



Center for Responsible Travel

Transforming the Way the World Travels

The Case for Responsible Travel: Trends & Statistics 2015

International tourist arrivals (overnight visitors) reached 1.138 billion in 2014 – 4,000% higher than the 25 million annual tourists in the 1950s. Arrivals increased 51 million in 2014, or 4.7%, over 2013. And 2014 marked the fifth consecutive year of above average growth since the 2009 economic crisis. International tourism receipts also hit a new record, reaching US\$ 1,197 billion in 2013 or US\$ 230 billion more than in the pre-crisis year of 2008.¹

The travel industry contributed US\$ 7.6 trillion or 9.8% to world GDP in 2014, growing for the fifth consecutive year. Travel and tourism also employed (direct, indirect, and induced) nearly 277 million people in 2014² which is equivalent to 1 in 11 jobs on the planet. By 2025, the number of employed is projected to rise to 356 million and the contribution to the global economy is forecast to reach US\$ 11 trillion.³

Tourism Terms

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

CATEGORY	DEFINITION
Ecotourism	Responsible travel to natural areas that conserves the environment and improves the welfare of local people.
Ethical Tourism	Tourism in a destination where ethical issues are the key driver, e.g. social injustice, human rights, animal welfare, or the environment.
Geotourism	Tourism that sustains or enhances the geographical character of a place – its environment, heritage, aesthetics, culture and well-being of its residents.
Pro-Poor Tourism	Tourism that results in increased net benefit for the poor people in a destination.
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.
Sustainable Tourism	Tourism that leads to the management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.

The Role of Responsible Travel

The social and environmental imperative for responsible tourism is mounting as inequality between the world's richest and poorest continues to widen and the realities of climate change become ever more apparent. In 2014, an Oxfam report found that the world's 85 richest people control US\$ 1.7 trillion – the same amount as the bottom half, 3.5 billion people – of the global population.⁴ 2014 was also the hottest year on record, followed by 2010 and 2005, according to data from NASA and the National Oceanic and Atmospheric Administration (NOAA).⁵

Tourism, as the largest global service industry and one of the top industries for poor countries, has an important role to play in reversing these catastrophic trends. As UN Secretary General Ban Ki-Moon states, "One of the world's largest economic sectors, tourism is especially well-placed to promote environmental sustainability, "green" growth and our struggle against climate change through its relationship with energy."⁶

Consumer Demand for Responsible Travel

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

Experts say...

"Responsible travel is moving beyond the confines of 'eco travel,' ecolodges and other overtly 'green offerings. Increasingly, it is about the *how* as much as the *what* of travel."

—American Society of Travel Writers (ASTA)⁷



Guests hike with a local guide in Costa Rica.
Photo: Lapa Rios Ecolodge

"Tourist choices are increasingly influenced by sustainability considerations."

—World Tourism Organization's (UNWTO) 2012 *Tourism in the Green Economy Report*⁸

"The encouraging thing is that sustainable tourism is becoming more widely accepted – so much so that UNESCO, the United Nations Educational, Scientific and Cultural Organization, now believes it will go from 'alternative' to 'mainstream' within a decade."

—Alex Blackburne, Editor, *Blue & Green Tomorrow*⁹

"Sustainability is at the forefront of our business model because of customer demand." G Adventures grew its revenue by 42% (around US\$ 150 million) during the economic crisis because it aligned its business model with sustainability.

—Bruce Poon Tip, Founder and CEO, G Adventures

Surveys and Statistics show...

