



#### Introduction

The GSTC Certification 2025 Survey Report is based on a survey conducted to better understand the experiences, motivations, and challenges faced by GSTC-certified\* hotels and accommodations. Designed to collect both quantitative and qualitative data, the survey focused exclusively on properties with valid GSTC Certification, as of March 2025. It offers valuable insights into how certification is perceived - as a tool to strengthen sustainability performance, build customer trust, and remain competitive in a rapidly evolving hospitality landscape.

To maintain the highest level of trust in the tourism and travel industry, the results of this survey are useful measurements for the GSTC.

The Global Sustainable Tourism Council (GSTC) is truly grateful for the GSTC-accredited certification bodies (ACBs) and GSTC-certified hotels/accommodations for their longstanding support and helping make our mission a reality. GSTC will continuously focus on their concerns and priorities, while enhancing benefits accordingly.

\*Note: The term "GSTC-certified" is a shorthand for "Certified by a Certification Body that is GSTC-accredited."

## **Quotes from GSTC CEO & CAO**

These survey results confirm what we've long believed, that sustainability is not only a responsibility but also a powerful differentiator. Each GSTC-certified hotel represents a conscious choice to put purpose into practice, to protect what matters most while welcoming the world. These findings reaffirm the essential role of certification in building trust and driving real change in the tourism industry.

## **Randy Durband**

Chief Executive Officer,
Global Sustainable Tourism Council (GSTC)





In an environment where sustainability is often claimed but not always practiced, certification is crucial in distinguishing genuine commitment from mere rhetoric. It provides a thorough and independent process that not only verifies practices but also promotes ongoing improvement and longterm thinking. **GSTC** Certification introduces structure and consistency to how tourism businesses and destinations address environmental responsibility, social equity, and cultural preservation. More importantly, it fosters a mindset of accountability and shared purpose. At GSTC, we view certification as a powerful catalyst for transformation.

**Dr. Mihee Kang**Chief Assurance Officer,

Chief Assurance Officer, Global Sustainable Tourism Council (GSTC)

# Value of GSTC Certification: What Hotels Really Experience Insights From the First Global Survey of GSTC-Certified Hotels

This inaugural survey of GSTC-certified hotels provides valuable insights into their motivations for certification, the benefits realized, and overall perceptions of GSTC Certification. Conducted online from May 9 to June 30, 2025, the survey received 133 complete responses, reviewed for completeness and validity. The findings offer a meaningful snapshot of certified properties' experiences worldwide, highlighting confidence in GSTC Certification and its impact on customer trust. brand reputation, and market differentiation.

#### **Respondents' Characteristics**

- **Total respondents:** 133 certified hotels & accommodations globally
- Size: Micro 7% | Small 30% | Medium 39% | Large 24%
- Market segment: Luxury/Upscale 61% | Midscale 30% | Economy/Independent 9%
- **Property type:** Hotels 78% | Resorts 13% | B&Bs 3% | Others 6%
- **Regions:** Asia 38% | Türkiye 32% | Europe 24% | Other 6%

# Benefits Perceived, Value of Certification



73.98%

respondents shared being motivated by enhancing multifaceted sustainability beyond environmental



81.90%

**Expectations Met,** 

and High Renewal Intent

respondents value importance of the GSTC Certification



80.17%

respondents enhanced trust and credibility with customers as the most valuable benefit actually experienced



93.50%

respondents said the certification met expectation to some extent or more



35,35%



46.55%

0

62.94%

customer now inquire about sustainabilityrelated services

Based on n=133 respondents

respondents reported respondents observed revenue growth cost reduction

**Note:** All responses were reviewed for completeness and validity prior to analysis. For certain questions, the reported percentages represent the combined positive responses, including 'Met expectations to some extent,' 'Mostly met expectations,' and 'Fully met expectations.' Respondents sizes refer to: Micro 10 or less, Small 21-100, Medium 101-300 and Large 300+.

# **Objectives and Methodology**

#### **Objectives**

The purpose of this survey is to gather valuable feedback on their certification experience and the practical application of the <u>GSTC Industry Standard</u>. The survey is designed to:

- · Understand the current profile and needs of GSTC-certified hotels;
- Identify areas where we can enhance the certification communication;
- Learn how certified properties benefit from the GSTC Certification.

