

By the following we would like to acknowledge our academic supervisor, Bernard Paque, for his help, his availability and his judicious recommendations, which greatly contributed to our reflection.

We sincerely thank all the interviewees for their time and insightful contributions: Jaqueline Daloze, Stéphanie Drothier, Michel Duquaine, Valérie Nagant & Marie Spaey.

We would finally like to thank all who had a hand in reviewing this thesis, in particular Sophie Kessler, Susan Ramsey and Thierry Streel for their precious guidance.

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INTRODUCTION

« To travel is to live » Hans Christian Andersen (1847) neatly captured Man's thrill to travel in this simple sentence. For centuries, travel was positively appreciated as a means to expand the horizon. Its perception, however, has shifted more in the last few years than in the last five centuries (Allmaier, 2019). With cruise ships coughing up toxic smoke, travellers flocking in masses to stifling tourist traps without mentioning plane's outrageous carbon emissions, the harmful effects of "taking a break" have been brought in the international limelight. The continued development of tourism to become one of today's more prominent industry has, along the way, led to the depletion of natural resources and severe pollution, resulting in 5% of global carbon emissions (Fiorello & Bo, 2012).

Nevertheless, the tourism industry, which counts 10% of global employment, is a significant source of income and job security for certain communities. It can thus lead to envision tourism, as Pololikashvili (head of the World Tourism Organization) did, as a driver of development. while managing its growth sustainably to ensure its beneficial impact on local populations and entrepreneurship (Bezaf, 2019). Therefore, is it possible for tourism to embrace multiple objectives such as environment conservation issues, economic development and the well-being local communities? The literature praises such a promising type of tourism, available since the 1980s: Ecotourism. According to the "father" of ecotourism, Ceballos-Lascurain (1996), "Ecotourism can bring numerous socio-economic benefits to a country or locality, by generating foreign exchange, creating local employment and raising environmental awareness."

The purpose of this thesis is to explore the concept of ecotourism and its implications in the tourism sector, specifically in Wallonia. This region covers about 60% of the Belgian territory and is qualified as Belgium's "green lung". The brand image currently conveyed by the tourism officials is one that allies calm, nature and adventure. Analyzing the presence of ecotourism in Wallonia consequently seems propitious. Out of the €2.9 billion spent in 2017 in the Walloon tourism industry, accommodation claims 32% alongside restauration's 33% (CGT, 2017). Given the central role of accommodation services and the given context, the thesis will aim to deliver a status report on ecotourism establishments in Wallonia and explore their key success factors through two case studies:

Ecotourism establishments in Wallonia: status report and key success factors.

Case studies of the Grange d'Ychippe and Utopia Hotel.

The paper comprises a literature review to theoretically explore ecotourism, an empirical research focused on pragmatically analysing ecotourism in Wallonia followed by appendices.

The literature review counts three chapters, the first of which will focus on tourism in general and the limitations of its industry. It will also address ecotourism through the evolution of its definition as well as its key principles and the various stakeholders associated with ecotourism establishments. The second chapter will explore best ecotourism practices based on the foundations of ecotourism: Nature and culture, the Well-being of host communities, Responsible tourists, Participation of host communities and Sustainability. The last chapter of the literature review will focus on the factors that ensure the success of an ecotourism establishment in a competitive market. For this purpose, the notion of competitive advantage will be addressed through several frameworks including Porter's value chain and Bowman's strategic clock.

The second part of this thesis consists of an empirical study of ecotourism establishments in Wallonia whereby theoretical findings from the literature review will be applied to gain insights on this region. The first chapter of this practical part outlines the tourism industry in Belgium and more particularly in Wallonia. The second chapter describes the methodology of the empirical research conducted. The objective of the third chapter is to provide a status report of ecotourism initiatives based on an evaluation of their level of involvement and a review of the presence and value of the main labels and networks in Wallonia. The fourth chapter analyses two case studies chosen for their particularly sustainable and best-of-class ecotourism practices. Theoretical competitive advantages will be analyzed against the actual practices of those two establishments. The last chapter will present the main findings of the empirical research as well as potential further research opportunities.

PART I: LITERATURE REVIEW

Chapter 1. Defining Ecotourism

The purpose of this first chapter is to define ecotourism. To begin, the tourism industry as a whole must be touched upon as well as its current trends. The ensuing limitations of traditional tourism will be discussed bringing about the emergence of ecotourism. The consequent sections will focus on refining the concept of ecotourism and singling out its principles.

1.1 Tourism & Ecotourism Landscapes

1.1.1 Importance of the Tourism Industry

Over the last decades, the global tourism industry has known nothing but growth culminating in one of the world's major economic sectors. This first section explores the incredible evolution of this industry and its influence on the global economy, why it matters as well as the current trends for the sector and their implications.

In 1950, the number of international arrivals¹ was 25 million. Since then, the industry has expanded to the point of surpassing the billion marks in 2012 and culminating in 1.323 billion international arrivals in 2017 amounting to a 4% annual growth rate. By 2030, the OECD forecasts this number to reach 1.8 billion. The growth curve prediction can be found in Appendix I. As a result, the global tourism industry has risen to be one of the world's major economic sectors generating USD 1.6 trillion in worldwide exports in 2017 (UNWTO). For the OECD area, tourism currently contributes an average of 4.2% of GDP, 6.9% of employment and 21.7% of services exports (OECD, 2019).

When it comes to the global distribution of the market share, Europe and North America accumulated the most of international flux until 1980 with 70% of international tourism expenditures and more than three quarters of international arrivals. Since then several phenomenons have influenced global tourism such as the stagnation of long trips, multiplication of short intracontinental trips, increase of distance length and democratization of plane fares, to name a few. In 2017, Europe still takes the crop with 51% of international tourism arrivals followed by Asia and the Pacific region with 24% compared to 11% in 1980 (De Myttenaere, 2018). However,

¹ International tourist arrivals are the most common unit of measure used to quantify the volume of international tourism (UNWTO, 2018).

Europe only counts 38% in terms of international receipts with Asia and the Pacific claiming a share of 29% (UNWTO, 2017). The full OECD shares can be found in Appendix II.

Recent trends all suggest a maintained growing curve, as global expenditures on travel have more than doubled between 2000 and 2016 from USD 459 billion to USD 1.2 trillion representing 7% of global exports in goods and services (UNWTO, 2017). In fact, Europe welcomed 8% more arrivals in 2017 than the previous year (671 million) and witnessed a yearly growth of 8% as well in their tourism earnings culminating at USD 519 billion. The awareness of the consequent economic contributions of this industry on the global economy has motivated the support or increase of allocated budgets regardless of the general strain on public finances (OECD, 2018).

Moreover, international expansion is only one side of the coin of the evolution of the tourism industry in the last decades. Indeed, the number of intranational tourism trips has been estimated to four times as high as international trips. In 2010, 4.7 billion domestic arrivals were estimated from the available data counting 2.1 billion domestic tourist arrivals in China (De Myttenaere, 2018).

Overall, the importance of tourism is acknowledged by the UN World Tourism Organization in their Barometer where they issued the following facts depicted in Figure 1 (UNWTO, 2018).



Figure 1. Tourism is more than you imagine (UNWTO, 2017)

On top of economic benefits, the UNWTO also acknowledged the potential influence of tourism to advance the universal 2030 Agenda for Sustainable Development and thus 2017 was declared the UN International Year of Sustainable Tourism for Development.

However, the durability of this growth and thus its continued impact relies on its capacity to adapt to up and coming economic, social, political, environmental and technological trends (OECD, 2018).

1.1.2 Current Trends of the Tourism Industry

In 2050, one of two humans will go on holiday abroad compared to the current one out of seven (Courrier International, 2019). In their 2018 Tourism Trends and Policies, the OECD identified four megatrends expected to significantly influence the future of tourism: evolving visitor demand, sustainable tourism growth, enabling technologies and travel mobility. As travel has been excluded from the scope of this paper, this section will focus on the three foremost trends: evolving visitor demand, sustainable tourism growth and enabling technologies.

A. Evolving visitor demand

Different changes in demographics over the last years will impact the tourism industry especially when it comes to visitor demands.

One of those trends is the expansion of the global middle class resulting from economic growth, especially in developing economies of Oriental Asia (China, Japan, Taiwan, Korea) and India. Coupled with an increasing international opening, this entails a huge increase of spending power for millions of people impacting their consumption patterns as well as varying growth trends across different parts of the globe (Schuiling, 2017). For instance, “international tourist arrivals in emerging economy destinations [are] projected to grow at double the rate of that in advanced tourism economies” (OECD, 2016). Indeed, this surge in international arrivals in emerging economies is anticipated to outrun developed economies for the first time in 2020 (De Myttenaere, 2018).

A second trend particularly present in developed countries is aging populations. The OECD predicts that over the next 35 years, the global population of over 60 year olds will almost double. The “silver generation” boasting increased means and time will thus represent a larger share of international arrivals. This entails an adaptation of the infrastructures to the sheer increased demand and to their particular needs and preferences.

The last demographic trend with consequent repercussions is the emergence of generation Y. These millennials enjoy complete and immediate access to information making them more demanding than previous generations. Digital technologies have their role to play in this new exigent market and can also increase the likeliness for travelers to travel independently. Digitalization has already impacted the travel agents’ role and operators and is not expected to stop.

B. Sustainable tourism growth

Sustainable tourism has been gaining momentum for several decades around the world. Unfortunately, until recently, clients have been reluctant to pay the perceived premium for sustainable travel. Nevertheless, the OECD asserts their unwillingness is starting to dwindle. Moreover, naming 2017 the International Year of Sustainable Tourism for Development was a smart move from the UN as it bumped up the sustainable tourism agenda and the potential of this industry to uphold the UN Sustainable Development Goals. In response, many countries have been looking into their tourism policies and have initiated changes “to improve the monitoring of tourism impacts, extend certification schemes, encourage the use of new technologies and green finance instruments, and generally promote environmentally sustainable and socially inclusive tourism growth.” (OECD, 2018). The expected changes are already visible in some countries. Especially in Britain where 75% of people declare the environment and sustainability as an important consideration in their choice of holiday destination (Barratt, 2019).

On top of policy improvements, the World Travel & Tourism Council (WTTC) has established the different trends in regard to the future of sustainable tourism (OECD, 2018).

First, there has been a noticeable growth in urban sustainable tourism with a surge in applications from urban regions in both quality and quantity. Next, climate change and global concern have pushed greenhouse gases emissions to the forefront of attention. The norms for such emissions are now seen as critical for all sustainable tourism project. Indeed, the tourism sector currently generates 5% of man-made CO₂ emissions (UNWTO, 2017).

The third noticeable trend is the heightened attention bestowed on the “people” factor in the tourism sector. Several factors such as “greater promotion of employment, training and workforce participation [have become] key drivers for industry development” (OECD, 2018) as discussed further in the third chapter of this paper. Finally, the general requirements of sustainable tourism have stepped up due to a general trend of more focus on assessing such initiatives.

C. Enabling Technologies

As technology advances, so does the tourism industry. The Financial Times has compiled futurologists’ predictions for the future of travel in 2050 as a result of tech breakthroughs. Distant locations will become more available for short-term trips as flight lengths shorten. Improbable destinations such as underwater hotels or temporary jungle glamping will pop up in the market. The use of virtual reality programmes will allow clients to see and feel remote locations without

travelling at all. Finally, orbital flights in the stratosphere will become available, as has already promised Virgin Galactic (Courrier International, 2019).

All in all, the shifting nature of demand and the growth of sustainability awareness in tourism have boosted the development, management and promotion of local destinations in the last two years, according to the OECD (2018).

1.1.3 Limitations of the Tourism Industry

The tourism industry has spread over the last decades to reach staggering amounts of international and domestic travelers every year resulting in the acknowledgment of its revenue generating capabilities by all parties involved. However, the tolls of what has become mass tourism must be considered. Its undeniable limitations will be developed in this section.

First, tourism engenders considerable *environmental costs* to the visited areas (Neil & Wearing, 1999). Even though tourism largely depends on the natural resources of the exploited area, this exploitation is one of the major causes of the depletion of said natural resources and the natural heritage of an area. As Christin (2014) puts it, tourism does nothing but destroy what it relies on. For instance, the OECD (2018) pinpoints overcrowding as one of the consequences of rapid and unplanned tourism which directly impacts the local residents as well as their natural environment both on which the tourism activity relies. It goes without mentioning the negative outcomes also include the increased pollution and deterioration of natural elements.

Moreover, tourism and especially mass tourism cause *social costs* to the local communities, particularly in developing economies. Kim & al (2013) suggest elevated tourist activities can heighten the property taxes and general cost of living for local communities to the point of becoming unaffordable for them (cited by OECD, 2018). Heightened poverty, begging, social destructuration, degradation of traditional culture and artisanship, drug trafficking along with prostitution are all linked to tourism growth (Eskenazi, 2008; OECD, 2018). Both valued short term economic gains and unattentive planning are roots of these negative impacts. Neil & Wearing (1999) affirm that either public authorities or industry players in charge of tourism initiatives often implement their initiatives without careful consideration of long term effects and existing legislation, consulting the local communities or protected area management guidelines.

Probable causes of social repercussions are *leakages* resulting from tourism. Neil & Wearing (1999) define leakages as “the flows of money out of a country or specific area as a result of the necessity to import certain skills, infrastructure, technologies and commodities along with

the flow of revenue in the form of profits taken out of a locale by operators.” More often than not, infrastructure developed for foreign countries are contracted by private and foreign companies, especially airlines, hotels, car agencies and package tours. These foreign owned inevitable services result in 80% to 90% of leakages in developing countries according to Mathieson & Wall (1982).

Faced with these limitations, Dr Bricker (2013) identified key factors preventing the tourism industry from responding to them. These are a lack of interest amongst stakeholders such as investors, shareholders, and suppliers, factors beyond the control of the private sector enterprise, such as government policy, the need to respond to actions of competitors and the need to promote and verify the GSTC destination and other sector involvements. Overall, these raise concern for the current government policies.

Considering these limitations, the following section addresses the emergence of a new type of tourism which could resolve these matters.

1.2 Origins and Emergence of Ecotourism

Ecotourism is a kind of tourism that addresses many limitations of the current tourism industry. In fact, “ecotourism can bring numerous socio-economic benefits to a country or locality, by generating foreign exchange, creating local employment and raising environmental awareness.” (Ceballos-Lascurain, 1996) Most important, this alternative type of tourism allows for economic growth and social integration without putting in jeopardy the safeguard of natural or cultural resources. To understand the nature of this tourism, this section dives into its origins and evolution.

A. 1940s-1960s: First traces & calling mass tourism into question

The very first origins of ecotourism can be traced back to 1939 in Estonia where the notions of nature and tourism were associated in the magazine *Loodushoid Ja Turism* (Nature & Tourism) issued by the institute for conservation of nature and tourism (Päts, 1939). It is the earliest trace of a link between the responsibility of tourism managers and planners and the responsibility of conservation and planning (Global Ecotourism Network, 2019a).

As mass tourism exploded in the second half of the 20th century, American environmental movements fostered the emergence of a new kind of tourism, conscientious about its environment. The mass tourism industry was subject to the mounting concern from the general public for the inadequate consumption of natural resources, specifically in industrialized countries. In the 1960s, governments witnessed the emergence of conservation organization aiming for the preservation of

species and even whole ecosystems, urging authorities to protect areas of land. Many cases of conscious tourism appeared in the USA around that time such as the whale watching industry which responded to the general alarm of the decreasing number of whales worldwide. The awareness generated by this industry coupled with scientists' influence succeeded to make the humpback whale a wholly protected species in 1966, shortly followed by the blue whale in 1967 (Ceballos-Lascurain, 1996). Butler (1992), declares this period marked the birth of the *ecotourist*.

The first use of the “ecotourism” concept can be traced *back to two pioneers in the matter, Hetzer and Budowski*. Claus-Dieter Hetzer, a Californian academic and adventurer who conducted the first *ecotours* in the Yucatan Peninsula (Mexico), identified in 1965 the defining principles of ecotourism in his article “Environment, Tourism, Culture”:

- Minimizing environmental impacts, (most distinguishable characteristic)
- Respecting host cultures,
- Maximizing the benefits to local people, and
- Maximizing tourist satisfaction. (cited by Weaver, 2001)

B. 1970s-1980s: Fusion of conservation & development goals

During the 1970s, ecotourism developed itself ‘in the womb’ of the environmental movement (Honey, 1999). Gerardo Budowski, the Director General of the International Union for Conservation of Nature (IUCN) from 1970 to 1976, helped in promoting the potential symbiotic relationship between tourism and environmental protection and the advantages for the host country (Budowski, 1976). Conservationists believed keeping people out of protected areas was paramount to its conservations but ecotourism proposed an alternative. Indeed, people are entitled to visit, understand, study, and enjoy protected areas. However, visitations must be managed as to not be damaging but rather helpful to the conservation of such areas (Ceballos-Lascurain, 2015). Moreover, as environmental concern and dissatisfaction with mass tourism surged, lesser developed countries started to recognize the potential to earn foreign exchange and harmlessly utilize their resources.

By the mid 1980s, ecotourism was seen as a key to fuse conservation and development goals (Weaver, 2001). Nonetheless, support for conservation activities is dependent on firsthand witnesses of endangered flora and fauna in their natural habitat. To ensure the long-term continuity of a protected area, a base of convinced advocates is crucial as they appreciate and comprehend it (Ceballos-Lascurain, 1996). For tourists interested in exploring natural areas and its wildlife across the world, legally protected areas are a foremost attraction. They provide the ultimate guarantee of

the preservation of its natural integrity and heritage as well as a cultural heritage element (Ceballos-Lascurain, 2015). However, overuse and disruption are risks to the increase of interest in nature and nature traveling. Indeed, drawbacks to tourism include the degradation of the environment and disturbance of the local community which can engender a local loss of economic benefits and disruption of local cultures and values. However, if a type of tourism is damaging in any way to its environment it cannot be defined as ecotourism. A legitimate model of ecotourism should in fact be one of the most powerful tools for protecting the environment and the only type of tourism that should be allowed in protected areas (Ceballos-Lascurain, 2015).

C. 1990s: Official recognition

In 1983, Hector Ceballos-Lascurain,² a Mexican conservationist, was the first to coin the term “ecotourism”. Proclaimed the father of this new type of tourism, he attributed its rise in popularity to Elizabeth Boo and her 1990 essay “Ecotourism: The Potential and Pitfalls”. In the year of its publication, The International Ecotourism Society (TIES) was founded, recognizing this new type of tourism globally and establishing itself “as the first international non-profit dedicated to ecotourism as a tool for conservation and sustainable development” (TIES, 2019a).

1.3 The Definition(s) and Principles of Ecotourism

The end of the 20th century was marked with the emergence of sociocultural, economic and environmental concerns which pushed the emergence of sustainable development. For the tourism industry, this concern translated into the emergence of alternative types of tourism such as ecotourism as well as nature-based tourism and sustainable tourism. Over time, more and more initiatives flourished reflecting a greater responsabilization of tourism actors and tourists themselves (De Myttenaere, 2018). Many authors have poured over the matter and attempted to define and differentiate these different types of tourism. The following section presents a dissection of the existing literature to expose the differences between the alternatives to mass tourism and establish the definition of ecotourism as presented in this paper as well as its principles.

² Hector Ceballos is now the Director General of the Program of International Consultancy on Ecotourism (PICE) and a Special Advisor on Ecotourism to IUCN (The World Conservation Union), and the World Tourism Organization (WTO).

1.3.1 The Definition(s)

When delving into the literature, a plethora of different terms and definitions try to capture the greener alternatives to mass tourism (Stabler & Goodall, 1996). As of the beginning of the 1990s, Scace et al. had already catalogued 35 terms that “may possess links to ecotourism” in a 1991 report for the Canadian Environmental Advisory Council (cited by Ceballos-Lascurain, 1996). This list includes nature tourism, nature-based or nature-oriented tourism, wilderness tourism, adventure tourism, green tourism, alternative tourism, sustainable tourism, appropriate tourism, nature vacations, study tourism, scientific tourism, cultural tourism, low-impact tourism, agro-tourism, rural tourism, and soft tourism (Ceballos-Lascurain, 1996). Although some notions are shared amongst these terms, their meanings are not equivalent in which case ecotourism would be attributed to any and all activity pertaining to tourism and nature (Farrell and Runyan, 1991). An examination and specification of the definition of the term ‘ecotourism’ is thus necessary to move further on with this paper. Ceballos-Lascurain (2015) has developed the classification, seen in Figure 2, of the different concepts of tourism.

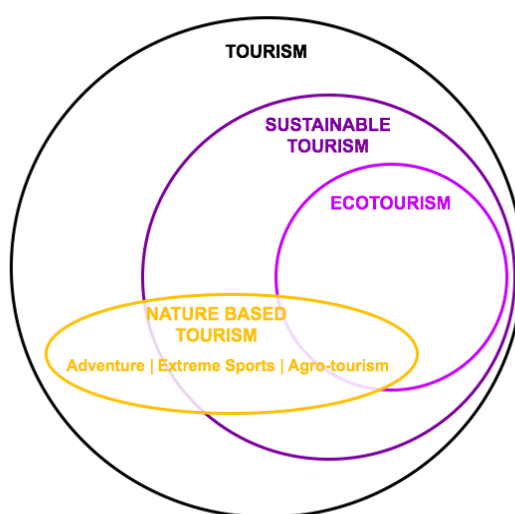


Figure 2. Ceballos-Lascurain’s depiction of the tourism industry (Ceballos-Lascurain, 2015)

Tourism

The outermost circle delineates the entire tourism industry. As described in the first section of this chapter, the tourism industry has in general faced an impressive growing curve since the 1950s to reach 1.3 billion international arrivals in 2017 and predicted to grow even more to surpass the 1.8 billion by 2030. Two important trends of this industry for the years to come are an evolving nature of the demand and the growth of sustainable tourism.

Sustainable tourism

Sustainable tourism is here depicted by Ceballos-Lascurain (2015) as the first subset of this industry. The World Tourism Organization defines it as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2005). In short, every type of tourism that applies the concept of sustainable development is considered sustainable tourism (Integra, 2019): slow tourism, community-based tourism, fair tourism, solidary tourism and ecotourism (Passion Terre, 2019). This type of tourism represents 1% of the tourism market in Western Europe and has grown by 20% in the last few years (Center for Responsible Travel, 2017).

Nature-based tourism

The yellow section of Figure 2 depicts nature based tourism or nature tourism. This hybrid category of tourism includes many different subcategories such as adventure-, extreme sports- and agro-tourism. These types of tourism can thus belong to different subsets depending on their individual practices. According to the Rainforest Alliance, nature-based tourism accounts for about 20% of international travel (Barrat, 2019).

Ecotourism

The ecotourism subset of sustainable tourism aims at preserving the environment and educating tourists on the local natural and cultural surroundings. The difference between nature-based tourism and ecotourism lies in the latter's intent on "the enhancement or maintenance of natural systems." (Farrell and Runyan, 1991) This is corroborated by Norris (1992), who clearly states that activities are qualified as ecotourism only if they directly contribute to an improved conservation. Although some types of tourism help tourists gain knowledge and understanding of the natural environment, if they do not positively impact it, they are not considered as ecotourism activities (Ceballos-Lascurain, 1996). Furthermore, Ziffer (1989) differentiates nature-based tourism as "grounded in the behaviour and motivation of the individual whereas 'ecotourism' is a more comprehensive concept which is based on a planned approach by a host country or region designed to achieve societal objectives beyond (but including) those of the individual." (cited by Ceballos-Lascurain, 1996).

Now that the different types of tourism have been mapped against each other, the concept of ecotourism can be further refined. All the existing definitions of ecotourism collectively touch

upon three areas: environment, society and economic development. However, not all authors encompass these three notions in their definitions.

For instance, Hector Ceballos-Lascurain's preliminary definition of ecotourism in 1983 only mentions the environmental and social aspects: "Traveling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring, and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas." Upon its foundation, The International Ecotourism Society (TIES) proposed a similar definition introducing the notion of the activity's positive environmental and social impact: "Responsible travel to natural areas that conserves the environment and improves the well-being of local people." (TIES, 1990)

While the early definitions focus mainly on the tourists' experience of nature, the 1990s' definitions featured several principles in line with sustainable development (Weaver, 2001). Nowadays, several other institutions have developed or updated their own definitions of the type of tourism like TIES which again focuses on the environmental and social factors: "responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education." (Blangy & Wood, 1992) These definitions, however, incorporate the normative aspect that ecotourism brings to nature tourism. Indeed, "ecotourism's underlying premise is that the enjoyment of future generations would not be affected negatively by that of today's visitor's." (Ceballos-Lascurain, 1996) On the other hand, Wild (1994) describes ecotourism as "combining conservation with economic development" and the OECD (2018) confirms by defining ecotourism as "a significant alternative development strategy due to its ability to link local income generation directly through conservation initiatives" which showcases the link between the environmental concern and economic aspect of ecotourism.

In 1993, Ceballos-Lascurain proposed a more rounded definition, adopted by the International Union for the Conservation of Nature (IUCN) in 1996: "*Environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features - both past and present) that promotes conservation, has low visitor impact, and provides for beneficially active socio-economic involvement of local populations.*" (cited by Ceballos-Lascurain, 2006). For the purpose of the paper, this last definition will be chosen to depict ecotourism as it englobes the most relevant defining criteria which cover the three considerations common throughout most definitions:

environmental, social and economic. “Sustainability has frequently been described as having three pillars or dimensions: environment, economy, and society” declares Wu (2013). He continues; “to achieve sustainability is to simultaneously achieve environmental, economic, and social sustainability.” Evidently, ecotourism relies on and must respect these three pillars, also called the triple bottom line of sustainability. Not to mention, the United Nations have declared these three pillars as the three dimensions of sustainable development (Service Public Fédéral Belge, 2019). In this paper, ecotourism will thus be referred to as tourism with a normative role of supporting sustainable development. In other words, it is a type of sustainable tourism that regulates and favours the protection of the environment. Figure 3 depicts ecotourism and its three pillars as it should be interpreted in the context of this paper.



Figure 3. The three pillars of ecotourism

1.3.2 Principles of Ecotourism

On top of Hetzer’s four preliminary principles, TIES have also developed a set of ecotourism principles destined for adoption by all who partake and market ecotourism activities. These principles are based on three different pillars; conservation, community and sustainable travel:

- 1) Minimize physical, social, behavioral, and psychological impacts.
- 2) Build environmental and cultural awareness and respect.
- 3) Provide positive experiences for both visitors and hosts.
- 4) Provide direct financial benefits for conservation.
- 5) Generate financial benefits for both local people and private industry.
- 6) Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries’ political, environmental, and social climates.

- 7) Design, construct and operate low-impact facilities.
- 8) Recognize the rights and spiritual beliefs of the indigenous people in your community and work in partnership with them to create empowerment (TIES, 2019b).

These principles reflect the regulating nature of ecotourism for the protection of the environment and are manifested in many of the certification standards for ecotourism establishments as discussed further in this chapter.

One must be wary, however, that ecotourism can lead to similar repercussions as mass tourism if not treated carefully. Mieczkowski (1995) declares “Without appropriate regulations, problems of overexploitation, and in particular ecological degradation, may be intensified with the development of ecotourism.” (cited by Neil & Wearing, 1999). Ceballos-Lascurain (1996) underlines the importance of sufficient investment in and limiting visitations to protected areas to avoid their deterioration. However, his analysis shows little priority given to tourism planning and coordination at the end of last century when progressive planning and policy frameworks were inevitable to implement sustainability objectives at a large scale (Neil & Wearing, 1999). Ecotourism development is thus dependent on an overall policy framework as well as a high degree of collaboration between all stakeholders.

1.4 Main Stakeholders

When tourism activities are developed with the engagement of broad stakeholders and in accordance to sustainable development principles, they can bring economic growth as well as social integration and benefits. In order for ecotourism to be adequately planned for and implemented, it requires an effective planning and the involvement of a multitude of stakeholders, each with their own interests and objectives. They each intervene at particular phases of the development and management of ecotourism sites, some more prominently than others. For ecotourism initiatives to be successful, Drumm and Moore (2002) emphasize on the “formation of strong partnerships so that the multiple goals of conservation and equitable development can be met”.

The premises of such interactions have been present since the beginning of the 1990s as ecotourism operators began to seek out partnerships with protected area managers and local communities as a way to encourage the conservation of natural habitats, local development and foster communication between tourists and natives (Wallace, 1992). By leveraging these partnerships adequately and thus effectively managing ecotourism, its potential is fully exploited.

In other words, bringing socio-economic benefits to specific regions, developing foreign exchange, increasing local job offers and boosting environmental consciousness overall (Ceballos-Lascurain, 1996).

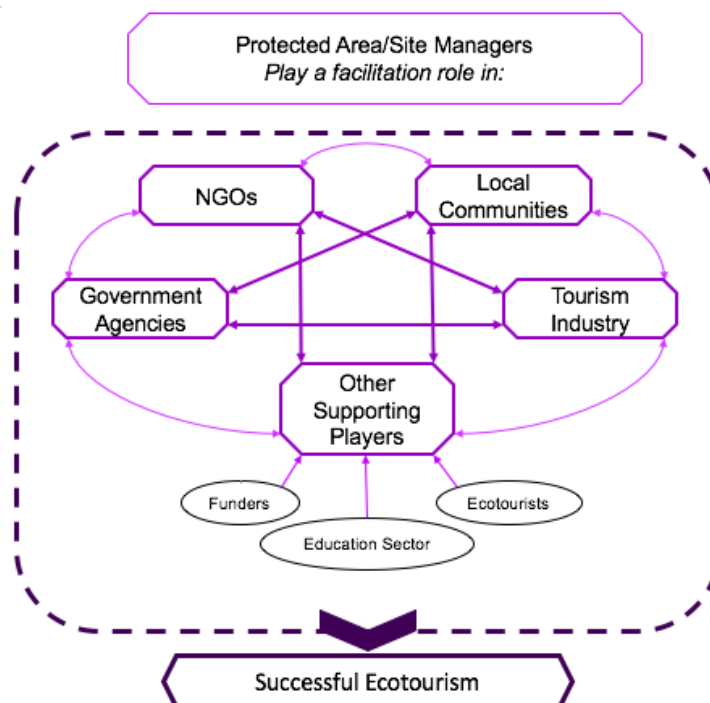


Figure 4. Ecotourism partnerships needed for success (Drumm & Moore, 2002)

Figure 4 depicts Drumm & Moore's (2002) representation of the main stakeholders of ecotourism and the necessary partnerships amongst them that result in an effective ecotourism. This section of the paper will focus on defining the players, their roles and responsibilities for the planning and implementation phases and the links binding the parties. The core decision makers are protected area personnel (site managers), local communities, the private tourism industry players, international and national governments and nongovernmental organizations. The supporting players include diverse fund providers, the education sector and ecotourists themselves.

1.4.1 Core Decision Makers

A. Protected area/Site managers

The personnel directly in charge of maintaining and managing natural resources or protected sites on a daily basis are held most responsible for its preservation. This category includes biologists, botanists or wildlife specialist in charge of protecting marine and terrestrial sites. These

specialists hold the primary information when it comes to the local flora and fauna and will probably be the first to notice any change or damage in the natural habitats resulting from tourism (or not) (Ceballos-Lascurain, 1996). Being the primary authority in this respect, their crucial roles lies in their input in educational programs and impact in monitoring systems.

For the success of their ecotourism activity, protected area managers must be able to foster relationships with local residents and leaders as well as tourism industry actors such as tour operators, travel agents and government tourism agencies. In doing so, they have more chances of guiding the interests of other players towards conservation of the protected area. At the request of a protected area's administration, NGOs may be required to fulfill this role (Drumm & Moore, 2002).

B. Local Communities

In tourism development and management, local communities can be neglected due to their remote and dispersed locations hindering communication. In other cases, communication with local residents is voluntarily avoided for the pretext of gaining time and avoiding potential barriers or even to prevent them from expected economic gains (Ceballos-Lascurain, 1996).

Despite the heterogeneous quality of this category of stakeholders, Drumm & Moore (2002) managed to make some general observations. More often than not, local communities living in attractive natural areas are unprepared for tourism in general. Either they are unable to prevent the monstrous tourism industry from exploiting their land or keep persistent explorers out, or even to grasp the intricacies of all the costs and benefits of the industry due to their lack of experience. In any case, every type of tourism will intrude in their personal life and impact their privacy while hopefully providing possibilities of increasing their income. If done right, ecotourism would also provide a means to conserve their homeland.

Contrary to all other players, local communities may not have chosen to be a player of ecotourism. Nonetheless, "equity and practicality require that they be active decision makers in ecotourism planning and management" as tourists are attracted by their environment (Drumm & Moore, 2002). Their role also concerns their consumption of natural resources and relationship with the environment which are determinant in the success of any conservation efforts for the protected area and bordering lands. Moreover, ecotourism experiences rely on the education of visitors to the local knowledge and traditions, making local culture and thus communities a critical element in ecotourism.

Ultimately, any ecotourism initiative should plan for local communities to redeem their share of the gains. It is also in every party's interest to consult locals on what kind and level of tourism activity they consider fit for their environment. Ceballos-Lascurain (1996) concludes by stating "If their involvement is not sought, ecotourism will certainly not be possible."

C. Tourism Industry

The tourism industry regroups by far the largest number of actors including "tour operators and travel agents who assemble trips; airline and cruise ship employees; minivan drivers; staff of big hotels and small family lodges; handicraft makers; restaurant owners; tour guides; and all the other people who independently offer goods and services to tourists." (Drumm & Moore, 2002) The diversity of scale and nature of all these actors add to the already complex nature of this sector; however, the interest in financial gain is common for all. Even if sustainability is part of their objective, ultimately, the prosperity of a company relies on economic gain.

Ceballos-Lascurain (1996) underlines the power of all these actors to influence a traveler's choice of destination and activities and their overall experience. Tourism industry players are "a vital source of information about demand trends, promotion and marketing" (Ceballos-Lascurain, 1996). However, efficient partnerships with protected area managers and local communities can be strained or difficult to form due to the complex nature of this sector.

According to Drumm & Moore (2002), this industry is of great value to ecotourism in three ways. First, they hold an incredible knowledge base of travel trends, consumer behaviors and desires. Moreover, they hold the power to influence consumers to scale down their environmental impact in protected areas which leads to their third role of promoting ecotourism. Reaching the clients through diverse media and means of promotion is one of their fortes allowing them to inform clients of ecotourism destinations. The vitality of marketing for ecotourism will be further discussed in the next chapter of this paper.

When it comes to industry-led policies regulating the actors of the tourism industry, Neil & Wearing (1999) summarize the methods as "striking a balance between self-regulation and imposed regulation." As regulating environmental impacts is crucial to ecotourism, a proactive stance in the matter would be preferred. However, self-regulation of environmental impacts has not met success in other industries such as mining and agriculture. Birtles and Sofield (1996) were speculative

about the effectiveness of self-regulation if applied to the diverse and multilayered context of the tourism industry (cited by Neil & Wearing, 1999). Nevertheless, Neil & Wearing (1999) depicted the five practices of regulation for ecotourism depicted in Appendix III. The three main ones are presented below.

i) Codes of practice

These positive initiatives of general behavior guides for the industry are rendered ineffective as no requirements for participation stand nor enforcement policies. A list of the four primary contingency areas for codes of conduct has been erected by Mason & Mowforth (1996). They are the Monitoring take-up and effectiveness, the Use of codes as a marketing tool, the Need for coordination, the Question of whether self-regulation or external regulation should be utilized (Neil & Wearing, 1999). Therefore, every code of conduct should be evaluated and the results recorded to prove its validity.

ii) Compliance

The informal and voluntary-based compliance schemes have the dual objective of developing “environmental constraints for the industry and improve the type and nature of the experiences for the visitors.” (Neil & Wearing, 1999) The difference with codes of practices lies in the potential requirement of operators to sign an agreement and be subject to its principles and intentions. For instance, Green Globe³ is one of those compliance schemes.

iii) Accreditation

Neil & Wearing (1999) define accreditations as formal and voluntary credentials that can be awarded by the industry or an external body. They provide a guarantee of trust for tour operators and ecotourism service providers to attract and encourage clientele. In other words, security and quality of experience are enforced for both operators and tourists. Being accredited could be considered as a competitive advantage when it comes to marketing in the highly competitive market, as discussed in the next chapter, and supports the marketing of verified companies (Global Ecotourism Network, 2019a). They also offer the chance to revise industry standards, to protect natural areas of which ecotourism is tributary and encourage tourists to make informed decisions and adopt appropriate practices.

³ Created after the United Nations Rio de Janeiro Earth Summit in 1992, this international compliance scheme is supported and recognized by the WTO and the WTTC.

The self-regulating aspect of the accreditation process has encountered some concerns which have, as anticipated by Neil & Wearing (1999), dialed down due to the numerous accredited ecotourism players which keep each other in check and the generalization of external auditing. The accreditation criteria have also been continuously reviewed and raised throughout the years. A prominent type of accreditation in the ecotourism industry are the ecolabels.

Ecolabels have been increasingly used since the 1990s due to a greater shift towards market-based instruments. Their aim is to aid in providing consequential environmental benefits by positively influencing the consumer's purchasing decisions International Institute for Sustainable Development, 1994). These labels generally aim to reward tourism stakeholders (accommodations, local authorities, etc.) who take into account sustainable characteristics such as global environmental policy, water management, energy savings, waste management, etc. Labels thus contribute to promote a more sustainable tourism. The OECD generally controls their design and implementation and certification schemes and labels can be internationally, nationally or regionally recognized.

In their 'Handbook of Ecotourism Labelling Criteria and Good Practice in Europe'⁴, Tsipidis (2009) affirms "certification programs are intended to go beyond the "greening" of the tourism industry or nature tourism. Their fundamental principles are created through broad stakeholder participation, whose eventual tenets weigh equally internal and external environmental, socio-cultural and economic impacts." The handbook also points out the five common components of certification programs: Voluntary enrollment, logo, complying with or improving upon regulations, assessment and auditing and finally, membership and fees. Hereunder is a continued list of ecolabels recognized for their scale and/or suitable criteria.

⁴ This guide was Published on behalf of the Eco-Destinet Network by the Bulgarian Association for Rural and Eco Tourism (BARET). The Eco-Destinet Network aims at developing a European quality label for ecotourism destinations.