Some 43% of respondents said they would be considering the ethical or environmental footprint of their main holiday in 2014, with nearly 10% more saying they would be doing so partially, according to Blue & Green Tomorrow's *Sustainable Tourism 2014*.¹⁰

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, according to a 2012 Nielsen Wire Survey. Of this, 46% are willing to pay extra for CSRs.¹¹

In April 2014, U.S. travelers stated that they turned off lights (96%) and air conditioning (72%) when not in their hotel room, participated in their hotel's towel/linen reuse program (90%), and used their hotel's recycling facilities (81%) in order to travel "green." That said, only 12.7% were willing to pay US\$ 10 – \$25 extra, while over 30% of global tourists were only willing to pay only US\$ 1 – \$5 extra per night for an environmentally friendly hotel.¹²

The percentage of companies with travel booking policies that either require or recommend that a hotel adopt "sustainability" measures has jumped to 19% in the U.S., up from 11% in 2011, according to a new study by the Global Business Travel Association, the trade group for the world's business travel managers.¹³

One in five consumers (21%) say they are prepared to pay more for a holiday with a company that has a better environmental and social record; this has increased from 14% in 2012 and 17% in 2010. There is also growing support for holidays to have an environmental and social rating, similar to star ratings for hotels, with over one-third (36%) of consumers in favor of this, up from 25% in 2012 and 29% in 2010.¹⁴

96% of respondents stated that they expected that aircraft would need to be more environmentally sustainable in 2050, according to a May 2012 Statista survey. The company's research shows that 86% of global travelers felt that aircraft innovations that enabled less fuel consumption and fewer carbon emissions were most appealing.¹⁵ In 2015, a prototype solar-powered aircraft attempted the first round-the-world flight, heralding the possibility of fossil fuel free, clean technologies in aviation.¹⁶

A 2013 Travel Guard survey of travel agents concluded, "green travel is here to stay." The survey found "24% of those who responded noted that interest in 'green' travel is currently the highest it's ever been in the last 10 years, and 51% reported that interest has remained constant throughout this time period."¹⁷

A 2013 TripAdvisor.com survey of 1,300 U.S. travelers shows that nearly two-thirds "often" or "always" consider the environment when choosing hotels, transportation and meals.¹⁸

"Today's consumers expect travel companies to build sustainability into their product offer. A majority of 70% believe companies should be committed to preserving the natural environment and 55% to fair working conditions, while 75% of consumers want a more responsible holiday and 66% would like to identify a 'greener' holiday easily. To match these expectations, 84% of those working in marketing and public relations management see 'green' credentials becoming increasingly important as environmental issues move to the forefront of customers' minds," states a 2012 report by The Travel Foundation and Forum for the Future.¹⁹

"A significant number of international travelers seek out nature- and culture-based experiences, such as visiting historic sites (40% of overseas travelers), cultural sites (23%) and national parks (20%)," according to the U.S. government's 2012 *National Travel & Tourism Strategy*.²⁰

This 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."²¹



Outdoor adventure travel is increasing in popularity.
Photo: Northwest Florida Outdoor Adventure

In 2014, domestic and international travelers made over 292 million recreation visits to the 370 recreation areas administered by the U.S. National Park Service.²²

47% of business travelers prefer staying in a green-certified hotels, according to Timetric's *Global Business Traveler Survey 2013*.²³

95% of business travelers surveyed believe that the hotel industry should be undertaking "green" initiatives and that sustainability will become a defining issue for the hospitality industry in 2015 and beyond, according to Deloitte's *Hospitality 2015* report.²⁴

In 2012, 35% of adults said they would like to try a holiday involving a voluntourism component and 6% said they had already done so.²⁵

A 2013 Travel Guard survey of travel agents found that 38% reported that the ecotourism activity most popular with their clients is visiting historical sites, followed by animal-related activities such as wildlife safaris and bird watching (22%).²⁶

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."²⁷

The Business Case for Responsible Tourism

Sustainability is becoming 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...

"There are a growing number of consumers, particularly the young, who are prepared to pay a premium for a holiday that is more sustainable.... So, it makes clear economic sense for companies to have a well thought out sustainability plan that sells the positive benefits of sustainability to consumers and taps into this growing market."

