DEMAND FOR CERTIFICATION ACCORDING TO CONSUMER DEMAND EXPERTS AND CONSUMER ADVOCACY ORGANIZATIONS

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Activity 3.1.1.2: Marketing Certification
A component in the IDB-MIF project, "International Accreditation System and Consolidation of National Systems for Sustainable Tourism Certification to Facilitate Small and Medium Enterprises' (SMEs) Competitiveness and Market Access"

Abstract:

Consumer surveys consistently indicate that most travelers express a strong interest in sustainability principles. Marketing experts caution, however, that this stated interest is usually secondary to concerns about the "quality" of the immediate vacation experience when travelers make their actual decisions about where to go and who to patronize. The challenge in estimating consumer demand for certification programs is twofold. First, how important are the sustainability practices of tourist destinations and suppliers in the actual travel decisions of tourists. Second, how important is it those travelers who are concerned about sustainability that these practices be formally documented through green certification programs rather than conveyed through other less systematic channels (e.g., company literature, word-of-mouth, personal experience).

In order to gain insights into potential U.S. consumer demand for sustainable tourism certification programs, structured interviews were held with a small sample of tourism marketing experts. The respondents were unanimous in their opinion that U.S. consumer demand for sustainable travel certification products is minimal at the current time. Several did note, however, that consumer awareness and commitment to sustainability issues continues to grow in the United States and should prove the basis for future demand for certified travel products. Potential European demand was evaluated through a series of research and interviews. European demand for sustainable practices and certification program appears to be greater than in the United States, but is still much less important that traditional "quality" concerns.

Because of the limited consumer demand for sustainable travel certification programs at the current time, the experts concluded that marketing should be aimed at travel intermediaries and affinity groups that are likely to be most responsive to the sustainability message. Co-marketing and affiliations with respected government entities, NGOs, and consumer-oriented companies would be helpful in building consumer recognition.

The marketing message should feature those elements of quality and sustainability of greatest interest to consumers. Specifically, travelers are likely to be most interested in traditional price and quality measures and these should be included with green certification programs whenever possible. Sustainable tourism certification programs should also emphasize the protection of the natural and cultural resources of greatest interest to travelers rather than focusing on the use of green technologies by suppliers, which typically has a less direct impact on the quality of the vacation experience.

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Introduction:

The purpose of this section is to report on consumer demand for eco- and sustainable tourism certification. No reliable market research is currently available on the level, growth, or characteristics of demand for these types of certification programs. As a result, expert opinions were sought. Discussions with these experts highlighted several fundamental challenges in estimating consumer demand for sustainable tourism certification programs.

One of the challenges is disentangling stated consumer motivations from actual travel decisions. Considerable research has been conducted into traveler motivations, but almost all of this consists of attitude surveys that ask potential travelers what is important to them. The responses to these surveys consistently report that travelers place a high priority on social and environmental protection. The academic research (Leggett, Nancarrow) and the U.S. consumer demand experts interviewed caution, however, that there is a high risk of "social responsibility bias" in attitude surveys. This is because subjects tend to tell interviewers what they think that they want to hear and what makes them feel good about themselves. As a result, consumer attitude surveys are likely to overstate considerably the degree to which sustainability issues influence actual travel decisions. No systematic research in the United States was found that corrects for this bias and accurately quantifies the level of demand or willingness to pay for greater sustainability in travel destinations based on what U.S. travelers actually do rather than what they say.

The European research (Hamele, 2004) indicates that consumer demand is fundamentally quite simple: "to have an excellent holiday and come back with a smile". While environmental and social impacts may influence the experience, it is likely that more traditional factors (price, accommodations, food, excursions, health and safety) will dominate. Specifically, among 20 decision-making factors for the next holiday, environmental and social issues rank more or less in the middle. That is, they were not first priority, except if travelers fear negative influence on their health and safety (e.g., algae growth in the Adriatic, danger of avalanches, crime against visitors).

