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How does green travel influence and impact the tourism industry in the aviation, tour operators, and accommodation fields?

How trustworthy is the sustainability marketing of these companies?

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This thesis explores the tourism industry, the emergence of green travel, and the new marketing strategies developed by companies from the field studied: Aviation companies, accommodations providers, and travel agencies. The purpose of this research is to see how companies market themselves as sustainable and to what extent they can be trusted in this marketing. In order to achieve this goal, a thorough literature review and a series of six case studies, using descriptive and exploratory methodologies have been chosen. The companies studied are Finnair, Ryanair, Marriott International, Banyan Tree, Expedia Group, and Intrepid Travel. The results of this study show that, in their reports, all companies have sustainable goals and are working towards achieving them. However, a comparison of the goals by industry is made to compare the differences between a company marketing its sustainable efforts and a company with a different marketing strategy. Overall, this thesis contributes to having a better understanding of companies' marketed efforts towards sustainability and how they really are.

Keywords: green marketing, sustainable tourism, aviation, accommodation, travel agency

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Glossary

ACC	Advertising Code Committee.
ATAG	Air Transport Action Group. a coalition of organizations and companies in the aviation sector, reflecting in particular on the problems of sustainable development and developing solutions to overcome the capacity problems of this industry.
CSR	Corporate Social Responsibility. The consideration by companies, on a voluntary and sometimes legal basis, of environmental, social, economic and ethical issues in their activities.
EFT	Environmentally Friendly Tourists.
EU	European Union.
FEE	Foundation for Environmental Education. Non-governmental, non-profit organization promoting sustainable development through environmental education.
GSTC	Global Sustainable Tourism Council. Non-profit organization that sets and leads the baseline standards for sustainability in the travel and tourism industry globally.
ICRT	International Centre for Responsible Tourism. Network of people who support the Cape Town Declaration through their work.
IUCN	International Union for Conservation of Nature.
NGO	Non-Governmental Organization.
SAF	Sustainable Aviation Fuel.

TIES	The International Ecotourism Society. Organization dedicated to the promotion of ecotourism in the world.
UN	United Nations. international organization bringing together 193-member states.
UNCED	United Nations Conference on Environment and Development. Conference. better known as the Rio de Janeiro Earth Summit or Rio Summit, was held in Rio de Janeiro, Brazil from June 3 to 14, 1992, bringing together 120 heads of state and government and 189 countries.
UNEP	United Nations Environment Programme. organization dependent on the United Nations, created in 1972, and whose purpose is to coordinate the activities of the United Nations in the field of the environment and assist countries in the implementation of environmental policies.
UNWTO	United Nations World Tourism Organization. specialized agency of the United Nations intended to promote and develop tourism.
WTTC	World Travel and Tourism Council. Global authority on the economic and social contribution of Travel & Tourism.

1 Introduction

Nowadays we hear more and more about global warming, ecology, and other terms relating to the environment, and it is known that tourism is responsible for 8 percent of global carbon emissions (Lenzen, Sun, & Faturay, 2018), and more widely, Transport-related emissions from tourism are expected to account for 5.3% of all man-made CO₂ emissions by 2030 (UNWTO, 2019) Transport-related emissions from tourism are expected to account for 5.3% of all man-made CO₂ emissions by 2030. Tourism not only consists of emissions but also impacts the environment, the economy, and society in both a negative and positive way.

Among other reasons, tourists becoming more conscious of their impact, companies have started to market their ecological commitment, this marketing strategy is called green marketing¹. However, like everywhere, there can be overflows, in this case, it would be greenwashing² the customers.

This research paper aims at analysing the influences and impacts of green travel marketing under three industries: the aviation industry, the travel agencies (like tour operators for example), and the accommodation industry. Leading to the research question “How does green travel marketing influence and impact the tourism industry in the aviation, tour operators, and accommodation fields? How trustworthy is the sustainability marketing of these companies?”.

¹ A green marketing strategy is a business approach that involves promoting products or services as environmentally friendly, sustainable, or socially responsible.

² Cambridge Dictionary (2022) “Greenwashing definition: 1. behavior or activities that make people believe that a company is doing more to protect the environment.” Learn more at: <https://dictionary.cambridge.org/dictionary/english/greenwashing>.

1.1 Research method

This research aims at gaining a deeper understanding of the green marketing topic. Before going deeper into it, the methodology used to gather the data should be presented and examined.

According to Nair (2008), “research’ refers to the process of collecting, documenting and analysing important, critical and relevant information pertaining to any problem or question.”

This thesis is composed of two main types of research. Firstly, a comprehensive literature review that synthesizes and analyses existing scholarship and research on the topic, extracted from different data webs such as Google Scholar, or Scopus data base. Secondly, a series of case studies that examine real-world examples of practices among companies, this data is gathered from the reports published by the companies under investigation.

There are three types of research, causal, exploratory, and descriptive, each has different purposes.

1.1.1 Causal research

Causal research aims to “determine the degree to which one variable is causally related to another” (L. silver, 2012), this means that researchers try to identify the factors responsible for a particular outcome or effect. To do this, three steps are necessary: manipulation of the causal or independent variable, a measure of the effect or dependent variable, and control of other variables that could have an impact on the dependent variable.

By establishing causal relationships, researchers can make predictions about the effects of interventions, develop theories about the mechanisms underlying these effects, and inform policy decisions. (L. silver, 2012).

1.1.2 Exploratory research

Exploratory research is a research approach that is used to investigate a topic or issue when little is known, or when the research problem is complex and requires a deeper understanding. It aims to precisely define ambiguous problems or opportunities, increase the understanding of an issue, develop hypotheses to explain the occurrence of a phenomenon, generate ideas, provide insight, establish priority for future research, and identify the variables and levels of variables for descriptive or causal research (which will be developed later on)

Exploratory research often involves collecting and analysing qualitative data (which will be developed later), collected during interviews, focus groups, observations, or open-ended survey responses. It can also involve reviewing existing literature, examining case studies, or conducting pilot studies to gather initial information about the research problem.

Exploratory research requires flexibility toward the data that can be collected and curiosity about what has been discovered. We will see that this flexibility is minimal with descriptive and causal research.

An important point to note is that exploratory research does not generate precise quantifiable data however, according to the authors, it is not a weakness when the research is properly conducted and interpreted (L. silver, 2012).

1.1.3 Descriptive research

"As the name implies, descriptive research seeks to describe something" (L.silver, 2012). It aims at providing an accurate and detailed portrayal of the research subject or issue, without attempting to establish causal relationships or test hypotheses. Descriptive research is used to describe the characteristics of a relevant group, determine the extent to which variables co-vary, estimate the proportion of a population who act or think a certain way and make specific predictions. Descriptive research aims to answer questions such as "what," "who," "when," "where," and "how" about a particular phenomenon (who will be targeted as a respondent, what issues are of highest priority to be addressed in

the study, how the questions are to be phrased to reflect the vocabulary and experience of the respondents, when to ask the questions, where to find the respondents, and why these particular questions need to be answered to make decisions, (L.silver, 2012). Exploratory research may be needed beforehand to answer all these “WH” questions, exploratory research will also generate a hypothesis and descriptive research will test this hypothesis.

Compared to exploratory research, descriptive research has a more structured and rigid way of collecting data. It typically involves collecting and analysing quantitative data (which will be developed later), such as surveys, questionnaires, or structured observations. It is “more than an efficient means of collecting quantifiable facts” (L.silver, 2012).

1.1.4 Data collection

There are two types of data collection, quantitative and qualitative research.

- Quantitative research: method that focuses on the collection and analysis of numerical data. It can be used to test hypotheses or draw statistically significant conclusions. This data is usually collected through surveys, questionnaires, or experiments.
- Qualitative research: method that focuses on understanding and interpreting behaviors or people’s experiences through non-numerical data. It involves the collection of data such as interviews or observation to understand a particular topic or phenomenon from participants in their natural habitat.

For this case study research consisting in analysing and comparing company reports concerning their sustainable engagements, a descriptive and exploratory approach have been chosen, following quantitative and qualitative methodologies. Descriptive research because reports from the companies will be the data being analysed to describe the current state of the companies, their performance, and other relevant factors (quantitative analysis). Exploratory research since the researcher is looking to gain new insights and explore the reports to identify key themes, trends, and patterns to inform the research question (qualitative analysis).

1.1.5 Limitations

While reading and comparing reports can be a valuable source of data for this research, there are several limitations to this approach.

Company reports are written by the company and are often biased towards presenting the company in a positive light. Secondly, the data provided may lack the context necessary to fully understand the data. Finally, not all companies produce reports or make them publicly available, limiting the scope of this research.

For these reasons, the results of this work cannot be applied to all companies. However, they provide the reader with an understanding of the differences and similarities between the actions taken by companies in a particular industry and also across the different industries studied.

2 Literature review

2.1 Tourism impacts

The tourism industry has significant impacts on various aspects (i.e., the population, the economy, or the environment)

On one hand, the tourism industry presents many positive impacts. To begin with, it offers tourists the opportunity of exploring new places and cultures, which broadens their horizons and provides unique experiences. Moreover, tourism can help to preserve cultural heritage sites and natural environments. It can also facilitate cultural exchange and understanding when people from diverse backgrounds come together and share their experiences. This can increase tolerance and empathy between individuals and communities.

