



2nd Annual Green Traveler Study 2010-11





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The largest, most comprehensive green consumer research collaboration of its kind.



The CMI Green Traveler Study 2010-11

Consumer preferences and behaviors have demonstrated to the tourism and hospitality industries that sustainability presents a range of new opportunities, as public awareness and demand rises. The fundamental question today is not *whether* sustainability will influence consumer choice and your bottom line — but *how*.

The 2nd Annual **CMI Green Traveler Study** approaches answering this question based on consumer sampling and 18+ years of tourism observation, analysis and case study.

Travel and hospitality consumers are quickly becoming informed in the issues connected with “green travel,” and are demanding greater social and environmental engagement from destinations and suppliers. With this shift in consumer consciousness, consumption patterns are trending toward more responsible, earth-friendly alternatives — and tourism and hospitality industry leaders are *genuinely* embracing sustainability to establish competitive advantage, enhance brand value and drive sales. This is moving market share for those taking initial steps.

In 2009, tourism research expert Community Marketing, Inc. launched the pioneering **CMI Green Traveler Study**, designed to provide industry leaders with information and insights to understand, reposition and leverage opportunities in the emerging sustainable travel marketplace.

This follow-up study updates the data, and identifies and analyzes trends.

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CMIGreen 2nd Annual Green Traveler Survey Report

Introduction

In the 1st Annual CMIGreen Traveler Survey (2009) we asked, *what is green travel?* The absence of consistent environmental standards has left it to suppliers to define sustainable practices. What we have found in our 2nd Annual CMIGreen Traveler Survey, however, is that it is ultimately up to the consumer to decide what green travel is. Hotels, restaurants, airlines, cruise lines and rental car companies are all implementing new products, services, systems and brands that they think will satisfy the green (aka sustainable, socially responsible) traveler.

In the year between our first and second survey, we can see that some of those initiatives have borne fruit, while others are dying on the vine. But this year's respondents strongly suggest that it is easier for individual travelers to seek out more environmentally friendly products and services than it is for travel suppliers and large corporations to implement them.

Some travel companies and industries are doing a commendable job at greening their operations, of course; green travelers recognize that, and award them their business. And since environmental and resource realities virtually guarantee that green travel is anything but a passing fad, every segment of the travel industry is moving towards a goal of more sustainable products and services — if slowly.

At this early, transitional stage, the variety of “green” travel brands, claims, messages and environmental tourism certifications can be confusing. Green travelers, too, come in every shade, from business travelers looking for airport hotels that let them recycle to *voluntourists* eager to help scientists in the rainforest.

Caveat emptor is the saying, however — buyer beware. Whatever their definition of sustainable travel, green travelers seem to understand that they must be as informed and proactive as the companies they travel with — if not more so.



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Who is the Green Traveler?

Research experts at CMIGreen have conducted their second annual comprehensive Green Traveler Study. The study pulls together detailed information and insights about the environmentally-aware travelers who make up the emerging green travel market, providing sustainable travel leaders with the knowledge they need to anticipate challenges and convert opportunities as the industry continues to evolve.

In 2010, the Green Traveler Study asked over 950 “eco-conscious” travelers

- How do they travel, and how much?
- What does “sustainable” or “green” travel mean to them?
- How environmentally conscious are their purchasing decisions when not traveling?
- What drives their interest in green travel options and destinations?
- Will they pay a premium for sustainable choices?
- Is there a gap between their intentions and their behavior?
- What do they expect from green travel brands? How do they view green branding and messaging? What gives them trust — or makes them skeptical?
- How deep is their commitment to green travel, and how far will they take it?

We analyzed their responses in light of changes from our 2009 survey and report to shed light on the apparent trends: how green travel “niche market” preferences might be changing.

By leveraging these insights into *who their customers are and what they want*, brands that can communicate a clear, green identity and back it up with solid environmental practices will emerge as winners in the increasingly important sustainable travel market.

Methodology

The CMIGreen Traveler Report is the first comprehensive study on green travelers. 2,768 adults from across the USA were surveyed on sustainable travel by Community Marketing, Inc. from July 15 through August 31, 2010. This report focuses the 951 respondents who consider themselves to be “extremely” or “very” eco-conscious and who took at least one overnight vacation in the past year. The study marks and measures key trends in sustainable, responsible, eco and green travel: *considering greener travelers as a viable and increasingly important niche market*. The survey panel is not intended to reflect national census data or distribution.

This year’s panel of 2,768 consists of subscribers derived from last year’s survey (which was derived through partnerships with more than 20 tourism, hospitality and sustainability companies and organizations), supplemented with new partner organization members, as well as panelist contributions recruited from Travelocity, RCI, Gap Adventures, and others.

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KEY FINDINGS

We conducted our first CMIGreen Traveler Survey in 2009 to help establish a baseline from which we could measure the growth of this market segment, and to track trends. While the past year has not brought any great clarity on what terms like green and sustainable mean to travel providers, this year respondents were more discriminating—and more skeptical.

Respondents relied more on their peers to get the story rather than worrying about the validity of claims by suppliers. Web 2.0 and social media were more important sources of information this year, mirroring larger online trends. Respondents this year were both more environmentally aware and more proactive about it—in terms of more green purchases, sustainable lifestyle practices and travel. This year's group traveled 5-8% more than last year's.

Updated findings for 2010: This year's report builds on and updates our 2009 study. The entire report has been edited and revised based on the new data. *When differences were substantive year to year, analysis of new data in individual charts is indicated by red text.*

Key Finding #1: Eco-Travelers Become Greener

Overall, respondents in this year's survey were more committed to sustainability both at home and on the road. This year's sample of travelers was more significantly more eco-conscious, shopping locally, recycling more at home and at work, buying recycled products, and avoiding unnecessary purchases. More respondents who took more active steps towards a sustainable lifestyle increased in this year's survey over last year's—composting, going vegetarian, bicycling or taking public transportation to work. Their overall behavior and spending was 5-17% more environmentally friendly than our 2009 respondents.

As travelers, 5% more of our respondents acted on their environmental concerns while traveling. Specific green travel practices were up across the board over the previous survey—85% say they had turned off the lights when they left the room, and over 75% say they had recycled and used their towels and sheets more than once. More significant changes in green behavior were seen more substantive, proactive environmental measures: there was a 7.5% increase in the number who said they “researched and booked greener accommodations” and almost 4% more offset the impact of their travel. When in a new location they ate local cuisine and traveled by train and other local transportation (+4-5%). There was a similar increase of 5% in the number of travelers whose environmental concerns impacted their discretionary travel style. There was a more than 8% increase in the number of travelers saying they would most likely go on a greener vacation within the next year.

Insight: The responses show that that eco-travel is not just a fad. While there are many degrees of environmental commitment—and price, convenience and location continue to be primary criteria in travel—green travelers took even more proactive measures, on the whole, in 2010. Reaching the average “green” traveler means making sustainable travel more readily available. Green travel brands must do a better job of marketing to convenience-oriented, price-sensitive travelers, matching products, services and messaging to their customers’ lifestyles and business travel requirements, *without levying added costs to do so.*

Key Finding #2:

Low Tolerance for High Premiums – The Green Price Point

62% of respondents said that they did not pay extra to stay at a “greener hotel” in the last 12 months. And 87.3% of travelers paid between 0 and 5%, which represents more than a 13% increase over 2009. Is green getting cheaper? Are green practices something customers don’t know they’re paying for? Are economic conditions keeping travelers from acting on their green intentions? Green is still not something customers will actually pay extra for today; they won’t pay a “green tax.”

One thing is certain — price remains a central concern among travelers. Price was ranked as the #1 criterion for choosing a hotel by more travelers than any other factor, including the hotel’s environmental programs.

Insight: Make green concrete. For most people, environmental sustainability is still a relatively abstract concept — especially when compared to practical issues like price and convenience. LEED certification, carbon offsets and sustainable materials do not have the visceral appeal of an ocean view or an Olympic-sized pool. Flipping those product attributes into consumer benefits will let travel providers create visceral product and brand appeal, driving sales and justifying price premiums. Instead of talking about LEED certification, a green hotel operator can mention the healthy, comfortable and luxurious benefits the hotel offers the customer. Pure air, natural, non-toxic carpeting and healthy, organic linens are creature comforts that could compel customers would to pay a premium for sustainability.

*That said, numerous case studies across all tourism and hospitality segments show enormous cost-saving benefits to green initiatives, and CMIGreen has identified **operations** as the place to find the ROI in green, not extra charges to consumers.*

Key Finding #3:

Travel Industry’s Sustainability Practices Improved, Still “Need Work”

How green is travel in 2010? Slightly better than 2009, according to our respondents. This well-traveled and eco-conscious group gave slightly better grades to almost every hospitality segment (except that all-inclusive resorts and tour operators received more “terrible” and fewer

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airline and conventions/corporate events segments a “needs work” rating. Car rental companies, cruise lines, airlines and meetings/conventions still received a substantial number of “terrible” votes. Hotels and trains fared best — while most respondents still said they need work, they were the only industry segments receiving “fair” votes over 45%.

Too many travel companies are doing little or nothing to minimize their environmental impact; other businesses’ highly-touted recycling and conservation efforts were often viewed as superficial “greenwashing.”

Insight: Now that the first green blush of eco-friendly marketing has faded, the travel industry’s sustainability efforts must be broader and deeper to earn the trust — and the business — of savvy, green travelers. Emerging environmental standards like GSTC will certify thorough, systemic sustainability, not just a spot approach. And to compete for business travelers, winning brands will have to offer products and services that help other businesses meet their strategic goals and fulfill corporate social responsibility missions at a competitive price point.

Key Finding #4:

The Green Leadership Vacuum: Room for Differentiation

Between 2009 and 2010, the only brand that managed to maintain a clear, green identity was Costa Rica, whose national parks and biological diversity have made it a perennial favorite with eco-travelers. Most travel brands failed to make a “green impression” on eco-travelers over 4%. More than a few actually slipped in their overall green brand recognition. The cruise line that received the most votes from respondents was “none.”

While many of the brands that received few votes (i.e. almost all of them) trumpeted strong environmental programs, experienced green travelers tend to be “green skeptics” when brands fail to “walk the walk,” backing up clear green messaging with meaningful sustainability practices. Two brands that did emerge as clear green leaders in their category were Hertz and Enterprise rental cars. Both companies have made substantial additions of hybrids and even electric vehicles to their fleets and have done extensive work to make many of their global facilities more environmental sustainable. The investment seems to be paying off among respondents, who said Hertz and Enterprise had done twice or three times as good a job and projecting an environmentally friendly image as their competitors.

Like Costa Rica, Hertz and Enterprise show that backing up your claims with real investment in sustainability can provide differentiation. In most segments of the travel industry, however, a vacuum in green leadership remains. Very few brands have succeeded in establishing top-of-mind, green travel awareness among the broad range of these travel consumers.

Insight: With the green travel segment still emerging, this is a good time for travel and hospitality providers to grab market share. Consistent, sustained sustainability programs with “teeth,” and targeted, accurate, compelling and benefit-oriented messaging will enable leading

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firms to differentiate themselves from competitors and gain “mind share” among green travel consumers.

Key Finding #5: Green Skepticism: The Need for Certification

This year’s respondents presented us with contradictory findings. While on the one hand more trusting of the claims made by green travel suppliers — perhaps armed with peer verification gleaned from peer review travel sites — they were also savvy and possibly jaded when it came to green advertising. Words like “green” and “bio” don’t mean much to them, in fact, compared to concrete programs like local sourcing and social responsibility. Consumer skepticism towards “greenwashing,” combined with disagreement over what green travel means, have created a need to establish standards for environmentally-friendly, sustainable travel —and trusted certification.

Over 40% of respondents looked for 3rd party certification to verify that a travel supplier is truly “environmentally friendly.” And 91.6% of respondents said that a hotel’s environmental rating is an influence.

Yet there are presently over 350 “green” travel or hospitality certifications — and 97% of respondents could not name any that they were aware of. Our responses indicate that at this stage in the greening of the travel business, travelers are relying on verification from 3rd party sites and social media to verify certifications before trusting them.

Some industry leaders are questioning whether the profusion of green certification systems is good for green travel.

“With all the different systems, it’s actually harder to find an environmentally friendly hotel,” said one builder, “because without a set standard one could end up at a hotel that’s rated green by more superficial standards (points for bamboo sheets or recycled menus, for instance) instead of a hotel that features sustainable systems such as a gray water system or geothermal heating... Until a universal system is recognized, be careful when choosing a green hotel. It could easily be less environmentally friendly than you think.”¹

Insight: The green travel industry, analysts and green travel advocacy groups must come together to

- establish workable standards for green travel throughout the industry
- award certification for meeting those standards — an industry “seal of approval” on par with UL or ADA
- proactively brand that certification to gain wide recognition and trust among travelers

Hotels, tour operators, airlines and restaurants have different sustainability criteria; each segment of the travel industry may have to develop its own certification. Most travelers and travel

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industry professionals seem to understand that developing a universal certification or certifications as universally recognized as Michelin, Zagat, AAA or Energy Star will take time. However, operating under an overarching, recognized certification brand will help consumers travel more sustainably, give teeth to corporate social responsibility initiatives and drive new business for leading travel brands.

1) “Green rating systems: When is enough enough?” Wisconsin Builder, January 21, 2010

Key Finding #6:

Business Travel: a step backwards — for now.

Business travel actually increased this year among respondents, outperforming the larger economy, and a new question found that most respondents worked for companies that did not have an environmentally friendly business travel policy. There was also a 15% drop in the number of employers who recommended green hotels. While the poor performance of the overall economy is likely to be holding back green business travel initiatives, industry reports do show that more leading firms like Oracle and KPMG are in fact instituting green travel policies.

What businesses should pay attention to is the 80% majority of respondents who said that *they would support business travel policies by their employers* — as well as the 90% who indicated that green business travel policies would very likely result in their making personal travel more sustainable, as well.

Convenience may what’s missing in the lagging transition to sustainable business travel. In a new question this year, a substantial number of respondents indicated that if their companies’ business travel reservation systems made it possible to choose environmentally-friendly options, they would be much more likely to do so. Travel procurement solutions provider GetThere is the first to fill the gap with GetThere Green, a new product that integrates green choices and messaging into business travel procurement systems.

Despite the uptick in business travel this year, however, improving video conferencing technology is going to continue to make managers question the necessity of much of today’s business travel — particularly as the cost of video conferencing drops.

Insight: Given the results of our study, however, it is taking time for sustainable business philosophy to translate into dollars spent on green hotels and carbon offsets for jet travel. As the economy improves and becomes increasingly green, will business travel become greener? Or will less expensive and more environmentally friendly alternatives like videoconferencing continue to take the place of business travel?

Key Finding #7:

Meeting and event planning: a promising sector stalls

Last year's results showed that most companies in the event-planning industry were working to incorporate "green meeting" options into events. This year, however, there was a nearly 20% drop in sustainable event planning (e.g. local venues with teleconferencing options) from 2009, and 6% rise in the number of companies that did not plan any Green Meeting options.

While those numbers could reflect the number of respondents who did not know if their company had a green meetings policy, sustainable business is, on the whole, still a work in progress. The majority of respondents among event planners said that suppliers were only able to meet their sustainability requests some of the time, while a smaller percentage said that suppliers were consistently able to meet requests, and more suppliers could not help them with green events.

Yet as more of society and business "goes green," so do the expectations of event attendees. More than 86% of respondents this year said that it was at least somewhat important to them that organizers of business events utilize environmentally friendly practices. It seems as if market demand over the long term will keep greening the meeting and event business — especially once the economy recovers.

Insight: Respondents had the perception that green event practices were too expensive, and that suppliers would not be able to help meet their sustainable goals. However, sustainable measures save resources *and* save money, according to leading green meeting planners. And as one specialist said, "It's definitely a planner's market right now...most suppliers are being very supportive of all endeavors — including green."

Most respondents said again this year that more information would help motivate them to implement sustainable event strategies — a clear message to green meetings advocates and suppliers that better marketing and communications are needed. A new question also indicated that financial incentives (to planners) for green events would accelerate the sustainability of the event and convention industry.

Key Finding #8:

Disaster = Opportunity for Voluntourism

In the past two years, *voluntourism* has emerged as the "hot" new form of travel. More than a few media outlets have identified the combination of volunteering with travel as one the fastest growing segments in the travel industry. While there is more interest and expectation than participation, a spate of disasters — whether natural, like the Haiti earthquake, or industrial, like the Gulf oil spill — are bringing people to volunteer in regions previously only thought of as tourist destinations, such as the Caribbean islands.

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Insight: Voluntourism presents great potential to businesses across the travel industry. Florida presents a textbook example of how even in vacation destinations visited by disaster, hospitality for tourists can be converted to a resource for disaster relief. Beyond voluntourism organizers and aggregators, tour operators, hotels, resorts, airlines and even cruise lines can take advantage of this fast-emerging trend to engage new travelers, generate new revenue streams, and expand their own corporate social responsibility missions.

Key Finding #9: Travelers Influenced by Each Other — Not Advertising

This year's survey again demonstrated unequivocally that peer influence has the greatest influence on eco-conscious consumers when planning a vacation. Peer review travel sites continued to be a dominant influence on travel decisions, and social media was twice as important a source of information as advertising for eco-travelers. The influence of traditional media appears to be waning. Only 5% said they got information from TV and radio advertising, and less than 1.5% used information seen on billboards. In fact, only 21.4% of respondents used traditional media (print and broadcast) to gather information about green travel — a drop of 5% from 2009.

At the same time, there was a nearly 5% jump in the number of respondents saying that peer reviews on travel websites and blogs were very influential in their vacation decisions this year. Nearly half of all respondents used peer reviews on LonelyPlanet.com, TripAdvisor.com and other Web 2.0 travel sites to validate claims of environmentally friendly travel services. 29% of respondents cited peer-review-powered third-party travel websites when evaluating a hotel's green "cred" this year, a 7% jump over last year's study. Eco-travelers looked first to each other, rather than travel providers themselves, as a resource in their travel decisions.

Significantly, internet search-based travel research dropped more than 25% among survey respondents from last year. This finding mirrors a larger trend away from traditional web searches and towards social media queries (via Facebook, Twitter, etc.) and the use of smart-phone and iPad apps. 12.4% of respondents said they used Facebook and other social media, rather than traditional internet search, as a travel information resource this year. And the 39.7% of respondents who said they had gathered information about green travel via word of mouth, may be including the trusted networks of social media in that category. Increasingly, our "conversations" are in the forum of social media — particularly for Generation Y travelers.

Trusting peers is not only a very human response, it's a Web 2.0/social media response. When so many leading sales sites offer peer reviews and discussion, customers look for that in their green travel choices as well. Facebook and Twitter are also prime influencers in this brave new world of brand awareness. In fact, the more easily green travelers can listen to peers, the less they listen to the green claims of advertisers. It's a zero-sum game, driven by younger respondents in Generation Y. The "Millennium Generation" distrusts advertising, has mixed feelings about branding and hates the hard sell.

While customers will look to third party blogs, media outlets and articles, advertising, including banner ads and ads in mainstream and environmental publications, respondents ranked advertising dead last in terms of influence.

Insight: The proof of the pudding is ever more in the tasting. In a world where a negative opinion can go viral overnight, giving the customer a positive, rewarding, unique, *genuine*, and thoroughly sustainable experience is every travel company's first order of business.

1) *Hotels Magazine* May, 2006

2) "Do "Green" Conscious Consumers Practice What They Preach? New Consumer Purchase Data Reveals That Many Do Not;" *BusinessWire*, September 29, 2008

Key Finding #10: The Return of the Travel Agent?

Conventional wisdom holds that the travel agent is a vanishing species in the Internet age. Our survey shows that when travelers have a green agenda, that's not the case. 58.1% of respondents said that they would be inclined to use the services of a travel agent trained by a certification body like ASTA to offer sustainable travel choices, up slightly from last year. In fact, almost a third of respondents had made a travel purchase from a travel agent in the last 12 months — a jump of almost 6% from respondents in the 2009 survey.

According to a study by Forrester Research, the number of U.S. leisure travelers using the Internet to book travel actually declined from 53 percent in 2007 to 46 percent in 2009 — shifting planning and transactions away from self-service on the Internet and back to traditional travel agents.

Insight: By educating themselves in sustainable travel options and eco-travel destinations, travel agents can do well in this expanding market. But they must also know their customer — the green traveler can come in many shades, from the civilized tourist who wants a comfortable but green hotel to the self-sufficient eco-adventurer. They must know the greener travel products, and access the resources to locate them. And they must practice what they preach, by greening their own operations and implementing green office best practices (i.e. paper reduction, etc.).

As our global environmental challenges continue, this market will only continue to grow. Online technologies and price pressures make both traditional and home-based travel agent work a particularly viable option.

| |
|-------------------------|
| STUDY QUALIFIERS |
|-------------------------|

CMIGreen 2010 Green Traveler Survey

Filter: "Extremely" or "Very" Eco Conscious, Travelers

Date: 9/5/2010

Time Zone in which Dates/Times Appear: (GMT-05:00) Eastern Time (US & Canada)

Filter Using: LEISURE_1 (# of Vacations that included at least one overnight) > 0 AND (GEN_2 How would you evaluate your awareness of environmental issues and related behaviors? = I consider myself extremely eco-conscious OR GEN_2 How would you evaluate your awareness of environmental issues and related behaviors? = I consider myself very eco-conscious)

Total number of responses collected: 2768

Number of Responses Analyzed: 951

VAC QUAL: *Please let us know your travel experience and interests so we can create an enjoyable survey experience for you.*

Have you taken a vacation/holiday in the past 12 months where you stayed overnight at least 50 miles/80km from home?


(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------|-------|------------------------|------------|
| Yes | | 100.0% | 951 |
| No | | 0.0% | 0 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

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CRUISE PRIOR QUAL: Did you take a cruise vacation of at least one night away from shore in the past year?

(Respondents could only choose a **single** response)



| Response | Chart | Frequency | Count |
|----------|-----------------------------------------------------------------------------------|------------------------|------------|
| No |  | 82.9% | 788 |
| Yes | | 17.1% | 163 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

17% of respondents had taken a cruise vacation in the last year.

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CRUISE FUTURE QUAL: Are you considering a cruise vacation in the future?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes |  | 53.6% | 510 |
| No |  | 46.4% | 441 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

2010 update: Cruises figured more prominently in respondents' vacation planning this year than last. Over 50% said they were considering a cruise in the future — a jump of over 14%.

Cruising has traditionally not been considered the most sustainable of choices by green travelers and the cruise industry continues to be viewed negatively by the majority of our respondents. It is unclear whether this is due to consumers presuming the cruise lines are going a lousy job in this area based on poor performance in the past or their actual understanding of the industry's current environmental practices. The cruise industry has made substantial investments to decrease its environmental footprint in recent years. So while technological and operational improvements are ongoing, it faces an equal challenging in marketing to green its reputation.¹



A bit of caution on interpreting the 53.6% figure: CMI research has historically found a bit of a disconnect between "plan to" travel in the next year, to "actual" travel in the past year. For example, whenever we provide a list of destinations respondents plan to visit in the next year, Tahiti is always very strong. Who doesn't want to go to Tahiti? Yet when we ask a year later if they actually went there, the number is comparatively low. For this data we look at the trend. Clearly with a 14% increase of intended cruise travel, planned cruise vacations among this cohort will be significantly up. But 53.6% will probably not be taking a cruise.

1) NATA Environmental Fact Sheet 2009

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BUSINESS QUAL: Have you taken a business trip in the past 12 months where you stayed overnight in a hotel at least 50 miles/80km from home?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes |  | 56.0% | 533 |
| No |  | 44.0% | 418 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

2010 update: The results from this question were the reverse of a very similar question from 2009 (which simply asked travelers if they had taken a business trip in the past 12 months). There was a nearly 11% increase in the number of people who had taken an overnight business trip, and a 9% decrease in those who had not traveled on business.