A second challenge is in translating consumer demand for sustainable travel practices into demand for certification programs. Travelers who are genuinely interested in sustainability may not be particularly concerned about having the validity of those practices independently confirmed by formal certification programs. Instead, they may be satisfied with personal observation, word of mouth, or the assertions of destinations and suppliers themselves. Thus, the key question for this study is the extent to which consumers make their travel decisions based upon (and are willing to pay for) formal certification programs. No systematic survey research was found that documents the demand for certification programs per se in the travel industry in the United States.

There is some indirect evidence from European studies about the differences between stated interest and actual awareness of and demand for green certification programs. For example, while 72% of German tourists said that an eco-label would be more important to them than a traditional quality label, only 3-19% of these tourists were actually aware of current German tourism eco-labels (Hamele, 2004). Similarly, when asked about which environmental factors would be most important to them in thinking about their next holiday, only 14% indicated that access to information on eco-labels would be important. These indicators are not, of course, direct measures of demand for green certification, but they do suggest a social responsibility bias in many of the responses to questionnaires in Europe as well as the United States.

A third conceptual challenge is sorting out the extent to which consumer demand needs to be based on direct knowledge of various certification programs versus reliance on travel intermediaries to make these judgments on their behalf. For example, eco-conscious travelers are likely to pick destinations, tour operators and accommodations based on their reputations for responsible behavior. While they may not be aware or care whether these locations or suppliers are formally certified, the more conscientious ones are more likely to be certified and that certification is likely to have contributed to their overall reputation. Thus, certification may have an important indirect influence on consumer demand and willingness to pay, even though the traveler may not be explicitly aware of the underlying certification. Again, no research was found that systematically evaluates these relationships either in the United States or in Europe.

Given the methodological and data challenges, any assessment of potential consumer demand for certification programs is necessarily speculative. Nonetheless, the travel marketing experts all agreed that current consumer demand for certified products in the United States and Europe is secondary to concern about more traditional quality aspects at the current time. The relevant question, therefore, is how rapidly this demand might emerge over time and what can be done to accelerate it. The research literature and observations of the travel marketing experts suggests some steps that could be taken to promote sustainable travel certification programs to the consumer groups that will be most receptive to the message.

Methodology:

A quick preparatory review was undertaken of the literature on consumer demand for eco- and sustainable tourism and the potential derived demand for certification programs that focus on sustainability issues. Unfortunately there is no systematic research in the United States on the level and growth in U.S. demand for sustainable tourism certification programs per se. The research data is only somewhat better in Europe. As a result, the primary way to get a sense of the market was through structured interviews with a sample of experts.

Initial interview survey forms were developed and tested with a few U.S. experts in the industry. Following these initial tests, it was determined that several of the questions that attempted to derive quantitative estimates of the size of the potential market were beyond the capacity of the respondents to answer. As a result, these questions were dropped in favor of more qualitative questions, which the respondents felt more comfortable with. The questionnaire form that was ultimately used as the basis for the interviews is attached at the Appendix.

Although the number of interviews for the United States was small, the tourism marketing experts expressed quite similar views. These views are summarized below and tend to confirm the "conventional wisdom" in the industry that U.S. consumer demand for sustainable travel certification programs is minimal at the present time. It would, however, still be useful to confirm this conclusion and to develop quantitative information on the characteristics of the demand that does exist. This should be done by a large-scale, statistically valid intercept-type survey. The survey should interview passengers upon arrival at different destinations as to the determinants of their actual travel decisions, rather than generic attitude surveys taken in advance of any specific trip. Such intercept surveys are expensive and were not possible for this effort. As a result, until they can be undertaken, the following conclusions should be regarded as working hypotheses for designing and marketing sustainable travel certification programs.

Somewhat more systematic research has been undertaken on consumer demand for certified tourism products by European travelers. This research, however, also relies primarily on consumer surveys. While it suggests that there is considerable stated interest in sustainability issues, there is relatively little consumer awareness of certification programs. This may be partly because of the profusion of different eco-labeling schemes (although the VISIT scheme should help) and the lack of promotion, it also probably partly reflects the tendency of survey respondents to say the socially responsible things.

