Consumer Demand and Operator Support for Socially and Environmentally Responsible Tourism

Ranweli Holiday Village, Sri Lanka

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CESD/TIES Working Paper No. 104
Revised April 2005

Key Findings

Since 2000, the tourism industry has faced multiple international crises: economic recession, the SARS outbreak, terrorist attacks, and the expanding war on terrorism. Despite these setbacks to the industry, both consumers and travel companies show strong support for responsible tourism, including stating a willingness to pay more for ethical practices, to contribute to community projects, and to support certification.

Consumers continue to view safety, cost, weather, accessibility, and quality of facilities as paramount when planning vacations. However, their demand for ethical products, social investment, and eco-labels is growing., although most consumers do not actively inquire about business practices. Tour operators are increasingly aware of the demand for socially and environmentally responsible tourism, and are exploring certification programs as a way to market their ecotourism products.

To create a current snapshot of the trends that are shaping the tourism industry and informing debates about certification, we analyzed a range of recent studies from the U.S., Europe, Costa Rica, and Australia. The following introduction summarizes our findings on four central topics:

Consumer Demand for Responsible Tourism: *Strong and growing, but largely passive*

- A majority of tourists are interested in the social, cultural and environmental issues relevant to the destinations they visit. They want to learn about the issues both before they travel, and while they are at their destination.

- Many travelers seek out pristine environments to visit, and it is important to the vast majority of them that their trip not damage local ecosystems. They are interested in patronizing hotels that are committed to protecting the local environment, and increasingly view local environmental and social stewardship as a responsibility of the businesses they support.

- However, only a small percentage of tourists describe themselves as "ethical" or actually *ask* about hotel policies; even fewer report changing their plans due to responsible tourism issues.

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. These policies are designed to educate tourists and/or set operating principles.

- Specialist tour operators targeting "green" consumers are more likely to set and publicize responsible practices, because superior environmental performance may bring them branding and price advantages.

- However, few companies feel external pressure to create responsible tourism policies. It is still fairly rare that their customers proactively ask about social, environmental, and economic issues.

Consumer Willingness to Pay for Responsible Travel: *While surveys of intention show strong willingness, few have measured actual consumer practices.*

- At least a third of tourists surveyed say they are willing to pay more to companies that benefit local communities and conservation. Some tourists say they would also be willing to pay more for access to information about the environmental and social aspects of the destinations they visit.

- Tourists from a variety of countries advocate the hiring of local employees, and are willing to pay more for their vacation, if they can be assured that the employees are paid a fair wage.

Travelers' Philanthropy: *Rapidly growing corporate & consumer commitment to assisting local communities*

- The majority of tour operators surveyed say they are supporting local charities and projects, through donation collections both at the destination and as a post–departure follow–up.

- While still only a small share of the overall market, both ethical consumption and socially responsible investment schemes are growing rapidly. Fair Trade products, for example, have enjoyed steep increases in popularity. There is great potential for ecotourism to appeal to a similar consumer demographic.

Support for Certification: *Consumer demand, industry improvements, and corporate benefits constrained by inadequate marketing & label confusion*

- Once educated about ecotourism certification and ecolabels, a majority of tourists support the concept and say that they will use the labels to choose future tour operators.

- However, there are several challenges to certification and labeling, most of which center around a lack of funding and strong marketing for the certification programs. Without adequate marketing and education, consumers are unclear about certification and labeling. The abundance of labels has dimmed tourists' specific recognition of legitimate programs.

- Though most certified businesses cite improvements in performance, employee morale, and internal policies as early successes from certification programs, many have not yet seen the market differential that they had anticipated.

- Nevertheless, most certified operators surveyed in Australia say certification meets their initial expectation and they believe it will provide future.

I. Consumer Demand for Responsible Tourism

Contrary to some beliefs, most tourists do not simply want to live in a 'sanitized bubble' while on holiday…

Tearfund (2000)[1]

➢ **Education and Information**

- More than half (53%) of U.S. 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]

- Nearly two in three British tourists (63%) want some information on the ethical issues associated with their vacation,[3] and 37% said they try to learn about local culture before they travel.[4]

- More than three in four (78%) British package vacation travelers reported that the inclusion of social and environmental information in tour operators' brochures is important to them. Over half (52%) of British respondents indicated that they are interested in finding out more about local social and environmental issues *before* booking a trip.[5]

- In Australia, the opportunity to "learn about the environment" was the motivation most frequently cited by those choosing to patronize ecotourism operations.[6]

- An overwhelming majority (82%) of Dutch tourists believe that integrating environmental information into all travel brochures is a good idea.[7]

