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CSR in the Tourism Industry?
The Status of and Potential for
Certification, Codes of Conduct and
Guidelines

Study prepared for the CSR Practice
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Investment Climate Department

Rachel Dodds & Marion Joppe

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Acronyms

ABTA	The Association of British Travel Agents
AITO	Association of Independent Tour Operators
APEC	Asia-Pacific Economic Cooperation
CRC	Cooperative Research Centre for Sustainable Tourism
CSR	Corporate Social Responsibility
CST	Certification for Sustainable Tourism
ECEAT	European Centre for Ecological and Agricultural Tourism
ECPAT	End Child Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes
EU	European Union
FIAS	Foreign Investment Advisory Service
FIT	Free and independent travellers
FTO	Federation of Tour Operators
FTSSA	Fair Trade in South Africa
GRI	Global Reporting Index
GTBS	Green Tourism Business Scheme
IHEI	International Hotel Environmental Initiative
ILO	International Labour Organisation
ISO	International Organisation for Standardisation
ISTC	International Sustainable Tourism Commission
IYE	International Year of Ecotourism
NGO	Non Governmental Organisation
SME	Small and Medium Sized Enterprise
STSC	Sustainable Tourism Stewardship Council
TIES	The International Ecotourism Society
TOI	Tour Operators Initiative
YCI	Youth Career Initiative
VFR	Visiting friends and relatives
VISIT	Voluntary Initiatives for Sustainable Tourism
WTO	World Tourism Organisation

Executive Summary

For the past 20 or more years, sustainable development has been at the forefront of many government agendas. This debate has concluded that sustainability should be adopted as the way forward to preserve ecosystems and biodiversity, limit growth and improve the quality of life of host populations. Tourism has been put forth as a way to gain income and provide access to market opportunities for small and medium size enterprises, especially in low income countries. There has also been no shortage of research supporting the need to keep tourism pressures in check, address existing impacts and extend the planning horizon to create more sustainable development in the longer term.

The past few years have seen a steady growth in the adoption and endorsement of the principles of sustainable tourism as a development approach which has led to the creation of many initiatives to address concerns such as environmental conservation and protection. Social issues were brought to the forefront more recently, particularly since Kofi Annans' 10-point Millennium Challenge, and include fair trade, poverty reduction, local and community economic development. Initiatives include codes of conduct, specific guidelines and certification schemes and accreditation.

This study is a follow-up to earlier reports commissioned by the World Bank Group which have assessed *Company Codes of Conduct and International Standards, Implementation Mechanisms for Codes of Conducts* as well as various *Foreign Investment Advisory Service (FIAS)* reports. The objective of this study was to assess whether the development of national certification schemes may help countries to a) address expectations of tourists, investors and supply chain actors such as tour operators and travel agencies, b) ensure the sustainable development of their tourism industry, c) ensure a localisation of the corporate social responsibility (CSR) agenda by guaranteeing that certification standards are developed in accordance with national criteria and d) whether certification schemes have contributed to spreading sustainable tourism practices or would align with international criteria or standards.

This report finds a number of limitations as well as opportunities. For a variety of reasons, sustainable tourism has gained increased recognition among industry and governments. However, according to travel trade interviewees, only a small percentage of consumers pay attention to these standards and for all intents and purposes, none are willing to pay extra for adherence to environmental and/or social standards. In spite of this, industry has increasingly focused on sustainable/responsible tourism measures and practices, particularly in Europe. Industry associations, Non Governmental Organisations (NGO's) and governments have been effective in developing guidelines and policies relating to sustainable tourism, but there is a need to focus on the implementation of these guidelines to move the agenda forward.

Through secondary research as well as interviews with over thirty large and specialty tour operators, certification programs and tourism experts, this report found that certification schemes, although increasing in their number and scope over the past ten years, have not enabled Small and Medium Sized Enterprises (SME's) greater access to market opportunities, nor have they moved the tourism industry significantly forward towards sustainability. Guidelines within the industry are becoming more common, however, implementation and evaluation is still weak. What has been positive is that the efforts of

certification programs have enabled companies to reduce costs, mainly related to the environment (water, waste, and energy savings). This cost saving advantage or training aid has helped improve management practices and processes, however there is little incentive to continue being part of a certification label as there is no proven marketing benefit. Certification programs are costly to run and most are subsidised by governments or international funding agencies. They are also costly to join for the individual operations, and so far have not delivered on promised marketing benefits and consumer awareness. Overall, industry awareness of such schemes is negligible. On the other hand, certification in eastern Europe has helped increase awareness of some niche products, such as non-tourism related companies (organic farms), by bringing them into the tourism fold, through agritourism-type packages. This is only marginal and countries are still very much dependant on larger tour operators and travel companies to promote their product.

To date, CSR is largely driven by publicly traded European companies who see it as a way to reduce any potential risks that might negatively impact on the value of their stocks. Thus, they will work with their supply-chain partners to ensure that these, too, will be more environmentally – and increasingly, socially -, responsible in their operations. For transparency purposes, they expect annual reports from their partners that document improvements made, and will usually provide technical/structural assistance (ensure local participation, community involvement and stakeholder dialogue) and expertise to help them tackle improvements year over year.

If certification is to continue and be successful, a number of criteria are needed. First, there is a need for one global body to set and monitor the adoption of industry wide criteria. Second, there should be more business to business marketing rather than business to consumer, as consumer awareness and interest are extremely low. Third, demand needs to be created among consumers through increased industry responsibility reporting and educational campaigns. Fourth, if certification is to be successful, there is a need to achieve critical mass. Currently there are fewer than 1% of companies worldwide that have achieved certification and therefore even those tour companies interviewed that would be willing to support such initiatives do not have enough product to choose from which will not alter their cost base, as tour operators are still driven primarily by price. In the Americas as well as Europe, there have been efforts to amalgamate certification schemes, however the complexity of programs and politics in different countries has not permitted much success. Fifth, quality must be linked with environmental and social management so that certified products can guarantee that a level of quality has been achieved and the 'experience' of the product is still elevated.

As this report called for the evaluation of using CSR in the tourism industry, there are a number of recommendations put forward. CSR calls for consistent sets of policies, practices and programmes that steer business operations. For this agenda to be promoted, each stakeholder group must play a critical part. Certification, although fundamentally a positive approach, is not having a significant effect on spreading sustainable tourism practices overall. Initiatives focusing on the larger players will have more impact as the majority of tour operators and hotel groups have operations in developing countries and are key buyers in the industry. The focus on CSR initiatives, educational and training campaigns for the industry as well as education of the consumer, could have higher initial impacts than attempting to move certification forward to become more mainstream.

Overall there is a need to:

- Agree on international standards that can be addressed step-by-step and seen as appropriate by local and international operators
- Build on the work done to date by organisations such as FTO & VISIT (Tourlink), ISO and the European Union Flower
- Link quality with environmental and social criteria in guidelines, reporting and accreditation efforts
- Pressure associations to integrate and implement guidelines
- Consolidate guidelines and charters to be wide reaching and industry specific (tour operators, hotels, etc.)
- Utilise the existing certification framework; however create a brand around local community action and CSR focused initiatives for businesses to see it as a viable business proposition
- Link development monies with CSR criteria so that developers and managers focus on a longer term framework for product life cycles

Industry to:
- Adopt and implement sustainable supply-chain initiatives (this will aid SME's in low income countries through a trickle-down and multiplier effect)
- Report on corporate social responsibility initiatives
- Focus on business to business marketing rather than business to consumer marketing (as consumer awareness is currently low)
- Continue to raise awareness to consumers through philanthropy and marketing efforts
- Adopt certification or use certified products through supply chain partners

Governments to:
- Develop holistic and comprehensive tourism development strategies in partnership with community and industry stakeholders (including major foreign tour operators or industry associations, where appropriate), that include realistic expectations for the social, cultural and environmental benefits to be reaped from tourism
- Create positive investment structures to support and encourage sustainable development of tourism destinations
- Pressure industry associations to report on how they are achieving more sustainable tourism (e.g. industry associations are asking their members to sign up to guidelines and charters but few are enforcing this as a criteria for membership)
- Legislate for corporate social reporting
- Facilitate arenas to share best practices between sectors (hotels, tour operators, airlines and cruise lines) so that they can learn from one another
- Ensure sustainable tourism measures are seen as a core value in wider development plans and policies rather than solely focusing on economic benefits
- Legislate or provide incentives to businesses who adopt internationally recognised certification schemes or standards within their country

Previous reports have pointed out disagreements with how far down the supply chain companies should monitor, that there is little standardisation in the monitoring or reporting of companies, and that there is a need to focus on *why* standards are not being implemented. This report acknowledges these issues and also recognises that CSR within the tourism industry is behind other industries in all aspects. However, as tourism affects

so many other sectors and is a critical economic driver in low income countries, it is believed that great strides can be made to address concerns of poverty alleviation, local economic development and conservation by pushing for greater adoption of CSR. This study highlights current issues for sustainable tourism, certification and codes of conduct, identifies key challenges that tourism will continue to face, and proposes some recommendations for CSR implementation.

1 Overview

1.1 Introduction

The worldwide tourism industry currently accounts for 760 million people and accounts for roughly a tenth of global employment and capital formation. In most countries, especially low income countries, tourism is seen as a viable option for economic growth, but current unsustainable tourism practices can impact the health and well-being of the environment and community as well as tourism itself. In many low-income countries tourism is significant to the economy or is growing, and long-haul travel is growing at the fastest rate (doubled from 1997-2001)[1].

In most industries, CSR standards and practices have been developed by the private sector to respond to external pressure. In tourism, however, the use of codes of conduct and certification is not widespread and is not based as yet upon agreed international standards. It is difficult to make generalisations about CSR without first examining the context in which sustainable tourism operates, its demand and also assessing the numerous certification schemes, codes of conduct and best practices within the industry.

The purpose of this report is to inform FIAS advisory work on CSR and certification with regards to the feasibility and desirability for low income countries to use certification and accreditation as tools for sustainable development.

1.2 Background & Methodology

This study is in response to the World Bank's research on CSR codes of conduct and social and environmental guidelines. The World Bank's CSR Practice Investment Climate Department commissioned research to determine whether adopting national certification schemes built on private sector standards and whether these initiatives can be used to enhance both the country and visitor experiences. It is assumed that enhancement would result in better promotion and marketing, which would lead to increased market opportunities through better linkages into the supply chain.

This report is based on both extensive secondary research and a large number of key informant interviews. First, a review of existing research on codes of conduct and certification schemes was undertaken, followed by a review of research on the demand for sustainable tourism. Supplementary interviews with key stakeholders, experts, scheme directors, tour operators and travel providers were then carried out to assess demand for sustainable tourism, the success of certification schemes and consumers' willingness to pay. Companies approached to be interviewed included the largest tour operators, specialty operators in both Europe and North America, certification programs and industry experts (see Appendix A for the full list of organisations interviewed).

It should be recognised that this report is not exhaustive in its nature as not all codes of conduct or certification schemes were analysed. In addition, some potential interviewees could not be contacted, and therefore some opinions may have been omitted.

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[1] Tearfund, 2002

Once codes and certification schemes were identified, they were assessed with regard to broad CSR categories, such as their human rights, labour rights, environmental standards and social and community impact. The tourism sector's codes of conduct and certification schemes were analysed to gauge their effectiveness and market potential. Interviews with certification players as well as large and eco/adventure tourism operators and travel providers were also undertaken to evaluate the benefits of certification schemes and to determine demand for sustainable tourism.

In the interest of obtaining as much information as possible from interviewees, assurances were given that no direct quotes would be used to identify them or their company. Therefore, all statements are those of the authors' and should not be attributed to any particular interviewee.

2.0   Components of Sustainable Tourism

Sustainable development has been defined as development that meets the needs of present and host regions while protecting and enhancing opportunities for the future. Sustainable tourism, in addition to the criteria of sustainable development requires a holistic, integrated perspective that takes into account all the industries and resources upon which tourism relies. The set of criteria or principles that define the conditions for its achievement comprises:

- Protect and conserve sustainable resources
- Be a multi-stakeholder approach
- Be environmentally responsible
- Maintain the well-being and involvement of the local population or host
- Provide meaningful and fairly remunerated employment for the host population
- Have economic benefit
- Have a long-term view
- Have a triple-bottom line approach (environmental, social and economic)
- Be equitable
- Government must play a leadership role (e.g., impose a 'greater good' approach)
- Obtain optimum guest satisfaction and educate tourists about environmental and social concerns

The definition of corporate social responsibility (CSR) has many similar elements to sustainable tourism in that both focus on how stakeholders should be identified and engaged and that initiatives should be measured to determine their impact on others. Whereas CSR relates to a company's obligation to be accountable to all of its stakeholders in all its operations and activities with the aim of achieving sustainable development not only in the economical dimension but also in the social and environmental dimensions, sustainable tourism was first seen mainly from an environmental perspective and has only recently incorporated social and community aspects. Today, it is commonly recognised that sustainable tourism is more than just environmental conservation of a natural area, but that is must also address the quality of life of those visiting it and those being visited.

