



Center for Responsible Travel

*Transforming the Way the World Travels*

# The Case for Responsible Travel: Trends & Statistics 2019

Challenging and exciting times lie ahead for travel and tourism. The United Nations World Tourism Organization (UNWTO) estimates that international tourist arrivals worldwide increased 6% in 2018, hitting 1.4 billion.<sup>1</sup> Thanks to strong growth in arrivals since 2010, this milestone was reached *two years* ahead of projection in the UNWTO's long-term forecast.<sup>2</sup> While more moderate growth in international tourist arrivals is expected in 2019, it is clear that travel is booming.

The World Travel & Tourism Council (WTTC) reports that in 2018, the travel and tourism sector supported 319 million jobs – 10% of total employment – and generated 10.4% of global GDP.<sup>3</sup>

An East Carolina University study found the top five most important world tourism issues for 2020 will include:

1. Maintaining a destination's economic, social/cultural, natural, and built resources
2. Global concerns for safety and security
3. Impact on tourism from global economic, social/cultural, and political change
4. Responding to the long-term impacts of overtourism, climate change, and global warming
5. Necessity for increased multi-level leadership in tourism policy and strategic planning<sup>4</sup>

The travel and tourism sector remains a critical player in positive triple bottom line impacts<sup>5</sup> (people, planet, and profit), but it can also do a great deal of harm. When it comes to tourism's impact on the environment from climate change, overtourism, overdevelopment, and poor development, there is no more time to waste. We, as an industry, must come together and act now as we never have before to ensure we are part of the solution for our planet and its people. We are at a tipping point. Responsible, ethical, and sustainable travel can no longer be a niche or a luxury, but rather the rallying cry for the entire industry – from the smallest independent operators to the largest companies. Travel is a privilege that comes with great responsibility from the sides of the destination, the company, and the traveler.

The good news is that we have the knowledge and tools to make this a reality. Tremendous headway has been made as destinations, companies, and organizations are taking it a step beyond even admirable responsible tourism experiences to support important community and environmental projects where they operate. Increasing numbers of travelers are supporting local businesses and sustainable activities. This year's *Trends & Statistics* report highlights not only the latest consumer, destination, and business data in the context of responsible tourism but also impact tourism programs that contribute to destination conservation and resiliency.

## Key Terms in Impact Tourism

KEY TERM	DEFINITION
<b>Impact Tourism</b>	Tourism that makes strategic contributions of time, talent, and treasure to social and environmental projects in destinations. This includes tourism businesses, travelers, and organizations in partnerships with host communities. Impact tourism is not about collecting loose change for charities; rather it is about integrating business and visitor support for local communities into the core definition of responsible travel. <sup>6</sup>
<b>Social Impact</b>	A significant, positive change that addresses a pressing social challenge. <sup>7</sup>
<b>Corporate Social Responsibility</b>	A self-regulating business model that helps a company be socially accountable to itself, its stakeholders, and the public, by being conscious of the kind of impact it is having on all aspects of society including economic, social, and environmental. <sup>8</sup>
<b>Sustainable Tourism</b>	Tourism that leads to the management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biodiversity, and life-support systems. <sup>9</sup>
<b>Responsible Tourism</b>	Tourism that maximizes the benefits to local communities, minimizes negative social or environmental impacts, and helps local people conserve fragile cultures and habitats. <sup>10</sup>
<b>Voluntourism</b>	While there is no single accepted definition of what constitutes volunteer tourism [or “voluntourism”], generally it involves the inclusion of a volunteer component to a vacation experience. According to one academic, to be a voluntourist is to “volunteer in an organized way to undertake holidays that may involve aiding or alleviating the material poverty of some groups in society, the restoration of certain environments or research into aspects of society or environment.” <sup>11</sup>

## The Role of Impact Tourism in Responsible Travel

A leader in research and implementation of **travelers’ philanthropy** for over 15 years, the Center for Responsible Travel (CREST) has expanded and rebranded our program in 2019 under the name **impact tourism**. We feel this change is necessary to fully demonstrate how this concept has expanded to encompass the wide range of programs and models currently represented within the field of tourism.

Growing from experiments by small ecolodges in remote regions, impact tourism today encompasses corporate-wide and destination-wide programs, voluntourism, social media campaigns, public-private alliances, impact investment, and more. It represents a relatively new type of international development assistance that is flowing directly from the travel industry into host destinations. At a time when sustained development assistance from international agencies, governments, and NGOs is increasingly hard to come by, this method of funding has potential to play a critical role in the well-being of communities. Impact tourism is not about impulse giving or collecting loose change for charities without further touch-points. Rather, it is about generating, in an organized and strategic manner, tourism company and visitor support for local community projects through true partnerships. It is also about integrating impact tourism into the core experience of responsible travel.

As aptly put by Antonis Petropoulos of Ecoclub.com, "In an era of climate crisis and mass migration, leaving no footprints is no longer enough. Responsible tourists should leave solidarity footprints behind, we need a positive, progressive, green impact tourism."<sup>12</sup>

## Consumer Demand for Responsible Travel

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While tourism demand is higher than ever, there is increasing awareness among travelers that their choices have an impact. A rise in responsible travel choices, a desire to get off the beaten path, and prolific social media and press around sustainability issues are starting to move the needle in the mainstream.

Consumer demand will continue to push companies and destinations to rise to the occasion. However, a significant portion of travelers do not yet consider sustainability when making travel choices, and it is also the responsibility of companies and destinations to raise awareness and educate travelers. Here's a look at some consumer trends that have implications for responsible tourism.

### Experts say...

In an era of "tech burnout," travelers are beginning to seek refuge from their screens in favor of real-world experiences. Darshika Jones, Intrepid's Director of North America, told Skift, "We are seeing an increase in those more remote destinations where you get that opportunity to unplug and reconnect."<sup>13</sup>

The Adventure Travel Trade Association's Senior Director for Strategy and Impact, Christina Beckmann, observed in an April 2019 report: "Modern travelers focused on having local, authentic, unique experiences often can't help but to become aware of environmental or social issues in the places they visit. Especially as they are finding new ways to access local guides, their insight into local topics is enhanced. As well, our research has shown us that travelers want to learn and establish meaningful connections when they travel; this motivation aligns well with the trend toward more ethical behavior."<sup>14</sup>



Intrepid traveler in Peru. Photo courtesy of Intrepid Travel.

