



Center for Responsible Travel

Transforming the Way the World Travels

# The Case for Responsible Travel: Trends & Statistics 2016

International tourist arrivals (overnight visitors) grew by 4.4% in 2015, reaching a total of 1,184 million in 2015. Some 50 million more tourists traveled internationally in 2015 than in 2014, and 2015 marked the 6th consecutive year of above-average growth since the 2009 economic crisis.<sup>1</sup> The UN World Tourism Organization (UNWTO) Confidence Index predicts a continuation of growth in international tourism in 2016.<sup>2</sup>

The travel industry contributed US\$7.2 trillion or 9.8% to world GDP in 2015, and is forecast to grow by 4% per annum over the next ten years. Leisure spending represents 77% of travel & tourism GDP, with business spending contributing 23%. Travel and tourism also provided 284 million jobs (direct, indirect, and induced) in 2015, representing 9.5% of total employment or 1 in 11 jobs in the world.<sup>3</sup>

“International tourism reached new heights in 2015. The robust performance of the sector is contributing to economic growth and job creation in many parts of the world,” says UNWTO Secretary-General, Taleb Rifai. “It is thus critical for countries to promote policies that foster the continued growth of tourism... including sustainability.”<sup>4</sup>

## Tourism Terms

Responsible Travel is one of several closely related terms that are ethically based. In addition, as the final section of this report demonstrates, a growing number of niche markets also promote responsible tourism.

CATEGORY	DEFINITION
<b>Ecotourism</b>	Responsible travel to natural areas that conserves the environment and improves the welfare of local people. <sup>5</sup>
<b>Ethical Tourism</b>	Tourism in a destination where ethical issues are the key driver, e.g. social injustice, human rights, animal welfare, or the environment. <sup>6</sup>
<b>Geotourism</b>	Tourism that sustains or enhances the geographical character of a place – its environment, heritage, aesthetics, culture and well-being of its residents. <sup>7</sup>
<b>Pro-Poor Tourism</b>	Tourism that results in increased net benefit for the poor people in a destination. <sup>8</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 or species. <sup>9</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, biological diversity, and life support systems. <sup>10</sup>

## The Role of Responsible Travel

The social and environmental imperative for responsible travel is growing as the global inequality crisis is reaching new extremes and the wide range of climate change impacts are increasingly apparent. According to Oxfam International, the richest 1% now have more wealth than the rest of the world combined, and just 62 individuals had the same wealth as 3.6 billion people – the bottom half of humanity.<sup>11</sup> However, the proportion of the world's population living in extreme poverty did fall from 36% in 1990 to 16% in 2010. Encouraged by this progress, in 2015 the world's leaders committed to eradicating extreme poverty by 2030 as part of the Sustainable Development Goals (SDGs).<sup>12</sup> Tourism is explicitly mentioned within Goal 12, which focuses on sustainable consumption and production (SCP) patterns, as well as in a number of other SDG targets.<sup>13</sup>

In terms of climate change, the earth's surface temperatures in 2015 were the warmest since modern record keeping began in 1880, and globally the average 2015 temperatures shattered the previous mark set in 2014.<sup>14</sup> While the world's poorest people live in areas most vulnerable to climate change, the poorest half of the global population are responsible for only about 10% of total global emissions. The average footprint of the richest 1% could be as much as 175 times that of the poorest 10%.<sup>15</sup>

The world community has, however, begun to take the crisis seriously: In December 2015, 196 nations attending the COP21 summit in Paris voted to take steps "to limit temperature increase to 1.5 degrees Celsius", and developed countries agreed to create a \$100 billion a year fund to help developing countries switch from fossil fuels to greener sources. The agreement has to be endorsed by each of the respective governments.<sup>16</sup>



Guests take part in a trekking adventure  
Source: Country Walkers

Tourism, as the largest global service industry and one of the top industries for developing countries, has an important role to play in the response to climate change. The tourism sector today accounts for 5% of global CO<sup>2</sup> emissions but may be higher (up to 14%) if measured as radiative forcing, i.e. the warming caused by CO<sup>2</sup> as well as other greenhouse gases. By 2035 and if no action is taken, the CO<sup>2</sup> emission generated by tourism will be more than three times higher than today.<sup>17</sup> In this sense, there is a clear call for action for the tourism sector and countries to move towards a low carbon and inclusive green tourism economy.

Tourism is growing most rapidly in developing countries: between 2010 and 2030, arrivals in emerging destinations are expected to increase at twice the rate (+4.4% a year) of those in advanced economies (+2.2% a year).<sup>18</sup> Fortunately, as this report demonstrates, the growth in responsible tourism continues to outpace the growth of the tourism industry as a whole.

## Consumer Demand for Responsible Travel

Recent surveys and market studies document the sustained interest among consumers in types of tourism and tourism products that help to protect the environment and bring tangible benefits to local communities.

