

# DEMAND FOR CERTIFICATION: TOURIST INDUSTRY AND MARKETING EXPERTS

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A publication of  
Center on Ecotourism and Sustainable Development  
The International Ecotourism Society  
September 30, 2004



For:



**Activity 3.1.1.3: Marketing certification**  
*A component in the IDB-MIF project, "International Accreditation System and Consolidation of National Systems for Sustainable Tourism Certification to Facilitate Small and Medium Enterprises' (SMEs) Competitiveness and Market Access"*

## **ABSTRACT**

U.S. consumer demand for environmentally sensitive tourism is on the rise. Some would go as far as to say that is the “fastest growing segment of the tourism industry.” Even if that is true, there is a major terminological problem hindering efforts at developing reliable statistical methods to account for ecotourism and sustainable tourism. From a demographic standpoint, “US ecotourists range in age from 18 to 65+years, with the mean being 43 years point.” Most of them are growing increasingly environmentally conscious, but that has yet to translate into a demand for sustainable and ecotourism certification. Indeed, certification only seems to have had an impact on the supply side, which is no small achievement.

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## ***INTRODUCTION***

The purpose of this report is to **determine current US consumer demand for sustainable and ecotourism and certification**. All of the research, questionnaires and interviews for this project activity were designed and carried out during the summer of 2004 from TIES headquarters in Washington DC.

## ***METHODOLOGY***

The research involved both primary and secondary data sources.

**Primary research** included: i) TIES-designed surveys conducted among outbound ecotourism operators, educational and study travel programs, and responsible tourism and travel websites; ii) and phone interviews with tourism boards of the 5 target countries and other marketing specialists.

The following US and Canada based ecotourism operators were contacted owing to their ecotourism nature and coverage of the five target countries: Lindblad Expeditions, International Expeditions, Costa Rica Experts, Wilderness Travel, Wildland Adventures, Gap Adventures, Journeys International, Adventure Life, Myths and Mountains, Island Expeditions, Latin American Escapes, Geographic Expeditions, and Zeghram Expeditions. Only six out of a total of thirteen – *International Expeditions, Adventure Life, Holbrook, Wildland Adventures, Myths and Mountains, and Gap Adventures*—answered TIES survey.

Seven educational and travel study programs were contacted – *American Museum of Natural History, Smithsonian Journeys, Nature Conservancy, World Wildlife Fund, Audubon Society, Sierra Club, Stanford Alumni Travel Program* – of which only the first five answered TIES survey.

Seven travel and responsible tourism websites were contacted – *Away.com, Responsibletravel.com, Iexplore.com, greenhotels.com, ecoclub.com, ethicaltraveler.com, greenstop.net* – but only the first two answered TIES survey.

Also, a number of tourism marketing specialists were invited to share their expertise for this project, including Barry Roberts, Jose Cabada, Mason Fisher, Crist Inman, and Pam Wight.

**Secondary research** included a review of the ecotourism literature on world trends, the US market and the five target countries—Costa Rica, Guatemala, Belize, Ecuador and Brazil

## RESULTS AND DISCUSSION

### ☞ TERMINOLOGY AND STATISTICS

- In trying to determine consumer demand for sustainable and ecotourism and certification, the first major problem that arises is one of terminology. The term ‘ecotourism’ means different things to different people. Most tourism boards and marketing people seem to equate it with ‘nature-based tourism’, largely due to the success of Costa Rica’s in positioning the whole country as an ecotourism destination based on its nature assets. Tour operators also use the term loosely along with adventure travel and nature-based tourism. By contrast, ecotourism and sustainable tourism are primarily used by NGOs, both local and international, working to promote socially and environmentally responsible tourism.
- According to U.S. tour operators<sup>1</sup>, the most important characteristics of ecotourism are on a scale from 1 to 6, with 1 being the most important, are:
  1. Minimizes negatives impacts
  2. Nature appreciation
  3. Promotes conservation
  4. Education and interpretation
  5. Local economic benefits
  6. Cultural appreciation
- The absence of widely accepted definition of ecotourism has in turn led to a lack of both current and reliable statistics. Marketing studies usually measure attitudes and do so within the broader category of active or adventure travel. For their part, tourism boards survey the activities tourists engage in, but don’t account for ecotourism as a special category. Furthermore, tourism boards are paying increasing attention to the ‘**tourism satellite account,**’ a framework used to measure the true economic contribution of tourism to gross domestic product (GDP). The emphasis in a TSA is on measurement of expenditure in by resident and non-resident tourists, and on the size of the tourism industry, including its contribution to GDP and employment. The methodology used in *Tourism Satellite Account* follows international guidelines developed by the World Tourism Organization (WTO)
- Statistics for the total number of tourists traveling to the five target countries, as well as the percentages for the US and Canadian tourists were obtained from the national tourism boards. By contrast, the figures for ecotourism arrivals were put together by the author of this report following consultations with national tourism boards, in bound tour operators, national ecotourism associations, and marketing specialists. Consequently, the ecotourism figures presented on this table are intended only as an approximation to reality.