Secondly, the tourism industry contributes significantly to economic growth and creates jobs in many parts of the world. It also stimulates the development of infrastructures such as hotels but also transportation networks and public

facilities, which can benefit communities in the long term. Additionally, the industry can provide a platform for businesses to thrive, especially in the hospitality and service sectors. This can contribute to the local economy and support small businesses.

However, when the tourism market is growing, downsides are growing too. Mass tourism has a cost, it brings more pressure on the local ecosystem, or travel emissions grow for example. Generally, tourists do not understand their impact (socially, or ecologically).

Negative impacts of the tourism industry include:

2.1.1 Environmental degradation

It is known that the aviation industry is a significant contributor to climate change. Indeed, the industry is estimated to be responsible for 3,5% of global warming (Ritchie, 2020). This is explained by the fact that planes emit greenhouse gases throughout all different stages of a flight, when flying in the stratosphere (second layer of the atmosphere, above the troposphere) where the ozone layer is situated, they release gas which can have “different effects when emitted at this altitude relative to emission at ground level” (UK Civil aviation authority, 2023). The carbon emissions of aircraft are only one side of the negative impacts generated by the aviation industry, there are also multiple impacts to consider. Among those we can cite the airport ground vehicles emissions, all the power used for the airport buildings, the aircraft noise pollution for residents around the airport, the damages to local wildlife, habitats, and water courses caused by the construction of the airport but also by its functioning (for example de-icing and handling fuel cause the pollution of surface water) and finally the waste generated in the terminals but also aircraft wastes which can be difficult to manage (UK Civil Aviation Authority, 2023).

2.1.2 Crowding and congestion

This happens when a destination attracts more tourists than it can sustain. Crowding is when there are too many people at a particular place, and congestion is when an obstruction or a narrow passage is causing a block for the flow of tourists or forcing it to slow down. This results in long queues to enter cultural sites, traffic congestion, a feeling of crowding in narrow streets, being forced to walk slowly in those areas, noise in overcrowded places, and congestion in public transport. This leads to a degradation of the visitor experience, and it can also harm the quality of life for residents. The city of Dubrovnik is a real-life example of how a city can be impacted, in 2016, the mayor asked the residents to stay home to avoid the dangerous levels of crowds disembarking from multiple cruise ships, which made the residents angry. Since then, the city has had to restrict the number of visitors arriving each day. (Simmons, n.d)

2.1.3 Cultural erosion

Cultural erosion is the process of a civilization or group losing its cultural identity, traditions, and/or heritage (loss of language food, music, clothes, and more) because new elements take their place. This can happen when communities adapt to meet the expectations of tourists, leading to the erosion of their culture. We can, for example, cite the Pokhara-Ghandruk community in Nepal, (Pandey, Chettri, Kunwar and Ghimire, 1995, cited by Shahzalal, 2016): the younger generations, wear western modern dress and hairstyles instead of the traditional Nepali ones, disobey the elder's Kinship titles, prefer love-marriage instead of arranged-marriage, drink with friends and organize dinner parties instead of home. This cultural change worries the elderly who are totally against it. It is however important to note that these changes are caused by an addition of factors, tourism being part of them, the easy access to Indian movies, dress, and so on, are also factors to take into account.

2.1.4 Exploitation

The rise of tourism also creates more opportunities for the exploitation of workers, children, and vulnerable populations. Some tourists may participate in activities involving animal exploitation, like elephant riding or swimming with captive dolphins for example (Caruana, 2022). Tourists may also exploit local people by going to hotels with locals as staff, who have really low wages, work long hours without a break, and in unhealthy conditions. This is because they are living in poverty and do not have many options for employment when their city is touristic, also, in underdeveloped countries, most of the time union workers do not exist or are inefficient. (Sylger-Jones, 2022).

2.1.5 Economic leakage

Tourism can in some cases, result in economic leakage, meaning that the benefits of tourism do not stay within the local community, but instead flow back to multinational corporations or foreign investors. This can result in limited economic benefits for the local community and can perpetuate economic inequality. In Fiji, the Central Bank has estimated that “60 percent of the money earned through tourism ends up leaving Fiji” (RNZ News, 2015). A study from the UNEP (United Nations Environment Programme) (cited by Suryawardani, 2020) shows that tourism leakage in third-world countries ranges from 40% in India to 80% in the Caribbean.

2.1.6 Overuse of natural resources

Finally, excessive tourism can result in an overuse of natural resources such as water, land, or energy. This can later lead to tourism often relying on natural resources such as water, energy, and land. Overuse of these resources due to high tourist demand can result in a diminution or even disappearance of them, leading to conflicts over resources and compromising the sustainability of local communities and ecosystems.

2.2 Sustainable tourism

To understand this thesis better, it is important to define the terms that will be used. Indeed, ecotourism, sustainable tourism, and especially green tourism are some of the most misused ones in the tourism industry.

It is first important to understand that the difference between all the terms used is the extent of what they encompass.

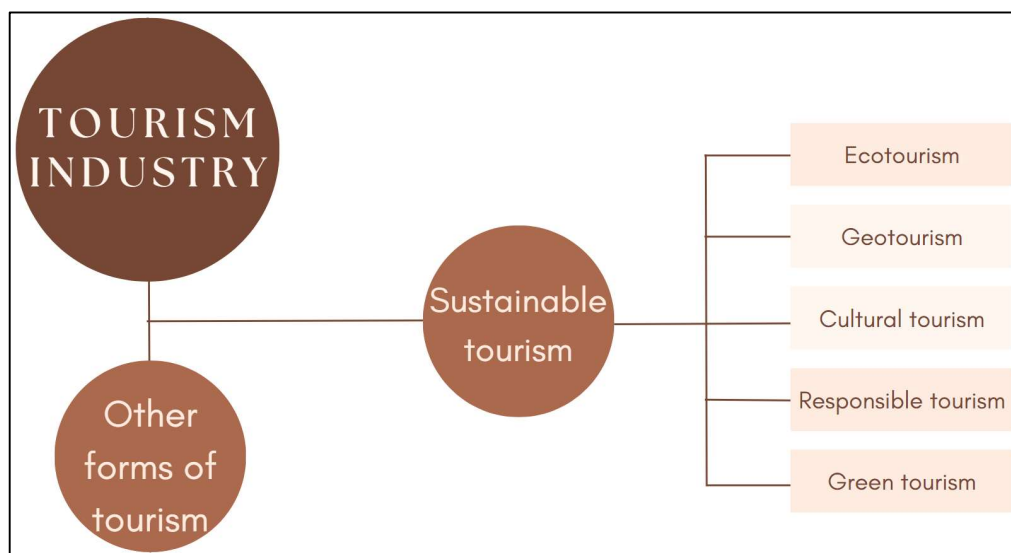


Figure 1. Diagram showing the different subcategories and segments of the travel industry.

The widest term, and the one that will be the most used in this research is Sustainable tourism. Sustainable tourism is an application of the concept of Sustainable development to tourism. Sustainable development, as defined by the Brundtland commissions in 1987 in the report “Our common future”³ is a “Development that meets the needs of the present without compromising the ability of future generations to meet their own needs”³. According to the Mohonk agreement (Unanimously, 2000), sustainable tourism is tourism that seeks to minimize ecological and socio-cultural impacts while providing economic benefits to local communities and host countries. This shows us that

³ Report available at <https://sustainabledevelopment.un.org/content/documents/5987our-common-future.pdf>. Last accessed April 16th, 2023

sustainable tourism has three main principles: social, economic, and environmental sustainability:

- Have a minimal negative impact and maximize the positive impacts of tourism, while conserving resources or using them wisely to maintain their long-term viability.
- Consider social variables that deal with community, education, health, well-being, and equity.
- Generate economic benefits. (Taveras Dalmau, 2020)

As we can see on the previous diagram, sustainable tourism has many subsets: ecotourism, geo-tourism, cultural tourism, responsible tourism, and the list goes on. According to National Geographic, “geotourism is defined as tourism that sustains or enhances the distinctive geographical character of a place—its environment, heritage, aesthetics, culture, and the well-being of its residents”. (National Geographic, n.d). Cultural tourism is “traveling to experience the places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural, and natural resources” (Taveras Dalmau, 2020). This research is mainly focusing on the terms ecotourism, responsible tourism, and green tourism. These different terms are also widely misinterpreted since the differences between them can seem minimal but also because for one term, multiple definitions can be given and used. For example, ecotourism can be defined as according to Freedman by Paul Herbig and Brad O’Hara “segment of the travel industry which appeals to the environmentally conscious and has a low impact on the surrounding area while contributing to the local economy” (1997) but The International Ecotourism Society (TIES) defines it as a “responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education” (2015). We understand that ecotourism is revolving around the protection of the environment and the local economy, to make it clearer, this research refers to ecotourism as per the definition of the Mohonk agreement: “Ecotourism is sustainable tourism with a natural area focus, which benefits the environment and communities visited, and fosters environmental and cultural understanding, appreciation, and awareness.” (Unanimously, 2000). In this definition, it is written that ecotourism is a subset of sustainable tourism but with a particular focus:

conservating the ecological surroundings, educating travellers about the local environment and the natural surroundings. The Mohonk agreement comes from the Mohonk Mountain House (New York) where on November 17th to 19th 2000 representatives from the world's most important certifications programs met and came to a consensus about principles and elements that should be part of ecotourism and sustainable tourism certification programs. It is a significant document since it is one of the first agreements clearly differentiating ecotourism from sustainable tourism. It defines the principles of ecotourism as (1) Minimizing physical, social, behavioural, and psychological impacts, (2) building environmental and cultural awareness and respect, (3) providing positive experiences for both visitors and hosts, (4) providing direct financial benefits for conservation, (5) generating financial benefits for both local people and private industry, (6) delivering memorable interpretative experiences to visitors that help raise sensitivity to host countries' political, environmental, and social climates, (7) design, construct and operate low-impact facilities, and (8) recognize the rights and spiritual beliefs of the Indigenous People in your community and work in partnership with them to create empowerment (TIES, 2015).

