



Center for Responsible Travel
Transforming the Way the World Travels

The Case for Responsible Travel: Trends and Statistics

Tourism is one of the world's largest industries.

In 2012, the number of international tourist arrivals surpassed, for the first time, 1 billion,¹ and is forecast to reach 1.8 billion in 2030, according to the World Tourism Organization (UNWTO).² In addition, in 2011, international tourism receipts surpassed \$1 trillion for the first time ever.³ The U.S. leads the world in revenues from international tourism (\$153 billion in 2011), and is second in international visitors (62 million in 2011).⁴ And in four out of five countries (over 150), tourism ranks as one of the top five export earners.⁵

With continuing growth in travel, there is increasing recognition among both travel professionals and consumers of the importance of responsible travel—travel that minimizes negative impacts, brings economic benefits to host communities, and preserves the cultural and natural resources of the destinations. Fortunately for travel businesses and destinations, there is strong evidence that responsible travel is also good for the economic bottom line.

Tourism Terms⁶

Responsible tourism is one of several closely related terms that are ethically based.

While the definitions differ slightly in emphasis, their core message is the same: that tourism, done well, brings positive benefits for conservation and host communities, and is educational as well as enjoyable for the traveler. These terms differ from conventional tourism terms such as nature tourism, adventure tourism, and cultural tourism which describe market segments and not the positive impacts of particular types of tourism.

Category	Definition
Ecotourism	Responsible travel to natural areas that conserves the environment and improves the welfare of local people. (The International Ecotourism Society, TIES, www.ecotourism.org)
Geotourism	Tourism that sustains or enhances the geographical character of a place – its environment, heritage, aesthetics, and culture and the well-being of its residents. (National Geographic Center for Sustainable Destinations, http://travel.nationalgeographic.com/travel/sustainable/about_geotourism.html)
Pro-Poor Tourism	Tourism that results in increased net benefits for poor people. (Pro-Poor Tourism, http://www.propoortourism.org.uk/what_is_ppt.html)
Responsible Tourism	Tourism that maximizes the benefits to local communities, minimizes negative social or environmental impacts, and helps local people conserve fragile cultures and habitats or species. (Cape Town Declaration on Responsible Tourism, www.capetown.gov.za/.../tourism/)
Sustainable Tourism	Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. (World Tourism Organization, UNWTO, http://www.unep.fr/shared/publications/pdf/DTIx0592xPA-TourismPolicyEN.pdf)

Consumer Demand for Responsible Travel

A variety of market studies over the past five years have documented sustained interest among consumers in tourism products and services that protect the environment and respect local cultures.

Experts say...

- “When you look at people’s concerns in the U.S., as well as globally, yes, their concerns about the economy have gone up. But it hasn’t been at the expense of the awareness and concern about the environment. The recession has almost been a catalyst to being green.”

—Kathy Sheehan, Sr. Vice President, GfK Roper ⁷

- “Green concerns have made their way onto the business traveler’s agenda. Business travelers understand the issues and are trying to do their part in being more environmentally responsible when they are on the road.”

—Adam Weissenberg, Deloitte Tourism, Hospitality & Leisure ⁸

- “Green is no longer just a trend. It’s a way of life.”

—Fran Brasseux, Executive Director, Hotel Sales and Marketing Association International (HSMAI) Foundation ⁹

Surveys and Statistics show...

- 93% of *Conde Nast Traveler* readers surveyed in 2011 said that travel companies should be responsible for protecting the environment, and 58% said their hotel choice is influenced by the support the hotel gives to the local community.¹⁰
- According to a 2012 survey, the ‘green’ travel trend is gaining momentum among TripAdvisor members, as 71% said they plan to make more eco-friendly choices in the next 12 months compared to 65% that did so in the past 12 months.¹¹
- More than 90% of U.S. travelers surveyed by the online travel publisher TravelZoo in 2010 said that they would choose a ‘green,’ environmentally conscious hotel if the price and amenities were comparable to those at a non-sustainable, non-green hotel.¹²
- The “TUI Travel Sustainability Survey 2010” of almost 4000 holidaymakers in 7 European countries and the U.S. found that “the most interesting sustainability issues” are: pollution (71%), biodiversity and animal protection (64%), climate change and carbon emissions (63%), fair trade and labor standards (62%), and social and community issues (61%).¹³
- A 2008 survey of business travelers by Deloitte Consulting found that 95% think that lodging companies should be undertaking ‘green’ initiatives and 90% say they look “to green while away.”¹⁴