Sustainable tourism development is about making all tourism more compatible with the needs and resources of a destination area. Tourism needs to take into account a holistic and comprehensive approach that balances tourism development with other activities yet tourism is made up of many sectors and is very fragmented, therefore effects and monitoring processes through one company or mechanism has been difficult..
The supply chain of product to end user is not often controlled by solely one party or individual and different elements are often operated by multiple stakeholders. This therefore has led to difficulties in controlling elements of corporate social responsibility.

Box 1 - Bungalow Beach and Kombo Beach, the Gambia
At Kotu Beach in The Gambia, staff at the Bungalow Beach and Kombo Beach hotels have helped to make a big difference to the earnings of local people and create a more relaxed environment for their guests.

Until recently guests at the hotels were constantly approached on the beach by various local vendors offering them goods such as fruit and fruit juices. The hotel guests so disliked being harassed they were discouraged from using the beach and both the hotels and tour operators viewed it as a major issue. In an innovative project completed in 2002, the juice pressers, fruit sellers and the craft sellers in the local market worked with the local hoteliers to understand and find ways to overcome the problem. . It used a multi-stakeholder approach to bring together the informal guides, fruit sellers, juice pressers and craft sellers with the tour operators and hoteliers to discuss how things could be improved. The juice pressers and fruit sellers were keen to reduce the level of hassle on the beach. Each adopted codes of conduct which they now enforce as a group. The hotels also assist the women's' marketing efforts by putting up 'What's On' boards in the hotels to advertise the stall. The women have higher earnings and the hotel guests can use the beach again without being disturbed. Incomes at the craft market increased three-fold between the two seasons – the tourists spend more when they are not pestered in the market and some new products and better merchandising have also helped. [2]

Box 2 - Banyan Tree Resorts and indigenous artisans
A number of rural communities in Asia have been engaged to make cushions and tapestries for the guestrooms of Banyan Tree resorts. These initiatives complement ongoing efforts by Banyan Tree Gallery to showcase cottage crafts and the work of indigenous artisans at its lifestyle galleries, as well as the Museum Shops, a collection of outlets in Singapore museums from which visitors can purchase a piece of ancient Asian art recreated as contemporary ornaments, accessories and stationery.

This arrangement has the two-fold benefit of keeping traditional arts and crafts alive while providing Asian communities with a means of earning a living.

www.banyantree.com/greenimperative/businesses.htm

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[2] Greenhotelier, 2003

2.1 Labour standards as part of sustainable tourism

Environmental aspects have been the priority of official certification programmes and voluntary initiatives since the early 1980's and only recently have social or community issues been added. Human rights and labour issues have been more focused upon in developing countries rather than in Europe and North America, partially because social legislation has been more comprehensive in Western countries. Additionally, more advanced concepts such as "the triple bottom line" (environmental, social and economic) are just now being incorporated into definitions and initiatives.

There are a number of labour issues which affect the tourism industry. These include women's rights, fair wages, long working hours, qualification and skills requirements for employees, inability to join trade unions, importing of labour and displacement of traditional employment to benefit from tourism dollars. Tourism workers often do not earn a living wage and are dependent on tips and service charges. Many workers have temporary contracts or none at all, work long hours and are employed in low skilled areas such as waitressing and/or house cleaning.

According to the ILO, tourism workers and managers are often "imported" by the large international hotel and leisure chains (six of the seven leading multinationals of the sector are North American), which pick up the major part of the profits. By contrast, local populations benefit only from low or semi-skilled, poorly paid jobs (cooks, maintenance workers, chambermaids, barmen, gardeners, bus drivers, etc.). According to a report recently submitted to a tripartite meeting of the ILO, this sector is known for low pay (for example, in the European Union, it is less than 20 per cent of the average salary), difficult working conditions (irregular schedules, Sunday/holiday work, unpaid overtime), and many clandestine jobs. Women make up 70 percent of the labour force in tourism and there are numerous cases of youth or child workers (half the workers in the sector are up to 25 years old[3]).

Although few tourism codes of conduct, industry policies or schemes (see appendix B, C, D & E) so far have specifically addressed labour or human rights concerns, child labour and prostitution have been widely addressed in the Caribbean, Thailand and parts of Africa through initiatives such as ECPAT (End Child Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes) (see Box 3). Awareness of exploitative labour has also increased due to campaigns such as the recent initiative by Tourism Concern: Sand, sea and sweatshops.[4]

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[3] Report on the Tripartite Meeting on Human Resources Development, Employment and Globalization in the Hotel, Catering and Tourism Sector, 2-6 April 2001. Sourced at http://www.ilo.org/public/english/bureau/inf/magazine/39/tourism.htm

[4] Information found at www.tourismconcern.org

Box 3 - End Child Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes (ECPAT)
Since 2002, major hotel groups, airlines and tour operators have signed up to the code which involves
- establishing an ethical policy regarding commercial exploitation of children
- training staff
- providing information to officials about abuse at various destinations
- and providing information to travellers (in-flight videos and flyers)

Some programs which have developed out of ECPAT include The Youth Career Development Program which has expanded to be the Youth Career Initiative (YCI). YCI contributes towards the eradication of the commercial sexual exploitation of children by giving girls aged 17 to 20 employment training for the hotel and travel industry. The program targets youths from poor communities and the program uses hotel expertise in human resources development to provide disadvantaged youths with the skills to work in the hotel and travel industry. The program started in Thailand in 1995 and has grown from 9 graduates and one hotel in 1995 to 550 graduates and 23 hotels in 2003. The program is now being extended to the Philippines, Romania and South Africa.

www.ecpat.net / www.yci.org

Governments, NGO's and the industry are only now starting to address these issues (see section 5), and although environmental elements and biodiversity issues are a crucial underpinning to achieving wider sustainable tourism development goals, it is now being recognised that labour and community equality/participation issues do affect the success of the tourism product and experience.

3.0 Demand for Sustainable Tourism / CSR within Tourism

Within the tourism industry it is generally agreed that there are increasing overall societal and environmental concerns, and that this will increase the demand for more sustainable destinations and travel preferences. These, in turn, will increase the pressure for destination management policies and tour operator responsibility. The destination developments of the 1960/70s, which were the result of overbuilding, are expected to face severe decline as consumers look for more attractive destinations that feature a clean environment and well preserved natural and cultural attractions. Another trend affecting sustainable tourism is health and wellness. Active or adventure holidays, wellness and spa products and sun destinations are likely to increase in popularity. Authenticity or 'experiential tourism' is another trend. Artificial type destinations (e.g., theme parks), which do not meet higher consumer quality standards, will decrease as the consumer searches for the greater authenticity. Furthermore, there has also been an increase in tourists seeking meaning from their vacation experiences with a resultant noticeable increase in the number of organisations that offer volunteer based travel or educational

travel, notably from non-traditional NGO's such as Volunteer Services Overseas (VSO), etc.

The market share of sustainable tourism is difficult to assess as many consumers do not just purchase one type of holiday. During the same year, they may choose a typical package sun and sand holiday as well as one that specifically caters to nature and adventure. Sustainable tourists are approximately 50% free and independent travellers (FIT) and 50% package tour travellers (those travelling with a tour operator)[5]. The majority of tourists seeking nature or adventure type holidays typically travel with niche or small scale operators as mass operators tend to accommodate sun, sea and sand packages. The number of operators offering more nature or adventure tours has increased in Europe over the past few years, whereas in North America, specialty travel operators have existed for over a decade.

3.1 Demand for sustainable tourism

Overall, the percentage of consumers who consciously look for sustainable travel packages or ecotourism has been estimated to be as high as 5% of the overall market for travel, although up to 30% feel that it would be 'nice to have' but without an accompanying willingness to pay (World Tourism Organisation-WTO). With increased awareness of general societal issues regarding sustainability, this number is expected to increase somewhat.

Sustainable tourism demand is difficult to assess as most figures are anecdotal evidence of market share. A number of surveys have been completed over recent years[6] which have assessed demand for more sustainable forms of travel. A report by the WTO in 1997 presented information to indicate that ecotourism (not sustainable tourism) accounts for 20% of the world tourism market. The International Ecotourism Society Report, whose statistics were cited worldwide in other reports, indicated that ecotourism contributed US$154 billion in receipts for 2000 and was growing at a rate of 20% per year compared with 7% for tourism overall. This number has not been substantiated in any recent reports.

According to National Geographic, there are 55 million 'geo-travellers' in the United States who are environmentally and socially responsible and have *ceaseless expectations for unique and culturally authentic travel experiences that protect and preserve the ecological and cultural environment*. 38% of these travellers would be willing to pay a premium to patronise travel companies that use sustainable environmental practices (although it should be noted that only 1% of US travellers take holidays overseas). In Europe, 95 % of Swiss tourists consider respect for local culture to be highly important when choosing a holiday[7] and approximately 87% of respondents in a responsibletravel.com survey suggested they were also interested in locally produced food, local culture and using local guides when on holiday. The Association of British Travel Agents (ABTA) survey said that it was very important that their holiday did not damage the environment (45%) and that it benefited the people of the destination they

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[5] IFC, 2004

[6] Travel Industry Association GeoTourism Survey (ABTA's Mori Study (2002), Responsibletravel.com (2004), TIES (2002), Tearfund (1999) etc.)

[7] Switzerland Travel Writers and Journalism Club (www.fairtourismsa.org.za, 2005)

were travelling to (for example, through jobs and business opportunities (30%). None of the tour operators interviewed have found that their clientele was willing to pay a premium for these criteria to any substantial degree.

Although consumers may indicate that they expect environmental and social issues to be taken into consideration on their holidays, they do not take it upon themselves to ensure these criteria are being met. Responsibility for ensuring more sustainable tourism falls in the hands of the operator. In the UK, over 80% say tour operators should have responsibility for preserving the local environment and culture and ensuring that local people benefit from tourism. The same percentage of people are more likely to book a holiday with a company with a 'responsible' travel policy – a 28% increase since 2001 (responsibletravel.com survey, 2004). A report in 2000 declared that 55% of consumers believed that travel agents have a responsibility to provide the information, while 48% think tour operators should provide it[8].

Social or environmental considerations, although they may be expected to be addressed in the brochure or on the website of an operator or travel provider, are not demanded when booking travel packages. From interviews with large and specialty operators it was found that no specific consumer requests for specific environmental or social criteria were requested or enquired about when booking their holidays. The only customer issues or questions were regarding stray animals or if there was an animal protection group to look after stray dogs or donkeys clients had encountered. Additionally, environmental and social criteria do not affect most tour operators' choice when selecting their package components as their primary focus is on price and second on quality[9]. In a study done in 2003, almost 70% of tour operator clients expressed *no* concern or interest in eco-social issues when selecting their products and only 8% expressed a specific interest when selecting their tour[10]. Overall, less than 10% of the market booking ecotours in the US is requesting information from their operators on eco-social standards[11].

Examining eco-tourism, a WTO report in 2002 prepared for the International Year of Ecotourism (IYE) found that ecotourism was closer to 5% of the market compared to 20% as reported in 2000 and although awareness had increased, there was little evidence that ecotourism had been growing, let alone rapidly. Furthermore, although a 2003 survey of successful ecolodge owners and regional ecotourism experts worldwide found that the U.S. market was cited to be the largest and most significant ecotourism market in the world[12], the GeoTourism study found that less than 10% of the 55 million that were classified as *geotourists* preferred to travel outside of the United States[13], therefore hardly contributing to tourism revenues in low income countries.