Business travel spend around the world did fall 8.8% in 2009. In fact, it was the largest drop in business travel since the recession and post 9/11 aftermath of 2001. However, the National Business Travel Foundation reports that because the economic recovery has surpassed expectations, global business travel spending is projected to reach \$896 billion in 2010 and grow to \$1.2 trillion by 2014.¹

That said, “We are entering an age of visible austerity with regards to business travel,” according to Antoine Medawar, Managing Director, Amadeus Hospitality Business Group. 47% of the 354 international executives surveyed for Amadeus’ report, “The Austere Traveler – the effect of corporate cutbacks on hotels,” said they will be taking fewer trips in the next twelve months, and over a quarter (28%) expect to downgrade from 4 and 5-star hotels.^{2,3}

1) “Global Business Travel Spend Experienced Largest Drop in 2009 Since 9/11 Recession” NBTA Foundation, August 11, 2010



2) “Business Travel Falls, Economy Class Picks Up” Airwise.com, November 17, 2009

3) “Economist Intelligence Unit predicts new age of austerity for business travelers” Cornell School of Hotel Administration, February 2, 2009

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MEETING PLNR QUAL: Do you plan or manage off-site business meetings or events?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------|-----------------------------------------------------------------------------------|-----------------|-------|
| No |  | 73.5% | 699 |
| Yes |  | 26.5% | 252 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

26.5% of respondents plan or manage business meetings or events, a 10% jump from last years group of respondents.




INTRODUCTORY QUESTIONS

GEN 1: How has the “green/sustainable” lifestyle influenced your life in the past month? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-----------------------------------------------------------------|-------|-----------|-------|
| I recycled at home | | 92.2% | 877 |
| I made an effort to conserve resources: water/gas/electricity | | 87.8% | 835 |
| I used a refillable water bottle, rather than a disposable one | | 79.5% | 756 |
| I shop with re-usable shopping bags, rather than using new ones | | 79.2% | 753 |
| I purchased local products | | 78.3% | 745 |
| I made a conscious decision to avoid buying unnecessary things | | 77.8% | 740 |
| I purchased recycled household products (paper towels, etc.) | | 73.7% | 701 |
| I recycled at work | | 72.0% | 685 |
| I purchased organic food products | | 69.0% | 656 |
| I purchased fair trade products | | 51.1% | 486 |
| I used public transportation | | 47.2% | 449 |
| I composted | | 41.7% | 397 |
| I am vegetarian and/or I reduced consumption of animal products | | 40.8% | 388 |
| I switched to or used sustainable energy sources at home | | 34.2% | 325 |
| I bicycled or walked to work | | 29.4% | 280 |

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| | | | |
|---------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| I purchased environmentally-friendly pet products |  | 28.6% | 272 |
| I used an “eco-friendly” dry cleaner |  | 17.6% | 167 |
| NONE OF THE ABOVE |  | 0.6% | 6 |
| | | Valid Responses | 951 |

Almost all respondents had taken at least some environmentally responsible actions in the last month, reflecting broad environmental awareness among the respondent panel.

2010 update: The number of respondents who took more active steps towards a sustainable lifestyle increased in this year’s survey over last year’s — while 41.7% composted, an increase of 4.2%, there was a more substantial increase of 5.7% in the more fundamental lifestyle adjustment of a vegetarian diet, and 5-13% more respondents said they bicycled or took public transportation to get to work. More respondents who loved the noun “change” were backing it up with the verb, to paraphrase sustainable business writer/entrepreneur Joel Makower.



The authoritative GfK Roper Green Gauge report found in its 2007 release that “true blue greens” who “walked the green talk” on environmental issues and took a more active role amounted to about 30% of the green consumers, a proportion roughly reflected in this respondent panel.¹

1) Ecomerge June 12, 2008 <http://ecomerge.blogspot.com/2008/06/gfk-ropers-green-gauge.html>

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GEN 2: How would you evaluate your awareness of environmental issues and related behaviors?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|---------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| I consider myself extremely eco-conscious |  | 18.5% | 176 |
| I consider myself very eco-conscious |  | 81.5% | 775 |
| I consider myself somewhat eco-conscious | | 0.0% | 0 |
| I'm not eco-conscious | | 0.0% | 0 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

Environmental awareness was universal among the respondent filter, with all respondents saying they were either very or extremely eco-conscious. However, less than 20% self-reported “extreme” eco-consciousness.

2010 update: Interestingly, while fewer respondents identified themselves as extremely eco-conscious, more respondents reported practicing intensive eco-friendly measures that would be part of a more thoroughly eco-conscious lifestyle, like composting, bicycle commuting and a vegetarian diet. It suggests that “very eco-conscious” is becoming, if not *extreme* by self-assessment, “very, very eco-conscious.”

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GEN 3: In the light of today’s simultaneous economic and environmental challenges, would you say that you have reduced, maintained or increased your “green” purchasing over the past month, even if those greener products or services might cost more than conventional alternatives?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|-----------------------------------|-------|------------------------|------------|
| Reduced green purchases | | 2.9% | 27 |
| Maintained green purchases | | 56.1% | 530 |
| Increased green purchases | | 38.9% | 368 |
| Unsure | | 2.1% | 20 |
| Not Answered | | | 6 |
| | | Valid Responses | 945 |
| | | Total Responses | 951 |

Though taking environmental action depended largely on convenience (see Chart 1), respondents’ purchasing choices showed a strong commitment to the environment. Despite the challenges of the current recession, almost all respondents still bought green products and services even if they were more expensive than their “conventional” alternatives. **2010 update:** *In fact, 5% more respondents actually **increased** their green purchases over last year.*

As Kathy Sheehan, senior vice president of GfK Roper, said, "When you look at people’s concerns in the U.S., as well as globally, yes, their concerns about the economy have gone up. But it hasn’t been at the expense of the awareness and concern about the environment. The recession has almost been a catalyst to being green."¹

1) Quoted in <http://www.greenbiz.com/blog/2009/11/09/green-consumers-and-recession-it-really-different-time>

GEN 4: Are you more or less likely to purchase from companies...

| | Very likely | Somewhat likely | Neutral | Less likely | Not likely | Total | Mean |
|---------------------------------------------------------------------|--------------|-----------------|--------------|-------------|-------------|---------------|-------|
| with favorable green policies and practices? | 67.6% | 28.5% | 3.3% | 0.2% | 0.4% | 100.0% | 1.374 |
| that sponsor green/environmental events and organizations? | 45.2% | 43.1% | 11.0% | 0.1% | 0.5% | 100.0% | 1.676 |
| that advertise in green publications and websites? | 31.9% | 37.9% | 28.0% | 1.1% | 1.1% | 100.0% | 2.014 |
| that contribute to a conservation or community development project? | 53.1% | 38.8% | 7.2% | 0.5% | 0.4% | 100.0% | 1.564 |
| Total | 49.5% | 37.0% | 12.3% | 0.5% | 0.6% | | N/A |

Corporate environmental responsibility is important to green consumers. Almost 90% of respondents were very likely or somewhat likely to choose companies that actively contributed to green projects like conservation or community development. Two thirds of respondents said that green policies and practices would make them very likely to purchase from a given company; almost half would be very likely to buy products/services from companies that supported environmental organizations and events. 70% of respondents said they would be at least somewhat likely to purchase from companies that advertised in green publications and websites.














The general population also has a preference for companies with responsible environmental practices — and the inquisitiveness to find out what those practices are. Half the respondents from a large panel questioned by in the National Marketing Institute’s 2007 LOHAS Consumer Trends Database™ were interested a company’s practices in specific areas like cutting air pollution or adopting of renewable materials. 62% of that study’s respondents wanted to know about a company’s recycling policy when considering purchasing its products, and 60% considered its commitment to waste reduction.¹

1) National Marketing Institute’s 2007 LOHAS Consumer Trends Database. ©2008 National Marketing Institute (NMI)

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GEN 5: Do you subscribe to and/or regularly read any environmental publications, websites, and/or email newsletters?

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|----------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| National Geographic |  | 38.3% | 364 |
| Other |  | 18.3% | 174 |
| Audubon |  | 9.9% | 94 |
| Mother Earth News |  | 8.7% | 83 |
| Mother Jones |  | 6.2% | 59 |
| Friends of the Earth |  | 5.8% | 55 |
| Grist |  | 5.2% | 49 |
| Utne |  | 4.7% | 45 |
| E-Environment Magazine |  | 3.9% | 37 |
| Ode |  | 3.3% | 31 |
| Ecologist, The |  | 3.0% | 29 |
| Good |  | 2.4% | 23 |
| Earth Island Journal |  | 1.5% | 14 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |








National Geographic was the most-read winner among environmentally-themed publications and websites with 38.3%, more than twice as much readership among respondents as any other publication. Advertisers like Norwegian Cruise Lines, Ford, Chase (touting its “no blackouts” frequent flyer mile program) and destinations such as Québec leveraged *National Geographic’s* nature/ecological theme (and the eco-travel focus of its sister publications, *National Geographic Traveler* and *National Geographic Adventure*) to reach in this sought-after market.

Although readership of magazines like *Audubon*, *Mother Earth News*, *Mother Jones*, and *Grist* is smaller, their very specific environmental or political perspective plays to a loyal and passionate readership who tend to be active in political, environmental causes, and who travel frequently.

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GEN 6: Over the past year, did you attend any of these events?

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|---------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Cultural events (ethnic street fairs, etc.) |  | 53.8% | 512 |
| Outdoor music festival |  | 45.3% | 431 |
| Earth Day events, activities or festivities |  | 32.1% | 305 |
| Local "Green" Festival or Expo |  | 27.2% | 259 |
| Adventure travel expo or fair |  | 14.4% | 137 |
| Yoga expo or fair |  | 7.7% | 73 |
| Other, specify: |  | 6.0% | 57 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

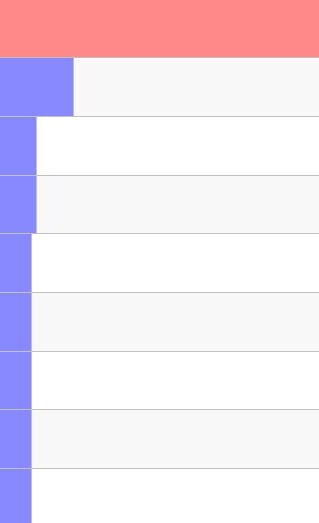
2010 update: Roughly half of the green consumers who responded to our survey had attended cultural events, street fairs and concerts (a new response choice this year), while environmentally-themed events were a strong draw. A third of them said they had attended Earth Day festivities and/or other green expos and festivals over the last year.

Premium demographic segments are well-represented at Earth Day events — the profile of an average attendee to the San Luis Obispo Earth Day Food & Wine Festival shows an income of over \$75,000. 95% of attendees to the festival have a college degree or higher. Companies reaching that demographic last year by sponsoring the Earth Day Network and local/regional Earth Day events across the country included Marriott, Virgin America, Timberland and Toyota.

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GEN 7: What country do you live in? (After the US & Canada, countries are listed alphabetically.)

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------------------|------------------------------------------------------------------------------------|--------------|------------|
| United States |  | 75.9% | 722 |
| Canada | | 11.8% | 112 |
| Australia | | 2.3% | 22 |
| United Kingdom | | 1.9% | 18 |
| Germany | | 0.7% | 7 |
| India | | 0.7% | 7 |
| Switzerland | | 0.5% | 5 |
| Portugal | | 0.4% | 4 |
| South Africa | | 0.4% | 4 |
| Mexico | | 0.3% | 3 |
| Sweden | | 0.3% | 3 |
| Syria | | 0.3% | 3 |
| Thailand | | 0.3% | 3 |
| Bangladesh | | 0.2% | 2 |
| Belgium | | 0.2% | 2 |
| Denmark | | 0.2% | 2 |
| Indonesia | | 0.2% | 2 |
| Nepal | | 0.2% | 2 |
| New Zealand | | 0.2% | 2 |
| Spain | | 0.2% | 2 |
| Vietnam | | 0.2% | 2 |
| Argentina | | 0.1% | 1 |
| Austria | | 0.1% | 1 |
| Bolivia | | 0.1% | 1 |

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















| | | | |
|-------------|--|------------------------|------------|
| Brazil | | 0.1% | 1 |
| Costa Rica | | 0.1% | 1 |
| Croatia | | 0.1% | 1 |
| Cyprus | | 0.1% | 1 |
| Ecuador | | 0.1% | 1 |
| Egypt | | 0.1% | 1 |
| France | | 0.1% | 1 |
| Greece | | 0.1% | 1 |
| Hong Kong | | 0.1% | 1 |
| Iran | | 0.1% | 1 |
| Ireland | | 0.1% | 1 |
| Italy | | 0.1% | 1 |
| Jordan | | 0.1% | 1 |
| Kuwait | | 0.1% | 1 |
| Panama | | 0.1% | 1 |
| Peru | | 0.1% | 1 |
| Philippines | | 0.1% | 1 |
| Russia | | 0.1% | 1 |
| Slovenia | | 0.1% | 1 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

As this table indicates, most respondents (87.7%) in the study live in North America — 75.9% in the United States and another 11.8% in Canada. With the exception of Australia and the United Kingdom, other nations had a representation of less than 1% each among respondents.

LEISURE TRAVEL

LEISURE 1: How many vacations have you taken in the past 12 months, where you were away at least one night? (# of Vacations that included at least one overnight)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| 1 |  | 11.1% | 106 |
| 2 |  | 24.2% | 230 |
| 3 |  | 21.8% | 207 |
| 4 |  | 14.5% | 138 |
| 5 |  | 9.8% | 93 |
| 6 |  | 7.2% | 68 |
| 7 |  | 2.4% | 23 |
| 8 |  | 2.5% | 24 |
| 9 |  | 0.5% | 5 |
| 10 |  | 2.5% | 24 |
| 11 |  | 0.3% | 3 |
| 12 |  | 1.3% | 12 |
| 15 |  | 0.5% | 5 |
| 20 |  | 0.6% | 6 |
| 24 |  | 0.2% | 2 |
| <i>Other Responses</i> |  | 0.5% | 5 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |



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2010 update: Respondents participated in leisure travel relatively frequently. More than 88% had taken at least two vacations away from home during the last year (with overnight stays of at least one night), and 32% took 5-8 vacations during that time. That's far more than the national average—a 2008 poll conducted by the Opinion Research Corporation found that 29 percent of American workers took no paid vacation time last year and another 24 percent took one vacation of a week off or less. In fact, according to John de Graaf, co-author of *Affluenza: The All-Consuming Epidemic* and executive director of Take Back Your Time, the number of Americans taking *any* family vacations has dropped by a third in the past generation.¹

In 2006 — a pre-recessionary environment — only 14% of Americans took summer vacations at all, according to *Time Magazine*.

























By contrast, 7% of respondents in this survey were very frequent leisure travelers, having taken between nine and 30 vacations with overnight stays over the past year.

1) www.sfgate.com, Sunday, August 17, 2008 <http://www.sfgate.com/cgi-bin/article.cgi?f=/c/a/2008/08/15/TRP11224CU.DTL>










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LEISURE 2: About how many nights did you spend in hotels/inns/resorts in the past 12 months? (For vacation/personal travel)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|-----------|-------------------------------------------------------------------------------------|--------------|-----------|
| 0 |  | 4.1% | 38 |
| 1 |  | 3.3% | 31 |
| 2 |  | 6.0% | 56 |
| 3 |  | 6.1% | 57 |
| 4 |  | 4.4% | 41 |
| 5 |  | 6.5% | 60 |
| 6 |  | 4.7% | 44 |
| 7 |  | 4.5% | 42 |
| 8 |  | 4.2% | 39 |
| 9 |  | 2.5% | 23 |
| 10 |  | 10.0% | 93 |
| 11 |  | 1.0% | 9 |
| 12 |  | 5.3% | 49 |
| 13 |  | 0.6% | 6 |
| 14 |  | 3.4% | 32 |
| 15 |  | 5.8% | 54 |
| 16 |  | 1.0% | 9 |
| 17 |  | 1.0% | 9 |
| 18 |  | 1.4% | 13 |
| 20 |  | 6.0% | 56 |
| 21 |  | 1.0% | 9 |
| 22 |  | 0.8% | 7 |
| 23 |  | 0.5% | 5 |
| 24 |  | 1.3% | 12 |

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














| | | | |
|------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| 25 |  | 2.0% | 19 |
| 26 | | 0.2% | 2 |
| 28 |  | 1.0% | 9 |
| 30 |  | 3.8% | 35 |
| 31 | | 0.3% | 3 |
| 35 |  | 1.4% | 13 |
| 36 |  | 0.4% | 4 |
| 38 | | 0.2% | 2 |
| 40 |  | 1.3% | 12 |
| 42 | | 0.2% | 2 |
| 45 | | 0.3% | 3 |
| 50 |  | 0.9% | 8 |
| 60 |  | 0.8% | 7 |
| 100 | | 0.2% | 2 |
| <i>Other Responses</i> |  | 1.4% | 13 |
| | | Valid Responses | 928 |
| | | Total Responses | 928 |

Respondents not only traveled frequently for leisure, they were active customers of hotels, inns and resorts, staying an average of 10 nights for vacation and personal travel in the last 12 months — and some as many as 200 nights.

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LEISURE 2: About how many nights did you spend in hotels/inns/resorts in the past 12 months? (For business)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|----------|-------------------------------------------------------------------------------------|-----------|-------|
| 0 |  | 27.6% | 189 |
| 1 |  | 7.9% | 54 |
| 2 |  | 10.8% | 74 |
| 3 |  | 6.0% | 41 |
| 4 |  | 6.6% | 45 |
| 5 |  | 7.9% | 54 |
| 6 |  | 3.8% | 26 |
| 7 |  | 4.5% | 31 |
| 8 |  | 1.9% | 13 |
| 9 |  | 0.6% | 4 |
| 10 |  | 4.7% | 32 |
| 12 |  | 2.5% | 17 |
| 13 |  | 0.3% | 2 |
| 14 |  | 1.3% | 9 |
| 15 |  | 2.3% | 16 |
| 18 |  | 0.3% | 2 |
| 19 |  | 0.3% | 2 |
| 20 |  | 2.8% | 19 |
| 24 |  | 0.6% | 4 |
| 25 |  | 0.9% | 6 |
| 30 |  | 2.2% | 15 |
| 31 |  | 0.3% | 2 |
| 35 |  | 0.4% | 3 |
| 40 |  | 0.7% | 5 |



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



| | | | |
|------------------------|--|------------------------|------------|
| 50 | | 0.4% | 3 |
| 100 | | 0.4% | 3 |
| <i>Other Responses</i> | | 1.9% | 13 |
| | | Valid Responses | 684 |
| | | Total Responses | 684 |

2010 update: Significantly more respondents were traveling for business in this year's survey over 2009. While last year 42% of respondents did not stay at hotels, inns or resorts while on business, only 27.6% did not stay in hotels while on business travel in this survey. About 45% stayed between 2-10 nights in hotels, inns and resort, also a significant increase. Some respondents indicated that they stayed at hotels for as many as 200 nights during the 12-month period for personal or vacation travel.





















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LEISURE 3: For your own personal travel (not business), about **how much did you spend** on yourself for travel services in the past 12 months, including airfare, accommodations, ground transportation, tours, cruises, etc., and including entertainment and dining while away?

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|----------|-------------------------------------------------------------------------------------|-----------|-------|
| 0 |  | 0.5% | 4 |
| 100 | | 0.2% | 2 |
| 150 | | 0.3% | 3 |
| 200 |  | 0.8% | 7 |
| 250 | | 0.3% | 3 |
| 260 | | 0.2% | 2 |
| 300 |  | 1.3% | 11 |
| 400 |  | 0.9% | 8 |
| 500 |  | 3.8% | 33 |
| 600 |  | 1.3% | 11 |
| 700 |  | 0.9% | 8 |
| 800 |  | 2.1% | 18 |
| 900 | | 0.2% | 2 |
| 1000 |  | 7.3% | 64 |
| 1100 |  | 0.5% | 4 |
| 1200 |  | 2.4% | 21 |
| 1500 |  | 4.2% | 37 |
| 1600 | | 0.2% | 2 |
| 1700 | | 0.3% | 3 |
| 1800 |  | 0.6% | 5 |
| 2000 |  | 10.2% | 89 |
| 2200 | | 0.2% | 2 |

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| | | | |
|------------------------|-------------------------------------------------------------------------------------|--------------|-----------|
| 2300 | | 0.2% | 2 |
| 2500 |  | 4.0% | 35 |
| 2700 | | 0.2% | 2 |
| 3000 |  | 10.7% | 93 |
| 3200 | | 0.2% | 2 |
| 3500 |  | 1.7% | 15 |
| 4000 |  | 7.2% | 63 |
| 4500 |  | 0.7% | 6 |
| 5000 |  | 9.5% | 83 |
| 5500 |  | 0.6% | 5 |
| 6000 |  | 4.0% | 35 |
| 6300 | | 0.2% | 2 |
| 6500 |  | 0.6% | 5 |
| 7000 |  | 2.9% | 25 |
| 7500 |  | 0.5% | 4 |
| 8000 |  | 2.4% | 21 |
| 9000 |  | 0.9% | 8 |
| 9500 | | 0.2% | 2 |
| 10000 |  | 4.0% | 35 |
| 11000 | | 0.3% | 3 |
| 12000 |  | 1.6% | 14 |
| 15000 |  | 0.8% | 7 |
| 17000 | | 0.2% | 2 |
| 20000 |  | 1.1% | 10 |
| 25000 |  | 0.5% | 4 |
| 30000 |  | 0.8% | 7 |
| <i>Other Responses</i> |  | 4.9% | 43 |



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| | | |
|--|------------------------|------------|
| | Valid Responses | 872 |
| | Total Responses | 872 |

2010 update: Green travelers spent a median of \$3000 while on personal travel in the last 12 months, an increase of \$500 over the previous 12 months. The Commerce Department reported that U.S. spending on travel and tourism declined in 2008 for the first time since 2001, as Americans canceled vacations and businesses slashed travel budgets.¹

Travel spending continued to decline in 2009, though at a much less precipitous rate than the 22% slide in the 4th quarter of 2008.² Leisure/personal travel spending is expected to rise by a modest 2.0% in 2010 after two years of declines.³

1) "Travel Spending Sinks Sharply" Wall Street Journal, March 20, 2009

2) U.S. Department of Commerce, Bureau of Economic Analysis Industry Economic Accounts, September 23, 2009

3) "Industry Perspective" U.S. Travel Association, November. 2009

LEISURE 4: In the past 12 months, where have you traveled with at least one overnight? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-------------------------|-------|------------------------|------------|
| USA | | 82.2% | 782 |
| Europe | | 24.3% | 231 |
| Canada | | 21.2% | 202 |
| Caribbean | | 13.8% | 131 |
| Mexico | | 12.3% | 117 |
| Asia | | 11.8% | 112 |
| Central / South America | | 10.4% | 99 |
| Africa | | 4.7% | 45 |
| Australia/Pacific | | 4.7% | 45 |
| Middle East | | 3.6% | 34 |
| | | Valid Responses | 951 |
| | | Total Responses | 951 |

A considerable majority of respondents — more than eight out of ten — traveled within in the United States and stayed at least one night away from home in the past year. **2010 Update:** There was also an increase in travel to Europe and Canada of 4-5% over the previous 12 months, with a quarter of respondents having traveled to Europe, and more than 1 in 5 traveling to Canada. 10-14% of respondents also traveled to Mexico, the Caribbean and/or Central/South America.

















The strong trend towards travel within the USA is in keeping with challenging economic conditions. While many Americans chose “staycations,” those who did travel favored domestic “nearcations.” An American Express survey noted that vacationers seeking value favored “Tried-and-True Travel” — going to places that were familiar already, rather than “gambling” on the uncertain return of an entirely new and exotic destination.¹

1) “Top Travel Trends, Tips, and Destinations for 2009” *U.S. News and World Report*, January 16, 2009

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LEISURE 5: In the past twelve months, what types of vacation did you take with at least one overnight? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-----------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Personal travel (visit family or friends) |  | 70.6% | 671 |
| Independent travel: I researched and booked each part on my own |  | 56.0% | 533 |
| City / urban |  | 43.5% | 414 |
| "Staycation" (exploring closer to home) |  | 27.8% | 264 |
| Resort vacation |  | 26.7% | 254 |
| Adventure vacation (combo of physical, outdoor and cultural) |  | 24.9% | 237 |
| Independent "packaged" trip (bundled air/car/hotel) |  | 13.6% | 129 |
| Organized group tour |  | 13.2% | 126 |
| Cruise |  | 13.2% | 126 |
| Festival |  | 12.4% | 118 |
| Car camping |  | 11.7% | 111 |
| Backpacking |  | 11.6% | 110 |
| Educational tour |  | 6.9% | 66 |
| Volunteer trip |  | 6.2% | 59 |
| Other |  | 5.7% | 54 |
| Motor home/trailer vacation |  | 3.7% | 35 |
| | | Valid Responses | 951 |
| And | Total Responses | | 951 |

2010 update: Almost all forms of vacation travel were up over last year's survey, though personal travel — visits to family and friends — was actually down slightly, indicating that respondents were taking vacations more frequently for themselves, and not simply out of familial and social obligations. Predictions that "staycations" would be an even more popular trend in 2010 than 2009 were borne out among respondents, with a 5% more of them taking their



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


vacations close to home, either in response to economic conditions and/or environmental concerns. But whether domestically or internationally, respondents were taking vacations seriously this year —resort and adventure vacations and backpacking were up by 4-6%.

