

# CONDUCT FIELD TESTS OF MARKETING "LESSONS LEARNED"

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The International Ecotourism Society



For:



## **Activity 3.1.4.4: 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"*

**Conduct field tests of marketing "lessons learned" from above activities in 5 target countries. Based on feedback from field testing, revise marketing plan for how to sell certified products to tour operators.**

The methodology approved for this product in the terms of reference for TIES with Rainforest Alliance was: "Utilize interviews and focus groups and seminars at workshops already scheduled in 5 target countries<sup>1</sup>." The conclusions and proposed strategy for marketing certified businesses and certification programs were presented and amply discussed in the following seminars and workshops:

- USA: Marketing Forum on Sustainable Tourism, New York, NY, June 29, 2005 (Annex 1)
- Guatemala: Third meeting of the Sustainable Tourism Certification Network of the Americas, Flores, Petén, September 5-8, 2005 (Annex 2)
- Brazil: UNEP Consultative Meeting on Sustainable Tourism Certification, Rio de Janeiro, October 26–27, 2005 (Annex 3).

Participation included the travel press, travel wholesalers from the United States, Europe, and Costa Rica, nearly all member organizations of the Sustainable Tourism Certification Network of the Americas, and all certification programs in the target countries, as well as from other parts of the world. In addition, numerous conservation and community organization, as well as multilateral agencies, participated. The complete lists of participants can be found in Annexes 1, 2, and 3.

The principal conclusions from the TIES studies and proposed marketing strategy were:

- Consumer demand takes time to build: One of the principal conclusions is that successful certification programs have almost never been created because of existing consumer demand for certification. Instead, the demand develops over many years (typically 8-15, sometimes as long as 20 years), long after industry decision-makers and intermediaries have begun to use certification as part of their due-diligence and purchasing criteria.
- Certification programs must offer a clear, easily understood message. Criteria should be harmonized, to ensure mutual recognition and simplification of the proliferation of logos and names.
- Companies seeking certification are initially concerned with improving performance and image: The reason for certifying businesses and products is to ensure a high and measurable standard of compliance with established norms, whether they be for quality, environmental protection, or social responsibility. The true demand for the standards usually initiates from large purchasers, such as wholesalers, governments, or other intermediaries in the commercialization chain. Marketing of certified products to consumers is usually most successful when done by the final intermediary, who retails products directly to the consumer.
- Health, safety, and quality are paramount consumer concerns: Much market research has shown that tourists seek to ensure the safety of their vacation (from wars, diseases, crime, or natural disasters ), in a destination that offers the attractions that they are interested in,

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<sup>1</sup> Costa Rica, Ecuador, Guatemala, Belize, and Brazil

at a price that is in accordance with the quality of service. These primary needs can limit the efficacy of marketing certification directly to consumers, if the focus is exclusively environmental.

- Marketing certification should focus initially on retail and wholesale intermediaries:
- Certification improves business performance and can save money: Marketing of tourism certification to businesses therefore seems to be the first priority, if a program is to be successful. To do this, it is important to emphasize to potential clients what the real benefits of certification are. It is now clear that, unless a program is long-established and has excellent brand recognition, simply adding a certification logo to a business's advertising is not going to increase occupancy. Credible certification is likely, however, to improve the quality of service of a business, because otherwise it will be unable to meet the certification criteria. Certification often requires substantial restructuring of poorly-run businesses.
- Tangible incentives help build industry buy-in to certification: An analysis of existing certification programs reveals that there are a growing number of concrete incentives, many offered by governments, that are helping to increase business interest in becoming certified.
- Voluntary certification is not likely to violate trade agreements. Voluntary certification, with no government incentives or regulation, is generally totally exempt from these agreements. Where there is government intervention at any level, programs must be shown to be equally applicable to all eligible businesses or products, irrespective of nationality.

Ensuing discussion at all three meetings validated these conclusions. No recommendations for altering the proposal were made, and supporting data were abundant. See particularly Annex 3, for detailed indications of these supporting data.

Particular emphasis was given by the participants at all three forums to:

- The need for a clear, simple message from certification programs and logos,
- Cooperative promotion among certified businesses, their wholesalers, guidebooks, and the programs themselves,
- The importance of tour operators as key intermediaries to promote certification among their suppliers and to their clients,
- Emphasis on the high quality, safety, and comfort of certified businesses, without paying a higher price than at similar uncertified, unsustainable businesses,
- The need for incentives to make certification attractive to businesses.

All of these recommendations are key aspects that are emphasized in the marketing strategy document, "*Marketing Strategy for Sustainable Tourism Certification: Activity 3.1.4.5*", The International Ecotourism Society, February 2005, Martha Honey, Abi Rome, Ed Sanders, Sintana Vergara, and Amos Bien.

## **Anexo 1: Marketing Forum on Sustainable Tourism, New York, NY, USA, June 29<sup>th</sup>, 2005<sup>2</sup>**

**Organized by:**  
**Rainforest Alliance, Sustainable Tourism Division**

**Facilitator:**  
Mary McBride, Consultant, Strategies for Planned Change.

**Attending:**  
The Marketing Forum for Sustainable Tourism will gather 30 to 40 representatives of international inbound and outbound tour operators, sustainable tourism certification programs, tourism related organizations, project funding entities and non governmental organizations.

**Objective:**  
Identify strategies to have a positive and broader impact in the marketing of sustainable tourism businesses, and share our experiences developing, marketing and selling environmentally and socially sound tourism services. We will directly contribute to the design of concrete actions and the strengthening of alliances to help responsible businesses do better in the marketplace. We will be able to connect with like-minded colleagues and marketing specialists while having a good time!

**Martha Honey, The International Ecotourism Society (TIES)  
Presentation,**

### **Challenges:**

- Certification is not a panacea but an extremely important tool.
- Need to harmonize existing programs around common process and framework criteria.
- Need to avoid green washing.
- Poor marketing of current certification programs.
- Too many logos and brands.
- Too little consumer demand.
- Little evidence that certification increases occupancy or sales.
- Government incentives (marketing, taxes, and training) for certified business may be regulated.
- All businesses need be treated the same way.
- Governments are now debating between which type of tourism businesses they want to support (experiential tourism or cruise tourism), can these coexist?.
- There is a gap between what tourism say they believe and what they actually do.
- Health and safety issues are a priority, then accessibility and quality and lastly environmental and social concerns. Certification programs should be able to address all these concerns.
- Need a clear message through the logos and good branding recognition.

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<sup>2</sup> Selections from Rainforest Alliance's meeting summary, entitled "RESULTS FROM THE MARKETING FORUM" and from meeting agenda.

- Consumer confusion with multiplicity of seals and logos.
- Possibility of an accreditation logo could strengthen marketing and recognition among the myriad of existing logos.
- Need to create critical mass.
- Consumer will not learn about certification if there are not enough certified products.
- Tour operators cannot give preference in their catalogues if there are not enough quality certified products.
- All certification programs are voluntary.
- The work with tour operators represents 2-3% of the US market. Need to work more closely with travel agencies.
- Marketing certification takes time and economies of scale.
- Most well known programs require many years to achieve international label recognition.