2.2.1 Responsible tourism

The first definition of this term appeared in 1996, written by the Government Of South Africa Department Of Environmental Affairs And Tourism, it states that Responsible tourism is "tourism that promotes responsibility to the environment through its sustainable use" (1996). In 2009, the city of Cape Town defined it as tourism "that creates better places for people to live in, and better places to visit". The framework to ensure that tourism in the destination is responsible has been created (Council of Cape Town, 2009), it states that tourism should:

- Make positive contributions to the conservation of natural and cultural heritage embracing diversity.
- Minimize negative economic, environmental, and social impacts.
- Provide more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social, and environmental issues.

- Be culturally sensitive, encourage respect between tourists and hosts, and build local pride and confidence.
- Generate greater economic benefits for local people and enhance the well-being of host communities.
- Provide accurate information about the accessibility of facilities and infrastructure for people with disabilities (visual, communication, mobility) to customers.
- Involve local people in decisions that affect their lives and life chances, and
- improve working conditions and access to the industry.

2.2.2 Green tourism

Another notion widely used during this research paper is green tourism, there is no founded definition of it, Meler and Ham (2012) describe it as “emphasizing the preservation of the environment”, which is intended for the type of tourists who have a strong sense of responsibility of the environment where they visit. According to Pedro Pintassilgo (2016), the concept of green tourism has evolved, the first definition from 1980: “small-scale tourism which involves visiting natural areas while minimizing environmental impacts” is now adopted by businesses with a broader meaning: “any tourism activity operating in an environmentally friendly manner”. We can conclude that green tourism is a subset of sustainable tourism in its essence, however, its now vague definition and meaning that can change depending on a person’s vision can be useful for companies to use when the words ecotourism or responsible tourism cannot be used. We can witness here the beginning of something that can be used during greenwashing.

2.3 History of sustainable tourism

These concepts are all rather new since they are answering to the negative impacts of tourism. Ecotourism was the first of these concepts to emerge, followed by sustainable tourism, green tourism, and responsible tourism.

According to Thulasimala and Devdass, ecotourism started in the 1950s as a concept similar to the one we now know: “Ecotourism is first introduced in Africa in the 1950s with the legalization of hunting. This need for recreational hunting zones led to the creation of protected areas, national parks, and game reserves.”

(2010). The concept of ecotourism became widely known in 1987 thanks to Hector Ceballos-Lascuráin (Sharpley, 2006, as cited in Das and Chatterjee, 2015) who wrote its first formal definition: “tourism that consists in traveling to relatively undisturbed or uncontaminated natural areas with the specific object of studying, admiring and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas” (Higham, 2007), the International Union for Conservation of Nature (IUCN) adopted his modified definition officially in 1996. Over the years, people have started to realize the importance of preserving the environment and as stated by Das and Chatterjee (2015), the United Nations Conference on Environment and Development (UNCED) promoted a “Sustainable Nature-based Tourism” in 1994, responsible travel practices that minimize negative impacts on the environment and promote sustainable development. In 1995, the formulation of the term “Eco-efficiency” by the World Business Council for Sustainable Development aimed at encouraging businesses to reduce their negative impact on the environment while still having an economic benefit. Creations of organizations such as The International Ecotourism Society (TIES) in 1999 also helped to popularize the concept of ecotourism and establish it as a viable alternative to traditional forms of tourism. To start the new century, the United Nations chose 2002 as the ‘International Year of Ecotourism’ during which a compilation of 65 case studies received from 47 countries about exemplary practices in small ecotourism businesses has been published. According to Butcher (2006), this year marked an increase in ecotourism as an exemplary form of sustainable tourism. Continuing on this path, the United Nations World Tourism Organization (UNWTO) recognized ecotourism at the United Nations General Assembly on 21 December 2012 (Das and Chatterjee, 2015) as a “key in the fight against poverty, the protection of the environment and the promotion of sustainable development” (UN agency welcomes General Assembly’s adoption of resolution on ecotourism, 2013).

The concept of sustainable tourism emerged in the 1980s as a more comprehensive approach that addressed the economic, social, and environmental impacts of tourism as a whole. In 1992, the United Nations Conference on Environment and Development, also known as the Earth Summit,

held in Rio de Janeiro, Brazil, put sustainable tourism on the global agenda. Agenda 21, the conference's action plan, called for the development of sustainable tourism practices that would promote economic growth, preserve natural resources, and benefit local communities. (Hardy, Beeton and Pearson, 2002)

The Global Sustainable Tourism Council (GSTC) was founded in 2007 to promote sustainable tourism practices worldwide. The GSTC established a set of criteria for sustainable tourism, which includes the environmental, social, and economic aspects of tourism. (GSTC, n.d)

In recent years, sustainable tourism has gained momentum as an important approach to tourism development. Governments, tourism operators, and travellers are increasingly recognizing the importance of sustainable tourism practices in preserving destinations for future generations. Today, sustainable tourism is seen as a key driver of economic growth and development, while also promoting environmental and social sustainability.

The concept of responsible tourism emerged in the early 2000s. The International Centre for Responsible Tourism (ICRT) was established in 2002 to promote responsible tourism practices. The ICRT developed a set of principles for responsible tourism, which included minimizing environmental impacts, respecting local cultures and customs, creating economic benefits for local communities, and providing meaningful experiences for tourists. (Goodwin, 2014)

Having explored the evolution of sustainable tourism, it is now important to shift our focus to the people who make it all possible - the tourists themselves.

In a review from Dolnicar, Crouch, and Long (2008), combining 29 different research papers, it has been shown that 44% of these tourists, referred to as EFTs (Environmentally Friendly Tourists), do not include nature protection in their definition of sustainable and ecotourism. As we have seen earlier, nature protection is a fundamental pillar of both green and ecotourism. It is suggested that they associate ecotourism and sustainable tourism with nature-based

tourism (outdoor activities in the natural environment). This lack of not fully knowing what they really refer to when they consider themselves environmentally friendly can raise some concerns and marketers can use this to their advantage.

A review by Dolnicar and Juvan named “Ecotourists: who are they and what should we really call them” (2013) shows the same findings. A new naming convention was proposed to ensure consistency across studies. In this paper, ecotourists are those whose primary characteristic is their “engagement in nature-based tourism with the deliberate intention to experience nature”, ecotourists can but do not have to be environmentally friendly. And, that sustainable tourists are those whose” actual vacation behaviour consists of conserving, protecting or even improving the environment at the destination”, in the same way, environmentally sustainable tourists do not necessarily spend their vacation visiting natural attractions. It is suggested that “the sub-segment of ecotourists who behave in an environmentally sustainable manner is referred to explicitly as ”sustainable ecotourists”. The following figure better explains what has been presented concerning those three terms.

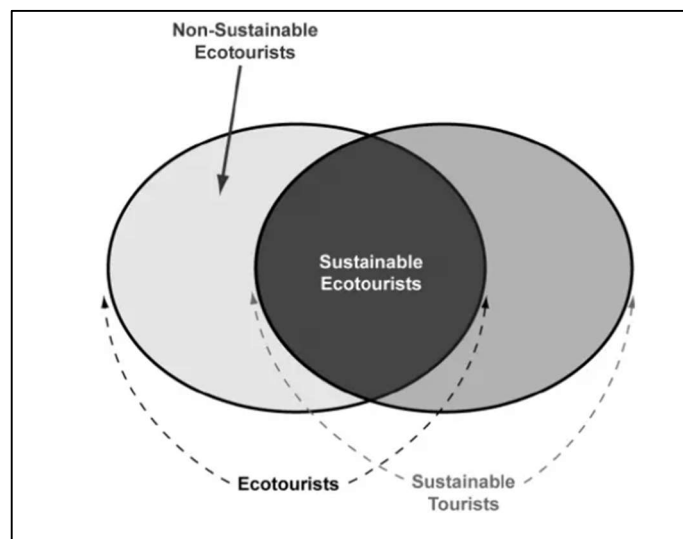


Figure 2. Ecotourists naming convention.

The writers, therefore, note that “the Sustainable Ecotourist requires a tourist to comply with the measure proposed above for qualifying as a member of both the segment of ecotourists and the segment of Sustainable Tourists”.

The previous article from Dolnicar, Crouch, and Long (2008) showed that EFTs are mostly highly educated with an interest in learning and have a higher income level. However, some studies concluded that the EFTS are middle-aged, and others concluded that they are older tourists. It is well known that sustainable eco tourists and tourists, in general, come from more developed countries however, because of all the different names given to them (rightly or wrongly) it is complicated to identify them specifically and get more numbers about them. According to Statista (2022), 81% of travellers think that sustainable travel is important, however, only 69% of tourists plan to travel sustainably in 2023. A study made by Agoda (2021) about sustainable travel trends revealed that only 20% of the public consider themselves accountable for making change (26% consider the Government most accountable and 23% consider the tourism authorities). Finally, according to Avantio (2023), “61% of travellers are interested in learning more about ecotourism, whereas only 46% feel clear on how to actually arrange sustainable trips”, we can see here that even trying their best, unclear information makes it hard for tourists to become sustainable ecotourists.

