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# Travelers' Philanthropy

Helping Communities Build Economic Assets &  
Sustain Environmental & Cultural Resources in an  
Era of Rapid Globalization



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## Executive Summary

In all regions of the world, a new source of international development aid called "Travelers' Philanthropy" is evolving. Civic-minded travelers and travel businesses are giving time, talent and financial resources to further the well-being of the places that they visit.

Guests at a resort in the Yasawas Island chain (Fiji), for example, volunteer their professional talents to staff health clinics and make cash contributions to develop a health center and secondary school. Visitors to eco-lodges in southern and central Africa contribute to environmental restoration and land equity initiatives, primary education, and micro-enterprise development. Clients of a Colorado-based tour operator support the vocational education of Burmese orphans, while shipboard travelers to the Galapagos Islands help preserve one of the planet's most unique and fragile ecosystems.

In many cases, gifts are channeled through the offices of newly formed foundations operated by multisector partnerships that include businesses, nongovernmental organizations, and community leaders. Together, they are advancing local social justice and development efforts and helping to expand civil society in under-resourced communities around the globe.

### Why Travelers' Philanthropy Is Important

There is every reason to believe that this movement is desperately needed and destined to grow exponentially, benefiting from trends in giving, travel, and globalization.

Growth in both giving and travel are two of these dominant trends. By 2020, charitable giving by Americans alone will exceed \$300 billion. Travel is also growing and is now the largest single segment of the world economy. Tastes in travel are changing, with sustainable and heritage travel becoming increasingly popular. Destination preferences are also shifting. Of the top 40 tourist destinations, 11 are in developing countries.

At the same time that globalization is on the ascendancy, the percentage of gross domestic product that the United States gives to developing countries continues to decline.

Travel is clearly an indispensable aspect of globalization and has the potential to reduce the staggering economic inequalities of the contemporary world and accelerate environmental and cultural damage:

- Almost half of the world's population lives on less than two dollars per day
- The AIDS epidemic is now threatening the economic prospects of whole countries in Africa, Asia, and elsewhere
- Government aid to developing countries has fallen
- In the foreseeable future most of the world's population will not know nature in any direct way
- In the United States, 19 percent of native animal species are imperiled

Increasingly, partnerships that include individuals, companies, civic institutions, and NGOs are needed to augment governments' efforts. Travelers' Philanthropy encourages the development of such partnerships and

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creates a new stream of economic assistance dollars in locales where the need to build local assets and conserve natural resources is high.

## *How to Build the Travelers' Philanthropy Movement*

The Center on Ecotourism and Sustainable Development (CESD), a joint project of Stanford University and the Institute for Policy Studies, has mapped out a long-term vision for the emerging Travelers' Philanthropy movement and a concrete plan to implement this vision within the next decade.

The vision is quite simple though not simply attained: *An ethos of reciprocity is firmly established in the travel and tourism industry and among a majority of travelers worldwide, significantly increasing support for human and economic development, environmental conservation, and cultural preservation where the need is great.*

In November 2001 and September 2002, the Business Enterprises for Sustainable Travel (BEST) convened the first two Travelers' Philanthropy summits of practitioners and other experts. These gatherings identified and advanced exemplary programs, promoted the movement before key industry gatherings worldwide, and begun to spread the word about Travelers' Philanthropy in major consumer and business periodicals. It has also sponsored the development of a working group of 25 leading Travelers' Philanthropy program operators and supporters drawn from the worlds of organized philanthropy, conservation, and cultural preservation. In mid-2003, CESD assumed the leadership of Travelers' Philanthropy and began preparations for a third and larger conference to be held at Stanford University, April 12-15, 2004.

The objectives fall into four goals:

1. Mobilize travel industry investment in the movement
2. Motivate travelers to become destination philanthropists and stewards
3. Create a positive policy climate for the movement
4. Enhance the capacity of community-based philanthropic entities

Chapter 4 outlines actions necessary for expanding the movement, involving basic research, communication and educational activities, collaborations, and new program development. These initiatives are proposed in the strong belief that Travelers' Philanthropy can be a significant force for social good and a potent new strategy for funders interested in advancing social justice, economic development, biodiversity and environmental protection, cultural preservation, volunteerism and philanthropy, and lessening some of the inequities resulting from globalization—or for programming initiatives that cut across two or more of these domains.

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## Chapter 1

# A Promising and Timely New Philanthropic Movement Emerges

In all regions of the world, a new source of international development assistance is evolving: informal partnerships among civic-minded travelers, leaders in destination communities, and owners of forward-looking travel businesses with innovative programs that encourage giving to address local needs. These partnerships are empowering local and indigenous peoples and communities by providing job skills, business and home ownership, real power in project governance, and lasting improvements in health care, education, and environmental stewardship.

Guests at a resort in the Yasawas Island chain (Fiji), for example, volunteer their professional talents to staff health clinics and make cash contributions to develop a health center and secondary school. Visitors to eco-lodges in southern and central Africa contribute to environmental restoration and land equity initiatives, primary education, and micro-enterprise development in several of the continent's poorest countries. A tourist bureau in New Orleans links travelers to local Habitat for Humanity projects, while an American tour company spearheads volunteer national park cleanup campaigns by its employees and guests. Clients of a Colorado-based tour operator support the vocational education of Burmese orphans, while shipboard travelers to the Galapagos Islands help preserve one of the planet's most unique and fragile ecosystems.