- “A significant number of international travelers [to the U.S.] seek out nature– and culture-based experiences, such as visiting historic sites (40 percent of overseas travelers), cultural sites (23 percent) and national parks (20 percent). One tenth of all visitors surveyed at national parks since 2002 were of international origin,” according to the U.S. government’s 2012 *National Travel & Tourism Strategy*.¹⁵
- The 2012 *National Travel & Tourism Strategy* found similar trends among Americans traveling abroad: “Nature-based, culture-based, heritage and outdoor adventure travel represent a significant segment of the outbound tourism market as well. In 2010, more than 21 million U.S. travelers visited other countries... Of these, more than one half engaged in nature, culture or heritage tourism experiences, including visits to historic places and cultural and ethnic heritage sites, visits to national parks, camping, hiking, and visits to environmental or ecological sites.”¹⁶
- Two thirds (66%) of consumers around the world say they prefer to buy products and services from companies that have implemented programs to give back to society. 46% are willing to pay extra for products and services from socially responsible companies, and a majority (51%) of those under 40 are willing to do so, according to a 2012 Nielsen Wire survey.¹⁷
- The *CMIGreen Traveler Study Report 2010* asked responsible travelers how the global economic crisis had affected their travel plans: 54% reported taking a “greener” vacation within the last 12 months, “43% of survey respondents say they would be willing to pay up to 5% more to decrease their ‘ecological footprint’ on their next trip; almost as many say they would pay more than that.”¹⁸
- “Eco-conscious” consumers travel more frequently than the average consumer. During 2009, 75.6% took at least two vacations away from home and 22% took five to eight vacations during that time. “That’s far more than the national average,” says *The CMIGreen Traveler Study Report 2010*.¹⁹
- Surveys and studies “consistently find that between 10% and 15% of discretionary travelers want the unusual,” states a 2011 study by the World Tourism Organization (UNWTO). These are the “alternative” or “new tourists” and “growth from these groups is out-speeding that of mainstream segments.” These tourists are “typically highly educated, mature, affluent, well traveled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destinations they visit.”²⁰
- One sector that is growing particularly rapidly is volunteer or service vacations, dubbed “voluntourism.” According to a 2009 *Conde Nast Traveler* “Readers’ Poll,” 47% of those who responded said they are interested in volunteer vacations and 98% of those who had volunteered said they were satisfied with their experience.²¹

● A 2012 Four Seasons survey of luxury travel trends observed:

■ **“Conscientious spending replaces conspicuous consumption.** The affluent put much more thought into their purchasing decisions to determine whether a product or service will intrinsically improve their lives.”

■ **“Money can buy time and experiences.** The strongest contributor to happiness for the time-strapped wealthy is moments spent with loved ones.”²²

● U.S. consumers who are focused on health and fitness, the environment, personal development, sustainable living and social justice (known as conscientious consumers) number 41 million people, or 19% of U.S. adults, according to a 2012 study by the non-profit organization LOHAS (Lifestyles Of Health And Sustainability). Conscientious travelers are part of this “LOHAS pool.”²³

● The growth of conscientious travelers is being driven by a confluence of lifestyle trends that suggest that the demand for responsible tourism is likely to remain strong into the future.²⁴ These trends include:

■ **Emergence of experiential tourism.** In 2001, the UNWTO identified “experiential” tourism (which encompasses ecotourism, nature, heritage, cultural, soft adventure tourism, rural and community tourism) as among the sectors expected to grow most quickly during the coming two decades.²⁵ Experiential tourism involves active participation by travelers in the experience and promotes activities that draw people outdoors, and into cultures and communities. In this sense it is very personal and individual. Essentially, experiential tourists seek memorable experiences.²⁶

■ **Generational shifts.** Members of the “**Baby Boom**” generation (those born between 1946 – 1964) are entering retirement and are finding themselves with more leisure time. Numbering almost 80 million, Baby Boomers control 70% to 80% of the wealth, live longer, value more active lifestyles including long-haul travel, and are increasingly aware of environmental issues. In addition, the “**Gen-Xers**” (the generation born between 1961–1981) are environmentally conscious and have embraced conscientious consumerism or “spending your way to a greener planet.” The “**Gen-Yers**” or “**Millennials**” (children of Baby Boomers born from the early 1980s to 2001) are generally well-informed, electronically savvy, like personal attention, and are passionate about environmental and social justice issues. Each generation influences the others and together they are driving demand for responsible tourism.