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<sup>1</sup> World Tourism Organization. *The US Ecotourism Market*, 2002

**Table 1: Tourism and Ecotourism arrivals in the 5 target countries originating from the U.S. (2002)**

|                               | <b>Costa Rica</b> | <b>Guatemala</b> | <b>Belize</b>  | <b>Ecuador</b>  | <b>Brazil</b>    |
|-------------------------------|-------------------|------------------|----------------|-----------------|------------------|
| <b>TOTAL TOURISM ARRIVALS</b> | <b>1,113,359</b>  | <b>400,000</b>   | <b>199,521</b> | <b>682,962</b>  | <b>3,783,400</b> |
| <b>U.S. only</b>              | <b>38%</b>        | <b>48%</b>       | <b>52.4%</b>   | <b>40%</b>      | <b>17%</b>       |
| <b>Canada only</b>            | <b>4.4%</b>       | <b>6%</b>        | <b>4.6%</b>    | <b>5%</b>       | <b>0.1%</b>      |
| <b>ECOTOURISM ARRIVALS</b>    | <b>458,704</b>    | <b>280,000</b>   | <b>79,808</b>  | <b>145,783*</b> | <b>290,000</b>   |
| <b>U.S.</b>                   | <b>37.5%</b>      | <b>45%</b>       | <b>50.4%</b>   | <b>40%</b>      | <b>11%</b>       |
| <b>Canada</b>                 | <b>5.6%</b>       | <b>8%</b>        | <b>5.8%</b>    | <b>5%</b>       | <b>1%</b>        |

\*At present, 80% of the ecotourism market to Ecuador visits only Galapagos.

- According to *The US Ecotourism Market* (2002) study by World Tourism Organization (WTO), of 18.6 million US residents traveling for leisure to overseas destinations in 2002, 5% or 930,000 can be considered “ecotourists.” This study draws on the 2002 US Department of Commerce ‘In-Flight Survey’ data. WTO regards “leisure tourists that participated in environmental or ecological excursion” (*one of the categories surveyed by the In-Flight Survey*) as the best proxy for ecotourism. “This suggests that the US International Ecotourism market is smaller than generally believed and is growing at only about the same rate as tourism overall.”
- By contrast, the study *Geotourism: The New Trend in Travel* (2003) by the Travel Industry Association of America (TIA) and National Geographic Traveler, found that “55 million American travelers are inclined to exhibit geotourism attitudes and behaviors.”
- All experts interviewed for this project activity agree that the definition used by WTO is too narrow and that the ecotourism market is the fastest growing segment of the tourism industry.

## ☞ **THE NATURE OF THE U.S. ECOTOURISM MARKET**

### **Market Trends**

The following are the most significant trends in the U.S. ecotourism market arranged by source.

- **Quotes from interviews with marketing specialists:**
  - “The active travel segment of the tourism industry is growing and baby boomers are driving this market.”
  - “Over the last 5 years, Internet has changed the travel industry fundamentally, how consumers research and book their vacation. Already of 20% of all leisure travel transactions are done online, and in 2006 that will claim to 35%. Currently, the Internet is the number one place to research and plan travels.”
  - “The baby boomers are currently driving demand more out of financial means than loyalty to the tenets of ecotourism....both generation X and Y are more demanding in terms of true ecotourism products and when they come of financial age, they will be in the driver’s seat.”
  - One expert believes that online travel providers like Explore and Away.com will not catch on because ecotourists want handholding, more of a personal connection.
- ***The US Ecotourism Market. World Tourism Organization, 2002.***
  - “The top 3 geographic destinations of U.S. ecotourists in 1999 were Central America (30.9%), Western Europe (16.7%) and South America (12.4%)<sup>2</sup>. This ranking is consistent with that of the Geotourism study for 2003.”
  - “The U.S. regions with the highest participation rates in ecotourism type activities are the Pacific (27.9%), Middle Atlantic (20.5%), South Atlantic (13.9%) and New England (9.6%).”
- ***A Review of International Markets, Business, Finance & Technical Assistance Models for Ecolodges in Developing Countries.*** (prepared by Eplerwood International for the International Finance Corporation, 2004)
  - “Until September 2001, tourism had been on the rise for years, with a 9% annual growth rate recorded by the World Tourism Organization from 1988-1997. Many important ecotourism destinations were experiencing double digit average annual growth between 1986 and 1998 (e.g., Ecuador 17%, Costa Rica 32%, and Belize 25%).”
  - “U.S. travel overseas in the 2 years after the terrorists’ attacks declined 13%. In 2002, travel to Central America declined 2% while travel to South America declined 11%.”

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<sup>2</sup> World Tourism Organization. *The US Ecotourism Market*, 2002.

- “Travel to Central and South America increased significantly up in 2003 according to WTO, due to perceived political and economic stability in the region. Key ecotourism countries were all reporting market increases. In 2003, travel to Ecuador was up 15%, Peru 3%, and in Central America, Belize was up 10% (Costa Rica did not report).”
- “Central and South America are most known among North American ecotourists for their rain forest attractions. In general, wildlife viewing is rated as the most important activity for ecolodge travelers. “

**Table 2: Preferred Developing Country Destinations among Americans and Canadians.**

| Markets              | Developing Country Destinations Preferred   |
|----------------------|---|
| <b>Canadians</b>     | <ul style="list-style-type: none"> <li>• For future ecotourism trips, international destinations were:               <ul style="list-style-type: none"> <li>-3% South/Central America</li> <li>-2% Caribbean</li> <li>-2% Mexico</li> <li>-7% other destinations</li> </ul> </li> </ul>   |
| <b>United States</b> | <p>Outbound travelers (in-flight survey of those participating in environmental or ecological excursions)</p> <ul style="list-style-type: none"> <li>•               <ul style="list-style-type: none"> <li>-31% C. America</li> <li>-12% S. America</li> <li>-12% Caribbean</li> <li>-10% Oceania</li> <li>-10% Asia</li> <li>-5% Africa</li> <li>-3% Middle East</li> </ul> </li> </ul> |

Source: Eplerwood, Wight, and Corverto. *A Review of International Markets, Business, Finance & Technical Assistance Models for Ecolodges in Developing Countries*. Prepared for the International Finance Corporation, 2004.