All of these "on the road" donors and countless others, as well as scores of businesses worldwide, are participating in an emerging voluntary movement called "Travelers' Philanthropy." Simply put, these individual and business pioneers are giving gifts of cash, time, talent, and capital, as well as economic patronage, to help local communities develop and protect their economic, cultural, and environmental assets.

In many cases, gifts are channeled to development and stewardship projects through the offices of newly formed foundations operated by multisector partnerships that include businesses, nongovernmental organizations, and community leaders. Through entities like the Yasawas Community Foundation, The Africa Foundation, and the Galapagos Conservation Fund, just to mention a few, individuals and businesses are advancing local social justice and development efforts and helping to expand civil society in under-resourced communities around the globe.

### *Benefiting from Trends in Giving and International Travel and Tourism*

There is every reason to believe that the movement will grow exponentially. Individuals represent the largest single source of philanthropic dollars. In the United States, they contributed 76 percent of all charitable dollars in 2001, as compared to 12 percent from foundations, 4 percent from corporations, and approximately 8 percent from bequests. By 2012, individual charitable giving will increase by \$100 billion to exceed \$300 billion.

And individuals all over the world are traveling more, making them a powerful economic force by virtue of sheer numbers. The World Tourism Organization, a United Nations-affiliated research and support organization, reports that international tourism has increased nearly 28-fold since 1950.<sup>1</sup> International tourism is expected to double again, reaching 1.6 billion international tourist arrivals by 2020.<sup>2</sup> In 2001, travel and tourism represented perhaps the largest single sector of the world economy, contributing 11 percent of global GDP, 8 percent of all jobs, and 9 percent of all capital investment, according to the World Travel and Tourism Council.<sup>3</sup> These

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numbers do not take into account tourism-driven expansion in others sectors such as agriculture and construction. Although the travel industry was depressed immediately after the terrorist attacks of September 11, 2001, and the war in Iraq, over the long term, travel and tourism are expected to resume their rapid growth.<sup>4</sup>

Travelers' preferred destinations are in fact changing in ways that potentially favor global economic development and preservation aims. While travel to Europe and North American has declined, visits to Africa, Asia, and other destinations in the developing world have increased sharply in the last quarter century, and one in every five international tourists now travels from an industrial country to a developing one, up from one in 13 in the mid-1970s.<sup>5</sup>

More than two-thirds of the approximately 200 million jobs created by tourism per year are in the developing world, and tourism is the only sector where developing countries run trade surpluses.<sup>6</sup> Translating these figures into geographic terms, the Overseas Development Institute reports that in 1998 of the top 40 tourist destinations worldwide, 11 were in poor countries, and of the poorest 100 countries, over half had a growing or significant tourist industry.<sup>7</sup> "For the world's 49 so-called least developed countries, most of which are in Africa or Asia, tourism is one of the few ways to actually participate in the global economy," according to Lisa Mastny, author of "Traveling Light: New Paths for International Tourism."<sup>8</sup> Even within the United States, Native American communities, small southeastern towns with indigenous craft traditions, and urban African-American, Asian-American, and Latino neighborhoods with rich cultural histories are all experiencing a marked increase in visitors.

## Responding to Changing Consumer Demand

Travelers' choices signal a significant shift in attitudes. A recent study of American travelers undertaken by the Travel Industry Association in collaboration with the *National Geographic Traveler Magazine* found that:

- More than 47 million travelers believe it is important that travel companies they use employ local residents and support the local community.
- More than 55 million travelers exhibit a high degree of commitment to travel that protects the local environment, engages visitors in the local culture, and returns benefits to the community.
- Sixty-one percent of travelers agree that their travel experience is better when the destination preserves its natural, historic, and cultural sites and attractions.
- Seventy-one percent indicate it is important to them that their visits to destinations do not damage local environments.

These shifts in travelers' interests are leading to major changes in the tourism industry in the United States and abroad. Heritage tourism, for example, which exposes visitors to local cultures and history, is projected to be a \$200 billion industry by 2005. Eco-lodges are one of the fastest growing sectors of the lodging market, and major travel guides such as *Lonely Planet* and *Let's Go!* are adding extensive information about "sustainable travel" opportunities to their books.

These developments attest to travelers' interest in life-enhancing, transformational travel. At its best, travel can offer people the opportunity to change: to look outside themselves, past preconceived notions and cultural conditioning. Travel also provides the rare opportunity to witness firsthand the beauty and fragility of other societies, cultures, and natural systems. Such experiences generate strong philanthropic impulses. Well-established Travelers' Philanthropy programs report that fully half of their guests participate, and those with

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sophisticated donor communications programs note steady and dramatic increases in guest donations. The emerging Travelers' Philanthropy movement is channeling these gifts toward economic development and preservation in many of the places where the need is greatest.