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[8] Tearfund, 2000
[9] Interviews with tour operators and travel companies
[10] Font & Epler, 2005
[11] Epler-Wood et al, 2005
[12] Epler-Wood et al, 2005
[13] TIA, 2003

3.2   Consumer motivations

Consumer surveys indicate that there is a willingness to pay for more sustainable types of tourism. In the STI survey (2004) 75.4% of self-declared environmentally oriented consumers declared they were willing to pay $1-20 extra per ticket to mitigate the green house gas effects of their travel. Seventy-seven declared they would switch online travel sites to one that made contributions on their behalf to offset the portion of their emissions. The National Geographic geotourism survey suggested that 61% of those interested in environmentally and socially sensitive travel would pay 5-10% more to use such companies. The Mori (2002) study suggests that package holiday makers would pay more if money went towards preservation of the local environment and reversing some negative environmental effects of tourism (47%), workers in the destination are guaranteed good wages and working conditions (49%), hotels serve food produced locally (36%) or money went to support a local charity (22%). These consumers said they would be willing to pay up to 10% more for a holiday (1-2% more = 36% of holiday makers, 5% more – 39%, 10% more = 18%).

In practice, however, there was no evidence that this research led to actual purchase behaviour. From interviews conducted, there was no indication that consumers were willing to pay more for sustainable tourism products even though they may indicate it in research. As one industry leader noted, "In several surveys done in the last years, a considerable number of people always affirm they would be ready to pay for it. But unfortunately the reality shows that the customer's decisions are often dominated by other criteria, and mostly by price. There is obviously a contradiction between intention and behaviour. It is what we call a cognitive dissonance. However, in many destinations, it is common practice that tourists on an excursion in wildlife reserves pay an extra fee for nature protection activities and this is well accepted".

For example, TUI offered a program for ski holiday tourists to purchase a tree to reduce carbon emissions (£10 purchased a tree and a map of where it was planted). Only 1 in 20 bookings subscribed to the program even though it was listed on a full page of the holiday brochure. Specialty operators also did not have much participation, either. Explore, the UK's largest adventure operator, offered clients to offset their emissions through Climate Care. There has only been a 3% participation rate. By contrast, niche operators see environmental and social issues as part of their core business and often have programs to support such initiatives (see appendix C). These operators are more likely to search for accommodations or areas which are seen as 'green', however, due to a lack of critical mass and awareness by operators, there are few examples of companies using certified accommodations.

Sustainability issues are also not perceived to be a key factor in the tourist decision making process. A report in 2000 notes that surveys have been unable to conclude that environmental, social or sustainability criteria are a key concern in holiday decision-making by tourists – even so-called ecotourists are not often motivated to travel because of interest in being 'responsible' or 'environmentally concerned[14]. It is clear that marketers need to connect consumer motivations with actual purchasing. As one expert noted, "consumers are willing to make a greener choice if the product comes from a company [or destination] they already know and trust, it doesn't require (m)any

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[14] Tearfund, 2000

behavioural changes to use, and it's at least as good as what they're already buying in terms of aesthetics, style, taste, etc.".

The majority of travel globally is still mass tourism which consists mainly of sun, sea and sand tourism package holidays provided by large operators (TUI, First Choice, Mytravel). Price, accommodation quality and personal security rank as the most important considerations of booking holidays[15]. Consumers are susceptible to health and safety issues, however, with cleanliness and quality being major factors in their destination choice. From existing research and interviews with tour operators and other experts, it can be concluded that consumers would change their destination choice as a result of bad press about health[16] (e.g. dirty beaches) or safety issues, but not for lack of environmental or social responsibility on the part of suppliers.

If evidence suggests that consumers are looking for more sustainable product in tourism yet are driven mainly by price or health issues, there is a need to rethink a strategy to shift product and packaging so that product offered to the consumer integrates wider issues of sustainability.

4   Overview of Certification Schemes

Certification can be described as the process of assuring consumers and industry that the company being assessed has met a set of minimum standards. Within the tourism industry, certification started in the early 1990's. Since 1992, a number of schemes have been developed (see appendix D & E).

The purpose of certification has been to achieve voluntary standards of performance which meet or exceed baseline standards or legislation. The process starts with a body that sets credible certification standards (through standards which are industry relevant, measurable and obtainable). The certification body must be without conflict of interest and the indicators should be recognised by an accreditation body. The applicant or business then is assessed according to the indicators and, if successful, receives recognition, usually through the form of a logo, to inform the consumer that they have met minimum criteria. The aim of certification is to foster responsible environmental, social and cultural behaviour and provide a quality product to consumers. To be considered reliable, certification programs need to have a 3rd party audit and effective assessment as well as clearly defined accreditation criteria.

According to Toth (2002), elements of a credible certification system include:

- Adequate, appropriate standards developed/accepted by all affected interests - interpretation of standards;
- Trained, qualified assessors - standard defining training and qualifications;
- Professional/ethical operations at all levels with no biases or conflicts of interest;

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[15] Mori, 2002, Anavo & STI, 2004, WTO, 2001, Tearfund, 1999
[16] 80% of Mori respondents said their destination choice would be affected by sea pollution or dirty beaches, 50% air or noise pollution, 80% crime

- Qualified, financially stable certifying body - if there are multiple certifiers, an accreditation mechanism is needed;
- Even-handed certification and accreditation;
- Transparency;
- Defined procedures;
- Appeals mechanism;
- Recognition by relevant agencies and/or customers - compliance with accepted criteria (e.g. ISO/IEC Guides) facilitates recognition; and
- Acceptance in the marketplace or by regulators - marketing and promotion[17]

It should be noted that the above definition defines elements of a credible certification system, not necessarily one that incorporates all elements of sustainable tourism. As many schemes do not address social or labour issues in detail, these issues have not been addressed to date.

4.1 Development of Schemes

There are many certification schemes regarding tourism that relate to sustainability. The best known NGO or country initiatives include Voluntary Initiatives for Sustainable Tourism VISIT (Europe-wide), the Costa Rican standard Certification for Sustainable Tourism (CST), Green Deal (Guatemala), and Scotland's Green Tourism Business Scheme (GTBS). The best known industry certification programmes are Green Globe and Blue Flag. Green Globe offers product as well as destination certification, while Blue Flag certifies beaches. There are two industry based standards which do not solely address tourism: ISO 14001 which addresses environmental impacts and ISO 9001 which addresses quality assurance (both mainly used by larger hotels rather than small operators or accommodations). The majority of funding and attention towards certification has addressed tourism-only schemes. These are the 'eco' schemes that focus mainly upon SME's.

A number of eco certification projects are in the pilot or development phase such as Mexico, The Caribbean, Sub-Saharan Africa and Peru and countries such as Kenya and Botswana are considering them. The majority of European ecolabels have related to environmental criteria, however, developing countries such as the Americas and South Africa have included social and cultural aspects as major components.
Development of certification and eco-labels has been irregular and although there are benefits of putting forth such programs to set baseline standards, programs are not world-wide, nor is there a critical mass of certified products. There are few programs in low income countries as 2/3 of the approximately 7,000 certified tourism products are in Europe[18]. Approximately 40% of programs started before 1996 with an additional 40% between 1996-2000 and a number of new initiatives developed since 2000 (European Centre for Ecological and Agricultural Tourism (ECEAT), eastern European programs and Central and South America).

Programs and practices vary region to region. Most schemes are national in scope, such as the CST, Guatemalan Green Deal and South Africa's Fair Trade Tourism label. The

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[17] Toth, 2002
[18] Interview with certification experts and Font, 2003

model for certification in Latin America is the CST and this is now being expanded to become the Network of the Americas to include Guatemala, Brazil, Ecuador and other newly proposed schemes[19]. Most countries in this region have implemented (or plan to such as Mexico & Peru) a national program using the CST as a model 'although the costs of starting and operating a certification program have meant there has been little progress'[20]. Although publicised as a model for tourism certification, the CST program has few certified products and the Network of the Americas does not have many in total (e.g., only 21 products have been certified in Guatemala).

In Europe, the VISIT program has created an inclusive system to raise standards and cooperation among current European programs, and markets approximately 4,000 certified products through ethical trade fairs (green travel market) and to tour operators. The most successful certification program, Blue Flag, has extended its program outside Europe to the Caribbean, North America and Africa although this program only applies to the certification of beaches.

Green Globe is an industry standard which currently operates out of Australia but has certified properties worldwide. Destination certification has been gaining momentum in recent years due to issues of sustainable destination management and Green Globe's program offers a comprehensive approach for multiple players. Measurability and implementation of this scheme, however, has been questioned. Green Globe is one scheme that does offer certification of more than just ecotourism or small scale products as they offer services for tour operators, hotels, destinations, etc. Some larger scale companies have obtained certification (all-inclusive resorts such as Sandals, Casuarina Beach, Almond Beach and some Hilton and Marriott properties).

In 2002, a project called the Sustainable Tourism Stewardship Council (STSC) was set up with the aim of harmonising and providing mutual recognition of schemes, and to set up an international accreditation agency – but little progress has been made since its inception. Reasons include the lack of an over-riding body to adopt international certification, confusion of existing criteria and competition between existing schemes (who did not want to merge their labels).

The majority of certification schemes accredit accommodations (approximately 63%), whereas only 7% address tour operators, mainly ground operators specifically dealing with ecotourism[21]. Approximately 40% of the criteria or indicators in standards relate to management issues and the remaining 60% relate to specific actions such as environmental benchmarking (34%), economic indicators (8%) or socio-cultural criteria (12%)[22]. The majority of programs to date (with the exception of Green Globe, Blue Flag and ISO) have targeted small operations or ecolodges rather than larger scale tourism accommodations.

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[19] Organised by the Rainforest Alliance www.rainforest-alliance.org/certification/index.html
[20] Toth, 2000
[21] Font, 2003
[22] Font, 2003 & interview

Standards can be divided into *product* standards (reflecting the appropriate characteristics a product is expected to have) or *process* standards (reflecting the appropriate characteristics from products to final distribution).

Larger tourism operators, mainly hotels, have few connections with smaller certification schemes and opt instead for international standards such as ISO 9001 which provides a quality assurance accreditation or ISO 14001 which provides environmental accreditation. These schemes are not widely adopted, however, due to a lack of awareness and marketing and many larger chains having their own internal monitoring or benchmarking systems.

4.2   Benefits and Issues

The benefits of certification are seen to be wide-spread although the majority of programs uphold marketing and training as their primary benefits.

With the designation of a logo, certification is thought to give companies a competitive advantage and increased linkages into the distribution chain and to consumers through marketing (inclusions on web sites, travel fairs, brochure recognition), all of which would be assumed to give businesses competitiveness. Additional benefits perceived from certification include:

- The ability to distinguish sustainable tourism from 'greenwashing'
- The encouragement of voluntary improvements
- Showcasing best practices
- The use of the standard as a blueprint for future development
- Training of management procedures
- Cost savings
- Peer recognition
- Achievement beyond legislation compliance

Determinants of success of schemes have been linked to marketing which to date, has been largely unsatisfactory with the exception of some ECEAT schemes (see Box 4) due to the small number of certified products and therefore reduced appeal to large operators to use them in their product choice. Also, the sheer number of schemes and labels makes it difficult for tour operators to incorporate them as they would have to educate the consumer about the standards behind each one and differences among them. This is beyond what tour operators deem practical for hard copy brochures.

Larger certified operators (through organisations such as Green Globe or ISO) have seen cost savings and overall improved management structures. Some benefits to the community are improved environmental conditions of facilities or infrastructure improvements such as new access roads (although often larger hotel chains build water or sewage plants only for the hotel complex rather than the community or village at large). As most certification schemes do not include labour or social/community issues, the local community has not greatly benefited. In addition, companies have not generally seen marketing benefits, and therefore have participated in schemes largely for cost savings or reporting purposes.

Box 4 – ECEAT in Eastern Europe – Access to new Markets
Ecolabels in Eastern Europe were developed to promote organic farms and rural accommodation and promote them to the increasing number of tourists visiting these regions. The Czech Republic's scheme has seen 135 accommodations certified which have been promoted through publications of the Countryside Holiday Guidebook and or ´the Heritage Trails. As many visitors to Eastern European countries have been VFR (visiting friends and relatives) or independent tourists, farm stays and rural accommodation was a unique and relatively new type of tourism which has since led to the growth of agro-tourism in Europe.
The newest initiative is the new "national ecolabel for tourist services" which has been accepted by the Czech Government three weeks ago and will be used as a tool for the new governmental "Tourism Policy" since 2007 (because of the EU programming period 2007-2013).

Issues/failures of certification schemes

Issues around certification are widespread and varied. As Font (2003) suggests, the majority of certification schemes for tour operators address ecotourism operations rather than large mass market operators who supply the majority of the world's tourism and have the main access to the market[23]. Therefore it has not helped respond to industry pressure as most operators have not heard of the numerous schemes or choose their product based on price. Additionally, there is a lack of critical mass as less than 1% of tourism businesses are certified. Thus, tour operators do not have enough products to choose from and often schemes do not ensure quality standards in their accreditation.