#### **Eligibility and Participants**

To ensure relevance, participation was limited to hotels and accommodations with valid GSTC Certification at the time of the survey. Respondents were required to be either the primary point of contact for GSTC Certification-related matters or directly involved in the certification process within their organization.

#### **Data Collection**

The survey was conducted online using a structured questionnaire and was available from May 9 to June 30, 2025. The questionnaire included a mix of multiple-choice, rating scale, and open-ended questions, covering areas such as motivations for certification, perceived benefits and challenges, and post-certification actions.

#### **Distribution**

The survey link was distributed through GSTC-accredited certification bodies, who maintain direct contact with each certified accommodation. In addition, selected GSTC member hotel groups were invited to participate via direct email. Follow-up reminders were sent periodically to encourage responses.

#### **Response Overview**

A total of 2,056 certified hotels and accommodations, including some hotel group headquarters were reached out for survey, with 133 completing the survey. Responses were reviewed for completeness and validity before analysis. Data was aggregated to ensure confidentiality and to identify overall patterns and insights.

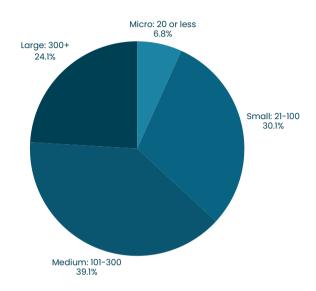
#### Limitations

While the findings provide valuable insight, it is important to note that the results reflect only the perspectives of those who responded. As with all voluntary surveys, there may be a degree of self-selection bias. However, the diversity of hotel types, regions, and certification histories represented offers a meaningful snapshot of certified properties' experiences.

# **Respondents' Characteristics**

The survey received responses from a diverse range of certified hotels and accommodations. The following provides a breakdown of the respondents:

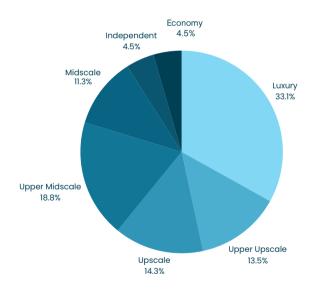
#### **Hotel Size (Number of Rooms)**



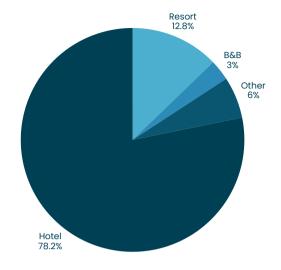
Respondents represented a mix of micro small, medium, and large-scale operations. Specifically, **39.10%** of responses came from medium-sized hotels (101~300 rooms), **30.08%** from small hotels (21~100 rooms), **24.06%** from large hotels (more than 300 rooms) and **6.77%** from micro hotels (less than 20 rooms).

#### **Hotel Segment**

In terms of market positioning, **60.90%** of respondents identified as Luxury & Upscale category (including luxury, upper-upscale, and upscale properties), **30.08%** were Midscale (including upper-midscale and midscale), and **4.51%** were from the Economy segment, and **4.51%** independent hotels.



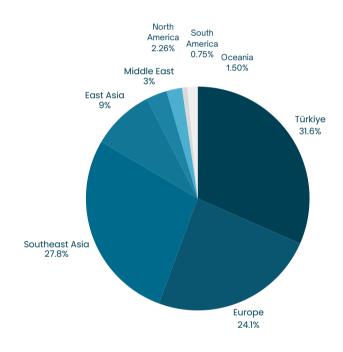
#### **Accommodation Type**



The majority of responses were from traditional hotels (78.2%), followed by resorts (12.8%), B&Bs (3.0%), and other types such as ecolodges or hostels (6.0%).

#### Region

Geographically, the survey gathered responses from hotels across various regions: **37.59%** were located in Asia (27.82% in Southeast Asia, 9.02% in East Asia and 0.75% in South Asia, respectively), **31.58%** in Türkiye, **24.06%** in Europe, **3.01%** in Middle East, 2.26% in the Americas and **1.50%** in Oceania.