Responses revealed a remarkable variety in the types of travel, from cities (43.5%) to car camping to voluntourism (a combined 17.9%). **One other significant result: almost 5% more respondents indicated that they had researched and booked their vacations on their own this year.**

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LEISURE 6: Have you used any of the following travel-specific websites in the past 12 months? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Travelocity |  | 60.6% | 566 |
| Expedia |  | 55.7% | 520 |
| Airline Websites |  | 49.5% | 462 |
| TripAdvisor |  | 43.4% | 405 |
| Orbitz |  | 39.7% | 371 |
| Hotel Websites |  | 37.6% | 351 |
| Hotels.com |  | 34.2% | 319 |
| Kayak |  | 34.0% | 318 |
| A destination's website (the tourism office or visitor's bureau) |  | 30.7% | 287 |
| Priceline |  | 25.2% | 235 |
| Hotwire |  | 24.4% | 228 |
| AAA |  | 22.3% | 208 |
| Gap Adventures |  | 14.2% | 133 |
| Travel Agent |  | 12.0% | 112 |
| Other |  | 10.2% | 95 |
| A dedicated eco-tourism website |  | 9.1% | 85 |
| SideStep |  | 7.5% | 70 |
| | | Valid Responses | 934 |
| | | Total Responses | 934 |

2010 update: With more respondents indicating that they were researching their own vacations this year, it is not surprising that use of the most popular travel websites jumped in the past year. 60.6% of respondents used the top site, Travelocity [a study partner this year, and a contributor of survey panelists], compared to 49.7% last year, while Expedia was used 7% more. The use of at least one travel website rose over 10% in the past 12 months. New to this year's study, airline



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websites showed they were a popular choice for self-planners, and were used by almost half of respondents.

The number of respondents who said they had visited dedicated eco-tourism sites, 9.1% — a slight increase over last year — corresponded with an increase in the number who cited eco-tourism as a reason for traveling in LEISURE 9, below.

Many eco-tourism sites — such as [International EcoTourism Society](#), [EcoTourism at Conservation International](#) and [Ecotourism.net](#) — offered respondents information about destinations and routes, as well as online communities. Independent online booking sites like [rezhub.com](#) and [wholetravel.com](#) are very popular with ecoconscious globetrotters. Yet an increasing number of mainstream, sales/booking oriented sites have begun catering to the green travel and ecotourism market using their own “environmental friendliness” criteria — [Travelocity](#), [Orbitz](#), [Ecotourism](#) and [Kayak](#) are good examples.

Based on a recent Travelocity survey in which 59 percent of respondents said a “green” rating would have some influence in their hotel selection, the travel site established its Green Hotel Directory. To date, Travelocity is the only major online travel company to flag eco-friendly hotels in the regular shopping path, meaning consumers can distinguish green and non-green offerings at a glance. And in order to show discriminating eco-tourists that Travelocity’s initiative is a trusted resource that goes beyond “greenwashing” to offer meaningful, sustainable travel choices, the company is also an active member in the Global Sustainable Tourism Council (GSTC Partnership). This council was established in 2008 by the Rainforest Alliance and the United Nations and developed the Global Sustainable Tourism Criteria, a comprehensive definition of what it means to be a sustainable tourism provider.¹ Travelocity's Green Hotel Directory works with second- and third-party green hotel certification programs whose standards closely align with the [Global Sustainable Tourism Criteria \(GSTC\)](#) and who can guarantee an audit.

Orbitz’s Eco-Tourism microsite — reached from [eco.orbitz.com](#) — offers users articles on eco-travel, top eco-friendly destinations, top green hotels, eco volunteer opportunities and eco-travel tips.

Sites specific to popular ecotravel destinations like [EcoTourism Panama](#), [Costa Rica Ecotourism.com](#) and [EcoTourism Australia.com](#) were also mentioned by respondents.






Note that Gap Adventures, new to this year’s study, contributed survey panelists, and is therefore likely to be over-represented as a proportion of sites visited.

1) [travelmole.com](#), “Sustainable Travel” January 26, 2009

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LEISURE 7: With whom did you travel on your most recent vacation? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|---------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| With partner/spouse |  | 51.1% | 477 |
| With family |  | 32.8% | 306 |
| With friend(s) |  | 26.1% | 244 |
| I traveled alone |  | 23.4% | 219 |
| In a tour group |  | 5.6% | 52 |
| | | Valid Responses | 934 |
| | | Total Responses | 934 |

“Significant others” were again the most frequent travel companions for respondents — over half said they had traveled with partners/spouses on their most recent vacation. **2010 update: 5% fewer were traveling alone this year, but at 23.4%, far more than the roughly 10% in the general population who travel solo, according to the Travel Industry Association (TIA).**





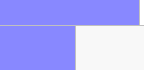



More people may be choosing to solo travel, as friends and family face financial hardship. In the UK, a recently released survey conducted by online travel specialists ebookers.com showed that nearly 15 per cent of vacationers took “solidays” in the past year, with would-be companions bearing the brunt of the global recession.¹

Traveling alone is particularly popular with younger travelers in the 18-to-35 group, who make up the largest sector of solo travelers, accounting for 35 percent. Less than 6% of respondents had taken their most recent vacation with an organized tour group.

1) “Recession increases demand for solo holidays” Independent (UK) November 19, 2009

LEISURE 8: Which of these were the main factors influencing your most recent choice of vacation destination(s)? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|---------------------------------------------------------------|------------------------------------------------------------------------------------|------------------------|------------|
| Desire to explore the destination |  | 53.7% | 502 |
| Geographical location |  | 49.8% | 465 |
| Visit friends/family |  | 45.6% | 426 |
| Price/good deal |  | 39.0% | 364 |
| Activities available there |  | 37.0% | 346 |
| Environmental/sustainable/socially responsible considerations |  | 20.0% | 187 |
| Recommendation from friend/family |  | 12.7% | 119 |
| Other |  | 8.6% | 80 |
| | | Valid Responses | 934 |
| | | Total Responses | 934 |

2010 update: In line with LEISURE 5, visits to friends and family were not the main reason travel with this group —with friend and family visits dropping 10% from last year while the desire to explore the destination was a most significant travel driver this year (with an increase of over 4%).

20% of respondents cited environmental and social responsibility as main influences in their choice of destination. While that represented a jump of 4%, almost twice as many said prices and value were a greater priority when deciding where to go on vacation. The July, 2009 edition of the quarterly consumer survey travelhorizons (co-authored by the U.S. Travel Association and Ypartnership) found that among all U.S. travelers there is greater familiarity with the details of sustainable travel than two years ago, yet travelers are not more open to paying more for eco-friendly travel options.

"Travel service suppliers should therefore continue to adopt green practices that have a minimum impact on consumers' wallet," said Peter Yesawich, chairman and CEO of Ypartnership.¹

"Consumers are looking for 'green travel' choices at the right price," said Roger Dow, president and CEO of U.S. Travel Association. "The travel community has developed thousands of options and we are adding more daily."²



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1, 2) Quoted in “Travelers Unwilling to Pay More For Green Travel” *Sustainable Travel* blog, August 26, 2009
http://blog.sustainabletravel.com/travelers_unwilling_to_pay_mor.html



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LEISURE 9: How would you define the “purpose” of your most recent vacation? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|--------------------------------------------------------------------------------------------------------------|-------|------------------------|------------|
| Rest and relaxation | | 56.5% | 528 |
| Enjoy nature | | 43.8% | 409 |
| Enhance relationship with spouse/partner/family/friends | | 42.9% | 401 |
| Personal enrichment | | 37.8% | 353 |
| Cultural experience/understanding | | 31.9% | 298 |
| Adventure | | 31.7% | 296 |
| Photography/arts | | 14.2% | 133 |
| Education | | 14.0% | 131 |
| Physical development/exercise | | 12.2% | 114 |
| Romance | | 11.8% | 110 |
| Eco travel | | 10.8% | 101 |
| Network or make new friends | | 7.8% | 73 |
| Sports such as fishing, golf, sailing or tennis | | 7.8% | 73 |
| Other | | 7.6% | 71 |
| Spiritual pursuit | | 6.4% | 60 |
| Therapeutic/health/spa | | 5.0% | 47 |
| To contribute positively to the destination (volunteered, donated, participated in environmental work, etc.) | | 4.6% | 43 |
| Medical treatment | | 0.6% | 6 |
| | | Valid Responses | 934 |
| | | Total Responses | 934 |



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2010 update: Responses about the purpose of vacation travel were nearly evenly divided between the appeal of the destination itself and perceived benefits for personal well-being and relationships. Interestingly, enjoying nature and enhancing relationships switch places in this year's survey, with over 9% more respondents than last year indicating that the enjoyment of nature was the purpose of their most recent vacation.

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LEISURE 10: What is your understanding of what “green travel” is, or should be?
(Which top five elements can help make traveling more green/sustainable?) Rank up to five.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---------------------------------------------------------------------------------------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Carbon neutral offsets built into pricing | 4.7% | 6.3% | 8.4% | 7.9% | 9.3% | 7.8% | 7.1% | 3.6% | 9.1% | 2.5% |
| Authentic interaction with locals | 6.5% | 6.5% | 8.9% | 9.0% | 7.4% | 7.8% | 8.6% | 14.5% | 11.4% | 12.5% |
| Eco-friendly hotel (e.g. runs on renewable energy sources, recycles, re-uses linens instead of washing daily, etc.) | 35.6% | 20.6% | 12.4% | 9.8% | 8.6% | 2.9% | 1.4% | 3.6% | 2.3% | 0.0% |
| Includes local volunteer activities | 1.5% | 2.7% | 3.5% | 5.6% | 5.3% | 4.9% | 10.0% | 3.6% | 11.4% | 10.0% |
| Company donates to green/environmental causes | 6.3% | 7.9% | 8.8% | 11.9% | 11.7% | 15.7% | 11.4% | 10.9% | 6.8% | 5.0% |
| Qualifies for a recognized, third-party green certification | 5.6% | 8.2% | 7.2% | 8.6% | 9.9% | 9.8% | 7.1% | 5.5% | 2.3% | 7.5% |
| Spiritual content or sacred places | 1.6% | 2.2% | 2.5% | 1.8% | 1.4% | 1.0% | 7.1% | 0.0% | 9.1% | 5.0% |
| Peer-related learning | 0.5% | 0.8% | 0.4% | 1.4% | 1.1% | 1.0% | 1.4% | 14.5% | 2.3% | 5.0% |
| Interactive | 1.2% | 1.3% | 2.8% | 2.5% | 3.2% | 11.8% | 2.9% | 5.5% | 6.8% | 15.0% |
| Cultural | 2.7% | 3.8% | 4.7% | 4.6% | 5.9% | 9.8% | 7.1% | 7.3% | 11.4% | 17.5% |
| Guided Learning | 1.5% | 1.0% | 1.6% | 3.2% | 2.7% | 3.9% | 8.6% | 10.9% | 11.4% | 7.5% |
| Sources from local businesses | 9.7% | 11.6% | 13.4% | 10.4% | 9.9% | 6.9% | 5.7% | 5.5% | 2.3% | 2.5% |
| Uses mass transit and/or renewable energy vehicles | 11.6% | 13.4% | 13.7% | 10.7% | 10.6% | 5.9% | 11.4% | 3.6% | 13.6% | 5.0% |
| Company gives back to local community | 10.9% | 13.8% | 11.7% | 12.5% | 13.1% | 10.8% | 10.0% | 10.9% | 0.0% | 5.0% |

This chart gets to the heart of one of the problems in gauging the size of the green or eco travel



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market. Even within this survey's self-qualified respondent panel, what green travel is depends on whom you ask. And is green travel the same thing as eco-conscious travel, or eco tourism, or sustainable travel? The terminology itself is still being defined. If green travel minimizes one's environmental footprint, then how and to what extent? Is it the resources consumed in traveling? Or bathing? Should broader lifestyles be considered, like adopting a vegetarian diet or commuting by bicycle? Does green travel mean a deeper engagement with the destination community, e.g. outdoor exploration, volunteer activity, educational activities or cultural or spiritual immersion?



For 56.2% of respondents, the most important or second most important element of green travel was a green hotel. According to research done by the Texas-based Green Hotel Association, 43 million U.S. travelers say they are concerned about the environment. Premium hotel brands such as Fairmont, Kimpton and Aloft have comprehensive green programs.

Sustainable transportation was the third-most-associated green travel component — in response, car rental industry leaders Hertz, Budget and Avis have added more fuel-efficient cars to their fleet, while more and more limousine companies are using hybrids.

2010 update: For more than half of respondents, corporate/business support for the local community and for environmental causes was an important component of green travel.

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LEISURE 11: In the past 12 months, have you been on what you consider to be a “greener” vacation, i.e. including some of the green elements or features noted above?
 (Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes |  | 65.6% | 571 |
| No |  | 34.4% | 300 |
| | | Valid Responses | 871 |
| | | Total Responses | 871 |

2010 update: Substantially more respondents “walked the walk” when it came to green travel this year, with 65.6% saying they had taken a vacation in the last 12 months that included some of the green components cited in LEISURE 10 — an increase of over 11%.

The July, 2009 travelhorizons survey found that while consumers believe businesses had a responsibility in making travel more sustainable, 54 percent of respondents to that survey also believed that it was travelers themselves who had the greatest responsibility to preserve and protect the environment.¹

1) “Travelers Unwilling to Pay More For Green Travel” *Sustainable Travel* blog, August 26, 2009
http://blog.sustainabletravel.com/travelers_unwilling_to_pay_mor.html

LEISURE 12: About how much extra did you pay in order to decrease your ecological footprint while on your most recent trip?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|------------------------------------------------------------|-------|------------------------|------------|
| Did not pay extra | | 62.0% | 346 |
| 1% - 5% more than the cost of a similar, conventional trip | | 25.3% | 141 |
| 6% - 10% more | | 9.0% | 50 |
| > 10% more | | 3.8% | 21 |
| Not Answered | | | 10 |
| | | Valid Responses | 558 |
| | | Total Responses | 568 |

2010 update: 87.3% of travelers paid between 1 and 5%, which represents more than a 13% increase over 2009. 62% of respondents did not pay much more than they would for conventional travel to reduce their environmental footprint. More than a third of respondents did, however, pay between 1% and 10% to offset the carbon footprint and other environmental costs of their most recent trip.

Respondents' answers were in line with numerous industry surveys and studies in the U.S. and other developed markets showing that show a low ceiling on the additional costs of green travel. The travelhorizons survey found that among consumers willing to pay higher more for eco-friendly options, 39 percent would pay as much as a 5% premium to an environmentally responsible supplier — about as many would pay between 5 and 9 percent more.¹ A study conducted among German households by GfK Panel Services Deutschland suggested that a travel-oriented business cannot expect to realize any ROI from green certification with more than an 8% increase in prices.²

Indeed, CMIGreen recommends *not* looking at end-user pricing as a means of increasing revenues or ROI from green marketing. ROI has been repeatedly demonstrated to come from the operational side in terms of savings and efficiency, making the “green tax” unnecessary for the company.

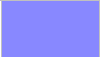





1) “Travelers Unwilling to Pay More For Green Travel” *Sustainable Travel* blog, August 26, 2009
http://blog.sustainabletravel.com/travelers_unwilling_to_pay_mor.html

2) “What Will Consumers Pay for a Green Vacation?” Christine Lepisto, Treehugger.com, March 15, 2009
<http://www.treehugger.com/files/2009/03/what-consumers-pay-for-green-vacation.php>

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LEISURE 14: What percentage of your overall travel in the past 12 months would you consider “greener” than during the previous 12 months, i.e. consciously including sustainable elements or features?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| 0% |  | 17.9% | 145 |
| 1-25% |  | 52.2% | 424 |
| 26-50% |  | 18.3% | 149 |
| 51-74% |  | 7.0% | 57 |
| 75-99% |  | 3.6% | 29 |
| 100% |  | 1.0% | 8 |
| Not Answered | | | 22 |
| | | Valid Responses | 812 |
| | | Total Responses | 834 |

More than half of respondents said that up to a quarter travel was greener than it was in the previous year. For 7% of respondents, more than half of travel was greener than it was the year before, while slightly fewer respondents than 2009 said there was no change in the amount of green travel they did in the last 12 months.

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LEISURE 15: What do you think are the most important positive contributions of travel towards the environment? (Rank up to three).

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | Total | Mean |
|-------------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|-------|
| Supports local communities and economies | 25.6% | 18.0% | 19.2% | 22.2% | 11.7% | 22.7% | 5.3% | 20.8% | 2.069 |
| Highlights the importance of natural parks and habitats | 14.5% | 18.7% | 19.4% | 16.3% | 22.1% | 9.1% | 5.3% | 17.3% | 2.285 |
| Promotes a culture that values the environment | 16.9% | 18.1% | 16.4% | 14.8% | 19.5% | 13.6% | 26.3% | 17.1% | 2.232 |
| Creates advocates for endangered locations, species, cultures | 12.7% | 19.4% | 17.6% | 20.7% | 16.9% | 13.6% | 15.8% | 16.7% | 2.339 |
| Educates traveler on environmental diversity | 18.3% | 19.4% | 20.7% | 16.3% | 20.8% | 0.0% | 0.0% | 18.9% | 2.179 |
| I don't think travel has any positive effect on the environment | 3.9% | 1.1% | 1.1% | 3.0% | 3.9% | 13.6% | 47.4% | 2.7% | 2.797 |
| I think travel is neutral -- it does as much harm as it does good | 8.1% | 5.2% | 5.6% | 6.7% | 5.2% | 27.3% | 0.0% | 6.5% | 2.169 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | | N/A |

More than a quarter of respondents felt that the most important direct benefits of travel was to destination communities and economies. Almost half of respondents also said that travel inspired awareness of environmental diversity, environmental culture and the importance of protecting endangered locations, species and cultures.



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Very few respondents felt that travel did not have a net positive effect on the environment.

The more positive views about the benefits of environmentally sensitive travel are borne out by other research as well. Nature Conservancy, the Virginia-based environmental group, found in a 2007 study of communities within four recently protected marine zones in the Pacific that conservation schemes had had a positive effect on the environment, boosting fish catches as well as doubling incomes in Fiji over five years.¹ Of course, even responsible travel to sensitive areas does have an impact on the environment. A report on the long term effects of ecotourism to nature preserves in Costa Rica concluded that while the effect of human contact is inevitable, there was a clear net benefit of preventing despoliation from destructive agriculture, mining and industrialization.²


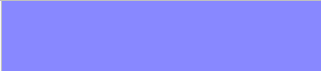




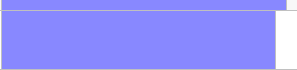
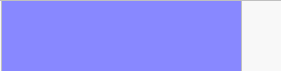






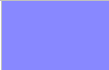


1) "Ecotourism benefits nature and reduces poverty" *New Scientist* No. 2633, 12 December 2007

2) "The Pros and Cons of Ecotourism in Costa Rica" Julie Dasenbrock. *TED Case Studies* No. 648, January, 2002

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LEISURE 16: Which measures have you taken to be a “greener” traveler in the past 12 months? (Mark all that apply):

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-----------|-------|
| I turned off lights and/or air conditioning when I left the room |  | 85.9% | 716 |
| I re-used hotel sheets and towels to conserve resources |  | 78.5% | 655 |
| I recycled |  | 77.7% | 648 |
| I ate local cuisine (i.e., minimized transportation of food) |  | 73.5% | 613 |
| I brought and used a reusable water bottle |  | 71.8% | 599 |
| I brought and used a reusable shopping bag |  | 68.7% | 573 |
| I conserved water |  | 65.7% | 548 |
| I purchased locally-made crafts |  | 57.1% | 476 |
| I traveled by train or other public transportation |  | 53.5% | 446 |
| I walked and/or bicycled to most activities |  | 46.9% | 391 |
| I ate organic and/or vegetarian meal(s) |  | 44.8% | 374 |
| I helped spread the word about green travel by sharing my experience / advice with others |  | 29.7% | 248 |
| I provided feedback regarding travel company's or hotel's environmental performance |  | 28.8% | 240 |
| I researched and booked “greener” accommodations |  | 26.5% | 221 |
| I rented a high-mileage, more fuel-efficient car |  | 22.9% | 191 |
| I have offset the impact of my travel (i.e., purchased carbon offsets) |  | 16.2% | 135 |
| I participated in a volunteer project while on my vacation |  | 8.4% | 70 |

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| | | |
|------------------------------------------------------------------------------|------|------------|
| I participated in an environmental conservation project while on my vacation | 7.6% | 63 |
| Other | 2.9% | 24 |
| Valid Responses | | 834 |
| Total Responses | | 834 |

As seen in respondents' answers about environmental actions in Chart 1, *convenience* factors significantly in "greening" travel. While almost 85% of respondents switched off lights and air conditioning to save power, and about 75% re-used sheets and towels and recycled waste, less than a third made lifestyle-changing or time-intensive choices like a vegetarian diet, researching green accommodations — or offsetting the environmental impact of their travel.




Accusations of hypocrisy leveled at famously "green" celebrities like Sir Paul McCartney, or even Al Gore, usually center on the central paradox of ecotravel: the effect of responsible and sensitive environmental behavior in any destination is negated by traveling to get there. Particularly so in reaching a remote, pristine ecosystem like the Amazon. Air travel has an inherently large carbon footprint: 2000 miles generates a ton of CO₂.

Not surprisingly, carbon offset schemes are a hot topic in the travel industry. Travel providers can now integrate the purchase of carbon offsets into a booking platform like Atlas-Blue.com's, along with messaging about a company's environmental policies. Orbitz offers carbon offsets through Carbonfund to passengers when booking travel through them. The website Carbon Offsets Daily lists dozens of major travel organizations, including booking services, airlines, airports, hotels and automobile manufacturers. Boeing's coming 787 Dreamliner was designed with reduced carbon emissions in mind.

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LEISURE 17: When you traveled on vacation in the past 12 months were you:

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| More conscious of the impact your actions had on the environment |  | 56.9% | 468 |
| No change – same as always |  | 41.9% | 345 |
| Less conscious of the impact your actions had on the environment |  | 1.2% | 10 |
| Not Answered | | | 11 |
| | | Valid Responses | 823 |
| | | Total Responses | 834 |

While 42% of this study's respondents said there was no change in their awareness of their environmental impact, other responses in this survey indicate that as a group, respondents *already* have a greater level of environmentally awareness than the general population — and the more critical factor is how that awareness is (or is not) translating into greener travel choices. Certainly, almost no respondents had *less* awareness of the environmental impact of their travel during the last 12 months.

There has been continued growth in awareness among U.S. travelers of the term “green travel,” as shown by other studies — 9% in July 2007 to 22% in July 2009 as shown in the July, 2009, travelhorizons survey. The same study showed a 42% increase in familiarity with the term “carbon footprint” to 54%, a figure very close to the number of respondents in this study who reported greater environmental awareness.¹

1) “Green Awareness Up, But Travelers Unwilling To Pay Extra” *Hotels*, August 25, 2009
<http://www.hotelsmag.com/article/CA6685808.html>

LEISURE 18: In the past 12 months, how have your environmental concerns impacted your discretionary travel (vacation, visiting friends/family) decisions, if any?
(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------------------------------------------------------------------------------|-------|------------------------|------------|
| I'm concerned, and did something about it (e.g. carbon offset purchase) | | 36.8% | 296 |
| I'm concerned, but traveling greener costs more and I couldn't afford the difference | | 13.2% | 106 |
| I'm concerned, but wasn't sure what to do | | 28.1% | 226 |
| I'm not really concerned either way; I traveled the same as always | | 15.2% | 122 |
| I'm so concerned that I traveled less because of it | | 6.5% | 52 |
| Severe concern: I considered giving up discretionary travel entirely | | 0.4% | 3 |
| Not Answered | | | 29 |
| | | Valid Responses | 805 |
| | | Total Responses | 834 |

2010 update: There was a 5% jump from last year's survey in the number of respondents who acted on their environmental concerns while they traveled. A little over 13% of respondents had environmental concerns about their travel but either could not afford to reduce/offset it or, in the case of almost 28% respondents, did not know how. 15% of travelers were not bothered by the environmental impact of their travel.