- A survey of executives from the U.S.' 2,000 largest foundations found that 80% were interested in hotels' social and environmental practices, and 73% wanted to know similar information about airlines.[8]

➢ **Social and Cultural Aspects**

- Over half (62%) of U.S. travelers surveyed in 2003 say that it is important that they learn about other cultures when they travel,[9] and 52% seek destinations with a wide variety of cultural and arts events/attractions.[10] Nearly half (49%) prefer trips with small-scale accommodations, which are run by local people.[11]

- While cost, weather and quality of facilities are paramount in choosing a holiday, 42% of British tourists look for the quality of local social, economic and political information available; and 37% identified opportunities to interact with local people as an important factor.[12] A separate study found that 75% of British and Australian travelers, and 33% of U.S. tourists, favor seeing local people on their hotel beach.[13]

- Three in four British tourists agree that their trip should include visits to experience local culture and foods. This number increased by 4% between 2000 to 2002, from 77% to 81%.[14]

➢ **Environmental Impact**

- More than two-thirds of U.S. and Australian travelers, and 90% of British tourists, consider active protection of the environment, including support of local communities, to be part of a hotel's responsibility. According to a 2002 survey, these travelers are more likely to patronize hotels with a "responsible environmental attitude." However, only 14% of U.S. travelers, and 26% of Australians, actually ask hotels if they have an environmental policy. Not a single British traveler surveyed spoke to the hotel about their policies.[15]

- In the U.S., 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 U.S. travelers consider environmental factors when deciding which travel companies to patronize.[16]

- In Britain, 87% of tourists interviewed in 2002 stated that it was either "very" or "fairly important" that their vacation not damage the environment; this was up from 85% in 2000.[17] Additionally, 66% of British travelers said that they had placed importance on the fact that their last trip "had been specifically designed to cause as little damage as possible to the environment."[18] In a 1997 survey, 18% of British tourists said that a hotel's lack of concern for the environment would prevent them from returning to the same place again.[19]

- A 2002 survey found German tourists expect environmental quality: 65% (39 million) want clean beaches and water, and 42% (25 million) "think that it is particularly important to find environmentally-friendly accommodation."[20]

➢ Authenticity and Pristine-ness

- Travel experiences are better when the destination is a well-preserved natural, historical, or cultural site, according to 61% of U.S. tourists surveyed.[21] One in three U.S. travelers is influenced by a travel company's efforts to preserve the environment, history, or culture of the destinations it visits.[22]

- Nearly 91 million U.S. 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.[23] More than half of U.S. tourists (54%) notice that there are fewer unspoiled destinations than there used to be.[24]

- In Britain, the figure is even higher: nearly all (83%) British tourists indicated that dirty beaches and a polluted sea "mattered a great deal" in choosing or recommending travel destinations.[25] As many as 42% of European travelers surveyed agreed that they want to visit a "place with clean air [and] water."

- At least 85% of the tourists that visit Costa Rica consider national parks and rainforests the most important places to visit in the country.[26]

➢ Ethics and Reputation

- In choosing a holiday, "the three main criteria are weather, cost and good facilities. But [UK] tourists do show concern about ethical policies and environmental considerations."[27]

- In Britain, 27% of tourists surveyed placed "high" importance and another 34% placed "middle" importance on a tourism company's ethical standing

when choosing a vacation.[28] Another British study found that the "ethically aware" constituted only 11% of the study population, and that this section of the population tended to be younger, more affluent and educated; 48% described themselves as "apathetic" and another 22% as "unconcerned."[29]

- In 2000, 70% of British tourists surveyed felt that the "reputation of the holiday company on environmental issues" is "very important" or "fairly important." This figure dropped to 65% in 2002.[30]

II. Operator Support for Responsible Tourism

With increasing competition in the industry, the companies that dare to become more ethical and respond to this unmet consumer demand will be able to gain a competitive edge.