### **Opportunities:**

- There are organizations already committed to fostering sustainable tourism like the work TIES is doing, the largest ecotourism society with members in 90 countries. Partnership with CESD.
- A great body of background information and research in sustainable tourism is available.
- Certification can help improve quality and performance.
- Certification can help recognize important doing the right thing.
- Certification can help cut cost.
- Voluntary certification is generally accepted under international trade agreements, but making sure equal access is given to local and foreign businesses.
- Growth of "experiential tourism".
- More and more tourists want to learn more about customs, geography, culture, etc; however, these tourists are passive in terms of demanding sustainability from the hotels.
- Possibility of an accreditation logo could strengthen marketing and recognition among the myriad of existing logos.
- There are already cases of increase businesses through certification.
- Certification helps improve costs, improves quality, and increases staff motivation.
- Host of incentives for certified businesses from Governments: - provide access to different kinds of businesses, tax exemptions, procurement favoring certified.
- State employees encouraged to use certified products.
- Preferential treatment by parks and protected areas to operated for longer period of time of access to certain sites if the businesses are certified.
- NGOs producing guides and actively marketing.
- To build critical mass the intermediaries are keen. Target intermediaries rather than consumers.
- Travel agencies do not have the capacity to do due diligence.
- Educational travel programs and affinity groups (non profits in travel).
- Work online travel providers increasing and use of internet in general.
- Opportunity to work with guide books, travel media and internet.
- Certification could become an important tool for tour operators in the due diligence process.
- Insurance companies are now requesting more environmental and social criteria.

- More and more tour operators and associations are moving towards sustainability requirements (ANVR, Forum Anders Reisen, TUI, IGTOA, others).
- Need to incorporate marketing in the design and implementation of certification programs.

## **RESULTS FROM THE MARKETING FORUM**

Based on the discussions held during the Marketing Forum, the outcomes of the breakout sessions and the feedback received during the plenary sessions, the following list of recommendations was compiled:

## **RECOMMENDATIONS FOR CERTIFICATION PROGRAMS**

- Consumers purchase based first on price, quality, & safety. Therefore, green certification labels must fulfill these needs, as well as ensuring environmental and social responsibility.
- Certification programs can market themselves by promoting the fact that certification can, over time, lead to greater sales through increased overall quality of service, hence recognition by customer referrals, media, guidebooks, and tour operators.
- Certification can best be marketed through the intermediary: tour operators, travel agents, online travel providers, etc.
- When certification programs are designed with input and participation from a diverse variety of stakeholders, their buy-in is more assured.
- Support the creation of an accreditation body to strengthen their marketing and get international recognition.

## **ADDITIONAL ACTIVITIES FOR THE MARKETING STRATEGY**

Below is the list of activities that the Rainforest Alliance will include in its marketing strategy, to better market the small, medium and community-based tourism operations that are implementing best management practices and those that get certified:

- Work directly with inbound and outbound tour operators in the following activities:
  - Educating their captive audience (their clients) by giving them information on sustainable tourism (for example, through a consumer brochure).
  - Talking to their suppliers to make sure they educate and inform their guests on what they are doing in sustainable tourism, and how it is making a difference on the natural and social surroundings. Suppliers can promote cultural and environmental interaction to their guests by finding local stories on how sustainable tourism has benefited the people of the places where the tourism operations are located.
  - Sending out to the traveler, once they have returned home, a communication that says “Your travel choice **made** a difference”. This communication can tell them more about sustainable tourism, point them to places where they can get additional information, and encourage them to consider sustainability in their next trip.
  - Including on their website short articles or comments about the efforts that the tourism operations are making in terms of implementing best management practices.

- Including travelers' stories of their visits to sustainable tourism operations on their websites.
- Contact guidebooks to evaluate the possibility of including their participation in international fam trips. The Rainforest Alliance will coordinate four fam trips in Belize, Costa Rica, Guatemala and Ecuador and together with its partners will seek inclusion of certified tourism operations and businesses committed to the implementation of best management practices.
- Contact airlines to explore possibilities to publish articles on sustainable tourism in their magazines and include a list of responsible tourism operations (with their contact information) located in key destinations where the airlines travel to.
- Put online the upcoming catalogue of certified tourism products of the Americas.

### WHAT DID WE LEARN FROM THE INVITED JOURNALISTS?

- Find an answer to the question of what should *sustainable travel* mean to the traveler. Translate the technical information into consumer-friendly words. Respond to the reader why should they choose a sustainably-run travel operation – what do they get from it?
- Show that sustainable destinations are fun and beautiful, can fit the taste of any lifestyle, and that the quality of the experience of sustainable tourism is higher, which is one of the key criteria for consumers' purchasing decisions.
- Communicate clearly that sustainability equals quality; but quality (in the sense of just comfort) does not necessarily equal sustainability.
- Communicate that the Rainforest Alliance and its partners work with small and medium-sized enterprises, which can be a key point of differentiation: tourism services that are closer to the life of the community and offer a higher quality experience.
- Communicate a basic definition of sustainable tourism and that sustainability principles can be apply in all kinds of tourism, including beach tourism and urban tourism when practiced responsibly.

### Participants list

Name	Company/Organization	Country
Abi Rome	The International Ecotourism Society	USA
Ana Patricia Lobo	Rainforest Alliance	Costa Rica
Ana Paula Tavares	Rainforest Alliance	USA
Andrea Holbrook	Holbrook Travel	USA
Ariane Janer	PCTS	Brazil
Chris Seek	Solimar	USA
Cristina Suhr	Rainforest Alliance	Costa Rica
Damaris Arrieta	Fundecooperación	Costa Rica
Dana Archer	Rainforest Alliance	USA
Diego Andrade	ASEC	Ecuador

