

# **Green Key Global Survey**

**Green Key site managers**

## 1. About the survey

In 2015 Green Key conducted a survey amongst Green Key site managers to learn more about why they choose the Green Key label and their view on the programme. The survey was conducted in 9 languages in 29 countries from May to July. A total of 674 Green Key site managers participated in this survey (corresponding to around 30% of all Green Key sites). Green Key International forwarded the survey to the National Operators who were responsible for distributing it among the Green Key site managers in their countries. Green Key International distributed the survey amongst the sites managed directly by them, in countries with no National Operators. The survey was digitalized with the help of the online platform *SurveyMonkey*. All respondents filled out the form online.

The results of this survey give an insight in reasons why site managers choose the Green Key label, the impact it has on their business and also entails a small evaluation of the programme. It can be used to identify the strengths of the programme, to find the gaps between the values of the programme and Green Key managers' perception of them and to improve the promotion and development of the Green Key programme.

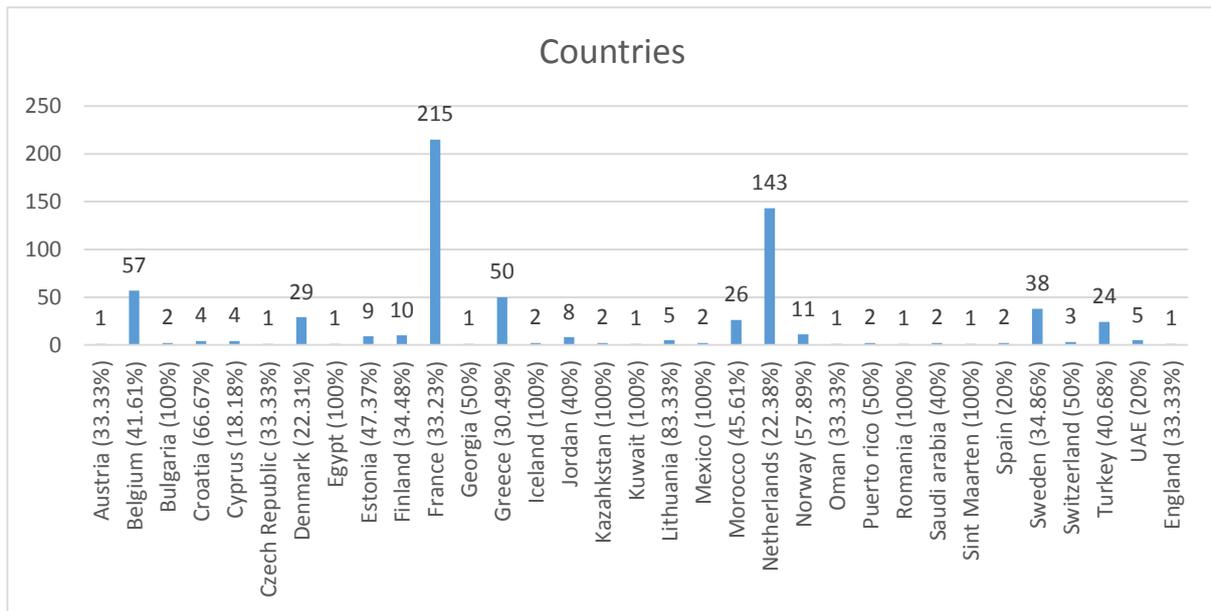
The survey was translated in 10 languages, however only 9 languages were used to conduct the survey as no Serbian Green Key site managers participated in the survey.

Language	Percentage of answers
French	38.3%
Dutch	27.3%
English	12.8%
Greek	8.0%
Swedish	5.7%
Danish	4.3%
Turkish	2.2%
Estonian	1.3%
Croatian	0.6%

## 2. General information about the Green Key sites

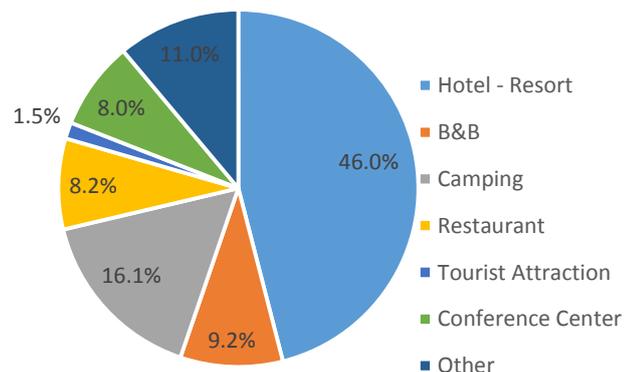
Before analysing the impact and evaluation of the Green Key label according to Green Key site managers, it is important to get a better picture of them.

Green Key sites from 29 countries participated in the survey. Almost a third (32.3%) of the responding sites are situated in France. The participating countries are shown in the graphic below. The percentage displayed next to the country is the proportion of respondents in the country related to the amount of Green Key sites in that country.