—*Nikki White, Head of Destinations & Sustainability, ABTA*²⁸

"Being a Responsible Business is part of IHG's DNA. As one of the world's leading hotel companies, with a broad portfolio of brands, we have an unrivalled opportunity to bring about positive change in the environment and community both at a local and global level."

—*Richard Solomons, Chief Executive Officer, InterContinental Hotel Group*²⁹

“With leadership comes responsibility. 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.”

—Gregg Webb, President, Sabre Travel Network³⁰

“As market leader, it is incumbent on us to pioneer sustainability change in our sector – a challenge we embrace, in the knowledge that success is critical to the future health of our business and of the industry.”

—Peter Long, Chief Executive, TUI Travel³¹

Surveys and Statistics show...

In line with consumer sentiment, the majority of businesses (91%) agree that operating in an eco-friendly manner is important. North American and South American businesses are the most likely to think that it's important to have eco-friendly practices in place (both 93%). Over three-quarters of businesses (77%) currently have practices in place to reduce the impact their business has on the environment, according to a TripAdvisor survey, 2012-2013.³²

In a survey by Statistic, 36.1% of respondents stated that they appreciate green design and construction as an environmentally friendly hotel practice.³³

85% of U.S. hoteliers indicate that they currently have “green” practices in place, according to a 2013 study by TripAdvisor.³⁴

A 2013 Conference Board survey of over 120 multinational corporations in Europe and the U.S. found that 73% identified “integrating sustainability into their corporate strategy” as a top priority for their executive leadership team.³⁵



Elevated bungalows that offer ocean views without damaging the dunes are a great example of “green” design.

Photo: Playa Viva, Guerrero, Mexico

A 2012 report by The Travel Foundation and Forum for the Future identifies six key benefits travel businesses will gain by adopting responsible practices:

- Reduce costs and improve efficiencies.
- Manage risks and meet emerging legal and regulatory requirements.
- Engage staff in CSR, which has proven to be a key driver of employee satisfaction.
- Gain competitive advantage by offering differentiating experiences to customers.
- Meet emerging consumer trends.
- Protect your business by protecting the environment on which it depends.³⁶

72% of meeting planners say they have “green” policies in place for at least some of their meetings, and 19% say they have such policies for all meetings, according to a 2013 survey of *Successful Meetings* readers. In addition, 73% of planners say sustainable policies and procedures have some or a great deal of influence on the hotel they choose.³⁷

Some specific examples of businesses demonstrating the economic and strategic benefits of sustainability include:

- Many leading hoteliers have created senior management positions in sustainability, recognizing its importance to their business. Examples include: Marriott, Hilton, IHG, Fairmont, Wyndham, Accor and Kimpton, among hoteliers, as well as Royal Caribbean Cruise Lines, TUI Travel, and Vail Resorts.
- 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.³⁸
- Beginning in January 2015, InterContinental Hotels Group’s (IHG) Green Engage system, a point-based metric program similar to LEED, is being rolled out across the company’s 4,800-plus hotels. Properties that wish to move beyond internal recognition and earn independent third party certification will now have the option of seamlessly and cost-effectively gaining EarthCheck Certification.³⁹
- Hilton Hotels worldwide reduced energy use by 13.6%, carbon output by 20.2%, waste output by 26.8%, and water use 13.1% between 2009 - 2014.⁴⁰
- In 2013, TUI Travel took 3.8 million customers to hotels with sustainability facilities, featured over 1,200 hotels with sustainability certifications, and reduced average per passenger carbon emissions by 9.3%. In addition, 94% of their aircraft are now fitted with fuel-saving blended winglets, reducing fuel burn by up to 5%.⁴¹

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 UNWTO, European Union, National Geographic’s Geotourism Program, Ethical Traveler, EarthCheck, Green Globe, and Sustainable Travel International. In November 2013, the Global Sustainable Tourism Council (GSTC) released its Criteria for Destinations (GSTC-D), which represents a common understanding of the minimum requirements for a sustainable destination.