The importance of these new revenue streams and philanthropic vehicles cannot be overstated. Nearly one quarter of the world's people still live in extreme poverty. Many of their languages, customs, and cultures are at risk of extinction. Sixty percent of the world's coral reefs are threatened with destruction, and approximately 100 species are lost every day. In addition, civil conflict is triggering mass human migrations that destabilize fragile communities and natural environments. The grassroots organizations that are on the front lines of addressing these challenges rarely receive directly any of the billions of dollars in development assistance that are channeled through governments and nongovernmental organizations. As a result new resources, solicited and administered locally for locally defined priorities are desperately needed.

### *Supporting the Growth of Travelers' Philanthropy*

In 2001 and 2002, two meetings were convened consisting of program operators and other experts which identified and advanced exemplary programs, promoted the movement before key industry gatherings worldwide, undertaken research and curriculum development initiatives, and begun to spread the word about Travelers' Philanthropy in major consumer and business periodicals. A third such conference is scheduled to be held at Stanford University in Palo Alto, California in April 12-15, 2004.

This paper summarizes the great international challenges that Travelers' Philanthropy is helping to address and makes clear how model Travelers' Philanthropy programs are addressing them in many communities worldwide. A preview of the larger, long-term vision for Travelers' Philanthropy is also presented to illustrate what this rapidly growing initiative could contribute in the next ten years. The many collaborators believe that Travelers' Philanthropy can be a significant force for social good and a potent new strategy to advance social justice, economic development, biodiversity and environmental protection, cultural preservation, volunteerism and philanthropy, and lessen some of the inequities resulting from globalization.

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## Chapter 2

# Needs and Opportunities in an Era of Rapid Globalization

The well-being of most of the Earth's people is imperiled by what economist and Nobel Laureate Amartya Sen calls "the staggering economic inequalities that characterize the contemporary world."<sup>9</sup> There is general agreement that our environmental systems are also imperiled—by both extreme degradation and outright extinctions.

### *Disturbing Economic and Environmental Trends*

According to the United Nations Development Program's *2002 Human Development Report*, 23 percent of the world's peoples live in extreme poverty. By contrast, the richest 5 percent have incomes 114 times those of the poorest 5 percent. Put even more starkly, 25 percent of the world's people receive 75 percent of the world's income, and of the world's 6 billion people, 2.8 billion, almost half, live on less than two dollars a day, according to the World Bank's 2000-2001 World Development Report.<sup>10</sup>

Although infant mortality rates dropped from 96 to 56 per 1000 lives births from 1970 to 1990, respectively, more than 30,000 children around the world die from preventable disease. In addition, child immunization rates have fallen below 50 percent in Sub-Saharan Africa. Statistics on people with low incomes, especially women suffering from high rates of preventable reproductive health problems, and the HIV/AIDS epidemic increasingly reflect global disparities in earnings, education, and health care. The spread of HIV/AIDS is now threatening the economic prospects of whole countries in Africa, Asia, the Caribbean, and elsewhere.

Economic prospects are also at risk because of educational inequities. Over 854 million people are illiterate, and 113 million school-aged children are not in school. Such poverty, along with civil conflict, triggers mass human migrations that destabilize fragile communities and natural environments (experts estimate that during the 1990s the number of refugees and internally displaced persons grew by 50 percent).

Despite these disturbing trends, governmental aid to developing countries has fallen. For example, in Africa it was halved in real terms over the past decade from \$39 to \$19 per capita; for the Philippines it fell from \$25.50 to \$7.60. Distribution patterns of existing aid are also problematic; little aid flows directly to community-based efforts that are working in collaboration with other local stakeholders to reverse these trends.

As the world produces greater economic gains for a comparative few, it is becoming more impoverished biologically and culturally, say experts. In "The Future of Conservation," Steven Sanderson, president and chief executive officer of the Wildlife Conservation Society, has assembled a host of widely accepted scientific facts that paint a dramatic picture of receding biological and cultural diversity:

In the foreseeable future, most of the world's population will not know nature in any direct way. The cultural traditions and languages of peoples dependent on large natural ecosystems will disappear. . . . Within a few decades, orangutans, Asian elephants, Sumatran tigers, Chilean flamingos, Amur leopards and many other

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well-known species will likely disappear. . . .Untouched wild places have now shrunk to one-sixth of the Earth's land surface.<sup>11</sup>

*The State of the Nation's Ecosystems* brings this picture closer to home. Its exhaustive survey of the status of critical ecosystem health indicators in the United States reveals that:

- Since European settlement, the area of both forest, grasslands, and shrublands has declined by about a third; the area of wetlands has declined by more than one half.
- About half of all natural lands in urban and suburban areas are in patches smaller than ten acres.
- The amount of nitrogen carried by the Mississippi River, which drains 40 percent of the lower 48 states, has tripled since the 1950s.
- Thirteen percent of streams and 26 percent of groundwater tested had at least one contaminant at a concentration that exceeded human health standards.
- About 19 percent of native animal species and 15 percent of native plant species are imperiled.<sup>12</sup>

## *Globalization and Change*

Common sense suggests that reversing these trends will require limiting globalization's negative effects while at the same time "exploiting" its great economic and technological powers to create social good. "The main issue," says Amartya Sen, "is how to make good use of the remarkable benefits of economic intercourse and technological progress in a way that pays adequate attention to the interests of the deprived and the underdog."<sup>13</sup> Ensuring distributional fairness, according to Sen and others, will entail far-reaching institutional reforms to alter laws and other public policies governing international trade, epidemiology, land reform, microcredit initiatives, technological dissemination, education, and the environment.