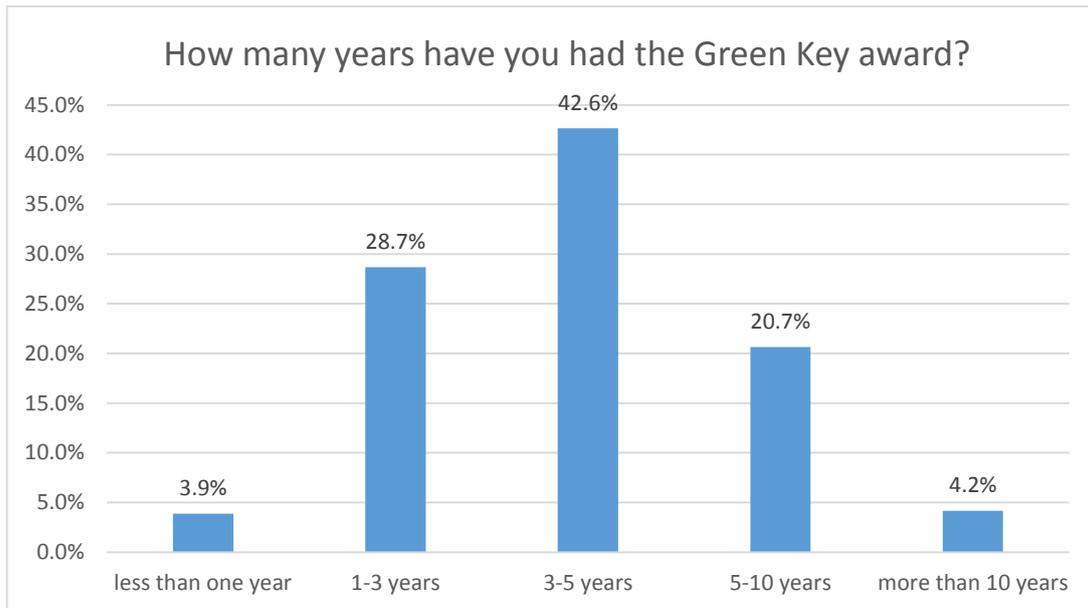


Almost half of the responding Green Key sites fall in the category Hotel-Resort. The second biggest category participating in the survey are campsites with 16%. Other categories are equally represented with a response rate around 10%, except for Tourist Attractions with only 12 respondents. These proportions are in line with the general distribution of the Green Key sites over the different categories.

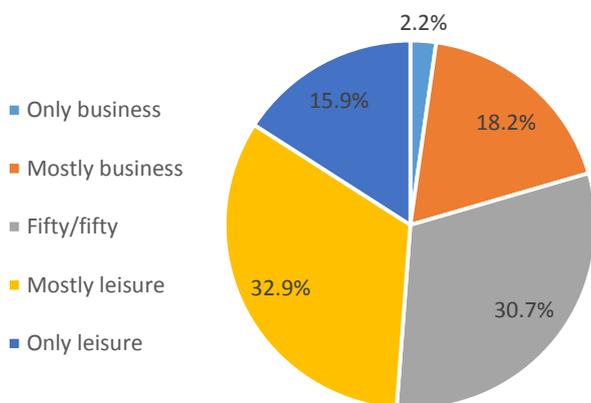
### Type of establishment



In this survey 67.5% of the Green Key sites have had the Green Key award for at least 3 years and are therefore well know with the label and were able to form substantiated answers to the questions. Only 3.9% have joined the Green Key scheme less than a year ago.



### Type of guests



In regard to the question what type of guests the Green Key Sites mostly have, about half (48.8%) states to accommodate mostly or only tourists and 30.7% has an equal amount of tourists and business guests coming to their establishment. Around 20% of the responding sites have mostly or only business guests.

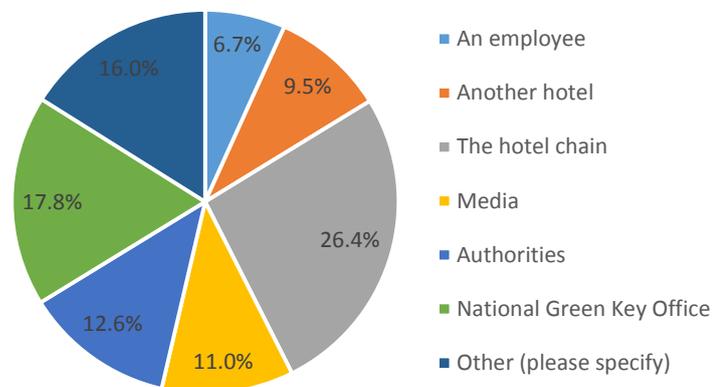
### 3. Information about joining the Green Key label

In this part of the survey, the aim was to find out how they joined the Green Key Scheme and what the reason was to do so. These facts will tell us more about which information channels are reaching our target group and what reasons eventually persuaded them to join. Very valuable information to develop the Green Key Marketing strategy.

Respondents had to choose how they learned about Green Key out of the following list of options. If chosen 'other' they were asked to specify.

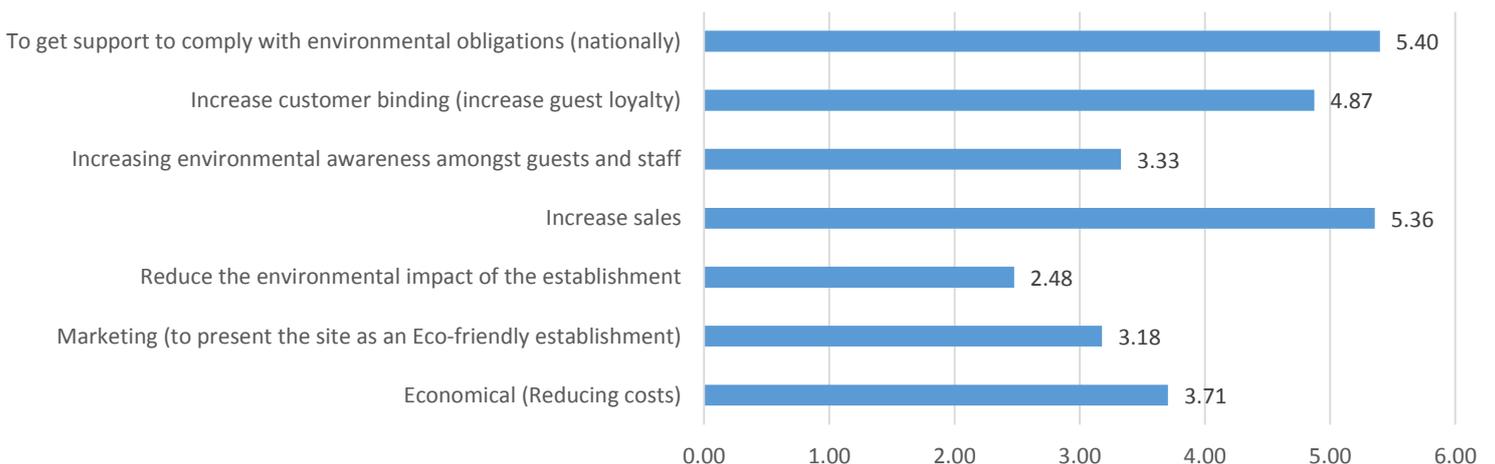
There seems to be a lot of different ways how Green Key site managers learned about the certification scheme. More than a fourth of the respondents learned about is through the hotel chain who made the commitment to have the Green Key in all of their establishments. About 18% of the respondents was informed by the national Green Key organisation. Authorities and media are also a significant source of information with respectively 12.6% and 11%. 16% of the respondents state they learned about through other sources of information. They mention, amongst others, own research, other environmental organisations and Tourism offices.

