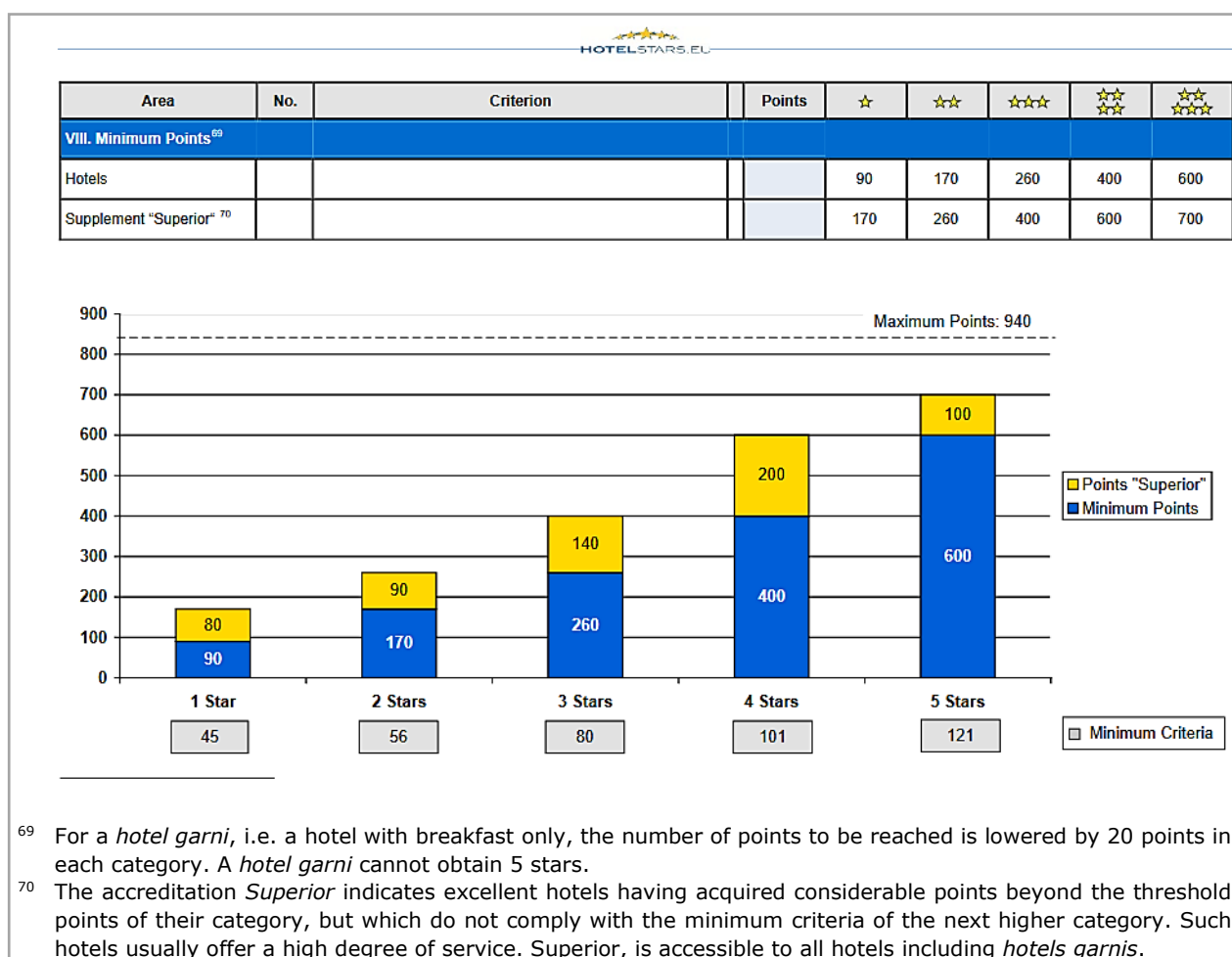
[69] For a *hotel garni*, i.e. a hotel with breakfast only, the number of points to be reached is lowered by 20 points in each category. A *hotel garni* cannot obtain 5 stars.

[70] The accreditation *Superior* indicates excellent hotels having acquired considerable points beyond the threshold points of their category, but which do not comply with the minimum criteria of the next higher category. Such hotels usually offer a high degree of service. Superior, is accessible to all hotels including *hotels garnis*.

Source: Hotelstars Union – Criteria 2015-2020 (2015, p. 22)

Accreditation of sustainability certification schemes

The majority of the scheme's criteria relate to physical offerings and amenities available at the accommodation, such as adequate room size, or breakfast options, i.e. quality criteria. For sustainability, there is a limited inclusion of deeper quality management measures under the final criteria category 'Quality and Online activities'. However, this option only allows for an additional ten points for maintaining a quality management system, e.g. the European Hospitality Quality scheme (EHQ) or eco labelling scheme (such as EMAS or ISO 14001).

Hotel owners can take a test classification online at:
https://www.hotelstars.eu/system/testclassification.

Implications

The system was designed to be applicable in all EU Member States, EEA, and EU Accession countries, incorporating cultural, geographical differences of the market and it provides an example of bottom-up initiatives coming from the hospitality industry. The objective evaluation of the HSU system, which is conducted by professionals, is seen as a contrast by the organisation to the increasing prominence of online reviews, which rely on the subjective opinions of the reviewers.

As described earlier in this section, with an initial start of seven participating countries in 2009, membership has slowly grown to include 17 European countries. However, there appears to be a limited take-up within most of these new members. Harmonisation of this scheme with existing 'stars' accommodation ratings in these new countries remains an issue, but with wider application across the European continent, the scheme can provide consumers with a clear comparison of the accommodation offer.

Although this is an industry scheme, supported by national associations, the penetration does not appear to be significantly different from other quality labels. Whether this reflects a limited appetite for quality labels in general or an increasing acceptance of online reviews, it is too early to predict. However, any EU labelling proposals will need to address this issue if it is to be successful.

5.2.2   The EU Ecolabel

Introduction

The EU Ecolabel is the voluntary environmental scheme of the European Union, which was established in 1992. This label of environmental excellence is awarded to products and services meeting high environmental standards throughout their life-cycle: from raw material extraction to production, distribution and disposal. The overall goal of the scheme is to create a more resource efficient EU economy through the transformation of production patterns as well as by providing consumers with the information to make informed choices about the impacts of their purchases. The label is a voluntary policy instrument stemming from the European Commission's Sustainable Consumption and Production and Sustainable Industrial Policy Action Plan and the Roadmap for a Resource-Efficient Europe (Vidal-Abarca et al., 2014).

Currently, it only covers the accommodation sector, this case provides a useful example of an EU umbrella certification scheme, demonstrating a potential structure through which the EC, Member States and the tourism industry might specify and administer a tourism labelling scheme.

Table 7: Breakdown of the EU Ecolabel specification

	EU Ecolabel specification
What entities can be certified?	Accommodation facilities (incl. campsites)
Subject of certification	Energy Water and waste Renewable resources Hazardous substances Environmental education and communication
Sustainability Area	Environment and some social issues
Licence Period	3-5 years
Assessment Process	On-site Third-Party Assessment
Transparency	All standards and processes are publicly available on the EC's website for the Directorate General for Environment (DG ENVI)[26]
What is included in the certificate?	• Consultancy by experts • Support software • National and international marketing • Marketing support for businesses • Networking and environmental training opportunities
Who is involved?	European Commission, competent bodies of the Member States, tourism industry and consultants
Partner organisation(s):	Environmental ministries of the EU Member States

Source: EC (2017)

EU Ecolabel for tourist accommodation services

In 2017, the EC re-specified the label, combining the two former groups of *Tourist Accommodation Services* and *Campsite Services* under a new service group *Tourist Accommodation*. Businesses now applying for the EU Ecolabel will be required to meet a simplified set of criteria that address key issues for accommodation providers. These include:

- Energy consumption

- Water consumption

- Waste reduction (including food)

- Reduction of CO_2 emissions

- Limiting emissions of hazardous substances

- Improving labour conditions (minimum wage, working hours, etc.).

In comparison to most of the national environmental and sustainability labels for tourist accommodation in Europe, the market penetration of the EU Ecolabel is very low. This is due

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[26] European Commission - Directorate General for Environment (DG ENVI) - Ecolabels - http://ec.europa.eu/environment/ecolabel/products-groups-and-criteria.html.

to the competition from a large number of other environmental certificates, including those set up by industry bodies (CABI, 2017). As Table 8 below shows, most licences are awarded in France, Italy, Switzerland, Spain, and Austria, which largely reflects the engagement of the national competent bodies in those countries.

Table 8: National membership of the EU Ecolabel

COUNTRY	HOTELS	CAMPSITES	TOTAL
France	282	73	**355**
Italy	184	25	**211**
Switzerland	49	-	**49**
Spain	42	4	**46**
Austria	37	12	**49**
Germany	3	9	**12**
Greece	9	-	**9**
Slovenia	7	-	**7**
Portugal	5	-	**5**
The Netherlands	5	-	**5**
The Czech Republic	5	-	**5**
Denmark	4	1	**5**
Malta	4	-	**4**
Montenegro	3	-	**3**
Romania	3	-	**3**
Poland	2	-	**2**
Slovakia	2	-	**2**
Finland	2	-	**2**
Belgium	1	-	**1**
Cyprus	1	-	**1**
Hungary	1	-	**1**
Ireland	1	-	**1**
Sweden	1	-	**1**
Total	**653**	**124**	**777**[27]

Source: DestiNet.eu (2017)

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[27] The figures from the EU Ecolabel site are not complete and differ from other sources. Therefore for this study, data published on DestiNet.eu (https://destinet.eu/who-who/market-place/certifiers-section/europe-certified-eu-ecolabel) were used, which lists all 777 accommodation providers.

Implications

The approach and experiences of the EU Ecolabel in tourism show how environmental criteria can be supplemented by other sustainability criteria, with the revised EU Ecolabel including wider sustainability aspects on social and other non-environmental criteria. A European certificate for sustainable tourism could include these new EU Ecolabel criteria and be completed with further social, regional economic and cultural criteria.

The minimal or complete lack of take-up of the EU Ecolabel in some countries, with many hotels preferring the national system and label, illustrates the need to have national partners who are fully engaged if an EU labelling scheme is to be successfully promoted and developed. The opportunity for a simplified combined application covering criteria from more than one sphere, e.g. quality and sustainability, may also increase the attractiveness of a scheme.

5.3 National

5.3.1 VisitScotland Quality Assurance Scheme and the independent Green Tourism scheme

VisitScotland Quality Assurance Scheme

This case study looks at the Quality Assurance Scheme operated by Scotland's National Tourism Organisation VisitScotland[28]. It has been selected because it has been used as a tool for increasing the quality of the visitor experience and because it has been recognised in the past as a successful example that others have sought to follow. It also illustrates an interesting and instructive combined approach to quality and sustainability, within the scheme itself and also through its relationship with an independent certification scheme called Green Tourism (please see details below).

Background and development

Scotland's Quality Assurance Scheme was set up almost 30 years ago. It covers accommodation, visitor attractions and food-related businesses. It is a voluntary scheme and participants pay a fee to join. In 2017, it covered around 5,000 individual businesses.

In recent years, there has been some decline in the number of accommodation establishments in this scheme, partly owing to the arrival of user-generated ratings used by online travel agents and travel advisory bodies. However, participation by visitor attractions has increased and the scheme now covers around 98% of attractions in Scotland.

The scheme is driven by a Quality Advisory Committee established by VisitScotland, which comprises representatives of different types of tourism businesses. In this way, it is kept in tune with the needs of the market, with businesses seeing the scheme as belonging to them as much as to VisitScotland.

Key features of the Quality Assurance Scheme

For many years the scheme has focused its star grading on the quality of the visitor experience rather than on the level of facilities provided. This is achieved through a process that assesses a wide range of factors that make-up this experience, such as the warmth of welcome, the level of cleanliness and other aspects of the visit. It also reflects local distinctiveness, relevant to the Scottish experience. The assessment occurs every 1 to 2 years and partly involves conducting a mystery shop[29].

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[28] As a decentralised activity in the UK, tourism in Scotland is the responsibility of the Scottish Government and its related agencies.

[29] Mystery shopping is a tool used to measure the quality of service, or compliance with regulations. The mystery shopper's identity is concealed from the business being evaluated.

