10 Sustainable Tourism Certification Marketing and its Contribution to SME Market Access

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Chapter Profile

The question of how well certification of sustainable tourism can contribute to building market access for business enterprises has important implications for how NGOs, donors and governments approach their support of sustainable tourism. Most literature to date has indicated that sustainable tourism certification has two benefits: first, improving the quality of management and services of companies and the sustainability of enterprises; and, second, improving the market for certified enterprises. Policy makers have supported certification projects with the understanding that both of these benefits were realistic outcomes of certification projects, without reliable research at hand to validate these views. This chapter investigates whether sustainable tourism certification has genuine market benefits. The authors conclude that, while certification may be a valid method to involve businesses in quality and sustainability oversight of their businesses, there is insufficient evidence to suggest that certification of sustainable tourism will have market benefits, and that such benefits should not be used to justify government, NGO or donor support of tourism certification.

Introduction

The certification of sustainable tourism and ecotourism has gained increasing support as a dual strategy to provide consumers and businesses with an objective source of quality and sustainability assurance information while also building market demand in the ecotourism and sustainable tourism marketplace. In this chapter the authors investigate if market drivers exist for certification or if quality and sustainability assurance alone may have to provide sufficient incentive for tourism providers to certify their products.

Increasingly policy makers are turning to certification as a market mechanism to promote sustainable production and consumption. The most recent such project is the 2003 Inter-American Development Bank (IDB) Multilateral
In the 1990s, there was tremendous interest in the potential of the green market in the USA for a wide variety of consumer goods. The ‘green’ market is loosely defined as the market for products that have been produced without damage to the environment. While there were significant data in the early 1990s to indicate that a growing number of consumers in North America were interested in buying green products (Cambridge Reports/Research International, 1992), however, there is increasing evidence that consumers who have strong opinions and attitudes about the importance of conserving the environment are not acting upon these values when purchasing products. By 2000, the market literature was increasingly indicating that environmental integrity of products is not a market driver.

Perhaps the most important psychographic surveys on this topic were performed by Roper, a leading American consumer research organization, performing the same survey on the marketability of green products twice, once in the early 1990s and once in the late 1990s. These statistically valid surveys revealed that the committed environmental consumer market share in the USA did not grow in the 1990s. It remained at just over 10% of the
market, while the remaining 90% of consumers expressed less interest in environmental purchasing as the decade progressed. Fewer Americans sought environmental labels, recycled products and biodegradable cleansers, or avoided styrofoam and aerosols. This research suggests that, while consumers stated their intention to make environmental integrity a priority, in reality they prioritize price, brand recognition and word-of-mouth recommendations over concerns about environmental impact (Ackerstein and Lemon, 1999).

Except for a few prominent products, most products did not benefit from the ‘ecolabelling’ in the 1990s, according to an investigation into ‘brand greening’. While academics and environmentalists continued to promote the ‘green’ market as one of the most rapidly growing markets in the USA and ecolabelling as a means to reach this market, the reality was different (Ackerstein and Lemon, 1999). For example, the LOHAS or ‘lifestyles of health and sustainability’ market emerged in the USA in the 1990s with highly optimistic projections for market reach. The LOHAS market includes organic foods, energy-efficient appliances, solar panels, alternative medicine, yoga tapes and ecotourism. The Natural Marketing Institute estimates that 68 million Americans, or one-third of the American adult population, qualify as LOHAS consumers, and yet the actual sales data indicate that there is a yawning gap between what consumers say they will buy in surveys and the actual sales data. While the Natural Marketing Institute study indicates that 40% of Americans say they have purchased organic food and beverages, only 2% of the $600 billion food and beverage market comes from organic products (Cortese, 2003). Sustainable products market research expert Harvey Hartman stated in 2004 that consumer research ‘mechanically ties consumer behaviour to consumer attitudes’, and that ‘we cannot quite shed the belief that consumers act merely on their convictions, despite the large and growing body of evidence to the contrary’ (Hartman and Hartman Group, 2003, 44–45).