How did you learn about Green Key?



In relation to how they learned about Green Key, it is also interesting to know why they eventually decided to choose for the Green Key certification. Green Key site managers were asked to rank various reasons to join the Green Key Scheme. From 1 being the most important reason to join and 7 the least important reason.

What were the main reasons to join the Green key scheme? → Rank from 1-7. 1 being the most important reason to join the Green Key scheme and 7 the least important reason.



The reason that was ranked highest is 'to comply with environmental obligations' which are set out by law. It seems more and more businesses feel the pressure from governments to comply with certain environmental legislation and therefore join an ecolabel to help them to comply with these obligations.

The potential for economic benefit for the Green Key site managers is a second important determinant for certifying the site with the Green Key award. They expect an increase of sales as a result of acquiring an eco-label as they seem to experience more and more customers looking for environmentally responsible businesses. Related to this is an increase in customer binding. Green Key site managers expect to have more regular guests because of the environmental efforts the establishment makes. Another economical reason, with a medium rating score, is reducing operational costs. As tourism businesses spend a large amount on water, energy and waste disposal, they expect the adopting of an eco-certification will reduce those costs.

The increase in environmental awareness amongst guests and staff was rated as the fifth most important reason to join the Green Key label, followed by marketing reasons.

Reducing the environmental impact of the establishment was ranked as least important.

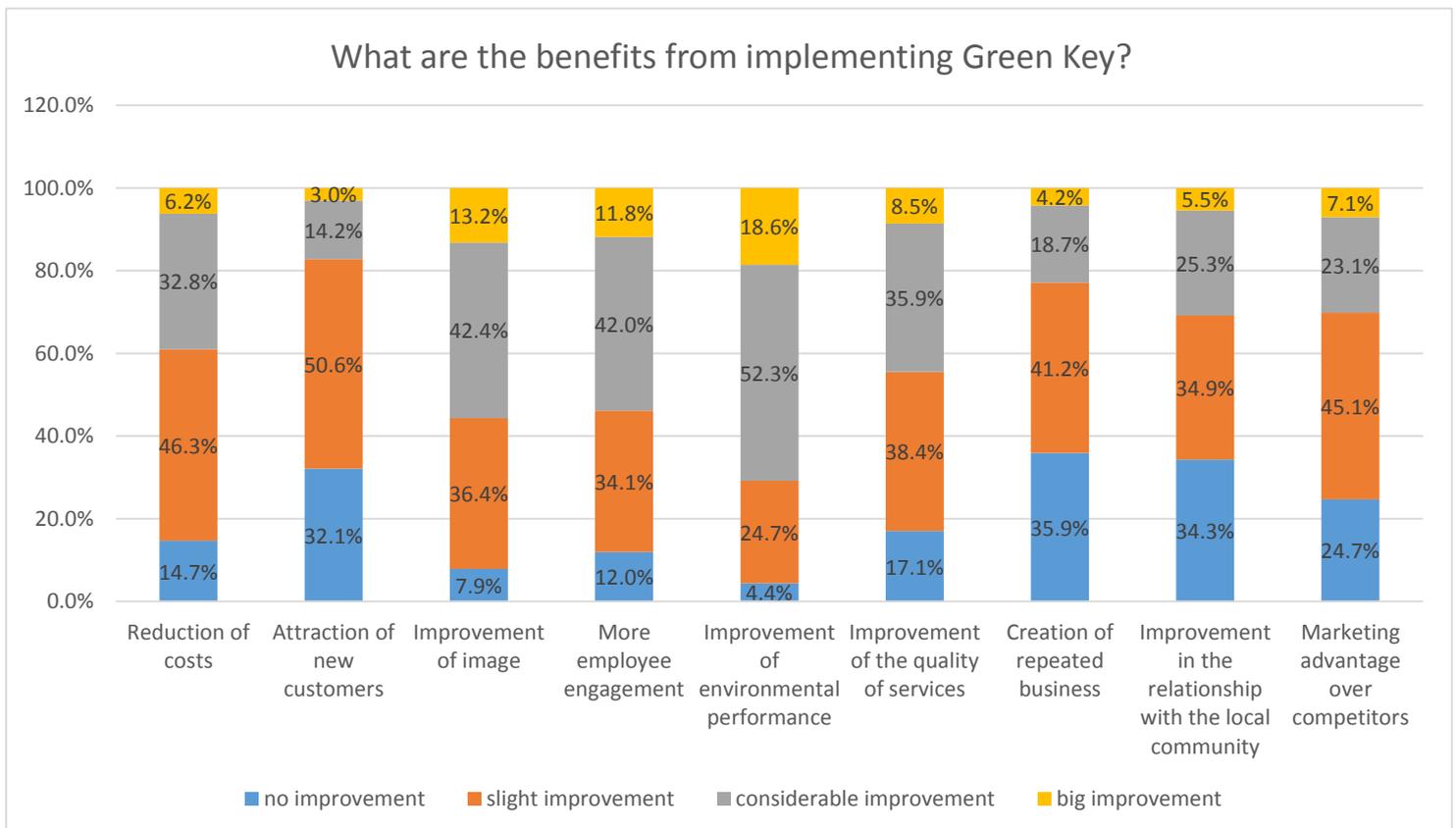
In general it seems site managers choose for the Green Key label mostly because they want to get something out of it or because they 'have to'. Education guests and staff about sustainability and actually reducing their environmental impact are subsequent.