The Transformational Travel Council works to "radically increase the likelihood of you having a life-changing travel experience."<sup>15</sup> According to Lindsey Ueberroth of Preferred Hotels & Resorts, "it's about human rights and sustaining communities. Travelers are seeking more than just a feeling of being transformed. They want to know that their travels are, in some way, just as fulfilling for others, too." – Lindsey Ueberroth, Preferred Hotels & Resorts<sup>16</sup>

IHG CEO Keith Barr claims that the real pressure to curb plastic waste in hotels has come directly from guests, not new legislation. "Governments collectively haven't taken significant action in this space. You've got municipalities and local jurisdictions, but the reality is our colleagues and our customers expect us to take a leadership position on things like waste."<sup>17</sup>

Sean Berenson of Flight Centre New Zealand said that "even luxury travelers are often strongly motivated by an internal transformational journey and seek authentic experiences that reach a deeper emotional level and align with their own personal values, passions and aspirations."<sup>18</sup>

## Surveys and Statistics show...

A 2018 American Society of Travel Advisors (ASTA) survey reports answering the questions of “Where should I go?” (destination), “How much is it going to cost?” (price) and “Who is coming with me?” (availability of travel partners) are the top three factors determining when travelers are considering a vacation.<sup>19</sup> 61% of leisure travelers surveyed by ASTA reported a “need to take at least one vacation a year” and 44% reported a desire to “travel as often as possible.”<sup>20</sup>

However, traveling as often as possible comes with a cost. According to reports from the Cambridge Institute for Sustainability Leadership, tourism contributes to about 5% of global greenhouse gas emissions. These emissions are set to grow by 130% by 2035.<sup>21</sup> Air travel is said to account for about 2.5% of global carbon dioxide emissions but are quickly outpacing predictions.<sup>22</sup> The Ocean Foundation reports of all human activity, aviation accounts for 4-9% of the total climate change impact. Projections claim this is likely to double or triple by 2050.<sup>23</sup>



Photo by Tran Mau Tri Tam

Social and environmental considerations have become critical drivers of consumer decision-making. As showcased in a WTTTC and Bloomberg Media Group report, a consumer survey from McKinsey & Company across 60 countries found 66% of consumers say they will pay more for environmentally-friendly products.<sup>24</sup> This is especially true for younger generations. 73% of Millennials say they would pay more, and 65% of Gen Z say they research origins of products before they buy them.<sup>25</sup>

In the same WTTTC/Bloomberg Media Group report, Wiltrud Terlau of Bonn-Rehin-Sieg University of Applied Sciences in Germany says, “Stated concerns do not always translate into observed behaviours, however. Barriers such as price and inconvenience hinder action. While 30-50% of consumers exhibit intent to buy sustainable products, this only accounts for 5% of total sales.”<sup>26</sup>

A 2017 Cone Communications study cited by Impact Travel Alliance and Mandala Research found 87% of U.S. citizens reported that they will purchase a product because a company advocated for an issue they cared about.<sup>27</sup>

According to Nielsen, almost half (48%) of U.S. consumers say they would change their consumption habits to benefit the environment. 2018 was dubbed the year of the sustainable consumer with \$128.5 billion spent on sustainable fast-moving consumer goods (FMCG) products, with projections to reach \$150 billion by 2021. Sustainable product sales have increased 20% since 2014 at a growth rate four times higher than traditional goods (CAGR of 3.5% and 1% respectively).<sup>28</sup>



Bodhi Surf + Yoga, Costa Rica

Wellness has also become an important focus as more and more consumers seek to integrate healthy lifestyle practices into their travel. Skift reports wellness tourism is worth an estimated \$639 billion worldwide and is growing twice as fast as global tourism.<sup>29</sup> In addition, data from the Global Wellness Institute indicates that wellness tourists are spending between 50% and 180% more than the average tourist.<sup>30</sup>

The Adventure Travel Trade Association highlighted an Exodus Travels survey conducted by OnePoll of 2,000 Americans who travel internationally. 91% of travelers state that it's important to take ethical trips. 63% believe that this involves learning about the culture, 56% in learning simple phrases in the language, 56% in buying souvenirs from local merchants, 54% in respecting monuments, and 44% in supporting local businesses.<sup>31</sup> The study also shows people are becoming more aware of the impact they have when traveling, reporting 78% of survey respondents consider themselves to be more ethically conscious travelers than they were a year ago, and 39% have "travel guilt" after taking a trip that they now realize may have been unethical.<sup>32</sup>

Booking.com's 2018 report reveals that 54% of people normally opt for more sustainable travel after having noticed the destructive impact of the tourism in natural areas or, alternatively, the positive impact on the local population.<sup>33</sup>



According to a 2019 Booking.com report, 70% of global travelers affirm that they would be more likely to book an accommodation knowing it was eco-friendly. However, 72% are not aware of the existence of eco-labels for vacation accommodations. 37% say that that an international standard to identify eco-friendly accommodations would encourage them to travel more sustainably, and 62% of those surveyed would feel better about staying in an accommodation that had an eco-label.<sup>34</sup>

## Demand for Impact Tourism Opportunities

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Many travelers are seeking opportunities to give their time, talent, and treasure to the destinations they visit. In a 2015 Tourism Cares and Phocuswright survey of 2,551 U.S. travelers, 55% indicated that within the previous two years, they had given back to a leisure destination, either through volunteering their time or through cash and/or in-kind donations. Nearly half (48%) of all U.S. leisure travelers felt that it was very important for their spending and donations to positively benefit local communities within their vacation destinations. Causes that address issues related to basic necessities, such as food, water, and shelter, were the top philanthropic priority for 42% of U.S. travelers.<sup>35</sup>

According to a 2015 survey by the Marriott Rewards Credit Card from Chase, 84% of millennials, 68% of Gen X-ers, and 51% of Baby Boomers said that they would travel abroad to participate in volunteer activities.<sup>36</sup>

While the desire to give back is an inherently good thing, volunteer travel must be done right, or it may have an adverse effect. At the 2019 World Tourism Day Forum hosted by CREST and the Organization of American States, Claire Bennet of PEPY Tours and Learning Service highlighted the potential harm that volunteer travel can inflict on local communities. Voluntourism can foster inefficiencies and dependencies in local communities, spur orphanage trafficking and corruption, and even disrupt local power dynamics by reinforcing negative cultural stereotypes.