■ **Need to connect with nature.** By 2010, half of the world population was living in cities, for the first time in human history. In response, urban workers are seeking to spend their leisure time in areas where they can “reconnect with nature.” Hiking, camping, wildlife viewing, snorkeling and SCUBA holidays (all trending upward) offer a chance to escape from urban environments and busy work lives. Some urbanites, particularly younger ones, turn to active outdoor adventure travel to meet the need to reconnect with nature while maintaining their fast-paced lifestyle.

■ **Demand for authenticity.** Modern consumers want authentic experiences. According to the UNWTO, “The postmodern consumer’s search for experiences that are engaging, personable, memorable – and above all authentic is especially strong in respect of tourism.”²⁷

■ **Togetherness.** Families are taking three-generation journeys, with grandparents, parents, and children going on holidays together. They want to enjoy and spend time with one another, but also to have the opportunity to each do different things. They seek holidays offering a range of activities.

■ **Search for fulfillment.** As Baby Boomers, Gen-Xers, and Millennials or Gen-Yers seek authentic, ‘green’ experiences as an escape from the stress of urban life, they are also increasingly searching for deeper meaning in their vacation experiences. This has led to a tremendous growth in both volunteer tourism (“voluntourism”)²⁸ and travelers’ philanthropy²⁹ programs, where travelers donate time, money, or goods to support worthy projects in the host destination. Opportunities for personal growth and fulfillment are a value-added component of leisure holidays, and responsible tourism is growing as providers recognize this growing demand.



Tour Boats in the Galapagos Islands

The Business Case for Responsible Tourism

Within the last few years, sustainability has become much more mainstream within the tourism industry, with increasing numbers of businesses creating environmental departments, adopting environmental and social good practices, seeking certification, and looking at ways to 'green' their supply chain.

Experts say...

- "One thing is for sure — travel companies and services are all beefing up their eco credentials in order to attract the rising number of customers seeking a 'green' experience."

—Jason Halal, Manager of Sierra Club Outings³⁰

- "Sustainability is at the forefront of our business model because of customer demand."

—Bruce Poon Tip, Founder and CEO, G Adventures³¹

- "Sabre is keenly focused on the economic, social and environmental sustainability of the travel industry and we are committed to providing our customers with products and services that help them promote these same long-term values throughout their businesses."

—Greg Webb, President, Sabre Travel Network³²

- "When it comes right down to it, sustainability pays. And it pays in three ways: guests are increasingly interested, so it's good for business; there are real opportunities to reduce costs and do things that are 'green' at the same time; and something not everybody realizes, there is so much passion and energy within the organization to do this that the ability to get people excited about the company they're a part of through the kinds of green practices we've been implementing is another source of success and payoff."

—Frits van Paasschen, CEO, Starwood³³

Surveys and Statistics show...

- A 2012 report by The Travel Foundation and Forum for the Future states, "Today's consumers expect travel companies to build sustainability into their product offer. A majority (70%) believe companies should be committed to preserving the natural environment and 55% want fair working conditions, while three quarters want a more responsible holiday and 66% would like to be able to easily identify a greener holiday." In addition, "84% of those working in marketing & PR management see green credentials becoming increasingly important as environmental issues move to the forefront of customers' minds." This report identifies 6 key benefits travel businesses will gain by adopting responsible practices:

- (a) Reduce costs and improve efficiencies.
- (b) Manage risks and meet emerging legal and regulatory requirements.

