Evaluating Ecotourism Lodgings in The New Key to Costa Rica

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The New Key to Costa Rica

ABSTRACT
Since 1991, the co-authors of the popular guidebook, The New Key to Costa Rica, have been developing a rating system for ecotourism lodgings based on three factors: environmental protection, fostering local economic and social well-being, and preservation of local culture. They have conducted three versions of this survey, which have appeared in the 11th, 12th, and 13th editions of The New Key. This paper presents some of the issues they have confronted during five years of evaluating lodgings for their sustainability.

Many ecotourism lodgings are truly green. Their practices support local conservation efforts, cause minimal environmental impact, contribute to the health of the local economy, and promote traditional culture. Others, however, do very little of this, but try to take advantage of the ecotourism boom anyway. “Greenwashing” is common in an ecotourism mecca like Costa Rica. Even hotels and resorts that have been publicly denounced for damaging the environment use the concepts of ecotourism and nature in their advertising. Everyone involved in the field knows that many tourists want to spend their vacations, and their dollars, doing “ecotourism.”

THE MEASURE OF A HOTEL’S SUSTAINABILITY

In 1991, Beatrice Blake and researchers Ronnie Cummins and Rose Welch took a hard look at Costa Rica’s tourism boom. Tourism had the potential to preserve or destroy the environment and culture of this small, vulnerable country. As travel writers, they wanted their efforts to contribute to environmental conservation and to sustaining the local culture and economy. Since The New Key to Costa Rica had always aspired to accommodate conscientious travelers, they thought they might have something to offer in helping promote what they began calling “sustainable tourism.” The result was a travel book that measured a hotel’s “sustainability,” based on three factors: its impact on the environment, its support of the local economy, and its promotion of local cultures.

The New Key to Costa Rica has carried out three evaluations of lodgings. The 1992 (11th) edition of the book listed 24 hotels and lodges that were practicing sustainable tourism. The 1994 (12th) edition contained the results of a more in-depth survey that was undertaken by co-author Anne Becher with the collaboration of Jane Segleau Earle, who was then a Master’s degree candidate at a
Costa Rican university’s Ecotourism program. The third version of
the survey will be published in the 13th edition of *The New Key*.

At the 1996 ISTF Ecotourism Conference at Yale, Barry Roberts
of the Costa Rican Tourism Institute (ICT) announced that the ICT
will begin evaluating lodgings in the fall of 1996. He expressed inter-
est in basing the evaluation system, in part, on the survey of *The
New Key* and said that Costa Rica would encourage other countries
to do the same. He invited the survey’s authors to participate in the
planning and implementation of the Tourism Institute’s rating
system. Following are some of the issues the authors have con-
fronted during five years of evaluating lodgings for their
sustainability.

For hotels that are already practicing sustainable tourism, this
survey gives:
- Recognition and positive reinforcement
- A free marketing boost which will draw tourists to them
  and encourage their neighbors to adopt similar practices
- Networking and connection with resources

For those not practicing sustainable tourism, the survey provides:
- Education
- Connection with resources
- Incentives for adopting better environmental practices

The surveys are taken seriously. Many hotels are concerned that
not being on the list will negatively impact their business. They want
to do whatever they can to make it onto the next list. Hotel owners
will see that it is in their business interest to practice sustainable
tourism. The intention of evaluations is not to “punish” hotels that
do not meet sustainability with negative publicity. The list of all
lodgings surveyed in *The New Key* is confidential. Readers do not
know whether hotels that are not listed failed to meet criteria or
simply were not evaluated.

**WHICH HOTELS SHOULD BE EVALUATED?**

In Costa Rica, almost any non-urban hotel tries to bill itself as an
“eco” destination. The authors could not survey every one of these
hotels. The criteria for “ecotourism lodgings” was narrowed down
to hotels that either have their own nature reserve, take people to
natural areas (private or public), or use the concept of ecotourism in
their publicity. Later, this last item was judged not sufficient by itself
to make a hotel an ecotourism destination. One practice that would
save time in a survey effort would be to establish minimum criteria
for participating hotels. They would have to adequately treat sewage
and garbage, or use local producers when available. These criteria
could be checked out before or at the beginning of the visit, so time
is not lost in filling out the questionnaire when it is clear that the
hotel will not receive recognition. But if the goal of the survey is to
provide hotels with as much feedback as possible, the survey should
not adopt minimum criteria.

There are good reasons for evaluating all hotels, not just
cotourism destinations. Beach hotels are proliferating along Costa
Rica’s coastline, and hold enormous potential for contamination of
sewage systems, in particular, are not well-designed. City hotels can
make their own contributions to sustainable development, especially
in sociocultural and economic respects. Fishing lodges are grappling
with serious conservation issues surrounding depletion of marine
life, making them good candidates for this type of evaluation. These
types of hotels, and probably others as well, could be evaluated for
their sustainable practices, but questionnaires specific to each type
of hotel would have to be designed. An advantage of having a larger
entity like the ICT carry out this type of evaluation is that it would
have the resources to cover more types of hotels.