Yet, volunteer travel also has the potential to be a "tremendous force for good when done right." In order to avoid the common pitfalls, voluntourism must focus on the educational component, ensuring that all volunteers are learning before they are helping. "Service is not something volunteers can tick off the list on a two-week holiday – it is a lifelong commitment that may involve changing the way they live, travel, and give."<sup>37</sup>

Leigh Mathews, Co-Founder and Coordinator of the ReThink Orphanages network, shares that “if untrained volunteers are not equipped to deal with vulnerable children and families in their own country, it’s logical that the same standards must apply in developing countries.”<sup>38</sup>

To combat the common complaint that voluntourists are often underqualified for the roles that they are assigned, Moving Worlds has created a digital platform that matches young professionals who want to travel and volunteer their expertise directly with social impact organizations who seek the volunteer’s specific skillset. A total of 77% of organizations reported that strategy and/or operations improved because of the work of the “Experteer.”<sup>39</sup>



Local Guest experience in Loiza, Puerto Rico. Photo courtesy of Local Guest.

Local Guest is a women-powered sustainable tourism company based in San Juan, Puerto Rico. Following Hurricane Maria, Local Guest essentially became a relief organization. They visited the communities they had been working with and co-created a tourism product, supporting community leaders to assist in providing relief in an efficient and effective manner. Carmen Portela of Local Guest shared that “with the help of community organizers, we established service-oriented and volunteer programs throughout various communities on the island....We currently have more than 20 projects running on the island directly supporting communities and entrepreneurs that travelers (volunteers or not) can enjoy and support.”<sup>40</sup>



Local Guest experience in Morovis, Puerto Rico. Photo courtesy of Local Guest.

In 2015, Carnival Corporation launched Fathom, their social impact travel brand and experiences. Over 15 months, Fathom travelers assisted carefully selected projects in partnership with local communities in the Dominican Republic. Examples of impact included more than 15,000 seeds planted in nurseries, over 10,000 seedlings transplanted from nurseries into the Dominican soil, and more than eight acres of land reforested. Another initiative involved joining established organizations and local artisans to make clay water filters to help serve the over three million people who have no access to piped water. In 2017, travelers’ participation led to over 800 water filters produced, with more than 3,700 individuals benefiting by now having access to safe drinking water. Travelers also helped to put concrete floors in 61 homes. Citing challenges to sell, market, and scale these types of experiences, these social impact-focused cruises have evolved into “a ship-based experience to focus on shore-based activities and shared-value programming delivered through our sister brands.”<sup>41</sup>

Well organized, respectful, and thoughtful donor travel trips are proving an effective way for conservation, human rights, and relief organizations to support needed work. Philanthropy without Borders writes that the three most common reasons for donors to engage in donor travel trips are:

1. To personally witness the impact of the organization’s work
2. To gain a better understanding of the problem and solution at hand
3. To be part of the change/success of the project<sup>42</sup>

The American Jewish World Service (AJWS) works to fight poverty and promote human rights, offering financial support to over 450 organizations in 19 countries. Neely Grobani of AJWS explains that they are committed to supporting the world's most vulnerable communities by funding grassroots and global human rights organizations—"with the understanding that the people who are most affected by problems are best suited to address them." This core value is reflected in the organization's donor travel program, which connects communities that need financial support to make their fights for human rights a reality with a "diverse community of American philanthropists who are committed to using their financial power to make the world a better place."<sup>43</sup>



Photo courtesy of Elevate Destinations.

Jim Sano, the Vice President for Conservation Travel at the World Wildlife Fund (WWF), discovered through his research that WWF's financial donors that have travelled on a donor trip have a higher giving retention rate than non-traveling donors. In fact, traveling donors are 37 times more likely to have a million-dollar gift capacity, and are 21 times more likely to have a planned gift than their non-traveling counterparts. Overall, traveling donors give 35 times the total amount of non-traveling donors over their lifetime.<sup>44</sup>

When planning donor trips, Katherine Redington of Elevate Destinations recommends working with experts who ask travelers critical questions to set the context for empathy, putting the local community first, exploring the complexities of problems, and circling back to systems of change to discover how each traveler can be a part of that system.<sup>45</sup> These steps are important for responsible and impactful donor travel that truly addresses the problems that the nonprofit organization seeks to solve.

## Destinations: Supporting Responsible Travel

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There is a growing movement of destinations promoting unique, local, off-the-beaten-track experiences to spread out tourist numbers, distribute the reach of tourism dollars, and differentiate themselves from other destinations. It's increasingly accepted that long-term competitiveness in the tourism sector is dependent on sustainability and responsible tourism.

### Experts say...

"We got caught up in the race for bigger numbers. We realized over time that the true metric for tourism is the economic and social impact on the community: job development, economic impact, neighborhood impact. If you don't bring locals with you when you're invigorating or building a destination, you're missing an important part of the equation." – Fred Dixon, CEO, NYC & Company<sup>46</sup>

"Our success cannot continue unabated if we don't take into consideration that this industry is like any other commodity and needs to be sustainable. California's travel and tourism industry continues to redefine ourselves, and today, that means expanding our mission to focus on stewardship. Destination marketing is becoming destination management." – Caroline Beteta, CEO, Visit California<sup>47</sup>

"Tourism is an industry that makes use of often fragile environments in economies and locations that require holistic rather than gated development, requiring big minds that recognize the sector has the ability to bring great sustainable benefits to the citizens and governments of any country willing to share their nation and environment with others.