## 4. The impact of the Green Key label

### 4.1 Benefits from implementing Green Key

Measuring the impact of the Green Key label not only shows us the strong points of the label, which can be used in the marketing of the programme, but also what we can do better. As an environmental educational programme (part of the Foundation for Environmental Education) the ultimate objectives of the Green Key ecolabel are to improve the environmental performance of individual establishments and raise awareness and create behavioural change amongst staff, guests and suppliers of establishments. However, as the main objective of most of the tourism establishments is making profit, we also measured other possible benefits, which can later be used in the marketing strategy.

The Green Key site managers were asked what they feel has improved or has not improved since they joined the Green Key scheme. Rating following possible benefits from no improvement to big improvement.



Improvement of environmental performance is rated as the biggest benefit from joining the Green Key scheme with 52.3% of the respondents seeing a considerable improvement and 18.6% a big improvement in that area.

Second and third main benefits are the improvement of the image of the establishment and more employee engagement with respectively 42.4% and 42% seeing a considerable improvement and 13.2% and 11.8% experiencing a big improvement in those areas.

32.8% of the respondents state there is a considerable reduction in costs and 6.2% says the savings are big. Almost 45% of the Green Key site managers sees an improvement (considerable or big) when it comes to the quality of their services.

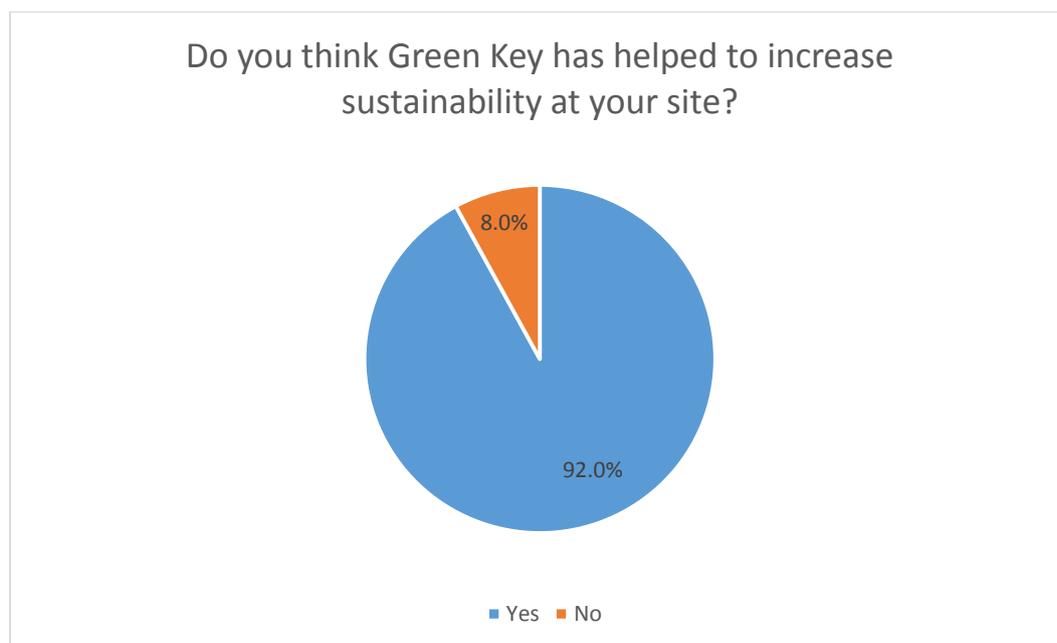
Less substantial benefits of implementing the Green Key programme, in declining order, are creation of repeated business, improvement of the relationship with the community, marketing advantages over competitors and attraction of new customers with only 14.2% seeing a considerable improvement and 3% a big improvement.

#### 4.2 Sustainability

As the Green Key eco-label aims to increase the use of sustainable methods in the tourism industry, we asked the Green Key site managers if they think the certification has helped them to increase the sustainability at their site. Being well aware that the term 'sustainability' covers more than just the environment but also economy and society.

The majority (92%) of the Green Key site managers state that Green Key has helped to increase the sustainability in their establishment.

As a reason of answering 'no' to the question, two thirds of these respondents state that they have just joined the Green Key Scheme and therefore are not able to measure the outcome at this point.

