EARTH
European Alliance for
Responsible Tourism and Hospitality

Request for a European study on the demand site of sustainable and responsible tourism

EARTH and the undersigned organizations call upon European institutions to launch a study at the European level, which will measure sustainable consumption and consumer expectations in regards to the sustainable and responsible tourism sector. This study will foster market opportunities, the identification of potential innovations for the supply chain and will increase the competitiveness of tourism operators.

Tourism stakeholders (European networks, SMEs, associations, NGOs, consulting firms, associations, foundations etc...) are urging for the creation of clear and common responsible and sustainable tourism indicators that should be included in the official statistics of each country and also at the European level.

A. Societal trends and opportunities…

- **Evolution of the modes of consumption**

European societies are experiencing two major changes in consumption patterns. **1/** Firstly, the expansion of Information and communications technologies (ICTs) and collaborative communication, promotion with a bottom-up dynamism and the sharing of consumer's experience in which sustainability and responsibility criteria are starting to play an important role. **2/** Secondly, consumers prefer high quality and yet short term tourism products. Consumers also have a tendency to search for authentic experiences.

- **Emerging market opportunities**

Changes in consumer consumption patterns and expectations provides opportunities for development and growth, through promoting and marketing of new local, national and international tourism products, rethinking existing designs and generating profitable tourism projects (or ideas) that are economically, socially and environmentally sustainable. These new aspirations and requirements have caused consumers to demand higher quality tourism products and services when visiting their preferred holiday destinations. This increase in quality standards allows tourism operators to gain a new perspective especially in the sustainable tourism sector, which provides opportunities for innovation, growth and improvement of services and tourist destinations

- **Development of the domestic European market**

The rise of globalization has had a direct influence on travel and tourism as the tourism market has been reliant and sensitive to economic fluctuations, political events and/or environmental changes that have become common in our new globalized world. As a result, promotion of tourism between Member States through the development of tourism products and policies will encourage an increased and permanent flow of tourists. This flow will then positively affect European tour operators and destinations who will benefit from a reliable and regular income. The European market still has many opportunities to develop domestic tourism in regards of the number of Europeans that do not go on holidays.

Furthermore, growth in domestic tourism may also contribute to the temperance of global warming due to the decrease in transoceanic travels. Domestic tourism encourages the development of alternative transport choices with lower environmental impacts such as public transport (railways, coaches) or cycling. As a result, focusing on the domestic sector will simultaneously support European tourism and also promote the responsible behavior of consumers.

- **Responsible tourism, an alternative to seasonal tourism**

Responsible tourism fights against the spatial and temporal concentration of tourists and has presented itself as a real alternative to seasonal tourism. Sustainable and responsible tourism products are based on human factors, such as exchange, sharing and culture, and can be realized during all seasons of the year. Seniors[1], who will represent 30% of the European population by 2060, would be one of the key target groups – with less or no time constraints – to potentially purchase these types of tourism products that offer responsible and sustainable destinations during the off-season or low-season.

- **Inclusive tourism: ensuring equal access (accessibility) and encouraging participation of certain social groups (social tourism)**

The accessibility of tourism products is at the heart of European and national policies and is considered as a top priority by many governments. However, it is still considered a constraint by many tour operators, hotels, restaurants and service providers as 15% of the world population would require specific attention due to physical or mental disabilities – this market, far to be a niche - is part of the principles of sustainable and responsible tourism.

Encouraging the participation of those in tourism who cannot go on a holiday due to financial, social or other constraints is included in responsible tourism.

- **A transversal collaboration among European actors, regions and destinations**

Transnational and transregional collaborations between European actors, regions and destinations will not only create networks and connections between culture and tourism but also join together different authorities in the public and private sector in an effort to develop and sell local and authentic tourism experiences. This local aspect in tourism has become increasingly demanded by consumers who wish to delve deeper into the cultures and communities that they are visiting.