### Experts say...

"Our groundbreaking survey demonstrates that travelers who give hold the key to more sustainable tourism: for more meaningful travel for the public, for more responsive travel companies, and for travelers and the tourism industry to work together to better sustain the destination communities they care for." --Mike Rea, CEO, *Tourism Cares*<sup>19</sup>

"Young people are living more structured lives than ever before, and as we move towards 2020, the days of carefree, spontaneous travel will disappear in favor of more organized, planned and researched trips. Students and young travelers will continue to be trailblazers, craving adventure and experiences they can share, but they will also be very aware of how their travel will contribute to the rest of their lives. Working abroad, voluntary and conservation projects, and learning something new will all be high on the travel agenda." --John Constable, *Managing Director, STA Travel*<sup>20</sup>

"Canadian travelers are looking to extend their green lifestyles while traveling, not wanting to abandon organic food or caring about the environment when around the globe." --Bruce Poon Tip, *Founder and CEO, G Adventures*<sup>21</sup>

## Surveys and Statistics show...

The 2015 “Good Travels” survey by Tourism Cares found 55% (1405 respondents) said that they volunteered or contributed financially or in-kind to a destination they had visited in the last two years. Travelers also stated they want spending and giving to help the places they visit: 72% said their travel giving is “important,” “very important”, or “extremely important.”<sup>22</sup>

Volunteer trips are a promising niche within family travel. 10% of families in the U.S. Family Travel Survey had taken a volunteer trip (2614 respondents). Within this group, 72% said they will take another volunteer trip in the future. Of the respondents who had not taken a family volunteer trip yet, 22% responded they were planning to take one in the future.<sup>23</sup>

According to the Association of British Travel Agents (ABTA), spending on holidays has been increasing in recent years in line with the economic recovery. 2016 looks set to continue into next year, with 23% expecting to spend more on their holidays, up from 20% in 2015.<sup>24</sup>

‘Living like a local’ has become an essential part of getting under the skin of a destination for many travelers. They are looking for more authentic holiday experiences and many holiday companies are now offering people the chance to enjoy hidden gems alongside traditional tourist attractions.<sup>25</sup>

Globally, 69% of travelers plan on trying something new in 2016, 15% want to try adventure travel for the first time, and 47% say they have visited destinations because of the people and culture of specific countries.<sup>26</sup>

Of more than 25 million U.S. travelers who vacationed overseas in 2014, 82% went for sightseeing, 46% visited small towns or the countryside, 33% were interested in cultural/ethnic heritage sights, and 8% went for environmental/ecological excursions.<sup>27</sup>

Europeans have expressed wide support for enforcement of the EU’s current legal framework on protection of nature. The 2015 Eurobarometer further confirmed that more than 80% of Europeans are concerned about the loss of biodiversity.<sup>28</sup>

Nature-based tourism accounts for about 20% of total international travel and continues to grow, according to the UNWTO.<sup>29</sup>

According to a 2015 study by Conservation International, Rainforest Alliance, and UNEP, tropical forests are a key natural attraction, and tropical forest tours may include one or more of the following: “bird watching and wildlife viewing, hiking, camping and nature walks, horseback riding, cycling and mountain biking, and, in some areas, freshwater fishing,

canoeing, kayaking, rafting and river tours. Environmental education and interpretation is about communicating ideas and messages that increase visitor awareness, knowledge, understanding, and appreciation of the social, natural, and cultural characteristics of a destination.”<sup>30</sup>

Research studies continue to show that travelers prefer companies that embed green or eco-friendly practices into their operations. Travelers are coming to expect that tourism businesses will become sustainable in the same way they expect free Wi-Fi connectivity in hotels or online check-in for air travel.<sup>31</sup>

The percentage of consumers who are willing to pay more for sustainable brands that showed commitment to social and environmental values went up from 55% to 66% between 2014 and 2015. About 73% of the younger generations -- Millennials and Generation Z -- are more likely to pay more for sustainability, compared to 51% of Baby Boomers.<sup>32</sup>

During the past ten years, tourism dynamics have been radically altered. The consolidation of globalization, the generalized use of information and communication technologies (ICTs), progress in transportation infrastructures, changes in clients’ habits and preferences, and their huge power as opinion leaders on social networks are changing the dynamics of supply and demand within the tourism market.<sup>33</sup>

There is a consensus among specialists that we are currently experiencing a “New Tourism.” These new tourists have a higher level of environmental and cultural awareness, which means that, as a result of the generalization of ICTs and social networks, they are more demanding, more able to influence, and have their say on the products that they consume.<sup>34</sup>



Travelers take part in an environmental give-back project  
Source: Center for Responsible Travel (CREST)