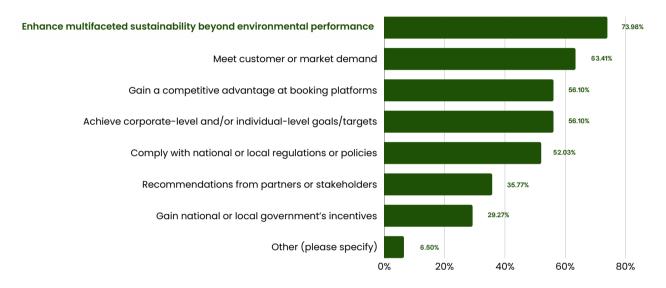
**Note:** As Türkiye is the first country in the world to mandate GSTC-accredited certification in the hospitality sector, we separate Türkiye to reflect this unique context in the analysis.

# **Benefits and Importance of GSTC Certification**

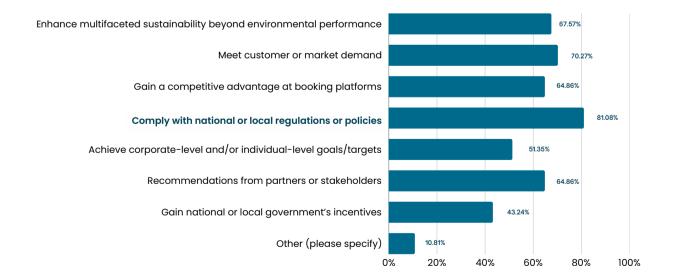
Respondents highlighted a range of motivations and perceived benefits associated with pursuing GSTC certification. The most commonly cited motivation was the desire to **enhance multifaceted sustainability beyond environmental performance**, selected by **73.98%** of respondents.

#### **Q1: Motivations for GSTC Certification**

Q1: What motivated your hotel to pursue GSTC Certification? (Select all that apply)



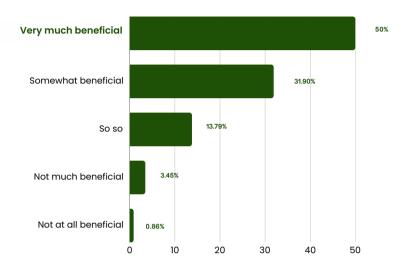
Interestingly, responses from hotels in Türkiye - the first country in the world to mandate GSTC Certification for its hotel sector, revealed a different top motivation. **81.08%** of respondents cited compliance with national or local regulations as their primary driver, highlighting the strong influence of regulatory frameworks in encouraging certification uptake.



Overall, **81.90%** of respondents consider GSTC Certification important, with **50%** rating it "very much beneficial" and **31.90%** "somewhat beneficial." This reflects strong recognition of its value across certified hotels.

#### Q2: Importance of GSTC Certification

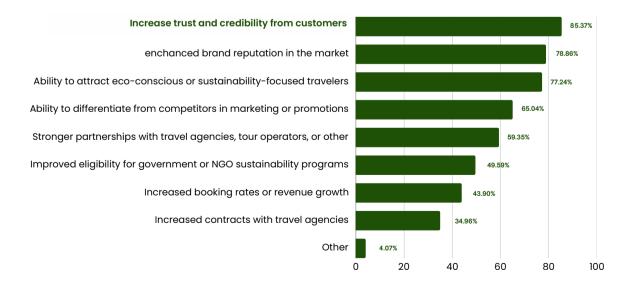
Q2: How do you evaluate the importance of the GSTC Certification for your hotel?



In terms of expected benefits prior to certification (Q3), the top anticipated advantages were increased trust and credibility from customers (85.37%) and enhanced brand reputation in the market (78.86%). Post-certification (Q6), respondents identified enhanced trust and credibility with customers as the most valuable benefit actually experienced (80.17%), indicating that the outcomes of certification generally met their expectations

#### **Q3: Expected Benefits of GSTC Certification**

Q3: What benefits did you expect to gain from certification when you applied for the certification? (Select all that apply)



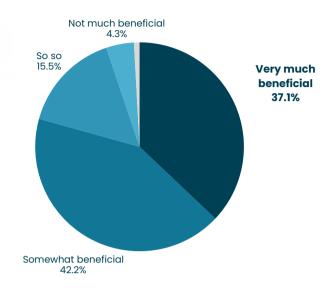
# Q4: Fulfillment of Expectations After GSTC Certification

Q4: After obtaining certification, did certification fulfill your expectations?

