



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



The CMIGreen Traveler Study 2009

Rising public awareness of sustainability issues and understanding consumer preferences and behaviors presents new opportunities for the tourism and hospitality industries. The fundamental question today is not “whether” sustainability will influence consumer choice and your bottom line, but “how.”

The **CMIGreen Traveler Study** answers this question based on consumer sampling and 17+ years of observation, analysis and case study.

Travel and hospitality consumers are rapidly and enthusiastically becoming educated on the issues, and demanding greater social and environmental engagement from destinations and suppliers. There is a shift in consumer consciousness that is resulting in a rethinking of consumption patterns toward more responsible, earth-friendly alternatives. Tourism and hospitality industry leaders are similarly 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 **Green Traveler Study**, designed to provide industry leaders with information and insights to understand, reposition and leverage the opportunities of the emerging sustainable travel marketplace.

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CMIGreen 1st Annual Green Traveler Survey Report

Introduction

The travel industry is entering a transition as profound as any since the dawn of the jet age. As the planet warms and resources diminish, consumers are demanding sustainable business practices from travel providers. Travel and tourism and hospitality suppliers across the industry are scrambling to make their operations more environmentally responsible — and their brands more green.

But what is green travel? Without a consistent set of environmental standards for the travel and tourism industry, defining sustainable practices has been left to the market. To varying degrees, hotels, restaurants, airlines, cruise lines, and tour operators are implementing systems they think will satisfy their customers' expectations. Consequently, travelers must navigate a staggering variety of “green” travel brands, claims and messages, and judge the merits of over 350 different environmental tourism certifications.

If consumers are driving the “environmentally friendly” practices of the travel and tourism industry, from energy-saving thermostats to carbon offsets and voluntourism expeditions, then the more important question to ask is: who is the green travel consumer? What does green travel mean to him or her? Aside from surveys of travelers from the general population or very limited, focused questionnaires, little has been known about the green travel consumer's expectations, values, attitudes and behavior.

Creating a profile of Green Travelers

Travel research experts at CMIGreen have created the first-ever 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 2009, the Green Traveler Study asked nearly 1800 “eco-conscious” travelers:

- How do they travel, how much and where?
- What does “sustainable” or “green” travel mean to them?
- 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?

By leveraging these insights into who their customers really are, 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.



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Methodology

The Green Traveler Report is the first comprehensive study *on green travelers*. 4,109 adults from across the nation were surveyed on sustainable travel by Community Marketing, Inc. from May 22 to July 8, 2009.

This is not a general study of USA consumers. The study focuses exclusively on the 1,736 respondents who consider themselves to be “extremely” or “very” eco-conscious and who took at least one overnight vacation in the past year.

Respondents were selected from CMI’s proprietary survey panel and from the email lists of participating travel and tourism partners (see logos on cover). The study marks and measures key trends in sustainable, eco and green travel, but the survey panel is not intended to reflect national census data or demographic distribution.

Thomas Roth is president of Community Marketing, Inc. (CMI). The San Francisco-based company, founded in 1992, connects their tourism and hospitality clients with LGBT, green, and other trend-leading “niche” segments through consumer research, strategic planning and highly targeted communications channels.

We welcome your involvement in this “open source” study, and welcome your participation in our next study. Please contact us with your interest.

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KEY FINDINGS

The emergence of green travel has been a sea of change for the travel industry. Customer demand has only driven a serious, industry-wide response within the last five years. Travel and tourism businesses have now jumped on a wide range of practices and a wider range of messaging, all without a clear understanding of who the green traveler is.

The findings below summarize the results of the 2009 **CMIGreen Green Traveler Survey**. The industry's first in-depth investigation of the expectations, behavior and views of eco-friendly travelers, the Green Traveler Survey identified key findings that can help innovative companies implement practices that go beyond greenwashing.

Key Finding #1:

The Many Shades of Green Travel

The sustainable travel market is not a solid block of green, but a spectrum. Respondents to this survey include business travelers who reuse towels in a hotel room, and *voluntourists* who collect garbage on the slopes of Mount Everest. Sustainable travelers come with a wide range of motivations. Leading sustainable travel providers must know who their customers are, what drives them, and how to tune their products and messaging accordingly, in anticipation of a groundswell of green travel demand.

On one end of the green travel spectrum is the business and leisure traveler seeking to minimize the environmental impact of the comfort and convenience of contemporary travel. To meet the expectations of the “traditional” green traveler, travel and hospitality businesses must provide an exceptional experience using best practices in sustainable operations and management. San Francisco's Orchard Hotel has won plaudits as one of the top luxury hotels in the U.S. while at the same time becoming the country's first hotel to win LEED environmental certification. Royal Caribbean offers luxury suites with whirlpool baths, balconies and separate bedrooms on the same ship that houses working laboratories that study water pollution and climate change. By visibly reducing environmental effects without compromising the fundamental pleasure of travel, both companies have been able to create differentiation and maintain market leadership.

On the other end of the scale are “ecotravelers” interested in “responsible travel to nature areas that conserves the environment and improves the well-being of local people.”¹ Ecotourism is at least as much about *experiencing* the destination as the way that experience is packaged and delivered.

Labels like “ecotraveler” don't tell the whole story, however. There are travelers all along the green spectrum. Sleeping in luxury eco-tents while on safari at Kenya's Campi Ya Kanzi is a very different experience from riding Responsible Travel's five-day, 276km bike trek over 4400-meter Himalayan passes in Ladakh. And “true blue green” sustainability activists may change their travel plans to stay at green hotel but never set foot in nature, while some voluntourists

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building Honduran schools don't know what their carbon footprint is, and don't care. Making uninformed decisions about the wants and needs of your customer leads to expensive mistakes.

So what shade of green is your customer?

Insight: Success in the green travel market requires understanding where on the green travel spectrum your customers are. By understanding their motivations — and how price, convenience, comfort, quality and *experience* shape their behavior — you can connect with travelers, offering a unique, sustainable service with a value proposition clearly articulated for them.

Key Finding #2:

Do Green Travelers Walk the Walk?

Green travelers come with many types of motivations — and varying degrees of commitment. 54% of respondents report that they had taken a “greener” vacation in the last 12 months. When asked about the actions they had taken as green travelers, 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. However, when it came to more substantive, proactive environmental measures, only 19% say they “researched and booked greener accommodations.” Less than a quarter rented a more fuel-efficient car; only 12.6% offset the impact of their travel.

In a question about which top five motivators make them choose a hotel, respondents ranked “the hotel’s environmental program” eighth out of 15 total possible attributes. Practical benefits like price, location, quality and brand are still the primary influences in their travel purchasing decisions.

Every respondent in this survey identified him or herself as “eco-conscious.” However, only 19.1% identified themselves as “extremely” eco-conscious. Over and over again, it is this ±20% minority that makes the strongest, most committed environmental travel choices. The takeaway for travel-related businesses: Listen to what your green travel customers say they want, but watch what they really do.

Insight: The responses show that travelers are interested in sustainability. When it comes to their purchasing behavior, however, for all but the most committed of green travelers, green travel choices can be a secondary consideration compared to price, convenience and location.

As a recent Information Resources study suggested, “there are certain segments of the population that are environmentally sensitive, but that does not necessarily translate into their actual behavior. This inconsistency is the real challenge for marketers and retailers in order for them to fully understand the nuances of green consumers and how to market to them effectively.”²

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.

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Key Finding #3:

Low Tolerance for High Premiums – The Green Price Point

43% of survey respondents say they would be willing to pay up to 5% more to decrease their “ecological footprint” on their next trip; almost as many say they would pay more than that. Yet in another question, 61% of respondents said that they did not pay anything more to stay at a “greener hotel” in the last 12 months. 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? Or is green not something customers will actually pay extra for?

Insight: Make green concrete. For most people, environmental sustainability is still a relatively abstract concept — LEED certification, carbon offsets and sustainable materials lack the impact of concrete, practical issues like price and convenience. Flipping 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 who would pay a premium for sustainability.

Key Finding #4:

Travel Industry’s Sustainability Practices “Need Work”

How green is travel in 2009? That depends on whom you ask. From hotels to cruise lines to restaurants, leading travel and tourism businesses are highlighting environmentally friendly practices as part of their commitment to sustainability. But how meaningful are those practices? To this well-traveled and eco-conscious group, not very much. When asked to evaluate the green initiatives, practices and communications of each sector of the travel industry, the best answer most respondents could give was “needs work.” There were a large number of “terrible” votes, as well, for car rental companies, cruise lines, airlines and meetings/conventions. Too many travel companies are doing little or nothing to minimize their environmental impact; other businesses’ highly touted recycling and conservation efforts were viewed as superficial “greenwashing.”

Business travelers have their own demand-side issue — only 15% of respondents have employers whose “company policy recommends staying at hotels with green programs when traveling on business.” For the hospitality industry, that leaves the other 85% of employers — a vast and untapped market. To bid for business travel, greener hotels must identify the needs of corporate travel managers and market to them, clearly and convincingly.

Insight: The greening of the travel industry 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.

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Key Finding #5:

The Green Leadership Vacuum: Room for Differentiation

When asked which hotel brand, airline, cruise line or destination had done the best job of presenting itself as environmentally friendly, few respondents were able to name any. Only one brand seemed to have a clear, green identity: Costa Rica, whose national parks and biological diversity have made it a perennial favorite with eco-travelers. Respondents voted hotel chain Kimpton [a study partner] and Southwest Airlines as the environmentally friendliest brands in their categories with only a 4% response. And the cruise line that received the most votes from respondents was “none.”

Many of the brands that received few votes (i.e., almost all of them) trumpeted strong environmental programs. Experienced green travelers such as the respondents tend to be “green skeptics” when brands fail to “walk the walk,” backing up clear green messaging with meaningful sustainability practices.

But the responses also point to a vacuum in leadership in green travel. Companies in every segment of the travel industry have put important, innovative sustainability initiatives in place. But with the possible exception for Costa Rica, no brand has 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. Sustainability programs with “teeth,” and targeted, accurate, compelling and benefit-oriented messaging will enable leading firms to differentiate themselves from competitors and gain “mind share” among green travel consumers.

Key Finding #6:

Green Skepticism: The Need for Certification

What is green travel? For respondents, everything from carbon offsets to sacred places makes traveling “more green/sustainable.” Given the spectrum of travelers who call themselves green, the wide range of green initiatives touted by travel businesses is not surprising. Consumers recognize that recycling aluminum beverage containers does not make United Airlines “green” in the same way that being off the power grid makes British Columbia’s Siwash Lake Ranch “green,” even though both claim to be “taking steps to preserve the environment through responsible management.” The result, for green travelers, is confusion — and cynicism. Over 75% of respondents were skeptical, to some degree, of the environmentally responsible claims of hotel operators. Almost 25% said they were skeptical of *all* green claims.

As the sustainable travel industry matures, widely recognized, trusted certification is needed to establish standards for green travel. Over 40% of respondents looked for 3rd party certification to verify that a travel supplier is truly “environmentally friendly.” However, there are presently over 350 “green” travel or hospitality certifications — and 97% of respondents could not name any.

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 Michelin, 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. But 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.

Key Finding #7:**Business Travel — Unsustainable?**

Business travel has been slowed by the economy, and as respondents indicate, so has the commitment to green business travel. The majority of respondents said they had not traveled on business in the last 12 months. Those who did, however, did not receive strong green travel directives from their companies. Over 75% said their employers did not recommend staying at hotels with green initiatives, and over 70% did not recommend booking travel and transportation with the environment in mind.

Insight: Businesses are “talking the talk” when it comes to corporate social responsibility and commitment to the environment. Studies indicate that more and more companies are making environmentally responsible travel part of their mission. Given the results of our study, however, that is not translating into dollars spent on green hotels and carbon offsets for jet travel. The current, slow economy has changed the way companies think about sending their employees on the road. Most are cutting back on travel. As the economy improves, will business travel pick up? Will that travel be greener? Or will less expensive and more environmentally friendly alternatives like videoconferencing continue to take the place of business travel?

Key Finding #8:**The most sustainable sector — meeting planning**

The hundreds of thousands of business events held around the world each year are a mainstay of the travel industry. Between jet travel, electricity and paper usage and waste generated, however, they have a chain-reaction impact on the environment. But event planners, perhaps more than any other segment, are trying to tread more lightly on the planet. 72% of respondents in the event-planning industry said their companies explicitly work to incorporate “green meeting” options into events — selecting venues close to public transportation, reducing print communications, insisting on sustainable on-site operations, teleconferencing, recycling, sourcing local food, not using bottled water, etc. 75% said they planned do more green events in the next year, most of those immediately.

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With over 80% of all respondents saying they expected sustainable practices in business events (and half of couples now seeking green options for their wedding), it seems as if market demand will keep greening the meeting and event business.

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.”

More than 65% of respondents said that more information would help motivate them to implement sustainable event strategies — a clear message to green meeting advocates and suppliers that better marketing and communications are needed.

Key Finding #9:

Voluntourism: Still a Green Shoot

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. However, our survey confirms what other studies have indicated: at this point there is more interest and expectation than participation. Nearly 50% of respondents said they were interested in volunteering while traveling on a future trip, yet only 26% had actually done so. Only time will tell if voluntourism engages more green travelers or is another instance of the gap between green intentions and green action. One tangible result: 58% of voluntourist respondents report that they have continued their involvement with their volunteer project, a tendency mirrored in other volunteerism studies.

Insight: Volunteerism presents great potential to businesses across the travel industry. 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 #10:

Travelers Influenced by Each Other — Not Advertising

This survey demonstrated unequivocally that peer influence — “word of mouth from friends” — has the greatest influence on consumers (48% said very influential) when planning a vacation. “Traveler reviews on websites and blogs” were “very influential” to half as many respondents.

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.

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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 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



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Type: Extremely+Very Eco-Conscious Travelers

Date: 10/9/2009

Filter Using: (1a How would you evaluate your awareness of environmental issues, and related behav... = I consider myself extremely eco-conscious OR 1a How would you evaluate your awareness of environmental issues, and related behav... = I consider myself very eco-conscious) AND 7 (# of Vacations that included at least one overnight) > 0

Number of Responses Analyzed: 1736

Total number of responses collected: 4131

Green Awareness and Sensitivity

Environmental Actions

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

Response	Chart	Frequency	Count
I recycled at home		92.6%	1607
I made an effort to conserve resources: water/gas/electricity		87.3%	1515
I used a refillable water bottle, rather than a disposable one		75.2%	1305
I made a conscious decision to avoid buying unnecessary things		71.9%	1249
I purchased local products		67.3%	1169
I recycled at work		65.3%	1133
I purchased organic food products		62.0%	1077
I purchased recycled household products (paper towels, etc.)		56.2%	976
I composted		37.3%	648
I purchased fair trade products		35.3%	613
I am vegetarian or I reduced consumption of animal products		35.1%	609
I used public transportation		34.4%	597
I bicycled or walked to work		24.9%	432
I purchased environmentally friendly pet products		19.8%	344
I used an “eco-friendly” dry cleaner		10.4%	180
		Valid Responses	1736
		Total Responses	1736

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

Convenience was a significant factor; a majority reported easy-to-do actions like conserving electricity and using a refillable water bottle. Only 37.3% composted, however, and even fewer



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were willing to make more substantive changes in their lifestyles, like switching to a vegetarian diet, taking public transportation or commuting by bicycle. In the words of sustainable business writer/entrepreneur Joel Makower, “When it comes to ‘change,’ Americans love the noun, hate the verb.”



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 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>

Environmental Awareness

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 very eco-conscious		80.1%	1390
I consider myself extremely eco-conscious		19.9%	346
I consider myself somewhat eco-conscious		0.0%	0
I'm not eco-conscious		0.0%	0
		Valid Responses	1736
		Total Responses	1736

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. That drop-off is roughly in line with the numbers of “true blue green” respondents in this survey adopting intensive eco-friendly measures that would be part of an “extreme” eco-conscious lifestyle, like bicycle commuting and a vegetarian diet. Other surveys have put the “true blue green” group at as little as 11%.¹ However, consumers who are committed to sustainability tend to have an outsize, even activist effect, that pushes businesses to implement green practices.

In a survey of over 4000 adults from the general public conducted by the marketing agency Ypartnership, 85% considered themselves to be “environmentally conscious.”




