Consumer Demand and Operator Support

for

Socially and Environmentally Responsible Tourism

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Key Findings

Since 2000, the tourism industry has faced multiple international crises: economic recession, the SARS outbreak, terrorist attacks, and the war on terrorism. Despite setbacks to the industry, both consumers and travel companies show strong support for responsible tourism, including a willingness to pay more for ethical practices, to contribute to community projects, and to support certification. While consumers continue to view cost, weather, and quality of facilities as paramount in holiday planning, demand for ethical products, social investment, and eco-labels is growing.

The following sections summarize, under broad topics, the findings from a range of surveys and studies carried out in the US, Europe, Costa Rica, and Australia. Most of the surveys considered have been prepared since 2000. (A longer version of this study is available at www.ecotourism.org).

These surveys show the following key trends:

➢ Consumer Demand for Responsible Tourism: *Strong, growing… but largely passive.*

> *Contrary to some beliefs, most tourists do not simply want to live in a 'sanitized bubble' while on holiday…*
>
> − Tearfund (2000)[1]

- A majority of tourists want to learn about social, cultural and environmental issues while traveling; feel it is important that tourism not damage the environment; and want hotels to protect the environment. However, only a small percentage of tourists describe themselves as "ethical" or actually *ask* about hotel policies; even fewer report changing plans due to responsible tourism issues.

- More than half (53%) of the American tourists surveyed agree that they have a better travel experience when they learn as much as possible about their destination's "customs, geography, and culture."[2]

- Over half (62%) of American tourists surveyed in 2003 say that it is important that they learn about other cultures when they travel.[3]

- In the US, more than three-quarters of travelers "feel it is important their visits not damage the environment," according to a 2003 study. This study estimates that 17 million American travelers consider environmental factors first when deciding which travel companies to patronize.[4] A separate study found that over 80% of American travelers believe it is important that hotels take steps to preserve and protect the environment, but only 14% asked the hotels they use if they have an environmental policy.[5]

- Travel experiences are better when the destination is a well-preserved natural, historical, or cultural site, according to 61% of American tourists surveyed.[6] One in three American travelers is influenced by a travel company's efforts to preserve the environment, history, or culture of the destinations it visits.[7]

- Nearly 91 million US travelers (59%) support controlling access to, and/or more careful regulation of, national parks and public lands in order to preserve and protect the environment.[8]

➢ **Operator Support for Responsible Tourism:**
   Widespread, especially among specialist operators.

- Three quarters of the tour operators surveyed say they have, or are planning to produce, a responsible tourism policy that is designed to educate tourists and/or set operating principles. However, few companies feel external pressure or say their customers proactively ask about social, environmental, and economic issues. Specialist tour operators targeting "green" consumers report that superior environmental performance brings them branding and price advantages, and that guest concern with social and environment issues increases significantly after a trip.

- In a 2001 survey of British tour operators, half (49%) said that they had developed some form of a responsible tourism policy. An additional 26% said that they were planning to produce such a policy in the future. The most popular form was a set of written principles that guided the tour operators' activities. Another popular policy consisted of suggestions for how tourists should behave.[9]

- A survey in Costa Rica found that businesses that routinely have superior environmental performance and target "green" consumers could set themselves apart from their competitors and thus yield price premiums.[10]

- Tour operators who focus on "green" consumers are more likely to participate in voluntary environmental programs because they will benefit from having an environmentally friendly reputation.[11]

➢ **Consumer Willingness to Pay**

- Some 58.5 million US travelers (38%) would "pay more" to use travel companies that strive to protect and preserve the environment. Of these, 61% say they would pay 5-10% more to use such companies.[12] A survey of upscale American travelers revealed that 70% would pay up to $150 more for a two-week stay in a hotel with a "responsible environmental attitude.[13]

- A survey of executives from the US' 2,000 largest foundations found that 80% were interested in hotels' social and environmental practices, and 73% wanted to know similar information about airlines.[14]

➢ **Travelers' Philanthropy:** *Corporate & customer commitment to assisting local communities is growing rapidly.*

- A 2003 study estimates that 46 million US travelers "buy from specific companies because they know that these companies donate part of their proceeds to charities."[15]

