



The Market for Responsible Tourism Products

With a special focus on Latin America and Nepal

SNV

Connecting People's Capacities

Netherlands

Development

Organisation

ISBN 978-90-77821-29-9

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Basic Facts About SNV

Our Mission

SNV is dedicated to a society where all people enjoy the freedom to pursue their own sustainable development. We contribute to this by strengthening the capacity of others.

We help alleviate poverty by focusing on increasing people's income and employment opportunities in specific productive sectors, as well as improving their access to water and sanitation, education and renewable energy.

What do we do?

SNV supports national and local actors within government, civil society and the private sector to find and implement local solutions to social and economic development challenges. We stimulate and set the framework for the poor to strengthen their capacities and escape poverty. We do this by facilitating knowledge development, brokering, networking and advocacy at national and international level. Partnerships with other development agencies and the private sector are key to our approach.

Our advisors work in over 30 countries across five geographical regions-Asia, the Balkans, East and Southern Africa, Latin America and West and Central Africa-by providing advisory services to local organisations in seven sectors:

- Pro-Poor Sustainable Tourism
- Renewable Energy
- Water, Sanitation & Hygiene
- Education
- Health
- Small Holder Cash Crops
- Forest Products

SNV & Pro-Poor Sustainable Tourism

Tourism is one of the world's largest industries. According to the World Tourism Organisation, the tourism industry is estimated to comprise US\$ 5,890 billion, or 9.9% of the total world GDP and employing more than 22 million people in 2008. Tourism is particularly significant for developing economies, which receive an estimated 30% of global tourism expenditure.

In recent years tourism has been increasingly recognised for its potential to contribute to the reduction of poverty. Its geographical expansion and labour intensive nature support a diversification of employment, and can be particularly relevant in remote and rural areas, where 75% of the two billion people in extreme poverty live. Tourism is particularly significant for developing economies, which receive an estimated 30% of global tourism expenditure. Tourism is a major export sector of many developing countries, and is the primary source of foreign exchange earnings in 46 of the 50 Least Developed Countries.

Accordingly, SNV's Pro-Poor Sustainable Tourism (PPST) strategy supports actors from district, national and international levels to effectively harness tourism as a driver for job creation and local economic development to benefit the most disadvantaged communities. SNV focuses on all aspects of sustainability: economic, environmental, cultural, and institutional (good governance). SNV is currently promoting pro-poor sustainable tourism in 23 countries in Asia, the Balkans, East and Southern Africa, West and Central Africa, and Latin America.

Broadly speaking, SNV has designed its programmes across the globe to work on effective **Destination Development** and Management and promote **Responsible Business in Tourism**.

The **Destination Development and Management** approach is a holistic framework for improving the long-term viability or competitiveness of a destination. In order to establish a successful, sustainable, more inclusive destination means, SNV pays close attention to ensuring:

- The volume of tourism is increased (attract more tourists, lengthen duration of their stay, repeat business, increase what they spend locally, reduce seasonality, improve return on investment and yield per visitor)
- Benefits of tourism are spread over more stakeholders, particularly the poor and marginalised, and
- A balance is maintained between economic, socio-cultural and environmental impacts.

Responsible Business in Tourism: An important facet of Destination Development and Management is how the private sector, a crucial stakeholder, engages in the destination and produces positive impacts through its business. With recent trends towards public/private sector partnership, environmental stewardship goals, and social accountability, and the popularity of corporate social responsibility principles, Responsible Tourism has become an important means for tourism companies to ensure long-term viability for their business, differentiate themselves from the market, and support local communities.

SNV's activities within this approach is centred on:

- Facilitating tourism businesses to set up inclusive and pro-poor supply chains and sourcing mechanisms
- Encouraging inclusive hiring practices and employee benefit programmes
- Assisting tourism businesses to access sustainable tourism certification criteria and integrate those in their operations
- Supporting tourism businesses link up to inbound markets and businesses based on their responsible tourism products

Within the described approaches SNV pays special attention to:

Tourism Value Chains

SNV uses Value Chain Development as a way to analyse how to improve participation and inclusion of marginalised people within the economy. The tourism value chain identifies the sequence of multiple and complex products and services across sectors that are delivered to tourists. This helps SNV pinpoint market-based solutions to improve opportunities and earnings for the poor. For example, local fruit and vegetable farmers can be linked to an international hotel chain, and handicraft producers can improve their design and market share.

Policy and strategy development, tourism governance

SNV collaborates closely with national, provincial and regional tourism authorities, enabling them to develop sustainable tourism in their environment. We do this at many levels: policy, legislation, regulations, planning, sustainable indicators, HR development, accreditations, and national marketing and promotion. SNV works with tourism business associations, training institutes and NGOs to improve their capacities to support tourism enterprises and local communities.

Foreword

In a world of change, one constant in the last twenty-five years has been the sustained growth of tourism both as an activity and an industry. Estimated to comprise US\$5,890 billion, or 9.9% of the total world GDP, and employing more than 22 million people in 2008 (UNWTO 2008), it is clear that tourism is a major force in the world economy, an industry of global importance and significance.

In recent years tourism has been increasingly recognised for its potential to contribute to poverty reduction. Its geographical expansion and labour intensive nature support a diversification of employment, and can be particularly relevant in remote and rural areas, where 75% of the two billion people in extreme poverty live. Tourism is particularly significant for developing economies, which receive an estimated 30% of global tourism expenditure and remains as a major export sector of many developing countries and is the primary source of foreign exchange earnings in 46 of the 50 Least Developed Countries (LDCs). In addition, tourism is exceptional in that it brings the market to the product, turning remote or under-developed destinations into economic assets. However, if not managed properly, tourism can have significant negative impacts on the environment and host communities.

Accordingly, SNV Netherlands Development Organisation has identified Tourism as one of 9 priority sectors where we have teams of specialist advisers working in 20 countries throughout Africa, Asia, Latin America and the Balkans. We work to strengthen the capacity of local organisations from the public, private and NGO sectors to more effectively promote and support sustainable economic development, job creation and poverty reduction through tourism. Pro-active engagement with the business community is a vital component of SNV's work, and through programmes such as the Responsible Travel Nepal initiative, and the National Rural Community Based Tourism Programme in Peru, our advisers are combining capacity-building with market incentives to promote, support and reward responsible and sustainable businesses in tourism. Although interventions vary considerably in scale (national/regional), focus (destination development/private sector development) and stakeholders (destination management organisations/local private sector), these initiatives have a common agenda: developing commercially viable interventions that contribute substantially to poverty reduction.

However, a common challenge facing tourism entrepreneurs in developing countries is the lack of access to accurate market data and analysis which they require to compete effectively in international markets. To address this need, SNV tourism teams from Ecuador, Peru, Bolivia, Nicaragua, Guatemala and Nepal jointly commissioned the Centre for Responsible Travel (CREST) to analyse **'The Market for Responsible Tourism Products in Latin America and Nepal'**, and it is with great pleasure that we can now present the results of that research in this report.

We are sure that the data and analysis will prove a valuable resource for tourism entrepreneurs in Asia and Latin America, and will also serve as a useful tool for SNV tourism advisers and their national partners who are working so hard to promote socially responsible and environmentally sustainable tourism practices across the globe.



Andy Wehkamp
Regional Director
SNV Asia

Acknowledgements

We would like to express our sincere thanks to David Krantz and all the team at CREST for their excellent work, and to all those SNV Advisers who contributed to the project. Specifically, we would like to thank SNV Advisers in Latin America namely Sandra Doig (Peru), Marcello Notarianni (Nicaragua) and Scarlet Illanes (Bolivia). As for the SNV Nepal team, we would like to thank Paul Stevens and Araceli Lloret. Special thanks go to Monica Oliveros (Nepal) and Julisa Chavarria (Nicaragua) for coordinating the entire research project. Last but certainly not least we would like to thank Maria Jose Zapata and Hendrik Wintjen who have nonetheless left SNV but continue to be pioneers in promoting responsible practices in the tourism industry.

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Executive Summary

The purpose of this study is to provide market data and strategies to assist tourism businesses and networks in Nepal and six Latin American countries (Nicaragua, Honduras, Guatemala, Bolivia, Ecuador, and Peru) where SNV is involved in initiatives aimed at strengthening responsible tourism. Broadly stated, this report examines the consumer and industry demand and major trends for responsible tourism in key outbound countries (or source markets) in Europe (Germany, the Netherlands, Spain, and the United Kingdom) and North America (United States and Canada). It assesses the similarities as well as the country specific characteristics of the source countries. It then analyzes six distinct product segments or tourism sectors (Nature-based, Cultural and Community-based, Volunteer and Educational, Backpackers and Youth, Adventure, and High-end) and assesses the responsible tourism components within each of these sectors. Based on these findings, the study delineates a wide range of marketing tools, techniques, and strategies that companies and destinations can use to grow tourism, not simply in numbers but also in the quality of tourists, i.e., by working to attract the responsible tourism components from each of the product segments.

The study begins (Section 2) with a discussion of key tourism terminology and the major trends affecting responsible tourism. The authors note that the confusing array of tourism terms can be divided into two categories: 1) those that define market (or product) segments, are motivation based, and describe the type of tourism or traveler (nature, adventure, cultural tourism, etc.) and 2) those that define the impact of tourism and are ethical based, that is, they are all grounded (with slight variations in meaning and emphasis) in environmental and social principles and best practices. These ethical value terms (ecotourism, sustainable tourism, responsible tourism, etc) offer an alternative to the conventional market segments and have led to efforts, begun in the late 1970s with the origin of ecotourism, to conduct tourism in ways that bring benefits to both conservation and host communities. Responsible tourism is the ethical based term chosen for this study because it fits within all six product segments examined here. It is used, for instance, on one-third (32.7%) of the 110 tour operator websites examined in this study - far higher than any other ethical based terms.

The study looks at a range of global trends affecting, positively and negatively, the tourism industry and specifically the market for responsible travel. In the current economic recession, Backpacking/Youth and Educational/Volunteer tourism have remained strong, and responsible tourism appears to be doing slightly better – or less worse – than the tourism industry as a whole. Significant global trends that are supporting responsible travel are the growth of long-haul travel; rapid expansion of Internet travel planning and bookings, “Travel 2.0” online travel communities and forums; and increasing consumer demand for travel that offers authenticity, connections with nature, environmental stewardship, and personal growth. However, other trends - desire for escapism and fantasy, time constraints, and recently the “Don't fly” movement, work against the growth of responsible tourism.

Section 3 looks at the characteristics of responsible travel consumers and of the six source markets in Europe and North America. It finds that responsible travel consumers actively plan their holidays, seek interactive learning experiences, and travel “with a purpose” that can include travelers' philanthropy or volunteering. The profiles of responsible travelers from Europe and North are similar in a number of ways: they tend to be well educated, include all age groups (with greater concentrations among youths and retirees), are equally divided between men and women, have higher than average amounts of disposable income, come mostly from urban

areas, and travel beyond major cities. In absolute numbers, North Americans are the largest group of travelers to Latin America, but the Spanish market is increasing and the British remains strong. Between 2000 and 2006, Nepal and Ecuador showed declines in international, while the other five destinations showed increases, with Guatemala and Peru growing most strongly. From the six source market covered in this study, tourists going to Nicaragua have grown at the highest rate, while visitors to Nepal have declined from all countries except Spain.

In addition to these similarities, the study finds that the six source markets also have their own peculiarities. For instance, vacation time for workers in Europe and North America varies widely, from a low of 14 days in the U.S. to a high of 37 days in France. Of these markets, the U.S. sends, in absolute terms, the most tourists to Nepal and the six Latin American countries, but because they are time-starved, most go to Latin America. U.S. residents also book well in advance and prefer pre-packaged tours; luxury ecotourism is the fastest growing sector for conscientious U.S. travelers and is remaining relatively strong despite the economic downturn. For Canadians, overseas travel and spending on vacations have both increased in recent years, buoyed by a strong Canadian dollar and more retirees with leisure time; but the recession is now causing a decline. For Canadians, Central America (and the Caribbean) are popular packaged holiday destinations, while travel to South America and Nepal is relatively low.

Of the European source markets, Germany has, per capita, the world's largest outbound market, and Germans are highly experienced travelers who are most likely to purchase carbon offsets, seek more stimulating travel, and expect tourism companies to offer environmentally and socially responsible products. With annual leave of five to six weeks, Germans are more likely to take long-haul holidays, although Germany ranks lower than the U.S. and U.K. in travel to Nepal and the six Latin American countries. The Dutch are also experienced travelers, with a very high propensity (81%) to travel abroad and a preference for sun and beach holidays. They seek good quality and high value for cost and are interested in responsible tourism products and destinations, but given the small population of the Netherlands, Dutch comprise only a small portion of arrivals in Nepal and Latin America. Spain is the world's second most popular inbound tourism destination and Spaniards, until recently, have had less interest in traveling internationally than their European counterparts. However, an increase in recent years of low cost airlines and cruise ships servicing Spain has boosted (until the recession) foreign travel, with Latin America, particularly Ecuador and Peru, growing most strongly. Finally, the British are savvy, experienced, and avid travelers, who regard holidays as a necessity rather than a luxury and view responsible and ethical travel as important. Within the EU, U.K. ranks just behind Germany in visits to developing countries. Latin America is a popular destination, with Nicaragua, Guatemala, and Peru all growing substantially; travel to Nepal has, however, dropped.

Section 4 covers the six product segments, beginning with a discussion of the similarities, especially in marketing to responsible travelers. These product segments are all tailoring at least some of their offerings to meet customer demands for authenticity, dynamic and interactive experiences, and environmentally and (to a lesser extent) socially responsible practices. There is great variation; however, in terms of price from Backpackers to High-end, with the other segments - Nature, Adventure, Cultural, and Educational -- all offering a range from budget to luxury. All product segments are utilizing a wide range of marketing channels to reach international customers, including responsible travelers. In order to maximize outreach to consumers, this study recommends using intermediaries such as outbound tour operators and travel agents, guidebooks, Internet sites, and online wholesalers (Expedia.com, Orbitz, Travelocity, etc.). Of the traditional channels, direct mail, travel shows, and media advertising are expensive so are being used more selectively or for targeted audiences. Word of mouth

marketing by satisfied guests remains a prime source of new and repeat customers. While many companies advertise their CRS policies and practices, they recognize that they must focus first on health and safety, service, and value for price. Environmental and social policies and management become important to consumers only after these basic concerns are addressed.

The report next highlights the distinguishing characteristics of the six product or market segments that are most relevant to the target destination countries:

Nature-based Tourism (including ecotourism) accounts for 20% - 40% of international tourists. Demand is expected to remain strong as more urban dwellers seek authentic and natural experiences and want to see exotic destinations and endangered species. Due to the influence of ecotourism within this segment, consumer interest is strong for tourism companies to adhere to responsible practices.

Cultural Tourism and a specific form, **Community-based Tourism (CBT)**, have been growing rapidly in developing countries. Long-haul cultural trips are becoming more popular for both mainstream 'soft' sightseeing and niche markets with an emphasis on deeply engaging with local cultures. Cultural tours are offered at a range of prices. More than any other, this segment brings travelers into close contact with people in the host destination and therefore clear standards are needed to ensure that the tourism protects culture and contributes to poverty alleviation. CBT, where businesses are owned and operated by local residents, has the greatest potential of providing local benefits. However, because CBT businesses are challenging to operate successfully, partnering with NGOs or the private sector is often essential for quality control, marketing, and best practices training that conform to the Global Baseline Criteria and other sustainability and quality standards.

Volunteer and Educational Tourism are holidays that incorporate (unpaid) volunteer and (not-for-credit) learning activities in the host community as part of the vacation experience. This type of 'give back' vacation is growing rapidly, driven by the popularity of gap year breaks among students and career breaks among professionals. It includes all ages (but particularly youths), time frames (from a few hours to several weeks or longer), and price ranges. There are many models, from resort chains that offer short term volunteer opportunities, to tour operators who have created special divisions devoted to volunteer and educational holidays, to NGOs and community projects which are partnering with tourism businesses to offer learning or volunteering opportunities. While most organizations and businesses have a CSR policy, there are as yet no defined standards for volunteer or educational tourism.

Backpackers and Youth Tourism are growing rapidly and taking on new dimensions. Youth travel (15 - 26 years) is one of the largest tourism segments, with 70% traveling with a purpose (to learn a language, about another culture, volunteer, etc.) and a majority saying they try to travel in more responsible ways and to think about issues such as social justice, poverty, and the environment. Youth travelers average over 7 trips a year, over 80% use the Internet as their main source of trip information, and nearly half visit destinations outside major gateway cities; they are more apt to become involved in philanthropic or volunteer activities, and are less deterred by negative events like terrorism or natural disasters. Backpackers, characterized by low-budget, independent travel, constitute one-quarter of youth travelers. Both categories are undergoing changes as more women travel independently and more 'mature' youths (over 26 years) seek less rugged experiences, modes of transport, and accommodation; backpacks today typically contain laptops, credit cards, and cell phones.

Adventure Tourism or outdoor travel that involves some risk and physical exertion has also been growing rapidly. In general, adventure travelers are higher income earners, evenly split between men and women, and socially and environmentally aware. In response, a number of providers are incorporating responsible tourism principles and best practices into their operations. The majority of international adventure travelers are from North America, and South America ranks as the top adventure travel destination. In Europe, adventure travel is also popular, especially for Germans. While youths remain the largest portion, today more women and Baby Boomers are adventure travelers and frequently there is cross over with Nature, Youth and other segments. Adventure travel, more than other market segments, is susceptible to economic conditions, and is falling in the current recession.

High-end Tourism or the luxury travel sector is distinguished by its price tag (U.S.\$300 - \$3000/day), personalized service, and high quality accommodations, aesthetics, activities, and amenities, even in remote destinations. A growing number are both affluent and conscientious consumers who want to travel responsibly, and operators in this sector generally have the resources and staff to implement environmental and social best practices. Many luxury tourism companies encourage guests to offset their carbon footprints and promote travelers' philanthropy through guest and sometimes company support for community projects and conservation organizations. High-end tourism, as a specialized niche market, is frequently featured in the travel media. Word of mouth referrals and repeat clients make up a large portion of High-end tourism. This segment appears to be less severely hit by the economic recession because its clients have the means and feel the need to travel, although many companies are offering promotions such as extra attractions or an extra night's stay.

Section 5, Marketing Recommendations, identifies a mix of marketing tools and strategies that can help companies and destinations use their limited resources to maximize their return. The first recommendation is to use intermediaries – guidebooks, the Internet, tourism associations, and outbound operators in Europe and North America – to help market to consumers. In addition, word of mouth advertising remains an important tool for generating new and repeat customers. Secondly, businesses and destinations need to develop marketing plans to target international visitors through appropriate traditional and online distribution systems. Plans should include clear business objectives and marketing messages; assessments of the current market, the key market segment(s), and the outbound countries to be targeted; and an action plan, budget, and monitoring and evaluation tools. They should also assess if the tourism products being offered are ready for the international market.

Third, it is essential to leverage the media in order to gain international and cost-effective publicity. This can be done through cooperative promotion with other companies, cultivating relationships with key journalists, hosting media trips, preparing media kits, ensuring coverage in guidebooks, and applying for international sustainable tourism awards. It also involves utilizing low cost advertising via the Internet and digital marketing, websites, online databases, and new media technologies, including search engine optimization. Finally, it is important to market as well to the regional and domestic travelers who can help provide a buffer during periods of downturn in the international travel.

Finally, Section 6 boils down much of the previous discussion into a succinct summary of 10 key marketing points to be used by companies and destinations in Nepal and the six Latin American countries. These include giving consumers and supply chain partners high value for money service and experiences; marketing through intermediaries; ensuring the product is ready for the international market; targeting the international, region and domestic markets; utilizing free and low cost communications outlets and new media technologies; developing an attractive and easy to use website; seeking independent endorsements; and highlighting responsible tourism practices.

The study concludes with Appendices designed to be of use to the reader. Appendix I is a matrix of all the outbound tour operators examined for this study; it indicates which companies were interviewed, which markets they serve, which destinations they go to, and which product segments they offer. Website and contact details are also provided. Appendix II is selected international tourist arrivals by country. Appendix III is an analysis of leading guidebooks, and Appendix IV is a resource list designed to help destinations and businesses quickly implement the marketing recommendations in Sections 5 and 6.



SECTION 1

**Introduction, Key Definitions
and Market Trends**

Introduction, Key Definitions & Market Trends

1.1 Objectives

SNV Netherlands Development Organisation conducted this research assignment with the aim of developing a better understanding of the market for 'responsible tourism' in key European countries (Germany, the Netherlands, Spain, and the United Kingdom) and North America (United States and Canada). The purpose is to provide an assessment of consumer demand for responsible tourism in these outbound countries and, based on this analysis, offer marketing strategies for tourism businesses and networks in Nepal and six Latin American countries (Nicaragua, Honduras, Guatemala, Bolivia, Ecuador, and Peru).

For a number of years, SNV has been involved in initiatives aimed at strengthening 'responsible' tourism businesses in Nepal and Latin America. While these initiatives have varied in their scale (national / regional), focus (destination development / private sector development) and actors / clients (destination management organisations / local private sector), they have a common denominator: to develop commercially viable tourism businesses and networks that contribute to poverty alleviation and environmental protection. As a result, SNV commissioned the Center for Responsible Travel (CREST) to conduct this research in an effort to help these target countries and their responsible tourism businesses improve their access to outbound market information and promotional resources.

The tasks and goals of this market research study are to:

- Characterise the end consumers of responsible tourism products, explaining who they are, their characteristics, and their purchasing behavior.
- Analyse the responsible travel market by product segment, discussing:
 - the definition of the product segment and characteristics of the products,
 - the position and price in the market,
 - the promotional strategies used in each segment
 - the distribution channels used to reach consumers, and
 - the standards applied to the products.
- Detail recommendations on how to most effectively and efficiently promote 'responsible tourism' products with specific recommendations on how to leverage media, reflecting very limited marketing budgets and resources.

Although this research is focused on the specific outbound markets and the destination countries designated by SNV, the research, broadly speaking, will be useful to all those in the responsible tourism market.

1.2 Research Methodology

The methodology for this study required two approaches:

- Desk research (including meta-analysis of existing surveys and studies from selected outbound markets of consumers for responsible tourism)
- In-depth interviews (with tour operators and experts in responsible tourism from selected outbound markets).

a) Characterization of Consumers

'To examine the characteristics of final consumer of responsible tourism products'- we:

- Carried out a review of the current literature available on consumers of responsible tourism products
- Used Internet research to find currently available market data on responsible tourism consumers.
- Conducted a meta-analysis of the available data, and extrapolated information to compile a general consumer profile (and if possible, a regional profile of end consumers going to specific destination countries).
- Integrated demographic and psychographic information from interviews with tour operators with responsible tourism products.

b) Responsible Tourism Product Segments

'To identify and assess the 'responsible travel' market,' - we first identified specific responsible tourism product segments. These segments were:

- Nature-based tourism
- Cultural tourism (with community-based tourism)
- Volunteer tourism and educational Tourism
- Backpackers and youth
- Adventure tourism
- High-end tourism

In-depth Interviews

We then built on the meta-analysis of current market data with Internet research and in-depth interviews with tour operators in both European and North American markets that provide products in any of the destination countries specified in this report.

Interviews were conducted with 21 tour companies (several of which operate internationally; 10 North American based, and 11 European based). Interviews were semi-structured with open-ended questions. In each interview, we asked the respondents to provide information on the demographics and psychographics of their customers, to identify the current marketing and distribution channels used, to discuss how they select inbound or ground operators in destination countries, to define the product segment in which they offer products, and provide information on their responsible or sustainable tourism practices. The interviews do not represent a critical mass of tour operators, rather the interviews verified the information presented in this report and informed some of the recommendations in Section 5. Permission was granted by some interviewees to be quoted directly in the study but most interviews were conducted on the assumption of anonymity. For a listing of companies interviewed for this study, please see Annex I.

Criteria for Selecting Tour Companies

The list of potential interviewees were selected based on preliminary web research to determine if their company meets the 'Global Baseline Criteria for Sustainable Tourism' as outlined on www.sustainabletourismcriteria.org. Organizations that had a corporate social responsibility policy or an 'ethics' or 'responsibility' statement were reviewed. In addition, potential companies to interview were selected because they provide trips to at least one of the destination countries profiled in this report and because these trips fall into the identified responsible tourism product segments. In total, we compiled a database of 110 outbound tour operators have offices in Europe, North America, and / or Australia (see Annex I). Approximately half operate in North America and half operate in Europe (57 U.S. and Canada, 41 U.K., 25 the Netherlands, 17 Germany, and 8 Spain). These tour operators provide tours in at least one of the selected destination countries.

Shortlisted tour companies were contacted for interviews with specific requests to speak to knowledgeable personnel in the marketing department or with detailed knowledge of their customer base.

In addition, we identified associations in North America and Europe that include tour operators with a focus on responsible and sustainable tourism, or were members of such organizations as Tourism Concern, Sustainable Travel International (<http://www.sustainabletravelinternational.org/>) or Responsibletravel.com.

Promotional Strategies Imagery Section

To gain a better understanding of the promotional strategies used by tour operators we examined patterns in the imagery presented on tour operators' websites. The research team identified categories of images that commonly emerged; these were: On-site Tourism Facilities and Activities, Native/Local Peoples, Flora & Fauna, and Natural/Cultural Landscape. Then we tallied the number of times images occurred in each category. We selected images that were representative of the pattern from three tour operators targeting each outbound market (N. American and European).

1.3 Key Definitions

Today there is a wide and often confusing array of terms describing various types of tourism. Broadly speaking, they can be divided into two basic categories:¹

1) Terms that describe what the tourist does and/or where the tourism takes place. They describe the type of tourism (adventure, nature, cultural, cruise, resort, etc) or the type of traveler (High-end, backpack, educational). Collectively these terms comprise the tourism industry's market segments and they are neutral in terms of the impacts of tourism. The basic or root term in this category is "tourism" which is defined simply as "Travel for recreational, leisure, or business purposes."

2) Terms that describe the impact of tourism and are based on ethical values. These terms (ecotourism, sustainable tourism, pro-poor tourism, green tourism, geotourism, responsible tourism, etc.) are not simply niche markets or segments within the tourism industry. They are grounded in environmental and social principles and good practices. They posit that, done well, tourism can be beneficial to host communities, for conservation, and for the traveler. While each of these terms has particular nuances - for instance, pro-poor tourism emphasizes impact on host communities and on poverty alleviation, while geo-tourism emphasizes impact on an entire destination. The oldest of these terms, "ecotourism", is the basic or root term out of which these other ethical based terms have grown. Ecotourism is defined by The International Ecotourism Society (TIES) as "Responsible travel to natural areas that conserves the environment and improves the welfare of local people."

These ethical value terms offer an alternative, both in theory and in practice, to the tourism market segments in the first group. These ethical tourism terms have facilitated the rise of new and dynamic ways of doing tourism that are more socially responsible and environmentally sensitive. Therefore, today we often see an overlay of the market segment terms with the ethical value terms: Nature-based ecotourism or High-end responsible tourism, for instance.

This study looks at both the first and second tourism categories. It identifies and examines 6 market segments that are important to both the sending and receiving countries (Nature-based Tourism, Cultural Tourism and Community-based Tourism; Volunteer Tourism and Educational tourism, Backpackers and Youth, Adventure Tourism, and High-end Tourism) and it evaluates the

responsible tourism portion of each of these. Responsible tourism is the ethical value term chosen for this study because its principles and practices can be most readily examined within all market segments, both those that describe what the type of tourism and the type of traveler. Table 1 outlines some of the most common types of tourism in both categories.

Table 1: Typology of Tourism - Definitions²

Category 1	Market Segments
Tourism	Travel for recreational, leisure, or business purposes.
Mass tourism	Providing leisure activities to large numbers of people at the same time. Coastal resorts and cruises are popular forms of mass tourism.
Nature-based tourism	Any form of tourism that relies primarily on the natural environment for its attractions or settings.
Adventure tourism	A form of nature – based tourism that incorporates an element of risk, higher levels of physical exertion, and often the need for specialized skill.
Urban tourism	The consumption of city spectacles (such as architecture, monuments, and parks) and cultural amenities (such as museums, restaurants, and performances) by visitors. ³
Category 2	Ethical based Terms
Ecotourism	Responsible travel to natural areas that conserves the environment and improves the welfare of local people.
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.
Pro-poor tourism	Tourism that results in increased net benefit for the poor people.
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 meets the needs of present tourist and host regions while protecting and enhancing opportunities for the future.

Source: Zoe Chafe, 2005

Origin of Tourism Terms

The term "tourism" - describing travel as a leisure activity—first appeared in the Oxford English Dictionary in 1811, but the concept goes back as far as the ancient Greeks and Romans, whose wealthy citizens vacationed at thermal baths and explored exotic places around Europe and the Mediterranean region. Early travel was often combined with religious pilgrimages, scientific investigation, geographic exploration, cultural and anthropological study, human and resource exploitation, or conquest, but from the beginning travelers have also sought out places of natural beauty for exploration and relaxation. Until the second half of the twentieth century, the number of travelers was small and their pace was slow. They traversed the globe by foot, sailing boat, horse, mule, and camel and, more recently, by ship, train, car, and plane.

Nothing has altered tourism as profoundly as the airplane. Air travel for pleasure dates from 1948, when Pan American World Airways introduced tourist class. Mass international tourism really took off with the opening of commercial airplane routes between the United States and Europe, and in 1957, jet engines made air travel more accessible to the public. Not until the 1970s, with the advent of wide-bodied, high-speed airplanes, did Third World destinations come within reach of many people. In the mid-1970s, 8% of all vacationers traveled from developed to developing countries; by the mid-1980s, the number had jumped to 17 %, by the mid-1990s it had climbed to 20 %, and after 2000, Asia, Africa and the Americas continued to grow more rapidly than mature markets in Europe and North America. Between 1992 and 2004, the number of international tourists worldwide grew from 463 million to 763 million, and according to the UNWTO, by 2020, will reach 1.56 billion.⁴ In addition, four to five times as many people travel domestically, within their own countries.

But with the increased tourism numbers have come increasing problems. Although mass tourism was originally embraced by many countries as a “smokeless” (nonpolluting) industry that could increase employment and gross national product, evidence quickly grew that its economic benefits were marginal and its social and environmental costs could be high. Much of the money did not stay in the host country, and often the only benefit to the local community was found in low-paying service-level employment as maids, waiters, and drivers. Mass tourism often brought overdevelopment and uneven development, environmental pollution, and invasions by culturally insensitive and economically disruptive foreigners. In 1980, popular opposition within developing countries crystallized into a strongly worded statement drawn up at a conference in Manila convened by religious leaders. The Manila Declaration on World Tourism stated unequivocally that “tourism does more harm than good to people and to societies in the Third World.” The Ecumenical Coalition on Third World Tourism, founded at this meeting,⁵ became a leader in the fight against sex tourism and other forms of exploitation and calls for a new type of tourism. Over the past four decades, mass tourism has become synonymous with the “four S’s,” sun, sea, sand, and sex, and has given rise to derogatory—and often accurate—stereotypes of the typical tourist.⁶ Host countries, as well as tourists, began growing disappointed with this type of tourism.

Turned off by overcrowded, unpleasant conditions and spurred by relatively affordable and plentiful airline routes, increasing numbers of nature lovers began seeking serenity and pristine beauty. Between the late 1970s and mid-1980s, the new field known as ecotourism gradually took shape. It began in isolated experiments around the globe and its historical roots, which, broadly stated, can be traced to four sources: (1) scientific, conservation, and nongovernmental organization (NGO) circles looking for more effective ways to protect parks and biodiversity as well as indigenous peoples; (2) multilateral aid institutions needing to ensure tourism helped to reduce poverty and promote conservation ; (3) poor countries seeking a type of tourism that was a more effective development model; and (4) the traveling public, a portion of whom was increasingly disenchanted with mass tourism and looking for more engaged and authentic holidays. Almost simultaneously but for different reasons, the principles and practices of ecotourism began taking shape within these four arenas, and by the early 1980s, the concept had coalesced into a new genre of environmentally and socially responsible travel. By the 1990s, ecotourism was said to be the fastest growing sector of the tourism industry, increasing between 20% and 34% annually while the tourism industry globally was growing at a rate of 9%. In 2002, the United Nations declared the International Year of Ecotourism and the United Nations Development Programme (UNEP) and UN's World Tourism Organization, together with TIES, organized a series of regional forums, culminating in the World Ecotourism Summit, held in Ottawa, Canada.⁷ This signaled that ecotourism, which began as an innovative idea in the late 1970s had, by the new millennium, put down deep roots and taken on global significance. Today,

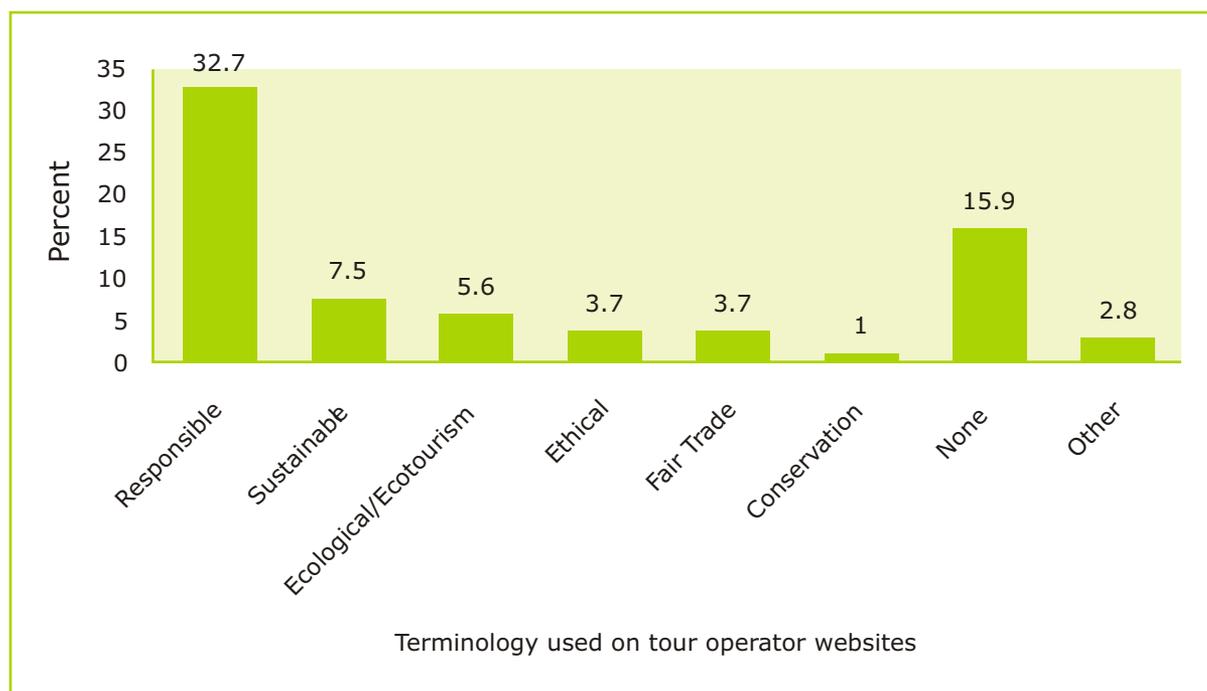
nearly every country with a tourism industry is also promoting ecotourism. Hector C  ballos-Lascur  in, Mexican architect and ecotourism expert summed up the changes in a 1999 speech: "Ecotourism is no longer a mere concept or a subject of wishful thinking. On the contrary, ecotourism has become a global reality... There seem to be very few countries in the world in which some type of ecotourism development or discussion is not presently taking place."⁸ Indeed, by 2005, the UNWTO reported that nature and ecotourism were growing 3 times faster than tourism industry.

In the wake of the rise of ecotourism have come, as well, a bevy of new ethical tourism terms - "responsible," "sustainable," "green," or "low-impact" tourism,⁹ "pro-poor tourism" and "geotourism" -that are complicating the picture and confusing the public.¹⁰ While each has its own nuances, all are variations on the same theme of environmental, social and economic sustainability. What is important is to look at the principles and practices behind the terminology.

Terminology commonly used

The terminology used to describe the type of travel was examined on 107 outbound tour operator websites. The assessment found that the most frequent terminology used (on English sites) in reference to the company and products is "responsible" in use by 32.7% of the tour operators. This was followed by "sustainable" used by 7.5%, "ecological/ecotourism" by 5.6% and "ethical" and "fair trade" terminology used by 3.7% of the tour operators (Figure 1).

Figure 1: Terminology most commonly used in English to generally describe type of "responsible" service or product offered by selected tour operators. 107 tour operator websites were examined in total.



Source: CREST, 2009

In Spain, the English terminology translates well and similar phrases carry the same distinctions. For example, turismo responsable, turismo sostenible, turismo comunitario, and ecoturismo all carry the same meaning as their English language counterparts.

The term turismo solidario, however, does not appear to have a direct English equivalent and refers to tourism in which the motivation is to visit “espacios solidarios” or those in which development projects or local communities have a significant role in the productive process. Turismo solidario may include bringing supplies to support locals at the destination in developing countries. Table 2 is a listing of Spanish language terms and the frequency with which they appear in a search on www.google.es

Table 2: Frequency of Matches in Google.es for Popular Spanish Terms Related to “Responsible Tourism Products and Services.

Terminología en www.Google.es	
GEOTURISMO	48.400
ECOTURISMO	3.140.000
TURISMO RESPONSABLE	70.200
TURISMO DE AVENTURA	2.040.000
TURISMO COMUNITARIO	40.100
VOLUNTARIADO TURISTICO	283
TURISMO DE VOLUNTARIADO	684
TURISMO SOLIDARIO	62.000
TURISMO CULTURAL	1.520.000
TURISMO EDUCACIONAL	9.390
TURISMO CIENTIFICO	21.800
TURISMO SOSTENIBLE	263.000
TURISMO JUSTO	11.700
TURISMO SOCIAL	198.000
RSE	3.850.000
RESPONSABILIDAD SOCIAL EMPRESARIAL	372.000
RSC	8.190.000
RESPONSABILIDAD SOCIAL CORPORATIVA	432.000
TURISMO ALTERNATIVO	299.000

Note: Google.es search conducted by CREST, April 18, 2009.

1.4 Major Trends Affecting Responsible Tourism

There are a number of major international trends that affect the responsible tourism market. These trends are not necessarily linked to one another but taken as a whole; they are helping to shape responsible tourism, as well as the tourism industry more broadly. Below is an overview of

the most important trends identified through research and interviews for this study by outbound tour operators selling responsible tourism products in North America and Europe. Most of these trends bode well for responsible travel service providers. The final group of trends are, in our analysis, working against the responsible travel industry and appear to be fuelling growth in some conventional vacation sectors like cruise tourism instead. The first, and most important trend – the current global economic depression – appears to be negatively affecting responsible tourism in a serious way. Sales are down, clients are booking later, and guests are opting for fewer amenities and sometimes shorter stays. Anecdotal evidence suggests, however, that the negative effect may be somewhat less for responsible tourism suppliers than it is for the industry as a whole. It should also be noted that the depth and length of this economic crisis is not yet clear, and therefore its long term impact on responsible tourism cannot be predicted. By volume, tourism products that self identify as “responsible” or that use similar descriptive terms, remain a small proportion of the total global leisure offering. As a whole, however, a confluence of trends makes this a relatively good time to be providing responsible holidays from North America and Europe to Nepal and the six designated countries in Latin America.

World Economic Downturn

In 2009, it appears that all the usual trends and indicators will be dwarfed by the global economic crises. The final quarter of 2008 was one of the worst in history for national economies across the globe, and economic indicators point to continued economic contraction in 2009 and probably beyond. Economists predict deep and long recessions in the United States and Europe that will have tremendous negative impact on the economies around the globe.

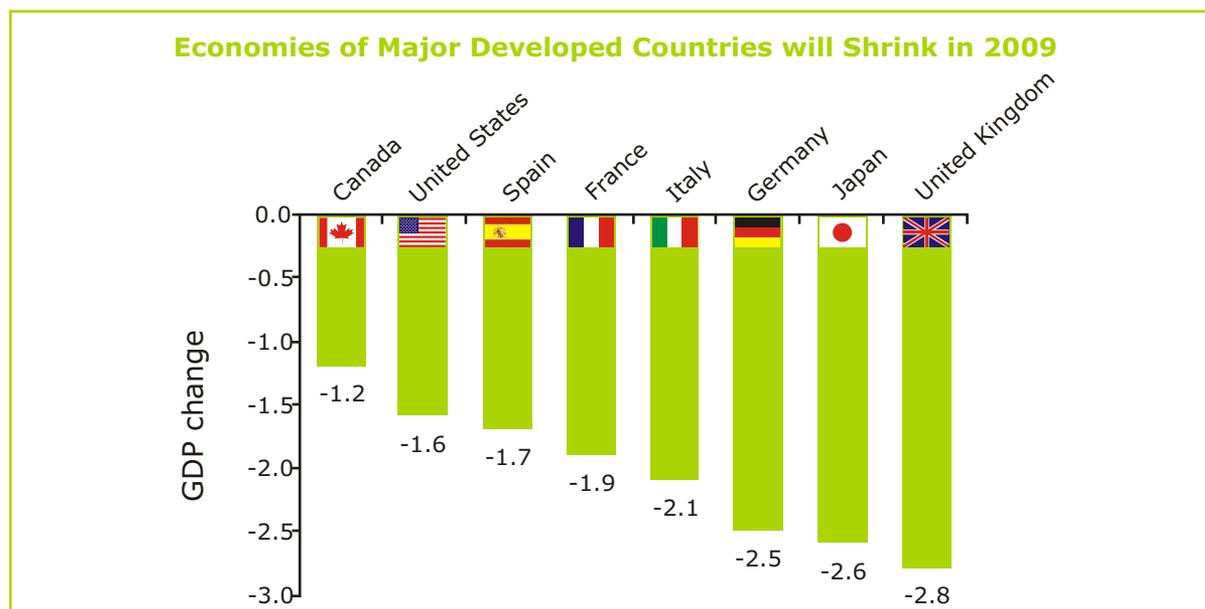
The economic meltdown began in the U.S. and the American market remained the bellwether watched most closely by the rest of the world. While the new Obama administration was ushered in with great expectations from around the globe, in early 2009 the economic crisis continued to worsen. At the end of February, the Washington Post reported, “The prospects for an economic recovery by year's end dimmed yesterday, as government data showed that the [U.S.] economy contracted at the end of 2008 by the fastest pace in a quarter-century.”¹¹

In Europe, 16 of the 27 European Union countries share the euro as their common currency. Their individual economic performances vary considerably, but the eurozone as a whole has been in recession since September 2008 and is forecast to shrink by 1.9% in 2009. Unemployment in the Euro area is expected to exceed 10% in 2010, up from 7.5% in 2008.

Germany's economy, which accounts for about a third of eurozone output, is predicted to shrink by 2.25% in 2009. This would be its worst performance in the post-World War II era. This news has come as a shock to many Germans, who pride themselves on their fiscal rectitude, unlike the free-spending, highly-indebted British and U.S. residents. However, Germany's export-led economy has been relying on demand in other countries, which has now dried up because of the global slowdown.¹²

The International Monetary Fund (IMF) predicted that Britain would suffer the worst contraction among advanced nations in 2009, with its economy predicted to shrink by 2.8%. The Bank of England cut interest rates in January to just 1% in a bid to help the British economy out of recession, while unemployment is now at 1.97 million - the highest level since 1997 (Figure 2).¹³ According to data assembled by the Economic Policy Institute, of the outbound countries included in the study, Canada will be impacted less and U.K. the most by the economic crisis.¹⁴

Figure 2 : Projected Decline in Major Economies of the World in 2009.



Source: Projections of percentage GDP change from an Oct. 2008 baseline, compiled by EPI from IMF data.

The economic crisis is hitting the tourism industry hard. "Fasten your seatbelts as the travel industry is facing strong headwinds," writes Ipsos' Travel and Tourism division. According to a survey they conducted among U.S. adults, "Both business and leisure travel are expected to see deepening shrinkage in 2009." The survey shows four in ten (39%) business travelers are saying that the financial crisis will cause them to reduce their overall business trips and/or expenditures, and just over half (52%) of leisure travelers plan to reduce their overall leisure trips and/or expenditures, compared to 2008. Finally, this survey indicates that travelers intend to reduce expenditures in several ways: 66% plan to reduce expenditures on meals and entertainment, and 58% plan to shorten their stay.¹⁵

Despite all of the very bad economic news, interviews for this study revealed that outbound tour operators selling responsible tourism experiences to U.S. and European consumers were cautiously upbeat. All of them conceded that the global economic slowdown would probably hurt business in 2009 and 2010, but many also felt that they were in a good position to weather the storm. Although a couple of the operators interviewed disagreed, the majority noted that international travel had become such an important part of their clients' lifestyle, that they were unlikely to give it up. "It's not the sort of thing that drops out [of their lifestyle] easily," explained the Marketing Director of one British nature travel firm. Some responsible tourism operators have seen that their customers are traveling on smaller budgets and sometimes have chosen shorter stays or fewer amenities on their trips; but they continue to travel nonetheless. One operator from North America's High-end outbound market explained that she had just finished working with a long-time customer who "didn't opt for our top shelf service this time." She said he decided to shorten his usual holiday package by four days.

