

PROMOTIONAL VEHICLES FOR CERTIFIED BUSINESSES

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ABSTRACT

Guidebooks, travel magazine and supplements, outbound tour operators, educational and travel study programs, government promotion, trade shows, and websites are all vehicles for promoting use of certified businesses. For marketers to decide which route to give priority to, they must first assess the demand for and supply of ecotourism and sustainable tourism. In order for any of these promotion vehicles to be successful in promoting certified businesses, certification must be backed up by a legitimate, responsible and reliable brand and have a clear and transparent definition of what it stands for.

TABLE OF CONTENTS

ABSTRACT.....	2
TABLE OF CONTENTS.....	2
INTRODUCTION	3
METHODOLOGY	3
RESULTS AND DISCUSSION.....	3
CONCLUSIONS AND RECOMMENDATIONS	10
BIBLIOGRAPHY.....	12
CONTACTS LIST	13

INTRODUCTION

The purpose of this report is to **determine the most effective promotion vehicles for certified businesses in the tourism industry**. All of the research, surveys 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, directed to travel guidebooks, outbound ecotourism operators, educational and study travel programs, trade shows, and responsible tourism and travel websites; ii) and phone interviews with tourism boards of the 5 target countries and other marketing specialists.

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

□ TRAVEL GUIDEBOOKS

Literature research

- National statistics of the best selling travel guidebooks in the U.S. are difficult to obtain, as the US book market is actually divided into three: national chains, independent bookstores, and the academic market. Based on TIES interviews with book wholesalers and bookstores¹, the best selling travel guidebooks among ecotourists are, in this order: Lonely Planet, Moon, and the Rough Guide.
- The guidebooks examined for this study were: Lonely Planet, The Rough Guide, Moon, Footprint, Insight Guide, Fodor's, Frommer's, and The New Key to Costa Rica.
- Travel guidebooks increasingly have a sub-section dealing with "Responsible Tourism" where they provide travelers with ecotourism code of conduct, names of local and international non-profits promoting ecotourism, and contact information for outbound and inbound nature-based tour operators. They may feature eco-friendly hotels, but they usually do not recommend hotels based on their sustainability practices. One exception is Fodor's

¹ Interviews with Ingrambook (wholesale distributor), Avalon Publishing, the Globe Corner Bookstore, and Get Lost Bookstore. Summer 2004

Costa Rica guidebook in that it openly tries to steer readers towards eco-friendly and responsible businesses.

- Coverage of ecotourism and responsible travel focuses mostly on conservation and is quite brief compared to other special interest travel sections. Also, it varies depending both on the writer and how relevant an issue it is for the country analyzed. For instance, Lonely Planet guidebook on Costa Rica explains the main tenets of ecotourism, including the social aspects, and features a case of environmental violation by a large chain hotel.
- Some guidebooks discuss ecotourism in the local context (i.e. Lonely Planet), while others insert the same piece regardless of the country covered in the publication (i.e. Footprint).
- Some discuss ecotourism in just one section (i.e. Footprint); others (i.e. Moon) do so in various sections throughout the guidebook (land and the environment, outdoor activities, special interest travel, organized tours, where to stay, etc).
- Travel Guidebooks now also have websites offering additional features to their readers. Their Internet strategy also includes partnerships with online travel providers—for example, Responsibletravel.com advertises The Rough Guides on its website. <http://www.responsibletravel.com/Copy/Copy101389.htm>

Survey results

- Of 9 publishers contacted, only 4 responded: Rough Guides, Frommer's, Insight-Discovery Channel Guides, and The New Key to Costa Rica.
- All four travel guidebooks seek to promote awareness about responsible travel, especially in destinations where ecotourism has become a popular way to travel. But the way they go about it ranges from recommending lodges and tour operators (Frommer's) to providing a responsible travel code of conduct and tips on how travelers can help advance ecotourism (Lonely Planet)
- Rough Guides and The New Key to Costa Rica are consciously geared to socially and environmentally responsible travelers.
- The guidebooks' coverage of ecotourism is determined, in this order, by: 1) travel industry trends, 2) the writer's own knowledge and travel experiences 3) consumer feedback, 4) other guidebooks' attention to the subject.
- Travel guidebooks' most important criteria for listing tour operators, hotels, lodges, and guides are: 1) Reputation for quality and safety, 2) Experience 3) Price
- They usually update their listings and information every two years when they put out a new edition. In the meantime, they check through site visits, travelers' and industry feedback.