1) “Are you a true-blue green or an apathetic?” Eric Berger, Houston Chronicle (blog), November 21, 2005

2) “Travelers Unwilling to Pay More For Green Travel” *Sustainable Travel* blog, August 26, 2009

Green Purchases

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		3.2%	55
Maintained green purchases		63.2%	1096
Increased green purchases		33.7%	584
Not Answered			1
		Valid Responses	1735
		Total Responses	1736

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. In fact, more than a third actually *increased* their green purchases.

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>

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Choose Money or the Environment?

Let's explore how you evaluate economic vs. environmental concerns. If you arrived in an unexpectedly cold climate and needed a fleece jacket, would you most likely purchase:

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

Response	Chart	Frequency	Count
A used jacket at a thrift store?		42.6%	730
A much more expensive fleece jacket if it is made from sustainable materials?		33.0%	565
A very inexpensive fleece jacket to conserve immediate financial resources, even if it may not be as durable as a higher quality one?		24.4%	419
Not Answered			22
		Valid Responses	1714
		Total Responses	1736

With most respondents indicating that they would buy a used jacket, a mix of environmental and cost considerations led the largest group of respondents, 42.6%, to say they would buy a used jacket. Most thrift-store clothing is neither organic nor made from sustainable materials, but compared to even a garment fully made from sustainable materials, there is no manufacturing-related environmental cost to used clothing. The EPA Office of Resource Conservation and Recovery says that Americans are throwing away more than 68 pounds of clothing per person per year — 4% of the municipal solid waste. Used clothing is also significantly less expensive. (Respondents did not indicate which factor influenced their decision more strongly to buy from a thrift store.)

A third of respondents would purchase a sustainably manufactured, new garment. Another quarter indicated both financial concerns, and a preference for new clothing in opting for a new garment made from cheaper materials. High-end brands like Patagonia have been the leaders in using sustainable and recycled materials for their outdoor apparel, and Patagonia's fleece garments made from recycled plastic bottles have become icons of the sustainable travel lifestyle. But sustainability is no longer a boutique niche in clothing — the world's largest purchaser of organic cotton fiber is actually Wal-Mart/Sam's Club.

“New sustainable apparel programs are being introduced from major brands such as Banana Republic and GUESS,” says Elaine Lipson, author of *International Market for Sustainable Apparel*.¹

1) “Hold On to Your Organic Hat, the Global Sustainable Apparel Market Is Going to Skyrocket” Packaged Facts press release via PR Newswire, April 28, 2007

Purchasing Behavior

Are you more or less likely to purchase from companies...

		Very likely	Somewhat likely	Neutral	Less likely	Not likely	Total	Mean	Std Dev
with favorable green policies and practices?	Count	1150	512	62	1	2	1727	1.375	0.569
	% by Row	66.6%	29.6%	3.6%	0.1%	0.1%	100.0%		
that sponsor green/environmental events and organizations?	Count	838	675	196	6	4	1719	1.640	0.712
	% by Row	48.7%	39.3%	11.4%	0.3%	0.2%	100.0%		
that advertise in green publications and websites?	Count	574	668	450	19	9	1720	1.966	0.828
	% by Row	33.4%	38.8%	26.2%	1.1%	0.5%	100.0%		
that contribute to a conservation or community development project?	Count	944	640	125	7	1	1717	1.533	0.653
	% by Row	55.0%	37.3%	7.3%	0.4%	0.1%	100.0%		
Total	Count	3506	2495	833	33	16	6883	N/A	N/A
	% by Row	50.9%	36.2%	12.1%	0.5%	0.2%	100.0%		

Corporate environmental responsibility is important to green consumers. 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. Almost 90% of respondents were very likely or somewhat likely to choose companies that actively contributed to green projects like conservation or community development. Over 70% of respondents said they would be at least somewhat likely to purchase from companies that advertised in green publications and websites.

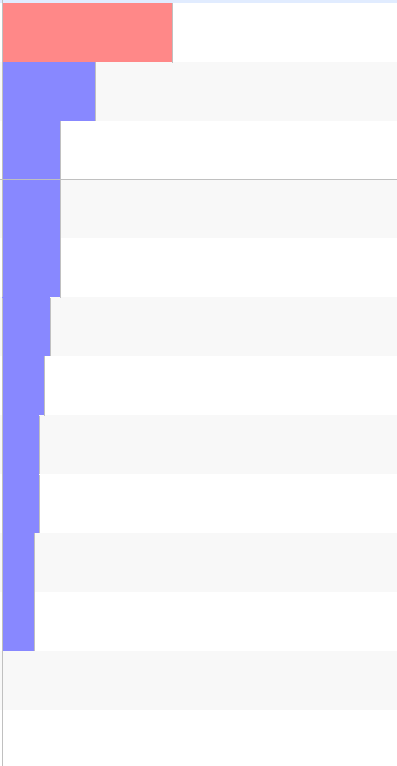
The general population also has a preference for companies with responsible environmental practices — and the inquisitiveness to find out what those practices are. Half the respondents from a large panel questioned in the National Marketing Institute's 2007 LOHAS Consumer Trends Database™ were interested in 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)

Use of Environmental Media

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

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


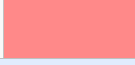
Response	Chart	Frequency	Count
National Geographic		39.9%	692
Other		19.1%	332
Mother Jones		10.3%	178
Audubon		10.1%	176
Mother Earth News		10.0%	174
Utne		7.4%	128
Friends of the Earth		6.1%	106
Grist		5.2%	91
E-Environment Magazine		4.9%	85
Good		3.5%	60
Ode		3.4%	59
Ecologist, The		2.9%	50
Earth Island Journal		1.6%	27
		Valid Responses	1736
		Total Responses	1736

National Geographic was the clear winner among environmentally themed publications and websites with 39.9% — 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 *Mother Jones*, *Audubon*, *Utne* 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 travel more frequently.

Attendance at Events

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

Response	Chart	Frequency	Count
Earth Day events, activities or festivities		32.0%	555
Local “Green” Festival or Expo		34.4%	597
		Valid Responses	1736
		Total Responses	1736



Environmentally themed events are a strong draw for green consumers, as shown by respondents. 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 by sponsoring the Earth Day Network and local/regional Earth Day events across the country included Marriott, Virgin America, Timberland and Toyota in 2009.

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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		86.1%	1495
Canada		7.9%	137
United Kingdom		0.9%	16
Australia		0.9%	15
Germany		0.3%	6
New Zealand		0.3%	6
India		0.3%	5
Argentina		0.2%	4
Thailand		0.2%	4
Costa Rica		0.2%	3
South Africa		0.2%	3
Switzerland		0.2%	3
Brazil		0.1%	2
Ecuador		0.1%	2
Ireland		0.1%	2
Israel		0.1%	2
Japan		0.1%	2
Mexico		0.1%	2
Netherlands		0.1%	2
Panama		0.1%	2
Puerto Rico		0.1%	2
Afghanistan		0.1%	1
Ascension		0.1%	1

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Austria		0.1%	1
Bermuda		0.1%	1
Chile		0.1%	1
Czech Republic		0.1%	1
Fiji		0.1%	1
Finland		0.1%	1
France		0.1%	1
Hungary		0.1%	1
Iraq		0.1%	1
Jamaica		0.1%	1
Korea (South)		0.1%	1
Mongolia		0.1%	1
Nepal		0.1%	1
Norway		0.1%	1
Portugal		0.1%	1
Spain		0.1%	1
Sweden		0.1%	1
United Arab Emirates		0.1%	1
Venezuela		0.1%	1
		Valid Responses	1736
		Total Responses	1736

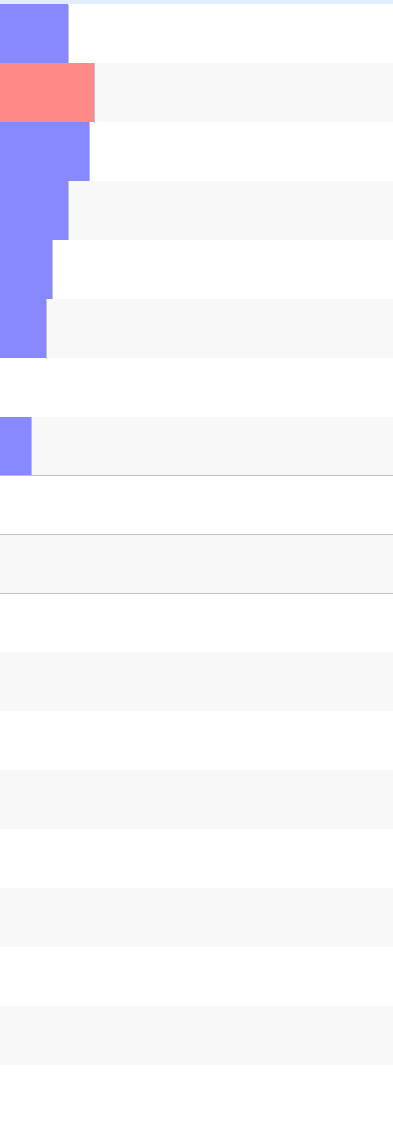
As this table indicates, most respondents (94.5%) in the study live in North America — 86.6% in the United States and another 7.9% in Canada. Other nations had a representation of less than 1% each among respondents.

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Overnight Trips

How many vacations have you taken in the past 12 months, where you were away at least one night?

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

Response	Chart	Frequency	Count
1		14.1%	244
2		20.7%	360
3		19.4%	337
4		13.5%	234
5		9.9%	171
6		8.1%	140
7		2.5%	43
8		4.0%	69
9		0.7%	13
10		2.6%	46
11		0.1%	2
12		2.0%	35
14		0.1%	2
15		0.7%	13
16		0.2%	3
18		0.1%	2
20		0.7%	12
30		0.2%	3
Other Responses		0.4%	7
		Valid Responses	1736
		Total Responses	1736

Respondents participated in leisure travel relatively frequently. 75.6% had taken at least two vacations away from home during the last year (with overnight stays of at least one night), and

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22% 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% of American workers took no paid vacation time last year and another 24% 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 9 and 30 vacations with overnight stays over the past year.

1) *San Francisco Chronicle*, August 17, 2008















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Hotel Nights -- Vacation

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

Statistic	Value
Valid Responses	3034
Total Responses	3034
Maximum	200
Minimum	0
Mean	11.517
Median	8.000
Mode	0

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

Response	Chart	Frequency	Count
0		9.5%	157
1		4.0%	67
2		7.3%	121
3		6.7%	111
4		5.8%	96
5		5.4%	90
6		4.8%	80
7		5.0%	83
8		3.8%	63
9		2.0%	34
10		7.8%	130
11		1.0%	16
12		4.6%	77
13		0.8%	13

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14		3.0%	50
15		4.0%	66
16		1.3%	21
17		0.8%	13
18		1.6%	26
19		0.2%	3
20		5.5%	91
21		1.6%	27
22		0.3%	5
23		0.5%	8
24		1.0%	16
25		2.0%	34
26		0.2%	4
27		0.2%	3
28		0.5%	8
29		0.2%	3
30		3.0%	49
32		0.3%	5
34		0.2%	3
35		0.8%	14
38		0.1%	2
40		1.2%	20
42		0.1%	2
45		0.5%	8
47		0.1%	2
50		0.3%	5
56		0.1%	2
60		0.7%	12

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65		0.1%	2
70		0.2%	3
75		0.1%	2
<i>Other Responses</i>		0.8%	14
		Valid Responses	1661
		Total Responses	1661

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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Hotel Nights -- Business

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

Statistic	Value
Valid Responses	2286
Total Responses	2286
Maximum	200
Minimum	0
Mean	8.985
Median	2.000
Mode	0
Sum	20540.000

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

Response	Chart	Frequency	Count
0		42.0%	528
1		3.7%	46
2		6.9%	87
3		5.4%	68
4		4.2%	53
5		5.1%	64
6		1.8%	23
7		1.8%	23
8		2.6%	33
9		0.6%	8
10		5.3%	67
11		0.2%	2
12		2.7%	34

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14		1.0%	12
15		2.4%	30
16		0.2%	3
18		0.4%	5
19		0.2%	2
20		3.0%	38
21		0.2%	3
22		0.2%	2
25		1.0%	13
27		0.2%	2
28		0.3%	4
30		2.0%	25
35		0.5%	6
40		0.6%	7
45		0.2%	3
50		0.8%	10
55		0.2%	2
60		0.7%	9
65		0.2%	2
70		0.2%	2
75		0.2%	3
80		0.2%	2
100		0.5%	6
120		0.2%	2
150		0.3%	4
190		0.2%	2
200		0.2%	3
<i>Other Responses</i>		1.4%	18

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	Valid Responses	1256
	Total Responses	1256

While 42% of respondents did not stay at hotels, inns or resorts while on business, the majority of respondents — 58% — did. More than a third of respondents stayed between 2-10 nights in hotels, inns and resorts. Some respondents indicated that they stayed at hotels for as many as 200 nights during the 12-month period for personal or vacation travel.

Vacation Spending

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? (Please estimate in US Dollars if you are outside the USA.)

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

Statistic	Value
Valid Responses	1602
Total Responses	1602
Maximum	90000.000
Minimum	0.000
Mean	4341.883
Median	2500.000
Sum	6955697.000
Standard Deviation	6168.985

Green travelers spent a median of \$2,500 while on personal travel in the last 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

Destinations

Where did you travel in the past 12 months, where you were away at least one night? Mark all that apply.

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

Response	Chart	Frequency	Count
USA		89.6%	1525
Europe		20.4%	347
Canada		16.4%	279
Mexico		12.5%	212
Caribbean		11.2%	191
Central / South America		10.5%	179
Asia		7.5%	128
Australia/Pacific		4.2%	71
Africa		3.3%	56
Middle East		1.9%	33
		Valid Responses	1702
		Total Responses	1702

A considerable majority of respondents — almost nine out of ten — traveled within the United States and stayed at least one night away from home in the past year. However, more than 20% traveled to Europe as well, and more than 10% of respondents also traveled to Canada, 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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Trip Purpose

Which types of vacation(s) did take in the past 12 months, where you were away at least one night? Mark all that apply.

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

Response	Chart	Frequency	Count
Personal travel (visit family or friends)		73.6%	1253
Independent travel: I researched and booked each part on my own		51.4%	875
City		39.1%	665
“Staycation” (exploring closer to home)		22.8%	388
Resort vacation		22.1%	376
Adventure vacation (combo of physical, outdoor and cultural)		19.2%	326
Cruise		11.8%	201
Festival		11.2%	191
Car camping		10.2%	173
Other		9.2%	157
Independent “packaged” trip (bundled air/car/hotel)		8.0%	137
Organized group tour		7.5%	127
Backpacking		7.5%	127
Educational tour		6.8%	116
Volunteer trip		5.1%	86
Motor home/trailer vacation		2.9%	49
		Valid Responses	1702
		Total Responses	1702







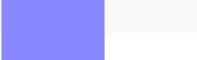


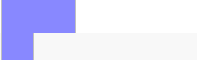
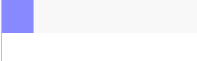
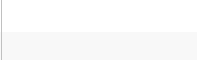
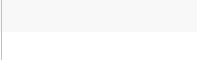
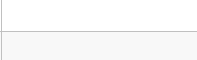
Respondents reported that, in line with the general population, most of their travel was to visit family and friends — and even that was down. Air travel decreased by 4% during the Thanksgiving 2009 holiday, and according to the AAA overall travel was down 1.9% during the July 4 holiday.

However, responses revealed a remarkable variety in the types of travel, from cities (39.1%) to adventure vacations (19.2%), and stays at resorts (22.1%) to car camping and backpacking (a combined 17.7%). In a nod to the recessionary environment, 22.8% of respondents reported that they had taken “staycations” close to home. One other significant result: more than half of respondents researched and booked their vacations on their own.