Animal welfare in tourism has been pushed forward in large part due to demand by travelers. In November 2015, SeaWorld announced plans to phase out controversial killer whale shows following consumer protest after the 2013 documentary *Blackfish* was released.<sup>35</sup> Big game hunting fell under scrutiny after the killing of famed resident lion, Cecil, in Hwange Game Reserve, in Zimbabwe, causing a number of global airlines to refuse to ship exotic hunting trophies.<sup>36</sup>

Elephant-riding tourism drew vast criticism after a number of, sometimes violent, tourism incidents. In Thailand, an elephant killed its handler and ran into the jungle with a family of tourists still on its back, causing the industry to further consider appropriate interactions with animals. A number of tour operators have already integrated animal welfare policies into their operational guidelines.<sup>37</sup>

## The Business Case for Responsible Tourism

Sustainability is becoming much more mainstream within the tourism industry, with increasing numbers of businesses creating environmental departments, adopting environmental and social 'good practices', seeking certification, mitigating and adapting to climate change realities, and looking at ways to 'green' their supply chain.

### Experts say...

"We believe that a strong commitment to sustainability is required to compete in today's increasingly globalized world, and good CSR practices should not be about how a company donates funds on philanthropic efforts, but rather how it generates revenue through responsible and ethical business practices while meeting the expectations of all stakeholders – the guests, the staff, the shareholders and the local community."

--Krip Rojanastien, Chairman & CEO, Chiva-Som International Health Resorts Co., Ltd.<sup>38</sup>



Hotels are able to tread lightly on the land by building with, and not destroying, the natural environment

Source: Island Outpost's GoldenEye, Jamaica

I have been in the industry for 18 years, and yet I have seen more interest and uptake [related to sustainable investments] over the past 18 months than I saw over the previous 16½ years."

--Joseph Keefe, President and Chief Executive, Pax World Funds, a sustainable-investing fund group<sup>39</sup>

The massive impact that climate change will have on tourism destinations and tourism businesses has only just begun to sink in. Add to that rising energy prices, water shortages, declining biodiversity, let alone concerns about wages, human rights and basic entitlements for employees in the tourism industry, and it looks very much like a 'perfect storm' of pressures. All the more reason to look to the industry leaders [who are] putting the practice of sustainable tourism at the heart of their enterprises. This is now a fast-moving, extremely dynamic area: those that get it right will thrive; those that don't will perish.

--Jonathon Porritt, Co-Founder and Program Director, Forum for the Future<sup>40</sup>

### Surveys and Statistics show...

Among agents that book meetings and incentives travel, 79% reported that demand for healthier corporate/business meetings (i.e., meetings with healthy food, fitness and spa experiences, access to nature, etc.) is a rising trend in 2015.<sup>41</sup>

Nine in 10 of USTOA tour operator members anticipate a growth in sales in 2016 with more than half (57%) "optimistic" and forecasting a "boom year" with growth anywhere from seven to 10% or higher.<sup>42</sup>

In response to growing demand by tourists for environmentally and socially responsible products and services, marine- and coastal-based tour operators are increasingly seeking to improve their environmental and social performance, both by changing their own practices and by contracting with marine recreation providers that follow recognized good practices.<sup>43</sup>

The use of good practices also makes good business sense, as tourists are increasingly showing a preference for products and suppliers that demonstrate good social and environmental performance. By improving its performance in these areas, a tour operator can enhance its reputation and recognition in the marketplace as a responsible operator.<sup>44</sup>

"A growing number of businesses are advocating for a more sustainable and efficient use of natural resources as central for their development, showing that through dialogue between stakeholders, nature and business can thrive side by side," states a 2015 study.<sup>45</sup>

Trip Advisor found 3 in 4 business owners are optimistic about profitability in 2016.<sup>46</sup>

According to a 2015 World Travel & Tourism Council (WTTC) study, "The next 20 years will be characterized by our sector fully integrating climate change and related issues into business strategy, supporting the global transition to a low carbon economy, strengthening resilience at a local level against climate risks, promoting the value of responsible travel, and greening entire supply chains."<sup>47</sup>

A snapshot of WTTC members records:

- Over 60 publicly reporting Environmental, Social, and Governance (ESG) disclosure;
- Over 55 have set carbon emission or energy reduction targets;
- Over 40 are using renewable energy in their operations;
- Over 25 have implemented carbon management or offsetting programs.<sup>48</sup>

When looking at reporting, WTTC finds "Transparent public reporting on material environmental, social and governance (ESG) risks, opportunities, and performance is now both a common practice within, and even an expectation of, companies across all sectors, including those in Travel & Tourism... Of the 250 largest global companies, 93% reported on ESG performance in 2013."<sup>49</sup>