The scheme operates through a body of around twenty highly trained Quality Tourism Advisors. It is notable that they are called *advisors* rather than *inspectors*. This reflects a key aspect of the scheme, which is that it concentrates on giving advice to the participants on how they can improve their quality, through reporting and detailed discussions with the businesses at the end of the assessment. The advisors keep up-to-date with the latest market trends and visitor expectations that they then put across to the businesses.

Since 2015, the Quality Assurance Scheme has included a requirement that all businesses have to meet minimum sustainability standards. This is based on a list of 38 actions in nine areas (energy, water, purchasing, transport, natural and cultural heritage, sustainability management, customer engagement and communication, waste and accessibility). Businesses have to demonstrate that they are taking at least 17 specific actions from those listed. They are also encouraged to pursue more actions than this, helped by the advisor, and to demonstrate continuous improvement.

Green Tourism

Green Tourism is a certification and labelling scheme for sustainable tourism. It was established in 1997 as a partnership between VisitScotland and Green Business UK, a private limited company that continues to run the scheme. It operates primarily in the UK, where it has currently over 1,900 certified businesses (around 750 in Scotland). It is regarded as one of Europe's most successful sustainable tourism certification schemes. An important feature is the three levels of award: Bronze (committed, good); Silver (progressive, excellent); and Gold (inspirational, outstanding). Businesses are encouraged to move upwards between the levels.

VisitScotland actively promotes the Green Tourism scheme, alongside the Quality Assurance Scheme, and particularly encourages participation in it by businesses that perform well with respect to sustainability and that wish to have a visible recognition of this through a *green* label.

In recent years, Green Tourism has been independently validated, along with other sustainable tourism certification schemes in the UK, on behalf of the national tourism organisations. This has been seen by all parties as a valuable review and endorsement process. It has led the Green Tourism scheme to widen its criteria, especially in the social and cultural dimension. However, the validator[30] has now recommended that the process should be transferred to the Global Sustainable Tourism Council, in view of their global criteria and established procedures (see Section 5.1.2 on GSTC).

Successes, challenges and issues

VisitScotland's Quality Assurance Scheme has seen many successes. Consumer research showed that it had influenced the choice of 65% of visitors, with 95% reporting that their experience matched the grading. Many countries have expressed a desire to learn from the scheme, seeking information about it from VisitScotland.

As with quality labels worldwide, the scheme has been affected by the growth of user-generated content on tourism websites, leading to user-based ratings. VisitScotland has responded positively to this by enabling businesses to show user ratings alongside their quality star grading. It has also differentiated the scheme from other forms of quality rating by re-emphasising its role in generating quality improvement and investment, assisted by

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[30] The validator is an individual expert appointed by VistEngland on behalf of all the UK national tourism organisations.

practical advice, which is increasingly seen as its real added-value. It has been particularly successful in this respect.

The Green Tourism scheme has been more successful in terms of participation and impact than many other sustainability certification schemes, yet it covers only 10% of the Quality Assured businesses in Scotland.

Implications
A number of lessons can be learned from this experience, including:

- The importance of business participation in the development and management of label schemes.

- The interpretation of *quality*, which needs to be flexible to the type of experience that visitors are expecting in different types of destination.

- The key role of certification and labels as an incentive for improving quality, especially if this can be linked to the direct delivery of advice and support, which may be best achieved at a local level. Any EU level initiative should not deflect from this local support process.

- The chance of influencing sustainability in a higher proportion of businesses by including it as a component of quality schemes and labels, at least with respect to minimum sustainability standards. This underlines the benefits of a combined approach.

- The value of facilitating networking between national schemes so they can learn from each other. A new EU-based network could be most helpful in this regard.

- The value of some form of external validation of sustainability schemes, which could be a function that is supported by the EU.

5.3.2 Effectiveness of sustainable tourism labels in Germany

Introduction
In 2015 and 2017, two scientific studies were carried out, which analysed all the main certification schemes for sustainable tourism in Germany, as well as quality schemes that cover certain areas of sustainability (Strasdas, Balas and Zeppenfeld, 2016; Strasdas, Balas and Teusch, 2017). The first study focused on the question of whether labels achieve actual impacts for overall sustainable tourism and how effective labels are operating. The second study carried out a detailed quality assessment of certification criteria, as well as of the certification procedures – based on internationally accepted standards such as ISO 26000[31], GST-Criteria and ISEAL. The second study focused on business schemes and excluded destination labels because a detailed analysis covering this issue had already been conducted in Germany in 2015.

The conducted studies give a detailed overview about the landscape of sustainability certification schemes for sustainable tourism in Germany and provide useful information that can also be applied in an EU-wide context.

Overall, a mix of methods was used in both studies, such as the internet and literature analysis, a quantitative survey of 238 certified businesses, workshops with tourism experts and key stakeholders, telephone interviews with representatives of tourism associations,

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[31] ISO 26000 provides guidance on social responsibility for businesses and organisations, encouraging them to contribute to the health and wellbeing of society.

ministries and NGOs and a survey of 35 certification schemes in tourism. The following paragraphs present the major findings of both studies.

Market structure of certification for environmental/sustainable tourism in Germany
In Germany, there are 33 certificates offering 43 different certification schemes that award a broad range of tourism businesses and organisations for their sustainability or environmental performance to various degrees. The majority of the certification systems are for accommodation and are based in Germany. However, about half of the labels are partly focusing on the international market and only one third is exclusively focusing on Germany.

There is no single national label even though one certificate was developed to become the umbrella label for sustainable tourism (VIABONO), but it failed in this respect mainly because of its low market penetration and weak acceptance among tourism stakeholders.

Some certificates, such as the Blue Flag or the state recognition of health resort towns, have been around for several decades, but the majority (about two thirds) were created after 2000, with 11 new labels being created only in the last five years.

In total, about 4,400 businesses or organisations are currently certified in Germany, having been awarded at least 4,900 certificates. A large proportion of the certificates are segment-specific (e.g. Wanderbares Deutschland, a quality label for hiking tourism and National Nature Landscapes, a label covering all protected areas in Germany) and focus more on quality than on sustainability. Table 9 below presents the estimated market penetration of these labels for different tourism sectors.

Table 9: Market penetration of labels within the German tourism industry

TOURISM SECTOR	NUMBER OF BUSINESSES	NUMBER OF CERTIFIED BUSINESSES	PENETRATION
Accommodation services	43,465	3,351	**8%**
Destinations (protected areas, health spas, regional areas, etc.)	-	557	**-**
Beaches	2,290	42	**2%**
Camping grounds	2,857	190	**7%**
Golf courses	728	151	**21%**
Marinas	2,170	106	**5%**

Source: Strasdas, Balas and Zeppenfeld (2016)

The number of certified SMEs greatly exceeds those of certified tourism corporations or large hotels.

The degree of market penetration in the hospitality sector is estimated to be up to 5% of all companies in Germany. It is higher for nature parks and for golf courses, but extremely low for tour operators, travel agencies and tourism destinations.

A broad range of institutions offer certification in Germany. Their organisational structures comprise for-profit companies and tourism associations, as well as governmental institutions

and non-profit NGOs. For-profit schemes tend to be segment-specific, thematic and have more certificate holders than non-profit schemes, which are inclined to be more demanding in their criteria, cover more aspects of sustainability, use more sophisticated certification procedures and entail higher certification costs.

The average number of certificates awarded by tourism-related certification organisations in Germany is only slightly over 50 (11 organisations have awarded over 100 certificates, and only three over 250).

There are no publicly available reports on the financial situation of certification organisations. Thus, only general assumptions can be made about the financial viability of these organisations.

Assessment of certification schemes

The majority of the analysed certification systems are classical environmental labels with a focus on ecological criteria. Only one tenth of the 43 schemes cover all sustainability dimensions in a balanced way. The social component, in particular, is underrepresented. Granting a label is almost always subject to fulfilling certain minimum performance criteria. However, this is rarely coupled with the obligation to establish the necessary management structures and processes.

The certification organisations use different compulsory criteria. There is no general basis or set of conditions for the granting of sustainable tourism labels. The majority of certification systems use independent auditing methods. So far, only two schemes in Germany have been formally evaluated and recognised by the GSTC (TourCert and GreenGlobe). Most of the labels are not accredited by any institution nor implement any specific international standards.

When the schemes were assessed (for the German study) against international standards (GST-Criteria, ISO 26000 and ISEAL) it was found that only four out of the 36 certificates analysed reach an acceptable compliance with international standards[32]. A good third cover more than half of the most important criteria recognised as the international standards[33]. All other certificates display various shortcomings or have a rather narrow thematic focus. As a general rule, internationally oriented certificates (some of them with GSTC recognition) score best. Labels that are restricted to the national or regional level often focus on environmental or quality aspects only and can be regarded as weaker in terms of sustainability.

Regarding certification structures and procedures, the analysed schemes cover about two thirds of the main international standards. However, five certificates out of 36 remain dubious in terms of transparency because of the lack of public information[34].

The biggest weakness of most certification schemes for sustainable tourism in Germany is the actual sustainability-coverage of their criteria, i.e. the content of the schemes. Surprisingly, this is also the case for environmental criteria, the focus of most certificates. In this regard, the non-tourism international standards EMAS, the EU-Ecolabel and ISO 14000 score best. Certificates that are tourism-specific mostly cover the classical environmental fields of energy, water and waste management, and, to a much smaller degree, the protection of biodiversity and the challenge of climate change.

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[32] Indicated in green in Table 10 on p. 71.
[33] Indicated in yellow in Table 10 on p. 71.
[34] Indicated in dark red in Table 10 on p. 71.

As expected, the field of socio-cultural sustainability is the least developed area within the schemes. Whereas the sub-criteria of local value generation and vocational training are reasonably covered, favourable working conditions or non-discriminatory practices are hardly mentioned. In general, socio-cultural criteria are more present among internationally oriented certification schemes, as these usually follow a more comprehensive sustainability philosophy.

Finally, the requirements regarding a strategic approach to sustainability are relatively weak among the certification systems. Even though many certificates require certain management aspects (such as sustainable procurement or the active participation of staff) a comprehensive and overarching sustainability strategy is a criterion for only 42% of the schemes.