2.4 Green Marketing

The tourism industry is responsible for an important part of global warming. As an answer, companies have started to have a greener strategy and market it. Here are examples of it put into action in the three chosen fields.

2.4.1 Aviation industry

Aviation companies green marketing consists of communicating about the efforts they make for the environment. They communicate about fuel efficiency, by getting a modern fleet of aircraft or improving the fuel efficiency of their flights (by having fuel-efficient flies for example). Some communications however stand out of the crowd, we can cite Finnair, voted the most sustainable airline in Finland in 2022, which has been communicating about the replacement of plastic cutlery with wooden cutlery, increasing the availability of vegetarian food or reducing food waste. KLM communicated about its investments in the electrification of ground equipment, the company has also

created a carbon offset product called CO2Zero, when a passenger chooses to offset their carbon emissions, KLM invests the money in projects such as forest conservation, renewable energy, and reforestation.

The company Wizzair, which claims to have one of the lowest emission rates among European aviation companies (with carbon emissions per passenger kilometre at 57.28 grams, in 2020, half the industry average) launched a green campaign in 2022 with the tagline being, as we can see it on their tweet, “Dear customer, if you do not have to fly, please do not. But if you do, fly the greenest.” (Kocik, 2022)

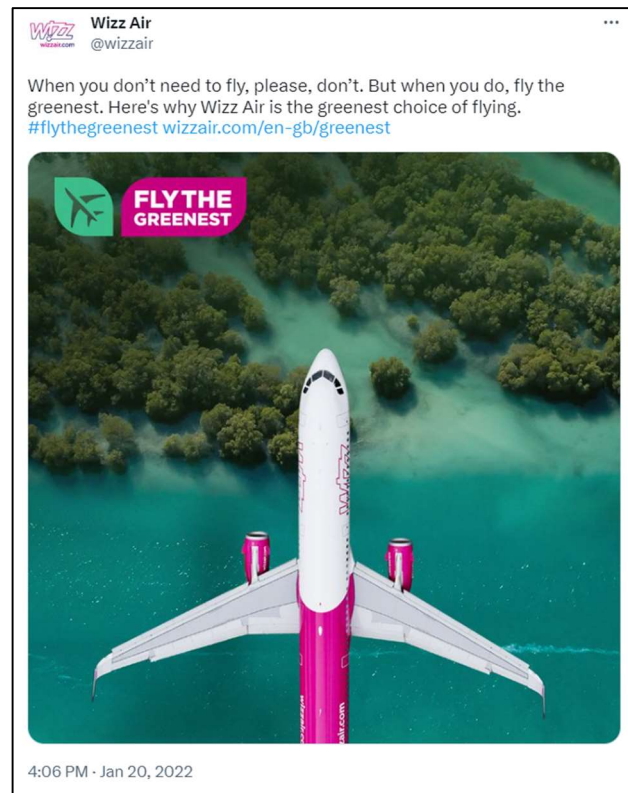


Image 1. Example of Wizzair’s marketing on social medias (here: Twitter)

The United Nation’s Net zero coalition, launched in September 2019, is meant to cut greenhouse gas emissions to as close to zero as possible (UN, s.d.). The aim is to achieve this objective by 2050. Even if according to the United Nations, this objective is not likely to be achieved on time. This can only work if all sectors work together, some aviation companies are trying to make some changes. We can for example cite Qantas, Boeing, or Airbus which are preparing to launch the first zero-emission commercial aircraft propelled with alternative fuels like synthetic hydrocarbon fuel, hydrogen fuel, or even batteries by 2035.

The first results are promising, and Airbus aims to start flight tests by the end of 2026 (Pfeifer, 2022). Also, Hydrogen contains more energy by weight than aviation fuel (Pfeifer, 2022). This would mean that for the same fuel weight, planes could fly for a longer time, or it could also be possible to reduce the fuel

weight in the plane (and have the same energy as with aviation fuel) and allow more passengers on board. Traveling by plane while emitting reduced amounts of CO₂ (80 percent less with sustainable fuel than with traditional aviation fuel and no emissions when using hydrogen) would help consequently to reduce global emissions and reach this Net-zero objective.

However, issues arise with this innovation. Indeed, according to Sylvia Pfeifer (2022), energy companies are producing less than 0.1% of aviation needs in sustainable aviation's needs today. A second issue is the price, a sustainable fuel is calculated to be between two and six times more expensive than traditional jet fuel. We saw earlier that environment-friendly tourists are with higher incomes but having plane fuel even more expensive would allow only the richest to choose green travel. Even if this sustainable fuel and hydrogen fuel can be implemented, having airplanes flying with these fuels requires tremendous technical changes: aircraft design and airport infrastructures need to be changed, airplanes need to be ready for storing the hydrogen safely, liquid hydrogen needs to be stored at minus 253 degrees Celsius, needing the development of adapted distribution system, and finally, hydrogen fuel burns at a higher temperature than ordinary fuel, requiring here again an adapted colling system and insulations.

Also, according to Sylvia Pfeifer (2022) and Fernyhough (2022) hydrogen and battery-powered planes will be, in the beginning, used only for short-distance travel. However, according to the Air Transport Action Group (ATAG, s.d.), Flights of over 1500 kilometres are responsible for around 80 percent of aviation CO₂ emissions. So, if these solutions even being the perfect candidates to reduce emissions, cannot be used yet, this means that this Net-zero objective seems very far away. We can however highlight the effort made and encourage its development in the future.

On the other side, some companies have been creating green campaigns misleading their customers. This is the case with the company KLM, which was sued for greenwashing in 2019. Their campaign with the tagline "Be a hero, fly CO₂ zero" and declaring that the airline is "creating a more sustainable future" and featuring the CO₂Zero product mentioned earlier (allowing customers to

offset their carbon emissions) (Thomas, 2022). The campaign also claimed that KLM was working towards "fly responsibly" and "reduce CO2 emissions per passenger by 20% by 2020". However, the Advertising Code Committee (ACC) ruled that the claims were not substantiated and were therefore misleading to consumers. KLM was ordered to remove the misleading claims from its advertising and to refrain from making similar claims in the future. In 2018, the company was also accused of greenwashing when it was exaggerating the environmental benefits of its use of biofuels in flights between Los Angeles and Amsterdam. Greenpeace and other environmental organizations argued that the use of biofuels did not result in a significant reduction in carbon emissions.

2.4.2 Travel agencies

As we have seen earlier, some tourists can feel unclear as to how to arrange sustainable trips and can seek the help of professionals. They can require the service of travel agencies, it can be to plan how to get to a destination, what to do in a certain location, or even plan a whole trip from A to Z. These agencies specialized in package holidays are commonly known as "tour operators".

Knowing that tourists are more and more interested in green travel, travel agencies have widened their offer for this market share. We can for example cite the reduced CO2 emissions travels, where an agency will give detailed emissions during the trip (E.g., during this travel the train will emit this amount of CO2, this represents the emissions of a typical household for this amount of time).

Travel agencies like G Adventures communicate about their green efforts with programs such as the "Ripple Score" program that rates its tours on their sustainability practices ("the higher the Ripple Score, the more money that is staying in the local community"). The company also has a "G for Good" program that supports community development projects in the destinations visited. G Adventures has been named the "World's Leading Green Tour Operator" at the World Travel Awards in 2016 and 2017. The Ecoventura travel agency offers eco-friendly cruises in the Galapagos Islands, with a focus on conservation and environmental education. A last example could be the company Responsible

Travel promoting sustainable tourism by offering eco-friendly tours and promoting responsible travel practices such as reducing waste and supporting local communities. The has received several certifications for its sustainable practices.

A study on travel agencies on the Galapagos Island (Self, Self, & Bell-Haynes, 2010) showed that most of the agencies were reflecting the principles of ecotourism according to the Mohonk agreement. Indeed, all of them were providing guides and most of them (80%) were selling educational opportunities on wildlife and flora, but not on the Ecuadorian society and culture. Also, a majority of the companies studied indicated that they contribute financially to local conservation organizations, hire local employees, and provide economic benefits to locals. A small part of them (20%) were providing socio-cultural benefits to the locals.

However, from the same study, Self, Self, and Bell-Haynes (2010) denounce greenwashing from other companies. Indeed, those mentioning providing socio-cultural benefits to locals did not mention hiring local employees, an important part of ecotourism. Also, concerning sustainable practices (E.g., carbon neutral policies, recycling, and minimizing waste), less than half of them are indicating them on their website. And most tourists book their trips online, it would then be necessary for the companies to indicate all the practices on their websites to avoid misleading their customers. This shows that companies can hide information from their customers, and it can be debated whether or not it is greenwashing.

A report on French television followed a group of friends during their “green holiday” organized trip in France (Capital, 2022). This trip is about hiking, with a bigger group of people and a guide giving them information on the fauna and flora around them. Even if not mentioned, we can see that the group is from the older category (50 years old and more). Every night, the group arrives at a new hotel, a partner of the agency providing the trip. In these hotels, they have an all-inclusive experience (restaurant, beautiful views, and access to a spa for certain hotels). In the report, the owner of a hotel says that every year they have a certain number of rooms reserved for these hiking groups of people (with or without travel

agencies) and that this amount keeps increasing. Hiking seems to get trendy, and we understand why: it is free, you chose which way you are going and at which pace.