Results and Discussion:

Despite the lack of reliable market research on consumer demand for sustainable travel certification programs, the experts interviewed for this study all agreed that demand for sustainable travel certification programs by U.S. travelers is quite limited. The subjective judgment of the experts is consistent with the "conventional wisdom" in the industry and the limited evidence on actual consumer decision criteria from other countries[1].

The tourism marketing experts interviewed in the United States were aware of only a few of the sustainable tourism certification programs, and generally had little first-hand familiarity with them. This may have contributed to their doubts whether certification programs had been effective in raising consumer awareness of and demand for sustainable travel. In several cases individuals were also asked whether they personally had ever sought information about whether destinations or suppliers were certified under

[1] For example, "In a 2003 survey of 100 customers of tourism operations that have NEAP certification, not one client indicated that he or she had chosen the tour because of the accreditation of the product". Gary Price submission to an online forum on certification. www.planeta.com/ecotravel/tour/marketingcert.html.

various sustainable tourism certification programs before making their travel decisions. None had. This anecdotal evidence further suggests that traveler demand for sustainable tourism certification programs is still relatively limited, even among sophisticated travelers.

The U.S. experts believed that current demand for certification programs is weak primarily because U.S. travelers are typically most concerned with the immediate quality of their vacation experience (attractions, weather, food, accommodations) and prices. Only after travelers are assured that a particular destination or service supplier will meet these priority objectives are they likely to consider their sustainability practices. If all other elements are more or less the same, an unknown percentage of travelers may then make a final selection based on sustainability issues. Even for this segment, respondents were uncertain about what proportion of travelers would seek certified evidence of that sustainability performance rather than relying on less formal sources.

One of the challenges facing certification programs stems from the lack of operationally useful definitions of what constitutes “sustainable” tourism. As one of the respondents noted, sustainability is a bit like beauty, it is in the eye of the beholder. What appears sustainable to one person may not meet another person’s standards. As a result, it was noted that it is more difficult to certify sustainable tourism, because of its multi-faceted nature, than it is, for example, for organic foods or energy efficient appliances.

The U.S. experts were asked which types of sustainability considerations were likely to be most important in selecting destinations and suppliers (e.g., green technologies, nature conservation, social/cultural resource protection, local economic benefits). Several respondents made the common-sense observation that the priorities are likely to be quite different depending on the destination. Nonetheless, there was a consensus that consumers would ultimately be most interested in those aspects of sustainability that directly determine the quality of the vacation experience (i.e., the protecting the quality of natural and cultural resources). They predicted that “inside-the-fence” green technologies (e.g., renewable energy, water conservation) would not be as important in most cases since they have less direct impact on the quality of the vacation experience. This general conclusion about the relatively lower importance of green technologies was further reinforced by subsequent responses from industry participants (see report 3.1.3.3).

The U.S. marketing experts were asked what sources of information about sustainability they believed were likely to be most important to the socially-conscious traveler. Most felt that personal experience and word-of-mouth were the most important. This suggests that the ability of destinations and service suppliers to effectively promote their conservation activities may be more important than whether they participate in formal certification programs. Most felt that tour operators, guide books, and travel media would also be important sources of information about sustainability issues and effective promoters of certification programs. The marketing experts ranked certification programs relatively low as sources of information for consumers about the sustainability practices of destinations and suppliers.

Some reliable quantitative cross-section and time series data on sources of information used by U.S. travelers is available from the U.S. Government's annual survey of In-flight Survey of travel to and from the United States. A recent study of the U.S. ecotourism market used this data extensively (see WTO, 2001). This study defined ecotourists as anyone who reported participating in "an environmental or ecological excursion". The WTO study presents separate data for just ecotourists (a surrogate for eco-conscious travelers) and all U.S. outbound travelers. See the Appendix for some of this data. The Survey shows some interesting overall trends as well as differences between U.S. ecotourists and the average American international traveler. For example, the Survey showed that travel agents are the most important source of travel information, but that they declined dramatically as a source of information from 62% of all travelers in 1996 to 43% in 2002. Conversely, use of the Internet rose as a source of information from 4% to 29% in the same period.