Tearfund (2000)

➢ **Responsible Tourism Policies**

- In a 2001 study of British tour operators, 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 their activities. Another popular policy consisted of suggestions for how tourists should behave.[31]

- In a 2004 survey by Green Globe 21, 89% of Australian and international organizations that supply the tourism industry stated that "issues of sustainability and corporate social responsibility" are "extremely important" to them and 84% stated that "minimizing their…impacts on the environment and assisting their clients to do the same" are "extremely important."[32]

➢ **Motivations**

- More than 20 of the 65 British companies surveyed said that their responsible tourism policy is designed to educate tourists. Even more said that it is integral to the underlying principles upon which their company operated. Only 3 companies (5%) mentioned external pressure, from NGOs or tourists, as a motivation. Of the companies that had not yet designed a responsible tourism policy, 21% stated that their clients were not interested in such a policy.[33]

- Only 30% of the British companies surveyed said that their customers were asking more about the social, environmental, and economic issues associated with tourism. But a "significant" number of specialist tour operators stated that clients were more interested in these issues after they returned from a trip, having personally experienced the situations and seen the potentially negative effects of tourism.[34]

- 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.[35]

- 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.[36]

- Larger companies, and those with higher visibility (such as multinational businesses), are also more likely to participate in voluntary initiatives because they will benefit from economies of scale. They may also be held to higher standards by consumers, and will be expected to play a leadership role in efforts to protect the environment.[37]
- When large, medium, and small-sized British tour operators were surveyed, most operators agreed that tourists use responsible tourism practices "nearly every time" to choose which tour operator to support.[38]

➤ **Money Left at Destination**
- Small-sized British tour companies, surveyed in 2000, estimated that approximately 70% of their trips' costs remained in the local economies of their destinations. Medium-sized companies put the figure at 35%, while larger tour companies were unable to create an estimate.[39]

III.   *Consumers' Willingness to Pay for Responsible Travel*

"We found that millions of travelers, or geotourists, are aware of travel companies that practice sustainable tourism and they're poised to support the travel industry's geotourism efforts with their travel dollars."

Dr. Susan Cook, Travel Industry of America (2003)[40]

➤ **Environmental Performance**
- Some 58.5 million U.S. 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.[41] A survey of U.S., British, and Australian travelers revealed that 70% would pay up to $150 more for a two-week stay in a hotel with a "responsible environmental attitude."[42]
- One in three British travelers surveyed (35%) said they would pay more for an international trip if their money went to preserving the local environment. And nearly half (45%) of the British tourists queried in a separate study showed willingness to pay more for their trip, provided the money was earmarked for "the preservation of the local environment and reversing some negative environmental effects of tourism."[43]
- British tourists surveyed in 1995 showed that they would pay £6.10-7.50 more to ensure that companies providing accommodations, overseeing tourist attraction, and coordinating their holidays were committed to protecting the environment.[44]
- Two Dutch tourist surveys conducted in 1996 and again in 1999 showed that 23% of respondents might be willing to pay for environmental information, while 5-10% would definitely pay for such information.[45]
- Surveys show that business travelers to Costa Rica "are not as willing to pay higher prices for environmental quality as tourists visiting national parks" in that country. [46]

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- There is little data, however, measuring actual purchases. As one study states, "[M]any surveys…looked at consumers' intentions, but very few …tested consumers' purchasing habits," concluding that "consumers have demonstrated that they certainly care about the environment and donate to NGOs, but they will not alter their lifestyle choices significantly to accommodate this concern…While they state a high concern for eco-social components of a vacation, they do not convert this concern to action when they purchase."[47]

➢ **Social and Cultural Performance**

- More than a third of U.S. travelers (39%) would choose a travel company that protects the historical and cultural aspects of a destination, even if the cost were higher. More than half (67%) of this group would pay at least 5% more to use a responsible travel company.[48]

- In Vietnam, a survey of international and Vietnamese tourists showed that they would pay four to six times the access fee for a specific area, provided that they agreed with the ways in which the money would be used to benefit the community, protect the environment, and increase tourism information.[49]

- Nearly one in three (29%) of British tourists surveyed stated that, if their money guaranteed good wages and working conditions for the local communities, they would be willing to pay more for an overseas trip.[50]

- In another survey, more than half (53%) of British tourists revealed that they would pay more for an excursion, if the workers at the destination were guaranteed good wages and working conditions.[51]

- Support for fair trade products, which continues to grow since the label's initial introduction in 1994, illustrates consumers' willingness to "choose, and pay a premium for, the products of companies that guarantee good working conditions and fair wages to their producers."[52] Fair trade coffee sales, for example, grew by 90% in the U.S. during 2003.[53] Fair trade food sales in the UK more than doubled in the three years before 2003.[54]

➢ **Market for Ethical Products**

- Calculations in the UK show that the "ethical consumption market" increased 15% between 1999 and 2000, and that markets in which there exists an "ethical alternative," ethical consumer purchases increased 18.2% between 1999 and 2000. The sector is growing, though it remains below 2% of the total market share (1.6% in 2000, up from 1.3% in 1999).[55]

- Ethical investment is increasing at a rate of 20% per year, showing a remarkable outlook for the ethical purchasing sector.[56]

- In the U.S., the LOHAS ("Lifestyles of Health and Sustainability") which includes ecotourism was estimated to be $230 billion and includes one-third of U.S. consumers.[57]

IV.   Travelers' Philanthropy

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 financial resources, time, and talent to further the well being of the host communities that they visit.