Figure 1 details the criteria in our survey and their hierarchy of
importance.

Scoring systems are perhaps the most technical aspect of the
survey. Environmental variables were about equal in weight to the
sum of the sociocultural and economic variables. Depending upon
the situation, this might change from country to country, or even
region to region. One aspect of scoring will change in the next edi-
tion of *The New Key*. In the first two editions, hotels were simply
recognized. From now on hotels will receive one, two, or three sun
symbols to differentiate between those meeting minimum require-
ments and those with truly outstanding efforts. Single-sun hotels
will have incentive to improve and get two or three suns.

**WHO SHOULD DO THE EVALUATING?**

If the evaluation is to be performed by an outside entity—a
certification program run by a non-governmental organization or
an independent company, i.e., a guidebook—local researchers should
be involved. They have greater knowledge of local conditions and
can help design appropriate questionnaires and methodologies.

Each country’s or region’s evaluation will be based on different
criteria, and the person’s delineating the criteria should have an
in-depth familiarity with the place. At the same time, they should do
research on work in other countries, in order to make their evalua-
tion consistent with others throughout the world. Local field assis-
tants, familiar with the culture and language, are usually the most
appropriate interviewers.
HIERARCHY OF IMPORTANCE OF VARIABLES

ENVIRONMENTAL VARIABLES

I. Trash  Sewage  Own Reserve  Protection of Resources  Participation in Conservation Project

II. Real Impact  # Persons  Erosion of Trails  Biodegradable Cleaning Products

     per Tour  Information for Wild Animals in Captivity  Employee Training on Environmental Topics

     Construction Materials  Visitors

III. Introduction of Water Impact

     Exotic Species  Conservation Studies

ECONOMIC VARIABLES

I. Origin of Origin/Residence of Owners

II. Local Contracts Purchases Sales of Off-season Lay-offs Incentives

Employee Handicrafts

III. Imports

SOCIOCULTURAL VARIABLES

I. Takes Action on Cultural Questions Participates in Community Organizations

II. Makes Donations (Financial, Resources, Time)

III. Identifies Positive and Negative Cultural Aspects
If guidebook authors do the survey, they might be resented by hotel owners whose places were not recognized. This is especially difficult for travel writers when hotels they like and praise in the text of a guidebook receive low scores on the evaluation. If the survey is administered by another organization, it is easier to separate "subjective" description in the guidebook from the evaluation's "objective" rating. What is inappropriate is when for-profit corporations offer a "green seal" of approval if a hotel "joins," i.e., buys membership.

Conceivably, evaluations can be carried out by local organizations. However, a challenge to the locally-driven approach would be to standardize efforts. Local tourism chambers or conservation groups would have to work together to come up with consistent criteria. If this is the path chosen for a country or region, there would no doubt have to be a supervisory organization (national tourism institute or NGO) with enough field staff to assist and advise local bodies undertaking the evaluations. Coordinating local survey efforts would be one way that the Costa Rican Tourism Institute could come up with a laudable country-wide evaluation.

**QUESTIONNAIRES**

The first survey was mailed or faxed to hotels where researchers had visited and had spoken at length with the owners and managers. Despite this initial contact, only 25 per cent of the hotels responded. Many of the responses reflected misunderstanding of the questions. Some of the non-response may be traced to the survey form itself, since it is not a familiar medium in Costa Rica. These problems led the authors to carry out the second survey in person. This encouraged a higher response rate, because the authors could explain the questions in detail and put the owner or manager at ease. The survey should be carried out by a very small team, to ensure consistency. This is a major strength of the survey, but also what makes it such a large project.

Those who have relevant input for this type of survey include the following: managers/owners, employees, tourists, and project neighbors—especially community leaders in development and environmental organizations. We spoke with owners/managers and community leaders, including National Park Service employees. Owners/managers answered the questions on the form (Appendix A), and community leaders were interviewed about hotels' involvement in local conservation efforts and community affairs.

The authors did not talk to employees. There was concern that employees would fear retribution from employers if negative information was divulged or if the hotel did not make the grade. We were also concerned about how to approach employees. Time being limited,
we could only speak to a few. If the manger/owner picked them we could be misled; if we chose them, we might miss important information. Although tourists were not approached for the survey, they are an important source of information. Tourists catch hotels “off guard.” They know how effective a hotel is—when it is not doing what it says it is doing—especially in guest education programs. The New Key included a form to be filled out by readers, so they could recommend hotels that seemed to be practicing sustainable tourism or report on practices of recognized hotels. We have received no more than ten responses. A more effective approach might be to provide the hotel with blank forms and envelopes addressed to us. But we would not know if the forms were made available to all guests or just offered to those who were likely to provide a positive response.