For a sector increasingly dominated by global brands and a desire to exploit the value of beautiful or interesting locations to the principal benefit of corporations and shareholders, this may seem revolutionary, even dangerous. However, if they value commercial continuity, such thinking is little more than common sense.” – David Jessop, Consultant, Caribbean Council<sup>48</sup>

“At Impact Travel Alliance, there are three important issues and conversations that we see rising to the top over and over again in our industry. One is the need for travel destinations and businesses across the board to **embrace transparency** in their operations and certainly their marketing. The second is an urgent need for regenerative **tourism development** in areas around the world that have already been negatively affected by human advancement and/or overtourism. And the third is the absolute necessity of **multi-stakeholder involvement** in community tourism development. ITA works with several organizations in the community tourism space and we have seen the success that this model can have when everyone has a seat at the table.” – Kelley Louise, Founder and Executive Director, Impact Travel Alliance<sup>49</sup>

“IIPT is forecasting that international arrivals will reach 2.0 billion by 2030, 200 million more than UNWTO projections. According to the Global Footprint Network, we currently require the regenerative capacity of 1.7 Earths to provide the ecological services we use in a single year. The same areas most seriously exceeding their ecological capacity are the very areas where the greatest growth in international tourism arrivals are projected and are in many instances currently experiencing ‘overtourism.’” – Louis D’Amore, Founder and President, International Institute of Peace through Tourism (IIPT)<sup>50</sup>

## Surveys and Statistics show...

Starting in December 2018, the Global Sustainable Tourism Council (GSTC) began a public consultation process for collecting recommended improvements and additions for the GSTC Destination Criteria. Through a multi-round process of consultations and revisions, the updated criteria will be presented to the GSTC Board in December 2019.<sup>51</sup>

The European Union’s (EU) Compendium of Best Practices has outlined the top 10 tips for smart destination management:

1. Accessibility of the destination
2. Combating or adapting to climate change
3. Preserving and enhancing the natural environment
4. Spreading the flow of tourists
5. Facilitating information for specific target groups
6. Collecting information for smarter management
7. Physical and virtual accessibility through innovation
8. Reviving traditions and cultural heritage sustainably
9. Communal infrastructures
10. Usage of cultural heritage for new creativity<sup>52</sup>

Skift’s 2019 “Megatrends” report concludes, “Now that the understanding of overtourism has essentially gone mainstream around the world, a parallel trend – undertourism – is playing out in some emerging destinations that are framing themselves as peaceful yet exciting alternatives to the packed streets of other cities. As undertourism enters the industry’s collective consciousness, offbeat destinations or those with new stories to tell are marketing immersive experiences that build relationships with people, places, culture, and community over Instagram-worthy photo ops and mass touring.”<sup>53</sup>

As cities now face up to the rising challenges of tourism, Euromonitor International emphasizes that “one way forward is stakeholder discussions on the benefits of tourism, an agreement of the boundaries or tipping points of sustainable growth, as well as how to mitigate the challenges of tourism.”<sup>54</sup>



A number of studies suggest that ever-increasing visitor arrival numbers as a result of promoting mass tourism may actually drive down wages in the host destination. Research by the Federal German Tourism Association (BT) concluded in their study of 89 developing countries and emerging economies that while increases in international tourism cause income inequality to initially decrease, it then increases making long-term inequality permanent.<sup>55</sup>

On average, U.S. wages are rising more in other industries than the hospitality industry. Compared to an average \$1 increase in pay across the whole economy, the hospitality industry generated just an 81-cent pay raise for workers. Tarik Dogru, assistant professor at Florida State University's Dedman School of Hospitality, who lead the study, noted that the wage gap was a competitive disadvantage for the tourism sector, hampering its ability to attract and retain talent.<sup>56</sup>

In a blog post from the World Bank on tourism opportunities in Africa provided through the digital economy, Hermione Nevill states:

“While the tourism sector can be highly impactful, the economic and social benefits are not spread equally between destinations, demographics, or communities. Much of this depends on the distribution and quality of underlying natural and cultural assets, as well as access (visas, infrastructure, transport services), investment climate, and other factors. Market access is critical and the opportunities to participate in the tourism economy depend to a large degree on whether providers can reach their target consumers. The digital economy plays an increasingly important role and can help level the playing field. However, it can also further the digital divide and exclude those who are least able to participate.”<sup>57</sup>

The Destination Stewardship Center (DSC) highlights the Thompson Okanagan Tourism Authority (TOTA), the regional Destination Management Organization (DMO) for the Thompson Okanagan region of British Columbia, which is committed to a holistic management approach to their destination. During the 18-month process of developing their 10-Year Regional Tourism Strategy, TOTA consulted with more than 1,800 private, public, and nonprofit stakeholders about the issues and potential solutions of their regional tourism strategy. Currently, 4,500 representatives participate in their free, stakeholder-based model.<sup>58</sup>

Amsterdam has launched a “Stad in Balans” (A Balanced City) policy with the ambition “to find a new equilibrium between visitors and residents. A new equilibrium between quality of life and hospitality. Visitors are welcome, but residents come first.” The main focus areas include:

Less nuisance

Attractive mix-use development

Better financial balance in visitor economy

More space on the streets and in the canals<sup>59</sup>

Upon implementing the “Palau Pledge” in late 2017, Palau became the first nation to change its immigration laws for the cause of environmental protection. When entering the country, visitors need to sign a passport pledge to commit themselves to acting in an ecologically responsible way on the island, for the sake of Palau’s children and future generations. As of September 2019, over 220,000 pledges have been signed.<sup>60</sup>

Jim Barborak, Co-Director of Colorado State University’s Center for Protected Area Management, cites outdoor recreation and nature-based tourism as important tools for conservation and the economy. However, the need for research to support decision-making remains.

“Investments in outdoor recreation research, particularly in analyzing the economic impact of nature-based tourism and outdoor recreation, can help demonstrate to political decision makers and philanthropists the need for investments in improved public use programs and facilities, and in dealing with maintenance backlogs — like the over

\$11 billion dollars in such repair work needed in U.S. national parks alone. Unfortunately, investment in outdoor recreation research has not kept pace with the need, with over 1.4 billion international tourist arrivals each year, 500 million visitors each year to U.S. national parks and forests and over 800 million to U.S. state parks, and similarly rising numbers in many nations around the world—along with growing concerns about both overtourism in some heavily visited sites, and extremely low visitation numbers in other destination that would like to attract more visitors.”<sup>61</sup>

Furthermore, research in outdoor recreation and tourism will be pivotal as destinations face the growing threats of climate change. A Purdue University report projects that the management of Indiana’s parks, trails, and natural areas will become more difficult in coming years. “More intense rainfall, warming temperatures, and changing streamflow patterns are expected to shift habitat suitability for plants and wildlife, increase pressure from invasive species, and alter the timing of biological events that generate tourism.” These findings draw concerns for the state tourism sector, which saw more than 79 million visitors and contributed more than \$12.2 billion to the economy in 2016.<sup>62</sup>

Starting with a pilot program in 2012, the Sinaloa Secretary of Tourism, along with additional partners, launched a Competitive and Sustainable Tourism program in Mazatlán, Mexico, to promote environmentally-friendly practices in the hotel sector. Today, 23 businesses, representing 36% of the total hotel offerings, are incorporated under this program for their compliance with sustainable practices and hotel operation and administration. The hotels have seen an overall saving of 21% in their use of water, 38% in gas and 54% in electricity.<sup>63</sup>