Travel Websites

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		49.7%	833
Expedia		48.7%	816
Orbitz		42.3%	709
Hotels.com		29.3%	490
A destination's website (the tourism office or visitor's bureau)		29.0%	486
Priceline		25.7%	431
Kayak		25.3%	424
AAA		24.8%	415
Other		18.3%	307
A dedicated eco-tourism website		7.2%	121
Adventure.travel		2.6%	43
Virtual Tourist		2.3%	39
IgoUgo		2.2%	37
c-fares.com		0.3%	5
		Valid Responses	1675
		Total Responses	1675

Almost half of respondents used at least one travel-specific website in the past 12 months, with Travelocity [Sabre is a study partner], Expedia and Orbitz the clear favorites. These three sites were also the leaders in a recent *New York Times* list of the most popular travel sites. 29% of respondents visited the websites of a destination, such as a national tourism office. The number of respondents who said they had visited dedicated eco-tourism sites, 7.2%, corresponded almost exactly to the number who cited eco-tourism as a reason for traveling (see Chart 15).

Many eco-tourism sites — such as International EcoTourism Society, EcoTourism at Conservation International and Ecotourism.net — offered respondents information about

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destinations and routes, as well as online communities. Independent online booking sites like rezhub.com and wholetravel.com are very popular with dedicated eco-tourists and the eco-conscious globetrotter. Yet an increasing number of mainstream, sales/booking oriented sites have begun catering to the green travel and eco-tourism market using their own “environmental friendliness” criteria — Travelocity, Orbitz, Ecotourism and Kayak are good examples.

Based on a recent Travelocity survey in which 59% of respondents said a “green” rating would have some influence in their hotel selection, the travel site launched a “green directory” of eco-friendly hotels and destinations. The directory highlights properties and destinations “making changes for a better tomorrow.” To show discriminating eco-tourists that Travelocity’s initiative is a trusted resource that goes beyond “greenwashing” to offer meaningful, sustainable travel choices, Travelocity is also an active member in the Partnership for the Global Sustainable Tourism Criteria (GSTC Partnership) established in 2008 by the Rainforest Alliance and the United Nations.¹

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






Sites specific to popular eco-travel destinations like EcoTourism Panama, Costa Rica Ecotourism.com and EcoTourism Australia.com were also mentioned by respondents.

1) travelmole.com, “Sustainable Travel” January 26, 2009

Travel Companions

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		55.5%	929
I traveled alone		28.7%	481
With friend(s)		28.7%	480
With family		25.8%	432
In a tour group		3.9%	65
		Valid Responses	1675
		Total Responses	1675

“Significant others” were the most frequent travel companions for respondents — over half said they had traveled with partners/spouses on their most recent vacation. Just under a third traveled alone, 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 percent of vacationers took “solidays” in the past year, with would-be companions bearing the brunt of the global recession.¹


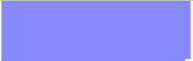





Traveling alone is particularly popular with younger travelers in the 18-to-35 group, who make up the largest sector of solo travelers, accounting for 35%. Less than 4% of respondents had taken their most recent vacation with an organized tour group.

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

Travel Motivators

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

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

Response	Chart	Frequency	Count
Visit friends/family		54.6%	915
Desire to explore the destination		49.4%	828
Geographical location		47.7%	799
Activities available there		40.4%	677
Price/good deal		37.1%	621
Environmental/sustainable/socially responsible considerations		16.0%	268
Other		9.0%	151
		Valid Responses	1675
		Total Responses	1675

Again, the main driver for travel destinations was visiting friends and family, at almost 55% of respondents. But for almost half the respondents, other destination-specific factors — appeal of the destination, its geographical location and available activities — weighed significantly.

A not-insignificant 16% minority of respondents cited environmental and social responsibility as main influences in their choice of destination.

However, that was not of primary importance for the majority of respondents; more than 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 the advertising, marketing and brand strategy firm 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



















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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Trip Purpose – Detailed

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		57.9%	970
Enhance relationship with spouse/partner/family/friends		45.1%	756
Enjoy nature		34.4%	576
Cultural experience/understanding		30.7%	514
Personal enrichment		30.6%	512
Adventure		21.3%	356
Education		12.8%	214
Romance		12.5%	210
Photography/arts		12.4%	208
Network or make new friends		10.9%	183
Physical development/exercise		10.4%	174
Other		9.9%	166
Eco travel		7.0%	117
Sports such as fishing, golf, sailing or tennis		6.8%	114
Spiritual pursuit		6.7%	113
Therapeutic/health/spa		5.0%	83
Leave the destination better (volunteered, donated, participated in environmental work, etc.)		3.1%	52
Medical treatment		1.3%	21
		Valid Responses	1675
		Total Responses	1675

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. Vacation

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travel retained its traditional image as a restful and restorative activity. 57.9% of respondents mentioned rest and relaxation as the purpose, or one of several purposes of their vacation travel, and 45.1% acknowledged the bonds that travel can forge in a relationship.

One of the biggest destination-specific factors in vacation travel was the enjoyment of nature (34.1% of respondents) and adventure (21.3%). Adventure travel is one of the fastest-growing sectors in the travel industry. An \$8 billion market in 2000, some travel organizations claim the total is closer to \$30 billion in 2009.¹ The 100 organizations that have joined the [Adventure Travel Trade Association](#) (ATTA) in the first 10 months of 2009 bring its total membership to 500 organizations in 56 countries.















More than 7.0% of respondents said eco-travel was their primary purpose, or one of their primary purposes (in line with the 7.2% who visited eco-travel websites to plan their trip, as shown in Chart 12).

1) "Overview of Market" AdventureEngine.com

Meaning of “Green Travel”

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

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

Response	Chart	Frequency	Count
Eco-friendly hotel (e.g., runs on renewable energy sources, recycles, re-uses linens instead of washing daily, etc.)		86.5%	1428
Uses mass transit and/or renewable energy vehicles		60.4%	997
Sources from local businesses		49.5%	817
Company donates to green/environmental causes		44.9%	741
Carbon neutral offsets built into pricing		38.3%	633
Qualifies for a recognized, third-party green certification		31.5%	520
Authentic interaction with locals		31.1%	513
Cultural		23.1%	382
Includes local volunteer activities		16.8%	277
Guided Learning		9.9%	164
Spiritual content or sacred places		9.3%	153
Interactive		7.2%	119
Other		4.3%	71
Peer-related learning		3.7%	61
		Valid Responses	1651
		Total Responses	1651

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

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community, e.g., outdoor exploration, volunteer activity, educational activities or cultural or spiritual immersion?

For 86.5% of respondents, the 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 new green programs.



Sustainable transportation was the second-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. Between 31.5% and 44% of respondents felt that the general sustainability policy of a travel vendor — from supporting environmental causes to pricing with carbon offsets and third-party green certification — made it green.

For a sizable minority of respondents, almost a third — possibly corresponding to the 20-30% of respondents on the “extremely”/“true-blue green” end of the eco-conscious spectrum — social and cultural factors like “authentic interaction with locals” were important. Less than 10% prioritized spirituality or sacredness, but sacred travel — also known as metaphysical tourism or spiritualized travel — is a growing travel market niche, both in the U.S. and internationally.

Vacationed “Green” During Past Year

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		54.3%	893
No		45.7%	751
Not Answered			7
		Valid Responses	1644
		Total Responses	1651

A slim majority of respondents “walked the walk” when it came to green travel, with 54.3% saying they had taken a vacation in the last 12 months that included green components cited in Chart 16.




The July 2009 travelhorizons survey found that while consumers believe businesses had a responsibility in making travel more sustainable, 54% 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

Paying to Lessen Travel Footprint

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
0% - 5% more than the cost of a similar, conventional trip		74.0%	644
6% - 10% more		20.0%	174
> 10% more		6.0%	52
Not Answered			38
		Valid Responses	870
		Total Responses	908

Three-quarters of respondents did not pay much more than they would for conventional travel to reduce their environmental footprint. A fifth of respondents did, however, paying between 6% 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 a low ceiling on the additional costs of green travel. The travelhorizons survey found that among consumers willing to pay higher for eco-friendly options, 39% would pay as much as a 5% premium to an environmentally responsible supplier — about as many would pay between 5 and 9% 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

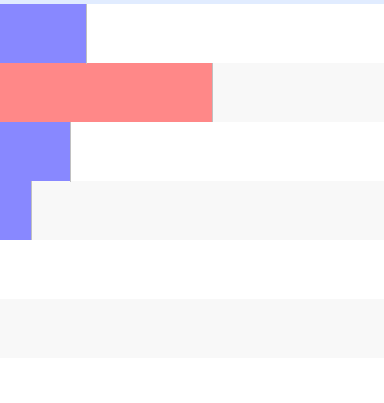
1) "Travelers Unwilling to Pay More For Green Travel" *Sustainable Travel* blog, August 26, 2009
http://blog.sustainabletravel.com/travelers_unwilling_to_pay_mor.html

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>

Percent of Travel that Was Green

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 green elements or features?

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








Response	Chart	Frequency	Count
0%		20.9%	333
1-25%		53.3%	850
26-50%		16.7%	267
51-74%		6.3%	101
75-99%		1.6%	25
100%		1.3%	20
Not Answered			21
		Valid Responses	1596
		Total Responses	1617

Half of respondents said that up to a quarter of their travel was greener than it was in the previous year, and more than half said that only a quarter or less of their travel was “greener” than travel in the previous year. For less than 8% of respondents, more than half of travel was greener than it was the year before, and more than 20% of respondents said there was no change in the amount of green travel they did in the last 12 months.

How Travel Helps the Environment

What do you think are the most important positive contributions of travel towards the environment? (Select up to three)

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

Response	Chart	Frequency	Count
Supports local communities and economies		59.6%	963
Educates traveler on environmental diversity		45.9%	742
Promotes a culture that values the environment		44.3%	717
Creates advocates for endangered locations, species, cultures		43.1%	697
Highlights the importance of natural parks and habitats		41.4%	670
I think travel is neutral – it does as much harm as it does good		18.2%	294
I don't think travel has any positive effect on the environment		5.2%	84
Other		2.0%	32
		Valid Responses	1617
		Total Responses	1617

Almost 60% of respondents felt that the most important direct benefits of travel were 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.

Less than 24% of total respondents did not feel that travel had 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 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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Green Travel Behavior

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		84.6%	1368
I recycled		76.3%	1233
I re-used hotel sheets and towels to conserve resources		75.3%	1217
I ate the local’s cuisine		69.9%	1130
I conserved water		64.6%	1044
I brought and used a reusable shopping bag		63.3%	1024
I brought and used a reusable water bottle		61.1%	988
I traveled by train or other public transportation		48.7%	788
I walked and/or bicycled to most activities		44.2%	714
I purchased locally made crafts		42.0%	679
I ate vegetarian meal(s)		31.4%	508
I rented a high-mileage, more fuel efficient car		23.4%	379
I researched and booked “greener” accommodations		19.0%	307
I have offset my travel		12.6%	203
I participated in a volunteer project while on my vacation		7.2%	117
I participated in an environmental conservation project while on my vacation		5.1%	83
Other		3.6%	58
		Valid Responses	1617
		Total Responses	1617

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

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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 when passengers book 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.

Attentiveness to Environmental Issues While Traveling

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		55.1%	879
No change – same as always		43.4%	692
Less conscious of the impact your actions had on the environment		1.5%	24
Not Answered			22
		Valid Responses	1595
		Total Responses	1617

While more than 43% 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 environmental awareness than the general population — and the more critical factor is how that awareness is (or is not) translating into green 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, according to the travelhorizons survey. The same study showed a 42% increase in familiarity with the term “carbon footprint” to 54%, a figure almost equal 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>

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Environmental Concerns Impact on Travel

In the past 12 months, how have your environmental concerns impacted your discretionary travel (vacation, visiting friends/family) decisions, if any?

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

Response	Chart	Frequency	Count
I'm concerned, and did something about it (e.g., carbon offset purchase)		31.7%	512
I'm concerned, but traveling greener costs more and I couldn't afford the difference		11.9%	193
I'm concerned, but wasn't sure what to do		31.5%	510
I'm not really concerned either way; I traveled the same as always		14.7%	237
I'm so concerned that I traveled less because of it		10.1%	164
Severe concern: I considered giving up discretionary travel entirely		1.4%	23
		Valid Responses	1617
		Total Responses	1617

Environmental concerns affected discretionary travel decisions for more than 43% of respondents. Most of those offset the environmental impact of their travel. Less than 12% of respondents had environmental concerns about their travel but either could not afford to reduce/offset it or, in the case of almost a third of respondents, did not know how. Less than 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](#) 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

Choosing Restaurant for Sustainability Commitment

While traveling over the past 12 months, did you select a restaurant primarily because of its sustainability commitment?

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

Response	Chart	Frequency	Count
No		68.7%	1100
Yes		31.3%	502
Not Answered			1
		Valid Responses	1602
		Total Responses	1603

Environmental sustainability was the *primary* factor in choosing a restaurant for almost a third of respondents. More diners are aware that our nation's food system presents unsustainable environmental costs. According to The Center for Urban Education about Sustainable Agriculture, the average American foodstuff travels 1,500 miles from farm to plate. Consumers are increasingly concerned about the environmental footprint of their dining experience, as well they should be. Restaurants are the largest single user of electricity within the retail market space, and each year the average restaurant generates 100,000 pounds of garbage and uses 300,000 gallons of water. Diners are also increasingly seeking out organic food. Hence, the green restaurant niche is booming.

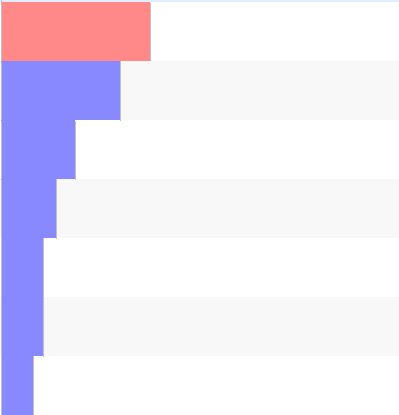
“There is a grass roots explosion of interest in sustainability among restaurant owners, suppliers and customers over the last two years,” says Michael Oshman, president of [Green Restaurant Association](#) (GRA). In fact, the GRA tripled its memberships in 2007 and again in 2008.¹

1) Quoted in “A Profitable Helping of Sustainability” Bill Roth, *Entrepreneur*, June 27, 2008

Restaurant Selection

How did you find out about the restaurant?

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
















Response	Chart	Frequency	Count
Researched on the Internet		33.8%	169
Referral from a friend		26.6%	133
Happened to see it		14.6%	73
Found in a guidebook		9.4%	47
Referral from the hotel		6.2%	31
Other		5.8%	29
It was in the hotel where I stayed		3.6%	18
Not Answered			6
		Valid Responses	500
		Total Responses	506

Online presence is important for restaurants to reach green diners. Of the respondents in Chart 25 for whom environmental sustainability was the primary factor when they selected a restaurant, over a third found out about their choice on the Internet. A quarter of respondents were primarily influenced by traditional referrals from friends, hotels and guidebooks, and for 3.6%, green dining was a matter of location — the restaurant happened to be in the hotel where they were staying.

Restaurant Environmental Initiatives

Which restaurant environmental initiatives are most important to you (pick your top five):

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

Response	Chart	Frequency	Count
Locally sourced food and beverages (i.e., supports local economy, carbon reduction)		73.3%	1164
Recycling of cardboard, paper, cans, and glass		61.0%	969
Organic foods		41.6%	660
Water efficiencies (no bottled water, water-efficient equipment)		35.8%	569
Sustainable seafood		31.7%	503
More humane meat, eggs and dairy		31.4%	499
Vegetarian and / or vegan options		30.2%	479
Energy efficient kitchen and equipment		27.5%	436
Energy efficient dining room lighting		20.8%	331
Compostable to-go cutlery and/or unbleached to-go containers and napkins		20.5%	326
Compost		17.4%	276
Organic beverages (juice, beer, wine)		13.7%	217
Grease converted to biodiesel		13.0%	207
Carbon monitoring and mitigation offsets		3.9%	62
Other		2.8%	44
		Valid Responses	1588
		Total Responses	1588

Almost 75% of respondents were “locavores” — locally sourced food and beverages were more important than any other environmental initiative for the respondent panel — when asked about how a restaurant should be run sustainably. The food service industry newspaper, *Nation’s Restaurant News*, picked locally grown food as one of its top five restaurant dining predictions of 2010. In fact, dishes made from locally sourced ingredients, even from on-site restaurant gardens, are becoming more and more prominent on menus to attract sustainably oriented diners.