However, on the report, we can see that none of these hikers are carrying bags except for small backpacks containing their essentials for the day. The reporter interviews one of the hikers to ask how they can last for at least a week with just this bag and the answer is that they don't carry the travel bags, they leave them at the hotel in the morning and find them at the next hotel in the evening. The report goes further and found a company in charge of carrying those bags, partnering with the travel agency. Big vans go daily to do a tour of the hotels, pick up the bags, and deliver them to their next hotels. So, these tourists who want to be close to nature, do not realize that because they walk to go to the next hotel does not mean that their bags walk too. This follows what has been seen earlier, some tourists claiming to be environment-friendly are looking for a nature-based tourism.

On the other side, even when tourists try to reduce the impact of their travels, they can be misled by companies. the case of the company Carnival Corporation is a great example of greenwashing. Carnival Corporation is the world's largest cruise company. In 2019, the company was fined \$20 million for violating environmental laws and for misleading customers about its environmental practices (Mervosh, 2019). It has been found that the company had been illegally dumping oil, plastics, and other waste into the ocean, and had been falsifying records to cover up the illegal practices. While doing this, the company has been promoting itself as an environmentally responsible company, using terms like "eco-friendly" and "sustainable" and claiming to have implemented initiatives like reducing fuel consumption and emissions, and investing in new technologies to improve energy efficiency, to attract customers.

2.4.3 Accommodation industry

Some environment-friendly tourists, when booking their holidays, take great care of choosing accommodations following their values. According to Statista (2022),

78% of travellers planned to stay in eco-friendly or green accommodations in 2023. This can be by choosing to sleep at some friend's/newly met strangers' houses, by camping in a tent and respecting the surroundings, or by selecting an environmentally friendly hotel. On top of what the hotel chains or other accommodations can market on their websites, the customers can make sure that they respect their values thanks to certifications, like eco-labels for example. Eco-labels are used to prove that a manufacturer (in this example it will be an accommodation provider) conforms to recognized environmental standards. Some examples of eco-labels in housing are the Green Key certification, EU Ecolabel for Tourist Accommodation, or Green Globe.

2.4.3.1.1 Green key certification

According to the Green Key website, this eco-label “represents a commitment by businesses that their premises adhere to the strict criteria set by the Foundation for Environmental Education” (Green Key, n.d). The Foundation for Environmental Education (FEE) is a non-governmental organization (NGO) founded in the early 1980s, promoting sustainable development through environmental education. To make it clearer, the green key program is operated under the management of the FEE.

The green key certification is available for six categories of accommodation: hotels and hostels, campsites and holiday parks, small accommodations, conference centres, restaurants, and attractions. They all follow a set of thirteen criteria: Staff involvement, Environmental management, Guest information, Water, Energy, Washing & Cleaning, Food & Beverage, Waste, Administration, Indoor Environment, Green areas, Green activities, and Corporate social responsibility. As cited on the website, most of the criteria are imperative, however, some others are guidelines and must be met “depending on the years of involvement in the Green Key program” (Green Key, n.d).

2.4.3.1.2 EU Ecolabel for Tourist Accommodation

According to the document provided by the European Commission (n.d.) this certification is for “Tourist accommodations looking to become certified must

adhere to twenty-two mandatory criteria and receive at least twenty points under optional criteria". The criteria are classified under different categories: Energy, Water saving, General management, Waste reduction, Information to guests, and Information on the EU Ecolabel. As we can see, this eco-label is similar to the precedent certification, however, the green key certification accredits accommodations everywhere in the world, whereas the Ecolabel for Tourist Accommodation is only reserved for accommodations in the European Union.

2.4.3.1.3 Green globe

The Green Globe certification is less popular; however, it is available for a total of 11 categories, including hotel & resort, cruise ships, or travel industry. This certification is made of 44 criteria under 4 categories: Environmental, Sustainable Management, Social Economic, and Cultural Heritage. According to their website, "Green Globe is the premier worldwide certification and performance improvement program developed specifically for the travel and tourism industry" (Green Globe, n.d).

This difference in popularity can be explained by the number of criteria more important than the other certifications seen previously. It could also be explained by the cost of the certification. Indeed, If we take the example of hotels/hostels, the price paid for the Green Globe is an annual membership rate depending on the number of rooms: 650euros when less than 20 rooms but already 1200euros when between 20 to 59 rooms. For the green key certification, it is the same annual membership cost for all hotels/hostels of 1000euros, to this, the hotels have to add 500euros of audit and also add travel costs (for other onsite audits) in years 1,2, 5, and after, every 3 years. When choosing between those two certifications, owners of hotels with over 20 rooms have to take into consideration the short terms and long-term costs of the accreditation. In the long run, the Green key certification seems to be the preferred solution even if it doesn't appear as it is.

Some hotels have also created programs as part of their green strategy, we can, for example, cite Marriott International with their "Green Hotels Global" program, which is designed to promote sustainable practices in their hotels and resorts

around the world, the "Serve 360" program, which includes goals to reduce energy and water usage, reduce waste, and source sustainable materials. The company also has a "Green Meetings" program that encourages sustainable practices for meetings and events. The company Hilton has a sustainability program called "Travel with Purpose" that includes goals to reduce energy and water usage, reduce waste, and source sustainable materials. Hilton has also launched a "Clean the World" partnership that recycles soap and amenity bottles to help reduce waste and improve hygiene in communities in need. The chain Hotels and Resorts has also created a "LightStay" program, which is a sustainability performance measurement platform that tracks and analyses environmental and social impacts. Hyatt with the sustainability program called "Hyatt Thrive", AccorHotels and its "Planet 21" program, Four Seasons Hotels and Resorts and its "Lead With Care" program, the list goes on.

On the other side, many hotel chains have been accused of greenwashing (Marriott International, Hilton Worldwide, and others) by overstating their green initiatives and not doing enough to address environmental issues. It is important to mention that in the last 10 years, some of them have been sued for false advertising of green initiatives but none of them have been sued for greenwashing strictly speaking.

When it comes to eco-labels and accreditations in this industry, consumers can also be prone to greenwashing. The Global Sustainable Tourism Council (GSTC) is a global standard for sustainable travel and tourism; as well as providing international accreditation for sustainable tourism Certification Bodies (Hocking, 2022). The GSTC's role is not to certify any services or products but to provide an accreditation program. The GSTC recognizes labels that answer to four criteria: sustainable management, socio-economic impacts, cultural impacts, and environmental impacts, each adapted to the local conditions and specific criteria added depending on the location and the activity are meant to adapt to every tourism destination. The GSTC currently recognizes 26 labels.

However, a multitude of eco-labels are currently in use, often seen as high costs and a high level of bureaucracy, some companies prefer to advertise their hotels

as eco-friendly without a certification (with or without the help of the creation of a program, as seen earlier), in some cases, we can observe greenwashing.

This can be observed for example when travellers will go to a hotel with a sign written “A towel on the rack means I will use it again, a towel on the floor means Please replace” but around the sink can be found single-use plastic shampoo bottles and no way of recycling them. Here we guess that if hotels are suggesting customers to clean their towels a smaller amount of time it is to reduce their bill for water and electricity rather than caring for the environment. Hotels are more and more reducing these travel-size toiletries because they realized that it is a better option money-wise. Liam Brown, Marriott International’s president and managing director said in 2018 that it would save around 2 000 dollars per hotel every year, Marriott could save around 14 million dollars every year, a non-negligible cost. (McCartney, 2018)

There is the interesting example of the Hotel Marcel, opened in May 2022 in New Haven, USA. It is the United States’ first net zero carbon-emissions hotel. However, according to Jackie Caradonio (2022), it missed one huge consideration: embodied carbon (carbon emission associated with the materials and the construction process during the whole life cycle of an infrastructure). In the case of the Hotel marcel, the triple glazed window is promoted to keep the heating and cooling costs down, new efficient mechanical systems and the remodelling of all the rooms, which seem at first sight like a sustainable decision. However, they are in fact all embodied carbon to conceive, transport and install. It is a significant initial investment which can be justified on the basis of saved emissions later due to better insulation and reduced energy. This lack of transparency toward customers can be seen as greenwashing for some people.

3 Case studies

As explained earlier in the limitations of this research, not all companies make their reports public. That is why, some companies could not have been studied and alternatives to them have been found. For each of the fields studied in the literature review (aviation companies, accommodations, and travel agencies),

two companies were chosen, one with a green or sustainable strategy, and one without. When the companies were selected, their Corporate social responsibility (CSR) reports (or sustainability reports when available) for the past year were studied and compared.

3.1 Case study of Finnair and Ryanair

The first documents studied to answer this research question in the aviation industry are Finnair's annual report and Ryanair's sustainability report from 2022.

Finnair, Finland's national airline, is headquartered in Vantaa near Helsinki. It was founded in 1923, making it one of the oldest airlines in the world. Finnair operates flights to more than 100 destinations in Europe, Asia and North America. The company has won several awards for its services (we can cite the "Best Airline in Northern Europe" at the Skytrax World Airline Awards), and is known for its strong focus on sustainable travel and its reputation as a safe and reliable carrier. In terms of sustainable marketing, Finnair has emphasized responsible business practices and sustainable travel, with titles such as "Our most important destination is the future" on its website.