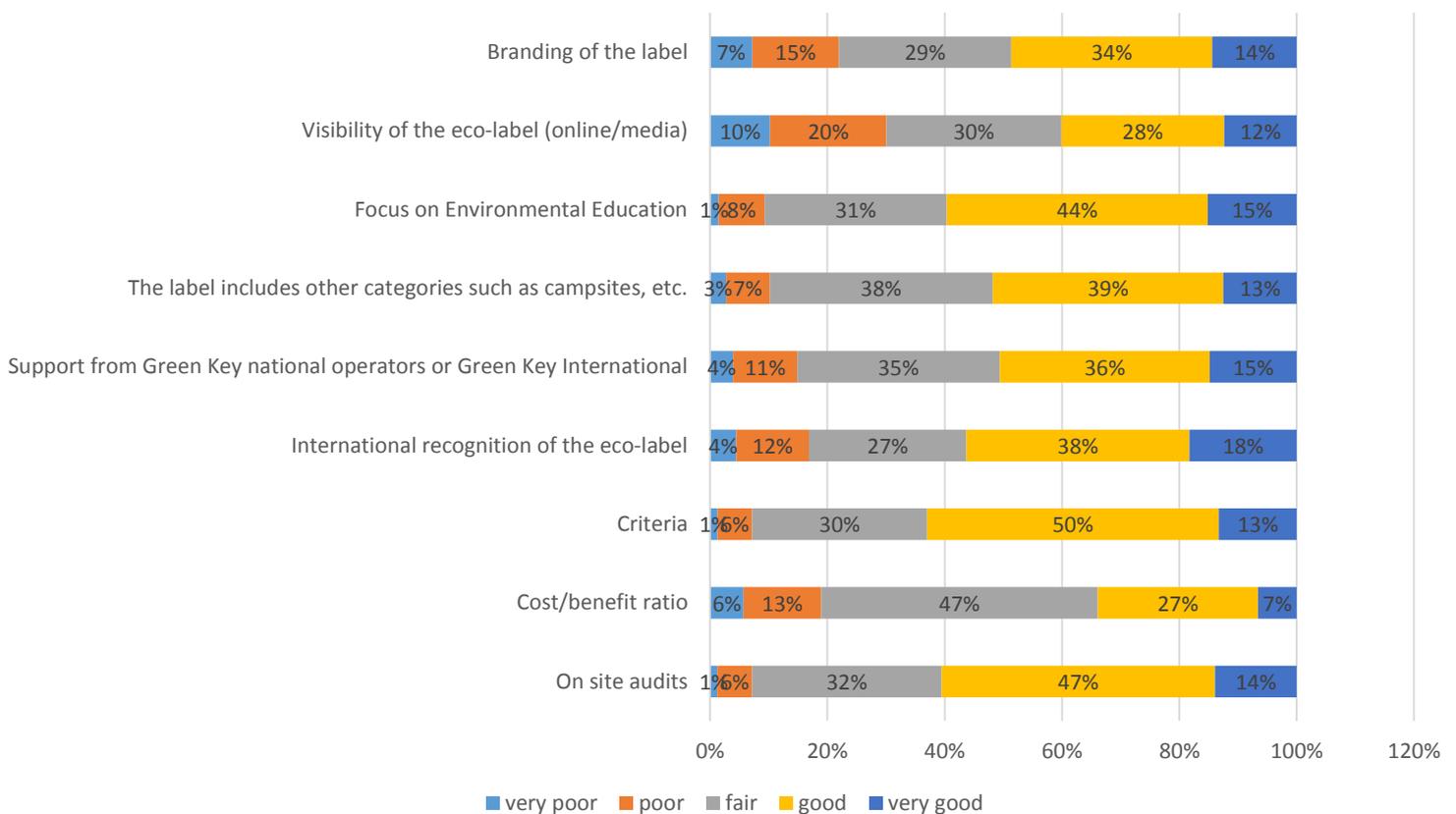


## 5. The strong points of the Green Key programme

What makes Green Key stand out in a crowded field? Establishments in the tourism industry are overwhelmed with an abundance of eco-labels to help their businesses to be more sustainable. In order to stand out, Green Key is looking for its strong points by asking what our site managers value in the programme.

The respondents were asked to rate the following points.

### How would you grade following values or points of Green Key?



The strong points of the Green Key programme according to the respondents are the criteria, on site audits and the focus on Environmental Education with respectively 50%, 47% and 44% finding these good and 13%, 14% and 15% finding them very good.

Inclusion of other categories such as campsites, smaller accommodations, restaurants, etc., which is a quite unique aspect of Green Key, is found a good asset by 39% of the respondents and even very good by 13%.

*'The one thing that I really like about Green Key is that it has the small business/accommodation owner (like myself) in mind. I really appreciate that fact, and am happy to have the opportunity to take part!'*

The branding and international recognition of the label have a moderate score with about 50% of the respondents finding it good to very good.

About 15% of the respondents do not think the support given by Green Key is a strong point of the programme.

The visibility of the eco-label is found to be the weakest aspect of the Green Key eco-label with 10% finding it very poor and 20% poor.

About one fifth of the respondents find cost/benefit ratio a poor to very poor point of the ecolabel.

In conclusion, what the Green Key managers are happy with and can be seen as assets of the Green Key programme are the fact that Green Key focuses on environmental education, that Green Key conducts on-site audits, the fact that it also includes other categories than just hotels and the criteria. What Green Key has to work on in the future is the visibility of the programme.

## 6. What can Green Key do to improve the programme?

In order to continuously develop and improve the Green Key programme, we rely on the feedback from our Green Key site managers. Therefore we included one open question which asked about the weaknesses of the programme.

Respondents were asked to answer following question:

*'What do you miss in the Green Key programme?'*

This was not an obligatory question for the respondents. Only 35,7% of the Green Key site managers answered this question. It is important to keep this in mind while reading the report as the result of this question is only based on the findings of a portion of the respondents. We decided to include the question as the results are valuable for the further development of the Green Key programme. During the analysis of the answers 9 main 'working points' came up. These are things the Green Key site managers feel are missing or should be more focussed on. There are listed in order of most frequently mentioned.