Others argue that new extra-governmental partnerships will also be necessary. "Private society—individuals, companies, civic institutions, and conservation NGOs—must share in the design of a sustainable future," says Sanderson. The most propitious circumstances for such work will be "well-designed development-assistance programs at out-of-the-way rural places, especially where poverty and conservation collide," he says.<sup>14</sup>

This is precisely the locus of most Travelers' Philanthropy programs, operating as they typically do through partnerships with businesses, individuals, and NGOs primarily in locales where the need to build local assets and conserve natural resources is high. They also bring together the world's most affluent people with its poorest with obvious mutual benefits.

This section offers brief descriptions of Travelers' Philanthropy programs that both illustrate the nature of this emerging field and its promise as a strategy to create new economic assets and conserve vulnerable cultures and natural systems.



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## Chapter 3

# The Many Faces of Travelers' Philanthropy

Scores of Travelers' Philanthropy programs now exist across the globe, representing every sector of the travel and tourism industry. Many of these initiatives have been created by small and medium-sized tour operators, lodging companies, nongovernmental organizations, or multinational corporations others have been created by corporations like American Express, British Airways and American Airlines. Motivations for engagement vary from pure altruism to practical business considerations. Some industry innovators see their efforts as an extension of their civic values while others see them as a way to build customer loyalty. Others have embarked on health and education for their local workforce to ensure lower absentee rates and more skilled employees. Some simply want to protect the local environment in order to safeguard their business investments.



### *Turtle Island Resort and Yasawas Community Foundation (Fiji)—a Comprehensive Model*

An exclusive resort operating in the Yasawa Island chain of Fiji, Turtle Island Resort has developed an extensive and sophisticated model. Begun soon after the resort was opened in 1980, its Travelers' Philanthropy program has gradually evolved to address a wide variety of local community problems: extreme environmental degradation, low literacy rates, poor health and dental care, little community ownership of local businesses, and a long history of poor communication between remote villages and family clans (*mataqalis*) that hindered prior community development efforts.

Resort owners have created the Yasawas Community Foundation, which channels charitable funds to village chiefs to address many social needs. The foundation currently has assets in excess of \$200,000 US and typically receives \$20,000 to \$30,000 US annually in donations from guests who are primarily American. The trustees of the foundation allocate approximately \$10,000 US in annual income to local projects, which principally have been educational in recent years. The chiefs indicate their priorities through their participation on the trustee board.

Turtle Island's Travelers' Philanthropy program has even motivated several guests to return regularly to provide free health and dental care in special recurring clinics. As a result, all children in the surrounding community are now benefiting from four annual dental visits. To combat high rates of blindness from sea glare and diabetes, the resort's program has also established eye care clinics that deliver routine care as well as eye surgery for serious problems. A health center is now in the planning stages. To address the lack of secondary education in the community, the program is also focusing on the development of a secondary school that can accommodate 100 students. To boost school attendance, the program provides transportation and gives cash incentives to parents who keep their children in school.

Job and economic development are also priorities. As the largest employer in the area, the resort trains and employs local residents in skilled wood working as well as in bar and restaurant vocations. Acting as a social

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entrepreneur, it has loaned \$550,000 US (interest free) to enable two villages without any means of job creation to build and develop a now highly successful budget backpacker lodge that employs over 65 villagers. One lodge has a 90 percent occupancy rate while the other is building toward that rate. Both provide benefits through employment and through patronizing local seafood and agricultural businesses. They also provide authentic cultural experiences to guests.

Turtle Island has also spearheaded the development of the Nacula Tikina Tourism Association, largely to help locally owned tourist businesses sell themselves. This has enabled the branding of the Yasawas area in an unprecedented way. The association has also successfully negotiated a travel business code of conduct, which put an end to poor environmental practices by local lodges such as over-fishing and gray water pollution. A greater awareness of intergenerational equity has also developed.

Turtle Island Resort makes elaborate efforts to introduce clients to its 156 Fijian staff members and their culture by incorporating Sunday choir sings, traditional dances, and feasts (*lovos*) into guest activities. It also provides authentic experiences for guests like reef walks and medicinal plant tours.

These points of connection inspire volunteer engagement and philanthropy from approximately half of all guests. “We are constantly talking to guests and potential guests about what differentiates us from other resorts,” says Richard Evanson, the resort’s owner and founder. “We are not just a five-star resort with 14 beaches. The heart of this place truly beats for the welfare of the local people.