Another High-end operator in the U.S. indicated that he is actually getting some new business from wealthy individuals who appear to feel guilty about indulging in the kinds of luxury trips they had taken in the past. He said that some upscale travelers see the choice of overtly 'responsible' or even volunteer vacations as a way to soothe their conscience when others around them people are suffering. This operator further hypothesized that in times of great need, people's generosity tends to come out and this may lead to continued demand for volunteer and other philanthropic travel experiences. "People come together in hard times" he said.

Overall, conditions bode relatively well for responsible tourism within each product segment and for tour operators who are flexible enough to recast and downsize their offerings. "The affordable end is probably holding on better than the upscale products," said one Canadian discount retailer. Two product segments, Backpacking/Youth Travel and Educational/Volunteer are actually reporting that business is very strong and predicting continued demand. Several operators in these segments explained that young people are looking at their dim post-university job prospects in North America and Europe and are choosing instead to travel for extended periods as a way to wait out a slow economic recovery. Others are looking at volunteer vacations and international travel as a kind of resume builder that can help them appear more attractive and well rounded once the economy recovers and they attempt to enter the job market. As one volunteer vacation operator said, "I've got all the business I can handle right now."

While many responsible tourism providers may be cautiously optimistic so far, the recovery timetable for the global economy remains highly uncertain. If the recession continues to deepen in North America and Europe, and if recovery is slower than currently predicted, even the most dedicated responsible travelers may be forced to postpone their long-haul travel plans for several years.

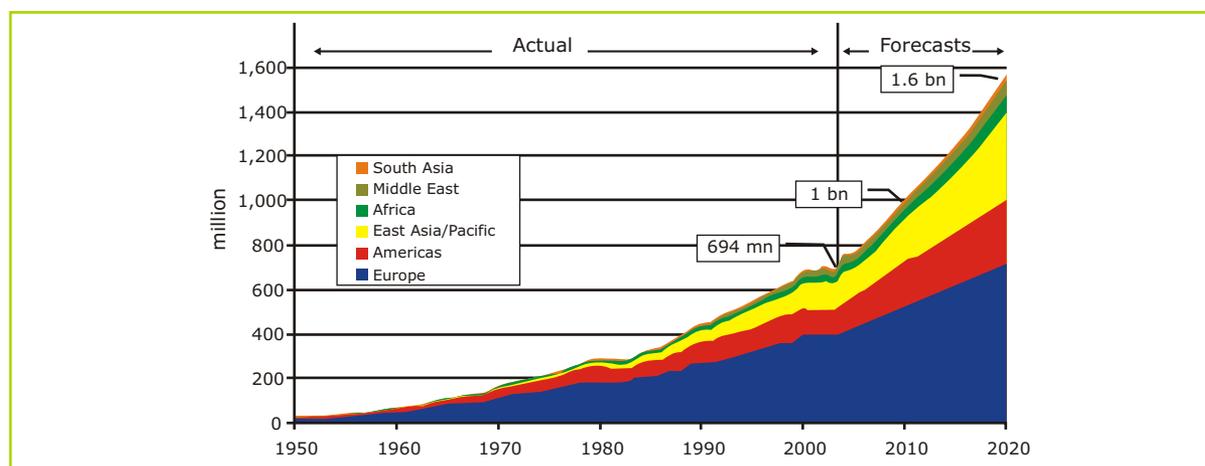
Overall Growth in Tourism and Long-Haul Travel

The recent global economic downturn notwithstanding, there has been tremendous growth in international travel at a macro level during the past ten years, and until the most recent downturn, that growth had been predicted by the UNWTO to continue at about 5% annually through at least 2020 (Figure 3). The UNWTO stands by their forecasts, and has issued this statement on their website with regard to the current slowdown:

*"Although the evolution of tourism in the last few years has been irregular, UNWTO maintains its long-term forecast for the moment. The underlying structural trends of the forecast are believed not to have significantly changed. Experience shows that in the short term, periods of faster growth (1995, 1996, 2000) alternate with periods of slow growth (2001 to 2003). While the pace of growth till 2000 actually exceeded the Tourism 2020 Vision forecast, it is generally expected that the current slowdown will be compensated in the medium to long term."*¹⁶

Tourism is big business, and has been growing fastest in developing countries. In 2007, the World Travel and Tourism Council (WTTTC) estimated that tourism constituted approximately 10% of worldwide GDP, employed 230 million people, and generated some U.S. \$5 trillion.¹⁷

Figure 3 : Actual and Forecast International Travelers.



Source: UNWTO, Tourism 2020 Vision (2003). Re-confirmed, 2009.

Table 3 : Forecast of Tourism Market Share and Growth by Region

	Base Year 1995	Forecasts		Market share (%)		Average annual growth rate (%)
		2010	2020	1995	2020	
		(Million)				1995-2020
World	565	1006	1561	100	100	4.1
Africa	20	47	77	3.6	5.0	5.5
Americas	110	190	282	19.3	18.1	3.8
East Asia and the Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2

Source: UNWTO, *Tourism 2020 Vision (2003). Re-confirmed, 2009.*

The numbers below show that international tourism arrivals grew by 143 million in the three years between 2004 and 2007, which is nearly three times as many as the world total for 1950.

- 1950 – 25 million tourist arrivals.
- 2004 – 760 million tourism arrivals.
- 2007 – 903 million tourist arrivals.
- 2020 – Forecast to reach 1.6 billion international arrivals.¹⁸

Responsible tourism has been riding this wave of strong demand and has been coming out ahead of the curve as demand for the kinds of products where responsible tourism generally occurs (see product segmentation, Section 3) has been growing even faster. In 2008, a Pro-Poor Tourism Report stated that the "growth rate of international travel to developing countries is growing disproportionately compared to arrivals in OECD or EU countries (developed countries) ... Once associated with independent travelers and specialist tour operators and the wealthy, long haul travel is being extended to the mainstream."¹⁹

There are many reasons for this growth, but some of the main ones include steadily reduced long-haul airfare prices; a proliferation of open-skies agreements between outbound markets and long-haul destinations; increased television, print, and Internet exposure to foreign cultures and exotic wildlife; the growth of 'the experience economy' (see major trend number 4, below); and an increased demand for meaningful experiences among travelers.

Use of the Internet and Web 2.0

Evolving and increasingly sophisticated Internet use has been a major international trend that has impacted responsible travel in many positive ways. In January 2008, PhoCusWright reported that 2007 was the first year in which more travel – 51% -- was purchased online than offline in the United States. It projected that the percentage would increase to 60% by 2009. The majority (66%) of U.S. leisure travelers who are airline and hotel users go exclusively to the Internet when planning a vacation, while 57% report making reservations online.²⁰ These numbers underscore the remarkable way in which U.S. consumers have embraced this medium since 2000. That year only 35% of leisure travelers used the Internet to plan travel and just 19% actually made a reservation online.²¹ Forrester Research also predicts that travel will remain the number one online retail category and will grow to U.S. \$119 billion by 2010.²²

European online leisure travel as a percentage of the total travel market approached 25% in 2007, the level achieved in the U.S. in 2004. According to a PhoCusWright study, Germany has widespread Internet access and online purchasing is well established despite a relative aversion to credit card usage, but online travel purchases are relatively rare. In the U.K., where access is also wide spread and online purchasing routine, more than twice as many Internet users buy travel online than in Germany. Italy and Spain have similar profiles, but a much higher proportion of regular Internet users in Spain purchase travel online than in Italy.²³

The web 2.0 phenomenon is characterized by increased online interaction and user-generated content on the Internet. It includes social networking sites like Facebook.com and MySpace.com and other user-generated content sites like YouTube and flickr.com as well as travel related sites like TripAdvisor.com and Lonely Planet's Thorn Tree site. TripAdvisor Media Network, begun in 2000, now receives nearly 30 million monthly visitors and is the largest travel community in the world, with seven million-plus registered members and 15 million reviews and opinions featuring real advice from real travelers.²⁴

A 2008, Euromonitor International study of the web 2.0 phenomenon released at the World Travel Mart in London found that the segment specifically geared towards travel has grown exponentially over the past few years. The "Travel 2.0" concept was first coined in 2003, and refers to the importance of developing online travel communities and forums. "These sites were uniquely driven by travelers interested in the opinions of fellow travelers instead of professional travel companies or guidebooks. Travelers are turning towards direct forms of interaction between others in search of more authentic travel experiences and connections."²⁵

Another Internet phenomenon, blogging, is also growing exponentially. A web log or "blog" is a form of online publishing that allows nearly any individual to post regular entries of commentary, descriptions of events or other content like photographs or videos. Unlike TripAdvisor or Thorn Tree, these sites are self maintained and less centralized, but are seen to be unbiased sources for gathering travel information, and have been growing in importance. According to the YPartnership's 2008 Travel Monitor Study, one out of five travelers has used a "blog" to read a review about a travel service provider. Also, while use of the Internet has stabilized, the number buying online travel is still growing.

The travel networking phenomenon represents the convergence of several trends at play in the travel industry today. These include the impact of the Internet revolution, international social networking, the search for more authentic travel experiences and contact with peer communities. Travel networking websites and activities are expected to grow steadily over the next five years²⁶ and become an even more important tool driving the tourism industry.

Lifestyle Trends Favoring Responsible Travel Forward

There is evidence, as well, that a number of closely related trends are coming together to drive consumer demand in Europe and North America for responsible tourism. They can be identified as including:

Generational shifts: The 110 million members of the baby boom generation (born between 1946 - 1964)²⁷ in Europe and 83 million in North America are entering retirement and find themselves with more leisure time. In addition to controlling 70-80% of the wealth,²⁸ they are living longer than earlier generations and prize more active lifestyles that includes long-haul travel. Many "Gen-Xers" (born between 1961-1981) are environmentally conscious and have embraced conscientious consumerism or 'spending your way to a greener planet'. The "Gen-Y" or 'Millenniums' (children of Baby Boomers born from the early 1980s to 2001) are extremely well informed and passionate about environmental and social justice issues. All of which is driving demand for responsible tourism.

Intergenerational travel (a.k.a. 'traveling in tribes') includes grandparents, parents, and children on the same trip, and as these family units become more contentious consumers as a whole, they are seeking responsible family vacations.

Urbanisation: In addition, many individuals in these demographic categories are experiencing increasing urbanization. Cities of the world, including those in North America and Europe, are growing quickly as more and more people migrate from rural areas in search of employment. The current economic crisis notwithstanding, urban service sector industries in Europe and North America have been steadily picking up the workers that agriculture and manufacturing continue to shed. This is also leading to greater stresses: urban densities, increased traffic, air and noise pollution, and loss of green space. Urban workers spend increasing amounts of time in artificial environments - air-conditioned office buildings, personal cars, high-rise apartments, and in front of computer screens, and wireless devices and this adds greatly to the stress of city-dwelling.

Need to connect with nature: 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 offer a chance to escape from urban environments and busy work lives.

Some urbanites, particularly younger ones, turn to active outdoor adventure travel such as whitewater rafting, mountain biking, climbing, and skiing/snowboarding to both meet the need to reconnect with nature while maintaining their fast-paced lifestyle.

Emergence of experiential tourism: The term Experience Economy first emerged as the title of a book written in 1999 by Pine and Gilmore. In it they describe the experience economy, as the next economy following the agrarian economy, the industrial economy, and the most recent service economy.

Businesses must orchestrate memorable events for their customers, they argue, and that memory itself becomes the product - the "experience". Businesses can charge for the value of the "transformation" that an experience offers. Pine and Gilmore give examples like Starbucks that can charge previously unheard of amounts for coffee because their product isn't merely coffee (which is a commodity) as much as it is the experience of drinking Starbucks Coffee in their chic café.²⁹

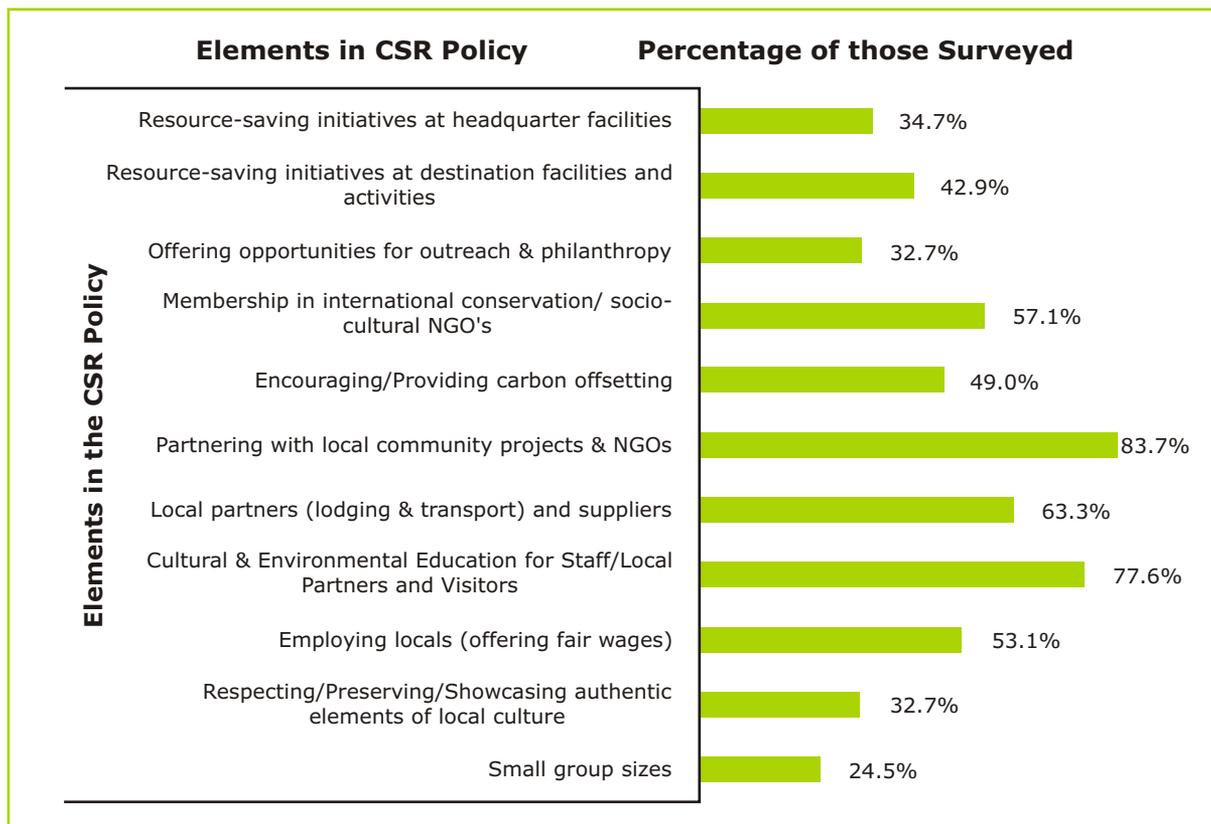
Modern consumers now seek these experiences as part of their habitual consumption patterns, they say, and this is helping drive the growth of experiential tourism - which encompasses responsible tourism product segments that tend to stress experiences over amenities. The UNWTO ranks "experiential tourism" among the sectors expected to grow most quickly over the next two decades.³⁰

Demand for authenticity: But not any experience will do. Another global trend driving growth in responsible tourism products is the search for "authenticity". Modern consumers want authentic experiences. Contrived experiences created by tourism operators, theme parks, cruise lines, resorts, and so on that are based largely around consumption - shopping, gambling, etc - and manufactured or mass produced entertainment are no longer favored by a growing number of travelers. Instead, they want to see the real thing and are savvy enough to easily tell the difference. In Guatemala, for example, tour operators used to pay people of Mayan descent to put on a 'cultural show' that might demonstrate a romanticized mock religious ceremony. Today, however, tour operators are seeking permission from real Mayan priests to allow clients to attend and observe authentic ceremonies³¹ when and where they normally occur. Similarly, tourism demand for interactions with captive animals has diminished sharply as tourists seek the authentic experience of witnessing wild animals in their natural habitat.

Going green: While the concept of “natural” habitat lends itself to “authentic” experiences, it is also tied to a parallel trend of growing consumer demand for products that are seen as “organic”, “sustainable”, “environmentally friendly”, “green”, “fair trade”, or any other of several buzz words that imply care for the environment. The release of the film *An Inconvenient Truth* in 2006, the academy award that it won, and the awarding of the Nobel Peace Prize to Al Gore and the Intergovernmental Panel on Climate Change in 2007, were consolidating moments to a growing chorus of voices calling for personal action to combat climate change. These messages and others have encouraged the public to consider the environmental impacts of their behavior, and “green” has become trendy again on a sweeping scale. It is penetrating the purchasing decisions of consumers at all levels – from the coffee they drink, the cars they drive to the vacations they take. This group is sometimes dubbed 'conscientious consumers' and their numbers have swollen into a major purchasing bloc that all businesses would be wise to consider. A non-profit research group called Lifestyles Of Health And Sustainability (“LOHAS”) found that in the United States, consumers who are focused on health and fitness, the environment, personal development, sustainable living and social justice number 41 million people, or 19% of U.S. adults. Interviews with responsible tourism outbound tour operators in North America and Europe indicate that a growing number of clients demand and expect the travel companies they use to implement responsible business practices. Tourism companies are developing corporate social responsibility (CSR) policies aimed at conserving the environment, supporting the local community, and providing equitable wages to employees. Of the tour operators surveyed in this report, 49 posted a CSR policy on their websites. The most common elements are outlined in Figure 4 (for more on conscientious consumers and responsible travel product segment responses, see Section 3)

Search for fulfillment: A final trend, the search for personal growth and fulfillment, is combining with the others listed here to drive demand for responsible tourism products. As Baby Boomers, Gen-Xers, and Millennials or Gen-Yers seek authentic, 'green' experiences as an escape from the stress of urban life, they also are increasingly searching for deeper meaning in their vacation experiences. When all of your physical needs and desire for creature comforts have been met and are anticipated before you even articulate them, as on a luxury holiday for example, there can be an impulse to make a positive contribution to the people and environment around you. This may be particularly strong when North Americans and Europeans travel to developing countries and see poverty they are not used to seeing at home, or threat to beautiful landscapes they came to visit. Some responsible tour operators are capitalizing on this impulse by offering a chance to give back, either through financial support for local projects, or through volunteer opportunities. 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.

Figure 4 : Commonly Included Elements in Responsible Tour Operator Policies.



Of the tour operators examined in our list, forty nine of the tour operators with English websites had responsible elements incorporated within their CSR, responsible policies, or mission statements. This figure shows the commonly mentioned policies and the percentage of tour operators that include them.

(Source: CREST, 2009)

Trends Running Counter to Responsible Tourism

Interestingly, some of the same trends driving growth in responsible travel are also parking opposite reactions. These include:

Escapism/fantasy: Tourism to fantasy destinations like Disneyland, Las Vegas, and Club Meds, for example, has reached all-time highs. The Walt Disney Company reports that revenue from parks and resorts worldwide was up 8% between March 2008 and March 2009, to U.S. \$11.5 billion. Tokyo Disneyland and its nearby sister park, DisneySEA estimate a record 26.5 million visitors in the fiscal year ending March 2009, with sales of a record U.S.\$4.2 billion, up almost 10%.³² And Disneyland Resort Paris announced its first profit in five years during 2008 with revenue of €715 million, and increased attendance to 15.3 million guests.³³

Las Vegas' combination of escapism through gambling and entertainment has helped it maintain very high occupancy rates, leading up to and even during the economic recession, with 90.4% occupancy in 2007³⁴, 86% in 2008³⁵, and 82.4% as of April 2009.³⁶

¹ Authentic experiences must be carefully managed to ensure they are not intrusive on local community and culture or wildlife.

Similarly cruise tourism, which markets an escape experience through onboard shows and entertainment, has been a tourism powerhouse. It has sustained 7% annual growth and is expecting another record number of passengers (13.5 million) for 2009, despite the economic slowdown.³⁷ The number of cruise passengers globally has more than doubled since 1990, and because of its vertical integration (acting as transport, hotel, casino, restaurant, tour outfitter, etc.) cruising has emerged as one of the most profitable sectors in the tourism marketplace.³⁸

Time constraints and traveler frustrations: Modern lives are busier than ever and North Americans in particular, who already receive fewer vacation days than Europeans, are not taking the breaks their employers allow for (see Figure 8, Vacation Days per Source Market below). Airline travel systems in North America and Europe have struggled to keep up with growing demand, and passenger frustration hit its highest levels in ten years in 2007, when more than 25% of flights were either delayed or cancelled altogether in the United States (the number hit 33% in June of that year) and 26% in Europe.³⁹ Weary leisure travelers therefore are seeking easy, hassle-free vacations that are relatively nearby or may avoid flying altogether. To account for airline trouble and other hassles, many are buying travel insurance - 84% of Canadians agree that buying travel insurance is worth the cost to have peace of mind on their vacation.⁴⁰ But all of this has worked against responsible travel to Latin America and Nepal as these product segments and destinations are perceived as complex to arrange and hard to get to. Much of the growth in demand for cruise tourism may be due to its appeal as easy and hassle free.

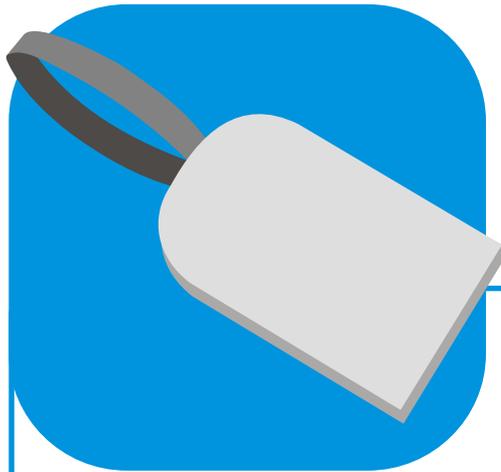
"Don't - fly" movement: Finally, while concern for the environment is leading some travelers to choose responsible tourism providers, deep concern over global warming is leading others to avoid air travel all together. A new "don't fly" movement has emerged (strongest in Europe but with some presence in the U.S.) in which passionate environmentalists choose to vacation close to home rather than fly to long-haul destinations like Latin America or Nepal. One English group has a website that recruits members of the public to sign a personal pledge to "be free from all air travel for a minimum of 12 months, except in an emergency" (Gold Pledge) or "avoid all leisure flights for a minimum of 12 months, although I may be expected to fly at times for business" (Silver Pledge).⁴¹ More extreme groups include Plane Stupid which claims to be "bringing the airline industry back down to earth" by opposing airport expansion and short-haul flights. They raise awareness through highly visible public protests at airports.⁴² The travel company NoFlyTravel.com seeks to capitalize on this movement, and may also be tapping into some people's fear of flying. Without specifying a source, they claim that "1 in 6 people would prefer to travel without flying - enjoying the thrill of the journey itself, whilst avoiding the hassle of modern airports."⁴³

These campaigns to limit unnecessary holiday and business flights have struck a chord with mainstream media. In a June 2008 column entitled "Please Don't Go" in the Los Angeles Times, Dan Neil argued, "Adventure tourism happens at the whip end of expense, pollution and environmental disruption." He encouraged readers to "travel conscientiously wherever - Paris, Bangkok, Banff - but when it comes to the most delicate and imperiled places, resist the urge to see them before they, or you, are gone."⁴⁴ In a 2006 online essay in The Guardian, Lucy Siegle wrote that "Richard Branson says he is searching for solutions [to global warming] by channeling £3 billion of Virgin Atlantic's profits into renewable energy projects - mainly biofuels. Will it help to turn back the tide of global warming? It's hard to see how. If he wants to save the world, he should ground his transatlantic fleet."⁴⁵ In 2009, Britain's Prince Charles was widely criticized for his decision to fly in a private jet during an environmental tour⁴⁶. Despite capturing headlines, there is no measure as yet of how influential the "Don't fly" movement has been in terms of discouraging leisure travel.

Table 4: Summary of Major Travel Trends and Industry Responses

Major Travel Trend	Travel Industry Responses
World economic downturn	Lower or flat prices, cutting costs, offering more short itineraries, adding another night or upgrades for free, locking-in prices to buffer against currency fluctuations, increasing range in budget, backpack and youth trips
Overall growth in tourism and long-haul travel	Industry has grown remarkably. Many more service providers to meet demand. Ever-more exotic destination development. Increased volume and revenues over last 10+ years, increased segmentation. E.g. the WTO predicts long-haul tourism arrivals from Europe in 2020 to reach a total number 164 million in 2020, a yearly increase of 6.1% starting from 2020 (with the largest growth expected to be to the Americas). ⁴⁷
Use of Internet and Web 2.0	Rapid growth of Internet travel sites, online bookings, and travel networking via blogs, video, chat rooms, Facebook, user-generated content, etc. Increased marketing budgets dedicated to Internet.
Generational shifts	Catering to Baby Boomers traveling as 'empty nesters', proliferation of 'soft adventure' luxury adventure offerings. Increased web presence to reach Gen X and Y. Offering intergenerational "family-friendly" holidays.
Increased urbanization	Proliferation of nature tourism that emphasizes getting back in touch with nature and spirituality of natural encounters. Adding nature tour opportunities to conventional holidays. Massive growth of adventure tourism set in natural landscapes. Increased interpretation and guide capacity.
Consumer desire for authentic experiences	Reduction of scripted encounters, increased free time in itineraries, growth of long-haul destinations, growth of educational and volunteer tourism, growth of cultural and community based tourism; increased opportunity for interaction with local people.
Going 'green' and searching for fulfillment	Improved environmental management practices. Increased investment in enviro-technology. Creation of environmental and social responsibility policies and posting policies on web. Growth of travelers' philanthropy and volunteer opportunities for customers. Increase in 'green' certification and responsible tourism networks, associations, and web portals.
Consumer desire for customization and tailoring	Increased complexity and flexibility of itineraries. Smaller group sizes.
Shortened time availability	Growth of short-break holidays and itineraries that try to pack in a lot in little time. Growth of adventure tourism that offers short, intense experiences. More internal or regional flights.
Traveler frustrations and desire for easy holidays	Increased efforts to make online bookings easy. Growth of travel insurance sales. Emphasis on customer service.

Source: CREST, 2009.



SECTION 2

**Profile of Responsible Tourism
Consumers and Source Markets**

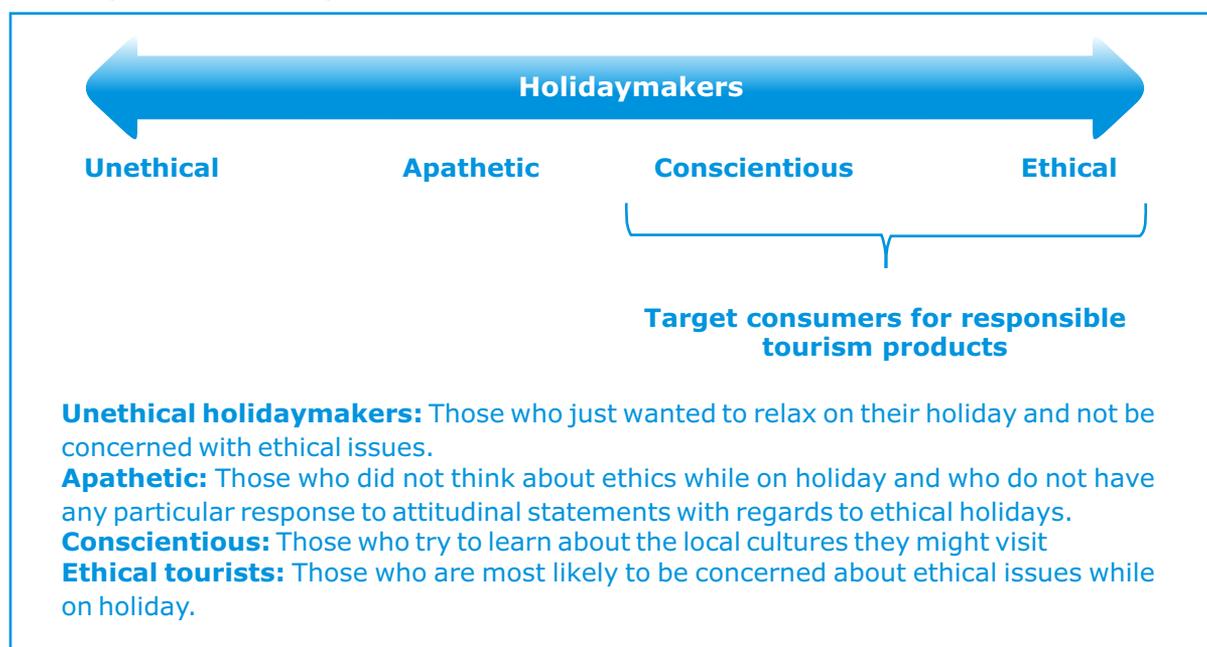
Profile of Responsible Tourism Consumers and Source Markets

This section attempts to provide some basic background on who are the consumers of responsible tourism products, the motivations behind their travel decisions, and a general consumer profile.

2.1 Who are the consumers of responsible tourism products?

There is obviously a range of consumer attitudes and demands for tourism products and it is important to understand where responsible consumers fall within the overall tourism market. A 2003 Mintel report on eco-and ethical tourism contained the following consumer typology⁴⁸ which appears transferable to tourism consumers regardless of national origin (Figure 5):

Figure 5 : Typology of European Holidaymakers as Defined by Mintel 2003.



Based on this breakdown, the main market of responsible tourism products are those consumers who fall in the conscientious and / or ethical holidaymakers segments. These two categories are part of the shift away from the traditional sun, sand and surf holidays and towards more experiential vacations.

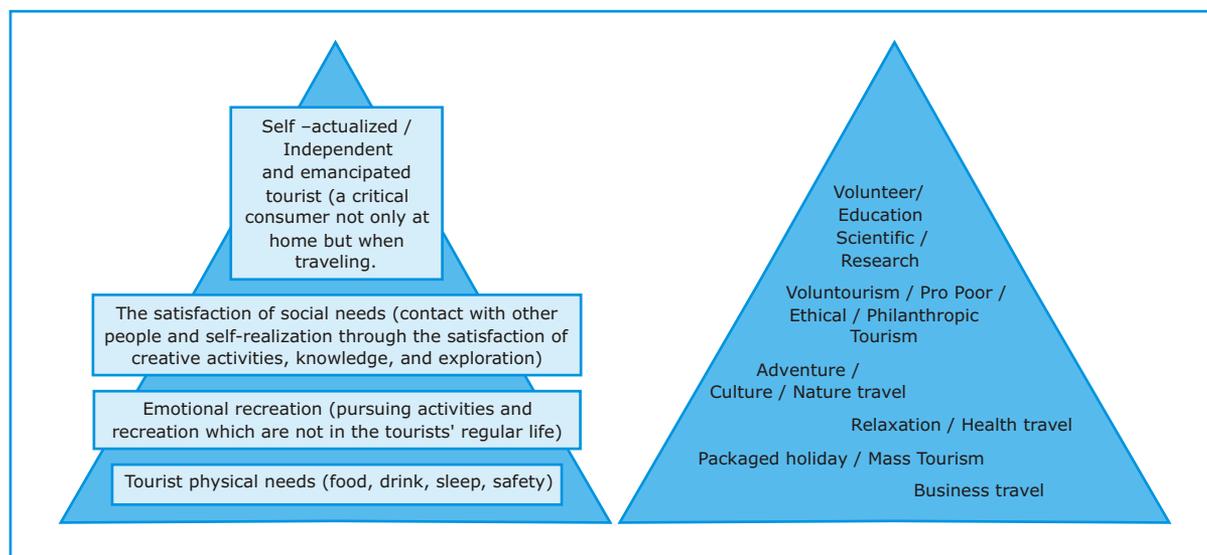
Understanding consumers and motivations in the responsible tourism market

According to this Mintel and other studies, Conscientious and Ethical Travelers, i.e., the potential consumers of responsible tourism products, are different in a range of ways from the Unethical and Apathetic Travelers. They are increasingly seeking experiences, fulfillment, and rejuvenation rather than places and things.⁴⁹ Personal satisfaction and experiences are becoming more important and consumers are more independent, involved, and discriminatory in the itinerary planning process.

Motivational theories have also been used to interpret tourist behavior. In 1987, Krippendorf placed Maslow's 'hierarchy of needs' in the context of responsible tourism, arguing that there are a growing number of tourists seeking emotional recreation, satisfaction of social needs, and self-realization and fulfillment through travel.⁵⁰ Not surprisingly, Krippendorf concluded that the decision to visit a particular destination or choose a specific type of tourism product was a complex amalgam of needs. He says this motivates tourists to set and prioritize goals in order to try to achieve these needs. Figure 6 outlines travel motivations based on Maslow's pyramid and offers a schematic of where certain tourism product segments might fit. Conscientious holidaymakers, i.e., those who are trying to satisfy a combination of emotional, recreational, and social needs, may be inclined to choose a holiday that offers opportunities to learn and explore such as nature-based, adventure, or cultural holidays. The Ethical holidaymakers are looking for travel experiences that allow them to give back to the destination through cultural exchange, service, stewardship or philanthropy. According to Brown's 2005 study on traveling with a purpose, consumers of responsible tourism products want a vacation that provides an opportunity to re-evaluate and discover more about themselves and to act in ways that modify or improve their behaviors.⁵¹

Based on a literature review and interviews with tour operators selling responsible tourism products, CREST has developed a consumer profile designed to help small ground operators in the destination countries better understand their potential consumers. Interestingly, the interviews with outbound operators in Europe and North America reveal that while there are little or no differences in their choice of destination countries (Nepal or in Latin America), the characteristics of responsible tourists vary according to the particular outbound country.

Figure 6 : Maslow's 'Hierarchy of Needs' Applied to Tourism.



The triangle on the right side outlines the potential tourism products that might correspond to the different motivations of the tourist. Responsible tourism products for the conscientious and ethical consumer lie in the upper tiers and the passive and uncritical consumer fall lower on the hierarchy.⁵²

2.2 Characteristics of the responsible traveler

There is little research on the “responsible traveler” to the focal destination countries in this report. Therefore the general characterization of responsible tourists is drawn from reports on the general travel behavior of consumers and interviews with tour operators in Europe and America. We will first discuss the qualities that are common among responsible travelers, followed by consumer behavior in the different source markets.

Our research has found several key attitudes resonate among all consumers of responsible travel products regardless of their country of origin. These consumers have a higher than average social conscienceness and therefore seek interactive holidays that provide an enriching experience distinct from their day-to-day lives. Ultimately, to attract the responsible traveler, travel products must appeal to these attitudes. “Figure 7” summarizes these core elements that are common among responsible travelers.

Interactive and Experiential

Responsible travelers tend to be experienced travelers, and, although they may have gone to a beach resort or on cruise holiday before, they are looking now for vacations that are “different and stimulating.” They are “interactive travelers” who participate in planning their travels, are curious about other cultures and environments, and want to connect with others, make friends, and develop personal relationships while on holiday. They are respectful of other cultures and demonstrate a willingness to adapt appropriate dress and behavior when traveling. They seek to learn about local traditions, politics, and religious beliefs,⁵³ as well as the environment, natural history, and wildlife. A market survey conducted by the Centre for the Promotion of Imports from Developing Countries (CBI) indicates that responsible tourists strive to use services that benefit the host communities, including accommodations (home stay, B&B, or small lodge), cultural demonstrations (cooking, weaving, craft making), cultural performances (music, dance, storytelling), transport (buses, trains, bicycles), and local nature, cultural and historic guides. The survey found that “these consumers will deliberately choose local options over those designed to appeal to a broader base of clients.”⁵⁴ As elaborated in Section 3, our study has found that these characteristics of the responsible traveler are found across a wide range of product segments.

Responsible tourists, being experience seekers, are more apt to shift away from external travel, in which the main interest is in demography and / or climate (e.g. beach holiday), towards internal determinants such as the desire for self-development and creativity.⁵⁵ Often these travelers seek to challenge themselves – physically, emotionally, and / or mentally - while on holiday. In their search for authentic personal experiences, they are drawn to destinations that are 'off-the-beaten path' and away from the standard tourist routes. The CBI study, for instance, found that the European “global experience seeker” longs for self-discovery and education while traveling, and that such experiences give a deep sense of personal fulfillment and individual growth.⁵⁶ A study conducted by the U.S. Travel Industry Association in conjunction with National Geographic concluded that “these travelers have expectations for unique and culturally authentic travel experiences that stem from a growing awareness of sustainability issues in travel.”⁵⁷ They also have cultural and environmental awareness and are more willing to participate in community-based activities.

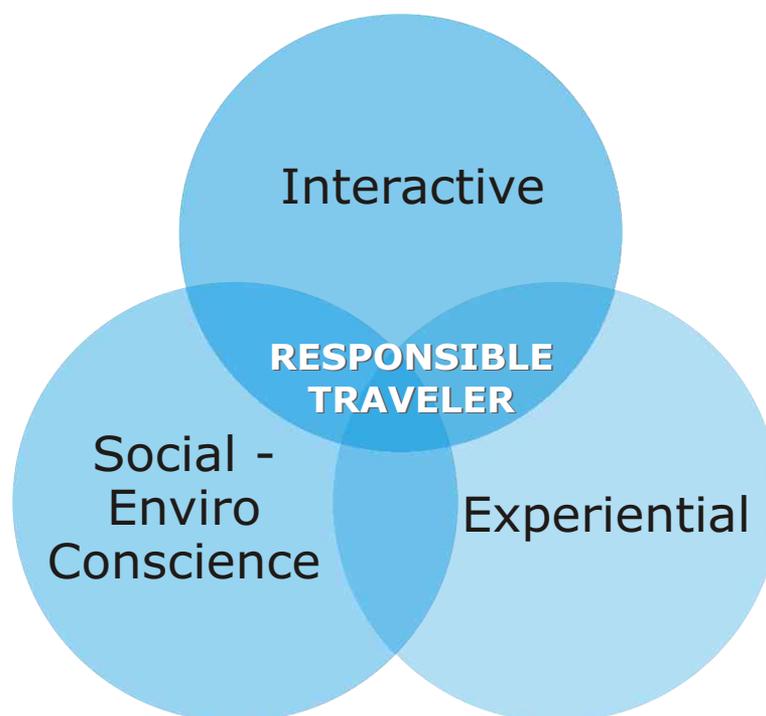
High Social and Environmental Consciousness

Based on recent consumer surveys and studies, as well as information gathered from interviews with tour operators, it is clear that responsible tourism consumers have an above average social and environmental conscience. These travelers are discerning consumers who are more likely to

choose a tour company with ethical characteristics such as a written CSR code, good working conditions, fair prices, locally sourced food and staff, and revenue sharing with employees, support for community projects and protection of the environment.⁵⁸ They also appear willing to pay (modestly) more for companies that are bringing real benefits to people in the host destinations.⁵⁹ Several tour operators interviewed noted that their customers have, as one put it, an “expectation that these trips are honorable and fair.” Although some tourists may not necessarily ask about the corporate social responsibility or ethical policy statement, many tour operators interviewed felt that having a policy gives them an edge in reaching more consumers. In a 2002 survey of the U.K. tourism market, Tearfund found 52% of respondents would be more likely to book a holiday with a company that had a written code to guarantee good working conditions, protect the environment, and support local charities.⁶⁰ Similarly, in a 2003 Mintel survey, U.K. respondents said they were able to enjoy their holiday more knowing that the company had good ethical practices.⁶¹

Consumers of responsible tourism products, particularly those interested in nature-based and adventure tourism may be willing to pay a premium to companies involved in protecting environmentally sensitive areas. For example, the 2003 TIA survey found that some 58.5 million U.S. travelers 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.⁶² Two separate studies in the Annapurna Conservation Area in Nepal⁶³ and in the Eduardo Avaroa Reserve in Bolivia⁶⁴ found that tourists from European, North American, and other developed countries were willing to pay higher entrance fees than currently charged because of their desire to protect the environment. Another study concluded that this willingness to pay more comes from the intrinsic, experiential and aesthetic value travelers place on nature.⁶⁵

Figure 7: Summary of the Key Elements of the Responsible Traveler



Interactive	Experiential	Social & Environmental Consciousness
Interact with and learn about natural, social and cultural environment	Authentic personal experiences	Minimal impact on destination
Meeting and interacting with locals	Desire for self discovery and growth (creativity	Supporting environmental conservation and minimizing negative impacts to local ecosystems
Participating in the lifestyles and experiencing it, rather than observing it	Challenging themselves – physically, emotionally and / or mentally	Conserving energy, water, and minimizing waste
Hands-on participation	Understanding and learning about different lifestyles and cultures	Giving back to the destinations they visit
Cultural exchange	Challenge self (physical, mental, emotional)	Supporting the local economy (eating local food, patronizing places that are owned by locals or that employ local peoples)
Develop relationships with other tourists and locals	Experiencing something different from their normal day-to-day life	Behave and dress appropriately
	Visiting authentic destinations that are not necessarily part of the tourist route	Less materialistic
	Exposure to unique and compelling experiences	Stay longer and spend more

Source: CREST, 2009.

Travel with a Purpose

Given the high social consciousness amongst responsible travelers, some want to go a step further and 'travel with a purpose'. This might take place in the form of travelers' philanthropy or volunteer tourism. Travelers' philanthropy is a growing movement among responsible travelers and tourism providers to give back to their host destinations.⁶⁶ Euromonitor reported in 2008, a growing trend among North Americans, who may be time-starved but cash-rich, to take luxury vacations that include some philanthropy along with relaxation.⁶⁷ Surveys and tour operators say that socially inclined travelers who see problems and projects first hand are often more willing to contribute. One Canadian tour operator who works with Fred Hollows, a foundation that provide cataract surgery to the elderly in developing countries, noted that in Nepal visitors often make generous donations or volunteer time after they have visited an eye clinic.

Volunteer tourism is growing rapidly among travelers who want active involvement in the destinations they are visiting. There are two main types: the first, which includes many long established programs, in which the volunteering is the primary activity and the other newer variant which is referred to as 'voluntourism', in which the vacation is primary but is mixed with short term volunteer opportunities. A 2005 study found that travelers seeking volunteer experiences have various motives: cultural immersion, a desire to give back, a deeper educational experience, and bonding and camaraderie that comes from working together for a common purpose.⁶⁸ In addition, young travelers, in particular, may view volunteer vacations as a

résumé builder, while older ones may seek volunteer holidays as a break from their careers or a way to explore career change opportunities. In some instances, experts such as doctors and dentists are able to claim tax deductions for their volunteer activities. See Section 3.5 further discussion of volunteer tourism.

2.2.1 Similarities across source markets

Consumers of responsible tourism products tend to be well-educated, of all age groups, evenly spread across both sexes, and have a higher than average (but not excessive) level of disposable income. There have been a number of studies that analyze the profiles ecotourists, geotourists, or long-haul responsible tourists. For example, a 2003 study of the “geotourism” market prepared by the Travel Industry Association (TIA) of America and National Geographic found that three market segments, representing 55.1 million U.S. residents, showed a particular inclination towards geotourism. The TIA study described these segments as: 1) the “geo savvys” who are young, well-educated, and environmentally aware travelers; 2) “urban sophisticates” who are the most affluent travelers, with strong preferences for the social and cultural aspects of travel; and 3) “good citizens” who are older and less sophisticated, but socially-conscious travelers.⁶⁹ In 2004, Tourism Queensland profiled ecotourists visiting Australia from key source markets, and in 2008 created “International Market Blueprints” by source markets.⁷⁰ CBI also developed consumer profiles of long-haul European travelers in its 2008 Market Survey.⁷¹ In addition, the UNWTO has reports on world and regional travel trends.⁷² Based on information gathered from these and other reports, as well as our interviews with tourism experts, we have delineated key similarities across all markets in terms of demographics, travel behavior, and psychographics. In addition, we found certain characteristics that are specific to each source market in North America and Europe. The following provides a summary of both the similarities across outbound markets, as well as the characteristics particular to individual countries.

