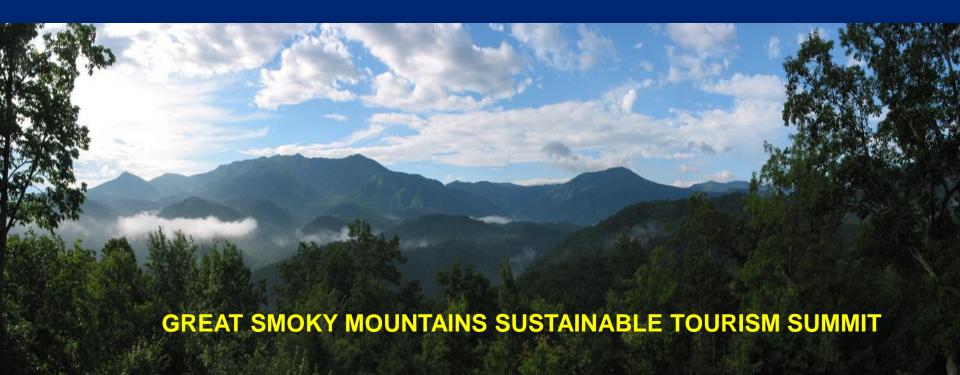
## Why Sustainable Tourism Makes Both Dollars & Sense

Suzanne D. Cook, Ph.D. Travel Industry Association



Sustainability: "Meeting the needs of the present without compromising the ability of future generations to meet their own needs."



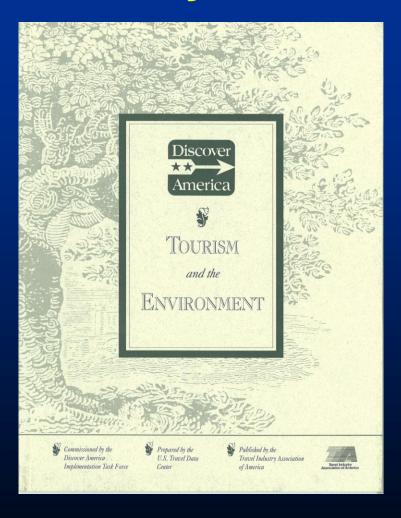
### A Generation of Earth Days



www.earthday.net



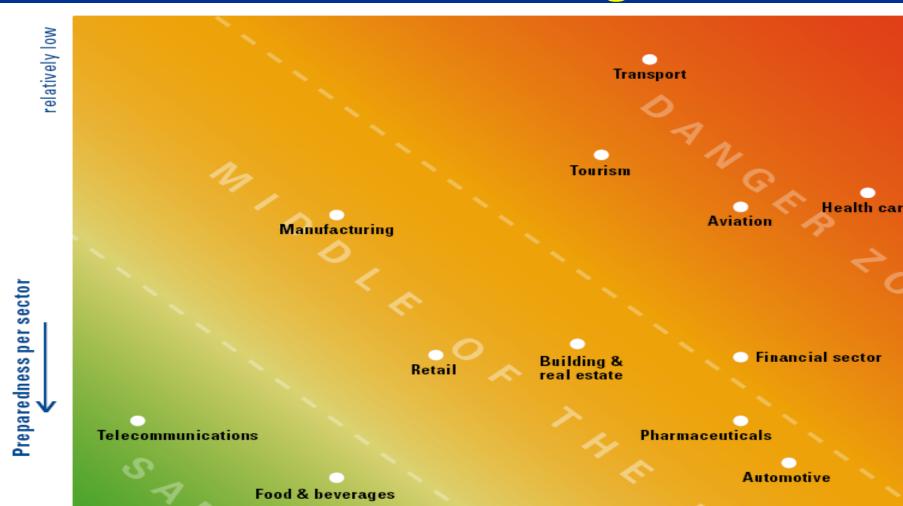
# Tourism and the Environment Published by TIA in 1992