**Table 3: North America Ecotourism Markets Trends.**

|   |
|---|
| <ol style="list-style-type: none"> <li>1. Growth in domestic and international trips by seniors has outpaced most age groups, particularly in international trips. Seniors are more likely to travel alone, take longer trips (especially in off-season) and senior females predominate in international travel</li> <li>2. The key age group traveling overseas is 55-64, followed by 65+</li> </ol> |
|---|

3. Europe was the most popular destination for senior travelers
4. Interest in parks becomes higher, the further North Americans travel from home.
5. Group tours related to ecotourism are growing
6. Soft adventure is growing, especially for generalist markets. This requires: more amenities; higher service levels; activities requiring lower specialist skills; and more responsibility/care by the operators
7. Growth of women-only tours - 230% in last 6 years
8. Growth in *special* interest trips
9. Growth of specific outdoor activities (e.g., hiking, cycling, boating, kayaking, watersports)
10. Increased interest in educational trips (or ed-ventures) with learning through thematic tours, educational tours, learning travel programs, or general interest learning, all requiring quality interpretation
11. More creation of customer-unique customized tours for markets as small as one individual.
12. Ecotourists increasingly feel the need to be uniquely catered to, and are less and less interested in “roughing it.”

Source: Eplerwood, Wight, and Corvetto. *A Review of International Markets, Business, Finance & Technical Assistance Models for Ecolodges in Developing Countries*. Prepared for the International Finance Corporation, 2004.

Eplerwood, Wight and Corvetto also underline a number of constraints and shortcomings that may be shaping market trends on the supply side:

- “The supply side constraints for LDCs are the lack of rural infrastructure that limits efficient access to important wildlife viewing areas, environmental degradation, and poor government planning of tourism and ecotourism.
- In Central and South America “there seems to be a gap between community-run, basic facilities, and high-end lodges. Whereas demand is in the middle, more conventional, comfortable part of the spectrum. Thus supply and demand seem mismatched.”
- What’s more, “in Central America, most community-run basic facilities are simply not financially feasible for a range of reasons, from being extremely remote, to being run by NGOs, or attracting lower-paying backpacker markets..... Such lodges are so small they cannot establish the kind of relationship with the travel trade required, so they become marginalized from the conventional marketing system.”
- Mesoamerica therefore lacks adequate legal and policy framework to encourage locally owned small and medium enterprises (SMEs) or regulatory means of resolving land-use conflicts and environmental management issues resulting from unplanned tourism growth -- except in protected areas. The well-funded NGO community in the region is strong, but has not made

government policy a priority – except for the certification of business – an approach which has not been shown to improve business competitiveness or marketability anywhere in the world.

## ☞ **CHARACTERISTICS OF U.S. ECOTOURISTS**

### ▪ **Consumer Profile**

- Based on **TIES survey of U.S. tour operators**, the consumer profile of ecotourists traveling with them is as follows:
  - Most are aged 30 through 65, and have completed higher education. All generally would appreciate a green ‘seal of approval’, however that would not necessarily drive their choices.
  - They come to tour operators through a variety of ways. These are in order of importance: 1) word of mouth, 2) website, 3) repeat visitors, 4) company promotional literature.
- Based on **TIES survey of U.S. educational and travel study programs**, the consumer profile of ecotourists traveling with them is as follows:
  - Most of them are members of the organizations that sponsor these travel programs. They are affluent and very well educated. All generally would appreciate a green ‘seal of approval’, however that would not necessarily drive their choices.
  - Ecotourists come to educational travel programs through various ways. These are in order of importance: 1) direct email 2) repeat visitors 3) word of mouth, 4) company promotional literature.
- Based on **TIES survey of travel and responsible tourism websites**, the consumer profile of ecotourists traveling with them is as follows:
  - Most of these are geared to “foreign independent travelers” (FIT), that is, travelers who book their vacation directly with inbound tour operators or final destination providers.
  - These FIT are united by “a love of travel, sense of curiosity and adventurous spirit.” While a small number are very ethical, most are ‘light-green’.
  - Online travel companies are constantly tracking their customer’s interests and preferences. If they are not emphasizing the responsible travel aspect of the vacation more, it’s because consumers still don’t attach much importance to it.

- According to the study *The US Ecotourism Market. World Tourism Organization, 2002*, from a demographic standpoint, “US ecotourists range in age from 18 to 65+years, with the mean being 43 years. Also, both generations X and Y (18-34 years) and the 55-74 generation are more likely to participate in ecotourism than the baby boomers (35-54) relative to their overall weight in outbound travel<sup>3</sup>”. The mean income of U.S. ecotourists in 1999 was \$106,200 compared to a median of \$88,600.
- According to the study *A Review of International Markets, Business, Finance & Technical Assistance Models for Ecolodges in Developing Countries*. (prepared by Eplerwood International for the International Finance Corporation, 2004), the **socio-demographic characteristics of North American tourists are as follows:**

|                         |   |
|-------------------------|---|
| <b>Gender</b>           | slightly more women than men, ~ 55% female: 45% male  |
| <b>Age</b>              | <ul style="list-style-type: none"> <li>- Canadians: middle aged (1/4 are 45-54) and older (1/3 are 55+)</li> <li>• US: Edu-travellers span all ages, with ¼ aged 35-44 and &gt;1/3 aged 55+</li> <li>• US Geo-Savvy travelers are 50% baby boomers, 1/3 are older parents/working older couples</li> <li>• US ecotravellers are older (40% are 50-61, and 1/3 are 62+)</li> </ul> |
| <b>Household</b>        | <ul style="list-style-type: none"> <li>~ 45%are married couples, with about 1/3 being single</li> <li>• often 1/3 families</li> </ul>   |
| <b>Education</b>        | <ul style="list-style-type: none"> <li>High levels of education in all ecotourists and Geo-savvies (~80% are graduates)</li> <li>• Edu-travellers slightly less educated (~60% are graduates)</li> </ul>  |
| <b>Occupation</b>       | 1/3 professionals, many still in school   |
| <b>Household income</b> | <ul style="list-style-type: none"> <li>• quite affluent, although substantial proportion with lower incomes</li> <li>• Edu-travellers 1/3 &lt;US\$50,000</li> <li>• Ecotravellers &gt;1/2 US\$38,500-\$62,000</li> <li>• Some very high income travelers (28% edu-travellers &gt;US\$100,000; US geo-savvies 38% &gt;US\$75,000; Canadians: 36% &gt;Cbd\$70,000)</li> </ul>       |
| <b>Travel Party</b>     | <ul style="list-style-type: none"> <li>• ~50% Ecotravellers and ecotourists are couples (on tour), -20% single</li> <li>• 70% of Edu-travellers prefer to travel FIT, 30% prefer groups</li> <li>• the percentage traveling with children is increasing (33% in 1991, 45% in 1999)</li> </ul>   |