Issues include:

- Lack of critical mass (too few certified products, certification is not wide-spread)
- Too many certification programs and other industry awards have led to confusion
- Lack of awareness by industry, consumers and government
- Lack of unified brand (too many programs compete against each other, duplicate efforts, yet vary in their criteria)
- Low consumer demand and a general tiredness with labels of all kinds
- Lack of credibility (local certification schemes with no international recognition)
- Lack of proven marketing benefits (and lack of marketing by certification bodies)
- Lack of incentives for hotels or businesses to join
- Lack of readiness to disclose information (Businesses do not wish to disclose information to obtain certification)
- Cost of adherence (e.g., Green Globe, ISO) and perception that recognition/label can be 'bought'

4.3 Types of and Participation in Schemes

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[23] Font, 2003

The most successful certification program to date has been Blue Flag, an internationally recognised program for measuring the health of beaches. Over 2,700 beaches have been certified. Success can be linked to health and safety as tourists do not want to bathe on polluted beaches. As noted earlier, beach health and cleanliness is a motivating factor in choosing a holiday therefore, having an internationally known system that assures beach health is an economic incentive for a hotel owner near a beach. The Blue Flag program greatly reduces the cost of evaluation by using existing infrastructure to take measurements of the environment.

Overall, certification within the tourism industry has been difficult to achieve because tourism is multifaceted and includes a mix of services and products. Most certification and supplier development is voluntary (between 10-25% of suppliers have met the voluntary sustainability related standards), but there is little consensus that certification is actually viable. There are also few accommodations or organisations that have been certified. In Europe, where the most ecolabel or certification programs exist, less than 0.5% of accommodations have been certified. The four best known certification programs for ecotourism and SMEs (ECOTEL, CST, NEAP and Green Globe) have less than 2000 members in total. In Costa Rica only 5% of hotels have been certified, with only 46% of them advertising their certification[24].

It has been suggested by the new InterAmerican Bank MIF project for a Sustainable Tourism Certification System that certification for sustainability of tourism will increase competitiveness and market access of small and medium sized enterprises in Latin America. The EU has funded the VISIT scheme and the Green Travel Market to promote certified products and the Cooperative Research Centre for Sustainable Tourism (CRC) in Australia has partnered with Green Globe. However, a thorough review of existing reports on this topic shows that there are no market demand studies available to support this assumption[25].

Many programs also focus specifically on eco-lodges or other small scale accommodation, such as agro-tourism accommodations. Although this form of tourism can bring positive benefits to the areas in which it operates, its very nature does not make it suitable for mass tourism operators who control the vast majority of travel.

There is also a lack of awareness among businesses, although the GTBS in Scotland affirmed that they had good take-up over the first three years, and that their membership is now increasing by about 30% per annum. In Costa Rica, initial participation in the program was also high, however, to date there are few hotels that have achieved a full five star rating. The CST stated that the department was receiving approximately 300 requests for certification per year before the 'oath of legality' (must be notorized by a Public Notary) was put into place. Now they are only receiving 10 requests per year[26].

There is also a lack of awareness among consumers. In Christchurch, New Zealand, interviews with 295 visitors found that only one-fifth recalled any place with ecolabels, and only 13% had ever heard of any tourism ecolabel[27]. In a survey of 100 tourists in

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24 Newton et al, 2004
25 Interview with Megan Epler-Wood
26 Newton et al, 2004
27 Fairweather, et al., 2005

Australia, not one of them chose his or her hotel based on Eco-Australia certification[28]. It is estimated that less than 1% of consumers were aware of the existence or criteria of any tourism certification program (for consistency)[29].

Some certification programs assessed did not claim to attract increased business but focused instead on improving management procedures and reduce cost savings. The GTBS said applicants have higher occupancy rates than average for Scotland. This, however, must be accepted with caution as these applicants tend to be well managed companies who would likely achieve these results even without certification.[30] In Guatemala, companies gain more through management techniques to reduce costs and improve efficiency than they do through marketing. There are also problems with transparency as some businesses in Guatemala do not want to disclose their practices in order to obtain an ecolabel.

Certification cannot be seen to counter the problem of 'greenwashing' as schemes are mainly small scale and there is not enough industry pressure to make a difference. There is no world-wide method of monitoring certification and therefore overall compliance and improvement is hard to gauge.

4.4 Roles & Costs

Approximately 60% of certification programs are led by private tourism organisations or NGO's; the remainder are government led. The investment for the development of eco-labels differs from the maintenance of the programs. Development of programs is almost evenly split between NGO's, public and private sector (1/3 each, respectively), whereas almost 2/3 of programs are engaged in a multi-stakeholder collaborative approach regarding decision-making and advice giving[31].

The costs of developing certification programs are often put upon governments, however, large governance structures are pricey and programs may need a further layer of organisations to help industry implement the standards[32]. There is a high cost for SME's to apply for certification unless it is subsidised by government (application procedure and operation of program), and it is often not the priority of the government to run these schemes. Past studies showed that examples from Fiji, Dominican Republic and Venezuela failed in their early attempts to set up programs[33]. NGO's are not able to afford the start-up costs of wide-scale certification projects and are therefore either government subsidised or address specific areas (e.g. Ecuador's Smart Voyager program in the Galapagos, PAN Parks in Europe, Kenya lodge accreditation).

Unless subsidised, not all firms will have the same potential access to become certified. Most programs have addressed these issues through scaled fee structures which are linked to overall company turnover or number of staff.

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[28] Planeta, 2004 www.planeta.com/ecotravel/tour/certsummary.html
[29] WWF, 2000
[30] Font and Buckley, 2001
[31] UNEP, 2005, Font, 2003 and appendix D & E
[32] Font interview 2005 and 2002
[33] Maccarrone-Eaglen and Font, 2002

In Costa Rica, the government has successfully subsidised first time applications to the CST. In Australia, costs are kept low but this then impacts the amount of marketing possible. Green Globe, as an industry run program, has higher costs and is linked to the stage of certification. While some certification programs can provide sufficient benefits, cost is an issue for both the company (who may find it costly to implement criteria to become certified) and the program itself as it needs to run its operations and audit the companies applying. Some companies find ways to repay the fees as they find that meeting some of the criteria make them more eco-efficient and therefore they can justify further certification costs based on the savings realised. For smaller companies, certification programs might need to consider encouraging applications from co-operatives of small firms or under a destination umbrella. Costs are seen by many businesses as high due to the time needed for site visits and filling out forms and questionnaires.

Certification can help reduce operating and management costs, although it should be noted that not all adherences to social criteria reduce cost. Research has shown that substantial energy, waste and water savings can be realised by implementing sustainability criteria into operating processes and procedures. Credible environmental tourism certification programs, with respected standards and rigorous criteria, should be careful in considering broadening their approach to include social issues. 'A tokenist introduction of social issues might instead lead to criticisms for being environmental programs under a sustainability label'[34], and could also raise costs and expertise needed to administer them. It is generally quite difficult to measure social/community impacts through certification. For example, the International Hotel Environmental Initiative (IHEI) benchmarkhotel.com tool has been very hesitant to include social criteria as these are seen as hard to measure and difficult for hotels to implement since social aspects vary greatly from location to location, nor can criteria be applied consistently (socio-economic sustainability differs greatly from an ecolodge to a major resort hotel).

If certification is to continue to move forward, sustainability criteria need to be assessed alongside health and safety standards as quality assurance is critical to selling a better product. Although eco-certification claims to address environmental and sometimes social criteria, basic health and safety factors are not always considered and some certified ecolodges in Central America have been found to lack basic hygiene and safety. Although ISO 9000 addresses quality assurance, it is not linked to other schemes and has only been adopted by some hotels rather than entire chains or others in the tourism sector. The main selection criteria for customers to choose their travel packages remain price, safety and quality. Environmental and social criteria will only be considered when these primary criteria are satisfied.

4.5   Stakeholder roles and involvement

Government
Government roles have mainly involved providing an institutional framework as well as grants or loans. An advantage of government led schemes is that they are usually longer term in focus. Promotion of best practices has also taken place and there is an expectation

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[34] Font, 2002

that governments will take a more active role. Through the assessment of schemes, however, there is no evidence to support that governments are effective at marketing such schemes and often there is a lack of willingness to share information or cooperate with other schemes. There are few motivations for governments to be involved in certification. There is no market potential as the number of consumers actively supportive is minimal, and most often governments have adopted schemes as part of their wider development strategy (e.g., Costa Rica's Chamber of Commerce (CANATUR) was instrumental in setting up the scheme but has had no part in marketing it).

From previous research on the subject and discussions with existing certification programs, it has been suggested that international governmental bodies need to play a more active role. One is a cooperative arrangement with the WTO, and the other a more integrated relationship. An International Sustainable Tourism Commission (ISTC) – an autonomous body functioning as an executing agency of the WTO – has been proposed. There is no evidence, however, to suggest that there would be an increase in certification if this were to be the case as many countries who already offer programs do not want to give up their brand and there is currently a lack of global criteria used in certification.

NGOs
NGO's have also been responsible for running some certification programs, however the high costs of operations questions the feasibility and long term sustainability of this option. The role of NGO's has been to raise awareness and apply legislative pressure. As certification schemes need large upfront and ongoing investments, subsidies are required, and often NGOs partner with industry associations to implement programs.

Politically active NGOs are also exerting pressure, particularly on public companies, to take more of a leadership role with respect to CSR.

Industry
There are some industry schemes such as Green Globe, ECOTEL, ISO and CERES. Industry also plays a role in operating schemes such as Guatemala's Alianza Verde (Green Deal). Positive aspects of independent certification are that programs are self-sufficient and would not be relying upon government support. Industry- led schemes are also more willing to share information and partner with other certification schemes to move towards a wider brand and reduce costs for themselves and operators.

Future Involvement
Certification incentives could help build industry buy-in. Interviews with tour operators and existing research suggests that tax write-offs, preferential access to areas (e.g., beach property or remote parks) and preferential marketing for supporting schemes would be beneficial, however, the majority of businesses use certification as a means of cost savings, improving management practices and to comply with the requirements for corporate reporting (see Box 5). The main weakness of certification is the overall lack of reporting and monitoring. Certification has been seen to positively affect resource management but does not necessarily deal with labour or social issues and therefore most companies who promote their certification also provide additional forms of reporting. Certification also has mainly addressed small companies rather than larger operators,

accommodation providers and other service providers who make up the majority of the market.

Box 5 - Spier, Stellenbosch-Winelands, South Africa
The Spier estate comprises a 155- room hotel, conference facilities, golf course and winery. Their triple bottom line approach to sustainability has the vision to create a sustainable "micro-ecology" which enhances heritage and culture, generates wealth for all stakeholders, helps meet social and economic needs, and provides the infrastructure to encourage new community lifestyles compatible with the vision for the Winelands. Over 150 indicators measure aspects from compliance with employee regulations, energy and water usage, to the impact of the HIV/AIDS prevention and treatment initiatives. Some of the ways that Spier has contributed to CSR initiatives include:
- Procurement of natural gas from local, black owned business
- The establishment of a crafts market on the estate where individuals sell their craftwork
- obtaining the S.A. Fair Trademark (FTSSA)
- reduced wastewater by 20%
- created 19% new employment abiding by laws of equal opportunity
- given 65 hectares of land and water to 16 small farmers from historically disadvantaged backgrounds (as part of a wider land-reform program)
www.spier.co.za

To advance certification schemes a number of options have been put forward by NGO's, industry and government. The WTO guidelines call for higher government intervention to move sustainable tourism forward. National and regional certification schemes declare there is a need for higher government intervention through the establishment of a global set of criteria, promotion and monitoring. They have also noted that a joined-up government approaches to policy development in destinations (participation from both government and industry associations) is needed to help promote certification and that the overall supply chain needs to be focused upon. Interviewees have been suggesting that overall awareness and one overarching standard is needed if certification is to continue but that financial incentives, verification procedures and mandatory reporting are the most effective means to ensure participation and compliance. Since larger brands and companies dominate the sector, they can have more influence than small scale, bottom-up, locally based initiatives in the adoption of sustainability criteria and reporting.

Currently it is the NGOs, politicians and the financial market which are pushing for sustainability measures to be incorporated. Publicly traded companies, in particular, are being forced into compliance since financial analysts want to avoid risks at all costs; these companies are benchmarked against other global players such as Cendant, Marriott, Hilton, Carnival Cruises, etc., and CSR is therefore seen as key for their investor relations. However, the majority of the certification initiatives within the tourism sector to date have focused on the small scale voluntary initiatives that are not facing pressure to conform.