The WTO study also revealed significant differences between ecotourists and the average American international traveler. For example, in 1999 (the last year that information is available for ecotourists), U.S. ecotourists were twice as likely to get information from the Internet as the average U.S. traveler (36% versus 16%). Ecotourists were more than four times as likely to get information from travel companies as the average traveler in that year (17% versus 4%). They were also three times more likely to get information from travel guides (18% versus 6%). This suggests that tour operators and travel guides are likely to be a considerably better source of information on certification for eco-conscious travelers than the averages would imply[2].

Opinions varied about the specific travel market segments that would be the best targets for consumer-oriented certification marketing initiatives. In general, the U.S. experts' recommendation was to target specialty markets such as ecotourism or educational travel when promoting certification programs directly to consumers, both because these segments are likely to be more responsive to the message and are small enough to allow focused marketing campaigns. One respondent was especially interested in the potential for focusing on "affinity groups", such as alumni, museum, and religious groups. He felt that these groups would provide an efficient vehicle for reaching like-minded individual travelers and that the institutions sponsoring the travel would often see sustainability and certification as reinforcing their core values and would, therefore, be more prone to promote them.

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[2] It is interesting to note that Robert Toth undertook a survey of sources of information on sustainable destinations, which resulted in quite different results from the WTO study. This is not surprising since the WTO results covered information for any purpose, whereas the Toth survey focused just on information regarding sustainability – a more relevant measure. He reported "… tallying the results of a worldwide survey of ecologically responsible travelers. They were asked how they determine prior to their trip whether a potential eco-enterprise meets their criteria for sustainability and safety. 35% said that they could not make that determination prior to the trip; 33% got recommendations from friends and travel agents; 14% cited web chat rooms and forums as reliable sources of information, and 8% contacted the destination by phone or email to verify their practices. … less than one percent depended on magazine articles." (Planeta, op cit)

Another observation was that certification will probably follow the typical product diffusion cycle[3]. That is, the product will first be tried by "innovators", who will then be followed by "early adopters". Only once these early adopters have created a degree of market recognition and acceptance will the majority of consumers move the market to a mature level. The observation was that the sustainable travel certification market is still probably only at the "innovator" stage in the United States. The key to moving ahead, if this is correct, is to identify a critical mass of potential early adopters and focus the marketing on them. Only then will the American market mature to the level of say Mobil or Michelin quality star guides for conventional travel or nutrition labeling for food.

The general sense among the U.S. experts was that Canadians and especially Europeans would be more receptive to certification marketing campaigns than Americans. Those that were asked to elaborate, however, could not provide any systematic evidence as to the likely degree of difference between Americans, Canadians, or Europeans. As a result, the study does not provide any basis for estimating the probable difference in effectiveness of marketing to the different nationalities.

The survey of European experience (Hamele, 2004) does support the contention that Europeans are somewhat more aware of and interested in certification in general. For example, studies have demonstrated that British, Dutch and German tourists expect a high environmental quality in their destinations, prefer eco-labeled accommodations, and would prefer to see certified products in travel catalogues. Nonetheless, awareness of current eco-labeling programs is quite low. (The exception is the 27% of travelers who are aware of the Blue Flag label – which is not that surprising in that Blue Flag indicates that quality of beach health and safety, and has a direct impact on the quality of the vacation experience).

Of the U.S. experts that had an opinion on whether the programs either advantaged or disadvantaged small and medium sized enterprises (SMEs), the sense was that the programs were much more likely to be used by larger and foreign-owned firms. This is primarily because of the direct costs and management burdens of participating in these schemes. A specific example was provided by a respondent who had been involved in creating an airline arrival brochure. The brochure was designed to promote sustainable travel in several South and Central American countries. They had looked specifically at Green Globe certification as a possible metric to use in their publication. However, they decided that Green Globe was not suitable because it imposed too high a cost and reporting burden on SMEs. Instead, they developed their own evaluation scheme, which was explicitly designed to be more suitable for smaller enterprises as well.