This study also offers two important findings:

- “Studies of the U.S. market reveal a distinct **gap between consumer concern about environmental and social issues and their actual behavior** when selecting tours or other products, indicating there is a ‘green skew’ in many market surveys and that eco-social concern is not an important market driver.”
- “Notwithstanding the previous point, environmental consciousness will continue to increase, resulting in more demand for sustainable destinations, where nature and local peoples will play an increasingly prominent role.”

- **Motivations of US Ecotourists**

Findings from TIES survey of tour operators:

- The most popular activities among US ecotourists traveling with them are: nature observation and interpretation, adventure sports, cultural visits and sightseeing.
- Most important criteria for selecting tour operators are: 1) reputation for quality and safety, 2) destinations and activities covered, 3) price, 4) overall concern for responsible travel.
- Most important criteria for evaluating sustainability of destination or tour operator: 1) contributions to conservation 2) returns to the local community.

Findings from TIES survey of U.S. educational and travel study programs:

- The most popular activities among US ecotourists traveling with them are: nature observation and interpretation, adventure sports, cultural visits and sightseeing. In educational tours, conservation and environmental education tends to be especially high.
- Most important criteria for selecting tour operators are: 1) destinations and activities covered 2) Reputation for quality and safety 3) overall concern for environmental and socially responsible travel.
- Most important criteria for evaluating sustainability of destination or tour operator: 1) contributions to conservation 2) returns to the local community

These findings clearly show that sustainable tourism considerations are not a priority issue for tourists in the planning of their vacation. This is also backed up by interviews with online travel providers. According to one of them, while more and more consumers

are interested in issues of environmental protection, they are only going to make a responsible purchasing decision if of all the other factors (location, quality, service, safety, reputation) are present. This expert made an analogy with organic food: “twenty years ago organic foods were sold only in coops while now you also have Whole Foods, which has succeeded in integrating organic foods into a broader experience...The organic food market is now much greater than people buying at coops.”

So do US travelers care more today about conservation and the well being of local communities to the extent that they would be willing to pay a premium to travel responsibly? One ecotourism expert answered this question for us: “There’s no statistical data to prove it, but as business person I think so. Also, according to local entrepreneurs’ assumption of market growth, they are investing more heavily in this segment...-Costa Rica tourism arrivals grew by 30% in last high season. Part of the reason demand has grown is that US tourists are more interested than ever in sustainable destinations, in ecologically responsible tourism.”

According to the study by Epler Wood, Wight and Covetto, the motivations of US ecotourists can be broken down into 3 categories:

**Table 3: Motivations of US Ecotourists**

|                         |   |
|-------------------------|---|
| <b>Macro trends</b>     | Operators agreed that the primary motivations were wildlife and culture.  |
| <b>Secondary trends</b> | After deciding on where to find their primary special interest, visitors select the specific accommodation/destination. Access in the destination is important. For example, visitors may sacrifice one or two travel hours in order to improve the quality of nature they experience, but few are willing to sacrifice 5 hours of travel to a remote area. It is the same with comfort, although luxury is not needed. Quality interpretive guides and small group sizes are important too |
| <b>Tertiary trends</b>  | Visitors only consider the issue of environmentally sensitive practices or architecture when all other considerations are taken care of, e.g. special interests of nature and culture; access of the accommodation, comfort level, activities available, and guides. Then they may begin to look at such features.  |

Source: Epler Wood, Wight, and Corvertto. *A Review of International Markets, Business, Finance & Technical Assistance Models for Ecotourism in Developing Countries*. Prepared for the International Finance Corporation, 2003.

- **Market Segments**

One of the most complete segmentation<sup>4</sup> studies of American Travelers is the report *Geotourism* by the Travel Industry Association and National Geographic. This report segmented American travelers into eight distinct market segments based on: consumer's general attitudes about traveling for leisure; their travel preferences; their civic, environmental and culturally-oriented practices in the local area; membership in various affinity groups; and their attitudes about tourism's impact on the local area. According to this study, 55.1 million Americans out of a total of 154 million American travelers share similar attitudes and beliefs about preserving and protecting destinations

Depending on whether ecotourists travel alone or in group, we can distinguish between individual travelers--commonly referred to as foreign independent travelers--and group travelers. According to one the marketing specialists interviewed by TIES, "the Internet has had a big impact on the growth of individual travel, but group-travel with outbound tour operators remains strong. We will be devoting increasing resources to group travel."

These views are echoed by Eplerwood, Wight and Corvetto who maintain that "U.S. travelers are increasingly traveling independently, because of the amount of information obtainable on destinations on the internet. Statistics show that U.S. independent travel is growing in developing countries, particularly in destinations closer to home, such as Mexico, Belize, and Costa Rica."

- **Industry views about certification.**

The following are some views about certification from the tour operators, travel study programs, and marketing specialists interviewed.