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Restaurant News spotted the trend even at fast-food franchises: the Burgerville chain has boosted sales with a monthly seasonal ingredient offer that featured local cranberries in November.¹

Recycling was also an important initiative for most respondents. For fast-food restaurants and other restaurants offering to-go orders — which produce the majority of non-food waste in the food service industry — one in five respondents had significant concerns about the biodegradability of containers, napkins and cutlery. Chains have responded with a variety of recycling programs. McDonald's was an early leader in fast-food-chain recycling. In 1989, it switched non-recyclable styrofoam polystyrene hamburger packaging to recyclable paper and cardboard boxes. The chain also started using unbleached carry-out bags and other green-friendly packaging. However, because there are no national recycling regulations in the U.S., fast-food chains focus on compliance with local community recycling programs, which vary dramatically and often do not exist.



Over 40% of respondents cited organic food as important. Over a third had concerns about the restaurant's water conservation efforts, while less than a third showed more specific and educated awareness about a restaurant's food selection — humanely/sustainably farmed meat, seafood, eggs and dairy, for example. Approximately a quarter of respondents expressed significant concern about a restaurant's energy efficiency — evidenced by the increasing popularity of Green Restaurant Association certification.

1) "Five dining predictions for 2010" *Nation's Restaurant News*, Nov. 20, 2009

Use of a Travel Agent

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
No		77.7%	1220
Yes		22.3%	351
Not Answered			17
		Valid Responses	1571
		Total Responses	1588

With a wealth of information and self-service, discount, sustainable travel choices a click away, a little more than one in five respondents had made a travel purchase from a travel agent in the last 12 months. In the Internet age, the role of the traditional travel agent has changed dramatically.

Unable to compete directly with the Travelocitys and Expedias of the world, traditional travel agents have moved into 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.¹ Agents specializing in the gay travel market have also continued to do well, as have those who put together adventure, wildlife, and/or cultural vacations.

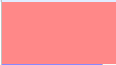




As discerning eco-travelers travel to more developing economies, the customer service and human interaction offered by a traditional travel agent will hold value for a significant percentage of travelers for the foreseeable future.

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

Travel Agents Educated in Green Travel

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
I don't use the services of travel agents		29.6%	464
Was not aware of it, but it would favorably influence my choice of travel agents		26.2%	411
Yes		18.2%	286
Not aware of it, and it's unlikely to be an influence		16.1%	253
I don't use travel agents now, but I would if the company were a "green" expert		9.9%	155
Not Answered			19
		Valid Responses	1569
		Total Responses	1588
















Though Chart 28 showed that most respondents did not use travel agents for their travel purchases, the idea of "green travel agents" does hold appeal for them. 54.3% of respondents said that they would use the services of a travel agent trained by a certification body like ASTA to offer sustainable travel choices. Significantly, at least 42.3% of respondents were not aware of such programs, suggesting marketing is the main challenge for ASTA and other sustainable travel agent certification programs.

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.

Motivators for Hotel Selection

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

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

Response	Chart	Frequency	Count
Price or special offers		77.5%	1203
Location		67.2%	1043
Quality		47.4%	736
Location near attractions		36.9%	573
Online review of property		34.1%	530
Brand or hotel's reputation		33.5%	521
Free Internet in room		32.8%	510
The hotel's environmental program		22.7%	353
Reward program / points		21.0%	326
Green / sustainable dining options on premises		14.1%	219
Fitness facilities		13.0%	202
Certification as a green property		12.9%	201
Pool		10.9%	170
Advertising in green / alternative media		5.8%	90
Other		5.5%	85
		Valid Responses	1553
		Total Responses	1553

Traditional criteria were the most important for respondents in selecting a hotel. Price is by far the most important factor, 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 and green certification were factors for some respondents, but not as important as a hotel's rewards program.

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22% of respondents cited environmental practices as a “top five” criterion, slightly more than the 19.1% who identified themselves as extremely eco-conscious in Chart 1a. For reference, 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 offered by a popular travel booking site.¹

The substantial number of travelers seeking more environmentally responsible hotel and resort accommodations 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.

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 Seals, 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









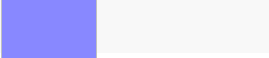

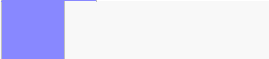

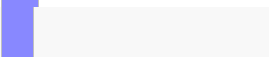
1) [travelmole.com](#), “Hotel” November 3, 2009

2) “Going green doesn’t equal making green” Medill Reports - Chicago, Northwestern University Nov. 19, 2009

Hotel Environmental Initiatives

What hotel environmental initiatives are most important to you (pick your top five):

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

Response	Chart	Frequency	Count
Recycling		68.4%	1062
Energy efficiency		66.0%	1025
Water efficiency		59.8%	928
Non-toxic cleaning chemicals		45.2%	702
Eco friendly soaps, shampoos, conditioners		45.1%	700
Indoor air quality		40.1%	622
Occupancy controls to prevent heating/cooling when rooms are unoccupied		39.7%	616
Built with eco-friendly materials		22.6%	351
Involvement in local environmental efforts		22.5%	350
Eco-friendly furnishings		14.5%	225
Carbon reduction or offsets of hotel stay		7.3%	114
Carbon reduction or offsets of guest travel		6.1%	95
Other		2.6%	40
		Valid Responses	1553
		Total Responses	1553

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. And an additional 39.1% of the responses mentioned "smart" controls that kept rooms from being heated and cooled when unoccupied. Also important were materials and atmospheric conditions that guests come in contact with: non-toxic cleaning materials, environmentally friendly soaps and shampoos, and indoor air quality were cited in 40.1% to 45.2% 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).

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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 of 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*

Participation in Green Hotel Initiatives

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
Always		85.7%	1309
Sometimes		13.4%	205
Rarely		0.5%	7
Never		0.5%	7
Not Answered			25
		Valid Responses	1528
		Total Responses	1553

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 over 86% saying they would always 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% of 66,000 guests questioned — who were aware of their hotels' conservation programs — said they participated in them during their stay. For example, they recycled or participated 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 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” GlobeSt.com, March 10, 2008

Importance of Hotel's Green Efforts

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		38.8%	603
More important than star rating		29.9%	464
Least important priority		29.9%	464
More important than price		9.9%	154
More important than location		7.5%	117
I didn't stay in a hotel in the past year		7.3%	114
Most important priority		5.6%	87
		Valid Responses	1553
		Total Responses	1553

The panel of respondents was 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

Paid for Green Hotel Stay

In the past 12 months, did you pay additional to stay at a greener hotel?

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





Response	Chart	Frequency	Count
No		61.5%	933
I don't know ... it was hard to tell		25.2%	382
Yes, a little more, about \$10-20 per night		11.5%	174
Yes, a significant amount more, about \$50 per night		1.8%	28
Not Answered			36
		Valid Responses	1517
		Total Responses	1553

Chart 34 seems to indicate, in line with other data, that green money trumps green, sustainable business. Most respondents said that they did not pay extra to stay at a greener hotel.

Even though green is coloring the marketing strategies of hotels and businesses throughout the travel industry, it appears that hotels could still do a better job. The recent travelhorizons survey, conducted among the general public, found that less than one-third (29%) of those questioned said it was easy to find out about environmental policies and initiatives of travel service suppliers.¹

A minority of only 13.3% said they were aware of paying more to stay at a greener hotel — roughly in line with the number in other questions (see in Charts 30, 31 and 33) who prioritized a strong and identifiable green program in selecting a hotel.

In spite of the “green premium,” most green hotel initiatives also save money. The point of having guests re-use towels and sheets is to run laundry facilities less. CFL bulbs and energy-efficient heating and cooling systems reduce the energy bill. Water recycling systems — built into newer, purpose-built green hotels — also save money. While there is an initial investment in these environmentally sensitive systems, they cost less to operate than their conventional counterparts, and could eventually differentiate green hotels by allowing them to offer lower rates.² According to the Green Hotels Association (GHA), hotels can save over \$6.50 a day per occupied room on laundry by using a towel-rack hanger and the sheet-changing card being offered by the GHA. An early user of the cards, the Sheraton Rancho Cordova, reported savings of 5% on utilities alone.³












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- 1) "Travelers Unwilling to Pay More For Green Travel" *Sustainable Travel* blog, August 26, 2009
- 2) "Is Corporate Travel Going Green?" WalletPop.com, November 11, 2009
- 3) Press release, Green Hotels Association, September 25, 2002

Researching a Green Hotel

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		54.5%	847
Hotel's print or Internet ad indicating green initiative		24.0%	372
Travel website		22.8%	354
Guidebook		14.9%	231
Magazine and newspaper articles		11.9%	185
Environmental group (website, etc.)		10.0%	155
Other		9.9%	153
Third-party certifier		8.9%	138
Online travel agent, or local retail travel agent		3.3%	51
		Valid Responses	1553
		Total Responses	1553

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 [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.

Nearly a quarter of respondents indicated that they had taken a green hotel's advertising into account in assessing its environmental sustainability, making advertising an important tool for reaching this market. Third-party travel websites and guidebooks were cited by roughly 15-20% of respondents as a means to identify green business practices in a hotel.

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Throughout this survey, there is a core of highly eco-conscious consumers represented by roughly 10% of respondents (less than the 19.1% who identified themselves as “extremely” eco-conscious in Chart 1a) who take involved, proactive, sustainable steps in their choices as consumers. In this chart, it is that group who are likely represented by the respondents who evaluated a hotel’s sustainability program through an outside environmental group or third-party certifier.

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

Trust of Source's Green Rating

How much do you trust that source? (If you did not use any resources, please skip this question.)

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

Response	Chart	Frequency	Count
I always check another source to make sure		28.1%	330
I wish there was a better resource that I could trust		24.9%	292
I'm skeptical of all green claims		23.9%	281
I believe the one source I check		23.1%	271
Not Answered			379
		Valid Responses	1174
		Total Responses	1553

While a hotel's own marketing materials were the primary means to reach "green guests," respondents did not necessarily trust the vendor's own sources. Over 75% of respondents expressed varying degrees of skepticism about reports of a hotel's green practices in its own websites and brochures. 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.¹

A quarter of respondents said they wished there was "a better resource I could trust," indicating the need for a trusted, third-party or user-generated source of reviews for sustainable vendors in the travel industry, along the lines of CNET or Yelp. 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.²

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

2) "Consumers Skeptical of Green Travel Claims" Sustainable Life Media, March 29, 2009

Green Certifications

Please name the “green” travel or hospitality certifications that you are aware of. If you do not know of any, just skip the question.

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

Response	Chart	Frequency	Count
		90.9%	1412
Green Globe		0.8%	13
Green Leaf		0.1%	2
green seal		0.5%	7
LEED		2.1%	32
LEED Certification		0.2%	3
LEEDs		0.2%	3
none		0.1%	2
Rainforest Alliance		0.1%	2
STEP		0.1%	2
Travel Green Wisconsin		0.1%	2
<i>Other Responses</i>		4.7%	73
		Valid Responses	1553
		Total Responses	1553

90.9% of respondents did not answer the question because they were not aware of any green travel or hospitality certifications. Even more than the 24.9% of respondents who said there was a better, trusted source to evaluate green claims in Chart 36, the lack of familiarity with green travel and hospitality certifications reflects the absence of a trusted, appealing 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

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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

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.³



- 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) “Stamp of approval” Richard Hammond *The [Guardian \(UK\)](#)*, March 28, 2007

Cruise Travel

Past Cruise Experience

Have you ever taken a cruise vacation?

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

Response	Chart	Frequency	Count
No		57.9%	889
Yes		42.1%	646
		Valid Responses	1535
		Total Responses	1535

While over half of respondents have never taken a cruise vacation, 42.1% have. Cruising is increasingly popular among vacation travelers — since 1970, the industry has grown 1000%, and it continues to do record business. In fact, according to the Environmental Protection Agency, the cruise industry has grown at double the rate of the rest of the travel industry.¹

However, a typical 3000-passenger ship generates 1 million gallons of “gray water,” 210,000 gallons of sewage, 25,000 gallons of oily bilge water, 100 gallons of hazardous or toxic waste, 50 tons of garbage and solid waste, and the equivalent [diesel exhaust emissions](#) of thousands of cars. While all members of the Cruise Lines International Association, representing more than 90% of the global cruise industry, have a policy not to dump untreated sewage anywhere, and to release bilge water only if it meets oil content standards, the fact remains that a ship like Royal Caribbean’s *Explorer of the Seas* discharges much of its *daily* effluent of 40,000 gallons of sewage and 19 tons of solid waste directly into the environment directly — or indirectly as incinerator smoke and ash.² Much of the dumping is in violation of national and state regulations, prompting federal lawsuits and U.S. Coast Guard and Environmental Protection Agency crackdowns against cruise lines.

In an effort to dovetail the popularity of cruises with the increasing environmental awareness of today’s travelers, cruise lines are spending millions of dollars to upgrade fleets to reduce their emissions and overall environmental impact, saving money on fuel and energy costs over the long term. On each of Holland America’s ISO14001-certified ships, the line has installed black water treatment systems, worked with their supply chain to reduce their 8 tons of waste generated daily, eliminated waste going overboard, “eco-educated” their staff and put environmental officers on every cruise. Celebrity Cruise’s *Celebrity Solstice* has 216 solar panels onboard to power elevators and 7,000 lights. On Disney Cruise lines, laundry facilities use the 280 tons a day of water generated every day from the air conditioning systems, while excess heat powers evaporators [turn 1,200 tons of seawater into potable water](#) each day.³



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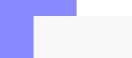

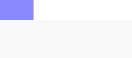
- 1) "Federal Agencies Raise Alarm About Cruise Sewage" October 28, 2009 FOX News
- 2) "Getting a Grip on Cruise Ship Pollution" report, Friends of the Earth, December 1, 2009
- 3) "7 Ocean-Friendly Eco Cruises Hitting the High Seas" Treehugger.com, June 3, 2009

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Cruise Lines Used

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
Royal Caribbean		31.4%	205
Carnival		30.2%	197
Other		29.4%	192
Holland America		25.9%	169
Norwegian (NCL)		22.7%	148
Princess		19.9%	130
Celebrity		16.7%	109
Disney Cruise Line		5.2%	34
Costa		4.6%	30
Azamara		0.9%	6
		Valid Responses	652
		Total Responses	652

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

Every cruise line mentioned by respondents boasted green credentials. The leader with respondents, 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. Royal Caribbean also uses [biodiesel](#) to power its ships and actually 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 Administration \(NOAA\)](#).




[Costa](#), the “first Green Cruise Line of Europe,” was the first to earn a Green Star notation environmental award in 2005.¹

1) “7 Ocean-Friendly Eco Cruises Hitting the High Seas” Treehugger.com, June 3, 2009

Future Cruise Travel

Are you considering a cruise vacation in the future?

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

Response	Chart	Frequency	Count
Yes		29.4%	450
No		41.1%	629
Maybe		29.4%	450
Not Answered			1
		Valid Responses	1529
		Total Responses	1530

Cruises were not the most popular travel choice for respondents: less than 30% said they were definitely considering a cruise vacation; another 29.1% said they might consider one; and over 40% said a cruise was not a consideration in their vacation planning.
















Cruising has not been considered the most responsible choice by green travelers, with per-passenger carbon dioxide emissions almost 7 times higher than a jetliner for a trip from Miami to Grand Cayman.¹ A gallon of fuel moves a big ship like the *Queen Elizabeth II* approximately 45 feet. The industry has made substantial investments to decrease its considerable environmental footprint, so while technological and operational improvements are ongoing, it faces an equal challenge in marketing to green its reputation.

1) "A Supposedly Green Thing I Might Do Again" By *Nina Shen Rastogi*, *Slate*, Tuesday, September 1, 2009

Cruise Line Environmental Initiatives

What cruise line environmental initiatives are most important to you (pick your top five):

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

Response	Chart	Frequency	Count
Recycling		67.3%	605
Energy efficiency		55.4%	498
Water efficiency		54.5%	490
Organic and / or sustainable food onboard		38.9%	350
Non toxic cleaning chemicals		38.5%	346
Eco-friendly soaps, shampoos, conditioners		35.8%	322
Indoor air quality		33.9%	305
Occupancy controls to prevent heating/cooling when rooms are unoccupied		24.9%	224
Carbon reduction or offsets of ship operations		21.6%	194
Involvement in local environmental efforts		17.9%	161
Carbon reduction or offsets of guest travel		13.8%	124
Offers volunteer shore excursions		12.2%	110
Built with eco-friendly materials		9.9%	89
Eco-friendly furnishings		9.5%	85
Other		4.8%	43
		Valid Responses	899
		Total Responses	899

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 and energy and water use 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. And as with their preference in hotels, materials and atmospheric conditions that that guests come in contact with were important

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to respondents — non-toxic cleaning materials, environmentally friendly soaps and shampoos and indoor air quality were cited in 33.5% to 38.5% of responses.