Labels	Key numbers	Market sector	Main criteria
ECO Certification Program	The label has been around since 1996 and was one of the first programs of its kind in the world and counts 181 accommodations 1,389 tours and 82 attractions (Ecotourism Australia, 2019)	Establishments in all sectors of the travel and tourism industry (Ecotourism Australia, 2019)	Business management and operational planning, Responsible marketing, Customer satisfaction, Environmental management, Interpretation and education, Contribution to conservation, Working with local communities, Cultural respect and sensitivity (Ecotourism Australia, 2019)
Green Key	Voluntary eco-label awarded to more than 3,000 hotels and other establishments in 57 countries and 253 in Belgium (Green Key, 2014)	Hotels and hostels, Campsites and holiday parks, Small accommodations, Conference centers, Attractions, Restaurants (Green Key, 2014)	Staff involvement, Environmental management, Guest information, Water, Energy, Washing & cleaning, Food & beverage, Waste, Administration, Indoor environment, Green areas, Green activities, Corporate social responsibility (Green Key, 2014)
EU Ecolabel	As of 2019, 1,575 licenses have been awarded for 72,797 of products and services available on the market. In Belgium, there is only one hotel with the EU Ecolabel (European Commission, 2019a)	Personal care products, cleaning up, clothing and textile products, electronic equipment, coverings, furniture and bed mattresses, gardening, lubricants, paper products, tourist accommodation (European Commission, 2019a)	For tourist accommodation: General management, Energy, Water, Waste & Wastewater (European Commission, 2019a)
Travelife	Web-based certification system present in 50 countries with 1,500 members (Travelife, 2019)	Tour operators & travel agents, Hotels & accommodations, Holiday-makers (Travelife, 2019)	Business policies, legislation, communicating your progress, staff & budget, energy, water, solid waste, pollution & erosion, wildlife, labor and human rights, community integration, suppliers, guests (Travelife, 2019)

Biosphere Responsible Tourism	The certification is developed based on the 17 Sustainable Development Goals (SDGs) of the UN's 2030 Agenda (Responsible Tourism Institute, 2019)	Destinations, accommodations, tourists sites and parks (Responsible Tourism Institute, 2019)	Focus on: Climate change, environment, social, economy and culture. These criteria are based on the UN Sustainable Development Goals (Responsible Tourism Institute, 2019)
Green Globe Certified	Green Globe provides certification, training & education, and marketing services in 83 countries. It was established in 2002 to maintain quality of assessment services offered through accredited certification bodies (Green Globe, 2019)	Covers all tourism and travel industries (Green Globe, 2019)	Focus on: Sustainable management, social and economic management, cultural heritage and the environment (Green Globe, 2019)

Table 1: International ecolabels recognized for their scale and/or suitable criteria

All in all, only a few of the multiple certifications that exist within the tourism industry and especially when it comes to sustainability, are mentioned in this paper. The labels presented in the above table have been selected for their prevalence and recognition by both tourism professionals and public authorities. A more comprehensive description of each of these labels can be found in Appendix IV. of this report.

These labels are a way to prevent businesses to abuse of “greenwashing” by guaranteeing their respect of measurable and important criteria. The word greenwashing refers to “the practice of making unwarranted or overblown claims of sustainability or environmental friendliness in an attempt to gain market share” (Dahl, 2010).

D. Government Officials

Government officials and public authorities have an impact in ecotourism planning, development, management and regulation. They probably have the biggest potential to shape ecotourism by coordinating and articulating national and international goals for ecotourism. Government officials provide leadership as they are the only body able to carry out “long-term planning and management as legislative and juridical protection of nature reserves for the benefit of future generations.” (Neil & Weaver, 1999) Their national influence allows them to create national ecotourism plans as the National Ecotourism Strategy in Australia to which the government also engaged AUD 10 million for its development and implementation (Preece & al., 1995). Their national influence equally includes policy building for protected areas.

Moreover, public authorities provide vision for the tourism industry (Drumm & Moore, 2002). Mieczkowski (1995) and Tolhurst (1994) present the influence of public authorities and their role in ensuring harmony, consistency and enforceable standards for the global tourism industry due to the inefficiency of regional regulations towards environmental sustainability (cited by Neil & Wearing 1999). In fact, McKercher (1991) states that the union of federal, state and local policies and legislation is crucial for effective control measures in the tourism industry (cited by Neil & Wearing, 1999). Moreover, they have the power to restrict the activities of the private sector. For instance, they can impose the employment of local residents for relevant tasks and regulate developers’ property ownership rights (Drumm & Moore, 2002). Indeed, Neil & Weaver (1999) praise the ability of government policy to “enforce necessary environmental regulations, set broad industry standards and therefore assist in minimizing negative impacts, and hence has a major role to play in facilitating sustainable ecotourism practices.” A third area that falls under their responsibility is the wide range of infrastructure supporting the ecotourism activities in protected areas. This goes from small scale access tracks, to airports, to health clinics in rural areas. Finally, their role also includes promoting and advocating for ecotourism, for instance through a national tourism campaign (Drumm & Moore, 2002).

To exercise their role, government officials have a series of tools of government policy at their disposal to tackle environmental problems of the tourism industry listed by Neil & Weaver (1999); legislation, regulation (including revenue collection and redistribution), control in the coordination of policies and programs infrastructure and incentives planning and promotion between national and local level ecotourism ventures.

However, government officials also bear their fair share of limitations. Neil & Wearing (1999) target the inability of governments to deliver their plan as implementation often requires additional international funding and consultants. Moreover, Ceballos-Lascurain (1996) points out the back seat the tourism industry takes at the ministerial level as its preoccupations are often not considered by other ministries. It is regrettably also the case for the environment even to this day. Since 1996, little progress has been made to integrate environmental responsibilities to other ministries thought to be more important. The resignation of Nicolas Hulot from the French government in August 2018 clearly illustrates the losing position of the environment in such a system. Other limitations include the changing interests of regularly elected representatives and the instability of some political regimes that prevent any long-term planning for ecotourism or even tourism. Which leads to Neil & Wearing's (1999) conclusion, "the development of strategic plans and control mechanisms are only as effective as the will to implement them."

E. Non-Governmental Organizations

Non-Governmental Organizations (NGOs) provide essential financial and technical assistance to ecotourism initiatives (Ceballos-Lascurain, 1996). Additionally, they function as a communication platform for a large quantity of dispersed interest parties and connects them together. Their role lies in the implementation phase of ecotourism either directly as program managers or site administrators (at the request of local employees) or indirectly as trainers, partners of ecotourism establishments and in certain uncommon cases as ecotourism services providers. Drumm & Moore (2002) classified NGOs into two categories based on their commercial nature.

First, *tourism associations with a lucrative objective* count private tour operators, airlines and hoteliers, ecotourism associations regrouping all involved players of the sector per country or region and other trade organizations handling travel issues. The typical characteristics of such organizations include paid membership, which entails subscription to a set of principles or code of ethics dictated by each NGO, and periodic publications (e.g. newsletters) that communicate relevant industry problematics and events, which is one of their most efficient functions.

Amongst these NGOs, the International Union for Conservation of Nature (IUCN) was established 70 years ago with over 1300 members worldwide to this day. Their mission is to "Influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable." (IUCN, 2019) Amongst the different sectors they cover, they aim at helping the tourism industry to preserve the natural resources on which it is dependent. In practice, the IUCN

targets conservation organizations in the process of developing an ecotourism activity and provides them with the necessary resources to do so such as business skills and market viable and effective tools for conservation, mostly in the format of guidelines.

The second category of NGOs are *non-profit groups* focusing on conservation and development and maybe even directly on ecotourism. These private institutions have a coordinating role between in particular protected area managers in particular and local communities as well as the rest of the core players of ecotourism.

The International Ecotourism Society (TIES) is amongst the network organizations that is dedicated to advocate for ecotourism as a viable tool for conservation protection of biocultural diversity and sustainable community development in over 190 countries. From 1990 onwards, TIES, being the oldest and largest ecotourism society, has provided guidelines and standards, training, technical assistance and educational resources to its members and in so doing, promotes the principles of ecotourism (mentioned previously). Their members include tour operators, lodge owners, affiliated businesses, universities, students, NGOs, associations, professionals and travelers⁵ (TIES, 2019a).

1.4.2 Supporting Players

A. Funders

Funding is probably the biggest hurdle that developers encounter. In this regard, funding entities are considered a major stakeholder even though they are not involved in planning decisions for ecotourism and its implications for a protected area. These entities include banks, investment corporations, bilateral and multilateral international development agencies such as the World Bank and the Inter-American Development Bank, private investors, venture capital funds such as the EcoEnterprise Investment Fund, NGOs and private banks (Drumm & Moore, 2002). Their critical role is supporting and providing the initial funds for ecotourism planning and development as protected area budgets are often limited. Numerous institutions benefit from government agency funding like USAID, GTZ and DFID (the governmental foreign aid departments of the US,

⁵Due to differences in opinion about financial transparency and direction, the Board left TIES in 2015 and launched the Global Ecotourism Network. GEN's mission includes advocating for ecotourism, providing a platform for indigenous populations and acting as a think-tank for sustainable tourism. On the contrary to TIES, GEN is not a membership fee organization inviting interested parties to collaborate with them in the pursuit of their mission (GEN, 2019a).

Germany and the UK). Moreover, several international development agencies have created environmental departments to evaluate funding requests based on environmental impact. The list includes the World Bank, the Inter-American Development Bank, the Organization of American States and the Asian Development Bank (Ceballos-Lascurain, 1996).

B. Academics

Albeit taking a secondary seat in ecotourism development, academics hold a valuable role in the planning and daily functions of ecotourism. Scholars are particularly useful to identify, define and outline tourism and ecotourism matters of contention and keep the other stakeholders on their toes and encourage them to hold their established objectives. Academics thus maintain important coordination with NGOs, governments and local communities not only through shaping the theoretical rationale but also by conducting research that provides valuable insights to all parties (Drumm & Moore, 2002).

C. Travelers

An ecotourist is defined by Blamey (1997) and Burger, Gochfield & Niles (1995) as “anyone traveling with the primary motivation of viewing, enjoying, and experiencing nature in a relatively undisturbed or uncontaminated natural area and undertaking at least one ecotourism experience during their trip” (Blamey, 1997; Burger et al., 1995).

Ceballos-Lascurain (1996) praises ecotourists as the driving force of ecotourism. Indeed, even though few actually take part in decision-making, Boo (1992), recommends planning strategies to carefully consider travelers’ thoughts and preferences. In order for them to make informed travel decisions and take part in the conservation efforts once on site, she emphasizes on the importance of educating said travelers in the costs and benefits of ecotourism. Indeed, all of their decisions, going from the destination to the excursions, including travel agents, contribute to the overall favorable or failed outcome of ecotourism initiatives (Drumm & Moore, 2002).

To get a better understanding of the typical ecotourist, The International Ecotourism Society constructed an ecotourist market profile in 1998 based on a survey of North American travelers which can be found in Appendix V. Neil & Wearing (1999) proposed a similar version of the ecotourist’s demographic characteristics, seen in Figure 5 Balantine and Eagles (1994) rather focused on the ecotourist’s psychographic characteristics which include possession of an environmental ethic, willingness not to degrade the resource, focus on intrinsic rather than extrinsic motivation, biocentric rather than anthropocentric in orientation, aiming to benefit wildlife and the environment, striving for firsthand experience with the natural environment, possessing an

expectation of education and appreciation and high cognitive and affective dimensions (cited by Neil & Wearing, 1999).

<i>Age</i>	<i>Income</i>	<i>Education</i>	<i>Gender</i>	<i>Country of origin</i>
20–40 or 55 +	\$37 000–\$60 000	Generally possessing tertiary qualifications	Roughly equally divided between sexes	United States, Canada, Germany, Sweden, Australia

Figure 5. Ecotourist profile according to Neil & Wearing (1999)

This two-decade old profile is still used as the reference in the literature due to the fickle nature of ecotourism as an industry and the many overlaps with nature-based travel. Unfortunately, the same factors affect the availability of ecotourism data rendering difficult the search for accurate and recent facts and figures (Center for Responsible Travel, 2017).

1.4.3 Global and National Councils

The roles and relationships of the ecotourism industry stakeholders are varied and complex. To ease exchanges between these parties several initiatives in the form of councils have developed in recent years.

At a national level, the National Ecotourism Councils' (NEC) objective is to develop an appropriate national ecotourism strategy. These councils have already proved their worth in some developing countries, such as countries in Central America, where NECs have been established in almost all countries in the region. The councils are formed by representatives of the public sector, the private sector, NGOs active in ecological tourism and, in some cases, financial institutions and local government representatives (Ceballos-Lascurain, 1993). *“Regional ecotourism planning in the sense of including several countries is often called for. Regional planning of tourism is also required since natural ecosystems do not respect political boundaries. Also, migrating wildlife know nothing of political borders, and they constitute prime ecotourism material.”* (UNESCO, 2010)

Furthermore, the council with the largest scale is undeniably the Global Sustainable Tourism Council (GSTC). This global initiative aims at promoting sustainable tourism practices around the world. It counts 23 criteria such as supporting natural and cultural resources, maximizing social and economic benefits for the local community and minimizing negative

impacts on the environment. These criteria are followed by its members being, for example, the UN, tourist offices and tour operators around the world (GSTC, 2019).

The GSTC72 is the product of a 2007 partnership between the Rainforest Alliance, the United Nations Environment Programme (UNEP), the United Nations Foundation and the United Nations World Tourism Organization (UNWTO). In total, there are 32 organizations worldwide that are “working together to foster increased understanding of sustainable tourism practises and the adoption of universal sustainable tourism practises” (GSTC, 2019). The criteria are a response to the United Nations Millennium Development Goals by tourism stakeholders.

The main criteria address issues such as poverty reduction and environmental sustainability, including climate change. The goals of this initiative are mainly: “Clearly define sustainable tourism using the criteria as the framework, build consumer confidence, promote efficiency and fight green-washing” (GSTC, 2019).

To develop the criteria, the partnership examined more than 60 sets of certification criteria already implemented worldwide. The partnership emphasizes the participation of all stakeholders in the tourism value chain. The intended uses of the criteria are diverse. Indeed, they can serve as a guide for travel agencies in the choice of suppliers or help consumers identify healthy sustainable tourism programs or assist in certification, etc. Nevertheless, the criteria indicate what needs to be done, not how to do it or whether the objective has been achieved (GSTC, 2019).

Conclusion

The origins and emergence of the ecotourism concept are traced to the second half of the 20th century amongst rising environmental movements. The existing literature helped to map ecotourism against other types of tourism which led to three pillars of ecotourism: nature based, environmentally educated and sustainably managed. The importance of the tourism industry for the global economy was then explored followed by its current trends, including sustainable tourism, the limitations of the tourism industry and how ecotourism could resolve them. In order for ecotourism to be successful, all the involved parties should form strong partnerships. Drumm & Moore’s (2002) model of principle ecotourism stakeholders was then used to explore the different roles and responsibilities of the core and supporting players.

Chapter 2. Ecotourism Best Practices

This chapter explores best ecotourism practices based on the foundations of ecotourism presented by Dehoorne, Furt and Tafani in 2011; Nature and culture, the Well-being of host communities, Responsible tourists, Participation of host communities and Sustainability. Practical examples of recognized ecotourism establishments around the world will illustrate the best possible scenario for each of these foundational pillars. The aim of this chapter is to present tangible ways currently implemented to reach ecotourism objectives of economic presentation and social well-being of host communities while contributing to the preservation of the environment.

The following successful establishments have been designated as best practices by the Global Ecotourism Network (GEN) and are represented in Figure 6 The selection was made based on their experts' knowledgeable opinion and on-site visits by specialists (Global Ecotourism Network, 2019b).



**Figure 6. Best practice establishments around the world selected by the GEN
(Global Ecotourism Network, 2019b)**

2.1 Nature and Culture

The valorization and conservation of natural and cultural heritage of a region is a crucial aspect of ecotourism principles and is absolutely necessary for the establishments relying on those resources. Ziffer (1989) had already underlined the dependence of this type of tourism on the region's natural heritage including its indigenous cultures (cited by Dehoorne et al., 2011). Along

with ecological endeavours, ecotourism establishments typically immerse themselves in the local culture on which the intensity of their offer deeply relies.

In the effort of environmental conservation, both natural and cultural, several African ecolodges have been quite successful in conserving and even boosting natural biomes in their region. Africa is actually the primary continent where humans live side by side with megafauna. These unique, large and magnetic animals are part of the 1111 mammal species that live on the African continent and for whom ecotourism serves (Damaraland, 2019). Damaraland Camp and Il Ngwesi Lodge are two spearheads for natural conservation in Africa and dedicate a share of their revenue to the protection of neighbouring natural habitats and species relocation programmes, amongst others. More than 8,500 hectares of Il Ngwesi land in North Kenya was designated as a conservation area and has witnessed an incredible recovery of the natural biomes. This effort has brought back several endangered species to their land such as the white rhino, lion and Grévy zebra (Il Ngwesi, 2019). Likewise, Damaraland Camp in Namibia holds conservation at its core. This camp was created with the partnership between a tourism company, Wilderness Safaris, and the Torra Conservancy community-led management body with the idea of using high-end tourism to conserve and restore Africa's wilderness and wildlife. They manage to protect over 2.5 million hectares counting eight biomes, over 1000 bird, 250 mammal, 200 reptile and 50 amphibian species including 33 IUCN red list species.

One of their top initiatives is the Botswana Rhino Conservation project which successfully relocated 1% of Africa's total population of White Rhinos by 2015 (Damaraland, 2019). Such collaborations can also be found in other continents like the Kenai Fjords Glacier lodge in Alaska which resulted from a collaborative agreement between Alaska Wildland Adventures and Port Graham Corporation. Together, these two bodies work towards the protection of "the rich ecological values of the area through cooperative management of national park and corporation lands." (KFGL, 2019) When it comes to preserving cultural heritage, Chalalan Ecolodge also participates in protecting and instilling knowledge about the numerous Inca and Mollo archeological sites and pre-Columbian paths of the Madidi National Park in Bolivia (Chalalan, 2019).

To support these actions, the establishments can only accommodate limited groups at a time and offer low impact activities and lodging. In other words, the overconsumption of natural resources is avoided at all costs. At Il Ngwesi, for instance, a maximum of 24 guests are lodged in a building seamlessly inviting nature in and built in line with traditional techniques, as can be seen

in Figure 7 They can choose between honey collecting and learning more about traditional hunting techniques as a way to boost understanding of local culture without disrupting it. They even propose community projects such as learning about beading techniques by spending time with local women or visiting local health clinics (Il Ngwesi, 2019). These respectful and even helpful meetings will be further explored in the next section. In the same vein, Damaraland Camp offers a variety of eco-friendly activities such as rock art excursions and guided nature walks to allow their visitors to engage with the local community and learn about the heritage of the Nama-Damara people (Damaraland, 2019).



Figure 7. Il Ngwesi Ecolodge (Il Ngwesi, 2019)

It goes without saying that these establishments pay particular attention to the origin of all served food and beverages. Moreover, essential environmental matters such as water, energy and waste management will be touched upon in the last section of this chapter on Sustainability.

In conclusion, ecotourism establishments all over the world support environmental preservation, natural and cultural, and immerse themselves in the host communities in order to have a low impact on both of them (Dehoorne et al., 2011).

2.2 The Well-being of Host Communities

The well-being of host communities is the second pillar of ecotourism designated by Dehoorne et al (2011). It englobes the general improvement of the living conditions of local populations and diversification of their economic activities. For instance, on top of restoring natural areas for wildlife conservation, ecotourism companies can redistribute a portion of the profits towards education. It is the case for Camp Minjerribah in Australia which supports the research of

local students and, through this research, is committed to maintaining and restoring wildlife habitats in the future (Minjerribah Camping, 2019).

Il Ngwesi Lodge also directly impacts the North Kenyan populations by supporting their education, health and livelihood projects. Since 1995, the Lodge has been reinjecting revenues to secondary school and university fees as well as updating school infrastructures and helping residents to purchase land to alleviate grazing pressures for all six neighbouring Maasai villages (Il Ngwesi, 2019). Similarly, Wilderness Safaris, the owners of Damaraland Camp and other ecotourism venues in Africa, have implemented an environmental and life skills educational program which aims at inspiring children to care for their natural heritage and to one day become the custodians of these lands. They have set up rural eco-clubs that engage with over 2500 learners per year. Moreover, Wilderness Safaris has also set up scholarship programmes which pay for 300 children's school fees per year (Damaraland, 2019).

When it comes to diversifying the local economic activities, ecotourism establishments can provide employment and business opportunities adjoined to their tourism activity. Dehoorne et al. (2011) are adamant that the implication of host societies in diverse services and animations favor a better flow of revenue. As mentioned above, Il Ngwesi Lodge has established a partnership with VSO Jitolee, funded by the European Commission to empower Kenyan women and provide them with the opportunity to own their small business and valorize their traditional artisanship of beading. They have now set up a shop at the Lodge and sell to nearby and national markets (Il Ngwesi, 2019).

Taking a closer look at the isolated region of the Achuar Amazon rainforest as seen in Figure 8, its location makes developing environmentally and culturally responsible economic activities quite challenging. A private and indigenous partnership resulting in the Kapawi Ecolodge & Reserve helps the Achuar in seizing their region's key attributes to generate local employment, participation and ownership while perpetuating their cultural values and heritage (Kapawi, 2018).

A third and final example of the positive impact of economic diversification is the authentic experience with shepherds offered by the Feynan Ecolodge in Jordan. Clients can spend a full day with local shepherds to get to know the ancient Bedouin culture. The length of the excursion is completely adapted to the shepherd's schedule and they are directly remunerated for their service (Ecohotels, 2019).



Figure 8. Achuar Territory in Ecuador (Adapted by authors from Trek Ecuador, 2019)

These examples illustrate the positive impacts ecotourism activities can have on the local communities. From their living conditions to diversifying their revenue sources, ecotourism has the potential to influence local living conditions. The benefits of such activities are of course heightened when developed in partnership with local communities as discussed further on in this chapter.

2.3 Responsible Tourists

The protection of nature and local culture does not depend exclusively on the private ecotourism service providers. Indeed, tourists themselves play a major role in the logic of such hotels. If visitors do not respect some predefined rules, the sustainability of the project could be jeopardized. Some establishments therefore suggest their customers to follow a guide in order to remain in accordance with the ecotourism values of the place in which these people have the chance to stay.

In an effort to educate clients to be more environmentally conscious, Feynan Ecolodge, encourages tourists to minimize their carbon footprint. They suggest different ways of doing that, such as using local food instead of imported products as much as possible or reduce the amount of water used in the shower or participate in the recycling and composting program by placing recyclable materials in appropriate bins, etc. It also provides advice on how to engage with local

communities. To benefit from the experience and create a healthy engagement with local communities, tourists are encouraged to follow certain rules. An important point on which many actors in the sector insist on is begging. Indeed, tourists are often confronted with extreme cases of poverty. Nevertheless, giving money or gifts only encourages begging. It is therefore recommended to transfer donations to an existing NGO that knows the real needs of the community and implements sustainable development programs (Ecohotels, 2019).

Another solution for tourists to participate in the sustainable development of the region is to use a local guide. Indeed, these people will provide them with authentic information and will be able to share their knowledge about the region. The Chalalan Lodge offers this type of service. The guides are bilingual indigenous people from the community of San José de Uchupiamonas who interpret the forest based on their traditional knowledge and integrate scientific knowledge into their descriptions and explanations (Chalalan, 2019).

In conclusion, making tourists more than just spectators but real informed actors are one of the objectives of ecotourism and the model establishments presented above are the proof of this.

2.4 Participation of Host Communities

One of the pillars of ecotourism is the participation of host communities. As Linden Tree Retreat & Ranch puts it, “As nodes in the web, these changes only have a strong impact when they are connected. Such are collaborations with our private and public partners and friends with whom our team works on various projects” (Yerkovich, 2019). Such collaboration, when done right, is beneficial for all parties and can be achieved in different ways.

The first possible type of contribution relates to the purchase of raw materials. In order to limit the impact on the environment and to include local communities, ecotourism accommodations source as much as possible from suppliers of the region like at the Coconut Lagoon in India. Feynan Ecolodge, for example, relies mainly on local businesses and nearby farms for its supplies. The bread is baked daily by a Bedouin mother from the local community on a traditional oven. This type of initiative is part of the hotel's commitment to sustainable development (Ecohotels, 2019).

Another possibility to involve host communities in the ecotourism project is to employ local residents within the hotel. This is what the Linden Tree Retreat and Ranch is currently engaged in in Croatia. (Yerkovich, 2019). Camp Damaraland even indicates that more than 85% of the camp's staff are from the region's rural communities. In addition, this is the very first formal employment

for 63% of them. The consequences of these jobs are important and quantifiable. Indeed, because of their employment, each camp staff member directly supports seven other people. In addition, by including local suppliers, revenue sharing and additional services, each lodge bed indirectly affects no less than 14 people (Damaraland, 2019).

Other types of collaboration target the general living conditions of local residents. For instance, Il Ngwesi Lodge has set up the 'Days for Girls' programme in partnership with the Kenya Health Care Initiative to produce sanitary packs. Their aim is to ensure girls can attend school at all times and empowering women with an income by training them to make and sell the packs (Il Ngwesi, 2019).

Finally, Cree Village truly embodies the ultimate participation model as the eco-lodge was created with the local community of Moose Factory in Ontario. In 1996, this community set out on this ecotourism project to boost indigenous tourism in their region. Their late chief, Randy Kapashesit guided the development working closely with the lead consultants from MacLeod Farley & Associates. He reviewed everything from the design process to the business plan to ensure every detail was in line with their environmental and cultural values, providing a great illustration of a true collaboration (Cree Village Ecolodge, 2018).

These different examples demonstrated that it is possible to involve the communities living in the region in such a way that this partnership is beneficial for both parties. Nevertheless, in order to be comprehensive, these partnerships must be carried out in a way that respect the local environment and are sustainable. Ultimately, any ecotourism initiative should plan for local communities to redeem their share of the gains. It is also in every party's interest to consult locals on what nature and level of tourism activity they consider fit for their environment. Ceballos-Lascurain (1996) concludes by stating "If their involvement is not sought, ecotourism will certainly not be possible."

2.5 Sustainability

The creation of ecotourism accommodation is a multi-faceted project that requires prior consideration of many aspects. One of these aspects is the sustainability of the project. Indeed, in the assembled literature, every author acknowledges that having a neutral environmental impact (or as small as possible) is a dominant objective of ecotourism. At Damaraland Camp in Namibia, although the camps are luxurious, they are designed to have the least possible impact on the environment. This means that if they have to be moved, no trace of their presence can be observed

(Damaraland, 2019). As it can be observed on Figure 9, The Kenai Fjord Glacier Ecolodge in the United States has adopted a similar approach. It is therefore interesting to observe that such an approach is possible even in less hospitable areas such as the Namibian desert or the American glaciers (KFGL, 2019).



Figure 9. Example of a room at The Kenai Fjord Glacier Ecolodge (KFGL, 2019)

In order to achieve these objectives of neutral environmental impact, some sites have implemented different practices. Many hotels take advantage of the sun's energy to supply their own electricity. For example, twelve of the thirty-seven Wilderness Safaris camps are 100% solar. The rest use hybrid solar energy systems combined with other energy systems. Thanks to this, the Wilderness Safaris camps save nearly 2,500 tonnes of carbon per year. They therefore contribute to ensuring that the planet's ability to “reabsorb carbon is not reduced and that the photosynthetic processes that occur in these wilderness areas are not interrupted” (Damaraland, 2019).

To no longer depend on fossil fuels, solar power is not the only solution. Hydraulic forces can also be a great asset which the Glacier Lodge took advantage of by building a hydroelectric system which uses the energy of a nearby creek. “The water from the creek moves through a series of pipes and through a turbine to eventually charge the lodge's battery bank. [...] The energy stored in the battery bank runs all lights and water in the kitchen, main lodge, and bathhouse as well as lodge laundry facilities” (KFGL, 2019).

However, using hydraulic-based systems is not possible in every country. Indeed, water is omnipresent in Alaska but it is a scarce commodity in some regions. Most ecotourist accommodations suffering from this problem have therefore adopted water management systems. For example, Minjerribah Camping in Australia has a comprehensive water management system. This includes showers equipped with water-saving shower heads and hot water distributed by a

timer mechanism restricts hot showers of up to 5 minutes in duration (Minjerribah Camping, 2019). Another example is the Chalalan Ecolodge in Bolivia. At this place, they purify the water with special filters. This water is then boiled and stored in closed containers for later use in the preparation of beverages and food (Chalalan, 2019).

Another method of limiting environmental impact is sustainable waste management. Chalalan Ecolodge provides a great model of inspiration in this regard. They have implemented a dual waste management system. Indeed, there is a liquid waste treatment system certified by the Bolivian Ministry of Sustainable Development and the Environmental Manifesto (Chalalan, 2019). And there is also a system for the treatment of solid waste divided into organic and inorganic waste. Another excellent example is the Coconut Lagoon in India. At this location, they transform their wet waste into biogas and vermicompost for use as fuel and manure. Dry waste is also reused such as plastic bottles which were sourced, for example, to build an attractive interim building (CGH Earth, 2019).



Figure 10. Example of a room of the Chalalan Ecolodge (Chalalan, 2019)

Finally, the use of local resources and the use of traditional methods in the construction of a building are also a factor of sustainability, as Kawapi Ecolodge has well understood. Indeed, local building materials are used to preserve the Achuar style. In addition, since 1996, community enterprises have been created to ensure that local materials, such as roofing leaves, are farmed in local communities to reduce the pressure on the forest's natural resources (Kapawi, 2018). At Chalalan Ecolodge, it was the local Uchupiamonas who planned the design and layout of the various rooms down to the last detail. Indeed, by being native to the area, they have been able to take full advantage of their knowledge of the jungle's resources. As it can be observed on Figure

10, the walls are made of Copa palm and covered with matting, the roofs are woven with Asaí palm leaves and the floors are made of fine hardwood (Chalalan, 2019).

Conclusion

To sum up, Figure 11 presents a table synthesizing all the selected establishment's endeavours in the five different categories. It can be observed that, although being best practices, the establishments do not appear to meet all the criteria. Since these establishments are considered as examples to follow, the category concerning awards and citations in the press is, as expected, the most represented. The Participation of host communities is the second most represented category with six out of ten accommodations. Half of them emphasize the Well-being of host communities and Sustainability. Only a minority take into consideration Nature & Culture as well as Responsible tourists. Finally, only Camp Minjerribah owns an official label.

Establishments	Ecotourism Foundations					Honors	
	Nature & Culture	Well-being of host communities	Responsible tourists	Participation of host communities	Sustainability	Labels	Awards/ Press Citations
Il Ngwesi	X	X		X			X
Damaraland Camp	X	X		X	X		X
Coconut Lagoon				X			X
Camp Minjerribah		X			X	X	X
Linden Tree Retreat				X			X
Kapawi Ecolodge		X			X		X
Fenyan Ecolodge		X	X	X			X
Cree Village Ecolodge				X			
Kenai Fjords Glacier	X				X		
Chalalan Ecolodge	X		X		X		X

Figure 11. Synthesis of ecotourism best practices

In conclusion, these examples were presented to illustrate best-of-class practices in the ecotourism sector. The objective is to have a base of reference to develop an analysis grid for the second part of this thesis. Nevertheless, in order to create this grid, it seems important to focus on another theoretical aspect: the creation of a competitive advantage.

Chapter 3. The Creation of a Competitive Advantage

This chapter focuses on the notion of creating a competitive advantage. It begins with the notion of strategy and a brief synthesis of the concept's evolution. The notion of competitive advantage will be then addressed through Porter's value chain and generic strategies as well as Bowman's strategic clock. The literature review will end with a discussion on key success factors and establishing them for ecotourism accommodation services.

3.1 The Concept of Strategy

It is important to note that no definition of "strategy" is universally recognized and the notion of strategy has evolved over time in the literature. Strategic thinking has been traced back to Antiquity where it was particularly used in the military field. Etymologically, the word "strategy" comes from the Greek "*stratos*" meaning "army" and "*agos*" meaning "I drive". Strategy therefore represents the art of leading armies in times of war, but also in times of peace (Siegel, 2008). The business usage of strategy was first used in 1946 by Von Neumann and Morgenstern in their famous theory of games. As a consequence, the concept of strategy began to be increasingly used in business literature to this day (Ansoff, 1965).

During the sixties, the SWOT model was introduced by Humphrey and became rapidly considered as the basis for all strategic decisions for several decades. The SWOT model makes it possible to question the opportunities and threats of the environment, and then position a company in terms of its strengths and weaknesses (Saias & Metais, 2001). Like any other tool, the SWOT matrix, depicted in Figure 12, has advantages and disadvantages. Indeed, it allows to link internal and external elements within the same analysis. It also allows a quick visual representation of a strategy. Nevertheless, it is often carried out subjectively and weaknesses may therefore be underestimated, underlining the necessity to pair it with other strategy analysis tools.

A few years later, Ansoff proposed a model of similar inspiration but with a more elaborate architecture. The objective of the Ansoff Matrix is to classify and explain the different growth strategies for a company. In his book, Ansoff offers a definition of strategy as a "rule for decision under partial ignorance" (Ansoff, 1965). The advantage of this very visual matrix, depicted in Figure 13, is its effectiveness in internal communication. Nevertheless, the author discourages its use without market analysis (Ansoff, 1965).

	Helpful	Harmful
Internal	STRENGTHS	WEAKNESSES
External	OPPORTUNITIES	THREATS

Figure 12. The SWOT matrix (Saia & Metais, 2001)

		Products & Services	
		Existing	New
Markets	New	Market Development	Diversification
	Existing	Market Penetration	Product Development

Figure 13. The Ansoff matrix (Ansoff, 1965)

During the 1980s, Michael Porter reached a new milestone in corporate strategy. He transposed some principles of industrial economics to the world of business management. Porter (1985) defines the corporate strategy as “the art of building sustainable competitive advantages”. In 1996, in the article “What is Strategy”, Porter explains that “the essence of strategy is in the activities - choosing to perform different activities than rivals”. Therefore, “Strategy is the creation of a unique and valuable position, involving a set of activities (Porter, 1985).

In order to create this unique and valuable position, Porter (1980) introduced the concept of *Competitive Strategy*. According to this author, “Competitive Strategy aims to establish a profitable and sustainable position against the forces that determine industry competition.” Indeed, according to Porter (1980), two fundamental questions guide the choice of competitive strategy. First, the attractiveness of the industry for a durable profitability and the determining factors. Second, the determining factors of relative competition within an industry. To answer the second question, Porter (1980) presents the concept *Competitive advantage* to understand the importance of the positioning of a company within its sector and its impact on its profitability.

3.2 Competitive Advantage

According to Porter (1985), “Competitive advantage grows fundamentally out of value a firm is able to create for its buyers that exceeds the firm’s cost of creating it. Value is what buyer are willing to pay, and superior value stems from offering lowers prices than competitors for equivalent benefits or providing unique benefits that more than offset a higher price.” (Porter, 1985)

It is therefore crucial for a company’s durability to identify its sources of competitive advantage. In order to identify them, Porter created a generic tool: "The Value Chain" applicable to any and all sector. For Porter (1985), “Differences amongst the value chains are a key source of competitive advantage.” Companies can thus model and visualise their distinct assets.

3.2.1 The Value Chain

The value chain, found in Figure 14, is a tool for analyzing activities that contribute to the creation of value for both the client and the firm. The purpose of this tool is consequently to identify the characteristics that enable a company to stand out in a market against its competitors. Any decision impacting the value chain can hence also impact a company's competitive advantage (Porter, 1985).

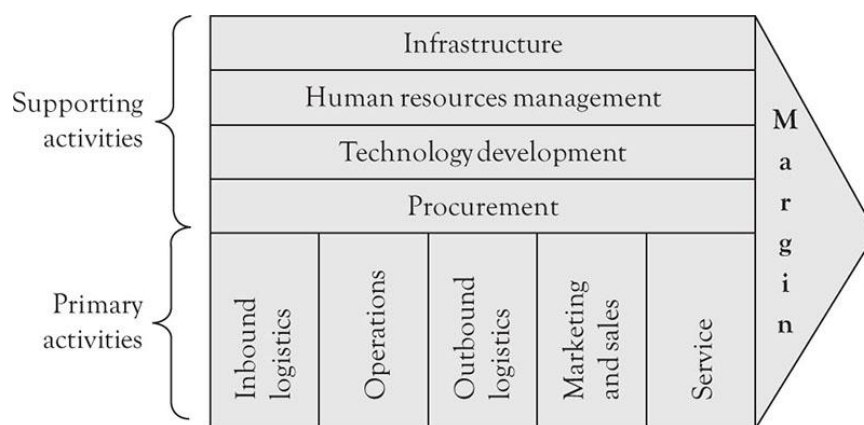


Figure 14. The value chain (Porter, 1985)

This general representation of the company is based on a process composed of a sequence of activities that transforms inputs into outputs then purchased by consumers. Value-creating activities are of two types: primary activities and support activities. The primary activities allow the creation of value directly for the client while the support activities allow a leverage effect in relation to the margin created by the other activities. In addition, the breakdown of this chain into two parts makes it possible to identify the cost or potential for differentiation of each activity.

Sources of competitive advantage that create value for the customer can be recognised thanks to this method along with the company margin based on a value/cost analysis (Porter, 1985).

According to Magretta (2011), visualising the company's value chain has at least two strategic consequences. First, a company's activities are no longer conceived solely as sources of costs, but also as steps that add value to the service or finished product. The second strategic consequence is looking beyond the boundaries of the company. In other words, it sets the company's activities as part of a broad value system in which other stakeholders participate.

In conclusion, the company's value chain is therefore the set of all its value-creating and cost-generating activities. Magretta (2011) states these activities are the basic units of competitive advantage. A competitive advantage is therefore different from the concept of beating your competitors. Indeed, it is a question of creating more value and widening the gap between costs and value in comparison with competitors. And in order to achieve this objective of sustainable competitive advantage, Porter suggests different strategies called "Generic competitive strategies" (Porter, 1985).

3.2.2 Generic Competitive Strategies

In addition to Porter, many authors have shown the validity of these strategies in different sectors regardless of the size of the companies studied. Thus, despite their longevity and some criticism, Porter's generic strategies remain a reference in the field (Baroto, Bin Abdullah & Wan, 2012).

Although one may have many strengths and weaknesses compared to their competitors, Porter (1985) explains that there are two types of competitive advantage that a company can have: low cost or differentiation. These two elements combined with the competitive scope that a company wishes to achieve lead to the three generic strategies that are:

- Cost leadership
- Differentiation
- Focus

		Competitive Advantage	
		Lower Cost	Differentiation
Competitive Scope	Broad Target	1. Cost Leadership	2. Differentiation
	Narrow Target	3a. Cost Focus	3b. Differentiation Focus

Figure 15. Generic competitive strategies (Porter, 1985)

As it can be observed on Figure 15, the focus strategy has two variants: *Cost Focus* and *Differentiation Focus*.

According to Porter (1985), the *Cost Leadership* strategy is probably the clearest of the three. Indeed, cost domination strategies are based mainly on economies of scale and learning curves. They determine all the company's efforts towards this objective, which is considered essential. They therefore consist in proposing an offer whose perceived value is comparable to that of competitors' offers, but at a lower price (Bchini, Hamdi & Hikkerova, 2016). It is through value chain assessment that it will be able to identify the costs linked to each activity and thus pinpoint those that create value. With lower costs, the firm obtains higher profits (Porter, 1986).

In a *Differentiation* strategy, a firm wants to be unconventional in its activity sector. It selects features perceived as valuable by customers in an industry (Porter, 1985). It therefore seeks to establish its competitive advantage over the specificity of its offer, which is recognized and valued by a sufficient part of the market (Bchini et al., 2016). The customer only pays for the perceived value of a product or service. He can even pay a premium for a product or service of lower value, if it is better signalled. The success of such a strategy therefore depends on a number of signalling criteria (advertising, notoriety) as well as those of use (value actually created: quality of the product, lead time...). Performance will be more sustainable if customers will constantly perceive the added value and that competitors will not be able to imitate it (Porter, 1986).

The third generic strategy is *Focus*. According to Porter (1985), “This strategy is quite different from the others because it rests on the choice of a narrow competitive scope within an industry”. The Focus strategy is the specialization of a firm around a target audience, a product or a well-defined market. This type of strategy is aimed at a specific target group (Bchini et al., 2016). In Cost Focus, companies pursue a cost advantage while in Differentiation Focus, companies want to be considered as different (Porter, 1985).