A 2015 report on convention centers found that 70% of respondents have a dedicated Sustainability Coordinator or Sustainability Manager on staff, 77% have an employee 'green team', and 85% participate in sustainability programs or initiatives and take an active role in shaping the sustainable development of their community. In addition, 90% have either achieved or are actively seeking a sustainability-related certification.<sup>50</sup>

Nearly two-thirds of conference venues have electric car charging stations for employees and attendees, 87% have secure bike parking onsite, 33% have a green roof installed on the building, and 42% produce renewable energy onsite, while 59% procure offsite renewable energy. The most popular source of offsite renewable energy is wind.<sup>51</sup>

UNEP affirms that for businesses that embrace mitigation and are pro-active in addressing climate change, "there will be new business opportunities. Current societal trends have already created new markets for low-carbon tourism products, and these markets can be expected to grow in the future. Doing sustainable tourism business in the era of climate change is not just politically correct; it is a competitive advantage."<sup>52</sup>



The International Civil Aviation Organization (ICAO) CO<sup>2</sup> Efficiency Standard is to come into force from 2020 to ensure that CO<sup>2</sup> emissions from new aircraft will have to meet a minimum baseline. From 2023 this will also apply to existing aircraft designs still in manufacture at that date.<sup>53</sup>

Responsible tourism businesses continue to receive accolades for best-practices within the industry. Annual internationally recognized awards programs include: World Responsible Tourism Awards at World Travel Market, Skål International Sustainable Tourism Awards by Diversey Care, and World Travel & Tourism Council's Tourism for Tomorrow Awards.

'Green' tourism businesses continue to receive differentiation in popular online travel search and booking engines, including TripAdvisor GreenLeaders, Travelocity, and Expedia. Travel bloggers focused on ecotourism, cultural-heritage tourism, and unique vacation experiences continue to gain traction.

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

- Starwood Hotels and Resorts has announced major Global Citizenship goals: a 30% reduction in energy, a 20% reduction in water consumption, and a 30% reduction in GHG emissions per built hotel room by 2020.<sup>54</sup>
- In December 2014, JetBlue partnered with The Ocean Foundation and A.T. Kearney to release the study "EcoEarnings: A Shore Thing," which "marks the first study to directly correlate the long-term health of the Caribbean shorelines to JetBlue's investment in the region and bottom-line."<sup>55</sup>
- Soneva Fushi Resort in the Maldives was able to cut food waste by 50% after a comprehensive food waste audit led by LightBlue Environmental Consulting Company.<sup>56</sup> According to LightBlue, "A standard 4-star all-inclusive beach resort that serves 45,000 meals per month can waste up to 154,767 kilos of food per year, enough to feed 22,319 families of four! The true cost of food waste, including energy, water and labour cost, can reach a staggering \$ 700,000 per year for one 5-star hotel."<sup>57</sup>
- In 2013, Chiva-Som resort in Thailand worked with the Clinton Climate Initiative's Energy Efficiency Building Retrofit Program. The results included that lighting and air conditioning systems were replaced resulting in a 26% reduction in monthly electricity consumption and a related 20% reduction in carbon footprint.<sup>58</sup>
- The Rainforest Ecolodge in Sri Lanka became the first hotel in the country and the fifth in the world to be awarded the LEED Platinum Certification (Leadership in energy and Environmental Design) by the US Green Building Council (USGBC). This is the first accommodation in Sri Lanka which has been crafted using recycled shipping containers as the shell of each individual lodging facility.<sup>59</sup>

# The Destination Case for Responsible Tourism

In recent years, increasing attention has been focused on protecting and enhancing environmental and social sustainability within entire tourism destinations, and not simply within individual businesses. Tools for measuring and criteria for certifying 'green' destinations are gradually being developed, including by UNWTO, European Union, National Geographic's Geotourism Program, Global Sustainable Tourism Council (GSTC), Ethical Travelers, EarthCheck, Green Globe, and Sustainable Travel International.

## Experts say...

"Awareness by destination managers is growing rapidly that they have a role to play in managing for sustainability, encouraging or directing private sector travel providers to do the same, and that travelers and travel providers are increasingly expecting sustainable practices to be in place."

--Randy Durband, CEO, Global Sustainable Tourism Council (GSTC)<sup>60</sup>

"The biggest challenge for tourism destinations in the next decades is the increasing demand for transparency and accountability in monitoring and measuring tourism performance. National leaders can demand that cities, civil society and companies report on sustainability, including environmental, social and labor issues, respect for human rights, anti-corruption and bribery matters, to meet global commitments to the 2030 Sustainable Development and Climate Agenda. Establishing good governance mechanisms and developing tools at local levels to monitor sustainable tourism performance has become a key issue to address."