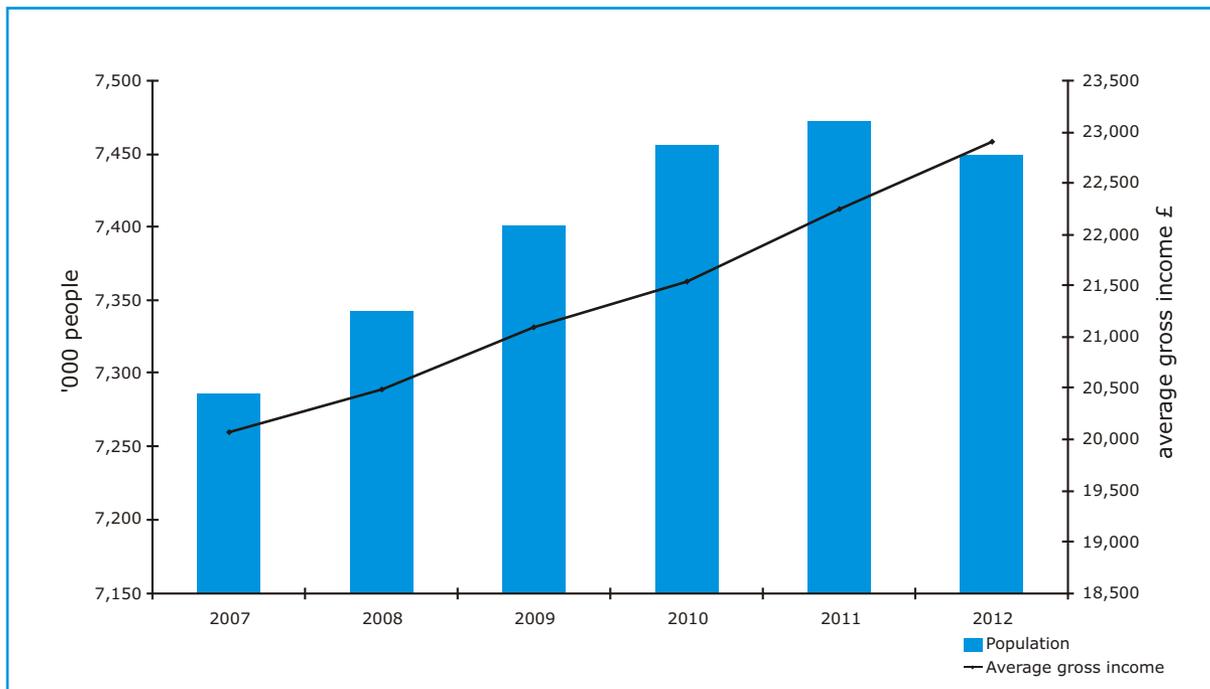
a) Demographics

Geographic Distribution: The geographic distribution of outbound travelers from North America and Europe appears to vary. For example, in North America the travelers tend to come from more urban areas or larger cities on the East and West coasts (New York, San Francisco, etc.), while in European countries international travelers come from many areas although they usually book through urban centers. The close proximity of countries within Europe also gives more opportunities for international travel, and this helps account for the higher frequency of overseas vacations amongst Europeans.

In both Europe and North America, two age groups – youth and retirees - hold strong positions within the responsible tourism market because they are able to take extended long-haul trips. These groups are not necessarily constrained by time and are often able to make trips longer than 14 days.

The youth group ranges between 16 to 35 years old. Higher rates of disposable income and trend towards later marriage give this group more freedom to travel. In addition, new social and professional networks that encourage exploration and development⁷³ and a growing number of youth are traveling pre- or post-university. Youth travelers are very socially conscious and major participants in volunteer vacations. When many young professionals do marry, they are often unwilling to give up their travel lifestyles and so will bring their children on holiday. More responsible tour operators are offering tours suitable for young families.

Figure 8 : Number and Average Gross Income of Generation Y in the U.K.



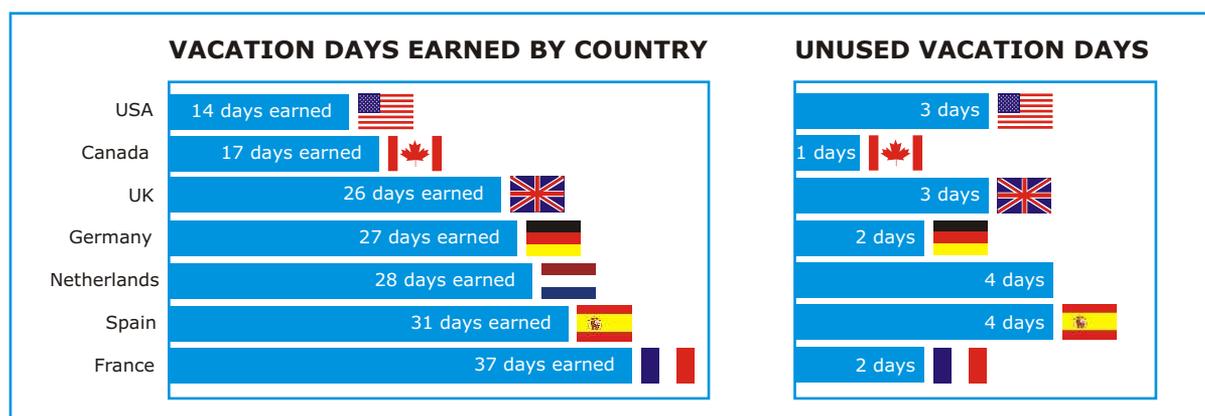
Generation Y from the source report were youth under the age of 25 (i.e. born after 1982).

Source: Euromonitor International. 'World Travel Market – Global Trends Report 2008.'

The second category, Baby Boomers, retirees and “empty nesters” (whose children no longer live at home), is also a major consumer of responsible tour packages to developing countries. These tourists (some as young as 45) are healthier, sometimes in early retirement with generous pensions or savings, and have fewer time constraints. The packages they choose often cost more but offer assurances of well-organized, safe, and hassle free trips. One tour operator noted that Baby Boomers “follow the waves of tourism: they traveled in their youth in the 60s and 70s, and they want to do it still [only] now in comfort.” The majority are more interested in cultural and soft, rather than extreme, adventure travels. Despite the current economic crisis, one tour operator noted that older people are not necessarily waiting for economic recovery or traveling less: “Someone in their forties or fifties might wait two years to travel, in their sixties, maybe wait a year; people who are seventy or eighty would just do it because they don't know how much time they have left.”

Vacation time: Travelers of working age often have less leisure time and are willing to spend money in order to save time while on holidays. Shorter leisure times means shorter but more frequent trips. U.S. workers, in particular, have less vacation time and thus look for opportunities and the convenience to simplify their travel bookings.⁷⁴ Figure 9 shows some of the results from Expedia.com's annual “Vacation Deprivation Survey which found that U.S. workers have the fewest vacation days compared to other source countries. However, time poverty often prompts people to save up time to spend later, for example, taking sabbatical holidays, or 'trips of a lifetime'.⁷⁵ Such trips often feature some form of personal challenge or self-development, similar to the product segments outlined in this report.

Figure 9 : Vacation Time by Source Market.



The left side shows the amount of vacations received based upon the mean of all employed adults from the source country. The right side shows the average amount of vacation days each employed person gives back (i.e. unused vacation days).

Source data from Expedia.com – 2008 International Vacation Deprivation™ Survey Results.⁷⁶ Adapted from www.vacationdeprivation.com.

b) Psychographics

Type of people: Responsible tourists tend to be well educated, informed on a range of subjects, selective in their media consumption, and often opinion leaders. They research their trips and use all types of booking options. According to a study by PhoCusWright and YPartnership, tech savvy travelers are a growing and lucrative travel market⁷⁷ who relies heavily on media and the Internet for arranging travel. Increasingly, travelers are looking to websites like TripAdvisor to read user generated reviews on places they plan to visit.

Where they travel: They travel beyond major cities. According to tour operators, these travelers are interested in exotic or “trophy” destinations (e.g. Galapagos, Mongolia, Mt. Everest) and 'off-the-beaten path' locations that have become famous (e.g. documented on nature programs, UNESCO sites). Once the responsible traveler has been there, he can say, “I've done that” - and move on to find another destination.

c) Travel behavior

The travel behavior of consumers can range from fully independent travel to partially independent to entirely pre-booked tour packages (e.g. all-inclusive, group travel, school groups, etc.). There is evidence that responsible travelers tend to be more independent. A 2002 UNWTO report found, via an in-flight survey, that two-thirds of American ecotourists were independent travelers who made their own travel arrangements rather than joined a packaged tour.⁷⁸

The tour operators interviewed noted that travelers who book through outbound tour companies, were, in general, fairly evenly split between solo travelers and those traveling with a partner. However, many tour operators are now providing options for independent and customized travel and are thereby trying to capture the solo travelers market.⁷⁹

Travel style: The traveler's age, budget, cultural background, and previous travel experience influences the travel style, including choice of tours and activities, style of accommodation, and mode of transport. As with other things in the travel industry, travel styles are constantly evolving and definitions vary from market to market.

When they travel: Both North Americans and Europeans travel during the summer school holiday months (June – mid-September) and around major holidays such as Easter and Christmas. Shorter winter holidays, during the months of December through February, are increasingly popular.

Travel booking: As noted earlier, travelers are increasingly booking online and directly with the destination. In addition, the economic crisis appears to be changing booking habits. In the past consumers booked holidays well in advance, but many of the tour operators interviewed for this study noted that people are now booking later. As one U.K.-based operator put it, this “could be a reflection in the hesitancy to spend money on travel in uncertain economic times.” A proliferation of 'last minute' websites is also resulting in shorter lead times for bookings, even for some long-haul markets.

Factors influencing the decision making process: The 2003 Mintel report for Eco and Ethical Tourism on the U.K. gives a breakdown of consumer preferences based on demographic, socioeconomic, regional variations, and type of media used (e.g. Table 5). It is therefore one of the more detailed studies of travel purchasing behavior of responsible tourists. Outlined in the box below are the top factors that those interviewed said make an enjoyable holiday. Although there is some variations based on age and income (e.g. younger groups find nightlife to be of higher importance), in general, a high standard of accommodation and guaranteed nice weather were the most important factors (Figure 10).⁸⁰

Figure 10: Important Factors for an Enjoyable Eco and Ethical Holiday in the U.K.

Important Factors for an Enjoyable Eco and Ethical Holiday in the U.K. in 2003	
1.	High standard of accommodation and facilities
2.	Nice weather guaranteed
3.	Interesting sightseeing (e.g. historical, cultural, wildlife)
4.	Feeling I'm experiencing a different culture
5.	A country or area not visited before
6.	Local cuisine
7.	Uncrowded beaches
8.	Well organised/good reps/interesting tours/trips
9.	Independent feeling, not being part of a crowd, getting off the beaten track
10.	Nightlife bars, live entertainment, dancing, clubbing
11.	Knowing that I have booked with a company that has a good ethical practice
12.	Knowing that my money benefits the local community

Adapted from Mintel, 2003. "Eco and Ethical Tourism – U.K. - October, 2003."

Table 5: Top Factors for a Good Eco and Ethical Holiday in the U.K. by Demographic Sub-Groups, 2003

	High standard of facilities/ accommodation	Nice weather guaranteed	Interesting sightseeing	Experiencing a different culture	Country or area not visited before	Local cuisine
	%	%	%	%	%	%
All	67	60	54	38	37	36
Men	63	60	53	38	38	36
Women	70	60	55	38	37	36
15-19	53	60	41	34	33	25
20-24	64	59	42	36	38	29
25-34	69	61	50	40	37	33
35-44	73	63	58	42	38	41
45-54	65	60	61	43	36	41
55-64	67	63	59	43	43	44
65+	66	53	53	26	35	29
Socioeconomic status						
AB	67	52	63	49	45	47
C1	68	59	53	39	39	38
C2	68	66	55	32	32	27
D	65	60	49	33	32	30
E	64	66	44	33	35	32

Source: Mintel (2003). *Eco and Ethical Tourism – U.K. – October 2003*, pp. 11-12. Note: Mintel's classification system - AB group are Thriving or Expanding (wealthy achievers or prosperous pensioners). C group is Rising (affluent urbanites, prosperous professionals in the cities, or better off executives; C2 is a lower socioeconomic group than C1). D groups is Settling (comfortable middle agers), and E group is Aspiring (new homeowners, white collar workers).

Travel from selected source markets to selected countries

From 2000 to 2006, the average percent change in travel from the six outbound North American and European countries to Nepal and the selected Latin American countries is outlined in Table 6. The UNWTO data of these travel changes shows that travel to Guatemala, Honduras, Nicaragua, Bolivia and Peru have seen steady growth in overall international arrivals. In addition, from the six source countries examined in this study, Nicaragua saw the strongest growth, particularly from the U.K. The growth in tourism in Nicaragua is encouraging and confirms, to some extent, what international tour operators have noted, that travelers are looking for the 'off-the-beaten track' locations, untouched, or the 'new Costa Rica'.

Table 6: Average Change in % of International Tourism Arrivals from Source Countries to Destination Countries: 2000 – 2006

		Destination countries						
		Nepal	Guatemala	Honduras	Nicaragua	Bolivia*	Ecuador	Peru
Source markets	All International Arrivals	(-2.3)	(14.2)	(9.8)	(8.6)	(5.7)	(-2.2)	(10.0)
	United States	(-11.4)	10.4	(7.2)	(12.3)	(-3.1)	(6.7)	(8.1)
	Canada	(-9.1)	(12.5)	(6.1)	(13.3)	(1.1)	(6.9)	(12.8)
	Germany	(-10.1)	(-1.6)	(4.1)	(11.8)	(-2.9)	(-0.2)	(5.8)
	The Netherlands	(-13.1)	(3.0)	(4.5)	(7.9)	(-9.1)	(-1.0)	(2.9)
	Spain	(2.3)	(3.9)	(5.8)	(3.2)	(4.5)	(18.5)	(16.6)
	United Kingdom	(-8.1)	(11.7)	(6.8)	(26.9)	(2.9)	(4.5)	(10.2)

Indicates positive change. Indicates negative change. More arrows represent greater change. Note that Honduras, Nicaragua and Peru inbound tourism has grown positively. There is decline in travel to Nepal. Spanish outbound tourism to developing countries has seen growth.

*Bolivia data is from 2000 – 2005.

Source: This chart was compiled by CREST, 2009, based on data from three UNWTO reports: 2007 Market Trends World Overview, Market Trends – Americas, and Market Trends – Asia.

Travel to Nepal has declined, and this may be related to the political instability in the region and the greater time and distance required in traveling there. The country is amongst the 50 Least Developed Countries in the Worlds according to the United Nations⁸¹ and the recent political troubles (including the change in Prime Minister in early May 2009) will likely continue to affect tourism arrivals. Arrivals in Bolivia appear to be steady. Being one of the least developed countries in Latin America could impact travel decisions to Bolivia, but given its proximity to Ecuador and Peru, there is potential opportunity for Bolivia tourism to grow significantly.

Canada, Spain, and U.K. outbound travel to the selected destinations appears to be growing. But in absolute numbers, North Americans still remain the largest group of travelers to most of the Latin American countries. The Spanish market in Latin America should be watched carefully, particularly in Ecuador and Peru. As usual, the U.K. remains strong in travel to developing countries. Germans however, are traveling less to Latin America. The Dutch appear to prefer travel to Central America more than to South America.

2.3 Source market profiles

Sections 3.3.1 to 3.3.6 provide details by source market. For consumer profiles by product segments see Section 4. While a general profile can be made by country, it is important to keep in mind that individual travelers vary and there are many factors that influence travel decisions, other than country of origin.

North America

2.3.1 United States

Generally, most travel by U.S. residents is within North America, with the U.S., Canada and Mexico being the most popular destinations. However, there has been steady growth in international outbound travel. In 2007, the U.S. set a record for the fourth consecutive year in outbound travel, with 64 million U.S. residents traveling abroad. The growth came entirely in travel to overseas regions, 31.2 million, up 4%, while travel to Mexico and Canada declined.⁸² Of this figure, 25.8 million were to overseas destinations for holidays or to visit friends and relatives (VFR) and 5.4 million were business related.⁸³

Outbound international travelers tend to be from urban areas of the U.S. The 2002 UNWTO report on ecotourism found that the average age of ecotourists was between 35-54 years old.⁸⁴ Because U.S. international travelers tend to be better educated than the general U.S. population, their average annual household income in 2003, was higher as well: U.S. \$62,720 for international travelers vs. \$57,047 for the general population.⁸⁵

Travel behavior

U.S. tourists, being time-starved, tend to prefer the convenience in travel arrangements offered by pre-packaged tours. However, a considerable proportion of responsible tourists prefer making independent travel arrangements. In fact, the popularity of customized trips is increasing while pre-packaged trips have declined since 2004.⁸⁶ The U.S. Department of Commerce reported in 2007 that only 5% (~1.2 million) of air trips for leisure are arranged through tour operators, while 34% of air travel is arranged through travel agents, and 35% is through the Internet.⁸⁷ U.S. travelers primarily use the Internet and guide books to help plan their holidays, with media, such as travel programs on television and National Geographic magazine, impacting travel decisions to exotic places.

U.S. consumers tend to plan their long-haul leisure trips about six to nine months prior to departure. Long-haul ecotourism trips tend to be longer (12 nights) compared to the average international air traveler (9 nights).⁸⁸ U.S. ecotourists prefer to stay in good quality

Annual leave:

14 days



Key booking period:

September – December;
March – April

Peak Travel Period:

December – February;
May – September

Outbound trips:

64 million international trips in 2007 (including Mexico and Canada). 31.2 million overseas trips

Major Market Centers:

New York, Los Angeles, Chicago, Miami, Washington (D.C.), Boston, Philadelphia, Dallas, Detroit, San Francisco

Source: US Department of Commerce, 2008

accommodations and relatively few book with budget accommodations. In 2007, the Natural Marketing Institute found that luxury ecotourism was the fastest growing market in the tourism industry in the U.S.⁸⁹

Travel to destination countries

For Nepal and the six Latin American countries covered in this report, U.S. travelers are the largest group in absolute numbers. They comprise the largest market share of international arrivals for Nicaragua, Honduras, Guatemala, and Ecuador (see Annex II for summary). For Guatemala, Honduras, and Nicaragua, U.S. international arrivals outnumber the other the next largest group of arrivals from the selected outbound markets by more than ten times; for Peru, they outnumber the next largest group by four times. U.S. travelers tend to favor travel to the six Latin American destinations over Nepal, undoubtedly because of the relatively short flight and less difference in time zone change. Table 7 outlines the U.S. outbound market data for the selected destination countries.

Table 7: U.S. Market Data in Selected Destination Countries

	Asia	Central America			South America		
	Nepal (2007)	Guatemala (2006)	Honduras (2006)	Nicaragua (2006)	Bolivia (2005)	Ecuador (2006)	Peru (2006)
Market Share of American Visitors (%)	5.7	22.5	32.9	21.8	9.1	24.4	18.2
Number of visitors (x 1000)	29.7	338	228	169	38.8	205	297
Rank (of market share for international tourist arrivals)	4	2	1	1	3	1	2

Note: Source data is from the UNWTO 2007 Market Trends World Overview and Market Trends – Americas reports for the Latin American countries. Statistics from Nepal are from the Government of Nepal's Ministry of Tourism and Civil Aviation.

Current economy and the impact on travel

The worsening economic conditions in the U.S. will continue to hamper the growth of leisure travel. Travel Pulse reports that The Traveler Sentiment Index by TIA and YPartnership found that U.S. consumers are concerned about the affordability to travel.⁹⁰ Given this, the association suggests that the search for value is “king”, and travelers are choosing lower-cost hotels and destinations, as well as shortening their trips to save money. But, despite lagging consumer confidence and the economic recession, the Index concludes that leisure travel will be more resilient than business travel which is projected to fall even further.

However, the top 10% most affluent Americans are not cutting back on travel spending even in with the poor economy. According to the most recent Annual Survey of Affluence and Wealth in America by American Express Publishing and Harrison Group, affluent Americans are spending less on personal items (such as jewelry and fashion), but are spending more for the family, including travel. The American Express study also noted that 20% of U.S. families are reducing gift giving so that they can donate to charities instead.⁹¹

2.3.2 Canada

Similar to U.S. residents, Canadians most frequently travel within North America to their closest neighbor, the United States. Statistics Canada indicates that in 2005 Canadians made 21.1 million trips outside the country, including 6.1 million overseas (i.e. non-U.S.). With an improving currency over the last few years, an ageing population eager to travel, and approximately 41% of all Canadians owning passports (compared to 21% of U.S. citizens),⁹² Canadians are not only frequent travelers but spending on vacations continues to grow. In 2006, they spent U.S. \$9.4 billion on overseas travel and overseas travel increased by more than half a million trips. More than half of these trips were to Europe.⁹³

Today, more Canadians are using their annual leave for travel than in the past. According to the Travel Activities and Motivation Survey, 74% of all adult Canadians-about 18 million people-traveled for vacation or pleasure sometime from 2004 to 2006. This compares with 73% of adults from 1997 to 1999.⁹⁴ Canadians are also vacationing more overseas: 28% of the population in 2006 compared to 20% in 1999.

Independent Canadian travelers are more likely to be younger, mainly between 25 and 54 years old, while group travelers tend to be older, 45 to 74.⁹⁵ Seniors comprise the most important segment for international travel, both the independent and group tour markets. However, younger Canadians and those with above average income took more overnight vacations than older adults and people in lower-income households.⁹⁶ Canada has also been growing in numbers of commercial niche nature / eco- tour operators.⁹⁷ For tour operators, the average vacation length tends to be 2 weeks, whereas independent travelers prefer trips from 8 days to over 2 weeks.⁹⁸

Travel behavior

Canadians, like their U.S. neighbors, are vacation deprived. Canoe.ca reported that in an Expedia.ca / Ipsos Reid survey, respondents were asked what they daydream about. The top response - 75% - was travel, followed by money (73%), more free time (42%), and sex (40%).⁹⁹ Similarly, a 2008 poll conducted by SavvyTraveller.ca revealed that 75% of Canadians said that if they had the money they would travel more frequently.¹⁰⁰

The key travel period is centered around student holidays such as March break, Christmas and New Years break, and the summer (July - August). Canadians are impulse shoppers when it comes to travel, with their motivations driven by factors such as local weather (particularly in the winter time), work stress, and travel deals (e.g. last minute deals).¹⁰¹

For Canadians, the destination is very important with safety being the top consideration.¹⁰² Many Canadian ecotourists are interested in international destinations, and are attracted to virtually all continents and regions. Planning time for holidays tend to be relatively short for Canadians, generally less than three months, but they will do considerable research before their trip. Word of

Annual leave:

2-3 weeks



Peak Travel Period:

Key travel time: November - April (ie. When the weather is cold).

Family travel time: June - September; December - February.

Outbound trips:

6.74 million international trips (not including the United States) in 2006

Major Market Centers:

Toronto, Montreal, Vancouver, Ottawa, Calgary

Source: Media-Corps, 2009

mouth, Internet and guidebooks are the most important resources. Canadians tend to be bargain hunters and will look for last minute travel deals.¹⁰³ Meta-search capabilities and websites that offer traveler generated reviews are very popular among Canadians.

Canadians tend to have a high environmental conscience and live a lifestyle that reflects this concern. The UNWTO Canadian Ecotourism Market Study found that Canadian ecotourists and tour operators are conscious of the destination, including its conservation and community development opportunities.¹⁰⁴ Canadians are also willing to pay a little bit more for a vacation that benefitted the environment. Being a northern country where the effects of climate change are particularly acute, Canadians are highly concerned with global warming. The Canadian Tourism Research Institute found that 74% of the Canadians polled would be willing to pay \$10 or more for every \$1000 of their paid airfare to offset the environmental impact of their travel. This has led to an increase in the number of organizations offering carbon offsets, but in contrast to Germany and the U.K., travel companies still have yet to actively engage travelers with offsetting options.¹⁰⁵

Travel to destination countries

Canadians comprise a larger part of the international arrivals to Central America than do European countries. However, travel to South America and Nepal is relatively lower among Canadians. Central America (and the Caribbean) is popular packaged holiday destinations for Canadians wishing to escape the winters, with a significant number of Canadians booking all-inclusive holidays to Mexico and the Caribbean. Having experience in popular holiday destinations in Latin America could entice Canadians to book other trips in Latin America (either all-inclusive or independently). Table 8 outlines the Canadian outbound market data for the selected destination countries.

Table 8: Canadian Market Data in Selected Destination Countries

	Asia	Central America			South America		
	Nepal (2007)	Guatemala (2006)	Honduras (2006)	Nicaragua (2006)	Bolivia (2005)	Ecuador (2006)	Peru (2006)
Market Share of Canadian Visitors (%)	1.4	2.1	1.7	2.9	2.0	2.0	2.4
Number of visitors (x 1000)	7.4	32.3	12.4	22.2	8.3	17.1	40.0
Rank (of market share for international tourist arrivals)	12	7	8	6	15	8	12

Note: Source data is from the UNWTO 2007 Market Trends World Overview and Market Trends – Americas reports for the Latin American countries. Statistics from Nepal are from the Government of Nepal's Ministry of Tourism and Civil Aviation.

Current economy and the impact on travel

Canadian households are coping with the higher costs of fuels, consumer goods, and services, leaving less money for discretionary items.¹⁰⁶ Travel is perceived as self-indulgence and Canadians need to cut back on spending elsewhere in order to travel. The strong Canadian dollar

prompted increased outbound travel, but the economic recession has reversed this trend. According to the Canadian Conference Board's Travel Intentions Survey, Canadian intentions to take a winter holiday fell from 47.5% in October 2007 to 39.1% in October 2008.¹⁰⁷ The changing value of the Canadian dollar and the uncertainty in the global economy has left Canadians feeling very unsure about their financial situation, thereby impacting decisions to travel overseas.¹⁰⁸ A popular Canadian travel company (Conquest Vacations) specializing in all-inclusive vacations recently collapsed due to financial difficulties in the recession.¹⁰⁹

Europe

2.3.3 Germany

Germans love to travel. Germany has the world's largest outbound travel market. In 2005, Germans made more than 70 million outbound trips with expenditures reaching 61.5 billion Euros (approx. U.S. \$78.8 billion). Of these trips, 11 million were to developing countries, accounting for 14% of all foreign trips.¹¹⁰ The number of trips to long haul destinations and developing countries has been increasing over the years.

Younger singles or couples with no children are more likely to take a trip abroad than older couples, although travel with one child is beginning to grow in importance. The largest group of German ecotourists is typically between age 30 and 59, but mostly between 40 and 49 years old.¹¹¹ Also, with an aging population, there are an increasing number of tour operators catering to older German citizens.

Travel behavior

Because annual leave is five to six weeks, Germans have the option to take longer holidays compared to North Americans. The UNWTO predicts that Germans will take slightly shorter but more frequent holidays in the future. Travel is high during the German school holiday period, though strong throughout the year, especially among retirees.

Germans are price sensitive and will comparison shop for travel products. They are highly experienced travelers and are able to distinguish reasonable and unreasonable offerings. In order to save by planning early, Germans research and book their trips farther in advance than other Europeans. They frequently plan their vacations five months ahead of departure. They are confident and sophisticated travelers who seek more personalized vacations. Given their experience, they are increasingly looking for more stimulating, experiential travel beyond simple relaxation and visiting friends and relatives.¹¹²

Annual leave:

5 – 6 weeks



Key booking period:

February – March;
October – November

Peak Travel Period:

November - March

Outbound trips:

76 million (2007)

Average number of foreign trips per capita:

0.94

Trips to developing countries:

11 million (2005)

Major Market Centers:

Berlin, Hamburg, Munich, Cologne,
Frankfurt, Bonn and Düsseldorf

Source: CBI, 2008

Although Germans have a good command of English while on their travels, they prefer marketing materials written in German. They rely heavily on travel agents and tour companies though over half of all Germans plan their vacations independently. Recommendations from friends and travel agencies play an important role in German travel planning.

Some Germans are sensitive to the social and environmental concerns of travel. However, they feel that it is up to the supplier to offer environmentally friendly solutions and responsible products, and will delegate this task to the travel company to assume full responsibility. Germans are very concerned with the effects of climate change, and are more likely than other Europeans to purchase carbon offsets. Responsible German travelers also prefer accommodations run by locals with expectations of local food and cuisine.¹¹³

Travel to destination countries

The Germans, being avid travelers and the largest outbound market in the world, spread their tourism dollars throughout the world. Although significant, the number of German travelers to the selected destinations remains low compared to the U.S. and U.K. There appears to be slight decline in travel to some of the Latin American destination countries (Guatemala, Bolivia and Ecuador) and Nepal from 2000 – 2006 (see Table 6). However, there has been significant growth in the number of Germans traveling to Nicaragua. Table 9 outlines the German outbound market data for the selected destination countries.

Table 9: German Market Data in Selected Destination Countries

	Asia	Central America			South America		
	Nepal (2007)	Guatemala (2006)	Honduras (2006)	Nicaragua (2006)	Bolivia (2005)	Ecuador (2006)	Peru (2006)
Market Share of German Visitors (%)	4.0	1.2	1.1	1.4	4.9	2.2	2.6
Number of visitors (x 1000)	21.3	18.2	8	10.9	20.3	18.6	42.7
Rank (of market share for international tourist arrivals)	6	12	12	10	7	6	11

Note: Source data is from the UNWTO 2007 Market Trends World Overview, and Market Trends – Americas reports for the Latin American countries. Statistics from Nepal are from the Government of Nepal's Ministry of Tourism and Civil Aviation.

Current economy and the impact on travel

Despite a weakening economy, Germans retain their desire to travel and continue to plan holidays. Economic instability did not slow down German travelers in 2008, but for 2009, the growing recession has resulted in uncertainty. The global economic downturn has led Lufthansa to scale back their capacity expansion plans. Similarly, TUI, Germany's largest travel company, is being cautious and conservative in its capacity planning for 2009.¹¹⁴

2.3.4 The Netherlands

The Dutch are characterized as highly educated, experienced travelers, with exceptional linguistic skills. They love to explore, learn, and interact with local communities during their travels. The average age of Dutch travelers is between 35-54, with most being from middle (26%) to upper income (65%) households. In general, long haul Dutch travelers fall under the following categories; singles or young couples without children, students, college educated, middle to upper income groups, and a growing number of senior travelers.¹¹⁵

According to the European Travel Commission's 2007 Report on tourism, the Dutch market is "characterized by a high propensity to travel abroad (81%)."¹¹⁶ The number of outbound trips from the Netherlands increased from 2006 to 2007 by about 4%, to a total 22.4 million trips. By 2015, it is expected that the Dutch will take on average three holidays per year.¹¹⁷

Dutch travel to developing countries increased by 39% between 2002 and 2005 to more than 3.2 million trips. Developing countries attracting more than one percent of Dutch travelers from 2002-2005 were the Dominican Republic, Egypt and India. Additionally, Dutch travel to various developing country regions grew during this same period: South Asia (68%), Middle East (66%), Americas (59%), Europe (48%), East Asia (16%) and Africa (10%).¹¹⁸

Travel behavior

The Dutch love sun and beach holidays, therefore long holiday packages to destinations in the South East Mediterranean, Americas, Asia Pacific, and Eastern Europe are popular.¹¹⁹ Other growing holiday segments are recreational nature, wellness, cruises, urban excursions, and active holidays (i.e. hiking/walking). Unlike other outbound markets motivated by popular trends and destinations, the dominant factor for the Dutch is price. They tend to look for good quality and high value for cost. The destination may come second to selecting the best value holiday package.

The Dutch have one of the highest Internet usage rates (73%) in the world, with approximately 60% of Dutch travelers planning and 33% booking holidays online.¹²⁰ However, they continue to prefer to use a travel agent or tour operator for extended or customized trips.

Dutch travelers interested in responsible tourism products and destinations continue to grow with the rise in environmental awareness. Currently, a few key Dutch tour operators incorporate sustainable and responsible travel. This includes: Baobap which specializes in sustainable tourism; Toppa Tours, the first operator to provide Fair Trade Holidays; and Vakantiekaart, first Dutch company to provide 100% carbon-offset to their clients free of charge.¹²¹ ECEAT Projects is

Annual leave:

4 weeks



Key booking period:

April – August / September

Peak Travel Period:

November – March;
December, July, and October strong travel periods

Outbound trips:

22.4 million (2007)

Average number of foreign trips per capita:

1.62

Trips to developing countries:

3.2 million (2005)

Major Market Centers:

Amsterdam, Rotterdam, The Hague

Source: CBI, 2008

a Dutch non-profit that has been promoting uptake of sustainability standards through supply chain management. Their Travelife project encourages good practices, and can be accessed at www.travelife.eu. They also have a B2B site at www.greentravelmarket.info that operates as “a virtual marketing service for sustainable tourism.”

Travel to destination countries

In terms of absolute numbers of international arrivals to the selected destination countries, the Netherlands comprises a small portion. Travel to Central America appears to be on the rise while travel Nepal and South America (particularly Bolivia) is not growing as much. Table 10 outlines the Dutch outbound market data for the selected destination countries.

Table 10: Dutch Market Data in Selected Destination Countries

	Asia	Central America			South America		
	Nepal (2007)	Guatemala (2006)	Honduras (2006)	Nicaragua (2006)	Bolivia (2005)	Ecuador (2006)	Peru (2006)
Market Share of Dutch Visitors (%)	2.0	0.9	0.6	0.7	2.1	0.9	1.1
Number of visitors (x 1000)	10.6	13.6	4.4	5.1	8.6	7.9	17.7
Rank (of market share for international tourist arrivals)	11	15	15	12	11	15	18

Note: Source data is from the UNWTO 2007 Market Trends World Overview, and Market Trends – Americas reports for the Latin American countries. Statistics from Nepal are from the Government of Nepal's Ministry of Tourism and Civil Aviation.

Current economy and the impact on travel

Prior to the global financial crisis, the Dutch outbound market was expected to continue to increase due to the country's strong economy and low national debt and unemployment rate.¹²² However, as Prime Minister Jan Peter Balkenende warned in February 2009, “The Dutch economy has deteriorated at an unprecedented rate since December 2008.” It is estimated that the Dutch economy will shrink by 3.5% in 2009 and unemployment will rise from 4% in 2008, to 6% in 2009 and 9% in 2010.¹²³ Therefore, the economic conditions indicate that the Netherlands – like many other developed countries - will take a few years to rebound and to stabilize its outbound travel market.

2.3.5 Spain

Although Spain has been the second most popular inbound destination in the world for some time, the Spanish have not been as interested in traveling abroad as their European counterparts.¹²⁴ However, in recent years there has been a dramatic increase in foreign travel. For example from 2002 to 2005, Spanish international travel grew 6% (to more than 17.8 million outbound trips), with a dramatic increase of 74% to developing countries.¹²⁵ The availability of low-cost airlines is significantly driving the trend for more short breaks and the increase in second or third long haul holidays per year. On average Spanish travelers spent U.S. \$1,400 per person on outbound trips in 2005.¹²⁶

In 2005, Spanish travelers took more than 2.4 million trips (or 14% of all trips) to developing countries. Among the most popular destinations were Morocco because of its close proximity and the high number of Moroccan immigrants in Spain, and the Dominican Republic and Cuba, both Spanish-speaking destinations. The countries that attracted more than 1% of Spanish tourists in 2005 were Venezuela, Croatia and China. However, between 2002 and 2005, Spanish outbound tourism increased across all regions: Africa (73%), Americas (66%), East Asia (63%), Europe (133%), Middle East (78%) and South Asia (85%).¹²⁷

A large proportion of the Spanish outbound market is between 25 and 34, with the overall outbound traveler averaging 37.5 years. The Spanish women travel more than men, with a vast amount of trips taken by singles.¹²⁸ An addition, senior travelers who are enjoying good health is a growing market segment.

Travel behavior

The Spanish enjoy social activities such as visiting markets, pubs, shopping, hearing live music, dining, and dancing. Popular holiday activities include visiting cities, touring, cultural sites, wellness, and sun and beach. In 2006, 28% of Spanish travelers booked a cultural holiday and 25% a party-holiday. Additionally, the cruise industry is increasing dramatically in Spain, with the country ranking 7th in the number of cruise passengers worldwide.¹²⁹

In general, Spanish travelers can be very demanding and complain if travel experiences do not meet expectations. Although the number of Spanish people who speak English is increasing, it is still necessary to provide tourist information in Spanish to attract the outbound market. Promotions and packages are typically published later in Spain because Spanish travelers tend to be late planners, typically booking only a month before departure. In addition, Spanish travelers tend to spend a lot when traveling abroad.

Annual leave:

22 days



Peak Travel Period:

Christmas, Easter, 3 weeks in the summer (August)

Outbound trips:

17.8 million (2005)

Average number of foreign trips per capita:

0.46

Trips to developing countries:

2.5 million (2005)

Major Market Centers:

Barcelona, Madrid, Valencia, Seville, Bilbao

Source: UNWTO, 2008

In terms of Internet usage, Spain ranks much lower than other European countries, but the rate is steadily increasing. In 2007, an estimated 45% of Spaniards used the Internet and 42% of these web users booked travel arrangements, including holiday packages and accommodations online. Popular websites for Spanish travelers include eDreams, Iberia, Opodo, Lastminute.com, Renfe, Rumbo, Terminal A and Viajar.¹³⁰

Travel to destination countries

Spanish travel to the selected destination countries is growing, with the most significant increases to Ecuador and Peru. Not surprisingly, Latin American countries in general are popular destinations. Table 11 outlines the Spanish outbound market data for the selected destination countries.

Table 11: Spanish Market Data in Selected Destination Countries

	Asia	Central America			South America		
	Nepal (2007)	Guatemala (2006)	Honduras (2006)	Nicaragua (2006)	Bolivia (2005)	Ecuador (2006)	Peru (2006)
Market Share of Spanish Visitors (%)	3.0	1.5	1.3	1.3	2.9	4.3	3.8
Number of visitors (x 1000)	15.7	22.8	9.8	9.9	12	36.5	62.3
Rank (of market share for international tourist arrivals)	8	9	9	11	9	4	6

Note: Source data is from the UNWTO 2007 Market Trends World Overview, and Market Trends – Americas reports for the Latin American countries. Statistics from Nepal are from the Government of Nepal's Ministry of Tourism and Civil Aviation.

Current economy and the impact on travel

Spain is now suffering from the severe financial crisis and experiencing the country's first recession in fifteen years. Currently, Spain has the second largest deficit in the world (€8.54 billion or equivalent U.S. \$10.97 billion), surpassed only by the United States. By early 2009, unemployment stood at 14%, the highest in the European Union and three times than the U.S. The tourism sector is projected to lose 100,000 jobs in 2009.¹³¹ With such high unemployment, the outbound travel market is suffering. Spanish consumer confidence is very low and the travel industry is reporting a significant decline in advance bookings. However, Spanish tour operators and travel agencies have noted that niche segments such as honeymooners and independent travelers are still planning holidays in advance.¹³²

2.3.6 United Kingdom

The British are savvy, experienced, and avid travelers. As an island nation, they have long explored overseas, and such travel has been growing: they made 66.5 million outbound trips in 2005 and 69.5 million in 2006. According to CBI, 9 million or 16% of these trips in 2005 were to developing countries. This makes the U.K. the second largest EU country in visits to developing countries, behind Germany, but ahead of France, Italy, and the Netherlands.¹³³

British regard holidays as a necessity rather than a luxury, and they typically take several trips per year. The traveling population is becoming older, with 38% over 55 years of age.¹³⁴ Not surprisingly, they come from all parts of the U.K. and frequently use air travel. Youth are also encouraged to travel either pre or post university and therefore are a large segment of British travelers. Singles are also a growing segment, with more tour operators catering to them. High-end travel has been growing quickly in the U.K.

Travel Behavior

Price is an important consideration for British travelers, but once on the road, they are also amongst the highest spending group of travelers. They do, however, want good quality accommodations and value for money. Holidays beyond Europe tend to be longer (8-21 days), compared with European holidays (3-14 days). Packaged travel to developing countries is increasing,¹³⁵ perhaps because people are less confident booking long-haul travel independently. But, as many British travelers prefer to feel independent while traveling,¹³⁶ many tour operators say they limit the size of tour groups.¹³⁷

Responsible and ethical travel is important to the British traveler. Their environmental consciousness is high and in response, there are a large number of responsible tour operators in the U.K. Many travelers are aware of CSR and prefer to book with tour companies that have ethical standards.¹³⁸ British travelers are concerned about global warming and are aware of their carbon footprint resulting from long-haul travel. Some travelers will offset their carbon, and a small number are boycotting long-haul travel, opting for vacations closer to home that don't involve flying.

In terms of travel decisions, word of mouth referrals from friends and families are important. In addition, television programs also inspire the British to travel to exotic destinations.¹³⁹

Annual leave:

20-25 days



Key booking period:

January – February;
September – October

Peak Travel Period:

Easter, Christmas, July – Early
September

Number of foreign trips:

69.5 million outbound trips, 0.96
foreign trips per capita in 2005

Trips to developing countries:

9 million trips in 2005

Major Market Centers:

London, Leeds, Manchester, Liverpool,
Birmingham

Source: CBI, 2008

Tourism to destination countries

Latin America remains a popular destination for the U.K. The most significant growth has been to Nicaragua, increasing over 25% each year between 2000 – 2006. In addition, Guatemala and Peru have seen significant growth. The U.K is the most important Western market source for Nepal, ranking fourth behind Indian, Sri Lanka, and Japan. However, travel to Nepal has dropped over 8% per year from 2005 – 2006. Table 12 summarizes the U.K. outbound market data for the selected destination countries.

Table 12: U.K. Market Data in Selected Destination Countries

	Asia	Central America			South America		
	Nepal (2007)	Guatemala (2006)	Honduras (2006)	Nicaragua (2006)	Bolivia (2005)	Ecuador (2006)	Peru (2006)
Market Share of British Visitors (%)	6.1	1.4	1.1	1.9	4.9	2.6	3.7
Number of visitors (x 1000)	32.4	21.2	8.0	14.5	20.3	22.0	59.9
Rank (of market share for international tourist arrivals)	3	10	11	8	6	5	7

Note: Source data is from the UNWTO 2007 Market Trends World Overview, and Market Trends – Americas reports for the Latin American countries. Statistics from Nepal are from the Government of Nepal's Ministry of Tourism and Civil Aviation.

Current economy and the impact on travel

Since 2008, the economic recession has made U.K. travelers more cost conscious. The Association of British Travel Agents reported that there was less demand during the 2008 summer for eurozone destinations because the euro made this area more expensive. Instead more families opted for domestic travel and more affordable holidays, including all-inclusive packages, camping, and caravanning.¹⁴⁰ Those choosing mid- to long-haul destinations are looking for more exotic destinations such as Peru, the Galapagos, and Egypt that have good exchange rates and therefore are cheaper to travel in, according to Opodo.co.uk, a British online travel agency.¹⁴¹ A recent survey by YouGov and TUI also found that British travelers continue to do cultural travel and are projected to take 13.4 million cultural / sightseeing trips over the next three years. Small group travel and niche markets such as ethical holidays, safaris, and eco-friendly holidays are poised for rapid growth over the medium term.¹⁴²

Following the collapse in September 2008 of XL Leisure Group, the third largest tour operator in the U.K., the negative impacts of the economic downturn may have been offset slightly as other tour operators benefited from the reduced competition. Two larger tour operators, Thomas Cook and TUI, report that they had fewer last-minute, discounted trips to sell. However, the collapse of XL also reduced consumer confidence, leading TUI to launch an advertising campaign to reassure British travelers that their bookings with TUI are secure.¹⁴³



SECTION 3

Product Segmentation

Product Segmentation

3.1 Rationale for product segments

This report examines six product segments that attract the vast majority of conscientious and ethical tourism consumers. They are:

1. Nature-based tourism
2. Cultural Tourism and Community-based Tourism
3. Volunteer and Educational Tourism
4. Backpacker and Youth Tourism
5. Adventure Tourism
6. High-end Tourism

The research team selected these product segments for analysis because consumers most interested in responsible tourism are likely to choose holidays that fall into one or a combination of these categories. Furthermore, these product segments often involve direct contact with sensitive ecosystems and local cultures where there is the greatest need, opportunity, and consumer demand for responsible tourism principles and operating practices.

Due to the wide variety of experiences available to leisure travelers today, the product segmentation we have chosen is admittedly imprecise, as number of tourism activities can be reasonably classified in more than one segment. In addition, most outbound tour operators that attract conscientious and ethical consumers sell a variety of holidays across various product segments. Other retailers simply sell according to destination with little regard to activity type.

The six product segments discussed here reflect broad usage patterns among outbound tour operators, and are consistent with terminology used across multiple peer-reviewed journal articles. There are also important differences in consumer characteristics from one product segment to another, so distinguishing between product types can help identify how to effectively market to specific consumer groups. Our hope is that this segmentation will help in-country service providers understand the ways their products fit into the broader marketplace and will help them identify optimal marketing approaches.

Finally, the six product segments in section 4 describe what the tourist does (Adventure Tourism, Cultural and Community-based, Volunteer and Educational), where the tourism takes place (Nature-based tourism), or the cost (Backpackers, High-end). As explained in Section 2.1, these terms are neutral with regard to the impacts and ethical values of the tourism. In contrast, responsible tourism is grounded in a set of social and environmental principles and practices that can be applied to any of these product segments. This study is focused on the responsible tourism subsets within each of these six product segments. For instance, Backpackers/Youth and High-end tourism both attract diverse groups of travelers – not all of whom appreciate the importance of minimizing their footprint or making positive contributions to communities. And backpackers may choose a responsible option (like taking local transportation) for its low price rather than an informed desire to help grow the local economy. In light of this, we gathered marketing and consumer profile information from companies that are explicitly targeting conscientious or ethical consumers within each segment. Our focus is on the responsible elements in each of the product segments below.

3.2 Similarities across product segments

All the product segments that attract conscientious and ethical travelers share a number of common characteristics as well as considerable variations. This section outlines some important points that can be applied to all the product segments.