More recently, Cliff Bowman proposed to expand these three strategies by proposing eight strategies included in the "Bowman Strategic Clock". Thanks to Bowman's model, it is possible to build a "competitive environment" around 2 criteria: price and value perceived by the customer. By combining these two dimensions, six viable competitive strategies emerge around the reference offer, as shown in Figure 16. (Coeurderoy & Vas, 2019)

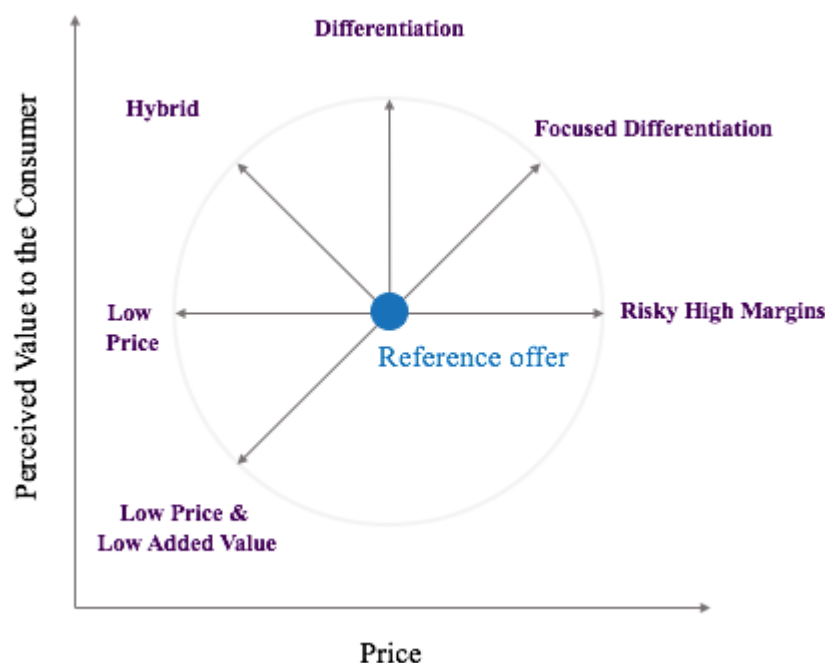


Figure 16. The Bowman Strategic Clock (Coeurderoy & Vas, 2019)

1. The low price, low added value strategy: It consists in targeting customers who are primarily price-sensitive during their purchases. The company therefore offers products with a value perceived by the customer that is lower than the reference offer but also at a lower price than the reference offer.

- 2. The low price strategy:** This strategy is based on a perfect control of its costs in order to set lower prices than the reference offer but at a identical perceived value to the reference offer.
- 3. The hybrid strategy:** It consists in reducing the price of a product while ensuring a perceived value that exceeds the reference offer. The customer considers that the quality/price ratio is more advantageous.
- 4. The differentiation strategy:** This strategy consists in distinguishing itself from the competition by offering a higher perceived value than the reference offer without increasing the price of the concerned product.
- 5. The focused differentiation strategy:** This is a type of differentiation coupled with overpricing. It will drive the offer upwards by offering a significantly higher perceived value than the reference offer. The raise in perceived value justifies a much higher price.
- 6. The risky high margins strategy:** This consists in offering a higher price than the reference offer for a lower perceived value. This strategy can only be effective in monopoly markets (Coeurderoy & Vas, 2019).

3.3 Defining the Key Success Factors of the Ecotourism Industry and its Sources of Competitive Advantage

Focussing back to the ecotourism industry and attempt to establish its key success factors. Hofer and Schendel (1978) pointed out that a firm has many resources. These can be financial, human, physical, technological or organizational for example. According to Daniel (1961), most industries contain between three and six key success factors. These factors should be at the center of business activity in order to achieve a level of success within the industry. It is therefore essential to understand the key success factors and their potential to create a competitive advantage in the ecotourism industry (Lee, San & Hsu, 2010).

For this reason, based on the Porter value chain and literature, the key success factors of the ecotourism sector have been identified. Indeed, this analysis is mainly based on two articles. The first article is by Lee, San and Hsu's published in 2010. It also uses the Porter chain to determine the key success factors for the industry. The authors identified the key success factors through an expert questionnaire survey and analyzed using the Fuzzy Delphi method. As a consequence, their study is able to present six key success factors related to development of competitive advantage in the ecotourism industry: firm infrastructure and management, product or technical development, human resources, local resources, marketing activities and service system and cultivation of tourists' understanding and behavior. The second article is that of authors Parker

and Khare (2005). They also defined the key success factors for the ecotourism sector, but based on a different methodology and classification. Their paper provides three major categories of critical success factors: environmental, community and economic success factors.

In order to develop a personal model of key success factors, a dual classification was adopted. Indeed, the identified success factors are classified according to Porter's value chain, i.e. primary and support activities, but also according to their environmental, social or economic aspect. The key success factors that have been defined and which will be developed in the following sections of this report are: Local resources, Quality, Marketing, Infrastructure, Human resources management & partnerships.

3.3.1 Primary Activities

A. Quality

Quality is an assessment of the consumer's perception of the service in relation to the quality of the process and the environment in which the service is delivered (Swaen, 2015). According to Hikkerova, Arlotto & Mutte (2011), it can be judged by the consumer during preparation or delivery but can also result from a comparison between his expectations and his perception of the service.

Ecotourists seek specific attributes in an ecotourism experience, such as wilderness, wildlife viewing and hiking (Dolnicar, Juvan & Yanamandram 2013). Biodiversity standards and the absence of human influences are essential to support a sustainable ecotourism project. Nevertheless, engaging in a remediation or environmental restoration program to rehabilitate a site will be costly and without any guarantee of success. However, if environmental opportunities for ecotourism are not present and sustainable, the company will not attract many ecotourists as they are seeking the quality described above (Lee et al., 2010).

B. Local Resources

According to Chen & Lin (2003), local resources include the diversity, the attraction and the experience degree of the resources in the region. Indeed, tourists take into account the diversity of landscape resources in their decision to choose a destination. In terms of “degree of experience with resources”, the authors propose strategies for integrating natural features in order to create an attractive environment. To address the issue of "resource attractiveness", the authors suggest the

integration of regional particularities with the tourist's profile. In order to compete, local services could be improved through alliances discussed in another section.

In addition, what lies outside the boundaries of the proposed ecotourism area may be of critical importance. Ecological areas are not isolated islands and need peripheral areas to thrive. In small sites, the natural passage of species is an added value for the long-term health of the area. Undeveloped land beyond the boundaries of the site, and in particular lands unsuitable for future development (swamps, ridges), are of interest (Parker & Khare, 2005).

C. Marketing

In the ecotourism sector, Duha (2004) believes that marketing can be considered as the main driver for the ecotourism boom. However, marketing can be a challenge because the industry is made up of many smallholders who rarely have the resources to market their products on a large scale. In addition, operators are generally located in remote locations and therefore do not have easy access to the necessary marketing skills and resources (Tsipidis, 2009).

Moreover, the public is often suspicious of places they do not know, and will orient their destination choices according to the overall environmental image and reputation. (Carvajal, 2013). Therefore, tourists are often attracted by offers in natural places. Some do offer real ecotourism experiences but some only offer "greenwashing" experiences (Duha, 2004). In other words, "tourists go on vacation, enjoy their time and return home with the idea that they have helped the environment, when actually they did not" (Carvajal, 2013).

For marketing to hold as a key success factor, online advertizing could be used. Online presence is indeed key in this sector. The OECD has even observed the trend of enabling technologies in the tourism sector. This includes the possibilities related to digitization and in particular creative and targeted communication (OECD, 2018). In addition, to prevent this "greenwashing" phenomenon from flourishing, tourist guides should effectively present the ecology of the environment. This type of marketing should also "positively influence tourists' attitudes and behavior concerning local residents, culture and the natural environment. As a consequence, the overall environment image and reputation of this type of tourist destination will be enhanced" (Parker & Khare, 2005)

Labels play an important role in the image and reputation of an establishment. Indeed, a label represents an additional source of information on products and services, a source that may be more credible than the product's brand alone (Larceneux, 2003). Labels are therefore often used by tourism organizations for promotional purposes. Obtaining the label is indeed an opportunity to

use a name whose prestige extends to all members. As with products and services in general, these labels also reduce the perception of risk to consumers. Indeed, for the tourist, these labels make it possible to reduce the risk associated with his choice, a risk that can be perceived as very high given the intangibility represented by an unknown tourist destination. In addition, in the face of fierce competition, the label should reassure him that the destination chosen is recognized for its exceptional qualities and that this destination is worth a visit (Marcotte, Bourdeau & Leroux, 2011).

3.3.2 Support Activities

A. Infrastructure

Jovanovic & Ilic (2016) describe tourism infrastructure as “physical elements that are designed and erected to cater for visitors. [It] includes a large number of services, necessary to meet the needs of tourists and increase their satisfaction during their stay at the destination.” An international airport, a network of road arteries that can be used to take visitors from the airport to a nearby city and hospitals providing quality care are key infrastructure assets for the ecotourism firm (Parker & Khare, 2005). Therefore, the importance of tourism infrastructure is illustrated by the fact that it can contribute to increasing the efficiency of the production and distribution of tourism services. In particular, demand for infrastructure services in the fields of water supply, waste disposal, communications and electricity supply is increasing. Hence, tourism infrastructure is of particular importance for the long-term growth of tourism and the overall progress of tourism destinations around the world (Jovanovic & Ilic, 2016).

Ecotourism promoters have an advantage over conventional tourism in a country with poor infrastructure. Indeed, ecotourists are open to a certain level of discomfort in their attempt to reach the cultural and environmental heart of a region (Parker & Khare, 2005). However, “the ecotourism industry is similar to other enterprises that also require the construction of basic facilities to support the whole value chain.” (Lee et al., 2010).

B. Human Resources Management and Partnerships

Human resources have a direct impact on the quality and satisfaction of tourists because they contribute to a quality service. Arnett, Laverie & McLane (2002) consider contact staff as a significant resource in creating a competitive advantage for a firm. Human resources management therefore has an impact on a firm's service and primary activities of Porter's value chain. In *Beyond Fences: Seeking Social Sustainability in Conservation*, Kabraji (1997) states that “the success of

projects, institutions and complex development initiatives depends not so much on the quantum of human or financial resources available, but on their effective management.”

To be successful, an equitable commitment between the community and an entrepreneur would therefore have to be privileged rather than a simple agreement between an entrepreneur and a community or NGO. Indeed, a project of this type can succeed or fail depending on the relationship between an entrepreneur and a community. This type of partnership mitigates the majority of business risks related to potential conflicts with the community. If insufficient attention is given to stakeholder participation, the risks of conflict will arise and could have a significant impact on the successful running of the project (Parker & Khare, 2005).

All in all, these five key success factors relate to one or more pillars of ecotourism; Environmental, Social and Economic, as seen in Figure 17.



Figure 17. The Key Success Factors of Ecotourism

Conclusion of the Literature Review

By exploring the evolution and current state of the tourism industry, the literature review also revealed several of its limits. As a response to these limitations, certain authors, spearheaded by Hector Ceballos-Lascurain, have identified an emerging type of tourism: ecotourism. It can be defined as “*environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features - both past and present) that promotes conservation, has low visitor impact, and provides for beneficially active socio-economic involvement of local populations.*” (Ceballos-Lascurain, 2006) This definition includes the three pillars of ecotourism; environment, society and economic development.

The ecotourism industry is composed of five core stakeholders: site managers, local communities, the private tourism industry players, international and national governments and nongovernmental organisations, and three supporting players; diverse fund providers, the education sector and ecotourists themselves. To showcase the theoretical principles identified, several best practices were explored using different establishments around the world. The best practices can be regrouped into five areas of action based on the foundations of ecotourism: nature and culture, the well-being of host communities, responsible tourists, participation of host communities and sustainability.

In order to understand how an accommodation service could hold a competitive advantage in a theoretical ecotourism market, several theories of strategy were examined. The frameworks of the main authors in terms of strategy management and competitive advantage were analysed; including Porter’s value chain and theory of competitive strategies. Bowman elaborated the latter theory with his strategic clock framework. Having defined these theoretical elements, the identification of different key success factors of the ecotourism industry was facilitated. These include local resources, quality, marketing, infrastructure, human resources management & partnerships. An empirical analysis can now be conducted on a chosen sample territory to determine what are the competitive advantages of an ecotourism accommodation.

PART II: EMPIRICAL RESEARCH

The purpose of the empirical nature of this second part is to refine and extend previous studies on ecotourism accounted for in the literature. In this case, the identified theoretical key success factors of ecotourism will be scientifically verified in a practical context. The empirical research of this thesis is devoted to a particular territory: Wallonia which is the southern, french-speaking region of Belgium. The aim is first, to add on to the lean available data on Walloon ecotourism establishments and their level of involvement and second, to verify their key success factors against the theory.

This second half of the thesis will be divided into five chapters the first of which provides an introduction of tourism and ecotourism in the Belgian context and more particularly in the Walloon region. The objective of the second chapter is to describe the methodology used for the empirical research. The status report of ecotourism initiatives in Wallonia will be presented in the third chapter and the key success factor analysis will be presented in the fourth. The final chapter of this thesis will focus on the main insights from the empirical analyses and present future research leads.

Chapter 1. Tourism and Ecotourism in Belgium

The tourism industry is one of the largest industries in the world accounting for USD 1.6 trillion in worldwide exports in 2017 and around 1.3 billion international arrivals with a 378% growth between 1980 and 2017 according to the UNWTO. The tourism industry in Belgium is also consequent with just under 41 million overnight stays booked in 2018 following a growing curve of roughly 5% since 2016. About half of those overnight stays were booked at a hotel and around 15% at both vacation homes and holiday parks. These proportions have been relatively stable throughout the years (Statbel, 2018). Business tourism represents only 8% of the nights spent in Wallonia (CGT, 2017), while in Flanders this percentage reaches 24% of the nights (Toerisme Vlaanderen, 2018) and rises to 55% for Brussels (Visit.brussels, 2017).

When it comes to the nationality of the guests, a little more than half of them are Belgian with the other half from The Netherlands (13%), France (7%), Germany (6%), UK (5%), Spain (2%), USA (2%) and Italy (1%) as presented in Figure 18. The distribution of visitor's nationalities varies consequently according to the different touristic regions and communities of Belgium

(Statbel, 2017). Tourism is, therefore, a regionalised competence in the Belgian government split between Brussels-Capital, the Walloon Region and the Flemish Region (Brussels Parliament, 2019).

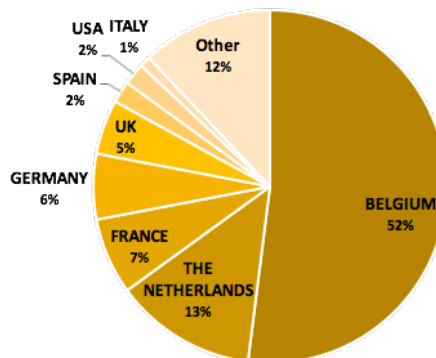


Figure 18. Country of origin of tourists in Belgium

Tourism in Belgium is quite dependent on culture, alike many North-Western European countries, as it “represents one of the most important attractions in the framework of tourism marketing policy” (Munsters, 1996). The historical consciousness of Belgians is thus a critical asset to Belgian tourism. Another important asset is the country’s natural resources and its endeavours toward a sustainable tourism offer. Belgium’s natural resources include its topography allowing for various cyclotourism possibilities and its generous natural environment that encourages a tourism of discovery of local producers and regional products (Spaey, 2017).

The 2016 Eurobarometer directed by the European Commission demonstrated that Belgians are considerably more mindful of the sustainable nature of their holidays compared to all other countries in Europe. As more than half of the country’s overnight stays are booked by domestic travelers, sustainable initiatives have been cropping up across the country to respond to the clients’ desires as well as the general green movement observed in the last few years. The study pinpointed four dimensions of sustainability for which Belgians were particularly attentive: the holiday destination’s practices (in terms of protection of natural and cultural resources and decreasing the activity’s environmental impact), the access to the holiday destination by a small impact transportation mode, the accommodations practices (in terms of energy consumption, water and waste management and use of fair trade produce) and finally, the certification by an ecolabel asserting their sustainable practices (Spaey, 2017). In this paper, only accommodation is considered excluding all analysis of transportation to the destination and other tourism activities.

When considering labels pertaining to sustainable practices and environmental protection in the context of tourism, over a hundred labels exist, all present at different extents around the world. The most relevant of which have been exposed in the first part of this paper. The objective of these programs is to put forth the establishments actively trying to reduce their environmental impact. In Belgium, the most present ecolabel is Green Key with over 250 certified locations. The EU Ecolabel counts only one certified hotel in Belgium, the Ecohotel Fevery in Bruges, compared to the 162 hotels in Italy and 91 in France (European Commission, 2017). Another program focused on supporting and stimulating ecotourism in the Ardennes area of the Walloon Region is Ardennes Ecotourism, which will be further described in Chapter 3.

Even though two thirds of Belgians, according to a 2017 TUI study, are prepared to be mindful of the environment when considering their tourism activities, only 10% actually do. As consumers need to be convinced to take the leap, a possible cause for this general reluctance can be the sheer number of labels on the market each with a meager certified base. This can only confuse an already poorly aware consumer of the existence and utility of such labels. Coupled with the lack of information in general and the perceived added price, consumers fall short of implementing their intentions when choosing their destination and accommodation (Theron, 2018).

Taking a closer look at *Flanders*, 30.8 million overnight stays were computed for 2017 half of which were in big cities like Brussels (6.3 million) or Bruges (2.0 million). For the last decade, overnight stays in Flanders have increased by 17.6%. In 2017, around 46% of tourists were domestic while most of international tourists came from The Netherlands (11%), followed by France (8%), Germany (7%), the UK (6%), Spain (3%) and finally the USA (3%) as depicted in Figure 19. More than half of all overnight tourists stay at a hotel. In 2016, the Flanders tourism sector counted around 250,000 jobs (Toerisme Vlaanderen, 2018) thus showcasing the uneven distribution of the tourism sector between both regions, with Flanders in the lead.

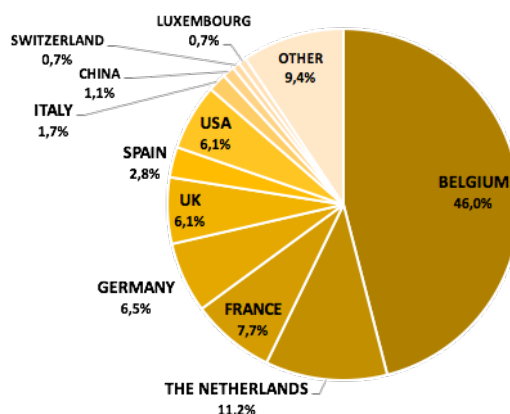


Figure 19. Country of origin of tourists in Flanders

Moving on to the south, *Wallonia* covers about 60% of the Belgian territory. This region is made up of 5 provinces: Brabant-Wallon, Hainaut, Liège, Luxembourg and Namur. In Wallonia, the tourism sector is rather developed for the size of its territory counting 60,000 direct unrelocatable jobs therefore contributing up to 6% to the Walloon GDP. The €2.8 billion of tourism expenses of 2017 are divided between 32% in accommodation, 33% in restauration, 23% in ⁶shopping and commerce, 5% in cultural activities, 4% in recreational activities and finally 3% in transport (CGT, 2017). When it comes to accommodation services, the region counts 457 hotels, 3,719 furnished holiday accommodations and 22 associations for social tourism, to name a few figures (European commission, 2016).

This region is qualified as Belgium's “green lung”. Indeed, it covers 80% of the Belgian forest domain, or 546,000 hectares including 221,000 of Natura 2000 zones. In general, tourism in the Walloon region can be defined as a tourism of nature and proximity (Spaey, 2017). Indeed, the brand image currently conveyed by the tourism officials is one that allies calm, nature and adventure (Theron, 2018). About half of the total number of visitors come for day trips followed by 35% who stay for two to three days resulting in more or less 8.6 million overnight stays every year. Second, it is qualified “of proximity” due to the neighbouring nature of the main source markets for tourists towards Wallonia. On the contrary to Flanders, Wallonia counts 58% of domestic travelers. However, The Netherlands is also in second place with 14%, followed by 9.6% of French, 4% of Germans and 3.7% of English tourists as displayed in Figure 20. (Spaey, 2017).

⁶ Coordinated network of protected areas in the EU that are “core breeding and resting sites for rare and threatened species, and some rare natural habitat types which are protected in their own right. It stretches across all 28 EU countries, both on land and at sea. The aim of the network is to ensure the long-term survival of Europe's most valuable and threatened species and habitats”, listed under official directives. (European Commission, 2019b)

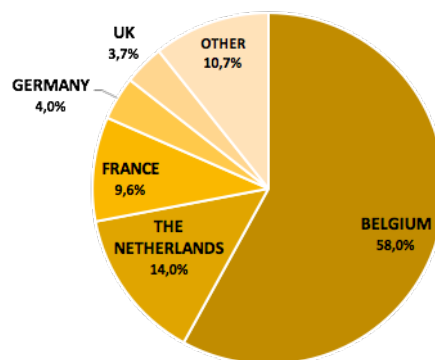


Figure 20. Country of origin of tourists in Wallonia

The three main reasons these tourists come to the south of Belgium have been studied by the Commissioner General to Tourism (CGT) of Wallonia. They are; the beauty of towns/villages, the proximity/accessibility and, its natural resources (Observatoire du Tourisme Wallon, 2015). It comes at no surprise that tourists are allured by villages as this study confirms the appeal of the historical and cultural heritage of Belgium and thus Wallonia. As 30% of foreigners already see Wallonia as a probable sustainable destination (de Beer de Laer, 2017), the public authorities have been evaluating the region's potential for sustainable tourism. Indeed, with its 52 Green Key certified tourism ventures and its 20000 ha of protected natural areas, Wallonia presents great opportunities for ecotourism. The following chapters will evaluate this potential by taking a "helicopter view" of the current ecotourism practices in Wallonia followed by a detailed case study of two beacons of ecotourism to attempt to define their competitive advantages.

Chapter 2: Methodology

2.1 Methodology for Chapter 3. Status

The third chapter of this report was written with the aim of giving the reader a general insight into the current state of ecotourism in Wallonia. One of the objectives of this chapter is to show the involvement of ecotourism accommodations in Wallonia in comparison with the best practices and literature examined in the theoretical part of this report.

2.1.1 Comparative Grid

To carry out this quantitative analysis, a comparative grid was selected to showcase the state of involvement of the chosen establishments. The sample of ecotourism establishments counts 72 in total including hotels, rental accommodations and bed & breakfasts. The different criteria on which the establishments are evaluated, are organized according to the three pillars of ecotourism: environmental, social and economic. Each establishment either respects that criteria, in which case the cell is annotated, or doesn't. The criteria included in the grid are based on the Green Key label certification criteria, which can be found in Appendix VI, and the Ardennes Ecotourism network criteria. All components were chosen to result in a pertinent and diversified grid in terms of themes which is adapted to any accommodation type situated in Belgium. The complete grid including every establishment's answers can be found in Appendix VII.

2.1.2 Information Sources

In order to compile this overview of ecotourism establishments in Wallonia, data was retrieved from two main sources. The first is the database of the *Club Ardennes Ecotourism*. The Club Ardennes Ecotourism includes members of the Ardennes Brand who are committed to developing and enhancing their approach to sustainable development. Their website holds a database of all the establishments in their network and their individual efforts. The second main source of information is the *Sustainable Tourism in Wallonia 2017* produced by the students in sustainable tourism of the Haute Ecole Robert Schuman. This guide includes accommodations, activities and restaurants that practice ecotourism. Only the accommodations were considered in the analysis. The guide also holds each establishment's initiatives in regard to the three pillars. Of all the establishments presented in these two information sources, 72 were selected to make up the final sample based on the availability of information and the author's subjective judgment.

Eight *interviews* were also conducted with owners of ecotourism establishments in Belgium in order to gain a more comprehensive view of the industry. Mainly, these interviews contributed to a greater understanding of the industry as a whole. Marie Spaey, coordinator of the Green Key program in Wallonia was also interviewed to gain more insight in the labelling process. Finally, Stéphanie Drothier, was interviewed to find out more about the Ardennes Ecotourisme network of which she is coordinator.

2.1.3 Limits of the quantitative analysis

The quantitative analysis carried out for the status report inevitably includes some limitations. First, the analysis is based mainly on generally self-reported secondary data. This implies a self-report bias as it is difficult to in control the validity of the available data and their adequacy for the intended use. Second, although the selected sample of establishments represent almost all the ecotourism initiatives in Wallonia, some establishments were kept out of the study. This decision fell under the subjective judgment of the authors on the insufficient involvement of the left-out establishments. Moreover, selected sample only includes establishments that are either part of the Ardennes Ecotourism network or Green Key labelled disregarding any independent establishment which may be involved in the ecotourism approach. Next, the number of studied cases varies amongst the provinces. Such ventures are more prolific in more adapted provinces than others. Then, even though all 45 criteria have the same weight of 1, some could be considered to require more involvement than others. Additionally, the information obtained on the Green Key label process comes mainly from the coordinator of the label in Wallonia, herself, which undeniably presents a sponsor bias.

2.2 Methodology for Chapter 4: Competitive Advantages of Ecotourism Establishments in Wallonia

2.2.1 Case studies

In contrast to the quantitative “helicopter view” provided in Chapter 3, the fourth chapter dives into two qualitative case studies. The practices of these two different establishments will be compared and contrasted with the five theoretical key success factors of ecotourism identified in the first part of this paper. The objective of this in-depth analysis is to bring forth the key success factors of an ecotourism establishment in a Walloon context.

2.2.2 Information sources

The bulk of the content found in Chapter 4 was collected through a qualitative primary research in the form of two semi-directive interviews. The interviews followed an open-ended questionnaire to avoid acquiescence bias from the participants. They also included closed questions to complete the comparative grid found in Chapter 3, if needed. The questionnaire was constructed around the three pillars: environmental, social and economic, to get more details and a better understanding of the two establishments' involvement.

The semi-directive interviews held correspond to De Ketele & Roegiers (2009) characteristics. These include a discussion segmented in different themes for which the order depended on the reactivity of the interviewee, though the general structure was predetermined; key points to touch on for which the collected information is of good quality and oriented towards the pursued objective; the duration of each owner's account was reasonable; and the inference was moderate. This method of interview was chosen as it allows to touch upon all the themes predefined by the literature review while leaving the liberty to the interviewee to bring forth complementary elements. The base questionnaire can be found in Appendix X followed by the summarized transcription of both interviews in Appendix XI.

2.2.3 Selection of the two cases

The two cases chosen for the in-depth analysis of a competitive advantage are the Utopia Hotel in Mons and the Grange d'Ychippe near Ciney in the Ardennes. The choice was based upon their best-of-class score in the comparison grid, indicating their high involvement in ecotourism. By taking a closer look at the websites of all the establishments standing out from the comparative grid, a number were selected to interview based on their number and scale of their initiatives. As previously mentioned, eight establishments were interviewed to gain a clearer understanding of the industry. These interviews confirmed the Utopia Hotel and the Grange d'Ychippe as the two establishments closest to the optimal ecotourism accommodation service in Wallonia. The summarized transcriptions of all quoted interviews can be found in Appendix XI.

2.2.4 Limits of the Analysis

The qualitative analysis of the two case studies equally presents some limitations. The first limit relates to the nature of the studied establishments. The comparison between the two cases is impeded by their difference in type. Another limit concerns the small scale of the Grange d'Ychippe. A larger establishment might have been able to provide information about carbon footprints, electricity consumption etc. In the same vein, a lack of economic information

concerning both cases were recognized, more particularly concerning the Grange d'Ychippe, due to its size and infrastructural connection to the owner's residence. Finally, the questionnaire and analyses were carefully considered, however a confirmation bias could be present in the interpretation of the data.

The objective of this chapter was to describe the chosen methodology for the empirical research. The limits and the information sources of the quantitative and qualitative studies have also been clarified. As previously outlined, the following chapter will consist in an overview of ecotourism establishments in Wallonia.

Chapter 3. Status Report of Ecotourism in Wallonia

In the literature review, the theoretical ideal for an ecotourism accommodation service was defined through definitions and best practices. One of the objectives of the empirical research is to outline the practical optimum in Wallonia. In order to do so, a grid of 45 criteria was curated as detailed in Chapter 2. The criteria detailed below stem mainly from the Green Key label and the Ardennes Ecotourism requirements and are classified under the three pillars of ecotourism: environment, social & economic.

Contributing to the preservation of the natural environment is, evidently, one of the main themes of the environmental pillar. The study also accounts for the more detailed water and energy consumption and waste disposal issues. Besides, the valorization of the cultural environment is considered in this pillar.

In general, social aspects of tourism include the respect of human rights and equal opportunity for all social groups. From a social standpoint, ecotourism should also adequately respond to the tourist's expectations and improve the working conditions of tourism actors while respecting the culture and way of life of local populations (Theron, 2018). In practice, this can be achieved by raising both the client and staff awareness, implementing measures to welcome all wishing to come and making sure the ecotourism activity does not interfere with local communities, all accounted for in the study.

The third pillar, which concerns economic development, underlines ecotourism businesses' capacity to incorporate their activities in the territory. This entails stimulating local affairs by favoring regional suppliers and creating local direct and indirect employment which are all considered as criteria.

If fulfilling the 45 criteria is considered as an optimal ecotourism involvement in Wallonia, the goal of this study is to quantify the chosen establishment's involvement on a scale of 1 to 45. As mentioned, the complete grid containing the detail of their answers can be found in Appendix VII. The main insights from this study are described below. Furthermore, this chapter continues by exploring the different labels and networks present in Wallonia, their role and impact on the ecotourism actors. Considering the practical observations from the grid, a commentary on the quality of their requirements and rating system will also be made.

3.1 Analysis Insights

This section covers the findings of the comparative analysis of 72 Walloon ecotourism accommodation services and their respective initiatives in the three pillars: environment, social and economic.

The studied sample of 72 establishments is composed of over half of rental accommodations followed by bed and breakfasts and finally hotels. The geographic distribution of accommodations per type can be found in Figure 21.

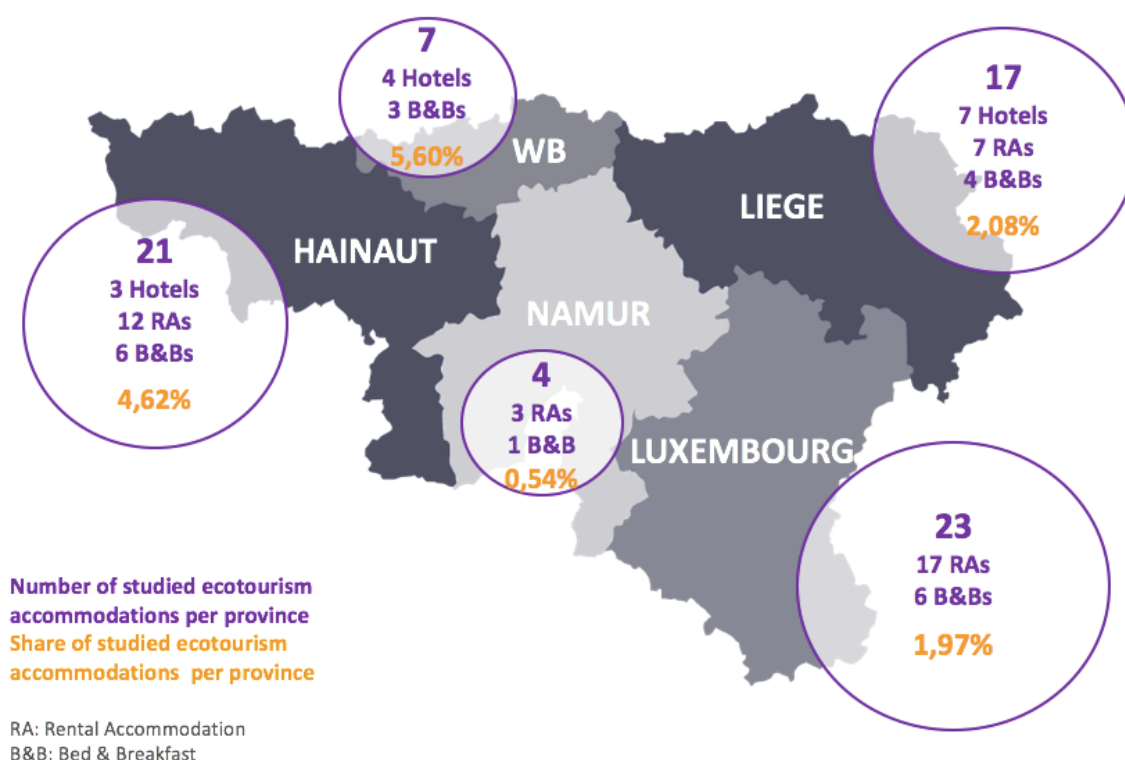


Figure 21. Geographic distribution of the 72 accommodations

Considering the average budget of 79€⁷ per night for an accommodation reservation in Wallonia, the average price for one night in an *ecotourism* hotel, B&B or rental accommodation is €37.05 per person. It is represented by the orange line in Figure 22 depicting the average prices per province for one night in an ecotourism accommodation, with Luxembourg being the cheapest at €29.17 per person for one night.

⁷ Budget average of French-(97€) and Dutch-speaking (81€) Belgians and Dutch (58€) tourists in Wallonia retrieved from a regional study (CGT, 2017).

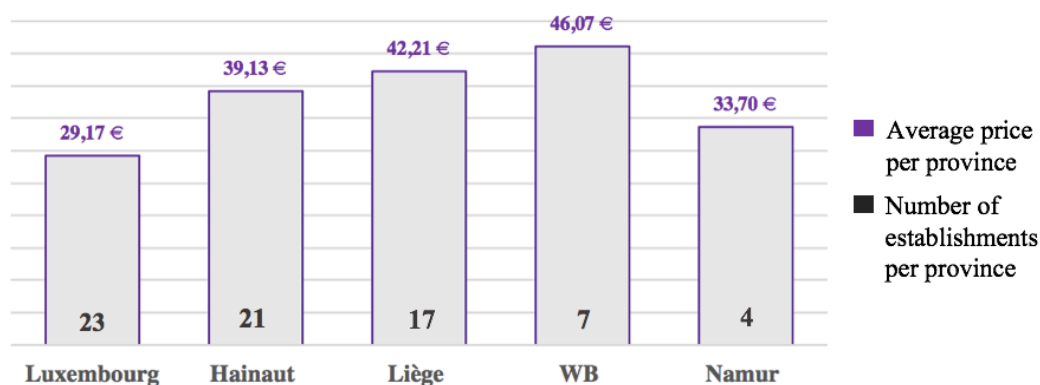


Figure 22. Average price for one night per province of Wallonia

Moving on to the professionals' endeavours in terms of ecotourism, the grid was constructed regrouping environmental, social and economic criteria, allowing to uncover which of the three pillars was most focused on. An additional criterion relates to the acceptance of EcoCheques. Figure 23 demonstrates the importance bestowed on each pillar by showing the average of fulfilled criteria per pillar. With 42% of the environmental criteria respected on average, this pillar is clearly the most considered by Walloon ecotourism professionals followed by the social pillar with 32% and leaving the economic pillar to last with 26% of criteria met in average.

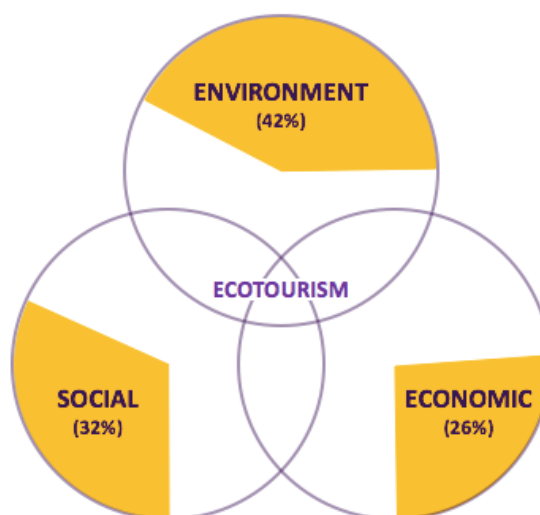
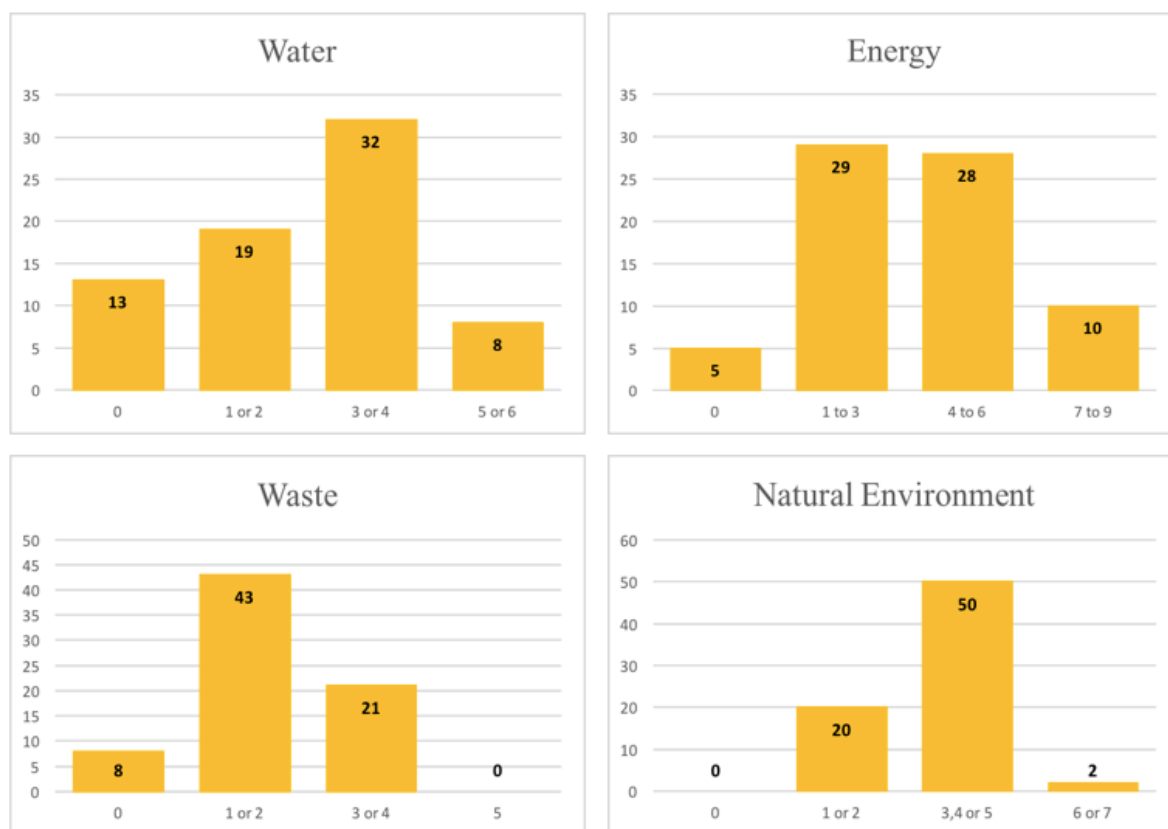


Figure 23. Average number of satisfied criteria per pillar

3.1.1. Environmental criteria

When taking a closer look at the 28 environmental criteria, the province with the best scores is Namur with 61% of the criteria met on average. The Walloon Brabant is the least advanced in the 28 criteria with only 28% of criteria met on average. The other three provinces of Luxembourg,

Liege and Hainaut all fall close to the general mean of 42%. The different categories of this pillar are water, energy, waste, natural environment and cultural environment. Figure 24 depicts the distribution of the number of establishments according to the number of criteria respected per category. Only one criterion pertains to the valorisation of the cultural environment for which only 13 establishments, most of which in Luxembourg, claim to fulfil.