- Except for *The New Key to Costa Rica*, certification is not on travel guidebooks' radar screen. But, they are aware of other initiatives, such as the "World Legacy Awards."
- They see themselves raising awareness about responsible travel by devoting attention to the subject in the guidebooks and through partnerships with businesses and non-profits in the travel industry. As main challenges, they mention: providing accurate and savvy travel advice, and ecotourism claims by "green washing travel guidebooks."
- Awareness of certification programs really varies, but they all say they would welcome more information about existing programs.
- They all see certification as helpful if a reputable organization is granting it.
- Some feel that they would be providing added value to their readers by including information about certified ecotourism businesses. By contrast, others see more value in listing responsible practices and qualified guides.
- None of them seem willing to recommend ecotourism businesses that they have not used/experienced regardless of whether they are certified.
- Travel Guidebooks would support certification:
 - If it is backed up by a legitimate organization that itself has been proven responsible and reliable.
 - If it has a clear and transparent definition of what it stands for, dedication to giving back to the local communities, and minimal environmental and cultural impact.

❑ OUTBOUND ECOTOURISM OPERATORS

The following US and Canada based ecotourism operators were contacted based on their commitment to sustainable tourism 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 the TIES survey.

Survey results

- Environmentally and socially responsible travel is very much a part of part of outbound ecotourism operators' mission, policies, objectives and trips. Some even have non-profit arms (i.e. foundations) as well as partnerships with international NGOs.

- The extent to which they stress responsible travel in their marketing and actual trips varies substantially. Overall, they would raise awareness about responsible travel by partnering with other businesses in the travel industry and/or non-profit organizations and supporting local initiatives through their own non-profits. Two related challenges are educating clients about the difference degrees of responsible travel in light of growing green washing and competing price-wise with large group mass tourism.
- The most important criteria for selecting their inbound partners are: experience, price, commitment to eco/sustainable tourism.
- They check on inbound partners through site visits, tour leaders, and client feedback.
- They are aware of CST in Costa Rica and Smart Voyager in Galapagos but their knowledge of these programs and others is limited, except in the case of tour operators working operating educational trips.
- Outbound tour operators see eco/sustainable tourism certification as a good idea for rewarding companies for good practice, and an incentive for them to improve their operations, socially and environmentally.
- Most tour operators believe it is best to educate travelers as much as possible about these things, but in a relatively discreet manner.
- They feel ecotourists are not as concerned about certifications/awards, as much as them explaining the more generic aspects of the qualities of a lodge or operator for ecotourism, and how that will enhance the traveler's experience.
- They don't actually see themselves raising consumer awareness about certification other than outlining best practices.
- They would support certification programs if they have an open and clear criteria and evaluation system, be easily implemented and adhered to, be well funded, and allow for community programs and small privately owned programs to benefit from it.

□ TRAVEL AND RESPONSIBLE TOURISM WEBSITES

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 the TIES survey.

Survey and Interview results

- The Away.com network runs articles on sustainable tourism in its publication Outside Magazine, so that makes it a clear target for a partnership aimed at educating active travelers

about the benefits of ecotourism and promoting certification. *(Please note that Outside Magazine has independent editors, so they should be contacted directly for article insertion.)*

- Responsibletravel.com advertises The Rough Guide travel guidebooks on its website.
- “Some certification programs are effective, some are less so! So far none of them have generated any meaningful awareness with travelers, meaning that their impact on driving forward customer awareness/sales is very limited.”
- “The way to make these programs useful to the industry is to build trust with customers and to weed out the green-washers.”
- “Most of the people involved in certification are terrific at certification, but have very few marketing skills. Certification organizations need to think about whether they want to be involved in marketing or not. If they do not, then they should think about who they should partner with. If they do, then buy in some top marketing experience.”
- “I’ve always believed in a bottom up approach to sustainability. Given this I do not think we need a ‘one size fits all’ global accreditation scheme – we prefer the approach of accrediting a number of excellent local accreditation schemes. This needs to be marketed effectively to reduce the confusion amongst tourists.

□ EDUCATIONAL AND TRAVEL STUDY PROGRAMS

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.

Survey results

- This is less of a homogeneous group than expected, as they have different missions and emphasis (i.e. culture, conservation, birds). The Nature Conservancy’s programs are closest to ecotourism tenets.
- All in all, people traveling on these programs do not know about certification. Their main interest is nature observation and interpretation.
- Almost all of these programs work with specialized tour operators.
- Sustainability and responsible travel plays a role in partner selection (i.e. The Nature Conservancy Green Guidelines), education and awards programs (i.e. Smithsonian Sustainable Tourism Awards) but for the most part are not used as a marketing tool.
- Audubon Travel Program is unique in stressing responsible travel through its ‘travel ethic.’

- Travel Study Programs' awareness of certification is limited, so they don't see themselves taking the lead with certification. However, they feel certification would be very valuable for them, and would promote it only if it meets minimum standards agreed upon internationally and are widely recognized.