On the other side, Ryanair is an Irish low-cost airline founded in 1984. It is headquartered in Dublin and operates over 1,800 flights daily from 87 bases across Europe and North Africa. Ryanair is one of the largest European airlines and has a fleet of more than 460 Boeing 737 aircraft, which allows it to offer its passengers low fares to a wide range of destinations. Ryanair has faced criticism in the past for its environmental impact and lack of commitment to sustainability. However, in recent years the company has made efforts to improve its sustainability practices and promote its environmental initiatives. Ryanair claims that "by choosing Ryanair, you're flying with the greenest and cleanest airline in Europe" and that the company is the "No.1 leader in aviation sustainability".

The following table compares the two documents since both companies have goals concerning the same topics (left column of the table), but their actions show some differences. In each section are citations from the report of what each

company has been doing during the year 2022 or plans on doing for the next years.

To understand these documents and tables better, a few comments are necessary. First, the emission breakdown of companies is divided into 3 scopes:

Scopes 1 and 2 are owned or controlled by a company, for an airline, scope 1 emissions are the flight operations, mostly jet fuel emissions, and scope 2 are the emissions generated by the offices or hangar. Scope 3 emissions are the consequences of the activity of a company, but it comes from sources that the company cannot control or does not own, for an airline, scope 3 emissions examples could be fuel transport, or aircraft manufacturing.

In its report, Finnair does not give a clear breakdown of its emissions, it is only mentioned that “92% of Finnair’s greenhouse gas emissions relate to flight operations, burning jet fuel (Scope 1) and its production and transportation (Scope 3)” (page 27). The reader cannot know how important each scope is. On the other side, Ryanair gives a more detailed breakdown. With calculations, 99,96% of Ryanair’s emissions are scope 1 and 3, a much more important amount than Finnair. However, the 0,04% left are Scope 2 emissions, it is easier for Ryanair to have low emissions on that scope since the company does not own any airport, unlike Finnair. It would have been interesting if Finnair gave a more detailed breakdown of the emissions to compare the companies more accurately.

Table 1. Comparison of Finnair and Ryanair’s reports for the year 2022.

	Finnair	Ryanair
Emissions breakdown	Scope 1 and 3: 92% Scope 2: 8% (p.27) by the end of 2025 it intends to “halve its Scope 1 and 2 CO2 emission net balance	Scope 1 81.55% Scope 2 0.04% Scope 3 18.41% (p.12)

	Finnair	Ryanair
	compared to the 2019 level” (p.26)	
Alliances	<p>Partnered with Neste in Finland to increase the use of Sustainable Aviation Fuel (SAF). (p.27)</p> <p>Increase the use of SAF with the oneworld Alliance (which set a goal of achieving a 10 per cent level in SAF uptake by 2030, well above the designed five per cent EU mandate target). (p.30)</p>	Entered first SAF partnership with Neste (p.13)
Airports	Committed to reducing the climate impact of its facilities and its ground operations in Helsinki-Vantaa, and from the beginning of 2023 these operations will be carbon neutral. (p.27)	Electrification of ground handling is underway. Successful introduction of electric turnaround in all airports in Spain, and continuing in other airports (Amsterdam, Oslo,...) (p.15)
Noise emissions	The noise produced by aircraft is mainly engine noise and aerodynamic noise. The level of engine noise is greater in takeoffs, while the level of aerodynamic noise grows during approaches. Finnair has continuously, in cooperation with air traffic control, improved continuous descent approaches (aircraft remains in a smooth continuous descent profile, instead of descending in a series of steps) at Helsinki-Vantaa airport reaching all-time record of 86.3 percent in 2022. (p.27)	The introduction of 73 new Boeing 737-8200's ahead of peak summer 2022 will maintain a high standard with operational noise emissions reductions by up to 40% compared to the Boeing 737-800NG (p.18)

	Finnair	Ryanair
Wastes	<p>In 2019, Finnair set a goal to reduce food waste in the preparation of dishes by 30% by the end of 2022. [...] in terms of kilograms, food and beverage waste was 29% less in 2022 than at the starting level in 2019. (p.28)</p> <p>Finnair's technical services have set themselves the goal of turning aircraft maintenance services into a paperless operation by the end of 2023. Achieving this goal will reduce paper consumption [...] In terms of mass, this means approximately 14 000 kilograms less paper per year. (p.27)</p>	<p>Onboard waste: 2,980,768kg in 2022 and 6,884,813kg in 2020 (p.16). By calculation, between 2020 and 2022, Ryanair has reduced its onboard waste by 43%</p> <p>Partnership with Michelin to recycle tyres. 3.5 tonnes of tyres recycled in 2022 (beginning of the partnership, the amount should increase in the coming years). (p.16)</p>
Waste management	<p>In 2022, approximately 74% of the waste was utilized as energy and approximately 26% of the waste material was either reused, recycled or composted. No waste ended up in a landfill. (p.28)</p>	<p>Wastes either fully incinerated or separated with eligible pieces recycled and the remainder disposed of through incineration or landfill. (p.16)</p> <p>The previously mentioned partnership with Michelin is aiming at having none of the old tires ending up on landfill (p.16)</p>
Single use plastic	<p>Achieved its 2018 goals of halving the single-use plastic products it uses and recycling 50% of all used plastic. In 2018, Finnair's operations generated 466 tons of plastic waste. Now the amount is 150 tons. (p.28)</p>	<p>Have introduced recyclable plastics on over 80% of product lines. Ryanair is ahead of its goal which is to be 100% single use plastic free by 2025. (p.16)</p>

Concerning the “waste” line, the companies do not measure their waste at a similar level, Finnair measures them in the preparation of the dishes for the travellers (before the boarding of passengers), whereas Ryanair measures the waste made onboard, by, and for the passengers. However, it is interesting to see that in a shorter time, Ryanair has been able to reduce these wastes more efficiently than Finnair. On the next line, the gap between the companies is widening, while Finnair transforms the wastes into energy or recycles them, Ryanair incinerates them and recycles some pieces. But most importantly, no waste ended up in a landfill on Finnair’s side, which is not the case for Ryanair, which is making efforts to reduce this, we can see this in their partnership with Michelin.

Finally, concerning the usage of single-use plastic, we can see that both companies are reaching their goals. However, we can note that Ryanair’s goal is much more ambitious than Finnair’s. In the Finnish report, there is no mention of a new goal to continue reducing its usage of single-use plastic, while the Irish company aims at being 100% plastic free in 3 years.

To conclude this comparison, as mentioned in their report, Finnair “aims to be one of the most sustainable airlines in the world” and this statement is in line with what the company is doing and promising its customers. Not mentioned in the previous table, to reduce its emissions activities, the Finnish company has started a cooperation with a climate company to offer a compensation service (or carbon offset program, as mentioned in the literature review) to support renewable fuel and climate projects. In 2022, this program allowed the customers to offset about 3,400 tons of carbon dioxide (which represents 0.15% of the company’s total flying emissions). When comparing Finnair’s marketing and actual business practices, there is some evidence that the company is making efforts to live up to its sustainability promises. The company Ryanair, which has a marketing strategy inclined towards low-cost fares and not the environmental sustainability of the company is also making efforts to reduce their emissions, these actions are in general smaller compared to Finnair, but it seems that the company has been making genuine efforts by implementing recent changes (i.e. the new partnership with Michelin) to compete with its “sustainable” competitors. While Ryanair has

made some efforts to improve its sustainability practices and promote its environmental initiatives, there is still room for improvement.

Overall, both reports were clear in their results (comparison with previous years, goals for the next years, and examples of how actions have been carried out). Ryanair's report was a reader-friendly report with big diagrams, usage of colours to highlight numbers, etc. which sometimes lacked information on what the numbers were representing. On the other side, Finnair's report consists of more text and fewer diagrams than Ryanair, both easily readable and comprehensible. However, a good point to note is that Finnair's report was completed by statements from the company, such as "Finnair has zero tolerance for illegal wildlife trading and is a United for Wildlife-certified airline" (page 26). These statements allow the reader to know where the company stands on certain topics whereas Ryanair is not commenting on these topics.

3.2 Case study of Marriott International and Banyan Tree

Marriott International is a multinational hospitality company that operates over 8 000 properties in 140 countries and territories. The company was founded in 1927 and has its headquarters in Bethesda, Maryland, USA. Marriott operates a range of hotel brands, including luxury brands, mid-range, and budget brands. Marriott also operates vacation clubs, restaurants, and other hospitality-related businesses. In recent years, Marriott has focused on expanding its presence in emerging markets, as well as on sustainability initiatives. While not claiming to be the most sustainable, Marriott promotes their commitment to "making a positive and sustainable impact". Marriott has also implemented the sustainability program "Serve360: Doing Good in Every Direction", which is focused on promoting social and environmental sustainability across its global operations.

Banyan Tree Group is an international hospitality company that operates luxury hotels and resorts. The company was founded in 1994 and has its headquarters in Singapore. Banyan Tree Group has built its reputation on promoting sustainable tourism and responsible travel. It operates over 40 hotels and resorts in more than 20 countries, with a focus on providing sustainable luxury

experiences to its guests. In addition to its hospitality offerings, Banyan Tree Group also operates a range of other businesses, including spas, golf courses, and retail outlets. The company's sustainability commitments are rooted in its philosophy of "Embracing the Environment, Empowering People", which focuses on reducing its environmental impact and promoting social and economic development in the communities where it operates. The company has also implemented several sustainability initiatives across its global operations, such as the "Green Imperative Fund", which supports environmental and social projects, and "Seedlings", a program that educates local communities on sustainable farming practices.