The European situation seems to be somewhat different in that a majority of (90%) of accommodations and catering services are micro (up to 10 employees), small (up to 50

[3] The most common Rogers model identifies five categories each one standard deviation wide around the mean of a normal distribution. This suggests 2.5% of consumers are "innovators", 13.5% are "early adopters", 34% are "early majority", 34% "late majority" and 16% are "laggards". The predictive value of the model has been challenged, but it serves as a useful shorthand for thinking about how a new product is adopted.

employees) or medium (up to 250 employees). As a result, it is felt that the fifty or so certification programs in Europe are aimed at the SME sector (Hamele, 2004). While this may cover the primary concerns of equity in Europe, it is likely that most people in the five target countries (Belize, Brazil, Costa Rica, Ecuador, and Guatemala) will remain concerned about equal access to certification opportunities in the region, especially for micro and community-based tourism firms.

On a positive note, several respondents observed that overall awareness of and concern about sustainability issues has been growing rapidly in the United States, so that demand for certification programs is likely to increase over time. Several of the experts also suggested that the lack of demand among travelers concerned with sustainability issues may also result from the lack of suitable certification "product". For example, one cautioned that the lack of consumer awareness about specific sustainability issues and lack of a widely recognized sustainable tourism certification brand might mask the existence of latent consumer demand. Thus, the potential for certification programs to significantly enhance sustainable behavior should not be ruled out once user-friendly certification programs are in place. In a loose sense, this might be a case where supply could help create its own demand.

Conclusions and Recommendations:

The basic conclusion from this report is that U.S. consumer demand for sustainable travel certification programs is currently quite limited. As a result, for the near term at least, the primary recommendation is that the focus of certification marketing programs in the United States should be on firms and intermediaries in the industry rather than directly to consumers. The marketing message to these U.S. travelers should emphasize the connection between eco-labeling and the overall quality of their vacation experience, more than the specific environmental or social indicators per se. Over time, as consumer awareness of sustainability challenges increases across the board, it may make sense to shift more of the focus to direct marketing to consumers and to give greater emphasis to sustainability issues.

The conclusions for the European market are essentially the same. An estimated 2-5% of consumers give high priority to environmental and sustainability aspects in their decision making process. These can be appealed to directly on the basis of sustainability arguments. An estimated 30-60% of European travelers are willing to take environmental and social considerations into account when booking travel, but only after priority has been given to more traditional quality considerations. In order to reach this wider tourist audience, eco-labeled products should be presented along side more traditional quality ratings and together with non-eco-labeled products.

The U.S. travel marketing experts suggested several avenues for reaching consumers. Given the expense of trying to reach consumers directly, one of the recommendations was that promoters of certification programs should identify "affinity groups" with a commitment to sustainability and to try to reach end-use consumers through them.

Examples are alumni, museum, conservation, and religious groups. Certification programs could help organizers of these groups to advance their institutional goals. As a result, they have an incentive to pass the message along to their members and to promote the concept of certification. In effect, they offer a wholesale vehicle for reaching the retail customer. People belonging to these groups are also likely to be the educated opinion leaders that constitute the early adopter group in the product diffusion cycle.

The data presented on sources of information used by U.S. eco-conscious travelers also suggests that it will be important to focus on tour operators and travel agents and to get them to patronize certified accommodations and local operators. The experts recognized that tour operators and travel agents serving the mass market would not be good candidates for promoting certified suppliers. A number of tour operators and travel agents, however, do specialize in the types of nature, cultural, and experiential travel of the type that the above-mentioned affinity groups prefer. As a result, promoters of certification programs should actively market to these intermediaries. They are the ones most likely to have clients who would be interested in patronizing certified establishments as well as being well-positioned to help promote the certification message. The fact that eco-conscious travelers made much heavier use of travel guide books than the average traveler also suggests that certification programs should be actively marketed to their authors and publishers in order to reach this priority market segment.