DISSEMINATING RESULTS AND FOLLOWING UP

At a ceremony coinciding with publication of The New Key to Costa Rica in 1994, certificates of recognition were given to all hotels on our list. Ex-president Rodrigo Carazo, whose Hotel Villablanca also happened to be recognized, made a speech, as did Bary Roberts of the Costa Rican Tourism Institute. The press was invited and given a list of all the hotels in our book, with a short explanation of their most “sustainable” practices. Both English-language newspapers in Costa Rica, and one other guidebook (without asking permission) printed our list of hotels. Again, wider dissemination of results gives the survey greater impact. Other means of dissemination could include:

• distributing the list, either for free or for a price, to tour operators;
• writing itineraries that include visits to these hotels and either organizing tours with a branch of the evaluation; organization or working with an interested tour operator;
• making a concerted effort to send journalists the final results.

After each survey, a letter is written to each hotel with praise for positive practices and suggestions for improvement. Follow up observations have revealed that some hotels have put certain of these suggestions into practice. A detailed report card could be substituted for the letters—sort of an annotated check list. This would offer more complete information and would be appropriate if a non-profit or governmental certification organization were doing the evaluation.
Depending upon the medium in which the survey results are published, the list might need to be updated annually or more often. We follow up our survey every two years, when *The New Key* is published. Hotels already on the list are revisited. New hotels are surveyed by questionnaire. Hotels that did not make a previous list are invited to be re-surveyed if they have made significant improvements. If a survey is published on-line or in some other similar medium, new hotels can be added as they are visited and evaluated. Currently the authors are deciding whether it is enough for a hotel to maintain its level of sustainability or if it should show some improvement. The move into the three-sun structure is one way of encouraging progress.

**FINANCING EVALUATIONS**

We do not ask for a fee from the hotels being evaluated and get only minimal support from the publisher. Financial restraints are making it more difficult to carry out the survey.

To finance future versions of the survey, Jane Segleau is at work on a directory listing the types of services, products and technologies that contribute to sustainable development. The directory will be sold to hotels and interested individuals. It responds to the information needs of many hotel owners/managers who have no idea where to purchase biodegradable soaps or solar energy systems. The directory may be financed by advertisements from the service providers. Finally, the National Tourism Chamber of Costa Rica has offered to help sell the directory. The results of the survey could be sold to other guidebooks, newspapers, and magazines.

There are several existing evaluation programs, but little or no coordination or communication between them. The ISTF Ecotourism Equation Conference at Yale was a great attempt to foster this type of interaction. Some evaluation programs are models of careful and conscientious efforts. Others use sloppy methodology or are fronts for money-making schemes and threaten the public image of the entire concept. If evaluators want their efforts to last beyond the current ecotourism boom, they need to coordinate their efforts. There should be an internationally recognized body that certifies evaluation and certification programs.
Appendix A

THE NEW KEY TO COSTA RICA SUSTAINABLE TOURISM SURVEY
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Name of Hotel
Address
Postal Address
Telephone/Fax
Name of Person Interviewed
Position at Hotel

Introduction: The objective of this interview is to find out in the most objective way possible about all the efforts being made in this business to practice a type of ecotourism based on sustainable development. Businesses which are making outstanding efforts to practice “sustainable tourism,” according to this survey, will be recognized in the next edition of The New Key to Costa Rica. This is a guide for the discussion, but the participants should feel free to mention anything they feel is important.

I. GENERAL DESCRIPTION OF PROJECT

1.1 Number of rooms_______Total capacity________

1.2 How much for double per night?______ Food included?___

1.3 Amenities in rooms/project:
   private/shared bath
   cold/heated/hot water
   ceiling/standing/wall fan; air-conditioning
   television
   phone
   pool
   others:

1.4 Which ecotourist attractions are nearby?
   area
   public protected area
   private reserve (own/neighbor’s)
   beach
   farm
   nearby town
   river/lake/ocean
   indigenous reserve
1.5 Tours: yes no
   Where:
   Maximum number of tourists:
   Type of guide:

II. ENVIRONMENTAL CONSERVATION

2.1 What type of environmental impact do you think this hotel had during construction? None___ some
degree___ a large impact___. Why?

2.2 What studies have been done before or during construction, or during operation? Why?

2.3 What materials were used in construction?
   area           material (including species, if wood)
   floor          
   posts/beams    
   walls          
   ceiling/roof   
   other

   Where were they obtained?

   If you used wood, did you find out if it was an endangered species?________

   If endangered species were used, were they replenished in any way?________

2.5 Do you participate in any private or community projects to conserve the environment? What are the
   accomplishments of these projects?