- (c) Engage staff in CSR, which has proven to be a key driver of employee satisfaction.
- (d) Gain competitive advantage by offering differentiating experiences to customers.
- (e) Meet emerging consumer trends.
- (f) Protect your business, by protecting the environment on which it depends.³⁴

- In 2008, the World Travel Market's *Global Trends Report* urged businesses to pay attention to "consumer trends that resonate across all regions—the desire for social and environmental responsibility, social interaction, authentic travel experiences and fair trade practices. During the downturn, travel and tourism companies that adapt and integrate such business practices into their product and service offer will be best placed for survival. They will gain a valuable point of differentiation in the face of declining consumer purchasing power. Consumers are willing to trade up for sustainability, thus operators should let 'conscientious consumption' now drive the travel and tourism industry through these uncertain times."³⁵

- A groundbreaking 2011 study by the Harvard Business School showed that companies that adopted environmental, social, and governance policies in the 1990s outperformed those that did not. The evidence from a detailed comparison of 90 "high sustainability" companies and 90 "low sustainability" or traditional companies "suggests that sustainable firms are not adopting environmental and social policies purely for public relations reasons. Adoption of these policies is not just cheap talk; rather these policies reflect substantive changes in business processes."³⁶

- More than 51% of meeting planners will hold meetings only in sustainable venues, according to a 2010 survey.³⁷ And, according to an executive at the JW Marriott Denver, "75% of meeting planners ask about green initiatives when deciding where they want to have a gathering."³⁸

- 65% of corporate travel executives responsible for more than \$10 million in annual travel budgets are in various stages of implementing 'green' business-travel guidelines, according to a 2011 survey of Association of Corporate Travel Planners members.³⁹

- The hospitality industry spends over \$7.5 billion on energy each year. Reducing energy use by 10% would result in approximately \$750 million in annual savings.⁴⁰

- Examples of businesses demonstrating the economic and strategic benefits of sustainability include:

- (a) Many leading hoteliers have created senior management positions in sustainability, recognizing its importance to their business. These include: Marriott, Hilton, IHG,

Fairmont, Wyndham, Accor and Kimpton, among hoteliers, as well as Royal Caribbean Cruise Lines, TUI Travel, and Vail Resorts.

- (b) Marriott International has developed a 'green' hotel prototype pre-certified by the U.S. Green Building Council as part of its LEED Volume Program. This prototype saves Marriott's hotel owners an average of \$100,000 in development costs, six months in design time, and up to 25% in terms of energy and water consumption.⁴¹
- (c) TUI Travel saved about GBP £21 million and reduced its carbon emissions by more than 200,000 tons between 2008 and 2011.⁴²
- (d) The Loews Philadelphia Hotel increased its Energy Star score by 16 points and reduced energy use by over 13% in 3 years by implementing improvements to its HVAC, lightening, and water systems.⁴³
- (e) From 2005 to 2008, HEI Hotels & Resorts undertook a number of energy efficiency projects at its properties, including (i) retrofitting light fixtures with energy efficient bulbs, (ii) installing HVAC management systems, and (iii) upgrading water heating controls and plumbing fixtures. These programs produced, on average, a return on their investment after 2.79 years.⁴⁴
- (f) The Willard Intercontinental Hotel in Washington, DC has documented over \$1 million in new business a year as a direct result of its sustainability initiatives. The additional business comes from guests, meeting planners, and wedding parties who say they chose the hotel because of its 'green' initiatives.⁴⁵



The Historic Willard InterContinental Hotel, Washington, DC

The Destination Case for Responsible Tourism

In recent years, increasing attention has been focused on protecting and enhancing environmental and social sustainability within entire tourism destinations, and not simply within individual businesses. Tools for measuring and criteria for certifying 'green' destinations are gradually being developed, including by the Global Sustainable Tourism Council (GSTC), European Union, National Geographic's Geotourism Program, Ethical Traveler, EarthCheck, and Green Globe. At present, none of these have fully operational certification programs for destinations. However, Geotourism⁴⁶, GSTC,⁴⁷ and Ethical Traveler⁴⁸ have all published lists of responsible destinations based on either their own surveys or sets of social, cultural, environmental, and other criteria.

Experts say...

- "Tourism can do a great deal of good in destinations – whether it be by bringing economic benefits to local communities; helping with conservation efforts or in placing a value on aspects of cultural heritage."

—Sir Ranulph Fiennes, *Veteran British Explorer*⁴⁹

- "In the end it's all about protecting our product. If the product—our destinations—aren't protected in environmental and social terms then people won't want to visit them, it is as simple as that."

—John De Vial, *head of Financial Protection, ABTA*⁵⁰

- "It's incredibly encouraging to see the strides [that] ethical destinations are making in the areas of social and ecological wellness."

—Natalie Lefevre, *Ethical Traveler*⁵¹

Surveys and Statistics show...