The reports studied are from 2021, the year where the COVID-19 crisis was slowing down, and tourism activity was slowly starting to go back to normal. Due to the crisis and almost no activity for the companies, both companies were witnessing good results in their energy consumption and starting again the activity explains why certain goals are not reached yet or why some numbers can be low compared to the years before the crisis. Comparing both companies when they returned to their pre-covid activity is suggested to have more accurate results.

Table 2. Comparison of Marriott and Banyan Tree's reports for the year 2021.

	Marriott	Banyan Tree
Energy	<p>In 2021, numerous Marriott managed hotels implemented energy efficiency projects, saving approximately 130,000 MWhs of energy. (p.14)</p> <p>At the Amman Marriott Hotel, the property installed a solar hot water system in 2021, which is expected to reduce carbon emissions by over 300 metric tons annually. (p.16)</p>	<p>key performance indicator: a 5% annual reduction in energy, emissions, water and waste at each property, and the implementation of at least one resource conservation initiative per property each year. (p.16)</p> <p>Solar panels were installed at Laguna Phuket Kindergarten to replace half their power supply, and Power Purchase Agreements are being explored across the Group to target eligible properties</p>

	Marriott	Banyan Tree
		based on emissions, and design (p.15)
Carbon reduction goal	<p>2025 Sustainability and Social Impact Goals aims to reduce carbon intensity per square meter of conditioned space by 30% from a 2016 baseline. 2021 result is currently at 25.6%. (p.96)</p> <p>The JW Marriott Washington, DC (Washington, D.C., U.S.) was recognized with the 2021 global Energy Management Leadership award, one of the highest accolades in energy management and conservation, for reducing approximately 725 metric tons of carbon emissions over three years. (p.14)</p> <p>Marriott expects to retire the 2025 carbon reduction goal and move to an absolute carbon reduction goal, as they aim to reach net-zero greenhouse gas emissions by 2050 at the latest. (p.15)</p>	<p>The development of a comprehensive decarbonisation strategy is a priority in 2022. Building on their EarthCheck-audited energy use and Scope 1 and 2 emissions, they will conduct a TCFD-aligned risk assessment under multiple climate scenarios to map risk and opportunity, as a foundation to establish targets and develop a decarbonisation roadmap (p.43)</p>
Renewable energy	<p>As part of the 2025 Sustainability and Social Impact Goals, Marriott aims to source a minimum of 30% of its overall electricity from renewable energy by 2025. In 2021, they enhanced their renewable energy tracking protocols and sourced 0.30% of their electricity consumption from renewable energy. According to the report, they are behind schedule. (p.10 and 17)</p>	<p>Their approach towards decarbonisation and climate change mitigation includes [...] increasing the prevalence of renewable energy. (p.15)</p>

	Marriott	Banyan Tree
Food waste	<p>Eight hotels across Africa and the Middle East reactivated the Winnow food waste solution system. After the systems were reactivated throughout 2021, those hotels reduced an average of approximately 15,300 kg of food waste per hotel per year. (p.21)</p> <p>London Heathrow Marriott launched a series of waste reduction initiatives, including a “Food Waste Laboratory,” to reduce, reuse, and recycle food waste. In one month alone, the hotel reused nearly 400 lbs. (180 kg.) of potential food waste through these practices. (p.22)</p>	<p>Food waste goals are 30% reduction and 50% diversion from landfill by 2025, with 50% reduction and 100% diversion by 2030. Diversion efforts recycled or donated 280.7 tonnes of food in 2021, but temporary closures prevented accurate measurement of the total food footprint of the Group.</p> <p>The property in Ringha purchased three pigs for recycling food waste, and the team in Tamouda Bay partnered with Ekogeste to recycle frying oil into biodiesel. Composting organic waste at their property in Vietnam produced an additional 180 tonnes of natural fertiliser, with a saving of US\$51,662 from purchasing chemical fertiliser. (p.20)</p>
Trees planted	<p>In 2021, Marriott reforested 34 acres by planting 20,000 trees in GreenTrees, the largest North American reforestation program, through its collaboration with the Arbor Day Foundation. (p.26)</p>	<p>In 2021, they planted 9,306 trees.</p> <p>During a month-long campaign, each booking included a US\$1 donation, which they dollar-matched to raise US\$10,300 for The Canopy Project. The contribution enabled The Canopy Project to plant 30,000 trees in Sierra Gorda Biosphere Reserve. (p.16)</p>
Sourcing	<p>2025 Sustainability and Social Impact Goals: 95% responsible sourcing in their top 10 priority categories (animal proteins, cocoa, coffee, guest room amenities, paper products, seafood, sugar, and textiles), measured by total spend.</p>	<p>Their organic farm ORI9IN in Chiang Mai, Thailand, opened the ‘Waiting for May’ picnic restaurant serving field-to-fork sustainable dishes made using locally grown and sourced ingredients.</p>

	Marriott	Banyan Tree
	<p>According to the report, they are behind schedule (p.10)</p> <p>2025 Sustainability and Social Impact Goals: locally source 50% of all produce, according to the report they are behind schedule (p.10)</p> <p>By 2025, Marriott aims to source 100% of eggs from cage-free sources and increase the percentage of spend on responsible pork. This percentage is currently at 15,4% for the eggs and 1,17% for the pork (p.31)</p> <p>More responsibly sourced offerings of other single-use toiletry items such as shaving kits, dental kits, and make-up remover cloths are being reviewed and expected to be ready for purchase by hotels in 2023. (p.20)</p>	<p>To support their understanding of their food supply, they partnered with a Pew Charitable Trust project to better understand Illegal, Unreported and Unregulated seafood in their Phuket supply chain, to learn lessons for implementation in the Group. (p.20)</p>
Water use	<p>2025 Sustainability and Social Impact Goals: reduce water intensity per occupied room by 15% from a 2016 baseline. According to the report, they are behind schedule. 4.7% Global Increase from the 2016 Baseline (Due to occupancy reductions associated with the COVID-19 pandemic) (p.19)</p> <p>Total water consumption: 115.3 million m³ (130.7 in 2016) (p.75)</p>	<p>Total annual potable water use increased by 6%, due to new and reopened operations. However, total water use in 2021 was 18% lower than in 2017. (p.19)</p>

	Marriott	Banyan Tree
Water bottles	Since 2019, The Westin Kuala Lumpur (Kuala Lumpur Malaysia) has worked with EcoPure Waters to remove single-use plastic water bottles from guest rooms and replace them with reusable glass bottles. This program is estimated to eliminate approximately 400,000 single-use plastic bottles annually. (p.20)	Water bottle reductions: 1,765,979 – no indication if it is an annual number or since a starting year. (p.22)
plastic	No single use plastic is targeted for completion in all hotels globally by the end of 2022. The company is also considering implementing large-format bottling options for sink-side soaps and lotions. (p.20)	Compared to a 2017 baseline, they have reduced single-use plastic by 53% (p.21)
Wastes	Hotels are guided to purchase products that can be reused, recycled, composted, or donated to avoid sending waste to landfills. In addition, Marriott focuses on local, state, and national regulations and global waste management trends to guide hotels in making appropriate waste diversion choices. (p.20) 2025 goal: 45% waste-to-landfill (and 50% food waste) reduction from 2016 baseline. According to the report, they are behind schedule (p.10)	Absolute waste production in 2021 was 16% lower than 2017. (p.19)
Certifications	By 2025, they aim to have 100% of their properties certified to a recognized sustainability standard and 650 LEED®, BREEAM®, or	By the end of 2021, 38 sectors including 30 hotels in which they have management or ownership interest were enrolled with EarthCheck. Gold or Platinum

	Marriott	Banyan Tree
	<p>Estidama certified or registered hotels in the portfolio. According to the report, they are behind schedule: 30% of hotels certified to a recognize sustainability standard 227 LEED®, BREEAM®, or Estidama certified or registered hotels. (p.23)</p> <p>In 2022, Marriott's new global corporate headquarters in Bethesda (Maryland, U.S.) achieved LEED Gold Core and Shell Certification. (p.24)</p>	<p>certification has been achieved by 74% of enrolled sectors, while in 2021 the newly enrolled Banyan Tree Huangshan, Banyan Tree Kuala Lumpur and Pavilion Hotel Kuala Lumpur resorts achieved Bronze Benchmarked. (p.17)</p>

After reading and comparison of both reports, at first sight, it appears that Marriott is doing more sustainable actions than Banyan Tree, or when actions are similar, Marriott has a better result. It is for example the case with the trees planted by each group. 20,000 trees were planted by Marriott and 9,306 trees were planted by Banyan Tree. However, it is important to not forget that as seen before, Marriott is a bigger group than Banyan Tree; Marriott has over 8,000 properties while Banyan Tree has 55. If we divide the number of trees planted by the number of properties, we can see that it represents around 2,5 trees planted per hotel for Marriott and around 169 trees planted per hotel for Banyan Tree, the difference is significant. Moreover, Marriott, in its report, shows a multitude of initiatives taken by hotels. However, these actions concern one or a few hotels. When talking about group-wide actions, Marriott only “guides” hotels in making appropriate choices (“waste” row of the table). Overall, Marriott's marketing and actual business practices appear to be aligned when it comes to sustainability. The company has implemented several initiatives to reduce its environmental impact and has received recognition for its sustainability efforts. However, as we have seen, there is always room for improvement.