Vertical axis : Number of establishments
Horizontal axis : Number of fulfilled criteria

Figure 24. Distribution of establishments according to the number of satisfied criteria for different categories of the environmental pillar

A seemingly efficient mean to assess ones' environmental impact could be to calculate the annual carbon footprint. However, it is not found as an important criterion of the labeling process nor was it easy to find establishments in Wallonia having done it during the primary research. The owner of the 'Loup qui Vit', a rental accommodation near Mons in the Hainaut province, was one of the few who had calculated and rendered null the impact of his property on the natural environment, including local fauna. As the owner of the Utopia Hotel mentioned during his interview, ordering a detailed annual carbon footprint analysis for his establishment located near

Mons is rather costly. In Flanders, on the other hand, a free option exists to self-assess one's building. Mr. Hasselman, manager of the Ecohotel Fevery in Bruges, uses a free webpage to enter his building's data, allowing all Flemish tourism services to be aware of their environmental impact if they so choose.

When aggregating all the environmental criteria into four degrees of implication, the final distribution curve could be associated to a Normal curve as depicted in Figure 25 implying a definite concern for this pillar in general and a clear margin for improvement for most owners.

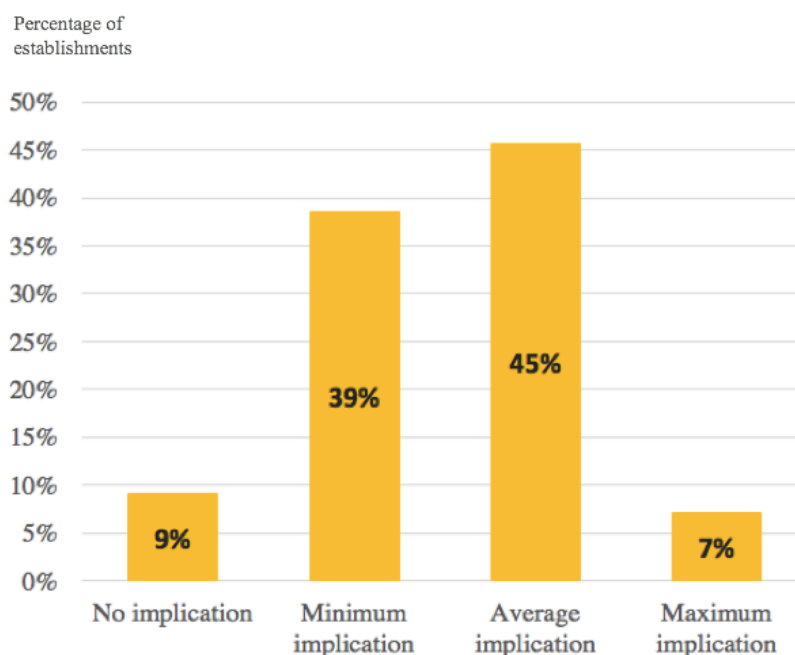


Figure 25. Aggregation of all answers for Environmental criteria

3.1.2 Social criteria

Secondly, the accommodations' involvement in the nine social criteria were examined revealing a general average of 32% of all criteria met. All provinces vary slightly from the average indicating a smaller standard deviation between them than for the environmental pillar. Figure 26 illustrates the number of establishments grouped according to the number of criteria they respected for two of the categories of this second pillar: Client awareness and Tourism for all (which includes accessibility criteria such as favourable pricing for families and access for disabled people). The third category is composed of one criteria that inquires if the personnel is made aware of the institution's approach to which only 19 of the 72 studied cases answered positively.

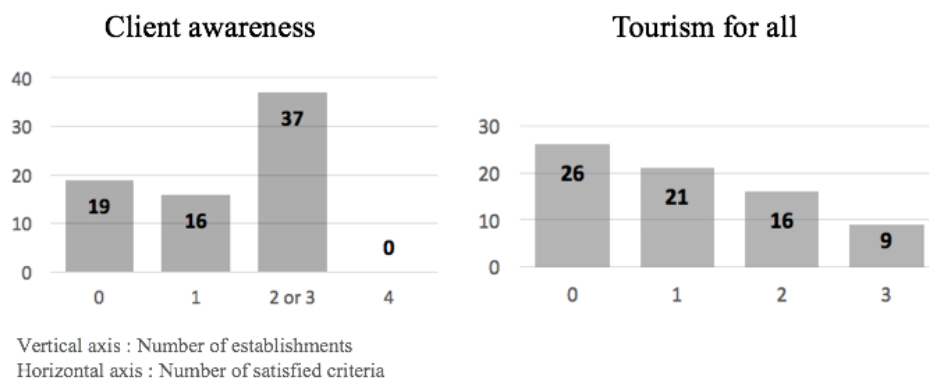


Figure 26. Distribution of establishments according to the number of satisfied criteria for different categories of the social pillar

The aggregation of all answers, as seen in Figure 27, for the social pillar shows a rather downward trend when it comes to the establishments' implication in social criteria with a clear possibility for improvement in terms of personnel awareness and accessibility.

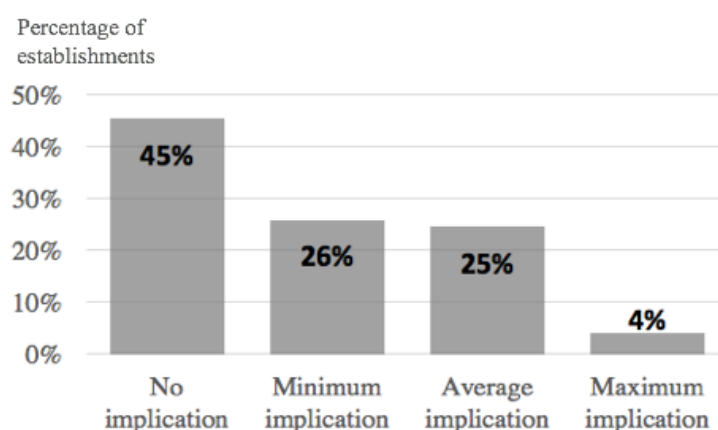


Figure 27. Distribution of establishments according to their implication in the social pillar

3.1.3 Economic criteria

Finally, the studied sample seemed to be the least involved in the seven remaining economic development criteria. Sourcing from local suppliers was one of the criteria categories and holds the highest fulfillment with 28% of owners fully committed to sourcing locally and 49% partly committed. Another point of interest in the study was the direct or indirect employment creation resulting from the activity. Only 12 out of the 72 owners have been able to create local employment from their touristic activity. This could be explained by the small scale of most establishments which do not require more full-time equivalents than the owner's themselves. This study does not

take into account the employment created indirectly in other local tourism businesses, i.e. restaurants, as a result from the activity of the studied ecotourism services.

Despite below average means in all three pillars, the analysis brought forward extremely involved cases, such as the Grange d'Ychippe (amongst rental accommodations) and the Utopia Hotel. The Grange d'Ychippe, located in the Ardennes of the Namur province, holds the best score of 30 out of 45 criteria met (including 20/28, 5/9 and 4/7 for the three pillars respectively, + 1 for accepting EcoCheques). The Utopia Hotel located near Mons in the Hainaut province achieved a global score of 25 out of 45 (14/28, 6/9 and 4/7, + 1 for accepting EcoCheques), the best out of the studied hotels. These results therefore contributed to their selection as case studies for the analysis of competitive advantage presented in the next chapter.

The next step of the analysis explored the differences between *price groups*. The establishments were divided into subgroups of 10 to 11, thus composing seven different price ranges: [€10-16], [€17-22], [€23-32], [€33-38], [€38-47], [€48-54] and [€55-100]. These prices represent the cost of a night for one person at one of the establishments. It goes without mentioning that the average price of one night is €49.27 for hotels, €40.60 for B&Bs and €31.40 for rental accommodations, roughly following regular market averages.

Figure 28 illustrates the mean of each price group's answers for all criteria (orange line), for the environmental criteria (yellow line), social criteria (grey line) and economic criteria (purple line).

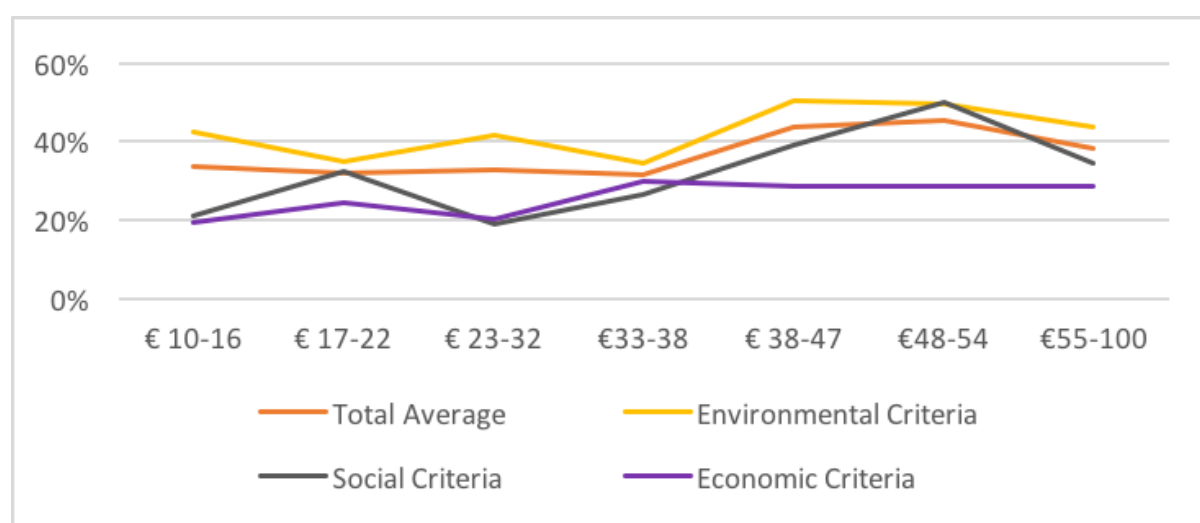


Figure 28. Percentage of criteria fulfillment by price range

It can be deduced that there is a general tendency of more involvement as the prices go up between €33 and €47 with most curves bottoming out towards the last subgroup. This indicates a finite linear curve between price and involvement, which limits continuous improvement past a certain price point. In other words, involvement is relatively dependent on an establishment's price point until roughly €51. It comes as no surprise as the two most involved such as the Grange d'Ychippe and the Utopia Hotel, are not amongst the priciest. The main insights of the status report can be found in the last chapter.

3.2 Ecotourism Labels & Networks in Wallonia

Out of the 72 establishments studied, 12 hold a Green Key label, six a Gite Panda label and only one holds an EcoGite accreditation. Considering the various efforts of all studied establishments, the sparse quantity of attributed labels brings forth the question of their adequacy and relevance. The following section will thus be devoted to the analysis of labels in Wallonia.

Labels are an essential element of any ecotourism service. Indeed, as all sustainable products and services, ecotourism accommodations must convince their customers of their low-impact values and labels are a means to do so. This section will explore and describe the different ecotourism labels present in Wallonia, the advantages such labels bring to the owners and customers of ecotourism accommodation services and discuss the notion of quality of these markers. Ecotourism networks are also an important stakeholder in Wallonia acting as catalysts and supporting ecotourism professionals in the region. The last part of this section will focus on these networks, their role and their importance for Walloon ecotourism actors.

3.2.1 Ecotourism Labels

As mentioned, labels are a certification by an external party granted to a product or, in this case, a service guaranteeing a certain quality or conformity to a list of criteria (Theron, 2018). In the context of tourism, ecolabels guarantee environmental actions are implemented by tourism stakeholders. The principal objective of such labels is the reduction of environmental impacts of ecotourism actors. This includes the whole tourism service from the design and construction of an establishment to its day-to-day management. For the purpose of this paper, only labels pertaining to accommodation will be considered.

In Wallonia, there exists a number of different ecotourism accommodation labels including Ecogites, Gite Panda and Green Key.

A. Ecogites

This label has been developed and awarded since 2009 by the *Gîtes de Wallonie* and *Nature & Progrès* and is dedicated to local tourist accommodations. The criteria are divided into eight categories: the accommodation environment, the materials used, water, electricity, heating, waste management, daily management and information for the guests. These criteria are strict enough to achieve real results. Nevertheless, this label is in decline in Wallonia and some actors cannot be labeled because they do not meet 100% of the requirements specification (Theron, 2018).

B. Gite Panda

Gite Panda is an international label created in 1993 for tourist accommodations. It ensures that the accommodation is located in or near a natural area and that it respects four fundamental pillars elaborated into 120 criteria. These pillars promote the protection of nature around the habitat, the use of healthy and natural materials in order to have an eco-habitat, eco-citizenship (including waste sorting, composting, etc.) and finally the awareness of customers about the protection of the environment (Theron, 2018).

C. Green Key

With 69 labelled establishments in Wallonia today compared to 51 in 2017, Green Key holds first place in terms of reach and renown (CGT, 2017). It is partly financed by the certified establishments' annual fee but mostly by regional subsidies.

In 2015, the Minister for Tourism, René Collin, supported the introduction of this label in Wallonia through a financial subsidy, thus making it possible to increase its promotion and to ensure adequate support for the candidates. Since then, the IEW (Inter Environnement Wallonia) has been responsible for the annual attribution of labels to Walloon candidates. The financial support of the Belgian government for this label was motivated by several factors including its international dimension. It can also be attributed to the flexibility of the global organization, adds Mrs. Spaey. In fact, the IEW is able to independently adapt certain criteria to the specificities of the region. Moreover, this label is well-known and trusted in neighboring countries such as France and The Netherlands, two of the biggest tourist issuers for Wallonia, without mentioning its international visibility.

On top of receiving subsidies from the Walloon government to manage Green Key procedures in Belgium, the IEW, as Green Key Global policy, requests an annual fee to its labeled establishments to deal with administrative and audit costs. Mrs. Spaey also emphasized Green Key Wallonia's will to keep the label accessible for smaller establishments. To enable all-sized structures to obtain this label, the Inter-Environment Wallonia (IEW) adapts the amount of the annual contribution to the size of the accommodations (Inter-Environment Wallonia, 2018). By doing so, the IEW's overall budget mainly depends on governmental subsidy as Wallonia counts more small-sized structures than other regions, according to Mrs. Spaey. In any case, infant industries such as ecotourism often rely on public subsidy. Indeed, the current market may not consider the long-term potential of such an industry whereas the government does and chooses to invest in worthwhile initiatives.

To obtain a Green Key label, the first step of a candidature is filling out a publicly accessible list of criteria, found in Appendix VI, pertaining to the ecological footprint of the accommodation as well as the management's efforts to inform and sensitize their clients. This list is composed of mandatory criteria as well as optional criteria. The optional criteria must be satisfied to a minimum of 30% to be certified. Independent auditors impartially control the establishment's respect of the declared criteria. A particularity of Green Key is the ongoing evaluation of actions after the granting of the label. The efforts of every accommodation are re-evaluated every year. Indeed, for the first three years following the accreditation, the independent auditors will visit sites to make sure they uphold their initiatives. Afterwards, owners will only be visited once every three years with an additional annual check of their energy consumptions and proof of improvement. The objective of this process is to control the ongoing commitment of the owners to the process (Rondelez, 2019). The IEW is itself regularly controlled by Green Key Global officials to ensure the validity of their process.

When it comes to the potential corruption of this label, several aspects of the candidature process need to be considered. First, members pay to obtain the label which could entail a conflict of interest. It can be argued the impartiality in certification is still guaranteed due to the independence of the auditors. However, one could question the impartiality of the auditors, especially as the small structures (less than 20 beds) are audited by sustainable tourism graduates personally trained by Mrs. Spaey. Moreover, only one auditor's approval is necessary for every field visit. Additionally, it is important to notice the selection bias of the Green Key candidature

process. Since the criteria are publicly available on their website, this could entice only candidates sure to be certified to apply.

3.2.2 Benefits of Ecolabels

By being accredited by such labels, ecotourism establishments can reap certain *advantages*. To begin, these provide a great marketing and promotional tool. The labels provide a greater visibility for establishments as their members are listed on different websites. Those with a Green Key label also benefit from the IEW's promotion through various media. After several years of lobbying for an international coordination, Booking.com now displays the logo of the label on the establishment's page. Indeed, small accommodations are numerous in Wallonia and this label grants them a greater visibility.

Moreover, these kinds of accreditation programs provide structure and support for actors willing to engage in sustainable development. Ecolabels provide a clear frame within which to develop. Green Key also provides counseling in the first three years to improve the sustainability of their service (Theron, 2018). Some interviewed owners are inclined to believe holding a ecolabel brings a more respectful and mindful clientele. In this case, the label favors the coherence of the overall offer.

On the other hand, ecolabels also present certain *advantages for the consumer* by guaranteeing the sought characteristics of sustainable, social and economic benefits. The more actors are labeled, the more actors will become engaged in turn ultimately, boosting the number of ecotourism offers on the market. Tourists then have a clear idea of what a certain label represents in terms of service which builds trust and entices more demand for such services (Theron, 2018).

Another advantage for the consumers of the Green Key certification in Belgium is the possibility of paying for the accommodation with EcoCheques. EcoCheques are part of the family of extra-legal benefits, such as meal vouchers. Granted by the employer to its employees, it aims to improve their purchasing power while encouraging them to act in favour of the environment. (Solbreux, 2017). This proves, therefore, as a real advantage as it provides clients the opportunity to spend said cheques.

However, the sheer number of different labels and their different claims can confuse tourists and lower the trust in these quality guarantees (Theron, 2018). Moreover, the adequacy of labels will be further analysed in the next section.

3.2.3 Relevance of Ecolabels in Wallonia

One must be careful to not take these labels as a guarantee of ecotourism excellency but rather as a marker of ecotourism intent. The relevance of these ecolabels must be considered especially in the barely charted waters of ecotourism.

The role of a label is to attest to the quality of the actions undertaken by the owners which can be undetectable by the customer either prior to the reservation and even during their stay. Indeed, Theron (2018) describes products and services respectful of the environment as “credence goods”. The label reassures the tourist on the ecotourism characteristics of the establishment and is thus a guarantee of quality. The question remains as to the credibility of the label and do they truly attest to a qualitative service in terms of ecotourism? As seen in the comparative analysis and during the secondary research, many differences in terms of level of involvement are noticeable between the 69 Green Key accommodation services in Wallonia. It could be argued this difference is a result of the optional nature of some requirements. The label loses a certain credibility in this regard as no difference in involvement is conveyed potentially discrediting excellent service providers or wrongly overestimating loafers that both bear the same label.

Moreover, the interview with Mrs. Spaey revealed no systematic procedure for the control and sanction of abusing of the Green Key name, which occurs principally amongst hotel chains. The informal denunciation and polite phone call might suffice for the current scale of affairs but should be formalized to ensure a qualitative control if the label gains in candidatures. However, the general principle of annually reviewing the affiliates enhances the reliability of Green Key. This guarantee of improvement coupled with the renewal of the criteria set every four years by Green Key Global, attest to the relevance and quality of this label to a certain extent. By all means, Booking.com requires an identification number to attest the validity of their label to bar any unlabelled business to exploit the logo. On the other hand, TripAdvisor has developed a ‘Green Leader’ label based on customer feedback on their stay. Mrs. Spaey deplored the lack of a systematic and external control to testify of its “greenness”.

All in all, few establishments in Wallonia are eco-labeled to this day representing less than 5% in almost all provinces. One could argue the absence of a label does not imply an absence of ecotourism involvement (and the presence of one does not imply a full commitment either). This small proportion begs to wonder the barriers to being labeled. On top of Theron’s (2018) presentation of unrealistic expectations of the label requirements as a factor of demotivation for

owners, other barriers have been identified. First, the administrative burden of the candidature on top of the daily management of their service can be a determinant barrier for many owners. The potential lack of adequate communication on the candidature process and the incentives of such a program could also hinder the quantity of applicants. The remaining barrier is the owner's perception of the added value and quality of such labels and ultimately the inner conviction and motivation of said owners to undertake the labeling process.

3.2.4 Utility of networks for ecotourism establishments in Wallonia

Many interviewed owners stressed the importance of the support given by the different networks to which they belonged to. The two most prolific networks when it comes to ecotourism in Wallonia are Ardennes Ecotourism and Accueil Champêtre en Wallonie.

A. Ardennes Ecotourism

With the France - Wallonie - Vlaanderen program, the Ardennes Attractivity portfolio has created the Ardennes Ecotourism project in order to create a sustainable tourism offer for cross-border Ardennes with a budget of €944,246.13 from public authorities. The Club Ardennes Ecotourism therefore includes members of the Ardennes Brand who are committed to developing and enhancing their approach to sustainable development. The objective is to apply the three pillars of sustainable development. From an economic point of view: boost the local economy through different activities. From a social point of view: promote access to tourism for everyone (people with disabilities, families in precarious situations, etc.). From an environmental point of view: not to affect the environment with tourism activity but rather help to preserve it (Ardenne Ecotourism, 2019).

According to Mrs. Drothier, coordinator of the project, membership in this club provides an added value to its members. Indeed, the coordinators organise regular meetings to share best practices and give trainings. This allows all network members to make improvements by creating a continuous positive spiral and provides value for customers who can observe an improvement in the services offered.

B. Accueil Champêtre en Wallonie

Accueil Champêtre en Wallonie is a network that promotes agrotourism and ecotourism, which aims to introduce the general public to the agricultural world. There is a real networking, through discovery tours that highlight regional actors. This allows for a local tourism that involves

local actors both in accommodation services and in short circuit commerce. As a result, economic benefits and investments are local. In addition, certain actions such as "country tours" highlight Wallonia's agricultural and rural heritage. Finally, farmers are encouraged to use more environmentally friendly materials, to make simple, innovative and energy-efficient investments, to work on reducing the amount of energy used and to raise awareness amongst tourists (Theron, 2018).

In conclusion, the objective of this chapter was to provide a status report of ecotourism initiatives in Wallonia. First, a comparative grid provided an overview of the involvement of Walloon ecotourism establishments in the three ecotourism pillars: environment, social and economic. Insights were therefore presented based on this grid. Second, an analysis of the labels and networks present in Wallonia was conducted. All these results contributed to the selection of the two case studies of the next chapter.

Chapter 4. Competitive Advantages of Ecotourism Establishments in Wallonia

In this chapter, the two considered establishments will be introduced, the Utopia Hotel & the Grange d'Ychippe. They were chosen for their particularly sustainable and ecotourism practices. These facilities will be analyzed in depth to discover whether the competitive advantages identified in the theoretical part of this thesis are indeed verified in the field.

4.1 Presentation of the two establishments

A. The Utopia Hotel

The Utopia Hotel is the result of the architect and owner, Michel Duquaine, who wanted to create a hotel concept with a unique design that would respect its environment. Michel Duquaine is a professor at the Faculty of Architecture in Mons. He teaches, in particular, a course on the economics of sustainable construction in Master 2.

The hotel was built in 2011 and is the first passive hotel in Wallonia. Passive housing is a concept that refers to a building whose energy consumption per m² is particularly low, or even fully compensated by solar gains or by the calories emitted by internal gains⁸. To meet this challenge, Michel Duquaine used his creativity to revive a magnificent place. The hotel is located in a wooded area. The building, shown in Figure 29, is the result of a particularly studied architecture where buildings subtly mingle spaces such as gardens and water areas that evoke calmness and serenity (Utopia hotel, 2019). In 2017, the owner has opted for an extension that goes beyond a simple passive building by combining the social, economic and ecological components of sustainable housing.

The hotel counts 35 rooms and suites varying from 18 to 32 square meters. All rooms are heated to an ideal room temperature all year round and have all the amenities of a typical hotel room including a flat screen TV, WIFI, safe, mini-bar and coffee machine. The hotel is located in Masnuy-Saint-Jean, not far from Mons. The place is also equipped with various meeting rooms to meet the demands of corporate seminars. The hotel's restaurant welcomes guests every day by offering guests a generous, seasonal cuisine that emphasizes flavours (Utopia hotel, 2019). All in

⁸ In Belgium, the criteria for obtaining the "passive building" certificate for an apartment building are as follows: The energy requirement for heating must be less than or equal to 15kWh/(m²/an). The air change rate measured at a difference of 50Pa must be less than or equal to 0.6 vol/h. The percentage of overheating in the building (more than 25°C) must be less than or equal to 5% (Pmp ASBL, 2018).

all, Mr. Duquaine succeeded in offering a service comprising of every feature a typical three-star hotel would on top of taking an ecotourism approach. More images of this groundbreaking hotel can be found in Appendix VIII of this report.



Figure 29. The Utopia Hotel (Utopia hotel, 2019)

B. La Grange D'Ychippe

La Grange d'Ychippe is a rural accommodation for 12 people managed by Valérie Nagant, the owner of the facility, who lives in the adjacent house. A seminar or workshop room is also available to host two dozen people or more for small receptions. The establishment is located in Leignon, not far from Ciney, and was built a number of years ago by previous owners (La Grange d'Ychippe, 2019). Mrs. Nagant decided to open this ecotourism rental accommodation in order to transpose her ecological practices and raise awareness amongst her guests about a more sustainable way of life. In addition to managing her establishment, Mrs. Nagant is a municipal councillor for the Ecolo party in Ciney and also works as an employee for Gite de Wallonie.

Pictured in Figure 30, La Grange d'Ychippe is surrounded by a beautiful 25 acres wooded garden which is part of Natagora's 'Nature Network', with a clear view over the forests of the Ardennes. Aside from fostering incredible levels of biodiversity, the common garden is also fit for football, badminton etc. Guests can also enjoy a private area with a gas barbecue, table tennis and children's games as it is certified 'Bébé tendresse'⁹. This rental accommodation mainly welcomes families and has all the necessary equipment to welcome children of all ages (La Grange d'Ychippe, 2019).

⁹ A Gites de Wallonie label for establishments that offer all necessary equipment and amenities for babies and toddlers (Gites de Wallonie, 2013).



Figure 30. The Grange d'Ychippe (La Grange d'Ychippe, 2019)

In June 2019, La Grange d'Ychippe won the prize for the best sustainable rural accommodation in Europe at the 3rd edition of the Sustainable Rural Tourism Prize organized in Catalonia. This one of many awards was given to them for their excellent customer service management while maintaining a beautiful environment (La Grange d'Ychippe, 2019). Similarly to Utopia Hotel, the Grange d'Ychippe offers at least the same standard of service as a regular rental accommodation while being involved in ecotourism. To visually discover this establishment, more pictures are available at Appendix IX.

4.2 Analysis of the Key Success Factors

In this section, the key success factors of ecotourism identified in the literature review will be further examined to establish their application in the described case studies. As a reminder, these factors have been classified as primary or support activities according to Porter's value chain.

4.2.1 Primary Activities

A. Quality

The first primary key success factor of an ecotourism offer is its quality. Swaen (2015) describes quality as an assessment of the consumer's perception of the service in relation to the

quality of the process and the environment in which the service is delivered. In terms of tourism, Mr. Duquaine debates that sustainability inevitably brings forth the notion of quality compared to quantity. To assess their consumer's perception of their service, both owners receive mainly oral feedback or written feedback through surveys on booking platforms, such as TripAdvisor, to which the owners have access.

For ecotourism establishments, guests seek certain attributes which will advocate for the quality of their stay and these include wilderness, wildlife viewing and hiking according to TIES (TIES, 2019b). At the Utopia Hotel, guests are invited to enjoy the natural area surrounding the building in part thanks to the atypical floor-to-ceiling glass wall of the restaurant. Indeed, Mr. Duquaine has endeavored to rebuild a local biotope on his property by, for instance, creating a pond and only planting indigenous plants. This has brought back many species of birds, frogs and even a roe deer to the area sighted by the customers. On top of conserving the region's natural resources, the positive feedback from the Utopia Hotel clients, in terms of their enjoyment and sense of wildlife discovery, confirm the qualitative advantage of this initiative.

The Grange D'Ychippe also holds many attributes when it comes to wilderness and hiking. First, it is part of the Natagora nature network which entails its surroundings are a beacon of indigenous flora and fauna. Indeed, Mrs. Nagant has equally received regular customer feedback pleased with her garden and the implemented initiatives that facilitate both conservation and observation of interesting local species. These initiatives include devices like an insect hotel, no use of pesticides, the planting of only indigenous plants, digging out a pond, installing a multitude of birdhouses which all stimulate the natural local biotope much like at the Utopia Hotel. Since these measures have been taken, Mrs. Nagant and her clients have observed the return of a myriad of bird species and dragonflies, for example.

Mrs. Nagant also strives to offer her guests many different hiking routes and original themed walks to discover the region's scenic and culinary attributes. For example, guests can partake in a 10km walk starting directly from the Grange itself discovering the medicinal virtues of local flora. Clients have expressed their interest and satisfaction with the accommodation's proximity to a natural reserve in which many soft hiking routes are available. The owner is thus smart to make many maps available and propose soft hiking options such as walks or bicycle trails that also start directly from the establishment.

According to Hikkerova et al. (2011), quality of the service is judged during its preparation in addition to its delivery. In this regard, Mrs. Nagan is again ahead of her competition as she systematically sends an email a week prior to her guests' arrival to inform them on all the amenities available in her infrastructure thus encouraging car sharing, as described further on. She also tactfully informs them of the establishment's ecotourism mindset and recommends buying natural hygiene products prior to arrival or directly from her. Guests have undoubtedly felt reassured by this information and expect a certain level of quality for their stay.

Hikkerova et al. (2011) continue by stating the quality of service results from a comparison between his expectations and actual perception of the service. To make sure guests perceive the quality of the service in terms of ecotourism practices, an option is to communicate these endeavours clearly throughout their stay¹⁰. As such, Mr. Duquaine has made it a point to display his personal engagement chart and the hotel's efforts towards a sustainable and ecotourism offer heightening his guests' awareness upon arrival in the hotel lobby. Brochures explaining the actual practices required from the Green Key label are also available to every guest, informing them and thus preventing greenwashing as previously discussed. With her early email, Mrs. Nagant also educates her guests and aims at increasing their perception of her establishment's quality.

Consequently, quality consists in reassuring the client and offering a service in line with the ecotourism principles before, during and after their stay. This means, before the stay, there has been a clear, effective and coherent communication. During the stay, capacity of the host to showcase the surrounding natural features and sustainable practices. And finally, to collect and act upon the client feedback.

B. Local resources

The attractiveness of the resources is a key element for ecotourism accommodation. On this subject, the Grange d'Ychippe is fortunate because it is located in the "Vallée des saveurs". Mrs. Nagant therefore has the opportunity to offer to her guests visits to local farms and theme walks organised by the Tourism House, including the aforementioned medicinal walk. As the local

¹⁰ On the other hand, Jaqueline Daloze, owner of the rental accommodation "A Quiet Place" in the Ardennes, disagrees and prefers to subtly invite her guests to act responsibly instead of bluntly asking them to. For instance, no code of conduct is displayed even in the form of small notes, however, she has placed several items such as an hourglass next to the shower to subconsciously indicate to her guests to be mindful of their water consumption.

Tourism House is very active, the attractiveness of local resources is enhanced by actors other than the owner.

According to Mrs. Nagant, there is a real symbiosis between the region, the accommodation, and many other tourism stakeholders in the region. The various activities organized in the region create a strong civic emulation. A great example is the Cocoricoop social cooperative which commercializes products from local, farm-based and environmentally friendly agriculture. Cocoricoop aims to guarantee a fair price for all, fixed by their producers. The owner of the Grange d'Ychippe promotes this local initiative by acting as a link between the cooperative and its guests. Indeed, she suggests that her guests to order their food before their arrival via the cooperative's website and she takes care of picking up the goods and placing them in the fridge to have everything ready when they arrive. The benefits for customers are many: a less loaded car, fresh products at producer prices, a local stay from A to Z, discoveries of flavourful products and their products directly in the fridge, greatly contributing to the comfort of their stay.

Mrs. Nagant acts as a link with local initiatives other than Cocoricoop. For example, she invites her guests to take a pleasant leisurely walk to discover a rich and diverse flora that ends at an pub where it is possible to savor meals made with local products. She also recommends a walk to admire sculptures made by international artists with local products. Through all these suggestions, Mrs. Nagant strongly emphasizes the actors of the region and the richness of the resources to be explored around her establishment which adds a perception of quality of service for her guests.

Mr. Duquaine also promotes the resources of his region in different ways. A fine example is the executive chef who is native to the region and who cooks mainly local and seasonal products in order to give customers the opportunity to discover the region in a tasty way. This restaurant is also a perfect place to contemplate the local fauna and flora that the hotel owner has managed to develop. Indeed, thanks to the creation of a pond, it is now possible to admire animals such as birds, frogs and roe deer. In this way, Mr. Duquaine tends to highlight the fauna and flora of his region and tries to raise awareness amongst customers towards nature.

In addition, like Mrs. Nagant, the owner of the Utopia Hotel likes to promote the products of his region. In particular, he organizes local beer tastings at the hotel so that guests can discover the cultural richness of the Mons region. He also acts as a link between the various activities offered

in the region and clients. Indeed, via the website in particular, it is possible to discover a number of possible activities not far from the hotel. He insists in particular on the belfry and the castle park, the collegiate church of Sainte-Waudru, the Havré castle, etc., which are architectural treasures of the region.

To conclude, the coherence of the whole project is omnipresent, especially for the Grange d'Ychippe. Indeed, using local resources makes sense for the owners of the establishments and it is noticeable for the customers. This therefore creates added value and contributes to the coherence of the offer. In addition, as Danziger (2019) points out, the use of local services and products is in line with the current trend of consumer demand.

C. Marketing

The next primary key success factor of any ecotourism establishment is marketing. It comes as no surprise that it can be considered as the main driver for the ecotourism boom (Duha, 2004) as its objective is to develop a demand for a product or service and fulfill the customer's needs (Business Dictionary, 2019). This section covers both cases' use of a marketing strategy, specifically a promotional strategy, in favor of their success.

It is in the best interest of accommodation services to let their partners and clients know about their ecotourism practices to generate revenue, to balance their investments and create value. An effective means to do so are ecolabels (Kis-Orloczki, 2012), as previously demonstrated. In fact, since the Grange d'Ychippe was certified Green Key in 2012, Mrs. Nagant observed a clear surge in the occupation rate compared to previously and even the previous owner. Clients have confirmed the Green Key label is an influencing factor in their choice of accommodation on top of the region. The Utopia Hotel has also achieved to obtain the Green Key label after its renovations in January 2018. Mr. Duquaine describes the Green Key requirements as sustainable rather than ecological and both owners feel they are common sense economic measures every establishment should put in place. Not only does it serve as a promotional tool, they simply allow for economical savings. Moreover, this ecolabel requires the recipients to improve year after year. This allows for owners with less means to progressively work on their sustainability, as is the case for Mrs. Nagant. Most important, this process also allows her to communicate about it regularly on her website creating more clicks and clout each time.

Nevertheless, ecolabels can be instrumental in some accommodations' greenwashing strategies. For hotels merely interested in bumping up their visibility, ecolabels can sometimes act against their primary function as a greenwashing tool. This happens when the requirements are not as strict. For instance, the evolutionary mindset of the Green Key label allows for establishments with a long way to go to potentially get certified. The problem arises if they have no intent on changing anything in the near future or if they overly parade their label. The Mons Hotel Van der Valk's strategy is a great example of the use of the Green Key label as a greenwashing strategy. The Van der Valk group had received the label for their establishment in Verviers when in fact they displayed the Green Key label logo on every hotel in their group's webpage. Mr. Duquaine was quick to point this out to Green Key authorities as he was well aware the Mons labels were not yet attributed, being in the process himself. While the Van der Valk gained a short lived competitive advantage by abusing the image of a label online, the other key success factors no doubt revealed to the guest their usurpation of the ecotourism movement.

On another note, the Grange d'Ychippe and the Utopia Hotel can also accept payments by Belgian EcoCheques thus confirming their validity as ecological service providers (Service public fédéral emploi, 2019). Indeed, one of the advantages of the Green Key certification in Belgium is the possibility of paying for the accommodation with EcoCheques.

An important tool of Mrs. Nagant's promotional strategy is the Grange d'Ychippe website. As mentioned, she regularly updates her news tab with progress made to her accommodation and new local activities, as well as showcase her certifications. This strategy seems to pay off as half of her guests book directly through her site. The other half mainly comes from brick and mortar travel agencies and TripAdvisor. The latter can be useful as Mrs. Nagant uses guest satisfaction feedback to promote her establishment however she is often disappointed by the quality of guests brought by TripAdvisor. The Utopia Hotel's guests also come primarily from the website coupled with a large share from Booking.com.

However, in our day and age, it is important to notice that very few establishments use social media effectively to promote their ecotourism activity or even their tourism activity at all, as is the case for the Grange d'Ychippe and the Utopia Hotel.

According to Owczarczak (2016), marketing is used by tourism professionals to obtain a competitive position on the Walloon tourism sector. As ecotourism is part of the tourism sector, it

is therefore necessary for owners of ecotourism establishments to use marketing effectively without falling into a pattern that goes against the fundamental principles of an ecotourism establishment.

4.2.2 Support Activities

A. Infrastructure

The third key success factor of any ecotourism and tourism establishment is the infrastructure supporting it. As discussed in the first part of this report, the ecotourism industry requires “the construction of basic facilities to support the whole value chain.” (Lee & al., 2010). Jovanovic & Ilic (2016) describe tourism infrastructure as “physical elements that are designed and erected to cater for visitors. [It] includes a large number of services, necessary to meet the needs of tourists and increase their satisfaction during their stay at the destination.”

In terms of *infrastructure* that makes the tourist destination available for guests, the Grange D’Ychippe is easily accessible. Moreover, it is also easily accessible via low-impact modes of transportation, a definite advantage for eco-conscious clients. The rental accommodation is situated at a walkable distance from the train station in Ciney, a car sharing company is also present in Ciney. The establishment is conveniently accessible by bike and a local bicycle renting firm is open in the summer. When it comes to the Utopia Hotel, the access by low consumption modes of transportation is also favoured with smooth bicycle and train access. On top of those, the hotel has also installed a charging station for electrical cars in their parking lot.

Infrastructure also counts complementary facilities, equipment, systems, processes, and resources which are needed for the day-to-day operations of a tourist destination (Jovanovic & Ilic, 2016). For a regular tourism venue, such systems might count health care for which Mrs. Nagant pointed out her proximity to the closest hospital. When analyzing ecotourism venues particularly, establishments with relevant local services and public services are at a definite vantage point. As such, the Grange d’Ychippe is situated in a very proactive municipality for sustainable development initiatives as developed earlier. Moreover, the region also counts local firms such as linen cleaning and gardening services. The Utopia Hotel is also fortunate to be located in an area that counts similar services such as local food cooperatives. The hotel can thus use and serve produce from regional small producers. These services definitely support the whole value chain in the most sustainable way possible being so close to inject economic value to the community and sharing the same sustainable values while offering guests a quality service.

Furthermore, Popesku (2011) differentiates infrastructure from *suprastructure* and defines the latter as buildings whose sole reason for being there is the tourism activity. Its main purpose as “accommodation and meeting the needs and desires of tourists, in the form of hotels, campsites, restaurants, sports facilities, and the like” (cited by Jovanovic & Ilic, 2016). In terms of ecotourism, the Utopia Hotel holds an advantage in its suprastructure as the building itself was one of the first passive hotels in Wallonia. The low energy consumption of the building thus brings on more added value to its commercial value, states Mr. Duquaine. Moreover, the esthetic beauty of the building in itself was carefully considered with a floor-to-ceiling glass wall in the dining room immersing the guests in the luscious neighboring nature. The general silhouette of the building and the annex was also considered in the design process to minimize its visual impact on the environment and the guest’s eye.