### *Conservation Corporation Africa (CC Africa) and The Africa Foundation (AF), South Africa—An Example of Widespread Model Replication*

CC Africa, a South Africa-based safari company, and its now independent community foundation, The Africa Foundation, got their start in Travelers’ Philanthropy when it established Phinda Resource Reserve in Kwazulu Natal, South Africa (1992). The guiding vision of the enterprise was to harness the resources of safari lodges and game preserves to improve the lives of rural Africans living nearby. The foundation was established to distribute charitable gifts from lodge clients and corporations to support a wide variety of health, education, and community development projects.

The three communities that border Phinda—Nibela, Mduku, and Mngqobogazi—have a combined population of 30,000. Household income in the area is roughly \$25 per month, and almost a third of the population has HIV/AIDS. Phinda Lodge and foundation staff have built strong relationships with community leaders and have launched a variety of programs over more than a decade: building whole schools and individual classrooms, providing educational scholarships, training students in lodge hospitality careers, donating medical supplies and equipment, carrying out AIDS prevention programs, engaging locals in environmental education, and funding micro enterprises.

The Africa Foundation now has 56 projects inspired by the Phinda model in five African countries: South Africa, Kenya, Tanzania, Zanzibar, and Zimbabwe. Newer programs have been added, including clean water and land equity initiatives, as well as sports and cultural programs. The foundation values the role of conservation in the African continent’s economic future and believes the people who live closest to the land must be involved in conservation efforts.

Annual guest gifts total \$300,000 to \$600,000 US. As of 2001, The Africa Foundation had raised \$1.2 million US in donations, 90 to 95 percent of which came from lodge guests. Phinda and other lodges also buy charcoal, recycled paper, and crafts from village enterprises.

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In addition to soliciting donations and patronizing local businesses, CC Africa/AF invites guests to get directly involved in local projects and offers guidance based on grassroots connections and knowledge of community needs. Lodge guests Christine and Ray Menard, for example, entrepreneurs from Minnesota (Express Personnel and 3M, respectively) are responsible for expanding and improving classrooms at the Lepesi Primary School in Mpumalanga, South Africa, located near CC Africa's Bongani Lodge. They return twice a year to donate their time and skills. Many of their relatives, friends, and fellow employees have subsequently joined them in making charitable gifts of goods and services and volunteering in the village.



*Lindblad Expeditions and the Galapagos Conservation Fund (GCF--Ecuador) —Combining Adventure with Environmental Preservation.*

Founded in 1979 by Sven-Olof Lindblad, Lindblad Expeditions now provides travel experiences to 12,000 guests annually around the world. Tours to the Galapagos Islands account for more than 20 percent of Lindblad's overall business. In 1999, more than 3,000 guests were introduced to the Galapagos on 45 expeditions aboard the 80-passenger *Polaris*.

One of the most unique ecosystems in the world, the Galapagos Islands have become an increasingly popular tourist destination. Without adequate stewardship, the islands' rich natural resources are at risk of degradation by tourists and invasive flora and fauna, as well as the fishing industry.

To encourage their guests to give to environmental projects, the company has developed a sophisticated communications program. A crew of experts with extensive knowledge of the islands' natural and cultural history prepares passengers for their arrival in the Galapagos through a series of onboard films, slide shows, and lectures. Printed materials are handed out to passengers once on board, and they also come in contact with large on-deck environmental exhibits and reference materials in the ship's library. Excursions and offshore snorkeling, as well as interactions with locally trained Ecuadorian naturalists, deepen passenger understanding of the islands' beauty and fragility. Lindblad himself addresses the guests toward the end of their journey to express his passion for and commitment to environmental preservation. The night before landing, guests are provided with a direct solicitation envelope and offered a discount coupon of \$250 on future Lindblad excursions in return for charitable contributions of \$250 or more.

Since 1997, guests have contributed close to \$1 million US to the Galapagos Conservation Fund, created by Lindblad himself and administered by the Charles Darwin Foundation, Inc., an international Washington-based nonprofit organization. Proposals to the GCF are submitted both to the Galapagos National Park and the Charles Darwin Research Station for their review. A board of internationally respected and locally knowledgeable conservation leaders make funding recommendations.

Lindblad and his company provide substantial cash and in-kind contributions: delivering free consultation to local communities on economic, environmental, and tourism issues; utilizing local vendors; and ensuring outstanding waste management practices on company vessels.

Funded initiatives have included the removal of feral pigs from Santiago Island, combating illegal commercial fishing, and environmental education for local residents. The fund has also begun a program to increase awareness of sustainability among local high school leaders, initiated a preliminary evaluation of training needs of the fishing industry, and supported the first phase of a socioeconomic study of fisherman which will inform the development of a program for participatory management of lobster fishery. The fund is also exploring ways of engaging fishing cooperatives in more sustainable practices.

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## Some Other Noteworthy Initiatives

**New Orleans Metropolitan Convention and Visitors Bureau**, which enlists large convention groups to forgo dessert and gift the saved money to local nonprofits. They have used charitable contributions to start a “Second Helping” food redistribution program that provides unused food from caterers to 40 local organizations in low-income communities and have linked travelers with volunteer opportunities at local Habitat for Humanity projects.

**AsiaTranspacific Journeys**, which helps to “lift up” orphaned Burmese children who are stigmatized as the lowest and are often the most neglected class of citizens in their country. The company supports centers that teach job skills—through contributions from company revenues and charitable gifts from clients. “If you have computer skills and English, you will have a real chance of employment in Bangkok,” says company owner, Marilyn Staff.