Experts say...

“In a growing number of destinations, the business leaders, citizens, and government authorities are realizing that safeguarding their distinctive sense of place – cultural assets, natural habitats, historic feature, scenic appeal – are essential for reaping the benefits of responsible tourism. A trend to encourage.”

—Jonathan Tourtellot, *Geotourism Editor, National Geographic Traveler*⁴²

“Tourism – done right – can be a powerful tool for conserving wilderness and heritage areas. For both traveller and local, it increases appreciation of the spiritual and environmental importance of conserving biodiversity.”

—Kerry Lorimer, *Code Green: Experiences of a Lifetime*⁴³

“Sustaining places sustains us as human beings. Without a healthy planet where industries operate, sustaining ecosystem services, where human rights are respected, where quality of life is improved, we really cannot exist long-term.”

—Dr. Kelly Bricker, *Chair, GSTC*⁴⁴



Tourists are gaining socio-environmental awareness.
Source: *The International Ecotourism Society*

“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*⁴⁵

Surveys and Statistics show...

The UNWTO predicts that ecotourism, nature, heritage, cultural and “soft adventure” tourism will grow rapidly over the next two decades and global spending on ecotourism is expected to increase at a higher rate than the tourism industry as a whole.⁴⁶

“The world’s terrestrial PAs (protected areas) receive about 8 billion visits per year – of which 80% are in Europe and North America...[T]hese visits generate approximately US\$ 600 billion per year in direct in-country expenditure and US\$ 250 billion per year in consumer surplus,” according to a 2015 academic study.⁴⁷

Ecotourism has made its mark worldwide as a popular way to see the sights without leaving a trace. Such tourism could grow to 25% of the global travel market within six years and account for US\$ 470 billion per year in revenues, according to The International Ecotourism Society (TIES).⁴⁸

“Destinations are threatened by climate change impacts, extreme weather, water scarcity, unprecedented rates of biodiversity loss, disease and growing poverty and inequality... Sustainable tourism addresses the challenges head on, by protecting destinations at the same time as enhancing brand value, increasing profits, saving costs, and improving competitive positioning, both for attracting and retaining customers and recruiting the best talent,” according to the 2012 study by The Travel Foundation and Forum for the Future.⁴⁹

This 2012 study states further that regarding “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.”⁵⁰

“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.”⁵¹

“To satisfy the definition of sustainable tourism, destinations must take an interdisciplinary, holistic and integrative approach which includes four main objectives: to (i) demonstrate sustainable destination management; (ii) maximize social and economic benefits for the host community and minimize negative impacts; (iii) maximize benefits to communities, visitors, and cultural heritage and minimize impacts; and (iv) maximize benefits to the environment and minimize negative impacts,” according to the 2013 Global Sustainable Tourism Criteria for Destinations.

The following are examples of destination initiatives to become more sustainable:

- The City of Melbourne, Australia has introduced an innovative environmental program to help city hotels to cut energy, water and waste management costs. This Savings in the City program helps hotels to identify economically viable actions they could take to reduce energy consumption and operating costs. Eleven hotels are among the top 200 water users in Melbourne. And the hospitality sector – accommodation and food providers – generates up to 18% of all waste in the municipality, so there’s plenty of scope to make meaningful savings.⁵²
- In 2013, *Condé Nast Traveler* ranked Switzerland and Okavango Delta in Botswana as the best sustainable destinations among developed and developing countries respectively.⁵³
- According to the April 2013 Travel Guard update, a whopping 49% of travel agents named Costa Rica as the most popular destination among clients, followed by South Africa (12%), the Galapagos Islands (8%), Peru (7%) and Belize (6%).⁵⁴
- A 5-year destination partnership in Cyprus has resulted in mandatory hotel sustainability standards for every hotel in Cyprus – a world first. The minimum standards cover environmental issues and support for communities through local sourcing, promoting local history and culture, and help with community initiatives.⁵⁵
- The 2012 TripAdvisor survey found that travelers rank the “top three eco-friendly” U.S. cities as Portland, Oregon; San Francisco, California; and Seattle, Washington.⁵⁶
- 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 in 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 US\$ 3 billion in annual revenue.⁵⁷
- 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.⁵⁸