# Fully met expectations 39.84% Met expectations to some extent 18.7% Mostly met expectations

# Q5: GSTC Certification Benefits Perception

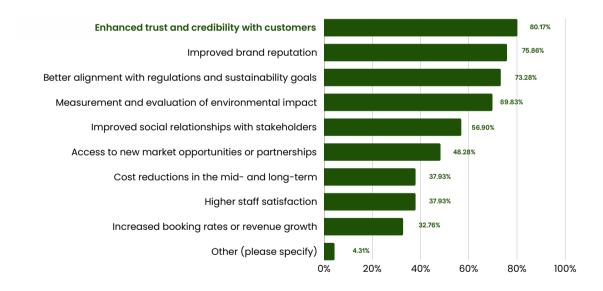
Q5: How much do you perceive the benefits of the GSTC Certification?



#### **Q6: Most Valuable Benefits of GSTC Certification**

35%

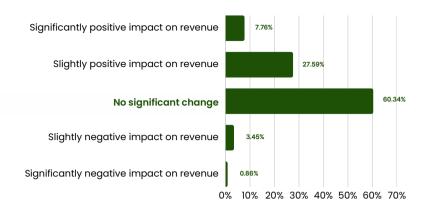
Q6: What benefits of the GSTC Certification have been the most valuable to you? (Select all that apply)



Financial outcomes from certification varied among respondents. While **35.35%** (Q7) reported revenue growth and **46.55%** (Q8) observed cost reductions, the majority experienced **no significant change** – suggesting that measurable financial benefits may take time or depend on operational context. However, **62.94%** (Q9) of respondents noted an increase (14.66% 'increased greatly' + 48.28% 'slight increase') in customers inquiring about or evaluating sustainability-related services since certification.

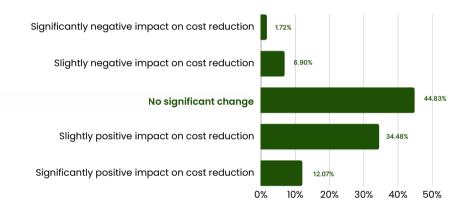
#### Q7: Measurable Growth After GSTC Certification

Q7: Have you observed any measurable revenue growth since certification?



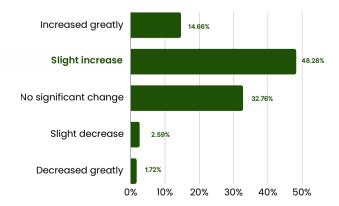
#### **Q8: Measurable Cost Reduction After GSTC Certification**

Q8: Have you observed any measurable cost reduction since the introduction of certification? (e.g., cost saving from reduced energy and water consumption, waste reduction)?



# Q9: Customer Feedback on Sustainability After GSTC Certification

Q9: Have you noticed any change in the frequency of customers evaluating or inquiring about sustainability-related services since certification?



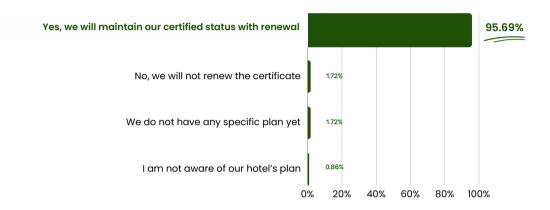
# **Looking Forward**

Overall, certified hotels see GSTC Certification as a valuable asset - **85.37%** cited increased customer trust as the top benefit, along with market advantages like enhanced brand reputation in the market, and appeal to eco-conscious travelers. **95.69%** of them report that they will renew for the next term\*.

With a shared belief in its importance, respondents also pointed to areas where future efforts could strengthen impact.