The Grange d’Ychippe on the other hand has utilized its suprastructure in terms of the availability of the equipment. To resolve the problem of the overuse of cars to access her accommodation. Mrs. Nagant has made available an impressive array of baby equipment from the dining chair to the stroller to the bed and even toys. Considering her main public is families, this was a smart move to increase the comfort of her guests as well as allowing them to consider car sharing thanks to their lightened load. In terms of environment, the rental accommodation also benefits from a lagoon water treatment system installed by the previous owners specifically for their property. This complementary infrastructure is a definite plus for clients looking for a true environmentally-friendly accommodation.

All these examples illustrate the importance of a set of infrastructure that enables differentiation and adds value to an overnight stay in an establishment.

B. Human resources management and partnerships

As outlined in the previous part of this report, the success of projects, institutions and complex development initiatives depends not so much on the sheer number of human or financial resources available, but on their effective management. As the Grange d’Ychippe does not employ direct staff, an analysis of its human resources management does not appear to be relevant.

The Hotel Utopia employs 22 staff members. According to Mr. Duquaine, all employees are informed by himself and the establishment manager about the hotel's sustainable values. Indeed,

training is given to staff in order to teach them the right reflexes to adopt regarding the environment. These include environmentally friendly cleaning practices, the use of local products in their restaurant, the use of native plants in green spaces, etc. With regard to the results of the staff awareness objective, it is possible to note that some people do not understand the value of this type of behavior. Nevertheless, the people who run the establishment, namely the hotel manager and the restaurant chef, are driving forces in the direction of sustainable development and have been hired for their skills but also because of their environmental mindset.

Additionally, in order to encourage the employment of young people, Mr. Duquaine hires people through the Training-Inclusion Plan. It is a system that makes it possible to train a job seeker according to the specific needs of a company and to hire him for a period at least equivalent to the training (Forem, 2019). Nevertheless, as Mr. Duquaine pointed out, adopting ecotourism practices sometimes requires taking a firm stand. For example, the maintenance of outdoor spaces such as mowing grass does not promote biodiversity and is thus negative from an environmental point of view. However, this encourages the social side because it creates jobs. Confronted with this dilemma between social and environmental aspects, the owner of the establishment took a stand for employment.

Moreover, to be successful, partnerships between the establishments and local actors have a significant impact on the successful running of the project. The Grange d'Ychippe has understood the importance of partnerships. Indeed, since the opening, Mrs. Nagant has constantly developed partnerships with local producers and other tourism stakeholders such as outdoor activities and tourist offices. Figure 31 presents the different partnerships developed by Mrs. Nagant. A good example of partnership is with the Natagora nature network. Thanks to this initiative, the biotope around the accommodation has considerably evolved. For example, Mrs Nagant no longer buys non-native plants, has set up an insect hotel, has also built a small pond, which has allowed the fauna around it to grow. As a result, guests are able to discover species that they had not seen before which creates value.



Figure 31. Partnerships developed by Mrs. Nagant (La Grange d'Ychippe, 2019)

Another important partnership of this establishment is the partnership with Ciney Zéro Déchet. By choosing this accommodation, the owner offers workshops in collaboration with Ciney Zéro Déchet. In addition, a range of equipment to help guests in this process is available (a starter kit with good addresses, basic products, some containers: basket, bulk bags, reusable bags, shopping jars, ...). Mrs. Nagant is open to any proposal concerning Zero Waste and will be happy to help guests in this process.

On top of her use and acceptance of the local currency, the last partnership important to highlight regarding the Grange d'Ychippe is the one with the Ardennes brand and more precisely with the Ardennes Ecotourism club. As previously mentioned, in addition to providing visibility to customers through the various communication channels of the Ardennes brand, Club Ardennes Ecotourism members are also able to benefit from the strength of a network (exchanges of experiences and good practices, pedagogical tours to discover the players in sustainable tourism in the Ardennes, information sessions, etc.). For Mrs. Nagant as well as for other owners of establishments, managing a rental accommodation or a guest house can sometimes be an activity where the owners feel very lonely. This type of network is therefore extremely valuable for them because it motivates them to continuously work on improving themselves through the various possible exchanges between members of this club.

The Hotel Utopia has considerably fewer partnerships. Nevertheless, the existing ones are quite interesting in terms of value created for customers. Indeed, being located near Pairi Daiza, one of Europe's best zoological parks, the Utopia Hotel offers packages including the overnight stay and breakfast at the Hotel as well as Pairi Daiza entrance tickets and some additional advantages. Another interesting partnership is the one with *Supreme Headquarters Allied Powers Europe (SHAPE)*. This military site is located in Mons close to the hotel. Through this partnership, a preferential price is offered to employees, military personnel and site visitors. Both initiatives bring in more demand and extend the customer base.

Partnerships are thus an essential component of an ecotourism offer though primarily classified as a supporting activity. The extent of its relevance for ecotourism accommodations will be developed further in this paper.

4.3 Generic competitive strategies

To get an idea of the pricing strategy of the two case studies, a simulation booking was made to compare the different offers to their competition. This analysis aims at understanding where these establishments are positioning themselves in the Walloon tourism market.

A. The Utopia hotel

In order to compare the prices of competitors of the Utopia Hotel, a simulation booking was conducted on *Booking.com* for a standard two-person room August 17-18, 2019. The establishments presented below are hotels in the Mons region, offering a level of service comparable¹¹ to those offered by the Utopia hotel.

1. Orange Hotel La Louvière
2. Van der Valk Hotel Mons
3. Hotel Le Monte Cristo Mons
4. Ibis Mons Centre Gare
5. Martin's Dream Hotel Mons
6. Hotel Le Terminus Mons
7. Hôtel Tristar La Louvière

¹¹ Three to four stars, breakfast, reception open 24 hours a day, private bathroom, WIFI.

Hotel	Utopia	1	2	3	4	5	6	7	Average price
Price	€80	€72	€92	€61	€81	€95	€74	€75	€79

Table 2. Price of a standard room for two people in neighbouring hotels

In this case, the reference offer is based on the calculated average price and an average quality perception. It is therefore a fictional reference offer constructed for the purpose of this study. From this table, it can be observed that the price of a standard room for two people at Utopia Hotel is comparable to the average market price. Based on Bowman's strategic clock, the hotel's strategy can be defined as *differentiation*. Indeed, this strategy consists in distinguishing itself from the competition by offering a higher perceived value than the reference offer without increasing the price of the concerned product. The differentiating element is to offer the guests a sustainable service in accordance with the values of ecotourism. In conclusion, this demonstrates that it is possible to offer a qualitative ecotourism stay at a price that is comparable to other tourism offers. The different studied hotels are placed on Bowman's strategic clock in Figure 32. The estimation of the perceived value to the customer was based on a subjective evaluation of different criteria including the number of stars, the location, the quantity and quality of services provided by the hotel (opening hours of the reception, spa, parking, etc.).

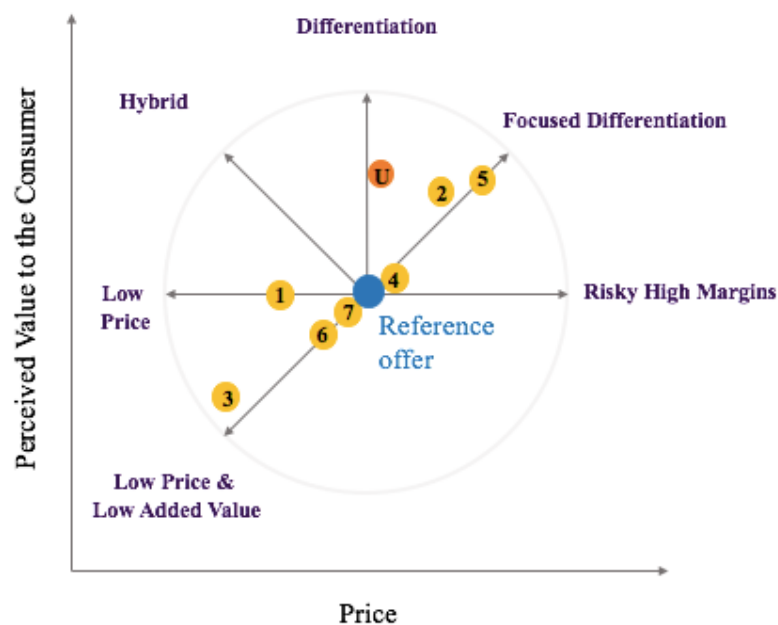


Figure 32. Bowman Strategic clock applied for the selected hotels

B. The Grange d'Ychippe

In the same way, a simulation booking was conducted for a series of holiday accommodation rentals without service in the region of the Ardennes for the month of August on TripAdvisor. The website provides the average fee per night of the month of August. As all establishments¹² have a different number of beds, the table below holds the average price per bed. The analysed establishments are:

1. Gîte Mosan
2. La Chaumière d'Alhoumont
3. Anthropologîte
4. Monsieur Nips
5. Chez Estelle
6. Gîte de Redu
7. Le Poirier

Establishment	Grange d'Ychippe	1	2	3	4	5	6	7	Average price
Price	€20,24	€12,67	€25	€17,55	€18,83	€30,35	€24,33	€32,58	€22,69

Table 3. Price per bed of neighbouring rental accommodations

Similarly to the hotel analysis, a fictional reference offer was fabricated based on the price market average and an average quality perception of the eight rental accommodations. By analyzing the data in Table 3, the main observation is the price for a bed at the Grange d'Ychippe is just under the area's average price by €2.45. If a strategy was to be attributed to the establishment based on Bowman's strategic clock, it could be argued the accommodation falls between a *hybrid* and a *differentiation* strategy. Indeed, depending on the client's perception of the value of money one could say the Grange d'Ychippe is distinguishing itself from the competition by offering a higher value service for a relatively similar price. However, if the client views those €2.45 as determinant in their choice, they thus believe the Grange d'Ychippe is offering a better quality/price ratio as the perceived value exceeds reference offer at a lower price. This would then qualify as a *hybrid* strategy. However, as the data of this study ranges from €12.67 to €32.58, the

¹² All establishments counted between 6 & 14 beds and were in a 50km radius from the Grange d'Ychippe. Calculations were made assuming all the beds were occupied and without considering cleaning fees.

scale is of the order of €20 making the €2.45 difference with the average more than 10% of the scale, indicating a *hybrid* strategy is the more fitting option.

The different rental accommodations studied are placed on Bowman's strategic clock in Figure 33. The estimation of the perceived value to the customer was based on a subjective evaluation of different criteria including customer feedback on TripAdvisor and the quantity and quality of services provided by the rental accommodation (linens, jacuzzi, etc.).



Figure 33. Bowman Strategic clock applied for the selected rental accommodations

All in all, both analysis showcase it is possible to offer a thorough ecotourism experience in the Ardennes for less than the average price of other tourism offers. This pricing strategy is crucial as ecotourism is still an infant industry. Adopting a quasi freemium¹³ pricing strategy is a smart move to build a customer base before potentially being able to increase the profit margin by increasing prices. Nevertheless, the primary objective of these owners does not seem to prioritize personal financial profit. The low pricing may just be contributory to the whole coherence of their offer.

¹³ The term freemium is a type of business models where “users get basic features at no cost and can access richer functionality for a subscription fee.” (Kumar, 2014)

In this chapter, the Utopia Hotel and the Grange D'Ychippe have been introduced and used to compare practical examples of competitive advantages theoretically identified: quality, local resources, marketing, infrastructure and human resources management and partnerships. These establishments have also been studied in depth through the Bowman strategic clock: while the Utopia Hotel adopts a strategy of *differentiation*, the Grange d'Ychippe falls between a *hybrid* and a *differentiation strategy*. The next chapter will present the main insights of the literature review and empirical studies while closing with suggestions for further research.

Chapter 5. Conclusion & Further Considerations

Ecotourism has been developed by many authors since the 1980s, covering its evolving definition and normative principles as well as its implied positive repercussions on local communities and their natural environment. The objective of the first part of this thesis was to aggregate and refine the definition of ecotourism and identify the competitive advantages from the existing literature. From there, the empirical analysis explored the state of ecotourism in Wallonia and its key success factors using two Walloon ecotourism accommodation services. The main insights and further considerations are presented below.

Literature Review Main Insights

Overall, the literature review confirmed ecotourism's status of infant industry. This firstly entails a lack of terminology standardization. As seen, many different terms capture the essence of ecotourism often coupled with various other notions in their definition. Besides, what Ceballos-Lascurain defines ecotourism as is also labelled 'sustainable tourism' in other countries like Belgium. These overlaps are to be expected as the concept is relatively new and the few ecotourism initiatives that do exist are widespread and isolated across the globe. Scientific authors have yet to entirely agree on one denomination (and its translations) for this new type of tourism. Overall, the common use of the term 'ecotourism' entails involvement in environmental, social and economic issues, which is the reason why Ceballos-Lascurain's all-encompassing definition was chosen for this thesis.

Furthermore, the best practice analysis revealed that even chosen leaders in the field do not excel at all three pillars simultaneously. The established theoretical optimal is realistically challenging to attain. This can again be explained by the both young and thin-spread nature of the ecotourism industry. Information on best practices is scarce and poorly detailed proving difficult for the model to spread quickly, as can be said for other business models in their early stages.

Empirical Research Main Insights

Status Report

The comparative grid provided a status report of the involvement of Walloon ecotourism establishments in the three ecotourism pillars. All three pillars failed to meet 50% of met criteria in average. The studied establishments have nonetheless shown a bigger involvement for the

environmental pillar than the social and economic one. The difference of implication between the different areas could be explained by the personal appeal of the owners and government officials for environmental issues, amongst others. In general, the larger quantity of environmental criteria points to the higher consideration of this pillar by labels and public authorities which the grid was based on. This view of the three pillars can be associated with Daly's (1995) concept of strong sustainability, represented in Figure 34, whereby "economic activities are part of the social domain, and both economic and social actions are constrained by the environment" (Wu, 2013). Other interesting insights could be revealed by reiterating a status report for past and future years to uncover the evolution of the ecotourism involvement in Wallonia.

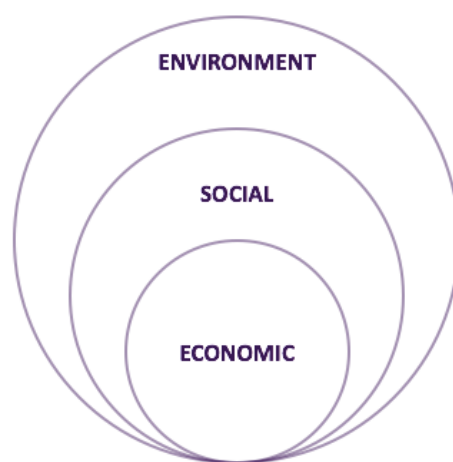


Figure 34. Illustration of the three pillars of Strong Sustainability (Wu, 2013)

Competitive Advantage

The two case studies illustrated what would be the key success factors of an accommodation activity in the ecotourism industry in Wallonia. Amongst them, an *efficient marketing strategy* coupled with a *relevant pricing strategy* emerge as fundamental with a *strong partnership policy* as the essential cornerstone of any successful venture.

As observed, marketing is crucial to hook the customer's attention effectively. Promotion is crucial for any infant industry as it is vital to convince the client and create a demand. Tourists need to be efficiently informed and convinced of the added value of these accommodation choices without being confused by foreign concepts such as the different labels. The Grange d'Ychippe owner, Mrs. Nagant, demonstrates this well with her informative and intuitive website coupled with her mailing strategy. She exemplifies that a clear marketing strategy can be achieved even by a small business owner with little to no marketing background or means. Creating credibility is

essential as ecotourism activities are still marginalised in the tourism industry and clients must be aware of the involvement of the establishment to grasp its integrated ecotourism engagement.

Moreover, both case studies have achieved to price their offer at or below market average, a crucial move for ecotourism offers. Even though sustainable ventures are currently trending, sustainable tourism services are still sparse and existing channels are doing their best to inform and convince tourists of the coherence of their offer. It is thus important to make sure clients wanting to explore this new mode of traveling can do so at the same or even at a lower price. Undeniably, marketing and pricing strategies are crucial for the success of any venture. However, the dominant competitive advantage of any ecotourism accommodation service in Wallonia is rooted in its network of partners.

Drumm & Moore (2002) presented the success of ecotourism initiatives as resulting from the “formation of strong partnerships so that the multiple goals of conservation and equitable development can be met”. The empirical cases studies led to the same conclusion. However, success in the Walloon ecotourism industry is less reliant on protected area managers than theoretically introduced. Rather, the role of facilitation and relationship catalyst is taken on by the private owners, like Mrs. Nagant and Mr. Duquaine, who take advantage of the activities organised by local tourist offices. Local public tourism offices not only promote their region’s natural features, most of them also organize dedicated activities and tours for tourists. For the Grange d’Ychippe especially, *partnerships* with such actors seems to be particularly important. Since the opening, Mrs. Nagant has constantly developed affiliations with local and regional actors to create a strong network around her accommodation in order to strengthen the relevance of her offer. The outcome confirms that a strong partnership policy is a significant asset. Creating an interesting network has the potential to differentiate the positioning of one’s establishment and reinforce the quality of the service in the minds of tourists. Creating a unique network of partners is an almost infallible competitive strategy as it is near impossible to replicate, even in the same location. Moreover, ecotourists generally search for meaning in their actions. An establishment gains more credibility when it has an integrated local policy. Therefore, those with the capacity to broaden their local partnership portfolio and deepen existing bonds to form substantial alliances will definitely gain a competitive advantage in the Walloon ecotourism industry.

On top of revealing the importance of partnerships, the empirical research brought forward another instrumental factor: the *management’s intrinsic motivation*, which is not prioritized in the literature. By interviewing the case studies’ owners with regards to their customer’s experience, it

is evident that the authenticity of the owners' approach is omnipresent. Indeed, on top of managing their own establishment, they strive to highlight Wallonia's rich and diversified heritage. This is relevant for many industries but has a powerful impact on the main competitive advantage which is creating a network of partners. The Grange d'Ychippe's many partnerships result from the owner's personal implication in local politics and affairs and her proactive role to form alliances. For these reasons, the motivation of owners to share their passion acts as a driving force for a whole network of actors. The success of the two showcased projects mainly relies on this final factor as it contributes to the whole project making sense. Even though this aspect is rather intangible, it has been identified as a definite force to build a competitive advantage in such an industry and offer a successful and coherent service.

In order to map the complex network of alliances around the Grange d'Ychippe and its municipality, Leignon (Ciney), Drumm & Moore's diagram of principle stakeholders (presented in Part 1: 1.4 Principle Stakeholders) was consequently adapted to feature owners as vital in the success of ecotourism. In a nutshell, the quality of an accommodation service in the ecotourism industry of Wallonia is correlated to the quality of its partnerships, and thus the quality of the links between each actor of the diagram in Figure 35.

All in all, the empirical research of this thesis showcased the current level of involvement of Walloon ecotourism establishments for each of the three pillars, pointing out environmental concerns as a clear priority. The case studies then allowed to confirm the theoretical competitive advantage of partnerships and showcase the motivation of the owners as an added value.

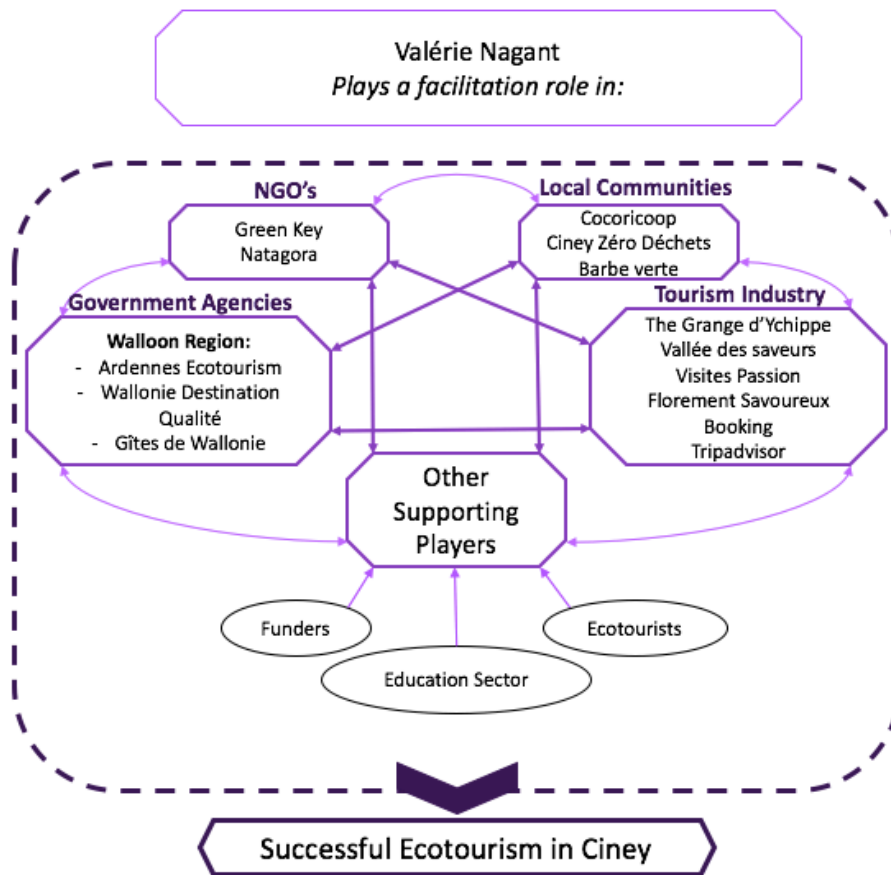


Figure 35. Adaptation for the Grange d'Ychippe of Drumm & Moore's (2002) representation of the main stakeholders of ecotourism

Further considerations

The purpose of this section is to describe potential research subjects for additional contributions to the analysis of ecotourism in Wallonia. In order to better understand the inner workings of such a sector and identify the potential benefits of its network, the role and impact of each node and additional stakeholders are to be acknowledged. The principle stakeholders designated by Drumm & Moore (2002) present an optimal starting point to cover all aspects of an ecotourism ecosystem. The role and impact of two of these stakeholders in particular, local producers and public authorities, could prove to be relevant. Moreover, when moving beyond Drumm & Moore's model to a broader ecosystem, the concept of transport to the accommodation is to be dealt with as well as studying the role and desires of the ecotourists themselves.

A. Local products and services

One of the challenges of ecotourism being to stimulate the economic actors of a region, it is encouraged to promote sustainable and local products and services (Spaey, 2017).

Following the analysis carried out in the previous chapter, it seems obvious that a partnership approach between different tourism stakeholders in a region is an asset and enables a more qualitative positioning. The 'Ruche qui Dit Oui' provides a great example of such an efficient structure. This network of short circuit sellers links small sustainable producers to local communities through small vendors and pick up points (La Ruche qui Dit Oui, 2019). The success of ecotourism ventures relies on the quality of the developed partnerships.

Nevertheless, creating a sustainable network of partnerships is a significant challenge. Introducing a franchise system could be a solution to gain competitive advantage while sharing the financial costs through a network and compensate the efforts deployed. For instance, a franchise partnership with, for instance the Ruche qui dit Oui, to supply ecotourism accommodations could prove efficient. These ventures could even be implemented through the public authorities or labeling organizations. Franchising partnerships for different sites could prove to be a competitive positioning for many a village of Wallonia. Additional research on franchising opportunities with Walloon stakeholders could be relevant for the development of ecotourism in certain municipalities, if they chose to position themselves as an ecotourism destination.

B. Public authorities

The support of local governments is a significant factor in the success of an ecotourism project. Indeed, amongst others, it is thanks to the initiatives of a local public authorities that this type of project can emerge and prosper. A project such as Ardennes Ecotourism allows the dynamism and entrepreneurship of an entire region and launches a virtuous circle. The support of local governments is a significant factor in the success of an ecotourism project.

According to Spaey (2017), it seems that the Walloon government's policy on sustainable tourism should be clearly strengthened and deserves more investment. This author insists on Wallonia's remarkable natural heritage compared to neighboring regions and an increasing demand for more sustainable tourism products and the need for these products to be coherent and more clearly identified. The support of ecotourism by local authorities could represent a real differentiating factor compared to other tourism destinations and therefore contribute to the economic, ecological and social prosperity of the region. Further research on the current tax and subsidy policies and measuring the potential of updating them would be welcome. Studying the actual willingness of Belgian authorities to boost more sustainable industries in general compared to other countries would be insightful. As of now, most ecotourism businesses are small-scaled and isolated throughout the country. Are the present policies and government initiatives enough

encouraging a comprehensive ecotourism approach? How could they be more efficient if this even falls under their responsibility? What systems can be put in place to support small ecotourism business owners and boost their credibility? To sum up, a consequent research lead would be evaluating the role of public authorities in the infant industry that is ecotourism.

C. Transport

Transport is an essential component of tourism and consequently a rather problematic one of the ecotourism industry. Indeed, many authors agree that transport is the segment of tourism that has the highest impact on the environment. It is also the one that is growing the fastest in terms of greenhouse gas emissions and for which public policies have obtained only very weak results (Spaey, 2017). According to Paul Peeters, an expert in sustainable tourist transport at the University of Breda, “today, 70% of tourism's greenhouse gas emissions come from transport, more than half of them from aviation [...] by the end of the century, the number of tourist trips will increase fourfold [...]. There is an urgent need to develop more environmentally friendly means of transport” (Thiberge, 2018).

The most commonly used means of transport in Wallonia is the private car, which is a particularly polluting mode of transport. Its use produces a series of environmental nuisances: emissions of CO₂, atmospheric pollutants, occupation of public space, need for infrastructure, noise, road accidents and congestion, to name a few. Amongst the most commonly used motorized modes of transport, buses and trains can be considered the most environmentally friendly (Spaey, 2017). Therefore, an evaluation of Wallonia's public transportation grid's potential to serve ecotourism hotspots is recommended. In addition, given the large offer of public transport in Wallonia, the use of such transports would only increase the coherence of an ecotourism offer in this region.

When looking at zero-emissions modes of transportation, conventional (non-electric) bicycle travel is one of the most environmentally friendly. Indeed, cycling, like walking, does not emit greenhouse gases and does not consume any energy, except that of the cyclist. According to official figures from the General Commission for Tourism, one out of five tourists discovers Wallonia by bike or by foot (Spaey, 2017). It comes as no surprise as Wallonia benefits from an extensive RAVeL infrastructure. Indeed, the Réseau Autonome des Voies Lentes (RAVeL) is composed of more than 45 marked greenways that are gradually linked to each other to compose the ten regional and four international routes that cover the entire Walloon territory and are intended

for bicycle tourism. The network makes it possible to travel through Wallonia in complete tranquillity over more than 2000km and to discover large cities, rural areas and preserved natural spaces (Fédération Wallonie Bruxelles, 2019). However, in Wallonia, precise information on this form of tourism is not yet available as precise surveys or counts have not yet been carried out at the territorial level (Spaey, 2017). In addition, opportunities for pedestrian tourism could also be explored. Indeed, Wallonia has 5000 km of marked trails called "sentiers de grande randonnée (GR)". These are marked hiking routes of variable length that allow for multi-day treks (Les Sentiers de Grande Randonnée, 2019). All in all, this makes riding a bicycle or even walking to and from accommodations a relevant subject to analyze in further research.

D. Ecotourists

Moreover, ecotourists themselves can be considered as part of peripheral, and even core, actors in the ecotourism industry in Wallonia. Considering the lack of recent information, building an up to date ecotourist profile would prove an insightful way in to the question of demand for ecotourism services, especially in this territory. Their input on the importance of each pillar could also prove useful for the evolution of labeling requirements.

Ultimately, ecotourism presents many environmental, social and economic opportunities that would be interesting to further analyze especially considering the infant status of the industry.

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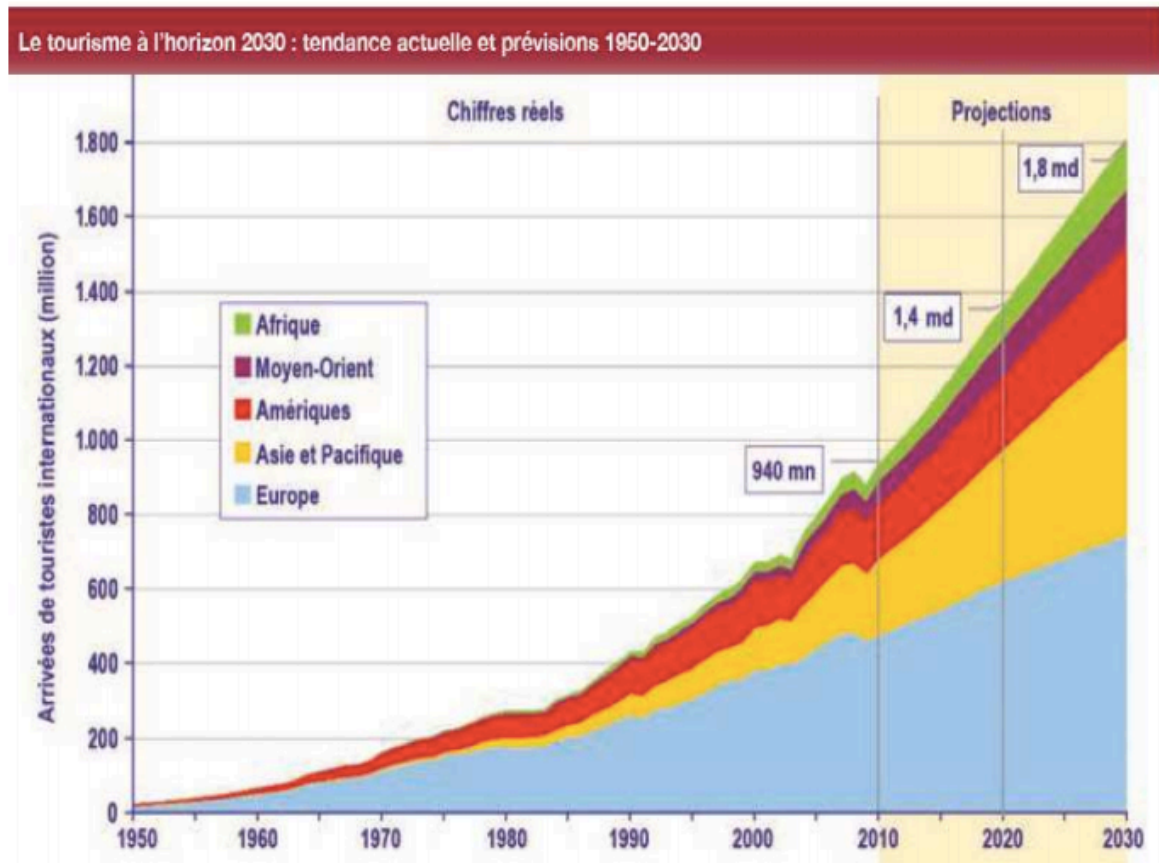
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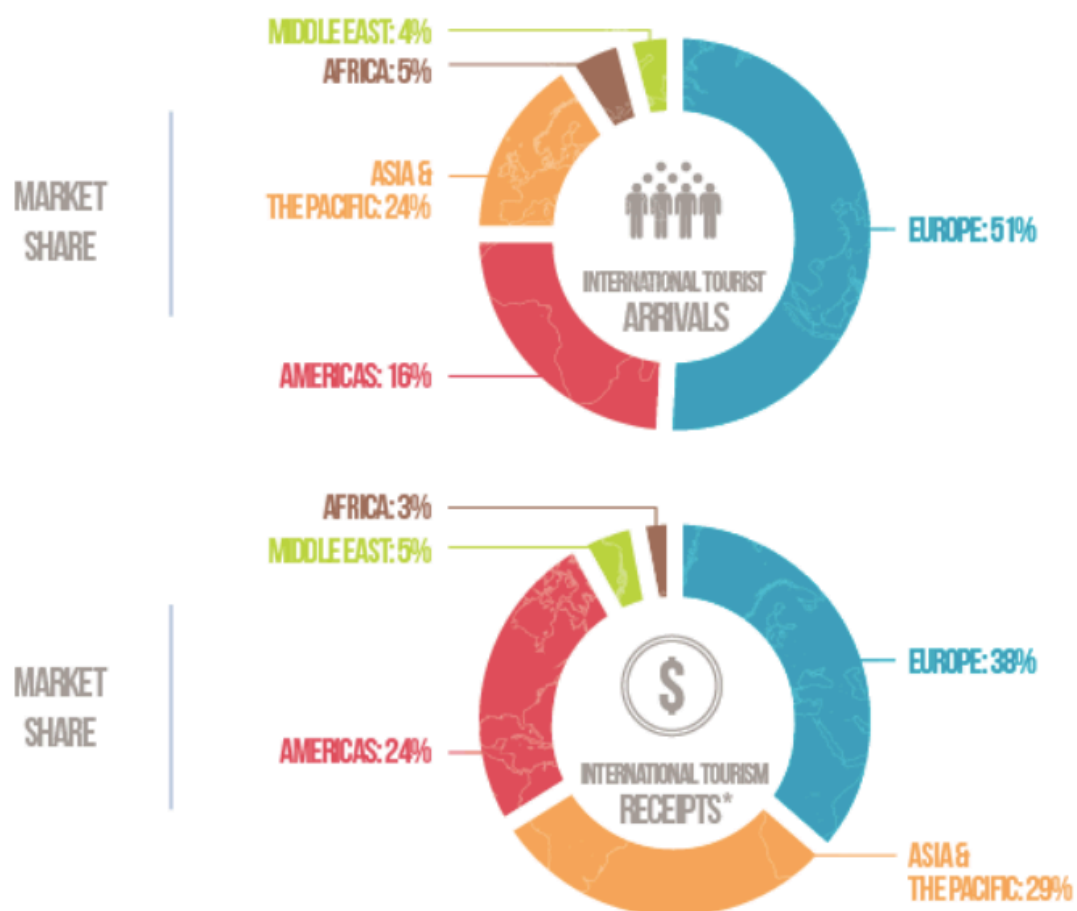
PART IV: APPENDICES

Appendix I: Growth curve of tourism industry and prediction for 2030

(De Myttenaere, 2018)



Appendix II: OECD market shares of international arrivals and receipts
(UNWTO, 2017)



Appendix III: Industry Quality Continuum

(Neil & Wearing, 1999)

Table 3.1 *Industry Quality Continuum*

<i>Codes of practice</i>	<i>Compliance</i>	<i>Accreditation</i>	<i>Quality system</i>	<i>Certification</i>
Explanation				
● Industry general guide to behaviour	● Informal	● Formal	● Formal	● Formal
● No requirements for participation by individual or organization	● Complying with codes	● Voluntary	● Voluntary	● Compulsory
● No enforcement	● Voluntary participation	● Administered by industry or other body	● Externally driven	● Externally approved standard
● Little promotion	● Can possibly require the signing of an agreement	● Involves standards of skill, experience or activity	● Conformity with external standard or best practice	● May be regulatory
	● Rarely any enforcement	● May involve audit of individual or organization	● Involves audit and benchmarking	● Involves audit
			● The entire organization participates	● Withdrawal for noncompliance
				● Involves penalties
Examples				
● Ecotourism Association of Australia	● PATA Green Leaf	● Savannah Guides	● AS3902 (Quality in Service)	● Builders' licence
● Pacific Asia Travel Association (PATA)	● Green Globe	● National Ecotourism Accreditation Program	● ISO 9000	● May include Natural Resource Manager permits
● New Zealand Tourism Industry Association		● Tourism Vanuatu Accreditation	● ISO 14000	
● The Ecotourism Society			● BS7750	
● Tourism Council Australia				

Source: adapted from Manidis Roberts, 1994

Appendix IV: Detailed explanation of international ecolabels

- *ECO certification program*



As a world first, the ECO certification program originated from Australia in 1991 to be able to identify genuine nature and ecotourism operators (GEN, 2019). It belongs to the Ecotourism Australia organization however, this business development tool has reached international recognition over the years where leaders in ecotourism can contribute their experiences in best practices and continuous improvement strategies. Travelers can expect certified members to respect environmental norms and a high-standard service while being environmentally, socially and economically sustainable. The comprehensive certification programme is separated in four regularly audited phases. Establishments in all sectors of the travel and tourism industry have access to two levels of certification “Self-Assessment Completed” and “Professionally Audited” (GEN, 2019).

- *Green Key*



Founded in 1994, the Green Key label is the most widespread and internationally recognized ecolabel rewarding accommodations and hospitality facilities in 57 countries. It is considered a benchmark indicator in the field of environmental responsibility and sustainable use in the tourism industry. Green Key has accredited over 2900 establishments, guaranteeing their contribution and positive initiatives to make an environmental difference. The non-profit label is independently audited in most countries and supported by the World Tourism Organization (WTO), the United Nations Environmental Programme (UNEP) and United Nations Educational, Scientific and Cultural Organization (UNESCO). Their objectives are raising awareness of all tourism stakeholders (guests, staff and suppliers), reducing the overall use of resources and adjusting the behaviors in the hospitality and tourism industry in general (GreenKey, 2014).

- *EU Ecolabel*



Carried out by the European Commission, the EU Ecolabel was created in 1992 and accredited its first products in 1996. The scheme awards products and services that meet environmental standards throughout their whole life cycle. Any producer, importer or retailer has to apply to be considered for this token of environmental excellence recognized in Europe and around the

world. This labels thus covers all industries with the most licenses towards tourist accommodations services notably hotels and campsites.

To become EU Ecolabel certified, each establishment must follow mandatory criteria, developed and revised by experts and stakeholders, including limited energy and water consumption, reduced waste production, use of renewable resources and less hazardous substances for the environment as well as promotion of environmental education and communication. The implementation of the scheme is reviewed by the European Union Ecolabelling Board annually (European Commission, 2019a).

- *Travelife*



Launched in 2007, Travelife is one of the youngest certification programs already used by around 200 tour operators, travel agents, hotels and accommodations services. Co-funded by the eco-innovation initiative of the European Union, they claim to be one of the most comprehensive and credible tools in the travel and tourism industry (Travelife, 2019). Through their online system, these actors can monitor and self-assess their sustainability performance based on criteria curated through a multi-stakeholder consultation process involving tour operators, hoteliers, trade associations, Non-Governmental Organizations, audit firms and academia. Some criteria are addressed directly at the travel agency, some concern their relationships with their partners or hoteliers and finally, some pertain to the education of the client. Agencies willing to become sustainable are granted access to numerous tools such as an online software of action planning, a benchmarking system and an online programme that evaluates hotel performance in terms of sustainability (Bugnot, 2013).

- *Biosphere Responsible Tourism - Biosphere Certification*



Developed by the UNESCO and WTO, this certification follows the quality and environmental requirements of ISO 9001 and ISO 14001 as well as sustainable development guidelines such as social responsibility, cultural goods conservation, responding to destination enquiries from tourists and bettering the quality of life of local communities (Responsible Tourism Institute, 2019).

- *Green Globe Certified*



Green Globe assesses travel and tourism companies as well as their supply chain partners on their sustainability performance. Every tourism related product and service is eligible for certification, be it accommodation, transportation, entertainment and attractions, restauration and so forth. Overall, they aim at complying with the highest international standards. In order to do so their certification is based on 44 criteria comprising four areas: sustainable management, social and economic management, cultural heritage and the environment. Clients are appointed a third-party independent auditor to work with them on-site. Their management of audit programs, internal and external management systems and competence and evaluation of auditors were all based on ISO 19011:2002 guidelines. The entire Green Globe Standard is reviewed and updated twice per calendar year.