- About half the U.S. states have voluntary 'green' lodging certification programs, most focused on environmental efficiencies. In several states, including Florida⁵² and California⁵³, state employers are encouraged to use certified hotels when on state business.
- Consumers are increasingly taking into account a destination's reputation for social and environment responsibility when they make their travel choices. "The buildup of consumers' socio-environmental awareness of tourism development," states the UNWTO, "is leading to increased scrutiny on the part of the public in destination decision-making and a growing requirement for new tourism developments to be sustainable.... [T]he rewards of adopting sustainable tourism development strategies are evident in destinations like Switzerland and New Zealand—but these issues remain only partially addressed in many other destinations."⁵⁴

- Nearly a third of travelers (30%) would choose a destination for a trip because it is considered eco-friendly. Costa Rica is the most popular destination in the world for travelers interested in an eco-friendly trip, according to a 2012 TripAdvisor survey.⁵⁵
- In 2011, Barcelona was awarded the first Biosphere World Class Sustainable Destination certification by the Responsible Tourism Institute, granting it the title of the first city in the world to be a certified sustainable urban destination.⁵⁶
- The 2012 TripAdvisor survey found that travelers rank the “top 3 eco-friendly” U.S. cities as Portland, Oregon, San Francisco, and Seattle, Washington.⁵⁷
- In 2011, *Condé Nast Traveler* ranked Charleston, South Carolina as the “Top U.S. City” based on its annual Readers’ Choice survey. In the previous 14 Readers’ Choice surveys (1997-2010), Charleston was ranked among the top five cities. The city’s well-regulated, overnight tourism centered on its historic homes, buildings, and culture attracts four million annual visitors and generates more than \$3 billion in annual revenue.⁵⁸
- A 2012 study by The Travel Foundation and Forum for the Future concludes that to “the overall issue of who is responsible for protecting the destination as a tourism product, a more holistic approach is now emerging—the idea of destination partnerships. Rather than any one party being responsible for protecting a destination, this is a multi-stakeholder approach whereby all parties interested in a destination as a resource look at how they can work together to achieve a common goal of sustainability.”⁵⁹
- Ecotourism can return as much as 95% of revenues to the local economy, compared to only about 20% for “standard all-inclusive package tours,” according to a 2011 UN-supported study by the Collaborative Partnership on Forests. In addition, tourism provides locals with incentives to preserve the destination in order to make it attractive to tourists.⁶⁰
- Between 1986 when ecotourism began to take off in Costa Rica and 2007, tourist arrivals increased 7-fold while tourism revenue increased 14-fold. This demonstrates that as Costa Rica grew to become a leading ecotourism destination, it doubled its earnings/tourist.⁶¹
- In 2010, international tourists to Costa Rica spent on average \$944 per visit, while tourists in France spent \$666 per visit. Costa Rica, a predominantly ecotourism destination, therefore generated 42% more revenue per tourist than did France, a more conventional, mass market tourism destination.⁶²
- The Botswana Tourism Organization has employed a ‘low-volume—high-yield’ destination management strategy in the Okavango Delta region to generate high levels of employment, income, and tax revenue while also protecting wild lands and threatened species. Approximately 34% of the adult population in the region now works in tourism, supporting livelihoods and contributing to the conservation of fragile habitats and threatened species.⁶³
- In 2010, Russian Prime Minister Vladimir Putin pledged to spend at least \$160 million over the next five years to build and improve ecotourism attractions, in order to increase visitation to Russia’s parks. This decision came after Russian experts saw the economic benefits of ecotourism in the United States where tourists pay \$14.5 billion per year to visit the national parks.⁶⁴
- In Namibia, the combination of low impact luxury lodges and big-game safaris have been successful in drawing international visitors. Wildlife has more than doubled because villagers who have become partners in the ecotourism ventures, now value and protect their habitat.⁶⁵
- According to the UNWTO Secretary-General, Taleb Rifai, “Many of the 50 million international tourists visiting Africa each year are driven by the continent’s unparalleled wildlife and natural scenery. These tourists spend in the local economy, sustain jobs and provide an incentive for conservation, making tourism a powerful engine for sustainable development.”⁶⁶

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This document has been prepared in collaboration with and endorsed by the following tourism organizations:



END NOTES

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