3.2.1 Positioning, marketing, promotion strategies

This heading refers to the message that tourism marketers are sending to potential consumers about their product and the monetary value they assign to the product.

All of the product segments that attract conscientious and ethical travelers are responding to major trends in source markets (see Section 2.2). They are capitalizing on growing demand among vacationers to move away from orchestrated or staged tourism events that put culture or nature on display for passive observation. All the segments have recognized the demand for authenticity - a trend that is especially strong among conscientious and ethical consumers - and outbound tour operators and retailers are including specific language in their advertising copy that appeals to this demand. Those selling cultural tours, for example, are using phrases like "get real, get close"¹⁴⁴ and "unplanned cultural encounters"¹⁴⁵ or "real people, real cultures, real life experiences."¹⁴⁶ The High-end U.S. based operator Kuoda Tours invites its customers to "experience the real Peru."

Every product segment is moving away from static or passive vacations and toward dynamic, interactive, experiences, where travelers are active participants in their own vacations, and which is reflected in marketing and promotional materials. U.S.-based Geographic Expeditions in the High-end segment, for example, invites potential clients to a "joyful, in-depth investigation of interesting people, places and things."¹⁴⁷ In other words, travelers are not going to merely be shown attractions, they will be actively engaged with them. Similarly, Florida-based Nature Expeditions International, claims that its tours "offer interactive cultural experiences, not just passive visits to must-see sights."¹⁴⁸ In the Backpacking and Youth sector, advertisers are emphasizing active verbs like "explore," "discover," and "experience," and are describing trips as "action packed." Furthermore, print advertisements and outbound operator websites frequently include pictures of tourists directly involved in the activities - speaking with locals, on bicycles or climbing rocks, or learning local crafts, for example. The images suggest active participation and learning rather than passive consumption.

All of the product segments are responding to growing consumer demand for environmentally and (to a lesser extent) socially responsible practices, and they are putting 'green' messaging in their marketing mix. For example, Kepri tours from Canada describe their trips as "Adventure travel that allows you to discover the world's natural and cultural beauties while having a positive impact."¹⁴⁹ And German tour operator Colibri boasts on their home page that they are planting over 100 trees per flight.¹⁵⁰

For philanthropic travel, marketers emphasize how travel can make a difference to the destination countries. Tour companies may highlight the good work that has resulted from travelers' philanthropy and/or the positive results of the projects. Some examples from tour company websites:

Lindblad Expeditions

"Since 1997, guests traveling with Lindblad Expeditions have supported conservation efforts in the Galapagos Islands. As of October 2007, more than U.S. \$4 million has been raised from our guests for projects such as the eradication of feral pigs on Santiago and the support of National Park Marine Reserve patrol boats. Funds from our guests are contributed entirely to local projects, as determined by an independent board and implemented by the Galapagos National Park and Charles Darwin Research Station."¹⁵¹

Myths & Mountains

"Myths and Mountains and Nepal will forever be connected. Through our non-profit organization, READ Global, we are improving literacy by building a self-sustaining rural library system, bringing books and jobs to the countryside, and empowering thousands of Nepalese to improve their education, economic, and social condition."¹⁵²

Country Walkers

"For six years, Country Walkers, our guides, and our guests have supported the small Andean community of Patacancha, Peru. The primary project goal was to construct a dormitory for the children of the elementary school. To date the project has raised over U.S. \$13,000 and continues to grow. The school children of Patacancha are enjoying a two-story, five-room dormitory with facilities for 20 students. We are proud of this grass-roots project, and enthused that it is included on the Travelers' Philanthropy website providing a portal for guests to donate."¹⁵³

In terms of price, there is tremendous variation within each segment. Nature, Adventure, Cultural and Educational tourism all have luxury and budget offerings. With the exception of the Backpackers and High-end segments, however, a majority of trips sold through outbound tour operators tend to fall into the upper-middle or moderately upper price range. This may reflect the large number of travelers who are empty nesters (adult couples whose children have left home), well educated, and financially better off. Consumers like these can afford to pay more for holidays, and are willing to pay extra for the convenience of having multiple elements of their trip planned and coordinated by an outbound agent. In accordance with Maslow's Hierarchy of Needs (see Section 3.1), environmental and cultural responsibility are sometimes seen as elements of self-actualization. The wealthy can afford to have all of their personal comfort needs and desires met, so adding on elements of personal fulfillment like volunteering or minimizing one's environmental footprint can be a source of added value.

Backpackers and independent travelers can frequently access specific elements of the same vacations by going to destination countries and approaching local operators directly. By booking on-site, they cut out the middle man and save money. In exchange for low prices, however, they sacrifice the certainty and timeliness of a tour organized in advance from their home country. Flexibility is important in organizing tours and activities independently and there is a greater risk of poor service quality when booking on-site rather than relying on an outbound agent to vet for quality. Low prices and student or youth discounts are very attractive in this market segment. There is, as well, a sizeable market for semi-structured independent travel catering to the youth or young adult market that is organized from the home country. Here, the trips are much more expensive than those arranged on-site, but a portion of young travelers want help from agents in navigating the unknowns in a new destination.

3.2.2 Marketing Channels

Tourism retailers and wholesalers across product segmentation lines use virtually all of the marketing channels in existence. Here are the most prominent among them:

Internet	<ul style="list-style-type: none"> Nearly every operator selling to international markets has their own website and/or are part of websites figuring similar companies; many use static and pay-per click banner advertisements, search engine optimization techniques, search engine advertisements like Google AdWords, social networking sites like www.facebook.com; placement on destination or niche travel portals, blogs, etc.
E-mail	<ul style="list-style-type: none"> Most tourism retailers collect the e-mail addresses of their past clients and many attempt to keep them engaged and aware of the tour company's services through intermittent messages or newsletters.
Direct mail	<ul style="list-style-type: none"> Most tourism retailers collect the mailing addresses of their past clients and many attempt to keep them engaged and aware of the tour company's services through intermittent letters or colorful newsletters.
Television	<ul style="list-style-type: none"> Paid advertising on television is an expensive option. It is most often done by ministry of tourism of destination countries or by a collection of private sector vendors from the destination via the chamber of commerce or tourism. The growing range of tourism related television programming offers opportunities for tourism companies, especially those with special appeal or innovation, to be featured in programs. This free publicity is also seen by viewers as more neutral since it was not paid for by the tour operator.
Radio	<ul style="list-style-type: none"> Can be a cost effective way to reach a mass audience in target urban centers and, as with television, there may be opportunities to be included in programs.
Billboard Advertisements	<ul style="list-style-type: none"> Major metropolitan areas. City busses and bus stops, trains, buildings, etc.
Trade Shows	<ul style="list-style-type: none"> Important, but very expensive. Many operators interviewed said that they have attended shows for years and found them to be an effective way to generate business. A few said that the value was diminishing.
Print	<ul style="list-style-type: none"> One of the primary marketing channels used by responsible tourism operators. This includes magazine advertisements in outdoor, adventure, nature and lifestyle magazines, plus in travel sections of newspapers; however, with the economic recession and decline in newspaper publishing fortunes, many special travel sections have been reduced or eliminated. As with broadcasting, it is both cost free and perceived as more objective if tourism businesses can be included in travel stories.
Guidebooks	<ul style="list-style-type: none"> Securing a separate listing in travel guidebooks for your destination or services is essential. Guidebooks are a premium source for information among international and domestic travelers, and if you're not listed, many will not know you exist. See Annex III for a complete analysis.

Word of Mouth	<ul style="list-style-type: none"> ● Extremely important. Requires continually meeting or exceeding the expectations of customers. Satisfied customers regularly give travel recommendations to their friends and family based on their positive (or negative) experiences.
Personal Selling	<ul style="list-style-type: none"> ● Most prominent among Backpackers, Youth and Volunteer segments as companies go to college campuses for special events to make in-person presentations, distribute flyers, and sell trips to individuals and groups of friends. Also good for other group travel, reaching alumni, and student travel groups, as well as to museums and clubs.
Awards	<ul style="list-style-type: none"> ● A number of international contests annually recognize businesses for outstanding service quality as well as responsible environmental and social operating practices. By implementing some of these practices and then entering (and winning) contests, businesses can gain valuable acclaim and positive press.
Publicity and Public Relations management	<ul style="list-style-type: none"> ● Publicity is “nonpaid communication of information about an organization's services,” while public relations refers to “all the activities that a hospitality and travel organization uses to maintain or improve its relationship with other organizations and individuals.”¹⁵⁴ Larger outbound tourism companies have in-house public relations (PR) managers whose job is to encourage the travel industry, popular press, travel writers and guidebook authors to feature their companies. This can be an excellent way to generate business. It is important to note, however, that although the articles or features may be nonpaid, there are still expenses involved in proactively generating this type of publicity.

An additional marketing channel available exclusively to operators and destinations implementing responsible practices, is participating in non-profit or development agency programs. A number of international and domestic organizations like SNV, Rainforest Alliance and others are encouraging the uptake of good practices. Attending training workshops and actively implementing recommendations can lead to unique networking and marketing opportunities (see Section 5.1.4 for more).

3.2.3 Distribution channels

Responsible tourism vacations are distributed in largely the same ways as conventional holidays: via direct distribution to independent travelers, or indirectly through intermediaries like retail travel agents, outbound tour operators, or other wholesalers.

Rise of the Internet

In the destination countries, many hoteliers and tour operators now have the capacity for consumers to make bookings and payment directly through their own websites. It is highly recommended that destination companies in all product segments have this capacity and make the process of gathering information and paying for services directly online as easy as possible. This is especially essential for those businesses servicing the youth market.

Travel intermediaries like outbound tour operators and other wholesalers have made especially good use of the Internet as the medium has evolved. Websites have grown from attractive photographs and clearly displayed information to flash-based websites, video content,

interactivity, and most recently, online social networking. Online wholesalers like Expedia.com, Orbitz.com and many others have used online technology to meet consumer demand for transparency in pricing and price comparisons.

In the responsible tourism market, some for-profit and non-profit intermediaries have attempted to compile directories of responsible tourism products, some of which allow for online booking. Among the most important are:

- responsibletravel.com
- Planeta.com
- Sustainable Travel International's Eco Directory
- The International Ecotourism Society's (TIES) Travel Choice Directory
- Rezhub.com/greentravel
- Ecotourdirectory.com
- istaygreen.org
- Earthfoot.org
- Ecoclub.com
- Greenhotels.com
- eco.orbitz.com
- Rainforest Alliance's Eco-Index Sustainable Tourism – eco-indextourism.org

Continued strength of outbound tour operators

Two important trends are behind the continued strong use of outbound tour operators as a channel for packaging, marketing, and selling responsible tourism holidays. First is the demographic shift in outbound markets toward older travelers that are willing to pay to have their vacations (responsible or otherwise) planned for them. Baby Boomers, the oldest of which are in their early 60's, are continuing active lifestyles into retirement. Though more adventurous and Internet savvy than earlier generations, they still prefer the assurances of booking through a company located in their home country that can help manage their international travel. As more of them approach retirement, they will be traveling more frequently and are likely to continue to rely on outbound operators rather than book independently.

Second, many outbound travelers from the United States and to a lesser degree from Europe and Canada are 'time poor.' They may have money for travel, but are constrained by a short amount of holiday time (see section 3.2). So, to get the most out of their limited time, they are likely to turn to outbound tour operators to help them plan their trip. Outbound operators offer help in smoothing the wrinkles of travel on a tight timeline, help make holidays hassle-free, and are someone to hold accountable if things go awry.

Online wholesalers

As Internet usage climbs among all consumer groups (especially the wealthy and educated who tend to be attracted to responsible tourism), online wholesalers have become massive distributors of travel services. Expedia is the largest online wholesaler, followed in order by Orbitz/Sabre, Travelocity, and Priceline/booking.com. Expedia.com claims 60 million monthly visitors, 475,000 hotel shoppers per day, and 730,000 flight shoppers daily. They have multiple brands, including Expedia.com, Trip Advisor.com, Hotels.com and Hotwire.com, in addition to affiliate programs like AARP Travel which reaches a large audience of U.S. retirees and Sam's Club travel which has wide distribution as well.

These huge players service the mainstream and conventional markets, but are moving into responsible tourism. Expedia.com has a green hotels corner of their site at http://www.expedia.com/daily/sustainable_travel/going_green/green_hotels.asp that uses

experts to select 'green' hotels and uses a traditional star rating system to show quality. They have also partnered with the United Nations Foundation to market responsible holidays to UNESCO World Heritage sites. They plan to grow the green corner of their site now that the Sustainable Tourism Criteria have been released.¹⁵⁵ Orbitz.com also has a 'green' travel site (www.eco.orbitz.com) that emphasizes ecotourism, offers tips and advice to responsible travelers, and allows vacationers to book 'Energy Star' hotels. The site was not easy to navigate to from Orbitz's main page, however.

3.2.4 Social and environmental standards applied

While generalizations are difficult because of the wide variety of providers, it is safe to say that the majority of companies in these product segments pay relatively little attention to environmental and social justice concerns in their daily operations. When asked about environmental or social criteria used in selecting in-country service providers, most North American and European outbound operators we interviewed (who we had previously identified as serving the responsible tourism market) said that they do have such criteria. They explained that they make their contracting decisions on many factors, of which good environmental and social management by potential suppliers is only one of them. In general, outbound tour operators, in-country providers, and the traveling public focus first on health and safety, service, and value for price, with environmental and social policies and management becoming important only after the more basic concerns are addressed.

That said, there is a growing emphasis on environmental and social standards in the product segments. The reasons for this include:

1. Consumers using these product segments are predisposed to sensitivity toward environmental stewardship.
2. There is a growing sense of duty and urgency among North American and European consumers to act as stewards of natural areas.
3. Service providers in these product segments are increasingly aware of their own business' dependence on in-tact ecosystems, and are therefore more likely than in the past to implement good environmental practices.
4. Increasing efforts from conservation groups, industry associations, (PADI, hiking societies, guiding guilds, TIES and national and regional ecotourism societies, etc.) to educate providers on good practices.
5. It has become common practice for outbound retailers of tours in every product segment examined here to incorporate environmental criteria when selecting on-the-ground service providers.
6. Nearly all the retailers that the research team encountered during multiple web searches had posted ethical or responsible guidelines on their website, and these frequently include environmental criteria.

Nevertheless, environmentally destructive practices remain common among in-country service providers for several reasons:

1. The number of 'green' certification programs measuring environmental and social impacts is still relatively limited.
2. There is widespread ignorance of good practices and the negative impacts of poor practices.
3. Many of the tours in these segments (with the exception of High-end) have low barriers to entry, which means that new providers are starting up quickly, and they may be unfamiliar with responsible operating practices.

4. The margin of profit is usually small and environmental and social reforms are typically viewed as costing more, although conservation measures (of water, electricity, etc.) typically save money.
5. Some good practices require up-front investments in technology and are often a deterrent. There may also be scarcity of supply of environmentally-friendly technology or services in destination countries. (e.g. no eco-friendly cleaning solutions or battery recycling available).
6. While the number of conscientious and ethical tourists is increasing, they still represent a small slice of the total. One tour operator noted, "A lot of Nature-based tourism consumers do seem to care about good environmental practices, but hardly anyone is checking under the hood."
7. Mistakes made by tour operators in these segments are sometimes magnified by their physical proximity to sensitive natural areas.

Interviews with outbound tour operators indicate that European operators more often implement environmental and social criteria than do their North American counterparts. When asked why they take into account environmental and social considerations when selecting service providers, several explained that their customers expect that they do so and if they did not, they would get negative publicity. A number did concede that (as in the U.S.) few customers ask the tough questions or dig for evidence of good practice.

Major efforts are afoot to minimize damage to natural habitat and native culture in tourism destinations. Ecotourism entrepreneurs have led the way by developing good practices and these are infiltrating the broader industry. The Rainforest Alliance, United Nations World Tourism Organization, United Nations Environmental Program and United Nations Foundation, along with a host of other non-profit, inter-governmental, government, and tourism industry leaders have launched the 'Global Baseline Criteria for Sustainable Tourism.' These criteria represent a "minimum standard that any tourism business should aspire to reach in order to protect and sustain the world's natural and cultural resources while ensuring tourism meets its potential as a tool for poverty alleviation."¹⁵⁶ These Criteria will be used the standards used by the Sustainable Tourism Stewardship Council (STSC), the global accreditation body, which is about to be launched. These are extremely important steps forward in promoting and implementing sustainability through the expansion of voluntary certification programs. See <http://www.rainforest-alliance.org/tourism.cfm?id=council> for more information.

Travelers' philanthropy

There is a new movement among responsible tour companies to participate in travelers' philanthropy programs or offer philanthropic travel options. "Travelers' philanthropy" is a term that is less than a decade old and appears to have originated in the United States. According the Center for Responsible Travel (CREST), travelers' philanthropy is a relatively new concept, but is rapidly growing into a worldwide movement and becoming part of the definition of responsible travel. At its core, travelers' philanthropy is about tourism businesses and travelers 'giving back' to tourism destinations by providing financial support, expertise, and material contributions to local projects and community initiatives.¹⁵⁷

According to CREST co-founder and Co-Director, Dr. Martha Honey, "Oftentimes, people who vacation in poor parts of the world are moved to try to help by either volunteering or donating financially or materially to those in need. But these good intentions can have negative impacts." Travelers' philanthropy programs and tour operators who specialize in philanthropic travel aim to minimize these negative impacts while providing vast benefits to the destinations they hope to help. This type of travel is prevalent among all product types – from backpackers who have time to volunteer, to passionate conservationists on nature tours and High-end travelers who can make large donations. Visit www.travelersphilanthropy.org to learn more.

3.3 Nature-based Tourism (including Ecotourism)



3.3.1 Definitions

Nature-based tourism. This market segment is defined as “any form of tourism that relies primarily on the natural environment for its attractions or settings” and it includes activities such as hiking, camping, guided nature walks, birding, wildlife viewing, SCUBA diving, snorkeling, kayaking, canoeing, and photo safaris. Ecotourism falls within Nature-based tourism but is more rigorous, stating that the impact of nature-based tourism should be that it “conserves the environment and improves the welfare of local people.” (See Section 2.1- Key Definitions)

While the definition of Nature-based tourism is value-neutral, in practice, activities listed in this category do not include ones that degrade the integrity of the habitat, such as snowmobiling or 4 x 4 off-road driving. In addition, activities that involve risk taking, such as extreme kayaking, canoeing and rafting are classified as Adventure Tourism. As the widely used figure below illustrates, beach holidays, typified by sun-and-sand resorts, are also not included in the working definition of Nature-based tourism because they attract a much broader consumer group and do not generally focus on observing or learning about nature (Figure 9).

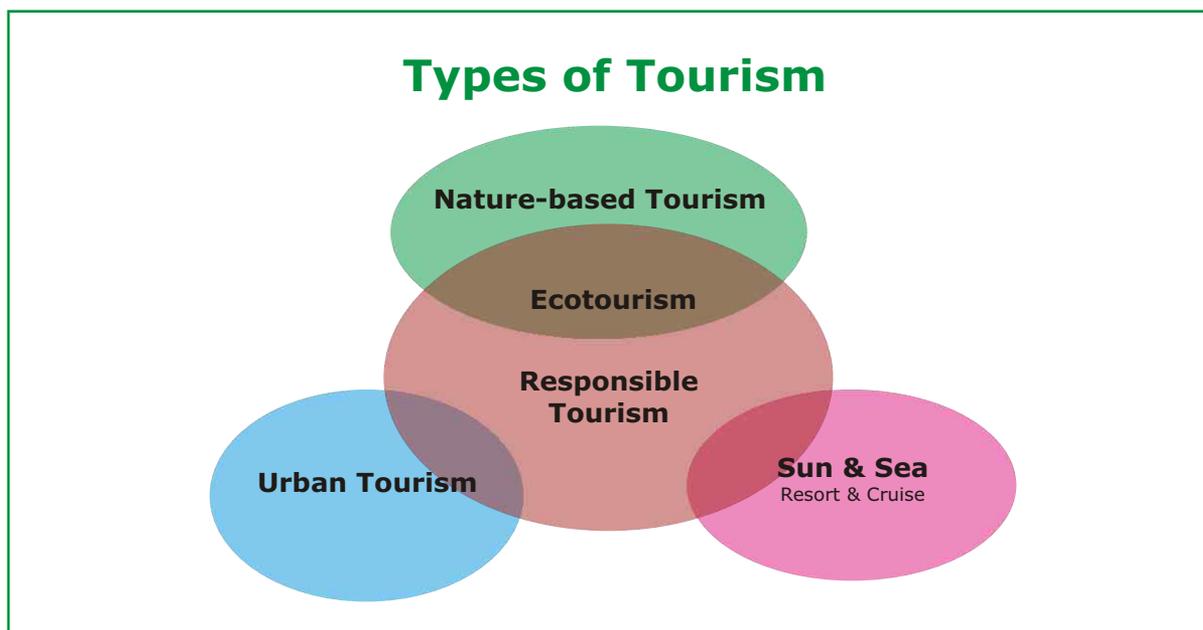
Use and acceptance of the definition

The term appears to be in active use among marketers and consumers in North America and Europe. According to a review of websites for outbound tour operators, retailers for Nature-based tourism activities frequently use the terms “nature tours” or “natural tours” when describing these activities to consumers. Many outfitters that offer a variety of holiday types explicitly list “nature” or “natural” tours among their product categories. Spain is an exception, however, as retailers selling trips to Latin America rarely list “tours de naturaleza” as a separate category even though nature-based activities are included in the trips.

Responsible Tourism elements in Nature-based tourism

Because it includes ecotourism, Nature-based tourism is the product segment that lends itself most easily to environmental and social responsibility. The diagram below is widely used to describe different types of tourism and show that the goal is to increase the sustainable/responsible tourism circle so that, gradually all types of tourism become sustainable or responsible.

Figure 11 : Types of Tourism Included in Nature-Based Tourism.



Source: Amos Bien, Costa Rica

3.3.2 Consumer profile

Table 13 is a general profile of travelers involved in Nature-based tourism.

Table 13: Consumer Profile - Nature-Based Tourism

Key Points	Consumer Profile -> Nature-Based Tourists
Motivations	<ul style="list-style-type: none"> ● Want to see wildlife in natural settings. Gratified, feel in touch with nature. ● Are sensitive to the environment and want to do no harm. ● Exploration. Go to remote locations. Want to see more of the world, interested in landscape, flora and fauna. Want to see things before they are gone. ● Looking to be up close and personal with animals and nature. ● Get away from city life. Likes to be out in nature and does not mind moderate physical activity.
Demographics/ Psychographics	<ul style="list-style-type: none"> ● Come from all demographic groups, but particularly strong interest among the older age groups. ● Tend to be highly educated with good income. ● Environmentally conscience.
Key activities or interests	<ul style="list-style-type: none"> ● See wildlife in natural settings. ● Visit national parks, nature reserves and protected areas. ● Visit rainforests, jungles, unique natural or geographic habitats (e.g. UNESCO sites). ● Stay in the wilderness, camping. ● Soft adventure activities, e.g. walking, hiking, SCUBA diving.

3.3.3 Segment trends

It is estimated that 20% - 40% of all international tourists have an interest in some form of wildlife watching. The general characteristics of wildlife tourists from North America and Europe are that they are on average 43 years old, travel with a partner, are from a higher socio-economic group, educated, physically active, interested in the environment, and the majority are women (52%).¹⁵⁸

Nature-based tourism is expected to increase at least as fast as or faster than the 5% annual growth rate of world tourism as a whole.¹⁵⁹ This is due in part to a growing number of urban dwellers who crave contact with nature and "authentic experiences," such as viewing wildlife in natural habitats as opposed to at the zoo. Further, many tourists seek the adventure of visiting distant or exotic in-tact habitat as well as rare and endangered species. There is also a strong and growing "see-it-before-it's-gone" niche within Nature-based tourism.

Interest in Nature tourism is also being driven by the increase in nature programming on television in major source markets. The past 15 years in the U.S., for instance, dedicated cable channels such as the Discovery Channel, Animal Planet, and National Geographic have increased. In interviews, outbound operators said that many of their clients say their vacation choices were motivated by wildlife programs.

3.3.4 Position in the market, promotional strategies and price

Generally speaking, nature-based tours sold by outbound operators fall in the upper-middle to upper price range. This is determined partly by the demographics of the typical Nature-based tourism consumer who can typically afford to pay more and is willing to pay for the convenience of having the holiday planned and coordinated by a professional. Additionally, nature tours tend to require more customized service and smaller group sizes which raises the price per person.

Backpackers can frequently access specific elements of nature-based tours at the much lower price by going to destination countries and engaging local operators directly. In exchange for low prices, however, they sacrifice the certainty of advance bookings, must have flexibility in when and where they go, and may not receive as high standard of service from on-site service providers as that provided by operators in the outbound countries.

Wildlife and nature-based tours are frequently advertised under the umbrella of 'reconnecting with nature.' For example, Canadian-based G.A.P Adventures invites visitors to choose one of its Wildlife/Nature Tours in order to "get in touch with your inner monkey." The promotional material goes on to say:

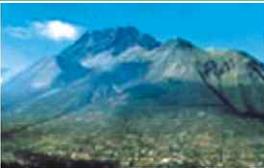
"It's often said we don't truly appreciate something until we lose it. As the fragility of our natural world becomes more and more evident, we find ourselves increasingly drawn to places where we can reconnect with the earth, no longer spectators, but again a part of the earth. With little control over the experience, contact with untamed wildlife is a gift and a blessing, a humbling reminder of how removed from nature our lives have become."¹⁶⁰

Promotional images

Promotional materials from many tour operators emphasizes knowledgeable expert guides, the "pristine" beauty of areas untouched by human activity, and the spiritual relationship that travelers find with nature. As can be seen in the following chart, the language used by tour operators to promote nature tours includes spiritual phrases such as "sacred," "awed," and "nature's power." Time spent in nature is depicted as an experience which will take the traveler

back to some previous idyllic state; it will “restore” your zest, “renew” your energy, and “reconnect” you with nature. The imagery used to appeal to travelers showcases the natural landscape and local flora and fauna, with few instances of people being included in the photos.

Table 14 : Examples of Promotional Imagery Used in Nature-based Tourism

Nature-based Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
			
Elevate Destinations (U.S.)	www.elevatedestinations.com	natural landscape, some local/native peoples and flora & fauna	"no mere tourist experience," "restore your zest for life," "your exploration... will leave you awed and renewed by Nature's powers"
			
Gap Adventure Travel (N. America, U.K., Australia, New Zealand)	www.gapadventures.com	natural landscape, flora & fauna, nature activities	"get in touch with your inner monkey," "reconnect with the earth," "get back to nature,"
			
The World Outdoors (U.S.)	www.theworldoutdoors.com	natural landscape, flora & fauna	"explore the islands that inspired Darwin," "enchanted landscape," "dramatic backdrop," "extraordinary experience," "magic"
Additional Examples of Images			
			
Duma Naturreisen (Germany)	Sommer Fernreisen (Germany)	Wereldcontact (Netherlands)	SNP (Netherlands)

Source: Compiled by CREST, 2009

3.3.5 Current marketing and distribution channels

Outbound operators in this segment use a broad array of marketing channels to reach the target consumer groups. Print and online media are most popular with advertisements in U.S. magazines like National Geographic Adventure, Smithsonian, Outdoors, Men's Life, and Shape. See Annex IV for additional resources.

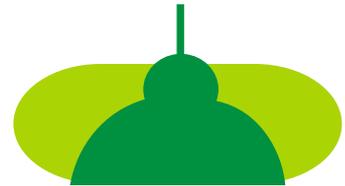
The following box provides a list of the main nature and wildlife travel magazines and their websites in the target European countries.

BBC Wildlife Magazine	http://www.bbcwildlifemagazine.com
Camera Natura	http://www.cameranatura.se -Swedish magazine on nature photography
Ecologist Magazine	http://www.theecologist.org -British magazine on environmental affairs
Geographical	http://www.geographical.co.uk
Grasduinen	http://www.grasduinen.nl -Dutch flora and fauna magazine
National Geographic	http://www.nationalgeographic.com
Naturblick	http://www.1a-grafiks.de/Naturblick.html -German magazine on travel and nature photography
Quercus	http://www.quercus.es -Spanish magazine on nature travel
Rainforests	http://www.naturealert.org
Travel with a Challenge	http://www.travelwithachallenge.com -Geared toward older travelers
Vår Fågelvärld	http://www.sofnet.org -Swedish magazine on birds and bird watching
Verträglich Reisen	http://www.vertraeglich-reisen.eu -German magazine on environment-friendly travel
Wildlife Extra	http://www.wildlifeextra.com -British magazine on wildlife watching

3.3.6 Social and environmental standards applied

The standards discussed above in section 4.2.4 apply to Nature-based tourism, but the growing interest among consumers to see responsible practices by their suppliers is stronger due to the influence of ecotourism within this sector.

3.4 Cultural Tourism and Community-based Tourism



This section examines the Cultural Tourism segment, along with an important sub-segment, Community-based tourism (CBT). It is important to note that cultural learning and exchange is a part of nearly all tourism segments regardless of the classification of the specific product.

3.4.1 Definitions

Cultural Tourism. For this report, the World Tourism Organization's definition of cultural tourism is used: "the movement of persons for essentially cultural motivations."¹⁶¹ Cultural Tourism is a broad term and includes many activities: tours based around arts, such as museum, architectural, theatre; culinary tours; tours centered around indigenous people or ethnic groups; travel to festivals; visits to historic sites and monuments; and folklore and pilgrimages. Cultural tourism is also about immersion in and enjoyment of the lifestyle of local people and the local area's identity and character.

Community-based Tourism, as a specific form of Cultural Tourism, is defined as "tourism that is initiated, owned and operated by local residents (often rural, poor, or economically marginalized people)."¹⁶² This subsector has been growing rapidly in developing countries. Perhaps more than any other segment, Cultural Tourism and particularly Community-based Tourism brings the traveler into close contact with people in the host destination. This interaction and exchanges needs to be based on sound environmental and social practices in order to preserve and enhance local culture and ensure that tourism revenue contributes to poverty alleviation. CBT puts the emphasis on shared leadership emphasizing community well-being over individual profit, balancing power within communities, and fostering heritage and local culture and conservation and responsible stewardship of the land. In general, CBT travelers have not been well-studied. According to the CBI, tourists using community-based facilities mainly come from England, Germany, and the Netherlands, and they generally travel to warmer destinations where they can experience authenticity and learn something new about other cultures.

Non-profits that support Community-based Tourism help communities become aware of the commercial and social value of their natural and cultural heritage, and thereby foster community-based protection of these resources. In developing tourism projects, communities sometimes choose to partner with the private sector to provide capital, clients, marketing, quality control, or other types of support. It is vital that the negotiations between communities, NGOs, the private sector and other actors be transparent and agreements be written in the local language in order to ensure that local people gain a fair share of the benefits (profits) and a role in the development and management process. CBT activities and services may include accommodation arrangements (e.g. home stay or lodge), cultural demonstrations (e.g. cooking, weaving, craft making), cultural performance (e.g. music, dance, storytelling), and providing services such as transportation or guiding.¹⁶³

3.4.2 Consumer profile

Below, is a general consumer profile of the responsible Cultural Tourist (in addition to the characteristics described in Section 2):

Table 15 : Consumer Profile: Cultural and Community-Based Tourism

Key Points	Consumer Profile of Cultural Tourists
Motivations	<p><i>Cultural tourism</i></p> <ul style="list-style-type: none"> ● Learn about other cultures. ● Authentic experience through interaction. See the real culture. Interaction with local people. ● See famous cultural and historical sites. <p><i>Community-based Tourism</i></p> <ul style="list-style-type: none"> ● Stronger desire for authenticity. ● Direct cultural exchange. ● Nostalgic feelings towards simplicity and rural areas. ● Good feelings from helping poor communities.
Demographics/ Psychographics	<ul style="list-style-type: none"> ● Come from all demographic groups. ● Often between 30-50 years old with high double incomes. ● Highly educated. ● Backpackers and younger travelers on small budgets participate in CBT, as accommodations may be cheaper.
Key activities or interests	<ul style="list-style-type: none"> ● Visits to points of historical and archaeological significance e.g. UNESCO sites. ● Attend festivals and holidays. ● Creative activities e.g. learn pottery, painting, weaving, cooking. ● Stay in community. ● Learn local language and culture

Source: CREST, 2009.

3.4.3 Segment trends

Cultural tourism based around cities, museums, and monuments has long been a staple of mainstream tourism. Today, more large tourism retailers offer long-haul holidays to famous historical sites such as Angkor Wat or Machu Picchu. Many of these trips are High-end, with an emphasis on both culture and comfort. According to the European Travel Commission, there is a gradual shift among travelers toward more general interests in culture, rather than specific cultural icons, and this suggests that there will be a greater need to combine cultural, leisure, comfort, and entertainment products in the future.¹⁶⁴

Among alternative tour operators, culture and history tours have long been popular. However, as awareness and interest in other cultures grows, there is an increasing demand to interact with local communities. More specialized culture tours are offering possibilities to include home stays

as part of the cultural tour experience. As part of the trend toward authenticity and interactive holidays, more consumers also want immersion in the language, customs, crafts, cuisine, and other cultural aspects of the region visited. In some cases the home stay may even increase the price of the tour package. Among tour companies directed at a younger crowd where amenities may not be so important, cultural tours may be priced lower.

3.4.4 Position in the market, promotional strategies and price

Mainstream vs. niche tourism. Long haul cultural trips are becoming more popular including visits to World Heritage sites like the Galapagos Islands, Machu Picchu, and the Great Wall of China. Even in mainstream tourism, there is the opportunity to "experience" local life. For example, iExplore, an independently operated division of TUI Travel PLC, offers exclusive cultural tour packages to destinations like Peru and Nepal through the major web based retailer, Expedia.com. These tours typically focus on "soft" sightseeing, minimal and managed contact with local people, and comfort with accommodation at 3- star hotels and above. A 2003 Mintel survey in the U.K. found that respondents were nearly twice as interested in feeling they were "off the beaten path" than in ensuring that their tourism dollars benefited the local economy.¹⁶⁵

In contrast, niche cultural tour operators have a stronger emphasis on engaging more deeply with local cultures. Many of the tour operators interviewed noted that their clients are more interested in local culture than in the past. They also reported that their clients are more aware of sustainable development and environmental issues and that this is impacting their holiday choices. In a similar vein (but in contrast with the Mintel survey cited above), a 2002 Tearfund survey of the U.K. market found that 27% of the people surveyed were interested in knowing how to support the local economy and meet the local people while on holiday.¹⁶⁶ Even more significantly, a 2003 survey of U.S. travelers found that 62% said it is important that they learn about other cultures when they travel.¹⁶⁷

A review of websites shows that cultural tourism is marketed through phrases such as "experience traditional life", "the opportunity to make new friends", "enjoy the hospitality of", "discover culture, tradition", etc. The website copy of the U.K. company Exodus states, "It's the people of these communities and their day to day lives which can be as fascinating as the spectacular palaces most tourist flock to see."¹⁶⁸ The range of cultural activities can vary from short stops at an indigenous village and local craft market, to a demonstration of tribal dance or cooking, to more creative and extended holidays where the visitor learns from traditional crafts people over several days.¹⁷¹

Community-based Tourism. As a segment within Cultural Tourism, CBT represents a small portion of the overall outbound market in North America and Europe mainly due to its relative unfamiliarity among travelers and the challenges of successfully running a community-owned business. In practice, what constitutes CBT also varies. Some tour operators emphasize that accommodations must be locally owned and operated, while others say that local people must be the primary beneficiary, even if non-locals are involved in owning, financing, or managing the business. A leading web portal for responsible products, www.responsibletravel.com, has developed a CBT database to assist travelers in finding community initiatives. In February 2009, there were 53 specific CBT holidays available on the site. Many were community-run accommodations which varied widely in price, from as low as \$3 up to \$160 per night. In total, this responsible travel site includes over 3400 holidays from 270 tour operators. CBT therefore appears to be a very small portion of responsible tourism – at least of the offerings handled through outbound tour operators.

For tour operators who offer CBT, it is often one component of a package deal (similar to home stays in Cultural Tours). These trips often include some type of volunteer experience ('voluntourism') in a local community. Marketing materials frequently include explanations of how CBT trips benefit the local community. For instance, the website of Hands Up Holidays states:

*"Community Based Tourism is tourism that maximizes the benefits to the local community - akin to 'Fair Trade' markings on food and drinks. In these communities, tourism is embraced as a source of sustainable employment and income.... On these trips, accommodation is locally owned and run, we eat in local restaurants that source their food locally, utilize public transport where practicable, and of course as on all our trips, use a local guide. Whilst all of our trips contain an element of community based tourism, those that feature exclusively locally owned and operated accommodation are highlighted in our community based tourism trips."*¹⁶⁹

Community-based Tourism is further complicated by the individualistic nature of its customers. According to a study of European market, "the CBT tourist" does not exist.¹⁷⁰ Instead, each traveler who seeks a CBT experience is different and thus it is difficult to characterize what types of activities and experiences fit within the market segment. For new CBT initiatives, a potential way to develop and strengthen the business may include targeting, at least initially, the backpacker segment. Backpackers are often independent travelers that want an authentic experience, have a lower budget, greater time flexibility, and lower comfort standards.

Several tour operators noted that the difficulty of offering CBT is further compounded because community businesses often lack reliability, quality service, and communication channels that are all key to working successfully with suppliers overseas. Given the difficulties of competing in the international tourism market, local communities can often benefit by partnering with local ground operators who act as intermediaries in making bookings with outbound operators. Also, given that there are many CBT initiatives that have started and failed, a strong in-country partner - either an NGO or a private business - is often essential to assist with marketing, quality control, consumer needs, and sustainability issues.

CBT incorporated within tours is often priced similarly to other tour packages without CBT in the mid- to upper market range, despite the fact that comfort levels may be lower than other packages at a similar price point. This is acceptable to the consumer as they believe that the community will benefit more directly.

Promotional images

Most of the promotional images used by Cultural Tour operators portray their tours as representative of a people or town's true character in addition to highlighting the most famous historical and cultural sites (e.g. Machu Picchu, Tikal Ruins, etc). Through advertising copy, tourists are enticed by the opportunity to "really get to know" a particular destination, "step into the lives of locals," and have their expectations "surpassed...by the reality." The imagery used by this particular segment features native and local peoples, indigenous arts and crafts, and architecture much more than other segments as if to provide a stark contrast to Western lifestyles. Portrait-style images of local peoples are commonly used, as if to imply a more 'up close and personal experience'. Images of the natural and cultural landscape are also used frequently. In CBT, there is a stronger emphasis on the rural appeal and interaction between visitors and the local peoples.

Table 16 : Examples of Promotional Imagery used in Cultural Tourism

Cultural Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
 <p>The Real Peru</p>	 <p>www.therealperu.co.uk/</p>	 <p>predominantly cultural landscape</p>	 <p>"this magical country," a service to all those people who want to really get to know the country," "we want you to come back feeling Peruvian"</p>
 <p>Culture Xplorers</p>	 <p>www.cultureexplorers.com</p>	 <p>natural/cultural landscape, native/local peoples</p>	 <p>"get real, get close," "experience local life from ground level - up close and personal," "a fresh, authentic perspective," "places where ancient traditions still survive, and even thrive"</p>
 <p>Intrepid Travel (Australia)</p>	 <p>www.intrepidtravel.com</p>	<p>native/local peoples, some landscape</p>	<p>"real people, real cultures, real life experiences," "step into the lives of the locals, find out what makes the city tick"</p>
 <p>Tribes Travel (U.K.)</p>	 <p>www.tribes.co.uk</p>	<p>cultural landscape, natives/locals</p>	<p>"a gem of a country," "characterful hotels," "extraordinary country," "whatever the expectations, they are surpassed by the reality"</p>

Table 17 : Examples of Promotional Imagery used in Community-Based Tourism

Community-based Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
 Viajes Responsables (Spain)	 www.viajesresponsables.com	 locals and travelers interacting, cultural landscape	 "su viaje afecte de forma positiva a la población del destino que se visita," "participar en el desarrollo local de tres comunidades indígenas organizadas"
 Paso de Noroeste (Spain)	 www.pasonoroeste.com	 locals and travelers interacting, cultural landscape	 "disfrutar del país, vivir su realidad," "benefician directamente a la población autóctona," "no solo pasar por encima del destino sin profundizar en él"
 Global Exchange (U.S.)	 www.globalexchange.org	 natives/locals and interacting travelers	 "travel can be educational, fun, and positively influence international affairs," "working toward positive change"

Source: Compiled by CREST, 2009.

3.4.5 Current Marketing and Distribution channels

As Cultural Tourism is a broad segment, distribution channels vary widely. Internet and traditional travel agents continue to play an integral role in mainstream tourism. Specialty tour operators who focus on offering 'real' or 'authentic' experiences are a major player in cultural trips that include substantial contact with local peoples. Depending on the price point and the target, print advertising or Internet ads on specific travel sites such as of National Geographic Traveler or Smithsonian Magazine continue to reach a higher-educated and income clientele.

In the case of CBT, marketing is a particular challenge, partly due to the lack of resources by the communities themselves. Key distribution channels include partnerships with NGOs, and inbound and outbound tour operators who are able to promote the individual CBT on their own websites and with their own travel agents. Joining a network with other CBT initiatives can

strengthen the overall potential of community tourism businesses in a given country. Some CBT initiatives have developed distribution channels through partnership with inbound companies. For example, Chalalan Ecolodge in Bolivia was able to attract a critical mass of visitors with help from their La Paz-based partner, America Tours. In addition, CBT's can gain exposure through web portals such as www.responsibletravel.com, and participation in trade fairs (see 4.2.3. above).

3.4.6 Social and environmental standards applied

Many tour operators and accommodations involved in Cultural tourism provide guidelines to their travelers about correct behavior, respectful dress, cultural nuances, and ways to minimize impact and protect fragile or historic sites. More and more outbound operators have developed Corporate Social Responsibility (CSR) policies that incorporate social and environmental sustainability into their overall business model, including respect for culture and cultural sites. Several of the tour operators interviewed said they provide details of the ways in which their company supports specific community projects through travelers' philanthropy.

In addition, the Global Baseline Criteria for Sustainable Tourism contains many elements that relate to Community-based Tourism. These include the British-based Tourism Concern, which has long championed CBT, and has a useful 10-point list of what responsible community tourism should include:¹⁷²

1. Be operated with the involvement and consent of local communities. (Local people should participate in planning and managing the tour.)
2. Give a fair share of profits back to the local community - Ideally this will include community projects (health, schools, etc).
3. Involve communities rather than individuals, because working with individuals can disrupt social structures.
4. Be environmentally sustainable. Local people must be involved if conservation projects are to succeed.
5. Respect traditional culture and social structures.
6. Have mechanisms to help communities cope with the impact of western tourists.
7. Keep groups small to minimize cultural / environmental impact.
8. Brief tourists before the trip on appropriate behavior.
9. Not make local people perform inappropriate ceremonies, etc.
10. Leave communities alone if they don't want tourism. People should have the right to say 'no' to tourism.

3.5 Volunteer and Educational Tourism



3.5.1 Definitions

Volunteer Tourism. Broadly speaking, any type of holiday that includes voluntary service in the destination is considered volunteer tourism. The tourist does not receive any type of financial compensation while undertaking various types of work, and in many cases, must provide financial contributions. Researchers are finding that volunteer tourism can take two distinct forms based on the participants' mindset: the 'volunteer-minded' versus the 'vacation-minded' traveler.¹⁷³ Brown and Morrison¹⁷⁴ suggest that the 'volunteer-minded' individuals would devote most or all of their vacation time to volunteer activities at the destination. These trips are often

referred to as service or mission trips. In contrast, the 'vacation-minded' spends a small portion of their vacation participating in volunteer activities. This type of holiday is sometimes referred to as "voluntourism." Voluntourism is defined by VolunTourism.org as: "The conscious, seamlessly integrated combination of voluntary service to a destination and the best, traditional elements of travel - arts, culture, geography, history and recreation - in that destination."¹⁷⁵ In these trips, tour operators provide the tourists with opportunities to participate in optional excursions that have a volunteer component which typically includes some cultural exchange with the local people. As elaborated below, our research finds that there are distinct differences between volunteer tourism (voluntourism) and volunteer-focused tourism and that these differences need to be reflected in how each is marketed.

Educational tourism. For the purpose of this study, Educational Tourism is defined as travel to participate in educational experiences overseas, but not enrollment in a study abroad program for credit. Many volunteer organizations that are mission driven offer learning trips for school groups (high school and university level, and in some cases adults) in which they gain practical experience in some cultural, scientific, or community development fields. Participants take part in activities that are similar to those of volunteer tourists, and ultimately contribute in some way to either scientific research, and/or community development.

Types of volunteer experience

There are a wide range of volunteer activities. Table 18 outlines some examples of popular trips.