Studies have suggested that even with growing awareness of the environmental impact of air travel, few travelers are flying less for ecological reasons. In one British study, 32% of respondents agreed that passengers should pay more to fly, in carbon offsets or government surcharges, to account for aviation's environmental impact, yet fewer than one in five people would reduce the number of flights they take for environmental reasons.¹

“The carbon offset has become this magic pill, a kind of get-out-of-jail-free card,” said Justin Francis, the managing director of Responsible Travel, one of the world’s largest green travel companies to embrace environmental sustainability. “It’s seductive to the consumer who says, ‘It’s \$4 and I’m carbon-neutral, so I can fly all I want.’ ” In October, 2009 Responsible Travel



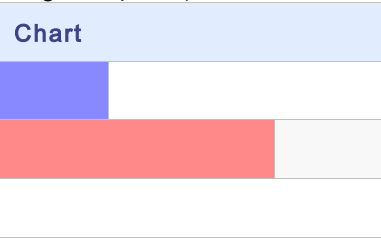
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canceled its carbon-offset program, saying it was not helping to reduce global emissions, and might even encourage some people to travel more.²

- 1) “British public refuse to fly less to reduce their carbon footprint” The Guardian, October 5, 2009
- 2) “Paying More for Flights Eases Guilt, Not Emissions” New York Times, November 17, 2009

LEISURE 19: Did you make a purchase from a travel agent in the past 12 months?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes |  | 28.1% | 229 |
| No | | 71.9% | 585 |
| Not Answered | | | 5 |
| | | Valid Responses | 814 |
| | | Total Responses | 819 |

2010 update: Well under a third of respondents had made a travel purchase from a travel agent in the last 12 months. However, that did represent a jump of almost 6% from respondents in the 2009 survey.

According to a study by Forrester Research, the number of U.S. leisure travelers using the Internet to book travel declined from 53 percent in 2007 to 46 percent in 2009. The report indicated that difficult site navigation and presentation on travel company sites and hotel and airline sites caused a growing number of travelers to shift away from self-service on the Internet and to come back to traditional travel agents.

"People are saying 'I don't understand my options, and I would like to talk to someone who can do all the searching and tell me what's available,' " Henry Hartevelt, the chief Forrester analyst behind the study told CNN. "Major travel agencies have absolutely failed in their responsibility to innovate and think of creative new ways to help their customers shop."

CNN interviewed a 27 year-old restaurant manager named Darin Kaplan, who uses the Internet for many of his other purchases, said, "It's a cut-and-paste experience when you're booking online. None of these sites are going to tell me what I can do with different options. Travel agents know what they are talking about. It's more comforting to hand my money to someone who has the knowledge and experience."¹

Travel agents have generally been able to survive by moving out of direct competition with the Travelocitys and Expedias of the world, serving more of a niche role — servicing institutions with frequent, volume travel needs, catering to the refined travel menus of consumers at the upper end of the market, or specializing in niche markets by region or special interest. A recent Amadeus travel marketing poll identified adventure travel (83%), religious travel (55%), and weddings (45%) as the main growth areas for specialist agents booking holidays.² Agents specializing in the LGBT travel market have also continued to do well, as have those who put together adventure, wildlife, and/or cultural vacations.

As discerning eco-travelers travel to more developing economies, the customer service and



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human interaction offered by a traditional travel agent will hold value for a significant percentage of travelers for the foreseeable future.






1) CNN.com, "Are travel agents making a comeback?" August 12, 2009

2) travelmole.com, "Travel Technology" November 19 2009

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LEISURE 20: Were you (or would you be) more likely to use the services of a travel agent educated in green travel, e.g. ASTA's Green Program?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| No, I don't use the services of travel agents |  | 26.1% | 212 |
| Yes |  | 22.9% | 186 |
| No, I was not aware of it, but it would favorably influence my choice of travel agents |  | 20.5% | 166 |
| No, I was not aware of it, and it's unlikely to be an influence |  | 15.8% | 128 |
| Although I don't use travel agents now, I would if the agent was a "green" expert |  | 14.7% | 119 |
| Not Answered | | | 8 |
| | | Valid Responses | 811 |
| | | Total Responses | 819 |

2010 update: The idea of “green travel agents” holds appeal for the eco-travelers who responded. 58.1% of respondents said that they would be inclined to use the services of a travel agent trained by a certification body like ASTA to offer sustainable travel choices, up slightly from last year. Significantly, at least 36% of respondents were not aware of such programs — down from 42.3% last year — suggesting that while marketing remains the primary challenge for ASTA and other sustainable travel agent certification programs, they are succeeding in creating brand awareness among their primary markets.

More than 45% of respondents said that they did not use travel agents, and/or that programs like ASTA’s would *not* motivate them to use green-certified travel agents.

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LEISURE 21: Does the availability of volunteer opportunities have an influence when choosing your vacation destination?

| | 1 (Encourages) | 2 | 3 (Neutral) | 4 | 5 (Discourages) | Total | Mean |
|---------------------|-------------------|--------------|--------------|-------------|--------------------|---------------|-------|
| Degree of Influence | 13.2% | 21.1% | 61.6% | 3.0% | 1.1% | 100.0% | 2.577 |
| Total | 13.2% | 21.1% | 61.6% | 3.0% | 1.1% | | N/A |

This chart suggests that the availability of volunteer opportunities was a somewhat important factor in making choices about vacation destinations.




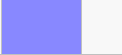

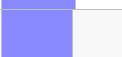


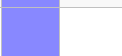



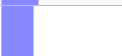

As seen in the table above, 34.2% of respondents indicated that the availability of volunteer activity encouraged their selection of a vacation destination, a slight decline from 2009.

Some individuals find volunteer opportunities a significant influence in choosing a travel destination, whereas others may not find them influential at all.

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LEISURE 22: Which of these websites, if any, have you visited to find out about volunteering?

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|--------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| NONE OF THE ABOVE |  | 35.3% | 289 |
| Habitat for Humanity |  | 24.7% | 202 |
| Gap Adventures |  | 16.7% | 137 |
| Earthwatch |  | 14.0% | 115 |
| Local volunteer center website |  | 12.6% | 103 |
| Craigslist.org |  | 11.7% | 96 |
| Other |  | 9.0% | 74 |
| VolunteerMatch.org |  | 8.4% | 69 |
| Idealist.org |  | 8.1% | 66 |
| WWOOF.org |  | 5.4% | 44 |
| HandsOnNetwork.org |  | 2.9% | 24 |
| Volunteersolutions.org |  | 2.4% | 20 |
| 1-800-volunteer.org |  | 1.6% | 13 |
| WiserEarth.org |  | 1.3% | 11 |
| | | Valid Responses | 819 |
| | | Total Responses | 819 |

2010 update: Of the websites we asked respondents about, Habitat for Humanity — new to this year’s study — was the most popular for respondents interested in volunteer activities (89% of the respondents to this survey — up dramatically from roughly half). Gap Adventures, also new to this year’s study [and a survey announcement distribution partner this year], was second.

LEISURE 23: Which of these causes would motivate you to participate in volunteer travel? Rank your top motivators.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Total |
|------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|
| Economic development | 4.8% | 7.4% | 10.0% | 11.6% | 8.1% | 11.8% | 9.8% | 13.6% | 21.1% | 8.1% |
| Environmental | 19.1% | 25.4% | 17.1% | 15.4% | 12.2% | 9.2% | 7.8% | 4.5% | 5.3% | 18.5% |
| Teaching/mentoring | 16.2% | 12.5% | 14.3% | 10.9% | 12.2% | 22.4% | 21.6% | 9.1% | 5.3% | 14.0% |
| Hunger related | 4.6% | 5.3% | 6.8% | 9.4% | 12.8% | 18.4% | 5.9% | 13.6% | 10.5% | 6.9% |
| Natural disaster relief (e.g., hurricane, earthquake, etc) | 19.6% | 13.8% | 12.8% | 12.4% | 10.1% | 11.8% | 3.9% | 9.1% | 2.6% | 14.4% |
| Industrial disaster cleanup (e.g., oil spill) | 4.4% | 6.5% | 6.6% | 10.1% | 12.8% | 13.2% | 7.8% | 13.6% | 15.8% | 7.1% |
| Human rights | 10.8% | 10.4% | 11.8% | 14.6% | 12.2% | 7.9% | 11.8% | 9.1% | 2.6% | 11.2% |
| Animal concerns | 14.3% | 12.0% | 13.0% | 5.6% | 11.5% | 1.3% | 9.8% | 18.2% | 7.9% | 11.9% |
| Scientific pursuits | 6.3% | 6.9% | 7.7% | 10.1% | 8.1% | 3.9% | 21.6% | 9.1% | 28.9% | 7.9% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | |

2010 update: The earthquake in Haiti was one of several major natural disasters around the globe in 2009-2010 that made natural disaster relief the most frequent #1 choice among respondents — up from #4 last year. Environmental causes, last year’s leading cause, was almost as strong a motivator for volunteer travel, leading socially-oriented volunteer activities such as teaching and mentoring, human rights, and hunger relief. A new category in this year’s question was *Industrial disaster cleanup* — a strong choice for many respondents in light of the recent Deepwater Horizon spill that, though now capped, will continue to threaten wildlife in the Gulf region for years to come.

Other studies, such as “Volunteer Travel Insights 2009,” produced by GeckoGo, have shown roughly similar results. However, “Volunteer Travel Insights 2009” broke the responses down by gender, and showed that females were more interested in humanitarian work and teaching, and males more interested in environmental/conservation projects.¹

1) “Volunteer Travel Insights 2009” GeckoGo.com ©2009

HOTEL STAYS

HOTEL 1: When making a hotel reservation, what are the top five motivators that make you choose one hotel over another? Please rank up to five.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|------------------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| The hotel's environmental program | 3.1% | 4.5% | 6.2% | 6.8% | 8.3% | 7.3% | 13.9% | 4.0% | 11.1% | 0.0% |
| Free Internet in room | 2.6% | 3.7% | 6.1% | 6.3% | 8.3% | 11.0% | 13.9% | 4.0% | 0.0% | 0.0% |
| Advertising in green / alternative media | 0.8% | 1.2% | 1.5% | 3.2% | 3.6% | 1.2% | 0.0% | 0.0% | 11.1% | 14.3% |
| Location near attractions | 8.5% | 9.2% | 9.8% | 8.0% | 7.2% | 2.4% | 16.7% | 12.0% | 0.0% | 14.3% |
| Brand or hotel's reputation | 4.3% | 7.1% | 7.7% | 9.3% | 10.4% | 7.3% | 2.8% | 12.0% | 0.0% | 0.0% |
| Certification as a green property | 2.6% | 2.7% | 2.5% | 5.2% | 4.5% | 3.7% | 2.8% | 4.0% | 22.2% | 7.1% |
| Online review of property | 6.3% | 9.3% | 13.0% | 12.9% | 10.8% | 7.3% | 2.8% | 8.0% | 5.6% | 7.1% |
| Price or special offers | 25.8% | 21.4% | 15.5% | 10.2% | 9.5% | 9.8% | 2.8% | 8.0% | 0.0% | 7.1% |
| Pool | 1.5% | 1.6% | 2.8% | 2.7% | 4.5% | 4.9% | 2.8% | 12.0% | 11.1% | 0.0% |
| Fitness facilities | 0.5% | 1.8% | 1.6% | 2.9% | 3.2% | 2.4% | 16.7% | 0.0% | 11.1% | 0.0% |
| Quality | 9.1% | 11.2% | 10.7% | 10.9% | 7.9% | 7.3% | 5.6% | 12.0% | 5.6% | 14.3% |
| Reward program / points | 2.6% | 4.0% | 3.8% | 6.3% | 5.2% | 6.1% | 2.8% | 4.0% | 5.6% | 0.0% |
| Green / sustainable dining options on premises | 2.0% | 4.4% | 3.3% | 3.0% | 5.4% | 11.0% | 8.3% | 8.0% | 11.1% | 14.3% |

| | | | | | | | | | | |
|----------------------------------------------|--------------|-------|-------|------|------|------|------|------|------|--------------|
| Location | 26.9% | 15.2% | 11.8% | 9.6% | 6.3% | 8.5% | 2.8% | 4.0% | 0.0% | 7.1% |
| Has earned a "green practices" certification | 3.5% | 2.5% | 3.7% | 2.9% | 5.0% | 9.8% | 5.6% | 8.0% | 5.6% | 14.3% |

Traditional criteria were the most important for respondents in selecting a hotel. *Price* is by far the most important factor, no surprise in the current economic atmosphere, followed by location, quality and reputation. Less than a quarter of responses indicated that a hotel’s environmental practices were primary motivators in selecting it. Of those practices, the most important was the hotel’s general environmental program. Sustainable dining options were a factor for some respondents, but not as important as a hotel’s rewards program.

2010 update: Significantly more respondents indicated that a hotel’s environmental practices were primary motivators than last year, however — almost 29% cited environmental practices as a “top five” criterion, compared to only 22% in 2009. That is in line with 29% of respondents from the general public said in a recent Samsung Electronics study in Europe that they would choose an “eco-friendly” hotel if were offered by a popular travel booking site.¹

The substantial number of travelers seeking more environmentally responsible hotel and resort accommodation has prompted leading chains to accelerate sustainable business models in the operation and construction of their units. Marriott International recently announced that it will expand its green hotel portfolio ten-fold over the next five years by introducing a green hotel prototype with LEED® (Leadership in Energy and Environmental Design) certification. **Interestingly, the number of respondents in our study who picked a hotel’s green property certification as a top five motivator rose by almost 5%, from 12.9% to 17.5%.**

For most respondents, price seems to trump sustainability when it comes to choosing hotels. A recent Medill report, prepared by Northwestern University, indicated that being the leader in environmentally friendly hotels had not translated into more convention business for the city of Chicago. Chicago now offers more hotels certified by Green Seal, an independent certification of environmental practices, than any other city in the nation. Yet the city continues to lose conventions to competing convention host cities like Las Vegas and Orlando.²

1) travelmole.com, “Hotel” November 3, 2009
 “Going green doesn’t equal making green” Medill Reports

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HOTEL 2: What hotel environmental initiatives are most important to you? (Rank up to five.)

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--------------------------------------------------------------------------------|-------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Built with eco-friendly materials | 6.4% | 5.8% | 5.6% | 6.4% | 6.3% | 5.3% | 6.5% | 12.1% | 17.6% | 7.1% |
| Eco-friendly furnishings | 2.5% | 3.2% | 3.1% | 3.6% | 5.0% | 7.4% | 4.3% | 12.1% | 23.5% | 21.4% |
| Carbon reduction or offsets of guest travel | 1.0% | 0.9% | 0.9% | 1.3% | 1.3% | 5.3% | 0.0% | 0.0% | 0.0% | 14.3% |
| Carbon reduction or offsets of hotel stay | 1.7% | 0.9% | 1.6% | 1.3% | 1.5% | 0.0% | 2.2% | 12.1% | 0.0% | 14.3% |
| Energy efficiency | 14.7% | 12.9% | 14.2% | 14.1% | 9.6% | 15.8% | 6.5% | 0.0% | 0.0% | 7.1% |
| Water efficiency | 7.5% | 12.3% | 15.0% | 13.0% | 10.7% | 8.4% | 17.4% | 0.0% | 5.9% | 0.0% |
| Recycling | 15.0% | 15.3% | 12.9% | 15.5% | 15.1% | 11.6% | 13.0% | 3.0% | 0.0% | 0.0% |
| Indoor air quality | 8.8% | 6.7% | 5.5% | 5.4% | 4.4% | 5.3% | 2.2% | 9.1% | 11.8% | 7.1% |
| Non-toxic cleaning chemicals | 8.2% | 9.6% | 9.0% | 8.0% | 10.3% | 14.7% | 17.4% | 15.2% | 17.6% | 14.3% |
| Provides soap and shampoo in dispensers (rather than small disposable bottles) | 2.6% | 4.2% | 4.7% | 3.4% | 7.3% | 6.3% | 8.7% | 18.2% | 0.0% | 7.1% |
| Energy controls to reduce heating/cooling when rooms are unoccupied | 9.5% | 10.4% | 10.7% | 12.9% | 12.6% | 6.3% | 6.5% | 3.0% | 5.9% | 0.0% |
| Involvement in | 4.6% | 3.6% | 5.1% | 4.3% | 7.3% | 8.4% | 10.9% | 9.1% | 11.8% | 0.0% |

| | | | | | | | | | | |
|-----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| local environmental efforts | | | | | | | | | | |
| Option to re-use sheets or towels | 17.5% | 14.3% | 11.7% | 10.9% | 8.8% | 5.3% | 4.3% | 6.1% | 5.9% | 7.1% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

When it comes to sustainable initiatives in a hotel, resource conservation is important to respondents. Recycling, energy and water use are the three practices that they most look for in a hotel’s green operations. Also important were materials and atmospheric conditions that guests come in contact with: non-toxic cleaning materials were cited as a top-5 choice by over 45% of responses.

Hotels seem to be listening. In the American Hotel & Lodging Association’s (AH&LA) 2008 Green Assessment Survey, nearly half (43.4%) of the responding properties had smart energy controls in rooms — programmable on/off timers or sensors used for lighting in low traffic/occupancy, (though only 16% use occupancy sensor control for guestroom thermostats). 82.3% of properties trained their maintenance staff on conservation and energy procedures. Significantly, hotels mentioned that they put green practices in place as much for building guest loyalty as for the environmental benefits.¹ It has been a good investment for hotels, either way. J.D. Powers and Associates 2009 North America Hotel Guest Satisfaction Index Study showed that awareness of green programs had a strong impact on overall guest satisfaction. Satisfaction was more than 160 points higher among guests who report being aware of their hotel’s green programs, compared with guests who are unaware of them.²

When it comes to branding, sustainability is emerging as a top-to-bottom identity for hotels. Designer Alexis Readinger of the Los Angeles design firm Preen has seen a change in what her hospitality clients are looking for. Expectations are changing, she says, when it comes to “green” design. Green has become a defined aesthetic that goes well beyond installing bamboo floors.




Charles de Lisle the Charles de Lisle Workshop in San Francisco has seen the changes, and agrees. ”If you’re not paying attention then you’re not going to be in business,” he said.³

1) “AH&LA Survey Identifies Hotels' Top Green Initiatives and Challenges” at hotelnewsresource.com
 2) “Good to Know: Report Shows Guests Prefer Green” July 29, 2009 at ecogreenhotel.com
 3) “Design Redux: Tighter budgets and changing guest needs are the new reality for interior designers” Beth Kormanlik, *Travel & Leisure*

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HOTEL 3: When provided with the option to participate in a hotel’s green programming (in-room recycling, less-frequent sheet and towel exchange, etc.), how likely are you to participate?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|-----------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Very likely |  | 89.5% | 697 |
| Somewhat likely |  | 9.5% | 74 |
| Unlikely |  | 1.0% | 8 |
| Not Answered | | | 11 |
| | | Valid Responses | 779 |
| | | Total Responses | 790 |

Convenience is a strong motivator — almost every respondent said that he or she would participate in a green programming option, at least sometimes, if it were provided (with almost 90% saying they would be very likely to participate). Other studies show that as hotel guests, they are participating. In fact, in J.D. Powers and Associates 2009 North America Hotel Guest Satisfaction Index Study, 72 percent of 66,000 guests questioned who were aware of their hotels’ conservation programs said they participated in them during their stay: For example, recycling or participating in the property’s linen reuse program.¹ According to the Green Hotels Association, their towel and sheet re-use program has been in place in some properties since 1993, and many properties report 70% to 90% guest participation.

In one example, over 3,000 guests participated in the “Make A Green Choice” pilot program at the Sheraton Seattle and saved 126,000 gallons of water in two months, in addition to decreasing energy and chemical consumption. Sheraton Seattle reported that the program directly contributed to increased bookings. Sheraton Seattle was able to reduce their energy index by more than 20% in 2008 as a result of “Make A Green Choice” and other eco-friendly initiatives. The property was also able to recycle over or 12 tons of materials per month.³

As Helen Hatch, a principal with hotel architectural firm Thompson, Ventulett, Stainback & Associates, said, “[W]e are close to a tipping point in sustainable design and I think hotel guests will really want the hotels where they stay to be sustainable-designed, built and managed. It won’t take long. Once it happens, you will see a tremendous change in the industry.”⁴

1) “Good to Know: Report Shows Guests Prefer Green” July 29, 2009 at ecogreenhotel.com

2) Press release, Green Hotels Association, September 25, 2002




3) “Starwood Unveils Green Guest Opt-In Program” Hotels Magazine, July 28, 2009

4) “Hotels Find it is Time to Go Green” Globe St.com, March 10, 2008

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HOTEL 3a: True or False? When shopping for a hotel, a green rating would influence my purchase:

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|-----------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| True, if the hotel prices are the same |  | 66.4% | 511 |
| True, even if the prices aren't the same |  | 25.2% | 194 |
| False, a green rating doesn't influence my decision |  | 8.3% | 64 |
| Not Answered | | | 11 |
| | | Valid Responses | 769 |
| | | Total Responses | 780 |

New question for 2010: Are green ratings an influence in eco-travel purchase decisions? The answer: A resounding *yes*. 91.6% of respondents said that it was an influence — although only a quarter of respondents said that it would be an influence even if there were a price premium on the green-rated hotel. The responses were in line with other responses indicating that traditional hotel selection criteria, such as price, are more important than a green rating.

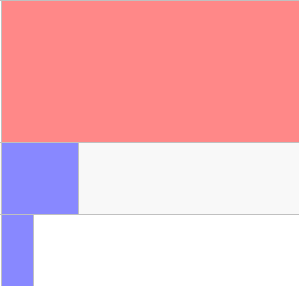
A recent Canadian survey of the general travel market showed increasing awareness of environmental issues among hotel guests. Yet while 51% of leisure travelers indicated environmental issues were important to them, only 22% placed importance on a green rating — half as many as said that a hotel's (advertised or observed) were important.¹

1) Terracurve.com, "Canadian hotels have the right idea: Green is the way to go" March 4th, 2010

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HOTEL 3b: When you are shopping and booking travel choices do you believe that travel providers should...

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Provide a clear way to distinguish between "green" and non-green travel choices |  | 75.6% | 576 |
| Provide only suggestions on ways to travel "greener" | | 18.2% | 139 |
| Focus only on providing the best price | | 6.2% | 47 |
| Not Answered | | | 18 |
| | | Valid Responses | 762 |
| | | Total Responses | 780 |

New question for 2010: The eco-travelers who responded to this survey look to travel providers to not only offer green travel choices, but to help travel consumers make more environmentally conscious decisions. In response to this question — new to this year's survey — more than ¾ of respondents wanted providers to help them tell which travel choices were really green.








Recent research by the European Commission studying the general population showed that two-thirds of consumers find it difficult to understand which products are better for the environment. However, the same study showed that only 20% of Europeans believe companies are doing enough to promote environmentally friendly options, and 58% think that many companies are "pretending" to be green in order to charge higher prices. "Industry has a long way to go in helping consumers feel confident when making green choices," wrote Meglena Kuneva, European Commissioner for Consumer Affairs.¹

1) The Guardian (UK), "Consumers want to make green choices" November 29, 2009

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HOTEL 4: In the past 12 months, where did “green” fall on your list of priorities when selecting a hotel, if other factors were equal? Mark all that apply:

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| More important than brand |  | 38.5% | 304 |
| Least important priority |  | 30.5% | 241 |
| More important than star rating |  | 28.4% | 224 |
| More important than price |  | 8.1% | 64 |
| Most important priority |  | 7.0% | 55 |
| More important than location |  | 6.7% | 53 |
| I didn't stay in a hotel in the past year |  | 3.5% | 28 |
| | | Valid Responses | 790 |
| | | Total Responses | 790 |

Respondents were divided on the importance of “green” programs and credentials when selecting a hotel. For almost 40%, “green” is more important than brand. And almost 30% said that “green” is more important than a hotel’s star rating.

“[I]t is no longer about just operating your lodging facility as you once did,” wrote environmental trend watcher Colette Chandler. “You are now being judged by a group of people who want to maintain their healthy, green lifestyle while traveling. They want to stay at environmentally friendly facilities and ones that recognize the connection between green and health. Ones that offer healthier eating options, serve organic and/or local cuisine, use environmentally friendly cleaning products and talk about what they are doing to conserve natural resources.”¹







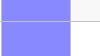
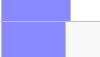
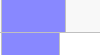
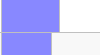
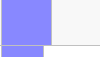

That said, an equal number of respondents said it was their least important priority (only 5.6% said a hotel’s sustainability program was their most important priority, in fact). Traditional hotel selection criteria like price and location were more important than a hotel’s green status for over 90% of respondents. This question is closely related to question 30, which showed that more than three times as many respondents were likely to be interested in price and location than in the environmental impact their hotel is making.