- The most insightful interview was with a marketing expert and ecotourism businessman currently based in Costa Rica. His reflections are most compelling:

"The demand side of the ecotourism market does not care about certification...the purchase decision is not significantly impacted by certification. Investment in certification has not paid off in a market way. By contrast, on the supply side, the effect of certification has been profound. There's plenty of evidence that certification has made a big difference in how entrepreneurs on the ground think about how to get an ecotourism business up and running, in how other tour operators have thought about how serious we are about sustainability...All in all,

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<sup>4</sup> To segment is to divide the potential market of a product or service into a number of subgroups, as homogeneous as possible, according to one or more factors.

CST has influenced the way the tourism industry thinks about sustainability in Costa Rica, so the net benefit has been positive....

...The time has not come yet to promote certification on the demand side. Besides, we do not want to be sharing the shortcomings of certification schemes with the rest of the world.

...In terms of financial performance, certification has had a neutral impact. Eco-efficiency and the financial costs associated with it have even each other out. There also bureaucratic cost...All in all, you are not making a profit but not loosing money either. Essentially, you are doing it for conservation.”

...More promotion of certification should be in-house. The ICT of the five target countries should promote it within the hospitality sector. The implication is as follows:

-If effectively promoted internally, when one thinks of Costa Rica, he will think country of conservation.

-ICT should be telling the hotel sector across the board that we should be consistent about how we operate our hotels (different from Cancun). If we all operate according to CST, we can use ICT promotion budget more effectively.

-ICT would be better off promoting standards internally.

- Don't need to certify ecological sensitivity if we are doing it. Consumers have common sense.”

- One tour operator and marketing specialist with operations both in the US and Costa Rica also spoke his mind about certification:

“Consumers do not make their decisions based on certification but comfortable accommodations, good guides...TIES should rather concentrate on distributing responsible tourism guidelines among tour operators, recognizing in-country outfitters for excellence, educating consumers and business, especially through travel guidebooks, and coming up with its own awards program...

...Ecotourism is still an elitist term in terms of its target audience. However, many people practice it without knowing it and they are the ones who will resist paying a premium for a certified ecotourism trip.”

- Another marketing-expert and former government official also provided useful insights into ecotourism and certification:

“Ecotourism is a demand-driven industry. That being said, one has to work at the same time on both ends of the tunnel: on the demand side, both educating US tourists and targeting wholesalers and tour operators and on the supply side,

making sure that the tourist gets a first-class experience so that he/she will become a more convinced eco traveler.”

## **CONCLUSIONS & RECOMMENDATIONS**

- The lack of statistics on ecotourism, as well as the varying consistency and reliability among those that exist out there, present a unique opportunity for international NGOs to develop a statistical capability to account for ecotourism. This would undoubtedly go a long way in attracting more attention to this tourism segment as well as increasing the credibility and visibility of both local and international NGOs.
- Before you market ecotourism and sustainable tourism certification, you have to make sure the end consumers understand what these terms mean.
- Though more and more travelers are concerned with issues of environmental protection, sustainable tourism is not the prime ingredient of their purchasing decision but just one more part of the mix.
- According to consultant Pam A. Wight (2001), “above all ecotourists are experienced traveler who are paying for quality and personalized service, such as well trained guides.”
- Consistency between the product sold to ecotourists and the actual experience in the destination is also critical for ecotourism growth
- The results of the interviews point out that certification has had a much larger impact on the supply side of the ecotourism market than on the demand side. In fact, there’s no evidence that tourists’ purchase decision may be impacted by certification.
- Finally, Ecotourism has up until now been mainly geared to an educated, high purchasing power niche of the tourism market. Even though there are ecotourism products for all budgets, it’s essential to expand the customer base of ecotourism.

## **Appendix 1**

**Activity 3.1.3.1:** Questionnaire developed and combined with Questionnaire in 3.1.1.3 for businesses, certification program practitioners, government officials, community and indigenous organizations, and NGOs.

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### **QUESTIONNAIRE #1**

#### **For Use With Consumer Demand Experts And Consumer Advocacy Organizations**

We are asking for your participation in answering a few questions. The questions are part of a study being conducted by The International Ecotourism Society under a contract with the Inter-American Development Bank. The purpose of the study is to increase the competitiveness of Small- and Medium-size Enterprises (SMEs) in the tourism sector that are following sustainable tourism practices. The purpose of this questionnaire is to gather information on how to best market tourism certification so that it can be more effective in promoting sustainable practices by these SMEs.

Most travelers pick destinations and suppliers primarily on the basis of destination appeal, quality of services, health and safety, price, etc., but a subset of the market will also be influenced by sustainability issues. We are trying to determine how large this socially responsible travel segment is, who these travelers are, and what messages they are most likely to respond to. In addition, we are exploring the best ways to encourage use of sustainable certification programs by the broader mass travel market, which is generally less concerned with sustainability issues.

1. There seems to be a substantial gap between the importance that travelers claim to put on environmental and social concerns and their actual travel choices. In your estimation, what percentage of all travelers are likely to give significant weight to the sustainability practices of tourism service suppliers in making their actual travel decisions?
  - Less than 5% \_\_\_\_,
  - Between 5% and 10% \_\_\_\_,
  - Between 10% and 20% \_\_\_\_,
  - More than 20% \_\_\_\_.
  
2. Are you aware of any research that systematically evaluates the importance of sustainability considerations in actual travel decisions instead of stated intentions in survey questionnaires?
  