Federico Solano	Rainforest Alliance	Costa Rica
George Soriano	Horizontes Nature Tours	Costa Rica
Gina Anderson	Programa for Belize	Belize
Harro Boeckhold	Milleubarometer	The Netherlands
Jen Giroux	Greenteam	USA
Jennifer Dohrmann	CAST	Puerto Rico
Joke Aerts	Rainforest Alliance	The Netherlands
José Valdivieso	Smart Voyager	Ecuador
Juan Carlos Zapata	FUNDESA	Guatemala
Juan Luna	Interamerican Development Bank	USA
Karin Hense	Forum Andres Reisen	Germany
Laurie McLaughlin	Holbrook Travel	USA
Leyla Solano	COOPRENA	Costa Rica
Liza Murphy	Rainforest Alliance	USA
Louise Twining-Ward	Tourism Resource Consultants Ltd	USA
Mark Gruin	The Ecotourism Consulting Group	USA
Martha Honey	The International Ecotourism Society	USA
Mary McBride	Strategies for Planned Change	USA
Neda Arabshahi	Rainforest Alliance	USA
Neil Rogers	The Ecotourism Consulting Group	Sweden
Peggy Newfield	Latin American Escapes	USA
Richard G. Edwards	Wildland Adventures	USA
Ronald Sanabria	Rainforest Alliance	Costa Rica
Sandra Jiménez	Rainforest Alliance	Costa Rica
Santiago Dunn	Ecoventura	Ecuador
Saul Blanco	Green Deal	Guatemala
Silvia Salazar	Vesa Tours	Costa Rica
Stacy Pierson	Rainforest Alliance	USA
Steve Kent	Rainforest Alliance	USA
Tatiana Ramos	Tourism Development International	USA
Tensie Whelan	Rainforest Alliance	USA
Velveth de Muñoz	Asoptur	Guatemala
Victor De Lange	CREM	The Netherlands
Wim van Heumen	CBI	The Netherlands
Elena Sansalone	Communications Advisory Committee	USA
Martin Tandler	Board Member of Rainforest Alliance	USA
Rene Ebersole	Audubon Magazine	USA
Jennifer Toth	Conde Nast Traveler	USA
Kevin Doyle	Conde Nast Traveler	USA
Mark Kirby	National Geographic Adventure	USA
James Ruggia	Travel Agent Magazine	USA

## **Anexo 2: Tercera Reunión de la Red de Certificación de Turismo Sostenible de las Américas, Flores, Petén, Guatemala, del 5 al 8 de septiembre del 2005.**

Participaron 16 representantes de las organizaciones miembros, provenientes de 10 países de las Américas, así como delegados de organizaciones de apoyo de la Red e invitados especiales.

### **Informe de la Sociedad Internacional de Ecoturismo TIES:**

#### ***¿Cómo “vender” la certificación de turismo sostenible a consumidores y la industria turística?***

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### **Resumen: Estrategia de mercadeo para la certificación del ecoturismo y el turismo sustentable**

por Amos Bien

Desde principios del año 2004, La Sociedad Internacional de Ecoturismo (TIES) empezó a estudiar dos de los aspectos más críticos para los programas "verdes" de certificación del turismo: ¿cuál es la verdadera demanda del mercado para la certificación del ecoturismo y del turismo sustentable? y ¿cuáles estrategias podrían aumentar esa demanda? El objetivo principal del estudio ha sido desarrollar una estrategia de mercado para micro, pequeñas y medianas empresas, como parte de un proyecto financiado por el Fondo Multilateral de Inversión (FOMIN) del Banco Interamericano de Desarrollo (BID) y ejecutado por Alianza para los Bosques (Rainforest Alliance). El proyecto está dirigido a mejorar la implementación de certificación en Guatemala, Belice, Costa Rica, Ecuador y Brasil y a asegurar que los programas realmente benefician a las pequeñas empresas. Sin embargo, muchas de las investigaciones y los hallazgos tienen relevancia y aplicabilidad global.

TIES se llevó a cabo esta investigación con ayuda del Centro de Ecoturismo y Desarrollo Sustentable (CESD) de la universidad de Stanford, y contó con la colaboración de los investigadores Zoe Chafe, Jennifer Coyle, Vernita Ediger, Martha Honey, Suki Hoagland, Laura McLendon, Abi Rome, Ed Sanders, Barton Thompson y Jorge de Vicente en los Estados Unidos; Alice Crabtree en Australia; Herbert Hamele en Alemania; Anna Spenceley en Sudáfrica; y Amos Bien, Ana Baez, y Sintana Vergara en Costa Rica. Asimismo, hubo apoyo de las fundaciones Ford, MacArthur, Compton y Packard.

Investigación primaria ha involucrado grupos de enfoque e entrevistas en las Américas, Europa, África, Asia y el Pacífico. La investigación secundaria se ha basado principalmente en la análisis de investigaciones publicadas, una meta-análisis de la demanda de consumidores y empresas para productos del turismo sustentable y certificación, una análisis de los límites impuestos por los acuerdos de comercio internacional y una análisis de la cadena de comercialización norteamericana para los países de interés. Se hizo énfasis particularmente a los éxitos y fracasos de los programas de certificación en otras industrias como agricultura orgánica, productos forestales y ahorro de energía en electrodomésticos. Conocidos programas de calidad de turismo, como AAA, Mobil y Michelin, ofrecieron lecciones importantes sobre mercadeo directo al consumidor. Por supuesto, programas existentes de turismo sustentable en Europa, Australia, Costa Rica, Sudáfrica y otros dieron la referencia central del estudio, especialmente los programas que han sido o muy exitosos o fracasos totales.

Algunos de los hallazgos más importantes son los siguientes:

1. ***La demanda de consumidores necesita tiempo y paciencia para ser construida:*** Una de las conclusiones principales es que los programas exitosos de certificación casi nunca se han creado debido a demanda ya existente del consumidor para la certificación. Al contrario, la demanda crece a lo largo de muchos años (típicamente de 8 a 15, algunas veces hasta 20 años), mucho después de que los decisores principales de industria y los intermediarios comerciales hayan empezado a utilizar la certificación como parte de sus criterios de selección de compra y de verificación de producto (“due diligence”). Esto contradice llanamente la posición de varios críticos vocales de la certificación de turismo sustentable, quienes insisten en que no se debe desarrollar la certificación ni promoverla porque actualmente hay poca demanda directa del consumidor. Caso tras caso en este estudio ha demostrado que la demanda del consumidor se desarrolla mucho después de que un programa de certificación esté bien establecido, tiene una base amplia y utiliza un estándar con reconocida credibilidad.

Frecuentemente los esfuerzos de programas de certificación para mercadear directamente al consumidor fallan, por lo menos durante la primera década de la existencia del programa, porque (a) inicialmente no existen suficientes productos certificados, (b) el costo de mercadeo directo al consumidor final es extremadamente alto, y la gran mayoría de los programas de certificación tienen muy bajos presupuestos para mantener el costo de certificación bajo y alcanzable, (c) al contrario de los minoristas, quienes mercadean diariamente a los consumidores, y para quienes, por ende, agregar certificación a sus paquetes promocionales representa poco costo adicional, los programas de certificación tendrían que pagar el costo total de cualquier campaña promocional y (d) los programas de certificación, al contrario de los minoristas, generalmente carecen de habilidad y experiencia para hacer mercadeo directo al consumo.