Table 18 : Summary of the Types of Volunteer Activities

	Examples of Popular Activities
Conservation & wildlife	<ul style="list-style-type: none"> Monitoring or working with wildlife (e.g. turtle conservation, animal sanctuaries, wildlife rescue), nature conservation (e.g. marine, rainforest, protected areas, etc.)
Community projects	<ul style="list-style-type: none"> Renovating buildings (construction, painting, cleaning), working on water and sanitation projects, clearing paths, environmental projects (e.g. building energy efficient stoves in communities), agricultural volunteers
Working with children	<ul style="list-style-type: none"> Education (math, English, arts), work at orphanages, coaching sports, working with special needs or underprivileged people
Special interests	<ul style="list-style-type: none"> Healthcare (e.g. professionals and students who want to participate in medical services, physiotherapy, dental, volunteer, nursing, hospitals and clinics, HIV / AIDS projects) Arts (e.g. artistic training or handicraft exchange) Social outreach (e.g. working with groups that empower women, working with the elderly, special needs adults) Education (adult education, teaching English, IT, professional development, technical assistance) Science and research (opportunities for volunteers to work directly with scientists and researchers rather than tour guides)

Source: CREST, 2009.

3.5.2 Consumer profile

Below is a general consumer profile of the Volunteer and Educational tourist, in addition to what was previously described in Section 3.

Table 19 : Consumer Profile: Volunteer and Educational Tourism

Key Points	Consumer Profile -> Volunteer and Educational Tourists
Motivations	<p><i>Volunteer-focused tourist</i></p> <ul style="list-style-type: none"> ● Volunteerism is primary focus. ● Desire to help people, environment, development (e.g. monetary and / or service). ● Interest in gaining practical work experience, school credit. ● Learning, hands-on practical approach. ● Authenticity. Cultural exchange, build relationships with local people and other volunteers. ● Self-actualization through helping others or protection of the environment. <p><i>Voluntourism</i></p> <ul style="list-style-type: none"> ● Motivated by desire for a holiday but wants to help local destinations through volunteer elements within a trip. ● Self-actualization; feel good by giving back. ● Authenticity. Cultural exchange. <p><i>Educational tourist</i></p> <ul style="list-style-type: none"> ● Learning. Gaining practical work experience, school credit. ● Team building, camaraderie with fellow students / co-workers. ● Desire to help environment / people.
Demographics/ Psychographics	<ul style="list-style-type: none"> ● Tend to be well-educated or in the process of becoming well educated. ● Tend to come from affluent backgrounds. ● Tend to have the highest social conscience amongst responsible tourists. ● All age groups, although demographic groups most prominent are: <p>d) <i>Volunteer focused tourism</i></p> <ul style="list-style-type: none"> ● Youth (aged 18-26) – particularly during the summer school holiday months (May–Aug for school credit, gain work experience) ● Young professionals looking for a career break / change ● Growing number of retirees willing to volunteer overseas. <p>e) <i>'Voluntourism'</i></p> <ul style="list-style-type: none"> ● Budget tour companies tend to have a strong youth-based clientele ● High-end 'voluntourism' includes an older age group and young professionals who are well-educated with good income.
Motivations	<p><i>Educational tourism</i></p> <ul style="list-style-type: none"> ● Youth and corporate groups. May not necessarily have high social conscience but willing to be educated on the issues while on trips. ● Some repeat educational tourists do have very high social conscience.

Key activities or interests	<ul style="list-style-type: none"> ● See Table 18 above for examples of volunteer and educational tourism interests. ● Range from short – term (e.g. painting, building) to extended trips (e.g. scientific research). ● Location can be in rural villages, natural areas, or urban centers, depending on type of volunteer or educational activity ● Work with locals ● Team building, hands-on learning through games or activities
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Source: Compiled by CREST.

3.5.3 Segment trends

The numbers of tour operators that offer volunteer vacations have increased significantly in the last twenty years,¹⁷⁶ especially, for short term volunteer holidays. Tour companies at all levels, including High-end luxury, are offering more tours that incorporate a volunteer component (voluntourism), as it adds to creating a more authentic cultural experience. This stems from the fact that people are becoming more socially and / or environmentally aware and have a desire to 'give back' during their leisure trips. WTM (2008) reported that the trend has extended even to the luxury hotel chains where programs have been developed that allow guests to volunteer at local organizations. For example, the Ritz Carlton has a program called "Give Back Getaways" where guests can volunteer at a local program, Fairmont Hotels in Canada, in partnership with Habitat for Humanity, offers guests the opportunity to help build homes, and Nurani Dunia in Jakarta gives guests the chance to prepare and distribute food among underprivileged children.¹⁷⁷

Tour companies themselves are not only offering volunteer tours, but have created entire sections or divisions of their business in order to tap into the volunteer travel market and offer, in some cases, both volunteer-focused trips and vacation-focused voluntourism. This particular trend is driven by the continuing popularity for gap year breaks among students and the growing number of people who are taking career breaks. Travel companies are beginning to partner with international and local NGOs to provide volunteer activities. For example, Intrepid, an Australian based tour company, has over thirty different volunteer focused holidays, several of which are joint ventures with Make A Difference (MAD) that specializes in working with community-owned and led projects.¹⁷⁸ Within the Gapforce group, based in London, U.K., two divisions specialize in volunteer activities: Greenforce, their non-profit division focuses on gap year and career break volunteer expeditions, and Medforce, their newly created segment that specifically focuses on overseas medical placements.¹⁷⁹

Members of Generation Y (born after 1982), having more disposable income than in the past, an increasing awareness of the 'global village', and high social conscience, are travelling more frequently. Practical field experience overseas among students and recent graduates is also increasingly recognized as valuable work experience and a resume builder. Many students in the sciences, international development, or other academic fields want to experience first-hand the issues that they have studied. In addition, because many volunteer programs offer the opportunity to gain school credit through internships, students are a key market for volunteer tourism. Given the current economic recession and the challenges of finding employment, this group is likely to continue to participate in volunteer experiences overseas. Travel organizations note as well that there are an increasing number of professionals on career breaks or sabbaticals who want to participate in volunteer tourism. Many volunteer-focused organizations are developing programs for qualified professionals in specific sectors such as healthcare, IT, or teaching.

For those who may only have a short period of time for holiday but want volunteer-focused trips, many organizations are offering shorter opportunities (e.g. 7 days, and even weekends). These shorter volunteer opportunities are also appealing to business travelers as well. Many companies are encouraging their employees to participate in volunteer activities near their international offices as part of their CSR strategy. In addition, travel companies are offering team building trips overseas that often incorporate a volunteer focus. For example, Global Vision International, a U.S. based volunteer travel company, has partnered with Whole Foods Market, a Fortune 500 company, to create an international volunteer program for employees.¹⁸⁰

Lastly, there is a growing trend for travel organizations to offer family volunteer vacations. These experiences are viewed as rewarding opportunities to strengthen family bonds while also providing children the opportunity to learn about and experience a different culture.

3.5.4 Position in the market, promotional strategies and price

There are many organizations that offer volunteer tourism both from non-profit organizations and for-profit tour operators. The type of volunteer opportunities available tends to be aligned with the organizations' respective missions or mandates.¹⁸¹ For example, the Earthwatch Institute has a mission to engage people in scientific field research and education to promote a sustainable environment¹⁸². They offer trips that allow volunteers to participate in research alongside scientists all over the world. Cross-Cultural Solutions (CCS), another non-profit organization, with a mission promote understanding of difference cultures, operates volunteer programs in partnership with sustainable community initiatives¹⁸³. Both non-profit organizations and tour companies specializing in volunteer programs typically promote them not as 'tours,' 'travel,' or 'vacations,' but as 'opportunities,' 'expeditions,' and 'experiences,' using qualifiers such as 'rewarding,' 'life changing' and 'make a difference.' Other travel companies describe their products as 'meaningful vacation' and 'travel with a purpose'. Volunteer-focused organizations tend to position themselves as experienced experts and they may offer educational opportunities such as internships or student fellowships, and / or group expeditions such as school field trips, corporate travel, or family travel. The expeditions are focused on learning and practical participation in activities. In addition, volunteer-focused organizations may market to professionals who can use their skills in developing countries or try something different while in between careers. As one expert noted, "This is an opportunity for them to get their foot in the water." The promotion is focused less on a vacation and more focused on learning and making a meaningful contribution. The cost of volunteer-focused vacations varies greatly, and the length of the trips ranges from a few days to 16 or more weeks. For longer expeditions, the initial 2-3 weeks may be priced higher, with subsequent weeks cheaper. In contrast, voluntourism companies, may provide family or group expeditions, but very rarely position themselves as an educational tourism provider; the emphasis remains with the holiday experience. They are priced in line with other similar trips in the adventure, culture, and nature-based market segments. In some cases, tourists may have to pay additional fees to participate in the volunteer activities, and volunteers themselves often chose to donate to the projects they have participated in or seen first-hand.

Promotional images

The advertising copy for Volunteer and Educational Travel uses images that convey the idea that the visitor is an interactive contributor to the local community. These include photos of volunteers teaching, building holding injured animals, banding turtles, etc. Websites and literature describe travelers as having experiences that "immerse" them in the local culture and give them opportunities to "work side-by-side with indigenous families." Also promoted is the positive interaction and camaraderie among the volunteers. Intrepid Travel features a group of smiling volunteers on the "Intrepid Volunteering" webpage.¹⁸⁴

Table 20 : Examples of Promotional Imagery used in Volunteer and Educational Tourism

Educational and Volunteer Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
 <p>Cross-Cultural Solutions (U.S., U.K., Canada)</p>	<p>www.crossculturalsolutions.org</p>	<p>People volunteering and participating in activities. Some natives/locals.</p>	<p>"most diverse and historically rich," "diverse population," "many cultural learning opportunities," "discover the charm and beauty"</p>
 <p>Global Vision (U.S.)</p>	<p>www.gviusa.com</p>	<p>Locals & people volunteering. Some natural landscapes.</p>	<p>"working side-by-side with indigenous families," "one of the jewels of Central America," "enriching cultural experience," "being immersed in the culture," "amazing community interaction"</p>
 <p>GreenForce (U.K.)</p>	<p>www.greenforce.org</p>	<p>Locals & people volunteering.</p>	<p>"most biologically diverse areas," "The possibilities are endless," "experience the indigenous cultures," "you'll feel more alive," "immerse yourself," "bask in the wonderful culture," "The opportunity of a life time to do what you love doing"</p>
 <p>i-to-i (U.K., U.S., Ireland, Australia)</p>	<p>www.i-to-i.com</p>	<p>Locals & people volunteering.</p>	<p>"immensely fulfilling," "protect this fragile natural habitat," "incredible natural landscapes," "protect the rich biodiversity," "become involved in all aspects of local life in and out of the school," "unique setting"</p>

Additional Examples of Imagery Used



Source: Compiled by CREST, 2009

3.5.5 Current marketing and distribution channels

The marketing channels vary between the volunteer focused and voluntourism trips. Voluntourism companies use many of the same marketing and distribution channels as conventional tourism. Volunteer focused travel, on the other hand, is more reliant on word of mouth. Media coverage is particularly helpful in promoting non-profit volunteer organizations. Those companies that have a strong focus toward the gap year or student market also use direct marketing on school campuses. This is much more common in Europe as gap year excursions are very popular among youth and travel distances between universities is relatively short compared to North America. The Internet and online social networking sites are increasingly important. Past volunteers are able to exchange or share experiences with other volunteers and build enthusiasm among perspective volunteers.

3.5.6 Social and environmental standards applied

While most organizations have a CSR policy, ethical guidelines, or mission statement, there are no defined standards for volunteer tourism. Many volunteer organizations provide training and briefing materials to prepare the volunteers prior to their departure. Sometimes partnerships with NGOs also lead volunteer organizations or travel companies to adhere to the standards set by the NGO. However, as the field has mushroomed particularly for short-term volunteer programs, concerns are growing about the need for protocols. At the December 2008 Travelers' Philanthropy Conference in Tanzania, tour operators and representatives of community organizations, raised a number of questions about volunteer programs. In an effort to respond to these concerns, Center for Responsible Travel (CREST) published a list of "Dos and Don'ts of Travel Giving" based on interviews with experienced tour operators who run either volunteer or travelers' philanthropy programs.

Below are a few tips from the experts interviewed by CREST:

"It is important that guests who wish to make a contribution to local communities do not simply impose their own will on such communities. The community should be consulted and involved."¹⁸⁵

When visitors seek to volunteer after their vacation for a week, interviewed tour operators respond that "It cannot be stressed enough – volunteers, unless properly managed, are fundamental drivers of disempowerment of and disowning of projects by communities. All interventions should be approached with caution and respect."¹⁸⁶

When visitors want to send books to destination communities, the experts respond that "It's important to buy locally to support the local economy and get books that are appropriate."¹⁸⁷

3.6 Backpackers and Youth Tourism



3.6.1 Definitions

Youth tourism

Youth tourism is considered one of the largest and fastest growing segments of the global tourism industry, accounting for approximately 20% of international tourist arrivals.¹⁸⁸ The majority of youth travelers are students under the age of 25, but there is a category of older “youth” travelers in their early thirties, and the number of these may be expected to grow in coming years.¹⁸⁹ The UNWTO has even coined the term “flashbackers” for these older youths. In a 2008 study, UNWTO wrote that, “a new generation of “flashpackers” (older backpackers with bigger budgets) is emerging, extending the ‘youth travel’ market to 30+ years¹⁹⁰.” In addition, the traditional youth traveler segment is expected to increase with the growth in student numbers, youth affluence, and availability of long-haul destinations. Youth Tourism can include backpacking, adventure travel, language study, work exchange, and independent travel.¹⁹¹

Backpacking

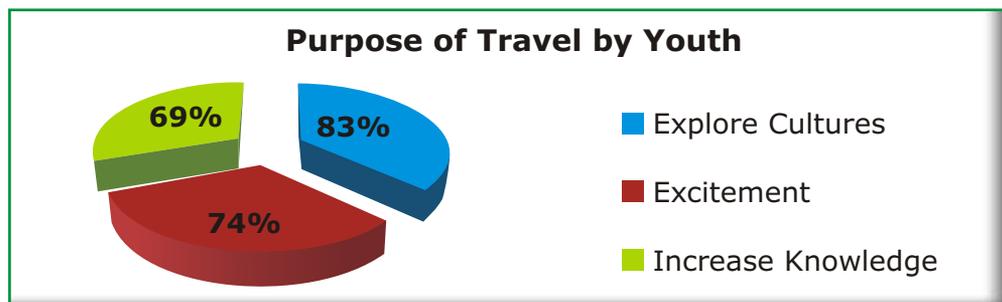
Backpacking has historically been considered a niche segment of the youth travel market. According to the UNWTO, only about one quarter of youth travelers worldwide consider themselves as backpackers.¹⁹² While often thought of as synonymous with cheap travel, backpackers in fact are a heterogeneous group of travelers with a diverse range of motivations. In addition, there is a growing number of backpackers aged 26 to 44 and a smaller group aged 45 and over.¹⁹³ Although motivations and characteristics differ among age segments, in general backpacker characteristics include: preference for budget accommodations, informal activities, flexible itinerary, self-organized, travel for leisure purposes, long-haul, multi-destination trips, and emphasis on meeting locals and other travelers.¹⁹⁴ Australian Capital Tourism sidesteps these variations in motives and activities and defines backpackers simply as: “an international visitor aged 15 years and above who spent one or more nights in a backpacker hostel/accommodation.”¹⁹⁵

3.6.2 Consumer profile

Youth Traveler Profile

In contrast to adults who travel primarily for business or leisure purposes, an overwhelming 70% of young people travel with a definitive purpose – to learn a language, volunteer, work or study abroad.¹⁹⁶ The main motivations fueling youth travel are identified as: exploring other cultures (83%), experiencing excitement (74%), and increasing knowledge (69%). Other motivations include ‘using physical skills’ and ‘challenging personal abilities’.¹⁹⁷

Figure 12 : Main Motivations to Travel by Youth Under 26 Years Old.



Source: UNWTO, *Youth Travel Matters*, 2008.

Most young travelers are under the age of 26 and have already completed a college degree or are taking a break before starting university. Young travelers typically self identify as either 'travelers' (>50%), 'backpackers' (25%) or 'tourists' (20%).¹⁹⁸

The International Student Travel Confederation (ISTC) and the Association of Leisure and Tourism Education (ATLAS) conducted an international survey on young people and students from various regions including Canada, the Czech Republic, Hong Kong, Mexico, Slovenia, South Africa, Sweden and the United Kingdom. The results of the survey indicate that youth travelers under the age of 26 place considerable emphasis on extreme adventure, social contact, and excitement. The 'mature' youth traveler (over 26 years old) seeks less extreme, more individualized experiences with a greater degree of comfort and less time-consuming modes of travel. On a whole, the entire youth travel segment is expanding in terms of demographics, frequency, and places of visitation. Youth travel is not only increasing in age range, it is also becoming less male dominated with growing numbers of female long-haul travelers. The majority of youth travelers have previous travel experience, an average of 6 trips away from the home for those under the age of 26, while youth travelers over 26 average 8 trips. The average trip includes visits to two different countries and the number of countries increases for more experienced or longer-duration travel.¹⁹⁹

According to the UNWTO, "the most popular travel destinations for youth worldwide are Australia, the United States, and France (all of which are visited by more than 10% of youth travelers)."²⁰⁰ The destinations experiencing the highest growth rates from youth travelers worldwide include South-East Asia, China, and India.

Table 21 : Countries Where Youth Travel (under age 30) Comprises More Than 25% of Total International Arrivals²⁰¹

Country	Percent
India	38
New Zealand	33
Mauritius	32
Japan	30
Republic of Korea	29
Honduras	27
Anguilla	27
Nepal	23

Source: UNWTO, Youth Travel Matters, 2008.

For youth travelers originating in the United States, the Student Youth Travel Association (SYTA) provides a more detailed Destination "Hot List" for Young Travelers. The May 2008 "Hot List" identifies the top 10 destinations in the United States, Canada, Mexico and internationally for young U.S. travelers.

Table 22 : Top Destinations for U.S. Youth

Top 10 U.S. Destinations	Top Destinations in Canada & Mexico	Top 10 International Destinations
1. New York	1. Toronto	1. United Kingdom
2. Washington D.C.	2. Montreal	2. France
3. Florida	3. Quebec City	3. Italy
4. Massachusetts	4. Vancouver	4. Spain
5. Virginia	5. Cancun & the Yucatan	5. Australia
6. California	6. Calgary	6. Germany
7. Pennsylvania	7. Edmonton	7. Greece
8. New Jersey	8. Ottawa	8. Brazil
9. Illinois	9. Oaxaca	9. Peru
10. Maryland	10. Mexico City	10. China

Source: SYTA, 2008²⁰²

Backpacker Profile

Backpacking has reflected a long-standing activity of low-budget, independent travel among young people. Now, the segment has transformed, showing a mix of ages, demographics, and motivations. However, a general and central component of self-identification amongst all backpackers is the common principal of using non-institutionalized forms of transport and accommodation. Backpackers typically stay in youth hostels, campsites, with families and friends, inexpensive B&Bs, or community-based guest houses. Within and between host destinations, they travel by bus, rail, bike, or on foot more than by plane or rental car.²⁰³

Studies and surveys of backpackers indicate that they travel for a range of reasons. Young backpackers (under age 30) are often classified based according to three main types of motivation - "self-developers", "new experience seekers and "travel generalists."²⁰⁴ The following highlights the key aspects of these youth backpacker segments:

- *Self-developers* – importance on personal growth, learning, experiencing, escape and excitement. This segment has the longest length of stay, are more likely to work, and place greater importance on natural attractions and scenery. Travel is viewed as a means for personal growth and understanding.
- *New experience seekers* – emphasis on learning, experiencing, escape and excitement (not on self-development). This segment has the shortest length of stay, is slightly older than the other segments, and the travel experience is the sole purpose.
- *Travel generalists* – includes all motives from the other categories, but places greater importance on visiting friends and family and nightlife activities. This segment is more concerned with the cost, distance, and travel options to destinations. Additionally, generalists are more influenced by the opinion of others.

Table 23 : Differences Across Youth Backpacker Segments by Origin (in percentages)

Origin	Self-Developers	New Experience Seekers	Travel Generalists
Europe	72.2	71.3	64.4
North America	11.6	12.4	8.9
Other	16.2	16.1	29.3
Average Age	24.4	26.8	24.1
Male	45.6	59.0	56.0
Female	54.4	41.0	44.0

Source: Murphy, 2000

3.6.3 Segment trends

Young travelers develop their own style and identify themselves apart from mainstream tourism. Only 23% categorize themselves as 'tourists' and, in 2007, over 46% visited destinations outside of major gateway cities. Youth are also more apt to be philanthropic travelers; the number of youths helping to support local projects or people jumped from 27% in 2002 to 42% in 2007.²⁰⁵

Young travelers have proven resilient and undeterred by negative events like terrorism, natural disasters and epidemics, with only 3% delaying travel on account of these issues.²⁰⁶

In general, backpackers from both youth and older sub segments spend less per day, but stay longer, and may spend more overall than other travel segments. They also tend to make most of their vacation purchases in host communities, and so they help to reduce economic leakage that is typically higher in conventional forms of tourism. Backpackers of all ages now travel with laptops, credit cards, and cell phones. They expect the latest in communications, facilities, and entertainment and better standards in cleanliness, customer service, and security. The primary difference between female and male backpackers of any age is female concerns for safety and specially designated dorms and washrooms.²⁰⁷

In general, youth travelers and backpackers exhibit unique characteristics that differentiate them from other sections. Youth travelers and backpackers under the age of 29 possess similar characteristics and behaviors, so that the following 'Youth Travel' statistics can apply to both categories:

Youth Travelers and Backpackers (aged 15-29) - Current Condition

Traveler numbers: Youth travel accounts for over 20% of international tourist arrivals, or approximately 160 million tourist arrivals annually.²⁰⁸

Expenditure: The 'budget traveler' image is no longer the applicable norm for young travelers. On average, youth travelers and backpackers have longer trip durations thus spending more than the average tourist. The average trip expenditure increased by nearly 40% between 2002 and 2007. Overall, the youth travel industry is worth an estimated U.S. \$136 billion per annum. This constitutes 18% of worldwide international receipts.²⁰⁹

Youth Travelers and Backpackers (aged 15-29) - Future Growth

Growth: The youth market is one of the fastest growing tourism segments, with numbers increasing at 3-5% and sometimes as high as 8% annually. Youth overnight stays are expected to rise to 500 million by 2020 from the current 300 million overnight annual stays.²¹⁰

Trip frequency: The average number of trips taken annually by youth travelers has increased from 6.2 in 2002 to 7.3 in 2007 (including both short and long trips). Additionally, about 95% of young travelers state that their prior travel experiences has led them to strive to travel more in the future.²¹¹

Expenditure: "The total average expenditure of youth travelers worldwide has increased 39% between 2002 and 2007," with each traveler spending U.S. \$2600, of which \$1550 was in the destination.²¹²

As long-haul travel by youth increases, this market will comprise more of the mainstream market. Half of former backpackers from Australia have taken a return trip to a long-haul destination with spending increasing on each visit.²¹³

Youth travelers aged 15-29 years comprise between one-fifth and one quarter of total outbound travel from Germany, U.K., France, Italy and Holland.²¹⁴ During the 1990s, the youth backpacker segment in Canada increased by 20-25% each year with an average spending of Canadian \$3,336 per trip.²¹⁵

Contemporary ("older") backpackers

Growth: As today's Baby Boomers age, they may not be able to finance their travel as easily as in the past and may shift from mid-range travel to backpacking.²¹⁶

Table 24 : Difference Between Backpackers by Age Group

Youth Backpackers (aged 15-29)	Contemporary/Older Backpackers (aged 30 and over)
<ul style="list-style-type: none"> ● broaden knowledge ● gain independence ● meet other backpackers ● backpacking as source of excitement increases with the decrease in age 	<ul style="list-style-type: none"> ● value different room types (including private rooms) ● willing to pay more to meet their needs ● budgets and length of stay increases with age

Source: Hecht and Martin, 2006

3.6.4 Position in the market, promotional strategies and price

The Backpacker and Youth Travel segment is growing due to numerous factors including increased participation in higher education, increased travel budgets (savings, parental contributions, combining work and travel), and, most recently in the U.S., the Obama administration's rejuvenated spirit of volunteerism and international engagement. This is rapidly expanding youth study and volunteer abroad programs, such as the Peace Corps, which has demonstrated a 40% increase in requests for applications and 16% increase in completed applications in 2009 from the year prior.²¹⁷ In addition to these changes, other supply-related factors that have stimulated youth travel including increases in budget airlines, growth of long-distance coach travel targeted at youth, shorter employment contracts leading to greater unemployment, increasing popularity of gap year traveling, increase in specialized student and independent travel suppliers, global rise of an Internet culture which opens information channels for new and lesser-known destinations, and larger number of independent travel guidebooks.²¹⁸ Some specific factors influencing backpacker and youth travelers are:

Information services and web portals: Young travelers and backpackers are considered among the most Internet and technological savvy. The vast majority (80%) uses the Internet for pre-trip information, and online bookings have quadrupled over the past five years. The number of youth using new technologies to keep in touch with family and friends at home has grown significantly during this same period.²¹⁹

Tours and discount programs: Nearly all youth (94%) list price as the most important factor in determining their travel plans. Discount cards are widely marketed to youth, and 92% say they are aware of the most popular of these, the International Student Identity Card (ISIC). Additionally, about 50% of all youth travelers utilize specialist youth travel agencies for their discounts and information. Suppliers are packaging transportation options that provide complete experiences and comprehensive routing options. Numerous operators offer travel networks to 'get off the beaten track', get closer to the local communities, see attractions and get better value for money spent. Examples of tour operators providing these experiences are: Oz Experience, provides hop-on-hop-off bus tours in Australia; Contiki, provides trips for 18-35 year olds to Europe, North America, Asia, Russia, New Zealand and Australia; and Stray Travel, that provides bus tours in New Zealand.²²⁰

Accommodations: Hostels remain the primary youth-oriented accommodation, taking 60% of the market share in 2007 – up from 50% in 2002. Investing in capacity and facility improvements has been reported by 50% of youth accommodation suppliers.²²¹

Obtaining Visas: Because of the recognized value youth travel segment many countries have eased visa restrictions on working holidays. Both Australia and New Zealand have lessened visa restrictions, and this has helped make these countries the most popular destinations for gap year Students. Other countries that have comprehensive policies for youth tourism and easing visa restrictions are India, Hungary, China, Philippines, and the United Kingdom.²²²

Customized package tours: According to the Student and Youth Travel Association (SYTA), the most popular customized U.S. youth tours include educational, music/performance, sports & leisure, summer/teen, language, and high school graduation travel.²²³ The range of language tour products is increasing due to demand from young student travelers. Currently, the primary markets for language learning is Japan, followed by Spain and Germany. The top language travel destination remains the U.K., with emerging destinations such as Australia and China. Volunteer youth travel is also a specialized sub-segment that includes experiences such as language teaching, conservation, and healthcare projects. These professional-development products are targeted to the gap-year market, with the United Kingdom rapidly growing in this sector exemplified by a top tour operator, i-to-i Travel (a volunteer youth travel company).²²⁴ Backpacker hostels worldwide are now offering package deals that include accommodation, transportation, Internet, continental breakfast, passes to local attractions, and other hostel amenities.

Contemporary backpackers require higher standards in accommodations. To meet this demand, a new trend in hostels worldwide is upgrading the bunk-bed dormitories and creating innovative concepts to attract the 'flashpacker' or 'mature' youth traveler market. Hostels have increased in quality and professionalism, with many providing hotel rooms and offering social networking facilities, and addressing environmental issues.²²⁵ Accor Hotels has become the first hotel chain to strategically target this segment by developing high quality hostel accommodations known as "Base Backpackers." These hostels are located throughout Australia and New Zealand and provide "state of the art facilities, and a revolution in beds, bars and entertainment."²²⁶

Promotional images

Much of the website language used to promote youth and backpack travel appeals to those characteristics typically ascribed to the young: freedom and action. Using phrases like "heaps of adventure," "experience like no other," and "awesome prices," tour operators incorporate slang into their promotional copy to reach savvy youth shopping for the best deals. Attracting youth with trips that give them the "freedom and flexibility" to "explore" is a common approach. In contrast to other segments which feature natural and cultural landscapes or native peoples as the main focus, promotional materials for backpackers use imagery that center on the youth themselves, usually engaged in some exciting activity or social interaction.

Table 25 : Examples of Promotional Imagery Used in Backpackers and Youth Tourism

Backpacking Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
 gapyear.com (U.K.)	 www.gapyear.com	 Primarily young people doing activities. Monuments, landscapes.	  "voyage of discovery," "fun and economical," "discover Latin America," "explore the Amazon"
 GapYear365 (U.K.)	 www.gapyear365.com	 Young people doing activities. Very few of animals, landscapes, or natives.	  "Go one step further than you thought possible!" "Learn how to..." "experience like no other," "Come and join our vital work," "action-packed, once-in-a-lifetime," "protect," "conservation," "volunteer"
 Gecko's Grassroots Adventures (Australia)	 www.geckosadventures.com	 Young travelers with native people. Trip descriptions tend to feature images of native people or scenery.	 "awesome prices," "loads of fun," "plenty of free time," "experience the diverse nature of this ancient land," "freedom and flexibility of traveling on your own," "the value and freedom of backpacking," "off the beaten track," "heaps of adventure," "'real' experiences"

Source: Compiled by CREST, 2009.

3.6.5 Current marketing and distribution channels

Youth travelers and backpackers use similar distribution channels when planning their trips. In 2007, approximately 80% of young travelers utilized the Internet as their main information source, followed by 'family and friends' (70%), tourist offices/websites (54%), travel agencies (42%), and guidebooks (36%). Youth backpackers use similar information sources, with the Internet (85%), family and friends (69%), and guidebooks (56%) being the top three.²²⁷

The following table demonstrates the changing trends by youth and backpackers in utilizing different information sources during the pre-trip stage. Most significantly, Internet usage jumped from one of the lowest ranking sources prior to the year 2000 to the top information source in 2007.

Table 26 : Information Sources used in Pre-Trip Planning Stage by International Backpackers in 2007

Information Source	Estimated Percentage used by Backpackers
Internet	85
Friends and relatives	69
Travel agents	43
Tour operator brochures/website	31
Travel guidebooks	57
Tourist information/website	55
Previous visit	31
Product suppliers (airlines, hostels, hotels, language schools)	26
Embassy/consulate	18
Newspaper/magazines	16
TV/radio	6
Exhibition/trade shows	6

Source: UNWTO, *Youth Travel Matters, 2008*

The distribution channels used by youth travelers and backpackers during the booking stage are rapidly changing with the development of new technologies. Although using the Internet for information purposes during the pre-trip stage has only grown 10% in the last five years, bookings have increased significantly at 40% over the same time period (from 10% in 2002 to 50% in 2007).²²⁸ Online bookings remain the primary mode for booking all travel components including air travel, ground transportation, accommodation, language courses, tours, insurance, work, study and volunteer abroad programs. The secondary booking channel is a travel agency and third by phone or fax.²²⁹

The most common marketing channels for targeting youth travelers and backpackers include industry promotions; television, print and electronic advertising; public relations and information programs; and other avenues listed in the general overview of Section 3. It is noteworthy that marketing channels for youth and backpacker accommodations are rapidly merging with mainstream or more conventional marketing streams. In December 2008, Accor Hotels' Base Backpacker launched the new version of their online booking platform that is easier to use and navigate.²³⁰ This has proved important, especially during the current economic climate, where budget travel and online bookings are the main channels for the Internet savvy traveler.

In addition, the growing network of suppliers such as guesthouses, hostels, and budget travel agencies now appeal to this segment of adventure-seeker retirees. For instance, Lonely Planet, long considered the most popular guidebook targeting youth and backpackers, has created an "Older Travelers" chat room on their online Thorn Tree Travel Forum to provide a forum for this segment to exchange ideas and resources.²³¹

3.6.6 Social and environmental standards applied

Responsible Tourism elements in Youth and Backpacker Travel

Recent surveys indicate that travel experiences are influencing attitudes and lifestyles for youth travelers and backpackers and increasing their interest in responsible travel. For example in 2008, "over 80% of young travelers report that their trip has changed their overall lifestyle in some way, and the majority said that they were travelling in a more responsible manner and thinking more about issues such as social justice, poverty and the environment."²³² However, the sustainable travel industry has also shown that environmental awareness does not always lead to 'green' behavior and purchasing. Similar to the situation in other 'green' industries, the challenge is converting 'green supporters' into 'green consumers'. As mentioned in an Australian analysis of international backpackers, "a stated willingness to pay for an ecotour does not necessarily lead to actual purchasing behavior."²³³ Therefore, efforts must come from both travel providers and travelers to create tangible 'action' that will contribute to responsible travel habits and sustainable tourism practices.

3.7 Adventure Tourism



3.7.1 Definitions

According to the definitions in the Typology of Terms in Section 1, Adventure Tourism is defined as:

"A form of nature – based tourism that incorporates an element of risk, higher levels of physical exertion, and often the need for specialized skill."

The Adventure Travel Trade Association (ATTA)²³⁴ provides a wider definition of adventure travel:

"Any tourist activity including two of the following three components: a physical activity, a cultural exchange or interaction, and engagement with nature."

ATTA's three components of adventure travel result in a broader definition that includes a wide variety of travelers and types of activities and an overlap with other product segments. According to information available from market reports and interviews with adventure tour operators in North America and Europe, the ATTA definition of adventure tourism is generally accepted and utilized. 'Outdoor tourism' is another term often used interchangeably with 'adventure tourism.' Because there are many activities included in the 'adventure' classification, they are often combined with other sectors to provide multi-segmented tourism packages (i.e. youth backpacking adventures or luxury camping).

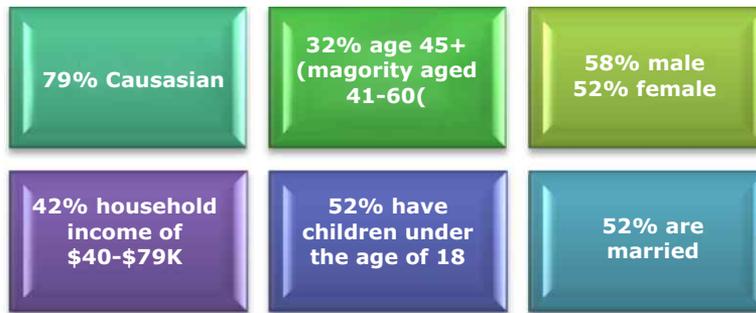
In terms of this study, the most important component is that adventure travel includes physical activity. Most often this takes place in natural settings, but it could also incorporate cultural exchanges.

3.7.2 Consumer profiles

General Adventure Traveler Profile

The majority of international adventure travelers are from North America (Canada and United States) and Europe.²³⁵ In recent years, the profile of adventure travelers has shifted and now varies demographically. More information is available about U.S. adventure travelers than any other outbound market. According to statistics from the 2005 Outdoor Industry Association (OIA) Survey²³⁶ and the 2008 CBI Product Survey,²³⁷ the adventure traveler fits the demographic profile in Figure 13.

Figure 13: Adventure Traveler Demographic Profile.



Source: Sawarbrooke, 2003.

U.S. Adventure Traveler Profile

Adventure travel products hold great potential to attract U.S. participants. Currently, over 160 million U.S. citizens aged 16 and older participate in outdoor/adventure activities. In 2005, 59.5 million U.S. citizens took a vacation specifically for outdoor adventure purposes.

Table 27: The Top 5 Adventure Activities by U.S. Tourists in 2005

Activity	Participation
Bicycling	38.2%
Fishing	34.5%
Hiking	34.2%
Camping	30.4%
Trail Running	18.0%

Source: OIA, 2006

Table 28: Total Outings (in millions) by Activity for American's Aged 16 and Older (2000-2005)

Activity	2000	2001	2002	2003	2004	2005
Backpacking	69	126	85	55	67	81
Bicycling (all types)	4097	4949	4486	3825	3885	3123
Bird watching	N/A	569	639	338	165	188
Camping (all types)	357	388	447	400	349	347
Climbing (incl. rock, ice and artificial wall)	N/A	96	147	82	68	51
Cross-Country/Nordic Skiing	30	62	82	38	58	50
Fishing (any type)	N/A	N/A	N/A	N/A	1388	1082
Hiking	870	910	877	788	827	844
Paddle sports (canoeing, rafting, kayaking)	N/A	316	324	193	235	191
Snowshoeing	36	49	23	18	29	22
Telemark Skiing	19	24	22	21	11	17
Trail Running	939	1406	1290	1059	1189	1333
TOTAL ACTIVITIES	6532	9067	8570	6970	8271	7329

Source: OIA, 2006

Categories of American adventure travelers that are exhibiting various changes are young adults (ages 16 to 24), women, and Baby Boomers. The following outlines a brief overview of the changes pertaining to these target segments.

Young adults – Ages 16 to 24 years

Young adults ages 16 to 24 remain a large portion of U.S. adventure enthusiasts. In 2005, 86.5% of young adult U.S. citizens in this age group participated in outdoor adventure activities. A growing segment of the young adult market is males who, according to the OIA 2005 study,²³⁸ comprise a significant portion of the American adventure traveler market.

Female Participants

Female adventure travelers continue to represent a significant segment of the U.S. market. In 2005, females age 16 and older that participated in outdoor/adventure activities constituted 64.2% of U.S. adventure travelers. Females age 45 and over represent the largest portion of the market at 34%, with the 16 to 24 age group representing the least at 21%. Furthermore, the percentage of married female adventure travelers increased from 52% in 2003, to 57% in 2005.²³⁹

Table 29: Percentage of Female American Adventure Travelers by Age Group

Age	Percent
16-24	21
45+	34

Source: OIA, 2006

Since 1998, female participation in adventure activities has fluctuated. For example, in 2004-2005 female participation in fly-fishing declined while kayaking and snowshoeing increased significantly. The most recent statistics indicate a decrease in overall adventure activities by female participants from 38.3 million in 2004 to 28.4 million in 2005. This may be due to a shift in female participation from adventure activities to fitness exercises like yoga and walking which grew by 10% from 2001 to 2005.²⁴⁰

Baby Boomers as Adventure Travelers

Approximately seventy-eight million U.S. citizens are classified as Baby Boomers and by 2011, this generation will comprise 25% of the total U.S. population.²⁴¹ The Baby Boomer generation (or those currently over the age of 45) constitutes about one-third of the U.S. adventure travel market with 55% of Baby Boomers considering themselves 'adventurous'.²⁴²

A study conducted by the American Association of Retired Persons (AARP) in 2005 provides valuable insight on booking methods, spending, trip duration, preferred destinations, and adventure activities by the U.S. Baby Boomer market.²⁴³ Below are some tables drawn from the AARP study:

Table 30: Duration of Stay by American Baby Boomer Adventure Travel Market

Duration	Percent
1 week or more	52
2 weeks or more	23
8-13 nights	17
Less than 4 nights	21

Source: Davies, Travel & Adventure Report, 2005

Table 31: Choice of Travel Companion by U.S. Baby Boomer Adventure Travelers

Travel companion	Percent
Spouse	57
Friends or companions	36
Children or grandchildren	29
Alone	9
Parents	8
Pet	4

Source: Davies, Travel & Adventure Report, 2005

Table 32: Adventure Travel Expenditures by U.S. Baby Boomers in 2005

Amount	Percent
<\$500	26
\$500 - \$3,000	52
\$3,000 - \$10,000	20
>\$10,000	2

Source: Davies, Travel & Adventure Report, 2005

The following tables from the AARP study summarize preferences of destinations and activities by the American Baby Boomer market. This segment will continue to increase in value for the adventure travel industry.

Table 33: Top Adventure Travel Destinations by American Baby Boomers in 2005

Country/Region	U.S.
Europe	Las Vegas
Mexico	Florida
Caribbean	New York
Canada	Hawaii
	Colorado

Source: Davies, Travel & Adventure Report, 2005

Table 34: Top 5 Dream Destinations for Adventurous Baby Boomers

1. United States
2. Europe
3. Caribbean
4. Australia/New Zealand
5. Africa

Source: Davies, Travel & Adventure Report, 2005

Table 35: The Top 10 Adventure Activities by American Baby Boomers

1. Hiking/backpacking/rock and mountain climbing
2. Escorted or guided tour
3. Snorkeling
4. Camping (tent)
5. Fresh or saltwater fishing
6. Horseback riding and biking (tied)
7. Whitewater rafting/kayaking
8. Sailing
9. RV camping
10. Scuba diving

Source: Davies, Travel & Adventure Report, 2005

European Adventure Traveler Profile

In general, European adventure travelers are aged between 41 and 60, married and have children under 18 years of age. 52% of adventure travelers are women. The following information came from interviews conducted with various European tour operators for a 2008 CBI report.²⁴⁴

British Adventure Traveler

Demographics: travel alone, in couples or with friends; typically aged 30 to 55, have high level of education and above average income, typically do not have children or are empty nesters but there is a growing interest in family packages that include children

Popular destinations: India, Thailand, Malaysia

Top activities: Cycling (2.25 million in 2006), walking, skiing, trekking and rafting.

Dutch Adventure Traveler

Demographics: typically couples ages 35 to 55, high level of education and above average income, growing interest in family packages that include children and grandparents

Popular destinations: Southern Africa, Costa Rica, Thailand, Antarctica, Chile, Iran, Nepal, Cuba, Indonesia, Malaysia, Ecuador and Argentina (Patagonia)

Top activities: trekking, mountain biking, rafting, safaris

French Adventure Traveler

Demographics: typically men and women ages 40 to 65, enjoy group travel, increase in family packages (parents with 2 children older than 8 years)

Popular destinations: China, Japan, Brazil, Tanzania, Indonesia, Turkey

Top activities: preferred activities depend on destination (such as dog sledding) but many French travelers enjoy hiking and kayaking

German Adventure Traveler

Demographics: both men and women ages 35 to 65, higher than average income, increasing number of retirees, a mixture of travelers (travel alone, couples or in groups)

Popular destinations: Brazil, India, China, Ecuador, Peru, South Africa

Top activities: hiking, kayaking, wildlife viewing

Spanish Adventure Traveler

Demographics: in general ages 30 to 60, few families, diverse backgrounds (single, married, all ages, etc.)

Popular destinations: Chile, Argentina (Patagonia), Peru, Nepal

Top activities: trekking

Swedish Adventure Traveler

Demographics: ages 25 to 40, higher level of income, increasing interest among retirees, few families (they prefer beach holidays), easy access to destination country is important

Popular destinations: Thailand

Top activities: surfing, rafting, trekking, skiing

3.7.3 Segment trends

According to recent outdoor/adventure reports from Europe and North America, the following statistics provide insight on the scale of the current adventure travel market.²⁴⁵

- Outdoor tourism (primarily adventure) comprises at least one-fifth of the global tourism industry.
- In 2000, the international adventure tourism market represented approximately 7% of all international trips, totaling an estimated 4 to 5 million trips
- According to a survey by the Adventure Tourism Travel Association, "adventure travel is the fastest growing segment of the tourism industry and approximately 69% of survey respondents in 2006 planned on taking an adventure holiday."
- South America currently ranks highest as an international adventure destination.²⁴⁶

External Trends

The effects of global climate change on local weather can significantly affect the participation and frequency of adventure activities, and can have either positive or negative impacts. For example, abundant snow conditions in the winter season can provide ample water for kayaking but unfavorable run-off conditions for fly-fishing. This occurrence was noted in the United States in 2005, when sit-on-top kayaking increased 22.4% from 2004 and fly-fishing declined by 19.9%.²⁴⁷ In Peru, the fishing segment is negatively affected by warm (El Niño) years which can lead to floods in the coastal plains and foothill regions.²⁴⁸ Trekking in Nepal and the Andes is often affected by rain and snow storms with the peak trekking seasons occurring during times of more stable weather conditions.²⁴⁹

Economic conditions play a large role in the participation and frequency in the adventure travel market. The following examples provide an overview of the general economic categories and associated impacts on the global adventure travel industry:

Recession: In recession conditions, participants tend to focus on familiar activities closer to home.²⁵⁰ According to the U.K.-based company KE Adventure Travel, exchange rates and devaluation of the U.S. dollar are having the strongest negative effects on their profit margin.²⁵¹ Iceland's tourism industry, which is largely adventure-based, is offering unprecedented discounts to boost the economy in response to the country's recent financial collapse.²⁵² On the other hand, some operators suggest that adventure travelers are dedicated to their lifestyle and will be less likely to forgo adventure trips during hard times.²⁵³

Healthy, non-peak economy: During a non-peak economy, conditions are favorable and people have disposable income and time to try new activities.

Economic "Boom": Although income levels and disposable income are highest during such times, the job demands require more hours at work and less for recreation. This trend was evident in 1998 and 1999 with the dot-com era at its peak, but the participation level at its lowest for adventure activities.²⁵⁴

3.7.4 Position in the market, promotional strategies and price

In general, the global adventure travel industry receives growth from two sources: increases in participation (both new and cross-over participants) and increases in total outings. In order to have broader appeal and increase growth, tour operators and service providers must provide activities that are easy to learn, easily accessible, done in a day, and require less specialized gear. By meeting these characteristics and adding 'new' concepts to 'old' activities, a service provider is strategically positioned to have more appeal in meeting consumer demand.²⁵⁵

United States

The adventure travel industry as a whole has remained profitable in outdoor industry sales. In the United States for example, despite the recession that started in late 2007, by November 2008 total sales volume increased by 9.6% surpassing conventional retail markets.²⁵⁶ In spite of the economic recession, the overall success of the outdoor industry is due to the appeal as a convenient and affordable way to take outdoor vacations and escape from the pressures of daily life.