On the other side, Banyan Tree, with a global vision of the group, lacks information and data on particular topics (i.e. the reduction of plastic bottles). The

group started as a sustainable hotel chain so we can understand that less efforts would be needed to reduce their footprint, compared to Marriott, but because the group doesn't display goals for the next years and absolute data on water, electricity or other consumption, only percentages compared to a 2016 baseline, it is difficult for the reader to be able to compare with other hotels which one is actually more sustainable than the other, the reader will only be able to assess the progress made, which is most of the time, not representative of the actual sustainability of a hotel.

To conclude, both reports show that Marriott and Banyan Tree are making non-negligible efforts to become more sustainable and have a lower impact on the environment. Not cited in the table, they both financially help local organizations to support biodiversity and teach guests about it. However, the fact that Marriott has global goals for 2025 (and is behind schedule for an important part of them) but does not have mandatory actions for all hotels and mostly shows off certain actions that worked well leaves space for the reader to wonder why the group is not taking more actions when it shows that it is possible. The fact that Banyan Tree shows good results (i.e. able to reduce significantly its water usage) but does not go deeper into the details given also makes the reader wonder why more details are not given.

3.3 Case study of Expedia Group and Intrepid Travel

The Expedia Group is a multinational technology company that operates a variety of online travel booking sites. It was founded in 1996 and has its headquarters in Seattle. Expedia offers a range of travel services, including flights, hotels, car rentals, vacation packages, and activities. The company owns brands such as Hotels.com, Expedia.com, and Travelocity. In terms of marketing, Expedia aims at providing "greener options for a greener travel industry" to encourage travellers to make sustainable choices when booking their travel. The company has a website page called "Expedia Group's Travel & Sustainability Story", which highlights its sustainability commitments.

Intrepid Travel is a global adventure travel company that offers sustainable small-group tours. It was founded in 1989 and has its headquarters in Melbourne, Australia. Intrepid Travel's mission is to provide sustainable travel experiences that have a positive impact on local communities and the environment. The company operates tours in over 100 countries. Intrepid Travel has been recognized as a leader in responsible travel and sustainability. The company uses slogans such as “being the best travel company for the world”.

These reports were also published for the year 2021, for the same reasons as seen previously, a further study of the company when back to pre-covid activity is suggested to ensure the accuracy of these results.

Table 3. Comparison of Expedia and Intrepid Travel’s reports for the year 2021.

	Expedia	Intrepid Travel
Carbon neutrality	Since 2017 (p.5)	Since 2010 (p.64)
Power (renewable energy and/or electricity)	<p>100% of electricity matched with renewable purchases (p.5)</p> <p>Reduced the total power consumption of data centers by 3,874 KW through increases in efficiency. Plan to achieve an additional 3,520 KW in reductions by the end of 2023 (p.10)</p>	<p>2025 GOAL: all Intrepid offices will run on renewable energy. In 2021, our Turkey office made the switch to renewables. (p.64)</p>
partnerships	<p>Expedia Group worked closely with UNESCO to establish an industry-first Sustainable Tourism Pledge in 2020. The Pledge encourages signatories to engage with their communities and improve their operations along four pathways: Energy conservation, Water conservation, Waste reduction,</p>	<p>Intrepid’s chairman Darrell Wade attended COP26 in his capacity as Vice Chair of the World Travel and Tourism Council (WTTC) and Chair of the Sustainability Committee to advocate for ambitious industry-wide tourism action on climate change. (p.65)</p>

	Expedia	Intrepid Travel
	<p>Single-use plastics reduction (p.7)</p> <p>Expedia worked with global, industry-leading wildlife and animal-protection groups to review all animal-related activities and removed performances by or interactions with dolphins, whales and other cetaceans from their sites (p.5)</p>	
Emissions breakdown	<p>Scope 1: 24%</p> <p>Scope2: 34%</p> <p>Scope 3: 42%</p> <p>(p.10)</p>	<p>2035 goal: reduce absolute scope 1 (direct emissions) and scope 2 (emissions from heat and electricity) greenhouse gas emissions 71% by 2035 from a 2018 base year. Reduce scope 3 (value chain emissions) greenhouse gas emissions from its offices by 34% per full-time equivalent and from its trips by 56% per passenger day over the same period (p.64)</p>
Certifications	<p>Seattle headquarters: LEED Gold certification awarded in 2021 (p.11)</p>	<p>Intrepid re-certified as a B Corp and improved their score by 10% in the process. (p.13)</p>
Low carbon trips	<p>Eco conscious travellers using their platform will soon be able to book trips with comparatively lower emissions and enhanced sustainability (p.4)</p>	<p>Low carbon trips: From a product perspective, since the start of the pandemic, Intrepid has developed more than 40 new low carbon trips, with a focus on activities including walking, trekking and cycling. Lowering the carbon output from our trips is also supported by the development of our new domestic range.</p> <p>In addition, flights have been removed from five top-selling products in Borneo, Cuba,</p>

	Expedia	Intrepid Travel
		Cambodia, Vietnam and Egypt. (p.64)
Hybrid work	Will return to a 50% hybrid work model in 2022 (p.10)	Flexible and hybrid work will remain a feature (p.64)

Reports from both companies have been interesting to compare. Indeed, there are obvious differences between them. In its report, we can see that Intrepid has goals for the following years (2025 and 2035) and also follows the Sustainable Development Goals (SDG). Not mentioned in the table, the Appendix of this report shows the SDG Action Manager Score, grading how the company does in reaching each goal. Whereas Expedia, which has a broader sustainability program doesn't have a specific strategy (i.e., the vocabulary used such as "soon" but no dates or schedule is given, "we continue to encourage" but no policy is put in place or real actions carried out, the list goes on). Overall, both reports are a representation of companies' strategies and what they market about themselves: Intrepid is marketing its sustainability travels and it shows in the report, they position themselves as leaders in sustainable travel and have taken concrete steps to reduce their environmental impact and support sustainable tourism. On the other side, Expedia is marketing the facilitation of connections between travellers and Expedia's partners but does not focus on eco-sustainable travellers. Expedia's report suggests a new marketing approach for eco-conscious travellers in the future, but no more details are given concerning what the changes will be to answer their needs. Further analysis is suggested to deepen this comparison once the new strategy is launched to examine the changes made and be able to compare both companies to a more similar offer for customers.

4 Conclusion

To conclude, even if companies take steps to improve their sustainability practices and reduce their environmental impact, this desire to surf on the wave of eco-responsibility and sustainability to attract more customers is often driven by their hunger for money, especially for worldwide groups. The incidents previously mentioned demonstrate the importance of transparency and accuracy in green marketing claims. It is important for companies to be able to back up their claims with concrete evidence and to avoid greenwashing customers.

Some of the information published by companies raises questions, as it has been shown in the analysis of the reports. For example, in the aviation industry, especially while replacing old aircraft with new ones. On one side, it is a good thing that companies are modernizing their fleet but on the other side, there is no further information about what is happening to the old aircraft (which are often still in flying condition), are they being recycled? What is the carbon footprint of manufacturing new planes? These are necessary information to communicate to customers.

Finally, ecotourism has a significant impact on the population in the visited countries, a study on tourism in Fiji by Focus quoted in Paul Herbig and Brad O'Hara (1997) was comparing two different villages in Fiji, one dependent on ecotourism and not the other. Here is what they concluded: "It was found that education and income levels were higher in the village which was impacted by ecotourism. These villagers were also seen to have higher or changed expectations with regard to their future." Thanks to ecotourism, more money was brought to the village's economy, and they were able to spend more on imported goods, clothing appliances, the list goes on. However, Paul Herbig and Brad O'Hara (1997) reported that the ecotourism-dependent village had become a victim of alcohol-related disturbances, an issue that was not here before tourists came in and is not a problem in the ecotourism-independent village. Even when companies can be taken accountable for greenwashing customers, it keeps being necessary for travellers to inform themselves about what they are looking for, if it is ecotourism, they should know about its principles to respect them, same goes

for eco-sustainable tourism, and other forms of tourism, but also the impact they can have and how they can reduce it.

To answer the research question “How does green travel influence and impact the tourism industry in the aviation, tour operators, and accommodation fields? How trustworthy is the sustainability marketing of these companies?” It has been concluded that from the six companies studied in the different industries, they all have a sustainability strategy to reduce the impact of their activity. Goals are different from one company to another but are all respected. Overall, we could blame some of them for not doing enough compared to smaller companies that accomplish bigger goals (i.e. The number of trees planted by Marriott and Banyan Tree), or not giving detailed information on the data given, but we cannot blame them for greenwashing customers. Customers turning towards a greener way of traveling have a positive impact on the industries studied. Indeed, Companies need to have a green marketing strategy and promote their sustainable practice and initiatives to be able to attract environmentally conscious customers to position themselves as leaders in the sustainable tourism industry, which leads to an overall greener industry, better for the environment. The author suggests further studies to analyse if customers are attracted to green practices and to which extent, to get a vision on the other side of green marketing.

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