Table 10: Overview of German sustainability labels

Ran-king	Certification scheme	Type	Coverage in %	Infor-mation not available	Certifi-cation procedure	Trans-parency	Assess-ment system	Ambition of the scheme	Contents	Corporate Gover-nance	Environ-ment	Socio-Culture
1	TourCert – Certification for Tour Operators	S	84%	5%	91%	92%	95%	87%	76%	78%	59%	92%
2	TourCert – Certification for Accommodation	S	82%	5%	93%	92%	95%	92%	70%	76%	63%	72%
3	Travelife Gold certification	S	76%	20%	84%	80%	90%	82%	67%	51%	61%	90%
4	Green Sign / InfraCert	S	75%	18%	87%	89%	82%	89%	64%	61%	60%	70%
5	TourCert – Certification for Tourism Businesses	S	74%	15%	85%	68%	95%	92%	63%	67%	48%	72%
6	Green Globe Standard – Hotels & Resorts	(E)	69%	19%	63%	76%	67%	47%	75%	64%	72%	89%
7	EMAS including reference document for tourism	(E)	63%	1%	76%	81%	76%	71%	50%	56%	79%	15%
7	Green Key	S	63%	21%	77%	84%	76%	71%	49%	51%	56%	39%
9	EU Ecolabel for Accommodation	(E)	62%	5%	72%	90%	72%	56%	52%	61%	78%	17%
10	Viabono – Category Hotel	E	57%	18%	79%	88%	71%	79%	35%	38%	45%	22%
11	Bio Hotels	(E)	55%	23%	88%	81%	86%	97%	23%	35%	23%	11%
12	German Sustainability Code	(S)	54%	11%	51%	66%	30%	57%	58%	48%	55%	70%
12	Qualitäty-Nature Parcs	(Q)	54%	7%	63%	72%	61%	58%	45%	60%	41%	33%
14	DIN EN ISO 14001	(E)	53%	24%	66%	73%	78%	48%	39%	26%	75%	15%
15	Ecoprofit	(E)	50%	14%	56%	45%	82%	42%	44%	40%	48%	44%
16	Wellness-Tree	(Q)	49%	19%	74%	60%	85%	77%	23%	22%	25%	22%
17	Green Pearls	S	48%	17%	45%	48%	42%	46%	51%	43%	50%	61%
17	Ecocamping – Climate friendly business	(E)	48%	19%	58%	75%	55%	44%	39%	27%	67%	22%
17	Wellness Stars Hotel	(Q)	48%	17%	69%	62%	75%	69%	27%	34%	18%	28%
20	Tripadvisor Green Leaders	(E)	47%	25%	52%	78%	42%	34%	43%	39%	57%	33%
21	ehc = eco hotels certified	(E)	42%	22%	64%	50%	61%	83%	20%	18%	42%	0%
22	Ecolabel Alpine club huts	(E)	41%	26%	39%	53%	40%	23%	43%	51%	67%	11%
23	Certified Green Hotel	S	40%	3%	42%	39%	70%	19%	38%	24%	47%	44%
34	Bavarian Ecolabel for Hospitality	(E)	39%	2%	57%	76%	62%	33%	22%	15%	40%	11%
25	Quality Hospitality provider Hiking Germany	(Q)	38%	12%	65%	65%	69%	60%	12%	6%	3%	26%
26	DEHOGA Environment Check	(E)	37%	13%	54%	79%	45%	38%	20%	19%	30%	11%
27	Blue Flag	(E)	35%	23%	51%	70%	62%	22%	20%	14%	28%	17%
28	Quality track Hiking Germany	(E)	34%	15%	64%	66%	67%	60%	5%	7%	3%	4%
29	Partner of National Landscapes	(E)	33%	4%	45%	61%	51%	23%	21%	31%	11%	22%
30	Quality management canoeing	(Q)	32%	21%	45%	70%	51%	15%	19%	38%	10%	10%
30	bett+bike	(Q)	32%	10%	57%	79%	64%	28%	6%	15%	3%	0%
	Proofed Sustainability (di-no.eu)	S	81%	80%	70%	35%	80%	94%	93%	96%	83%	100%
	German Society for sustainable building (DGNB)	(S)	48%	34%	60%	61%	75%	44%	35%	63%	43%	0%
	Quality Management Golf & Nature	(E)	42%	33%	46%	57%	55%	27%	38%	35%	48%	30%
	Ecocamping - Management for camp grounds	(E)	29%	50%	31%	50%	36%	8%	26%	35%	43%	0%
	Blue Swallow	(E)	18%	34%	19%	24%	15%	20%	17%	13%	24%	15%

Legend: S – Sustainability; Q – Quality; E – Environment; (those shown in brackets are the judgement of the authors based on desk research, i.e. not explicitly specified by the label).
Source: Strasdas, Balas and Zeppenfeld (2016)

Impacts of certification in sustainable tourism in Germany

No benchmarking systems exist that would allow a comparison of the sustainability performance of certified companies/organisations with those that are not certified. According to certified businesses, the certification process has resulted in an enhanced sustainability performance and certain advantages for themselves. However, the positive effects are reported to be minor.

Improved sustainability performance could be observed mainly in internal management and, sometimes, through reduced energy and resource consumption, as well as through more local procurement. Advantages for the certified businesses were mostly an improved image and, to a lesser degree, cost savings or increased demand.

Nevertheless, the majority of the surveyed companies/organisations were satisfied with their certification system and would like to get re-certified. They prefer systems that *fit* their organisation. The main reasons for being certified are reported to be a sense of responsibility for the environment, as well as the expectation of gaining reputational benefits and achieving higher quality. This means that both societal considerations and self-interest play a role.

Less ambitious certification systems that focus on a narrow range of criteria, especially in the nature tourism segment, appear to be more successful in terms of market penetration than those who have higher aspirations to achieve sustainability in a broader sense.

The interviewed experts and stakeholders of the two German studies share the view that certification has had limited effects so far regarding the sustainable development of tourism in Germany. However, they concur that certification is indispensable as a measurement and orientation tool.

All experts and stakeholders interviewed for the two German studies regard a high-quality certification system, as well as transparency and credibility, as important. In their views, exceptions should only be allowed initially to make it easier for businesses/organisations to gain access to certification.

However, no clear consensus appears to be among tourism experts on how high-quality sustainability certificates can be made more effective in the marketplace. As a tendency, environmental and social organisations demand more governmental intervention, whereas most tourism associations reject the idea.

Government-backed accreditation of certification systems, based on an obligatory minimum standard, does not seem to be realistic in the near future in Germany. However, as a compromise and with the support of the federal Government, a non-binding standard for the certification of sustainable tourism companies could be developed (similarly to the recently created standard for sustainable destinations in Germany). In addition, almost all interviewed stakeholders would recommend a European or even a global guidance concerning a minimum standard or even an accreditation scheme.

As supporting strategies, all stakeholders were in favour of communication and awareness-raising measures to reach businesses and customers that are inclined towards sustainability. A clear quality standard for certificates would be a precondition for this.

Main conclusions stemming from the two German studies

- It is desirable to broaden the thematic scope of most certificates towards a comprehensive concept of sustainability. Sustainable development is the prevailing

paradigm of the 21st century. For an international sector such as tourism, focusing on certain environmental aspects or service quality alone would be an outdated approach. In particular:

- aspects of social sustainability should be given more emphasis by most certification schemes. These should include staff concerns (wages, work hours, diversity) and fair-trade practices, among others.

- there is also a need to catch up in some environmental fields, especially regarding climate change and biodiversity. Furthermore, attempts should be made to measure environmental criteria in quantitative terms by using benchmarking rather than just working with yes/no options.

- The certification organisations should pay more attention to strategic sustainability management among their certified companies by developing corresponding criteria.

- While broadening their thematic approach, some certification systems could improve their certification structures and procedures towards more transparency and credibility.

- For consumers, the large number of certificates with different levels of quality is confusing, especially in the accommodations sector. It would therefore be desirable to consolidate this market.

- By contrast, tour operators and travel agencies (including online booking platforms) are seldom certified, thus restricting choice for consumers. It is desirable to guide these sub-sectors towards more sustainability since they have an important multiplier effect.

- Finally, the authors of the German study maintain that a national minimum standard for certification would be conducive to the further promotion of sustainable tourism in Germany, similar to what has been successfully implemented in the food sector. The standard developed in the study, which had been discussed with relevant stakeholders, was seen as providing a substantial basis for such an endeavour.

5.3.3 Q Calidad Turística – Q Label

Overview
The Q Label is granted by the Institute for Spanish Tourism Quality (ICTE), a certification body of quality systems for tourism companies, formed by the leading national tourist associations in Spain - such as the Spanish Confederation of Hotels and Tourist Accommodation (CEHAT) and the Tourist Association of Ski Resorts and Mountains of Spain (ATUDEM).

The Q Label has been operating for more than 15 years in Spain, the largest European tourism destination by revenue. The label has been a model for quality labels across Europe. In 2017, there were 2,013 Spanish establishments certified in 23 sub-sectors of the tourism industry. The length of operation and the spectrum of businesses that have adopted Q Label has attracted academic interest, which resulted in completion of several studies on the impact of quality labels. This case study demonstrates how a single quality label has been successfully applied across the tourism sector, encompassing a wide variety of business types and services.

How the scheme works
The label is granted to establishments offering the required level of quality, safety and professional service. Although the overall requirements are standardised, criteria are adapted according to the tourism sub-sector and the type of offer within the same sub-sector: for example, the spa of a 5-star hotel is assessed differently from a spa of a 3-star hotel.

Requirements and criteria are often revised to adapt to the constantly changing tourism market. The general scheme is based on 115 quality criteria in 6 areas (at least 50 of the compulsory criteria are needed for the certification):

- Management;
- Infrastructure and facilities;
- Welcome and reception;
- Cleaning and maintenance;
- Safety and environment; and
- Marketing.

The sequence of quality assessment is as follows:

- General rules affecting safety issues, hygiene, etc.;
- Tourist compulsory rules;
- Self-evaluation based on a common methodology but adapted to the characteristics of each sub-sector and product;
- Improvement plan;
- Audit and certification by external accredited certification company;
- Continuous improvement;
- Improving competitiveness;
- Improved profitability;
- Improved customer satisfaction; and
- Warranty service.

The certification of the Q Label is fully compatible with ISO standards. An auditor recognised by the ICTE must conduct a compulsory external audit every year.

The impact of the scheme
Some key findings from the studies undertaken on the Q Label are set out below.

The Q Label does not offer a clear marketing advantage. The attitude and behavioural intentions of tourists are not significantly different towards hotels with the Q Label than they are towards those without it (Castañeda García, Rodríguez Molina and Herrera Camacho y Carm, 2013). Although ICTE claims that 40% of Spaniards recognise the Q Label, there is no evidence it has a value in the purchase decision process. The high level of recognition may be due to a large communication campaign by McDonalds, who in 2010 became the first restaurant chain to be awarded by the Q Label.

Quality labels and certification schemes, including Q Label, influence the quality management process and performance of businesses. Certified companies in the tourism industry implement ISO 9000[35] more for internal reasons, such as improving processes and procedures or products and/or services, rather than for external reasons, like the image of the company or as a promotional or sales tool (Djofack. and Robledo Camacho, 2017). Although the implementation of the Q Label generates costs for the company, the empirical results confirm that these are amply compensated by higher income and financial results. Hotels offering higher levels of service have been found to generate greater added value and, therefore, higher levels of productivity (Tari-Guilló and Pereira-Moliner, 2012). Further

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[35] The ISO 9000 group of standards addresses aspects of quality management for companies and organisations who wish to improve delivery of their products and services.

research studies confirm that, in general, the effort made by Spanish hotels to reach the standard required by the Q-Label is reflected in higher customer satisfaction, since the consumers score them higher (in the review system of Booking.com) than hotels that do not have it. However, the impact of quality certification is not uniform and depends on the category of the hotel (Fuentes, Hernández and Morini Marrero, 2016).

Implications

This long-standing quality label for accommodation establishments has demonstrated that:

- Flexible criteria can be used to certify a wide range of business types and levels under one label.

- Quality label and certification schemes can serve as an incentive for businesses to improve their quality and this often results in enhanced performance.

- Quality labels should be judged on their ability to influence internal quality management and improve the quality and performance of the participating businesses, rather than just on external factors, such as market visibility.

Figure 17: The standards supporting the Q Label

Source: SBQ Consultores (n.d.). Retrieved from https://www.sbqconsultores.es/las-normas-detras-la-q-calidad-turistica/

5.3.4 Green Scheme of Slovenian Tourism

Introduction

Slovenia is one of the first countries to adopt a structured national programme for the development of sustainable tourism on different levels. The Slovenian Tourist Board (STB)[36] has pledged itself to sustainable development in line with national strategic guidelines. It places the implementation of sustainability at the very heart of its operations. As a result, tourism service providers and destinations are also switching to sustainable development.

Green Scheme of Slovenian Tourism (GSST)[37] is managed by the STB, which developed the scheme, offers educational support and establishes promotional channels in the international tourism market for the promotion of Slovenia's green destinations and service providers. Its accredited partner, the Institute of Sustainable Tourism – GoodPlace, has a licence to conduct assessments using the Green Destinations Standard and is a Green Destinations partner. Green Destinations is a non-profit organisation based in the Netherlands that runs a sustainability certification scheme for destinations based on a GSTC-Recognised standard.

The GSST is an example of a certificate that works with already established structures and labels, with the result that they themselves become strengthened.

Objectives and Characteristics

GSST is a tool developed at the national level that carries out the following tasks under the *Slovenia Green* umbrella brand:

- bringing together all the efforts directed towards the sustainable development of tourism in Slovenia;
- offering tools to destinations and service providers that enable them to evaluate and improve their sustainability actions; and
- promoting these green endeavours through the *Slovenia Green* brand.

The scheme's key strategic objective is to introduce sustainable models at two levels: destinations (municipalities and parks) and tourism service providers (hotels and travel agencies). In 2018, restaurants and tourist attractions will be added to this second level. All the objectives of the strategic guidelines are in line with sustainable development and demonstrate concern for the economic, social, cultural and natural environment. The scheme has five characteristics, which include:

- a comprehensive and developmental approach;

- a national character;

- an international comparability;

- a foundation on global criteria: the Green Destinations Standard and the European Tourism Indicators System (ETIS); and

- a tool for positioning and promotion.