--Helena Rey, Programme Officer, UNEP<sup>61</sup>

"As destination rating systems continue to develop, awareness is growing among local leaders that insuring environmental and cultural sustainability is not only a responsible policy but also a long-term economic strategy. Protecting and celebrating natural, cultural, scenic, and historic assets means safeguarding a destination's unique selling point: its identity—a sense of place that no competitor can match."

--Jonathan Tourtellot, National Geographic Fellow Emeritus<sup>62</sup>

"With international travel expected to rise, protected areas are likely to come under increasing pressure from tourism. Managing the impacts from these visitors as well as the opportunities for conservation is key to securing long-term protection for these critical areas."

--Giulia Carbone, Deputy Director, Global Business and Biodiversity Programme, IUCN<sup>63</sup>

## Surveys and Statistics Show...

As we move further into the third millennium, the issues and challenges facing both governments and the Travel & Tourism sector will become much broader and, therefore, even more difficult to address without a more holistic approach to tourism governance, as well as close public-private sector co-operation. It is clear that a growing number of governments in both developed and emerging economies have been strengthening their institutional arrangements for tourism policy formulation and implementation.<sup>64</sup>

The US Tour Operators Association named Cuba its top emerging/off-the-beaten path destination followed by Myanmar, Iceland, Colombia, Ethiopia, and Japan.<sup>65</sup>

In 2016, Ethical Traveler's list of The World's Ten Best Ethical Destinations includes: Cabo Verde, Panama, Dominica, Samoa, Grenada, Tonga, Micronesia (Federated States), Tuvalu, Mongolia, and Uruguay. These countries as 2016 Ethical Destinations have all carried out significant efforts to switch to green energy. Many also have a strong strategy to tackle climate change.<sup>66</sup>

"Sustainable tourism is increasingly recognized as a key component for promoting conservation in protected areas. IUCN has shown that increasing the number of visitors to protected areas can be an effective tool for enhancing stewardship, revenues and community development, provided well-functioning management systems are in place. Going forward, it will be important to strengthen visitor management systems, including measures on how best to protect these key natural and cultural assets."<sup>67</sup>

A 2012 study by the Travel Foundation states further that regarding "the overall issue of who is responsible for protecting the destination as a tourism product, a more holistic approach is now emerging – the idea of destination partnerships. Rather than any one party being responsible for protecting a destination, this is a multi-stakeholder approach whereby all parties interested in a destination as a resource look at how they can work together to achieve a common goal of sustainability."<sup>68</sup>



Coral restoration projects combat the loss of coral reefs in the Dominican Republic  
Source: Puntacana Resort & Club

2015 research on the impact of TUI Group's tourism operations based around six hotels in Cyprus shows the importance of going beyond basic impact measurements. For instance, tourism tax receipts were found to be a very significant benefit for Cyprus, equivalent to €25 per customer per night. Furthermore, a significant amount of the total impact of tourism was found to come "indirectly" from supply chain activities. Supply chains and other services used by customers generated almost 14 times more waste than the hotels themselves (25kg of rubbish came from the supply chain compared with 1.8kg of rubbish per customer per night from hotels).<sup>69</sup>

Increasingly, destinations are being recognized for efforts in responsible tourism. As a follow-up to *National Geographic Traveler's* Destination Stewardship surveys (2004 – 2010), Green Destinations releases an annual *Sustainable Destinations Top 100*. According to Green Destinations, "Candidates include destinations that cherish and celebrate their Authenticity, their Biodiversity and nature, their Cultural values, the Destination's local community and entrepreneurs, and their Environment, for future generations of citizens and travellers" and are selected by experts in the field of responsible travel.<sup>70</sup>

"To satisfy the definition of sustainable tourism, destinations must take an interdisciplinary, holistic and integrative approach which includes four main objectives: (i) demonstrate sustainable destination management; (ii) maximize social and economic benefits for the host community and minimize negative impacts; (iii) maximize benefits to communities, visitors, and cultural heritage and minimize impacts; and (iv) maximize benefits to the environment and minimize negative impacts," according to the Global Sustainable Tourism Criteria for Destinations.<sup>71</sup>

The following are additional examples that showcase destinations and their sustainability efforts:

- Ljubljana, Slovenia, was selected for the 2015 Destination Award in the World Travel & Tourism Council's Tourism for Tomorrow Awards. With a strategic sustainable development plan to make the city more appealing to tourists, Ljubljana has also become a better place to live. A major effort to limit automobile traffic over the past decade resulted in the increase of pedestrian zones by almost 620%. An ecological zone was created in the city



Southern Sinaloa state, Mexico has joined the small group of destinations that have been assessed based on the Global Sustainable Tourism Council (GSTC) criteria.

center, and about 46% of the city is forested. "Surveys measure how satisfied locals are with the presence of tourists; and the community is included in the planning process, and regularly informed of developments."<sup>72</sup>