1) “Understanding the Consumer Driving Green Trends” Collette Chandler, 4Hoteliers.com, June 25, 2008

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HOTEL 5: In the past 12 months, what resources did you use to determine if a hotel was green? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|----------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Hotel's own website |  | 51.3% | 405 |
| Travel website |  | 29.4% | 232 |
| NONE OF THE ABOVE |  | 25.7% | 203 |
| Hotel's print or internet ad indicating green initiative |  | 24.4% | 193 |
| Word of mouth |  | 14.4% | 114 |
| Magazine and newspaper articles |  | 12.7% | 100 |
| Guidebook |  | 12.3% | 97 |
| Environmental group (website, etc.) |  | 11.4% | 90 |
| Third-party certifier |  | 10.0% | 79 |
| Social networking sites (e.g., Facebook) |  | 7.6% | 60 |
| Online travel agent, or local retail travel agent |  | 5.8% | 46 |
| Other |  | 2.7% | 21 |
| | | Valid Responses | 790 |
| | | Total Responses | 790 |

2010 update: 29% of respondents cited third-party travel websites as a resource to evaluate a hotel's green "cred" this year, a 7% jump over last year's study. Advertising remained an important marketing tool — nearly a quarter of respondents indicated that they had taken a green hotel's into account in assessing its environmental sustainability. For the first time, this year's survey asked respondents if they had used Facebook and other social networking sites as a resource, and 7.6% said that they had. We will begin tracking this to observe if that number increases with social media driving more and more purchasing decisions.

To reach eco-conscious guests, a hotel's own marketing materials are important. As we can see in this chart, well over half of respondents used the hotel's website and advertising to determine whether a hotel was "green." Hotels wishing to reach environmentally conscious guests and event planners need to prioritize green programs, features and credentials on their website. Many successful green-branded hotel sites have adopted a "green style" in their site design: the color



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green, in fact, is favored by designers for hotel websites to convey a natural and refreshing experience.¹ Players in the green hotel market are using a “green-aware” web marketing strategy to reach eco-conscious guests, with a different online experience for those reaching them from a search for green hotels. The website for Salt Lake City’s Peery Hotel greets customers linking from a Google search for “green hotel” with an image of the earth, reflected in a dewdrop on a green leaf. Customers linking from any other search term see an image of the Peery’s downtown location.

1) “Checking in Hotel Web Design: 50 Cozy Hotel Websites and Trends” onextrapixel.com, November 21, 2009

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HOTEL 6: How much do you trust the source or sources you indicated above? (If you did not use any resources, please skip this question.)

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| I believe my source(s) claims to be truthful |  | 46.6% | 299 |
| I tend to be dubious, so I need to check as many sources as possible, just to be sure |  | 37.8% | 242 |
| I'm skeptical of all green claims |  | 15.6% | 100 |
| Not Answered | | | 149 |
| | | Valid Responses | 641 |
| | | Total Responses | 790 |

2010 update: this year's respondents were significantly more trusting than the eco-aware travelers were in 2009. The percentage of respondents who trusted the sources they used *doubled* to 46%. Nonetheless, over 53% of respondents were “dubious” or “skeptical” or green claims. Respondents to a recent survey by industry research group PhoCusWright found even less credibility — 56% were skeptical about what travel companies had to say about their green practices.¹

Travelers choosing green hotels are like other environmentally conscious consumers, wary of “greenwashing” claims that mask generally *unsustainable* practices. Participants at the Sustainable Brands '09 conference were asked to rate businesses for trustworthiness alongside environmental groups, NGOs and other third parties, and the federal government. Retailers and manufacturers came in dead last.²

1) “Consumers Skeptical of Green Travel Claims” Sustainable Life Media, March 29, 2009

2) “Whom Do You Trust to Make Green Marketing Claims?” Jacquelyn A. Ottman, Sustainable Life Media, Summer 2009



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HOTEL 7: Please name the “green” travel or hospitality certifications that you are aware of. If you do not know of any, just skip the question. (Certification #1)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|----------------------------------|-------|------------------------|------------|
| | | 85.8% | 678 |
| Green Globe | | 1.8% | 14 |
| Green Key | | 0.5% | 4 |
| green leaf | | 0.3% | 2 |
| green seal | | 0.5% | 4 |
| LEED | | 2.7% | 21 |
| LEED certification | | 0.3% | 2 |
| LEEDS | | 0.6% | 5 |
| Rainforest Alliance | | 0.3% | 2 |
| STEP | | 0.8% | 6 |
| Sustainable Travel International | | 0.3% | 2 |
| <i>Other Responses</i> | | 6.3% | 50 |
| | | Valid Responses | 790 |
| | | Total Responses | 790 |



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HOTEL 7: Please name the “green” travel or hospitality certifications that you are aware of. If you do not know of any, just skip the question. (Certification #2)






(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------|------------------------|------------|
| | | 91.9% | 726 |
| Green Globe | | 1.0% | 8 |
| Green Key | | 0.5% | 4 |
| Green Seal | | 0.9% | 7 |
| GreenGlobe | | 0.3% | 2 |
| leed | | 0.6% | 5 |
| <i>Other Responses</i> | | 4.8% | 38 |
| | | Valid Responses | 790 |
| | | Total Responses | 790 |

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HOTEL 7: Please name the “green” travel or hospitality certifications that you are aware of. If you do not know of any, just skip the question. (Certification #3)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| |  | 94.1% | 743 |
| Green Globe |  | 0.3% | 2 |
| Green Seal |  | 0.6% | 5 |
| LEED |  | 0.5% | 4 |
| <i>Other Responses</i> |  | 4.6% | 36 |
| | | Valid Responses | 790 |
| | | Total Responses | 790 |

Respondents were presented with three blank boxes in which to write in the certification brands they recall. The largest number is a blank. This indicates virtually no “brand recall” among even the greenest of travelers: On average, 90% of respondents did not answer the question because they were not aware of *any* green travel or hospitality certifications. The lack of familiarity with green travel and hospitality certifications reflects the absence of a trusted, recognizable source of independent reviews in the sector.

“Remember, there is a reason AAA ratings, Energy Star certified, and certified organic food labels exist,” said travel writer Peter Davis Krahenbuhl, co-founder of Sustainable Travelers International. “People respect what they stand for.”¹ The recognition and trust of a certification like the Underwriters Laboratories “UL” mark takes time to achieve.

As Glenn Hasek, publisher and editor of *Green Lodging News* says of the hospitality industry, “Excellent programs such as the U.S. Green Building Council’s LEED (not originally designed for hotels), the EPA’s Energy Star, and Green Seal’s rating program grow at a snail’s pace—each with their own positive agendas. A number of states also have their own programs—some thriving, some on life support... The certification dilemma will not be solved quickly. There are those that... argue for a national certification program that includes a mandatory on-site audit, while others are willing to accept a program similar to Canada’s that offers more of a self-certifying model.”²

2010 update: The Green Key Eco-Rating system, developed in 1997 for the Hotel Association of Canada, has more than 1,200 member hotels including Accor’s 21 Canadian properties. The program entered the U.S. hotel market last September, and the state of Indiana said it would the Green Key Eco-Rating Program as its official statewide environmental initiative. New York,



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Oklahoma, South Carolina, and Maryland were some of the other states launching different green lodging certification programs.

Whitbread, a UK hotel and restaurant group named one of the 100 most sustainable corporations by Corporate Knights and Innovest Strategic Value Advisors in 2009, has a corporate sustainability program called Good Together. Fairmont hotels are receiving LEED certification, Marriott International also launched a partnership with the World Environment Center (WEC) for its Costa Rican suppliers.³

Some industry leaders are questioning whether the profusion of green certification systems is good for green travel. “While I think it would be good to have a green rating system for hotels, I think there should be one standard that all hotels abide by, to avoid confusion,” writes Casey Clinton in a *Wisconsin Builder* blog. “As it stands, there already are several systems in play: Leadership in Energy and Environmental Design (LEED), Green Seal, the Green Tourism Business Scheme and Canada’s Green Key program, which Accor is attempting to bring to the United States.

“With all the different systems, it’s actually harder to find an environmentally friendly hotel, because without a set standard one could end up at a hotel that’s rated green by more superficial standards (points for bamboo sheets or recycled menus, for instance) instead of a hotel that features sustainable systems such as a gray water system or geothermal heating.

“Until a universal system is recognized, be careful when choosing a green hotel. It could easily be less environmentally friendly than you think.”⁴

The green travel industry is still very much emerging. Because there is no general agreement on precisely what green travel means, there is no one internationally accepted accreditation body, verifying and enforcing standards and giving travelers an opportunity to assess the sheer variety of certifications they must contend with. At present, there are over 350 independent eco-labels connected with the travel industry. Most of them are a “checklist” for travel suppliers, rather than a searchable tool for travelers. And meeting environmental standards does not guarantee the traveler standards of quality.⁵

- 1) “Eco-Certification in the Travel and Tourism Industry” SustainableTravelInternational.org
- 2) “Random Thoughts on Green Hotel Certification” *Glenn Hasek Green Lodging News*, September 10 2008
- 3) “As Green Hotels Proliferate, So Do Eco-Rating Systems” *Environmental Leader*, January 19, 2010
- 4) “Green rating systems: When is enough enough?” *Wisconsin Builder*, January 21, 2010
- 3) “Stamp of approval” Richard Hammond *The Guardian (UK)*, March 28, 2007

MOTIVATIONS AND ADVERTISING

MOTIVATIONS 1: In advertising, which of the following terms are the most meaningful and motivating to you? Rank up to five top choices.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
|-----------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Sustainable | 23.4% | 13.1% | 16.9% | 9.7% | 11.0% | 5.9% | 17.6% | 0.0% | 0.0% | 16.7% | 0.0% |
| Fair trade | 9.5% | 12.7% | 10.9% | 10.3% | 9.5% | 5.9% | 11.8% | 0.0% | 12.5% | 16.7% | 0.0% |
| The word "green" | 3.3% | 3.1% | 5.4% | 5.6% | 6.6% | 14.7% | 0.0% | 0.0% | 0.0% | 16.7% | 16.7% |
| Socially responsible | 14.3% | 13.6% | 12.1% | 14.4% | 11.6% | 5.9% | 5.9% | 14.3% | 12.5% | 0.0% | 0.0% |
| The color green | 1.5% | 0.9% | 0.7% | 2.0% | 1.7% | 0.0% | 11.8% | 0.0% | 12.5% | 0.0% | 0.0% |
| Eco | 4.3% | 7.4% | 5.3% | 6.5% | 5.8% | 2.9% | 5.9% | 14.3% | 12.5% | 0.0% | 0.0% |
| Carbon neutral | 3.4% | 5.3% | 6.7% | 5.6% | 9.0% | 17.6% | 0.0% | 7.1% | 0.0% | 0.0% | 50.0% |
| Local | 10.4% | 11.0% | 11.6% | 9.0% | 9.2% | 5.9% | 5.9% | 14.3% | 0.0% | 16.7% | 0.0% |
| Ecological | 4.6% | 4.2% | 4.7% | 7.6% | 7.5% | 5.9% | 11.8% | 21.4% | 0.0% | 16.7% | 0.0% |
| Bio | 0.7% | 0.6% | 2.3% | 2.2% | 0.6% | 5.9% | 5.9% | 7.1% | 0.0% | 0.0% | 0.0% |
| Planet-friendly | 6.7% | 7.2% | 6.9% | 8.3% | 9.5% | 5.9% | 0.0% | 14.3% | 0.0% | 0.0% | 16.7% |
| Organic | 7.6% | 11.6% | 10.5% | 11.9% | 10.4% | 8.8% | 11.8% | 0.0% | 37.5% | 0.0% | 0.0% |
| Trees, leaves, grass, etc. (photo or graphic) | 6.1% | 4.7% | 3.0% | 4.7% | 5.2% | 2.9% | 0.0% | 7.1% | 12.5% | 16.7% | 16.7% |
| Planet Earth (photo or graphic) | 4.0% | 4.5% | 3.0% | 2.0% | 2.3% | 11.8% | 11.8% | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |



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New question for 2010: The five terms that most respondents' picked as top-five choices were *sustainable, socially responsible, organic, fair trade* and *local*. Descriptives or terms that were purely image-based such as the color green or a picture of the Earth did not rate as high, strongly suggesting that eco-travelers are a media-savvy group who look for substance and policy over hype when it comes to advertising.

A 2009 study suggests that consumers as a whole are skeptical about the current wave of green advertising. Havas Media, a unit of the Paris-based global marketing company Havas, conducted a market research study which showed that the “lack of connection between what companies are doing and how they are perceived...threatens to weaken relationships between brands and consumers.”

The study found that while consumers showed strong interest in buying goods and services from responsible sources, 64 percent of respondents viewed sustainability campaigns as a little more than a “marketing tool.”¹

1) “Study: For Consumers, Green Is Greenwash” *Green* blog, nytimes.com, April 30, 2009

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MOTIVATIONS 2: What are the primary drivers of your interest in green/sustainable travel options? Rank as many as apply.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | Total | Mean |
|------------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|-------|
| My health | 11.4% | 10.6% | 15.0% | 15.7% | 28.0% | 21.7% | 0.0% | 13.9% | 2.833 |
| My concern for the <u>global</u> environment | 37.2% | 29.3% | 19.0% | 10.9% | 7.6% | 4.3% | 0.0% | 24.9% | 1.923 |
| Supporting businesses that are demonstrating sustainable actions | 9.0% | 11.9% | 18.4% | 20.1% | 24.2% | 23.9% | 0.0% | 14.6% | 2.925 |
| Climate change | 13.8% | 16.9% | 15.8% | 19.8% | 16.6% | 21.7% | 0.0% | 16.1% | 2.602 |
| Everybody's doing it | 0.1% | 0.5% | 0.4% | 0.3% | 0.6% | 4.3% | 75.0% | 0.7% | 4.750 |
| My children's future | 10.3% | 10.6% | 12.5% | 14.3% | 10.2% | 17.4% | 12.5% | 11.5% | 2.617 |
| My concern for the <u>local</u> environment of the destination | 18.1% | 20.1% | 19.0% | 18.8% | 12.7% | 6.5% | 12.5% | 18.3% | 2.387 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | | N/A |

2010 update: Respondents' interest in green/sustainable travel is genuine and direct: A concern for the global environment was cited by nearly three times as many people as any other driver of an interest in green travel, followed by concern for the environment of their destination and climate change.

Respondents were also aware they were voting with their travel dollar — they chose the support of sustainability-oriented businesses in the travel industry as a secondary but strong concern. Only slightly fewer respondents were concerned about their own health, feeling that traveling greener is also traveling healthier.

Respondents indicated that sustainability wasn't simply a fad to them — “Everybody's doing it” was the clear last choice for ¾ of respondents as a factor in their green travel choices.

MOTIVATIONS 3: In general, how do you rank the “green” initiatives, practices and communications of these tourism and hospitality segments today?

| | Excellent | Fair | Neutral | Needs Work | Terrible | Don't know | Total | Mean |
|--------------------------|-------------|--------------|--------------|--------------|--------------|--------------|---------------|-------|
| Hotels | 5.2% | 30.9% | 15.6% | 35.5% | 4.9% | 8.0% | 100.0% | 3.281 |
| Car rental companies | 2.5% | 11.8% | 16.9% | 36.6% | 16.5% | 15.6% | 100.0% | 3.996 |
| Cruise lines | 2.7% | 9.2% | 12.8% | 21.5% | 23.8% | 30.0% | 100.0% | 4.446 |
| Airlines | 2.4% | 9.7% | 15.2% | 35.7% | 27.4% | 9.7% | 100.0% | 4.051 |
| All-inclusive resorts | 1.7% | 13.8% | 14.9% | 24.4% | 17.7% | 27.5% | 100.0% | 4.252 |
| Tour operators | 3.5% | 13.0% | 19.4% | 25.7% | 8.9% | 29.5% | 100.0% | 4.120 |
| Trains | 7.2% | 21.5% | 20.7% | 19.5% | 4.8% | 26.3% | 100.0% | 3.722 |
| Meetings and conventions | 2.5% | 11.2% | 18.6% | 30.9% | 14.1% | 22.6% | 100.0% | 4.107 |
| Total | 3.5% | 15.1% | 16.8% | 28.7% | 14.8% | 21.1% | | N/A |

Respondents did not always claim to be experts in the green travel industry, but they did not view it through rose-colored glasses, either. Most gave the hotel, car rental, airline and conventions/corporate events a “needs work” rating; car rental companies, cruise lines, airlines and meetings/conventions also received a substantial number of “terrible” votes. **2010 update:** On the whole, travelers gave slightly better grades to travel and hospitality segments than in 2009, with every hospitality segment except all-inclusive resorts receiving a slightly higher percentage of “excellent” ratings, and only all-inclusive resorts and tour operators receiving more “terrible” ratings. Hotels and trains fared best; while most respondents said they needed work, they were the only vendors receiving “fair” votes over 45%.

















The more experienced a green traveler, the more he or she knows about the green programs that suppliers offer. Green laundry, recycling and composting operations and low-energy lighting fixtures can be evaluated first hand.

Veteran eco-travelers can also spot the Johnny-come-lately to the sustainability market — United Airlines’ recent claims of reduced fuel consumption and carbon emissions are seen in the context of the airline’s past record of excess pollution, government fines and toxic leaks at maintenance facilities. Cruise lines are also establishing laudable environmental programs; but this is also within the context of the industry having been found guilty of environmental infractions and pollution in the past.

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MOTIVATIONS 4: Which resources (if any) did you use in the past 12 months order to gather information about “green” vacation options? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|---------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Internet search |  | 48.2% | 358 |
| Travel publications, guidebooks and/or websites |  | 39.7% | 295 |
| Green/environmental publications and/or websites |  | 29.6% | 220 |
| Word of mouth |  | 24.0% | 178 |
| None |  | 23.4% | 174 |
| Email newsletters |  | 22.9% | 170 |
| Tourism office or visitor bureau publications and/or websites |  | 21.8% | 162 |
| News articles |  | 20.9% | 155 |
| Friends / family |  | 19.2% | 143 |
| Local newspaper/travel section |  | 16.4% | 122 |
| Facebook or other social networking |  | 12.4% | 92 |
| Travel agent |  | 6.3% | 47 |
| TV advertisements |  | 3.5% | 26 |
| Other |  | 2.0% | 15 |
| Radio advertisements |  | 1.5% | 11 |
| Billboards |  | 1.3% | 10 |
| | | Valid Responses | 743 |
| | | Total Responses | 743 |

2010 update: Internet search-based travel research dropped more than 25% among survey respondents from last year. Taking its place were a combination of resources, most new to this year’s study: friends and family (cited by over 23% of respondents); Facebook and other social media (12.4%); travel agents (6.3%). A very popular new choice among respondents this year, however, was NONE, which could represent previous experience or popular culture, among many other possible sources.



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Travel publications and websites, along with travel publications and guidebooks, were used by 39.7% of respondents — a drop of almost 7%. Personal recommendations are always compelling — 39.7% of respondents said they had gathered information about green travel via word of mouth, which could include the trusted networks of social media, as well.

It is noteworthy that social media was twice as important a source of information as advertising, with only 5% saying they got information from TV and radio advertising, and less than 1.5% using information seen on billboards. In fact, only 21.4% of respondents used traditional media (print and broadcast) to gather information about green travel — a drop of 5% from 2009.

Respondents to this survey continued to be a largely self-directed and “wired” group — Internet searching was the most frequently-used method of gathering information about “green” vacation options. According to Google Trends, the Internet is now the top source for both business and leisure travel, used by 83% of all personal travelers and 77% of business travelers in a recent Google Trends report. “The Internet is used throughout the purchase funnel and is the most powerful tool in prompting people to actually book a trip,” the study said.¹

1) “Airline web sites battle it out for fewer customers” Christopher Hinton, MarketWatch.com, November 20, 2009

MOTIVATIONS 5: Which resources have influenced you in the past 12 months when planning your vacations (choosing a destination, tour, hotel, etc.).

| | Does Not Influence Me | Somewhat Influential | Very Influential | Total | Mean |
|-------------------------------------------------------------|-----------------------|----------------------|------------------|---------------|-------|
| Banner ads on environmental websites | 61.3% | 33.1% | 5.6% | 100.0% | 1.442 |
| Email newsletter broadcasts for environmental community | 38.1% | 53.0% | 8.9% | 100.0% | 1.708 |
| Ads in mainstream publications | 42.1% | 51.2% | 6.7% | 100.0% | 1.646 |
| Ads in environmental publications | 45.0% | 45.9% | 9.1% | 100.0% | 1.641 |
| Articles on mainstream websites | 28.3% | 60.2% | 11.6% | 100.0% | 1.833 |
| Articles on environmental websites | 32.5% | 51.2% | 16.3% | 100.0% | 1.838 |
| Tourism bureau's environmental-specific website or brochure | 37.6% | 49.4% | 12.9% | 100.0% | 1.753 |
| Articles in mainstream publications | 27.8% | 60.0% | 12.2% | 100.0% | 1.845 |
| Articles in environmental publications | 35.2% | 47.6% | 17.1% | 100.0% | 1.819 |
| Green travel directories or listings | 38.7% | 46.5% | 14.8% | 100.0% | 1.760 |
| Traveler reviews on websites and blogs | 16.1% | 55.7% | 28.2% | 100.0% | 2.121 |
| Word of mouth from friends | 15.4% | 43.8% | 40.9% | 100.0% | 2.255 |
| Sponsorship of green/environmental events or organizations | 34.7% | 52.3% | 13.0% | 100.0% | 1.783 |
| Total | 34.7% | 50.0% | 15.3% | | N/A |

Trust was most important in influencing respondents' travel decisions. As a group, respondents tended not to be strongly influenced by advertising in any media — digital, broadcast or print — even on environmentally-themed websites. A 2008 survey by Burst Media found that one in five adult web users seldom or never believe green claims, while two thirds say they only sometimes believe them — even though consumer recall of advertising with “green” messaging is quite high.¹



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Instead, more than 40% of respondents in this study were highly influenced by word of mouth from a trusted source — the word of mouth from friends.



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2010 update: The validity of Web 2.0 strategies — that peer reviews can be more powerful than corporate claims — was seen in the nearly 5% jump in the number of respondents who said that traveler reviews on websites and blogs were “very influential.” Blogs and articles were presumed to be unsponsored and unbiased, even though some travel blogs are written with the financial sponsorship of companies that want to see favorable reviews. [That fact is not always disclosed on the sites. Other bloggers post a positive travel review in for in-kind payment such as airfare, hotel rooms, cruise voyages and meals.]

As blogging expert Alexander Halavais of Quinnipiac University says, “Bloggers don’t have a standardized set of ethics. You might trust something you read in a magazine because you have faith in the news organization. But when it comes to blogs, the trust is often tied up with the person.”²

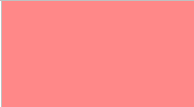


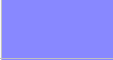




Interestingly, sponsorship of green/environmental events and organizations had a greater influence on respondents than advertising in environmental publications and websites.

- 1) “Green Advertising: Consumers Notice It, But Distrust It” Jessica Stillman, BNET1 blog, April 28th, 2008
- 2) “They’re changing the way travelers get information. Just take them with a grain of salt” “The Caveat” blog, NationalGeographic.com, February, 2008

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MOTIVATIONS 6: How do you determine that a travel supplier is truly “environmentally friendly,” for example, that they really do carbon offset, buy locally, use recycled materials, etc.?

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Reviews by other travelers (Lonely Planet, Trip Advisor, other) |  | 44.5% | 331 |
| 3rd party certifications and/or green labels (e.g. “Green Seal”) |  | 38.6% | 287 |
| Partnership with a nonprofit or government group |  | 27.7% | 206 |
| I don't attempt to verify claims |  | 25.3% | 188 |
| Information provided by the supplier |  | 23.4% | 174 |
| Family or friends |  | 20.6% | 153 |
| Social network commentaries or peer reviews online |  | 18.4% | 137 |
| Other |  | 2.0% | 15 |
| | | Valid Responses | 743 |
| | | Total Responses | 743 |

2010 update: Several criteria new to this year’s study helped respondents navigate multiple “green” claims from travel providers about their products and services. Respondents said they looked most frequently for 3rd party certifications like “Green Seal.” However, a majority of respondents indicated in other questions that they are not aware of *any* green travel certifications. Into the gap come Web 2.0 travel sites like LonelyPlanet.com and TripAdvisor.com, with reviews by peers. Combined with social networks, they validated claims of environmentally friendly travel services for 63% of respondents.