The comments of the U.S. marketing experts suggest several marketing themes that should be emphasized. For example, marketing messages should emphasize those aspects of sustainability that resonate most strongly with consumers. The respondents thought that preservation of the natural and cultural resources of the destination would typically be considerably more important than the use of green technologies (e.g., solar power or water conservation) to the typical traveler. These broader "outside the fence" impacts, however, do not seem to be the primary thrust of most certification programs. This is not surprising, given the origins of many certification programs as "green hotel" initiatives and the fact that these broader impacts are much harder to measure. Nonetheless, the marketing of certification programs should emphasize the broader sustainability aspects that will be most relevant and compelling to consumers if it is to be effective.

At the same time, several respondents emphasized that the relative importance of various dimensions of sustainability will vary depending on the nature of the attraction and its environment. Green technologies, for example, may be directly relevant for accommodations located in remote and fragile natural environments where there are no public utilities. Broader visitor impacts on wildlife and habitat will dominate in areas such as the Galapagos or Antarctic where carrying capacity concerns are paramount. The most important impacts may be on local cultures when projects are located in traditional, indigenous communities. In short, "one size fits all" certification schemes won't respond to the expectations of sophisticated travelers and these are the opinion leaders who need to be recruited. As a result, it was suggested the marketing messages (and ideally the underlying certification programs) should also be tailored to reflect the different aspects of sustainability that will be most relevant on a site-to-site basis.

To the extent that it does make sense to market directly to consumers, it will also be important to create a trusted and recognized "brand". The current profusion of certification schemes, and lack of a common accreditation logo, complicates the challenge of creating a brand identity. Several experts suggested the importance of drawing on the credibility of entities that are respected for their commitment to sustainability. Instead of focusing on the details of particular certification schemes, which are probably viewed as "black boxes" by the consumer anyway, they felt that teaming with credible marketing partners would be important. Respected government agencies or international NGOs can be good partners. Interestingly, the industry participants felt that respected private companies such as Patagonia, Whole Foods, REI or The Body Shop would provide even greater consumer recognition and credibility. This credibility by association, they felt, would be more important than the rigor of any particular certification scheme.

All the U.S. respondents thought that small and medium size enterprises (SMEs) are disadvantaged by current certification schemes because of the cost and complexity of implementing them and the lack of a clear, immediate payoff from participating in terms of increased business and profitability. In addition, the special problems of small community-based and home-stay programs where proprietors may not even be literate and don't have a clear understanding of international market demands. As a result, several suggested the importance of following a systems approach to certification, whereby disadvantaged participants can receive integrated packages of technical, financial, and marketing assistance. As one respondent noted, these small players "don't understand the need for certification, can't afford it, and don't know the message to give to their customers". To be effective in creating consumer demand for small enterprises, therefore, certification programs should provide access to credit, and access to knowledge as well as access to markets. This type of comprehensive support could be provided by governments, NGOs, and international development agencies.

Finally, although not specifically asked of the experts, it would probably be difficult for the five target countries to capture the benefits from general consumer education programs promoting sustainable travel certification programs. Each of the countries comprises a small share of the overall tourism market. Any consumer demand that they could create through general education programs would benefit many other sustainable destinations as well, thereby diluting the effectiveness of a single country's marketing program. Accordingly, general consumer demand creation initiatives are likely to be more effective if coordinated, funded and implemented by NGOs and International Organizations with a global or at least regional mandate. The individual countries should, therefore, presumably concentrate on marketing their certification programs to specific affinity groups, tour operators, travel agents, and travel guides that are oriented to their particular country. They should leave broader consumer education programs to the international community.

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Interviews:

Connie Cornelius, Tourism Marketing Consultant, Denver, Colorado

Rona Fried, Publisher, SustainableBusiness.com

Charles Goeldner, Professor of Tourism and Marketing, Leeds School of Business, University of Colorado at Boulder.

Sara Gutterman, former COO Natural Capitalism Group

Patrick Long, Director, Center for Sustainable Tourism, University of Colorado at Boulder

Brian Mullis, President, Sustainable Travel International

Laurel Neylon, Vice-President, Global Plateau

Judy Walden, Principal, Walden Mills Group.