Slovenia has become the world's first country to be declared a green destination. This award, granted in 2016, was based on an assessment by Green Destinations which identified 96% compliance with the 100 criteria within its certification standard. The Slovenian capital city of Ljubljana was also declared one of the Top 100 Sustainable Destinations.

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[36] The Slovenian Tourist Board (STB) is a national tourist organisation responsible for planning and carrying out marketing policies for Slovenia's comprehensive tourist offerings. It is also entrusted with the task of developing Slovenian tourism. STB is a public organisation financed by the Ministry of Economic Affairs.

[37] Official website of the GSST: https://www.slovenia.info/en/business/green-scheme-of-slovenian-tourism.

Processes for obtaining the Green Scheme of Slovenian Tourism certificate
The two levels (i.e. destinations and tourism services) are closely connected. The destination motivates key interested parties (service providers) to operate sustainably and carry eco-labels, since a green destination can only be credible if it has a critical mass of certified service providers. Destinations follow a programme that was established in partnership with the Green Destinations organisation and is directed by the STB, using an already elaborated assessment system for sustainable tourism.

The process of certification of the destination must follow 11 steps (see Figure 18 below). Firstly, the destination must assign a Green Coordinator, then a Green Team must be formed, which together are responsible for raising awareness of the initiative. The fourth step is to sign the Slovenia Green Policy. After this, surveys must be conducted to collect information and data on the destination regarding criteria in six action fields of the green scheme[38]. The certificate comprises 100 criteria and 131 indicators[39]. After the data has been gathered and the results analysed, an action plan is written, including the definition of the local character and its green Unique Selling Proposition (USP). The final two steps comprise the on-site visit by external auditors and the implementation of the action plan by the Green Team.

Figure 18: Steps for GSST certification

1. Assigning Green Coordinator
2. Forming Green Team
3. Raising Awareness
4. Signing the Slovenia Green Policy

5. Surveys (3 groups)
6. Collection of Data
7. Result

8. Action Plan
9. Definition of Local Character and Green USP
10. On-Site Visit
11. Implementation of Action Plan
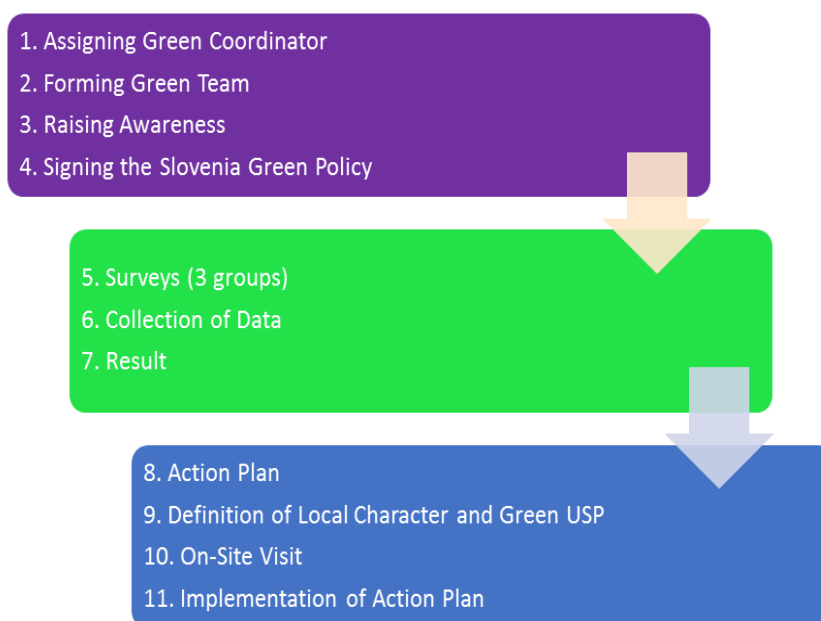
Source: Adapted from Apih (2017)

In order to be included in the GSST, tourism businesses have to follow three steps:

1. Enter the scheme;

2. Sign the Slovenia Green policy; and

3. Present a valid certificate from the list of endorsed certificates.

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[38] The six fields of action include: Destination Management; Nature, Animals and Scenery; Environment and Climate; Culture and Tradition; Social Well-being; Business and Hospitality.
[39] The Green Destination Indicators can be found here: http://greendestinations.info/wp-content/uploads/2016/04/Green-Destinations-Standard.pdf.

A key aspect of the programme is that businesses can use a number of different certification systems, previously approved by the STB. Examples of the approved schemes are shown in Figure 19 below.

Businesses also have access to financial support from the Slovenia's Ministry of Economic Development.

Figure 19: Examples of sustainability labels approved under the GSST

Source: Apih (2017)

Implementation
The scheme was initially implemented in Slovenia in 2015 with the first call for businesses (tourism service providers) and destinations. Two more calls followed, making it an annual event. There are already 23 destinations, 18 accommodation providers, 3 parks, and 2 travel agencies that have been awarded the Slovenia Green certificate. At the end of 2017, a further 16 destinations are in the process of obtaining the Slovenia Green label.

Implications
The presence of a national strategy between the STB and other governmental organisations is considered to be an important factor contributing to the success of GSST. This approach has demonstrated the opportunities presented by existing organisations and certification schemes at a destination and business level, which have been coordinated within Slovenia to deliver a comprehensive sustainable tourism programme.

5.3.5 Partner-Initiatives for National Landscape in Germany and ServiceQuality Germany

Introduction
This case study illustrates two certificates that are mainly focusing on small and medium-sized tourism businesses and that work as decentralised, flexible, yet highly connected systems. These schemes are very successful in Germany and provide good examples of how regional needs can be fulfilled even though the certification systems are set up as national schemes.

Partner-Initiatives for Natural Landscapes in Germany

In 2008, the national parks, biosphere reserves and nature parks in Germany created a certification and partner-network system for tourism businesses within these natural landscapes.

The aim of the initiative is to enhance a closer cooperation between stakeholders in order to ensure sustainable regional development. The partner-initiatives also seek to establish a better acceptance of protected areas by the local population, as well as to raise awareness-among policy-makers. An additional advantage is how tourists become better informed and sensitised through well trained business partners that identify themselves with the natural landscape. In 27 initiatives, more than 1,000 partners already offer sustainable tourism services for overnight stays, gastronomy, nature experiences and much more. Thus, this system is one of the most successful tourism certification schemes in Germany.

The system itself is being coordinated by EUROPARC Germany (the national member of the European federation for protected areas). EUROPARC is providing guidance through a general quality and sustainability standard. This standard includes recommendations for the establishment of a regional partner-initiative as well as minimum criteria for each certified partner. The following aspects are covered:

- the existence of a written contract that includes a commitment to sustainable business practices, as well as identification with the regional landscape;

- the recertification every three years;

- the active participation in the network of all partner-initiatives;

- the establishment of an independent consortium of experts that decides on the certification of each business and is responsible for the development of the criteria;

- the provision of information about the partner-initiative on the regional website;

- the clearly written description of each certified business;

- the use of a consistent logo and the corporate design of the national natural landscapes (EUROPARC); and

- the implementation of three core aspects with 17 minimum criteria for certified businesses: identification with the natural landscape (four criteria); sustainable, environmentally friendly and regional practices (four criteria); quality and service practices (nine criteria).

The management of each protected area is responsible for the implementation of the partner-initiative. The minimum standard needs to be fulfilled, however further criteria can be added and adapted to the special needs of each protected area or according to the business structure within the area. This makes the system very flexible and tailor-made for each destination. Also, the actual administration of the system is undertaken in the region by representatives of the protected areas, which creates a high level of identification for businesses and the public.

The overall guidance is covered by the national body of EUROPARC, which guarantees the professionalism and reliability of the system. However, there is no clear accreditation process for each single partner-initiative: it is not considered necessary because the protected areas already have similar strategic objectives and are organised under the umbrella of EUROPARC Germany.

ServiceQuality Germany

The certification scheme ServiceQuality Germany (SQD) was originally operated under licence from the national Swiss Quality Label. The licence was bought in 2001 by the German province Baden-Württemberg.

Seven other federal states had joined the scheme by 2007, when a central cooperation body, ServiceQuality Germany, was established. The aim of this national body was to create consistent requirements, as well as a harmonised communication and marketing strategy. The national body was coordinated by the German Tourism Association, which is the umbrella association of all German tourism destinations. Since 2010, all 16 German federal states are represented in this national body. In 2016, there were around 3,000 SQD-certified businesses in Germany.

The system has a decentralised structure, similar to the partner-initiatives of the natural landscapes. Regional (at the federal state level) Destination Management Organisations (RDMOs) operate as coordinating offices of SQD and are regional certification bodies, being full members of the ServiceQuality Germany. The national body supports the regional organisations and coordinates revision and development processes of the scheme. All members need to finance themselves but are mostly supported by regional public funding. The national office is financed by charges levied on each SQD member.

The scheme itself is structured on three levels:

Level I Sensitise	Level II Measure	Level III QM-system
Self-evaluation of the business Basic knowledge of quality management	Evaluation of management structures and service quality mystery checks	Introduction of systematic quality management with a continuous improvement system

The assessment is done by the regional offices. There is no external auditing system and the overall system is process-oriented without major minimum performance criteria. This flexible approach is especially suitable for SMEs.

In 2017, SQD started the revision of its overall certification process. In future, it will be completely modular. Businesses will be able to choose several quality modules and will have to fulfil a certain number of these modules in order to achieve one of the three levels. SQD is planning to include sustainability as one of the modules. By doing that, it would be the first national quality label in Germany combining quality and sustainability measures.

Implications

This case study shows that national certification schemes can still reflect local differences, when structured in a flexible way. The Partner-Initiatives for National Landscape in Germany and the ServiceQuality Germany certification schemes are very successful because of their decentralised approaches.

The partner-initiatives follow a minimum standard which includes criteria for certification procedures, as well as for different sustainability/quality dimensions (but they are also highly

flexible with respect to additional elements of the scheme). This enables a regional adaptation and enhances acceptance among local stakeholders.

ServiceQuality Germany has one standard but offers several levels of certification. Also, it is administered by regional destination management organisations (RDMOs) that have the organisational and financial capacities and local knowledge to enable them to implement the scheme in an efficient way. A national certification body is guaranteeing the quality of the monitoring and evaluation process of the label.

The implication is that an effective European label or standard would need a certain flexibility for regional differences, for example by providing a standard set of minimum criteria with the possibility of individual adaptations in certain regions and/or for special business segments. The two presented labels in this case study successfully demonstrate that a decentralised structure (mainly through having certification offices at regional levels) creates a higher acceptance among local stakeholders, spreads finances and facilitates market penetration of the label.

5.3.6 Nature's Best

Background and development
Nature's Best is a Swedish quality labelling scheme for Ecotourism. It was launched in 2002 during the UN *Year of Ecotourism* and represents the first Northern Hemisphere quality labelling scheme for Ecotourism. The Swedish Ecotourism Society took the lead in developing this label, supported by the Swedish Nature Conservation Association and the Swedish Travel and Tourism Council. The common goal is to create more quality eco-tourism in Sweden. There are now 70 tourism businesses approved by the label, covering a wide range of services and activities, including boat trips, guided tours, accommodation, local foods and crafts, etc. Based on three years of practical experience, the criteria were revised in 2005, supplementing, clarifying and improving the requirements.

Figure 20: Nature's Best logo

Source: Retrieved from Natures Best official website (n.d.)

This case study provides an interesting and illustrative example of how quality criteria can be applied to more environmentally friendly products and services, demonstrating that the two are not mutually exclusive.

The Nature's Best Criteria
The criteria are based upon six principles:

1. **Respect the limitations of the destination** – minimise the negative impacts on local nature and culture. Ecotourism is about preserving what the visitor has come to experience. The ecological and cultural capacity of each area must be respected. Tour operators must have a solid knowledge of the destination, local presence and work closely with others present in the area.

2. **Support the local economy**. Ecotourism is about community development. Conservation can easily fail if local people object to it, whereas tangible benefits from tourism are a positive force. Each visitor contributes to the local economy by renting rooms, hiring local guides and purchasing goods and services.

3. **Make all the operators' activities environmentally sustainable**. Eco-tour operators must set a good example with sound environmental practice. Approved operators must have policies to minimise environmental impact by prioritising in areas such as: collective transport, sustainable lodging, waste management, etc.

4. **Contribute actively to nature and cultural conservation**. Ecotourism assumes responsibility for the protection of biodiversity and special cultural values. This means supporting nature conservation in various ways.