# **Aviation and Tourism in the Danger Zone of Climate Change Risk**





Source: KPMG

# Why the Sudden Urge to "Go Green" Now?

- The debate in Congress over the "science" of climate change is over
- Congress wants to move legislation to cap greenhouse emissions ASAP
- The "travel" experience is under attack (Is travel immoral or an "eco-crime"?)
- We can either be "at the table or be on the menu" (Michael Goo, NRDC)

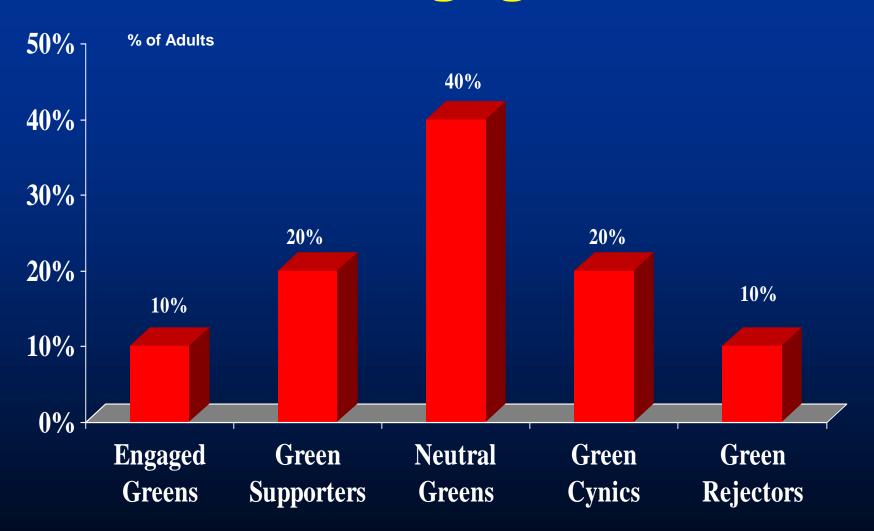


### **The Consumer**





### Green Engagement





Source: TGI and The CarbonNeutral Company



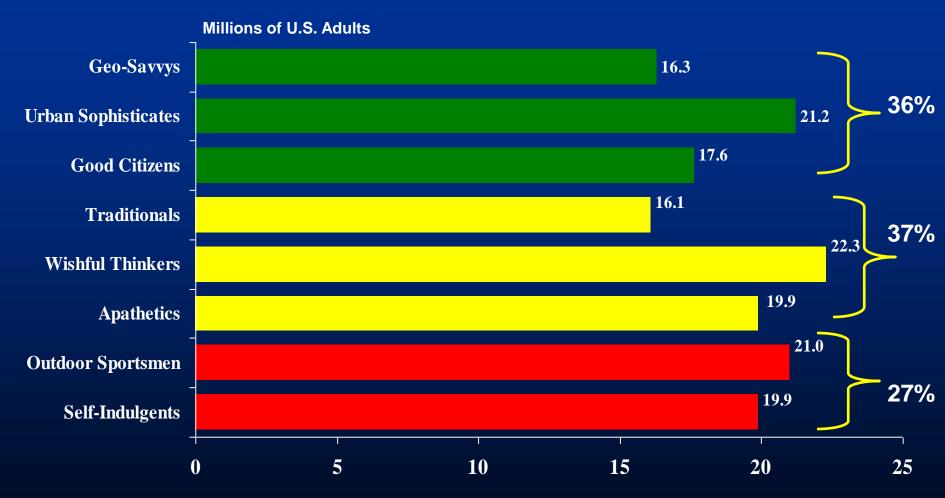
### **Geotourism:**The New Way to Travel

Tourism that sustains or enhances the geographical character of the place being visited – its environment, culture, heritage and the well-being of its residents



Source: National Geographic Traveler

## One-Third of Americans Have Positive Geotourism Profiles





### 2007 research report

8495

A Publication of the Travel Industry Association

#### The Ideal American Vacation Trip







### One-Third of American Travelers Report Sustainability-Relevant Motivations







#### **Experientials**

Enthusiastic travelers interested in exploration and discovery. 22.4 million, 18% of leisure travel market