We continue to see a shift in DMOs from marketing-exclusive towards more holistic management. The Sedona Chamber of Commerce and City of Sedona released their “Sedona Sustainable Tourism Plan” guided by four objectives: environment, resident quality of life, quality of the economy, and visitor experience.<sup>64</sup>

## Impact Tourism as An Impactful Tool

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Kind Traveler, a social impact hotel booking platform, is now working with DMOs and hotels on integrated give-back programs. Recently, Kind Traveler “created a two-year partnership with Sonoma County Tourism as they shifted from a DMO to a Destination Stewardship Organization (DSO). They are poised to be America’s first 100% certified sustainable winemaking region in the U.S. by the end of 2019. Three local charities were designated as beneficiaries on the Kind Traveler platform — Russian Riverkeeper, Sonoma Land Trust, and Redwood Empire Food Bank. More than 10 participating hotels in Sonoma County offer exclusive rates and perks when travelers give a \$10 nightly donation to a designated Sonoma County charity, or to a charity of choice on KindTraveler.com. So far, donations have fueled the clean-up of more than 5,000 lbs. of trash out of the Russian River, a resource that is vital to the sustainability of Sonoma County. A similar program has rolled out with Lake Tahoe Visitor’s Authority on Kind Traveler, with many other DMOs taking interest as well.”<sup>65</sup>

The National Park Service’s Guest Donation program solicits donations of just one dollar per stay at America’s national park lodges and other overnight facilities. The donations are particularly helpful as the National Park Service (NPS) has a \$12 billion maintenance backlog. Derrick Crandall, Counselor for the National Park Hospitality Association (NPHA) said, “the American public strongly supports continued federal appropriations for our national parks. This support is bipartisan and cuts across all demographic groupings of Americans.” The top earners for donations in 2015 were Yosemite National Park with \$461,000 and Grand Canyon National Park with \$253,000.<sup>66</sup>

These types of impact tourism programs are critical. In fact:

Research conducted across 34 countries in the developing world and published in *Science Advances* concluded that households located within 10 km of a protected area with documented tourist visits had 17% higher wealth levels and 16% lower likelihood of poverty than similar households living far from protected areas, demonstrating how protected areas and nature-based tourism can positively affect human well-being in developing countries.<sup>67</sup>

A report published by The Travel Foundation, Cornell University’s Centre for Sustainable Global Enterprise, and EplerWood International covers the “invisible burden” of tourism and shares practical examples destinations are taking to counter the burden. For example, in August 2019, the New Zealand Ministry of Tourism began collecting an “International Visitor Conservation and Tourism Levy (IVL)” of \$35 NZD (\$25 USD) to cover tourism infrastructure costs and to support the protection of the natural environment. The government is implementing this new policy through an electronic visa waiver, which comes as a result of negative pressures after a dramatic increase in tourism arrivals.<sup>68,69</sup>

Also cited in the report, the Balearic Islands have raised €100 million in 2016 and 2017 from a tourism tax intended to help protect the islands’ natural and cultural heritage. Despite warnings of its negative effect on tourism, the Balearics saw a 6.6% increase in tourism in 2017.<sup>70</sup>

Following in similar suit to Palau, Skift reports Bend, Oregon and other small mountain towns in the American West have launched the “Pledge for the Wild” campaign in summer 2019. Travelers pledge funds through a text-to-donate channel, in which each donation is directed towards a nonprofit tied to local environmental issues. Travelers are suggested to donate \$1 per hour spend in a wild area. Consumer engagement can improve visitor behavior and encourage repeat visitation due to a deeper level of connection.<sup>71</sup>

Since 2011, the Travel Oregon Forever Fund has received more than \$220,000 donations in support of 28 projects across the state. 100% of donations support projects within the state that improve visitor experience, restore or protect natural landscapes, enhance outdoor recreation experiences and/or provide volunteer opportunities for residents and visitors.<sup>72</sup>

The Monteverde Community Fund is a social enterprise in Monteverde, Costa Rica that gives tourists a chance to give back to the local community through the purchase of local goods and services. By offering sustainable tour options, such as the Monteverde Footprints Tour, as well as by selling local consumer products, postcards, and coupon books for local restaurants, the Community Fund has been able to invest over \$160,000 in local programs that support reforestation projects, recycling centers, solar panels, women’s enterprise, rainwater treatment, organic school gardens, and many more.<sup>73</sup>

Founded in 2012, CARE for the Cape & Islands in Cape Cod, Massachusetts, is a destination stewardship organization that funds impactful local projects, engages volunteers, and educates both visitors and residents about the importance of preserving the natural environment and protecting the cultural and historical treasures of the region. To date, CARE for the Cape and Islands has awarded \$55,000-\$60,000 to regional projects that have had a large impact on the local culture of sustainability, including a compost collection project, an event waste stations system, and beach clean ups.<sup>74</sup>



CARE for the Cape & Islands Day, 2018. Photo Courtesy of CARE for the Cape and Islands.

Sustainable Travel International launched the Torres del Paine Legacy Fund in 2014, dedicated to enhancing the long-term health of Chile’s Torres del Paine National Park and its surrounding communities. Travelers and tourism businesses compliment public-sector investments in the Legacy Fund, which has raised over \$187,000 in financial and in-kind support. As a result, 208 volunteers and park rangers have contributed over 9,061 hours working in the national park, 6,165 meters of trail and boardwalk have been constructed or restored, 20,000 lenga trees have been monitored to track the progress of reforestation efforts, and 15 recycling containers have been installed throughout the local town of Puerto Natales. As a result of the latter, recycling in Puerto Natales increased by 600% in 2016 and 250,000 kg of waste has been diverted from the landfill.<sup>75</sup>

Through support from local tourism businesses and visitors to the island, the Heart of St. Kitt Foundation’s Rails-to-Trails community tourism project will turn an out-of-use railway, which was once an iconic symbol of St. Kitt’s economic past as a major sugar producer, into a hiking and biking path. The restoration and conversion of a 1.4 km section of the railway allow locals and visitors to visit some of the island’s hidden historic treasures, while providing opportunity to grow tourism businesses in the local community.