There is a major difference between "Green Globe" and "Green Globe Certified". Indeed, any organization that wants to enter the process and pays the membership fee can post "Green Globe" without having adapted its practices. "Green Globe Certified" demonstrates that the structure has been effectively audited and meets the criteria. After 5 years of continuous compliance, companies then earn the certification of Gold Member and after 10 years, Platinum Member (GreenGlobe, 2019).

Appendix V: Ecotourist market profile

(Drumm & Moore, 2002)

Box 2.2 Who is an Ecotourist?

The International Ecotourism Society constructed the following ecotourist market profile in 1998 based on a survey of North American travelers.

Age:	Ranged from 35-54 years old, although age varied with activity and other factors such as cost.
Gender:	50% were female and 50% male, although clear differences by activity were found.
Education:	82% were college graduates. A shift in interest in ecotourism was found from those who have high levels of education to those with less education, indicating ecotourism's expansion into mainstream markets.
Household composition:	No major differences were found between general tourists and experienced ecotourists.**
Party composition:	A majority (60%) of experienced ecotourism respondents stated they prefer to travel as a couple; only 15% preferred to travel with their families and 13% preferred to travel alone.
Trip duration:	The largest group of experienced ecotourists (50%) preferred trips lasting 8-14 days.
Expenditure:	Experienced ecotourists were willing to spend more than general tourists; the largest group (26%) was prepared to spend \$1,001- \$1,500 per trip.
Important elements of trip:	Experienced ecotourists' top three responses were: (1) wilderness setting, (2) wildlife viewing, and (3) hiking/trekking. Experienced ecotourists' top two motivations for taking their next trip were: (1) enjoy scenery/nature and (2) new experiences/places.

** Experienced ecotourists = Tourists who had been on at least one "ecotourism" trip. Ecotourism was defined in this study as nature/adventure/culture oriented travel.

from Ecotourist Market Profile completed by HLA and ARA consulting firms; The International Ecotourism Society, 1998

Appendix VI: Green Key list of criteria

Pour les Gîtes et maisons d'hôtes

Gestion environnementale générale

1. Votre hébergement est-il conforme aux législations environnementales nationales et régionales ?
(agrément de la Région pour Bruxelles ou CGT pour la Wallonie, permis d'urbanisme, permis d'environnement si requis, etc.)
2. Y a-t-il une personne responsable de la gestion environnementale au sein de votre hébergement ? Cette personne peut être le/la propriétaire de l'hébergement.
3. L'hébergement a-t-il une politique environnementale formulée par écrit (déclaration environnementale) ? Ce document doit être joint au dossier de candidature.
4. L'hébergement s'est-il fixé des objectifs environnementaux et dispose-t-il d'un plan d'actions pour les atteindre ? Ce plan d'actions doit être joint au dossier de candidature.
5. Tous les éléments du dossier Clé Verte (preuves d'achats, etc.) sont-ils rassemblés dans un dossier en vue de la visite de contrôle ?
6. Mesurez-vous l'empreinte écologique de votre hébergement :
 1. Via le relevé de vos compteurs d'eau et d'énergie (électricité, gaz, mazout...) au moins une fois par mois pendant la période d'occupation (et si techniquement possible) ?
 2. Via une mesure annuelle de son empreinte carbone en utilisant un système de mesure reconnu ? Critère optionnel: Nombre de point : 2
 3. Via un audit environnemental simplifié (analyse des consommations en énergie et en eau, des principaux équipements, analyse des déplacements induits par l'activité, des intrants et déchets produits au niveau des quantités, de la toxicité, des possibilités de recyclage et réutilisation etc.). Critère optionnel: Nombre de point : 4
7. Avez-vous établi une collaboration avec des acteurs locaux sur les questions environnementales ? 2 points

Informations environnementales aux hôtes

8. Si vous êtes lauréat, afficherez-vous clairement que la Clé Verte vous a été attribuée ?
9. Si vous êtes lauréat, les hôtes auront-ils facilement accès aux informations concernant la Clé Verte (critères, contact, etc.) et les démarches de l'hébergement en matière

d'environnement, y compris sur le site web de l'hébergement (l'utilisation du logo Green Key est recommandée mais pas obligatoire) ?

10. La/les personnes chargée(s) de l'accueil est-elle capable d'informer les hôtes sur les engagements de l'hébergement en matière d'environnement ?
11. Avez-vous organisé un transport à la demande des hôtes de/vers la gare ou l'arrêt de transport en commun le plus proche ?
12. Mettez-vous à la disposition de vos hôtes (potentiels) les informations relatives à l'accessibilité multimodale de votre hébergement (carte d'accès, points d'arrêt, horaires de transport en commun et prix) ?
13. L'hébergement dispose-t-il d'une signalétique à destination des hôtes (et des employés, s'il y en a) encourageant les économies d'eau et d'énergie ? (éteindre la télévision, les lumières, le chauffage, signaler les fuites, etc.).

Gestion de l'Eau

14. Lors du remplacement des toilettes, vous engagez-vous à ce que le volume des futures chasses d'eau soit inférieur à 6 litres/chasse d'eau ou que ces toilettes possèdent un système de double chasse (3/6L) ?
15. Y a-t-il une corbeille dans chaque salle de bain ?
16. Le débit des douches dans les espaces occupés par les hôtes est-il inférieur ou égal à 9 litres par minute (pour 75% de ces douches) ?
17. Le débit des robinets/lavabos dans les espaces occupés par les hôtes est-il inférieur ou égal à 6 litres par minute (pour 75% de ces robinets) ?
18. Le propriétaire et/ou la personne s'occupant du nettoyage, le cas échéant, vérifient-ils régulièrement s'il y a des fuites au niveau des robinets et des toilettes ?
19. Lors du remplacement des lave-vaisselles, vous engagez-vous à ce qu'ils consomment au maximum 10 litres par cycle et qu'ils aient une efficacité énergétique équivalente ou supérieure au niveau A+ ?
20. Votre hébergement est-il connecté à un système d'assainissement (collectif ou autonome) permettant de traiter toutes les eaux usées en conformité avec la législation ?
21. Les produits chimiques dangereux sont-ils stockés dans des conditions ne permettant aucun dommage pour l'environnement ?

22. La piscine est-elle gérée conformément à la législation en matière de qualité de l'eau, de santé et de sécurité ?
23. Afin d'économiser l'eau de distribution, utilisez-vous d'autres sources d'approvisionnement en eau ? (eau de pluie pour alimenter les toilettes et les machines à laver, nettoyer les espaces extérieurs ou tout autre usage approprié). 2 points
24. Le débit des douches dans les espaces occupés par les hôtes est-il inférieur ou égal à 7 litres par minute (pour 75% de ces douches) ? 2 points
25. Dans les toilettes partagées (attendant au hall, au living, à la salle à manger ou à la cuisine), le débit des robinets et des chasses est-il limité à 6 litres par minute ? 1 point
26. Si vous avez une piscine, la couvrez-vous pour limiter l'évaporation ou avez-vous d'autres dispositifs pour limiter l'utilisation d'eau ? 1 point
27. Si vous avez une piscine, faites-vous des contrôles réguliers pour vérifier qu'elle n'ait pas de fuites ? 2 points
28. Avez-vous pris des dispositions particulières en faveur d'économies d'eau et d'énergie dans les services qui en utilisent beaucoup (cuisine, sauna, etc.) ? 2 points

Ménage et Nettoyage

29. Au moins 50% des produits d'entretien utilisés au quotidien sont-ils porteurs d'un écolabel reconnu au niveau national ou international ?
30. Pouvez-vous prouver que vous faites des démarches pour augmenter progressivement la part des produits éco-labellisés dans les produits que vous utilisez ?
31. Les produits de nettoyage désinfectants (ex. chlore) ne sont-ils utilisés qu'exceptionnellement et en cas d'absolue nécessité, ainsi que conformément à la législation en matière d'hygiène ?
32. Des doseurs sont-ils utilisés et la personne en charge du nettoyage est-elle sensibilisée à ne pas dépasser le dosage recommandé de détergent et de produits d'entretien indiqué sur l'emballage ou dans la description du produit ?
33. Les essuies en papier (main et visage) et le papier toilette sont-ils fabriqués en matière non-chlorée et/ou portent-ils un label écologique ?
34. Les produits utilisés dans les lave-vaisselle et les lave-linge sont-ils écolabellisés ? Critère optionnel: Nombre de point : 2
35. Le shampoing et le savon fournis au hôte sont-ils écolabellisés ? Critère optionnel: 2

points

36. Des chiffons en microfibres sont-ils utilisés afin de réduire la consommation d'eau et de produits chimiques ? 2 points

V. Gestion des déchets

37. Avez-vous mis en place un tri sélectif des déchets générés lors du séjour des hôtes respectant les règles en vigueur dans la commune (déchets à trier : papier-carton, PMC, verres, piles-batteries, organiques/biodégradables/déchets verts, huiles, déchets électriques et électroniques, cartouches d'imprimantes, déchets toxiques, fraction résiduelle...) ?
38. En particulier, les déchets et liquides dangereux (piles, ampoules fluocompactes, peintures, produits chimiques...) sont-ils stockés et traités de façon appropriées ?
39. Si l'espace le permet, les déchets organiques sont-ils compostés dans votre propriété (en dehors des déchets de jardin qui font partie d'un autre critère) ?
40. L'hébergement sensibilise-t-il les hôtes à la problématique du gaspillage alimentaire et aux façons de le réduire ?
41. Evitez-vous de mettre à disposition des hôtes de la vaisselle jetable ?
42. Limitez-vous la production de déchets en utilisant des sacs réutilisables pour vos achats et en en mettant à disposition des hôtes pour leurs achats dans la région ?
43. Veillez-vous à ce que les articles consommables fournis/offerts aux hôtes (en chambre, salle de bain ou ailleurs) ne soient pas emballés individuellement ou soient conditionnés dans des emballages réutilisables (savon, gel douche, produits cosmétiques, beurre, confiture, etc.) ?
44. Organisez-vous avec vos fournisseurs la collecte ou la récupération d'emballages (bacs ou sacs de livraison pour la nourriture et bouteilles consignée, et/ou bidons pour produits d'entretien) ?
45. Evitez-vous d'utiliser des nappes, des sets de table ou d'autres consommables jetables ?
46. L'hébergement fait-il des démarches pour utiliser plus longtemps son mobilier, ses appareils et équipements (les choisir en fonction de leur réparabilité, les faire réparer, adoucisseur d'eau pour les conserver plus longtemps ou autres) ? Critère optionnel:
Nombre de point : 4

Gestion de l'énergie

47. Les systèmes de contrôle du chauffage et de l'air conditionné, le cas échéant, sont-ils mis

en place, tenant compte des périodes de non-occupation et des changements de température extérieure ?

48. La consommation énergétique du logement est-elle réduite au maximum (pour les éclairages et équipements électriques, tels que machine à café et autres) ?
49. Au moins 50% des fenêtres dans les pièces chauffées ont-elles un niveau d'isolation équivalent à du double ou triple vitrage ou au niveau $U = 2 \text{ W/m}^2\text{K}$? Et vous engagez-vous à ce que minimum 75% de ces fenêtres endéans les 3 ans suivant la labellisation, et 100% d'entre-elles endéans les 5 ans suivant la labellisation atteignent ce niveau d'isolation?
50. Tous les échangeurs thermiques des appareils générant du chaud ou du froid sont-ils régulièrement nettoyés et les joints d'étanchéité contrôlés ? (radiateurs, réfrigérateurs, four, etc.) Les réfrigérateurs et congélateurs sont-ils dégivrés annuellement (ou plus souvent si nécessaire)?
51. Les filtres à graisse dans les hottes d'évacuation sont-ils régulièrement nettoyés ?
52. Utilisez-vous de l'énergie renouvelable ?
53. Aucun dispositif de chauffage ou de conditionnement d'air extérieur ne doit être utilisé par l'hébergement touristique.
54. Au moins 75% des ampoules dans les espaces occupés par les hôtes sont économiques. Sauf contraintes techniques (liées par exemple au fait que le bâtiment est classé), tous les luminaires allumés au moins 4 h par jours et/ou situés dans des lieux de passage doivent être économes en énergie (ou raccordés à des détecteurs de présence ou à des minuteries).
55. Votre bâtiment est-il isolé au-delà de la réglementation régionale de sorte à assurer une réduction significative de la consommation d'énergie ? Nombre de points : voir ci-dessous.
56. Avez-vous réalisé un audit externe sur l'énergie dans votre hébergement ? 8 points
57. Votre système de chauffage est-il autre qu'électrique ? 2 points
58. Existe-t-il des systèmes de récupération de chaleur (comme une chaudière à condensation) dans votre hébergement ? (Au niveau notamment des unités de chauffage, de ventilation, de la piscine ou via l'eau sanitaire usagée). 2 points
59. Produisez-vous de l'électricité à partir de votre système de chauffage (cogénération) ? 2 points
60. 90 % au moins des ampoules de l'hébergement sont-elles économes en énergie ? 2 points
61. L'éclairage extérieur et dans les lieux de passage (tels que hall et corridors) est-il réduit au strict minimum ou connecté à des détecteurs de mouvement /crépusculaires ? 2 point
62. Vos équipements et appareils électriques (et utilisés dans les chambres, cuisines,

- buanderies, etc., y compris les frigos et autres appareils de refroidissement) sont-ils efficaces d'un point de vue énergétique (au minimum classe A et A+++ pour les appareils de refroidissement) ? 2 points
63. Les ordinateurs et appareils de bureau nouvellement acquis sont-ils munis d'un dispositif d'économie d'énergie et s'éteignent-ils automatiquement ? Critère optionnel: Nombre de point : 2
64. Les ordinateurs et appareils de bureau nouvellement acquis ont-ils un écolabel ou sont-ils produits par une société ayant un système de gestion environnementale ? Critère optionnel: Nombre de point : 2
65. Les tuyaux d'approvisionnement en eau chaude sont-ils isolés ? 2 points
66. L'hébergement propose-t'il aux hôtes de façon régulière au moins 8 types de produits labellisés bio ou équitables (fair-trade)?
67. L'hébergement peut-il prouver que le pourcentage global de produits bio, locaux ou équitables qu'il propose aux hôtes augmente chaque année ? Et si ce n'est pas le cas, peut-il en expliquer la raison ?
68. L'hébergement évite-t'il de proposer aux hôtes des poissons figurant sur la "liste rouge" ou d'autres espèces protégées ?
69. L'hébergement propose-t'il à ses hôtes des légumes ou fruits de saison, et ceux-ci sont-ils mis en valeur sur la carte afin que les hôtes puissent aisément les choisir ?
70. L'hébergement communique-t'il sur le fait qu'il propose aux hôtes une alimentation durable et les personnes en contact avec les hôtes (dans les lieux où la nourriture et les boissons sont proposées) peut-il les renseigner à ce sujet - voir explications dans manuel ?
71. A partir d'un choix de 5 plats sur la carte, l'hébergement propose-t'il aux hôtes systématiquement une option végétarienne parmi ceux-ci ? Si moins de 5 plats, peut-il proposer un plat végétarien sur demande ?
72. Lorsque elle est de qualité suffisante, proposez-vous à vos hôtes de l'eau du robinet pour la consommation (éventuellement filtrée) ?
73. L'hébergement atteint-il en valeur monétaire au moins 25% de produits labellisés bio sur la valeur totale dépensée en achats de produits alimentaires/boissons pour les hôtes ? Critère optionnel: Nombre de point : 6
74. L'hébergement atteint-il en valeur monétaire au moins 10% s'il n'y a pas de salles de réunion (et au moins 15 % s'il y a des salles de réunion) de produits labellisés équitables sur la valeur totale dépensée en achats de produits alimentaires/boissons pour les hôtes ?

Critère optionnel: Nombre de point : 4

75. Pour les aliments non transformés si ce n'est par le producteur lui-même (tels que les fruits, légumes, miel, fromage, etc.) et proposés aux hôtes, l'hébergement peut-il prouver qu'une partie des achats se fait directement chez un producteur Belge ? Critère optionnel: Nombre de point : 4
76. Critère optionnel : L'hébergement propose-t'il à ses hôtes : des poissons peu connus (2 points)
77. L'hébergement propose-t'il à ses hôtes des légumes oubliés ? Critère optionnel: Nombre de point : 2
78. L'hébergement obtient-il au minimum 2 points sur la liste des mesures de lutte contre le gaspillage alimentaire (voir manuel explicatif). Critère optionnel: Nombre de point : 4
79. Proposez-vous à vos hôtes de la documentation et des informations sur les espaces naturels à proximité de l'hébergement ? (réserves naturelles et parcs naturels, paysages remarquables, mesures de conservation de la nature)
80. Informez-vous les hôtes sur les points de location de bicyclettes situés à proximité de votre hébergement (s'il y en a)?
81. Avez-vous un moyen d'évaluer la satisfaction des hôtes par rapport aux actions environnementales et éventuellement aux performances socio-économiques de l'hébergement ? (questionnaire de satisfaction, lien à partir de la page d'accueil du site)
82. Contribuez-vous au développement des activités environnement-nature dans votre région (soutien financier d'associations) ? 2 points
83. Proposez-vous des activités à destination des hôtes sur le thème du développement durable, de la nature, de l'environnement ? 4 points
84. Proposez-vous la location ou le prêt de bicyclettes au sein de l'hébergement ? 6 points
85. Avez-vous reçu le label "Bienvenue Vélo" ? 4 points
86. Informez-vous les hôtes sur les zones de baignades, ports de plaisance et propriétaires/gestionnaires de bateaux labellisés Pavillon Bleu situés à proximité ou dans la région? 2 points

Administration – Bureau

87. Les produits d'édition et la papeterie relèvent-ils d'une démarche écologique (papier blanchi sans chlore et au minimum soit portant un label écologique, soit 100% recyclés ou fabriqués par une entreprise ayant une démarche environnementale certifiée)?

88. Les produits offerts aux hôtes, le cas échéant (comme le savons ou des cosmétiques) sont-ils écolabellisés (ou labellisés bio) ?
89. Avez-vous favorisé la correspondance électronique plutôt que l'envoi de brochures et favorisez-vous l'utilisation du recto-verso ? 1 point
90. Diminuez-vous les quantités de papier utilisées dans les chambres, bureaux et éventuelles salles de réunion ? Critère optionnel: Nombre de points : 2
91. L'hébergement choisit-il (pour 75 % de ses achats) des produits et services locaux ou équitables (Fair Trade) ? Critère optionnel: Nombre de point : 2
92. Lors du remplacement des biens durables (serviettes, draps, alèses), vous engagez-vous à ce qu'ils portent un label écologique ou qu'ils soient distribués par une société ayant une démarche environnementale ? 2 points
93. Appliquez-vous à titre privé les mêmes principes de gestion environnementale que ce qui est pratiqué dans votre hébergement (réduction de la consommation d'eau, d'énergie, mobilité plus durable pour les propriétaires et les éventuels employés) ? 4 points

Environnement extérieur

94. Le propriétaire de l'hébergement évite-t-il d'utiliser des substances polluantes dans son hébergement, (peinture au plomb, insecticides, désodorisants chimiques) ?
95. Lors des travaux de décoration, rénovation ou de construction d'un nouveau bâtiment

Espaces verts

96. Les pesticides et engrais chimiques ne sont-ils utilisés qu'en cas d'absence de techniques alternatives et en respectant les dosages prescrits ?
97. Les espaces verts de l'hébergement sont-ils exempts d'espèces exotiques invasives et l'hébergement participe-t-il aux plans de lutte régionaux en la matière ?
98. Récupérez-vous l'eau de pluie pour l'arrosage des fleurs et des jardins ?
99. Les déchets du jardin sont-ils compostés ?
100. Prenez-vous d'autres dispositions en faveur de la biodiversité ? Nombre de points variable selon l'action

Responsabilité sociétale

101. L'hébergement a-t-il une politique en matière de responsabilité sociétale ?
102. S'il ont des employés, les propriétaires de l'hébergement applique-t-il les principes d'égalité

des chances (par rapport aux femmes et minorités locales), y compris pour l'accès à des postes de direction, et n'emploie pas des enfants (ou ne fait pas appel à des sous-traitants qui emploient des enfants) ?

103. L'hébergement ne met pas en vente, ne participe pas au commerce de- et n'exhibe ni plantes, ni animaux, ni objets historiques ou archéologiques, sauf si c'est autorisé par la loi.
104. L'hébergement est-il aménagé pour que les personnes (au niveau des hôtes et du personnel, le cas échéant) ayant des besoins spécifiques (en matière de mobilité ou de santé) y aient accès ? Critère optionnel: Nombre de point : 4
105. L'hébergement soutient-il des activités environnementales ou sociales au niveau local ? Critère optionnel: Nombre de point : 2
106. L'hébergement offre-il la possibilité à des petits entrepreneurs de développer et vendre des produits durables qui sont basés sur la nature, la culture et l'histoire locale ? Critère optionnel: Nombre de point : 2
107. Au cas où des activités sont organisées avec une / des communautés locales, un code de conduite développé en concertation avec ces communautés est-il appliqué ? Critère optionnel: Nombre de point : 2
108. Des fournitures, équipements ou matériaux non-utilisés dans le cadre de l'hébergement ont-ils été donnés à des organisations caritatives (au cours de 12 derniers mois) ? Critère optionnel: Nombre de point : 2

Les critères pour les hôtels sont relativement semblables aux critères ci-dessus. Certaines variations sont présentes étant donné la différence de structure possible. Ceux-ci sont disponibles sur le site internet du label.

c) Establishments in Liège

Hotel - Rental Accomodation - Bed & Breakfast		Hotel Le midi	Hotel Naxhelet	Park Inn	Silva Hotel	Val d'Armont	Villa des fleurs	Gît de Neudempt	Gîte Azymluth	Gîte d'étape des hautes fagnes	La poudreffe	Le bonheur au bout du pré	Moulin Castal de Holoigne-sur-Geer	Villa Bocage	Camarine	La couette de fours	Quétude champêtre	Western City
Price/night/person		32,50 €	70,00 €	46,00 €	66,00 €	47,00 €	60,00 €	12,50 €	31,29 €	20,00 €	22,67 €	23,75 €	14,90 €	50,00 €	40,00 €	85,00 €	48,00 €	48,00 €
TOTAL SCORE		16	11	18	20	22	21	10	19	21	5	14	15	23	10	9	19	20
I. ENVIRONMENT		11	7	12	14	16	14	8	16	13	4	9	12	18	8	6	15	15
1. Water		3	1	3	3	3	2	2	3	1	0	3	2	5	1	0	3	3
Taps with reduced debit				1	1	1	1		1			1		1	1			
Double flux flush or composting toilet				1	1	1	1		1			1	1	1	1		1	1
Monthly water consumption transcript				1	1	1	1		1			1	1	1	1		1	1
Rainwater recuperator				1	1	1	1		1			1		1	1		1	1
Rain water use for sanitariles				1	1	1	1		1			1		1	1		1	1
Water treatment plant for the property				1	1	1	1		1			1		1	1		1	1
2. Energy		5	2	4	5	6	6	3	7	6	0	1	6	7	3	0	6	6
Monthly gaz consumption transcript				1	1	1	1		1			1	1	1	1		1	1
Low consumption light bulbs				1	1	1	1		1			1	1	1	1		1	1
Low consumption electrical appliances				1	1	1	1		1			1	1	1	1		1	1
Timers/Person detectors for lighting in common spaces				1	1	1	1		1			1	1	1	1		1	1
Performant insulation				1	1	1	1		1			1	1	1	1		1	1
Heating from renewable energies (wood, pellets, solar...)				1	1	1	1		1			1	1	1	1		1	1
No air conditioning				1	1	1	1		1			1	1	1	1		1	1
Min 50% of all electricity generated by renewable energies				1	1	1	1		1			1	1	1	1		1	1
Passive building				1	1	1	1		1			1	1	1	1		1	1
3. Waste		1	1	3	4	3	3	2	2	1	1	2	2	2	0	1	2	3
Waste sorting				1	1	1	1		1			1	1	1	1		1	1
Sorting guide next to bins				1	1	1	1		1			1	1	1	1		1	1
No individually packaged portions for breakfast				1	1	1	1		1			1	1	1	1		1	1
Rechargeable toiletry items				1	1	1	1		1			1	1	1	1		1	1
Composting				2	3	2	4	3	1	4	5	3	1	4	3	4	4	4
4. Natural Environment		2	3	2	2	4	3	1	4	1	1	1	1	1	1	1	1	1
Natural or ecolabeled cleaning products				1	1	1	1		1			1	1	1	1	1	1	1
Natural (or environmentally friendly) building materials				1	1	1	1		1			1	1	1	1	1	1	1
Building materials respectful of region's architectural style				1	1	1	1		1			1	1	1	1	1	1	1
Actions for biodiversity preservation in exterior areas				1	1	1	1		1			1	1	1	1	1	1	1
Access possible by green modes of transportation				1	1	1	1		1			1	1	1	1	1	1	1
Favour soft hiking options				1	1	1	1		1			1	1	1	1	1	1	1
Noise pollution calculation				1	1	1	1		1			1	1	1	1	1	1	1
5. Cultural Environment		0	0	0	0	0	0	0	0	0	0	0	1	0	1	1	0	0
Valorisation of cultural heritage				1	1	1	1		1			1	1	1	1	1	1	1
III. SOCIAL		4	0	5	5	4	5	0	3	6	0	2	3	4	0	1	2	4
1. Client Awareness		2	0	2	2	1	2	0	2	2	0	2	2	2	0	1	1	1
Client informed on energy savings				1	1	1	1		1			1	1	1	1		1	1
Client informed on correct use of electrical appliances				1	1	1	1		1			1	1	1	1		1	1
Client informed on sustainable development approach				1	1	1	1		1			1	1	1	1		1	1
Direct contact with exterior due to building's architecture				1	1	1	1		1			1	1	1	1		1	1
2. Staff Awareness		1	1	1	1	1	1		1			1	1	1	1		1	1
Staff participates to sustainable development approach				1	1	1	1		1			1	1	1	1		1	1
3. Tourism for All		1	1	1	1	1	1		1			1	1	1	1		1	1
Reduced mobility access				1	1	1	1		1			1	1	1	1		1	1
Payment options & help for families and less advantaged				1	1	1	1		1			1	1	1	1		1	1
Reception in foreign languages				1	1	1	1		1			1	1	1	1		1	1
4. Landscape study of the building		1	1	1	1	1	1		1			1	1	1	1		1	1
III. DEVELOPEMENT ECONOMIQUE		1	4	1	1	2	2	2	0	2	1	3	0	1	2	2	2	1
1. Local suppliers		1	2	1	0	1	1	2	0	1	1	2	0	0	2	2	1	1
Support local producers				1	1	1	1	1	1			1	1	1	1	1	1	1
Support for local shop owners				1	1	1	1	1	1			1	1	1	1	1	1	1
2. Building Construction				1	1	1	1	1	1			1	1	1	1		1	1
Local artisans &/or local building materials				1	1	1	1	1	1			1	1	1	1		1	1
3. Support of Employment		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Support employment of people in special situations				1	1	1	1	1	1			1	1	1	1		1	1
PFI contracts				1	1	1	1	1	1			1	1	1	1		1	1
4. Direct/Indirect Employment		0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Indirect local employment created				1	1	1	1	1	1			1	1	1	1		1	1
Direct full time equivalent created				1	1	1	1	1	1			1	1	1	1		1	1
Accepts Eco-cheques				1	1	1	1	1	1			1	1	1	1		1	1

d) Establishments in the Walloon Brabant

Hotel - Rental Accomodation - Bed & Breakfast	Martin's Chateau du Lac	Martin's Grand Hotel	Martin's Manoir	Martin's Waterloo	Au pont d'Arcole	Les 3 Fontaines	Manoir de Thoremals
Price/night/person	52,50 €	52,50 €	50,00 €	50,00 €	37,50 €	37,50 €	42,50 €
TOTAL SCORE	17	17	17	17	8	13	10
I. ENVIRONMENT	9	9	9	9	5	9	5
1. Water	3	3	3	3	0	2	0
Taps with reduced debit	1	1	1	1			
Double flux flush or composting toilet	1	1	1	1		1	
Monthly water consumption transcript							
Rainwater recuperator	1	1	1	1		1	
Rain water use for sanitarities							
Water treatment plant for the property							
2. Energy	3	3	3	3	1	3	1
Monthly gaz consumption transcript							
Low consumption light bulbs	1	1	1	1		1	
Low consumption electrical appliances						1	
Timers/Person detectors for lighting in common spaces							
Performant insulation							1
Heating from renewable energies (wood, pellets, solar...)	1	1	1	1		1	
No air conditionning							
Min 50% of all electricity generated by renewable energies	1	1	1	1	1		
Passive building							
3. Waste	1	1	1	1	0	1	2
Waste sorting	1	1	1	1		1	1
Sorting guide next to bins							
No individually packaged portions for breakfast							
Rechargeable toileterry items							
Composting							1
4. Natural Environment	2	2	2	2	4	3	2
Natural or ecolabeled cleaning products	1	1	1	1		1	
Natural (or environmentally friendly) building materials					1		
Building materials respectful of region's architectural style					1		
Actions for biodiversity preservation in exterior areas						1	1
Access possible by green modes of transportation	1	1	1	1	1	1	1
Favour soft hiking options					1		
Noise pollution calculation							
5. Cultural Environment	0	0	0	0	0	0	0
Valorisation of cultural heritage							
II. SOCIAL	5	5	5	5	2	1	2
1. Client Awareness	3	3	3	3	1	1	2
Client informed on energy savings	1	1	1	1	1		1
Client informed on correct use of electrical appliances	1	1	1	1			
Client informed on sustainable development approach	1	1	1	1		1	1
Direct contact with exterior due to building's architecture							
2. Staff Awareness	1	1	1	1			
Staff participates to sustaniable development approach	1	1	1	1			
3. Tourism for All	1	1	1	1	0	0	0
Reduced mobility access	1	1	1	1			
Payment options & help for families and less advantaged							
Reception in foreign languages							
4. Landscape study of the building					1		
III. DEVELOPPEMENT ECONOMIQUE	3	3	3	3	1	3	3
1. Local suppliers	1	1	1	1	1	2	2
Support local producers	1	1	1	1	1	1	1
Support for local shop owners						1	1
2. Building Construction							1
Local artisans &/or local building materials							1
3. Support of Employment	0	0	0	0	0	0	0
Support employment of people in special situations							
PFI ocntracts							
4. Direct/Indirect Employment	2	2	2	2	0	1	0
Indirect local employment created	1	1	1	1			
Direct full time equivalent created	1	1	1	1		1	
Accepts Eco-cheques							

e) Establishments in Namur

Hotel - Rental Accommodation - Bed & Breakfast	Ferme chateau de Dourbes	Ferme rouge	La grange d'Ychippe	Au fil des champs
Price/night/person	50,00 €	32,08 €	20,23 €	32,50 €
TOTAL SCORE	24	19	30	20
I. ENVIRONMENT	19	15	20	14
1. Water	4	3	4	1
Taps with reduced debit	1	1	1	
Double flux flush or composting toilet	1	1	1	
Monthly water consumption transcript	1		1	
Rainwater recuperator	1	1	1	1
Rain water use for sanitarries				
Water treatment plant for the property				
2. Energy	8	6	7	5
Monthly gaz consumption transcript	1		1	
Low consumption light bulbs	1	1	1	1
Low consumption electrical appliances	1	1	1	1
Timers/Person detectors for lighting in common spaces	1		1	
Performant insulation	1	1	1	1
Heating from renewable energies (wood, pellets, solar..)	1	1		1
No air conditionning	1	1	1	1
Min 50% of all electricity generated by renewable energies	1	1	1	
Passive building				
3. Waste	2	2	4	3
Waste sorting	1	1	1	1
Sorting guide next to bins	1	1	1	1
No individually packaged portions for breakfast				1
Rechargeable toiletry items			1	
Composting			1	
4. Natural Environment	4	4	5	4
Natural or ecolabeled cleaning products	1	1	1	1
Natural (or environmentally friendly) building materials	1	1	1	1
Building materials respectful of region's architectural style	1	1	1	1
Actions for biodiversity preservation in exterior areas	1	1	1	1
Access possible by green modes of transportation			1	
Favour soft hiking options				
Noise pollution calculation				
5. Cultural Environment	1	0	0	1
Valorisation of cultural heritage	1			1
II. SOCIAL	4	3	5	4
1. Client Awareness	2	1	3	2
Client informed on energy savings	1	1	1	1
Client informed on correct use of electrical appliances	1		1	1
Client informed on sustainable development approach			1	
Direct contact with exterior due to building's architecture				
2. Staff Awareness		1		
Staff participates to sustainable development approach		1		
3. Tourism for All	2	1	2	2
Reduced mobility access	1			1
Payment options & help for families and less advantaged			1	
Reception in foreign languages	1	1	1	1
4. Landscape study of the building				
III. DEVELOPPEMENT ECONOMIQUE	1	1	4	2
1. Local suppliers	0	0	1	1
Support local producers			1	1
Support for local shop owners				
2. Building Construction	1	1	1	1
Local artisans &/or local building materials	1	1	1	1
3. Support of Employment	0	0	1	0
Support employment of people in special situations			1	
PFI contracts				
4. Direct/Indirect Employment	0	0	1	0
Indirect local employment created			1	
Direct full time equivalent created				
Accepts Eco-cheques			1	

f) Average per province

Province	Nb. of establishments	Price Average	Score average (/45)
Luxembourg	23	29,17 €	15,6
Hainaut	21	39,13 €	17,5
Liège	17	42,21 €	16,1
WB	7	46,07 €	14,1
Namur	4	33,70 €	23,3
Overall	72	37,05 €	16,5

- of scores

Province	Total Average	Environment (/28)		Social (/9)		Economic Development (/7)		EcoCheque
	(Nb)	(Nb)	(%)	(Nb)	(%)	(Nb)	(%)	
Luxembourg	15,6	11,74	42%	2,26	25%	1,57	22%	0
Hainaut	17,5	12,48	45%	3,05	34%	1,86	27%	2
Liège	16,1	11,65	42%	2,82	31%	1,59	23%	0
BW	14,1	7,86	28%	3,57	40%	2,71	39%	0
Namur	23,3	17,00	61%	4,00	44%	2,00	29%	0
Overall	16,5	11,85	42%	2,85	32%	1,79	26%	2

- of prices

Province	Prices (per person per night)		
	Average	Min	Max
Luxembourg	29,17 €	10,00 €	60,00 €
Hainaut	39,13 €	13,33 €	100,00 €
Liège	42,21 €	12,50 €	85,00 €
BW	46,07 €	37,50 €	52,50 €
Namur	33,70 €	20,23 €	50,00 €
Overall	37,05 €	10,00 €	100,00 €

- of number of establishments

Province	Type of Establishment			Ecotourism Total	Province Total	Proportion of Ecotourism/Total establishments
	Hotel	Rental Accommodation	B&B			
Luxembourg	0	17	6	23	1170	1,97%
Hainaut	3	12	6	21	455	4,62%
Liège	7	7	4	18	867	2,08%
BW	4	0	3	7	125	5,60%
Namur		3	1	4	738	0,54%
Overall	14	39	20	73	3355	2,18%
Wallonia Total	232		2944			
Proportion of Ecotourism/Total Establishments	6,03%		2,00%			

g) Detail of scores

- per province:

Province	Average scores per pillar	Average scores per category				
	I. ENVIRONMENT (/28)	1. Water (/6)	2. Energy (/9)	3. Waste (/5)	4. Natural Environment (/7)	5. Cultural Environment
Luxembourg	11,74	2,30	3,78	1,83	3,48	8
Hainaut	12,48	2,76	4,05	2,10	3,57	0
Liège	11,65	2,24	4,24	1,94	3,06	3
WB	7,86	2,00	2,43	1,00	2,43	0
Namur	17,00	3,00	6,50	2,75	4,25	2
Overall	11,85	2,43	3,99	1,90	3,35	13
						(Sum per province)
	II. SOCIAL (/9)	1. Client Awareness (/4)	2. Staff Awareness	3. Tourism for All (/3)	4. Landscape study of the building	
Luxembourg	2,26	1,09	3	1,00	1	
Hainaut	3,05	1,43	5	1,24	3	
Liège	2,82	1,29	6	1,18		
WB	3,57	2,29	4	0,57	1	
Namur	4,00	2,00	1	1,75		
Overall	2,85	1,40	19	1,11	5	
			(Sum per province)	(Sum per province)	(Sum per province)	
	III. ECONOMIC (/7)	1. Local suppliers (/2)	2. Building Construction	3. Support of Local Employment	4. Direct/Indirect Employment	
Luxembourg	1,57	1,17	11	1	2	
Hainaut	1,86	1,05	9	3	3	
Liège	1,59	0,88	7	0	2	
WB	2,71	1,29	1	0	9	
Namur	2,00	0,50	4	1	1	
Overall	1,79	1,00	32	5	17	
			(Sum per province)	(Sum per province)	(Sum per province)	
	Accepts EcoCheques					
Luxembourg	0					
Hainaut	2					
Liège	0					
WB	0					
Namur	1					
Overall	3					
	(Sum per province)					

- per level of implication:

I. Environment (/28)	1. Water (/6)	2. Energy (/9)	3. Waste (/5)	4. Natural Environment (/7)	5. Cultural Environment (/1)	Total	
	0 13	0 5	0 8	0 0	0 59	No implication	6,5 9%
	1 or 2 19	1 to 3 29	1 or 2 43	1 or 2 20	1 13	Minimum implication	28 39%
min 2	3 or 4 32	4 to 6 28	3 or 4 21	3, 4 or 5 50		Average implication	33 45%
max 21	5 or 6 8	7 to 9 10	5 0	6 or 7 2		Maximum implication	5 7%
total:	72	72	72	72	72		72 100%
II. Social (/9)	1. Client Awareness (/4)	2. Personnel Awareness (/1)	3. Tourism for all (/3)	4. Landscape study (/1)	Total		
	0 19	0 53	0 26	0 67	No implication	32,7 45%	
	1 16	1 19	1 21	1 5	Minimum implication	18,7 26%	
min 0	2 or 3 37		2 16		Average implication	17,7 25%	
max 6	4 0		3 9		Maximum implication	3 4%	
total:	72	72	72	72	72	100%	
III. Economic Development (/7)	1. Local Suppliers (/2)	2. Construction (/1)	3. Support of Employment (/2)	4. Direct/Indirect Employment created			
	0 17	0 40	0 68	0 55			
min 0	1 35	1 32	1 3	1 17			
max 4	2 20		2 1				
total:	72	72	72	72			

Key:

Score

Nb of Establishments

Key:	Score
	Nb of Establishments

- Per price category

Price Categories	Total Average		Environment		Social		Economic	
	(/45)	(%)	(/28)	(%)	(/9)	(%)	(/7)	(%)
€ 10-16	15,09	34%	11,82	42%	1,91	21%	1,36	19%
€ 17-22	14,40	32%	9,70	35%	2,90	32%	1,70	24%
€ 23-32	14,70	33%	11,60	41%	1,70	19%	1,40	20%
€33-38	14,10	31%	9,60	34%	2,40	27%	2,10	30%
€ 38-47	19,70	44%	14,10	50%	3,50	39%	2,00	29%
€48-54	20,40	45%	13,90	50%	4,50	50%	2,00	29%
€55-100	17,27	38%	12,18	44%	3,09	34%	2,00	29%

Appendix VIII: The Utopia Hotel

(Utopia, 2019)



Appendix IX : The Grange d'Ychippe
(La Grange d'Ychippe, 2019)



Appendix X : Questionnaire

Prise de contact

1. Pouvez-vous vous présenter en quelques mots ainsi que nous expliquer votre rôle au sein de l'établissement ?
2. Pouvez-vous nous expliquer brièvement ce projet d'hébergement ?
3. Pourquoi avoir construit un hébergement de la sorte ?