Partnership with non-profit groups or governments also gave respondents confidence in their green travel purchases.

Interestingly, fewer respondents relied on word of mouth from family or friends to determine the environmental friendliness of products and services than information provided by suppliers. The details of sustainable practices such as recycling, upcycling, carbon offsets, and sustainably sourced materials are often technical; the average, non-expert person (such as a friend or family member) is unlikely to have those facts at his or her command.



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This year's respondents were also asked if they attempted to verify green travel claims at all. More than 25% said they didn't.

The trusted AAA TourBook will now include an “eco” icon to designate “green” hotels. 2010 TourBook editions indicate properties that promote environmental and energy conservation as more commercial builders aim for green building standards for their hospitality properties. The “eco” option will also be included as an advanced search option in the hotels section of AAA's Web sites.

1) “2010 TourBooks Will Note Green Properties With ‘Eco’ Icon” *Green Lodging News*, July 7, 2009

MOTIVATIONS 7: Are you aware of the Global Sustainable Tourism Criteria set by The Global Partnership for Sustainable Tourism Criteria (GSTC Partnership)?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| No |  | 85.6% | 608 |
| Yes |  | 14.4% | 102 |
| Not Answered | | | 33 |
| | | Valid Responses | 710 |
| | | Total Responses | 743 |

The Partnership for Global Sustainable Tourism Criteria is a coalition of more than 50 organizations, founded in October 2008 by the Rainforest Alliance and several agencies of the United Nations — and merged with the Sustainable Tourism Stewardship Council (STSC) in September of 2009 to form the Tourism Sustainability Council (TSC). With so many reputable organizations behind it, the TSC may succeed in setting a recognized, minimum international standard for tourism businesses in protecting and sustaining the world’s natural and cultural resources, while ensuring that tourism meets its potential as a tool for poverty alleviation.

“Up to this point, the travel industry and tourists haven’t had a common framework,” said United Nations Foundation Founder and Chairman, Ted Turner.¹ The Rainforest Alliance’s executive director, Tensie Whelan, agrees. “There is mass confusion about what is sustainable tourism. This body will help to make this information available...and ensure that it is indeed reliable.”²

In June 2009, San Francisco became the first city in the U.S. to officially adopt the Global Sustainable Tourism Criteria, which was later supported by the U.S. Council of Mayors.




















1) “Ted Turner Announces First-Ever Global Sustainable Tourism Criteria at World Conservation Congress” Environmental News Network, October 7, 2008

2) “Global Sustainable Tourism Criteria Announced” WorldChanging

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MOTIVATIONS 8: Over the past year, which hotel brand has done the best job presenting itself as environmentally friendly? Base your answer on your experience of their green/sustainable-related outreach and communications, sponsorships, advertising, environmental practices, etc. If none, leave blank. **(Please write only one hotel brand name)**

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| |  | 75.9% | 564 |
| Best Western |  | 0.4% | 3 |
| Fairmont |  | 0.8% | 6 |
| Hilton |  | 2.3% | 17 |
| Holiday Inn |  | 0.7% | 5 |
| Hyatt |  | 0.8% | 6 |
| IHG |  | 0.3% | 2 |
| Joie de Vivre |  | 0.3% | 2 |
| Kimpton |  | 1.7% | 13 |
| Kimpton Hotels |  | 0.4% | 3 |
| Marriot |  | 0.3% | 2 |
| Marriott |  | 3.1% | 23 |
| radisson |  | 0.3% | 2 |
| Scandic |  | 0.4% | 3 |
| Sheraton |  | 0.5% | 4 |
| Starwood |  | 1.2% | 9 |
| Westin |  | 0.8% | 6 |
| Wyndham |  | 0.4% | 3 |
| <i>Other Responses</i> |  | 9.4% | 70 |
| | | Valid Responses | 743 |
| | | Total Responses | 743 |

2010 update: Among hotel brands, there is a significant opportunity to establish a “green” identity among eco-conscious travelers. Over 60% of respondents in this eco-conscious respondent pool were unable to name a single brand they associated with environmental friendliness. Only one chain, Marriott, registered more than a 4% response.

Emerging hotel brands and sub-brands may have the advantage of establishing “green” as their initial brand identity, rather than having to displace an old image. As hotel groups court a new generation of younger travelers, branding strategies revolve not only around trendy style, exciting locations and affordability, but on the properties’ environmental impact. Some businesses include environmental questions when selecting preferred lodgings for their traveling employees.

In 2006, Starwood Hotels and Resorts Worldwide introduced Element. Three years later, Element announced it would be the first brand built exclusively with properties certified by the U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) program. Element properties will feature carpet made from recycled products, use energy-efficient light bulbs and appliances, put recycling bins in its guest rooms and offer guests driving hybrid cars priority parking.

Hilton took the same approach in 2009 when it announced its Home2 Suites-branded properties. Each of the rooms in its hotels will include U.S. EPA WaterSense plumbing fixtures, bulk shower dispensers, dual-flush toilets, and recycled-content flooring.

As Barry Silverstein, co-author of *The Breakaway Brand*, wrote, “On the surface, these brands appear to be independent [from their major hotel-chain owners]. It seems as if the chains don’t particularly want travelers to know of their association with these different names; while the chains don’t exactly cover up that fact, they aren’t overt about it, either.”¹














On the whole, there is less attachment to brand among young and early middle-aged travelers who are more interested — among other things — in environmental-friendly programs that are substantive. “Loyalty could be dying in this industry,” says Jeff Weinstein, editor-in-chief of *Hotels* magazine, “especially among the Gen X and Gen Y consumers, who are fickle and not easily swayed by advertising. They are more naturally cynical and will drop you at a moment’s notice if you do not deliver on your promise.”²

1, 2) “Branding with No Reservations” Barry Silverstein, BrandChannel.com

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MOTIVATIONS 8: Over the past year, which destination has done the best job presenting itself as environmentally friendly? Base your answer on your experience of their green/sustainable-related outreach and communications, sponsorships, advertising, environmental practices, etc. If none, leave blank. **(Please write only one destination)**

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------------------------------------------------------------------------------------|-----------|-------|
| |  | 72.8% | 541 |
| Australia | | 0.3% | 2 |
| Bali | | 0.3% | 2 |
| Belize |  | 0.5% | 4 |
| Boulder, CO | | 0.3% | 2 |
| Colorado |  | 0.4% | 3 |
| Costa Rica |  | 4.6% | 34 |
| Ecuador |  | 0.4% | 3 |
| Florida |  | 0.4% | 3 |
| Germany |  | 0.4% | 3 |
| Hawaii |  | 1.2% | 9 |
| Kauai | | 0.3% | 2 |
| Las Vegas |  | 0.4% | 3 |
| Los Angeles | | 0.3% | 2 |
| Monterey, California | | 0.3% | 2 |
| New Zealand |  | 0.7% | 5 |
| Philadelphia | | 0.3% | 2 |
| Portland, OR |  | 1.7% | 12 |
| San Francisco |  | 0.4% | 3 |
| Switzerland | | 0.3% | 2 |
| <i>Other Responses</i> |  | 14.0% | 104 |

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For the second year in a row, Costa Rica was the only destination with significant brand awareness as an environmentally friendly destination among respondents (4.6%). The result is not surprising; national parks and reserves cover over 26% of Costa Rica, one of the most bio-diverse regions in the world, and the country has put significant resources into maintaining its natural heritage over the last 50+ years. Costa Rica's government is very conscious of its \$1.92-billion-a-year tourism industry, and that its natural heritage makes it the most visited nation in the Central American region; the country is not resting on its green laurels. Costa Rica now offers travelers the option of an offset program to make their trips there carbon-neutral. Called Climate Conscious Travel (CCT), the agreement — developed in part by Costa Rica's National Chamber of Ecotourism (CANAECO) — gets tourism businesses to assume responsibility of the industry's CO² production. CCT is part of Costa Rica's overall goal of becoming carbon neutral by 2021.

2010 update: The city of Portland, OR and the state of Hawaii were the only other destinations with an environmentally-friendly brand awareness over 1%. San Francisco, which last year was over 2%, fell to 0.4% this year, despite its Green Business Program, which grants certification to businesses meeting rigorous environmental standards, and was replaced as the #1 U.S. city by Portland, OR.

Last year, nearly 60% of respondents were not able to name an environmentally friendly destination, indicating an opportunity for destinations to connect with travel consumers looking for natural settings, outdoor activities and a sustainable culture. Many developing nations, once dependent on natural resource extraction, are focused on this kind of eco-travel rebranding. Natural resources are generally not renewable commodities, whereas eco-tourism can provide both sustainable income/growth and spur protection of the environment and/or local culture. African nations are beginning to transform their economies — and their landscapes — by building eco-destination brands (with the assistance of Conservational International and other NGOs, as well as local tourism, transportation and hospitality businesses. Madagascar, with their lemurs and other unique animal and plant species, once logged 90% of its forests. Now the country protects its remaining forests. Rwanda has left the genocidal horror of 1994 far behind and now draws 40,000 tourists annually to see its rare mountain gorillas and other species and ecosystems. Kenya now offers an Eco-Rating Scheme that certifies tour operators based on their level of commitment to “sustainable tourism...[that promotes] environmental, economic and social/cultural values”.¹

1) “Eco-Destination Brands” Marketing Green blog, June 30, 2006



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MOTIVATIONS 8: Over the past year, which airline brand has done the best job presenting itself as environmentally friendly? Base your answer on your experience of their green/sustainable-related outreach and communications, sponsorships, advertising, environmental practices, etc. If none, leave blank. **(Please write only one airline)**

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------|------------------------|------------|
| | | 85.5% | 635 |
| American | | 0.8% | 6 |
| Continental | | 2.0% | 15 |
| Delta | | 0.9% | 7 |
| frontier | | 0.3% | 2 |
| horizon | | 0.3% | 2 |
| Iberia | | 0.3% | 2 |
| Jet Blue | | 0.5% | 4 |
| JetBlue | | 0.3% | 2 |
| nature air | | 0.4% | 3 |
| none | | 0.8% | 6 |
| Southwest | | 0.9% | 7 |
| United | | 0.8% | 6 |
| Virgin | | 1.2% | 9 |
| Virgin America | | 0.3% | 2 |
| West Jet | | 0.4% | 3 |
| Westjet | | 0.4% | 3 |
| <i>Other Responses</i> | | 3.9% | 29 |
| | | Valid Responses | 743 |
| | | Total Responses | 743 |



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2010 update: Airlines are not generally associated with environmental friendliness, and respondents showed that no brands had succeeded in changing that image. Continental and Virgin were the only airlines which had a green brand awareness over 1% with our 2010 respondents. Continental, which had the most environmentally-friendly ratings this year, had only half the rating of last year's "winner," Southwest, which fell to 0.9% this year.

Clearly, there are significant opportunities — or challenges — in establishing an environmentally-friendly brand image for an airline, among eco-conscious travelers.

In a poll in the UK, British Airways was voted the brand, company or product with the worst attitude towards the environment. Airlines dominated the top five in the survey, conducted by research company YouGov for British trade magazine *Marketing Week*. British Airways responded that it has "the most long-standing and serious environmental commitment in the aviation industry," but that is not the brand impression it has created with customers. British Airways must overcome well-publicized environmental faux-pas such as flying empty planes between Britain and the U.S. in order to maintain its take-off slots at Heathrow Airport.¹

Airlines can win green points with more up-to-date fleets, which are generally more fuel-efficient. JetBlue has gained market share among green travelers with its newer planes, in-flight recycling and waste-management programs. American Airlines, Singapore Airlines and several other airlines also feature in-flight recycling programs.

Respondents do not seem to be impressed by marketing initiatives like recycling programs, however, which have no effect on the main environmental impact of air travel — i.e. the carbon emissions of jet engines. Branding aside, it may be some time before the airline industry has any substantive sustainability metrics to hang a solid green image on. The general manager for environmental affairs of Cathay Pacific Airlines, Dominic Purvis, says the airline industry will not be able to make itself sustainable for up to 20 years.²









1) "BA voted as the least green brand" Guardian (UK), May 31 2007 15.09

2) "Cathay chief: airlines need 20 years to go green" Media.Asia.com, November 20, 2008

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MOTIVATIONS 8: Over the past year, which cruise line brand has done the best job presenting itself as environmentally friendly? Base your answer on your experience of their green/sustainable-related outreach and communications, sponsorships, advertising, environmental practices, etc. If none, leave blank. (Please write only one cruise line)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| |  | 91.8% | 682 |
| Carnival |  | 1.2% | 9 |
| Celebrity |  | 0.5% | 4 |
| DISNEY |  | 0.3% | 2 |
| Holland |  | 0.3% | 2 |
| Holland America |  | 0.5% | 4 |
| Royal Caribbean |  | 1.2% | 9 |
| <i>Other Responses</i> |  | 2.7% | 20 |
| | | Valid Responses | 743 |
| | | Total Responses | 743 |

2010 update: Cruise lines fared more poorly among respondents than airlines. 91.8% of respondents could not think of a cruise line that presented an environmentally friendly image. Only Carnival and Royal Caribbean cruises managed environmentally friendly ratings over 1% — or better than “none.” As with airlines, cruise lines seeking the business of eco-conscious travelers must establish a better and more visible (and authentic!) brand image in the green travel market. Environmental watchdog groups indicated that cruise lines have a long way to go, for example see Friends of the Earth 2010 “report card” on cruise lines’ environmental impact. Large liners do generate significant emissions (e.g. the QE2 has six diesel engines), accumulate copious garbage, bilge and other waste and it is important for them to make clear improvements in how they manage these areas that can potentially result in significant to the marine environment. Another area of concern is the environmental and cultural impacts of cruise tourism in the destinations they visit. The industry must work to address these issues and be sure they play a key role in ensuring the long term sustainability of the places they operate in.

According to the EPA, a 3,000-passenger cruise ship can generate 1 million gallons of gray water from showers and drains and 200,000 gallons of waste and sewage. While some lines have voluntarily changed their dumping procedures, most vessels still dump tons of raw human waste



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and gray water. The U.S. Coast Guard and the EPA have cracked down on many cruise lines. A new bill restricting hazardous practices is making its way through Congress.²

Well-publicized oil spills from European cruise ships such as Louis Cruise Lines *Sea Diamond*, which sank off Santorini in 2007, have further tarnished the industry's environmental image.

The average traveler interested in green vacations may not know all these details, but can see a general red flag waving in front of the cruise industry. A 2008 survey by the British green travel directory Responsible Travel and The Telegraph newspaper identified cruising as the poorest performing sector of the travel industry in caring for the environment.

1) "Cruise Line Industry Association Reacts Strongly to Environmental Report Card"

TriplePundit.com, May 26th, 2010











2) "How green is your travel company?" Charles Starmer-Smith, Telegraph (UK), January 12, 2008

3) "Federal Agencies Raise Alarm About Cruise Sewage" October 28, 2009 FOX News

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MOTIVATIONS 8: Over the past year, which rental car brand has done the best job presenting itself as environmentally friendly? Base your answer on your experience of their green/sustainable-related outreach and communications, sponsorships, advertising, environmental practices, etc. If none, leave blank. (Please write only one rental car company)

(Respondents were limited to **brief** text responses)

| Response | Chart | Frequency | Count |
|------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| |  | 89.0% | 661 |
| Alamo |  | 0.5% | 4 |
| Avis |  | 1.1% | 8 |
| Budget |  | 0.7% | 5 |
| Enterprise |  | 2.4% | 18 |
| Hertz |  | 2.8% | 21 |
| N/A |  | 0.4% | 3 |
| National |  | 0.8% | 6 |
| none |  | 0.9% | 7 |
| <i>Other Responses</i> |  | 1.3% | 10 |
| | | Valid Responses | 743 |
| | | Total Responses | 743 |

New question for 2010: Surprisingly, two of the most environmentally friendly brands among respondents were rental car companies Hertz and Enterprise. That's not coincidental, however — Enterprise recently began adding Nissan LEAF EVs to its fleet, and already makes hybrid cars available to customers. As part of Hertz's proactive Sustainability Program, it is presently the only rental car company endorsing "CEO Climate Policy Recommendations to G8 Leaders." Additionally, Hertz offers customers its "Green Collection," pre-selected, fuel efficient and environmentally friendly vehicles (with EPA highway fuel efficiency rating of 28 miles or more per gallon) including 5,000 hybrids. Hertz also features the Connect by Hertz car sharing company. Additionally, Hertz undertook initiatives to manage and reduce energy usage at its locations in North America and Europe.

The "environmental friendliness" of competitor brands was average among travel brands and destinations — most significantly, perhaps, 89% of respondents could not think of a rental car company that presented an environmentally friendly image. Few of the brands we asked about



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had a better green rating than “none.” It seems that until rental car companies take more robust measures to change their product line away from one that customers connect with global warming — gas-burning cars — they will have their work cut out for them.

- 1) Press Release: “Enterprise Rent-A-Car to Begin Offering Electric Vehicles in U.S.” July 27, 2010
- 2) *Green Initiatives at The Hertz Corporation* — Executive Summary, Hertz Corporation,

FUTURE TRAVEL PLANS

FUTURE 1: When would you be most likely to go on a “greener” vacation?
(Respondents could only choose a single response)

| Response | Chart | Frequency | Count |
|--------------------------|-------|------------------------|------------|
| In the next three months | | 24.1% | 175 |
| Next six months | | 18.1% | 131 |
| Next 12 months | | 41.0% | 297 |
| More than a year | | 10.3% | 75 |
| Not likely | | 6.5% | 47 |
| Not Answered | | | 13 |
| | | Valid Responses | 725 |
| | | Total Responses | 738 |

2010 update: In 2010, respondents have more plans and/or enthusiasm about green travel than in 2009. There was an 8.3% increase in the number of respondents who said they would most likely go on a greener vacation, as well as a slight decrease in those who said they were not likely to take a green vacation. Over 83% said that they would take one within the next 12 months — 42.2% as soon as soon as the next six months, or sooner. Less than 7% said it was not likely that they take a more sustainable approach to their vacation.






The filtered respondent panel is comparatively proactive in its green travel planning. A September 2008 survey of 3,000 travelers from the general public conducted by online travel community TripAdvisor, 34% percent of US respondents said they would visit an environmentally-friendly hotel or resort in the coming year, up from 30% in a previous survey. The survey also found that 32% of respondents intended to take more environmentally conscious vacations and travel decisions in the next year, compared to 26% in the fall 2007 survey.¹

1) Emerging vacation trend: "lean and green" Boston Globe, October 3, 2008

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FUTURE 2: My next vacation will be...

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|-----------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Less than a week long |  | 20.5% | 149 |
| About a week long |  | 44.2% | 321 |
| About two weeks long |  | 22.4% | 163 |
| About three-four weeks long |  | 6.3% | 46 |
| A month or longer |  | 6.6% | 48 |
| Not Answered | | | 11 |
| | | Valid Responses | 727 |
| | | Total Responses | 738 |













Respondents favored longer trips when planning their next vacation. Almost 45% said their next vacation would be a week long, with an additional 28.7% planning trips of 2-4 weeks. Less than a quarter of respondents were planning trips under a week.

The median answer of one week is long, by modern American standards: the Travel Industry Association (TIA) reported in 2003 that the average American leisure trip was about four days.¹ In 1985, the average pleasure trip lasted 5.4 nights; 30 years ago, it lasted more than a week. At the same time, Americans are taking more frequent trips now (767 million projected trips last year, compared with 680.3 million in 1994). In other words, Americans are traveling more, but getting less of a vacation experience.

1) "More than Two Thirds of Adults Say They Traveled in 2003" press release, U.S. Travel Association, July 1, 2003

FUTURE 3: Where will your next vacation be?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| USA |  | 42.1% | 305 |
| UNSURE |  | 16.7% | 121 |
| Europe |  | 10.8% | 78 |
| Caribbean |  | 6.5% | 47 |
| Central or South America |  | 6.2% | 45 |
| Asia |  | 5.2% | 38 |
| Canada |  | 3.9% | 28 |
| Australia/Pacific |  | 3.2% | 23 |
| Mexico |  | 2.2% | 16 |
| Africa |  | 1.9% | 14 |
| Middle East |  | 1.0% | 7 |
| Antarctica |  | 0.4% | 3 |
| Not Answered | | | 13 |
| | | Valid Responses | 725 |
| | | Total Responses | 738 |

Most respondents (40%) planned to take a vacation within the U.S. when they next traveled. Europe was the next most-popular destination, followed by the Caribbean, Central and South America, and Asia.

These results are roughly similar to the international travel destination rankings found in the most recent Office of Travel and Tourism Industries report, based on an ongoing survey of all Americans leaving the country. For international travelers, Europe was also the most popular destination for Americans, according to OTTI.

1) “U.S. Citizen Air Traffic to Overseas Regions, Canada & Mexico 2009” U.S. Department of Commerce, International Trade Administration, Office of Travel and Tourism Industries.

FUTURE 4: Are you likely to seek out and choose greener vacation options for these travel products in the coming year?

| | Yes | No | Unsure / N/A | Total | Mean |
|--------------|--------------|--------------|--------------|---------------|-------|
| Cruise | 22.8% | 34.4% | 42.8% | 100.0% | 2.200 |
| Airline | 47.6% | 19.9% | 32.5% | 100.0% | 1.849 |
| Hotel | 73.1% | 8.2% | 18.7% | 100.0% | 1.456 |
| Restaurant | 70.4% | 11.8% | 17.8% | 100.0% | 1.475 |
| Tour | 42.4% | 19.5% | 38.1% | 100.0% | 1.957 |
| Rental car | 48.0% | 19.0% | 33.0% | 100.0% | 1.851 |
| Total | 50.9% | 18.7% | 30.4% | | N/A |

Two to seven times as many respondents said that they planned to make greener choices in their travel purchases over the next year as said they were not planning to. Respondents were most interested in making environmentally friendly choices when it came to hotels and restaurants. More than twice as many said they would seek out and choose greener hotel and restaurant options, than said they would not. The one exception to this overall trend was cruise lines.

2010 update: Fewer respondents were going to make environmentally friendly choices in cruise vacations than were not planning to. The ratio reverses the responses from our 2009 survey. It seems as if there is an opportunity — and a need — for cruise lines to market their environmental initiatives among environmentally conscious travelers. And nearly as many respondents as last year said they had no plans to take a cruise vacation.

For the more than 60% of respondents who indicated they would like to “green” their rental car choice, almost every national car rental company now has hybrid, flex-fuel or low-emissions vehicles among their fleet — although industry leader Hertz’s Green Collection consists entirely of midsize sedans with a minimum EPA Highway rating of only 28 Miles per gallon, and includes no compacts. Avis’ Cool Car Eco-Ride Program, on the other hand, includes a fleet of subcompact, compact, and intermediate vehicles in addition to their small fleet of hybrids, all of which carry the EPA’s SmartWay Certified designation. Advantage Rent-a-Car aims to have the nation’s first “all-green” fleet by 2010.¹

For now, there is usually a premium for renting a hybrid, from \$5 to \$15 more per day than an equivalent conventional car. San Francisco International Airport offers travelers renting a hybrid a \$15 credit through its Green Rental Car program, the nation’s first. San Francisco estimates that more than 4,000 tons of CO2 emissions per year will be eliminated



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through the program. The existence of the program, coupled with the city's heavily-marketed appeal as a sustainable tourism destination, is pushing the high-mileage and hybrid component of the airport's rental car fleet from 10%-15%.

1) "Green travel for everyone" November 12, 2009 AllGreenToMe.com (blog)

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CRUISE PRIOR: With which of the following cruise lines have you traveled? Select all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|--------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Carnival |  | 41.1% | 51 |
| Royal Caribbean |  | 33.9% | 42 |
| Princess |  | 27.4% | 34 |
| Holland America |  | 21.8% | 27 |
| Celebrity |  | 21.0% | 26 |
| Norwegian (NCL) |  | 21.0% | 26 |
| Other |  | 18.5% | 23 |
| NONE OF THE ABOVE |  | 9.7% | 12 |
| Costa |  | 4.8% | 6 |
| Disney Cruise Line |  | 2.4% | 3 |
| Azamara | | 0.0% | 0 |
| | | Valid Responses | 124 |
| | | Total Responses | 124 |

Carnival is the leader in the cruise industry, and the line that most respondents had sailed with, as well. Reflecting the broader industry, Royal Caribbean was #2. The other most popular cruise lines — Princess, Holland America, Celebrity and Norwegian — were also represented in that order among the respondents' answers.