When it comes to cruise lines, however, organic and sustainable food is important to respondents, more so 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 almost 40% 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.



In a nod to the large environmental footprint of an operating cruise ship, more than 20% of respondents cited carbon reduction or carbon offsets as green initiatives that were important to them, and another 13.8% cited carbon reduction/offsets of guest travel, 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.⁵

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

Use of Cruise Lines' Green Options

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
Always		82.6%	720
Sometimes		15.6%	136
Rarely		1.3%	11
Never		0.6%	5
Not Answered			27
		Valid Responses	872
		Total Responses	899

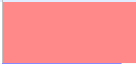






Almost every respondent said that he or she would participate in in-room green programming options offered by the cruise line, at least sometimes, if they were provided (with over 82.6% saying they would always participate). While convenience is again strong motivator — not getting sheets and towels exchanged required minimal effort from guests — most green programs are opt-in rather than default. For example, Princess Cruise Line asks passengers to leave towels on the floor if they want them replaced, and to hang them on racks if they wish to use them another day.

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Importance of Green When Selecting a Cruise Line

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
I didn't take a cruise in the past year		31.8%	286
More important than brand		27.9%	251
More important than star rating		22.1%	199
Least important priority		20.7%	186
Most important priority		9.2%	83
More important than price		8.9%	80
More important than destination/ports		4.8%	43
		Valid Responses	899
		Total Responses	899

The panel of respondents was divided on the importance of “green” programs and credentials when selecting a cruise line. For 27.9%, “green” is more important than brand. And 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).

9.2%, less than half as many, said a cruise line’s sustainability program was their *most* important priority. 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 — Royal Caribbean entered a guilty plea to charges of dumping thousands of gallons of oily bilge, dry-cleaning fluids and photo-developing chemicals at sea after a five-year federal investigation. 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

Business Travel

Traveled for Business

Have you traveled on business in the last 12 months?

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

Response	Chart	Frequency	Count
Yes		45.1%	684
No		54.9%	834
		Valid Responses	1518
		Total Responses	1518

Less than half of respondents (45.1%) had traveled on business in the last year. Despite a 1.2% increase in overall air travel from 2008-2009, the shaky global economy has caused business to cut back on travel, according to the IATA, especially within Europe and North America¹

“We are entering an age of visible austerity with regards to business travel,” said 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



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

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

Environmental Awareness During Business Travel

When you traveled on business in the past 12 months, were you:

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

Response	Chart	Frequency	Count
No change – same as always		52.5%	356
More conscious of the impact your actions had on the environment		43.8%	297
Less conscious of the impact your actions had on the environment		3.1%	21
I didn't travel for business		0.6%	4
Not Answered			9
		Valid Responses	678
		Total Responses	687

Just over half of respondents said they were neither more nor less conscious of their impact on the environment when traveling on business in the last 12 months. Close to half (43.8%) of responding business travelers, however, were more conscious of the impact their actions had on the environment. Only a handful of respondents were less conscious of their business travel's environmental impact during the last year.

The substantial number of respondents who were more conscious of their business travel's impact should be seen in light of the number of businesses arranging greener travel for them. A recent *USA Today* article noted that more and more companies are booking rooms in green-certified hotels. Oracle and accounting giant [KPMG](#) are among the organizations that now check the sustainability programs of the hotels their personnel use. Florida, New York and California have state-level green certification for hotels, and have employees stay in them when on state business.




“The idea is: If two hotels are equal, you should choose green,” says Patricia Griffin of Green Hotels Association.¹

1) “More companies want employees to stay in ‘green’ hotels” Roger Yu, *USA Today*, November 9, 2009

Company Policy Regarding Green Travel

When traveling on business, does your company's travel policy recommend that you consider staying at hotels that have green programs in place?

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

Response	Chart	Frequency	Count
No		75.3%	508
Yes		15.3%	103
I don't know		9.5%	64
Not Answered			12
		Valid Responses	675
		Total Responses	687

The trend towards using green hotels for business, noted in the previous chart, is still emerging. Relatively few business travelers (15.3%) reported that their companies recommended staying at hotels with green programs. More than 75% of companies employing respondent business travelers 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.

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




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

Workplace Green Travel Policy

When traveling on business, does your company's travel policy recommend that you consider booking your travel (air, car, etc.) with the environment in mind?

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

Response	Chart	Frequency	Count
No		71.8%	481
Yes		19.1%	128
I don't know		9.1%	61
Not Answered			17
		Valid Responses	670
		Total Responses	687

Less than 20% of business travelers worked for companies that recommended environmental considerations in business travel (booking plane tickets, rental cars and other modes of travel). Almost 72% of companies did not make eco-conscious travel recommendations to their business travelers. Four in five companies (79%) in the 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 may supplant the greening business travel 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 company-wide policies to reduce travel or are more closely monitoring travel. The study also found that 87% of

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meetings with people not located in the same office are now conducted virtually by phone or a Web meeting.⁶

UK Telecommunications leader Vodafone required its employees to justify why they need to fly anywhere for business, instead of using one of the company's 200 teleconferencing centers. The policy reduced the Vodafone's air travel by 20% in its first year.⁷

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) "The Greening of Travel and Tourism, from Asia to Alabama" Joel Makower, Two Steps Forward (blog), November 2, 2007

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Business vs. Leisure Travel

Which if any of these statements do you agree with?

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


Response	Chart	Frequency	Count
My “greener” choices are about the same on business and leisure travel.		75.1%	516
I select “greener” options when on vacation, even if more expensive, and less expensive options when traveling on business.		15.4%	106
I select “greener” options when traveling for business, even if more expensive, but then choose the least expensive option when traveling for leisure.		8.9%	61
		Valid Responses	687
		Total Responses	687

Most respondents — over 75% — made the same, environmentally conscious choices whether traveling for business or leisure. 15.4% prioritized and paid for “greener” options in their vacation travel than business (where keeping costs low was a priority); while for slightly over half as many it was the other way around. Respondents likely take greener vacations than business travel because they have far greater control over their destinations, schedule, choice of suppliers and budget.

Expectations of Green Business Practices

When you attend a business event, do you expect the organizers to implement sustainable practices within the event?

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

Response	Chart	Frequency	Count
Yes		80.7%	541
No		19.3%	129
Not Answered			17
		Valid Responses	670
		Total Responses	687

As more business events “go green,” so do the expectations of attendees. More than 80.9% of respondents said that they expected organizers of business events to make the events at least in part sustainable. Less than 20% of respondents did not expect to see any sustainable practices at business events they attended.

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 Planning

Do you plan or manage business meetings or events?

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




Response	Chart	Frequency	Count
Yes		16.1%	243
No		83.9%	1264
Not Answered			2
		Valid Responses	1507
		Total Responses	1509

16.1% of respondents plan or manage business meetings or events, and answered the next series of questions.

Green Meeting Options

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		72.0%	175
No		21.8%	53
I don't know		6.2%	15
Not Answered			7
		Valid Responses	243
		Total Responses	250







According to respondents who *do* organize or plan meetings and conferences, most companies consider and incorporate environmentally sustainable measures for their events. 72% reported sustainable event planning (e.g., local venues with teleconferencing options); only 21.8% said their companies did not plan any Green Meeting options.

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 green events.

Use of Websites for Green Event Information

Which of these websites, if any, have you visited for more information on green business events? Please mark all that apply.

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







Response	Chart	Frequency	Count
Green Meeting Industry Council		16.4%	41
Meeting Professionals International (MPI)		15.6%	39
Professional Convention Management Association (PCMA)		12.8%	32
Other		8.0%	20
Convention Industry Council		7.2%	18
Blue Green Meetings		7.2%	18
		Valid Responses	250
		Total Responses	250

Green Meeting Industry Council (GMIC) had the leading online resource for green business events among respondents, though Meeting Professionals International (MPI) and Professional Convention Management Association (PMCA) were also popular destinations.

Motivations for Implementing Sustainable Strategies

*What would motivate you to implement sustainable strategies in your next business event?
Mark all that apply.*

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

Response	Chart	Frequency	Count
More information on how to do it		65.6%	164
Cost savings		61.6%	154
Mandate from client or organization		32.0%	80
Climate change		25.2%	63
Regulations		24.8%	62
Other		8.4%	21
		Valid Responses	250
		Total Responses	250

The majority of respondents said what 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. According to 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 they 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

Sustainable Practices

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
Food and beverage (i.e., no bottled water, local food, organic food, composting)		66.0%	165
On-site operations (i.e., recycling, energy efficient business machines, etc.)		62.0%	155
Communication strategies (i.e., electronic vs. paper)		61.2%	153
Transportation options (i.e., shuttles, transit, hybrid vehicles, offsets)		55.6%	139
Destination selection (i.e., close the majority of participants)		45.2%	113
Venue selection		41.6%	104
Accommodation selection		37.2%	93
Exhibitions		19.2%	48
Other		3.2%	8
		Valid Responses	250
		Total Responses	250

The more concrete and directly connected to event operations they were, the more likely sustainable business strategies would be used by respondents. Sustainable food and beverage service was the area most frequently cited by respondents, followed closely by green on-site operations like recycling, and electronic, paperless communication methodologies. The sustainable operations of the venue itself was cited by 41.6% of respondents, sixth among responses.

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, which was last year's total.

Certain cities have put together particularly effective sustainable event infrastructures that appeal to organizations concerned about holding greener conferences. Planners at Oracle chose San



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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

Supplier's Availability of Green Options

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

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

Response	Chart	Frequency	Count
Sometimes		58.1%	137
Yes		22.0%	52
I don't know		12.7%	30
No		7.2%	17
Not Answered			14
		Valid Responses	236
		Total Responses	250

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. One encouraging sign for planners wanting to put on greener events: three times as many respondents found their suppliers were able to meet sustainability requests as those that said their suppliers could not help them with green events.

Per the previous question, 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

Future Plans for Sustainable Practices

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
Immediately		42.8%	101
Within 6 months		16.5%	39
Within the year		13.6%	32
Uncertain		25.4%	60
No		1.7%	4
Not Answered			14
		Valid Responses	236
		Total Responses	250

Sustainability is a strong trend in business events — not in the future, but right now. 42.8% of respondents said they planned on incorporating more green practices in their event planning immediately. Another 30.1% are right on their heels, with plans to green their planning practices in the next six months to a 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% 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

Voluntourism

Have you ever volunteered while traveling?

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

Response	Chart	Frequency	Count
No		74.4%	1120
Yes		25.6%	385
Valid Responses			1505
Total Responses			1505

Volunteering while traveling was an unfamiliar concept for three-quarters of respondents, but over a quarter said they had done some volunteering while traveling. In fact, of the 61.8 million Americans who volunteered in 2008 (26.4% of the adult population, contributing 8 billion hours of volunteer service), approximately 4 million traveled more than 120 miles for service projects, and 1 million traveled internationally.¹

“I think many people are feeling like they are true citizens of the world and they want to make a difference when they travel. It’s so easy to give back as part of a family vacation,” said Nancy Schretter, editor of Family Travel Network.²

Schretter has developed Together for Good, a web-based directory of volunteer projects for individuals and families to “give back” while visiting Mexico, the Caribbean and Central America.

Other *voluntourism* organizations arrange trips to Kenya to help the Maasai, offer opportunities to work in a Peruvian classroom or nature preserve, help Katrina survivors in New Orleans, or camp and work along the Continental Divide Trail.

Together for Good highlights how the travel industry is leveraging the emerging *voluntourism* niche, listing “Helping others on resort vacations” and “Helping others on cruise vacations” among its project categories. Rock Resorts’ new “Give and Getaway program” encourages guests to work on a nearby trail or a farm in scenic, developing regions where the hospitality firm has properties, receiving a room discount in exchange.

Rock Resorts, Ritz Carlton and Fairmont are some of the resorts and high end hotels that are partnering with volunteer groups.



1) volunteeringinamerica.gov

2) “Giving back while you travel” Eileen Ogintz, Tribune Media Services, November 27, 2009 EST

Vacation vs. Business Travel

Did you volunteer during a vacation or business trip? Mark all that apply.

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

Response	Chart	Frequency	Count
Vacation		89.2%	347
Business Trip		25.4%	99
		Valid Responses	389
		Total Responses	389

More than three times as many respondents volunteered during vacation travel than did during business travel. The response reflected the increasing portion of eco-travel that is volunteering in nature — *voluntourism* takes volunteers to destinations where at least part of their vacation is spent working on social or environmental volunteer projects. Respondents also may find it difficult to find the time to volunteer outside of their professional responsibilities and time constraints during a business trip.

However, an increasing number of companies are seeking to engage their executives and team members in voluntourism as part of incentive-based travel programs. According to industry consultant David Clemmons, Founder of VolunTourism.org, “Audiences are absolutely ravenous for new products and services that demonstrate social responsibility — especially a market space, like incentive travel, that has traditionally been marketed as high, high-end.”¹

The *Wall St. Journal* reports that business voluntourism has expanded to the point of executives taking two-week to six-month sabbaticals from their jobs to be philanthropic volunteers. Organizations like CDC Development Solutions, place volunteers with business skills in emerging economies as advisers to development projects. Applications to CDC more than doubled from 2008-2009. The nonprofit recently received 115 applications for a six-month volunteer assignment in Cambodia requiring an M.B.A.²



1) “Incentive VolunTourism - A Potential Growth Area In 2009 & Beyond” VolunTourism.org, April 14, 2009

2) “Charity Begins at Work” Steve Mollman *Wall Street Journal*, November 26, 2009

Continuing Involvement in Volunteer Project

Did you continue to stay involved with the project once you returned home, donating money, etc.?

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

Response	Chart	Frequency	Count
Yes		58.0%	221
No		42.0%	160
Not Answered			8
		Valid Responses	381
		Total Responses	389

Volunteering while traveling/volunteer travel led to a long-term connection between the respondent and the project for which they volunteered. Almost 60% of respondents said that they continued to be involved with the volunteer project once they returned home. Volunteer travel websites are filled with testimonials of how connections with a volunteer project result in continued correspondence, contributing financially or fundraising, and even return trips to sometimes very remote volunteer project locations.

“For the first time, many people who were writing checks felt a real human connection with those in need,” says Kimberly Haley-Coleman, executive director of GlobeAware.org in Dallas.¹



A 2008 msnbc.com-Condé Nast Traveler survey found that 95% of respondents who had taken a volunteer vacation said they would be (somewhat or very) likely to take another.

1) “The value of voluntourism” Rob Lovitt, msnbc.com, Feb. 21, 2008

Interest in Voluntourism

Are you interested in **voluntourism**, i.e., volunteering during a future trip?

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

Response	Chart	Frequency	Count
Yes		59.1%	888
No		40.9%	615
Valid Responses			1503
Total Responses			1503

Volunteer travel is in fact one of the fastest-growing segments in the travel industry today, particularly among the more environmentally aware travelers in the respondent panel. The nearly 60% of this study's respondents who showed an interest in participating in *voluntourism* during a future trip vastly outnumber the 11-15% among the general public with a similar interest reported in other surveys.

Travel providers have quickly embraced this emerging form of travel, seeing that voluntourism is a form of corporate social responsibility as well as another travel revenue channel. Travelocity, for example, partners with GlobeAware, Cross-Cultural Solutions, Take Pride in America and other tour operators that specialize in volunteer-oriented vacations. Typical voluntourism activities include lining a road with oil lamps in Costa Rica, constructing water systems and improving orphanages in Ghana, and tagging sharks off the North Carolina coast.¹ The popularity of volunteer travel has created a variety of packages for travelers to volunteer while on vacation, from "luxury" voluntourism to volunteering on honeymoons, volunteer cruises, or faith-based "cruises with a purpose."