• Volet écologique

1. En termes d'écologie, quelle est la philosophie de cet établissement ?
2. Etes-vous labélisé par un organisme écotouristique (clé verte, green globe, Ecolabel de l'UE) ? Si oui/non, pourquoi (pas) ?
3. Au niveau du patrimoine culturel local,
 - Quels sont les moyens mis en oeuvre pour le *préserver* ?
 - Quels sont les moyens mis en oeuvre pour le *restaurer* ?
4. Quels moyens ont été mis en oeuvre pour préserver l'environnement naturel lors de la construction de l'établissement ?
5. Avez-vous dû respecter certaines réglementations belges ou européennes spécifiques dans la construction, localisation et gestion de votre nouvel hôtel ?
6. D'où proviennent les matériaux utilisés pour la construction ? Technologies de construction particulières ?
7. Quels sont les moyens mis en oeuvre pour préserver l'environnement naturel dans la gestion quotidienne de l'établissement ?
 - Avez- vous réalisé une analyse de l'impact sur l'environnement naturel ?
 - Quelles sont vos sources d'énergie principales pour l'hôtel ?
 - Avez-vous des politiques de gestion de déchet (recyclage), (ré)utilisation d'eau, ...
8. Pouvez-vous nous donner une approximation de l'empreinte carbone annuelle de cet établissement ?
9. Calculez-vous la pollution sonore de cet établissement ?
10. Pensez-vous avoir une influence positive sur la conscience écologique de vos hôtes ? Pensez-vous les sensibiliser à l'environnement ? Si oui, de quelle manière ?

11. Au niveau de la restauration, dans quelle mesure vous approvisionnez-vous chez des fournisseurs locaux ?

• **Volet social**

12. Quelles autres entités ont participé ou se sont opposées au développement de ce projet?
13. De quelle manière les riverains ont été inclus dans le développement de ce projet ? Et les institutions locales, telles que la commune ou la province ?
14. D'autres entités ont-elles eu un impact considérable sur l'aboutissement de ce projet ?
15. En ce qui concerne les riverains et population locale, quels impacts pensez-vous avoir sur leurs conditions de vies en ouvrant ce nouvel établissement?
16. Selon vous, quels sont les impacts positifs et négatifs d'un tel projet sur la population riveraine ? Au niveau économique, culturel...
17. Comment qualifieriez-vous vos échanges avec la population locale?
18. Quel est le taux d'employés provenant de la région?
19. Pensez-vous avoir une influence positive sur la conscience écologique des habitants de la région ?
20. Pensez-vous valoriser le patrimoine culturel de votre région/pays ? Si oui, comment ?

• **Volet économique**

21. Selon vous, les hébergements créés vont-il contribuer au développement économique de la région ?
22. Selon vous, les hébergements créés vont-ils créer de l'emploi dans la région ?
23. En construisant ces nouveaux hébergements, pensez-vous poursuivre d'autres objectifs en plus d'un objectif économique ?
24. Avez-vous établi une stratégie marketing spécifique ? Si oui, pouvez-vous nous en dire un peu plus ?
25. Comment évaluez-vous la satisfaction de vos clients?
26. Êtes-vous satisfaits du comportement de vos clients durant leur séjour ?

Conclusion

27. Quelle est votre vision long terme pour cet établissement ?
28. Quelles améliorations ou agrandissements sont prévus dans les prochaines années ?

Appendix XI: Interview Summaries

A. Valérie Nagant - La Grange d'Ychippe

Pouvez-vous vous présenter en quelques mots ainsi que nous expliquer votre rôle au sein de la Grange d'Ychippe ? Ainsi que comment vous avez décidé de vous lancer dans ce projet ?

Nous avons acheté le gîte en juillet 2012. On a commencé directement les locations dès qu'on est arrivé sur place. L'été s'est très bien passé. Et puis les mois froids sont arrivés et on a assez vite été dégoûtés par le comportement des gîteurs qui venaient chez nous. Pour plusieurs raisons, la première est qu'ils venaient avec énormément de voitures. On a un petit parking de 4-5 places maximum et des fois on en avait 8 ou 10 pour des groupes de 12 personnes. On avait énormément de poubelles tout venant et PMC et énormément de restes de nourriture qu'ils laissaient sur place. Le chauffage était aussi mis à fond avec les fenêtres ouvertes pendant que les gîteurs partaient en excursion. On s'est dit on ne peut pas continuer comme ça. On a un peu réfléchi à la question et si nous on a un comportement écologique que ça puisse être transposé au gîte et donc on a souscrit au label clé verte. Le label clé verte je le connaissais via mon boulot parce que je m'occupais de l'agrément des chambres d'hôtes à Bruxelles et également de l'accompagnement des familles qui souhaitent se lancer dans ce label. Et donc je me suis dit que la meilleure solution pour mieux connaître ce label pour mon boulot c'est de le faire aussi chez moi et en même temps ça peut peut être aussi aider pour changer un peu le comportement des clients.

Avez-vous remarqué une évolution par rapport au comportement du client au fur et à mesure des années ?

Oui très très vite. Ce qu'on fait qui est très important c'est qu'on envoie un mail au moins une semaine avant leur arrivée pour leur expliquer un peu la situation. On leur explique par exemple qu'on est pas raccordé aux égouts et qu'on a un lagunage dans le jardin et donc nous souhaitons de ne pas avoir de produits toxiques et nous invitons les gens qui ont des courses à faire pour ce séjour à acheter des produits de soin et d'hygiène écologique et que s'ils ne savent pas quoi acheter on peut leur préparer un écosac. On leur dit aussi que nous avons un parking de 4-5 voitures maximum et qu'ils peuvent faire du covoiturage et qu'ils peuvent aussi venir en train et qu'on vienne les chercher. On leur dit également que s'ils ont des bébés ou des enfants, on a énormément de matériel au gîte et qu'ils n'ont pas besoin d'apporter le leur pour désencombrer les coffres. Et ça a très très vite marché au niveau du parking c'est vraiment génial. Au niveau du tri des déchets, on a mis en place le tri habituel mais on est allé un peu plus loin avec le tri des bouchons parce que j'ai remarqué que les bouchons en plastique ou en métal très souvent ça se retrouve dans la poubelle tout venant

et pas dans les poubelles de tri. Donc on a mis en place des petits pots et on récupère les bouchons en plastique pour une association et les bouchons de liège pour la déchetterie. Et ceux en métal après je les remets dans le PMC mais au moins je suis sûre que ça va dans la bonne poubelle. On récupère aussi les langes de bébé pour le composte de ville et on fait le composte dans le jardin pour tout ce qui est alimentaire et de restes de nourriture pour les poules. J'indique bien au gens de pas jeter de restes alimentaires dans la poubelle pour être sûre que ça soit bien récupérer d'une façon ou d'une autre mais surtout pour que les poubelles ne soient pas détruites par les animaux sauvages. Au niveau du chauffage, on a mis en place dans chaque chambre un petit mot. C'est une incitation indirecte à agir plus raisonnablement, comme par exemple bien fermer le chauffage avant d'ouvrir la fenêtre ou ce genre de choses-là. Depuis cela va beaucoup mieux à tout point de vue, au niveau des déchets, chauffage et voitures.

Combien de lits comptez-vous dans votre gîte ?

On peut accueillir jusqu'à 12 personnes. [...]

Par rapport au Label Clé Verte, quand l'avez vous obtenu ?

On est arrivé en 2012 donc on l'a mis en place vers fin 2013 début 2014, je pense.

Etes vous satisfaite des critères demandés pour obtenir ce label ? Avez-vous un avis sur le fait que certains hôtels de grosses chaînes ont aussi ce label bien qu'ils ne semblent pas s'inscrire dans une démarche écotouriste globale ?

Oui oui j'ai un avis. Moi j'ai fait un peu le tour des labels qui existaient et par rapport à ma petite structure, j'ai pris le label clé verte d'abord parce qu'il ne nécessite pas d'avoir une maison qui soit passive ou écologique dès le départ. Ça permettait en fait d'évoluer chaque année. Il y a aussi un auditeur indépendant qui passe toutes les X années pour voir comment on se débrouille on ce qu'on a fait. Ce qui est bien aussi c'est qu'on évolue chaque année, je n'ai pas de budget en dehors de celui de ma famille pour avancer là-dedans donc c'est en fonction un peu de chacune de mes actions que je mets en place que j'évolue. Au niveau des hôtels, dans le cadre de mon boulot, on a visité avec la clé verte l'intérieur de plusieurs hôtels et même si c'est une manière de se mettre en avant, je pense qu'ils font réellement, pas seulement des efforts des économies et des progrès. Moi j'ai vu des choses très intéressantes. Par exemple il y a un hôtel qui avait une salle de sport et bien ils avaient réglé toutes les machines pour créer de l'électricité par exemple. Maintenant, s'il y en a qui se contente du minimum c'est possible mais je ne vois pas comment ils peuvent continuer à avoir le label chaque année s'ils n'évoluent pas quoi parce qu'il y a quand même une évolution à montrer

chaque année. Ceci dit le fait de faire le label la première ou la deuxième année c'est déjà à la base ce que tous les hébergements et horeca devraient faire quoi. Pour moi c'est essentiel et c'est plus économique pour eux aussi, surtout pour des grosses structures. C'est moins le cas pour moi évidemment. Si je dois faire des petits achats pour des lampes LED ça me coûte un pont et elles ne sont pas toujours de bonne qualité mais ça veut dire un investissement. Pour un hôtel c'est d'autant plus rentable que pour une petite structure.

Votre établissement nous a été recommandé par Mme Drothier de chez Ardenne Ecotourisme, qui demande aussi un certain nombre de critères, pouvez vous donner votre avis sur la différence de leurs critères et ceux du label Clé Verte ?

J'ai été une des toutes premières alors ils ont testé leur audit chez moi. C'est moins professionnel comme démarche même s'ils veulent le faire correctement, Eux m'ont donné des conseils que clé verte ne m'a pas donné en direct. Ce que j'admire dans la démarche Marque Ardenne et c'est pour ça que j'y adhère c'est qui forme un club une forme de réseautage une communauté de gens qui vont s'y mettre et qu'ils mettent à côté de ça des actions pour pouvoir aller plus loin ou échanger les bonnes pratiques ou propose des formations qui sont souvent gratuites ou très abordables. Clé verte n'est pas du tout soutenu par les pouvoirs politiques ce qui fait qu'il y a juste Marie Spaey chez Inter Environnement qui consacre quelques heures par mois à la clé verte et donc elle ne peut pas beaucoup avancer là-dessus. Donc on vient de lancer maintenant il y a quelque mois un groupe Facebook d'échange de bonnes pratiques mais ça démarre tout doucement. Donc la Marque Ardenne c'était important pour moi d'avoir ce réseau pour d'abord ne pas me sentir toute seule. Parce que quand on est dans un projet dans lequel chaque année il faut évoluer moi à un moment je n'ai plus d'idées et donc je gratte sur internet pour voir ce que font les autres structures en Europe et même en dehors et à un moment on ne sait plus très bien quoi inventer. Je n'ai pas forcément le budget pour faire les travaux d'une grosse modification.

Pour résumer, c'est un petit peu une limite du label clé verte, après quelques années on arrive au bout de la démarche.

J'en discutais avec Marie, je l'ai vue la semaine passée qui m'a dit qu'il fallait discuter par rapport à ça. Mais ce qui est intéressant avec clé verte c'est que rien n'est figé. Tous les 2 -3 ans au niveau Green Key International on revoit les critères en fonction de chaque hébergement et en fonction des spécificités de chaque pays et même de chaque région parce que la Wallonie c'est pas la Flandres et ça pour moi c'est super intéressant. Même dans les critères obligatoires et dans les

critères facultatifs il y a chaque année il y a des changements et je peux aussi écrire ce que j'ai fait par moi même. Par exemple, la démarche zéro déchet rentre dans la démarche Clé Verte mais où la trouver dans le questionnaire si ce n'est au niveau des déchets mais bon ce n'est pas repris tel quel. Mais je m'y retrouve quand même et je ne veux pas arrêter parce que ça m'incite à continuer. Si je me dis c'est bon j'arrête la, je ne peux plus rien faire, je sais que j'aurai tendance à laisser tomber quelques trucs même si je suis concernée directement et que j'ai envie de faire le mieux possible même par rapport à ma propre démarche familiale.

Pouvez-vous nous parler en plus de détails au niveau pratique de votre démarche zéro déchet ? Et est-ce que vous arrivez à faire du « zéro déchet » avec vos clients ?

On est vraiment au début de la démarche donc je n'ai pas eu grand monde qui s'est lancé là-dedans. AU départ je compte mettre tout ce qui est produits basiques (épices, céréales, des choses comme ça) déjà en place dans des bocaux au gîte et en fonction du client : soit le client sont déjà dans la démarche soit ils ne le sont pas mais ils veulent profiter d'un séjour chez moi pour le faire, je peux organiser des tours des commerçants près de chez moi. Je peux mettre en place en fonction de ce que le client souhaite comme forfait, des ateliers à thème (cosmétique, collations, ...) S'il y a des enfants on peut mettre en place des chasses aux trésors à thème. Au niveau des visites touristiques de la région, des endroits inévitables comme la Flobette en bord de Lesse à Dinant, une jolie promenade intéressante au niveau de la flore et qui finit en bord de la Lesse où il y a un petit estaminet où on peut leur proposer une cuisine à base de produits locaux et de fleurs sauvages et qui propose que des produits en dehors de la consommation habituelle. Il y a aussi une promenade avec des sculptures 'land art' dans toute la région de Ciney, faites par des artistes internationaux avec des produits naturels. Je peux créer un weekend ou un programme en fonction des envies du client. Au niveau des magasins zéro déchet, il y a deux magasins en vrac, un à 2 km de chez moi donc on peut y aller à vélo et un autre au centre de Ciney. Il y a aussi la coopérative Cocoricoop. J'ai commencé au mois de janvier (2019). Donc dans ma signature email, je mets systématiquement qu'ils peuvent commander auprès de la coopérative et que moi je me charge d'aller chercher leur course et de les mettre dans le frigo quand ils arrivent et donc ça ça fonctionne très bien auprès du public francophone parce que c'est écrit en français mais je pourrai penser à traduire aussi. Ça, ça a plus tout de suite. Ils ne sont pas encore totalement dans le zéro déchet mais ils sont en train de trouver des solutions pour le faire. Comme pour laver les bocaux, donc ça évolue. En tous cas, les légumes on les récupère avec des sachets en papier qu'on leur rend, certains bocaux sont consignés d'autres pas mais presque tous sont recyclables.

Le fait de le mettre en signature de mail c'est donc très efficace, nous l'avons vu tout de suite en prenant contact avec vous.

Et bien oui parce que sur le site web il y a trop d'information donc la signature du mail ça fonctionne bien et en plus Facebook de temps en temps.

Au niveau du lagunage, pouvez-vous nous en parler un petit peu plus ?

Le village est en zone d'épuration collective. Je suis sur l'autre versant qui est en zone d'épuration individuelle. [...]

Vous êtes près d'une réserve naturelle et aussi membre du Réseau Nature Natagora. Pouvez-vous nous parler un peu plus de vos extérieurs et qu'est ce que cela implique d'être membre de ce réseau ?

Ecoutez ça implique qu'on achète plus de plantes non-indigènes, qu'on ait plus de produits style pesticides, on essaie d'arroser uniquement le soir. On essaie de trouver des techniques d'arrosage efficace. On a mis des canards dans le potager pour enlever les limaces plutôt que des produits. On a une petite mare qui était déjà sur place avec des poissons rouges dont on a essayé de se débarrasser mais ils se reproduisent mais la faune autour de la mare est de plus en plus développée. On a des batraciens plus ou moins une quarantaine de couples au moment de la copulation. On a beaucoup de libellules aussi. Au niveau des oiseaux, j'étais désespérée en arrivant car je trouvais qu'il n'y en avait pas beaucoup donc j'ai installé pas mal de nichoirs. Ils sont maintenant tous pris au moment du printemps. On a découvert quelques nouvelles espèces, potentiellement une chouette. On a vu un hérisson et c'est la première année qu'on voit un écureuil.

Comment se passe l'intégration du Réseau Nature Natagora ?

C'est qui postulons de notre côté. je n'ai jamais eu de visite il n'ont pas le temps de faire ça mais on envoi des photos et ce qui a été fait. L'autre année ils ont re-demandé ce qui avait été fait. Ils envoient régulièrement des propositions d'aménagement de jardin. On a laissé pousser la flore sur un versant et donc on a une magnifique flore qui pousse d'elle même. [...] On a mis des tas de bois un peu partout pour les petites bêtes. On a aussi installé un hôtel à insecte qu'on a mis près du potager qu'on a fait nous même. Je vois que les gîteurs ont aussi remarqué l'évolution dans le jardin.

Toujours au niveau environnemental, avez vous une idée de vos émissions carbone ? Avez-vous réaliser une analyse de l'impact envi régulièrement de votre gîte ?

Non. Le label clé verte nous demande de relèver notre consommation de manière régulière, tous les mois. On ne sait pas aller plus loin car on a pour la maison et le gîte une seule chaudière et pas de compteur de passage donc c'est très difficile. Donc je divise par la nombre de personnes sur le weekend. Mais on sait que ça va changer ça fait partie de nos futures améliorations parce que la chaudière est au fioul bientôt ça ne sera plus possible et pour moi c'est vraiment pas possible de continuer avec ça. On est en train de réfléchir mais ça n'a pas été facile de trouver les informations pour voir ce qui conviendrait le mieux pour notre habitation et le terrain qui l'entoure. [...] Pour finir on en revient à une solution pas forcément la plus écologique mais qui convient le mieux pour nous c'est de mettre une citerne. On va diviser en deux chaudières pour pouvoir faire les calculs séparément. Mais faire l'analyse de l'empreinte des gens qui viennent chez nous ça c'est impossible. C'est souvent des grands groupes donc on donne les instructions au premier mais on ne peut pas s'assurer pour autant que le reste du groupe va suivre. Vous pensez bien qu'en plus leur demander qui vient d'où combien de kilomètres ils ont fait etc. Ils ne sont pas là pour répondre à des questionnaires quoi. Par contre, je peux vous dire ceux qui sont venus en train leur empreinte est bien plus réduite. J'ai eu trois fois des locataires qui sont venus en train jusqu'à Chapois et puis à pied de Chapois donc là c'était super.

Passons maintenant au patrimoine culturel, vous l'avez déjà abordé en mentionnant des balades, vous avez aussi fait une journée portes ouvertes comme l'indique votre site. Pouvez-vous nous parler des moyens mis en œuvre pour préserver le patrimoine culturel de votre région ?

Ma manière principale de communiquer ce sont les réseaux sociaux ou à l'arrivée des gîteurs parce qu'ils n'ont pas forcément toutes les infos quand ils arrivent. Je fais la promo de toutes les activités qui sont organisées par la maison du tourisme chez nous et qui sont essentiellement tournées vers les produits du terroir. Il faut le savoir la région dans laquelle on habite c'est quand même les 'Vallées des Saveurs'. On a énormément de fermes autour et d'activités qui sont liés au terroir comme des marches gourmandes avec à chaque fois des produits de la région. Il y a des fermes ouvertes régulièrement et des activités balades à thèmes organisée par Ciney Environnement soit par le Domaine de Chevetogne soit par des particuliers. Il faut dire que la maison du tourisme a mis en place des guides à thèmes. Donc la semaine dernière, une guide est venue organiser une balade sur les plantes médicinales à partir des Grange d'Ychippe. C'était un parcours de 10 km avec un retour chez nous suivi d'une dégustation à base de plantes sauvages comme des sirops et des taboulés. La maison du tourisme est vraiment très très active à ce niveau-là. Il y a aussi beaucoup de cartes dans le gîte pour les balades qu'on peut faire autour que ce soit les réserves

naturelle (je peux même faire appel à un guide si le client veut aller plus loin dans la réserve) et aussi tout ce qui est balade vélo etc.

Donc si je comprends bien votre rôle consiste à mettre en avant ce qui est organisé par la maison du tourisme dans votre région ?

Oui. Maison du tourisme ou autre initiative. Je n'organise pas moi même parce que je travaille à temps plein et je trouve qu'il y a les choses sont très bien faites ici. J'hésite à contacter Natagora pour qu'ils organisent une soirée chauve souris ici parce qu'on en a énormément dans le jardin.

C'est chouette d'avoir un gîte qui se situe dans une région où il existe autant d'activité.

Oui oui on a beaucoup de chance pour ça. Ils organisent aussi des journées partenaires ou on peut rencontrer les autres partenaires touristiques comme les attractions ou les guides. Cela nous permet de faire des contacts.

Comme vous parlez de partenaires, pouvez-vous m'en dire un peu plus sur l'implication des autorités locales dans le développement de votre gîte ? Avez-vous d'autres partenariats que vous auriez avec la communauté ou les autorités locales ?

Les autorités locales je ne vois pas trop parce que c'est une toute nouvelle équipe qui s'est mis en place mais moi même je suis devenue conseillère communale Ecolo cette année. J'essaie à ma manière d'influencer les choses vers le zéro déchet ou la conservation de l'environnement. Je ne pense pas que la commune avance très fort, la maison du tourisme ou l'office du tourisme peut être. Ça c'est un partenaire surement. Dans toutes nos démarches d'achat de travaux ou de services on le fait via des sociétés de réinsertion professionnelle pour le nettoyage des draps ou travaux dans le jardin ou dans la maison. Quand on a construit des cabanes on l'a fait avec du bois de la scierie du coin, etc. Moi je tiens au groupe Ciney Zéro Déchet que j'ai mis en place il y a deux ans et demi qui permet de créer une communauté de particuliers et aussi de commerçants. Avec l'aide de Zéro Waste Belgium, on essaie de se fédérer entre groupes zéro déchet sur toute la Belgique francophone pour partager nos outils entre nous et renvoyer les gens au bons ateliers au bon endroit etc. Grâce à ça on va peut être bénéficier des autocollants pour les commerces zéro déchet. J'ai commencé ma distribution des commerçants qui souhaitent faire savoir à leur clientèle qu'ils acceptent les contenants de leurs clients. Via ce groupe je mets énormément en avant les producteurs de la région ca c'est clair ca marche bien. 1900 personnes dans le groupe. Clair que pas tous de Ciney, mais quand on parle de zéro déchet, les gens essaient de trouver un maximum d'informations donc s'inscrivent partout.

Pensez-vous avoir un impact sur les populations locales (en plus de tous les partenaires mentionnés) ? Les retombées du gîte ont-elles vraiment un impact sur le village ?

J'ai plus tendance à dire que c'est moi qui vais vers ce qui se passe et se produit dans la région que les gîteurs d'eux même. Parce que la plupart viennent avec leurs courses, surtout pour ceux qui ne viennent qu'un weekend. [...] Sauf peut être en ce qui concerne la restauration et les attractions touristiques. J'ai tendance à les envoyer vers des attractions nature plutôt que d'autres. Au niveau des producteurs, s'ils participent aux activités organisées oui. Je ne vois pas comment sur un weekend... voilà.

C'est plus une symbiose entre les activités proposées dans la région et votre gîte que votre gîte qui aurait stimulé la création de ces activités qui n'existait pas avant.

Oui voilà ce n'est pas moi qui les crée c'est clair. Mais par contre je trouve qu'il y a une réelle émulation au niveau des citoyens notamment avec la coopérative. Nous sommes coopérateurs ici. [...] Le fait qu'on utilise la monnaie locale chez nous, ça fait partie du même groupe. Ce sont à chaque fois les mêmes personnes qu'on retrouve du marché bio au groupe zéro déchet etc. La grange d'Ychippe on ne peut pas dire qu'elle soit appelée dans l'organisation d'événements ou quoi que ce soit mais de mon point de vue je voulais être impliquée.

Ensuite avez-vous un système mis en place pour évaluer leur satisfaction de leur séjour chez vous ?

Deux choses. Je n'ai pas mis de carnet de bienvenue. Par contre j'ai fait un petit questionnaire ou ils peuvent répondre à quelques questions. Mais moins en moins de réponses par rapport au départ et je leur demande de mettre leur avis sur un réseau social de leur choix pour leur séjour. Pas beaucoup de gens répondent que ce soit pour l'un ou pour l'autre. Donc j'ai tendance à privilégier les réseaux sociaux parce que ça peut me servir pour ma communication. Mais le petit formulaire j'avais des questions du style : Pourquoi venez-vous chez moi ? Est ce pour le label ? Pour le matériel bébé ? Avez-vous fait vos courses dans un supermarché, dans une ferme, produits locaux ? Il y a aussi des questions sur le label clé verte et si les clients avaient remarqué quoi que ce soit par rapport à ma démarche ? Et je leur demandais des suggestions par rapport à ces démarches. J'avais eu des bons retours et plusieurs idées m'avaient été proposées que j'ai mis en place.

Avez-vous modifié ou mis en place certaines choses suite à des suggestions des clients ?

Oui oui. Par exemple, la poubelle composte de ville je ne l'avais jamais utilisé avant parce que j'avais un composte dans mon jardin. Je l'ai mise pour les langes de bébés, je n'y avais pas pensé mais c'est un de mes premiers publics se sont les familles avec des bébés [...] donc ça chiffre vite en terme de poubelles. Le composte de ville a donc été mis en place suite à leur demande. On m'a aussi demandé à mettre la boîte composte plus proche du gîte pour ne pas à avoir traverser tout le jardin.

Avez-vous remarqué, suite au label et à vos prix reçus, qu'ils vous ramènent plus de clientèle ?

C'est difficile à dire car je ne sais pas comment ils sont arrivés chez moi. Ce que je peux dire c'est que depuis que j'ai commencé le label, par rapport à l'ancien propriétaire, j'ai un taux de 50% de gens qui viennent de mon site internet. L'autre moitié vient via une agence locale soit TripAdvisor ou Airbnb mais ce ne sont pas vraiment mes clients préférés. L'agence nous a contacté pour savoir ce qu'il y avait de plus chez nous. On leur a expliqué que notre site fonctionnait bien et donc je sais qu'il y a une priorité qui fait que les gens sont attiré par ce que je fais. Et le fait d'être dans cette démarche écologique me permet de communiquer énormément. [...] Le fait de communiquer sur les prix régulièrement je le vois au analyses statistiques sur mon site internet ça fonctionne. Je vois les pics au moment ou je poste donc je suppose que ça a un impact. Maintenant dire que les gens viennent chez moi uniquement parce que je suis labellisée clé verte j'en ai eu peut-être. J'en ai eu deux trois ils me l'ont dit, mais c'est tout. Ce qui m'intéresse surtout c'est qui se rend compte que même en allant dans un gîte clé verte et même en mettant en place des choses basiques et ils peuvent avoir un impact et c'est le plus important pour moi. Je remarque que les clients quel que soit leur cas social sont intéressés quand ils arrivent et posent des questions mais ne sont pas venus pour ça au départ.

[...]

J'ai trois types de publics. Des familles, des groupes d'amis et un public institutionnel. Je fais des prix pour les enfants placés par le juge ou ayant un handicap léger. [...] Quand je repense au points sociaux, on met un point d'honneur à accueillir un public plus fragilisé. On appartient à l'opération gîte solidaire. J'ai aussi voulu me démarquer et suivre les Gîtes de Wallonie par rapport à l'accueil des personnes LGBTQ+. Il faut savoir que je travaille pour l'égalité aussi dans mon job actuel et je trouvais important de pouvoir aller dans leur sens. Ils doivent savoir à l'avance si l'endroit ou ils vont il n'y aura pas de problème en arrivant. Les Gîtes de Wallonie ont mis en place ce label et j'étais la première inscrite. [...]

Voilà je pense que nous arrivons à la fin de nos questions, quelle est la vision pour les prochaines années ? Des améliorations, des agrandissements ?

Non, pas vraiment en dehors de la chaudière. Pour l'instant en terme d'investissement. On aimerait refaire la cuisine du gîte et la faire plus en accord avec notre démarche zéro déchet donc la réaménager autrement et on aimerait la faire en récupération, un peu comme les magasins zéro déchet en palette, je trouve ça pas mal. On a pensé aux toilettes sèches. [...] Comme deux de nos toilettes sont à l'intérieur de salles de bain on a vraiment de temps en temps des plaintes du manque de toilettes, donc on a pensé à rajouter des sèches mais on n'a pas assez de place à l'arrière du gîte comme pour la chaudière à pellets. Ce sont les questions qu'on se pose. Mais entre le moment où on a une envie et le moment où on doit le mettre en route, les choses ne sont pas si simples que ça ou qu'elles coûtent trop cher. On est ouvert à tout. Mon envie est de continuer la démarche clé verte et surtout d'être ambassadeur de la démarche écologique quelque part. Régulièrement, on me demande de venir parler du label clé verte avec Marie Spaey. Moi je le fais en tant qu'exemple de gîte et ça je le fais régulièrement.

B. Michel Duquaine – The Utopia Hotel

Pouvez-vous vous présenter en quelques mots et décrire votre rôle au sein de l'établissement ?

Je m'appelle Michel Duquaine, je suis architecte, J'ai créé cet hôtel en 2010. J'ai toujours travaillé dans le cadre du durable qui va plus loin que l'écologie. J'ai créé cet hôtel à vocation d'être passif, un des premiers en Wallonie. Avec une charte extrémiste en oubliant l'aspect économique de l'investissement.

J'ai créé une extension en 2017 dans un concept plus durable (chercher un rapport entre la trilogie écologie, économie et social). Nous avons été labellisés green key par le ministre en janvier 2018. Pour cela, nous avons dû répondre à un ensemble de critères qui sont des critères relativement durables (pas que écologiques).

Le but était, dans un premier temps, un engagement personnel mais l'enjeu de la rentabilité est entré en ligne de compte, dans le sens : « Y a-t-il un avenir ? Quels sont les enjeux ? etc. »

Je suis également enseignant à la fac d'architecture de Mons, en master 2 pour un cours qui s'intitule : économie de la construction durable pour lequel j'aborde notamment la notion d'investissement. Ce qui est très rarement abordé.

Quels sont les autres hôtels passifs en Wallonie ?

Le passif c'est une performance, un résultat à atteindre, c'est-à-dire 15KW/m2 par an. Ce calcul ne prend pas en compte l'aspect environnemental, l'aspect social, l'esthétisme, l'aspect économique etc. C'est une image assez écolo-bobo, donc pour des personnes assez nanties et qui veulent une image. Le passif, cela limite l'appréciation d'un bien immobilier à sa consommation. Peu importe les investissements, sa situation, ... Ce qui est important pour moi, c'est la vision globale (sur les 3 piliers).

Comment avez-vous fonctionné pour évaluer ces trois piliers ?

En terme écologique, on parle essentiellement de la dépense énergétique et de la construction. Du CO2 consommé. En 2017, j'ai été plus loin en intégrant la notion du social et de l'économique. J'ai opté pour une construction ossature bois. L'avantage est que cela stocke le CO2 ce qui crée un équilibre avec la consommation de carbone dans l'ossature. Les terrasses sont également en bois, tout comme la salle à manger. Leur rôle est également esthétique.

En termes de consommation : j'ai 3 citernes d'eau pluviales de 20000L. Les eaux sont récupérées sur le toit et envoyées dans les citernes pour alimenter les WC, machines à laver et arrosage. J'utilise des robinets réducteurs de débit, des ampoules basse consommation etc. Mais attention,

ce n'est pas avec des ampoules qu'on fait de l'économie, c'est parfois un argument de Green washing. Par contre, les pompes à chaleur avec un coefficient de rentabilité, là cela a un réel intérêt. Je consomme 2100 euros par an, ce qui est très raisonnable pour un tel bâtiment. J'ai également installé des panneaux solaires thermiques et j'ai un projet de panneaux solaires photovoltaïques entre 200 et 300m².

En ce qui concerne le label Green Key, ils nous imposent la sensibilisation des clients et la communication, ce qui est très intéressant. Je pense que c'est un point essentiel, avant je ne me faisais pas et j'ai perdu du potentiel. Cela doit s'accompagner d'un plan marketing mais c'est difficile pour un petit hôtel contrairement aux grandes chaînes. Concernant le chauffage, j'ai décidé de ne pas mettre de gaz. Je chauffe en partie par pellets et aussi par pompes à chaleur réversible. L'objectif était de ne pas consommer d'énergies fossiles (Dans sa charte personnelle de départ de 2010). Je possède également deux stations d'épuration, c'était imposé mais c'est quand même bien. En ce qui concerne les déchets, je trie, évidemment. De plus, le label green key a insisté sur certaines choses comme un composte.

Pour la cuisine, je tente d'utiliser des produits locaux de plus en plus. Surtout à travers l'embauche d'une nouvelle chef qui a cette philosophie. Même si le prix a une influence. Par exemple pour le café mais du coup, nous le choisissons Fairtrade. J'essaie que cela garde du sens. Par exemple pour le nettoyage des chambres, j'utilise seulement certains textiles, produits écologiques pour ne pas attaquer la station d'épuration.

Avez-vous construit votre hôtel par rapport au patrimoine architectural de la région ?

En ce qui concerne le style architectural : il faut faire attention à la notion de patrimoine en architecture. Il y a parfois une confusion avec le passé historique. Le patrimoine peut être un bâtiment contemporain. Pour les extérieurs, un arbre c'est un patrimoine. Un hêtre a plus de valeur patrimoniale qu'un sapin. De plus, Dupuis, le grand architecte belge, va être classé patrimoine alors qu'il faisait des toitures plates. Mais dans les communes c'est actuellement interdit. C'est cela le paradoxe. Donc quand on me parle de patrimoine, si c'est dans la notion, souci du milieu, alors je peux vous dire que oui au niveau de la lecture architecturale. Mais je ne me suis pas aligné à un patrimoine architectural que je trouve médiocre. Ma volonté était esthétique pour s'intégrer dans le paysage.

Avez-vous utilisé des matériaux locaux pour la construction ?

Pas de matériaux locaux pour la construction.

Analysez-vous votre consommation ?

Le manager suit la consommation en eau et électrique mensuellement dans l'objectif de les diminuer. Mais je ne le fais pas. Cela s'inscrit dans le projet des panneaux solaires pour pouvoir produire au moins la moitié de ce qu'on consomme.

Avez-vous autre chose à ajouter au plan environnemental ?

Nous avons un plan d'eau dans lequel un biotope s'est créé : oiseaux, grenouilles, chevreuils. De plus, j'ai refait un nouveau plan d'eau pour poissons. Cela crée du plaisir et cela renforce l'anneau social et sensibilise la clientèle envers la nature.

D'un point de vue social, comment se passe la sensibilisation des clients mais aussi du personnel ?

Dans le hall d'entrée, nous avons 4 A3 encadrés dans lesquelles il y a la charte d'engagement personnel ainsi que sur les efforts fournis. En plus, nous mettons à disposition une brochure sur Green Key. Au niveau des WC dans les salles de bain : un sticker mentionne : "attention c'est de l'eau de pluie" car parfois l'eau n'est pas 100% claire. Le restaurant qui est aquarium sur la nature permet une communication directe entre l'extérieur et intérieur mais c'est assez inconscient.

En ce qui concerne la sensibilisation du personnel : Nous employons 22 personnes. Ceux-ci doivent suivre charte green key, donc cela leur est expliqué de manière moins formelle. J'essaie de parler à mon personnel pour les sensibiliser mais certains sont parfois peu réceptifs. Par contre, au niveau opérationnel, ils respectent toutes les directives.

Pensez-vous favoriser les emplois locaux ?

Je passe par les PFI (plan-formation insertion). Parfois cela se passe bien, parfois moins bien. C'est le directeur qui s'en occupe. Les personnes employées ne viennent pas nécessairement de la région car il y a un problème de compétences. Mon directeur vient de Bruxelles, maintenant tout dépend ce qu'on entend par région. Par contre, le Chef de restaurant, le fait que cette personne soit proche de l'établissement était un facteur important. Notamment pour les shifts coupés.

Favorisez-vous le tourisme pour tous ?

C'est imposé par le CGT donc c'est du pipeau. Mais je suis totalement conforme.

Faites-vous la promotion d'initiatives de la communauté locale ?

Nous organisons la présentation d'une bière locale, qui fait partie du patrimoine belge. Dans une volonté de développement économique.

D'après un conférencier que nous avons accueilli à la faculté, mon hôtel est plus durable si on sait s'y garer. Nous avons donc installé une borne électrique sur le parking.

Avez-vous quelque chose à ajouter au niveau du volet social ?

Au niveau social, nous avons l'étude paysagère, le côté esthétique. De plus, nous faisons vivre des gens en direct (à travers les emplois à l'hôtel) mais aussi en indirect (via des prestataires de services comme le nettoyage des draps). Nous avons reçu des primes pour notre agrandissement : Des Fonds européens et du CGT. Les conditions sont liées au montant d'investissement et à la création d'emploi dans le tourisme. Donc c'est lié au développement économique de la région.

Passons maintenant au volet économique :

Quand on parle d'économie pour un bâtiment immobilier, il y a plusieurs aspects. Il y a la valeur du bien, son entretien (car l'entretien d'un bâtiment sur 30 ans coûte 3 fois le prix du bâtiment).

Ici, j'ai 1,5 personne à temps plein pour l'entretenir. Quand je mets du gazon, je dois l'entretenir, tondre, payer tondeuse etc. A côté de ça, Si on coupe l'herbe une fois par an pour l'écologie, on supprime aussi un temps plein. Il y a aussi la problématique de la voiture électrique, c'est super mais cela va mettre des milliers de personnes au chômage. Ce n'est donc pas aussi simple qu'on ne le pense.

Je vais vous donner un exemple d'un de mes cours : Chaque année, je choisis un bâtiment et mes étudiants peuvent bosser dessus (les aménagements, le types de construction, la consommation, etc.). Cette année-là j'ai choisi mon hôtel. Des étudiants suggéraient de mettre des bacs à plantes le long de l'accès au restaurant pour augmenter le côté esthétique mais également pour disposer d'herbes aromatiques pour le restaurant mais aussi pour sensibiliser le personnel et les clients à la nature. C'est un mini-exemple mais il se situe au centre de des trois piliers. Je l'ai mis en place car je trouvais l'idée géniale et j'observe que le chef s'en sert et que cela ajoute quelque chose à l'hôtel.

Avez-vous quelque chose à ajouter pour le volet économique ?

On pourrait avoir des retombées économiques sur notre communication sur le fait que nous sommes un hôtel. Cela malheureusement, je ne le ressens pas. Cela n'arrive jamais que quelqu'un se soucie

de ce que j'ai mis en œuvre pour respecter l'environnement. Mais ils disent « votre terrasse est belle ».

Néanmoins, je pense que c'est un investissement pour l'avenir. Je pense que l'investissement que j'ai fait ne sera pas totalement rentabilisé. Mais ce n'est pas uniquement un travail d'investissement. Je pense que la communication est fondamentale aujourd'hui. De plus, du point de vue économique, le bâtiment consomme peu, cela apporte donc de la valeur ajoutée sur valeur commerciale du bien.