Operators within the supply chain that report their compliance are in many ways better monitored than if they were certified. TUI, in particular is very strong about tracking and demonstrating continual improvement, and assisting their suppliers through expertise in achieving these improvements. Accor, an international hotel chain also monitors through its purchasing organisations in each country (see box 6).

Box 6 – Accor Sustainable Purchasing
In 2002, Accor's purchasing department developed a Sustainable Development
Purchasing Charter which aimed to promote and monitor good labour and environmental
practices in the 15 countries where it has a purchasing organisation. In 2003 the charter
was sent to Accor's 2,000 preferred suppliers (the group's total spend is more than 1
billion Euros) who were asked to complete a questionnaire in order for the company to
monitor supplier compliance.
In 2003, Accor also set out a new Subcontracting Charter that clearly defines working
conditions for outside cleaning personnel in hotels managed directly by Accor, covering
areas from work schedules to training programs and the calculation of hours paid.
www.accor.com/gb/groupe/dev_durable/achats.asp

5 Codes of Conduct & Roles of Reporting

Codes of conduct were first developed in the 1970/80's and were predominantly focused
on visitor management and environmental management. Their aim was to raise awareness
in industry. There are a number of these codes within the tourism industry, put out by
international bodies (WTO, UN, TOI, TIES, etc.), however, there is not industry wide
awareness nor is there any monitoring of compliance. The tourism industry is fragmented
and difficult to monitor due to the complexity of stakeholders in the value-chain. Codes
of conduct tend to be voluntary or informal and vary considerably from sector to sector
(hotel, cruise, airline, and operator) and in what they cover (labour, environment, social,
economic) (see appendix B & C). There are two types of codes of conduct. One is put out
by organisations such as the WTO or industry associations and the latter are self-imposed
guideline of what the corporation deems ethical business behaviour and it's done to
reassure investors and consumers.

This research supports a recent World Bank Group report[35] that there is virtually no
effective monitoring or implementation mechanism yet in place for CSR practices, and
that even defining sustainable tourism can be difficult as criteria are interpreted
differently by different stakeholders. There are, however, a growing number of guidelines
and charters on sustainable tourism which have been put forth by both government and
industry.

5.1 Codes of Conduct - Roles & Participation

Government
Governments have endorsed the concept of sustainable tourism and signed on to multiple
charters, such as the Lanzarote Charter for Sustainable Tourism in 1995 or the EU's
'Working Together for the Future of European Tourism'. However, few charters or
country codes actually outline specific measurable targets, as most tourism policies have
been driven by economics and divorced from environmental and social costs. There has
been raised awareness by destinations in mature stages of development that conservation
and social issues could be a challenge as many communities were economically
dependant on tourism. There has also been an increase in the adoption of Local Agenda

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[35] Word Bank/ IFC (2003)

21 principles for destination management in the past few years[36]. Currently no government body has regulated the need for reporting in the tourism sector.

NGO's

NGO roles have been mainly to put pressure on development agencies and governments to address issues of sustainability, to put pressure on supply chain and distribution channels to change methods of procurement and to develop codes of conduct such as Conservation International's Marine Recreation Guidelines for water sport supplier procurement or the International Tourism Partnership's Siting and Design Guidelines for new hotel construction. Tourism Concern has been a leader in the pressure applied for the inclusion of human rights and labour issues to improve working conditions in tourism destinations. Over recent years, NGO's have called for businesses and governments to report on their environmental and social practices to ensure transparency of operations but currently these are only in the form of advocacy. Many NGOs have launched campaigns for more responsible travel including responsibletravel.com's 'Had Enough?' campaign to demand that the 'Big Three' - Thomas Cook, Thomson Holidays and My Travel - and their subsidiaries, develop and publish responsible travel policies on their websites and brochures, and Tourism Concern's campaign 'Sun Sand Sea and Sweatshops' which calls for better labour conditions by hotels and tour operators.

Industry

Many individual operators are working toward incorporating sustainability into their products and almost ¾ of tour operators or travel industry associations interviewed (and niche adventure/nature specialty tour operators) had a responsible or sustainable tourism code or policy, although not all evaluated or monitored compliance (see appendix C for full details).

Currently, a number of large scale tour operators are developing sustainable supply-chain policies. European tour operators tend to be most active in this regard, possibly due to the initiatives by the Federation of Tour Operators (FTO) and the Association of Independent Tour Operators (AITO) and the fact that most of the larger ones are publicly traded companies. Although becoming popular, there is a lack of uniformity of codes in spite of the growing number of associations that are making charters or codes mandatory (see Box 7). Elsewhere in the world awareness is much lower.

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[36] Local Agenda 21 (LA21) is a type of framework used by destinations to implement tourism with sustainability principles. The LA21 concept was provided to local governments after being adopted at the 1992 Earth Summit in Rio. It aims to allow each community to set its own path towards sustainable development which is participatory and involves multiple stakeholders. LA21 can play a key role in ensuring the involvement of all stakeholders, by taking into account ecosystems, planning, urbanisation, transportation, agri- aqua culture, etc.

Box 7 - ANVR

The Netherlands Association of ANVR tour operators implemented a Product Oriented Environmental Management System as part of their Responsible Tourism Program. The program is obligatory for all of its 200 members. It includes an action package with steps tour operators need to take: internal management and involvement of staff, purchasing, and contract management for the provision of transport, accommodation excursions and entertainment in the destination.

The association believes that success factors for travel organisers depend on intact nature, clean beaches and authenticity of destinations.

The ANVR, a federation of 3 membership associations: Association Air and Business Travel Agents (VLZ), Association Travel Agents (VRA), Association Travel Organisers (VRO), is focused on outbound tourism.

www.anvr.nl

Committed tour operations showed interest in working with certified products even though this cannot always be communicated effectively to clients. Most companies have set their own standards rather than use certification labels as these do not exist in all destinations where tour operators work and there is not enough product that is certified to choose from[37]. Tour operators also feel that the number and variety of different schemes makes it very difficult to educate their customers or their staff.

The most successful initiatives which have helped spread more sustainable practices are those for supply chain management (see box 8 & 9). Through the development of association charters or standards such as TUI or the Accor Group, many SMEs worldwide could improve their access to market if they abide by these criteria and offer their services to these buyers (who will need to replace suppliers who are non-compliant if they are to uphold their commitment to their initiatives).

Box 8 - Hilton responsible business program

Hilton has adopted a new Standard for Business Partners and Suppliers which includes standards on child or forced labour, employee representation, health, safety and environmental management, discrimination, disciplinary practices and employee compensation and working hours.

www.hiltongroup.com

Hotel chains have been addressing their environmental concerns for some years. A number of them set up the International Hotel Environmental Initiative (see appendix B & C) in 1992 which focused on environmental improvements and is now starting to address social and community issues. Most of the larger hotel chains comply with environmental standards and have environmental policies and standards ranging from in-house benchmarking systems (Accor, Hilton Group, etc.) to environmental standards manuals (Rezidor, Starwood, Fairmont, etc.). Although not widespread in adoption, some hotels are now promoting when they achieve international certification such as ISO 9001 and 14001 (some Taj, TUI, ITC Hotels, Sol Melia, Baja Inn Hotels).

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[37] interviews and Font, Tapper and Kornilaki, (2004)

Some hotels have subscribed to local certification systems (such as Rezidor hotels in Scotland attaining the Green Tourism Business Scheme or Rezidor and Scandic hotels in Scandinavia receiving the Nordic Swan ecolabel), however they are few in numbers.

There are growing examples of hotel companies who have helped sustainability through backward linkages in lower income countries (see box 9), but to date hotels and large tour companies are not pressured into having to receive a social and/or environmental license to operate as most communities and developing destinations do not have awareness of tourism, let alone the negative issues which may surround it.

Box 9 – Orient Express and community linkages

Orient-Express inherited a large plot of land as part of the staff accommodation complex in Aguas Calientes, Peru. Orient Express employees who live within the hotel complex and local church workers have started growing their own vegetables which they sell back to the hotel, the Machu Picchu Sanctuary Lodge. In this area of Peru, the hotel had problems finding quality food items, especially vegetables, and now purchases these from their employees.

5.2 Reporting

Industry has historically suggested that it will respond to consumer demand for sustainable tourism and that this is where the demand must come from, however, there is evidence that increased CSR is the result of the increased pressure by NGOs, politicians and the financial market to monitor or evaluate codes of conduct or tourism policies which address sustainable or responsible tourism.

Reporting comes from constant need for ongoing-communication with suppliers. A notable organisation that is driving progress in this area is the Global Reporting Initiative (GRI), which aims to 'raise the level of sustainability reporting to that of financial reporting'. The Tour Operators' Initiative, in cooperation with the GRI, developed a Sector Supplement to the GRI 2002 Sustainability Reporting Guidelines providing Tour Operators' performance indicators. Forty-seven indicators were developed to measure tour operators' performance in addressing the environmental, economic and social impacts of their business operations. The tour operators' supplement adds to, but does not replace, the 2002 GRI Sustainability Reporting Guidelines' section on performance indicators. The supplement was not designed to capture sector-specific aspects of the various service industries associated with a package, such as transport, accommodation, and other tourism services.

Many companies produce reports that are aimed at their own employees, in order to help explain and support the roll-out of a company's new sustainability policy. Some companies also report for reasons of reputation; such companies are keen to capture their leadership work and/or combat negative perceptions that may have arisen about their sector or brand. A social report can also be a useful communication tool to highlight responsible business practice across a company's worldwide operations. Publicly traded companies need to report on CSR initiatives as part of their investor relations and to demonstrate that they are proactive in reducing potential risks. Thus, larger hotel chains,

for instance, have moved significantly towards CSR reporting and have been included in the Dow Jones Sustainability Indicator and FTSE4GOOD index (Accor, Hilton and Intercontinental).

Industry association-led initiatives include the Tour Operators Initiative (TOI) and the IHEI. Both these organisations do not have a specific code of conduct but rather coordinate efforts of tour operators or hotels, respectively, to harmonise performance indicators, monitoring, reporting and tools to assist supply chain partners (see TourLink, Box 10).

Box 10 - TourLink: an initiative of FTO, VISIT and the EU.

The three-year programme aims to standardise sustainability checklists with those of certification programs. The project's goal is to merge/assimilate criteria of the FTO with VISIT (VISIT covers mostly environmental criteria, whereas the FTO includes social and labour issues). The aim is to achieve transparency, a cost-effective distribution system, and to link different supply chain initiatives to provide a common toolkit for travel providers.
www.fto.co.uk,

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6 CSR and Low Income Countries – Recommendations

It must be recognised that without political stability, security and basic infrastructure, tourism will not be fostered by any of the larger international companies, as risks to customers would be deemed too large, and therefore CSR cannot be considered in largely non-democratic countries.

6.1   Certification conclusions

Certification has resulted from confusion over terms in tourism such as 'sensitive, green, and eco', and the desire to legitimise them has led to multiple schemes being developed worldwide. While certification schemes may be described as ways for SMEs in lower income countries to obtain access to market, interviews with both major and specialist tour operators, travel providers and certification programs do not support this view. Most of the certification schemes have only certified small numbers of attractions or businesses and have not linked into the wider distribution channels due to low awareness and lack of critical mass. In addition, the majority of certification schemes address ecotourism operations rather than large mass market operators who supply the majority of the world's tourism and have the main access to the market. There also remains considerable variety in standards, criteria and indicators in certification usage. From this study it can be ascertained that although Costa Rica and other countries have widely known and recognised schemes, they are not able to keep up due to lack of staff and finances for operation. Voluntary standards have not been found to increase access to trade unless governments have assisted with mandatory legislation or trade access structures. Industry is cynical about government taking responsibility for the implementation of sustainable tourism practices and also that investment into better social and environmental

performance will increase access to market. There are a lack of internationally accepted principles for certification criteria (although programs such as VISIT and the Network of the Americas are a partial attempt to overcome this) and there is currently a lack of critical mass of products.