- For the fifth year in a row, Charleston, South Carolina, was selected as the No. 1 Small U.S. City by *Condé Nast Traveler's* 2015 Readers' Choice Awards. Helen Hill, Executive Director of the Charleston Area CVB, says "The Charleston area continues to deliver on the promise of genuine hospitality, world class cuisine, and an authentic travel experience."<sup>73</sup>
- The Moroccan government has developed ambitious tourism strategies to preserve and enhance its natural heritage, water, and energy, through the integration of sustainable development and climate change components in all its public policies and development projects. This includes a Charter for Sustainable Tourism to guide tourism operations in Morocco, the 2nd largest tourism destination in Africa.<sup>74</sup>
- Basecamp Explorer Kenya is a destination-wide project which is committed to enhancing the welfare of the Maasai community. Started in 2003, the project benefits 118 local Maasai women who sell handicrafts made of recycled items, local leather, and beads, thus earning cash incomes. Basecamp has also initiated the formation of the Mara Naboisho Community Conservancy which provides guaranteed monthly income to over 500 Maasai landowners and employment opportunities to over 300 local Maasai people living around Naboisho. To date, 96% of the employees at Basecamp are from the local Maasai community, further providing economic stability.<sup>75</sup>
- Named as one of the world's ten best ethical destinations in 2016 by Ethical Traveler, "Uruguay supplied 90% of its electricity from renewable sources this year, and is also working toward powering all public transport with electric energy, as well as creating the world's first fully sustainable airport." Uruguay has also "brought the law to the side of animals by issuing a legal decree ensuring all animals in that country are entitled to the Five Freedoms: freedom from hunger and thirst, freedom from discomfort, freedom from pain, suffering and disease, freedom from fear and distress, and freedom to express normal behavior."<sup>76</sup>
- The Caribbean Challenge Initiative (CCI) includes nine Caribbean governments, 15 corporations, and about 30 partner organizations that have made "bold commitments to protecting and preserving the region's marine and coastal environments."<sup>77</sup> The Caribbean is the most tourism dependent regions in the world, with the industry directly and indirectly supporting 14.8% of employment in 2014.<sup>78</sup> Its tourism industry remain largely dependent on coastal and marine environments.

The two overarching Caribbean Challenge Initiative goals are: to protect at least 20% of the Caribbean's marine and coastal environment by 2020, and to have in place fully functioning sustainable finance mechanisms that will provide long-term and reliable funding to conserve and sustainably manage the marine and coastal resources and the environment.<sup>79</sup>

## Niche Markets and Responsible Tourism

According to the UNWTO, we are currently experiencing an increasingly segmented market and new groups of consumers who have specific and varied interests and needs. The following are some of the most vibrant of these new niche markets which reflect the strength and diversity of responsible travel.

### Adventure Tourism

Adventure tourism is a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. It can be divided into hard adventure (such as caving, climbing and trekking) or soft adventure (such as camping, hiking, birdwatching, rafting, snorkeling, surfing, etc.).<sup>80</sup>

#### Experts Say...

"Adventure travelers prize well managed natural environments, engagement with local communities, along with the thrill of pushing their physical limits. From our surveys of adventure tour operators, we estimate that 65% of an adventure trip cost remains in the region."

--Christina Beckmann, Research and Adventure EDU Director, Adventure Travel Trade Association<sup>81</sup>

#### Surveys and Statistics show...

Adventure tourism, valued at \$263 billion is one of the fastest growing categories of tourism that attracts high value customers, supports local economies, and encourages sustainable practices. From 2009 to 2012, the adventure travel market had an estimated average yearly growth of 65% in Europe, North America, and South America.<sup>82</sup>

Adventure operators have reported an average of US\$3,000 spent per person, with an average trip length of eight days. US adventure tour operators polled estimated that 65.6% of the total trip cost from an adventure package remains in the destinations visited. In comparison, the United Nations Environment Programme (UNEP) have estimated that in most all-inclusive mass tourism package tours, about 80% of travelers' expenditures go to the airlines, hotels, and other international companies instead of to local businesses or workers.<sup>83</sup>

Adventure tourism and trekking continues to attract travelers interested in nature and in local community meetings. Eco-tourism is doing well despite the economic crisis, which has affected less the higher income travelers.<sup>84</sup>

The environmental impacts of some adventure activities may be more severe than those from hiking and walking, because of the repeated and heavy use of equipment on the landscape. Wheels, hooves, ropes and hooks can all cause significant damage to the landscapes, creek beds, vegetation, rock and cave formations on which they are used, particularly if the equipment is of a poor standard or used incorrectly or inappropriately. This demonstrates the need for better training and resource management.<sup>85</sup>

"We believe in experiential giving, in sharing experiences with people," says Allison Fleece, Founder of Women High On Adventure (WHOA). "We do this by sponsoring local women to hike and adventure with us. Sharing experiences with local women has become a unique and special way for everyone to learn and empower each other through interaction and personal connection."<sup>86</sup>

### Agritourism

Agritourism or agro-tourism is a form of rural tourism in which tourists see and participate in traditional agricultural practices without destroying the ecosystems.<sup>87</sup>

#### Experts Say...

"[Agritourism] is the heart and soul of rural economic development. You see [rural families] utilizing their land and offering their experiences for people to come and enjoy, thus producing a better situation economically for these small communities. It's very neat to watch it all develop."