2. ***La promoción de la certificación debe enfocarse inicialmente sobre intermediarios minoristas y mayoristas:*** La verdadera demanda para los estándares generalmente se inicia desde compradores grandes, como mayoristas, gobiernos organizaciones internacionales y otros intermediarios en la cadena de comercialización. El mercadeo de productos certificados a consumidores generalmente es más exitoso cuando está hecho por el intermediario final, quien vende productos al detalle directamente al consumidor. Por ejemplo, almacenes detallistas, como Lenox, Carrier, Sears y Lowes, promueven electrodomésticos certificados por EnergyStar directamente al consumidor, bastante exitosamente, con apoyo técnico del programa de certificación. En forma similar, la adopción de una política de compra de madera certificada por cadenas detallistas como Home Depot e Ikea, así como papel certificado por Kinko’s, aumentó tremendamente la demanda para productos certificados y estimuló a los productores a obtener la certificación. The Food Alliance (TFA) han descubierto que vender productos orgánicos a restaurantes y mayoristas han sido mucho más eficaz que tratar de mercadear directamente a los consumidores. El Marine Stewardship Council (MSC) crea un pequeño mercadeo al consumidor, pero prefiere concentrarse en mayoristas y detallistas como Legal Seafood y Whole Foods, quienes a su vez promueven el logotipo al consumidor.

En la industria turística, muchos operadores en Europa, así como algunos en Norteamérica, están implementando "políticas de sustentabilidad". Mientras los productos escogidos para incluir en sus catálogos dependen siempre de su propia inspección directa para asegurar calidad y sustentabilidad, un número cada vez mayor de operadores turísticos visualizan la

certificación como una forma de seleccionar a las empresas que procederían a inspeccionar para sus catálogos. Estos mayoristas podrían ejercer un efecto sobre destinos turísticos similar al efecto que ha tenido Home Depot en motivar la certificación de la madera.

3. ***Para el consumidor, los estándares de salud, seguridad y calidad deben incorporarse en los programas de certificación de sustentabilidad:*** Mucha investigación de mercado ha demostrado que los turistas quieren asegurar la seguridad de sus vacaciones (relativo a guerras, enfermedades, delitos o riesgos naturales), en un destino que ofrece los atractivos de interés, a un precio de acuerdo con la calidad de servicio. Nuestra investigación sugiere que la responsabilidad social y ambiental es importante para el consumidor, pero sólo después de que su exigencia de seguridad, calidad y precio haya sido satisfecha. En otras palabras, si se ofrece a un consumidor escoger entre una empresa certificada y una empresa no certificada, bien podría preferir la empresa certificada, si los factores principales son iguales. La experiencia de la certificación de café y comida orgánica que sólo ganarán gran popularidad después de que incorporaran requisitos de calidad, además de los criterios ambientales y sociales. Concluimos que enfatizar calidad, precio y valor debe ser parte de cualquier campaña para promover empresas certificadas por sustentabilidad.
4. ***Para las empresas, la certificación mejora el desempeño empresarial y puede ahorrar dinero:*** Ya está claro que, a menos que un programa tenga años de establecido y goce de excelente reconocimiento de marca, simplemente el agregar un logotipo de certificación a la promoción de una empresa no aumentaría la ocupación. Sin embargo, hay dos beneficios importantes para las empresas, aún con un programa nuevo de certificación: (1) mejores estándares a través del cumplimiento con más normas de mejores prácticas, sean éstos de calidad, protección ambiental o responsabilidad social, y (2) ahorros en los costos de insumos. Varios estudios han demostrado que los ahorros en agua y energía compensan el costo de implementación de la certificación en hoteles de tamaño mediano a grande.

Además, la certificación muchas veces requiere una reestructuración importante de empresas con problemas administrativos. Por lo tanto, muchas veces mejora la calidad de servicio de una empresa, porque de lo contrario no podrá cumplir con los criterios de certificación. Reportes de varias empresas certificadas también indican un mejoramiento dramático en la motivación de personal, cuando ellos están involucrados en implementación de las políticas de sustentabilidad. Esto incide directamente el mejor servicio de atención a clientes. Este mejoramiento de todos aspectos de calidad – ambiental, sociocultural y económico – sube la reputación de una empresa y, por ende y con tiempo, su ocupación.

5. ***Los incentivos tangibles ayudan a convencer a la industria a certificarse:*** un análisis de los programas existentes de certificación revela que hay una cantidad cada vez mayor de incentivos concretos, ofrecidos por gobiernos locales o nacionales, administradores de áreas protegidas y los medios de comunicación, quienes han ayudado a interesar a las empresas a certificarse. Algunos ejemplos incluyen incentivos fiscales en Barbados, acceso preferencial a áreas protegidas en Australia y trato preferencial en los libros guías de turismo para playas en Europa. Los incentivos pueden ser categorizados así:
  - a. Afirmaciones para convencer a empresas que certificarse les traería beneficios concretos
  - b. Apoyo en mercadeo para ayudar a la empresa aumentar su posicionamiento en el mercado, encontrar nuevos clientes o mejorar su imagen

- c. Ayuda técnica o financiera para implementar medidas para cumplir con los criterios de certificación, para los costos de certificación o para reducir costos operativos
  - d. Preferencia para uso y acceso a recursos naturales (p.ej. áreas protegidas) o mercados que cuentan con políticas de compra sostenible
  - e. Factores externos a la industria que dan ventaja competitiva a empresas certificadas (p.ej. incentivos fiscales)
  - f. Reconocimiento público por responsabilidad ambiental y social.
6. ***La certificación voluntaria probablemente no viola los acuerdos de comercio internacional:*** Otra área de estudio ha sido la relación entre los acuerdos de comercio internacional y la certificación de turismo. Existe preocupación de que el gran número de acuerdos obligatorios de comercio, en efecto en proceso de negociación, podrían afectar la certificación voluntaria y los incentivos que se podrán ofrecer a las empresas certificadas. Se estudió las implicaciones de los acuerdos GATT, TBT, GATS, NAFTA y CAFTA.<sup>3</sup> El estudio indica que es poco probable que hayan problemas importantes, siempre y cuando los programas de certificación sean reconocidos internacionalmente y cumplan con los criterios internacionales generalmente aceptados. La certificación voluntaria, sin ningún incentivo gubernamental ni implementación por reglamento, generalmente se permite bajo estos acuerdos. Sin embargo, donde hay intervención gubernamental a cualquier nivel, los programas deben demostrarse aplicables sin discriminación a todos los productos o empresas elegibles, sin tomar en cuenta origen nacional. Por lo tanto, los aspectos donde los programas de certificación de turismo podrían tener dificultad es donde hay incentivos gubernamentales para el programa, y que se da preferencia para compras, contratación del personal o patrimonio local.

El estudio concluye “la liberalización futura del comercio en servicios tal vez sea el mayor riesgo para los programas de certificación de turismo sustentable. Actualmente los programas de GATS de la mayoría de los países no inciden en la legislación turística en forma de barrera a la certificación. Sin embargo, existe presión a favor de más liberalización. Cualquier programa de turismo sustentable debe de trabajar para asegurar que las acciones futuras reflejen las necesidades particulares de turismo sustentable.”