Sue Wood, President, Wood Communications, Inc.

APPENDIX A: INTERVIEW QUESTIONNAIRE

QUESTIONNAIRE #1
For Use With Tourism Demand Experts And Consumer Advocacy Organizations

Person Interviewed: ______________________________

1. Are you familiar with any certification programs that deal directly with the sustainability aspects of tourism? Which ones?

2. How effective do you believe that each of these programs has been in terms of raising consumer awareness of and demand for sustainable travel? **(Please rank high, medium, low)**

3. Have any of these programs been more or less effective than others in encouraging patronage of small and medium-size enterprises (SMEs)? Why?

4. In general, how strong is consumer demand for formal programs certifying the sustainability practices of travel suppliers **(high, medium, low)**?

5. Are there specific market segments where consumer demand for formal certification programs is likely to be significantly higher? How much higher **(very much, moderately, somewhat)**?
   - Various specialty markets (e.g. educational or ecotourism)?
   - Independent versus group travelers?
   - Various nationalities?
   - Business (through corporate travel departments) versus leisure travelers?

6. Which sustainability considerations are likely to be most important to the socially responsible traveler when selecting a destination or tour operator? **(high, medium, low)**

- On-site green technologies /eco-efficiency (e.g., energy and water conservation, waste management practices) ____,
- Broader nature conservation efforts (protecting endangered environments or wildlife) ____,
- Generating local economic benefits and reducing local poverty ____,
- Preserving local social and cultural resources ____,
- Other (please specify) ____.

7. How important are various sources of information about the sustainability practices of destinations, suppliers and operators to the socially responsible traveler? **(high, medium, low)**

- Personal experience ____,
- Word of mouth ____,
- Company promotional literature ____,
- Formal certification programs ____,
- Internet ____,
- Travel agents ____,
- Tour operators ____,
- Travel press ____,
- Guidebooks ____,
- Other ____.

8. For the socially responsible traveler, do you believe that it would be more effective to focus just on the sustainability criteria or would it be better to try to combine sustainability ratings with broader quality rating systems (e.g., star ratings)? Why?

9. What specific marketing strategies would you recommend for increasing consumer demand for information about sustainability practices in the tourism sector, especially for small and medium size tourism enterprises?

APPENDIX B: IN-FLIGHT SURVEY DATA

INFORMATION SOURCES USED BY U.S. OUTBOUND AIR TRAVELERS
Percentage of Number of Respondents

	All	Travelers		Eco	Tourists
	1996	**1999**	**2002**	**1996**	**1999**
Number of Respondents	**36,125**	**36,521**	**na**	**1,034**	**1,030**
Airline Directly	21.1	23.6	26%	19.2	24.5
Corporate Travel Dept.	9.3	9.5	9%	2.2	1.8
Personal Computer	4.2	16.0	29%	5.5	35.8
Friends or Relatives	16.6	15.7	15%	25.4	22.3
In-flight Info. Systems	0.6	0.8	na	0.5	1.5
Nat'l Govt. Tourist Office	1.9	1.6	na	4.1	4.4
Newspapers/Magazines	4.2	3.2	3%	8.8	7.8
State/City Travel Office	2.5	2.3	2%	3.5	1.3
Tour Company	5.0	4.2	4%	19.4	17.1
Travel Agency	61.5	54.5	43%	60.2	55.5
Travel Guides	6.7	6.0	6%	12.7	17.6
TV/Radio	0.9	0.6	na	0.8	1.4

Sources: For 1996 and 1999, the information is from the World Tourism Organization Special Report, The U.S. Ecotourism Market (Madrid, 2001). The information was derived from a special analysis of the data collected in the U.S. Commerce Department's annual In-Flight Survey of U.S. Travelers to Overseas and Mexico.

The 2002 information is based on the same In-flight Survey. However, no special run has been commissioned (costs about $2,000) that would allow separate information on ecotourists or down to tenths of a percent. The 2002 survey dropped the categories of "In-flight Info. Services", "National Government Tourist Office", and "TV/Radio", presumably because the responses were so small.