Experts recommend targeting regions from where adventure travelers originate. The U.S. outbound market originates primarily in the Western, Middle Atlantic (including New York), and South Atlantic regions.²⁵⁷ Studies found that approximately 78% of residents living in the Western region participate in outdoor activities, followed by 72% in North Central, 70% in South Central, and 69% in the Northeast regions.²⁵⁸

Europe

The adventure travel segment is a significant portion of the overall European tourism market. According to the 2001 Mintel Report, "the adventure" portion of the package in Europe accounts for 25% of total package sales. This indicates that the European adventure travel market totals about 443,000 holidays per year.²⁵⁹

Although not the primary segment, adventure travel is a growing market in the U.K. According to a 2007 survey, 7% of British respondents expressed interest in adventure activities while one of the fastest growing segments, single travelers, showed an increasing demand for adventure holidays.²⁶⁰ Due to recent exchange rate fluctuations (i.e. devaluation of the dollar) margins have been pressured, resulting in a 10% drop in prices.²⁶¹ Although not an entirely profitable scenario, U.K. operators view the current situation as difficult but will rebound without detrimental effects on businesses. British adventure travel companies market countrywide and try to reach a diverse range including women, families, school groups, empty nesters, couples without children, and travelers in professions with a reasonable amount of disposable income (i.e. teachers, doctors).²⁶²

Germany is the largest outbound market for all long haul tourism sectors. In 2005, 14% of all international trips - more than 79 million - derived from the German market. Adventure travel holidays are a major and growing area of interest for German travelers.²⁶³ According to German-based adventure tour operators Hauser ExKursionen and World Wide Active, the average price of trips (excluding airfare) is €1000- €2500. Both operators feel word-of-mouth is the most efficient and commonly used strategy for marketing this segment (70% of Hauser ExKursionen's business is derived from word-of-mouth). Germans particularly enjoy 'soft adventure' travel that gets them active and outdoors, but doesn't require sacrificing the comforts of good food and plush accommodation. Brazil, Ecuador and Peru are the three most popular long-haul destinations for German adventure travelers. The geographic regions of German clients who visit Central and South American destinations originate from the south (i.e. Bavaria) at 40-45% and from the north (i.e. Hamburg or Colon) at 35%.²⁶⁴

Promotional Images

Although all sustainable tourism operators are putting a greater emphasis on active participation versus passive consumption on the part of the traveler, appeals to the adventure travel segment are decidedly more focused on a high level of activity. These trips are not only for travelers who desire to be active on vacation, but for those who seek a true challenge and have the necessary skills. Advertising copy from adventure tour operators' websites includes terms such as "will power," "conquer," and "pioneering." Landscapes are described as "epic," "tough but rewarding," and even "hostile." The imagery used presents travelers in the act of overcoming physical terrain or relishing in extraordinary views that serve as their reward for physical exertion.

Table 36 : Examples of Promotional Imagery Used in Adventure Tourism

Adventure Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
			
Adventure Alternative (Ireland)	www.adventurealternative.com	Travelers partaking in active recreation	"a pilgrimage," "with only the elements, the mountains and the quiet character of the people to accompany you," "some of the highest and most spectacular mountains"
			
OARS (U.S.)	www.oars.com	Travelers partaking in active recreation	"epic," "ground breaking," "once-in-a-lifetime adventure," "in-depth exploration," "a journey of discovery and exploration"
			
Exodus (U.K.)	www.exodus.co.uk	Travelers partaking in active recreation	"tough but rewarding," "strong lungs and plenty of willpower," "conquer some of the worlds highest peaks or most hostile environments"
			
KE Adventure Travel (U.S., U.K.)	www.keadventure.com	Travelers partaking in active recreation	"pioneering routes," "exciting and adventurous," climb amongst the world's highest peaks, explore untamed wilderness areas"
Additional Examples of Imagery Used			
			
Sommer Fernreisen (Germany)	Diamir (Germany)	Fox Vakanties (Netherlands)	Snow Leopard Adventures (Netherlands)

Source: Compiled by CREST, 2009.

3.7.5 Current marketing and distribution channels

In addition to the channels discussed in Section 4.2, the primary tools used to reach adventure travel consumers include the Internet, trade fairs, and cross marketing.²⁶⁵ Due to the diversity of the adventure travel market, most marketing and distribution channels are focused on a particular activity. An overview of each distribution channel is provided below.

Internet

The use of Internet portals is common with adventure travelers for trip planning and purchasing. According to the 2006 ATTA Survey,²⁶⁶ search engine optimization is the most effective way to secure new bookings, followed by word-of-mouth and repeat customers. A growing online trend is the use of web logs for customer-to-customer (C2C) travel planning. Consumers post their travel requests on web logs and receive word of mouth recommendations and consultant responses to their inquiries. In exchange for a 'fixing' fee, consumers receive solutions and customized itineraries. Travel companies are adjusting to this trend in order to meet the consumer shift towards more individualized travel requests.²⁶⁷

Trade Fairs

To expand distribution channels and connect with potential counterparts, trade fairs are important tools for adventure tour operators and suppliers. Examples include the Adventure Travel World Summit, Outdoor and Adventures Fair, and The Daily Telegraph Adventure Travel Show. Many general tourism trade fairs now include sections that focus on adventure travel, such as the German trade fair ITB Berlin and the WTM in London.

Cross Marketing

Cross marketing is a commonly used technique that links adventure travel products with other products purchased by adventure travel consumers. These connections transpire through various mediums such as magazines, websites, television, films, fashion, shops, and merchandising. Cross marketing expands the reach and scope of identifying target markets for specific adventure tour packages. Combining ads for adventure tours with the sale of sports equipment is a popular form of cross marketing.

Table 37 : Examples of Different Adventure Travel Marketing & Distribution Channels

Publications	Trade Fairs	Internet & Social Networks
United Kingdom – <i>Adventure Travel Magazine, The Sun (travel section), Wanderlust, Daily Telegraph (travel section), Vagabond</i>	DEMA Show The Outdoor Adventure and Travel Show (Canada)	X3M People – social adventure tourism network Adventure Travel Trade Association
United States - <i>Adventure Sports Online Directory, USA Today (travel section), National Geographic Adventure, Backpacker Magazine, The Compass, 21st Century Adventures</i>	Adventure Sports Fair (Brazil) Adventures in Travel Expo (United States) Adventure Travel & Backpackers Expo (Australia)	Lonely Planet's Thorn Tree Travel Forum Boots n All Travel
Germany - <i>Bild, Faz Frankfurter Allgemeine Zeitung</i>	Adventure Travel Show (U.K.)	Wild Scotland
Australia – <i>Outdoor Australia</i>		

Source: Compiled by CREST, 2009

3.7.6 Social and environmental standards applied

As with other market segments, a number of travel providers are incorporating sustainable or responsible tourism principles and practices into the framework of adventure travel. This is due in large part to the growing awareness and interest in environmental and cultural issues. According to findings of the 2006 Adventure Travel Practices and Trends Report, "46% of American adventure companies offer sustainable programs for customers."²⁶⁸ See Annex I for a partial listing of North American and European outbound adventure tour operators applying responsible practices.

Due to higher than average income and interest in sustainable and responsible travel, adventure travelers are generally willing to pay an average of 10% more to ensure their travel provider operates according to sustainable standards.²⁶⁹ However, there is a growing consensus by tour operators that an additional cost for a sustainable trip is losing appeal since the majority of adventure travelers assume that the sustainable policies are already included in the tour packages. As indicated by the German-based World Wide Active, "consumers place the responsibility with the tour operators and assume that the company is meeting environmentally and cultural responsible standards."²⁷⁰

In recent years, the number of tour operators initiating company-based sustainable standards has increased due to the demand by conscientious consumers. According to director Carles Tudorí of the Spanish adventure tour operator Viajes Responsables, "the company now implements sustainable tourism in every aspect (100%) of the business."²⁷¹ Viajes Responsables' responsible practices include: ongoing evaluation of environmental footprint of trips and services, working only with other sustainable tourism businesses, informing guests about responsible travel, donating a percentage of each reservation to projects in developing countries, and staying active in issues pertaining to international human rights and sustainable tourism. The Dutch operator Vlieg & Flets base their trips on sustainable criteria to provide clients with wonderful experiences, while helping local communities economically and environmentally.²⁷²

Although implementing sustainable standards (i.e. Global Sustainable Tourism Criteria) and certification criteria reduce environmental footprints, some up-front costs can make certification prohibitively expensive. As the director of one U.S.-Based Adventure company states, "Certification definitely helps but it is beyond the reach of many small companies in destination countries."²⁷³

Another option was recently developed that provides sustainable standards for the entire international adventure tourism industry. In October 2008, the global Adventure Tourism Development Index (ATDI) was developed by the Adventure Travel Trade Association, The George Washington University International Institute for Tourism Studies, and Xola Consulting, Inc. The ATDI "provides a new industry standard for tour operators and governments who want to develop and market sustainable adventure tourism products and services."²⁷⁴ The ATDI implements sustainable criteria in each of the steps entitled the "10 Pillars of Adventure Tourism Market Competitiveness." To date, the ATDI method has been applied in India, Peru, Mongolia and Mexico, with the resource available for any tour operator around the world.²⁷⁵

3.8 High-end Tourism



3.8.1 Definitions

High-end Tourism. For the purposes of this report, High-end Tourism refers to the luxury sector that is distinguished by price and personalized service. While many conventional High-end products are opulent in their disregard for natural resource conservation, there is a growing segment that is tapping into the conscientious yet affluent consumers concerned with responsible travel. High-end or luxury tourism connotes high quality services, accommodations, aesthetics, activities, and amenities. Increasingly, high-end travelers expect fine-dining, day spas, massages, excursions in style and in small groups (e.g. hot-air ballooning and yachting) even in remote and impoverished destinations. Customization from beginning to the end is the hallmark of luxury tourism, with tour companies, accommodations, and staff ensuring clients' needs and wants are met at all times.

High-end responsible tourism implies the same type of service and comfort but with elements of responsible travel. Once upon a time, some of the world's most prized nature destinations such as the Galapagos Islands, Nepal, game parks in East Africa, and even parts of Costa Rica, were visited only by the physically rugged and intellectually curious travelers.²⁷⁶ However, with improved air and ground transport, better accommodations, and increased publicity, these destinations are now available to the masses. Increasing numbers of older, wealthier, and "softer" travelers are opting for comfort. Today, scores of companies can be found on the Internet that offer high-priced tours but heed little if any regard to conservation or local economic development. On the other hand, responsible High-end tour companies take into consideration the environmental, cultural, social, and economic considerations of the destinations they visit, while maintaining a high standard of comfort and service.

The level and type of responsible travel varies in High-end tourism as in any other product segment. In many cases, the type of accommodation is a key determinant of High-end tourism. This might mean staying at a four-star or higher hotel, resort or eco-lodge that have environmental policies or took environmental considerations into their design and construction, and have social standards for employing local people and treating destination communities fairly and equitably. Many luxury tour companies incorporate the cost of carbon offsets for the emissions generated by the trip, and donations to local community projects and conservation organizations. These tour companies may even arrange visits to local schools, wildlife centers and hospitals, including the traditional sightseeing tours and safaris that may cost anywhere from U.S. \$300 to \$3000 a day.²⁷⁷ At such a high cost, some clients might have an expectation that their tour company will donate part of the earnings from the tour. Thus, High-end responsible tourism can also incorporate elements of philanthropy.

3.8.2 Consumer Profile

Below is a general consumer profile of the responsible High-end tourist, in addition to what was previously described in Section 3. These characteristics are similar across markets, but note that individual choices vary.

Table 38 : Consumer Profile: Cultural and Community-Based Tourism

Key Points	Consumer Profile -> High-end Tourists
Motivations	<ul style="list-style-type: none"> ● These tourists are accustomed to the highest level of comfort - accommodations, food, and transport - both at home and while traveling. ● Primarily motivated by the holiday itself. ● They are experienced travelers and are looking for more meaningful and authentic trips. ● They are philanthropists at home and want to incorporate philanthropy into their travels. They want to 'give back,' particularly in developing countries. They recognize that they are more fortunate than local peoples and are willing to pay a higher cost with the knowledge that their money will contribute to local development. ● They are self-actualized; gratified to contribute to a cause they believe in or have seen first-hand.
Demographics/ Psychographics	<ul style="list-style-type: none"> ● The most affluent of all travelers. ● Tend to be older, well educated, successful, and highly experienced travelers. ● They may have a high social conscience but tend to be the least aware of the social or environmental issues in the destination countries they visit. However, they are open to learning and will try to contribute in some way (usually monetarily).
Key activities or interests	<ul style="list-style-type: none"> ● These tourists participate in all types of activities but pay a higher cost for philanthropic purposes. ● See activities in: <ul style="list-style-type: none"> - Nature-based Tourism, Cultural Tourism, Adventure Tourism, and Volunteer Tourism (some tour operators are beginning to offer 'Luxury Voluntourism' such as Hands-Up Holidays).

Source: CREST, 2009.

3.8.3 Segment trends

'Eco-chic' luxury accommodations (boutique hotels, resorts, lodges, camps) are a growing sector of tourism. Many High-end tour operators and service providers use 'green' accommodations. They provide, as a selling point, details on how their accommodations are environmentally friendly.

As mentioned above, High-end companies practicing responsible tourism is no longer restricted to luxury accommodations and pampering. More and more companies are offering High-end, nature-based, cultural, and adventure products where guests participate in soft or rugged activities but without skimping on the service or amenities. For example, a luxury tour might include university trained nature specialists as private guides, a private charter helicopter ride to reach mountaintops to view unreachable volcanoes, or access to private art collections or cooking classes from acclaimed local chefs. Some companies are moving into and/or focusing on luxury voluntourism in which tourists are able to volunteer part of their time on holiday (e.g. Hands Up Holidays). Philanthropic minded travelers want opportunities to do charity work while on holiday, but not necessarily backbreaking labor or staying in dorm-like conditions; rather, they are wealthy vacationers who enjoy doing good works while still enjoying plush accommodations, gourmet dining, and traditional sightseeing opportunities. An additional trend (and an incentive for travelers) in philanthropic travel includes the opportunity for tax-deductible donations to non-profits.

With the rising concern of climate change, many companies in the travel industry offer opportunities for clients to offset their carbon emissions for their flight and/or tours. High-end tourism is starting to take this one step further by incorporating the cost of carbon offsets into the trips they offer and in their own operations. For example, U.K.-based Hands Up Holiday and Tribes Travel automatically offset carbon for flights for their clients' trips. Tribes Travel does this through The Tribes Foundation's (their non-profit organization) "The Travel Forest" program, in which ten trees are planted to offset carbon emissions for each traveler that flies to Tribes Travel destination countries. Other High-end companies such as U.K.-based cazenove+loyd, offset their own travel through third-party carbon offset programs such as Carbon Responsible. To take this further, some companies extend their carbon offsets to other aspects of their operations; in the U.S., Natural Habitat Adventures claims it is a 100% carbon neutral company,²⁷⁸ and Lindblad Expeditions launched a Climate Change Action Plan to lessen the company's overall environmental footprint in conjunction with Clean-Air-Cool Planet, a non-profit organization dedicated to promoting solutions to global warming.²⁷⁹

Table 39 : Examples of Responsible Environmental and Community Practices in High-end Responsible Tourism Products

Environmental Considerations	
Sustainable design	<ul style="list-style-type: none"> ● Locally sourced building materials ● Use of recycled materials ● Incorporating local landscape features
Energy efficiency	<ul style="list-style-type: none"> ● Monitor energy efficiency ● Use of solar panels ● Overall energy conservation practices ● Energy efficient water heaters ● Energy efficient appliances, light bulbs ● Optional towel and sheet changes
Water management	<ul style="list-style-type: none"> ● Water saving practices ● Use of biodegradable detergents ● Water collection method on roofs for irrigation ● Re-use of grey water ● Waste water management
Biological conservation	<ul style="list-style-type: none"> ● Erosion prevention measures ● Use of native plants for landscaping ● Maintain natural landscape
Waste management	<ul style="list-style-type: none"> ● Reduce, reuse, recycle, compost ● Minimize waste production ● Limited use of packaged materials
Community	
Supply chain management	<ul style="list-style-type: none"> ● Life-cycle analysis of products ● Donate used or excess items to local charities ● Buy organic, fair-trade, and /or sustainable items
Community relations	<ul style="list-style-type: none"> ● Employ local staff ● Buy locally sourced products and services ● Donate to local charities ● Staff encouraged and given opportunity to volunteer free time at local organizations

Source: CREST, 2009.

Travelers' philanthropy is a growing trend among tour operators because of the increased client demand for it, and as a method to improve the social and environmental responsibility profile of their company. Nearly all responsible travel companies support local projects, partner with charitable organizations, or make donations to international or local charities that support the environment and/or community development in destination countries. High-end tour companies do this as well, but are also beginning to incorporate travelers' philanthropy within their core philosophy.

American Express Publishing and Harrison Group's found that the affluent are spending less on personal items and more on the family, including travel.²⁸⁰ According to Richard Perks, Director of Retail and Financial Research at Mintel,²⁸¹ however, it is a fallacy to believe that the luxury market depends on a few super rich who are recession-proof. In good times, there are many in the upper mass markets that are able to trade up; but in a recession, these same people are cutting back like everyone else. The luxury market is therefore also likely to suffer in the current recession.

Table 40 : Examples of How Some High-end Tour Companies Support and Promote Travelers' Philanthropy.

Trends in Travelers' Philanthropy	Examples
Tour companies promoting travelers' philanthropy:	<ul style="list-style-type: none"> • Elevate Destinations and Lindblad Expeditions have travelers' philanthropy links on their websites where clients can donate to carefully selected charitable organizations or conservation trusts in destination countries.
Incorporating or dedicating funds for charitable donations within a tour: Some companies will specify the exact amount of funds dedicated to a selected charity with the purchase of a specific tour.	<ul style="list-style-type: none"> • Journey Latin America donates £200 for each person who purchases a Bolivia with a Difference tour to the charity, Que Rico!, that helps children in the burns unit of a local rehabilitation center. They also donate a portion of their earnings from their Galapagos trips to the Charles Darwin Foundation. • Hands Up Holidays, a specialist in luxury voluntourism, incorporates donations to local community development initiatives within the cost of the tour, for example travelers volunteering in building projects would have the cost of building materials incorporated in the cost of the tour package.
Tour companies partner with third-party, non-profit travelers' philanthropy programs	<ul style="list-style-type: none"> • Country Walkers, Nature Air, and a dozen other leading service providers have partnered with the Center for Responsible Travel's Travelers' Philanthropy Program (www.travelersphilanthropy.org) to allow online tax-deductible giving.
Tour companies donate percentage of net earnings to charities	<ul style="list-style-type: none"> • Many tour companies will donate a percentage (1-10%) of their net earnings to selected partner charities.

Source: Compiled by CREST, 2009.

3.8.4 Position in the market, promotional strategies and price

High-end tourism is a specialized niche market. These products are placed in the highest price bracket due to the above average expectations of the clients and the superior service offered. Many High-end tour operators claim that they do not focus on volume in this market; rather, their focus lies in quality and service. This level of service is what differentiates these High-end companies from other responsible tour operators.

Many High-end tour companies offer guided group tours with fixed departure days (e.g. luxury cruises, small group travel); however, the companies that focus on super exclusive luxury travel tend to focus on tailor-made, customized holidays for their clients. This might include private charters, flexible dates, access to private beaches, special interest trips (e.g. corporate travel, weddings, and honeymoons), and customized itineraries. These companies may also specialize in certain types of exclusive travel. For example, U.S.-based Blue Parallel launched an aerial sightseeing program for tourists after organizing logistics for a National Geographic photographer.²⁸²

Typical words used in the promotion of High-end tourism include: luxury, upscale, pampering, gourmet, personalized service, exotic, 'see the real...' but in comfort, in style, high quality, fine-dining, relax, spa treatments. In addition, companies that provide customized High-end trips also frequently use words like: tailor-made, specialized, personalized, private, custom-made, freedom, flexibility, exclusive, exotic, and remote. For travel with a philanthropic component, terms often used include: giving back, meaningful, making authentic contact, generosity, global patriot/leadership, do more, benefits.

Table 41 : Examples of Pricing for Luxury Tours

Examples of Pricing for Luxury Tours in Selected Destinations*	
Nepal	17 days Himalayan Leadership Trek to Everest, from U.S.\$6295 7 days individually designed itinerary, from £1800 14 days The Heart of Nepal, £2200 10 days Annapurna Lodge Trek, £1795 (including international flight from the U.K.) 13 days Nepal In Style, £2295 (including international flight from U.K.)
Central America	11 days honeymoon in Honduras, U.S.\$3500 7 days Belize and Guatemala, U.S. \$9000 to \$11,500 (includes use of private helicopter) 7 days Guatemala, from £2200 12 days Nicaragua, from £837 16 days Guatemala, €5950 (including international flight from the Netherlands) 14 days tailor-made Nicaragua, £3999 (including international flight from the U.K.) 8 days Nature & Culture Nicaragua, U.S.\$2199
South America	11 day Galapagos cruise, £5223 16 day Galapagos and Peru cruise, U.S. \$8160 (with flight from U.S.) 9 day trip to Peru, U.S.\$4000 10 days Amazon, Machu Picchu Adventure, from U.S.\$5595 8 days Bolivia tour, €1579 18 days Andean Explore (Bolivia, Peru, Chile) from £4395 (including international flight)

*Unless specified, all tours do not include international airfare to destination countries.

Source: Compiled by CREST, 2009.

Promotional images

High-end tour operators often include images similar to those used in other product segments, but add an additional element of exclusivity and relaxation. These images suggest that the higher price is reflected in more services (e.g. spa) and amenities (e.g. luxury accommodations), and access to activities that might be beyond the average traveler (e.g. taking small aircrafts to visit famous sites). The images also convey a personalized experience, where the traveler will be in close contact with nature and cultural experiences.

Table 42 : Examples of Promotional Imagery Used in High-End Tourism

High-end Tourism Promotion			
Company	Website	Imagery Used	Phrasing of Appeals to Consumers
 Elevate Destinations (U.S.)	 www.elevatedestinations.com	 natural and cultural landscape, rest and relaxation	 "no mere tourist experience," "responsive travel," "life-changing opportunity," "make travel matter," "restore your zest for life," "your exploration...will leave you awed and renewed by Nature's powers"
 Kuoda Tours (U.S.)	 www.inturkuoda.com	 cultural and natural landscape	 "experience the real Peru that few visitors get the chance to see," "a renewed sense of wonder at the diversity of life and culture everywhere," "become part of the ever-smaller Global Community"
 Journey Latin America (U.K.)	 www.journeylatinamerica.co.uk	 natural and cultural landscape	"no other place on earth that compares," "seclusion and tranquility," "let us show you the Latin America we know and love"
 cazenove + loyd (U.K.)	 www.cazenoveandloyd.com	landscape, rest and relaxation	"go beyond," "these regions...are challenging," "every country and every part of that country has little secrets, which only an insider can know or anticipate"

Source: Compiled by CREST, 2009.

3.8.5 Current marketing and distribution channels

More so than in other product segments, High-end travel companies are featured in popular media. Several companies have been featured repeatedly in Condé Nast Traveler (U.S.), Condé Nast Traveller (U.K.), National Geographic Traveler, Travel + Leisure, and The Travel Magazine. In addition to travel-related print and online media used in other product segments, High-end tourism is often highlighted in popular magazines, such as news (Time, Newsweek), business (Forbes), lifestyle (Town and Country, Food and Wine), high fashion (Vogue, Vanity Fair), and bridal (Modern Bride). Newspaper travel sections and in-flight magazines also feature luxury travel companies. Some magazines that specifically focus on High-end travel include Travel Connoisseur, Luxury Travel Advisor, and Luxury Travel Magazine.

Word of mouth and repeat clients represent a large portion of the luxury responsible tourism clientele. Pay-per-click advertising is also commonly used on Internet sites; though less so than in the youth product segment.

There are also several luxury tourism web portals available. These feature mainly luxury hotel accommodations, although ecotours and natural destinations are sometimes featured as well. Some examples:

- Luxury Link - (feature web auctions for tours and accommodations)
<http://www.luxurylink.com/>
- Luxury Travel - <http://www.luxurytravel.com/>
- Forbes Traveler - <http://www.forbestraveler.com/>

International luxury travel trade shows are:

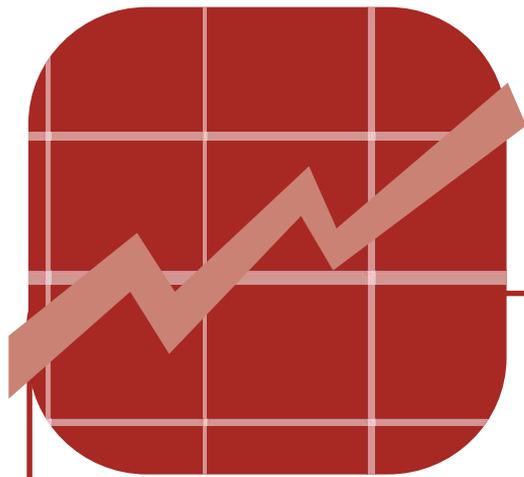
- The Luxury Travel Fair in London, U.K., November, 2009 (presented by Condé Nast Traveller)
- The Luxury Travel Expo in Las Vegas, U.S., December, 2009 (produced by Luxury Travel Advisor and Travel Agent Magazine)
- "Meeting Luxury" International Luxury Travel Exhibition in Lugano, Italy, April 2009

3.8.6 Social and environmental standards applied

The social and environmental standards applied with respect to the types of tour will be similar to those in other product segments. Many tour operators are members of industry organizations, such as the Association of Independent Tour Operators (AITO). In the U.K., members of AITO can be rated on their Responsible Tourism star system which was launched in autumn 2008, where any company with two Responsible Tourism stars means the member has gone above and beyond the minimum requirements expected by AITO (e.g. companies with a three star rating - Bales Worldwide; a five star rating - Journey Latin America and Tribes Travel). Although these types of ratings are not limited to High-end tour operators, like other market segment operators, many luxury tour operators seek industry ratings to improve their credibility.

Some tour companies have developed their own selection criteria for local charity organizations with which they partner (e.g. Elevate Destinations, Lindblad Expeditions, Journey Latin America), while others partner with international non-profit organizations that do work in their destinations (e.g. Conservation International, The Nature Conservancy, The United Way).

Travelers' philanthropy programs can be developed with the assistance of non-profit organizations like the Center for Responsible Travel and their Travelers' Philanthropy "Experts Bureau," that will develop tailored recommendations based on careful vetting and selection criteria.



SECTION 4

**Marketing
Recommendations**

Marketing Recommendations

Tourism companies and destination management organizations alike have limited resources available to spend on marketing. It is very important, therefore, that these resources be spent in ways that will maximize their return. In the recommendations below, the research team has identified a mix of the basic elements that should be included in any marketing initiative, along with a few ideas that capitalize on the latest consumer trends and seek to maximize returns from relatively small investments.

4.1 Use of Intermediaries

The travel and tourism industry has a unique set of intermediaries that market and sell holidays to consumers. These include guidebooks, the Internet, and, most importantly for this study, tour retailers - travel agents and outbound tour operators that put together vacation packages. These intermediaries play an important role in influencing customers' purchase decisions. Travel agents, tour operators, and incentive travel and vacation planners are looked to for advice on destinations, hotels, attractions, vacation packages, tours, and transportation. Customers view them as experts and take their recommendations seriously.

Although not technically intermediaries, travelers also rely on the expertise of others (like friends and family and the travel media) who have visited a potential vacation spot and can give reliable first-hand opinions.

Leveraging these intermediaries to inform the decisions of consumers is an important way to attract new visitors to your destination.

4.1.1 Generate Word of Mouth Advertising

Recommendation: *Generate word of mouth advertising by providing high value for money travel experiences and delivering on promises:*

The best way to attract new customers is to satisfy the ones you've got. When people come back from vacation, they love to tell their friends and family all about it, and now more than ever they are sharing their experiences with increasingly wide networks. Research finds that when customers have good experiences, they tell an average of three people, but when they have a bad experience, they tell a median of nine to ten people.²⁸³ With the popularity of online forums like TripAdvisor.com (see Section 5.3.6 below), one unhappy customer complaint can reach thousands. Conversely, a slew of satisfied customers who post positive comments about a destination can drown out occasional complaints. By creating happy customers, you turn your existing clients into publicists who can help to sell your destination, business, attraction, or product in a more compelling and seemingly unbiased way than through paid advertising. Some things to keep in mind are:

Focus on value and the experience: *Creating customer satisfaction depends on providing high value, not necessarily high cost products. Businesses and destinations operating in any price class can satisfy customers and generate word of mouth advertising by providing a high value experience for the price paid. This can be achieved through outstanding customer service, exceeding expectations, and setting a realistic price.*

Deliver on promises: Generally speaking, customers can be satisfied and will speak positively about their holiday experiences if their expectations are met or exceeded. It is important, therefore, to present a positive but realistic impression in your marketing materials. Many consumers today are wary of marketing messages and savvy enough to see through hype, so don't oversell.

Earn a good reputation in the trade: Satisfying your customers will help you to earn a good reputation among your industry peers. If you are known by other in-country operators for providing high quality services, you are much more likely to be recommended to international wholesalers.

4.1.2 Create a large network of positive relationships

Recommendation: *Actively develop positive relationships with intermediaries along the supply chain (domestic ground handlers, wholesalers, retailers, airlines, and ancillary service providers).*

Tourism business and destinations have at least two “customers”: the end consumers who vacations with you, and the intermediaries who send them to you. Outbound operators interviewed for this study said that in selecting new in-country businesses to sell, they invariably turn to their existing in-country network for recommendations. Earning a good reputation as a reliable, fast, and fair business partner is critical, and can generate more business when trade representatives talk positively about you to one another.

Grow your network: Business operators who are active in the chamber of commerce, convention and visitors' bureau, ecotourism societies, and other related organizations can make a name for themselves among their peers in the industry. Join domestic and international trade groups, associations, and clubs and then be sure to attend the events, post on blogs, and meet as many colleagues as possible. Let them know that you have a great product and that you're a good person to work with.

Be reliable: The intermediaries have to satisfy their own clients, and may get blamed for your poor service. If a travel agent recommends your lodge or attraction, for example, and that customer has a bad experience, they may blame the travel agent for sending them as much as you for providing the poor service. So intermediaries must feel confident and comfortable that you will provide good service and value to their travel customers.

Be fast. Inquiries must be responded to promptly. Travel deals “close” quickly and technology has helped the process move even faster. Providing information right away helps inspire confidence.

4.1.3 Get a place in the big picture

Recommendation: *Take advantage of collective tourism marketing initiatives, at the international, regional, national, and local levels to get your destination or business featured.*

National, state, and city ministries of tourism, DMO's, tourism chambers of commerce, and similar entities typically have an annual marketing budget. Contact these various tourism associations and make sure that they are aware of the responsible products you are offering. Make your voice heard.

4.1.4 Leverage 3rd Party Endorsements

Recommendation: *Actively participate in responsible practices training programs led by non-profits and development agencies; get certified, and apply for awards*

A handful of international development organizations and national non-profits are promoting uptake of responsible operating practices at the destination and business levels. By actively participating in these programs and making the recommended improvements, destinations and businesses can rightfully spread the word that they are doing their part to become responsible players.

Go to the training workshops: Participating in training courses offered by these groups, including those offered by SNV, can lead to excellent networking opportunities with like-minded businesses.

Implement the recommended practices: In some cases, active participation can lead directly to special marketing opportunities like in Ecuador, where the Fondo Mixto para Promoción Turístico used their widely distributed Ecuador Travel Planner to highlight the businesses involved in Rainforest Alliance's responsible practices training program.

Get certified: International and domestic certification programs offer a formal seal of approval from third parties. Savvy contentious consumers look for these seals and ratings when choosing their holidays.

Apply for awards: Eco-awards for responsible tourism businesses have become more democratic over the past few years and allow a wider number of small players to receive fair consideration. The evaluation criteria too have become more sophisticated, thereby adding legitimacy to the publicity generated for winners. When Nicaraguan Ecolodge, Finca Esperanza Verde, won an award from Smithsonian in 2004, for example, bookings increased dramatically. See Resource List in Annex IV for a listing and description of responsible tourism awards.

4.2 The Marketing Plan

4.2.1 Develop a marketing plan

Recommendation: *Develop a marketing plan to target international visitors through a range of mediums and distribution channels.*

"The first step for effective marketing is to have a plan," says Douglas Frechtling, Professor of Tourism Marketing at The George Washington University's Department of Tourism and Hospitality Management.²⁸⁴ The marketing plan is the blueprint for all your marketing activities and provides structure to your efforts. The purpose of the plan is to match your product with the right market, thereby providing optimum return on your investment. Regardless of the size of a business or destination, all should have a marketing plan. In developing a marketing plan:

Seek advice from regional, state, and national tourism offices: Ask them what are the most important marketing outlets and venues for you to use. Find out how and where they are marketing and work to make sure your business or destination is included in their promotional materials.

Address changing consumer expectations: Keep track of consumer trends such as those covered in this study and fine tune your products and messages to meet current consumer interests and vacation patterns.

Keep in mind changing technologies and the way consumers get information: In recent years, the Internet has rapidly changed how consumers receive information and make decisions about travel.

Consumers are using the Internet and social marketing to reach a large audience quickly: Word of mouth is a trusted source of information for travelers. By using the Internet and social networking sites and outlets, travelers produce information that is personal and first-hand, and this can be even more powerful than a company's own paid advertising and marketing. Consumer review websites, travel blogs, photo sharing, and video sharing websites are making it easier for consumers to communicate to large audiences and share what they thought of their travel experience.

The Key Elements of a Marketing Plan Include:	
A clear business objective	Outbound tour operators want to work with destinations, tourism organizations, and businesses that have clear objectives and a clear vision of what is offered. This needs to be incorporated within the overall marketing plan.
Assessment of the current market environment	Understand the internal and external factors that will affect business and your market.
Identify your key market	Determine which segment of the market is most likely to want your product.
Marketing objectives	These should be measurable and achievable. Give yourself a timeline to achieve these objectives.
Marketing strategies	Determine the best marketing mix and positioning approach for your business or destination.
Action plan	Delineate concrete steps to be taken and assign due dates to each one.
Budget	Establish the total amount you spend on marketing for the year, and delineate how you will allocate the resources, leaving some room to take advantage of unexpected opportunities.
Monitoring and evaluation	Measure the performance of your marketing efforts.

Adapted from Tourism Australia (2008). The Marketing Plan.

4.2.2 Know your market

Developing your product to an international standard requires a good understanding of international consumer needs, motivations, and different travel styles, as well as language, cultural, and culinary requirements. Use this report, your own experiences, and other resources see where your product fits internationally and select the right markets for your product.

Knowing your target market is critical to marketing success: Whether you are targeting the end consumer or travel intermediaries, you must understand what they expect from your destination and hope to gain from your product. Understanding your target consumer will guide

the development of your product, how you price it, where the product is sold, and how you promote it to consumers.

Understand the distribution systems, traditional and online in your target markets: Research partners in the markets you wish to work with and ensure your product price structure can support the commission levels required by these partners.

Do not try to enter every market at once: Select your markets carefully and take the time to plan a sound approach. Remember that different types of people have different requirements: an Asian honeymoon couple will be different from the German backpacker and different from a Canadian family on holiday. Targeting particular countries or market segments enables you to more effectively tailor your product and your promotional activities.

Know what motivates the inbound responsible travelers: In Section 2 of this report, we have provided an overview of the *end consumers of responsible tourism products* across all markets. This information should provide a basis for understanding potential consumers of your products. It is important to keep in mind that there are differences between the consumers from different source markets and product segments. Generally, however, 'responsible' tourists from the various source markets will share many similar values, interests, and other characteristics.

4.2.3 Develop the marketing message

Focus on the consumer experience: The principal products offered to vacationers are experiences and hospitality. The experience is made up of a number of components including: transportation, accommodation, dining, shopping, entertainment, touring, and events. Albeit important to the overall tourism experience, the product itself (e.g., a hotel) is generally not the primary reason for the visit to a destination. As such, it is imperative to work cooperatively to promote your destination or region as a total package or experience.

Create new, clear promotional messages for your product: Many have limited knowledge of your destination, so it will be important to highlight the unique attractions of your destination as a whole, e.g. natural beauty, World Heritage Sites, unique culture, etc. and link these to the product segments you are targeting.

Highlight your responsible tourism practices: Be proud of the good practices you've implemented and share your accomplishments with the public and partners, but don't exaggerate or let green publicity take the place of real change (a.k.a. greenwashing). It makes good business sense to emphasize these points since demand from consumers, tour operators and other intermediaries is growing.

One U.S. expert from a destination marketing agency offered a few important marketing messages that SNV destinations should keep in mind. He said the destination should be marketed as:

- **Affordable**
- **New and undiscovered**
- **Full of nature – connotes ecological, primitive, green**

4.2.4 Determine if your product is international ready

Below, we have highlighted some questions that DMOs, inbound operators, and individual businesses should consider to see if their product is ready for the international market.

Is Your Product International Ready?

Does your product meet high safety and service quality standards?

Do you have efficient inventory management systems in place?

Can you provide high quality service in English or other European languages (e.g. German, French, Dutch)?

Can the inbound operator allow for up to 30% commission?

Can the ground operator guarantee prices for 12-18 months? This is particularly important given the current economic recession. Consumers need reliability and assurances that prices can be guaranteed.

Is the product established in the domestic market? This can indicate initial touristic appeal.

Has the ground operator researched the international market they want to target?

If you believe the product is international ready, the next step is to plan your promotional activities.

4.2.5 Create and execute a public relations plan

The term “public relations” or “PR” refers to all the activities that a travel organization or business uses to maintain or improve its image and relationships with other organizations and individuals.²⁸⁵ These efforts include generating “publicity” or nonpaid or low cost communication, such as via media coverage, the Internet, travel awards, and NGOs and other organizations or development agencies. The primary advantages of publicity over paid advertisements are that the information is seen as independent and reliable, and can reach large audiences who would be too expensive to reach with ads. Good public relations makes the other elements of marketing (advertising, sales promotion, merchandising, and personal selling) more effective.

Positive publicity is generated by creating and executing a succinct public relations plan over a defined period of time. When doing so, keep in mind: **Maintain a positive public presence.** Personal opinion has an above average impact on customers who are choosing hospitality and travel services. Customers can not try out the product before buying them so friends, relatives, business associates, opinion leaders, and knowledgeable professionals are the social opinion sources that customers rely heavily on. The first step is to ensure you are offering a high quality product or service; public relations efforts build on that to ensure that opinions are favorable.

Consider partnering with a public relations agency in your target markets. Even with limited resources, a PR agency can help you gain exposure in your target market. They are experts in the markets you want to target, use a variety of innovative and strategic approaches, and have many media contacts. They can help you define your public relations objectives, provide creative services to develop materials, programs, and events for you, and can do this within your given budget.

Here are some examples of Public Relations Plans available online:

- *Mississippi PR Plan 2009:*
http://www.visitmississippi.org/resources/a_fy09_pr_marketing_plan.pdf
- *A generic sample PR Plan:* <http://www.davedolak.com/prplan.htm>
- *PR plan Advice:*
<http://www.entrepreneur.com/marketing/publicrelations/prcolumnist/article173460.html>

- A fill-in-the-blank template: <http://www.nku.edu/~turney/prclass/readings/plan2.html>

4.3 Leveraging the Media

Recommendation: *Actively seek media exposure and work to manage the message. Try to be featured in guidebooks, television and radio programs, and print and online media articles. Apply for sustainable tourism awards and collaborate with NGOs and development agencies that are running responsible tourism projects.*

For any travel company hoping to increase business volume, gaining media exposure is invaluable. The media, including newspapers, magazines, television, and radio, are the primary target of publicity efforts. Being featured or at least listed in guidebooks is a must. The growing number of responsible tourism awards also offer excellent opportunities for positive publicity. All of these are perceived by the public as objective and unbiased sources that help to shape travel decisions. There are several ways to gain exposure through the media without developing expensive advertising campaigns.

Why is this important?

Source of objective information: Tourists research the destinations they plan to go to and look to the media, guidebooks, and the Internet for unbiased information.

Source of inspiration: They can be inspired by what they see on TV, read in the newspaper or magazines or even the Internet.

Endorsement by experts: Responsible travel awards which are judged by well respected experts and publicized at public events and in major media carry considerable prestige which businesses can use in their own advertising. (See Section 3.2)

Alignment with NGOs and development agencies: Becoming involved with NGOs (such as Rainforest Alliance, CREST, TIES) or development agencies (SNV, USAID, World Bank, Inter-American Development Bank) that are promoting best practices offers another form of prestigious and low cost publicity. (See Section 3.2)

4.3.1 Cultivate relationships

Travel writers and editors rely on networks of contacts that were developed over long periods for their story ideas and information. You should identify several key writers and editors of influential or niche publications or who specialize in covering sustainable tourism, and invest time in reaching out to them. But don't be too pushy as this can work against you.

4.3.2 Host the Media (familiarization or “fam” trips)

Media hosting and familiarization (fam) trips offer important opportunities to personally familiarize travel journalists with a destination and/or individual businesses.

Fam trips are free or reduced price trips for travel agents, wholesalers, outbound operators, and the media (especially free lance and from smaller news outlets) to encourage them to recommend or promote your business. Frequently, the costs of these trips are shared among the carriers, suppliers, and destination marketing groups. Consider partnering with a local NGO in hosting media.

In recent years, larger and more reputable media outlets have begun barring their journalists from accepting fam trips because they compromise objectively; when they go on organized trips or make site visits, they must pay. In addition, some journalists, like those from *Condé Nast Traveler*, are required to travel incognito to avoid receiving special treatment. This is yet another reason for your business to consistently maintain a high value product and good service.

Find ways to generate interest with the media. If you are involved in a community project with positive results, have been certified, or have won an eco-award, inviting the media is a good way to gain exposure for the good works you have done.

4.3.3 Prepare Media kits

Reporters work on deadlines and often need information quickly. It is therefore useful to have an updated media kit ready on short notice and posted on your website. It is much better for an organization to anticipate media requests for information and photographs than to have to assemble the kit at the last minute. Below is a list of key items to include in a media kit.

Essentials for a Media Kit:
A fact sheet containing information about your product(s)
One or two of your latest press releases that highlight key newsworthy aspects of your product
A copy of your brochure
Selected photography that is 'print quality', i.e. high resolution, available on CD-ROM or as a downloadable file containing PR images (motivational images)
Staff biographies and contact information

Adapted from Tourism Australia (2008). The Marketing Plan.

4.3.4 Gain exposure through travel guidebooks

Many travelers, particularly independent travelers, use guidebooks as a resource in travel planning. Most travelers don't leave home without one or more guidebooks in tow. The results of Tourism Queensland's Ecotourism Market surveys show that travel guidebooks are consistently amongst the top three sources of information used by ecotourists (.). Oftentimes, the guidebook may be the only source of information for the tourist while in-country and the tourist will rely on their guidebook for information on where to stay, the activities to do, and places to eat. It is therefore essential for any tourism business to seek inclusion in guidebooks.

Table 43: Top Three Sources of Information to Research Destinations used by Ecotourists from Germany, the United Kingdom, and the United States.

Germany		United Kingdom		United States	
Travel agents	52%	Internet travel sites	44%	Internet travel sites	55%
Travel books and guides	47%	Travel books and guides	41%	Travel books and guides	49%
Friends or relatives who have visited the country	44%	Travel agents	34%	Magazine articles / travel sections	34%

Study commissioned by the Destination Australia Market Alliance. Respondents were interviewed in their own country. Total sample size in Germany (1012 persons), the U.K. (1004 persons) and the U.S. (1017 persons).

Source: Destination Queensland, Tourism Queensland, 2004. 'The German Ecotourism Market'; 'The U.K. Ecotourism Market'; and 'The U.S. Ecotourism Market'.