Hay muchas conclusiones adicionales a partir de este trabajo, muchas más que de las pueden ser resumidas en este artículo. Creemos que el estudio ha abierto brecha en el entendimiento de cómo mercadear la certificación de turismo sustentable. Pronto se llevarán a cabo pruebas de campo en los países meta en América Latina, para determinar la validez de las conclusiones y la estrategia propuesta. Una vez que se completen las pruebas, la documentación completa del estudio estará públicamente disponible en Internet en los sitios web de TIES y Alianza para los Bosques ([www.ecotourism.org](http://www.ecotourism.org) y [www.rainforest-alliance.org](http://www.rainforest-alliance.org)).

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<sup>3</sup> Por sus siglas en inglés: General Agreement on Trade and Tariffs, Technical Barriers to Trade, General Agreement on Trade in Services, North American Free Trade Agreement y Central American Free Trade Agreement.

## Resumen de conclusiones de la discusión por Rainforest Alliance<sup>4</sup>:

El informe presentó los principales retos en el mercadeo y la aceptación de la certificación en turismo sostenible, basados en las investigaciones que TIES ha realizado. Se analizó, también, como vender la certificación de turismo sostenible tanto a consumidores como a la industria turística.

Los principales puntos analizados fueron:

- Las limitaciones potenciales para la certificación de turismo sostenible bajo las reglas internacionales de comercio.
- La demanda del consumidor muestra una preferencia hacia productos sostenibles, sin embargo basan su compra en el destino, precio, calidad, acceso y seguridad. Los consumidores darían preferencia a empresas certificadas con igualdad de atractivos, precios, calidad y seguridad.
- La necesidad de tener claridad en el mensaje que se transmite a través de la certificación y la obtención de credibilidad internacional.
- La importancia de los incentivos para las empresas certificadas y del mercadeo a través de intermediarios.
- El papel de las tour operadoras en la promoción de las empresas certificadas.
- Lecciones aprendidas sobre mercadeo y certificación de PYMES.

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<sup>4</sup> Memoria correspondiente a la III reunión de la Red de Certificación de Turismo Sostenible de las Américas celebrada en Flores, Petén, Guatemala del 5 al 8 de Octubre de 2005, editado por Rainforest Alliance.

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# **Anexo 3: UNEP Consultative Meeting on Sustainable Tourism Certification, Rio de Janeiro, Brazil, 26th – 27th October, 2005**

**Document summarizing and accompanying presentation by Martha Honey, TIES**

## **MARKETING SUSTAINABLE TOURISM CERTIFICATIONS**

*Presentation by Martha Honey, Executive Director*

### **1. INTRODUCTION**

One of the central issues facing “green” tourism certification programs is the extent of industry and consumer market demand for sustainable tourism and ecotourism certification and what strategies will help to increase the demand. It has been variously claimed that certification will increase occupancy in certified businesses or that it has no effect on occupancy; that consumers claim when interviewed that they prefer certified businesses or that consumers lie to interviewers and do not consider certification or sustainability in making their purchase decisions.

The International Ecotourism Society (TIES) has been studying the market demand for sustainable tourism certification since 2004, in order to determine the answers to some of these questions and propose a marketing strategy for certified small and medium businesses. The study has examined successful and failed programs in tourism and a number of other industries and applied these lessons to sustainable tourism.

### **2. LATEST DEVELOPMENTS AND STUDIES**

A principal objective of these studies has been to develop a marketing strategy for small and medium certified businesses in Guatemala, Belize, Costa Rica, Ecuador, and Brazil. However, much of the research and the findings have global applicability. Primary research has involved focus groups and interviews in the Americas, Europe, Africa, Asia, and Oceania. Secondary research has principally been based on the analysis of published research and a metasurvey of consumer demand for sustainable tourism products and certification. Special emphasis was given to the successes and failures of certification programs in other industries, such as organic agriculture, forest products, and energy-saving appliances. Other important lessons were learned from well-known quality programs in tourism. Sustainable tourism certification programs, of course provided the central reference, especially those programs that have been most successful or miserable failures.

In parallel with these studies, other groups have identified additional key areas, such as purchasing processes used tourists in general<sup>5</sup>, and the gap between stated preferences and actual behavior<sup>6</sup>.

### **3. KEY ISSUES AND CHALLENGES**

Among the key challenges revealed by the study are:

- limited market recognition of most sustainable tourism certification programs (although there are now several marked exceptions) – this has been exacerbated by the proliferation of small programs without having a credible international standard, harmonization, and accreditation;
- the “green gap”, as it has been labeled by Megan Epler Wood, between stated consumer preferences in surveys and real world behavior;

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<sup>5</sup> Travel Industry Association of America, May 2005, “Leisure Travel Planning: How Consumers Make Travel Decisions”, [www.tia.org/Pubs/pubs.asp?PublicationID=109](http://www.tia.org/Pubs/pubs.asp?PublicationID=109)

<sup>6</sup> Megan Epler Wood, May 2004, “The Green Market Gap”, [www.eplerwood.com](http://www.eplerwood.com)

- lack of marketing expertise and an adequate budget for marketing by certification programs;
- incorrect or misleading promotion of certification to prospective clients;
- lack of knowledge of the lessons learned from successful and failed certification programs in other industries;
- careless design of governmental intervention or incentives could bring certification under the ambit of international trade agreements, such as GATS;
- inability of small and medium businesses to successfully capitalize on their product differentiation based on certification.

#### 4. RECOMMENDATIONS<sup>7</sup>

1. *Consumer demand takes time to build:* One of the principal conclusions is that successful certification programs have almost never been created because of existing consumer demand for certification. Instead, the demand develops over many years (typically 8-15, sometimes as long as 20 years), long after industry decision-makers and intermediaries have begun to use certification as part of their due-diligence and purchasing criteria. This contradicts the position of a number of vocal critics of sustainable tourism certification, who maintain that certification should not be developed or promoted because there is little existing consumer demand for it. Case after case has demonstrated that consumer demand develops long after a certification program is well-established, has a wide base, and uses a credible standard.

Certification programs' efforts to market directly to the consumer frequently fail, at least in the first decade of a program's existence, because (a) there are not enough certified products initially, (b) the cost of direct consumer marketing is extremely high, and most certification programs have a minimal budget, in order to keep the cost of certification low and accessible, (c) unlike retailers, who market to consumers on a daily basis, and therefore for whom adding certification into their promotional packages represents little additional cost, certification programs would have to pay the entire cost of a promotional program, and (d) again, unlike retailers, certification programs are generally unskilled in primary consumer marketing.

2. *Companies seeking certification are initially concerned with improving performance and image:* The reason for certifying businesses and products is to ensure a high and measurable standard of compliance with established norms, whether they be for quality, environmental protection, or social responsibility. The true demand for the standards usually initiates from large purchasers, such as wholesalers, governments, or other intermediaries in the commercialization chain. Marketing of certified products to consumers is usually most successful when done by the final intermediary, who retails products directly to the consumer. Lenox, Carrier, Sears, and Lowe's all co-market EnergyStar certified appliances directly to the consumer, with substantial success.