- In Namibia, the combination of low impact luxury lodges and big-game safaris have been successful at drawing international visitors. Wildlife has more than doubled because villagers have become partners in the ecotourism venture and now value and protect their habitat.⁵⁹
- Ethical Traveler’s list of *The World’s Ten Best Ethical Destinations – 2015*⁶⁰ includes:
 - ◆ **Lithuania**, which set a goal of 23% use of renewable energy by 2020, and is currently at 22% – far ahead of schedule.
 - ◆ **Palau** is promoting energy efficiency through an innovative financing scheme that provides subsidies for citizens to build new homes with energy-saving features. This is moving the country toward its target of 20% renewable energy and 30% energy efficiency by 2020. Palau is also designated an “Environmental Star” by the Small Island Developing States (SIDS) for its extensive care of marine and terrestrial areas.
 - ◆ **Uruguay** has positioned itself at the forefront of sustainable public transportation in Latin America, with hopes to see electric buses and taxis on its streets by 2015. Another impressive stride in Uruguay is its movement to become carbon neutral. With 80% of its energy now coming from renewable sources, the country is well on its way to meeting its goal of 90% by the end of 2015.
 - ◆ **Mauritius**, which retains a rich, diverse flora of over 670 species of flowering plants (over 300 of which are endemic), embarked on a campaign to plant 200,000 trees by 2014. It has also established fishing reserves and marine parks and has instigated a community-based coral-farming program to combat the loss of reefs.



Coral farming programs combat the loss of coral reefs in Mauritius.
Source: Wikimedia Commons

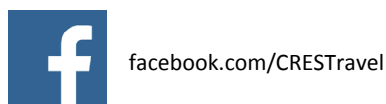
- According to Green Global Travel, 15 countries were chosen in 2015 as responsible, sustainable tourism destinations.⁶¹ Among these top destinations are:
 - **Barbados:** Leading the way in finding sustainable means of building tourism while protecting its coastline, Barbados stands out as a best practice model for the Caribbean. Their UNICEF child mortality rates are very good, which is an indicator of women’s rights and social welfare. They also earned the highest possible scores from *Freedom House* in the categories of Political Rights and Civil Liberties, as well as high Press Freedom ratings.
 - **Northeast Kingdom, Vermont:** The Northeast Kingdom has embraced the concept of “geotourism,” offering a plethora of localized experiences for visitors to enjoy, including hands-on

opportunities at many area farms. Carefully avoiding mass tourism, the Northeast Kingdom has been able to create tourism based on community, small businesses, and stewardship of their abundant natural resources and built heritage.

- **Tortuguero, Costa Rica:** This small village and national park on Costa Rica’s Atlantic coast is an anomaly. It’s roadless and remote, but still one of the country’s most popular ecotourism destinations. The main draw is four species of sea turtles, thousands of which nest and hatch along 20 miles of black sand beach between February and November. Turtle viewing tours – well-organized, small group night walks along the beach – and other ecotourism activities have brought income to locals and helped to slow poaching of turtles and their eggs.

This 3rd edition of *Trends and Statistics* was produced by the Center for Responsible Travel (CREST) in April 2015. It is available for public use free of charge. We ask only that attribution is given to CREST. In order to assist with CREST’s periodic updates, please send any statistics or quotes to staff@responsibletravel.org. CREST thanks Yuebo “Robert” Li and Eunmi “Umi” Kim for research and updates and Allison Christensen for the graphic art and layout.

This report has been prepared in collaboration with the following organizations:



Center for Responsible Travel

ENDNOTES

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