Center on Ecotourism and Sustainable Development (2004)[58]

❖ Consumer Support & Willingness to Contribute to Host Communities

➢ Concern for Local Residents

- More than two in three (71%) of British and Australian travelers, and over half (53%) of U.S. travelers, endorse the protection of destination communities' well–being and culture.59 Three quarters (76%) of British tourists surveyed in 2002 felt it is important that their trip benefit the people living at their destination, up from 71% in 2000.[60]

- It is very important that hotels support local businesses and invest in local schools and hospitals, according to approximately half of Australian (62%), British (57%), and U.S. (49%) travelers.[61]

- The majority of U.S. (57%), Australian (62%), and British (74%) travelers favor hotels that employ local staff, and even higher proportions from each country expect that their hotels "guarantee good wages and working conditions," state surveys completed in 2002.[62]

- Local food or water shortages that affected people living at their destination "mattered a great deal" to 59% of British tourists responding to a study conducted in 2002, an 8% rise over 2000.[63]

- About 46 million U.S. travelers (30%) "buy from specific companies because they know that these companies donate part of their proceeds to charities," and 23% buy products from local artisans. [64]

- "Nearly half of those questioned said they would be more likely to go with a 'company that had a written code to guarantee good working conditions, protect the environment and support local charities in the tourist destination… [E]thical tourism will rightly be a big issue in the new millennium."[65]

➢ Willingness to Pay

- One in five British tourists (21%) would pay more for an international trip if their money supported a local charity.[66] Half (46%) of the British adults surveyed wanted information on ways that they could support the local economy and local people.[67] Of the British tourists who were willing to pay more for their vacations, the average increase accepted was 5%. "Tourists are not always simply looking for the lowest price: they are willing to pay for principle."[68]

- British tourists spent about £2 billion on trips to developing countries in 1998—an amount roughly equivalent to the British government's annual aid budget.[69]

- "Millions of American travelers will buy from companies and organizations that are culturally and socially oriented. In fact, 46 million travelers buy from specific companies because they know that these businesses donate part of their proceeds to charities."[70]

❖ Operators' Willingness to Contribute to Host Communities

➢ Operator Philanthropy
- Over 70% (46 out of 61) of British companies interviewed stated that they donate money to charity. Of the companies that gave money, the majority (33 of 61) contributed to projects in the destinations they visited, often communities or projects with which they had a long-term relationship.[71]
- In a 2004 Green Globe 21 survey of organizations that supply the tourism industry, 68% responded that they participate in charitable giving to environmentally or socially responsible projects.[72]

➢ Encouraging Traveler Donations
- Two thirds of the companies that donated money offered advice or encouragement to tourists that wished to contribute through individual donations. A number of the smaller operations send out newsletters to clients, once the clients return home, and these often have details about projects the tourists could support.[73]

V.   Support for Certification

❖ Consumer Views of Responsible Tourism Certification

Certification per se *"will rarely become a reason for the purchase of a tourism product or service. However, the ingredients of the programs – assurance that what is promised can be delivered – play an extremely important role in the minds of consumers."*

David Foster, University of Melbourne, 2003[74]

➢ Attitudes towards Eco-Labels
- An overwhelming majority of German domestic tourists, (71.1%) and more than half of the German tourists traveling outside of Germany (59.5%) agree 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) would use an eco-label, if available, in the choice of a vacation.[75]
- In a 2002 travel survey of nearly 8000 Germans, 14.2% (8.5 million) said that "easy access to information on all tourism products in Europe with certified environmental quality (Ecolabels)" was "of peculiar importance" to them.[76]

- In Australia, a 2000 survey by Tourism Queensland found that, after receiving a brief description of the NEAP eco-label and its purpose, the majority of those surveyed said that they would be either "'a lot more likely' or 'a little more likely'" to select certified businesses and products. Most of the travelers reported they would pay at least 5% more to use certified businesses.[77]

- A survey of nearly 500 Danish tourists staying at least one night in Green Key-certified hotels found that 69% were willing to pay extra for hotels with eco-labeling. More than one-third (34%) of the tourists expressed willingness to pay $0.25-$5.00 more to stay in a certified hotel. And 2% were willing to pay $25 more to stay in a certified hotel.[78]