Coral reefs have declined in the Caribbean by as much as 50% to 80% in the past 30 years. In response, Tourism Cares, the Caribbean Hotel and Tourism Association (CHTA), and the Grupo Puntacana Foundation have partnered on a Coral Restoration Capacity Building Project, which trains individuals from affected Caribbean destinations on coral reef restoration.<sup>76</sup>

The U.S. bison conservation project in Montana is a joint effort between the American Bison Society – an initiative of the Wildlife Conservation Society – and the Blackfeet Nation. The aim of the project is to bring economic benefits to the Montana tribe through reintroducing bison, a component of their cultural and economic heritage. The pilot project allows hand-selected tourists on horseback to assist in moving the bison between pastures. Tourist feedback indicated they felt the experience was highly exciting, and as a result they made donations towards the conservation project, creating high-value donors. The project hopes to couple the bison viewing with lodges and other (adventure) activities that encourage visitors to extend their stay, contributing to further economic benefit to the community.<sup>77</sup>

## Businesses: Supporting Responsible Travel

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For the sake of protecting the tourism product itself, tourism companies are obligated to develop built infrastructure and managing tourism operations in a socially and environmentally sustainable way. Travel remains one of the best forms of informal education, and businesses can and must leverage this to inform and engage travelers in destination conservation and resilience.

### Experts say...

"Eco-labeling in tourism is widespread in terms of hotel certification and somewhat less so for tour operators, but both are poised to take off as travelers seek clear choices for sustainable tourism and businesses increasingly see the value of certification. Importantly, after 2+ years, GSTC has developed and refined an accreditation scheme that allows for meaningful eco-labeling. That supports clarity on the supply side, while we see positive change on the demand side as evidenced in a recent survey by Booking.com showing that 70% of global travelers say they would be more likely to book an accommodation knowing it was ecofriendly." – Randy Durband, CEO, Global Sustainable Tourism Council (GSTC)<sup>78</sup>



Community-based tourism in Myanmar. Photo courtesy of Intrepid Travel.

"There’s this idea that having a purpose or doing good has to come at the expense of making a profit... Profits can and should help affect positive change on a global scale. The good news is, consumers want more sustainable and ethical products, so purpose is actually good for business too. And Intrepid can attest to that. Finding our purpose has helped us deliver four years of record growth...Intrepid used to want to be the best travel company in the world. Now we want to be the best travel company for the world." – James Thornton, CEO, Intrepid Travel<sup>79</sup>

## Surveys & Statistics show....

Having a positive impact on the communities they visit is becoming a key consideration for tour operators, with some taking a step further and making the economic impact on more transparent for their guests. For example, G Adventures recently introduced a “Ripple Score” tool showing what percentage of a tour’s local spend remains in the local economy.<sup>80</sup>

A 2019 UN Environment report, commissioned for the Dominican Republic, found that many of tourism’s environmental impacts occur outside of hotels. 60% of greenhouse gas (GHG) emissions and 90% of water usage is related to indirect causes, such as the production of food, and other materials, transport and generated waste. However, the remaining 40% of GHG emissions and 10% of water usage is still vitally important to consider, because they occur within the direct control of the hotel.<sup>81</sup>



Community-based tourism in Panauti, Nepal. Photo courtesy of G Adventures.

The Organization for Economic Cooperation and Development’s 2018 “megatrends” report states that “hotels...can directly influence sustainable food production through regional or organic food purchasing policies. For example, the initiative by the Scandic hotel chain to only purchase organic and fairly traded coffee affects 20 million cups of coffee served per year.”<sup>82</sup>

UN Environment noted that in 2017, a Memorandum of Agreement was signed between the development corporation behind El Nido Resorts and local farmers in Palawan, Philippines, guaranteeing that at least one ton of vegetables per week are supplied by local farmers. Procuring local food enabled an overall reduction in transportation costs and reduced GHG emissions for El Nido Resorts. The company also reduced overall food costs by 20% in 2016.<sup>83</sup>



Women on Wheels in Delhi, India. Photo courtesy of G Adventures.

In a collaboration with World Wildlife Fund (WWF), CREST is working on a project to better understand how policies and practices allow food to go to waste in the Caribbean, and the role the tourism industry can play in preventing and managing food waste.<sup>84</sup> Bucuti & Tara Beach Resort in Aruba, the first CarbonNeutral® resort in the Caribbean, took on this initiative and successfully reduced almost 30% of food waste before and during service to guests.<sup>85</sup> The project stemmed from WWF’s work with the American Hotel & Lodging Association, supported by The Rockefeller Foundation, to create the Hotel Kitchen platform – a toolkit of guidance and resources to help hotels prevent food waste, donate food, and keep waste out of landfills and incinerators.

Women on Wheels is a social enterprise that works to combat women’s lack of access to education and opportunities in resource-poor areas of India by working with disadvantaged women to empower them to become professional drivers. By doing so, Women on Wheels is “building a supportive ecosystem within communities to enable women to choose livelihoods with dignity.” With over 500 female drivers trained in 2018, Women on Wheels empowers women from resource-poor areas by allowing them to feel a great sense of purpose and to take control of their own lives and futures.<sup>86</sup> Responsible tour operator G Adventures and Planeterra (G Adventures’ foundation arm) “have provided funding for a third of Women on Wheels fleet vehicles, as well as funding and resources for the Women on Wheels

training program. G Adventures was the first tour operator to contract Women on Wheels as our India airport pick-up partner, creating a sustainable and growing customer base for this emerging social enterprise.”<sup>87</sup>

In France, Betterfly Tourism estimated that each year the production and treatment of bed linens and towels for the hospitality industry generates 470,000 tons of CO<sub>2</sub>. This contributes to over 10 million m<sup>3</sup> of water consumed and 15,000 tons of detergents required. For this reason, Hotel Amiral piloted the procurement of unbleached bed linen and microfiber towels, an environmentally responsible alternative. Results from a subsequent customer satisfaction survey demonstrated a strong acceptance of the change: 81% were very satisfied with the overall quality, 85% were very satisfied with the visual aspect, and 76% were very satisfied by the softness.<sup>88</sup>

In order to drastically reduce water usage, the hotel sector in Cape Town, South Africa has utilized rain-harvesting tanks, grey water systems, and water-saving devices. Smarter water consumption through a limit of 50 liters per day resulted in a 60% reduction in water usage in three years.<sup>89</sup> The Tsogo Sun Hotels group was a pioneer in the industry, making improvements such as lowering tap pressure, installing instant-heating showers, swapping cloth for paper napkins and tablecloths, and filling pools with borehole water.<sup>90</sup>