Sustainable Tourism and Ecotourism Demand

In 1997, the World Tourism Organization presented information to indicate that ecotourism accounts for 20% of the world tourism market. At that time, there were many highly publicized reports indicating that ecotourism was the fastest-growing tourism market in the world. Since that time the WTO has supported a number of studies into the size of the ecotourism market for the International Year of Ecotourism. The 2002 WTO report, which used statistically valid in-flight survey data from the US government, found that the ecotourism market in the US market is closer to 5% of the total number of travellers going overseas. This same study also demonstrated that there is little evidence that the ecotourism share of the overall travel trade was increasing rapidly between 1997 and 2001. The report states that on balance outbound US tourism did not grow rapidly, and there is little evidence that US travellers were the source of the often-cited ecotourism boom (WTO, 2002a). Notably,
a 2003 survey of successful ecolodge owners and regional ecotourism experts worldwide found that the US market was cited to be the largest and most significant ecotourism market in the world (Epler Wood et al., 2005).

These results seem to mirror what researchers have found about the green consumer market as a whole. While there was great optimism in the early 1990s, the reality was different. What fuelled these overestimates? A number of trends came into play. There were many surveys that looked at consumers’ intentions, but few that tested consumers’ purchasing habits. There were also certain countries that prospered greatly, leading to the conclusion that the prospects for the global market were greater than they were. Certain destinations were expanding at double-digit rates between 1986 and 1998 – e.g. Ecuador at 17%, Costa Rica 42%, Belize 25%, Botswana 19% and South Africa 108% per annum (TIES, 2002); however, these countries were known to be stable and had well-developed wildlife parks and reasonable infrastructure. It therefore became increasingly apparent in the 1990s that few countries could emulate these conditions. At the same time the ecotourism market seemed to be very ‘hot’ in certain countries, and yet there was little, if any, serious market survey work undertaken to look at inbound data at the destination level to confirm the exact nature of this trend. It was impossible to find psychosocial data in the 1990s in destination countries that looked at travellers’ interests and attitudes, and there were no studies that looked at the ‘green’ values of the tourists arriving in these ‘hot’ ecotourism destinations. Traveller motivations were studied on a global level, but not on arrival or post-arrival in specific countries. This led to many optimistic conclusions about green motivation for travel without specific supporting data. However, there was one interest group that was expressing increasing scepticism. The ecotourism industry, lodge owners and tour operators were making it known to Epler Wood as president of the International Ecotourism Society that their clients were not mentioning any desire for ‘green standards’.

In 2003, EplerWood International (Epler Wood, 2003) undertook a survey for the US Agency for International Development’s (USAID) Proyecto Caiman in Ecuador with 25 reputable US-based ecotour operators operating both on the mainland of Ecuador and in the Galápagos Islands. The operators surveyed were a highly representative sample of reputable companies operating in Ecuador that seek to meet environmental and social standards. The survey included a question to each owner on the eco-social concerns of their clients, and how this influenced product selection. There was a 48% response rate to these questions. Eco-social concern was defined as ‘clients concerned about environmental and social impacts, and interested in a contribution to sustainable development’. Figure 10.1 reveals that, while 42% of tour operators’ clients are perceived as being very eco-socially concerned, 50% exhibit a low concern for environmental and social impacts. Nearly 70% of tour operator clients express no concern or interest in eco-social issues when selecting their products, and only 8% expressed a specific interest when selecting their tour. These results confirm studies in the broader marketplace that, while there is a genuine concern for environmental and social values in the ecotourism
marketplace, less than 10% of the market booking ecotours with highly reputable ecotourism operators is requesting information from their operators on eco-social standards (Epler Wood et al., 2005).

It would clearly be helpful if we could compare these results from US markets with the situation in Europe. However, in Europe, the research on the ecotourism market was greatly hindered by the fact that the market did not use the term ‘ecotourism’, particularly in the 1990s. The WTO studies on the ecotourism market in Europe were limited, underfunded and based on even smaller samples than the US WTO study referenced above and, according to Goodwin and Francis (2003: 272), although ‘passive and uncritical tourists still outnumber active and enlightened ones’ the balance is shifting.