3. *Health, safety, and quality are paramount consumer concerns:* Much market research has shown that tourists seek to ensure the safety of their vacation (from wars, diseases, crime, or natural disasters), in a destination that offers the attractions that they are interested in, at a price that is in accordance with the quality of service. These primary needs can limit the efficacy of marketing certification directly to consumers, if the focus is exclusively environmental. In addition, at least one study has shown that some consumers believe that certified businesses are more expensive than non-certified ones, although there is little evidence that such a price differential exists. Other studies show that consumers say that they would pay more for environmental and social criteria, however in our study tourist wholesalers and retailers unanimously agree that their clients rarely, if ever, ask about the environmental policies of the tours they purchase, and seldom offer to pay more for environmental compliance alone. These same clients, according to tour operators, are nonetheless quite pleased when they are told that the places that they will visit are socially and environmentally responsible. Furthermore, it is often difficult for consumers

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<sup>7</sup> The International Ecotourism Society, 2005, "Marketing Strategy for Sustainable Tourism Certification", [www.ecotourism.org](http://www.ecotourism.org)

to know where to find socially and environmentally responsible companies, especially if they are not using a reputable tour operator with a sustainability policy.

Our study suggests that environmental and social responsibility are important to consumers, but only once their demand for safety, quality, and price have been satisfied. In other words, a consumer who is offered a choice between a certified and a non-certified business might well choose the certified business, if all other factors are the same. Unfortunately there are not as yet enough certified businesses in the Americas to test this hypothesis, although it seems to hold for certified businesses in parts of Europe and South Africa. This also tends to support a working hypothesis that environmental and social certification programs in any field, that do not first ensure quality of the product, can doom or delay the success of the certification label. This was clearly demonstrated in the early days of coffee and organic certification. We conclude that stressing quality, price, and value would seem to be an essential ingredient of any campaign that intends to promote certified businesses and that tour operators have done a poor job of informing their clients about responsible businesses.

4. *Marketing certification should focus initially on retail and wholesale intermediaries:* The adoption of a purchasing policy for certified timber by Home Depot and Ikea, as well as certified paper by Kinko's, greatly increased the demand for certified products and stimulated producers to obtain certification. The Food Alliance (TFA) finds that marketing organic food to restaurants and wholesalers has been more effective than trying to market directly to consumers. The Marine Stewardship Council (MSC) does little marketing to consumers, but rather to wholesalers and intermediaries, such as Legal Seafood, Whole Foods, and Unilever, who do promote the label. In tourism, many tour operators in Europe, as well as a few in North America, are implementing "sustainability policies". While their choice of products to include in their catalogues depends on their own direct inspection of properties to ensure quality and sustainability, an increasing number of tour operators see certification as a way of pre-selecting the businesses that they will proceed to review for their catalogues. These wholesalers could exert an influence on certifying tourist destinations similar to the effect that Home Depot has had on motivating timber certification.

5. *Certification improves business performance and can save money:* Marketing of tourism certification to businesses therefore seems to be the first priority, if a program is to be successful. To do this, it is important to emphasize to potential clients what the real benefits of certification are. It is now clear that, unless a program is long-established and has excellent brand recognition, simply adding a certification logo to a business's advertising is not going to increase occupancy. Credible certification is likely, however, to improve the quality of service of a business, because otherwise it will be unable to meet the certification criteria. Certification often requires substantial restructuring of poorly-run businesses. Several studies have demonstrated important cost savings in energy and water that more than compensate the cost of implementing certification in medium to large hotels. Reports from certified businesses also indicate dramatically improved staff morale and commitment, when they are involved in implementing a sustainability policy. This has direct repercussions in improved service and attention to clients. Improved quality in all aspects – environmental, sociocultural, and economic – greatly increases a business's reputation and hence its occupancy.

6. *Tangible incentives help build industry buy-in to certification:* An analysis of existing certification programs reveals that there are a growing number of concrete incentives, many offered by governments, that are helping to increase business interest in becoming certified. Some examples include tax write-offs in Barbados, preferential access to protected areas in Australia, preference in guidebooks for beaches in Europe, etc. Without careful consideration, however, some of these governmental incentives could place the certification programs under scrutiny by international trade agreements.

7. *Voluntary certification is not likely to violate trade agreements<sup>8</sup>:* A final area of the TIES study relates to trade restrictions and certification. There has been concern that the large number of binding trade agreements in force or likely to be ratified will affect voluntary certification and incentives that can be offered to certified businesses. Stanford law school university professor Barton Thompson undertook a

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<sup>8</sup> The International Ecotourism Society, 2005, "Trade Issues in Sustainable Tourism Certification: An examination of the constraints imposed by international trade rules and organizations' (NAFTA, WTO, etc.), barriers to trade", [www.ecotourism.org](http://www.ecotourism.org)

study for TIES on the implications of GATT, TBT, GATS, NAFTA, and CAFTA<sup>9</sup> for the voluntary certification of sustainable tourism. His findings suggest that there are unlikely to be serious problems, as long as certification programs are internationally recognized or comply with generally accepted international criteria. Voluntary certification, with no government incentives or regulation, is generally totally exempt from these agreements. Where there is government intervention at any level, programs must be shown to be equally applicable to all eligible businesses or products, irrespective of nationality. The areas where tourism certification programs might have difficulty then, are where there are government incentives for local purchasing, hiring, or ownership. Even in these cases, however, careful compliance with international practices, as well as tourism's treatment under GATS (and not GATT and TBT), could permit limited application of these practices. The study concludes, however, "Future liberalization of trade in services poses perhaps the greatest risk to sustainable tourism programs. Most nations' GATS schedules do not currently include restrictions on tourism laws that are likely to pose insurmountable barriers to sustainable tourism certification. Pressure continues, however, in favor of greater liberalization. Any international program for sustainable tourism should work to ensure that future actions reflect the particular needs raised by sustainable tourism." A recognized international accreditation system would provide the necessary shield for ensuring the continued acceptance of voluntary sustainable tourism certification, even when restrictive of certain trade practices (e.g. mandating local purchasing).

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## Summary of discussion and conclusions from the meeting:<sup>10</sup>

### Marketing and market access

Martha Honey from the Ecotourism Society presented the results of extensive research conducted by the International Ecotourism Society, the results of which are summarised below, and frame the discussion that took place amongst participants during this session.