While some trip planners send volunteers to remote regions where only adventure travelers might dare to tread — the mountaineering group Asian Trekking offers trekkers and mountain climbers a dollar-per-pound bounty for waste removed from the slopes of Mount Everest — name-brand, high-end hotels offer a more comfortable brand of voluntourism.

Time magazine recently noted that the Mandarin Oriental in Miami features a two-night package for guests who work removing invasive plants from Everglades National Park or assisting with recycling programs. More than 2,000 vacationers have participated in Ritz-Carlton's "Give Back Getaways" in dozens of locations around the globe since the program was launched in April 2008. The company also offers a "Community Footprints" initiative with half-day programs like assisting local food banks or participating in music therapy for disabled kids. While there is a luxury hotel experience associated with this kind of travel voluntourism, some hotels do charge participants an extra \$40 or more to cover transportation and other costs associated with their work.²



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The current economy's high unemployment rate and record layoffs have actually been a boon for voluntourism. Many international volunteers report that losing their job has actually allowed or even motivated them to take the time to work for others, and travel while doing it.

- 1) “ ‘Voluntourism’: See the World — And Help Conserve It” *Scientific American*, October, 2008
- 2) “Room Service and a Shovel: The Rise of Voluntourism” [Matt Villano](#), *Time Magazine*, Nov. 16, 2009

Influence of Voluntourism Opportunity on Future Vacation Selection

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

		1 (Encourages)	2	3 (Neutral)	4	5 (Discourages)	Total	Mean	Std Dev
Degree of Influence	Count	122	196	515	11	1	845	2.495	0.757
	% by Row	14.4%	23.2%	60.9%	1.3%	0.1%	100.0%		
Total	Count	122	196	515	11	1	845	N/A	N/A
	% by Row	14.4%	23.2%	60.9%	1.3%	0.1%	100.0%		

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













As seen in Table 61 above, 37.6% of respondents indicated that the availability of volunteer activity encouraged their selection of a vacation destination.

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

Use of Websites for Voluntourism Planning

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
VolunteerMatch.org [a study partner]		20.8%	184
Craigslist.org		18.4%	163
Other		17.8%	157
Idealist.org		16.0%	141
Local volunteer center website		13.6%	120
WWOOF.org		7.6%	67
Volunteersolutions.org		5.0%	44
1-800-volunteer.org		4.4%	39
HandsOnNetwork.org		4.3%	38
WiserEarth.org		4.1%	36
Hands on Network		3.1%	27
Servenet.org		1.6%	14
		Valid Responses	884
		Total Responses	884

VolunteerMatch.org [a partner in this study] was the most popular website for respondents interested in volunteer activities (roughly half of the respondents to this survey). Craigslist was a close second, followed by Idealist.org and the websites of local volunteer centers.

Voluntourism Causes

Which of these causes would motivate you to participate in volunteer travel? Mark all that apply.

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

Response	Chart	Frequency	Count
Environmental		70.0%	619
Teaching/mentoring		51.4%	454
Human rights		48.9%	432
Disaster relief		41.5%	367
Animal concerns		40.5%	358
Economic development		35.5%	314
Hunger related		29.2%	258
Scientific pursuits		28.8%	255
Other		4.4%	39
		Valid Responses	884
		Total Responses	884

Environmental causes were by far the category of greatest interest to respondents considering volunteer travel. Environmental causes led socially oriented volunteer activities such as teaching and mentoring, human rights, and disaster relief among responses. Animal concerns, as distinct from environmental activities, were of interest to over 40% of respondents.





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

Willingness to Pay for Voluntourism

How much additional money would you be willing to spend per day on your vacation, if it meant you could also volunteer?

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

Response	Chart	Frequency	Count
I expect to pay less if I volunteer		18.5%	160
Nothing more		37.2%	321
\$1-\$50 per day		36.4%	314
\$51-\$150 per day		6.7%	58
\$151 or more per day		1.2%	10
Not Answered			21
		Valid Responses	863
		Total Responses	884

73.7% of respondents expected either to pay no more or slightly more (\$1-\$50 per day) for a vacation that featured volunteer activities. Less than 20% expected to pay less per day if their vacation revolved around volunteering; less than half that number were willing to pay significantly more (over \$51) per day. Of course, expenditures will vary depending on the volunteer travel destination.

Price continues to be a barrier for volunteer travelers. GeckoGo's "Volunteer Travel Insights 2009" study found that only 30% of respondents spent a total of more than \$1000 (excluding airfare) on their last volunteer trip. 64% of American respondents listed price as one of the top three reasons for selecting a particular trip and country to volunteer in. The top countries of interest for volunteer travelers were in the Americas — Peru (23%) and Brazil (14%) — in countries where they felt their currency will go further and the airfare will be reasonable.

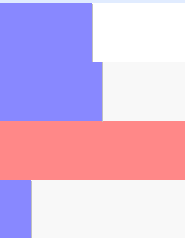
43% of respondents mentioned financial reasons for not volunteering abroad.¹

1) "Volunteer Travel Insights 2009" GeckoGo.com ©2009

Time Allotted to Volunteer Effort

About how much time would you want to dedicate to volunteering during a vacation?

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

Response	Chart	Frequency	Count
Part of a day		22.3%	193
An entire day		25.0%	217
Several days		46.4%	402
The entire trip		6.3%	55
Not Answered			17
		Valid Responses	867
		Total Responses	884

The largest group of respondents to this question expected to make a multi-day commitment to volunteering during a vacation. While a relatively small group (6.3%) were ready to dedicate their entire vacation to volunteering, it's worth noting that many *voluntour* vacations — especially those to scenic or exotic locations — designate some days for non-volunteer, recreational, touristic activities and side trips. Many luxury packages offered to volunteers by hotel chains like Mandarin Oriental and Ritz Carlton feature a work commitment lasting no longer than a day.




GeckoGo's "Volunteer Travel Insights 2009" study found that the duration of international volunteer trips tended to be longer. 51% ended up spending more than a month on their trip and 76% traveled for at least two weeks.¹

1) "Volunteer Travel Insights 2009" GeckoGo.com ©2009

Extension of Trip to Volunteer

Would you consider extending your trip to make time to volunteer?

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



Response	Chart	Frequency	Count
Yes		71.3%	619
No		5.4%	47
Not sure		23.3%	202
Not Answered			16
		Valid Responses	868
		Total Responses	884

Of the 884 respondents who were interested in volunteering during a vacation, the vast majority — 71.3% — would consider extending their trip to do it. Another 23.3% of respondents might extend their trip. Significantly, only 5.4% said they would not, indicating apparent commitment and sincerity among respondents interested in voluntourism who were willing to change their travel plans — and potentially spend more money — to have the chance to volunteer during their vacation.

Travel Companions While Volunteering

When looking for volunteer travel opportunities, do you prefer to participate:

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

Response	Chart	Frequency	Count
Individually or with travel companion(s)		56.5%	481
In a larger group		43.5%	370
Not Answered			33
		Valid Responses	851
		Total Responses	884

A majority of respondents interested in voluntourism are less interested in volunteering with a large group than individually or with their own travel companions. Most organized voluntour travel is with groups of 5-10 or more, however.








For comparison, of respondents to GeckoGo's "Volunteer Travel Insights 2009," the majority of travelers went on their trip alone (57%), while 31% traveled with friends or church groups, and only 9% traveled with a relationship partner. Married or partnered respondents who traveled without their partners preferred shorter volunteer expeditions — only 29% of those respondents wanted an opportunity over one month in length.¹

1) "Volunteer Travel Insights 2009" GeckoGo.com ©2009

Outcomes and Goals of Volunteering

What would be your most important outcome/goal with a volunteer travel experience?

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

Response	Chart	Frequency	Count
Give back		69.9%	618
Discover the community and culture		48.3%	427
More authentic experience		33.1%	293
Meet new people		28.8%	255
Learn about a cause		22.3%	197
Learn about an organization and their mission		20.7%	183
Other		4.1%	36
		Valid Responses	884
		Total Responses	884

Respondents interested in voluntourism are an altruistic group whose primary motivation is to “give back.” Self-developmental aspects of volunteer travel — discovering community and culture, having a more authentic experience and meeting new people — were less important, but still cited by between 28.8% and 48.3% of respondents as desired outcomes of the voluntourism.




77% of volunteer travelers in the GeckoGo study felt that the experience had been very meaningful, and 22% found it meaningful. Volunteer travel was not meaningful for less than 1% of respondents.¹

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

Book Trip on Voluntourism Website?

Would you want the option to book your travel (flight, hotel, etc.) from the same website you are searching for volunteer travel opportunities?

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

Response	Chart	Frequency	Count
Yes		50.4%	435
No		9.6%	83
Not sure		40.0%	345
Not Answered			21
		Valid Responses	863
		Total Responses	884



The idea of being able to book travel on the same website that provided voluntourism opportunities was well-received by respondents. Over half wanted the service, and while another 40% were not sure, less than 10% of respondents said they would not want that option. In the Age of the Internet, travel consumers increasingly expect the kind of turnkey approach that they find on Orbitz or Expedia, where they can book hotel, airline and rental car reservations, as well as tours and attractions. Respondents felt that volunteer tourism plans were closely enough related to travel bookings that they should not have to go to another site to make them.

Online travel site RezHub.com recently added VolunteerTravelHub.com, providing voluntourists with a near-seamless user experience as they find volunteer travel opportunities and then click through to RezHub to book travel arrangements. RezHub also features GreenTravelHub.com, offering environmentally friendly travel options and donating a portion of booking fees to “earth-friendly organizations.”

Charitable Donations While Traveling

In the past 12 months, have you donated money or items to persons or charitable organizations in any of the places where you went on vacation?

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

Response	Chart	Frequency	Count
Yes		42.7%	636
No		57.3%	853
		Valid Responses	1489
		Total Responses	1489







Close to half of respondents donated money or goods while on vacation. In comparison to Chart 57, respondents were more likely to provide money while traveling than to volunteer services — 42.7% of respondents donated to individuals or organizations, but only 25.6% of respondents had volunteered while traveling. Donations need to be taken into context, however — donating may include coins into a coin box or the hands of a needy person.

Experienced eco-travelers enjoy leaving something behind, particularly when they visit developing countries. Opinions differ on the advisability of monetary contributions, material contributions that improve the quality of life in the community — either brought from home or source locally — are always appreciated, from books to pens and paper to basketballs. Travelers also use “micro-philanthropy” strategies to support organizations they encounter while traveling, leveraging social media and social action platforms to raise funds once they return home.

Donation Amount

About how much did you give to persons or charitable organizations while traveling during the last 12 months?

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

Response	Chart	Frequency	Count
\$1 - \$10		4.3%	27
\$11 - \$50		26.0%	162
\$51 - \$100		30.7%	191
\$101 - \$500		27.0%	168
\$501 - \$1,000		7.1%	44
>\$1,000		4.8%	30
Not Answered			19
		Valid Responses	622
		Total Responses	641









83.7% of respondents said they had donated between \$11 and \$500 to individuals or organizations while traveling. Of those, the largest group, 30%, gave between \$51 and \$100. Groups giving over \$500 or less than \$10 were outliers, amounting to only 16.2% of respondents.

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Donor Recipient

To whom did you give? Check all that apply.

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




Response	Chart	Frequency	Count
An environmental or conservation project		37.9%	243
An education related project (e.g., school, scholarship or supplies)		32.3%	207
A needy individual		29.2%	187
Other		21.2%	136
A health clinic, hospital, or health education effort		19.7%	126
Disaster relief		16.5%	106
A women's equality or empowerment effort		16.4%	105
An entrepreneurship or micro-credit project		7.5%	48
		Valid Responses	641
		Total Responses	641

Individuals who donated money gave most often to environmental or educational projects. Other institutions such as health clinics received charity dollars from travelers, but it was needy individuals who received funds directly from almost 30% of respondents, most likely on the street.

Preferred Cannels of Donation

I feel more comfortable... (choose one)

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

Response	Chart	Frequency	Count
Giving to a charity / nonprofit in my country that works in the country I'm visiting		53.4%	751
Giving to a local charity / nonprofit I encounter on my own while abroad		38.2%	537
Giving to a charity / nonprofit recommended by or supported by the hotel or tour operator I'm using		8.4%	118
Not Answered			79
		Valid Responses	1406
		Total Responses	1485

Travelers enjoyed supporting charities in countries they were visiting. However, trust and credibility play an important role in charitable giving; the majority of respondents said they preferred making donations in their own country to a charity/nonprofit that operates in the country they were visiting. While 38.2% would give to a local charity they encountered themselves while traveling abroad, there was little trust in charities and nonprofits recommended by a local tour operator, or other vendor.

Contributing directly to an organization in the developing world can present problems — it is difficult for travelers to establish that a local organization is credible, or to be sure that donations are going to the people or programs they are intended for.

Most NGOs and reputable international charities recommend going through well-known organizations in a traveler's home country that is networked with organizations in other countries.

Degree of Commitment to Voluntourism

How committed are you to the idea that travelers should help to improve the lives and environment of communities they visit? Please mark a number from 1-5.

		1 (Not at all committed)	2	3 (Moderately committed)	4	5 (Highly committed)	Total	Mean	Std Dev
Degree of commitment	Count	55	158	586	407	256	1462	3.445	1.020
	% by Row	3.8%	10.8%	40.1%	27.8%	17.5%	100.0%		
Total	Count	55	158	586	407	256	1462	N/A	N/A
	% by Row	3.8%	10.8%	40.1%	27.8%	17.5%	100.0%		

Most respondents felt that travelers should have a positive impact on the communities they visited. Almost 70% were either moderately or very committed to the idea, while another 17.5% were highly committed to the responsibility that travelers had to the communities they visited. The number of respondents who felt that individuals had no social commitment when traveling was marginal.

The responses reflect the growing number of travelers choosing experiences that connect them to their hosts by actively participating in local programs at their destinations. Under the basic credo of “Go deeper, not farther; Participate, don't just observe; Find a need and help fill it,” eco-travel is evolving, for some, into Positive Impact Traveling. Jim Kane, President and co-founder of Culture Xplorers, says that sustainable travelers should have a net positive effect on natural and social ecosystem, not just a neutral one.¹

The trend has significant impacts for the travel industry — many travelers work with a travel company to plan activities on the ground or create their own experiences from scratch. While eco-travel-specific sites like VolunTourism.org, Global Exchange and Sustainable Travel International (STI) are still reliable sources of information for voluntour travelers, now Expedia, Condé Nast Concierge.com and other more mainstream travel sites and full-service, online booking agencies are offering information directed at the “positive impact traveler.”

“A traveler’s guide to going green,” on Expedia.com, features a wealth of information to eco-travelers, and partners with VolunTourism.org via a link to provide more information about volunteer opportunities.








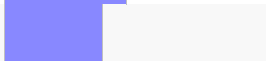

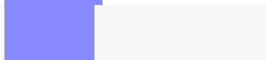

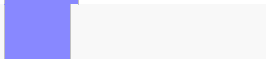

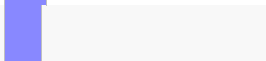

1) “Making a Positive Impact” Jim Kane, Culturocity.com November 2, 2007

Green Travel Marketing

Terms that Resonate with Consumers

In travel services communications, which of the following are the most meaningful and appealing to you? Mark no more than five top choices.

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

Response	Chart	Frequency	Count
Socially responsible		62.9%	912
Sustainable		60.5%	878
Fair trade		40.7%	591
Local		39.7%	576
Planet-friendly		35.4%	514
Organic		33.4%	485
Ecological		27.1%	393
Carbon neutral		20.5%	298
Trees, leaves, grass, etc. (photo or graphic)		19.8%	288
Eco		19.0%	275
The word "green"		14.3%	208
Planet Earth (photo or graphic)		12.2%	177
The color green		6.1%	89
Bio		5.1%	74
Other		3.4%	50
		Valid Responses	1451
		Total Responses	1451

In line with responses to Chart 75, socially responsible travel communications were most significant to respondents. 40.7% also said that fair trade practices were meaningful and appealing to them. Next to social justice, environmental sustainability was important to respondents in travel communications, with 65% citing sustainability as an important message and another 35.4% mentioning “planet friendly.”

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The sophistication of this group is evident in the relatively few respondents (14.3%) who said that travel literature branded “green” was particularly compelling them. Visuals of the planet Earth or the color green, or the use of the prefix “bio” were even less meaningful. Respondents seemed to be informed enough that catchphrases no longer carried much weight, and were looking for the substance behind the labels.