In the case of the UK, evidence (Goodwin and Francis, 2003: 272) suggests that there is a clear aspiration on the part of consumers to purchase and enjoy holidays that meet a range of responsible tourism criteria. However, the surveys ‘record the views of respondents about how they would like to behave, and do not necessarily accurately forecast how consumers will actually behave when booking holidays’ (Goodwin and Francis, 2003: 277–278). They confirmed that, according to tour operators, destination, price, services and departure dates remain the tourist’s key decision-making criteria.

**Market for Certified Sustainable Tourism**

To date the market for certified sustainable tourism has not been intensively researched and there are no statistically valid studies the authors have been able to identify on the market for certified sustainable tourism. One of the reasons the authors have sought to write this chapter is because considerable investment in certification is being predicated on the thesis that certification will improve the competitiveness of businesses in the marketplace. We could find only anecdotal evidence that this is the case (see, for example, GG21, 2005, suggesting that 76% of enquiries to the three Rivers ecolodge in Dominica stated that being Green Globe-certified influenced customer decision making). The fact that stronger evidence is lacking has been controversial and has caused disagreements in the sustainable tourism academic and practitioner community about the importance of having evidence that certification is a valid market tool.

![Fig. 10.1. Perceived eco-social concern and selection preferences for ecotourism products by ecotour clients in Ecuador (from Epler Wood, 2003).](image-url)
In the late 1990s, over 60 sustainable tourism certification programmes were launched, but only a handful conducted market research to assess the demand for certification. The most current data available come from VISIT, a regional network of European certification programmes (see Chapter 23), which indicates that most German tourists want environmental information about hotels to be included in tour operators’ catalogues (Ecotrans and FUR, 2003). A survey from the English Tourism Council, carried out during the planning of a certification programme, supported the introduction of certification/accreditation with responses such as ‘84% of consumers said they would choose an attraction or accommodation provider that was part of a green accreditation scheme over one that was not, if such a scheme existed’, and ‘58% state that the commitment to being environmentally friendly is important when selecting accommodation’ (ETC, 2002). However, it could be argued that a more holistic approach to consumer purchasing patterns would not bring about the same answers based on the arguments laid out earlier in this chapter. Similarly, a recent study from New Zealand asked whether consumers would be willing to purchase certified products. After defining what certification is meant to achieve, they found that tourists stated pro-certification values (Fairweather et al., 2005).

In the absence of more robust certification demand data, other survey work is often quoted to support the introduction of standards. For example, research for the Association of British Travel Agents claims that 85% of people thought it was important that tourism should not damage the environment, 78% of people considered the provision of social/environmental information by their holiday company as important (ABTA, 2000) and more than 70% of tourists responded that they do not have sufficient environmental information about their holidays (Lübbert, 2001). The UK charity Tourism Concern surveyed readers of their magazine on ethical tourism to find that 96% of respondents who normally travelled independently said they felt that tourism should be fairer for destination communities (Tourism Concern, 2001).

These and other statistics appear to imply that there is a market for sustainable tourism products because these products are sustainable, and they have been used to justify that certification is the right tool to prove this sustainability. Longitudinal data are not available to make comparisons, with the exception of two Tearfund-funded surveys in 1999 and 2001 done using the same methodology and questions showed an increase in this aspiration to purchase an ‘ethical holiday’ from 45% to 52% (Tearfund, 2002, quoted in Goodwin and Francis, 2003: 278), but this gives no indication on how the aspirations can be converted into sales. Conducting market research where consumers are asked to make alternative choices, using more powerful data analysis techniques, such as conjoint analysis, that replicate market conditions, would show how product attributes are prioritized. Better understanding of distribution channels and how these influence decision making would be necessary to uncover if the markets these studies reflect have more likelihood to purchase according to their ethics or not. A better understanding of the attributes that consumers actually use when making decisions, and the priority given to each attribute, is necessary.
Market Positioning