3. How rapidly do you believe that this socially responsible travel market segment is growing?
  - Less than 5% per year \_\_\_\_,

- Between 5% and 10% \_\_\_\_\_,
  - Over 10% per year \_\_\_\_\_.
4. Are you aware of any research that would provide statistical evidence of the rate of growth in the socially responsible travel market segment?
5. What specific travel market segments do you believe are likely to be especially responsive to sustainability considerations and, therefore, attractive targets for marketing certification programs?
- Various specialty markets (e.g. educational or ecotourism)?
  - Independent versus group travelers?
  - Various nationalities?
  - Business (through corporate travel departments) versus leisure travelers?
6. Which sustainability considerations are likely to be most important to the socially responsible traveler when selecting a destination or tour operator? **(Please rank high, medium, low)**
- On-site green technologies /eco-efficiency (e.g., energy and water conservation, waste management practices) \_\_\_\_\_,
  - Broader nature conservation efforts (protecting endangered environments or wildlife) \_\_\_\_\_,
  - Generating local economic benefits and reducing local poverty \_\_\_\_\_,
  - Preserving local social and cultural resources \_\_\_\_\_,
  - Other (please specify) \_\_\_\_\_.
7. How important are the various sources of information on the sustainable practices of destinations, suppliers and operators to the socially responsible traveler? **(high, medium, low)**
- Personal experience \_\_\_\_\_,
  - Word of mouth \_\_\_\_\_,
  - Travel agents and tour operators \_\_\_\_\_,
  - Travel press \_\_\_\_\_,
  - Guidebooks \_\_\_\_\_,
  - Company promotional literature \_\_\_\_\_,
  - Formal certification programs \_\_\_\_\_,
  - Other \_\_\_\_\_.
8. For the socially responsible traveler, do you believe that interest in sustainability is sufficiently high to support certification programs that just cover sustainability issues or do you think it would be more effective to try to combine them with broader quality rating systems (e.g., star ratings)?

9. Do you have first-hand knowledge about any certification programs that deal directly with the sustainability aspects of tourism? Which ones?
10. How effective do you believe that they have been in terms of raising consumer demand for sustainable travel? (**high, medium, low**)
11. How effective to you believe various travel intermediaries are likely to be in marketing certification programs to consumers because of their credibility with consumers, commitment to sustainability, connections to consumers, etc? (**high, medium, low**)
- Travel agents \_\_\_\_\_,
  - Tour operators \_\_\_\_\_,
  - Industry associations \_\_\_\_\_,
  - Government promotion agencies \_\_\_\_\_,
  - Travel media \_\_\_\_\_,
  - Guidebooks \_\_\_\_\_.
12. What do you see as the primary obstacles to the overall marketing and acceptance of sustainability certification programs? How might these challenges be overcome?
13. Would you recommend any specific strategies for marketing sustainability certification programs in order to reach particular market segments or to increase penetration of the broader travel market?
14. Do you believe that current or proposed certification programs should to be modified in any ways in order to meet the special needs of small and medium sized enterprises?

## QUESTIONNAIRE #2

### For Use with Travel Industry Suppliers and Operators

We are asking for your participation in answering a few questions. The questions are part of a study being conducted by The International Ecotourism Society under a contract with the Inter-American Development Bank. The purpose of the study is to increase the competitiveness of Small- and Medium-size Enterprises (SMEs) in the tourism sector that are following sustainable tourism practices. The purpose of this questionnaire is to gather information on how best to market tourism certification so that it can be more effective in promoting sustainable practices by these SMEs.

Most travelers pick destinations and suppliers primarily on the basis of destination appeal, quality of services, health and safety, price, etc., but a subset of the market will also be influenced by sustainability issues. We are trying to determine how large this socially responsible travel segment is, who these travelers are, and what messages they are most likely to respond to. As part of that exercise we need to better understand the costs and benefits of certification programs to your portion of the industry and how they might be made more useful to you.

15. Do you currently participate in any certification programs that promote sustainable tourism? If so, which ones? Or do you use certified products in your business?
16. How significant have the benefits been to you in terms of: **(Please rank high, medium, or low)**
- Increased sales or pricing power \_\_\_\_\_,
  - Improved relations with shareholders, communities, workers, etc. \_\_\_\_\_,
  - Improved internal operations and efficiencies \_\_\_\_\_,
  - Other \_\_\_\_\_.
17. How significant have the costs of participating been in terms of: **(high, medium, low)**
- Direct payments to certifying agencies and auditors \_\_\_\_\_,
  - Management and staff time to collect data and answer questions \_\_\_\_\_,
  - Investment and operating costs to meet certification criteria \_\_\_\_\_,
  - Other \_\_\_\_\_.
18. Do you intend to keep participating in the current certification programs? Why or why not?
19. Are you considering joining other certification programs? Which ones and why?
20. Have you considered, but decided not to participate in any particular certification programs in the past? Which ones and why?

21. Are certain segments of your clientele more interested than others in sustainability issues and certification programs? Which ones?
22. How important do the various types of sustainability issues seem to be to your clientele? (**high, medium, low**)
- Using green technologies \_\_\_\_\_,
  - Protecting the natural environment \_\_\_\_\_,
  - Preserving local history and culture \_\_\_\_\_,
  - Generating local economic benefits \_\_\_\_\_,
  - Other? \_\_\_\_\_.
23. Which segments of the distribution chain are likely to be most interested and effective in promoting certification programs to consumers? (**For example: lodges, tour operators, travel agents, travel media, guidebook operators, government and industry promotion agencies**)
24. What are the primary reasons for the lack of consumer interest in sustainability certification programs? What marketing strategies could be used to increase consumer interest in these programs?
25. What are the primary reasons for the lack of industry participation in sustainability certification programs? What marketing strategies could be used to increase industry participation in these programs?
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**QUESTIONNAIRE # 3  
FOR TRAVEL GUIDEBOOKS FOR COSTA RICA, BELIZE, GUATEMALA,  
ECUADOR AND BRAZIL**

**Lonely Planet  
Moon Publications  
The Rough Guide  
The New Key to  
Ecotravellers Wildlife Guide**

We are asking for your participation in answering a few questions. The questions are part of a study being conducted by The International Ecotourism Society under a contract

with the Inter-American Development Bank. The purpose of the study is to increase the competitiveness of Small- and Medium-size Enterprises (SMEs) in the tourism sector of 5 Latin American countries (Costa Rica, Guatemala, Belize, Brazil and Ecuador) that are following sustainable tourism practices. The purpose of this questionnaire is to gather information on **how best to market tourism certification** so that it can be more effective in promoting sustainable practices by these SMEs.