5. **Promote knowledge and respect and the joy of discovery**. Ecotourism is about traveling with curiosity and a respectful mind set. Approved operators are competent hosts providing visitors with a good introduction to the area. Good advice and guidance are often the keys to a memorable trip.

6. **Quality and safety all the way.** Ecotourism is quality tourism. Approved tours must meet and even exceed customers' high expectations. Safety issues are taken very seriously, approved tour operators are trusted suppliers and partners (Natures Best, n.d.).

Organisations wishing to be accredited must pay joining fees, attend a mandatory training course and have an inspection visit. They must meet all the core criteria as well as at least 25% of the bonus criteria[40]. Additionally, three references must be provided from someone outside the organisation that can confirm the quality of the prospective organisation or service. Once approved, members can use the logo and benefit from being listed on and have a link to the Nature's Best website.

Accreditation of sustainability certification schemes
The scheme criteria also align to a significant extent with sustainability schemes. Criteria include provisions ranging from minimum 50% local procured goods, services and staff costs, to respecting any local conservation values, and specifications for the organisation's vehicles emissions standards. For those areas where there are already existing labelling schemes, these are adapted for the appropriate category, i.e. the purchase of accommodation, office supplies, food and cleaning chemicals criteria are, as far as possible, sourced through businesses within existing environmental labels (Nordic Swan, Green Key, etc.).

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[40]   There are also specific criteria to be met for selected activities such as hunting or cave tours.

Implications

The system was designed to market Swedish Ecotourism and now has over 220 listed offers available to visitors. Whilst the scheme remains solely based in Sweden, it is still relatively young and attracting interest internationally. Consequently, it is considering expanding via an alliance with other Nordic countries, or those with similar habitats. Some shortcomings have been highlighted, such as the balance between the cost of joining compared to the limited additional bookings made via the label website. However, the scheme has seen increases in the number organisations developing and offering travel opportunities. The criteria are positive in promoting local benefit and conservation as a part of the certification process.

Although, a relatively small niche scheme, this label clearly demonstrates the compatibility of many quality, sustainability and environmental criteria. Growing interest in the scheme shows that other businesses and organisations recognise the benefits of blending criteria to create meet the needs of local communities, as well as tourists.

6 CONCLUSIONS AND RECOMMENDATIONS

KEY FINDINGS

- Tourism certification and labelling should be seen in the context of supporting wider EU policy commitments.

- Any EU initiative needs to reflect the complex and changing world of tourism quality and sustainability labels in Europe.

- **European intervention is broadly welcomed but requires sensitive handling** and should be directed towards providing support, coordination and reliable and equivalent standards, rather than a new European tourism label.

- **Quality labels for tourism** must reflect the reality of user-generated ratings, while supporting other approaches where appropriate.

- European level engagement in strengthening and coordinating **tourism sustainability certification** should build on established global standards and processes.

- Opportunities to strengthen **integration between quality and sustainability in tourism should be pursued where possible**.

- European level initiatives should recognise the need for certification schemes to **foster local stakeholder participation and support**.

In the view of the above findings of the study, it is proposed to:

- Set up an initial meeting with leading quality and sustainability schemes/labels in Europe, leading to the **establishment of an ongoing working group/think tank**.

- **Enter negotiations with the Global Sustainable Tourism Council to establish a joint initiative to promote GSTC recognition of standards** and accreditation of certification schemes, with European added-value.

- **Work with national tourism agencies and industry bodies** to strengthen and coordinate existing tourism quality labels in Europe and their effectiveness in raising service quality.

- **Establish a promotional platform and a programme** of on-going networking and support for sustainability and quality certification schemes and labels.

- Promote local destination-level initiatives.

- Require **contracting of certified tourism businesses in EU procurement and project funding.**

This final chapter presents a set of conclusions on European tourism labelling for quality and sustainability, considering the current context of labels in Europe and issues affecting the desirability and possibility of introducing an EU-harmonised certification system. The conclusions are based on the evidence obtained from the situation analysis, surveys and case studies presented in this study and from the experience of the expert team that has conducted the study.

This is followed by a concise set of recommendations on the approach and actions that should be taken.

6.1   Conclusions

a) Tourism certification and labelling should be seen in the context of supporting wider EU policy commitments.

Strengthening of the competitiveness and sustainability of European tourism is an overarching goal of the EU, which could be positively affected through support of tourism certification and labelling.

The policy backdrop for this is not only the very significant contribution of tourism to the economy of the EU and the importance of retaining a strong global market position, but also the commitment to deliver on *Horizon 2020* and the UN's *2030 Agenda for Sustainable Development* with its 17 Sustainable Development Goals.

Harmonised standards, certification and labels play an important role in guiding and providing confidence to consumers travelling to and within the European Union. However, this study has underlined an equally important supply-side role of the harmonised standards, certificates and labels in encouraging and incentivising businesses to improve their quality and sustainability. The national case studies (such as those for Spain and Scotland) have suggested that this is where certification schemes can exert their greatest influence. This needs to be reflected in the level and nature of the potential intervention.

b) Any EU initiative needs to reflect the complex and changing world of tourism quality and sustainability labels in Europe.

This study has identified a large number of quality and sustainability certification schemes and labels in the EU, which form a rather fragmented picture. However, in part this reflects the presence of various small scale thematic or locally delivered schemes that have had a beneficial effect on their limited membership base, which might not have resulted from larger schemes. Fragmentation is not always negative.

Nevertheless, it is an evolving situation and the recent trends observed include:

- The rise of user-generated ratings is challenging the need for quality certification schemes and resulting in some decline in the number of businesses that participate in them.

- Increasing costs and reducing governmental subsidies are leading to higher prices for participation in schemes.

- A weak resource base is preventing schemes from investing significantly in promotion (with consequent limited visibility).

- A number of schemes, nevertheless, are retaining or slowly increasing their membership, especially where promotion has occurred.

- A number of relatively successful global and transnational sustainability certification schemes are spreading amongst businesses in different countries.

- A small number of schemes are emerging that are certifying the sustainability of destinations as distinct from individual businesses.

These developments suggest that an initiative to improve coordination between existing schemes and to raise awareness of them could be very helpful.

c) European intervention is broadly welcomed but requires sensitive handling and should be directed towards providing support, coordination and reliable and equivalent standards, rather than a new European tourism label.

The stakeholder surveys revealed that a significant majority welcomes the idea of a European initiative to support tourism certification and labelling. Positive reasons for this included:

- Identifying and promoting common standards in different Member States;

- Increasing visibility of labels and their recognition by international travellers; and

- Reducing fragmentation and confusion in the market place.

However, there was also notable scepticism and negativity, especially towards the idea of introducing a new European label, owing to concerns about:

- A centralised approach being too inflexible to embrace different local values and needs;

- Lack of effectiveness and take-up of previous and existing European level labels;

- Competition with existing schemes leading to duplication and loss of viability; and

- Adding more burdens and costs to businesses.

Results from the case studies and more general experience confirmed concerns about the desirability and practicability of introducing a new certification scheme and label. Existing labels have taken many years to become established, as in Spain. More can be done to work with and promote what is there, as in Slovenia, rather than establish a new label.
Four alternative forms of EU intervention were put to stakeholders in the surveys:

1. Do nothing;

2. Provide a programme of support and assistance;

3. Introduce a European standard as a benchmark for certification schemes; or

4. Introduce a single European label.

Options 2 and 3 were equally well supported and considerably more favoured than the other two alternatives. These measures would raise the profile of existing labels, both to tourism businesses and consumers, and would encourage incremental increases in the quality and sustainability of EU tourism. Given that tourism is a competitive global market, this is critical in maintaining Europe's status as a global destination.

Although establishment of a single EU label for tourism services turned out not to be the most preferable option by the stakeholders participating in the surveys conducted for the purposes of this research, this study has attempted to assess possible cost of its establishment and running. The following facts have been established:

- there is a lack of data on the financial performance of most labels, and

- the cost of running a label can vary depending on the level of market surveillance (number of criteria, number of audits per year, etc.).

However, figures of €2 million have been quoted for the launch and promotion of Qualité Tourisme in France (Renda et al., 2012), whilst the annual cost of running the EU Ecolabel is reported to be around €5 million annually. The net cost to the EU will depend on several factors, such as:

- to what extent the administration of the label is undertaken by Member States, industry bodies, or other organisations,

- the complexity of the certification process, and

- what costs might reasonably be passed to the organisation being certified.

d) Quality labels for tourism must reflect the reality of user-generated ratings, while supporting other approaches where appropriate.

A user-generated rating cannot be regarded as a quality label as it does not involve a pre-defined standard or an auditing process. However, such ratings now extensively influence consumer choice, with far more penetration and impact than quality labels. Recently, various applications have been introduced to provide guidance to tourism businesses on how to improve their quality informed by user-generated ratings. European initiatives should support (rather than ignore) this reality.

There is still a role for certain kinds of quality ratings that provide reassurance of minimum standards and an objective assessment of facilities and services, especially if these are applied in parallel with user-generated ratings (rather than as an alternative to them). Common definitions and benchmarking of standards could be beneficial here. However, this may be best left to industry and associations to deliver, as with the Hotelstars Union scheme.

Whilst it is difficult to determine what is the long-term impact of online user-generated rating systems, their acceptance by consumers is already affecting tourism businesses and services. It is important that they are recognised by businesses as a marketing opportunity, particularly as some destination marketing organisations are using these at a local level, and in order to positively influence them, businesses understand how the reviews and ratings are generated.

e) European level engagement in strengthening and coordinating tourism sustainability certification should build on established global standards and processes.

The sustainability agenda is very wide, covering social, cultural and economic impact, as well as environmental issues. A key challenge is to ensure that sustainability certification schemes are covering the same broad criteria. This is a legitimate and valuable role for centralised intervention. However, the UN and industry backed Global Sustainable Tourism Council is already fulfilling that function (please see GSTC case study in Section 5.1.2.).

The stakeholder consultations for this study led to frequent reference to the GSTC and the participants called for any European initiative to work with it rather than establish a similar process in competition. On the other hand, there was also some lack of awareness of the GSTC, which is still falling short of participation targets, suggesting that improved outreach and other mutual benefits could be achieved from a partnership approach.

f) Opportunities to strengthen integration between quality and sustainability in tourism should be pursued where possible.

The stakeholder consultations revealed significant support for the creation of one standard that combined quality and sustainability, recognising that they are both important in achieving the common goal of sustainable development through tourism.

Some sustainability standards (including the GSTC) already refer to quality, but mostly just as a process (e.g. obtaining consumer feedback and handling complaints) rather than as an identified level of facility provision or customer satisfaction. Some quality standards require

basic levels of environmental management. On the other hand, areas of conflict between quality and sustainability requirements (e.g. the provision of certain luxury goods and services for consumers which have negative environmental impact) have been identified in certain schemes, which need to be addressed. These are first steps towards integration but the path to a single standard, and its practical application is potentially problematic and requires more work.

The presence of a number of different and separate issues relating to quality on the one hand and sustainability on the other (for example, with the application of consumer ratings which really only apply to quality) may point to a need to maintain some separate treatment of them.

g) European level initiatives should recognise the need for certification schemes to foster local stakeholder participation and support.

The value of using certification schemes and labels to influence business improvements, investment and performance has been referred to above. The case studies have shown how this can be helped by guidance materials and also by personal engagement and the provision of direct advice and other support by the schemes' managers. This type of activity should be encouraged more widely. It suggests that any more centralised initiative, supported by the EU, should strengthen rather than undermine locally administered processes.

Similarly, it is important to continue to encourage successful thematic schemes, relating to particular types of products, visitor experience or market niches, such as the *Nature's Best* example, where they have influenced the provision of specific services by producers and provided visitors with a clear indication of where they can be found.

Finally, the growing role of certification and labels in supporting, and being supported by, business-to-business (B2B), business-to-government (B2G) (including destination bodies) and business-to-consumer (B2C) relationships, should be recognised. Thus, can be facilitated by improved awareness and networking at all levels.

6.2   Recommendations

The conclusions made above assume a sequential approach, i.e. consultation before action. This will encourage the participation of Member States, industry and other stakeholders, by boosting ownership of the actions. It is likely that these activities would need to be coordinated, for example through the appointment of an expert in the field of tourism labelling. The coordinator would not necessarily need to be external to either the EP or EC, but the cost of employing someone, at least part-time, and providing a budget for travel and other costs is likely to be €100,000 over a two-year period.

