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## Sustainable Tourism: Travel Like You Mean It!

In light of the impacts of world travel, sustainable tourism is becoming an important concept for governments, for the tourism industry, and for travellers. A recent study finds that, while the concept is not well understood by most Canadians, it does generate a positive reaction when explained and may have an enduring impact. **Helena Haley**

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**T**his is a pivotal point in time, when consumers are coming to embrace environmental and community-related initiatives and see them in a global context. And so there is a decided need for destination marketers to better understand the opportunity to respond to emerging consumer interest in more ethical and sustainable forms of travel. With this need in mind, TNS Canadian Facts recently conducted a study of Canadian attitudes to sustainable tourism.

### BACKGROUND & OBJECTIVES

Tourism is one of the key industries for many countries, according to the United Nations World Tourism Organization.<sup>1</sup> This one industry generated \$730 billion last year alone, \$70.6 billion of it in Canada.<sup>2</sup> And while annual industry

growth has been impressive, it may have been at the expense of destination integrity and sustainability. It is no surprise, then, that over the last decade the sustainability of tourism has become an area of concern for governments, non-profit organizations, and tourism businesses worldwide. However, for significant investments in sustainability initiatives to occur, travellers' perspectives on this issue must be considered. Do consumers understand the concept? Do they appreciate its significance? Are they willing to take action?

Our study measured levels of awareness and understanding of the concept of sustainability among online Canadian travellers. It had three main objectives: (1) to determine the level and nature of Canadian travellers' understanding of the

sustainability concept, both implicitly and explicitly; (2) to measure the depth of their commitment to sustainability; and (3) to reveal whether there is support among Canadian travellers for sustainable business practices in tourism.

#### METHODOLOGY

To obtain the trend information, we conducted two nationally representative Internet surveys. The first survey, of 1,079 online Canadian travellers (those who have taken an overnight pleasure or vacation trip in the past two years or claim an intention to take such a trip in the next twelve months), all 18 years of age and older, was conducted July 18–22, 2007. The second survey was of 1,180 online Canadian travellers 18 years and older, conducted March 12–17, 2008. Respondents were randomly selected from the TNS Canadian Facts Internet access panel (comprising 100,000 Canadian adults) and were asked to visit our website to participate in the study. Completions were weighted by key demographics – region, age, gender, income and education – to represent the Canadian online population.

As part of this analysis, we undertook a segmentation exercise to isolate forward-looking shapers of future travel trends using the FutureView™ model. This model is specifically designed to identify people who will shape the future of consumer demand and interest. The resulting analysis established the degree to which interest in sustainable travel is enduring and likely to become a mainstream motivator over the longer term.

#### FINDINGS

Nearly two-thirds of Canadian travellers say they are concerned about global warming, the loss of natural habitats and ecosystems, and the use of child labour in developing countries. But the question remains: Does this mean that Canadian travellers are willing to change their travel behaviours on the basis of these concerns?

Currently, the concept of sustainable tourism is not well understood among consumers. Only 8 per cent of Canadian travellers claim to be very or fairly familiar with it (with no evident change in that level between 2007 and 2008). This figure is low by any standard. Other tourism concepts generate much higher levels of claimed familiarity (25% in the case of adventure tourism, for instance).

However, the concept of sustainable tourism does generate a positive reaction among consumers when they are given a definition – “tourism that respects the local environment, culture, people, and economy.” More than 8 in 10 Canadian travellers (83% in 2007 and 86% in 2008) agree that sustainable tourism practices would have a positive effect on the world’s future. In other words, while appreciation of the concept is currently underdeveloped, and while there is likely some yea-saying associated with environmental issues, it is quite possible that the issue of sustainability will have a significant impact on future decision-making, behaviour, and marketing plans in the tourism sector.

Many Canadian travellers express a willingness to take personal action. One-third say that they would switch from a preferred holiday destination to one that supported sustainable tourism, while 4 in 10 would try to find and use a travel agency that adheres to environmental guidelines. And over one-quarter (28% in 2007 and 27% in 2008) say they would pay a premium for an ethical and sustainable holiday.