Certification was also found to be unsuccessful in allowing greater access to new market segments with the exception of some Eastern European countries who noted that organic farms and rural based accommodations gained an increasing number of tourists (providing they were in accessible locations with other amenities/attractions nearby). The lack of awareness about certification programs and the low incentive for international operators or larger players to take part are largely to blame. Certification schemes at their very best will only allow access to niche market segments, unless they become more widespread and focus on more than just ecotourism and small scale ventures. Operators and certification programmes and research studies have suggested that a global brand is needed if certification is to be pursued more seriously. One brand would help certification to be internationally recognised and also comply with generally accepted international criteria, and thus have a stronger chance of brand recognition in industry. However, no single approach has so far been put forward successfully due to the varying degrees of infrastructure in countries and the lack of sufficient markets to attract certifiable product.

If certification is to be moved forward, there is a need to link certification with *quality*. "Case after case has demonstrated that consumer demand develops long after a certification program is well established," according to Amos Bien of The International Ecotourism Society (TIES). The recent report on ecotourism certification suggests that consumer demand takes between 8-15 years (sometimes as long as 20) to develop and that quality, safety and price must be satisfied before the consumer will consider other factors[38]. There is also a need to create demand for sustainable tourism among the travelling public through the linkage with existing quality standards. One example where quality has been linked to certification programs is Green Globe, which has partnered with Australia's AAA to award *green stars* to products, thereby using an existing quality standard to promote eco friendliness. Their advertising notes research that suggest 62% of travellers say that endorsement will encourage them to consider one accommodation over the other[39]. Although ISO 9001 is a quality standard it is not linked with other certification standards. In addition, the education of governments about the benefits of long-term planning to ensure sustainability of the destination will also provide them with the skills to understand that long-term planning can ensure a more quality rather than quantity focused approach.

Most industry players noted they would be willing to abide by a national level certification scheme as long as it was transparent, did not raise costs of product and achieved a critical mass of certified products. In order to achieve effective certification schemes or guidelines in low income countries, a multi-stakeholder participatory approach was suggested that included international organisations, such as tour operators or industry associations, to represent individual companies and contribute to the development/adoption of schemes. Recommendations also included that there needs to be an assurance that Government engages with effective systems and builds proper partnerships and that there is a long-term commitment to the process. Industry is not

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[38] Bien, 2005

[39] www.aaatourism.com.au (2005)

willing to increase its costs unless it can be translated into increased profits or the cost can be transferred to the consumer. Incentives for gaining participation into schemes by larger operators who could push certification through their supply-chain were suggested, particular tax incentives, preferential access into natural areas and marketing incentives. It should be noted, however, that there are a number of issues within certification schemes themselves which need to be addressed before governments propose this on a wide scale to industry. For certification to advance it needs to be credible, demand driven, open and transparent, self supporting, accessible and link into a consensus of international standards.

Recommendations:
This report advocates that countries with more developed infrastructure are better placed to reduce negative effects of tourism than the development of certification schemes, and that adopting CSR and measures of reporting will have a greater positive effect on industry overall. In many low income countries there are problems of lack of tourism planning, established tourism ministries as well as clear roles and objectives. Therefore focusing on public-private partnership to forward the CSR agenda should have a greater overall positive impact and advance sustainable tourism in the industry. However, if certification is to continue, recommendations include:

- Rather than develop new certification schemes in each country, have governments endorse existing and internationally known standards, such as ISO 14001 and 9001 and ILO standards
- Continue with efforts to merge certification systems and provide for recognition or convergence of schemes to ensure wider participation and the inclusion of labour and community elements within certification and evaluation initiatives
- Create a more homogenous market and avoid overregulation in service sectors
- For elements which are not covered by international agencies (ISO etc.) develop or adopt one internationally recognised brand with baseline criteria to cut down on confusion and multiple criteria
- Focus on larger tourism companies and international brands operating in developing countries in addition to ecolodges and SMEs to promote wider scale adoption
- Promote existing industry codes of conduct or guidelines to ensure they are widely disseminated, implemented and monitored/evaluated
- Move towards mandatory certification and reporting (for national recognition of sustainable tourism, a critical mass must be achieved)
- Integrate quality assurance and health & safety standards into schemes or link with other programs (e.g. GTBS links to a quality assurance accreditation scheme)
- Focus on capacity building and awareness campaigns primarily to engage business-to-business marketing and government-to-business marketing and awareness.
- Ensure that local certification is implemented through a credible local or regional association to ensure participation and ease of access (but still linked to the overall global brand)
- Award achievement rather than commitment (to ensure confidence)
- Encourage individual business reporting which would improve awareness and obtain confidence in the credibility of certification initiatives

6.2 Recommendations for Achieving Sustainable Tourism and Access to Market for Low Income Countries

Supply Chain Initiatives

In order to enhance sustainable tourism development in low income countries, there is a need to focus on elements of the tourism industry which can affect a greater number of products and businesses and contribute environmentally, socially and economically to lower income countries.

SMEs as well as larger businesses in developing countries need to align themselves with European and North American buyers through abiding by CSR and sustainable tourism initiatives that are widely adopted (for example, TUI has made clear that they will not rely upon external auditors for checking accommodations in their programs; therefore businesses reporting on achievements will help link them to buyers who are looking for conformance). Restrictions or initiatives for more sustainable tourism may not come from low income countries as they are more than ever dependant on the free market economy. Restrictions must come from buyers in Northern Asia, Europe and North America (see box 6) and there need to be incentives for industry to apply supply chain CSR/sustainable tourism standards.

Supply chain initiatives can aid in creating more sustainable forms of tourism through:
- *Employment:* commitments from tourism companies to employ local people at fair wages and provide job training
- *Local economic linkages:* local procurement of food, supplies and services
- *Minimising negative cultural and environmental impacts:* through sustainable charters and codes adopted by large industries (such as abiding by international environmental and social regulations which may be ignored or not monitored in local destinations). Also through corporate reporting, education to consumers and businesses on traditional cultures and behaviour will be promoted
- *Participation in planning and decision-making processes:* through the procurement of local operators and services, community and local views will be fed back through the supply chain
- *Linking quality assurance and certification*: if buyers adopt criteria for their suppliers, suppliers may use certification programs to obtain the necessary training and knowledge to attain baseline or minimum standards

Recommendations:

- Encourage SMEs to focus their criteria to match those of international buyers so that they can align themselves with buyers who demand CSR criteria.
- Governments should increase pressure on industry associations to ensure supply-chain practices are publicly accessible
- Provide standards for reporting, including common terminology, disclosure of information, methods of evaluating performance, quality management systems and assessment of evaluation bodies

- Provide incentives for both small and larger tourism businesses to adopt supply chain sustainable tourism/CSR criteria. Incentives suggested include:
    - Rewarding good practice or suppliers that meet minimum standards set
    - Facilitating more business to business marketing – through distribution channels; instead of business to consumer marketing as this is not yet strong enough to influence the consumer
    - Promoting best practices that showcase that success needs to include Profit and Returns on Investment in order to build the business case for the industry
- Ensure low income countries incorporate tourism into their development policies and provide incentives for larger international companies to adopt certification measures and supply chain guidelines which will benefit SMEs and the local community.

Reporting

Business reporting on social and environmental issues has potentially helped increase loyalty and a sense of distinctiveness. Some businesses ascertain that promoting their responsible/sustainable business practices can give them a better market position by distinguishing and differentiating their approach.

Initiatives must be industry led as labour standards and other elements of sustainability are not visible to the consumer but crucial nonetheless to the long-term wellbeing of the destination. CSR reporting means a company is more transparent and accountable to external stakeholders, enabling investors to avoid risk and consumers to support more sustainable businesses, therefore having a multiplier effect. Reporting was deemed essential by the corporate interviewees to ensure that efforts are maintained, and initiatives continued. It also makes it possible for others in the supply chain and at destinations to duplicate successful practices.

Currently there is low brand loyalty as consumers make decisions primarily based on price; CSR initiatives could potentially lead to increased brand loyalty and product differentiation. As there is currently little consumer support or awareness, information databases need to be linked so that environmental and social criteria can be provided to the client when they are booking their holiday.

Recommendations:

- Governments should focus their capacity-building efforts on suppliers, using such methods as legislated compliance (e.g., environmental, reputation and business probity), ensuring that resources are available for training and learning by suppliers and, where needed, fill resource gaps
- Increase public-private partnerships of training for environmental and social awareness and mitigation strategies
- Offer incentives and reporting guidelines to the tourism sector distributed through industry associations. Support training and sharing of best practices
- Encourage industry associations to make adherence to sustainable or responsible tourism policies a condition of membership and to report on progress

- Encourage CSR reporting from tour operators, airlines, cruises, hotels and destinations themselves so that they can understand the impact they themselves are having. Reporting will also provide measurable criteria by which companies and destinations can be compared.

Providing for a Sustainable Industry

To ensure that a more sustainable form of tourism is pursued, there is a need for stricter legislation coupled with joined-up government. Both industry and certification bodies interviewed noted that a such an approach adopts a concerted effort using all the arms of government – central, regional and local government and public agencies, as well as the private and voluntary sectors to form private/public partnerships. Integration into wider sustainable development plans as well as destination management plans is imperative, and a bottom-up as well as a top-down policy approach is needed. Pressure on governments to incorporate tourism into their wider development policies may help raise awareness about the need for sustainable tourism and the benefits of long-term planning approaches, however there is a strong need for training of employees and industry players at the local level. Stricter legislation in low income and developing countries is often fraught with issues of corruption, lack of monitoring and lack of governance, as there are often neither tourism master plans that incorporate sustainable tourism practices or measures nor incentives for industry to adopt them on their own initiative. To date, few developing countries have imposed social or environmental criteria to foreign investors, seeing only short term economic gains instead of long-term, holistic, sustainable tourism development.

Recommendations:

- Ensure transparency through a multi-stakeholder process
- Include sustainable tourism in all levels of policy formulation from national tourism policy to local destination management plans
- Recognise the difference between local vs. international stakeholders and the incentives or encouragement they need to adopt more sustainable forms of tourism practices
- Ensure that tourism is seen as a core or pillar in countries' wider development plans and policies
- Ensure that development of tourism in low income countries includes education and training of local communities
- Provide for sustainability experts to be included in new tourism developments to ensure social and environmental criteria are considered in proposals and funding
- Ensure stakeholders are identified and consulted throughout the tourism development process and play an active role in decision-making
- Promote positive investment structures for integrated tourism master planning – focusing on risk mitigation through sustainable development and planning of tourism

7 Conclusion

Sustainable tourism can help overcome many of the negative impacts associated with tourism development. Based on the interviews conducted, it is clear that guidelines alone are not strong enough to overcome the short-term profit motive of many operators, governments and destinations. At the same time, national certification programs are too numerous, with too many varying criteria, and not enough accredited product to be effective at this point in time.

The analysis indicated that there are emerging trends and recommendations to be gained from this examination, however, it is not suggested that these codes or schemes are standardised within the tourism sector, nor is there a convergence of themes within them with the exception of the International Labour Organisation (ILO) and environmental criteria which often addresses similar issues of waste, water and energy management.

In summary, the conclusions of this report are fourfold. First, there is little overt demand for sustainable tourism therefore more research is needed to determine how product can be shifted to include sustainability. If the consumer and the industry are driven by price then there is a need to re-think the strategy of how to include sustainability within current cost structures. Second, there is low awareness and success of certification programs to date. There is a need to further develop the concept of an international certification label for the travel and tourism industry that is inclusive (environmental, social, cultural etc.), affordable, monitored, and reported. As there are already a number of recognised and internationally accepted schemes, these should be promoted to extend their reach rather than developing new schemes which add to the confusion of both the industry and the consumer. Third, in order to achieve more sustainable forms of tourism, it needs to move away from voluntary measures towards reporting where progress can be measured and buyers and suppliers held accountable for their actions. Fourth, CSR could help with a number of issues facing tourism with regard to promoting sustainable tourism practices, however, industry must see government involvement and support if they are to increase their own involvements in CSR. There is a need for governments to step up to the challenge of ensuring more sustainable forms of tourism will be supported and to reassure investors and players in the tourism sector that government will support and encourage sustainable tourism management and development.

Sustainable Tourism Diagnostic Checklist

The purpose of this checklist is to attempt to align CSR practices within the tourism industry and public sector development of tourism. It contains a series of criteria that strive for optimal roles for good business practices and development. It should be noted that different criteria will be different for each sector of the industry (for example airlines would not be operating tours or tour operators would not be gaining acquiring land). In addition, due to the nature of the tourism industry, many businesses within this sector may be too small to fulfil all criteria and this tool should be used as a guideline only.

A number of elements of this checklist are critical to ensure the development of a sustainable tourism industry. This does not mean that other elements are not important, however, the elements marked with an * are the minimum standards for which broad enforcement/compliance is desirable and realistic. It should be noted that different countries will have different laws and regulations, and that basic international standards as set out by ILO and other such organizations should be followed in due process.