“[Environmentally responsible travelers] expect travel companies to be good stewards of the environment,” said seasoned sustainable travel writer Christopher Elliott. “Being green is so important that it shouldn’t become another marketing gimmick. It should be a part of what you do every day — part of every travel company’s DNA...[t]hat’s why green travel as we know it, with the hotel touting its use of recycled water, the airline bragging about its use of alternative fuels or the theme park buzzing about its new light bulbs, is well on its way to becoming history.”







“Being green,” according to Elliot, “shouldn’t be a reference to the color of your money.”¹

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

Drivers of Interest in Sustainable Travel

What are the primary drivers of your interest in green/sustainable travel options?

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

Response	Chart	Frequency	Count
My concern for the environment		80.6%	1169
Climate change		51.4%	746
Supporting businesses that are demonstrating sustainable actions		39.7%	576
My health		36.5%	529
My children's future		25.4%	368
Other		5.0%	73
Not interested		1.7%	25
Everybody's doing it		1.7%	24
		Valid Responses	1451
		Total Responses	1451

Respondents' interest in green/sustainable travel is genuine and direct: 80.6% said that their interest was driven by their concern for the environment, with another 51.4% saying it was motivated by a desire to minimize climate change.

Respondents were also aware they were voting with their travel dollar — 39.7% of respondents said they supported sustainability-oriented businesses in the travel industry.

Only slightly fewer respondents were concerned about their own health, feeling that traveling greener is also traveling healthier.

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Rating of Green Initiatives

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	Std Dev
Hotels	Count	41	395	234	503	99	121	1393	3.421	1.285
	% by Row	2.9%	28.4%	16.8%	36.1%	7.1%	8.7%	100.0%		
Car rental companies	Count	24	135	211	523	262	234	1389	4.127	1.242
	% by Row	1.7%	9.7%	15.2%	37.7%	18.9%	16.8%	100.0%		
Cruise lines	Count	34	115	164	342	340	398	1393	4.459	1.358
	% by Row	2.4%	8.3%	11.8%	24.6%	24.4%	28.6%	100.0%		
Airlines	Count	25	122	189	523	382	155	1396	4.132	1.161
	% by Row	1.8%	8.7%	13.5%	37.5%	27.4%	11.1%	100.0%		
All-inclusive resorts	Count	31	148	206	377	218	406	1386	4.314	1.417
	% by Row	2.2%	10.7%	14.9%	27.2%	15.7%	29.3%	100.0%		
Tour operators	Count	25	148	250	372	110	486	1391	4.331	1.461
	% by Row	1.8%	10.6%	18.0%	26.7%	7.9%	34.9%	100.0%		
Trains	Count	66	289	258	302	99	374	1388	3.865	1.606
	% by Row	4.8%	20.8%	18.6%	21.8%	7.1%	26.9%	100.0%		
Meetings and conventions	Count	27	187	215	437	234	289	1389	4.102	1.364
	% by Row	1.9%	13.5%	15.5%	31.5%	16.8%	20.8%	100.0%		
Total	Count	273	1539	1727	3379	1744	2463	11125	N/A	N/A
	% by Row	2.5%	13.8%	15.5%	30.4%	15.7%	22.1%	100.0%		

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. Hotels and

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trains fared best — while most respondents said they needed work, they were the only vendors receiving over “fair” votes over 20%.

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 Johnny-come-latelies 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. Royal Caribbean’s “Save the Waves” program is laudable; the cruise line’s conviction for dumping thousands of gallons of oily bilge, dry-cleaning fluids and photo-developing chemicals into the ocean, less so.¹

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

Should There Be More Green Suppliers?

What is your opinion about the increasing number of suppliers offering “green” services such as green weddings, green meetings, green transfers, etc.?

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

Response	Chart	Frequency	Count
Marketing tool that also helps increase awareness and make a difference		33.9%	479
I don't know enough about their programs to make a decision about it		30.5%	431
“Greenwashing” with no substantive value		20.9%	295
Good way of protecting the environment		14.6%	206
Not Answered			40
		Valid Responses	1411
		Total Responses	1451

Respondents, filtered as an eco-conscious traveler panel, were also conscious — even skeptical — of the role that marketing plays in green business. The largest group of respondents understood that “green” services were a marketing tool, but one that helped foster environmental awareness. They also felt that the services themselves had a tangible, positive effect on the environment.

There are over two million weddings a year in the U.S., at an average of 150 guests per wedding. While weddings alone are not responsible for global warming, their environmental impact is not insignificant, considered on a national or international scale. “With 45% of couples looking for green options this year, it has never been more important for wedding professionals to understand the environmental impacts of weddings,” says Kate Harrison, author of *The Green Bride Guide: How to Create an Earth-Friendly Wedding on Any Budget*.¹

When one considers the millions of business, social and entertainment events across the country, green event standards — even if they play a marketing value — have an important role in lowering the total carbon footprint of the American economy.





A not-insignificant 20.9% of respondents dismissed most green services as “greenwashing,” however — an empty marketing ploy with little or no substantive environmental benefit. 30.5% needed more information to form an opinion.

1) “Green Wedding Planning Course Helps Save the Planet” Reuters, Nov 3, 2009

Carbon Offset Programs

What is your opinion specifically about the “carbon offset” programs offered by some hotels, airlines and travel retailers, where for an extra fee, your purchase can be carbon-neutral?

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

Response	Chart	Frequency	Count
I don't know enough about the programs to have an opinion on them		32.4%	457
Marketing tool that also helps increase awareness and make a difference		30.9%	436
“Greenwashing” with no substantive value		22.8%	322
Good way of protecting the environment		14.0%	197
Not Answered			39
		Valid Responses	1412
		Total Responses	1451

Carbon offsets are complicated, abstract mechanisms that lie outside the everyday experience of most consumers. That is reflected in the 32.4% who said they did not know enough about them to form an opinion — the largest group among respondents. Of those who did have an opinion, responses were in roughly the same proportion as the previous question as far as how many felt “carbon” offsets were a marketing tool with substantial benefits, an empty greenwashing mechanism, or an important contribution to protecting the environment.

Offset programs have become a multimillion-dollar, global industry. Airline passengers can pay a distance-linked \$5 to \$40 to offset the environmental impact of their flight; hotel guests can also pay an additional offset fee to compensate for the energy use associated with their stay. The money goes to tree planting, hydropower and other programs that are supposed to offset the impact of pollution, CO₂ emissions and energy consumption.

Embraced by scores of leading airlines and hotel chains such as United and Marriott, offsets are a form of corporate social responsibility (CSR) with a direct connection with the green travel consumer. In the case of airlines, they reduce the impact of an inherently polluting form of travel — at least in theory. Increasingly, though, offsets are facing criticism not only from pro-growth, anti-environmentalists but pro-environment organizations, as well. Friends of the Earth called carbon offsets a “dangerous distraction” that are in essence a “medieval pardon for us to carry on behaving in the same way or worse.”¹

“We believe that the travel industry’s priority must be to reduce carbon emissions, rather than to offset,” said ResponsibleTravel founder Justin Francis. “Too often offsets are being used by the tourism industry in developed countries to justify growth plans on the basis that money will be

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donated to projects in developing countries.”² Responsible Travel, which canceled its carbon-offset program in October 2009, was one of the first travel companies to offer customers a carbon-offset option in 2002.

Environmental thought leaders are calling for new, more substantive ways to reduce carbon emissions. Kevin Smith, author of *The Carbon Neutral Myth*, calls carbon offsets a trick of “future carbon value accounting.” Smith said the apparent “greening” of travel suppliers and other industries is an accounting illusion, with grave environmental consequences, that invites parallels with the collapse of Enron.³

1) “Travel Briefs” CBS News/Associated Press, November 23, 2009

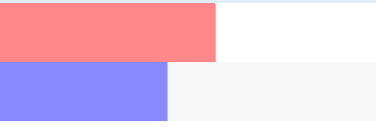
2) “Paying More for Flights Eases Guilt, Not Emissions” *New York Times*, November 17, 2009

3) *The Carbon Neutral Myth: Offset Indulgences for your Climate Sins*, Kevin Smith, Transnational Institute, 2007

Involvement of Nonprofit to Cast Legitimacy

Does it matter if these programs and services are offered in conjunction or partnership with a nonprofit group?

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

Response	Chart	Frequency	Count
Yes		56.5%	785
No		43.5%	605
Not Answered			61
		Valid Responses	1390
		Total Responses	1451

For a narrow majority of respondents, the association of a nonprofit group was like an accreditation that gave respondents confidence about a company's green products or services.













However, partnership with a nonprofit made no difference to more than 43% of respondents in their perception of those products and services.

The emerging debate about the effectiveness of carbon offset and some other green programs will increasingly be reflected in a divide among the nonprofit groups who partner with travel suppliers, causing additional confusion among green travel consumers.

Travel Information Resources

How do you research your travel? 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		75.4%	1094
Travel publications, guidebooks and/or websites		46.5%	675
Word of mouth		43.1%	626
Tourism office or visitor bureau publications and/or websites		28.6%	415
Green/environmental publications and/or websites		26.3%	382
News articles		22.3%	324
Email newsletters		21.5%	312
Local newspaper/travel section		19.2%	279
Other		5.5%	80
TV advertisements		4.3%	63
Radio advertisements		1.7%	24
Billboards		1.4%	21
		Valid Responses	1451
		Total Responses	1451

Respondents to this survey were a largely self-directed and “wired” group — Internet searching was far and away 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

Travel websites, along with travel publications and guidebooks, were used by 46.5% of respondents. Personal recommendations are always compelling — 43.1% of respondents said they had gathered information about green travel via word of mouth, which increasingly includes social media, where trusted networks give them the opinions of friends, or friends of friends.

It is noteworthy that such social media was a more significant source of information than advertising, with only 6% saying they got information from TV and radio advertising, and less



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than 1.5% using information seen on billboards. In fact, only 26.6% of respondents used traditional media (print and broadcast) to gather information about green travel.

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

Influence of Information Resources on Travel Decision Making

Which resources have influenced you in the past 12 months when planning your vacation (choosing your destination, tour, hotel, etc.).

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

		Does Not Influence Me	Somewhat Influential	Very Influential	Total	Mean	Std Dev
Banner ads on environmental websites	Count	887	353	47	1287	1.347	0.548
	% by Row	68.9%	27.4%	3.7%	100.0%		
Email newsletter broadcasts for environmental community	Count	643	528	104	1275	1.577	0.638
	% by Row	50.4%	41.4%	8.2%	100.0%		
Ads in mainstream publications	Count	636	582	70	1288	1.561	0.596
	% by Row	49.4%	45.2%	5.4%	100.0%		
Ads in environmental publications	Count	648	536	97	1281	1.570	0.630
	% by Row	50.6%	41.8%	7.6%	100.0%		
Articles on mainstream websites	Count	425	734	134	1293	1.775	0.618
	% by Row	32.9%	56.8%	10.4%	100.0%		
Articles on environmental websites	Count	512	584	186	1282	1.746	0.693
	% by Row	39.9%	45.6%	14.5%	100.0%		
Tourism bureau's environmental-specific website or brochure	Count	546	613	125	1284	1.672	0.645
	% by Row	42.5%	47.7%	9.7%	100.0%		
Articles in mainstream publications	Count	398	759	138	1295	1.799	0.611
	% by Row	30.7%	58.6%	10.7%	100.0%		
Articles in environmental publications	Count	515	595	185	1295	1.745	0.690

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	% by Row	39.8%	45.9%	14.3%	100.0%		
Traveler reviews on websites and blogs	Count	293	709	311	1313	2.014	0.678
	% by Row	22.3%	54.0%	23.7%	100.0%		
Word of mouth from friends	Count	146	540	636	1322	2.371	0.674
	% by Row	11.0%	40.8%	48.1%	100.0%		
Sponsorship of green/environmental events or organizations	Count	487	653	152	1292	1.741	0.654
	% by Row	37.7%	50.5%	11.8%	100.0%		
Total	Count	6136	7186	2185	15507	N/A	N/A
	% by Row	39.6%	46.3%	14.1%	100.0%		

Trust was most important in influencing respondents' travel decisions. As a group, respondents tended not to be 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

Instead, almost half of the respondents in this study were highly influenced by word of mouth from a trusted source: friends. Articles and reviews in publications, websites and blogs were somewhat influential for roughly half of respondents. 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 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

Due Diligence on Green Claims

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
3rd party certifications and/or green labels (e.g., “Green Seal”)		40.0%	580
Partnership with a nonprofit or government group		32.1%	466
Social network commentaries or peer reviews online		27.4%	397
Information provided by the supplier		26.7%	388
Family or friends		21.3%	309
Other		7.5%	109
		Valid Responses	1451
		Total Responses	1451

Consumers are bombarded by many claims from manufacturers, vendors and providers about “green” products and services. Eco-conscious travelers need to be able to verify the claims of green travel suppliers. Respondents said they looked most frequently for 3rd party certifications like “Green Seal.” However, 97% of the respondents to Chart 37 were not aware of *any* green travel certifications.

A leading travel guide may fill the void for the American hospitality industry. The 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.

Partnership with non-profit groups or governments also gave respondents confidence in their green travel purchases, as did social network and peer reviews.



Interestingly, fewer respondents relied on word of mouth from family or friends to determine the environmental friendliness of products and services than used 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.

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

Knowledge of Global Sustainable Tourism Criteria

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
Yes		7.7%	110
No		92.3%	1317
Not Answered			24
		Valid Responses	1427
		Total Responses	1451

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.

However, as this survey was conducted only months after the GSTC’s founding, less than 10% were familiar with it.


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.com, October 7, 2008

Can Suppliers Achieve GSTC?

Do you believe tourism suppliers can achieve these criteria?

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

Response	Chart	Frequency	Count
Yes		90.0%	99
No		10.0%	11
Not Answered			1
		Valid Responses	110
		Total Responses	111

Over 90% of respondents indicated that they believe that suppliers throughout the tourism industry could successfully comply with these criteria. While some environmentalists have criticized the GSTC for not going far enough, respondents reflected the prevailing view that the criteria were workable because they were based on international consensus, and because they had the partnership of prominent sustainable organizations like the American Society of Travel Agents (ASTA), Sustainable Travel International (STI) and Conservation International (CI). The respondents' answers were telling as well — industry certifications are effective when they are readily accepted and trusted by consumers.

The GSTC and other green certifications will succeed or fail based on their adoption by businesses in the travel industry, however. So it is encouraging that top online travel service provider Travelocity has launched a green directory as part of its partnership with the GSTC. A four-tier system based around the GSTC Partnership rating system helps Travelocity customers determine if a destination or business has implemented substantial environmental and cultural sustainability initiatives.

Expedia, Inc. (which owns both Expedia.com and Hotwire.com), Condé Nast *Traveler*, *National Geographic*, *National Geographic Adventure*, the International Hotel and Restaurant Association and the Federation of Tour Operators are also members of the GSTC Partnership.

Environmentally Friendly Brands

The responses below were ranked by the number of respondents who wrote in the response, unprompted. Only those brands with 10 or more responses were ranked.

MOST ENVIRONMENTALLY FRIENDLY HOTEL

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.

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

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, Kimpton [a study partner], registered more than a 4% response. Hilton and Marriott were the only other chains to receive more than a 3% 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

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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

MOST ENVIRONMENTALLY FRIENDLY DESTINATION

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.

(Respondents were limited to brief text responses)

Costa Rica was the only destination with market awareness as an environmentally friendly destination among respondents (6.8%). 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.

San Francisco, California was the only other destination with an environmentally friendly brand awareness over 2%. San Francisco’s Green Business Program grants certification to businesses meeting rigorous environmental standards, and the city’s mayor, Gavin Newsom, has said he aimed to make the city “as green as possible as fast as possible.”¹

“[I]t’s the right thing to do,” the mayor said. “Do we also think it creates an environment, literally and figuratively, that attracts people? You better believe it. And that’s important as well. We’re consistently among the top travel destinations in the world. We think people are attracted to the values of this city.”³

Significantly, 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 Conservation International and other

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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.”³

- 1) “San Francisco Bay Area goes green” EarthTimes.org, September 22, 2009
- 2) “San Francisco’s Eco-Evolution” [Karrie Jacobs](#), *Travel + Leisure*, April 2008
- 3) “Eco-Destination Brands” Marketing Green blog, June 30, 2006

MOST ENVIRONMENTALLY FRIENDLY AIRLINE

Over the past year, which airline 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.
(Respondents were limited to **brief** text responses)

Airlines are not generally associated with environmental friendliness, and respondents showed that no brands had succeeded in changing that image. In this question, over 65% of respondents could not name a single airline that presented itself as environmentally friendly, and more respondents chose “None” than any airline except Southwest. With a 4% response, Southwest was the “winner,” receiving almost twice as many mentions as other airlines.