Comment envisagez-vous le futur de votre établissement ?

Je compte faire dix cabanes en plus dans le bois (ossatures bois posées sur des pilotis pour respecter l'environnement). A chaque fois que je fais quelque chose, j'essaie d'avoir une vision globale comme planter plantations indigènes c'est important. Mais concernant la vision long terme, je n'ai pas de plan à mon échelle même si je suis toujours à la recherche de projets.

Connaissez-vous des établissements similaires au votre ? Je ne vois pas. Mon gros concurrent sur Mons c'est Van der Valk (un groupe hollandais). D'ailleurs j'ai dû le dénoncer car il évoquait dans son site internet, le label clé verte. Or je sais que les clés vertes n'ont pas été octroyées encore. Là, le label les a contactés. C'est sur un autre site qu'ils l'avaient obtenu. Dans la région, quelqu'un qui s'inquiète de l'environnement il n'y en a pas. Je sais que l'hôtel Orange a investi dans des éoliennes mais dans un pur but économique et pas global. Il y en a sûrement mais je ne les connais pas.

C. Jacqueline Daloze – A quiet place

Pourriez-vous vous présenter en quelques mots ainsi que votre rôle au sein des chambres d'hôtes ?

Je m'appelle Jacqueline Daloze et je suis la propriétaire des chambres d'hôtes. Je suis la seule donc je suis aussi la gérante, la concierge etc. Au départ, j'ai toujours été orientée communication interpersonnelle, je suis diplômée de l'institut national des arts de la scène avec une spécialisation en communication à partir des arts de la scène dans une logique de communiquer un projet. J'ai été journaliste en presse locale et spécialisée enfants. J'ai été directrice d'un centre culturel durant une vingtaine d'années et je collectais histoires de vies à visée historique. L'ASBL a fermé et donc je me suis retrouvée sans emploi à 59 ans.

En 1993, je suis venue habiter à Rossignol et j'ai commencé à chercher une habitation. J'ai été séduite par une petite fermette là-bas. Je l'ai d'abord louée. J'ai ensuite rencontré mon second époux. J'ai donc eu besoin de place car il avait des enfants. Nous étions donc sept. J'ai eu l'occasion d'acheter la maison grâce à la ligue des familles qui octroie des prêts familles. Avec le prêt, j'ai regardé l'usage que je pouvais en faire niveau espace pour les enfants etc. Les dépendances sont donc devenues habitations et nous disposons donc de beaucoup plus d'espace.

Ensuite, les enfants sont partis et le mari aussi. Je me suis donc retrouvée seule dans cette grande maison. Néanmoins, je suis attachée à cette maison pour le bien être qui y règne. Quand j'ai perdu son boulot, j'ai regardé ce que je pouvais faire d'autre. Ce n'était pas évident du tout car je venais d'un boulot où j'étais vraiment mon propre maître. Je connaissais de mieux en mieux ma région grâce aux interviews des gens et mon job de journaliste. Celle-ci se développe énormément sur le plan économique et touristique.

De plus, deux de mes enfants habitent à l'étranger, le plus jeune a fait un Erasmus et mon père habite dans le sud. Ce qui m'oblige à voyager et je choisis souvent des chambres d'hôtes pour le prix et le côté relationnel. De là est venue l'idée des chambres d'hôtes car il y a de nombreux événements autour de la maison. Il y avait une demande d'hébergements notamment Gaume jazz festival et airbnb commençait à se faire connaître dans le coin. J'hébergeais déjà des gens chez moi gratuitement durant le festival et j'ai fait du couchsurfing. Mais quand j'ai perdu mon boulot, j'ai arrêté le bénévolat.

J'ai donc ouvert sur Airbnb de façon assez spontanée. Airbnb c'est super facile. Puis j'ai appris via des réunions de l'agence de développement pour l'emploi, qu'ils encouragent les gens à ouvrir des gîtes et chambres d'hôtes. Ils avaient invité des gens du secteur pour parler de leur expérience. D'après eux, en Belgique, les obligations de sécurité étaient les mêmes si on louait une nuit ou toutes les nuits de l'année. Accueil champêtre m'a donc motivée, ils sont venus chez moi pour voir si le projet tenait la route et j'ai fait la démarche concernant la sécurité.

Je suis donc rentrée dans une logique plus professionnelle de chambres d'hôtes. J'ai rempli un dossier etc. Attention, ce n'est pas gîte car il faut une entrée indépendante et je ne dispose que d'une entrée. J'ai demandé une reconnaissance au CGT car cela donne droit à certaines subventions sur les équipements et j'ai été autorisée à faire de la pub sur les sites institutionnels. Ces sites ne nous amènent pas de clientèle mais cela permet de de la visibilité, des rencontres etc. via la marque Ardennes notamment. On reçoit des outils, on est stimulés donc c'est très intéressant. Ce qui est bien pour ne pas être seul car je rencontre beaucoup de gens mais professionnellement je suis seule.

En trois ans, j'ai fait des investissements ce qui implique que la qualité a augmenté et le prix aussi. J'ai donc, opté depuis mars 2018, pour Booking et Expédia. Avant j'étais sur les sites institutionnels mais cela ramenait peu de clientèle. J'étais aussi sur bed&breakfast.eu, ça ramenait un peu des gens. Airbnb, a facilité ma vie à condition d'être rigoureuse sur mon agenda. Booking et Expédia cela m'a permis de tripler mon chiffre d'affaire, je suis toujours sur airbnb mais j'ai peu de clients car j'ai augmenté mes prix. Pour Booking et Expédia, je dispose d'un outil de synchronisation pour les réservations etc. C'est bien plus facile que de le faire à la main. Maintenant, quasi 50% des réservations se font via Booking. J'ai également pas mal de clients immédiats qui me contactent directement par téléphone car on me dit que je suis bien référencée et je fais de la communication via Facebook. Puis il y a Expédia puis mon site internet où c'est un peu moins cher. L'objectif de cette démarche est financier. Je pensais dégager assez d'argent pour faire des travaux mais cela est à oublier. Je voulais faire des travaux de transformation en appartements pour ma retraite. Mais économiquement je dégage suffisamment pour entretenir ma maison et vivre plus confortablement.

En ce qui concerne l'aspect partage, j'aime faire connaître ma région. Je ne fais pas table d'hôtes car j'aime faire la médiation avec la région. C'est à moi à faire connaître, ce qui est sûrement lié à mon passé. Je mets à disposition de la documentation dans les chambres et je me renseigne toujours sur ce qui se fait dans la région, pour donner des recommandations. J'estime que c'est vraiment mon job.

En ce qui concerne votre mémoire donc, l'écotourisme, j'ai fait demande pour le label clé verte. J'ai longtemps hésité et je suis toujours mitigée car c'est un outil de sensibilisation. Ici c'est un lieu tranquille, authentique. Je veux offrir une expérience de bien-être, c'est pour cela que cela s'appelle « A quiet place ». Et je ne me considère pas comme une institutrice qui explique comment gérer l'eau, l'électricité etc. Néanmoins, j'essaie d'utiliser au maximum le visuel pour inciter les gens à se conduire comme des hôtes écoresponsables. Je recherche, par exemple, des petits sabliers à mettre dans la douche pour la sensibilisation des hôtes. Maintenant eux se satisfont de ce que je fais. Je donne des informations écoresponsables dans la farde avec les informations touristiques. C'est la troisième fois que je fais la démarche avec clé verte. Au niveau des pratiques écologiques etc., je le fais mais c'est au niveau de la sensibilisation que je trouve cela compliqué.

En ce qui concerne le club Ardennes Ecotourism, j'adore les webinaires, notamment sur le recyclage et les petits déjeuners zéro déchets. J'ai vraiment trouvé cela super. Dans les années 80, je ne faisais pas de recyclage. Mais en ouvrant les chambres d'hôtes elle a été sensibilisée. Mais depuis le webinaire, cela a vraiment été un déclic. Et maintenant j'y vais à fond recyclage alimentaire. Depuis, je cuisine beaucoup plus, tous les jours je cuisine un petit truc maison. Le webinaire cela me permet de discuter via le chat avec d'autres personnes. Et je trouve que c'est très intéressant. Avec les restes, j'alimente systématiquement le frigo partagé du village.

D'où vient cette motivation écoresponsable ?

Il s'agit d'une pratique personnelle pour des raisons économiques au départ (économie de l'eau, l'électricité etc.). Il y a quelques années, je me suis retrouvée dans une situation financière fort compliquée. Ce qui a remis un peu en question mon mode de vie. J'achète des aliments de qualité mais j'évite le gaspillage à tout prix. Et c'est une valeur que j'ai enseignée à mes enfants. Je suis devenue plutôt végétarienne mais plus par goût, ce qui correspond à une tendance assez actuelle. De plus, je n'ai jamais été fort dépensière, ce n'est pas dans mon mode de vie et c'est probablement lié à mon éducation. Ces pratiques sont maintenant devenues une tendance et plus pour un but seulement économique.

Contradiction sur Booking. Ce site booking demande si on a un label car c'est très demandé par les voyageurs mais quand je regarde les poubelles des gens, ce n'est pas du tout écologique. C'est hallucinant, ils mangent des fast-food etc. Ils nous demandent certaines choses mais cela ne se reflète pas dans les pratiques des voyageurs.

Etablissez-vous des partenariats avec des producteurs locaux ?

Je vais au marché le mercredi (réunit 17 producteurs d'un rayon de 100km maximum), j'ai aussi mon jardin dans lequel je fais pousser quelques trucs. Quand j'ai trop dans mon jardin, je vais chez mon fournisseur et je fais du troc. Il me reprend au prix de gros mes fruits et il me fait un bon à valoir. Je travaille avec un traiteur à 7km de chez moi, qui a une démarche zéro déchet et qui travaille avec des petits producteurs locaux. Je vais parfois chez Colruyt pour acheter ce qui n'est pas possible d'acheter ailleurs mais alors je tente d'acheter des produits locaux et bio. Et je vais systématiquement chez des boulangers locaux.

Pouvez-vous nous en dire plus sur le patrimoine culturel de votre région ?

Il y a le parc de rossignol avec les jeunesses musicales dans le parc. Le centre culturel est également dans le parc. Il y a donc de nombreux concerts organisés là-bas. Il y a également des calèches, une pisciculture. En ce qui concerne les partenariats, nous sommes dans une Région qui souffre de la peste porcine. J'ai rencontré des gens d'un établissement dans la forêt dans le cadre d'une interview sur le sujet. Dès que cela a rouvert, je leur ai envoyé des gens. Cela leur a fait plaisir et mes clients étaient contents de découvrir cette adresse cachée. Le problème avec les petits artisans, c'est qu'ils communiquent avec la communauté locale uniquement. Ils devraient mieux communiquer, plus précisément pour les touristes, notamment en ce qui concerne les heures d'ouverture. Il faut les communiquer, les afficher. Si ce n'est pas fiable, c'est fort embêtant. J'essaie donc de voir avec l'office du tourisme pour qu'ils soient plus rigoureux et qu'ils utilisent Google. En ce qui concerne la culture, on a Chassepierre, on a Chiny. Pour le public local, 25% de la clientèle est liée à des mariages, anniversaires car ils occupent les salles de village. Ils entendent parler de mon établissement via le bouche à oreilles. Les gens qui viennent chez moi ne vont pas forcément poster un commentaire mais vont souvent en parler autour d'eux.

Évaluez-vous la satisfaction des clients ?

Oui, j'avais mis en place un doc papier mais cela faisait beaucoup de papier donc j'ai fait un Google Form auquel j'ai intégré des questions (pour la clé verte) sur l'écologie.

Avez-vous remarqué un changement dans votre clientèle depuis que vous êtes dans le club ?

Non pas vraiment. Avec Booking, c'est vraiment une clientèle tout venant qui me considère comme un hôtel. Donc je me suis retrouvée avec une mauvaise cote de certaines personnes car je n'ai pas de chauffage pas pendant la nuit. Ils ont critiqué le petit déjeuner car ce sont des produits locaux et pas des croissants. Je mets donc en question ce tout venant. Mon confort est standard, je ne suis

pas un hôtel. Je réfléchis car je voudrais une clientèle ouverte dans le partage et c'est pour cela que je suis dans la démarche clé verte. Mais il n'existe pas beaucoup de possibilités d'hébergement dans la région autre que des gîtes. Je vais demander au préalable si les gens ont des demandes spéciales.

Avez-vous quelque chose à ajouter ?

Je suis aussi dans le programme Wallonie Destination Qualité qui se concentre sur l'accueil, c'est sur 3 ans, je mets moi-même mon objectif et on me demande des comptes sur mes objectifs etc. Je propose une expérience de calme et d'authenticité mais parfois j'ai des demandes de fun de la part des clients. J'ai donc mis en place avec un partenaire des jeux, une enquête dans le village sous forme de jeu. La marque Ardennes m'aide à améliorer ce produit-là. Suite à ce projet, les gens peuvent faire du plogging également. Il faut aussi savoir que les partenaires régionaux ne sont pas que des organismes de contrôle, mais aussi des gens qui peuvent nous faire avancer. J'aime aussi beaucoup la rencontre avec les partenaires internationaux pour apprendre plein de choses et échanger. Et je trouve qu'ils doivent encourager tout le monde à cela. Quand on est seul c'est lourd à gérer. Les journées sont grosses, c'est difficile, surtout en saison.

D. Stéphanie Drothier – Ardennes Ecotourism

Pouvez-vous vous présenter et présenter votre rôle dans le projet Ardennes Ecotourism ?

Je m'appelle Stéphanie Drothier, je travaille à l'agence de développement touristiques des Ardennes, l'agence qui a pour vocation la promotion du territoire des Ardennes françaises financée par le conseil départemental. C'est donc une ASBL financée par des fonds publics. Cette agence de développement touristique est pilote du projet Ardennes Ecotourism, qui est un projet constitutif d'un portefeuille de projets. Ce portefeuille de projets s'appelle Ardennes Attractivity qui est une logique d'attractivité territoriale pour la destination Ardennes en France, Luxembourg et Belgique. Et donc le projet Ardennes Ecotourism c'est un projet pour constituer une offre de tourisme durable sur l'Ardennes Transfrontalière.

Quel est votre engagement/role par rapport aux établissements écotouristiques ?

Ardennes Ecotourism a trois piliers de développement, le premier est l'accompagnement des professionnels. Le deuxième c'est la valorisation des produits locaux auprès des touristes. Le troisième est le développement d'une itinérance douce transfrontalière.

Concernant le premier pilier on identifie sur chaque territoire les prestataires qui ont une volonté de s'intégrer dans le tourisme durable, qui mettent déjà des actions en œuvre et on les met en réseau, notamment en leur proposant des formations. L'accès au réseau est gratuit, et ce réseau s'appelle le club Ardennes Ecotourism. Les participants doivent s'engager à faire partie d'un club, répondre présents quand on organise des animations et formations. De plus, nous avons mis en place des critères spécifiques pour faire partie de ce club. Certains critères sont obligatoires comme les ampoules basse consommation, le tri des déchets, faire en sorte de réduire consommation d'eau etc. Il y a 3-4 critères obligatoires par catégorie et le reste, on ne demande que 35% de critères atteints car ce n'est pas un label, on est vraiment dans une logique d'accompagnement. Mais ils doivent d'engager à progresser.

Est-ce les professionnels qui posent leur candidature pour faire partie du réseau ?

Oui c'est ça. Soit par des rencontres soit par des sollicitations. Un de nos partenaires, accueil champêtre en Wallonie a envoyé un email à tous ses membres pour les informer du projet. Sur les Ardennes françaises c'est la même chose. On voit après si le candidat a un peu l'esprit du club et on lui propose d'adhérer. De plus, nous développons des itinéraires doux, nous essayons de trouver des prestataires qui se trouvent le long de ces itinéraires.

En terme d'écologie, quelle est votre philosophie ?

Il s'agit simplement d'appliquer les trois piliers du développement durable à l'activité touristique. Donc la première chose c'est que l'activité touristique bénéficie à l'économie locale. Nous encourageons tous nos prestataires à s'approvisionner chez des producteurs locaux. Faire travailler les personnes des environs. Le deuxième point c'est le critère social qui mériterait d'être plus développé, notamment l'accès au tourisme pour tous. Cela comprend les prestataires accueillant des personnes en situation de handicap mais également offrant des prix préférentiels aux familles en situation précaires. En France, il existe la « culture du cœur » qui est une antenne des restos du cœur qui œuvre pour le tourisme pour tous. En Belgique, certains gîtes offrent une semaine de vacances aux familles dans des situations précaires. Nous voilà, on a quand même quelques gîtes impliqués dans le tourisme à orientation sociale. Et le troisième pilier c'est l'environnement, faire en sorte que l'activité touristique ne nuise pas à l'environnement.

En ce qui concerne l'environnement, pensez-vous le préserver, le restaurer ?

Les parcs naturels le font mais ce n'est pas inscrit dans le projet Ardennes Ecotourisme. Mais quand ils vont créer des itinéraires etc, évidemment que les réserves Natura 2000 sont protégées, mises en valeur dans une logique de préservation. Mais ce n'est pas inscrit dans le projet même si c'est encouragé dans différents de nos critères. Certains membres sont également membres du réseau nature Natagora, et donc ce sont des prestataires déjà sensibilisés et nous nous faisons la promotion de leurs actions. Certains doivent encore faire des efforts à ce niveau-là mais beaucoup sont déjà bien avancés et méritent juste d'être mis en avant.

Au niveau des visiteurs, est-ce que Ardennes Ecotourism les sensibilise à une certaine conscience écologique ?

Au niveau de la sensibilisation, on est en train de développer un guide des écogestes à adopter qu'on mettra à disposition des prestataires, pour les aider à sensibiliser leurs clients. Il s'agira d'un petit chevalet à mettre à l'entrée ainsi que de petits autocollants à disposer. D'autre part, nous sommes en train de développer un blog qui est déjà en ligne. Là nous mettons en avant tous les engagements des professionnels. Ce n'est pas un site de promotion mais plutôt un site qui nous permet de justifier de l'engagement des membres. C'est un renseignement complémentaire pour les clients qui voudraient en savoir plus etc.

Savez-vous nous dire quand le projet a vu le jour ?

Le projet a commencé le premier octobre 2017.

Qui sont les parties prenantes de ce projet ?

Le portefeuille de projets Ardennes Attractivity qui compte trois projets constitutifs a été initié par le GEIE Destination Ardennes avec ses partenaires qui sont l'agence de développement touristique des Ardennes, la SPSB et la CPN. Nous avons écrit ensemble le projet, pour avoir une logique d'attractivité territoriale, une logique marketing et une logique de développement de produit écotouristique.

Est-ce les gouvernements ont eu une influence ?

Le CGT participe financièrement au projet. Son équivalent en France aussi et au Luxembourg, c'est un peu plus compliqué. Car on est sur deux programmations interreg, du coup ce sont des projets jumeaux qui ne bénéficient pas du même financement.

Les riverains ont-ils été inclus dans le développement de ce projet ?

Oui, on a fait appel à certains professionnels volontaires pour l'écriture du référentiel. On a également fait appel à un cabinet d'étude externe qui a utilisé la charte européenne du tourisme durable pour les espaces protégés.

Au niveau économique, savez-vous si ce projet a créé de l'emploi ?

Pour l'instant nous n'avons pas assez d'indicateurs. Nous sommes en train de travailler sur les indicateurs de fréquentation touristique mais c'est toujours sur l'année N-1, les chiffres 2018 sont en train de sortir. C'est un peu trop tôt pour donner des chiffres car le projet date de 2017.

Evaluez-vous la satisfaction des visiteurs ?

Nous ne travaillons pas avec les visiteurs en direct. C'est à voir avec les prestataires. Nos clients ce sont les professionnels. Nous savons que la demande est là, nous savons qu'il y a des attentes à ce niveau. Nous nous sommes basés sur une étude menée par Booking qui démontre l'intérêt croissant des clients pour des hébergements responsables.

En ce qui concerne les stratégies marketing mises en place, savez-vous nous en dire un peu plus ?

Nous sommes sur une stratégie marketing au niveau du portefeuille. Nous travaillons sous la forme d'ambassadeurs de la marque Ardennes, il y en a un peu plus de 600 aujourd'hui qui sont sur le

site internet. Sur les 600, une petite centaine sont membres du club Ardennes Ecotourism et nous les aidons du mieux que nous pouvons à les valoriser à travers notre site internet. On va essayer de développer un onglet plus écotouristique.

Travaillez-vous avec des agences touristiques ?

Nous avons deux agences spécialistes de la randonnée qui sont adhérents à la marque. Sinon, nous avons une agence pour les groupes mais qui n'ont pas vraiment la démarche écotouristique dans leur offre. Sinon, nous ne sommes pas vraiment en lien avec des agences.

Et concernant les offices du tourisme, faites-vous des partenariats ?

Nous avons des contacts réguliers avec ces établissements. Deux offices du tourisme sont même membres du club Ardennes Ecotourism: un en France et un en Belgique. De plus, quand nous organisons des réunions ou des séances d'information, nous passons par les offices du tourisme comme relai sur le territoire.

Donc si je résume bien, vous communiquez via votre site internet, les offices du tourisme et les quelques agences. Et les établissements membres font également chacun leur promotion individuellement.

Oui c'est ça.

Savez-vous nous parler de votre vision long terme concernant le développement du réseau ?

Justement, on en parle à la fin du mois. Cela va être de les accompagner et d'avancer en engagement à chaque fois en proposant un accompagnement spécialisé. On a été formés à un audit écogestion, c'est à dire que nous avons la capacité de faire un diagnostic de la consommation énergétique, de la consommation en eau, du traitement des déchets et des achats de produits d'entretien et alimentaires. Que ce soit pour les établissements hôteliers, les restaurants etc. nous pouvons leur proposer un plan d'action. On consacre à peu près deux jours par établissement et cela permet d'avoir des clés. Cela pourrait être mieux mis en œuvre mais c'est difficile car cela demande du temps.

Combien de membres avez-vous dans le réseau club Ardennes Ecotourism ?

Cela change tous les jours mais aujourd'hui il y a exactement 82 prestataires pour 94 prestations différentes.

Combien de demandes avez-vous eues et combien ont abouti ? Devez-vous refuser beaucoup de personnes ?

Nous ne refusons pas beaucoup de personnes car les gens qui demandent à faire partie du réseau sont motivées par le projet. Nous avons eu 25 demandes depuis le début d'année. On refuse très peu car on ne demande que 35% des critères remplis dans un premier temps. Mais ceux qui ne correspondent pas actuellement à certains critères, on leur demande d'autres critères. Par exemple, pour un restaurant qui voulait adhérer, je l'ai refusé car il n'avait pas mis en place le tri des déchets. Quelques semaines plus tard il l'a mis en place donc je lui ai accepté son adhésion.

Connaissez-vous d'autres réseaux comme le vôtre ?

Nous adhérons à l'association des acteurs du tourisme durable en France pour avoir un retour d'expérience et voir ce qui se fait sur d'autres territoires. Nous nous sommes beaucoup inspirés de la Bretagne pour notre projet. Il y a également un réseau sur la France et l'Italie dont le nom m'échappe.

Pouvez-vous nous parler des formations que vous organisez ?

Nous sommes en train de revoir notre modèle. On fait cela pendant l'hiver, la basse saison. On était parti sur un pari ambitieux de 3 rendez-vous par mois donc un par territoire. On a eu du mal à remplir donc on va essayer de trouver un autre format car on remarque que les gens ont du mal à se déplacer. On pense notamment à un format de webinaires. On avait un peu tous les sujets comme par exemple les séjours sans voiture, un atelier de confection de produits d'entretien naturels, un atelier sur la restauration durable, l'écoconstruction, l'éco pâturage, ... Ils sont sur le site internet.

Avez-vous des noms d'établissements que l'on pourrait contacter qui se démarquent ?

Je vous conseille en particulier la Grange d'Ychippe qui se trouve à Ciney et qui s'engage dans le zéro déchet. Sinon il y a les chambres d'hôtes A Quiet Place. Je vais vous envoyer le lien avec la cartographie.

E. Marie Spaey – Green key label

Est-ce que vous savez nous rappeler votre rôle au sein d'Inter-Environnement-Wallonie et aussi en quoi vous êtes impliquée avec le label Clé Verte ?

Oui alors moi je suis chargée de mission du tourisme durable et je m'occupe de la mise en œuvre du label Clé Verte en Wallonie et sur une belle partie de Bruxelles (85%) où là, Inter-Environnement-Wallonie travaille aussi avec une autre association qui s'appelle Good Planet. Donc on s'occupe, et moi en particulier, de la labellisation. Donc ça veut dire mettre en place des dispositifs de labellisation, faire les labels à candidats (faire diffuser -en partenariat avec d'autres acteurs- les appels à candidats), accompagner les établissements, organiser les visites de contrôle sur site avec un moniteur indépendant, faire des contrôles administratifs, organiser la promotion mais là de nouveau on travaille aussi en partenariat avec d'autres acteurs et ce qu'on fait aussi qui est important c'est qu'on a la possibilité en fait d'adapter les critères internationaux qui nous proviennent de la coordination internationale du label à concurrence de l'importance des critères et donc ça on le fait également en consultant aussi des acteurs. On organise aussi les réunions du jury, je ne sais pas si vous êtes allées voir sur notre site, j'ai différentes étapes de la labellisation qui sont disponibles.

Oui, et donc vous ne travaillez uniquement qu'avec Clé Verte ? Quand vous parlez de label et cætera c'est uniquement avec Clé Verte ?

Oui c'est ça, au niveau labellisation on s'occupe de Clé Verte, on est opérateur de Clé Verte mais sur le plan plus général du tourisme durable, ce que moi je fais c'est surtout intervenir dans des événements ou des conférences et alors en plus de ça je m'occupe, enfin je donne un appui sur d'autres projets ici au sein d'inter-environnement Wallonie.

D'accord. Et du coup vous nous parliez des étapes dans le processus de labellisation donc on a un peu regardé mais on avait surtout des questions par rapport à l'attribution du label du coup est-ce que vous pouviez nous en dire plus sur le niveau de base qui est prérequis pour être certifié ? On a vu notamment que certains établissements, qui étaient peut-être très avancés dans la démarche du tourisme durable, dans la démarche de l'éco-tourisme) et d'autres établissements qui l'étaient moins, ...

Oui et est-ce que vous auriez des exemples à me citer ?

Oui par exemple le Park Inn à Liège, ou peut-être même le Radisson Blu à Spa.

Ah oui, en fait vous pouvez voir ça aussi sur notre site, on a des critères impératifs et des critères optionnels par type d'établissement. Les critères impératifs tout le monde doit les satisfaire et les critères optionnels que les établissements respectent ça à concurrence de 30% quand ils rentrent dans le processus. Et alors, dans les critères optionnels ils peuvent opter pour des critères qu'ils leur conviennent pour différents types de raisons. Alors c'est vrai que c'est un label on l'a ou on ne l'a pas et donc les labellisés il y en a qui ont beaucoup de points sur les optionnels et d'autres qui en ont moins c'est peut être ça la différence que vous constater. Après il faut aussi faire attention à ce qui à l'air d'être vert en façade. Dans les critères il y a des choses qu'on ne voit pas, qui ne sont pas visibles pour le client. Par exemple, si des établissements ont des systèmes de chauffage avec des pompes à chaleur, etc. Nous on leur demande de le communiquer mais ça ne se voit pas nécessairement. C'était ça les différences que vous constatez. Mais sur les impératifs normalement ils sont tous en ordre. C'est vrai qu'il y en a, au niveau de l'impact du label qui, lorsqu'on va les visiter, n'ont même pas leur permis environnemental alors qu'ils doivent en avoir un. Pour obtenir le label, ils vont faire la demande de permis et l'obtenir et là on a un impact massif.

Pouvez-vous m'expliquer pourquoi vous avez choisi Clé Verte et pas un autre label ?

[...] On a commencé à y penser fin 2009. Nous on trouve qu'ils se distinguent de certains systèmes de certification comme EMAS parce qu'ici on demande vraiment d'atteindre des performances. Donc il est axé sur toute une série de démarches à entreprendre mais aussi des performances précises à atteindre. Ça on trouve que ça a impact environnemental certain et alors par ailleurs on a la possibilité d'adapter les critères. C'est un label qui permet vraiment en tant qu'opérateur d'avoir un mot à dire pour définir ou améliorer les critères comme les partenariats donc on trouvait que le système était intéressant. Et le côté international qui est présent dans toute une série de pays, et en matière de tourisme c'est intéressant d'avoir un label qui n'est pas juste un label régional ou national voir qui existe juste dans les pays limitrophes. Voilà dans les grandes lignes. Au niveau du gouvernement on a commencé à être soutenu à Bruxelles. C'est le ministre du tourisme de l'époque qui avait demandé à de faire une étude sur différents systèmes de certification applicable en région bruxelloise et ils avaient aussi consultés les secteurs concernés essentiellement les hôtels et les gîtes chambres d'hôtes pour présenter les résultats de l'étude et avoir leur avis idéalement et suite à ce processus ce qui est ressorti c'est un intérêt plus particulier pour la clé verte. Je pense qu'en grande c'était parce que c'était un label international et les hôtels étaient assez actifs par rapport à leur volonté d'avoir un label international. Et alors en Wallonie, pourquoi l'Inter environnement Wallonie soutient le label clé verte ? [...] Nous ce qu'on a perçu comme intérêt,

c'était le fait que le label était déjà mis en œuvre à Bruxelles, en Flandres même avant Bruxelles. Ce qu'on a fait valoir comme argument qui a fait mouche c'est le fait qu'il est très bien implanté dans les régions émettrices de touristes vers la Wallonie : la France et les pays bas parce qu'il y a plus de chance que les touristes qui viennent en Wallonie le connaissent.

Je reviens un peu sur le processus, une fois que les établissements sont labellisés, les propriétaires interviewés nous ont dit qu'ils devaient d'année en année s'améliorer au niveau des démarches environnementales. Comment est-ce que vous contrôlez, quantifier ces améliorations ?

On préconise qu'ils s'améliorent sur les critères optionnels qui sont pas satisfaits au départ. Mais ils peuvent aussi s'améliorer sur certains critères impératifs et donc il y a un certain niveau de points qui sont repris dans le fichier Excel et donc en fait chaque année ils doivent remettre à jour le fichier et doivent modifier s'ils ont amélioré en valeurs pratiques et modifier ça dans le fichier. Généralement, on voit la façon dont ils s'améliorent d'année en année. En fait, s'ils font mieux que les impératifs ça va pas se voir sur les points donc on en tient compte aussi mais ça se traduit pas toujours en augmentation de points mais en général oui. Ceux qui ont déjà 60% des points d'entrée de jeu on leur met moins la pression parce que ils arrivent plus vite aux possibilités de ce qu'ils peuvent faire. Par ailleurs, comme les critères sont revus tous les quatre ans, les critères subissent toujours une modification dans le sens du renforcement, de facto ils sont amenés à s'améliorer tous les quatre ans.

Est-ce que vous pouvez me rappeler du nombre de points pour être labellisé de base ?

30% des points. On prend l'ensemble des points et on retire les points non applicables comme ceux qui ont attrait à une piscine, ceux qui n'ont pas de piscine ce n'est pas applicable.

Pouvez-vous nous donner plus de détails sur l'implication de l'organisation de Clé Verte internationale dans la labellisation en Belgique ? Vous êtes responsables du processus de labellisation et de contrôle ?

Il y a des règles qui nous viennent de l'internationale donc la fréquence des audits. Comme ça devient de plus en plus structuré au niveau international donc par rapport aux manières de fonctionner. Il y a aussi des visites de contrôle internationale qui sont faites pour voir si nous même on fait bien notre travail. On a des marges de manœuvre, par exemple, au niveau des libertés qu'on a c'est qu'on peut décider de ne pas prendre en compte certains types de candidatures. On ne travaille pas avec des attractions [...] où se n'est pas un secteur suffisamment porteur donc la on peut décider de la manière dont il fonctionne. Donc il y a un cadre qui nous vient de l'international.

Du coup, réalisez-vous vous même (ou quelqu'un de chez IEW) les audits des établissements ?

Non, on a un auditeur indépendant. On en a même plusieurs, c'était quelque chose à laquelle on tient parce que on veut qu'il y ait cette indépendance pour une plus grande neutralité. On voulait que pour tout le monde qui a le label il y a quelqu'un de l'extérieur qui n'a pas un intérêt direct.

Vous pouvez nous donner un exemple de ces auditeurs indépendants ?

[...] On a deux types d'auditeurs. On a celui qui fait les premiers audits pour tous les établissements pour les grandes structures de plus de 20 personnes et il travaille avec un collègue à lui en fait c'est des gens qui font des audits du type EMAS, ISO 14001 [...] Ils ont calé au niveau audit environnemental. Et puis pour les petites structures qui ont une capacité d'accueil de moins de 20 personnes la deuxième visite sur six et la visite tous les trois ans, la on forme des diplômés en tourisme durable (en général c'est de Libramont) ou alors ceux qui sont en fin de cursus. Ils font les audits et ils sont formés ils savent ce qu'ils doivent regarder, etc. Donc c'est des étudiants en tourisme durable ou en durabilité en général qui sont formés pour ça.

Au niveau des candidats, est-ce que c'est des candidatures spontanées ?

Oui on a des candidatures spontanées et on diffuse des appels à candidats via des associations professionnelles via la fédération et même plus récemment visitbrussels a diffusé des appels à candidats. [...] Puis il y a d'autres qui viennent, pour les hôtels qui font partie d'une chaîne, il y peut y avoir une demande interne pour tous les hôtels qui font partie d'un groupe essaie d'obtenir le label et donc on reçoit des candidatures via ces consignes-là.

Est-ce qu'il y a un certain cout à la candidature que les établissements doivent vous payer ?

Oui ça c'est sur le site. Et il varie en fonction de la taille.

D'accord et c'est un cout à payer en une fois ou annuel ?

Non c'est un cout annuel. Ça dépend si c'est une visite sur site d'un auditeur ou si c'est un contrôle administratif.

Est-ce que vous pouvez nous parler de la répartition du cout de ces frais ?

Il y a un fascicule détaillé dans le document qui explique tout sur notre site mais dans les grandes lignes en fait le cout est vraiment adapté sur la taille de la structure donc c'est comme une proportion des moyens si je puis dire car les grands hôtels paient nettement plus que les petites structures et en gros il y a une partie pour les petites structures mais ça ne couvre pas l'ensemble

du coup et on peut le faire parce qu'on a un subside public. Mais en gros ça couvre oui les frais de déplacement, le temps que l'auditeur passe sur site, son rapport de visite et alors la promotion. C'est une cotisation annuelle qui inclut aussi les frais de promotion qu'on fait pour eux.

Je suppose que vous êtes quasi entièrement par la région ?

On est subsidié et les cotisations qui viennent compléter voilà. C'est un budget mixte entre les deux mais c'est clair que la plus grosse partie vient des particuliers en Wallonie où on a plus de petites structures. On veut vraiment garder la labellisation ouverte à des petites structures parce que on trouve qu'en terme de durabilité c'est vraiment important d'avoir pas que des gros hôtels parce que le tourisme durable c'est aussi habiter chez l'habitant etc. Donc ça c'est une volonté un peu plus politique.

Vous parlez des chaînes qui essaient de faire labelliser tous leurs hôtels, selon le propriétaire d'un hôtel de la province du Hainaut, il aurait remarqué qu'une chaîne d'hôtel (Van der Valk) avait apposé le logo clé verte sur un hôtel de leur chaîne qui n'avait pas été labellisé. Pouvez-vous du coup nous parler de vos mesures de contrôle ? Dans ce cas là qui est ce qui contrôle ces abus ?

Quand on voit ça on nous demande de nous le rendre mais c'est compliqué pour nous d'aller sur site arracher cette plaque. Maintenant je crois que j'en ai entendu parlé mais bon je m'occupe des candidats donc je ne m'en souviens plus très précisément. Mais voilà quand ça arrive on demande qu'ils retirent la plaque etc. Et alors il y a un autre truc, en fait ils sont promus via les sites internet etc. et là bon nous, en principe, ils sont pas repris sur les sites officiels et donc si ils mettent une plaque, ce n'est qu'une toute petite partie de la promotion dont ils bénéficient.

D'accord, vu que ça n'arrive pas souvent, il n'y a pas vraiment de système de contrôle ?

Non, je pense que c'est, en tout cas le cas de mettre une plaque sans être labellisé c'est le seul cas dont j'ai eu écho en tout cas depuis les années que je travaille pour le label. Et mais je sais qu'on va être vigilant. Donc par exemple là on est repris dans le système des éco-chèques et là, il y a des hôtels qui ont tendance à dire 'C'est tout le groupe qui est labellisé.' » Nous quand on voit ça on écrit tout de suite aux sociétés émettrices (d'éco chèques) : « Attention, ils ne sont pas labellisés. » Mais après on ne peut pas aller beaucoup plus loin. Et on le dit aussi aux responsables des hôtels concernés. Mais je pense qu'il y a peu d'abus honnêtement.

Voilà je pense qu'on arrive au bout de nos questions ... Oui je voulais vous rajouter une information comme je vous disais la promotion via les sites, en fait maintenant Booking.com reprend les labels

mais là, ils demandent vraiment précisément un numéro d'identification pour attester de la validité du label, ils sont exigeants dans ce qu'ils demandent pour ne pas laisser la porte ouverte à des abus.

C'est une bonne nouvelle ! Nous n'avons pas remarqué en regardant sur Booking.com

Mais c'est nouveau !

C'est une initiative de leur part ou vous les avez contactés ?

Non, ça fait des années que nous on demande à une coordination internationale et de les contacter pour que les clés vertes soient visibles. Donc c'est assez récent qu'on soit dessus.

Pour la promotion des petits hébergements, c'est super !

Oui voilà, c'est bien vu que TripAdvisor a, je ne sais pas si vous êtes au courant, mais ils ont lancés Green Leader déjà. Donc le défi c'est de faire intégrer ces labels existants dans les gros systèmes de réservation qui sont un peu les rois de pétrole dans le secteur. Donc on est content que ça ait pu fonctionner finalement. *Nous avons aussi remarqué ce label Green Leader sur TripAdvisor, qu'est ce que vous pensez personnellement de la qualité de ce « label » ?*

Je pense que le problème surtout c'est qu'il n'y a pas un contrôle régulier et systématique en fait. Si j'ai bien compris, c'est vraiment les clients quand ils ne sont contents qui disent « Ah ben oui on nous avait dit qu'il avait de l'alimentation bio et on a constaté ça ». Mais donc c'est trop aléatoire et puis il y a souvent des gens qui ont pas le temps etc. Donc ça en terme de contrôle il y a vraiment des lacunes dans le système. Après au niveau des critères ils sont très larges c'est pas très précis au niveau des critères non plus. Après il y en a qui diront c'est plus facile d'avoir un système où les critères sont moins précis, c'est moins fastidieux de compléter, de répondre aux questions mais bon voilà. La précision des critères et le contrôle c'est assez aléatoire et peu précis.

On ne sait pas vraiment ce qu'il y a derrière non plus. Vu que c'est TripAdvisor, il n'y a pas vraiment une entité de contrôle derrière.

Maintenant, je me demande s'ils n'ont pas dit qu'ils feraient des contrôles aléatoires en tout cas c'est pas fait maintenant il faudrait vérifier mais bon voilà. *De notre part, je pense qu'on a tout ce qu'il nous faut en ce qui concerne clé verte.[...]*

Ecoutez merci beaucoup pour votre temps et une bonne fin de journée !

De rien et je serai curieuse de lire votre mémoire.