□ GOVERNMENT PROMOTION

- According to *The US Ecotourism Market (2002)* special report by WTO, tour operators do not find national tourism offices useful to them in marketing ecotourism since they are more oriented to mass tourism.
- With the exceptions of Costa Rica and Ecuador, the government role in ecotourism policy development and implementation leaves a lot to be desired. Essentially, there is limited budgetary commitment to developing policies to ensure that tourism is sustainable. Therefore, one should carefully consider whether governments are appropriate vehicles for promoting the use of certified businesses.
- As has been the case in Costa Rica and Ecuador, governments are likely to support certification and promote it through their tourism board, seminars for travel agents in the US and Canada, and partnerships with international organizations, both governmental and NGOs.
- Costa Rica's CST was created as a "State asset." Recently, there has been controversy over the CST as some stakeholders favored its internationalization so as to serve as a model for other Central American countries. It was felt that that the CST would also be more effective if managed by an independent, international NGO created for that purpose. The Costa Rica Tourism Board has opposed this proposal.
- Perhaps the most interesting insight about the role of government in certification comes from a marketing and ecotourism expert interviewed for this project:

“Government role in certification is a necessary beginning condition. It plays a key role in getting programs off the ground...Of course, in light of the Costa Rican government's active involvement in CST, one could argue that if Costa Rica cannot do what its tourism reputation indicates it is doing, then no other country in Latin America can.

All in all, you need both public and private commitment in this. Grants from foreign development agencies should be welcome to make up for the shortfalls or lack of government funding.”

❑ TRADE SHOWS

Literature research

According to surveys conducted for the study *A Review of International Markets, Business, Finance & Technical Assistance Models for Ecolodges in Developing Countries.*, tradeshow are identified by many ecolodges as expensive marketing tools and not effective.

Survey results

- Of 3 tourism trade shows contacted, only 1, *Adventures in Travel Expo (AITE)*, answered the survey. Still, the results of this survey are informative since the respondent is more focused on Latin America than any other show in the adventure segment and is both consumer and trade oriented.
- Environmentally and socially responsible travel is embedded in AITE’s philosophy :
“*Adventure travel cannot exist and flourish without respect for the environment and the sustenance of local culture and wildlife.*”
- AITE promotes and raises awareness of responsible travel in a number of different ways:
 - Encouraging participation of key environmental and responsible travel associations in their expos by contributing complimentary booth space and linking to their sites
 - Devoting a portion of their educational programs for both trade and consumers to ecotourism/sustainable travel and traveler’s philanthropy (*National Geographic Adventure/Traveler* is a key educational partner.)
 - Encouraging the participation of non-profit environmental/sustainable travel association leaders on their Advisory Board (currently TIES and Conservation International).
 - Spreading the message among the travel industry that eco consciousness can have a positive impact on their bottom line.
- Their audience is very diverse – 26,000 attended their inaugural show.
- Their marketing channels include direct email as well as mass market advertising and PR on TV, radio, newspapers and other print media.

Awareness and attitudes towards certification

The following quotes reflect AITE's attitudes towards certification:

- “Certification standards must be realistic: clearly defined and attainable.”
- “Awareness among consumers will drive the demand.”
- “Travel shows can and should be a significant part of the educational process especially when they include substantial consumer reach, but we need a concerted effort to get the word out.”
- “We also need to instill the knowledge within the industry that sustainable tourism and travelers philanthropy offer opportunities for business success. “AITE’s upcoming educational program (October 2004 in San Mateo) is aimed at educating tour operators, travel agents and other industry members on how travel philanthropy and eco-consciousness can have a positive impact on their bottom line. “
- “We would be very receptive to offering a forum for certification at our expos – six throughout the country in 2005.”
- “We support certification and are willing to promote it both among consumers and other industry players through partnerships with non-profits. They strongly feel that awareness among consumers will drive demand.”

CONCLUSIONS AND RECOMMENDATIONS

- As the ecotourism market is not yet demanding certification, the most effective promotion vehicles would seem those closer to the supply side, namely government promotion.
- While the buy-in of tour operators is essential to advancing certification, they would not be priority target for marketing certification. Raising awareness of wholesalers would seem most cost-effective.
- Guidebooks would certainly be willing to include information about certification programs, but these programs must first be credible and successful.
- Websites, including those of ecolodges, seem a cost-effective vehicle for raising awareness about certification. This is consistent with a survey conducted among 15 successful

ecolodges in developing countries according to which the Internet influences sales much more than traditional advertising and trade-shows².

- Certification is not going to give SMEs access to the international market. What's going to give them access is their websites, agreements with online travel marketplaces, and networking with inbound tour operators.
- TIES should offer its expertise to and explore partnerships with travel guidebooks to ensure a deeper and more consistent coverage of ecotourism as well as raise awareness about certification,

² Eplerwood, Wight, and Corvertto. *A Review of International Markets, Business, Finance & Technical Assistance Models for Ecolodges in Developing Countries*. Prepared for the International Finance Corporation, 2004. (page 5)

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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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CONTACTS LIST

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