**Tauk World Discovery**, which engages its employees and customers in volunteer projects to clean up national parks visited by its tours. It is incorporating hands-on volunteer activities in its travel itineraries to promote more authentic engagement with local communities.

## Common Elements

Though their size, emphasis, and methodologies may differ, Travelers’ Philanthropy programs share a number of common features. They

- Promote face-to-face, authentic connections between people of different cultures
- Solicit donations and determine needs and projects at the local level
- Enable local residents to get involved in funding allocation and governance
- Generate a new stream of cash, goods, and volunteer services
- Establish new partnerships between local businesses and nonprofit organizations
- Engage individual donors—the greatest single source of philanthropic dollars
- Channel resources to grassroots efforts
- Offer a new framework for constructive internationalism and global community-building, as well as cultural and environmental stewardship
- Occur commonly in destinations where the need for economic development and humanitarian assistance is high

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## Chapter 4

### Developing the Field: A Plan for the Next Decade

The following is a long-term vision for Travelers' Philanthropy. Together with implementation goals, desired outcomes, and initiatives needed to develop the emerging field this can become a reality.

It should be noted that a substantial infrastructure to support the adoption of Travelers' Philanthropy programs already exists in most parts of the world. This infrastructure includes community foundations; local nonprofits already working to protect the environment, enhance livelihoods, and restore the cultural heritage of tourist destinations; chambers of commerce; and destination marketing organizations sponsored by local businesses and governments.

Major foundations and international institutions such as UNEP, UNICEF, IMF, the World Bank, and the Inter-American Development Fund are also logical partners in a worldwide program. In fact, many are already involved in activities that promote business and community partnerships, economic development, and environmental and cultural conservation.

#### The Long-Term Vision

*An ethos of reciprocity is firmly established in the travel and tourism industry and among a majority of travelers worldwide, significantly increasing support for economic development, environmental conservation, and cultural preservation in most major destination communities. The giving of volunteer time, charitable gifts, talents, and economic patronage "on the road" becomes commonplace, and a majority of tourists—with the support from the travel and tourism industry, and its partners—are seeking ways to act on their civic values when they are away from home. Effective business-based programs and partnering charitable entities proliferate with the help of widely available technical assistance and a supportive policy climate. The new field has a significant presence in travel literature, the mass media, and in forums that attract both individual donors and philanthropic institutions.*

##### *Four Goals:*

- 1: To mobilize travel industry investment in Travelers' Philanthropy*
- 2: To educate travelers and motivate them to become destination philanthropists and stewards.*
- 3: To create a positive policy climate for Travelers' Philanthropy initiatives*
- 4: To enhance the capacity of community-based philanthropic institutions worldwide*

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*Goal 1: To mobilize travel industry investment in Travelers' Philanthropy*

**Desired Outcomes:**

**Growth** Successful implementation of this goal would result in rapid growth in the numbers of businesses requesting information about Travelers' Philanthropy, attending Travelers' Philanthropy "summits" and training programs, and developing Travelers' Philanthropy programs. The actual number of nonprofits, community foundations, and other charitable organizations involved in Travelers' Philanthropy programs would multiply, and many convention and visitors' bureaus would incorporate Travelers' Philanthropy programming into their routine activities and initiatives.

**Research** Standards and benchmarks defining comprehensive model programs (for organizations of different sizes)—developed through collaboration with business, consumer groups, and travel-related associations—would be available and widely adopted. Major travel and tourism associations would be party to standard and benchmark development and would promote them routinely among their member organizations. Extensive data about the social and business impacts of Travelers' Philanthropy programs would be available to program operators and prospective operators.

**Communication/Education** "Template" communication materials incorporating the standards would be available and widely used by businesses to educate themselves and their customers about how to practice good Travelers' Philanthropy.

All major university programs in hospitality, travel, and tourism would have core curriculum in Travelers' Philanthropy and thus educate a new generation of tourism professionals who would understand and be committed to its support.

**Major Past and Current Initiatives Addressing Goal 1**

In November 2001, BEST convened the first ever summit on Travelers' Philanthropy. The summit brought together businesses and community foundations pioneering this emergent form of "on the road" giving. In September 2002, BEST convened a second summit on Travelers' Philanthropy that gathered 25 pioneers in the emerging field, including representatives from major travel-related businesses, foundations, as well as conservation, peace, and cultural organizations (at White Oak Plantation, Jacksonville, Florida, under the aegis of the Howard Gilman Foundation). In addition to sharing exemplary practices, summit participants formed a working group . In mid-2003, after CESD assumed the leadership role in organizing and running Travelers' Philanthropy, members of this core working group became its advisory board.