Weeden (2002: 142) has argued that responsible and ethical tourism ‘can allow companies to compete on more than just price’. Many responsible tour operators and lodge owners believe that making their practices responsible helps position them in the market. Positioning is a highly important concept in market literature today because of the difficulty in distinguishing the attributes of products in the increasingly crowded global marketplace. The contention is that the certification of responsible practices effectively helps responsible tourism vendors to distinguish their approach – and thus gives them a unique market position. Of sites certified by the Certified Audubon Signature Sanctuary, 90% believe this status ‘has or will have value in marketing and promotional efforts, with the remaining 10% indicating only that they don’t know’ (USGA, 2004). More specifically, 18% of respondents to the Green Globe membership survey indicated an increased media exposure since becoming a Green Globe participant, while 22 percent of our participants indicated that they have experienced an increase in green market appeal and 8 percent indicated that they have received more customers as a direct effect of being Green Globe Participants’ (GG21, 2004). It would be important to look at the data that the industry is using in order to understand if customers are directly attributing purchases to Green Globe certification or to a variety of factors. Market positioning is difficult to properly assess, and it is rare that consumers have just one motivator to purchase a product.

One of the most frustrating aspects of positioning products in the tourism industry is that the consumer needs to be able to experience the difference. In surveys of tour operators and vendors, EplerWood International found that many businesses note that their clients become much more engaged and loyal as they begin to understand the significance of responsible practices during their travels (Epler Wood et al., 2005). One of the problems with most of the certification schemes is that the difference is not obvious to the potential purchaser before travelling. UK operators who are using responsible tourism as part of their marketing are assuring the tourist purchasing the product that they will experience the difference. An increasing number of tour operators are using this marketing approach (UNEP, 2005). However, further research is required to validate this approach.

Ecotourism certification starts from the assumption that the sustainability message will be a unique selling proposition that will give certified products a competitive advantage through better product positioning. However, psychographic analysis has yet to be applied to the ecotourism field, such as the type that Roper Starch Worldwide performed in the 1990s on green consumers. Harvey Hartman points out that consumers are notoriously inconsistent in applying their values to purchasing, and that current market research fails to reflect on the many factors influencing decision making. He notes that there are core, mid-level and peripheral consumer markets in the ethical marketplace that all apply some level of ethical consideration,
but that only the ‘core’ group responds to ‘knowledge and authenticity factors’. (Hartman et al., 2003: 41). It is likely that it is this group that responds to certification as a marketing tool, but there is no statistically valid information available about the size of this core market for sustainable tourism and ecotourism. In the words of psychosocial market researcher Harvey Hartman, it would help researchers to understand ‘which dimensions of a particular world are likely to have the most impact on a given consumer’s buying decisions, and understanding what product attributes resonate with these dimensions’.

(Hartman and Hartman Group, 2003: 42).

Proponents of sustainable tourism and ecotourism certification suggest that consumer demand for certification will take time to build. According to Amos Bien of the International Ecotourism Society (TIES), ‘Case after case has demonstrated that consumer demand develops long after a certification program is well established’ (Bien, 2005: 16). His recent summary of research on marketing for sustainable tourism and ecotourism certification suggests that consumer demand takes between 8 and 15 years (sometimes as long as 20 years) to develop. Bien states that ‘safety, quality and price needs must be satisfied before a consumer will consider other factors’ (Bien, 2005: 17).

With the evidence that is presently available, it appears that certification can help incrementally with product positioning, and while some businesses perceive that it does they recognize that this benefit takes years to accrue. According to the TIES research (Bien, 2005), an 8–20-year cycle of investment would be required. With this in mind, the authors conclude that certification cannot provide product positioning to the degree necessary for businesses seeking to justify the investment in the traditional 3-year market planning cycle, or even a 5-year market planning cycle, while certification can play a role in product positioning in a much longer period of time, if businesses are willing to invest in this kind of long-term positioning approach. However, this positioning benefit would be viable only if the certification organizations working with businesses have long-term viability and the capability to co-market the certification brand. Early results from Costa Rica and Australia indicate that even the most well-thought-of certification programmes have not been organized to offer a market positioning benefit. Given the fact that neither of these programmes has gained international market attention, it is not surprising that more businesses are not becoming certified.