2.6 If you depend upon a protected area that is not your own property, how do you help protect it?

2.7 If you have your own reserve, describe it: Total area of property_____ Area of reserve_____ 
   (primary forest______ secondary forest_____ area in regeneration______
   other________________________)

2.8 If you have your own reserve, how is it managed? Management plan____ Monitoring plan______
   Carrying Capacity studies____ Leave it untouched____ Guard against hunters_____ 
   Explain:

2.9 How do you avoid erosion problems on trails?

2.10 How is sewage treated?
   Flows to body of water without treatment___ Outhouse___ Septic tank___ (what is done with
   sludge?___________________________ Less than 30 meters between leach fields and
   wells___) Treatment Ponds___ Treatment Plant___ Biodigestor____
2.11 How are grey waters treated? Flow to a body of water without treatment___ Filter into soil without treatment___ Septic Tank___ (Separated from sewage___ Same tank as sewage___)

2.12 What type of garbage disposal methods do you use?
organic  compost  bury  burn  recycle  reduction  reuse  animals  municipal  other
steel cans
aluminium
bottles
plastic
paper

2.13 Are biodegradable soaps used? yes  no

2.14 Do you have any systems to conserve water?
Average water consumption in high season according to bill _________

2.15 Do you do anything to conserve energy?
Average electricity consumption in high season according to bill _________
Style of architecture helps with energy conservation______ (light, natural ventilation, other_________________________)
No electricity used___
Use alternative sources of energy___ (solar, wind, hydroelectric mini-plants, firewood collected where?___________________)
Management implements some type of conservation (energy saving technology, energy-saving practices, employee training, request that tourists conserve _________________________)
No efforts made in this area____
Architectural style promotes over-use of energy
(How?_____________________________________

2.16 Are there any captive, caged animals on your grounds? (explain)

2.17 Do you offer any type of training for your employees on environmental topics?

2.18 What additional information is offered to tourists?
specialized guides___ Library with environmentally/culturally-oriented collection___
presentations/talks___ own publications ___

III. ECONOMY
3.1 Has this area traditionally benefited from tourism?
What benefit does your business offer the local economy?
3.2 Where do you buy: local community nearby city Central Valley imported
food
materials and supplies
furnishings
Comments:

3.3 Do you contract or send tourists to any local service? (indicate contract or send)
guides
tours
laundry
rental (horse, bicycle, other)
transportation (boat, car, etc.)
restaurant
others:
Comments:

3.4 Sales of Souvenirs yes no; Local artisans’ work ___100% ___+50% ___-50% ___none
send tourists to artisans___
Comments:

3.6 Owners:
Is the business a company w/partners___ family business___ community business___ 
association___ other:
Owners’ Names:
Where are they from originally? Current residence

3.7 Employees
Total number of employees_____
Where lived before working here

3.8 What incentives do you offer your employees?
Training___ (describe:___________________________________________________)
Stock in the business___ profit-sharing___ Opportunities for advancement in the company___ 
Solidarity organization___ Union___ Recognition and appreciation of good service___
(How?____________________) Other__________________________________________

3.9 Do you have to let people go during the low season? yes no How many?

3.10 What are your major marketing challenges?

3.11 Does the hotel promote sales of land to foreigners?

3.12 Are there special offers for Costa Rican tourists?
IV. SOCIOCULTURAL ASPECTS

4.1 What type of relations do you have with the local community?

4.2 Do you participate in local organizations? (Which ones? What do you do?)

4.3 Do you donate resources to local organizations? (Which ones? What resources? Why?)

4.4 What do you know about the history of this area?

4.5 What do you know about the organizations in this area?

4.6 What do you know about the customs and values of this area?

4.7 Do you support and strengthen local culture? (reinforcing positive aspects, combating negative aspects)

ANNE BECHER AND JANE SEGLEAU EARLE

Anne Becher received a B.A. in Latin American Studies from Carleton College in 1987 and an M.A. in Hispanic Linguistics from the University of Colorado-Boulder in 1992. She is co-author of *The New Key to Costa Rica*. When she moved to Costa Rica in 1993, she began to collaborate with JANE SEGLEAU EARLE, a Forestry Engineer (Instituto Tecnologico de Costa Rica) who had spent many years in field offices of the Forestry Department of the Ministry of Energy, Natural Resources and Mines, and has a Master's Degree in Ecotourism (Latin American University of Science and Technology ULACIT). Together they re-designed the sustainable tourism survey and took it to over 100 ecotourism-oriented lodgings throughout the country between March 1993 and February 1994. Their list of 45 lodgings deemed to be “Practicing Sustainable Tourism” was published in the 1994 (12th) edition of *The New Key*. They, along with Beatrice Blake, are currently at work on the next version of the survey, whose results will be published in the 1996 (13th) edition of the book.

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