Every cruise line mentioned by respondents boasted green credentials. The leader with respondents, Carnival, touts comprehensive initiatives that meet or exceed international and domestic environmental laws and regulations, including an extensive waste-management plan for collecting, storing, processing and disposing of all waste generated aboard Carnival vessels. Carnival also involves its guests in onboard recycling programs.¹ Royal Caribbean appeals to eco-travelers with the eco-efficient design and operation of its ships: a new hull shape and propulsion system resulted in an 8% energy savings across the fleet. RCI has in the past used biodiesel as fuel for several of our ships. Due to concerns over sustainability and costs, the program was discontinued. Royal Caribbean houses two laboratories onboard the *Explorer of the Seas* that study water pollution and climate change in partnership with the [University of Miami's Rosentiel School of Marine and Atmospheric Science](#) and the [National Oceanic and Atmospheric](#)



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Administration (NOAA).

Costa, the “first Green Cruise Line of Europe,” was the first to earn a Green Star notation environmental award in 2005.²

- 1) “CARNIVAL CRUISE LINES COMMITTED TO MINIMIZING ITS ENVIRONMENTAL FOOTPRINT”
Press release, July 8, 2009
- 2) “7 Ocean-Friendly Eco Cruises Hitting the High Seas” Treehugger.com, June 3, 2009

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CRUISE FUTURE 1: What cruise line environmental initiatives are most important to you? (Rank your top five)

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|-------------------------------------------------------------------------|-------|--------------|--------------|--------------|------|------|--------------|--------------|--------------|--------------|
| Built with eco-friendly materials | 1.3% | 3.0% | 1.4% | 4.1% | 2.1% | 2.9% | 0.0% | 0.0% | 0.0% | 7.1% |
| Eco-friendly furnishings | 1.0% | 2.7% | 1.4% | 2.2% | 0.8% | 1.4% | 2.1% | 6.9% | 0.0% | 7.1% |
| Carbon reduction or offsets of guest travel | 1.3% | 3.3% | 1.4% | 1.5% | 2.1% | 1.4% | 0.0% | 3.4% | 0.0% | 0.0% |
| Carbon reduction or offsets of ship operations | 4.8% | 5.0% | 3.8% | 4.9% | 3.3% | 2.9% | 4.2% | 6.9% | 5.0% | 0.0% |
| Organic and / or sustainable food onboard | 9.2% | 4.3% | 8.3% | 6.3% | 9.5% | 5.7% | 4.2% | 20.7% | 5.0% | 7.1% |
| Offers volunteer shore excursions | 2.2% | 1.7% | 0.7% | 1.9% | 1.7% | 4.3% | 6.3% | 3.4% | 0.0% | 7.1% |
| Energy efficiency | 10.5% | 9.4% | 8.3% | 12.3% | 6.2% | 8.6% | 6.3% | 10.3% | 10.0% | 7.1% |
| Water efficiency | 8.9% | 9.0% | 11.5% | 8.2% | 6.2% | 8.6% | 10.4% | 3.4% | 15.0% | 0.0% |
| Recycling | 9.6% | 11.4% | 14.2% | 13.8% | 9.5% | 5.7% | 14.6% | 6.9% | 5.0% | 0.0% |
| Indoor air quality | 6.4% | 3.7% | 3.1% | 4.5% | 4.1% | 4.3% | 4.2% | 0.0% | 10.0% | 0.0% |
| Non-toxic cleaning chemicals | 3.8% | 7.7% | 7.3% | 7.8% | 6.2% | 8.6% | 12.5% | 6.9% | 5.0% | 14.3% |
| Eco-friendly soaps, shampoos, conditioners | 2.5% | 4.3% | 2.1% | 3.0% | 6.2% | 7.1% | 12.5% | 13.8% | 0.0% | 7.1% |
| Occupancy controls to prevent heating/cooling when rooms are unoccupied | 3.5% | 5.0% | 4.2% | 7.5% | 6.2% | 4.3% | 0.0% | 3.4% | 20.0% | 7.1% |

| | | | | | | | | | | |
|-----------------------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Energy controls to reduce heating/cooling when rooms are unoccupied | 4.1% | 5.0% | 5.9% | 4.1% | 7.1% | 7.1% | 4.2% | 0.0% | 0.0% | 7.1% |
| Involvement in local environmental efforts | 1.6% | 3.3% | 1.0% | 2.2% | 5.8% | 4.3% | 0.0% | 3.4% | 5.0% | 0.0% |
| Option to re-use sheets or towels | 8.3% | 11.4% | 9.7% | 5.6% | 11.2% | 10.0% | 8.3% | 0.0% | 5.0% | 14.3% |
| Provides soap and shampoo dispensers (rather than small disposable bottles) | 3.5% | 3.3% | 3.1% | 1.9% | 3.7% | 5.7% | 4.2% | 6.9% | 10.0% | 7.1% |
| Environmentally sustainable waste removal | 17.5% | 6.4% | 12.5% | 8.2% | 7.9% | 7.1% | 6.3% | 3.4% | 5.0% | 7.1% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

The environmental initiatives that respondents looked for in a cruise line were in largely in line with those they looked for in a hotel. Resource conservation was most important to respondents. Recycling, along with energy and water conservation are the three practices that they most look for in a sustainably run cruise line. Cruise lines have prioritized recycling as much as possible, at a point of direct contact with passengers. Crystal Cruises supplies its rooms with recyclable “eco-hangers” that guests are encouraged to take home with them.

When it comes to cruise lines, however, organic and sustainable food is important to respondents, moreso than they are in a hotel. After all, in a hotel you can walk down the block to a natural food store — not an option when at sea. Many cruise ships use processed and canned fruits and fruit juice, as well. So many of respondents said organic, sustainable food were key initiatives they’d like to see on a cruise line, more than were concerned about non-toxic cleaning materials and air quality. Infamous for the quantity of the food they offer passengers in buffets, cruise lines have responded to the tastes of green travelers by focusing on the *quality* of ingredients. Carnival Cruises, among the first cruise lines to give passengers vegetarian options at every meal, recently introduced an all-raw, environmentally-friendly cruise menu created by Portland’s SmartMonkey Foods.



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In a nod to the large environmental footprint of an operating cruise ship, many respondents cited carbon reduction or carbon offsets as green initiatives that were important to them, and almost 22% listed cited carbon reduction/offsets of guest travel among their top five choices, showing that respondents were also concerned about the carbon put into the atmosphere when passengers used air travel to get to the ship, conceivably on the opposite coast from where passengers originated — “a double carbon whammy,” according to Justin Francis, co-founder of Responsibletravel.com.¹

1) Quoted in “Cruise Lines Urged to Shrink Their Footprints,” *Carbon Offsets Daily*, February 18, 2009

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CRUISE FUTURE 2: When provided with the option to participate in a cruise line’s green programming (in-room recycling, less-frequent sheet and towel exchange, etc.), how likely are you to participate?








(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|-----------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Very likely |  | 85.4% | 287 |
| Somewhat likely |  | 12.5% | 42 |
| Unlikely |  | 2.1% | 7 |
| Not Answered | | | 40 |
| | | Valid Responses | 336 |
| | | Total Responses | 376 |

Almost every respondent said that he or she would participate in in-room green programming options offered by the cruise line, at least sometimes, if they were provided (with over 85% saying they would always participate). While convenience is again strong motivator — not getting sheets and towels exchanged required minimal effort from guests, most green programs are opt-in rather than default.

CRUISE FUTURE 3: Where does “green” fall on your list of priorities when selecting a cruise line, if other factors were equal? Mark all that apply:

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-----------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| More important than brand |  | 32.7% | 123 |
| I didn't take a cruise in the past year |  | 30.6% | 115 |
| More important than star rating |  | 22.6% | 85 |
| Least important priority |  | 15.4% | 58 |
| Most important priority |  | 7.7% | 29 |
| More important than price |  | 6.1% | 23 |
| More important than destination/ports |  | 4.0% | 15 |
| | | Valid Responses | 376 |
| | | Total Responses | 376 |

2010 update: The panel of respondents felt that “green” programs and credentials were important when selecting a cruise line. For 32.7%, almost a 5% increase from last year, “green” is more important than brand. And the number who said that “green” was their least important priority fell by more than 5%. Over 22% said that “green” is more important than a cruise line’s star rating; almost the same number who said that “green” was their least important priority in selecting a cruise line.

Recognizing the importance of environmental sustainability for strongly eco-friendly travelers who took cruises, many travel providers have started offering sustainable cruise packages. California-based AdventureSmith Explorations partners with Sustainable Travel International (STI) to offset carbon output. Lindblad Expeditions, in association with the National Geographic Society, supports research and also works with local organizations to implement conservation projects and eco-stewardship. Noted for helping passengers witness threatened regions such as the Antarctic, Lindblad donates ship space for environmental organizations and uses only sustainably-harvested seafood.¹

These environmental programs might not have been put in place without regulatory pressure — but based on these responses, cruise enthusiasts are embracing these green programs and cruise lines find that they are able to connect with more customers by having them.²

1) “How Cruise Lines Are Going Green” Andrea Bennett, *Travel and Leisure*, November 2008

2) “The fall of green travel” Christopher Elliot, Tribune News Services/CNN.com February 2, 2009

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CRUISE FUTURE 4: Please indicate how interested you would be in learning about the following topics onboard your next cruise. Rank up to five.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Total |
|---------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|
| How do cruises produce potable water onboard? | 9.0% | 7.6% | 8.8% | 8.9% | 14.6% | 20.0% | 16.7% | 0.0% | 0.0% | 9.3% |
| How does the ship move? | 2.3% | 2.5% | 1.6% | 2.6% | 2.2% | 0.0% | 16.7% | 0.0% | 40.0% | 2.5% |
| How do cruises source food? | 8.6% | 13.0% | 9.2% | 14.2% | 17.5% | 0.0% | 0.0% | 16.7% | 0.0% | 11.6% |
| How do ships recycle? | 15.9% | 15.2% | 20.4% | 17.9% | 8.0% | 30.0% | 0.0% | 0.0% | 0.0% | 16.0% |
| How do ships generate electricity onboard? | 4.0% | 5.1% | 9.2% | 10.5% | 11.7% | 10.0% | 16.7% | 16.7% | 20.0% | 7.5% |
| What do cruises do with all onboard waste? | 16.6% | 18.4% | 18.0% | 16.3% | 11.7% | 10.0% | 16.7% | 0.0% | 0.0% | 16.5% |
| What do ships do to be more environmentally friendly onboard? | 25.6% | 15.9% | 13.2% | 15.8% | 10.9% | 20.0% | 0.0% | 0.0% | 0.0% | 17.0% |
| How can I be a more responsible tourist? | 12.3% | 13.7% | 10.0% | 4.7% | 9.5% | 10.0% | 0.0% | 66.7% | 20.0% | 10.8% |
| How do the suppliers sustain their food sources? | 5.6% | 8.7% | 9.6% | 8.9% | 13.9% | 0.0% | 33.3% | 0.0% | 20.0% | 8.8% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | |



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New question for 2010: Some cruise ships offer an onboard presentation about the ship's efforts to be more eco-friendly. Respondents clearly identified the top four environmental topics they would like to learn about:

- 1. What ships do to be more environmentally friendly*
- 2. What ships do with waste produced during a cruise*
- 3. How ships recycle*
- 4. How cruises source food*

These would-be passengers were also interested in how food suppliers produced and sustained their food, and what passengers and tourists could do to be more environmentally responsible. The number who said that "green" was their least important priority fell by more than 5%. 9.2%, less than half as many, said a cruise line's sustainability program was their *most* important priority.

To maximize their green branding efforts, cruise lines often make passenger presentations a regular part of their eco-friendly procedures onboard. Disney Cruise Lines officers supervise shipboard environmental education classes, which highlight waste minimization and separation and recycling efforts, and offer an "Environmentality Challenge" for young passengers. During some voyages on the Cunard Line, an Environmental Officer will appear as a guest on the ship's morning TV show to further discuss and explain what the company does to protect the environment. Holland America offers environmental presentations on every cruise. On cruises to Alaska and Antarctica, enrichment speakers also deliver a variety of environmental and ecological presentations.^{1,2} Celebrity Cruises offers lecture series ranging from environmental to technical issues with their Ocean Ahead program.




1) Disney Cruise Lines Community Report 2008

2) From Ship to Shore: Sustainable Stewardship in Cruise Destinations, Conservation International

BUSINESS TRAVEL

BUSINESS 1: Does your company have an official policy promoting environmentally friendly business travel?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| No |  | 60.2% | 227 |
| Yes |  | 22.5% | 85 |
| I don't know |  | 17.2% | 65 |
| Not Answered | | | 23 |
| | | Valid Responses | 377 |
| | | Total Responses | 400 |

New question for 2010: Most respondents worked for companies that did not have an environmentally friendly business travel policy.

The last major study on corporate green travel policies, in 2007, found that most companies did not have sustainable travel considerations written into their travel policies.

The survey, by the Association of Corporate Travel Executives and travel technology firm KDS, found that only a third of companies presently had travel policies promoting sustainable travel. However the study also found that another third were developing eco-friendly travel policies.¹ Anecdotal reports collected by *USA Today* in late 2009 indicates that those policies are continuing to trend green — more and more major corporations asking hotels about sustainable policies for their business travelers.²

1) “Most Corporate Travel Policies Lack Sustainability Considerations” *Environmental Leader*, February 23, 2007

2) “More companies want employees to stay in 'green' hotels” *USA Today*, November 9, 2009



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BUSINESS 2: Do you support or oppose your company adopting an official policy promoting environmentally friendly business travel?

(Respondents could only choose a **single** response)





| Response | Chart | Frequency | Count |
|------------------|-------|------------------------|------------|
| Strongly support | | 50.7% | 191 |
| Support | | 33.4% | 126 |
| Neutral | | 14.9% | 56 |
| Oppose | | 0.3% | 1 |
| Strongly oppose | | 0.8% | 3 |
| Not Answered | | | 23 |
| | | Valid Responses | 377 |
| | | Total Responses | 400 |

New question for 2010: Over 84% of respondents supported their company's adopting an environmentally friendly travel policy — most of those strongly supported the idea. 15% were neutral and a little over 1% opposed green travel policies.

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BUSINESS 3: If your company gave you guidelines for adopting more environmentally friendly behaviors while traveling on business, would you be more likely to incorporate these into your personal travel as well?

(Respondents could only choose a **single** response)




| Response | Chart | Frequency | Count |
|-------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Very likely |  | 60.9% | 229 |
| Somewhat likely |  | 28.2% | 106 |
| Neutral |  | 10.1% | 38 |
| Not likely | | 0.3% | 1 |
| Not at all likely |  | 0.5% | 2 |
| Not Answered | | | 24 |
| | | Valid Responses | 376 |
| | | Total Responses | 400 |

New question for 2010: Almost 90% of respondents said that they would be likely to incorporate environmentally friendly business travel practices into their personal/leisure travel — most said they would be very likely to do so. In fact, those who said that green business travel would not influence their personal travel were statistically insignificant.

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BUSINESS 4: When traveling on business, does your company’s travel policy recommend that you consider staying at hotels that have environmentally friendly programs in place?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| No |  | 60.6% | 228 |
| Yes |  | 19.9% | 75 |
| I don't know |  | 19.4% | 73 |
| Not Answered | | | 24 |
| | | Valid Responses | 376 |
| | | Total Responses | 400 |

2010 update: The trend towards using green hotels for business is still emerging. While there was a modest, 4% increase in reports of companies recommending that their employees stay at hotels with green programs, what was more impressive is the nearly 15% drop in of employers that did not have travel policies favoring green hotels. Growing awareness of the importance of doing business sustainably is driving a shift in this ratio, however, which is all but guaranteed to continue. The National Business Travel Association conducted a survey that showed an increase of 16% from July 2008 to July 2009 in the number of companies reporting the importance of environmental practices in choosing a travel company.

USA Today reports that before signing contracts, more and more of America’s biggest and most prestigious companies — organizations like Oracle, KPMG and the American Institute of Architects — are asking hotel chains detailed questions about environmental policies such as towel-washing frequency.

A recent report by the Association of Corporate Travel Executives (ACTE) and KDS indicated that 28% of corporate travel departments are required to report to management on carbon emissions performance.¹

“Corporations want to be able to say, ‘This is what we’re doing.’ They can put it in their annual reports,” said Linda Chipperfield of the environmental certification group Green Seal.² According to Amy Spatrisano of consulting firm MeetGreen, however, price, location and availability will continue to be the most important drivers in business travel purchasing.^{3,4}

1) “Are Cost-Conscious Companies Ditching Green Business Travel?” SustainableLifeMedia.com, February 13, 2009




2, 3) “More companies want employees to stay in 'green' hotels” Roger Yu, USA Today, November 9, 2009

4) “Employees Directed to Use ‘Green’ Hotels” *Environmental Leader*, November 9, 2009

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BUSINESS 5: If your company’s reservation system could highlight preferred hotels that have environmentally friendly programs in place, would you be more inclined to choose those options?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes |  | 78.9% | 292 |
| I don't know |  | 14.3% | 53 |
| No |  | 6.8% | 25 |
| Not Answered | | | 30 |
| | | Valid Responses | 370 |
| | | Total Responses | 400 |

New question for 2010: Often the most powerful catalyst for change is convenience. Almost 80% of respondents said they would be more inclined to choose green hotel options if they appeared in their company’s reservation system.




Recently GetThere, the world’s leading online travel procurement system, began letting companies integrate green policies in their managed travel programs with *GetThere Green*. The solution helps companies deliver relevant messaging on carbon emission data and supplier green status. These messages serve to educate travelers about the carbon footprint of their journey and impact choices they make in the booking process.¹

1) “Travel Procurement Meets Green” *BusinessWeek*, April 28, 2008

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BUSINESS 6: Does your company's travel policy recommend that you consider booking your travel (air, car, etc.) in an environmentally friendly manner (e.g., recommend options with a lower CO2 footprint)?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| No |  | 56.6% | 211 |
| Yes |  | 22.0% | 82 |
| I don't know |  | 21.4% | 80 |
| Not Answered | | | 27 |
| | | Valid Responses | 373 |
| | | Total Responses | 400 |

2010 update: While there was only a modest, 2% rise in the number of business travelers who said they worked for companies that recommended environmental considerations in business travel, the number of companies did not make eco-conscious travel recommendations dropped by 15%. That was seen in the sharp rise of respondents who said they didn't know, which could mean that environmental concerns are shaping corporate travel policies somewhat gradually.

Four in five companies (79%) in the 2008 ACTE/KDS survey cited cost-cutting as their chief business travel concern. “At this stage, green travel choices remain scarce and are usually more expensive,” said Yves Weisselberger, CEO of KDS. “For example, European companies can send their staff by high-speed rail, which is low in emissions but often more expensive than a low-cost flight. However, in the current economy, paying a premium is hard to justify, so green business travel will lose out.”

“Longer term, though, the picture is brighter. Companies clearly want to do the right thing through sustainability,” Weisselberger added.¹ Although the pace of adoption is slow, it seems certain that with other business practices moving in a more environmentally friendly direction, more companies will make green travel recommendations, or book green travel directly for their employees.

One countervailing trend that is greening business travel — by supplanting it entirely — is the adoption of video conferencing. Between high-end systems from Cisco and Teliris and inexpensive Internet-based solutions like Skype, more and more analysts are looking at video conferencing as a permanent (if partial) replacement for business travel.⁴ Web conferencing was cited by executive respondents in the ACTE/KDS survey as one of the top sustainable business strategies of 2009, in part due to its financial benefits.⁵ In a 2008 “Earth Day Green Survey” by communications provider Genesys, 62% of 18,000 respondents said their employers either issued

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companywide policies to reduce travel or are more closely monitoring travel. The study also found that 87 percent of meetings with people not located in the same office are now conducted virtually by phone or a Web meeting.⁶

In the view of John Monaghan, director of event management, lodging, food and beverage for Marriott International, future unified communications developments will go even further in removing the need for vast amounts of travel. With business travel costs set to rise with the cost of fuel in coming years and video conferencing improving, he says it's inevitable. "If you are perhaps communicating with a source supplier in China, or Hong Kong, whether it's minute details in fabric or perhaps they are creating a new brand image for you on one of your cans then you will be able to see all the details you need," he said.⁷

As *Green to Gold* author Andrew Winston writes in the Harvard Business Review, "With their pitch of reducing travel, who are Cisco, HP, and the others truly competing against? The phone? No, they're going after the airlines — and targeting their best, most frequent, business-class customers. Do you think the airlines ever thought they'd be competing with IT companies?"

"Looking at the business through a green lens yields some interesting opportunities — like competing in a completely different industry — and helps identify some serious risks, such as facing that unexpected "out of left field" competition. What can the airlines do to respond? Well, I wouldn't be shocked to see an innovator like Virgin Airlines get into the teleconferencing business (since Richard Branson donned a wedding gown to launch a brides' business, nothing he does surprises me). But that's a Hail Mary pass."⁸

1) Quoted in "Are Cost-Conscious Companies Ditching Green Business Travel?" SustainableLifeMedia.com, February 13, 2009

2) "Corporate Travel To Decline 15% In 2009 | PhoCusWright report" Hospitality.net, July 31, 2009

3) "A Meeting in New York? Can't We Videoconference?" Joe Sharkey, New York Times, May 11, 2009

4) "Travel Experts Consider Shift to 'New Normal' for Business, Leisure Travel" press release, U.S. Travel Association, September 10, 2009

5) "Are Cost-Conscious Companies Ditching Green Business Travel?" SustainableLifeMedia.com, February 13, 2009

6) "Green Technology -Survey Finds Web Meetings Are Increasing, Companies Getting Greener" GreenTMC.net, April 17, 2008





7) "UC REMOVES THE NEED FOR VAST AMOUNTS OF TRAVEL, ACCORDING TO A BUSINESS FIGURE" Outsourcery.com, September 21, 2009

8) Andrew Gold, "Will Videoconferencing Kill Business Class Travel?" *Harvard Business Review*, August 3, 2009

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BUSINESS 7: Which of these statements do you most agree with?

(Respondents could only choose a **single** response)






| Response | Chart | Frequency | Count |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| My “environmentally friendly” choices are about the same on business and leisure travel. |  | 70.7% | 266 |
| I select “environmentally friendly” options when traveling for business, even if more expensive, but then choose the least expensive option when traveling for leisure. |  | 9.8% | 37 |
| I select “environmentally friendly” options when on vacation, even if more expensive, and less expensive options when traveling on business. |  | 9.8% | 37 |
| I select “environmentally friendly” options when on vacation, even if more expensive, and would for business as well but cannot due to travel policy constraints. |  | 9.6% | 36 |
| Not Answered | | | 24 |
| | | Valid Responses | 376 |
| | | Total Responses | 400 |

2010 update: Most respondents — over 70% — made the same, environmentally conscious choices whether traveling for business or leisure. An additional 9.6% said that travel policy constraints at work kept them from making their business travel as environmentally friendly as their leisure travel. The number of respondents who went with environmentally friendly options in *either* business or leisure travel was equivalent.

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BUSINESS 8: When you attend a business event, how important is it to you personally that the organizers utilize environmentally friendly practices within the event (e.g., no bottled water, recycling, paperless options, donating unused food to homeless shelters, etc.)?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Very important |  | 54.3% | 207 |
| Somewhat important |  | 32.5% | 124 |
| Neutral |  | 11.3% | 43 |
| Not very important |  | 0.8% | 3 |
| Not at all important |  | 1.0% | 4 |
| Not Answered | | | 19 |
| | | Valid Responses | 381 |
| | | Total Responses | 400 |

2010 update: As more business events “go green,” so do the expectations of attendees. More than 86% of respondents said that it was at least somewhat important to them that organizers of business events utilize environmentally friendly practices. Less than 2% of did not think it was important, and only 11% had no opinion in the matter.

In a recent survey conducted by the events-planning industry publication *MeetingNews*, 93% of the 202 corporate and association meeting planners queried said they planned to incorporate at least some green elements into their meetings in 2010. That would indicate a very strong trend towards eco-friendly events, since more than 20% of the respondents on this study did not yet incorporate such elements.