#### **Q10: GSTC Certification Renewal Intention**

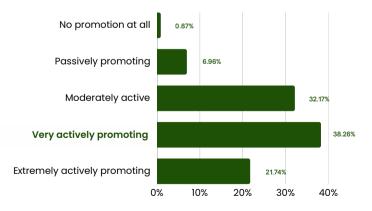
Q10: Is your hotel going to maintain and renew the certification?



#### **Q11: Promotion of GSTC Certified Status**

Q11: How much do you promote your certified status?

About **60%** (Q11) of respondents actively promote their certified status (38.26% 'very actively promoting' + 21.74% 'extremely actively promoting'). However, over **70%** believe GSTC should play a stronger role in promoting the value of GSTC Certification, especially by raising public awareness of certified hotels. This underscores the need for stronger, centralized promotional efforts beyond what individual organizations can achieve.



<sup>\*</sup>Note: GSTC Certification operates on a 3-year cycle, while in Türkiye program, the certification is only valid for one year.

# **Key Takeaways for the Future**

This survey offered valuable insights into how certification holders engage with and perceive the GSTC Certification. The findings show a strong commitment to promoting certified status, while also highlighting the need for greater centralized support, particularly in raising public awareness of GSTC Certification within the tourism market.

When asked which areas GSTC should prioritize, respondents most frequently identified:

- Promoting GSTC-certified hotels (75.68%);
- Promoting GSTC Certification to increase tourism market awareness (72.97%);
- Increasing awareness about GSTC and its activities (63.06%).

Other areas included enhancing promotion through the GSTC Market Access Program (55%) and improving accessibility for micro and small businesses (31%).

These results underscore the shared responsibility between certified organizations and GSTC to strengthen the visibility and impact of certification. Moving forward, the GSTC will continue expanding market access for certified entities and enhancing brand awareness across the industry.

As this was the first time conducting this survey, the GSTC deeply appreciates the participation of all certified hotels, as well as the support from accredited certification bodies in helping distribute it. The insights shared by GSTC Hotel Certification holders are instrumental in shaping the organization's priorities to better align with their needs and interests. This feedback will guide GSTC's ongoing efforts to fulfill its mission: to be an agent of change in the world of sustainable travel and tourism.

Looking ahead, GSTC will actively consider the input provided and implement initiatives that deliver greater value for stakeholders. GSTC also recognizes the importance of broad participation and is committed to improving response rates in future surveys to ensure more comprehensive insights.

The GSTC would like to express its gratitude to all respondents for their invaluable contributions to this evaluation.

#### About the GSTC

The Global Sustainable Tourism Council® (GSTC®) establishes and manages global sustainable standards, the GSTC Standards, also known as the GSTC Criteria. The GSTC Destination Standard for public policy-makers and destination managers, GSTC Hotel Standard & GSTC Tour Operator Standard, GSTC MICE Standard for Venues, Event Organizers, and Events & Exhibitions, and the GSTC Attraction Standard for tourist attractions such as theme parks, museums, and national parks. These are the guiding principles and minimum requirements that any tourism business or destination should aspire to reach in order to protect and sustain the world's natural and cultural resources while ensuring tourism meets its potential as a tool for conservation and poverty alleviation.

The GSTC Standards form the foundation for GSTC's assurance role for Certification Bodies that certify hotels/accommodations, tour operators, and destinations as having sustainable policies and practices in place. GSTC does not directly certify any products or services but provides accreditation to those that do.

GSTC is an independent and neutral USA-registered 501(c)3 non-profit organization that represents a <u>diverse and global membership</u>, including national and provincial governments, leading travel companies, hotels, tour operators, NGOs, individuals and communities – all striving to achieve best practices in sustainable tourism. The GSTC is an <u>ISEAL Community Member</u>, a global membership organization for ambitious, collaborative, and transparent sustainability systems, as well as an <u>Association Member of The International Accreditation Forum (IAF)</u> and an Associate Member with the <u>Inter-American Accreditation Cooperation (IAAC)</u>.

#### **Relevant links:**

More information about Accreditation here: <a href="https://www.gstc.org/accreditation/">https://www.gstc.org/accreditation/</a>
Read more about Certification here: <a href="https://www.gstc.org/certification/">https://www.gstc.org/certification/</a>
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