#### **Quintessential Travelers**

Want to do it all. 8.6 million, 7% of leisure travel market

#### **Trail Blazers**

Outdoor enthusiasts; interest in experiences and adventure.
12.2 million, 10% of leisure travel market



Perspectives on the Travel Intentions of Americans





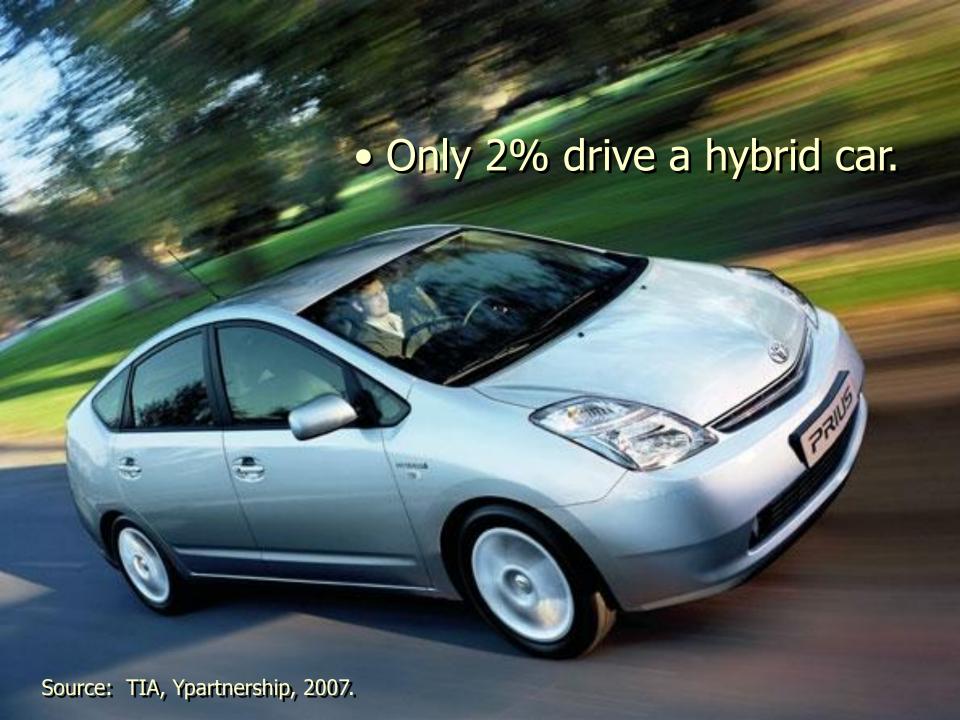




 85% turn the lights off when leaving a room.



Source: TIA, Ypartnership, 2007.



### Feeling Green

66% - Try to be energy efficient at home

60% - Recycle trash

60% - Turn off water when brushing teeth

53% - Keep showers short

25% - Plant trees

22% - Buy environmentally safe products

20% - Walk/bike instead of drive when possible

9% - Car pool

Source: TIA, Ypartnership, 2007.