- Consumer demand takes time to build: One of the principal conclusions is that successful certification programmes have almost never been created because of existing consumer demand for certification. Instead, the demand develops over many years (typically 8-15, sometimes as long as 20 years), long after industry decision-makers and intermediaries have begun to use certification as part of their due-diligence and purchasing criteria.
- Companies seeking certification are initially concerned with improving performance and image: The reason for certifying businesses and products is to ensure a high and measurable standard of compliance with established norms, whether they be for quality, environmental protection, or social responsibility.
- Health, safety, and quality are paramount consumer concerns: Much market research has shown that tourists seek to ensure the safety of their vacation (from wars, diseases, crime, or natural disasters), in a destination that offers the attractions that they are interested in, at a price that is in accordance with the quality of service.
- Marketing certification should focus initially on retail and wholesale intermediaries:
- Certification improves business performance and can save money: Marketing of tourism certification to businesses therefore seems to be the first priority, if a programme is to be successful.
- Tangible incentives help build industry buy-in to certification: An analysis of existing certification programmes reveals that there are a growing number of concrete incentives, many offered by governments, that are helping to increase business interest in becoming certification

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<sup>9</sup> General Agreement on Trade and Tariffs, Technical Barriers to Trade, General Agreement on Trade in Services, North American Free Trade Agreement, and Central American Free Trade Agreement

<sup>10</sup> Tourism Certification as a Sustainability Tool: Assessment and Prospects, Xavier Font, 2005 (draft)

- Voluntary certification is not likely to violate trade agreements. A final area of the TIES study relates to trade restrictions and certification.

During the workshop, participants were asked to write down both good marketing examples, that they could justify with evidence, as well as their perceptions on bottlenecks and challenges. These are the results, grouped by the moderator for ease of understanding.

### **Good marketing examples, backed with evidence**

**Government** (9 responses). Longer licenses in protected areas (3 times); In Brazil, the involvement of government and the standard and accreditation structures together with the other stakeholders; Priority access to govt marketing/promotion campaigns-destinations; In Costa Rica, tourism chambers forced governments to reactivate certification (hotels, tops, ecotourism); Government incentives- preferential marketing, tax deductions, increased access to protected areas; Work together with governments certification/ accreditation structures; Certification excellent if ISO leveraged;

**Tour operators** (8). Direct communication with tour operators to include certified products once the relationship between the standard and the tour operator interests has been clarified (i.e. CST-TUI); Central and co-ordinated communication to tour operators of all certification schemes; Marketing through “wholesalers” (operators)- more efficient; Inbound operators in Costa Rica requiring hotels to be certified by 2008; Marketing through inbound operators (ex Costa Rica, Guatemala, Ecuador); Access to brochures- Rainbow Tours, UK. Imagine Reisen Switzerland; Tour operator networks using certified products; Partnerships with private sector- increased awareness of the need for sustainable products

**Endorsements/ awards** (6). Trade associations, specialised associations (IGTOA Ecuador); Credibility and big NGOs endorsement; organisations recognised by the market and society, international awards.

**Co-operative marketing** (5) Joint marketing through networks; Directories/ websites of certified products; Cross marketing- sustainable wood (FSC)- watch the bird (tourism); Using media workshops and press trips to domestically promote certified businesses

**Clear message** (4). Blue Flag (2 times), Single and simple logo; one logo= one idea

**Travel guides/guidebooks** (3). Inclusion in travel guides e.g. good alternative travel guide, Guidebooks or catalogues with listings of certified products; Get information in travel guide books (SmartVoyager for example)

**Cost reduction** (3). Reduce energy and water costs pay for certification implementation; Reduced costs of environmental mitigation

**Not market demand** (2). Increasing demand for due diligence; Instrumental in reporting in CSR issues

**Market demand** (2). Marketing green products within others- giving choice to customer to choose the best of all- green ones (should be clear message- why they are best!); Increase social and labour responsibilities of consumers

**Others** (8) The Woolmark; JTB; Merge of quality within sustainability; Marketing green products together- green product chain; Applying standard improve performance; Marketing to businesses to be certified; Offering workshops in different countries; Increasing sales and percentage of occupancy

### **Bottlenecks/ problems/ challenges**

**Image/logo/accreditation** (9 responses). Proliferation/excess of logos and lack of one global uniform logo. Proliferation of initiatives and labels. Need for common framework/criteria and

accreditation of different certification programmes to provide credibility. Accreditation should use existing systems. Need of an international recognition for tourism certification – International Accreditation Forum.

**Consumer (7):** No recognition by consumers, right messages to different audiences, awareness by consumers, clear simple message to consumers, short attention spans of consumers and entrepreneurs, unprofessional marketing, not consumer orientated, too long and boring message, too little choice, lack of information to consumers

**Supply chain (5).** Tour operators are not recognising some of the programmes due to fragmented info and lack of mechanisms to ensure credibility, missing commitment to share responsibility along marketing chain, no ownership by the private sector, lack of focus on internal markets, lack of trust among supply chain actors.

**Harmonisation (lack of) (5).** Different needs for different countries/ regions prevents harmonisation. Different approaches/problems between North and South.

**Marketing (4).** Need to focus appropriate markets, lack of marketing knowledge and skills and lack of credible products, have led to generate higher consumer expectations than reality.

**Funds (4).** Lack of money not only in developing countries, limited resources for marketing and promotion, lack of resources to market certification programmes, certification schemes are not really interested in effective marketing as it does not provide them an income as a scheme- they want it to get funding.

**Evaluation/ data. (4).** Need to document better the impacts to support marketing and communication efforts- measure, document, and communicate. Need hard data demonstrating value of certification Not harmonised evaluation procedures.

**Economies of scale (4).** Many countries with no certification. Too few certified products. Barriers to entry from small/medium and especially micro businesses. Perceived high costs (i.e. certification not delivering value).

**Stakeholder support. (2).** International NGOs and key players are not publicly endorsing systems due to risk of bad exposure if the endorsement is given to a “greenwashing” programme. Co-operations with tourism organisations (ngos, tour operators, professional organisations) to unite marketing means and methods.

**Internal (2).** Lack of co-operation between certification programmes. Limited opportunity for network

**Transparency,** lack of (2)

**Other (3).** No tool for product development- it should be; Certifier need better understanding of strategic issues; Expectations

### **BUSINESS TO CONSUMER**

There is agreement in that certification programmes have not been good at marketing, and that targeting consumers directly is not cost effective, that certification programmes do not start with consumer demand (Amos Bien, Ronald Sanabria, Martha Honey), although it was suggested that working through the business market has not been explored, yet this was successful in climate compensation (Ruud Klep). Certification programmes have accepted their poor marketing performance, and partly attributed it to the fact that certification programmes have no in-house marketing or communications specialists (Font and Carey 2005 and also WTF workshop). Marketing can be expensive, but there are good examples of below the line marketing (Jennifer Seif, Sybille Riedmiller, Ariane Janer). Marketing smarter, rather than harder, should be the priority, finding simple messages that push the right consumer buttons and sell that quality needs to have sustainability built in.

Few labels have market recognition, with the Blue Flag being the best known and widely recognised as a model. The EU label has one logo used in every EU country regardless of the product group in question, claiming to thereby eliminate consumer confusion prevalent at the moment given the numerous self claims and green logos in existence. The final consumer, therefore, should be able to recognise that the Flower logo represents demanding ecological criteria which have been established according to scientific and technical guidelines with widespread participation from independent and neutral bodies (Athina Koutroumani/ Thierry Dudermel).