Whether and how guidebooks promote responsible travel varies from one company to another. (see Annex III for detailed guidebook analysis). Books that emphasize responsible tourism may even feature exceptional organizations e.g. Frommer's, Moon, and Lonely Planet Travel Guides. The process for inclusion in guidebooks also varies. For example, Lonely Planet has a system in which service providers are able to provide information through the Lonely Planet contact page. Lonely Planet authors then may choose to visit and / or profile the business in the next edition. Contact information for some popular guidebooks is listed below:

Guidebook	Primary Audience	Contact
Bradt Travel Guides	U.S., Canada	info@bradtguides.com, +44 (0)1753 893444
Fodor's	U.S., Canada, U.K.	editors@fodors.com, +212 572 2313
Frommer's	U.S., Canada	http://www.frommers.com/contact_us/
Let's Go	U.S., Canada	publicity@lets-go.com, +1 617 495 9659
Lonely Planet	U.S., Canada, U.K., Australia, global	http://www.lonelyplanet.com/contact/general-feedback.cfm
Moon Travel Guides	U.S., Canada	avalon.publicity@perseusbooks.com +1 510 595 3664
Rough Guide	U.S., Canada	http://www.roughguides.com/website/aboutus/ContactUs/Default.aspx +1 212 414 3635
Der Varta	Germany	http://www.varta-guide.de/vartaguide
Guide du Routard	France	www.routard.com
Michael Muller Verlag	Germany	http://www.michael-mueller-verlag.de/
ADAC	Germany	www.adac.de
Guia Trotamundos	Spain	http://www.guiadeltroramundos.es
Yvonn Van Der Bijl	Holland	http://www.yvonnevanderbijl.nl/

Source: Compiled by CREST, 2009.

Figure 14: Steps to Make Contact with a Travel Guidebook Company

Making Contact with a Travel Guidebook Company

Each guide book has a different procedure but generally the first step is to contact the guidebook directly (ideally via email or their online forms). When contacting guidebooks,

1) Make sure to include contact information,

- Company name, phone number, mailing address, email and website
- Company background and brief description of your services
- If possible, send a media kit to the guidebook company

2) Follow-up with a phone call if possible

Examples of processes for contacting guidebooks:

<i>Lonely Planet</i>	<i>Frommer's</i>
<ul style="list-style-type: none">● Go to their Feedback form on their website,● Select "I am a business owner."● Choose "Please list my business in your products" from the drop-down menu.	<ul style="list-style-type: none">● On the Frommer's site, select "Request for Review."● The site will then be directed to a section titled 'Establishment Submissions'. Click on the "Contact Us" link and craft a message on the feedback form with the heading "Request for Review."

A sample message could read:

Dear Editors,

I am contacting you with an inquiry on behalf of *[company name]*.

We would like to inquire about the process of inclusion in any chapters or resource lists pertaining to sustainable, responsible, or ethical tourism in future editions of *[guidebook name - destination]*. Here is some background information on our organization: *[List information outlined above]*. Please direct us with the next steps for inclusion in your guidebooks; we would greatly appreciate it.

The research team examined 27 travel guidebooks from seven publishers for references to Eco-, Sustainable, Ethical, Responsible, Community-based and / or Green tourism. Table 44 lists all the guidebooks each brand produced for the selected destinations countries in Central America, South America, and Nepal.

Table 44 : Publications Produced by Guidebook Publishers for Selected Destinations

Publishers	Bradt	Fodor's	Frommer's	Let's Go	Lonely Planet	Moon	Rough Guide
Asia (Nepal)	Shangri-La: A Travel Guide to the Himalayan Dream; Michael Buckley				Nepal: Stan Armington Trekking in Nepal Himalaya; Stan Armington	Nepal; Kelly Moran	Nepal; James McConnachie, <i>et al.</i>
Central America (Nicaragua, Honduras, Guatemala)		Central America; Ed. Adam Taplin Guatemala; Jeffrey Van Fleet Peru; Josh McIlvain	Central America; Eliot Greenspan, et al. Guatemala; Eliot Greenspan.	Central America; Ed. Manuela Zonense in	Central America on a Shoestring; Danny Palmerlee, et al. Guatemala; Lucas Vidgen Honduras and the Bay Islands; Gary Prado Chandler Nicaragua and El Salvador; Gary Prado Chandler	Guatemala; Al Argueta Guatemala's Western Highlands; Al Argueta Tikal and Guatemala; Al Argueta Honduras; Christ Humphrey Nicaragua; Randal Wood & Joshua Berman Living Abroad in Nicaragua; Randal Wood & Joshua Berman	First Time Latin America; James Read Central America: Jamey Bergman Central America on a Budget; author not listed Guatemala; Iain Stewardt
South America (Bolivia, Ecuador, Nicaragua)	The Amazon; Roger Harris & Peter Hutchinson Bolivia; David Atkinson Peru and Bolivia: Backpacking and Trekking; Hilary Bradt <i>et al.</i>	South America; Ed. Kelly Kealy, et al.	South America; Shawn Blore, <i>et al.</i> Ecuador and Galapagos Islands; Eliot Greenspan. Peru; Neil E. Schlecht	Central America; Ed. Manuela Zonense in	South America on a Shoestring; Danny Palmerlee, <i>et al.</i> Bolivia; Kate Armstrong, et al. Ecuador and the Galapagos; Danny Palmerlee, et al. Peru; Sarah Benson	Ecuador; Julian Smith Ecuador and Galapagos Islands; Julian Smith & Jean Brown Peru; Ross Wehner Cusco and Machu Pichu; Ross Wehner	South America; Dilwyn Jenkins Bolivia; James Read Ecuador including Galapagos Islands: Harry Ades Peru; Dilwyn Jenkins

Note: Those in **bold** were examined in detail.

4.3.5 Advertising

Advertising directly to end consumers can be an expensive investment that may not yield a good return. For businesses and DMOs with limited budgets, it is especially difficult to advertise effectively in international markets. We have provided some low cost advertising options and some more expensive suggestions below. Either way, your marketing message should be clear in your advertisement.

Cooperative advertising and promotional activities

Cooperatively promote the destination: Cooperative marketing is often more cost-effective and offers greater exposure and impact than activities undertaken by individual businesses. As discussed in Section 5.1 on the use of intermediaries, it is beneficial to explore cooperative marketing opportunities given a limited marketing budget. Because the destination is more important to the visitor experience than the product, it is better to cooperatively promote your business as part of an advertising campaign for the destination or region as a whole.

Local operators should work in cooperation and create a package or bundle that will make your product more enticing (both to potential partners and the end consumer).

Partnered businesses and smaller DMOs should consider cooperative advertising to both travel trade and end consumers through regional, state and national tourism organizations that promote the destination.

Internet and digital marketing.

It is important to maintain an online presence for your product, at least through your own website and potentially by advertising on other related tourism sites.

The number of international visitors that use the Internet to research and gather information before arrival to a destination has been rapidly rising (See Section 1.2).

Have an effective and attractive website: See the box below for a few basic considerations when developing a website.

Provide booking facilities on your own website: Travelers today want convenience, and online booking is a fast, easy way for independent travelers to plan their vacations. Consumers must trust that their online experience is secure and reliable. Therefore, effective inventory management and booking confirmations must be in place before this function is rolled out. Direct online booking can impact your existing distribution relationships. Some operators develop mirror sites for their travel partners, which provides the same product information but sends the travel bookings or response back to the distribution partner or can send inquiries to you via their site (e.g. ResponsibleTravel.com).

Online "banner" advertising and online databases: These can be effective means of publicizing your website. Some online databases, particularly the ones that emphasize responsible travel, provide free listings for responsible travel companies and organizations (see the Resource List in Annex IV). Before spending on online advertisements, evaluate the websites or database concerned and review the quality and size of the audience each attracts. You should also ensure that links to your site are properly placed on the sites of regional, state, and national tourism organizations. Given the costs of advertising, you may want to try advertising to the domestic and regional markets before attempting to break into the international market.

Brochures

Brochure production is a major promotional expense.

Who is the target for your brochure? Decide whether your brochure will be distributed to consumers, the travel trade, or both. Make sure the brochure suits the target consumer, provides necessary information, and gives a positive impression.

Domestic and regional brochure distribution: If you have the budget, we recommend distributing brochures domestically or regionally. This will create more awareness of your location or product within the destination country. Remember: domestic and regional tourism is very important, especially in periods when overseas tourism declines. Consider having brochures or advertising at visitor information centers.

International brochures: For the international market, concentrate on the most important sending countries for your destination. Target potential travel partners and distributors and the most relevant travel trade shows. You can also consider direct mail to the travel trade.

Traditional advertising

Print advertising: Traditional print ads in newspapers, magazines, radio and television is very expensive. It is most appropriate for High-end Tourism products or destinations for new or highly unique properties or attractions. Niche products should consider print advertising in corresponding niche magazines. See the Resource List in Annex IV for a list of potential places to advertise.

Cooperative advertising: Consider working cooperatively for international traditional advertising at the destination level. Keep in touch with your regional and national tourism organizations to see what initiatives might be in place. Many national DMOs hire advertising/PR firms in outbound countries. See if you can get your product into their promotional pipeline.

4.3.6 Leverage media technologies

Recommendation: *Leverage new media technologies to your advantage. Take note of "Travel 2.0"*

The movement of the Internet towards an increasingly interactive format, dubbed "Web 2.0" or "new media" combined with the growing interest in more authentic travel experiences has propelled the tourism industry into what some have called "Travel 2.0." In short, when making travel plans, individuals increasingly seek out the opinions of everyday travelers for guidance rather than those of professional travel writers or travel agents. Since the new technologies available on the Internet allow people to share and access this information much more easily, tourism businesses and organizations need to continually monitor information that is being circulated about their services or destinations. The positive side of this increased interactivity is that tourism-related businesses can conduct promotion and research efforts in more cost-effective ways. The negative side is that a business or destination's image can be much more easily affected should clients decide to post negative reviews on forums or rating sites.

The following are recommended Web 2.0 technologies and their application in the tourism sector:

Search Engine Optimisation and using Google Analytics

Your website is a very important tool to attract international business. As such, you should be sure to make your website visible to potential travelers and partners in overseas markets.

Search engine optimisation (SEO): Adjusting the content of your site so that it ranks higher in the list of search results for particular key words or phrases. For example, if your nature or adventure tourism business offers Nepal, you want to make sure that it appears high on the list of the results if someone enters “responsible”, “hiking” and “Nepal” in a search engine. Many outbound travel companies interviewed indicated that this is a practice they utilize. This can be an expensive process if you decide to hire an outside company, so you might look for an NGO or company that offers discounts or free service to those practicing responsible tourism.

Google's "Search Engine Optimization Starter Guide"¹²⁸⁶ is a valuable resource. This document, available through Google, will provide you an outline of the best practices in SEO and make it easier for search engines to find and index your content.

Learn which search engine your target consumers use and how those search engines operate. We discuss Google because it is one of the most popular search engines worldwide and operates in multiple languages. However, there are other search engines that may be important in your target market.

Google Analytics is one of the best tools to help you analyze your web traffic. It is a free resource if you have a Google account. It will provide you with an enormous amount of information about who is visiting your site, what they are looking for, and how they are getting there. Google Analytics helps you find out what key words attract your most desirable prospects, what advertising copy pulled the most responses, and what landing pages and content makes the most money for you. The “Official Google Analytics Blog” is a useful resource. www.analytics.blogspot.com

Website Optimization means creating and testing different combinations of site content to increase visitor conversion rates and overall visitor satisfaction. To do this, you identify your most visited page first.

What Makes an Effective Website?
Secure a domain name that is easy to remember
Ensure the site is quick to load and easy to use. We find Flash sites, although attractive, are frustrating to use for travel bookings.
Have clear navigation paths.
Provide accurate, high quality information.
Use maps so that users can find your location.
Provide an interactive way for users to discuss or provide feedback.
Offer simple booking processes.
Consider language options for your website for your target international market.

Source: Compiled by CREST, 2009.

Upload videos and maintain photo galleries, both on your website and external sites
Posting videos and photos on your website is an easy step into the world of social media. Videos can be promotional in the style of commercials or they can be more informational, like a brief video tour. Any visual material that can give potential travelers an idea of what to expect at the destination will be considered helpful.

Post photos and videos outside of your website, for example on Flickr.com, one of the largest photo sharing sites on the web. As is standard in Web 2.0 technologies, Flickr accounts allow other users to comment on your photos. This opportunity to receive feedback can be a valuable way to gauge interest in your destination or your company. Active participation in social media can even ultimately save your organization money on market research.

Consider developing audio or video podcasts

Podcasts are informational programs, in audio or video format, that are released at regular intervals on your website and available for automatic download. Bi-monthly or monthly episodes may be ideal for small-scale enterprises as they are often enough to get regular listeners but less resource-intensive as daily or weekly podcasts. Example program topics include:

A brief history of your destination and/or company: Many podcasts feature appearances by persons of authority such as local tourism director as well as interviews with front-line workers and with guests. This "behind the scenes" insight can be appealing to tourists who are interested in an authentic experience.

Lectures or stories: For example, the Director of an organization could craft an engaging lecture on responsible tourism and how your company or destination is implementing responsible practices, or you could recruit a local elder and record him or her telling a traditional story.

New developments: Podcasts can consist of monthly updates on community projects your company may be involved in. For example, you can share the monthly progress that's been made on the school your tour company is helping to finance or the guide-training programs your company has implemented.

If you decide to invest the time and effort to create these programs, be sure to circulate them on social networking sites (such as YouTube, Facebook, and Twitter) so as to maximize viewership and draw people to your website.

Maintain a blog

Regular posting on a blog is a low-cost alternative to podcasting. As mentioned in the Major Trends section in this reports Introduction, the YPartnership's 2008 Travel Monitor Study revealed that one in five travelers have consulted a blog for reviews about a travel service provider. Since you cannot control the information being circulated about you, it is important to take an active role in sharing information about your destination or company. A few example topics:

News: Blogs are most relevant when they are updated regularly. Many responsible tour operators maintain blogs in which they post general developments in responsible travel.

Your sustainability projects: Post updates on the progress your facility is making in implementing environmental sustainability standards.

Community projects: Progress on your companies' philanthropic partnerships.

Interesting news in your area: Upcoming holidays/festivals, news about your partners.

"Behind the scenes" features: Interviews with guides, porters, lodge staff, tour planners on topics like: their likes and dislikes about working in the tourism industry and the impact it has on their communities; unique features of their culture; what goes into planning an enjoyable experience for a tourist.

Solicit feedback by posting a question to visitors: For instance, you might ask them what they enjoyed most about their trip, what they learned, or what they would have improved.

Frequently asked questions: You could keep track of frequently asked questions by visitors at your destination and write pieces on those topics.

Weekly profiles: Share information about an animal or plant that is endemic to your area. Or have schoolchildren submit pieces about unique features of your local culture, including language, clothing, food, music, and architecture.

Photo of the day: A simple strategy would be to post a daily photo of interest along with a quick caption. You might ask guests to submit their favorite photos, and select the best, giving them credit.

You may want to mix up the authors of your posts (solicit pieces from directors, staff, and community members) in order to provide a more complete perspective of your organization or destination's operations. Be sure to allow comments on your posts. Again, interactivity is the distinguishing feature of the direction toward which the Internet and travel are moving.

If you choose to start a blog, be sure to advertise it and encourage your visitors to read it after leaving so as to build a regular readership. There are many blogs focusing on responsible travel (See Resource List in Annex IV), here are a few examples:

- *General Sustainable Travel:* Whole Travel Blog - <http://www.blog.wholetravel.com/>
- *An Eco-lodge:* Lapa Rios (Costa Rica) - <http://www.blog.laparios.com/>
- *Tour Operator:* Imaginative Traveller - <http://www.imaginative-traveller.com/our-blog>

Cultivate a presence on social networking sites

Have a web presence on social networking sites like Facebook, MySpace, and Twitter. Since many people maintain an account on at least one social networking site (Facebook alone has over 200 million active users), having a presence on one these sites is akin to spreading positive word-of-mouth publicity. There are several online resources that provide directions on how to get started on these sites. Here are a some examples:

- *How to Advertise Your Business on Facebook for Free:* <http://domainingdiva.com/advertising/how-to-advertise-your-business-on-facebook-for-free/>
- *Beginner's Guide to Twitter for Business:* <http://www.johnjantsch.com/TwitterforBusiness.pdf>

Read and share news and opinions on discussion forums

Post news on your business or projects on responsible travel-related forums like:

- *Care2.com - Responsible Travel Group:* <http://www.care2.com/c2c/group/ecotourism>
- *International Ecotourism Club Forum:* <http://www.ecoclub.com/c/index.php?>
- *Irresponsibletourism.info:* <http://www.irresponsibletourism.info/>
- *Planeta.com:* <http://www.forum.planeta.com/>
- *Responsible Tourism (RT) Forum:* <http://www.artforum.info/>
- *Lonely Planet's Thorn Tree Travel Forum:* <http://www.lonelyplanet.com/thorntree>

With the wide range of issues that are being discussed on these sites, there is great potential for business opportunities.

Beyond promoting your business or destination, it is important to be present on these forums to be aware of the issues others in the responsible tourism sector are discussing. Through these forums, you can keep abreast of topics of discussion and debate, emerging educational and training opportunities (conferences & workshops), new publications (handbooks & toolkits), solicitation for awards applications, or even students offering their services as interns.

Get listed on Eco-travel Portals

There are a growing number of travel portals with a focus on sustainability. These portals feature only businesses that have been certified under international programs or meet standards for sustainability put forward by the website. Some even have a direct booking function. The element of set sustainability standards and convenience of booking appeal to consumers. There are several such portals that would be worth approaching for a partnership (See Resource List in Annex IV); here are a few examples:

- *Step-Up Travel*: Lists small, responsible, unique activities and accommodations - <http://www.stepuptravel.org/>
- *iStayGreen.org*: Listings and bookings of environmentally friendly lodging - <http://www.istaygreen.org/>
- *Rainforest Alliance*: Eco-Index portal for certified tourism businesses in Latin America - <http://www.eco-indextourism.org/en/add>
- *World Hotel Link*: a portal for small, though not necessarily responsible, businesses - <http://www.whl.travel>

Be aware of your scores on Rating Sites

It is important to be aware of any information being circulated about your company or destination. Whether the feedback you find is positive or negative, you can always use it to improve upon your services. **TripAdvisor.com**, the largest travel community in the world, features ratings and reviews by registered users and attracts almost 30 million visitors a month. A few examples of rating and review sites include:

- *Holidays Uncovered*: U.K.-based site features reviews of most popular holidays <http://www.holidays-uncovered.co.uk/>
- *ResponsibleTravel.com*: U.K.-based site features independent holiday reviews; companies with responsible travel credentials are highlighted <http://www.responsibletravel.com/copy/Copy900003.htm>

DMOs may also be useful to introduce rating functions on their websites. Quito Ecuador's Visitors' Bureau in Quito is an example of a DMO that has found rating features useful. Its website has a rating system for local and regional attractions as well as a guestbook in which registered users can make comments.

Why keep track of your ratings? According to the report "Web 2.0 Strategies for Visitors, Travel Professionals and Government Officials," the Quito Visitors' Bureau has recognized cost-saving benefits of implementing a rating system on the Quito VB website. As It quotes Dominic Hamilton of the Bureau as states, "This will be a useful tool for travelers planning their visit. But it will [also] be a revelation for us at the Bureau: [such] feedback would otherwise cost us thousands of dollars (which we don't have!) to acquire through a market research agency."²⁸⁷

Pay attention to travel wikis

A wiki is a website on which the text can be edited by any user. Thus, what is written on a wiki is more likely to be an accurate reflection of the general view of a topic than any webpage written by a single person or organization. Examples of responsible travel-related wikis are:

- *The Good Tourism Wiki*: <http://www.good-tourism.com/>
- *Trip Advisor Inside*: <http://www.tripadvisor.com/TravelHome>

Consider Creating Markers on Open-Source Mapping Technologies

A low cost way to get your destination or business literally “on the map” is to create markers on open-source mapping technologies like Google Maps and/or Google Earth. These maps allow anyone to mark locations and add descriptions, photos, and videos to these locations. Since this is a relatively new source, the amount of content on these maps is still small so and therefore a business or destination that is marked has an opportunity to attract visitors.

The following are comprehensive resources for any DMO or tourism company who would like to add a presence on Google Earth:

- *Planeta Resource on Google Earth*: <http://planeta.wikispaces.com/google>
- *Google Guide to Google Earth*: <http://earth.google.com/userguide/v4/>

4.4 Accessing the Domestic and Regional Markets

The recommendations provided in this report not only aid in the assessment of the North American and European markets, but also for the domestic and regional markets which are important particularly as a buffer against downturns in the international market. Having a mix of consumer markets helps build more sustainability for both destinations and individual businesses. The following recommendations provide insight specifically for the developing and marketing tourism at the domestic or regional levels.

Recommendations: *Gather data on domestic and regional markets to specific destinations*

It is important to collect data on the motivations, characteristics, and visitor preferences of domestic and regional travelers. Gather data on questions such as: Why are people coming? What activities do they enjoy? Do the current products and services meet the needs and demands of the visitors? What changes in market demographics and consumer patterns are occurring during fluctuating economic times?

Example from Nepal: The highest number of arrivals to Nepal in 2007 was from India, comprising 18.2% of total visitor numbers. In 2007, approximately 34% of the Indian market traveled for leisure, followed by other purposes such as 10.7% for business and 10% for pilgrimages.²⁸⁸ Although the general purpose of visits is known, Discover Nepal says that “very limited consumer survey data is available for Nepal and this is a major weakness. It is unfortunate that 'heritage' and 'wildlife' were not probed separately (in the latest information) as motivators, because they can appeal to very different segments.”²⁸⁹

Recommendations: *Leverage media sources and inbound tour operators to better target domestic and regional tourism markets*

While utilizing diverse international sources provides many benefits, the best sources for country specific information are located within the regional or domestic location. Domestic media sources are more aware and knowledgeable about country-specific tourism information pertaining to culture, politics, weather patterns, etc. Therefore, utilizing domestic sources will provide more in-depth and accurate information as it pertains to tourism in a particular country, and better communication with the domestic market.

Example from Central America: Inbound tour operators or wholesalers are experts in regards to tourism products within the country. According to Mesoamerica Travel, one of the oldest and most experienced tour operators in Honduras, "The biggest seller for Central America is by far Costa Rica, followed by Guatemala and Belize. Honduras, Nicaragua and El Salvador are just developing tourism, so the operators selling these countries are either specialized in something very particular (Birding, Volunteer, Scientific) or are just starting to handle these countries as part of their offer."²⁹⁰

Leveraging the numerous national media sources includes creating partnerships with inbound operators, tourism organizations and government entities, national guidebooks and travel writers, local television, radio stations and newspapers. For example, numerous Guatemalan newspapers exist both off- and on-line. They include *La Hora*, *Prensa Libre*, *El Periódico*, *El Herald*, *Moneda*, *Siglo XXI*, *El Quetzalteco*, and *The Guatemala Times*. In Peru, a few magazines and newspapers that report on economic, political, and tourism-related topics include *Rumbos*, an environmental and travel magazine; *New World News*, a Cusco-based weekly that reports on tourism issues; *Lima Herald*, a business weekly; and *Andean Report*, a monthly magazine.

Table 45: Examples of Inbound Tour Operators that Target Domestic and International Travelers

Honduran Wholesalers	Nicaraguan Wholesalers
MC Tours Mayan Caribbean Turaser Destinos de Exito Mesoamerica Travel	Careli Tours Solentiname Tours Oro Travel Nicaragua Adventures
Peruvian Wholesalers	Ecuadorian Wholesalers
Andean Treks SAS Travel Peru Treks & Adventure Q'ENTE Explorandes Andina Travel Wayki Trek	Benjicar Travel Zenith Travel Surtrek Viajes Orion S.A. Ecuador Adventure

Source: Compiled by CREST, 2009.

Recommendations: *Develop an effective domestic marketing message*

Improving domestic tourism can offset the declines or seasonality from the international markets. The messaging for domestic markets requires a different strategy than for international campaigns, one that is centered on national concepts such as "getting to know your own cultural and natural heritage."

Example from Guatemala: As a result of the current economic crisis, Guatemala has shown a decrease in growth rates of its international market, The United States is Guatemala's second largest tourism source market, but Central America is its *first*.²⁹¹ In response to the downturn of U.S. visitors, the Guatemalan Institute of Tourism (Inguat) has sought to strengthen domestic tourism by motivating Guatemalans to take in-country weekend trips and holiday breaks.²⁹² This domestic-focused campaign will continue to be developed through 2009 and subsequent years.



SECTION 5

**Conclusion:
10 Key Marketing Points**

Conclusion:

10 Key Marketing Points

The central purpose of this report is to provide marketing advice and tools to destinations and businesses in Nepal and six Latin American countries which are implementing responsible tourism practices. The aim is to help them increase the number of visitors from source countries in Europe and North America. Below is a distillation of the most important points that tourism marketers and managers should keep in mind when trying to grow their businesses and attract conscientious consumers.

1. Deliver on your promises to consumers by providing high value for money experiences.

- A big marketing budget can't replace attention to good products and service.
- Satisfying customers today leads to more customers tomorrow.
- Word of mouth is the most powerful marketing tool and can work for or against you depending on your performance.
- Online forums are rapidly growing and increasing the importance of word of mouth referrals.
- Travelers are more knowledgeable and they have higher expectations than ever before. They easily see through marketing hype and quickly recognize poor efforts at quality.

2. Deliver on your promises to supply chain partners by providing high value for money experiences.

- These include outbound tour companies, travel agencies, ground handlers, airlines, and other service providers.
- A reputation for being reliable and fair will make you a more attractive partner to outbound operators.
- Represent your product accurately.
- Respond promptly to inquiries from overseas partners (within 24 hours).
- Make sure those in your network know you're looking for new clients.

3. Focus on intermediaries.

- Direct marketing to consumers can be expensive and inefficient. Identify key intermediaries who are marketing to consumers and use them to market for you.
- These include outbound tour operators, travel agents, guidebooks, media, travel associations, travel shows, and the Internet.
- Intermediaries who view your business as reliable and fair are more likely to bring you new customers.
- Take advantage of collective tourism marketing and advertising opportunities with DMOs, travel associations, tourism departments, and at travel shows.

4. Know your market

- Have target markets in mind that fit with your product.
- Keep abreast of consumer and industry trends, including in the realm of responsible travel.
- Recognize and respond to the different travel styles, interests, language, and other requirements of inbound travelers from different markets.
- Understand distributions systems, both traditional and new media technologies, in the target outbound markets.
- Do not try to enter every international market at the same time.

5. Develop and implement a marketing plan to target international, regional, and domestic travelers through a range of distribution channels.

- Determine whether your product is ready for the international market.
- Don't forget the domestic and regional markets which are important in weathering downturns in the international market.
- Earning a good reputation with domestic tourists first can lead to partnerships with inbound operators that are bringing international guests.
- Develop a written marketing plan with clear objectives and action plan, including dates for each step.
- Create an annual marketing budget.
- Develop marketing messages focused on the consumer's experience.
- Set measurable and achievable marketing objectives.
- Determine the best mix of marketing tools and positioning approach for your business.
- Measure performance and make necessary adjustments

6. Maximize your public relations (PR) to utilize a range of free or low cost communications.

- Create a PR plan designed to generate and maintain a positive public presence for your business or destination.
- PR outlets include the travel magazines and newspaper supplements, guidebooks, television, and Internet.
- Have media kits and promotional material readily available.
- Cultivate relationships with the media and guidebook writers.
- Host media and fam trips to show firsthand your tourism products. Treat them professionally; win them with fine service and products, not with free stays.
- Offer an 'angle' for travel writers to pick up on. Find the story your product tells.
- Try to be featured or listed in guidebooks. While less important than Internet in planning trips, guidebooks are still widely used during trips and therefore influence travel decisions.

7. Develop an attractive and easy to navigate website

- Secure an easy to remember domain name.
- Make sure the site has online booking facilities.
- Adjust the content of your site and key words in order to rank higher in the list of searched resorts. This is known as search engine optimization (SEO).
- Consider multiple language options for your target markets.
- Ask for guest feedback on your responsible tourism principles and practices, and post comments on the website.

8. Leverage new media (Web 2.0) technologies to your advantage

- Consumers are talking to each other through the Internet which enables them to reach a large audience quickly. Learn which search engine your target consumers use.
- Make sure you know what is being said online about your business or destination, maintain a strong web presence. Be aware of the ratings and reviews of business or destination sites such as TripAdvisor.com.
- Develop and maintain a presence on social networking sites, maintain a blog, and eco-travel portals, and participate in discussion forums.
- Keep track of new media trends.

9. Seek independent, 'third party' endorsements

- These are considered more objective than paid advertising or company websites.
- They include travel awards, 'green' certification' programs, NGOs and development agencies involved in tourism projects, and responsible travel websites.
- Apply for eco-awards and contests which can bring publicity and marketing potential.
- Get your company posted on responsible travel websites.
- Get certified and/or go through best practices training in sustainable tourism.
- Work with responsible tourism projects run by NGO and international agencies. This can both provide training and evaluation for your business as well as promotion.

10. Highlight your responsible tourism practices.

- Remember, this makes good business sense: demand from consumers, tour operators and other intermediaries, supply chain business, and the media is growing.
- Be proud of what you have done, and pledge your commitment to continual improvement. Don't exaggerate or engage in greenwashing.
- Put your CSR policy, commitment to the Global Baseline Criteria for Sustainable Tourism, and your company's specific social and environmental best practices on your website, in press releases, on the Internet, and display them on site.
- Publicize any eco-awards or other recognition your business or destination receives.
- Develop programs to involve both staff and guests in Travelers' Philanthropy projects.
- Join and support national, regional, and/or international responsible tourism associations and organisations.

ANNEX

0

**List of Outbound
Tour Operators**

Company	Website	Segment					Market					Destination						Telephone	Interviewed			
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua	Bolivia			Ecuador	Peru	
Adventures Within Reach (USA)	www.adventureswithinreach.com		1	1				1				1					1	1	1	877-232-5836; 303-325-3746	1	
Ambassador Tours (Spain)	www.ambassadortours.es	1		1						1			1					1			1	
Avial (Spain)	www.avial.es	1		1						1			1	1				1		34 91 447 8000	1	
Bales Worldwide (UK)	www.balesworldwide.com					1							1	1	1	1	1					
Bidon5 (Spain)	www.bidon5.es			1						1			1	1	1	1	1			915-476-126	1	
Boundless Journeys (USA)	www.boundlessjourneys.com	1		1				1												800-941-8010; 802-253-1840;	1	
Crillon Tours S.A. (USA)	www.titicaca.com			1												1				888-Titicaca; 305-358-5353	1	
Cross-Cultural Solutions (USA)	www.crossculturalsolutions.org			1																800-380-4777; 914-632-0022	1	
Culture Xplorers (USA)	www.cultureexplorers.com			1																866-877-2507	1	
Eco-Librium Sustainable Adventures (Can)	www.eco-libriumadventures.com					1														705-849-4048	1	
Global Exchange (USA)	www.globalexchange.org			1																415-255-7296	1	
Hauser Exkursionen (Ger)	www.hauser-exkursionen.de		1	1		1						1	1	1	1	1	1	1	1	49 (89) 23 50 06 0	1	
i-to-i (UK)	www.i-to-i.com																			800-985-4852	1	
KE Adventure Travel (UK)	www.keadventure.com	1																		USA: 800 497-9675; UK: 017687 73966	1	

Company	Website	Segment					Market					Destination					Telephone	Interviewed		
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua			Bolivia	Ecuador
Kepri (Can)	www.kepri.com	1	1	1			1	1									1	1	514-667-3377	1
Paso del Noreste (Spain)	www.pasonoroeste.com	1	1	1						1			1						34 91 758 5551	1
Quest Worldwide (Can)	www.questnaturetours.com	1		1			1					1	1	1					800-387-1483	1
Servicio Civil Internacional (Spain)	www.ongsci.org/es/		1							1		1			1				+34913663259	1
Viajes Esports 10 (Spain)	www.esports10.com	1		1						1		1							902-550-140	
Viajes Responsables (Spain)	www.viajesresponsables.com		1				1			1		1	1	1					(34) 971713391	1
Vlieg & Flets (Neth)	www.vliegenfiets.nl	1									1								+31 (0) 24-360 41 75	1
World Wide Active (Austria)	www.worldwideactive.at	1												1					+43 6245 77200	1
Adventure Alternative (UK)	www.adventurealternative.com	1									1								+44(0)28708 31258	
Adventure Life Journeys (USA)	www.Adventure-Life.com						1	1				1			1				800-344-6118; 406-541-2677	
Adventure Smith Explorations (USA)	www.adventuresmithexplorations.com	1											1						800-728-2875; 530-583-1775	
Adventures in Good Company (USA)	www.adventuresingoodcompany.com/area/Central-and-South-America						1					1							877-439-4042	
Amazing Peru (USA)	www.amazingperu.com																		800-704-2915; 800-704-2949	

Company	Website	Segment					Market				Destination						Telephone	Interviewed			
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua			Bolivia	Ecuador	Peru
Amerika Venture (USA)	www.amerikaventure.com		1					1					1	1	1		1	1	1	866-679-7070; 450-451-0709	
Amerispan (USA)	www.amerispan.com			1			1						1	1	1	1	1	1	1	800-879-6640; 215-751-1100	
Andean Trails (UK)	www.andeantrails.co.uk	1						1								1				44 (0)131 467 7086	
Backroads (USA)	www.backroads.com	1					1										1	1	1	800-462-2848; 510-527-1555	
Baobab (UK)	www.baobab.nl			1	1				1						1					020 - 6275129	
Blue Parallel (USA)	www.blueparallel.com					1		1							1			1	1	US: 301-263- 6670; 800-256- 5307; UK: +44(0) 20- 8819-3904	
cazenove + loyd (UK)	www.cazenoveandloyd.com					1									1			1	1	44 (0)20 7384 2332	
Class Adventure Travel (USA)	www.cat-travel.com						1	1	1									1	1	877-240-4770	
Colibri Umwelt Reisen (Colibri Environmental Trips) (Ger)	www.colibri-berlin.de			1		1				1								1	1	(03322) 1299-0	
Diamir (Ger)	www.diamir.de			1														1	1	(0351) 31207- 21	
Dim Sum (Neth)	www.dim-sum.nl			1							1									030-230 08 47	
Dragoman (UK)	www.dragoman.com	1													1			1	1		

Company	Website	Segment					Market				Destination						Telephone	Interviewed			
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua			Bolivia	Ecuador	Peru
Duma Naturreisen (Duma Nature Trips) (Ger)	www.duma-naturreisen.de					1			1						1		1	1	1	+49 (0) 711 8386580	
Eagle Eye Tours (Can)	www.eagle-eye.com					1	1							1			1	1	1	800-373-5678; 250-342-8640	
Education First (USA)	www.ef.com			1					1								1	1	1	(+)49 30 203 47 200	
Elevate Destinations (USA)	www.elevatedestinations.com				1		1							1			1	1	1	617-661-0203	
Exodus (USA)	www.exodus.co.uk	1					1	1				1	1	1	1	1	1	1	1	800-843-4272, 510-654-1879	
Explore Worldwide (USA)	www.explore.co.uk	1					1	1						1			1	1	1	0845 013 1539	
Far Horizons Archaeologica Tours (USA)	www.farhorizons.com			1										1					1	800-552-4575	
Fox Holidays (Neth)	www.fox.nl	1	1	1					1								1	1	1	(0252) 660000	
GAP Adventures (Can)	www.gapadventures.com	1					1	1					1	1	1	1	1	1	1	800-465-5600	
Gapforce (UK)	www.gapforce.org	1	1	1				1				1								(+44) (0) 207 384 3343	
GapYear.com (UK)	www.gapyear.com		1				1	1								1		1	1	44 (0)1473 230 766	
Gapyear365.com (USA)	www.gapyear365.com	1	1					1										1	1	202-657-6842	

Company	Website	Segment					Market				Destination						Telephone	Interviewed		
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua			Bolivia	Ecuador
Gebeco (Ger)	www.gebeco.de	1											1						0049 - (0) 431-5446-0	
Gecko's Grassroots Adventures (Aus)	www.geckosadventures.com		1				1	1				1	1	1	1	1	1	1	800-387-7902	
Geographic Expeditions (USA)	www.geoex.com				1		1						1	1	1	1	1	1	415-922-0448	
Global Vision International (USA)	www.gviusa.com			1	1		1	1					1	1	1	1	1	1	888-653-6028	
Gullivers Travel Associates (GTA) (UK)	www.gta-travel.com/europe.htm						1	1		1	1								212-843-9778	
Habitat for Humanity (USA)	www.habitat.org				1		1						1	1	1	1	1	1	800-422-4828	
Hands-up Holidays (UK)	www.handsupholidays.com						1	1				1		1					201-984-5372	
Intrepid Travel (USA)	www.intrepidtravel.com	1			1		1	1					1	1	1	1	1	1	866-847-8192	
Journey Latin America (UK)	www.journeylatinamerica.co.uk					1							1	1	1	1	1	1		
Koning Aap (Neth)	www.koningaap.nl					1						1							020-7887700	
Contiki (USA)	http://contiki.com/	1	1	1			1	1											1-866-CONTIKI	
Kras.nl (Neth)	www.kras.nl	1		1														1	0900 9697 (15 cpm)	

Company	Website	Segment						Market				Destination						Telephone	Interviewed		
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua	Bolivia			Ecuador	Peru
Kuoda Tours (USA)	www.inturkuoda.com					1		1							1	1	1	1	1	561-283-1727	
Kuoni Travel Holding Ltd (UK)	www.kuoni-group.com			1		1		1				1					1	1		(+41) 44 277 44 44	
Labrys (Neth)	www.labrystreizen.nl								1			1								024 -382 21 10	
Latin American Escapes (USA)	www.latinamericanescapes.com			1			1						1	1	1					800-510-5999	
Latin Discover (USA)	www.latindiscover.com	1									1		1							305-720-2539	
Lernidee Adventure Travel (Ger)	www.lernidee.de	1							1			1	1							030/7860000	
Lindblad Expeditions (USA)	www.expeditions.com/index.asp					1											1			0 180 5 33 74 00	
Meirs Weltreisen (Ger)	www.meiers-weltreisen.de					1					1			1						0 180 5 33 74 00	
Miller Reisen (Ger)	www.miller-reisen.de					1					1			1						(07529) 9713-0	
Natural Habitat Adventures (USA)	www.nat.hab.com/latinamerica						1												1	800-543-8917; 303-449-3711	
Nature Expeditions International (USA)	www.naturexp.com	1		1		1	1					1							1	(800)-869-0639	
OARS (Outdoor Adventure River Specialists) (USA)	www.oars.com	1						1											1	800-346-6277; 209-736-4677	
Oasis Overland (UK)	www.oasisoverland.co.uk	1																	1	(+44) 01963 363400	

Company	Website	Segment					Market				Destination						Telephone	Interviewed		
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua			Bolivia	Ecuador
Off the Beaten Path (USA)	www.offthebeatenpath.com			1				1					1						800-445-2995	
Oz Experience (AUS)	www.ozexperience.com	1	1					1	1	1									+61 (0)2 9213 1766	
Papaya Tours (Ger)	www.papayatours.de					1				1					1	1	1		+49 (0)221 - 35 55 77 0	
Peru Luxury Travel (USA)	www.peruluxurytravel.com				1			1	1						1	1	1		US: 866-753-9881; UK: 44.203.371.9763	
Raleigh International (UK)	www.raleighinternational.org			1					1				1	1	1				44 (0) 20 7183 1270	
Real Peru (UK)	www.thealperu.co.uk			1					1									1	0113 216 1440	
Riksja Online (Neth)	www.riksjaonline.nl			1						1					1	1	1		071-579 01 01	
Row Adventures (USA)	www.ROWadventures.com	1	1					1					1						800-451-6034; 208-765-0841	
Royal Hansa Voyages & Cruises (Neth)	www.royalhansa.nl					1				1									020-398 93 89	
Sapa Pana (Neth)	www.sapanatravel.nl									1									073-610 62 04	
Sawadee (Neth)	www.sawadee.nl			1						1					1	1	1		020-420 22 00	
Shoestring Company (Neth)	www.shoestring.nl	1			1							1							020-685 02 03	
Snow Leopard Adventures (Neth)	www.snowleopard.nl	1													1	1	1		070-388 28 67	

Company	Website	Segment					Market					Destination						Telephone	Interviewed	
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua	Bolivia			Ecuador
SNP (Neth)	www.snp.nl	1	1	1		1			1			1				1	1	1	024-327 70 00	
Sommer Fernreisen (Ger)	www.sommer-fern.de					1			1							1	1	1	08533 919161	
Soul Adventures (USA)	www.souladventures.org			1			1											1	303-881-5185	
SRC (Neth)	www.src-cultuurvakanties.nl			1				1											050 -312 31 23	
STA Travel -G*A*P Responsible Tourism (USA)	www.statravel.com	1	1				1	1												
Stray Travel (UK)	www.straytravel.com	1	1				1	1	1	1									+64 (0) 9 526 2140	
Summum Reizen (Neth)	www.summum.nl			1			1		1							1	1	1	+31-20-421 55 55	
Terra Incognita Ecotours (USA)	www.ecotours.com					1	1										1	1	877-463-9756; 813-289-1049	
The Leap (UK)	www.theleap.co.uk			1			1		1								1		011-44 -1672 519922	
The World Outdoors (USA)	www.theworldoutdoors.com	1					1	1									1	1	800-488-8483	
Thika Travel (Neth)	www.thikatravel.com					1			1									1	0346 -24 25 26	
Tiara Tours (Neth)	www.tiaratours.nl		1						1			1							076-565 28 79	
Tourismus Schiegg (Ger)	www.lateinamerika.de	1		1					1				1	1	1	1	1	1		
Travel Trend (Neth)	www.traveltrend.nl	1							1										0180 -39 33 33	

Company	Website	Segment					Market				Destination						Telephone	Interviewed		
		Adventure	Backpack	Culture & CBT*	Education & Volunteer	High-end	Nature	North America+	UK	Netherlands	Germany	Spain	Nepal	Guatemala	Honduras	Nicaragua			Bolivia	Ecuador
Tribes Travel (UK)	www.tribes.co.uk					1		1				1							01728 685971	
Vamonos Travels (Neth)	www.vamonos.nl					1		1				1							020-673 53 53	
Victor Emanuel Nature Tours (USA)	www.ventbird.com						1							1					800-328-VENT, 512-328-5221	
Viventura (Ger)	www.viventura.de		1						1						1	1	1		+49 30 6167558-0	
VNC Asia Travel (Neth)	www.vnc.nl		1						1			1							(030) 231 15 00	
Volunteer Adventures (US)	www.volunteeradventures.com			1				1											866-574-8606	
Voluntourism Ltd (UK)	www.responsibletourism.co.uk			1				1											01604 771009	
Wereid Contact (Neth)	www.wereidcontact.nl										1								0343 -53 05 30	
Wildland Adventures (USA)	www.wildland.com			1							1								800-345-4453; 206-365-0686	
Witness for Peace (USA)	www.witnessforpeace.org				1											1			202-547-6112	
World Wide Active (TUI) (Ger)	www.worldwideactive.at	1											1						+43 / 6245 / 77200	
TOTAL	110 ITOS	39	8	43	22	21	31	57	41	25	17	4	34	39	28	21	43	73	80	20

* 15 of the 41 Cultural tour operators offer Community-Based Tourism' products.
+ North America tour operators are based in Canada and / or the United States.

ANNEX



**Selected International Tourist
Arrivals to Inbound Countries**

Asia: Nepal

Top 5 International Tourist Arrivals at Frontiers in Nepal (by nationality in 2006)

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
TOTAL INTERNATIONAL TOURISTS	363,395	463,646	385,297	375,398	383,926	100	100	-2.6	2.3	-3.1
India	117,996	96,995	89,861	95,685	88,857	20.9	23.1	6.5	-7.1	-1.4
Japan	25,402	40,841	24,196	18,239	21,664	8.8	5.6	-24.6	18.8	-10
United Kingdom	23,728	35,080	24,644	24,950	21,180	7.6	5.5	1.2	-15.1	-8.1
United States	23,999	39,377	20,584	18,476	19,039	8.5	5	-10.2	3	-11.4
Germany	32,484	25,907	16,031	14,345	13,686	5.6	3.6	-10.5	-4.6	-10.1

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
Australia	9,395	12,138	9,839	7,093	8,204	2.6	2.1	-27.9	15.7	-6.3
Canada	4,788	7,764	4,783	4,168	4,379	1.7	1.1	-12.9	5.1	-9.1
Germany	32,484	25,907	16,031	14,345	13,686	5.6	3.6	-10.5	-4.6	-10.1
Netherlands	8,487	15,878	11,064	8,890	6,848	3.4	1.8	-19.6	-23	-13.1
Spain	7,104	8,949	11,792	8,896	10,236	1.9	2.7	-24.6	15.1	2.3
United Kingdom	23,728	35,080	24,644	24,950	21,180	7.6	5.5	1.2	-15.1	-8.1
United States	153,139	186,784	267,126	286,871	338,472	22.6	22.5	7.4	18	10.4

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Asia.