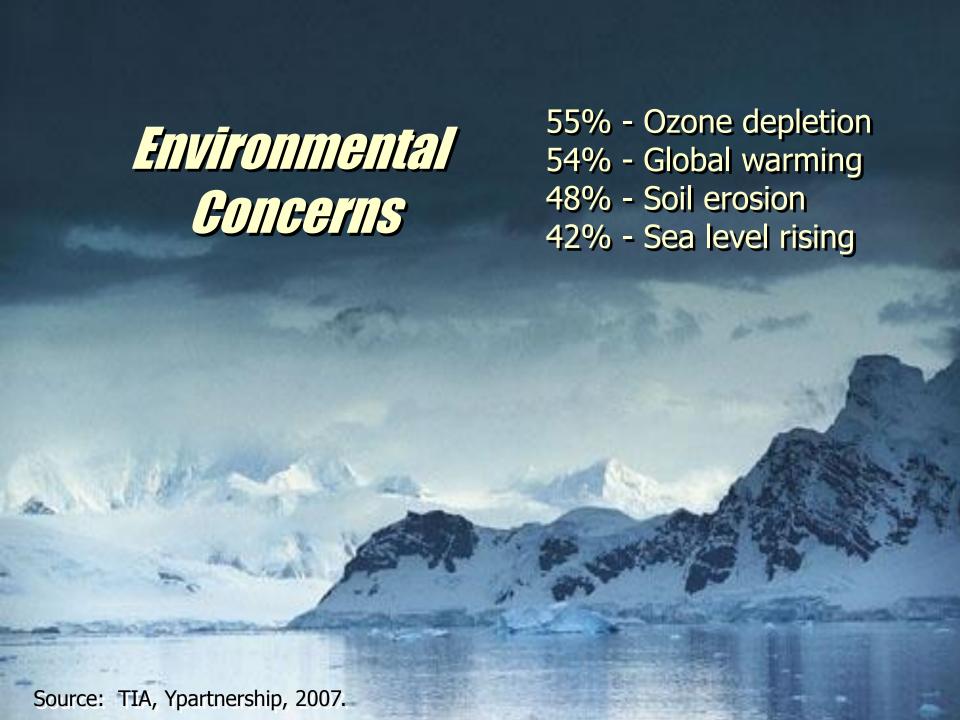
70% - Air pollution

70% - Water pollution

59% - Waste management

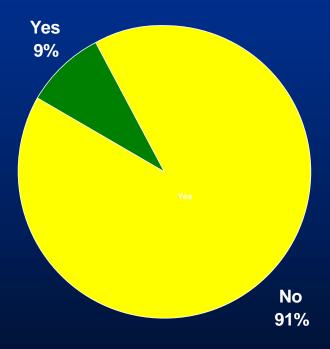
56% - Deforestation



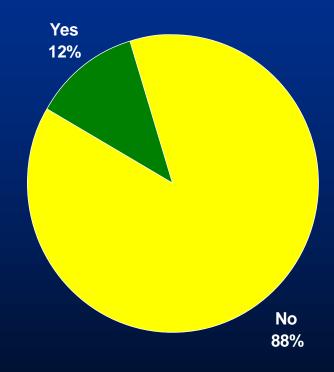


# Minority are Familiar with Concepts of Green Tourism and Carbon Footprint

#### **Familiar with Green Tourism**

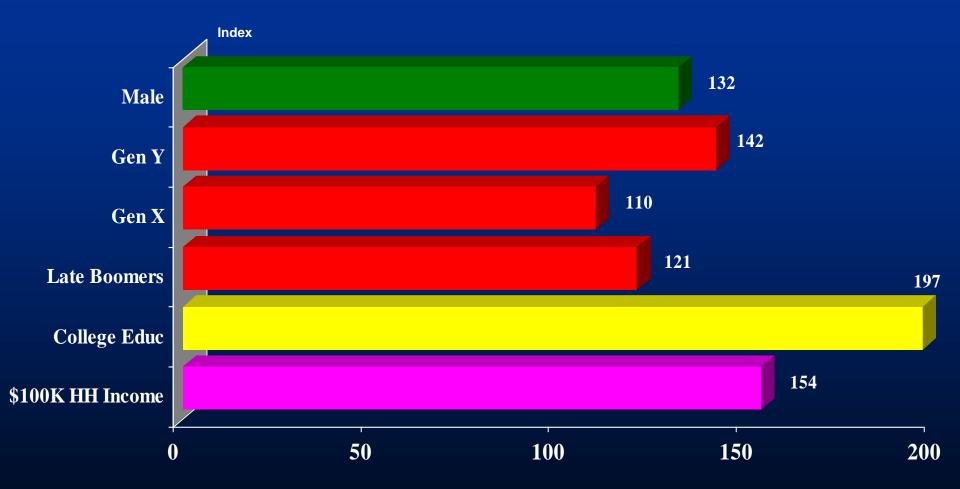


#### **Familiar with Carbon Footprint**





## Those Familiar with Concept of Carbon Footprint Most Likely to Be:

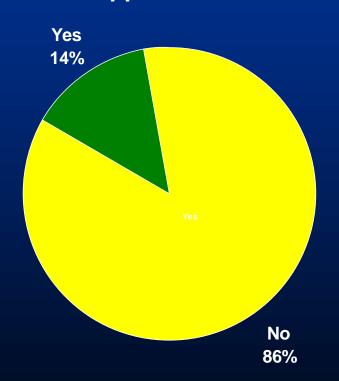