Branding

The main issue reported in the literature on challenges for certification marketing is that there are too many eco-labels, and that fewer, more recognizable labels would strengthen the brand (Font, 2001; Lübbert, 2001). With an average of only 50 certified products per ecolabelling, the current impact on the market is minimal, and the brand/brands are largely unknown. Either through clustering groups of brands (e.g. VISIT initiative, Network of Americas) or through the expansion of current brands (e.g. Green Globe 21), we
are seeing the development of some regional brands, as fast as the politics between certification programmes allows.

These types of strategies are well reported elsewhere in this book (see Chapter 23), and yet it can be argued that all these brands will encounter financial challenges if they are to become sufficiently strong to be meaningful to their target markets (Font, 2005). After a period of development of bottom-up, locally based, capacity-building certification programmes, it appears that we are moving to a phase where larger brands may dominate and change the profile of this sector. Examples of this are the announcement of the European Ecolabel, mainly known for white goods but now also available for holiday accommodation with high environmental standards, and the new proposal for specific sustainable tourism standards from the International Organization for Standardization.

The current certification brands that do not have a strong foothold in the market will likely lose out when they come face to face with stronger, well-funded brands. Branding, however, is not sufficiently powerful to influence customer choice at present. A study of 100 consumers who booked with NEAP- (eco)certified operators in Australia indicated that not one consumer was aware of the company’s certification and most were unaware of NEAP certification (Planeta.com 2003). Further research is needed to determine evidence if the additional NEAP logo is converting additional clients. It is worth mentioning here that certification programmes often appear to be their own worst enemies. For example, the former Nature and Ecotourism Accreditation Programme in Australia has had three major name or brand changes in 9 years – and with each name change a change in logo, with up to nine different logos (the programme has three categories) in the marketplace for one programme. Yet even the stronger Green Globe brand has very low brand recognition according to a recent study in New Zealand (Fairweather et al., 2005).

The argument here is that brand loyalty in tourism is low, because there is an increasing trend towards trying different destinations (particularly for long-haul holidays). The potential of an international tourist visiting the same long-haul destination, let alone using the same provider, is low. A challenge for sustainable tourism or ecotourism brand loyalty is whether, after having taken a holiday in, for example, a Green Globe 21 certified hotel in Barbados, they will choose to look for a Green Globe hotel when they visit Fiji. There are three problems here: first is that the small number of certified firms severely restricts choice; the second is that the distribution channels for holidays do not make this type of choice easy; and, thirdly the products within the brand are not homogeneous enough to be perceived as a brand. When we look at Green Globe-certified hotels around the world, there is a great diversity, with small and large, business and rural, budget and luxury. The only thing they have in common is caring about the environment.

The next challenge, and more profound, is not the number of brands, but the meaning the brand will have to the consumer. The issues raised in positioning have knock-on effects for branding. Certification is one form of a self-regulating industry and guarding customers against false claims. This, indeed,
is one of the prime calls for the development of ecotourism certification programmes, and certainly it is a highly legitimate reason for promoting certification. Amos Bien comments, ‘it is clear that unless a program is long-established, simply adding a certification logo to a business’ advertising is not going to increase occupancy’ (Bien, 2005: 17). However, he concludes, improved standards through compliance with recognized norms of best practice and cost savings can help justify the certification initiative. The bottom line is that ecotourism and sustainable tourism labels do not convey provide sufficient marketing power to attract consumers.

There are exceptions to this conclusion, when, for example, the product attribute being certified is exceedingly clear and visible to the consumer. With Blue Flag beaches, for example, the cleanliness of the beach and ocean water is being certified. With Blue Flag beaches, the product attributes are clear and meaningful (certification means to the client, above all, that they are not swimming in contaminated water). There are sufficient beaches certified throughout Europe for tourists to now expect their holiday destination to have a Blue Flag, and ask themselves why if it does not. With environmental standards for accommodation, it is a different story. First, the difference between a hotel that consumes little water and energy and produces little waste (amongst other criteria) is not obvious to the client. Secondly, for most clients it is not as meaningful as other product attributes such as location, overall quality, facilities, and so on. Thirdly, there are plenty of hotels out there with the same standards, but not certified.