--Lori Coats, Western Oklahoma Coordinator, Oklahoma Agritourism<sup>88</sup>

#### Surveys and Statistics show...

Between 1997 and 2007, nature- and agricultural-based tourism was the fastest growing sector of the US travel and tourism industry.<sup>89</sup> Rural tourism growth in Europe is three times greater than the increase in tourism in general.<sup>90</sup>



Agritourism grows in popularity as travelers look to experience local life.  
Source: Cuba Educational Travel

Agritourism is "repositioning of the agricultural sector to maximize the integration of indigenous food, culture, wellness and the environment into a sustainable tourism experience," according to the Inter American Institute for Cooperation on Agriculture (IICA). Key elements include farm-based tourism, community tourism, agro-heritage tourism, agro-trade (agribusiness), culinary tourism, and health and wellness tourism.<sup>91</sup>

The 2007 U.S. Census of Agriculture showed that income from agritourism and recreational services nationwide grew from \$202 million in 2002 to over \$566 million in 2007.<sup>92</sup>

The National Tour Association estimates that 62 million people in the US visit or stay overnight each year on farms, ranches, and wineries.<sup>93</sup>

According to a 2015 survey, 32% of Canadians vacationing in Europe said they would be likely to engage in agritourism activities (vineyard, cheese, olive oil, etc.).<sup>94</sup>

## Culinary or Gastronomic Tourism

Gastronomic tourism applies to tourists and visitors who plan their trips partially or totally in order to taste the cuisine of the place or to carry out activities related to gastronomy.<sup>95</sup>

### Experts Say...

"Culinary tourism, when organized responsibly, can open up a new window into the cultural and natural heritage of communities -- providing opportunities for new and unique local jobs, agricultural-biodiversity conservation initiatives and exciting visitor experiences. The key is to ensure that communities greatly benefit from providing these extraordinary experiences."

--Nikki Rose, *Founder, Crete's Culinary Sanctuaries*<sup>96</sup>



Demand continues to grow for experiential travel, and culinary tourism is no exception. Travelers take part in a bread baking interactive demonstration. Source: Nikki Rose, *Crete's Culinary Sanctuaries*

### Surveys and Statistics show...

According to a 2015 survey, an estimated 39 million U.S. leisure travelers choose a destination based on the availability of culinary activities, while another 35 million seek out culinary activities after a destination is decided upon.<sup>97</sup>

In a UNWTO survey, Affiliate Members listed the importance of food events (79% of respondents), gastronomic routes and cooking classes and workshops (62%), food fairs featuring local products (59%), and visits to markets and producers (53%).<sup>98</sup>

The percentage of U.S. leisure travelers who travel to learn about and enjoy unique dining experiences grew from 40% to 51% between 2006 and 2013. In 2012, it was estimated that tourism expenditures on food services in the U.S. topped \$201 billion, nearly a quarter of all travel income.<sup>99</sup>

Travelers are more concerned about food/drink waste and its packaging waste, and they have a continued interest in sourcing and buying local food and drink. The peer-to-peer dining experiences are also showing a stronger appearance on the culinary tourism scene, according to the World Food Travel Association's 2015 *Food Trekking Monitor*.<sup>100</sup>

A 2015 survey of professional chefs in the US revealed that 77% consider environmental sustainability as a "hot trend," 75% mentioned natural ingredients/minimally processed food, and 72% mentioned hyper-local sourcing (e.g. restaurant garden) as leading trends in restaurant menus.<sup>101</sup>

## Orange Tourism

"Orange tourism is a sustainable tourism that generates cultural, economic and social development through responsible touristic management of cultural heritage, artistic production, and cultural and creative industries."<sup>102</sup>

### Experts Say...

"Cultural tourism...has recently become one of the fastest growing tourism trends...This dynamic has been clearly reflected in a rise in cultural activities in recent decades and social longing for culture and heritage. This has been called the democratization of culture."