Much of the legislation relating to tourism focuses on the stipulation of minimum standards, such as fire security for hotels, for example. As one of the main purposes of tourism labelling is to define a set of '*requirements that go beyond legislation*' and that participation in schemes is voluntary, it is deemed unnecessary for any new legislation (or the harmonisation of existing legislation) to be considered. Such action may increase barriers to participation given that many respondents commented that any proposed scheme should place '*no additional financial or administrative burden on businesses*'.

As concluded in the previous section, the majority of the respondents participating in the study's surveys welcomed the idea of the EU intervention either in the form of a comprehensive programme of support and assistance or through the introduction of a European standard as a benchmark for certification schemes. Taking these views into

account, as well as given the EU's previous experiences with the introduction of an umbrella label for quality of tourism services, the following recommendations and actions are proposed to be undertaken at EU level:

1. **Set up an initial meeting with leading quality and sustainability schemes/labels in Europe, leading to the establishment of an ongoing working group/think tank.**

This should build on the work and findings of this study and lead to a further refinement and agreement of the approach and actions of the EU to reinforce tourism certification in Europe. This approach is more likely to gain the support of these schemes and improve the likelihood of a sustainable EU labelling scheme. The most appropriate body to take this forward is likely to be the EC's Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG-GROWTH), through the Tourism Unit, possibly financed through the COSME Programme. The estimated cost of this action, assuming all costs were met by the EC (travel, accommodation, etc.), for up to 30 participants would be €30,000.

2. **Enter negotiations with the Global Sustainable Tourism Council to establish a joint initiative to promote GSTC recognition of standards and accreditation of certification schemes, with European added-value.**

All sustainability certification and labels for tourism in the EU should be based on standards that are GSTC-Recognised and schemes whose processes are GSTC-Accredited. The EU should seek to add value to this by:

- Promoting participation in GSTC processes through publicity, awareness-raising and incentives. This would need coordination with the GSTC, which the EU could support in this through direct funding or the appointment of an external coordinator. The estimated cost of this through an external coordinator is €40,000-50,000 per annum.

- Identifying benchmark levels and targets for each of the GST-Criteria and indicators that are realistic and achievable in a European context. Initially this would be a process of identifying the appropriate level of benchmark, which may lead to some individual certification schemes seeking GSTC recognition. Depending on the demand for such recognition, it may be appropriate for the EU to support this process, for example, by reimbursing some of the costs of meeting the standards.

- Requiring high levels of transparency and data exchange between participating schemes. This would be a key requirement for the credibility of an EU label and would need to be a prerequisite for participating in the scheme. The creation of a database, including the inclusion of benchmarking options, is estimated to be €50,000 based on the experiences of TourCert in Germany.

3. **Work with national tourism agencies and industry bodies to strengthen and coordinate existing tourism quality labels in Europe and their effectiveness in raising service quality.**

It is important to recognise that the tourism industry itself has taken the lead at European level in establishing quality (not sustainability) schemes in certain sectors that are then being applied in different countries. Therefore, it is recommended that the EU should not duplicate or compete with this through their own scheme, but indeed should consider supporting this, or other similar, industry-led initiatives.

EU actions should include:

- the identification and exchange of best practices in the use of user-generated ratings and their reflection in quality labels and initiatives;

- the support for industry in further identification and coordination of quality standards for specific sub-sectors of tourism between Member States, such as the Hotelstars Union scheme.

4. Establish a promotional platform and a programme of on-going networking and support for sustainability and quality certification schemes and labels.

This should build on the working group and other actions identified above. Possible actions should include:

- the development of an annual programme of publicity and awareness-raising for quality and sustainability schemes and labels, including B2C, B2B and B2G communication,

- the facilitation of networking between schemes, mutual learning and exchange of best practices,

- the provision of advice and support to Member States and regions, especially where sustainability and quality schemes are less active,

- the establishment of a system for monitoring and recording the performance and impact of schemes across the EU, including sustainability and quality outcomes,

- the provision of financial resources (or links to funding schemes) for relevant initiatives.

5. Promote local destination-level initiatives

Within the above context, initiatives should be encouraged and supported at a local destination level, including:

- the sustainability certification of local tourism destinations;

- the local promotion and coordination of business certification within destinations;

- the local delivery of advice and support to businesses on quality and sustainability;

- the establishment of links with existing initiatives, notably the European Tourism Indicators System (ETIS) for sustainable destinations.

6. Require contracting of certified tourism businesses in EU procurement and project funding

Requiring the EU institutions and the projects that they support to only contract with certified businesses would be a very practical demonstration of commitment and a powerful incentive for participation in certification, as well as a way of raising awareness of quality and sustainability issues and recognition of existing labels.

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ANNEX 1: STAKEHOLDERS INVITED TO PARTICIPATE IN THE FIRST ROUND OF THE SURVEY

Name	Country	Type of organisation	Website
5 Senses	Malta	Sustainable Tourism Association	5-sensesmalta.com
ABTTA - Association of Bulgarian Tour Operators and Travel Agents	Bulgaria	Travel Agency Association	abtta.com
Asociace českých cestovních kanceláří a agentur The Association of Tour Operators and Travel Agents of the Czech Republic	The Czech Republic	Travel Agency Association	accka.cz
ACTA - Association of Cyprus Travel Agents	Cyprus	Travel Agency Association	acta.org.cy
Administrația Lacuri, Parcuri și Agrement București Administration of Lakes, Parks and Leisure in Bucharest	Romania	Governmental Ministry	alpab.ro
ADRIMAG - Associação de Desenvolvimento Rural Integrado das Serras do Montemuro, Arada e Gralheira Integrated Rural Development Association of the Montemuro, Arada and Gralheira Mountains	Portugal	Environmental NGO	adrimag.com.pt
Agence Francais pour la Biodiversite French Agency for Biodiversity	France	Governmental Ministry	afbiodiversite.fr
AITR - Associazione Italiana Turismo Responsabile Italian Association for Responsible Tourism	Italy	Sustainability NGO	aitr.org
Österreichische Bundesarbeitskammer Federal Chamber of Labour	Austria	Trade Union	akeuropa.eu
LVOA - Lietuvos Vartotojų Organizacijų Aljansas Alliance of Lithuanian Consumer Organisations	Lithuania	Consumer Association	lvoa.lt

Agence Attractivité Alsace Alsace Tourism Agency	France	Regional Tourism Organisation	alsace.com
ALTA – Latvijas Tūrisma Aģentu un Operatoru Asociācija Association of Latvian Travel Agents and Operators	Latvia	Travel Agency Association	alta.net.lv
Munţii Ţarcu Altitude Association	Romania	Environmental NGO	tarcu.ro
Altroconsumo	Italy	Consumer Association	altroconsumo.it
ANAT - Asociatia Nationala A Agentiilor De Turism Romanian National Association of Travel Agents	Romania	Travel Agency Association	anat.ro
ANVR - Algemene Nederlandse Vereniging van Reisbureaus Dutch Association of Travel Agents and Tour Operators	The Netherlands	Travel Agency Association	anvr.nl
APC Romania - Asociaţia Pro Consumatori Romanian Association for Consumers' Protection	Romania	Consumer Organisation	apc-romania.ro
Arnika	The Czech Republic	Environmental NGO	arnika.org
ACAVe - Asociación Catalana de agencias de Viajes Especializadas Catalan Association of Specialised Travel Agencies	Spain	Travel Agency Association	acave.travel
ABTA - Association of British Travel Agents	UK	Travel Agency Association	abta.com
LVRA - Latvijas Viesnīcu un restorānu asociācija Association of Latvian Hotels and Restaurants	Latvia	Trade Association	lvra.lv
SKP - Stowarzyszenie Konsumentow Polskich Association of Polish Consumers	Poland	Consumer Organisation	konsumenci.org
ZSS - Združenie slovenských spotrebiteľov Association of Slovak Consumers	Slovakia	Consumer Organisation	zss.sk
HORESTA Association of the Hotel, Restaurant and Tourism Industry in Denmark	Denmark	Trade Association	horesta.dk

Atout-France France	France	National Tourism Organisation	france.fr
Donau Oberösterreich Danube Upper Austria area	Austria	Regional Tourism Organisation	donauregion.at
Österreich Austria	Austria	National Tourism Organisation	Austria.info
Baltijas Vides Forums Baltic Environmental Forum	Latvia, Lithuania and Estonia)	Environmental NGO	www.befgroup.net
O Bratislave Visit Bratislava	Slovakia	Destination Tourism Organisation	visitbratislava.com
British Destinations	UK	Trade Organisation	britishdestinations.co.uk
British Guild of Tourist Guides	UK	Professional Association	britainsbestguides.org
British Hospitality Association (BHA)	UK	Trade Association	bha.org.uk
British Institute of Innkeeping	UK	Professional Association	bii.org
Budapest útikalauz Budapest Travel Guide	Hungary	Destination Tourism Organisation	Budapest.com
BHRA - Bulgarian Hotel and Restaurant Association	Bulgaria	Trade Association	bhra-bg.org
BNAAC - Bulgarian national association active consumers	Bulgaria	Consumer Association	aktivnipotrebiteli.bg
Bundesverband der Deutschen Tourismuswirtschaft Federal Association of the German Tourism Industry	Germany	National Tourism Association	btw.de
Levegö Munkacsop CAAG –Clean AIR Action Group	Hungary	Environmental NGO	levego.eu
Agència Catalana de Turisme Catalan Tourist Board	Spain	Regional Tourism Organisation	acr.gencat.cat

CEPTA - centrum pre trvalo-udržateľné alternatívy Centre for Sustainable Alternatives	Slovakia	Sustainability NGO	cepta.sk
IGHP - Izba Gospodarcza Hotelarstwa Polskiego Chamber of Commerce of the Polish Hotel Industry	Poland	Trade Association	ighp.pl
City of Athens Conventions and Visitors Bureau	Greece	Destination Tourism Organisation	athenscvb.gr
CLCV - Association nationale de défense des consommateurs et usagers National Consumer and Consumer Association	France	Consumer Association	clcv.org
Coastal & Marine Union EUCC	The Netherlands	Sustainability NGO	eucc.net
CEHAT - Confederación Española de Hoteles y Alojamientos Turísticos Spanish Confederation of Hotels and Tourist Accommodation	Spain	Trade Association	cehat.com
ConfTurismo	Italy	Travel Agency Association	confturismo.it
Consumentenbond Consumer Union	The Netherlands	Consumer Association	consumentenbond.nl
Consumers Association Malta	Malta	Consumer Association	camalta.org.mt
Kuluttajaliitto-Konsumentförbundet Ry Consumers' Union of Finland	Finland	Consumer Association	kuluttajaliitto.fi
Cyprus Center for Environmental Research and Education	Cyprus	Environmental NGO	http://kykpee.org
Cyprus Consumers' Association	Cyprus	Consumer Association	cyprusconsumers.org.cy
Cyprus Hotels Association	Cyprus	Trade Association	cyprushotelassociation.org
Czech Tourism	The Czech Republic	National Tourism Organisation	czechtourism.com
Forbrugerrådet Tænk Danish Consumer Council	Denmark	Consumer Association	taenk.dk

Miljø- og Fødevareministeriets - Naturstyrelsen Danish Nature Agency	Denmark	Governmental Ministry	naturstyrelsen.dk
Društvo Temno nebo Slovenije Dark-Sky Slovenia	Slovenia	Environmental NGO	temnonebo.com
Deco Proteste	Portugal	Consumer Association	deco.proteste.pt
DEHOGA Bundesverband German Hotel and Catering Association	Germany	Trade Association	dehoga-bundesverband.de
Destination Killarney	Ireland	Destination Tourism Organisation	destinationkillarney.ie
Deutscher ReiseVerband German Travel Association	Germany	Travel Agency Association	drv.de
Deutsches Reisemanagement German Business Travel Association	Germany	Travel Agency Association	vdr-service.de
Die Verbraucher Consumer Initiative	Germany	Consumer Association	verbraucher.org
Diesis	Belgium	Social NGO	diesis.coop
Ministère de l'Economie - Direction générale du tourisme Directorate-General for Tourism	Luxembourg	Governmental Ministry	gouvernement.lu
dTest	The Czech Republic	Social NGO	dtest.cz
Vereniging Nederlands Cultuurlandschap Dutch Cultural Heritage Association (VNC)	The Netherlands	Sustainability NGO	nederlandscultuurlandschap.nl
Nationale Paarken Dutch National Parks	The Netherlands	Governmental Ministry	nationaalpark.nl
EcoCity	Greece	Environmental NGO	ecocity.gr
EcoTourism Ireland	Ireland	Sustainable Tourism Association	ecotourismireland.ie
EcoTours Portugal	Portugal	Sustainable Tourism Association	tarbijakaitse.ee