**Proposed Initiatives to Address Goal 1**

**Research** Commission further research to:

1. Refine basic Travelers' Philanthropy definitions, standards, and evaluation benchmarks
2. Begin field evaluation to determine social and business impacts
3. Further identify exemplary practices

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4. Identify and survey prospective practitioners and other field constituents

Complete and disseminate a definitive directory of Travelers' Philanthropy programs

**Communication/Education** Build capacity of travel and tourism companies to mount successful programs to:

1. Develop and maintain on-line knowledge clearinghouse for practitioners
2. Develop and conduct ongoing training for business practitioners in
  - a. donor development and motivation
  - b. donor retention
  - c. fund-raising
  - d. communication
3. Create adaptable communications strategies and materials:
  - a. "starter kits" to help practitioners begin programs
  - b. a media relations "starter kit" to help the emerging field of Travelers' Philanthropy engage the media and recruit constituents from the donor and business world
  - c. training materials to help practitioner businesses develop new foundations to channel program gifts
4. Continue key domestic and international convenings and summit participation and expand its capacity to provide technical assistance
5. Complete core curriculum-building and dissemination activities for university-based programs in Travelers' Philanthropy
6. Create templates and protocols to help practitioner businesses, community foundations, and convention and visitors bureaus build operating relationships with each other
7. Sustain an "on-site expert training team" that can be deployed to help fledgling Travelers' Philanthropy programs get up and running.
8. Plan a third Travelers' Philanthropy summit to be held in April 2004 at Stanford University, Palo Alto, CA, and create speaking opportunities before philanthropic and travel conferences

**Pilot Program Development** Increase the number of pilot programs in community tourism and disseminate results of current pilot programs.

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Goal 2: To educate travelers and motivate them to become destination philanthropists and stewards

**Desired Outcomes:**

**Growth** The number of donor tourists would increase dramatically, and travelers would act on a broad range of giving options. More visitors would develop enduring relationships with destination communities—increasing their gifts and making repeat visits—and revenue streams to further economic development; environmental and cultural preservation would increase markedly in major travel destinations.

**Research** Comprehensive and authoritative data would be available to illuminate the needs and preferences of potential travelers, to reflect exemplary practices in the emerging field, and offer outcomes of interest to opinion leaders and policy makers.

**Communication/Education** Business programs encouraging Travelers' Philanthropy would have quality communication materials available to use with their customers; donor education programs would become commonplace. The mass media would cover Travelers' Philanthropy extensively, and mass-market travel coverage of all kinds would be infused with sustainable tourism messages and feature exemplary practices. Clear simple messages advocating Travelers' Philanthropy (the "ethos of reciprocity in travel and tourism") would be embedded in American culture and in travel literature worldwide.

**Major Past and Current Initiatives Addressing Goal 2**

**Research** Everyone recognizes the importance of providing opinion leaders and practitioners with concrete data on consumer demand. It works with a variety of travel industry partners to develop surveys to provide these valuable statistics. The two *Geotourism surveys*, conducted in 2002 and 2003 by *National Geographic Traveler* and the Travel Industry of America (TIA), provide detailed information about the shifting attitudes and behavior of American travelers.

**Communication/Education** Educate travelers through a diverse array of media venues: an ongoing column in *National Geographic Traveler* (readership: 4 million), St. Martin's Press *Let's Go!* travel guide series (35+ different guidebooks), articles in select publications such as *Environmental Grantmakers Association Newsletter*, *PATA Compass Magazine*, the *National Hotel and Executive Online*, the *New York Times*, the *Wall Street Journal*, and *USA Today*.

**Proposed Initiatives to Address Goal 2**

**Research**

1. Conduct further research on consumer interests and significant target groups among the traveling public to answer key questions such as: What are the demographics and size of key market segments and what are their motivations for giving?



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2. Begin to capture data on actual donor “on the road” giving patterns

**Communication/Education**

1. Build a more comprehensive media strategy for reaching travelers with key messages
2. Spearhead the development of donor education initiatives
3. Help practitioners develop materials communicating civic opportunities for their guests
4. Develop a book that popularizes Travelers’ Philanthropy
5. Develop a “Travelers’ Action Campaign” that provides ongoing, up-to-date information to travelers on relevant programs and giving opportunities
6. Develop new media programs covering Travelers’ Philanthropy initiatives, and create new material for existing programs (like the *Today Show*). Conduct systematic press education and briefing programs
7. Provide a website a central resource for the traveling public, with information about how to get involved in Travelers’ Philanthropy and who to contact
8. Develop a new language and a new set of expectations that describe the “civic traveler” (as one of a self-identified group of other such travelers) with enhanced sensitivities to economic, racial, and geographic disparities between northern and southern countries. Flesh out the “ethos of reciprocity” and the “civic traveler” profile of characteristics in message lines that can be infused in media coverage and in other communication tools

**Program Development** Create a “World’s Most Threatened Destinations Fund” to channel gifts of cash and volunteer activism year round.

*Goal 3: To create a positive policy climate for Travelers’ Philanthropy initiatives*

**Desired Outcomes:**

**Research** Significant changes in policy and regulatory frameworks at every level, from international trade agreements to local development policy, would be put in place to encourage international giving. Thus an assessment of state, federal, and international policy boosters and barriers for Travel Philanthropy would be completed as a relatively early foundation for the movement’s growth.

**Program Development** Major actors (as well as potential supporters and adversaries) in a continuing policy advocacy campaign would also have been identified and briefed. Policy advocacy would be ongoing through supporters of local programs worldwide.