As nature/adventure travel has become the fastest growing segment of the tourism industry, the media is devoting increasing attention to responsible tourism. We are trying to determine how large this socially responsible travel segment is, who these travelers are, and what messages they are most likely to respond to. As part of that exercise we need to better understand how US and Canadian tourists make their travel choices and how your publication educates its readers about environmentally and socially responsible travel options, and services those environmentally and socially aware travelers.

- 1) Please describe the profiles of your customers/readers (individuals and organizations). Include what you know about their travel interests; their level of awareness about and interest in sustainable travel; demographics; how they travel – independently, on organized tours with large groups, on organized tours with small groups; on tours organized by educational and non-profit organizations, etc.
- 2) How do you describe and market your guidebooks, website and/or other travel information resources to individual travelers?
- 3) Do you market your guidebooks to organizations (e.g. educational institutions and non-profit environmental and cultural heritage organizations) who offer tours? How do you present your company and its products to them?
- 4) How do you present your guidebooks and other informational resources to inbound operators?
- 5) Do you have an environmental/social responsibility policy? Is it available to travelers and tour organizers? How/where?
- 6) How would you characterize your **current coverage of ecotourism/sustainable tourism** compared to other travel guidebooks?
- 7) **What determines your coverage of ecotourism and/or sustainable tourism in your guidebooks and/or website?** Please rank in order of importance
  - Guidebooks' coverage of ecotourism – [what do you mean by this?]
  - Solicited consumer feedback

- Unsolicited consumer feedback [ what do you mean by this? I'd like to see if personal convictions/commitments of editors or writers is a reason, but it would be better to let them come up with this, rather than suggesting it. Maybe you could just make this one an "other" reason
  - Travel industry trends
  - Leverage of local and international environmental groups.
- 8) **Do you seek feedback on your guidebooks' coverage of ecotourism?** If so, who do ask? (outbound and inbound tour operators, wholesalers, tourists, others—please specify) If not, do you still receive feedback on your guidebooks and from whom?
- 9) Are you part of any **partnerships** in the travel industry to promote responsible tourism and ecotourism? Please describe.
- 10) What kind of a role do you think you can play in raising **consumer awareness** about and demand for certified tourism products?
- 11) What kinds of obstacles do you face in promoting responsible tourism to your customers/readers?
- 12) How much value-added do you feel your guidebooks would gain by including information on a) tour-operators and hotels/lodges that have been certified according to national or international ecotourism standards; b) certification programs?
- 13) Have you considered developing a thematic guidebook for those travelers concerned with ecotourism and cultural tourism?

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**QUESTIONNAIRE #4**  
**FOR US AND CANADIAN TOUR OPERATORS BOUND FOR COSTA RICA,**  
**BELIZE, GUATEMALA, ECUADOR AND BRAZIL**

We are asking for your participation in answering a few questions. The questions are part of a study being conducted by The International Ecotourism Society under a contract with the Inter-American Development Bank. The purpose of the study is to increase the competitiveness of Small- and Medium-size Enterprises (SMEs) in the tourism sector that are following sustainable tourism practices. The purpose of this questionnaire is to gather information on how best to market tourism certification so that it can be more effective in promoting sustainable practices by these SMEs.

Most travelers pick destinations and suppliers primarily on the basis of destination appeal, quality of services, health and safety, price, etc., but a subset of the market will also be influenced by sustainability issues. We are trying to determine how large this socially responsible travel segment is, who these travelers are, and what messages they are most likely to respond to. As part of that exercise we need to better understand how US and Canadian tourists make their travel choices and how your company appears to and services those environmentally and socially aware travelers.

- 1) How do you describe and market your company to individual travelers?
- 2) Do you market your company to organizations (e.g. educational institutions and non-profit environmental and cultural heritage organizations) who offer tours? How do you present your company to them?
- 3) Please describe the profiles of your customers (individuals and organizations)
- 4) How do you present your company to inbound operators?
- 5) Do you have an environmental/social responsibility policy? Is it available to travelers? How/where?
- 6) What types of clients are you seeking? Are certain segments of your clientele more interested than others in sustainability issues and certification programs? Which ones?
- 7) What information do you provide potential and actual clients regarding the environmental and/or social practices of your company? (please describe pre-trip information provided, information sharing during activities, information on environmentally/socially aware practices presented on site). Please also describe how this information is shared with clients (percentage of procurement from local/organic sources, etc)
- 8) How do tourists come to you? (Please rank in order of importance)
  - word of mouth
  - repeat visitors
  - your website
  - guidebooks,
  - company promotional literature,
  - award programs
  - TV programs
  - Newspaper and magazine articles
  - Other (please specify)
- 5) What are your clients' most important criteria for selecting your company ?
  - Destinations and activities covered by your tours
  - Cost
  - Your image as an ecotourism or adventure, nature tour operator,
  - Reputation for quality and safety
  - Your overall concern for environmental and socially responsible travel
  - Other (please specify)

9) Which of the following activities are most popular with your travelers to Costa Rica, Guatemala, Belize, Ecuador and/or Brazil? Please rank in order of importance

- Beach
- Nature observation and interpretation
- Birdwatching (why separate this out and not a subset of nature?)
- Adventure Sports activities (hiking, rafting, snorkeling, etc)
- Cultural visits and sightseeing
- Shopping
- Combination...
- Other (please specify)

6) What % of your clients/tourists do you send to Latin America?