Skift reports “In the meetings and events industry, there’s near universal agreement that embracing sustainable practices is both the smartest and the most responsible course of action... The Venetian Resort Las Vegas is at the forefront of this trend, having introduced a robust, standards-driven program called the Sands ECO360 Global Sustainability Strategy. ECO360 helps the resort reduce its own environmental impacts while helping clients address their specific sustainability goals. Planners can leverage ECO360 to create greener events that also increase attendee engagement and enjoyment.”<sup>91</sup>

In relation to MICE (meetings, incentives, conferences, exhibitions) tourism, a 2019 International Association of Conference Centers IACC survey of 250 meeting planners from five different continents found that “ethical operations and sustainable practice” (44%) was voted as the second most important element for meeting venues to address in the next five years.<sup>92</sup>

“In 2018, Hilton became the first major hotel brand to set science-based carbon targets aligned with climate science and the Paris Climate Agreement. Since 2008, we have achieved a 34% reduction in Scope 1 and 2 carbon emissions. All Hilton properties are required to use LightStay to set energy reductions targets in line with our 2030 goals. Hotels are also required to identify a continuous improvement project that will help drive energy conservation, and LightStay measures each hotel’s performance and progress. In 2018, Hilton also became the first major hotel brand to join the Climate Group’s EP100 initiative by committing to improve our energy productivity in line with our 2030 carbon targets.”<sup>93</sup>

Hilton also has a mission to cut its environmental footprint in half to double its social impact by 2030. By doing so, Hilton is attempting to redefine sustainable travel and to ensure that when guests stay at a Hilton, they are by default making a sustainable travel choice.<sup>94</sup>



Soneva Kiri, Thailand

Ethical Corporation reports, “Soneva, which owns three luxury resorts in the Maldives and Thailand, is providing access to fresh water for local communities with its own water bottling plant, while India-based ITC Hotels Group, with its mantra of “responsible luxury,” has Leadership in Energy and Environment Design (LEED) platinum-certified each of its hotels, integrating elements such as 100% LED lighting, solar panels and living roofs.”<sup>95</sup>

El Cid Resorts in Mazatlán, Mexico runs a nonprofit foundation to improve and strengthen the well-being and quality of life for their employees, as well as their families and the local community. Among other initiatives related to health, housing, and education, the foundation pays annual school registration fees and supplies for one child of every employee, provides a 50% discount on medical tests, and will repair local houses that are in poor condition free-of-charge.<sup>96</sup>

Hamanasi Adventure & Dive Resort in Belize offers a weekly Green Hour during which their Green Team interacts directly with guests, teaching them about their eco initiatives, many of which guests can choose to implement at home. Additionally, as part of their intensive employee training and ongoing professional development, they have created a wellness program that offers free medical clinics, nutritional education, and exercise programs. This has led to the staff becoming role models in their community, encouraging non-staff members to join activities and an overall increase of health consciousness.<sup>97</sup>

Reality Tours & Travel's walking tour of Dharavi, India, one of Asia's largest slums, challenges negative stereotypes and supports the locals. With residents acting as guides, small groups meet with local artisans and micro-industries in Dharavi. Four-fifths of the company's profits are reinvested into local development projects, such as computer and English classes, a girls' soccer program, and a project called "I Was a Sari," which employs women to upcycle old saris into designer products.<sup>98</sup>



Hamanasi Adventure & Dive Resort, Belize

## Impact Tourism: Translating to Business

A 2016 study by Sustainable Travel International and Mandala Research found 86% of the 2,292 travelers surveyed agreed that making a concerted effort to ensure the local community will benefit from its presence would positively increase the brand perception of a corporation. 78% of travelers were very or somewhat likely to choose a company that reinvests a portion of its proceeds to those in need in the local community.<sup>99</sup>

Local Alike, based in Thailand, strives to incorporate the elements of impact tourism into their core model. In the last seven years, Local Alike has invested 1,200 hours to work with 100 local host communities in 42 provinces to support capacity training to foster a mutual understanding of community-based tourism and self-management. 2,000 part-time jobs which have been created for local residents, with 54 million THB generated for local communities through community-based tourism efforts.<sup>100</sup>

TrekSoft survey results show that ecological tours that use proceeds to fund ecological projects, such as habitat restoration or reforestation, are chosen above alternatives without a cause.<sup>101</sup>

The Lindblad Expeditions-National Geographic Fund is 100% donation-based from expedition guests. In 2017 alone, it raised \$1.4 million worldwide that was distributed to various projects and grants in the categories of conservation, education, research, storytelling, and technology.<sup>102</sup> Through a targeted communication strategy to solicit philanthropic support from their Galápagos Islands tour clients, Lindblad Expeditions quadrupled the average philanthropic giving to the Charles Darwin Foundation from \$1,800 to \$6,700 per Galápagos tour. The program raised over \$4.5 million over a ten-year period to support local conservation efforts of the Charles Darwin Research Station and Galápagos National Park.<sup>103</sup>

Myths and Mountains, located in Nevada, provides experiential educational adventure travel in Asia, designing unique group and private custom programs that highlight the cultures and crafts, religions and pilgrimage sites, traditional

medicines, and environment and natural history of the countries they visit. In 1991, after a local trek leader expressed a desire to have a library in his village, President Dr. Antonia Neubauer commissioned the first Rural Education and Development (READ) Center to be opened in Junbesi, Nepal. Each READ Center has a library with at least 3,000-5,000 books in the local language, newspapers and magazines, a children’s room with toys, games and books for the young, a women’s room, an audiovisual room, a computer room, and a meeting room for local people. As of 2019, READ has built 107 READ Centers in Nepal, Bhutan and India, seeded 184 businesses and provided 2,425,773 rural villagers with access to READ Centers. READ has raised more than \$15,000,000 over the past 20 years, with every READ trip including a \$300 contribution, soliciting funds from travelers following their trips, and fundraising activities.<sup>104</sup>