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## Major Past and Current Initiatives Addressing Goal 3

**Research and Program Development** Recognize the importance of a positive policy and regulatory climate for the growth of Travelers' Philanthropy as a field and notes that this is completely uncharted territory at the present time.

### ***Proposed Initiatives to Address Goal 3***

**Research** Identify field barriers and opportunities in the current policy and regulatory framework.

**Program Development** Develop a policy/regulatory reform agenda and a policy reform advocacy capacity.

*Goal 4: To enhance the capacity of community-based philanthropic institutions worldwide*

### **Desired Outcomes:**

**Growth** In ten years, more community philanthropic institutions would exist or be expanded as a result of contributions from travelers. Donor-advised funds earmarked for destination communities would increase substantially within community foundations in travelers' home cities.

**Communication/Education** Peer engagement trips would be commonplace.

## Major Past and Current Initiatives Addressing Goal 4

**Communication/Education** In 2001 and 2002, BEST took a leadership role in bringing experts from organized philanthropy together with pioneer practitioners of Travelers' Philanthropy, through summits mentioned above and through other convenings. CESD is continuing the work started by BEST.

### ***Proposed Initiatives to Address Goal 4***

#### **Communication/Education**

1. Develop educational curriculum focusing on exemplary case studies for use at gatherings sponsored by the Council on Foundations and similar venues
2. Develop peer educational materials and a technical assistance clearinghouse for use by existing and potential leaders of destination and "home city" philanthropic entities

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3. Develop template donor education materials to increase the pool of “on the road” philanthropists and to encourage first-time donors to develop ongoing relationships with destination programs and communities

4. Conduct educational sessions about how to design Travelers’ Philanthropy initiatives at meetings that attract community foundation leaders and donors

### **Program Development**

1. Create a program that fosters the development of “sister foundations” that would link destination and hometown community foundations and donor-advised funds

2. Facilitate the development of a network of philanthropic organizations involved in Travelers’ Philanthropy programs and establish a common meeting ground and an effective technical assistance and training capacity

## *Globalization and Travelers’ Philanthropy*

Globalization has the power to bring greater social justice, economic development, and environmental preservation to the world. It can also further marginalize fragile communities and cultures, as well as accelerate the immense damage being done to our planet. As an indispensable and growing element of globalization, travel is one powerful way to harness globalization’s positive potential. Travelers’ Philanthropy programs like Turtle Island, Lindblad Expeditions and the Galapagos Conservation Fund, and Conservation Corp Africa and the Africa Foundation are already demonstrating that enduring partnerships between travelers, local leaders, and travel-related businesses can strengthen under-resourced communities and help position them to get a fairer share of globalization’s fruits. With adequate support, the Travelers’ Philanthropy movement could increase these benefits dramatically in many parts of the world where the need is greatest.

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- <sup>1</sup> Rosa Songel, "Statistics and Economic Measurement," World Tourism Organization (WTO), as reported to Lisa Mastny, World Watch Institute via e-mail, April 17, 2001.
- <sup>2</sup> Estimates for 2000 taken from the World Travel and Tourism Council (WTTC), "Tourism Satellite Accounting Confirms Travel and Tourism as World's Foremost Economic Activity."
- <sup>3</sup> Ibid.
- <sup>4</sup> WTO press releases: London, May 11, 2000 (on effects of terror), and Madrid, September 17, 2001 ("Tourism Knocked Down But Not Out").
- <sup>5</sup> Martha Honey, *Ecotourism and Sustainable Development: Who Owns Paradise?* (Washington, D.C.: Island Press, 1999), p. 8.
- <sup>6</sup> World Trade Organization, Council for Trade Services, "Tourism Services" background note (Geneva, September 23, 1998), p. 3; WTTC, "Tourism Satellite Accounting"; and WTTC, "Travel and Tourism's Economic Impact" (London, March 1999).
- <sup>7</sup> Overseas Development Institute, "Pro-Poor Tourism Briefing," no. 2 (London, March 2002), p. 2.
- <sup>8</sup> Lisa Mastny, *Traveling Light: New Paths for International Tourism*, WorldWatch Paper 159, ed. Jane A. Peterson (December 2001), p. 19.
- <sup>9</sup> Amartya Sen, "How to Judge Globalism," in *The American Prospect*, TAP, vol. 13, issue 1; available at <http://www.prospect.org/print/V13/1/sen-a.html>, p. 5.
- <sup>10</sup> World Bank, *World Development Report 2000/2001* (Washington, D.C.: Oxford University Press, 2001), p. 3.
- <sup>11</sup> Steven Sanderson, "The Future of Conservation," *Foreign Affairs*, vol. 81, no. 5 (September/October 2002), p. 162.
- <sup>12</sup> The Heinz Center, *The State of the Nation's Ecosystems: Philosophy, Framework, and Findings*, 1st ed., available at <http://www.heinzcenter.org>, pp. 19-23.
- <sup>13</sup> Sen, "How to Judge Globalism," p. 4.
- <sup>14</sup> Sanderson, "The Future of Conservation," pp. 166, 169.