These numbers are slightly higher than what TNS reported for Europe and the U.S.A. in the Green Travel survey (November 2007). An impressive 32% of Italians claimed a willingness to switch to more ethical, greener vacations, in contrast to only 16% of Americans. In

Britain, 7% of the travellers have actually gone so far as to make a payment towards minimizing the impact of their travelling; in Spain, 12% have done so. In light of these figures, it is quite likely that many Canadians will be receptive to appeals that minimize the environmental impacts of travel.

As illustrated by the TNS study, Canadian travellers believe that multiple stakeholders share the responsibility for activating demand for sustainable tourism. Three-quarters believe that both the mass media and businesses which market and sell tourism should ensure that information and sustainable choices are made available to travellers. Almost two-thirds believe that government has an important role to play in educating its citizens about the necessity of adopting sustainable tourism practices. And, finally, two-thirds of travellers feel that it is ultimately the travelling public that occupies the locus of control and that travellers themselves must take responsibility for planning travel with sustainability in mind.

One of the interviewed travellers had this to say. “Sustainable tourism is the optimal use of natural and cultural resources for national development on an equitable and self-sustaining basis to provide a unique visitor experience and an improved quality of life through partnership among government, the private sector, and communities.”

It is clear that consumers do not see themselves as standing alone in an effort to push the sustainability endeavour forward, but rather see a need for various stakeholders to work cooperatively in this effort. Undoubtedly, engaging consumers and making environmentally friendly choices readily available to the public will raise the profile of the sustainability concept.

Finally, the reactions of FutureShapers™ (the trendsetters and the most important group of consumers with respect to future market potential) suggest that sustainable tourism will grow as an enduring concern. First, the concept of sustainable tourism appeals very strongly to trendsetters within the leisure travel category. These travellers are, by definition, most likely to initiate a given trend and pull this behaviour into the mainstream over the longer term. Second, FutureShapers™ also exhibit accelerated growth in understanding and appreciation of the sustainable tourism concept.

#### IMPLICATIONS

Issues fostering the need for a strategy of sustainable tourism are of widespread concern to Canadians. However, the majority do not immediately link these

concerns. Confusion and skepticism about ameliorative actions such as carbon offsetting have grown, in no small part as an outcome of the fragmented and deregulated industry practices enforcing it. We also have to look at the Canadian government, which continues to take a passive role in championing environmental issues and provides limited regulatory enforcement. As a consequence of all these factors, there is no perceived urgency to the good intentions expressed by Canadian consumers and limited inclination to incur immediate personal costs or inconvenience in order to participate in change.

Demand for information related to sustainable tourism concepts is growing. However, Canadian travellers may view their future plans in a more realistic

However, because the concept of sustainable tourism is poorly appreciated at the present time, it has borne little fruit as a holistic expression of related concerns and solutions. As a consequence of all this, the notion of sustainable tourism, at present, achieves fairly low priority among the decision-making criteria used by Canadian travellers. Yet, the application of FutureView™ analysis suggests that the issue is likely to resonate more strongly in the future and emerge as a growing concern in society.

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issues to tourism-related causes or solutions, nor do they necessarily appreciate the direct impact of tourism on the deterioration of important natural and historic sites worldwide.

Further, we do not observe a statistically significant increase in travellers' concern for sustainable tourism initiatives since July of 2007. Why? Let us entertain just a few possibilities.

The year 2007 has been noted as "the year when everyone jumped on the environment bandwagon,"<sup>3, cf. 4</sup> Al Gore's *An Inconvenient Truth: The Planetary Emergency of Global Warming and What We Can Do About It* was at its peak popularity. By early 2008, people were likely suffering, to some degree, from information overload and "eco-fatigue"<sup>4</sup> and were beginning to turn their attention to other

light when they realize what sustainable travelling really entails. The perception of personal sacrifice may also lead to a reduced level of demand for sustainable tourism products as consumers gain familiarity with the concept.

At the same time, Canadian travellers are well placed to take control of the issue. Many plan to travel in the near future, and most assume responsibility for the nature of their trips. Many Canadian travellers plan their vacations independently and are willing to make lifestyle choices and changes to aid worthy causes, particularly when they are explained well. The majority of Canadian travellers expressing concern with any of the current world issues claim to have altered their purchase habits and/or lifestyle choices so that, at a minimum, they are not contributing to the problem.

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