Distribution of Certified Products

The distribution/commercialization of certified products can take two avenues, targeting the consumer directly and working through distribution channels. Increasingly the travel industry is moving towards direct marketing to consumers via the Internet, but the importance of wholesalers and tour operators in the travel distribution chain, particularly in Europe, remains strong and certification’s marketing benefits must be understood not only via direct marketing to the consumer, but also via wholesale distribution channels. According to Bien,

‘...certification programs’ efforts to market directly to the consumer frequently fail, because there are 1) not enough certified products initially, 2) the cost of direct consumer marketing is extremely high, 3) unlike retailers, who market to consumers on a daily basis [sic] certification programs would have to pay the entire cost of a promotional program, 4) unlike retailers, certification programs are generally unskilled at primary consumer marketing.

(Bien, 2005: 16)

The Certification for Sustainable Tourism (CST) programme in Costa Rica exemplifies some of the problems. It has been consistently referenced as a model for sustainable tourism certification programmes, and has been understood to be the model upon which other sustainable tourism certification
programmes will be based – at least in the Americas, if not worldwide. Yet an independent study (Newton et al., 2004) looked at how far the CST had progressed since its founding in 1996 and found that 5% of the tourism hotel businesses in Costa Rica had been certified by 2004. The investigators sought to understand why there had been limited participation and found many explanatory factors. In terms of the programme’s effectiveness as a market tool for business, it was found that only 8% of the businesses reported that marketing benefits are an incentive to become certified by CST. Nearly half of the certified hotels do not advertise that they have been certified and the researchers found that very little advertising is done for certified hotels by the CST; furthermore, not all hotels that claimed they were certified could be found on the CST website. Other relevant tourism organizations, such as the powerful and influential Chamber of Commerce for Tourism in Costa Rica, are not linked to the CST website and little promotion is done of the CST website by its own governmental sponsor, the Institute for Costa Rican Tourism. The CST website does not allow the consumer to compare and contrast properties in a way that facilitates selection. With only 5% of hotels in the country participating, many properties that are involved with sustainable tourism management are not participating in the programme (Newton et al., 2004). In short, the marketing programme for CST is not reaching the consumer.

This same study also reviewed the marketing outreach effectiveness of the ecotourism certification programme run by Eco-Australia. The conclusion was that, ‘one of the problems that CST and Eco-Australia have is a general lack of awareness for their certifications. Neither program has created a name for itself on the international market, which substantially limits both programs effectiveness’ (Newton et al., 2004: 26).

In general, certification programmes do little promotion of the certified companies because they perceive that getting involved in marketing companies conflicts with the task of evaluating standards, and also because they are often delivered by NGOs and government agencies that lack marketing experience and effectiveness. Leading NGO and donor-funded certification practitioners have suggested that reducing the number of certification programmes and consolidating lists of certified companies to larger, searchable databases would create the necessary economies of scale to make marketing the products directly to consumers via the Internet more feasible and presentable. The VISIT programme has sought to consolidate the information of over 1500 accommodation providers in Europe since 2002 (www.yourvisit.info). The Green Travel Market promotes a range of sustainable tourism products (http://www.greentravelmarket.info), where very few sales can be claimed because suppliers are certified as sustainable (Kusters, personal communication, 23 May 2005). A review of these websites indicates they do not provide the depth and visual presentation that consumers (or tour operators searching for suppliers) shopping the Web expect, and this lack of competitiveness will probably inhibit the growth of this approach unless long-term funding is found to improve these websites to more competitive standards and their competitiveness can be assured via their ability to
attract a market. Rainforest Alliance has just published a catalogue of certified tourism businesses in the Americas and at the time of writing this chapter its effectiveness cannot be evaluated. Bien (2005) notes that certification programmes have to pay the entire cost of a promotional programme and that, unlike retailers, they are generally unskilled in primary consumer marketing.