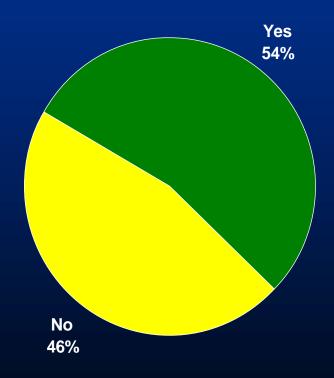


# Consumer Perceptions about Travel Industry's Green Efforts

Green Efforts Major Influence on Supplier Selection

**Preference for Eco-Friendly Companies** 

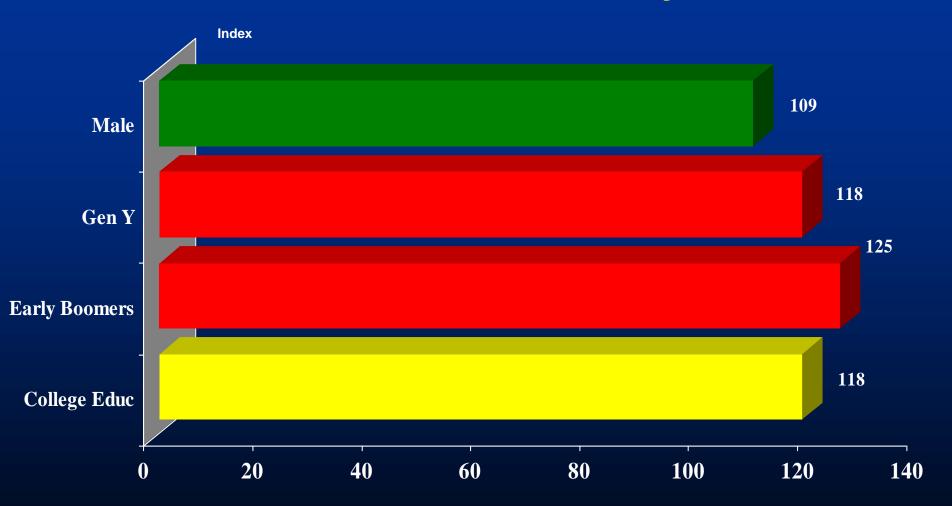








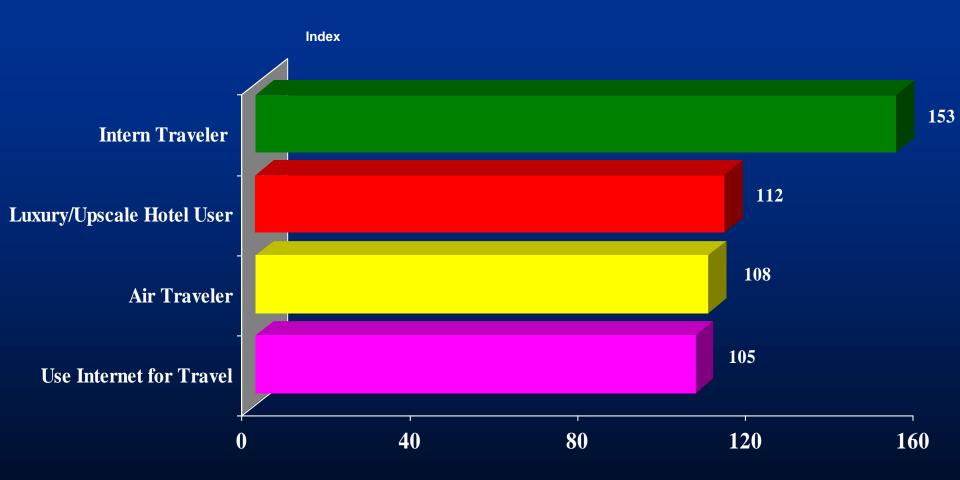
### Those Influenced by Travel Industry's Green Efforts Most Likely to Be:





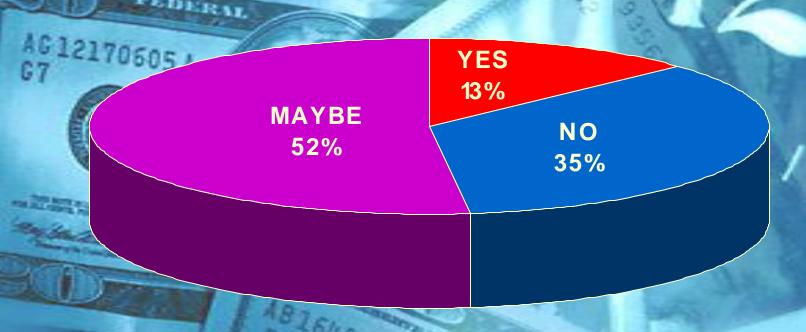