Working Point	Definition	Quote
Visibility/Marketing (31,5%)	Site Managers feel that more needs to be done to establish the label as a strong entity amongst other ecolabels. They are missing publicity on a national and international level.	<i>'We would like to label to be more visible on the internet so it becomes more known amongst local and international partners in the tourism industry. We have some trouble to exist next to the well know European Ecolabel.'</i> - B&B, France  <i>'The name Green Key has to better known, there is still too much ignorance about what the label stands for and what it contents.'</i> Camping, France
Information/Support (16%)	Managers want more information which would help their daily business such as a list of recommended environmental products, list of recommended suppliers and partners, technical advice to reduce consumption, etc. Secondly they would like to acquire more information materials to display and give to guests.	<i>'I would like to have some technical consults on how to reduce our energy consumption and information about maintenance products.'</i> Camping, France  <i>'I would like to have some display materials such a small flags and may some brochures with a simple explanation about what it means to be a Green Key hotel.'</i> Hotel, Sweden
Procedure (11,8%)	The application and renewal procedure for the Green Key award. Some site managers state the process takes too long, is too	<i>'It's is too much work to renew the certification every year. I think it should be easier to renew for the second time and following.'</i> B&B, Morocco

	complex, misses flexibility, is not clear, too bureaucratic, etc.	
Training (8,4%)	Adequate training for the environmental manager and other staff at the Green Key site.	<i>'We would like more training for all staff and the environmental manager'-Hotel, Oman</i>
Networking (7,6%)	Green Key site managers see the Green Key label as a way to set up a network with other Green Key sites, partners, local authorities, tourism industry, etc. However some respondents feel that not enough opportunities are created to do so.	<i>'I miss a community of other labelled establishments to share ideas.' B&amp;B, France</i>  <i>'Maybe it would be possible to create a cooperation with local markets, bio-suppliers in France which could be beneficial for all Green Key sites.' B&amp;B, France</i>
Guest awareness (7,1%)	Guests are not aware of (or do not care about) the efforts the Green Key sites make to make their stay more sustainable.	<i>'We have acquired the label because we care about the environment and want to be more sustainable. Our guests however don't seem the care and have no idea what Green Key is.'</i> <i>Hotel, Netherlands</i>
Corporate Social Responsibility (6,3%)	More and more establishments in the tourism industry feel the pressure to incorporate a CSR policy and feel that Green Key should have more focus on the 'social' aspects as well.	<i>'Green Key could focus more on the 'social' side of responsible businesses. Now the focus is mainly on the environmental aspects, but a business also has a social responsibility.'</i> <i>Restaurant, Netherlands</i>
Return of Investment (5,9%)	Certain establishments, mostly smaller accommodations, do not see any or not enough return of investment.	<i>'For a small establishment it is a significant investment and to this day (9 years) there was only one guest who choose us because we were a Green Key accommodation.'</i> <i>B&amp;B, Belgium</i>
Website (5,5%)	The need for an easy accessible website with a range of possibilities to showcase their establishment is a fourth issue which the Green Key site managers bring up in this survey.	<i>'An easy accessible website. We would also love to have the opportunity to market our establishment, including pictures, on the international website'</i> <i>Hotel, France</i>