- **Governance for all**

The emergence of new forms of governance encourages tourism stakeholders to include more values coming from the Corporate Social Responsibility (CSR) in order to manage tourist products and services in more responsible and sustainable way. Relatively new ways to do business (such as social entrepreneurship) are affecting all the sectors starting from the private to the public sector at all local, national and European levels.

- **Avoiding waste in tourism**

New campaigns and tendencies are emerging in order to avoid waste in the tourism sector. Many restaurants, hotels and other tourism establishments have begun to implement new projects, such as

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[1] People of 55 year old and over

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recycling and reusing their waste, in order to be more sustainable and auto-sufficient. This new trend could be reinforced into the principles of the Cooperate Social Responsibility (CSR) because the purpose is to create a virtuous circle of the tourism product and cycle of life.

B. In a context of global concern calling for urgent measures...

The patterns mentioned above are part of a global context concern.

Indeed, the confirmed crumbling of mass tourism and its negative impacts in many parts of Europe in a global competitive environment encourages and forces tourism stakeholders to rethink their offer.

In addition, methods and tools used by tourism stakeholders and tourism public institutions are often unsuited to the development and the evolution of the sector. Many SMEs and public institutions have failed to adapt themselves to the rapid changes and the growing impacts and use of new technologies.

Furthermore, there is a lack of consideration of economic dynamics in tourism by public authorities and a lack of commitment towards the integration of sustainable tourism in the tourism policies. Climate change affects all sectors of the economy, in which tourism is playing an important role, as the transport sector contributes to 5 % of the total emissions of greenhouse gases in the world. The reports, researches and studies regarding the negative impacts on natural and cultural heritage are increasingly and are becoming more and more pessimistic and worrying.

In addition, the Westernization of the world has attributed to a general loss of European cultural diversity.

The economic downturn has forced many Europeans to cancel their holiday plans, increasing the amount of Europeans that stay within their homes and regions during the holidays.

C. Problems of the professionals in this context

Actors of sustainable tourism noted a serious lack of figures and data on the actual sustainable consumption at a European level and on the expectations of actual or potential consumers. The European Union presents Europe as a single destination and promotes collaboration between the different actors and organizations at European level. The European Commission supports sustainable and responsible tourism through its policies that have been clearly expressed in the 2007 Agenda and in the 2010 Communication "Europe, the world's No 1 tourist destination, a new political framework for tourism in Europe".

However, professionals of this sector have consistently voiced their concern regarding the lack of data on the behavior and expectations of tourists/consumers. "The general feeling, the impression, the current trend" are expressions that people use when they talk about sustainable tourism. Nevertheless, current trends demonstrate that there has been an increased consumer demand towards a local and sustainable tourism experience as tourists have become more aware of the fragility of the environment and also of the negative impacts that mass tourism inflicts on the social, cultural and economic factors of a region. EARTH recognizes the European Commission's efforts to

develop tools and measures, such as the Indicator System for Sustainable Tourism at a Destination Level (ETIS), however EARTH believes that the next step is to look at the demand side of the chain.

No study has been conducted at the European level to measure the impact and importance of sustainable and responsible tourism for European tourists. Studies exist in some European countries but the data must be amassed into one database so that interested stakeholders can compare, contrast and draw conclusions from the study.

Tourism professionals need key data, clear figures and numbers on the expectations of tourists / visitors regarding the aspects of sustainability and responsibility. They need to know their influence on consumers, at the moment of buying tourism products, booking the hotel, choosing a destination etc.

A potential study can be used to develop new products, to support innovation to promote new business models and is especially useful for creation of SMEs.

D. Proposal of study

The study in practice:

Who?

Respondents in the survey (target groups)

- tourists and visitors

The beneficiaries of this study:

- Tourism stakeholders and actors of the tourism sector especially SMEs which do not have the financial resources to conduct the study themselves such as tour operators, restaurants, hotels, transport sector, hand-crafts, tourism consultants, professional associations.
- Managers and public authorities in charge of sites, monuments and destinations.
- Non-governmental bodies running tourism programs.
- Tourists since they get familiar with a "new" perspective, their preferences win definition, their attention is called to Responsibility and Sustainability.