EMLA - Környezeti Management és Jog Egyesület Environmental Management and Law Association	Hungary	Environmental NGO	emla.hu
ELKS - Eesti Looduskaitse Selts Estonian Nature Conservation Society	Estonia	Environmental NGO	elks.ee
Espana Spain	Spain	National Tourism Organisation	spain.info
Eesti Tarbijakaitse Liit Estonian Consumers Union	Estonia	Consumer Association	tarbijakaitse.ee
Eesti Hotellide Ja Restoranide Liit Estonian Hotel and Restaurant Association	Estonia	Trade Association	ehrl.ee
ETFL - Eesti Turismifirmade Liit Estonian Travel and Tourism Association	Estonia	Travel Agency Association	etfl.ee
Europe and We	Bulgaria	Environmental NGO	europeandwe.eu
Fachverband Gastronomie Association of Gastronomy	Austria	Trade Association	gastronomieverband.at
Fachverband Hotellerie Association of Hotel Industry	Austria	Trade Association	hotelverband.at
FATTA (Federation of Associations of Travel & Tourism Agents Malta)	Malta	Travel Agency Association	fatta.org
FEHR - Federación Española de Hosteleria Spanish Federation of Hotels	Spain	Trade Association	fehr.es
Federalberghi	Italy	Trade Association	federalberghi.it
FIPE - Federazione Italiana Pubblici Esercizi Italian Association for Leisure	Italy	Trade Association	fipe.it
Federturismo	Italy	Travel Agency Association	federturismo.it
FEEO - Federation of Environmental and Ecological Organisations of Cyprus	Cyprus		oikologiafeeo.org

FEOSZ - Fogyasztóvédelmi Egyesületek Országos Szövetsége National Association of Consumer Protection Associations	Hungary	Consumer Association	feosz.hu
Suomen luonnonsuojeluliitto Finnish Association for Nature Conservation	Finland	Environmental NGO	sll.fi
Matkailu-ja Ravintolapalvelut MaRa Finnish Hospitality Association	Finland	Trade Association	mara.fi
FIT/ FTI - Federatie van de Toeristische Industrie Federation of Tourism Industry	Belgium	Travel Agency Organisation	fit-fti.be
Forum Anders Reisen	Germany	Sustainable Tourism Association	forumandersreisen.de
France Nature Envionnement	France	Environmental NGO	fne.asso.fr
Friends of the Earth	10 EU countries	Environmental NGOs	foei.org
Gaia Trust	Denmark	Environmental NGOs	gaia.org
General Workers' Union	Malta	Trade Union	gwu.org.mt
GNI Synhorcat	France	Trade Association	synhorcat.com
Deutsche Zentrale für Tourismus German National Tourism Board	Germany	National Tourism Organisation	germany.travel
Go to Hungary	Hungary	National Tourism Organisation	gotohungary.com
Zelený Kruh Green Circle	The Czech Republic	Environmental NGO	zelenykruh.cz
Hand Picked Greece	Greece	Sustainable Tourism Association	handpickedgreece.com
HATTA - Hellenic Association of Travel and Tourist Agencies	Greece	Travel Agency Association	gtp.gr/hatta
Hellenic Chamber of Hotels	Greece	Trade Association	grhotels.gr

Heritage Parks Federation	Malta	Environmental NGO	maltacvs.org/voluntary/the-heritage-parks-federation
Holland	The Netherlands	National Tourism Organisation	holland.com
HoReCa Vlaanderen	Belgium	Trade Association	horecavlaanderen.be
Hotel and Catering International Management Association (HCIMA)	UK	Trade Association	instituteofhospitality.org
Magyar Szállodák és éttermek Szövetsége Hungarian Hotel and Restaurant Association	Hungary	Trade Association	hah.hu
Erzsébet Program Hungarian National Foundation for Recreation (HNFR)	Hungary	Social NGO	erzsebetprogram.eu
Incoming Romania	Romania	National Tourism Organisation	incomingromania.org
Korporatīvās ilgtspējas un atbildības institūts Institute for Corporate Sustainability and Responsibility	Latvia	Sustainability NGO	incsr.eu/lv
Instituut voor Natuureducatie en Duurzaamheid Institute for Natural Education and Sustainability	The Netherlands	Environmental NGO	ivn.nl
ISD - Institute for Sustainable Development	Slovenia	Sustainability NGO	itr.si
Irish Hotels Federation	Ireland	Trade Association	ihf.ie
Irish Travel Agents Association	Ireland	Travel Agency Association	itaa.ie
Italian National Tourism	Italy	National Tourism Organisation	enit.it
Koninklijk HoResCA	The Netherlands	Trade Association	khn.nl
Konsument	Austria	Social NGO	konsument.at
HoResCa	Luxembourg	Trade Association	horesca.lu

Latvijas Kempingu asociācija Latvian Camping Association	Latvia	Sustainable Tourism Association	camping.lv
Latvijas Patērētāju interešu aizstāvības asociācija Latvian Consumer Interests Association	Latvia	Consumer Association	pateretajs.lv
Les Enterprises du Voyage Travel Businesses	France	Travel Agency Association	enterprisesduvoyage.org
Lisbon Sustainable Tourism	Portugal	Sustainable Tourism Association	lisbonsustainabletourism.com
Lithuania Travel	Lithuania	National Tourism Organisation	lithuania.travel
Lietuvos viešbučių ir restoranų asociacija Lithuanian Hotel and Restaurant Association	Lithuania	Trade Association	lvra.lt
Ljubljana and Central Slovenia	Slovenia	Regional Tourism Organisation	visitljubljana.com
Malta Hotels and Restaurants Association	Malta	Trade Association	mhra.org.mt
Federparchi Italian Federation of Parks and Nature Reserves	Italy	Environmental NGO	enteparchi.bo.it
Marina Matters	Spain	Professional Association	siches.com
Mediterranean SOS Network	Greece	Environmental NGO	medsos.gr
Metsähallitus Parks and Wildlife Finland	Finland	Governmental Ministry	metsa.fi
Ministero dei Beni e delle Attività Culturali e del Turismo Ministry for Cultural Heritage and Activities and for Tourism	Italy	Governmental Ministry	beniculturali.it
Földművelésügyi Minisztérium Ministry of Agriculture	Hungary	Governmental Ministry	kormany.hu/en/ministry-of-agriculture
Republika Slovenija Ministrstvo Za Gospodarski Razvoj In Tehnologijo Ministry of Economic Development and Technology	Slovenia	Governmental Ministry	mgrt.gov.si/

Ministry of Energy, Commerce, Industry and Tourism	Cyprus	Governmental Ministry	mcit.gov.cy
Keskkonnaministeerium Ministry of Environment, Environment Department	Estonia	Governmental Ministry	keskkonnaamet.ee
Ministry of Tourism	Malta	Governmental Ministry	tourism.gov.mt
Ministry of Tourism	Bulgaria	Governmental Ministry	tourism.government.bg
Ministerstvo Dopravy A Výstavby Slovenskej Republiky Ministry of Transport and Construction of the Slovak Republic	Slovakia	Governmental Ministry	slovakia.org
Österreichische Umweltzeichen Austrian Eco-label (Ministry of Environment)	Austria	Governmental Ministry	umweltzeichen.at
MŰISZ Iskolaszövetkezet Association of Hungarian Travel Agencies	Hungary	Travel Agency Association	Muisz.hu
NABU - Nature and Biodiversity Conservation Union	Germany	Environmental NGO	nabu.de
Nationaal Landschap Groene Hart National Landscape Green Heart	The Netherlands	Environmental NGO	stuurgroepgroenehart.nl
National Parks and Wildlife Service	Ireland	Government Ministry	npws.ie
Dabas Aizsardzības Pārvalde Nature Conservation Agency	Latvia	Governmental Ministry	daba.gov.lv
Agentura Ochrany Přírody a Krajiny Nature Conservation Agency of the Czech Republic	The Czech Republic	Governmental Ministry	ochranaprirody.cz
Nature Trust Malta	Malta	Environmental NGO	naturetrustmalta.org
NEC Notranjska ekološki center, Cerknica NEC Notranjska ecological centre, Cerknica	Slovenia	Environmental NGO	nec-cerknica.si
North Jutland	Denmark	Regional Tourism Organisation	visitnordjylland.com/ln-int/north_jutland

NTVA - Nacionalinė Turizmo Verslo Asociacija National Tourism Business Association	Lithuania	Travel Agency Association	ntva.lt
Official Tourism Portal of Bulgaria	Bulgaria	National Tourism Organisation	bulgariatravel.org
OGBL - Onofhängege Gewerkschafts Bond Lëtzebuerg Independent Trade Union of Luxembourg	Luxembourg	Trade Union	ogbl.lu
Österreichischer Reisebüroverband Austrian Travel Association	Austria	Travel Agency Association	Oerv.at
Friluftsrådet Outdoors Council	Denmark	Environmental NGO	friluftsraadet.dk
Way2Lithuania	Lithuania	National Travel Association	way2lithuania.com
PIT - Polska Izba Turystyki Polish Chamber of Tourism	Poland	Travel Agency Association	pit.org.pl
Federacja Konsumentow Polish Consumer Federation	Poland	Consumer Association	federacja-konsumentow.org
Polski Klub Ecologiczny Polish Ecological Club (Friends of the Earth)	Poland	Environmental NGO	pke-zg.home.pl
BTO – Buy Tourism Online	Italy	Travel Agency Association	buytourismonline.com
Polska Polish Tourist Organisation	Poland	National Tourism Organisation	poland.travel
Pomorskie Tourist Board	Poland	Regional Tourism Organisation	pomorskie.travel
Prague.eu	The Czech Republic	Destination Tourism Organisation	prague.eu
ProPark	Romania	Environmental NGO	propark.ro
Region Zealand	Denmark	Regional Tourism Organisation	regionsjaelland.dk
Restaurants Association of Ireland	Ireland	Trade Association	rai.ie

Rīgas Tūrisma attīstības biroja fonds Riga Tourism Development Bureau Foundation	Latvia	Destination Tourism Organisation	liveriga.com
Romania Tourism	Romania	National Tourism Organisation	romaniatourism.com
Romanian Association for Accommodation and Ecological Tourism - "Bed and Breakfast"	Romania	Trade Association	
SACKA - Slovenská Asociácia Cestovných Kancelárií A Cestovných Agentúr Slovak Association Of Tour Operators And Travel Agents	Slovakia	Travel Agency Association	sacka.eu
Salzburg Tourism Office	Austria	Destination Tourism Organisation	salzburg.info
Zveza potrošnikov Slovenije Slovene Consumers' Association	Slovenia	Consumer Association	zps.si
Slovenian Tourism Board	Slovenia	National Tourism Organisation	slovenia.info
Společnost pro trvale udržitelný život Society for Sustainable Life	The Czech Republic	Environmental NGO	stuz.cz
Society for the Environment and Cultural Heritage	Greece	Sustainability NGO	en.ellet.gr
Naturparks in Südtirol South Tyrol National Parks	Italy	Environmental NGO	naturparks.provinz.bz.it
Staatsbosbeheer State Forestry	The Netherlands	Environmental NGO	staatsbosbeheer.nl
Sustainia	Denmark	Environmental NGO	sustainia.me
Svenska byrån för ekonomisk och regional tillväxt Swedish Agency for Economic and Regional Growth	Sweden	Governmental Ministry	government.se
Nature's Best	Sweden	Sustainable Tourism Association	naturesbestsweden.com