Source: TIA and YPartnership's *TravelHorizons* ™

### Travel Characteristics of Those Influenced by Travel Industry's Green Efforts





### Milling to Pay Higher Pares/Hales To Suppliers Min Demonstrate Emilonnessed Concern



76% say <9% more.

Source: TIA, Ypartnership, 2007.

### Don't Fake It

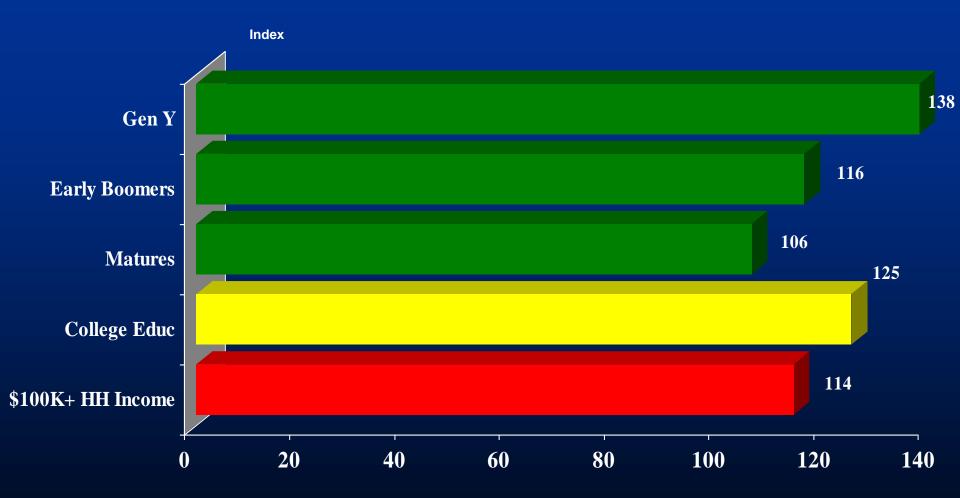
 There are lies, damn lies and then there's "green-washing"

 Recycling the office paper does not an eco-friendly destination or company make!