Economic

General policies and planning
- Policies to accommodate cultural customs, traditions and practices of staff throughout the organisation*
- Disclosure of loans, monies and taxes from third parties*
- Policy to support voluntary eco-labels and certification where possible
- Public disclosure of health and safety policy for operations, staff, end-user and management in accordance with national and international laws*
- Annual environmental, social and economic report available in public domain*
- Policy and compliance of anti-corruption measures*

Management Systems
- Governance structure*
- Management systems*
- Corporate accountability and risk assurance committee
- Compliance with local laws and regulations*

Employee/HR principles
- Clear policy and guidelines on labour standards in accordance with local labour law *
- Established working hours and terms of overtime, sick leave*
- Abolishment of child labour, sexual discrimination, forced, bonded or compulsory labour*
- No tolerance of physical, psychological violence or verbal abuse*
- Recognition of right of employee to be represented by trade unions or other associations and recognition for negotiations on behalf of associations*
- Recognition and access for employee feedback and established mechanisms for grievances, redress, appeal
- Respect for human rights (including indigenous and tribal people)*
- Compliance with ILO conventions on child and forced labour*

- Recognise freedom of association; non-discrimination; programmes to combat sexual exploitation of children and to combat and mitigate the social impacts of HIV/AIDS; citizen participation in planning process*
- Provide evidence of recruiting local residents (including destination nationals) for destination posts including management positions (in accordance with local and international law)
- Preference to local employment (within legal constraints)
- Established wages consistent with national standard*
- Honoured reasonable employee benefits - Access to health care, dental, vacation pay, maternity rights, meals or food allowance, transportation allowance, travel, performance bonuses*
- On-the job training for skills and upgrading of skills
- Training for environmental and cultural sensitivity – both within community, corporate culture and to tourists*
- Fair redundancy, compensation and termination terms*

Note: Many labour standards should reflect compliance with ILO standards

Supply chain /procurement procedures
- Provision of purchasing of local food and equipment from local community
- Creation of networks of environmentally/socially responsible businesses within the destination area
- Use of locally sourced and produced materials, foods, etc. (within legal constraints)
- Describe processes through which suppliers, by type, are consulted during development and implementation of the supply chain management policy,
- Description and disclosure of supply chain policy and targets for social, environmental and economic measures
- Description of suppliers who have sustainability policies and implemented a sustainability management system and/or have a staff person with management responsibility for corporate sustainability.
- Adoption of fair competitive practices for procurement and service contracts*
- Provision of information on quality of products and quality standards
- Fair payment of contracts and service agreements within national legal standards*
- Applied health and safety practices in accordance with national and international laws for suppliers and purchasers*
- Promotion and public encouragement of environmentally and social practices within supply chain
- Published supply chain practices code
- Promotion of labour standards through supply chain

Environmental

Environmental Reporting/Management Systems
- Established policy and compliance with local and international environmental management, transport and hazardous waste principles*
- Established formal Environmental Management System (EMS) (performance based)
- Disclosure of improved EMS management, operations and organizational structures (attempt to integrate EIA into standard EMS)

- Annual environmental report
- Policy and timely disclosure of environmental reporting to shareholders and public stakeholders including:
- Assessment of significant risk of products, services and/or operations*
- Incorporation of risk assessment and mitigation*
- Conducted and application of environmental impact assessment (EIA) in all new building or construction in accordance to international and local laws*
- Conducted independent EIA to assess and avoid conflict for both environmental implications as well as social/community implications – obtain clear permission/license to progress from both environmental and social community*

Environmental management
- Incorporation of published standards for new siting and design for new construction, refurbishment and renovation of property
- Consultation with affected stakeholders regarding risk mitigation
- Disclosure of environmental risks to affected stakeholders within reasonable timeframe*
- Established effective procedures to address environmental damage to resources and risk mitigation plan to overcome hazards or deterioration*
- Environmental impact assessment checklist or guideline to assess adverse social impacts
- Support of conservation efforts
- Standard training of risk management, environmental awareness of products and services*
- Established tour size (tours or excursions group sizes for tours are kept to minimum size (under 16 passengers)
- Established tourist/resident ratio on peak days or season*
- Established standards for impacts for specialized tourism products/services (golf, diving, beaches, hiking, heritage sites, etc.) *
- Use of sustainable forms of tourism for touring or use of low emission gasoline
- Established measures to increase public access, visual and landscape impacts
- Assessment and measures for protection of local Flora y Fauna, wildlife, open spaces and forest, biodiversity, marine/eco/terrestrial habitats, water, air and noise*
- Establishment of Green areas and gardens
- Mitigation of visual and landscape impacts
- Established appropriate scale for design and building of tourist facilities/accommodation
- Use of appropriate building materials (aesthetically sensitive to area and renewable where possible)
- Environmental education to staff, management and consumers of risks and possible reduction of energy, water and waste

Water
- Efficient use of water*
- Reporting on usage of potable water
- Re-use of grey water
Energy
- Use of renewal energy sources*
- Reduced use where possible of energy intensive practices*
- Reporting on fuel usage cost, CO_2 emissions

- Usage of alternate and other energy sources, including solar, wind, geothermal, biomass, small-scale hydro energy, and methane based composting systems

Waste
- Compliance with national and international regulations of hazardous waste*
- Provision of consumption of annual waste
- Optimal use of Non-corrosive biodegradable chemicals / cleaning products*
- Recycled / eco-friendly products, Post-consumer recycled paper and products
- Established recycling program
- Reduction of non renewable resources where possible *

Pollution
- Assessment and mitigation of noise and air pollution
- Assessment and mitigation of air quality

Social

Guests
- Encouraging responsible use of alcohol
- Evidence of environmentally friendly materials for guest/client promotional materials
- Education to consumers about local traditions/cultures*
- Education of ecological and biodiversity to guests*
- Assurance that guests do not purchase products made from endangered species*
- Responsible advertising customer satisfaction and feedback
- Encourage customer engagement through
  - feedback systems
  - awareness and education means surrounding environmental and social issues and protection

Community engagement and benefit
- Training programs extended to local community
- Planning gains- infrastructure or public building (e.g. hospitals) that are donated through development
- Appropriate land acquisition *
- Accessibility for public and local community to beaches and attractions and special consideration given regarding local rates and membership*
- Established and accessible community feedback system for feedback and participation in new development*
- Disclosure to employees and community of health and safety risk as well as occupational hazards/diseases/health risks
- Established policy or guidelines for community engagement and non-commercial stakeholders (community groups, NGOs, non-shareholding government authorities, universities etc.)*
- Recognition and protection of the integrity of the community social structure*
- Recognition and respect for local tribal and indigenous groups*

Health and safety

- Accident and insurance prevention*
- Senior management accountability
- Regular training*
- Systems to respond to and prevent threats
- Clean bathroom, potable water and food storage
- Established house keeping standards
- Clear policies and guidelines established for health and safety measures including accidents and disease*
- Clear policies and guidelines developed for fair and equitable hiring/termination
- Clear policies and guidelines developed to address social issues (e.g. aids/HIV, etc in accordance with national standards) *
- Established effective management system for promoting health and safety*

Accessibility
- Accessibility measures for the handicapped
- Consideration of environmentally sound mean and modes of transport

Contribution to local development
- Evidence of changes in tour package or hotel operations to minimise negative environmental and social effects on local community
- Charitable donations to socio-cultural projects
- Charitable donations to environmental or conservation projects
- Contributions of annual hours of in kind / volunteer to local communities
- Describe measures taken to identify and offer commercial opportunities and assistance to non-contracted suppliers that support community development*
- Indicate total funds (in cash and estimated value of in-kind contributions) for conservation and social development projects.
- Describe programmes for philanthropic and charitable donations in relation to conservation and community development projects.
- Deployment of market research, distribution networks and retail channels to support community-based enterprises
- Provision of emergency assistance (e.g. for natural disasters)
- Rescue and protection of Historic-Cultural Patrimony

APPENDIX A - INTERVIEWS CONDUCTED

Saúl Antonio Blanco Sosa
Director Ejecutivo
Alianza Verde (management of Green Deal)

Guilia Carbone
Programme Officer - Sustainable Tourism
UNEP/TOI

Jeffrey Lipman
Founder, Green Globe
Tourism Advisor, WTO/UN

Dr. Wolf Michael Iwand
Executive Director, Corporate Environmental
Management
TUI AG

Tina Newton,
Visiting Professor
Center for Sustainable Development
(assessment of CST program)

Naut Kusters
Director of ECEAT- Programs, Tour Bench &
Green Tourism Marketing Scheme
European Centre for Eco and Agro Tourism

Xavier Font
Consultant and Principle Lecturer
Leeds Metropolitan University

Megan Epler Wood
Director (ex President, TIES)
Epler-Wood International

Jon Proctor
Director
Green Tourism Business Scheme, Scotland

Michal Burian
Chairman
ECEAT CZ

Richard Brodrecht
Director of E-Commerce
Thomas Cook AG

Kate Martin
Community and Environment Manager
International Tourism Partnership (and lead
brand IHEI)

Dr. Liz Freeline
Senior Research Fellow
Cooperative Research Centre (CRC)

Jamie Sweeting
Director, Travel and Leisure
Conservation International

Herbert Hamele
Director
Ecotrans/VISIT Initiative

Christine Francis,
Head of Legal & Consumer Affairs
Cosmos Holidays

Keith Richards
Head of Consumer Affairs
Association of British Travel Agents (ABTA)

Andreas Mueseler
Environmental Manager
LTU Touristik GmbH

Esteban Walters,
Business Development Manager
Opodo

Hope Burridge,
Marketing Representative - North America
Razdan Holidays

Jane Ashton,
Corporate Social Responsibility Manager
First Choice

Bruce Poon Tip,
President
Gap Adventures

Richard Gubler,
Delegate for Ecology
Kuoni Travel Ltd.

Christiane Théberge
Vice-president Public Affairs
Alliance of Canadian Travel Agents (ACTA)

Ruth Stanyard
Responsible Tourism Manager
My Travel

Suzanne Cook
Senior Vice President, Research
Travel Industry Association of America (TIA)

Chris Thompson
Responsible Tourism Director
Federation of Tour Operators (FTO)

Karl Kannstader
Director of Operations
Horizon Holidays & International tour leader

Daniel Chapman
Responsible Tourism Manager
TUI, UK

Fran Hughes
Responsible Tourism
Explore Worldwide

Guy Young,
President
The Travel Corporation

Roy Gaff
Past Chief Representative - China
Gullivers Travel

Gary Murtagh,
President
ElderTreks

Henrik Kjellberg
Expedia Hotels
- no program or work in this area

APPENDIX B - CODES OF CONDUCT - ASSOCIATION / NGO

Organisation Name	Code of Conduct/policy?	Human rights/ labour	Health /safety	Social / community	Environ-mental	Monitoring	Other programs linked to	website
AITO (Association of Independent Tour Operators)	Responsible tourism guidelines	No	No	Yes	Yes	no	International Centre for Responsible Tourism	www.aito.co.uk/
Conservation International	- Marine Recreation Guidelines - A Practical Guide to Good Practice: Managing Environmental and Social Issues in the Accommodations Sector	No	Yes	Yes	Yes	No	Piloting with hotels Supply Chain Management Tool	www.celb.org
Ecotourism Association of Australia	Code for operators	Some	Some	Yes	Yes	No		www.bigvolcano.com.au/ercentre/eaacode.htm
European Federation of Camping site Organisations	Environmental Management Charter For Caravan, Camping and Holiday Parks	No	Yes	Yes	Yes	?		www.campingeurope.com
Federation of Tour Operators	Statement of commitment.	Some	No	Yes	Yes	Want commit-ment within 12 months	ECEAT Travel Foundation Tourlink	www.fto.co.uk
Friends of Conservation	Travellers Code	No	No	Yes	Yes	No	Various tour operators	www.foc.co.uk
Green Tourism Association	Being a green tourist guidelines	No	No	Yes	Yes	No	Various attractions, tour operators and hotels	www.greentourism.ca
ICLEI Local Agenda 21	AGENDA 21 for the Travel & Tourism Industry Towards Environmentally Sustainable Development	Yes	Yes	Yes	Yes	Depends	UN Sustainable cities network	www.iclei.org/ICLEI/la21.htm
International Centre for Responsible Tourism	Cape Town Declaration	Yes	No	Yes	Yes	No	-	www.icrtourism.org/capetown.html
PATA/APEC	Code for Sustainable Tourism	Yes	No	Yes	Yes	No	-	www.pata.org/patasite/index.php?id=72
International Ecotourism Society	International Ecotourism Standards	No	No	Yes	Yes	No	Ecolodges	www.ecotourism.org.au/ies.asp