- And close to one in three (31%) of American tourists feel it is important that the travel companies they use employ local residents and support the local community.[16]

➢ **Support for Certification:** *Consumer demand, industry improvements & benefits constrained by inadequate marketing & too many labels*

- An overwhelming majority of German domestic tourists, (71.1%) and more than half of the German tourists traveling outside of Germany (59.5%) agreed that an environmental label for tourism is useful. About half of all German tourists (52.8% traveling within Germany, and 46% traveling outside of Germany) reported that they would use an eco-label, if available, in the choice of a vacation.[17]

- In Australia, a 2000 *Tourism Queensland* study found that almost two thirds of visitors surveyed while using a certified ecotourism operation were aware of the eco-label. However, less than one-third said they had known beforehand that the business was certified, and only 24% had heard specifically of the National Ecotourism Accreditation Program (NEAP). The survey concluded that "the current low level of awareness of ecotourism accreditation [certification] in general and the NEAP in particular…could be partially due to ineffective marketing…".[18]

- Operators in Australia say they are most likely to seek certification in order to "evaluate their own business or progress towards achieving best practice in ecotourism." In addition, they view certification as an "opportunity to gain marketing support and differentiation."[19]

- A German study of European tour operators found that most operators "are prepared to implement eco-labels in their products, favoring a label that is valid on a European level."[20]

- A survey within European Union member states found that a majority of respondents favor one eco-label for tourism, rather than a variety of different ones. The study concluded that this presents a great opportunity to introduce a uniform, European-wide eco-label for accommodations.[21]

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[1] Tearfund, "Tourism—an Ethical Issue: Market Research Report," Tearfund, London, January 2000.

[2] Travel Industry Association of America (TIA) and National Geographic Traveler (NGT), "The Geotourism Study: Phase 1 Executive Summary," 2002. Based on 4300 responses to a survey of 8000 American adults, of which 3300 had taken a trip in the past three years.

[3] TIA and NGT, 2002.

[4] Travel Industry of Association of America (TIA) and National Geographic Traveler (NGT). "Geotourism: The New Trend in Travel," press release. 8 October 2003. This refers to the second portion of a two-part survey.

[5] Travelbiz, "Green is good for hotel business," online article. 29 August 2002. http://www.travelbiz.com.au/articles/14/0c010614.asp. References a 2002 study by Small Luxury Hotels of the World.

[6] TIA and NGT, 2002.

[7] *Ibid.*.

[8] *Ibid.*.

[9] Tearfund. "Tourism-putting ethics into practice." Tearfund, London, January 2001.

[10] Jorge Rivera, "Assessing a voluntary environmental initiative in the developing world: The Costa Rican Certification for Sustainable Tourism," *Policy Studies,* vol. 35, 2002.

[11] Rivera, 2002.

[12] TIA and NGT, 2003.

[13] Travelbiz, 2002.

[14] Business Enterprises for Sustainable Travel (BEST), " Update 2001," 2001. Available at www.sustainabletravel.org

[15] TIA and NGT, 2003.

[16] *Ibid*.

[17] Christian Hildebrand, "Probleme, und Tendezen bei der Entwicklung eines einheitlichen Unweltgutezeichens fur das Hotel, und Gaststattendewerbe, Diplomarbeit, Fachhochshule Munchen, Studiengang Tourismus," Mai 2000. Zusammenarbeit mit Herbert Hamele, "ECOTRANS," unpublished. 2000. Referenced in FEMATOUR, 2000.

[18] Enhance Management, "NEAP Consumer Survey: August 2000," prepared for Tourism Queensland. Survey respondents were visitors to tourism operations in Queensland that have been certified under the National Ecotourism Accreditation Program (NEAP), Australia's leading ecotourism label. In Australia, "accreditation" is the terminology used instead of "certification."

[19] Enhance Management, "NEAP Industry Survey: August 2000," prepared for Tourism Queensland. This survey involved interviewed with 94% of all Australian operators certified by NEAP. Over half had been certified for two years, while more than one-third had been certified for three years or more.

[20] ECOTRANS, 2000 and Hildebrand and Hamele, in FEMATOUR, 2000.

[21] FEMATOUR, 2000.