How many tourists do you send annually to the following destinations?

- Costa Rica
- Guatemala
- Belize
- Ecuador
- Brazil

7) What are the other leading US/Canadian outbound tour operators to the aforementioned destinations in terms of volume?? Is this relevant? Would they know?

8) Is any part of your company or any other tourism business you use certified under one of the sustainable or ecotourism certification programs? Please describe.

9) What do you believe a responsible tourist is most concerned with in when evaluating the sustainability of a destination or tour operator?

- green technologies,
- contributions to nature conservation,
- returns to the local community,
- socio cultural see comments on other questionnaire! preservation,
- small business promotion (no idea what you mean here !!!)

10) What are the most important criteria you follow for selecting your inbound tour operator partners, lodges/hotels, transportation, guides?

11) How do you check on them?

- Dedicated staff
- Site visits
- Visitor or industry feedback
- Tourism certification (please describe)

- 12) Do you check to see if the lodges, inbound operators and other tourism service providers you are using are certified? Do you check their star rating? How much importance do you attach to each?
- 13) What do you think of the usefulness of independent 3<sup>rd</sup> party certification programs in the promotion of sustainable tourism and ecotourism? How could they be made more useful to you?
- 14) Does your company feature or promote any particular certification programs that deal directly with the sustainability aspects of tourism? Which ones and why? How effective do you believe you have been in terms of raising consumer demand for sustainable travel? How effective have the certification programs been in raising demand for sustainable travel? The order of this question should be considered with the preceding questions.....
- 15) What do you see as the primary obstacles to the overall marketing and acceptance of sustainable tourism certification programs? How might these challenges be overcome?
- 16) Can you recommend any specific steps to make certification programs more useful to your business? To your clientele?
- 17) What are some of the most popular guidebooks among your travelers? To what extent do you think they can play a key role in increasing demand for sustainable tourism and certification? How would you evaluate their coverage of responsible tourism practices...../ecotourism?
- 18) What are some of the most popular websites among your travelers? To what extent do you think they can play a key role in increasing demand for sustainable tourism and certification? How would you evaluate their coverage of ecotourism?

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**Questionnaire #5  
for Tourism Certification Programs  
Regarding Marketing Strategies**

This questionnaire is being administered on behalf of the Center on Ecotourism and Sustainable Development and The International Ecotourism Society as part of a study for the Inter-American Development Bank. The aim is to increase the competitiveness of

Small- and Medium-size Enterprises (SMEs) in the tourism sector of 5 Latin American countries (Costa Rica, Guatemala, Belize, Brazil and Ecuador) that are following sustainable tourism practices.

The purpose of this questionnaire is to gather information on how tourism certification and quality rating schemes market themselves, both within the industry and to consumers, and what marketing strategies have been most (and least) effective. The information will be used to develop a strategy for marketing sustainable tourism and ecotourism certification to benefit tourism SME's in these countries.

We welcome your analytic perspectives based on experience, and your recommendations for advancing sustainable tourism and ecotourism businesses through certification. Thank you for your assistance.

## Consumer Demand and Marketing

1. What are the ways you market your certification/quality ratings program to consumers (including individuals (ie tourists?), tour operators, travel agencies, etc)?  
If you are a member organization:
  - a. What are the ways you market your certification/quality ratings program to your members?
  - b. What are the ways you market your certification/quality ratings program to reach beyond your membership?
2. Who do you market your program to? Check those that apply:
  - independent travelers
  - commercial tour operators
  - non-profit organizational tour groups
  - leisure travelers
  - business travelers
  - mass tourism market
  - sustainable or special interest tourism market
  - business to business
  - protected area managers
  - government
3. What countries do you market your program to?
4. Describe the profile of your program's users.
5. What do you see as the consumers?
6. What are consumers looking for in a certification/quality-ratings program?

7. To what degree do you believe the traveling public is interested in issues of environmental and social responsibility?

## **Industry Demand and Marketing**

8. What types of enterprises or activities do you certify? Please specify type of business or activity, approximate size and types of travelers they serve.
9. What are the ways you market to tourism businesses in order to encourage participation in your certification/quality ratings program?
10. What incentives/ tangible benefits do you provide or facilitate for businesses to participate in your certification/quality ratings program?
11. What other factors encourage business participation?
12. What qualities are tourism businesses looking for in a certification/ratings system when deciding on whether or not to participate?
13. What challenges do tourism businesses face in becoming certified/rated? How have you – how might you helped them overcome these challenges?

## **Other**

14. What types of alliances or partnerships have you formed with other organizations to promote and market your certification/quality ratings system?
    - a. What benefits have these alliances had?
    - b. What challenges have they presented?
  15. Describe the media and promotional resources you use (e.g. brochures and other printed materials, advertising, Internet, guidebooks/directories, trade shows, conferences, media attention, videos, etc.) you use to market your program. Which have been most useful? Why? Which have been least useful? Why?
  16. What messages are most effective in developing support for and use of your certification/rating scheme?
  17. How has marketing of you program been funded?
  18. What have been some obstacles for increasing use of your certification program?
  19. Do you have any other recommendations or comments relevant to our work in developing an effective marketing strategy for ecotourism and sustainable tourism certification?
-

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Interviews with National Tourism Boards:

Costa Rica: Luis Madrigal (ICT, Statistics Unit)

Guatemala: Juan Solórzano (Tourism Attaché, Embassy of Guatemala to the US)

Belize: Raymond (Statistics Unit)

Ecuador: Rita Betancourt (Statistics Unit)

Brazil: Fabio Grossa (Chief of Division, Product & Segmentation Division) and Miguel Jeronimo (Brazilian Tourism Office in New York)

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