Organisation Name	Code of Conduct/policy?	Human rights/ labour	Health /safety	Social / community	Environ- mental	Monitoring	Other programs linked to	website
bbbInternational Hotel Environmental Initiative (lead brand of ITP)	Environmental Action Pack for Hotels Environmental Management for Hotels	No	Yes	No	Yes	Self evaluation	Hotel groups worldwide Conservation International WWF	www.ihei.org
International Tourism Partnership (ITP)	Siting and Design Guidelines for construction of new hotels	No	Yes	Yes	Yes	No	Piloting with hotels and tour operators	www.internationaltourismp artnership.org
Tourism Concern	Travellers Code	No	No	Yes	Yes	No	-	www.tourismconcern.org.u k/
Tour Operators Initiative (TOI)	Supply Chain Management Guides to Good practice (for the Accommodation and Marine Recreation Sectors) & Sustainability Reporting : performance indicators for tour operators	Yes	Yes	Yes	Yes	Yes	Tour operators	www.toinitiative.org/
Travel Industry Association of Canada & Parks Canada	Code of Ethics and Guidelines for Sustainable Tourism	No	No	Yes	Yes	No	Parks Canada Canadian Tourism Commission	www.tiac-aitc.ca/english/codeofethic s.asp
UN/WTO	International Year of Ecotourism Declaration	Yes	No	Yes	Yes	No	International Year of Ecotourism	www.world-tourism.org/sustainable/IY E/quebec/anglais/declarati on.html
World Tourism Organisation	Global Code of Ethics for Tourism	Yes	Yes	Yes	Yes	No	ECPAT	www.world-tourism.org
WWF	Guidelines for community based ecotourism development Code for responsible tourism Code for Mediterranean tourists	Some	Some	Yes	Yes	No	TUI	www.wwf.org
WTTC	Environmental Guidelines with ICLEI	No	?	Yes	Yes	No	ICLEI Industry worldwide	www.wttc.org

APPENDIX C - CODES OF CONDUCT - INDUSTRY

Company Name	Code of Conduct or policy	Human rights /labour	Health & safety	Social / community	Environ- mental	Monitoring /Training	Other programs linked to
Accor	Environmental Hotel Charter Sustainability Policy	Yes	Yes	Yes	Yes	Yes	ECPAT Dow-Jones Sustainability index
Adventure Company	Responsable tourism policy & travellers code	Yes	Yes	Yes	Yes	?	Water Aid Friends of Conservation Community visits Tourism Concern porter policy initiative Plan
Aurinkomatkat's - Suntours	Sustainable tourism policy	?	Yes	Yes	Yes	?	TOI
Audley Travel	Responsible Tourism Policy & Travellers code	Yes	?	Yes	Yes	Yes	Climate Care
Banyan Tree	Green imperative web site	No	Yes	Yes	Yes	Yes	Thalassaemia Testing for all Staff Laguna Child Care Centre Museum Shop
British Airways	CSR report Environmental Policy	Yes	Yes	Yes	Yes	Yes	BA Tourism for Tomorrow Awards (until 2004) Uk emissions trading scheme GRI ISO
Dragoman	Responsible Tourism policy	Yes	Yes	Yes	Yes	yes	Tourism Concern Local community projects
Discovery Initiative	Mission statement	?	Yes	Yes	Yes	?	Climate care WWF UK TOI Galapagos Conservation Trust Orangutan Foundation IRDNC in Namibia our Operators for Tigers supply chain initiative in India
ElderTreks	Sustainable Tourism policy	No	Yes	Yes	Yes	?	Community initiatives

Company Name	Code of Conduct or policy	Human rights /labour	Health & safety	Social / community	Environ- mental	Monitoring /Training	Other programs linked to
Exodus	Responsible Tourism Policy	No	No	Yes	Yes	Yes	TOI Travel Foundation Friends of Conservation
Explore	Responsible tourism policy	Yes	?	Yes	Yes	Yes	IATO Travel Foundation Tourism Concern Climate Care
First Choice Holidays PLC.	Corporate Governance Annual Report	?	Yes	Yes	Yes	Yes	Travel Foundation Tourism Concern Forum for the Future TOI ISO14001
Guerba	Porter Policy Commitment to sustainable tourism	Yes	Yes	Yes	Yes	Yes	Village education projects Aminikids.org Woodland Trust C-level carbon emissions
Hilton Group P.L.C.	CSR Report	Yes	Yes	Yes	Yes	Yes	FTSE4Good IHEI Hilton University Scandic in Society Hilton in the Community Foundation
Hotel Plan	Environmental Reports Eco plan	?	Yes	Yes	Yes	Yes	TOI Company Environmental Award
Intercontinental	Social responsibility guidelines (web)	Yes	?	Yes	Yes	yes	FTSE4Good IHEI Conserving for Tomorrow Habitat for Humanity UNICEF
Kuoni Group	Environmental policy own environmental label program for eco friendly hotel / management and for cruise ships	Some	Yes	No	Yes	Yes	ISO 14001 EMS Green Planet Award

Lindblad Expeditions	Commitment to Environment (web)	Some	No	No	Yes	?	Galapagos Conservation Fund RARE ISO 14001 WWF Marine Recreation Foundation

Company Name	Code of Conduct or policy	Human rights /labour	Health & safety	Social / community	Environ- mental	Monitoring /Training	Other programs linked to
LTU-Touristik GmbH	The environmentally friendly hotel brochure	?	?	Yes	Yes	Yesb	TOI ECPAT European Ecolables
Nature Trek	Responsible tourism mission	?	Yes	Yes	Yes	?	
Responsibletravel.com	Responsible tourism policy	No	No	Yes	Yes	?	Travel Foundation
Rezidor SAS	Responsible Business Report Dedicated Responsible Business section of website	Yes	Yes	Yes	Yes	Yes	IHEI European Ecolables UNESCO Save the Children
Royal Caribbean	Dedication to the environment-environmental policy	Some	Some	No	Yes	?	ISO Ocean Fund
TUI	Environmental reporting Certified Environmental Management Ecosense – forum for sustainable development	No	Yes	Yes	Yes	Yes	TOI ECPAT European Ecolables Federation of Tour Operators ICLEI IUCN ISO 14001 UNESCO WTTC
Virgin	Corporate and Social Responsibility Report of 2000/03	Some	Yes	Yes	Yes	Yes	Comic Relief Make a wish foundation Change for Children Young Enterprise scheme
Voyages Ilena	Responsible tourism web page and policy	?	?	Yes	Yes	Yes	AITO

APPENDIX D - COUNTRY CERTIFICATION SCHEMES

Country (ies)	Name of program	Program implemented?	Incentives for business to join?	Initiator	Human rights/ labour	Health and safety	Social / community	Environ-mental	Monitoring	# of properties certified
Australia	NEAP	Yes	Cost savings, marketing	NGO – Joint initiative of the Ecotourism Association of Australia and the Australian Tourism Operators Network Currently and funded by business	Some	unknown	Yes	Yes	Random audits	unknown
Brazil	Brazil Sustainable Tourism Certification Program (PCTS)	Yes	Marketing, cost savings, links to other initiatives	NGO - Instituto de Hospitalidade, supported by the Brazilian Export Promotion Agency and Multilateral Investment Fund of the (IADB).	No	Yes	Yes	Yes	Yes	200 properties joined
Costa Rica	CST (established 1996)	Yes	Inclusion on CST website, monetary incentive, cost savings, marketing, personnel training, and participation in various world tourism events	Government Costa Rican Tourism Institute (CTI) and the Costa Rican National Accreditation Commission (NAC)	Some	No	Yes	Yes	Every two years	50 (only 5% of total hotels are certified)
China	Green Hotels Program	Yes	Recognition plaque, marketing benefits	Ministry of Enterprise	No	No	No	Yes	?	unknown
Czech Republic	ECEAT Est. in	Yes	Marketing, exposure to new markets Through publication of the Countryside Holiday Guidebook and or ´the Heritage Trails	NGO but supported by the Ministry for Regional Development	No	No	Some reference	Yes	-	135
Ecuador	Programa Nacional de Certificación de Ecoturismo	Yes	Promoted by Enjoy Corp Marketing on website, trade fairs	NGO - Ecotourism Association of Ecuador, supported by ministry	Some	No	Yes	Yes	Unknown	Unknown, 13 pilot projects underway

Country (ies)	Name of program	Program implemented?	Incentives for business to join?	Initiator	Human rights/ labour	Health and safety	Social / community	Environ-mental	Monitoring	# of properties certified
	PRONEC Est. in 2002									
Estonia	Hiiumaa Green Label	Yes	Marketing, environmental training	Unknown	No	No	Some	Yes	?	7
Guatemala	Green Deal Established in 2000	Yes	Marketing, training, technical assistance, way to audit, cost savings	Industry based NGO Alianza Verde	Yes	No	Yes	Yes	Yes	21 (11 more diagnosed)
Latvia	Green Certificate	Yes	Yes	E.C. Life project and	No	some	Yes	Yes	Yes	50
Malta	Eco–Certification Scheme Developed in 2002/2003	Yes	Cost savings, training, marketing	Government, Tourism Malta - Product Planning & Development Directorate	No	No	Some	Yes	Yes	16
South Africa	Fair Trade in Tourism Developed in 2002	Yes	Award a logo Link with operators	NGO						?
Sub-Saharan Africa	Pilot in Ghana, Mauritius, Gambia, Kenya, Mozambique, Senegal & Seychelles	No	Marketing, cost saving	U.N. funded with cooperation of national governments *currently in development	No	Some	No	Yes	n/a	n/a
Scotland	Green Tourism Business Scheme Established 1998	Yes	Saving money, marketing and being part of a solution	Industry and government	No	Some	Yes	Yes	Yes	436 properties (not all 5* certified)

Other schemes include:
ECO-TIP - Database of tourism ecolabelling schemes in Europe
Criteria for Nature's Best - Sweden's ecotourism label
The Swedish Society for Nature Conservation, Sweden The Swedish Society for nature Conservation have developed environmental criteria for a number of consumer products including passenger transport
The Nordic Swan for hotels and youth hostels, Nordic countries.
Qualität Plus Kleinwalsertal certificate for accommodation, tourism suppliers, local providers
Blaue Schwalbe certificate for accommodation businesses, different countries in Europe
Green Key certificate for accommodation businesses in Denmark, Sweden, Greenland, Estonia, France
Steinbock Label certificate for hotels in Switzerland
Bett und Bike - Fahrradfreundliche Gastbetriebe certificate for accommodation businesses in Germany
Das Österreichische Umweltzeichen für Tourismusbetriebe
Bayerisches Umweltsiegel für das Gastgewerbe
Legambiente Turismo
Milieubarometer
Zaļais sertifikāts
EcoLabel Luxembourg
Hotel au Naturel
White Flag Awards
BioHotels
Estonia - The Natural Way
entreprise éco-dynamique

APPENDIX E - INDUSTRY CERTIFICATION SCHEMES

program	Program implemented	Program Initiator	Incentives for business/attractions to join?	Human rights /labour	Health and safety	Social / community	Environ-mental	Monitoring
Green Globe 21	Yes	Industry	Marketing through newsletter and website, conferences, training, cost savings	No	Some	Yes	Yes	Yes
ISO	Yes	Industry	Environmental compliance, training, cost saving	No	Some	No	Yes	Yes
ECEAT	Yes	NGO	Marketing, cost savings, recognition of organic farming	No	No	No	Yes	Yes
VISIT	Yes Est. in 2003	NGO/E.U.	Cost reduction, increased customer satisfaction, increased quality Green travel market VISIT Holiday Guide	No	No	Some	Yes	Different for each scheme
Blue Flag	Yes	Government Acueductos y Alcantar illados (AyA), a government-run water company	Health and safety for tourists, marketing, environmental legislation	No	Yes	No	Yes	Yes – every year
CERES Green Hotel Initiative	Yes	Industry	Meet environmental legislation, meet consumer demand	?	-	Some personnel issues	Yes	Yes
ECOTEL	Yes	HSV International Consultants	Marketing, environmental training and cost savings	No	-	Yes	Yes	Yes
Green Leaf	Yes	Industry		No	Some	Some	Yes	Yes

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