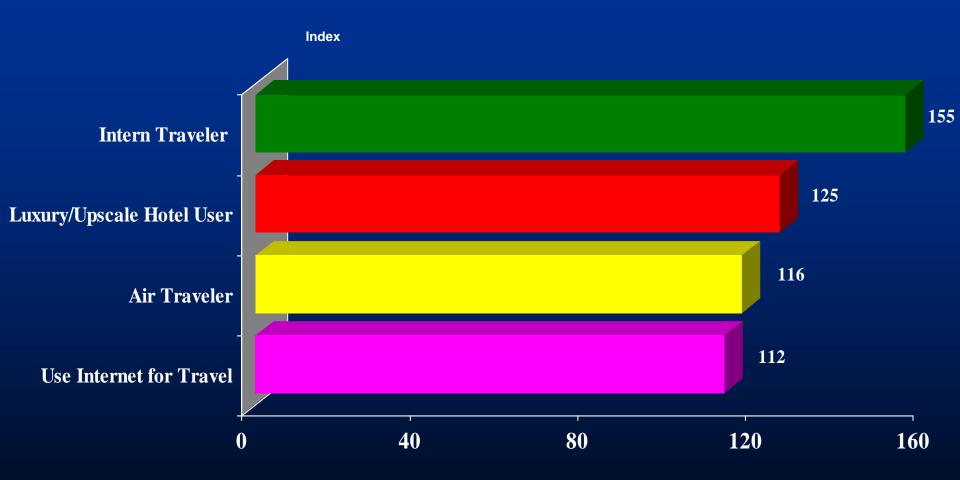
### Those Most Likely to Pay More for Green Travel





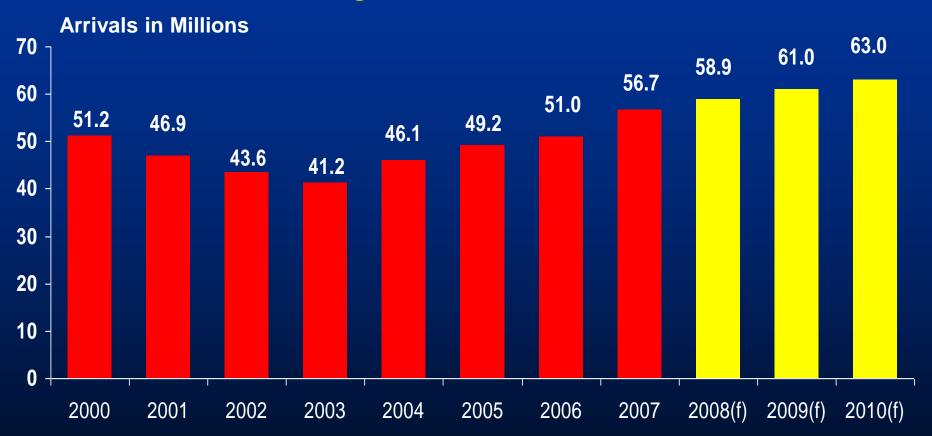
Source: TIA and YPartnership's *TravelHorizons* ™

## Travel Characteristics of Those Most Likely to Pay More





# International Visitors to the U.S. And Projections (2000-2010f)



Sources:

U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; Secretaria de Turismo (Mexico); Statistics Canada



### Conclusions

- Core market for sustainable travel
   ~10%
- Another 20% have positive attitudes
- 40% now neutral but could be attracted
- Affluent, educated and higher-end travelers are the most sustainabilityoriented



### Conclusions

- General lack of awareness and knowledge
- Travelers are becoming more sustainability-conscious and are beginning to make decisions based on sustainability criteria
- Make it personal and relevant, stress functional benefits, as well as sustainability
- Trust, honesty and relationships matter

## The Time to Learn, Collaborate and Act is Now

- Increase financial competitiveness becoming sustainable can save you money
- Can also help you gain market share among sustainability-minded travelers
- Enhance the travel experience
- Prepare for legislation that is sure to come
- Tourism has potential of increasing public awareness and appreciation of environmental and sustainability issues