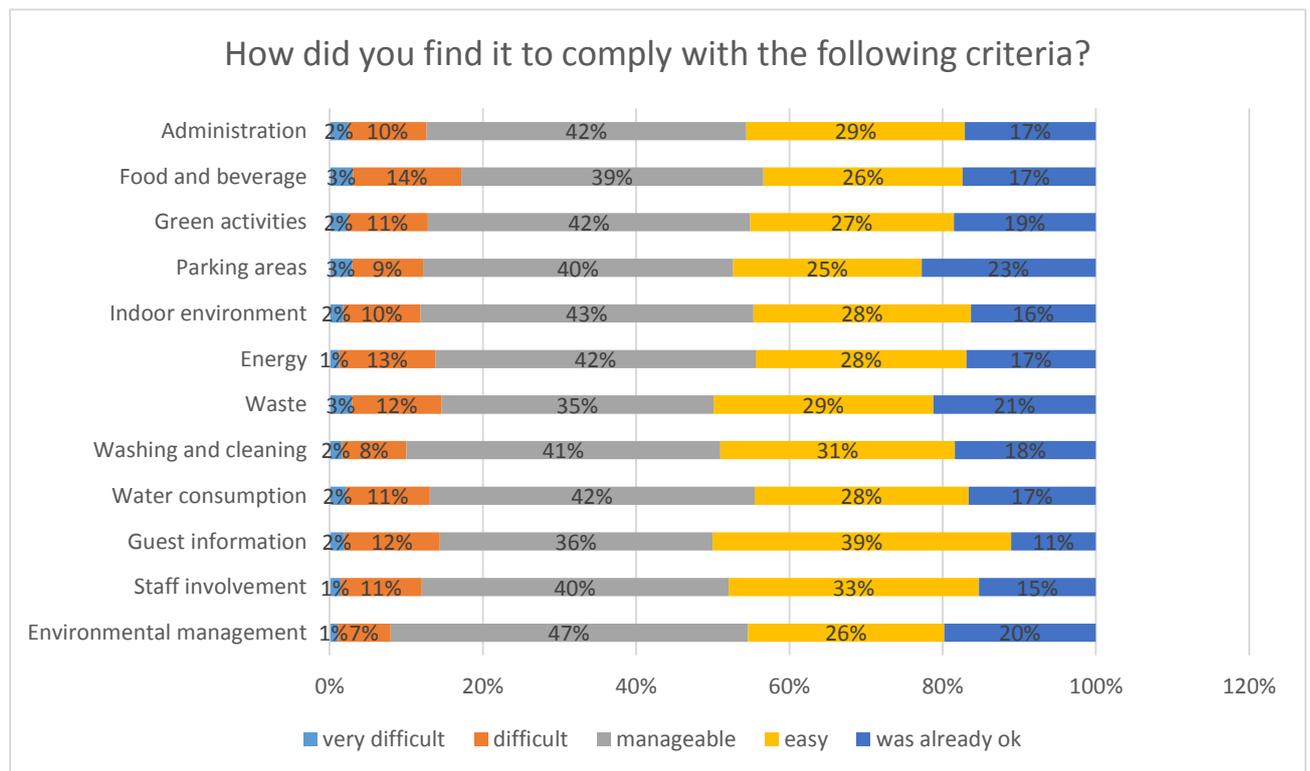
## 7. Green Key Criteria

The Green Key criteria are the main tool used for businesses to become more sustainable. Green Key has different criteria for hotel & hostels, campsites, restaurants, small accommodations, conference centres and tourist attractions. There are small variations in the various categories but they all fall under the same main sections: Environmental management, Staff involvement, Guest information, Water, Washing and cleaning, Waste, Energy, Food and beverage, Indoor environment, Parks and parking areas, Green activities and Administration. Corporate social responsibility will be a new section from July 2016, but was not yet included when the survey was conducted.

The criteria set a standard of quality of the Green Key programme. They are regularly revised to keep up with new developments and requirements within the environmental business. To ensure the quality of the programme we demand a compliance to all imperative criteria from our sites. It is however also our task to see in what way Green Key can help the Green Key sites to comply with the criteria.

Respondents were asked the rate the difficulty of compliance with the different areas of criteria.

As can be seen in the graphic below, the investment to comply with the criteria is very similar for all the criteria.



Green Key site managers find it slightly more difficult to comply with the criteria regarding food and beverage with 3% finding it very difficult to comply and 14% finding it hard to comply.

Overall, the majority of the Green Key site managers find it manageable or easy to comply with the criteria or they were already in compliance.

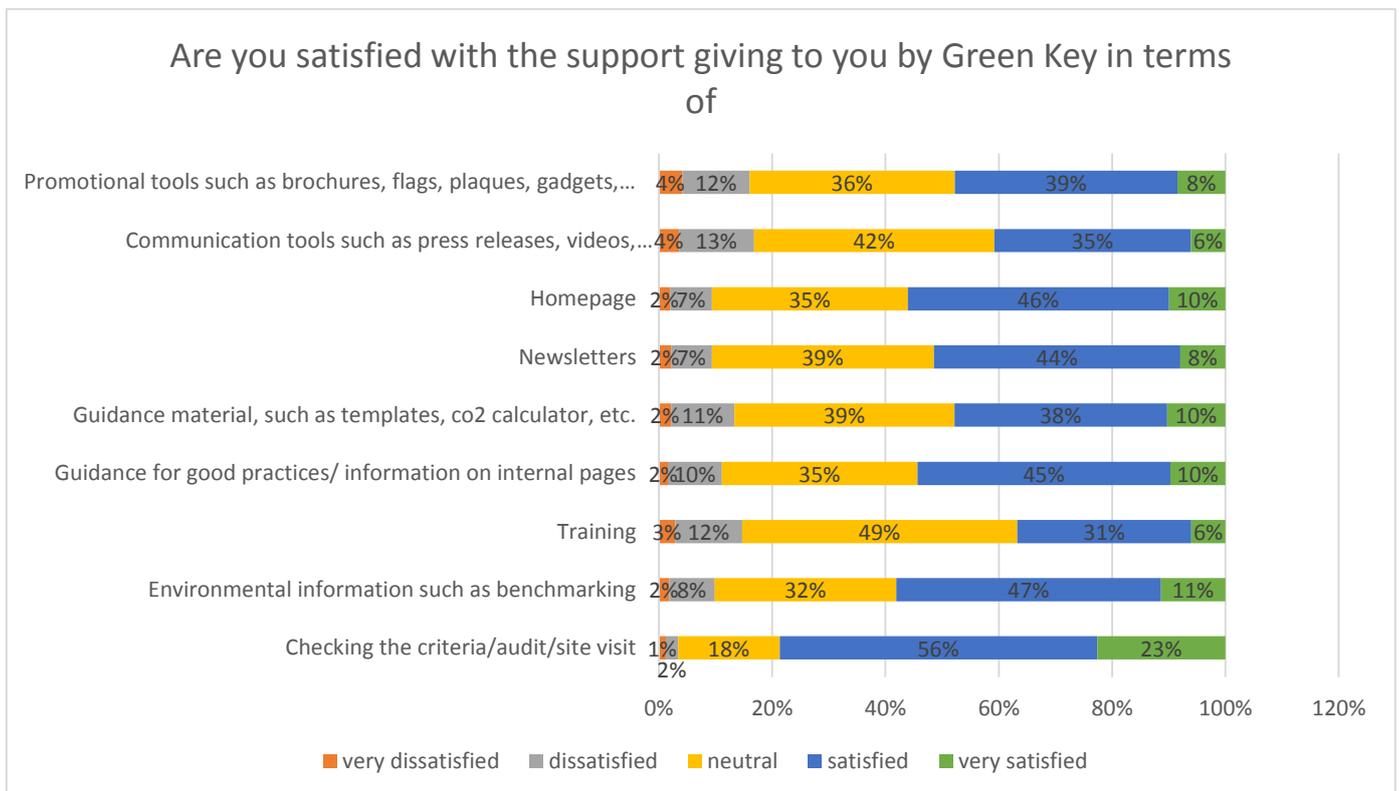
Unfortunately time and resources didn't allow to go deeper into the profile (country, category) of the sites that state that it's difficult to comply with certain criteria and the specific problems they have with this.

As it is only a low percentage of sites struggling with the criteria, support can be given on an individual basis, helping the specific sites with their specific questions.

## 8. Support by Green Key

A quite unique aspect of the Green Key ecolabel is the presence of national operators in 40 countries worldwide. These national organisations, running the Green Key programme on a national level, support the Green Key sites on a more local basis and are able to help the site managers in their national language(s). Green Key sites in countries without a national operator are managed and supported directly by Green Key International.