Both Bien (2005) and UNEP (2005) have found that the real demand for certification is from large purchasers, such as wholesalers, governments or other intermediaries in the commercialization chain, not individual consumers. They note that many tour operators in Europe are implementing sustainability policies and are presently directly inspecting properties to ensure quality and sustainability. From this information Bien (2005) predicts that certification programmes may exert the most influence by providing certified product information for these buyers.

Legislation will soon require large tour operators in Europe to report on their corporate social responsibility strategies, and the resulting requirement for sustainable supply-chain management could drive wholesalers to require the purchase of socially and environmentally managed products. Committed tour companies have shown interest in working with certified products for this reason, even when they are not communicating information on certification to their clients (TOI, 2002, 2004; see also ECEAT, 2005, for a review of the EU-funded project Tourlink, linking tour operator supply chains and certification). In practice, these tour operators set their own standards in most cases, because certification labels are not available in all the destinations where the tour operator works (Font et al., 2004). Furthermore, the task for certification programmes is to prove that the information they can provide for the buyers is reliable, not only on certification issues, but on quality of accommodation, food and service. It would be an enormous challenge for the existing certifiers to offer the larger wholesalers the information they require, which is why tour operators are using their own inspections at present. Most certification programmes do not link quality services to sustainability standards, and it is debatable whether they could add these demanding components to their programme.

Many of the benefits of sustainability standards are not visible to the consumer; tour operators are unlikely to highlight certified suppliers separately according to the labels on the market, thereby undermining the value of a certification label. This is indeed a catch-22. While dozens of tourism certification labels seek to become better recognized in the market, the key buyers – the wholesalers – are not highlighting the certified product they buy because: (i) the labels are not consistently available around the world, and (ii) they do not represent meaningful value added to the consumer. For one season only, TUI Netherlands, which sells mainstream sun-sea-sand holidays, had a separate section of their main summer sun brochure highlighting all the holidays with proven sustainability credentials (through TUI’s own internal verification), but the bookings were so low that they changed their brochures after one season. Sustainability did not work as a selling proposition, and the tour operator had to change its strategy.
The suggestion therefore that certification can be an effective marketing tool via distribution channels has little supporting evidence. Certainly, wholesalers from Europe will be seeking to upgrade the sustainability of their supply chain in the near future, and this is good news indeed. If certification of tourism products could facilitate this drive for sustainability, it would be outstanding. But the evidence suggests that these wholesalers will have to rely on their own property inspections because: (i) there is no identifiable market incentive for them to pay certifiers to do the work for them because they are not highlighting certification labels in their own literature; (ii) certification programmes are likely to have great difficulties delivering all the quality and service information tour operators require; and (iii) certifiers are likely to have the market competitiveness they need to deal with demanding international buyers in terms of providing updated, well-managed information online that can be easily accessed and used by their buyers – at least according to the study of CST (Bien, 2005), which has been represented throughout the NGO, government and donor worlds as a leading example of sustainable tourism certification programmes.

Alternative Approaches to Marketing Sustainable Tourism

Understanding the motivations of the market in the 21st century should be a fundamental part of designing future sustainable development projects, in all green business arenas. Declining demand for existing green products and a demand for convenience, taste and quality seem to override the consumer’s conscience in all but a very small percentage of the market. It may well be that an emotional rush to save our planet made the sustainable development community assume that consumers would make green purchases to save the environment.

The effort to gain a better understanding of the green consumer has led market researchers to conclude that there is a hierarchy of seriousness within the market, from the core groups that value authenticity (identified as about 10% of the market by Roper) to the peripheral groups that are simply looking to have fun – a much larger group. Stanley Plog finds that ‘venturers’ are the target market for ecotourism, and they are defined by survey research as ‘intellectually curious’ individuals who seek to be ‘immersed in destination experiences’ (Plog, 2004: 63). They respond to market messages for destinations that are both ‘unique and involving’ Harvey Hartman (2003) suggests that buyers concerned about sustainability make judgements through ‘subjective–experience orientations’ rather than ‘objective–truth’ thinking.