Clearly, there are significant opportunities — or challenges — in establishing an environmentally friendly brand image 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, 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

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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

MOST ENVIRONMENTALLY FRIENDLY CRUISE LINE

Over the past year, which cruise line 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.

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

Cruise lines fared more poorly among respondents than airlines. 72.9% of respondents could not think of a cruise line that presented an environmentally friendly image. The leading response among cruise lines was "none." As with airlines, cruise lines seeking the business of eco-conscious travelers must establish a better and more visible brand image in the green travel market.

The tremendous emissions of a large liner (the QE2 has six diesel engines); the garbage, bilge and other waste that many lines still dump at sea; and the environmental and cultural impact to small communities in the Mediterranean and destination coastlines leave cruise lines a steep hill to climb in building an environmentally friendly brand. 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 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.¹

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. Carnival Cruises achieved the lowest possible score in all but one category.²

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

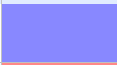



2) "Federal Agencies Raise Alarm About Cruise Sewage" October 28, 2009 FOX News

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Length of Next Vacation

My next vacation will be...

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

Response	Chart	Frequency	Count
3-4 days long		30.5%	419
About a week long		41.2%	565
About two weeks long		18.9%	260
3-4 weeks long		9.4%	129
Not Answered			25
		Valid Responses	1373
		Total Responses	1398

Respondents favored longer trips when planning their next vacation. Over 40% said their next vacation would be a week long, with an additional 28.3% planning trips of 2-4 weeks. Less than a third of respondents were planning trips of only 3-4 days.






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

Timeframe for Next Greener Vacation

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 in the next three months		20.4%	280
Next six months		20.5%	281
Next 12 months		32.7%	448
More than a year		18.0%	246
Not likely		8.4%	115
Not Answered			28
		Valid Responses	1370
		Total Responses	1398

Almost all respondents planned to take a “greener” vacation than they had in the past. Over 75% said that they would take one within the next 12 months — 40.9% as soon as the next six months, or sooner. Less than 20% said it would be more than a year until they took a more environmentally friendly vacation — and less than 10% 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. In a September 2008 survey of 3,000 travelers from the general public conducted by online travel community TripAdvisor, 34% 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

Location of Next Vacation

Where will your next vacation be?

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

Response	Chart	Frequency	Count
USA		60.1%	819
Europe		11.6%	158
Canada		5.9%	80
Central or South America		5.6%	76
Caribbean		4.0%	54
Asia		3.6%	49
Mexico		3.2%	43
Australia/Pacific		2.8%	38
Africa		2.1%	29
Middle East		0.7%	10
Antarctica		0.5%	7
Not Answered			35
		Valid Responses	1363
		Total Responses	1398

The overwhelming majority of respondents (60%) planned to take a vacation within the U.S. when they next traveled. Europe was the next most-popular destination, at 11.6%, followed by Canada, Central and South America, the Caribbean, and Asia with a 3.5% response.




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.

Agreement with Statements Regarding Green Travel

While making future travel plans, which of these statements, if any, do you agree with? Mark all that apply.

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

Response	Chart	Frequency	Count
I will shop for “greener” travel or destination options.		67.6%	945
I will make it a priority to experience and understand “threatened” destinations like Alaska, Antarctica, Mt. Kilimanjaro, etc.		24.0%	335
I will pay more to visit “green” destinations.		20.2%	282
		Valid Responses	1398
		Total Responses	1398

Respondents were committed to finding more sustainable options in their future travel destinations, as well as how to get there. However, respondents were largely uncommitted to making their green travel much more involved than that, e.g., “experiencing and understanding” hard-to-get-to, difficult-to-explore destinations like Antarctica or Mt. Kilimanjaro. Even fewer respondents were willing to state that they would pay more to visit green destinations. Convenience, price, comfort and safety will always guide travel planning for most consumers.

A survey commissioned by Element Hotels showed that almost 60% of travelers said that they disregard their green routines while on the road.¹ Researchers at the University of Virginia conducted a survey of students to see whether their environmentally responsible behavior was consistent between home and travel, as measured by their choices and actions at hotels. Close to 60% of respondents said they recycled paper at home, while only 30% did so while at a hotel; 60% conserved water at home yet less than 40% did so at a hotel; 80% conserved energy at home compared to only 40% who shut off lights and thermostats while at a hotel.

The results suggested to researchers that “individuals might feel more obliged to behave in an environmentally friendly manner in their local community as opposed to the tourist destination,” the researchers noted. In addition, the destination or hotel may lack the infrastructure necessary to practice green behavior. The respondents reported that engaging in green behavior detracted from the whole experience of being a hotel guest — “a strong trade-off between participation and the sacrifice of comfort and luxury.”²

The travelhorizons consumer survey, co-authored by the U.S. Travel Association and Ypartnership, found that 78% of American traveler respondents consider themselves “environmentally conscious,” yet only 9% said they were willing to pay more to use travel service suppliers that offer eco-friendly options — and only 3% of respondents have ever purchased a carbon offset when they booked travel.³



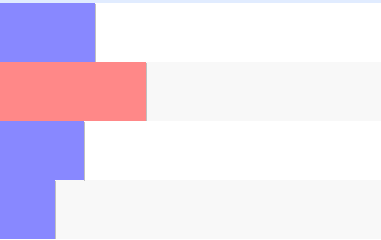
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- 1) *Bruin Business Review*, May 15, 2008
- 2) "Study Finds a Gap in Green Attitudes and Behavior at Hotels" Press Release, October 16, 2009
- 3) "The Green Premium" *Hotels Magazine*, August 31, 2009

Spiritual / Sacred Travel

How would you rate your interest in a trip to a spiritual or sacred place?

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

Response	Chart	Frequency	Count
Very interested		25.1%	343
Somewhat interested		38.1%	521
Low interest		22.4%	306
No interest		14.5%	199
Not Answered			29
		Valid Responses	1369
		Total Responses	1398

Over 63% of respondents were interested in visiting a spiritual or sacred place, with over 25% saying they were very interested and 38.1%, saying they were somewhat interested. 36.9% of respondents had low or no interest in visiting a spiritual or sacred place.

Sacred travel or spiritualized tourism is a very fast-growing travel niche whose size depends on how one defines it. A widening range of groups, from people with a metaphysical, New Age orientation to religious pilgrimages of almost every denomination, could fall under the “sacred travel” heading. Religious Travel alone is estimated at \$18-20 billion and 300 million travelers around the world.

Kevin J. Wright, president of the World Religious Travel Association (WRTA), points out that, “Because of the nature of religious tourism, it has proven elastic and strong, even in the current economy.”¹

Whatever its size and constituency, individual spiritual tour operators and destinations catering to spiritually oriented travelers are doing robust business. In Egypt, groups can receive metaphysically oriented tours of the Great Pyramid, the Sphinx and other antiquities for a few thousand dollars per person. One tour operator, Guardian Travel, has been growing its business by double figures every year.² Of the three million visitors who come to domestic new age destination Sedona every year, spending almost \$400 million, it is estimated that between 8% and 20% are there primarily for the spiritual experience.³

1) “Religious Travel Market Shows Resilience” LeisureGroupTravel.com, 2009

2) “Touring the Spirit World” Ethan Todras-Whitehill *New York Times*, April 29, 2007

3) “[Sedona Tourism Industry Feeling Recession’s Pinch](#)” Lucrezia Cuen, KNAU.com, August 25, 2009

Interest in “Green” by Travel Product

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

		Yes	No	Not Applicable	Total	Mean	Std Dev
Cruise	Count	425	291	622	1338	2.147	0.873
	% by Row	31.8%	21.7%	46.5%	100.0%		
Airline	Count	808	371	165	1344	1.522	0.704
	% by Row	60.1%	27.6%	12.3%	100.0%		
Hotel	Count	1071	186	91	1348	1.273	0.578
	% by Row	79.5%	13.8%	6.8%	100.0%		
Restaurant	Count	1065	221	61	1347	1.255	0.530
	% by Row	79.1%	16.4%	4.5%	100.0%		
Tour	Count	559	282	489	1330	1.947	0.886
	% by Row	42.0%	21.2%	36.8%	100.0%		
Rental car	Count	817	242	283	1342	1.602	0.814
	% by Row	60.9%	18.0%	21.1%	100.0%		
Total	Count	4745	1593	1711	8049	N/A	N/A
	% by Row	59.0%	19.8%	21.3%	100.0%		

From two and four 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. More respondents were going to make environmentally friendly choices in cruise vacations than were not planning to, but only by a margin of 3-2. And nearly as many respondents 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

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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; \$5-\$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 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)

Willingness to Pay to Decrease Footprint

How much extra, if anything, will you be willing to pay in order to decrease your ecological footprint on your next vacation?

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

Response	Chart	Frequency	Count
1% - 5% more than the cost of a similar, conventional trip		42.9%	584
6% - 10% more		35.9%	488
11% or more		5.4%	73
Not willing to pay more to travel greener		15.9%	216
Not Answered			37
		Valid Responses	1361
		Total Responses	1398

Over 84% of respondents said they would be willing to pay something in order to decrease their environmental footprint on their next vacation. Of those, half said they would do it if the cost of reducing their footprint were only marginally more (1-5%) than conventional travel. Another half were willing to pay more, between 6% and 10%, or even more than that.

Roughly in line with responses to other questions in this survey (see Chart 20, 24), under 16% of respondents would not decrease their environmental travel footprint if it meant paying anything more to travel.

Green travelers, like most green consumers, tend to “vote with their wallet.” Their purchases are often statements as well as simply expenses. For tourism and travel businesses, that represents a new profit opportunity. In a recent PhoCusWright study on the impact of environmental awareness on the travel industry, nearly one-third of U.S. travelers would pay a “green premium” to minimize the impact of their travel. However, the study also indicated that green travelers are looking for environmentally responsible practices that are more than superficial. “With consumers keeping a close watch on their spending,” said Sustainable Travel International president, Brian T. Mullis, “they need to know that a company has gone the extra mile to implement green initiatives like renewable energy, zero waste and carbon management practices.”¹

As Ypartnership’s Peter Yesawich said, while not many travelers are willing to pay extra for green experiences, they are watching to make sure their providers are going green.²

1) “Green is Good for the Environment, but is it Good for Business?” TravelIndustryWire.com, March 24, 2003




2) “The Green Premium” *Hotels Magazine*, August 31, 2009

Demographics

Relationship Status

What is your relationship status?

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

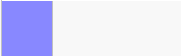



Response	Chart	Frequency	Count
Married, Domestic Partnership, Civil Union, etc.		43.3%	597
Single		31.1%	428
In a relationship		25.6%	353
Not Answered			13
		Valid Responses	1378
		Total Responses	1391

43% of respondents were married or in a domestic partnership or civil union. Another 25.6% not in a formal union were in a relationship, leaving 31% who declared themselves single.

Education

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		0.5%	7
High school graduate / GED		12.9%	178
Bachelor's Degree		46.8%	644
Master's Degree		31.4%	432
Doctoral Degree		8.4%	115
Not Answered			15
		Valid Responses	1376
		Total Responses	1391

86.6% of respondents had a college degree and almost 40% had advanced degrees.

Ethnicity

Which of the following describes your ethnicity?

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









Response	Chart	Frequency	Count
White/Caucasian		85.5%	1171
Asian		3.7%	51
Hispanic or Latino		3.5%	48
Mixed Race		3.0%	41
Other		1.8%	25
Black		1.2%	17
Native American or Alaskan Native		1.0%	14
Native Hawaiian/Pacific Islander		0.2%	3
Not Answered			21
		Valid Responses	1370
		Total Responses	1391

The clear majority (85.5%) of respondents were white. Asian, Hispanic, Mixed Race and Black respondents each represented less than 4% of participants to the survey.

Affiliation

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
Environmentalist		44.1%	614
Social / political activist		42.0%	584
Outdoor activities / adventure		36.7%	511
Academic		26.3%	366
Spiritual / yoga		18.1%	252
Vegetarian / vegan		17.6%	245
Religious		13.1%	182
Other		7.8%	108
		Valid Responses	1391
		Total Responses	1391
























Over 44% considered themselves environmentalists, and over 40% were active in political and social causes. 36.7% participated in outdoor activities and adventures, while over 25% were part of the academic community, and another 18.1% had a spiritual orientation and/or practiced yoga (possibly outside of the 31.1% who were part of a religious group or community).

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Occupation

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

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

Response	Chart	Frequency	Count
RETIRED		12.1%	165
Education & Library		10.6%	144
Tourism / Hospitality		7.3%	99
Community & Social Service		7.2%	98
Management		6.4%	87
Marketing / Advertising / PR		6.3%	85
Art, Design, Entertainment, Media & Sports		6.1%	83
UNEMPLOYED		5.9%	80
Life, Physical & Social Sciences		5.5%	75
Business & Financial		5.1%	70
Office & Administrative		4.2%	57
Computer & Mathematical		3.9%	53
Personal Care & Service		3.6%	49
Legal		2.6%	35
Sales		2.4%	33
Architecture & Engineering		2.0%	27
Food Preparation & Serving		1.5%	20
Meeting or Event Planner		1.4%	19
Protective Occupations (Fire, Police, etc.)		1.3%	18
Military		1.0%	14
Transportation & Material Moving		0.9%	12
Farming & Forestry		0.8%	11
Construction		0.8%	11

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Buildings and Grounds Maintenance		0.4%	5
Installation, Maintenance & Repair		0.4%	5
Production Occupations (e.g., Assembly)		0.4%	5
Not Answered			31
		Valid Responses	1360
		Total Responses	1391

Respondents came to the study from a wide range of professions, though education, hospitality/tourism, community service and management were the most well-represented. 12.1% said they were retired, and 5.9% indicated that they were unemployed at the time of the survey.

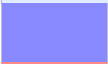






Tourism/hospitality professionals accounted for 7.3% of respondents, while food preparation accounted for another 1.5% and meeting/event planners were 1.4% of the total.

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Income

Please select your annual household income (US Dollars)

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

Response	Chart	Frequency	Count
\$0 - \$49,999		22.6%	290
\$50,000 - \$74,999		23.2%	298
\$75,000 - \$99,999		17.9%	230
\$100,000 - \$134,999		16.0%	205
\$135,000 - \$174,999		9.0%	116
\$175,000 - \$249,999		6.3%	81
\$250,000 - \$374,999		3.4%	44
\$375,000 - \$1,000,000		1.2%	15
\$1,000,000 or more		0.2%	3
Not Answered			109
		Valid Responses	1282
		Total Responses	1391

The largest single group of respondents, at 23.2%, was comprised of respondent households that earned between \$50,000 and \$74,999. Adding individuals making less than \$50,000, the number of respondents earning less than \$75,000 comprised 45.8% of respondents. However, 54% of respondents made *over* \$75,000 — most under \$100,000 but a few over \$1,000,000.

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Year of Birth

Please select the year you were born...



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

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 two years with the largest representation are 1959 and 1966.

Gender

Are you?

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




Response	Chart	Frequency	Count
Male		41.4%	575
Female		58.6%	814
Not Answered			2
		Valid Responses	1389
		Total Responses	1391

More respondents — 58.6% to 41.4% — were female.

Children at Home

How many children under age 18 live in your home?

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

Response	Chart	Frequency	Count
0		86.1%	1198
1		7.1%	99
2		4.9%	68
3		1.2%	17
4		0.6%	8
5		0.0%	0
6		0.0%	0
7		0.0%	0
8		0.1%	1
9		0.0%	0
10		0.0%	0
11 or more		0.0%	0
		Valid Responses	1391
		Total Responses	1391

Only 12% of respondents had children in the home. The rest — 86.1% — had no children in the home.