To improve the support giving to the site managers we asked them to rate following means of support.



In terms of support from Green Key, the Green Key site managers seem to be very pleased with the auditing aspect of the programme, being the minimum of an onsite audit in year 1, 2 and every third year from then on. 56% states to be satisfied and 23% even very satisfied.

Most of the other ways of support are rated as quite satisfying with +/- 50% being stratified to very satisfied, +/-40% being neutral and +/- 10% being dissatisfied.

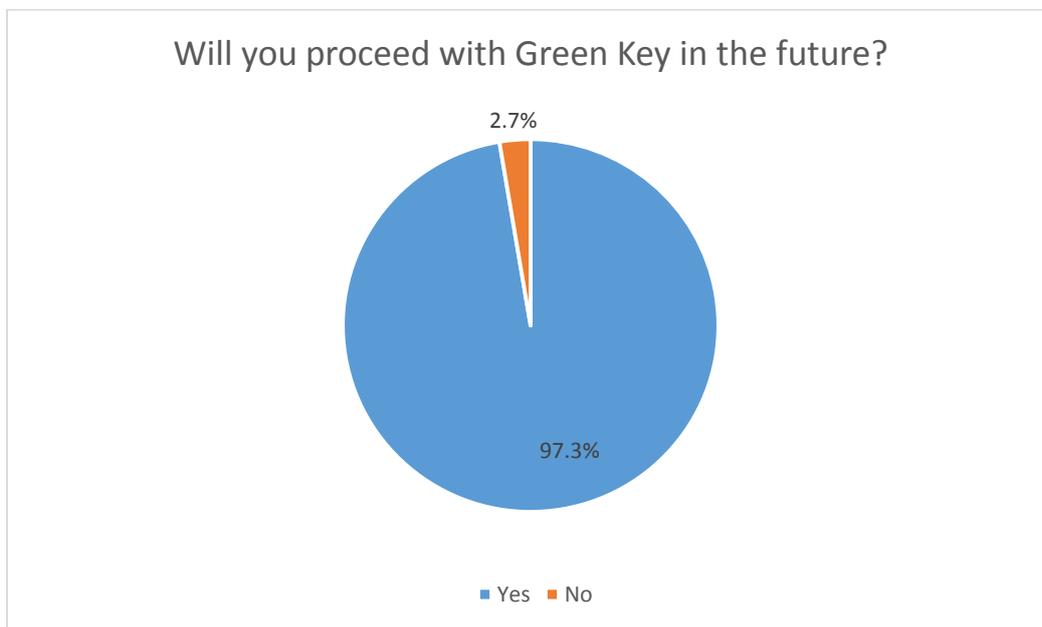
They state to be least satisfied when it comes to support giving in the form of promotional tools and communication tools.

## 9. Continuation of Green Key

As a conclusive question to the survey we asked Green Key managers if they would continue with Green Key in the future.

Almost all (97.3%) of the Green Key site managers will continue with the Green Key scheme.

17 establishment will not renew their award. As a reason for stopping with the eco-label respondents state, among others, return of investment is not high enough and too expensive for a small establishment.



## Conclusion

The results of this survey give an insight in reasons why site managers choose the Green Key label, the impact it has on their business and also gives us a small evaluation of the programme, what we can do better, what it misses and how we can support them.

The first major reason to join the Green Key certification scheme has to do with government legislation. Growing regulatory pressures impose extra motivation for hotels to comply with legislation. Though hotel and other tourism facilities are often not directly regulated, they are affected by regulatory charges such as fees and bans on certain disposal products. To comply with these regulations, they feel it is easier to join a certification scheme to help them with this. Secondly, economic reasons are important determinants to pursue a Green Key certification. Reducing costs as well as targeting the guests who seem to choose their destinations more responsibly. The actual reduction of their environmental impact and educating their guests and staff are not rated as important.

And what do the Green Key managers actually get out of it? What are the benefits, according to our managers, of joining the label? Although it is not the main reason why they joined the Green Key Scheme, the managers state that the environmental performance has improved the most. A big majority (92%) find the sustainability in general has improved at their site. 38% of the respondents see a considerable to big reduction and costs. Only 17.2% sees an improvement when it comes to attracting new customers.

The values of the programme that according to the Green Key managers stand out most are the fact that Green Key focuses on environmental education, that Green Key conducts on-site audits, the fact that it also includes other categories than just hotels and the criteria. What Green Key is missing or has to work on in the future is the visibility of the programme, the cost/benefit ratio and the support given to the managers.

In overall, the Green Key managers find it manageable to comply with the criteria. They mostly miss support when it comes to promotional materials and communication tools. Based on the open question they would like to have some more training and information that would help their daily business.

To end in a positive note, almost all (97.3%) of the responding sites will continue with the Green Key scheme.



*Green Key is a programme developed by the Foundation for Environmental Education*

*Foundation for Environmental Education (FEE) is an international organisation that has been promoting environmental education for sustainable development since 1981. FEE is an umbrella organisation with member organisations in around 73 countries around the world. ([www.fee-international.org](http://www.fee-international.org))*

*FEE is active in environmental education mainly through five programmes:*

- Green Key ([www.green-key.org](http://www.green-key.org))*
- Blue Flag ([www.blueflag.org](http://www.blueflag.org))*
- Eco-Schools ([www.eco-schools.org](http://www.eco-schools.org))*
- Young Reporters for the Environment ([www.youngreporters.org](http://www.youngreporters.org))*
- Learning about Forests ([www.leaf-international.org](http://www.leaf-international.org))*

*Through formal school education, training of staff, and awareness raising, FEE's programmes involve people of all ages and nationalities.*