Central America: Guatemala

Top 5 International Tourist Arrivals at Frontiers in Guatemala (by nationality in 2006)

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
TOTAL INTERNATIONAL TOURISTS	563,478	826,240	1,181,526	1,315,646	1,502,069	100	100	11.4	14.2	10.5
United States	153,139	186,784	267,126	286,871	338,472	22.6	22.5	7.4	18	10.4
El Salvador	122,532	289,970	411,277	497,430	582,676	35.1	38.8	20.9	17.1	12.3
Mexico	46,323	53,576	67,502	72,908	79,731	6.5	5.3	8	9.4	6.9
Honduras	41,202	51,545	93,975	106,473	122,428	6.2	8.2	13.3	15	15.5
Nicaragua	12,449	16,207	42,876	46,936	36,478	2	2.4	9.5	-22.3	14.5

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
Australia	1,188	2,775	4,783	5,547	4,526	0.3	0.3	16	-18.4	8.5
Canada	17,146	15,915	20,510	24,820	32,268	1.9	2.1	21	30	12.5
Germany	21,854	20,045	21,786	18,258	18,178	2.4	1.2	-16.2	-0.4	-1.6
Netherlands	6,736	11,402	15,080	12,061	13,633	1.4	0.9	-20	13	3
Spain	13,706	18,144	22,824	21,182	22,794	2.2	1.5	-7.2	7.6	3.9
United Kingdom	9,200	10,900	15,955	16,803	21,187	1.3	1.4	5.3	26.1	11.7
United States	153,139	186,784	267,126	286,871	338,472	22.6	22.5	7.4	18	10.4

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Americas.

Central America: Honduras

Top 5 International Tourist Arrivals at Frontiers in Honduras (by nationality in 2006)

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
TOTAL INTERNATIONAL TOURISTS	270,549	470,727	640,981	673,035	738,667	100	100	5.0	9.8	7.8
United States	109,693	150,531	169,692	197,601	228,002	32	30.9	16.4	15.4	7.2
El Salvador	28,065	79,365	137,084	159,546	158,198	16.9	21.4	16.4	-0.8	12.2
Guatemala	18,968	66,924	104,725	92,612	106,063	14.2	14.4	-11.6	14.5	8
Nicaragua	25,413	64,350	98,735	76,646	76,874	13.7	10.4	-22.4	0.3	3
Costa Rica	9,931	15,755	20,740	20,855	23,902	3.3	3.2	0.6	14.6	7.2

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
Australia	733	986	1,222	1,553	1,830	0.2	0.2	27.1	17.8	10.9
Canada	8,265	8,732	10,803	11,002	12,442	1.9	1.7	1.8	13.1	6.1
Germany	6,877	6,283	6,293	7,010	7,988	1.3	1.1	11.4	14	4.1
Netherlands	3,109	3,405	3,294	3,845	4,438	0.7	0.6	16.7	15.4	4.5
Spain	5,223	6,975	7,694	8,536	9,790	1.5	1.3	10.9	14.7	5.8
United Kingdom	4,317	5,372	5,883	6,878	7,989	1.1	1.1	16.9	16.2	6.8
United States	109,693	150,531	169,692	197,601	228,002	32	30.9	16.4	15.4	7.2

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Americas.

Central America: Nicaragua

Top 5 International Tourist Arrivals at Frontiers in Nicaragua (by nationality in 2006)

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
TOTAL INTERNATIONAL TOURISTS	281,254	485,909	614,782	712,444	773,398	100	100	15.9	8.6	8.1
United States	43,327	84,399	131,865	147,331	168,939	17.4	21.8	11.7	14.7	12.3
Honduras	76,201	122,631	126,916	139,134	150,146	25.2	19.4	9.6	7.9	3.4
El Salvador	34,458	69,283	88,103	100,574	113,793	14.3	14.7	14.2	13.1	8.6
Costa Rica	41,881	67,189	99,674	108,598	92,308	13.8	11.9	9	-15	5.4
Guatemala	21,666	36,146	48,990	58,019	67,510	7.4	8.7	18.4	16.4	11

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
Australia	310	676	1,740	2,160		0.1	24.1			
Germany	5,820	5,582	8,549	9,554	10,887	1.1	1.4	11.8	14	11.8
Netherlands	2,051	3,227	4,817	4,819	5,090	0.7	0.7	0	5.6	7.9
Spain	6,409	8,162	9,954	9,612	9,882	1.7	1.3	-3.4	2.8	3.2
United Kingdom	2,457	3,480	6,022	10,889	14,506	0.7	1.9	80.8	33.2	26.9
United States	43,327	84,399	131,865	147,331	168,939	17.4	21.8	11.7	14.7	12.3

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Americas.

South America: Bolivia

Top 5 International Tourist Arrivals at Frontiers in Bolivia (by nationality in 2006)

	1995		2000		2003		2004		2005		Market Share (%)		Growth Rate (%)		Average per year (%)	
											2000	2005	04/03	05/04	2000-2005	
TOTAL INTERNATIONAL TOURISTS	350,687	381,077	367,036	390,888	413,267	100	100	6.5	5.7	1.6						
Peru	56,664	50,162	62,164	68,739	77,380	13.2	18.7	10.6	12.6	9.1						
United States	35,511	44,157	36,801	38,066	37,758	11.6	9.1	3.4	-0.8	-3.1						
Argentina	35,374	43,818	31,242	36,320	41,610	11.5	10.1	16.3	14.6	-1						
Brazil	32,533	24,268	23,810	29,745	32,400	6.4	7.8	24.9	8.9	6						
France	16,145	21,047	24,356	24,416	25,167	5.5	6.1	0.2	3.1	3.6						

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995		2000		2003		2004		2005		Market Share (%)		Growth Rate (%)		Average per year (%)	
											2000	2005	04/03	05/04	2000-2005	
Canada	6,150	7,861	7,429	8,120	8,297	2.1	2	9.3	2.2	1.1						
Germany	24,982	23,583	19,056	19,804	20,308	6.2	4.9	3.9	2.5	-2.9						
Netherlands	10,253	13,930	10,444	9,764	8,625	3.7	2.1	-6.5	-11.7	-9.1						
Spain	9,917	9,609	10,964	12,140	11,974	2.5	2.9	10.7	-1.4	4.5						
United Kingdom	12,705	18,002	20,434	20,616	20,801	4.7	5	0.9	0.9	2.9						
United States	35,511	44,157	36,801	38,066	37,758	11.6	9.1	3.4	-0.8	-3.1						
All Oceania	4,015	7,822	6,125	7,578	8,589	2.1	2.1	23.7	13.3	1.9						

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Americas.

South America: Ecuador

Top 5 International Tourist Arrivals at Frontiers in Ecuador (by nationality in 2006)

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
TOTAL INTERNATIONAL TOURISTS	439,523	627,090	818,927	859,888	840,555	100	100	5.0	-2.2	5.0
United States	95,120	139,333	182,114	206,839	205,077	22.2	24.4	13.6	-0.9	6.7
Colombia	149,166	191,501	179,434	177,700	179,487	30.5	21.4	-1	1	-1.1
Peru	18,170	90,727	191,303	191,048	145,410	14.5	17.3	-0.1	-23.9	8.2
Spain	10,924	13,175	26,669	31,956	36,502	2.1	4.3	19.8	14.2	18.5
Other Europe	16,531	13,693	21,564	23,113	23,220	2.2	2.8	7.2	0.5	9.2

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
Australia	1,641	3,260	4,654	5,549	5,206	0.5	0.6	19.2	-6.2	8.1
Canada	7,909	11,428	15,308	16,428	17,059	1.8	2	7.3	3.8	6.9
Germany	20,073	18,824	19,451	20,809	18,586	3	2.2	7	-10.7	-0.2
Netherlands	5,623	8,377	8,766	9,115	7,875	1.3	0.9	4	-13.6	-1
Spain	10,924	13,175	26,669	31,956	36,502	2.1	4.3	19.8	14.2	18.5
United Kingdom	10,068	16,890	20,867	22,822	22,008	2.7	2.6	9.4	-3.6	4.5
United States	95,120	139,333	182,114	206,839	205,077	22.2	24.4	13.6	-0.9	6.7

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Americas.

South America: Peru

Top 5 International Tourist Arrivals at Frontiers in Peru (by nationality in 2006)

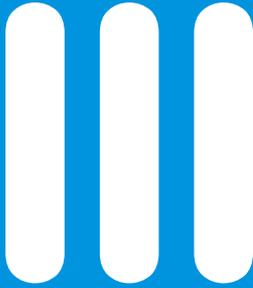
	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
TOTAL INTERNATIONAL TOURISTS	479,231	800,491	1,276,639	1,486,502	1,634,745	100	100	16.4	10.0	12.6
Chile	65,771	134,436	301,024	338,629	415,106	16.8	25.4	12.5	22.6	20.7
United States	102,902	186,004	243,790	293,241	297,317	23.2	18.2	20.3	1.4	8.1
Ecuador	9,351	31,920	110,294	100,808	111,239	4	6.8	-8.6	10.3	23.1
Bolivia	22,540	35,984	65,906	71,718	84,068	4.5	5.1	8.8	17.2	15.2
Argentina	24,653	36,097	46,035	56,232	63,543	4.5	3.9	22.2	13	9.9

Selected Source Countries - International Tourist Arrivals at Frontiers

	1995	2000	2004	2005	2006*	Market Share (%)		Growth Rate (%)		Average per year (%)
						2000	2006*	05/04	06*/05	
Australia	5,226	10,845	16,424	20,225	22,081	1.4	1.4	23.1	9.2	12.6
Canada	11,479	19,418	25,610	33,933	40,007	2.4	2.4	32.5	17.9	12.8
Germany	25,168	30,419	34,846	42,565	42,663	3.8	2.6	22.2	0.2	5.8
Netherlands	6,954	14,895	16,290	17,346	17,681	1.9	1.1	6.5	1.9	2.9
Spain	20,533	24,779	43,023	58,785	62,289	3.1	3.8	36.6	6	16.6
United Kingdom	16,758	33,353	49,396	58,712	59,876	4.2	3.7	18.9	2	10.2
United States	102,902	186,004	243,790	293,241	297,317	23.2	18.2	20.3	1.4	8.1

Source data from United Nations World Tourism Organization (UNWTO), 2007 Market Trends - Americas.

ANNEX



Guide Book Analysis

Guide Book Analysis

Observations

Most commonly included information in the responsible tourism sections of popular guidebooks:

Though the degree of emphasis, and even consistency within the same brand, varies (as discussed below), there were several key pieces of information that guidebook writers typically included in the section on Responsible Tourism:

Definition: Authors usually provided readers with a definition of Eco-, Sustainable, Ethical, Responsible, Community-Based and / or Green tourism, usually with reference to the growing problem of greenwashing.

History: In some cases, authors provided a brief history on the evolution of Eco-, Responsible, etc. tourism within the context of the specific country.

Importance of responsible tourism: The negative impacts of conventional tourism are often outlined, providing readers background knowledge on the importance of cultivating a responsible mindset while traveling.

Practical tips: Suggestions are usually offered to travelers who wish to be mindful of their impacts on the destination's environment, culture, and economy. Some examples of common suggestions:

- Carbon offsetting
- Supporting local business
- Paying a fair price for services
- Using public transport
- Avoiding souvenirs/foods made from endangered species
- Following appropriate dress code
- Asking for permission before taking photographs
- Making an attempt to learn and practice local etiquette

Eco-credential questions: In a few cases, guidebooks provided sample questions for travelers to ask tour operators and hoteliers to assess their commitment to responsible tourism. Examples include:

- Does the tour operator/hotelier employ local residents / pay a fair wage?
- Does the tour operator/hotelier support local community-based tourism initiatives?
- Does the tour operator/hotelier practice 'Leave No Trace' principles (i.e. no litter) when in remote areas?
- Is the tour operator/hotelier registered with any membership organization that requires responsible operations?

Additional resources: The most common information found in sections on Eco-, Responsible, etc. tourism was references to Internet sources and books that explained the concept of Responsible Tourism in-depth. Commonly referenced sources were:

- International Ecotourism Society (TIES)
- Planeta.com

- Tourism Concern
- The Good Alternative Travel Guide by Mark Mann

Volunteer programs: Guidebook authors also commonly encourage readers to give back to the destinations they are visiting by participating in volunteer programs. Suggestions of reputable organizations were often included.

Variability in consistency within brands

Surprisingly, there was a high level of variability in emphasis on responsible tourism within some of the brands examined. This is most likely due to the number of different writers that travel guidebook companies enlist and the varying rigidity of structure that they require their authors to follow. For example:

- Based on our observations, we found that Frommer's travel guidebooks provided information on Responsible Tourism in a very consistent, uniform manner. In the three books examined, a section entitled 'Sustainable Tourism' was featured at the beginning of the guide under Planning Your Trip (to Central America; Peru; Ecuador). Each of these sections highlighted consistently provided the same information and emphasis on sustainable tourism. They also recommended tourism companies and volunteer / study organizations with sustainability credentials in 'The Active Vacation Planner' chapter of each book.
- On the other hand, in the eight Lonely Planet guidebooks examined, information on responsible tourism was not consistently presented. In some cases, there were scattered references to carbon offsetting, indigenous rights, and responsible trekking (e.g. Guatemala, Peru), but their Nepal guidebook had a seven page chapter dedicated to Responsible Tourism and provided a listing of grass-roots sustainable tourism development projects (in addition to sustainable tourism initiatives run by government programs, tour operators, and the lodging industry). In addition, Lonely Planet Nepal had a section dedicated to responsible trekking including porters' rights.

Variability in degree of emphasis between brands

Some brands placed a very strong emphasis on the need for responsible tourism while others were less concerned. For example:

- Moon Travel Guides promoted sustainable tourism enterprises in additions to providing background information about responsible tourism. Also, they urge readers to check various watchdog organizations such as TIES, The Ecuadorian Ecotourism Association, and Planeta.com to see if the tour operators and hoteliers they are considering booking with are registered. In the Peru volume, the author claims to include only agencies and lodges that have a "solid ecotourism ethic." The Nicaragua travel guide placed a particularly high emphasis on supporting community-based enterprises.
- Fodor's books provided the least information on responsible tourism. We were able to search through all four of the books they published to the relevant destinations. Three of them (Central America, South America, Guatemala) showed a similar pattern of providing cursory information about ecotourism (including an incomplete definition, describing ecotourism only as tourism that tries to minimize its impact on the environment) and likening it to nature tourism. In the fourth (Peru), the team could find no mention of eco-, sustainable, green, ethical, or responsible practices in tourism.

Note: A listing of guidebooks for various outbound countries, including Germany, Holland, Spain and the UK can be found in Section 5.3.4.

ANNEX

IV

Resource List

The Resource List Below is not Exhaustive, but Should be Reviewed for Low-Cost Marketing Opportunities.

RESOURCE LIST			
Organization	Website	Mailing /Email Address	Description
Awards			
Colibri Award	http://www.planeta.com/colibri.html	See website	Award to a leading catalyst working toward ecotourism and responsible travel in Mexico
Eco-Club	http://www.ecoclub.com/awards.html	See website	Small awards for small tangible projects judged by dedicated responsible tourism readership
Ecotourism Spotlight Award	www.planeta.wikispaces.com/spotlightaward	www2.planeta.com/contact/index.html	spotlights best website practices by government institutions <i>accepts applications</i>
Energy globe award	http://www.energyglobe.com/en/energy-globe-award/	ENERGY GLOBE Portal, Mühlbach 7 A-4801 Traunkirchen Austria contact@energyglobe.info	Projects are showcased that conserve and protect our resources or that employ renewable energy
Indigenous Tourism and Biodiversity Website Awards	www.planeta.wikispaces.com/itbw	www2.planeta.com/contact/index.html	showcasing best practices in web-based technologies to help indigenous people manage tourism in a biodiversity-friendly way <i>accepts applications</i>
Virgin Holidays Responsible Tourism Awards	www.responsibletravel.com/awards.com/	awards@responsibletravel.com The Galleria Station Road Crawley West Sussex RH10 1WW	recognize individuals, companies and organizations in the travel industry that are making a significant commitment to the culture and economies of local communities and biodiversity conservation
Condé Nast Traveler	www.condenast.com	cnavtraveller@condenast.co.uk	Prestigious Ecotourism awards
Geotourism Challenge	http://geotourism.changemakers.com	See website	High profile ecotourism competition sponsored by National Geographic and Ashoka Changemakers
Skål International Ecotourism Awards	http://www.skål.org/html/ecotourism/I/eco.htm	skål@skål.org	Highlights the best tourism practices around the globe.
TO DO! International Contest on Socially Responsible Tourism	http://www.to-do-contest.org/application.html	info@studienkreis.org	The focus of the criteria of the TO DO! - Contest Socially Responsible Tourism is, among others, on the interests of the local population in the planning and implementation of tourism projects.
Wild Asia Responsible Tourism Award	http://www.wildasia.net/	See website	Wild Asia's Responsible Tourism Awards aims to support the creation of sustainable destination in Asia.

Blogs			
Ecotourism and Sustainable Tourism Blog	www.ecotourism.org/site/c.orLQKXPCLmF/b.5049125/k.F0F4/TIES_Blog.htm	ecodestinatons @ecotourism.org 1301 Clifton Street NW, Suite 200 Washington, DC 20009, USA	The International Ecotourism Society's blog
gloCal Travel	www.blog.glocaltravel.net	info@glocaltravel.net	offers eco, adventure and cultural tours, and eco-friendly accommodation all over Mexico, along with general information and resources for planning responsible travel
Go Green Travel Green	www.gogreentravelgreen.com	gogreentravelgreen@gmail.com	Eco-travel tips, reviews, and news
Greening Tourism	www.greeningtourism.ning.com	See website	Dedicated to finding "best practices" in environmentally -friendly tourism
Harold Goodwin:	www.haroldgoodwin.blogware.com/blog	The International Centre for Responsible Tourism at Leeds Metropolitan University International Faculty Civic Quarter Leeds LS1 3HE United Kingdom	Posts by the Director of the International Centre for Responsible Tourism
Intelligent Travel, a blog of the National Geographic Traveller Magazine	www.blogs.nationalgeographic.com/blogs/intelligenttravel/	traveler@ngs.org 1145 17th St. NW Washington, DC 20036	Posts on cultural, authentic, and sustainable travel
Kathika Travel Website	www.kathika.com	See website	Travel blog with a readership of over 30,000; features travel deals, tips, and popular destinations
Responsibletravel.com's Blog	www.responsibletravel.blogspot.com	amelia@responsibletravel.com	Vacation tips, deals, reviews, and responsible travel news
ResponsibleTravel News.com	www.responsibletravelnews.blogspot.com	newsdesk@responsibletravelnews.com	news resource to highlight the current issues and developments within the field of Responsible Tourism
Save Eco Destinations	www.saveecodestinatons.wordpress.com	See website	Brings attention to the negative impacts of "green" tourism
The Travel Editor	www.thetraveleditor.com	hello@thetraveleditor.com	Online travel guide with pieces written by travel writers, filmmakers, specialists in the arts, etc.
Whole Travel Blog	www.blog.wholetravel.com	info@wholetravel.com	Latest in sustainable travel news

Eco-Lodges			
Lapa Rios Blog (Costa Rica)	www.blog.laparios.com	Lapa Rios, Cabo Matapalo, Osa Peninsula, Costa Rica	News about ecolodge that focuses on wildlife conservation and community development
Outbound Responsible Tour Operators			
Imaginative Traveller	www.imaginative-traveller.com/responsible-travel	1 Betts Avenue Martlesham Heath Ipswich Suffolk IP5 3RH UK	News, events, trips, snippets from tour operations on the ground
Conferences & Trade Shows			
The Business Case for Responsible Tourism (World Travel Market)	www.wtmlondon.com/page.cfm/action=Seminars/SeminarID=22/OSite=10nn6k_1852	Craig Moyes Exhibition Director craig.moyes@reedexpo.co.uk Tel +44 (0)20 8910 7002 Fax +44 (0)20 8334 0668	November 11, 2009, London Topic: securing market advantage from Responsible Tourism through PR and Marketing
Business Travel Show	http://www.businesstravelshow.de/de/default.aspx	Calli Travlos - Event Manager Tel: + 44 (0)20 7970 6741 Mobile: + 44 (0) 7985 545 879 calli.travlos@centaur.co.uk	Opportunity to meet and gain direct contact with corporate travel buyers. 30 Sept 09- Oct.1 09
BC Hospitality Industry Conference and Exposition	http://www.hospitality-trade.com/tradeshow_overview.htm	Nora Cumming, Conference Coordinator Tel: 250.382.3303 ext 204 Fax: 250.383.4142 conference.manager@hospitality-trade.com	Conference focuses on latest trends in the hospitality industry. Nov. 22, 2009-Nov. 24, 2009
Sustainable Tourism 2010 (UK)	http://www.wessex.ac.uk/10-conferences/sustainable-tourism-2010.html	Irene Moreno Millan Sustainable Tourism 2010 Wessex Institute of Technology Tel: 44 (0) 238 0293223 Fax: 44 (0) 238 0292853 imoreno@wessex.ac.uk	Sustainable Tourism 2010 aims to find ways to protect the natural and cultural landscape through the development of new solutions which minimize the adverse effects of tourism. Fourth International Conference on Sustainable Tourism 5 - 7 July 2010
ITB Berlin	http://www1.messe-berlin.de/vip8_1/website/Internet/Internet/www.itb-berlin/englisch/index.html	Messe Berlin GmbH Messedamm 22 D - 14055 Berlin Phone: +49 (0)30 3038-0 Telefax: +49 (0) 30 3038-2325 central@messe-berlin.de	The World's leading travel trade show. Trade Visitors: 10 - 12 March 2010 Trade Visitors and General Public: 13 - 14 March 2010

Vakantiebeurs	www.vakantiebeurs-online.nl/sites/vakbezoekers_vakantiebeurs-online_nl/en/index.asp	Alice Wall Link Communication Manager T. T. 030 - 295 2868 alice.muurlink@vnuexhibitions.com	The main theme of the Holiday 2010 'Meet the locals.'
ARATUR 2009 (Spain)	http://www.feriazaragoza.com/	info@feriazaragoza.com@feriazaragoza.com Tel: (+34) 976 764 700 Fax: (+34) 976 330 649	Spain's leading trade fair for Travel & Tourism industry market. Oct 1, 2009
International Conference on Responsible Tourism in Destinations	www.responsibletourism2008.org/	Department of Tourism, Government of Kerala Park View, Trivandrum, Kerala, India - 695 033	Third Annual, May 2009, Belize
Discussion Forum Sites			
Care2.com – Responsible Travel Group	www.care2.com/c2c/group/ecotourism	ecotourism@groups.care2.com	
International Ecotourism Club	www.ecoclub.com/c/index.php?	http://zazachat.zazasoftware.com/livechatclient/ZaZaTicketsVisitor.aspx?ms=&sent=0&zazac=9039&time=4/30/2009%202:13:41%20PM	Forums range from ecotourism news to careers, businesses, education, etc.
Irresponsible tourism.info	www.irresponsibletourism.info	info@irresponsibletourism.info	Forum discussing irresponsible practices within tourism
Planeta.com	www.forum.planeta.com	http://www2.planeta.com/contact/index.html	Discussion on a wide range of topics pertaining to responsible tourism
Responsible Tourism Forum	www.artforum.info/	See website	Discussion on a wide range of topics pertaining to responsible tourism
Thorn Tree Travel Forum	www.lonelyplanet.com/thorntree	See Website	Forum in which the Lonely Planet travel community exchanges travel information, advice, hints and tips
WAYN	www.wayn.com	See website	Social networking forum centered around leisure travel
Eco-Portal Sites			
EarthFoot	www.Earthfoot.org	george@earthfoot.org	Lists small-scale, low impact ecotours
EcoTourism Vacations on Orbitz.com	www.eco.orbitz.com	Orbitz Worldwide, Inc. 500 W. Madison Chicago, Illinois 60661 USA	Lists green hotels, carbon-offsetting programs, hybrid car rentals, voluntourism opportunities, etc.
EcoTour	www.ecotourdirectory.com/	karen@ecotourdirectory.com	Lists ecotour operators that have a demonstrable commitment to responsible tourism

EcoTour	www.ecotourdirectory.com/	karen@ecotour directory.com	Lists ecotour operators that have a demonstrable commitment to responsible tourism
Ecoturismolatino.com	www.ecoturismolatino.com	www.ecoturismolatino.com/esp/eco viajeros/contacta/contactanos.htm	A guide for ecotourism to protected areas in Latin America
"Green" Hotels Association	www.greenhotels.com	P. O. Box 420212 Houston, TX 77242-0212 USA	Listing of ecologically-conscious hotels
Green Hotels on Expedia.com	www.expedia.com/daily/sustainable_travel/going_green/green_hotels.asp	333 108th Avenue NE Bellevue, WA 98004	Expedia: largest online wholesale, this section of their website lists green hotels according to a rating system
Green Travel Market	www.greentravelmarket.info	Minahassastraat 1 1094 RS Amsterdam The Netherlands	Business to Business listing of responsible operators.
iStayGreen.org	www.istaygreen.org/	iStayGreen.org 27994 North 96th Drive Peoria, Arizona 85383 USA	Listings and bookings of environmentally friendly lodging
Rainforest Alliance's Eco-Index	www.eco-indextourism.org/en/add	665 Broadway, Suite 500 New York, NY 10012 USA	portal for certified tourism businesses in Latin America
Responsible Travel Portal- Featured Responsible Travel Programs and Ecotours	www.transitionsabroad.com/listings/travel/responsible/resources.shtml#responsible_travel_programs	www.transitionsabroad.com/advertise/add_free_program_listing.shtml	Transitions Abroad is a magazine dedicated to work, study, living, and cultural immersion travel abroad; portal features responsible travel programs
Rezhub.com	www.rezhub.com/greentravel	RezHub, Inc 2003 McCoy Road Suite C Orlando, FL 32809 USA	Lists green hotels, hybrid rental car companies, carbon offsetting, etc.
StepUp Travel	www.stepuptravel.org	See Website	Lists small, responsible, unique activities and accommodations
Sustainable Travel International's Eco-Directory	www.sustainabletravelinternational.org/green/sti_membership/search	Sustainable Travel International 835 SW Williams Drive White Salmon, WA 98672 USA	directory of STI member companies
Travelers' Philanthropy	www.travelersphilanthropy.org	Center for Responsible Travel (CREST) 1333 H St., NW Suite 300E Washington, DC 20005 USA	Online portal of companies and their travelers' philanthropy projects which can accept tax deductible donations
Whole Travel	www.wholetravel.com	suppliers@whole travel.com	Search and booking portal for sustainable accommodations

International NGO's			
Center for Responsible Travel (CREST)	www.responsibletravel.org and www.travelersphilanthropy.org	info@responsibletravel.org 1333 H Street NW, Washington DC 20005	Insert Description Here
Friends of World Heritage	www.friendsofworldheritage.org	worldheritage@unfoundation.org	Raises awareness about the importance of protecting World Heritage and
International Centre for Responsible Tourism	www.icrtourism.org/	The International Centre for Responsible Tourism at Leeds Metropolitan University International Faculty Civic Quarter Leeds LS1 3HE United Kingdom	Conducts research and development work in the areas of responsible tourism and hospitality
International Ecotourism Society	www.ecotourism.org	1301 Clifton Street NW, Suite 200 Washington, DC 20009, USA	US-based, largest and oldest ecotourism organization in the world dedicated to generating and disseminating information about ecotourism
Pro-Poor Tourism Partnership	www.propoortourism.org.uk/	info@propoortourism.org.uk	Provides information on tourism that results in increased net benefits for poor people
Rainforest Alliance (Sustainable Tourism Program)	www.rainforest-alliance.org/tourism.cfm?id=main	665 Broadway, Suite 500 New York, NY 10012 USA	US-based NGO, promotes sustainable tourism through toolkits, handbooks, training and technical assistance, and certification programs
Responsible Tourism Partnership	www.responsibletourismpartnership.org	www.responsibletourismpartnership.org/contact.asp	works in conjunction with other organizations to improve destinations for local people and their visitors
Sustainable Travel International	www.sustainabletravelinternational.org	Sustainable Travel International 835 SW Williams Drive White Salmon, WA 98672 USA	US-based NGO, promotes sustainable tourism through carbon offsetting programs, fair trade in tourism, travel philanthropy, etc.
Tourism Concern	www.tourismconcern.org.uk/	Stapleton House 277-281 Holloway Road London N7 8HN	UK-based membership organization campaigning on ethical and fairly traded tourism
World Travel Market- World Responsible Tourism Day	www.wtmwrtd.com/	wtmwrtd@janelarcombecommunications.com	Wed. November 11, 2009; Travel industry's largest expo; London

Magazines

Travel + Leisure - Responsible Travel Section	www.travelandleisure.com/responsibletravel/	Travel + Leisure Magazine 1120 Avenue of the Americas, 10th Floor, New York, NY 10036	Features responsible tourism operators, accommodations, and articles on the topic
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Adventure Tourism

Adventure Travel Magazine	www.atmagazine.co.uk	PO Box 6254 Alcester Warwickshire UK B49 6PF	UK-based magazine
Backpacker Magazine	www.backpacker.com	www.backpacker.com/contact_us/	US-based source for outdoor skills information and advice, and destinations for backpacking, camping, hiking, etc.
Bild	www.bild.de	www.bild.de/BTO/kddb,templateId=kddbContact.html	German- based adventure travel magazine
Daily Telegraph (travel section)	www.telegraph.co.uk/travel/	www.telegraph.co.uk/topics/about-us/form/	UK-based news publication
Faz Frankfurter Allgemeine Zeitung	www.faz.net	www.faz.net/s/RubA25ECC7CBC45419BBC708836C520FFCD/Doc~ED1E5BB5E09BA4929A9EFE3742FC012DA~ATpl~Ecommon~Sform.html	German-based news publication
National Geographic Adventure	www.adventure.nationalgeographic.com	National Geographic Adventure Editorial 104 West 40th Street New York, New York 10018	US-based magazine on adventure travel
Outdoor Australia	www.outdoorausalia.typepad.com	ebowen@acpmagazines.com.au	Australian-based resource for outdoor enthusiasts
The Sun (travel section)	www.thesun.co.uk/sol/homepage/travel/	talkback@the-sun.co.uk	UK-based news publication
USA Today (travel section)	www.usatoday.com/travel/default.htm	http://feedbackforms.usatoday.com/marketing/feedback/feedback-online.aspx?type=14 USA TODAY/ USATODAY.com 7950 Jones Branch Drive McLean, VA 22108-0605	US-based news publication
Wanderlust	www.wanderlust.co.uk/	info@wanderlust.co.uk Wanderlust Magazine PO Box 1832 Windsor Berkshire SL4 1YT UK	UK-based travel magazine

Nature Tourism

BBC Wildlife Magazine	www.bbcwildlifemagazine.com	wildlifemagazine@bbcmagazinesbristol.com BBC Wildlife Magazine BBC Magazines Bristol 14th Floor Tower House Fairfax Street Bristol BS1 3BN	reputable natural history magazine based in UK, features articles on wildlife travel
Camera Natura	www.cameranatura.se	info@camera.natura.se Camera Natura Förlag AB Torggatan 4 722 15 Västerås	Swedish magazine on nature photography; features articles on wildlife travel
Ecologist Magazine	www.theecologist.org	ecosystems@theecologist.org 102 D Lana House Studios 116 - 118 Commercial Street Spitalfields London E1 6NF	British magazine on environmental affairs; features articles on wildlife travel
Geographical Magazine	www.geographical.co.uk	info@geographical.co.uk Geographical magazine, Circle Publishing, One Victoria Villas, Richmond, Surrey TW9 2GW	official magazine of the Royal Geographical Society; content covers culture, wildlife, exploration, & adventure
Grasduinen	www.grasduinen.nl	Postbus 23289, 1100 DT Amsterdam Nederland	Dutch flora and fauna magazine; features articles on wildlife travel
Naturblick	www.scherbuk.de	www.scherbuk.de/index.php?id=6 Haubachweg 16 40625 Düsseldorf	German magazine on travel and nature photography
Quercus	www.quercus.es	www.quercus.es/enviar-noticia.asp?noti=2869&pag=noticia Editorial América Ibérica c/ Miguel Yuste, 33 bis 28037 Madrid	Spanish magazine on nature travel
Rainforests Magazine	www.naturealert.org	sw@naturealert.org PO Box 3830, Bath BA1 3WX England	British magazine features articles on wildlife, people, environment, travel
Travel with a Challenge Magazine	www.travelwithachallenge.com	alison@travelwithachallenge.com	Articles on family vacations, cultures and countries, cruise and train travel, nature and wildlife holidays suitable for mature travelers

Vår Fågelvärld	www.sofnet.org	webmaster@sofnet.org	Swedish magazine on birds and bird watching
Verträglich Reisen	www.vertraeglich-reisen.eu	redaktion@fairkehr.de fairkehr GmbH Niebuhrstr. 16b 53113 Bonn Germany	German magazine on environmentally -friendly travel
Wildlife Extra	www.wildlifeextra.com	mailto:editor@wildlifeextra.com? subject=Wildlife%20News Wildlife Extra Mill House, Brinsop, Hereford, HR4 7AX, England	British magazine on wildlife watching
Open-Source Mapping Technology			
Google Earth	www.earth.google.com/	See website	Web-based maps that feature user generated content (photos & videos linked to places)
Google Maps	www.maps.google.com	See website	Web-based maps that feature user generated content (photos & videos linked to places)
Travel Booking Sites			
Responsibletravel.com	www.responsibletravel.com/		Links up travelers and responsible tour operators/accomodations
TripAdvisor.com	www.TripAdvisor.com	www.tripadvisor.com/MediaKit/TripAdvisor LLC, 141 Needham Street, Newton, MA 02464 USA	Provides recommendations for hotels, resorts, inns, vacations, travel packages, vacation packages, travel guides and more
TravelMuse.com	www.travelmuse.com	Info@travelmuse.com 4410 El Camino Real, Suite 102 Los Altos, CA 94022 USA	Travel planning guide – bookings, tips, & reviews (by professionals and users)
Travelers' Philanthropy Sites			
Center for Responsible Travel	www.travelersphilanthropy.org	1333 H Street, NW, suite 300, Washington DC 20005	Travelers' Philanthropy resource center; giving portal for guest donations to local projects
Travaid	www.travaid.org	See website	defines and screens social and environmental projects; facilitates online donations
Travel Resource Sites			
Big Volcano Ecotourism Resource Centre	www.bigvolcano.com.au/ercentre/ercpage.htm	See Website	resources for students, academics, operators, stakeholders and travelers interested in ecotourism
Ecoclub.com (International Ecotourism Club)	www.ecoclub.com	http://www.ecoclub.com/advertise.html ("Questions" button in middle of page)	award-winning membership network for Ecological Tourism

Planeta.com	www.planeta.com/	http://www2.planeta.com/contact/index.html	award-winning website provides free access to more than 10,000 pages of articles and resource guides as well as an active forum and wiki
Savvytraveller.ca	www.savvytraveller.ca/	savvytraveller.ca/contact	provides travelers with information ranging from travel insurance to cost-saving advice
TravelMole	www.travelmole.com	TravelMole 145-157 St John Street, 2nd Floor, London, EC1V 4PY	largest global online community for the Travel and Tourism Industry; has a strong responsible tourism column.

Ratings & Review Sites

Holidays Uncovered	www.holidays-uncovered.co.uk/	www.holidays-uncovered.co.uk/feedback.html	one of the leading holiday review sites in the UK (over 100,000 reviews)
ResponsibleTravel.com	www.responsibletravel.com/copy/Copy900003.htm	kate@responsibletravel.com	travel agent website that provides access to independent, unedited holiday reviews
Uptake.com	www.uptake.com	feedback@uptake.com 654 High Street Suite 220 Palo Alto, CA 94301	travel search and discovery site – synthesizes over 20 million ratings and reviews of

Wiki

The Good Tourism Wiki	www.good-tourism.com	See Website	knowledge bank of updated theory, agreements & declarations, reports & guides, best practices, useful links and multimedia resources related to sustainable tourism and responsible travel
Trip Advisor Inside	www.tripadvisor.com/TravelHome	TripAdvisor LLC, 141 Needham Street, Newton, MA 02464 USA	destination guides written and continuously edited by users
	Nepal	www.tripadvisor.com/Travel-g293889-s1/Nepal:Inside.html	""
	Guatemala	www.tripadvisor.com/Travel-g292002-s1/Guatemala:Inside.html	""
	Honduras	www.tripadvisor.com/Travel-g292016-s1/Honduras:Inside.html	""
	Nicaragua	tripadvisor.com/Travel-g294477-s1/Nicaragua:Inside.html	""
	Bolivia	tripadvisor.com/Travel-g294071-s1/Bolivia:Inside.html	""
	Ecuador	tripadvisor.com/Travel-g294307-s1/Ecuador:Inside.html	""
	Peru	tripadvisor.com/Travel-g294311-s1/Peru:Inside.html	""

ANNEX

V

**About the Center for
Responsible Travel (CREST)
and the Research Team**

About the Center for Responsible Travel (CREST) and the Research Team

About the Center for Responsible Travel (CREST)

The Center for Responsible Travel (formerly the Center on Ecotourism and Sustainable Development (CESD)) is a unique non-profit multi-disciplinary research institute devoted to increasing the positive global impact of responsible tourism. CREST functions as a bi-coastal institute, with offices at Stanford University and Washington, DC. Recognizing responsible tourism's potential as a tool for poverty alleviation and biodiversity conservation, CREST's mission is to use policy-oriented research to design, monitor, evaluate, and improve ecotourism, while promoting sustainable practices and principles within the wider tourism industry.



The Center was founded in 2003 by two pioneers in the field of ecotourism who saw a critical need for intellectual rigor behind the responsible and ecotourism movements. Dr. William Durham, professor of Anthropology at Stanford University, and Dr. Martha Honey, author and then-director of The International Ecotourism Society, met at a Stanford event, agreed on the need for a new approach, and launched CREST shortly thereafter.

CREST's programmatic and research areas include coastal tourism development, indigenous rights and tourism, certification for tourism businesses, travelers' philanthropy, impacts of cruise tourism, and research on market trends in the broader tourism industry.

CREST views ecotourism as a development and conservation tool that has the potential to address some of the most complex and compelling social and natural conservation issues of our times. Among the questions CREST addresses through its research and field projects are:

- How can we decrease the negative social and environmental impacts of tourism?
- How can tourism truly contribute to the survival of endangered flora and fauna?
- How can tourism help to empower local communities and alleviate poverty?
- How can tourism facilitate cross-cultural learning, while diminishing the exploitation of host populations?
- How can we build tourism businesses that are environmentally responsible, socially beneficial, and profitable?

In essence, CREST seeks to *transform the way the world travels*.

About the Research Team

David Krantz and Gayle Chong were the lead researchers/writers for this report. They received tremendous support from the rest of the team, including major research, writing, and editing contributions.

David Krantz, MTA, is CESD's Washington Coordinator and leads a variety of the center's projects and research. Krantz's background includes work as an international trade paralegal, in hospitality management at a DC hotel, and over two years of experience in adventure and ecotourism in the developing world as he backpacked and volunteered his way through South America, Eastern Europe, and Southern and Eastern Africa. Prior to joining CESD, David coordinated environmental conservation initiatives in the tourism industry with Conservation International's Center for Environmental Leadership in Business. He holds a Masters of Tourism Administration from the George Washington University, and is fluent in Spanish.

Gayle Chong, MES, is a private consultant based in Toronto, Canada. She has worked on a variety of projects with CREST. Many of her current projects are in market research, and environmental and sustainable development research. She has a wide range of experience working in Canadian government, NGOs, and the private sector. She earned her Masters of Environmental Studies from York University (Toronto) in 2007, where she focused on the conservation of ecosystem services and ecosystem management and holds an Hon.B.Sc. from University of Toronto in Molecular Biology. Her international experiences include working as a sustainable fisheries consultant in Malawi, conducting her graduate research in Costa Rica, and travelling throughout Asia and southern Africa.

Johanna Contreras interned with the CREST as a researcher for this report during the spring semester 2009. She completed her bachelor's degree at the University of Illinois at Urbana-Champaign, where she studied Recreation, Sport, and Tourism with an emphasis on Tourism Management. She has studied tourism development in Poland, Costa Rica, and the Philippines, and her main research interests are community empowerment, indigenous rights, poverty alleviation and capacity building.

William Durham, Ph.D., is CREST's Director at Stanford. He is the Bing Professor in Human Biology, and the Yang and Yamazaki University Fellow, in the Woods Institute for the Environment and the Anthropology Department. Author of *Scarcity and Survival in Central America* (Stanford 1981), and co-editor of *Social Causes of Environmental Destruction in Latin America* (Michigan, 1995), Durham has particular interest in ecotourism as a means to address conservation and development issues in Central America, the Amazon Rain Forest, and Galapagos. His most recent CESD publication is *Ecotourism and Conservation in the Americas*, Durham and Stronza, Eds., CABI Press, 2008.

Pilar (Pitu) Espeso, MA is Director of International Development Projects for e-Cultura.net, based in Spain. She has worked in hotel operations, tourism planning and tourism development in such entities as Disneyland Paris and Park Lane Hilton (London). She has also conducted industry-focused research on behalf of the International Association of Conference Centers (IACC) and the market research firm, MINTEL. Her fluency in five different languages has enabled her to live and work in diverse countries. Espeso has worked in operations analysis at Lao Pako Ecolodge in Laos, and in cultural heritage tourism in Weishan, China. Espeso has collaborated with the US National Park Service, the American Museum of Natural History, Tourism Development International and many other international organizations with projects in America, Asia and Europe. Her latest projects include leading the 2nd Latin American Meeting of Cultural Heritage Tourism in La Antigua, Guatemala, and helping develop the Cultural Tourism Strategic Plan for Brasov, Romania. Espeso has an MS degree in Tourism and Travel Management with a focus on Tourism Planning and Development from New York University.

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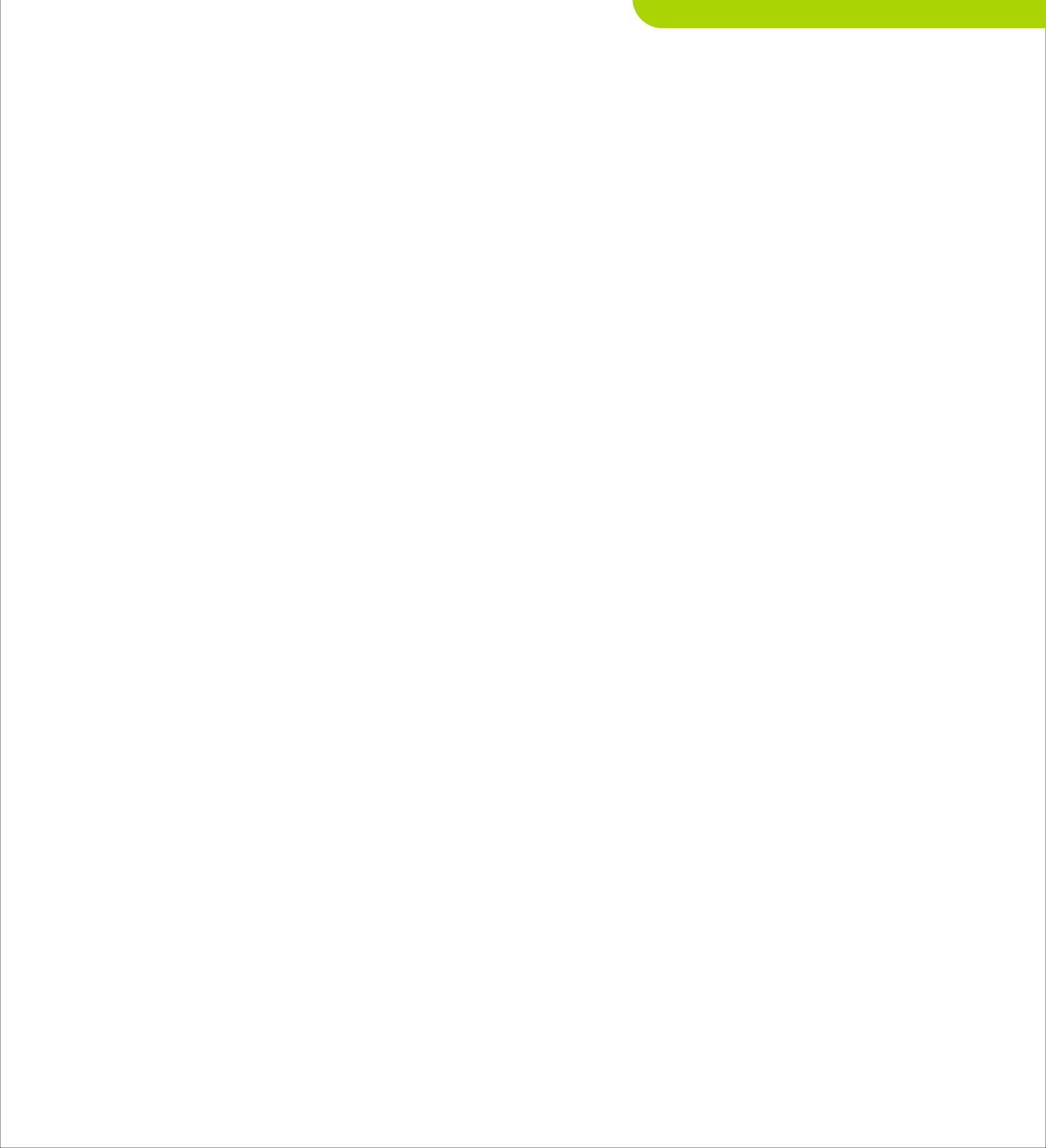
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