Overseas Adventure Travel (O.A.T.) is part of Boston-based Grand Circle Corporation’s family of travel companies. In 1992, owners Alan and Harriet Lewis established the nonprofit Grand Circle Foundation to support communities in which Grand Circle works and travels, including some 300 humanitarian, cultural, and educational endeavors worldwide. The Foundation is an entity of the Lewis Family Foundation, which has pledged or donated more than \$200 million since 1981 with an average of 10,000 people donating \$1 million annually. One project is the W.A.S.H. (Water, Sanitation, Hygiene) initiative, which ensures that all schools and communities they visit have an adequate supply of clean water and toilets that meet or exceed local standards. To date, 90% of schools and 70% of villages have reached this goal. Since 2015, as part of this initiative, Grand Circle Foundation has funded \$787,000 toward 102 water projects including wells, water tanks, and water filters, impacting 17,000 people.<sup>105</sup>

Bodhi Surf + Yoga is a small tourism business located in Bahia Ballena, Osa, Costa Rica that utilizes surfing, yoga, nature immersion, and community engagement as tools to facilitate memorable learning experiences with the intention of promoting individual, long-term, pro-environmental action. One impactful philanthropic project is the Bahia Ballena Plastic Free Initiative, which aims to reduce the consumption of single-use plastics by raising awareness about how plastics are suffocating the oceans, as well as providing viable alternatives like recyclable and/or compostable materials. This initiative targets communities surrounding Marino Ballena National Park — a high-profile coastal tourism destination which hosts up to 170,000 visitors annually. Spearheaded by Bodhi Surf + Yoga in conjunction with local nonprofits Geoporter and ASANA, this initiative targets businesses such as tour agencies, hotels, restaurants, and supermarkets, over 80 of which have already signed the plastic-free pledge. Bodhi also offers guests the opportunity to adopt a tree from their nursery for \$25, which is geo-tagged upon planting, allowing them to locate their tree and follow its progress. Donations are solicited through an email campaign sent to guests after their stay that informs them that Bodhi has made a \$20 donation on their behalf and prompts them to follow suit. From inception in 2014 Bodhi staff have donated 11,559 volunteer hours and Bodhi has raised over \$77,950 through its impact tourism program.<sup>106</sup>



Bodhi Surf + Yoga, Costa Rica

Island Outpost is a collection of distinct luxury hotels and villas in Jamaica that operates according to three key values: connection with the local community, connection with nature, and a commitment to environmental sustainability. Island Outpost provides jobs by employing workers from nearby communities and supports local schools and projects by implementing community service programs for hotel staff on all of its properties. In addition, with a partnership with Oracabessa Fisherman Association, Island Outpost has committed its time and energy to transforming an overfished bay area into a fish sanctuary, increasing fish biomass by over 1,700%. Island Outpost also works to connect guests to the local community and to nature by offering educational outings, such as snorkeling and glass bottom boat tours in the bay, to teach travelers about the hotels’ eco-conscious programs and the various ways that travelers can be a part of protecting the environment and community efforts in Jamaica.<sup>107</sup>

Abercrombie & Kent Philanthropy (AKP), the philanthropic arm of Abercrombie & Kent, focuses on four main pillars: education, conservation, health, and enterprise.<sup>108</sup> During 2017 alone, AKP projects served over 2,400 student lunches,



hired two new conservation offers to monitor the endangered rhino population in Botswana, donated \$400,000 in medical supplies to Zambia's Nakatindi Health Clinic & Maternity Ward, built 47 clean wells in rural Cambodia, provided 91 purification filters to 11 Maasai schools, and more.<sup>109</sup>

Much Better Adventures works with 100% local businesses and ensures that of every \$100 spent, \$80 on average goes into the local economy. The company has also mitigated the equivalent of 4x the carbon emitted by their travelers, saving 83 acres of rainforest, 19,920 trees, and trapping 21,580 tonnes of CO<sub>2</sub>.<sup>110</sup>

Travel businesses are making important contributions to disaster relief efforts. Recently, cruise lines like Royal Caribbean, which operate in the Bahamas and other Caribbean islands, have committed to sending vessels and supplies to aid victims of Hurricane Dorian. As of September, Royal Caribbean has transported 810 people and donated almost 150,000 bottles of water to those in need.<sup>111</sup> The cruise line has also filled shipping containers with hundreds of generators and tarps, as well as thousands of pounds of diapers, pet food, plywood, and other supplies to send to the island.<sup>112</sup> Royal Caribbean announced that it was committed to donating \$1 million to relief efforts and to match individual employee donations to charitable organizations. Throughout the month of September, the cruise line, in partnership with the Bahamian government and the Pan American Development Foundation, has been "serving 20,000 meals a day and helping to shuttle people off Grand Bahama to Nassau."<sup>113</sup>

Pack for Purpose is a nonprofit that allows for travelers, tour companies, and accommodations to collaborate with different programs in the world, by having travelers pack needed supplies in their luggage. These supplies are used in education, health, child welfare, animal welfare, and socioeconomic development. Rebecca Rothney of Pack for a Purpose shares that "since 2010, Pack for a Purpose travelers have taken over 153,327 kgs (337,319 lbs.) of supplies meeting essential needs in over 60 countries."<sup>114</sup>

Airlines are also implementing impact tourism programs. Virgin Atlantic's sustainability program, Change is in the Air, ranges from reducing carbon emissions, to improving their supply chain impact, and working with nonprofit partnerships. They are reaching their 2021 goal to reduce CO<sub>2</sub> emissions by 30%, by upgrading their fleet and optimizing aircraft and engine efficiencies. Through donations from staff, partners, and customers, Virgin has raised £5 million to fund the WE Schools' program, which aims to educate, engage and empower children aged seven to 18.<sup>115</sup>

"At Alaska Airlines, we are committed to serving the communities where a significant number of our employees live or work. Our giving has spanned over 35 years, and over the past five years Alaska Airlines has invested \$45 million in cash or in-kind donations. In addition to our corporate donations, our employees give back through matching gifts, volunteer time and food drives – impacting nonprofits with over \$700,000 annually."<sup>116</sup>

"JetBlue crewmembers have always inspired humanity through volunteerism. Five years ago, we decided to honor our crewmembers' commitment to giving back by launching Community Connection – our crewmember volunteer program designed to align corporate giving with individual crewmember passions. To date, JetBlue crewmembers have volunteered over 675,000 hours of service, resulting in over \$1.5 million of in-kind donations impacting their local communities."<sup>117</sup>

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Information in this report was compiled from published resources or was self-reported by highlighted companies. While every effort was made to ensure credibility of included factoids, CREST does not take responsibility for information reported by third parties.

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