Martha Honey reported that consumer demand for responsible tourism is growing and strong, but largely passive, and while consumer surveys show strong willingness, few have measured actual practices (CESD and TIES 2004). Even if there is a latent or actual demand for sustainability, this does not mean there is demand for the concept of certification, or for the currently certified products. TIES' own research suggests that inadequate marketing and confusion about labels constrain consumer demand, industry improvements, and corporate benefits (CESD and TIES 2004).

Market recognition and market access are meant to be key additional benefits from certification programmes over and above other sustainability instruments. In the past certification programmes might have had too high expectations on the possible marketing benefits in the short term, but the discussions at WTF, and their literature show that they are been more cautious in their claims. A number of companies will join to show that they are the best (Asnate Ziemele) or to get access to markets (Alice Crabtree). However developmental benefits were stated as the most important (also Asnate Ziemele) and often marketing benefits not expected (Jennifer Seif), not the main reason for joining (Cathy Parsons), or not actively promoted as a reason to join (Ariane Janer). Companies didn't necessarily want to be certified to get more customers, but better customers, which was surprising to the Latvian programme (Asnate Ziemele). However these same developmental benefits could be achieved through other mechanisms that do not require the current expense of verification (Jose Augusto Pinto de Abreu), even when we take into account the comments from participants (for example Amos Bien when comparing with students) that the companies work harder for externally graded work, rather than if they were allowed to self-assess.

### **BUSINESS TO BUSINESS**

If the final consumer is unlikely to demand an ecolabel, these certification programmes need other economic incentives. Without such incentives, companies might leave after they have learnt (Ruud Klep, Diego Andrade), although schemes like Green Globe have a 97% renewal rate (Cathy Parsons). These can be price premium, longer term contracts, better marketing conditions or market access. These incentives can be provided by a range of communication and distribution channels, not just consumers.

Some of the most reported examples of good practice during the workshop were the result of co-operation with tour operators, travel guides and co-operative marketing, including but not exclusively through government support. Certification would seem to be well placed to take advantage of a growing interest this situation if it responds to the market needs in terms of what certification means to these communication and distribution channels. It was suggested that if tour operators are not interested in certified products, it is because the information is not presented in the right way (Ronald Sanabria). Ronald reported of 4 or 5 leading Costa Rican inbound operators that are giving preferential treatment to certified suppliers, and have stated that 75-80% of their suppliers will be certified, and still stop purchasing from companies that have not engaged in the process of certification.

Eugenio Yunis did however say that often we are exaggerating the benefits of certification, for example when saying that tour operators are requesting their supplies to be certified as this is not widespread practice, to promote certification. The most promising avenue to mainstream certification through the supply chain might come from the interest by the Federation of Tour Operators (UK based) and the Dutch tour operator association ANVR to set voluntary standards for their accommodation

suppliers (see Tourlink project, with participation from Naut Kusters, Xavier Font and Herbert Hamel). However this does not automatically mean that certification programmes can fill that space, as confirmed by some participants at WTF (i.e. Jennifer Seif) as these communication and distribution channels might want to develop their own standards and apply them through their supply chain in a more cost-effective way, rather than wrestle with understanding many standards and finding out that for the majority of their suppliers, there are no standards available (Ruud Klep).

#### **REPOSITIONING SUSTAINABILITY CERTIFICATION AS ADDED QUALITY**

To sell fair trade coffee, we had to assure this was good coffee (Sasha Courville). Repositioning certification to be quality +. VISIT already understood this conceptually although they could not ensure this was the case, and fundamental quality elements were not considered in their assessment. Both the World Bank report and the presentation from Bob Toth during the WTF acknowledge this issue, and tour operators under the Tourlink project have acknowledged the importance of ensuring basic quality aspects as a starting point. This has the advantage of integrating different aspects in one inspection, as done in fair trade and organic food (Sasha Courville, Bob Toth). However repositioning certification programmes to include a broader range of quality, and possibly some basic health and safety issues will be a challenge. Repositioning could be the result of creative marketing communications, or result from actually changing the product. In the first case, we simply change the message to say that sustainability means more than quality, and imply that all sustainable products have a certain quality element. This is of course dangerous, but the option of measuring quality might not be credible as there are more established players that can do so. Certification needs to mean quality, at least a guarantee of meeting labour and human rights and security (Helenio Waddington). Certification can help legitimise firms as being sustainable, in those countries where compliance with legislation can be bought (Sybille Riedmiller). In Brazil, there is the perception that certified products are for the international market, and that for the domestic market the tourism businesses do not even comply with existing labour laws (Mario Mantovani). For some labels like SmartVoyager and Green Deal sustainability and quality are integrated from the outset, and they target such a niche market that guarantees they can make a difference (Bob Toth).

All of the above lead to the need for a simple, well communicated message. This was reported as the main challenge in the feedback from WTF members. To many present at WTF this means having only one logo. The message was not discussed, other than the example of Blue Flag being successful (Heiko Crost, Asnate Ziemele). The sustainability message is however complex (Guyonne James, Asnate Ziemele). An environmentally committed hotel may still be perceived as providing an experience with less comfort or quality (“roughing it”), and such perception needs to be changed (Monica Borobia). Confusion on the message is a turn-off (Sasha Courville).

#### **THE IMPACT OF ECOLABELS IN TRADE, AND IMPLICATIONS FOR GATS**

Carrying capacity limits, demands for local employment, purchase of locally produced goods and compatibility of services with the local culture are all more likely to be challenged than environmental standards. This is because social standards could be seen as protectionist barriers to trade limiting market access, whereas environmental standards apply equally to national and foreign firms. It is only when these standards can have an impact on trade (providing much increased benefits to certified firms than non-certified ones, particularly if certification becomes a requirement to trade) that the certification programmes can be challenged. The latter was in fact the purpose of the study that Font and Bendell were commissioned initially where the advice was not to develop an international standard to be included in multi-lateral trade negotiations (Font and Bendell 2002). However the current certification programmes do not have sufficient impact on the market to be meaningful trade barriers. It is only if distribution channels demand these standards, and the standards become de facto requirements to trade, that concerns arise. The two reasons why they can be challenged are when they focus on social standards, and when

certification has high levels of support from governments. Standards can be challenged as trade barriers when they do not provide a level playing platform, i.e. when the standards themselves might disadvantage some firms (particularly international firms over local firms) by setting requirements of certain levels of local employment and limits to repatriation of earnings.

For example, if meeting the standards from Ecotourism Australia can provide better access to licenses, the standard could be challenged if it could be proven that foreign firms would be disadvantaged in meeting the standard over domestic firms. This is however unlikely and there are no precedents of more established ecolabels being challenged by the World Trade Organization on which to base the analysis. Pre-empting possible challenges, ISEAL is working towards promoting standard setting that is not seen as a barrier to trade, through open transparent and participatory methods. This is therefore not a short term priority issue, but one to be taken into account if sustainable tourism certification has more market traction.

## Participants list

Name/ Position	Organization	Country
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Cristina Montenegro Coordinator	UNEP Office Brazil	Brazil
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