- In a survey in 2000, 90% of Italians said they favor a single eco-label.[79]

➢ Environmental Performance

- Nearly all Italian tourists surveyed (93.7%) said that it was important for accommodations to adopt environmental protection measures. Approximately the same number (89.7%) rated the opportunities for a European eco-label focusing on environmental quality of accommodations as "quite important," or "very important."[80]

- A 1996 study of Dutch tourists found that 86% thought it would be a good idea to provide information on the environmental performance of accommodations. An overwhelming majority (73%) stated that they would use this information when selecting an accommodation. Nearly all (86%) respondents stated that a "star system" rating environmental performance would be a good option.[81]

- About 12 million German tourists (19%) would welcome clear indications of environmentally-friendly hotels, tour operators, and destinations in catalogues and guidebooks.[82]

➢ Awareness and Marketing

- Though a majority of German tourists are familiar with product labels, far fewer currently recognize German tourism eco-labels (only 3% – 19%).[83]

- In Australia, a 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 NEAP. Almost half of this number said they learned about the eco-label from the product's brochure and nearly one third recalled being informed of certification by the operation's tour guides or staff.[84]

- Another study, from Victoria, Australia, showed that tourists rarely recalled observing logos: responses ranged from 16% in accommodations to only 3.2% on tours and cruises. However, when shown a logo, 20% recalled having seen it before. Approximately two thirds (61.3%) of tourists said that "tourism accreditation," or certification, had no meaning for them. After learning about certification, however, 71.4% of the tourists reported that they would choose an accredited tour operator in the future, "if they knew that one existed."[85]

❖ Operator Views of Responsible Tourism Certification

Participation in voluntary environmental programs may allow companies to gain differentiation advantages that yield higher prices or higher sales.

Rivera 2002[86]

➢ Attitudes and Motivations

- Operators in Australia, surveyed in 2000, say they are most often 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."[87]

- In a 2004 Green Globe 21 survey of organizations that supply the tourism industry, 48% said they either already participate in an environmental benchmarking or certification schemes or plan to participate in such a scheme; just under half said previously heard of Green Globe 21.[88]

- In Costa Rica, in-depth interviews with managers of hotel chains in the capital revealed that while they "agreed that the CST [Certification for Sustainable Tourism, Costa Rica's 'green' certification program] could probably help to improve the environmental reputation of their hotels…it was too expensive to adopt CST standards. Most importantly, these managers were not convinced of the appeal of 'green' reputations to business travelers, their main customer base."

- The above study further found that under the CST program, hotels that operate with higher levels of environmental performance (i.e., those awarded a higher number of green leaves) also tend to have higher room prices[89]

- 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."[90]

- A survey within European Union member states found that a majority of respondents favor one uniform 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.[91]

- British tourists have "little loyalty" to tour operators and yet 45% would be more likely to choose a company with a written social and/or environmental responsibility code. "This willingness to go with more ethical companies is both a warning and a positive opportunity to companies who are expecting to lead the way in the UK tourism industry at the start of the new millennium: 'Change in line with the changing public attitudes or be left behind!'"[92]

➢ Impacts of Certification

- Hotels with high environmental performance, under the Costa Rican CST program, tend to have higher room prices, according to preliminary analysis.[93]

- About half (48%) of the Australian operators interviewed said NEAP certification has resulted in "an increased awareness or implementation of environmentally sustainable practices in their business" and just less than one third (30%) reported "an overall increase in the number of customers attracted to their business." More than half say NEAP has provided them with "operational assistance."[94]

- Another Australian study, conducted in Victoria in 2000, concluded that "many operators felt the process of applying for and obtaining accreditation [certification] had had a beneficial impact on their operations." They suggested it particularly benefited "health and safety standards," "staff turnover and morale," and "overall business operations." However, a few operators said they were disappointed that certification had not had the "marketing impact that they had expected."[95]

➢ Satisfaction

- A majority (63%) of NEAP–accredited Australian operators surveyed say NEAP certification has met their initial expectations. Operators reporting dissatisfaction with NEAP's impact on their business (27%), and for whom NEAP did not meet their expectations (27%), are concerned with "the low public awareness of the NEAP, its purpose and ecotourism in general." They attribute the lack of public awareness to the lack of marketing support or opportunities or inefficiency of NEAP's promotional initiatives.[96]

- The overwhelming majority (85%) of NEAP–accredited operators surveyed "believe that NEAP will provide their organization with benefits in the future." The mostly frequently cited benefits include marketing opportunities, increased public awareness of ecotourism, increased business, and quality assurance.[97]

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