The book Cultural Creatives (Ray and Anderson, 2002), based on psychographic surveys of 100,000 Americans, suggests that consumers are seeking connections to traditional values that have been lost due to modern progress. Modern societies, according to psychographic market researcher Harvey Hartman have been dominated by technological values since the mid-19th century, and, while hardly anyone complains about the material benefits, there is hunger for a deeper sense of connection to nature, family, elders
and community. With this theory in mind, the ecotourism market needs to help travellers feel they can belong to a world where they can have experiences that transcend material values. The logic of this is that ecotourism and sustainable tourism marketing will need to adopt lifestyle marketing approaches. All the literature indicates that the *Cultural Creatives* market go away on holiday to renew themselves. They want to feel they have had a real ‘experience’ that extends their bodies, minds and souls. King makes the point that ‘life style marketing tends to focus on and confirm more of what the customer would like to see in and of themselves rather than on any physical properties of the product or service being promoted’ (King, 2002: 106). He concludes that this requires that destination marketing organizations reinvent themselves, shifting the emphasis towards preparing customer-focused holiday experiences (King, 2002).

For the sustainable development of ecotourism to grow and offer real economic benefits to local people, it will have to market the essence of what it delivers – nature, interactivity, experiential style, healthfulness, connections with community traditions, and the life-enhancing educational value of products that appeal to an audience that wants to do a good thing for themselves and the planet. For example, the UK is a relatively mature originating market for many international destinations, the third biggest spender on international tourism after the United States and Germany (WTO, 2001). Significant market segments in the UK are seeking more experiential holidays. Travel is increasingly ‘about experiences, fulfilment and rejuvenation’, rather than about ‘places and things’; the lifestyle market is of increasing importance (King, 2002).

**Conclusions**

This chapter reviewed the thesis that sustainable tourism certification provides greater market access for certified businesses, as has been maintained by major donors, NGOs and governments. The literature on green consumerism suggests that, in the early 1990s, the market for green products was growing rapidly and would be based on consumers’ growing desire to have products that are authentically sustainable. However, by 2000, this theory appeared to be increasingly incorrect, and statistically valid studies showed that the market for green products had not grown at all, and that in fact it was static. Similarly, studies in the early 1990s indicated that as much as 20% of the outbound tourism market in the world could be categorized as ecotourism while, by 2002, a study of the US market showed that ecotourism was actually only 5% of the market and had remained static in the 1990s.

Statistically reliable studies on the market for certified sustainable tourism have not been undertaken. Anecdotal information indicates that businesses may be able to more effectively position their businesses in the marketplace if they follow sustainable practices, and that certification may help to validate these practices in the marketplace – but that this process will take between 8 and 15 years.
Multiplicity of brands has left certified tourism products without market traction and certification cannot effectively help to brand tourism enterprises. Efforts to create marketing consortiums of certified product have not created strong Internet presences, and the lack of marketing experience and funding for certification consortiums appears to be making these efforts unsuccessful.

The chapter explored whether certification is a viable tool for providing information for wholesalers. This is particularly pertinent in Europe, where legislation will require wholesalers to purchase tourism products that meet sustainability standards. However, evidence already exists from previous initiatives that wholesalers in Europe have not found certification labels useful in marketing to their customers due to absent consumer interest or understanding of the numerous certification labels presently on the market. The question remains whether wholesalers from Europe will rely on certification programmes to provide the supplier information they need to meet European legislative standards. The authors find that most wholesalers have a record of using their own inspections programmes at present, and it is unlikely that they will rely on certifiers not affiliated with their businesses for the information they require. Finally, alternative approaches to marketing sustainable tourism were explored in this chapter, based on marketing theories, and it was found that a more subjective, experience-oriented approach to marketing sustainable tourism is more likely to succeed than an objective, standards-oriented approach.

Further research will be needed to prove or disprove the arguments put forward in this chapter. While the authors do not contest that certification of tourism has a role in reinforcing the quality and sustainability standards management applies in tourism development, this chapter concludes that the case for certification increasing market access to businesses around the world is so weak that it cannot be used by NGOs, governments and donors as an argument for funding support of certification projects.

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