The keys areas of the study :

The signatory organizations have decide to include in the proposal all the types of tourism that are linked with **sustainability and responsibility** as the customer is often not very aware of the differences among all the definitions.

Responsible tourism: "Responsible tourism complies with the principles of social and economic justice and exerts full respect towards the environment and its cultures. It recognizes the centrality of the local host community and its right to act as a protagonist in developing a sustainable and responsible tourism. Responsible tourism actuates to foster a positive interaction between the tourist industry, the local communities and the travelers", defined by AITR's members in 2005.

Sustainable tourism: "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" by the UNWTO.

Fair trade in tourism : "Fair Trade in Tourism is a key aspect of sustainable tourism. It aims to maximize the benefits from tourism for local destination stakeholders through mutually beneficial and equitable partnerships between national and international tourism stakeholders in the destination. It also supports the right of indigenous host communities, whether involved in tourism or not, to participate as equal stakeholders and beneficiaries in the tourism development process", definition by Tourism Concern.

Ecotourism : Ecotourism is defined as "responsible travel to natural areas that conserves the environment and improves the well-being of local people" by the International Ecotourism Society TIES, 1990.

Rural and Community-based tourism: "Community tourism (sometimes called community-based tourism) is a form of tourism which aims to include and benefit local communities, particularly indigenous peoples and villagers in the rural South (i.e. 'developing world'). For instance, villagers might host tourists in their village, managing the scheme communally and sharing the profits. There are many types of community tourism project, including many in which the 'community' works with a commercial tour operator, but all community tourism projects should give local people a fair share of the benefits/profits and a say in deciding how incoming tourism is managed.", defined by Tourism Concern.

Social tourism : social tourism is "all of the relationships and phenomena resulting from participation in tourism, and in particular from the participation of social strata with modest incomes. This participation is made possible, or facilitated, by measures of a well-defined social nature" defined by International Social Tourism Organization (ISTO).

Accessible Tourism: is tourism and travel that is accessible to all people, with disabilities or not, including those with mobility, hearing, sight, cognitive, or intellectual and psychosocial disabilities, older persons and those with temporary disabilities (Takayama Declaration - Appendix, UNESCAP, 2009).
Inclusive tourism: tourists who need good access, e.g. seniors, people with disabilities and families with small children, need sufficient attention from tourism suppliers. Due to the demographic ageing, more and more travelers will need good access conditions.

Questions raised:

1. **What is the understanding of sustainable tourism of the European consumers ?**

- Selection of Keywords for a tourism product? For a Hotel? For a destination?
- Proposed definition and classification of key values (environmental dimension, social, cultural, economic)
- What types of activities are sustainable / responsible / fair for the European consumer

2. **Measure of sustainable tourism consumption in Europe:**

- <u>How many European consumers have consumed services and / or sustainable travel? Demographic data of tourists using sustainable services, travels.</u>
- What services (activity, travel, stay ...)? Where? International, national, European level?
- Main motivation to consume sustainable and responsible (ethical reason, appreciation of the product...)

- <u>What reasons stop European consumers to purchase sustainable tourism products?</u> (Visibility, negative image, lack of knowledge of this type of tourism, too expensive....)

- <u>What is the major asset, advantage of responsible product for European consumers?</u>

3.   Measure of the consumer confidence toward a sustainable, responsible tourism product

- Does sustainable tourism labels influence the consumer in her / his choice of a destination, service? Does it reassure the consumer?
- If there is a lack of trust: why?

4.   Measure of the potential growth of responsible, sustainable tourism products

- Collection of several studies regarding the average budget ready to be spent for responsible, sustainable tourism product
- Moral and ethical priorities of a potential or present sustainable consumption of the consumer (environmental, social, cultural, economic)
- Search of originality
- Expected products and services specially concerning the quality
- Ways used to buy sustainable, responsible tourism products (internet, travel agency, fair tourism exhibitions...)
- Measures of influences of consumption habits (mouth to ear, labels, advertising, internet search)