Svenska byrån för ekonomisk och regional tillväxt Swedish Society for Nature Conservation	Sweden	Environmental NGO	naturskyddsforeningen.se
Swedish Tourist Association	Sweden	National Tourism Organisation	swedishtouristassociation.com
Test-Achats	Belgium	Consumer Association	test-achats.be
Danmarks Rejsebureau Forening Danish Travel Agency Association	Denmark	Travel Agency Association	travelassoc.dk
Suomen matkatoimistoalan liitto ry Finnish Association of Travel Agents	Finland	Travel Agency Association	smal.fi
AHR - asociace hotelů a restaurací české republiky Czech Association of Hotels and Restaurants	The Czech Republic	Trade Association	ahrcr.cz
Natur och Miljö The Finnish Society for Nature and Environment	Finland	Environmental NGO	naturochmiljo.fi
The Hague Travel Trade	The Netherlands	Destination Tourism Organisation	thehaguetraveltrade.com
The Heritage Council	Ireland	Government Ministry	heritagecouncil.ie
Il Sistema Parchi dell'Oltrepò Mantovano Parks System Oltrepò Mantovano	Italy	Environmental NGO	sipom.eu/il-sistema-parchi/
Zväz hotelov a reštaurácií SR Slovak Association of Hotels and Restaurants	Slovakia	Trade Association	zhrsr.sk
Sveriges Konsumenter Swedish Consumers' Association	Sweden	Consumer Association	sverigeskonsumenter.se
Touring Club Italiano	Italy	National Tourism Organisation	touringclub.it
Turistično gostinska zbornica Slovenije Tourism and Hospitality Chamber of Slovenia	Slovenia	Trade Association	tgzs.si

Kronplatz – Plan de Corones Tourism Board	Italy	Regional Tourism Organisation	kronplatz.com
Tourism Board of Folgaria Lavarone and Luserna	Italy	Regional Tourism Organisation	alpecimbra.it
Tourism Management Institute (Destinations)	UK	Trade Association	tmi.org.uk
Tourism Watch	Germany	Sustainable Tourism Association	tourism-watch.de
Union des Métiers et des Industries de l'Hôtellerie Trade Union of the Hotel Industry	France	Trade Union	umih.fr
Unioncamere Chamber of Commerce of Italy	Italy	Travel Agency Association	unioncamere.gov.it
Unione Nazionale Consumatori National Union of Consumers	Italy	Consumer Association	consumatori.it/turismo-trasporti
Utrecht - the Heart of Holland	The Netherlands	Destination Tourism Organisation	theheartofholland.com
Vedvarende Energi Sustainable Energy	Denmark	Environmental NGO	ve.dk
Verbraucherzentrale Federal Consumer Association	Germany	Consumer Association	vzbv.de
Verkehrsclub Deutschland Traffic Club Germany	Germany	Sustainable Tourism Organisation	vcd.org
Visit Antwerp	Belgium	Destination Tourism Organisation	visitantwerpen.be
Visit Britain	UK	National Tourism Organisation	visitbritain.org
Visit Bruges	Belgium	Destination Tourism Organisation	visitbruges.be
Visit Cyprus	Cyprus	National Tourism Organisation	visitcyprus.com
Visit Denmark	Denmark	National Tourism Organisation	visitdenmark.com

Visit Estonia	Estonia	National Tourism Organisation	puhkaeestis.ee
Visit Finland	Finland	National Tourism Organisation	visitfinland.com
Visit Flanders	Belgium	Regional Tourism Organisation	visitflanders.com
Visit Greece	Greece	National Tourism Organisation	visitgreece.gr
Visit Helsinki	Finland	Destination Tourism Organisation	visithelsinki.fi
Visit Luxembourg	Luxembourg	National Tourism Organisation	visitluxembourg.com
Visit Malta	Malta	National Tourism Organisation	visitmalta.com
Visit Portugal	Portugal	National Tourism Organisation	visitportugal.com
Visit Scotland	UK	Regional Tourism Organisation	visitscotlandtraveltrade.com
Visit Stockholm	Sweden	Destination Tourism Organisation	visitstockholm.com
Visit Tallinn	Estonia	Destination Tourism Organisation	visittallinn.ee
Visit Varna	Bulgaria	Destination Tourism Organisation	visit.varna.bg
Visit Wallonia	Belgium	Regional Tourism Organisation	walloniebelgiquetourisme.be
Visita Swedish Hospitality Industry	Sweden	Trade Association	visita.se
Visit Flanders	Belgium	Regional Tourism Organisation	visitflanders.com

WWF Germany	Germany	Environmental NGO	wwf.de
ZTAS - Zdruzenje turisticnih agencij Slovenije Association of Tourist Agencies of Slovenia	Slovenia	Travel Agency Association	ztas.org/

ANNEX 2: TOURISM LABELLING ORGANISATIONS INVITED TO PARTICIPATE IN THE SECOND SURVEY

Name
GLOBAL
Biosphere Responsible Tourism
Green Key Eco Rating Program
Green Growth 2050 - Travel Beyond
Eco Hotels Certified
European Ecolabel for Tourist Accommodation Services and Campsite Services
TripAdvisor Green Leaders Program
ECORISMO
Green Pearls Unique Places
DGNB Certification
Eco-Hotel Certification TÜV Rheinland
EcoResort Quality Seal
Naturland
TourCert
GSTC Standards
International Organization for Standardization ISO
Slow Food
Green Destinations Certification
Travelife
QualityCoast Award
GT Active
Green Tourism
HI Quality & Sustainability Certification
Sustainable Restaurant Rating
Ecotel (New Delhi Services)
Green Globe
Blue Flag, Global
EarthCheck

Green Key

Travelife (Accommodations)

PLANET 21 program

The UNESCO MAB Programme

Cittaslow

LT&C - Linking Tourism & Conservation

Q certification Tourism

myclimate

Audubon International

Global Ecosphere Retreats® (GER)

EUROPEAN

BioHotels

European Wilderness Quality Standard

Alpine Pearls

Certified Green Hotel

Green Brands

Umweltgütesiegel auf Alpenvereinshütten

ECOCAMPING

Nordic Swan

Blaue Schwalbe, Europe

EMAS (Eco-Management and Audit Scheme)

European Ecotourism Labelling Standard (EETLS)

ECEAT Quality Label

Certified Green Hotel

ECO XXI

Breeam

European Charter for Sustainable Tourism in Protected Areas

European Hospitality Quality

Hotelstars Union

Baltic Country Holidays – Butterfly quality scheme

NATIONAL	
Austria Bio Garantie GMBH	Austria
Austrian Ecolabel for Tourism	Austria
Bergsteigerdörfer	Austria
Swiss Tourism Quality ProgramWellness Destination, Family Destination etc.	Switzerland
Fbex Fairstay	Switzerland and Liechtenstein
Croatian Q award	Croatia
Quality Label for Hotels, Croatia	Croatia
Small and family-run 'ECO Hotels	Croatia
Cyprus Tourism Quality (CTQ)	Cyprus
Czech Specials	The Czech Republic
Czech Service Quality System	The Czech Republic
Certifikace - Turistická informační centra	The Czech Republic
Cyklisté vítání	The Czech Republic
Czech service quality system	The Czech Republic
Czech specials	The Czech Republic
Dovolená na statku	The Czech Republic
Dovolená na venkově	The Czech Republic
Ekologicky šetrná služba	The Czech Republic
Regionální značka	The Czech Republic
Ubytování v soukromí	The Czech Republic
Zážitky na venkově	The Czech Republic
Wassertourismus Germany	Germany
ServiceQuality Germany	Germany
Bio-Siegel	Germany
Bioland	Germany
Ecovin	Germany
Fairpflichtet	Germany
Golf und Natur	Germany
Reise für Allen	Germany

GreenSign - InfraCert GmbH	Germany
Partner der Nationalen Naturlandschaften	Germany
DEHOGA Umweltcheck	Germany
Wanderbares Deutschland Qualitätszeichen	Germany
VIABONO	Germany
Qualitäts- und Umweltsiegel für den Kanutourismus, Germany	Germany
The Sustainability Code / Der Deutsche Nachhaltigkeitskodex	Germany
Der Blaue Angel	Germany
Deutsches Institut für Nachhaltigkeit und Ökonomie	Germany
Quality Matters - Qualitätsoffensive Naturparke	Germany
Accessibility Label Scheme	Denmark
Calidad Touristica	Spain
Estonian Tourism Quality Program	Estonia
Estonian Ecotourism Quality Label	Estonia
Laatutonni Quality 1000	Finland
L'Offre Premium	France
France PRL	France
ANETT – e.g. Family Plus, La Station Classee	France
Qualité Tourisme	France
Chouette Nature	France
écogîte	France
Gites Panda	France
HQE (Association)	France
Tourisme et Handicaps	France
Act for Responsible Tourism,	France
Q Certification H&R	Greece
Green Choice by Envcml	Greece
Hungarian Tourism Quality Award	Hungary
National Quality Assurance Framework	Ireland
Green Hospitality Award	Ireland
Ecotourism Label	Ireland

Bandiere Arancioni	Italy
Legambiente Turismo	Italy
EureWelcome	Luxembourg
EcoLabel Luxembourg	Luxembourg
Couvert	Luxembourg
Latvian Q label	Latvia
Green Certificate, Latvia	Latvia
Quality Assured for DMCs	Malta
ECO Certification, Malta	Malta
Eco-Lighthouse	Norway
Ecotourism Norway	Norway
Clean Tourism Certificate	Poland
Clean Tourism Certificate	Poland
Eco-Romania	Romania
Scandinavian Service and Quality Award	Sweden
Nature's Best	Sweden
Slovak Service Quality System in Tourism	Slovakia
VisitEngland – e.g. Visitor Attraction Quality Scheme	The United Kingdom
AA Assessment	The United Kingdom
David Bellamy Conservation Award	The United Kingdom
Green Leaf Business Scheme	The United Kingdom
Green Dragon Environmental Standard	The United Kingdom
Green Flag Award	The United Kingdom
Regional	
Brusselicious	Belgium
Wallonia Quality Destination	Belgium
Label de qualité 'Soleil' (Wallonia)	Belgium
Entreprise Ecodynamique Bruxelles	Belgium
Gîtes Panda, Belgium	Belgium
Partner Biosphärengebiet Schwäbische Alb	Germany
Partner des Biosphärenreservates Bliesgau	Germany

Partner Nationalpark Wattenmeer- Niedersachsen	Germany
Biosphärengastgeber	Germany
Naturparkhotels Südschwarzwald	Germany
Partner Biosphärenreservat Flusslandschaft Elbe	Germany
Partner Biosphärenreservat Kartstlandschaft Südharz	Germany
Partner Biosphärenreservat Oberlausitzer Heide- und Teichlandschaft	Germany
Partner Biosphärenreservat Schalsee	Germany
Partner Biosphärenreservat Spreewald	Germany
Partner Biosphärenreservat Südost-Rügen	Germany
Partner Biosphärenreservat Vessertal-Thüringer Wald	Germany
Partner Müritz Nationalpark	Germany
Partner Nationalpark Bayerischer Wald	Germany
Partner Nationalpark Eifel	Germany
Partner Nationalpark Hainich	Germany
Partner Nationalpark Harz	Germany
Partner Nationalpark Jasmund	Germany
Partner Nationalpark Kellerwald-Edersee	Germany
Partner Nationalpark Sächsiche Schweiz	Germany
Partner Nationalpark Unteres Odertal	Germany
Partner Nationalpark Vorpommersche Boddenlandschaft	Germany
Partner Nationalpark Wattenmeer Schleswig-Holstein	Germany
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Partner Naturpark Uckermärkische Seen	Germany
Prüfzeichen Schorfheide-Chorin, Germany	Germany
Bayerisches Umweltgütesiegel für das Gastgewerbe	Germany
EIFEL - Qualität ist unsere Natur, Germany	Germany
Nachhaltiges Reiseziel Baden-Württemberg	Germany
Terres de l'Ebre Brand	Spain
Club de Producto Turístico Reservas de Biosfera Españolas – Reserva Mundial de la Biosfera La Palma	Spain
Eco-label "Donana 21", Spain	Spain

Emblem of Guarantee of Environmental Quality	Spain
Authentic B&B écoresponsable	France
Flocon Vert	France
Agritourism Quality Label	Greece
Ecoristorazione Trentino (IT)	Italy
Marchio di Qualità	Italy
Associação Casas Brancas	Portugal
Sapmi Experience	Sweden
Ljubljana/ Central Slovenia – Quakity Ljubljana	Slovenia
Peak District Environmental Quality Mark	The United Kingdom

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