--UNWTO, *Global Report on Cultural Routes and Itineraries*<sup>103</sup>

### Surveys and Statistics show...

Tourism products related to cultural routes, cultural cities and cultural must-do's – those which are connected to popular culture, arts, the search for authenticity of destinations and local cultures, are probably the core elements forming the basis of the new scenario of worldwide cultural tourism.<sup>104</sup>

Within orange tourism, niches showing more development are those linked to heritage tourism, art tourism, festival tourism and, above all, cultural and creative industries which include craft tourism, film tourism, language tourism, literary tourism, culinary tourism and music and dance tourism, among others. Creative tourism deserves a special mention.<sup>105</sup>

As part of the cultural and creative sector, tourism agencies are promoting the orange economy as a means of setting their destination apart from others.<sup>106</sup>

Two general processes help to explain the growing interest in cultural tourism. Firstly, sensitivity to the environment and the need to protect it has increased. Secondly, an increase in interest in the past and, therefore, in the awareness of historic and artistic heritage has also taken place.<sup>107</sup>

If the so-called Orange Economy were a country it would be the world's fourth largest economy, it would rank ninth in exports of goods and services, and it would represent the world's fourth largest workforce, according to a 2013 study by the InterAmerican Development Bank.<sup>108</sup>

## Sharing Economy

The "sharing economy" (also known as shareconomy or collaborative consumption) describes "the rapid explosion in swapping, sharing, bartering, trading and renting being reinvented through the latest technologies and peer-to-peer market places in ways and on a scale never possible before."<sup>109</sup> In the tourism industry, the accommodation, transportation, food/beverage, and attraction sectors have all been transformed by the sharing economy.

### Experts Say...

"Uber, the world's largest taxi company, owns no vehicles. Facebook, the world's most popular media owner, creates no content. Alibaba, the most valuable retailer, has no inventory. And Airbnb, the world's largest accommodation provider, owns no real estate. Something interesting is happening."  
--Tom Goodwin, Senior Vice President of Strategy and Innovation, Havas<sup>110</sup>

### Surveys and Statistics show...

Forbes estimated the sharing economy at US\$3.5 billion in 2013 with a market growth rate of over 25% that year, but some analysts say it is a potential US\$110 billion market.<sup>111</sup>

A 2015 report by PricewaterhouseCoopers (PwC) estimates that Airbnb received 155 million guest stays in 2014, nearly 22% more than Hilton Worldwide.<sup>112</sup>

Surveys by Airbnb show 91% of its users want to 'live like locals,' and they stay 2.1 times longer than typical visitors of a destination, and spend 2.1 times more than normal. In addition, 53% of Airbnb hosts say that sharing their apartment has helped them to stay in their homes.<sup>113</sup>

A 2014 worldwide survey conducted by the Cleantech Group showed that in North America, Airbnb guests use 63% less energy than hotel guests – which is enough energy to power 19,000 homes for one year.<sup>114</sup>

The shared economy can be considered sustainable in some ways because it reduces the needs for energy and materials to produce new materials; reduces waste sent to landfills; avoids destruction of the earth's habitats; and increasingly satisfies personal and societal changing social needs and desires.<sup>115</sup>

## Wellness Tourism

"Travel associated with the goal of maintaining or enhancing one's personal well-being." It includes the pursuit of physical, mental, spiritual or environmental 'wellness' while traveling for either leisure or business.<sup>116</sup> This term should not be confused with medical tourism.

### Experts Say...

"In my 13 years researching this annual report [*Top 10 Global Spa & Wellness Trends Forecast*], what's most exciting to me is watching trends that initially seem surprising, ultimately have long-term staying power. And in all those years of crystal-ball-gazing, I've never seen **wellness travel** so powerfully dominate the forecast like it does in 2016."  
--Susie Ellis, President, Spafiinder Wellness, Inc.<sup>117</sup>

### Surveys and Statistics show...

Wellness tourism is already a \$439-billion market, and is set to grow to \$678.5 billion by 2017. It is directly responsible for 11.7 million global jobs, which deliver \$1.3 trillion in global economic impact, and wellness tourists spend, on average, 130% more than the average global tourist.<sup>118</sup>



An emerging trend, guests combine wellness and adventure activities for the ultimate rejuvenating experience.  
Source: Bodhi Surf School

71% of travel agents in North America and Europe say consumers are more aware of wellness travel and 83% say consumers will pay a premium for wellness.<sup>119</sup>

Top trends in the luxury wellness travel:

- Travelers want to be immersed in more local, indigenous cultural experiences and destinations
- Travelers increasingly seek destinations with healthy body/mind offerings
- Travelers increasingly seek exotic, off-the-beaten path destinations<sup>120</sup>

Costa Rica and Thailand were the clear standouts for 2015 wellness-seeking traveler.<sup>121</sup>

While wellness travel initially focused around "stress-reducing spa, yoga, and meditation, that's now getting paired with more high-adrenaline travel categories", such as surfing. The combination of high-adrenaline and relaxing wellness experiences has a "profoundly relaxing mind-body effect."<sup>122</sup>

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For consistency, this report uses US spellings and US \$ throughout unless otherwise noted.

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



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