But Allyson Wagner, project manager for event management firm Meeting Consultants, Inc., said, “This is becoming a standard. It’s something that clients expect now. They’re starting to look for this in their RFPs. If it’s not already there, they’re adding it in. They’re expecting not only venues but their other vendor partners to bring something to the table.”¹

1) “Research: More Meetings Cutting Paper, Energy, Wasted F&B” Jay Boehmer, SuccessfulMeetings.com, November 17, 2009

MEETING PROFESSIONALS

MEETINGS 1: When organizing or planning a meeting or conference, does your company explicitly work to incorporate Green Meeting options (e.g., select a venue that is close to public transportation, reducing print communications, option to teleconference, etc.) into the event?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes |  | 53.0% | 96 |
| No |  | 27.6% | 50 |
| I don't know |  | 19.3% | 35 |
| Not Answered | | | 8 |
| | | Valid Responses | 181 |
| | | Total Responses | 189 |








2010 update: According to respondents who organize or plan meetings and conferences, most companies consider and incorporate environmentally sustainable measures for their events. 53% reported sustainable event planning (e.g. local venues with teleconferencing options). That represents almost a 20% drop from 2009. 27.6% said their companies did not plan any Green Meeting options — a 6% rise. The balance is reflected in the number of respondents who did not know if their company had a green meetings policy.

Event planners and green business advocacy groups, who have pushed for green elements to business events such as transportation, paper use and power consumption, are now looking even deeper into meeting planning processes and operations. However, obstacles to planning more environmentally friendly meetings remain, from a lack of appropriately sustainable venues in some markets to executive resistance at the perceived additional expense of greener events.

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MEETINGS 2: Which of these websites, if any, have you visited for more information on planning or producing greener business events? Please mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|-------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| NONE OF THE ABOVE |  | 69.3% | 131 |
| Green Meeting Industry Council |  | 11.1% | 21 |
| Meeting Professionals International (MPI) |  | 11.1% | 21 |
| Professional Convention Management Association (PCMA) |  | 6.9% | 13 |
| Convention Industry Council |  | 6.9% | 13 |
| Blue Green Meetings |  | 5.8% | 11 |
| Other |  | 2.1% | 4 |
| | | Valid Responses | 189 |
| | | Total Responses | 189 |

Green Meeting Industry Council (GMIC) and Meeting Professionals International (MPI) were the leading online resources for green business events among respondents. The top three resources were used, on average, by 5% fewer respondents this year.

MEETINGS 3: What would motivate you to implement sustainable strategies in your next business event? Please rank up to three.

Respondents were asked to **rank** their choice(s).

| | 1 | 2 | 3 | 4 | 5 | 6 | Total | Mean |
|-------------------------------------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|-------|
| More information on how to do it | 33.8% | 18.0% | 19.1% | 20.0% | 20.0% | 33.3% | 24.8% | 1.758 |
| Mandate from client or organization | 12.5% | 10.2% | 20.2% | 6.7% | 20.0% | 66.7% | 13.8% | 2.200 |
| Climate change | 13.8% | 10.9% | 15.7% | 20.0% | 0.0% | 0.0% | 13.3% | 1.962 |
| Cost savings | 17.5% | 37.5% | 24.7% | 20.0% | 40.0% | 0.0% | 25.8% | 2.058 |
| Regulations | 7.5% | 9.4% | 7.9% | 26.7% | 0.0% | 0.0% | 8.8% | 2.086 |
| Monetary incentive by employer to choose more sustainable options | 15.0% | 14.1% | 12.4% | 6.7% | 20.0% | 0.0% | 13.8% | 1.855 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | | N/A |

What the majority of respondents said they needed, in order to have greener business events, was information. Not far behind were financial motivations, i.e. the confidence that sustainable strategies would save them money. **2010 update: Similarly, respondents suggested that monetary incentives to choose more sustainable options (a new question this year) would be a significant motivator.** According to said Green Meetings Industry Council executive director Tamara Kennedy-Hill, if event planners had more information, they would also have more confidence about reducing expenses by holding greener events. “So many of these [green event] practices are cost-saving elements,” Kennedy-Hill said.











Half as many respondents said that client mandates would prompt them to go green for their next event. Over a quarter of respondents cited global warming as a reason to have greener business events, about the same number that mentioned green regulations that would need to comply with.¹

1) Quoted in “Research: More Meetings Cutting Paper, Energy, Wasted F&B” Jay Boehmer, SuccessfulMeetings.com, November 17, 2009

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MEETINGS 4: When planning a business event, in which of the following areas (if any) do you incorporate sustainable practices? Mark all that apply.

(Respondents were allowed to choose **multiple** responses)

| Response | Chart | Frequency | Count |
|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Transportation options (e.g. shuttles, transit, hybrid vehicles, offsets) |  | 56.6% | 107 |
| Food and beverage (e.g. no bottled water, local food, organic food, composting) |  | 50.3% | 95 |
| Communication strategies (e.g. electronic vs. paper) |  | 47.1% | 89 |
| Destination selection (e.g. close to the majority of participants) |  | 46.6% | 88 |
| On-site operations (e.g. recycling, energy efficient business machines, etc.) |  | 44.4% | 84 |
| Accommodation selection |  | 38.6% | 73 |
| Venue selection |  | 36.0% | 68 |
| NONE OF THE ABOVE |  | 13.2% | 25 |
| Exhibitions |  | 12.2% | 23 |
| Other |  | 1.6% | 3 |
| | | Valid Responses | 189 |
| | | Total Responses | 189 |

2010 update: Transportation options were what respondents were most interested in incorporating into their sustainable event planning this year. Sustainable food and beverage service, communications strategies, onsite operations and venue selection were less of a concern this year than last year.

IBM's 2009 Information on Demand conference in Las Vegas was a successful example of a greener event that utilized almost all of these practices. Wherever possible, organizers used digital media instead of paper and sent food waste to compost instead of landfills. Conference planners even converted the vinyl banners from the conference hall into tote bags after the event. Organizers were optimistic that they could recycle more than 92% of the event's waste, last year's total.

Certain cities have put together particularly effective sustainable event infrastructures that appeal



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to organizations concerned about holding greener conferences. Planners at Oracle chose San Francisco for the massive OpenWorld event because the city could meet all the criteria mentioned by respondents, from recycling and landfill diversion to local and organic food and beverage options. San Francisco's green-certified hotels feature the "clearly marked recycling Containers" and "environmentally sound cleaning products" that Oracle's event guidelines call for. Oracle also adjusted the frequency of the OpenWorld shuttle buses to optimize their efficient use.¹

1) "Research: More Meetings Cutting Paper, Energy, Wasted F&B" Jay Boehmer, SuccessfulMeetings.com, November 17, 2009

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MEETINGS 5: Do you find that suppliers are able to meet your sustainability requests?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Sometimes |  | 54.8% | 97 |
| I don't know |  | 18.6% | 33 |
| Yes |  | 16.4% | 29 |
| No |  | 10.2% | 18 |
| Not Answered | | | 12 |
| | | Valid Responses | 177 |
| | | Total Responses | 189 |

2010 update: Across the board, sustainable business is still a work in progress. That is reflected in the majority of respondents among event planners who said that suppliers were only able to meet their sustainability requests some of the time, the smaller percentage who said that suppliers were able to meet sustainability requests, and the slightly larger percentage who said suppliers could not help them with green events.

Some sustainability-oriented cities like San Francisco and Portland, OR offer venues, policies and suppliers geared to sustainable events. Yet as other communities vie for the fast-growing green event market, eco-friendly suppliers are stepping in. Pittsburgh had not been a city typically associated with the green movement, yet it held a very successful “green jobs” conference in 2008. *Green for All* activist Van Jones organized his “Dream Reborn” conference in Memphis. Despite dire predictions, the environmentally sustainable aspects of the sold-out event were well-executed.¹






“It’s definitely a planner’s market right now, and most suppliers are being very supportive of all endeavors — including green,” said Dahlton Bennington, CMP, CMM, director of business meeting services for Fort Lauderdale-based Spherion Corp. “Suppliers are looking at CSR [corporate social responsibility] and green practices as a means of differentiating themselves from the competition and are much more willing to get creative and come up with new ideas for green meetings.”²

1) “How to Cure Green Fatigue: Five Ways to Make Your Eco-Events More Effective” PlanetGreen.com, Aug 19, 2008

2) Quoted in “Lean and Green” Rachel Gecker, MeetingsNet.com, Jul 1, 2009

MEETINGS 6: Do you plan on incorporating more green/sustainable business event practices in the future?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Yes, immediately |  | 36.0% | 63 |
| Yes, within 6 months |  | 17.1% | 30 |
| Yes, within the year |  | 16.6% | 29 |
| Uncertain |  | 26.9% | 47 |
| No |  | 3.4% | 6 |
| Not Answered | | | 14 |
| | | Valid Responses | 175 |
| | | Total Responses | 189 |

2010 update: Sustainability is a strong trend in business events, as over 70% of respondents said they planned on incorporating more sustainable business event practices in the future, only slightly less than last year. However, there was an almost 7% decline among those who said they planned to incorporate those practices immediately, and a rise in those who said they planned to within the year.

In the 2009 FutureWatch study prepared by event-planning industry analysts at Meeting Professionals International, “More green meetings” held the No. 4 position in trends that would influence meetings for 2009, up from No. 5 the year before. While some management and planners see the recession as a barrier in prioritizing green events, Dahlton Bennington of Spherion Corp., sees the current economy as “a great tool for leveraging green efforts” that save her company money or are cost-neutral. After every one of her events, Bennington asks suppliers to donate the floral arrangements to local nursing homes, hospitals and other organizations. Every supplier has complied with the request, and Spherion has not spent one cent on the recycling.¹




“There is this notion that green meetings are more expensive than non-green meetings,” said Nancy Wilson, CMP, of MeetGreen. “It baffles me. We always tell our clients, ‘If it makes good business sense, do it.’ This is sustainability — and that means your company has to survive as well. If you come across a green practice that costs you money, then don't do it. But 99.9 percent of the time you will save money.”² A negligible percentage of respondents — 1.7% — did not plan on making their events more sustainable.

1, 2) Quoted in “Lean and Green” Rachel Gecker, MeetingsNet.com, Jul 1, 2009

| |
|---------------------|
| DEMOGRAPHICS |
|---------------------|

DEMOG 1: What is your relationship status?

(Respondents could only choose a **single** response)






| Response | Chart | Frequency | Count |
|---------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Married, Domestic Partnership, Civil Union, etc. |  | 51.2% | 361 |
| Single |  | 30.5% | 215 |
| In a relationship |  | 18.3% | 129 |
| Not Answered | | | 13 |
| | | Valid Responses | 705 |
| | | Total Responses | 718 |

More than 51% of respondents were married or in a domestic partnership or civil union, an almost 8% increase over last year's group. Another 20.5% not in a formal union were in a relationship, leaving 18.3% who declared themselves single.

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DEMOG 2: What is the highest level of education you have attained?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|-----------------------------------------|-----------------------------------------------------------------------------------|------------------------|------------|
| Did not earn High School Diploma or GED |  | 0.6% | 4 |
| High school graduate / GED |  | 14.7% | 104 |
| Bachelor's Degree |  | 46.3% | 327 |
| Master's Degree |  | 30.0% | 212 |
| Doctoral Degree |  | 8.5% | 60 |
| Not Answered | | | 11 |
| | | Valid Responses | 707 |
| | | Total Responses | 718 |

84.8% of respondents had a college degree; nearly 40% had advanced degrees.



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DEMOG 3: Which of the following describes your ethnicity?

(Respondents could only choose a **single** response)


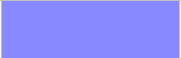








| Response | Chart | Frequency | Count |
|-----------------------------------|-------|------------------------|------------|
| White/Caucasian | | 77.6% | 548 |
| I PREFER NOT TO RESPOND | | 7.2% | 51 |
| Asian | | 5.5% | 39 |
| Hispanic or Latino | | 3.5% | 25 |
| Mixed Race | | 1.8% | 13 |
| Black | | 1.6% | 11 |
| Native American or Alaskan Native | | 1.3% | 9 |
| Other | | 1.1% | 8 |
| Native Hawaiian/Pacific Islander | | 0.3% | 2 |
| Not Answered | | | 12 |
| | | Valid Responses | 706 |
| | | Total Responses | 718 |

2010 update: the clear majority of respondents were white. While 8% fewer said they were white, 7.2% of respondents chose a new category for this year's survey and declined to state their ethnicity. There were more Asians as a percentage of this year's group — 5.5% to 3.7% last year. Hispanic, Mixed Race and Black respondents each represented less than 4% of participants to the survey.

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DEMOG 4: Which “communities” do you consider yourself to be affiliated with? (mark all that apply)

(Respondents were allowed to choose **multiple** responses)
























| Response | Chart | Frequency | Count |
|--------------------------------|-------------------------------------------------------------------------------------|------------------------|------------|
| Outdoor activities / adventure |  | 45.8% | 329 |
| Environmentalist |  | 44.6% | 320 |
| Academic |  | 29.0% | 208 |
| Social / political activist |  | 28.0% | 201 |
| Spiritual / yoga |  | 23.8% | 171 |
| Religious |  | 18.2% | 131 |
| LGBT |  | 17.7% | 127 |
| Vegetarian / vegan |  | 16.4% | 118 |
| NONE OF THE ABOVE |  | 9.7% | 70 |
| Other |  | 6.4% | 46 |
| | | Valid Responses | 718 |
| | | Total Responses | 718 |

2010 update: Over 44% considered themselves environmentalists, and over 40% were active in political and social causes. Outdoor activities and adventures were much more popular with this year’s group, with 45.8% participating — a 9.1% jump from last year. Almost 30% were part of the academic community and another 23.8%% had a spiritual orientation and/or practiced yoga —a 5.7% jump perhaps reflecting the increasing popularity of yoga.

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DEMOG 5: Please select the broad category of your current job, if presently employed.

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|--------------------------------------------|-------------------------------------------------------------------------------------|-----------|-------|
| Education & Library |  | 12.1% | 84 |
| Other: |  | 11.7% | 81 |
| RETIRED |  | 10.4% | 72 |
| Tourism / Hospitality |  | 9.9% | 69 |
| Business & Financial |  | 7.1% | 49 |
| Art, Design, Entertainment, Media & Sports |  | 6.1% | 42 |
| Life, Physical & Social Sciences |  | 4.9% | 34 |
| Marketing / Advertising / PR |  | 4.9% | 34 |
| Office & Administrative |  | 4.6% | 32 |
| Management |  | 3.9% | 27 |
| Computer & Mathematical |  | 3.3% | 23 |
| Sales |  | 3.2% | 22 |
| UNEMPLOYED |  | 3.0% | 21 |
| Architecture & Engineering |  | 2.6% | 18 |
| Community & Social Service |  | 2.3% | 16 |
| Legal |  | 2.3% | 16 |
| Personal Care & Service |  | 2.3% | 16 |
| Meeting or Event Planner |  | 1.7% | 12 |
| Transportation & Material Moving |  | 0.9% | 6 |
| Food Preparation & Serving |  | 0.7% | 5 |
| Farming & Forestry |  | 0.6% | 4 |
| Military |  | 0.6% | 4 |
| Production Occupations (e.g., Assembly) |  | 0.4% | 3 |



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| | | | |
|---------------------------------------------|--|------------------------|------------|
| Construction | | 0.3% | 2 |
| Buildings and Grounds Maintenance | | 0.1% | 1 |
| Protective Occupations (Fire, Police, etc.) | | 0.1% | 1 |
| Not Answered | | | 24 |
| | | Valid Responses | 694 |
| | | Total Responses | 718 |

Respondents came to the study from a wide range of professions, though education, hospitality/tourism, community service and management were the most well-represented. 10.4% said they were retired, and 3% (a small drop from last year) indicated that they were unemployed at the time of the survey.


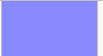


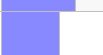

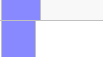
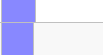

Tourism/hospitality professionals accounted for 9.9% of respondents, while meeting/event planners were 1.7% of the total.



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DEMOG 6: Please select your annual household income (US Dollars)

(Respondents could only choose a **single** response)


















| Response | Chart | Frequency | Count |
|--------------------------------|------------------------------------------------------------------------------------|------------------------|------------|
| \$0 - \$49,999 |  | 20.0% | 140 |
| \$50,000 - \$74,999 |  | 17.7% | 124 |
| \$75,000 - \$99,999 |  | 14.1% | 99 |
| \$100,000 - \$134,999 |  | 12.6% | 88 |
| \$135,000 - \$174,999 |  | 8.1% | 57 |
| \$175,000 - \$249,999 |  | 3.7% | 26 |
| \$250,000 - \$374,999 |  | 2.1% | 15 |
| \$375,000 - \$1,000,000 |  | 1.3% | 9 |
| \$1,000,000 or more | | 0.3% | 2 |
| I PREFER NOT TO RESPOND |  | 20.0% | 140 |
| Not Answered | | | 18 |
| | | Valid Responses | 700 |
| | | Total Responses | 718 |

2010 update: The largest single group of respondents, at 20%, was comprised of respondent households that earned under \$50,000 a year. However, 60% of respondents made \$75,000 to \$1 million or more, a 6% increase over the 2009 survey. 20% of respondents declined to state their income when given the choice in this year's survey.

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DEMOG 7: Please select the year you were born...

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------|-------------------------------------------------------------------------------------|-----------|-------|
| 1920 |  | 0.6% | 4 |
| 1925 | | 0.1% | 1 |
| 1931 | | 0.1% | 1 |
| 1934 | | 0.3% | 2 |
| 1935 | | 0.3% | 2 |
| 1936 | | 0.1% | 1 |
| 1937 | | 0.1% | 1 |
| 1938 |  | 0.4% | 3 |
| 1939 |  | 0.6% | 4 |
| 1940 | | 0.3% | 2 |
| 1941 |  | 0.4% | 3 |
| 1942 |  | 1.1% | 8 |
| 1943 |  | 0.7% | 5 |
| 1944 |  | 1.3% | 9 |
| 1945 |  | 1.3% | 9 |
| 1946 |  | 0.8% | 6 |
| 1947 |  | 2.1% | 15 |
| 1948 |  | 2.5% | 18 |
| 1949 |  | 1.8% | 13 |
| 1950 |  | 3.1% | 22 |
| 1951 |  | 2.9% | 21 |
| 1952 |  | 1.8% | 13 |
| 1953 |  | 2.8% | 20 |
| 1954 |  | 3.1% | 22 |

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| | | | |
|-------------|--|-------------|-----------|
| 1955 | | 2.5% | 18 |
| 1956 | | 2.1% | 15 |
| 1957 | | 2.8% | 20 |
| 1958 | | 2.4% | 17 |
| 1959 | | 2.4% | 17 |
| 1960 | | 2.2% | 16 |
| 1961 | | 3.9% | 28 |
| 1962 | | 3.1% | 22 |
| 1963 | | 2.8% | 20 |
| 1964 | | 1.5% | 11 |
| 1965 | | 1.4% | 10 |
| 1966 | | 1.8% | 13 |
| 1967 | | 2.1% | 15 |
| 1968 | | 2.4% | 17 |
| 1969 | | 1.4% | 10 |
| 1970 | | 2.1% | 15 |
| 1971 | | 2.6% | 19 |
| 1972 | | 1.9% | 14 |
| 1973 | | 1.0% | 7 |
| 1974 | | 1.1% | 8 |
| 1975 | | 2.4% | 17 |
| 1976 | | 2.1% | 15 |
| 1977 | | 2.6% | 19 |
| 1978 | | 1.7% | 12 |
| 1979 | | 1.5% | 11 |
| 1980 | | 2.6% | 19 |
| 1981 | | 2.9% | 21 |



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| | | | |
|------|--|------------------------|------------|
| 1982 | | 2.2% | 16 |
| 1983 | | 2.8% | 20 |
| 1984 | | 2.2% | 16 |
| 1985 | | 1.8% | 13 |
| 1986 | | 1.1% | 8 |
| 1987 | | 0.8% | 6 |
| 1988 | | 0.6% | 4 |
| 1989 | | 0.4% | 3 |
| 1990 | | 0.1% | 1 |
| | | Valid Responses | 718 |
| | | Total Responses | 718 |

Mirroring the larger demographics of society as a whole, the age profile among the respondent pool skews in the direction of the Baby Boom — particularly its tail end: the year with the largest representation is 1961.

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DEMOG 8: Gender

(Respondents could only choose a **single** response)





| Response | Chart | Frequency | Count |
|----------|-----------------------------------------------------------------------------------|------------------------|------------|
| Female |  | 67.7% | 486 |
| Male |  | 32.3% | 232 |
| | | Valid Responses | 718 |
| | | Total Responses | 718 |

More respondents in this year's survey were female — a 9.1% increase over last year.

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DEMOG 9: How many children under age 18 live in your home?

(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|------------|-----------------------------------------------------------------------------------|------------------------|------------|
| 0 |  | 82.9% | 595 |
| 1 |  | 8.9% | 64 |
| 2 |  | 5.7% | 41 |
| 3 |  | 2.1% | 15 |
| 4 | | 0.3% | 2 |
| 5 | | 0.0% | 0 |
| 6 | | 0.0% | 0 |
| 7 | | 0.1% | 1 |
| 8 | | 0.0% | 0 |
| 9 | | 0.0% | 0 |
| 10 | | 0.0% | 0 |
| 11 or more | | 0.0% | 0 |
| | | Valid Responses | 718 |
| | | Total Responses | 718 |

17.1% of respondents had children in the home, a slight increase over last year's survey. The rest — 82.9% — had no children in the home.



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NEXT STEPS

This important study would not have been possible without the support of our sponsors Travelocity and RCI (Azamara Club Cruises, Celebrity Cruise Lines and Royal Caribbean International). Through these sponsorships, this report is available to the entire travel, tourism and hospitality industry at no charge, for the benefit of all readers, their companies and organizations, and the world.

The 1st Annual CMIGreen Traveler Report has been downloaded and referenced by hundreds of professionals, NGOs, academics and journalists, spanning over 50 countries across the globe, from Australia to Greenland, from Syria to Argentina and from Namibia to South Korea.

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Your company will be able to ask dedicated, proprietary questions within the survey (i.e. results from your questions will be confidential for your use only, and not included in the public report). Topics may include how your company ranks among green consumers; questions about the influences of green advertising in consumer choice of your product or service; review and impressions of your company's and competitors' creative for the market; influence of charity contributions, etc. We will help you with question design.

Your sponsorship helps CMIGreen continue to offer the valuable data from these reports FREE to the tourism and hospitality industries, as well as to students, non-profits/NGOs, etc. to create an OPEN SOURCE body of knowledge. This approach advances the cause for all of us, and our planet. Your company logo will also appear on the final report, and all PR and communications related to the report.

Option 1: Two Sponsored Questions: \$3,500

Option 2: Four Sponsored Questions: \$5,500

The 3rd Annual CMIGreen Traveler Study will be produced in spring 2011. Please contact tom@CMIGreen.com to discuss sponsorship options.



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CUSTOM RESEARCH METHODOLOGIES

For companies or organizations requiring full service research services, please contact CMIGreen, the leading green tourism consumer research specialists.

THERE IS A DIFFERENCE.

Market research studies and resulting statistics are meant to help marketers understand the green consumer, and influence educated decisions about their strategies and tactics. However, *not all research is the same*. CMIGreen's methodologies and experience are distinct from those of others when considering approaches, survey respondent sources—and ultimately—the validity and utility of sought-after results.

DIVERSITY: THERE IS NO “GREEN MARKET”

CMIGreen emphasizes that there is no “green market,” just as there is no singular “women’s market.” Green consumers represent a broad and dynamic variety of interests, sensitivities, preferences and priorities. Those, plus variations in geographical location, age, income, relationship status, gender and more, make it even more important to discover which opportunities *within green* will help you achieve your goals. Fine tuning your approaches based on highly refined and well-targeted matches within “green” will make your outreach initiatives more efficient and cost-effective, and will significantly improve your marketing ROI.

TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE

CMIGreen takes pride in operating the most comprehensive green tourism study in the world. But we don't stop there. *Quantitative* (data) research is one important side of a coin, but only tells half of the story. The other side of a comprehensive research initiative involves *qualitative* research, most notably derived from focus groups. We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We are able to conduct groups in most major metro areas across the USA, Canada and Britain, as well as several secondary markets. We've found that the same creative, tested in different regions, often yields substantially differing results. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns?

CMIGreen is the only green-dedicated research provider that develops and facilitates green traveler focus groups and other qualitative research options. We have produced and reported on focus groups covering a wide variety of topics, plus we have run advisory board series, multi-year customer satisfaction survey projects and field studies which can round out a comprehensive market intelligence plan.

To discuss your custom research requirements and goals, please contact tom@CMIGreen.com.