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**A Barometer for Sustainable Travel and Tourism to track responsible consumer behaviour. Insights from Canada, Russia, Switzerland, and the USA travel markets**

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### **Abstract**

The project developed a Barometer for Sustainable Travel and Tourism (BSTT) markets to understand the role and meaning of sustainability criteria in bookings. The barometer consists of a series of relevant questions to estimate market understanding of sustainable tourism products that can be applied each year and internationally. This report details a draft framework for the BSTT with results from Canada, Russia, Switzerland, and the USA. The proposed barometer enables the monitoring of sustainable tourism markets worldwide or at a specific destination.

### **Keywords**

Sustainable tourism, indicators, monitoring, demand, markets, behaviour, trends

### **Citation Suggestion**

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## 1. Introduction

This report aims to document the findings of a Barometer to measure consumer attitudes and actual behaviour in a sustainable travel and tourism context. The “Barometer for Sustainable Travel and Tourism (BSTT) from here on “The Barometer” is the initiative of the Institute of Tourism at Lucerne School of Business in Switzerland who coordinated a cooperative joint research project with institutions from Canada, Russia and the USA. This report details the outcomes from the application of the Barometer in these four countries.

### 1.1. All stakeholders are responsible for achieving sustainable tourism

The United Nations World Tourism Organization (UNWTO) defines sustainable tourism to “take full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities» (UNWTO, 2019). This definition requires the tourism industry to provide more sustainably managed products and services that continuously improve its performance. To achieve SDGs, various laws, regulations, policy guidelines and voluntary measures exist at different scales for businesses, destinations, and governments. However, achieving sustainable development is also the responsibility of consumers as the Sustainable Development Goals (SDGs) call for global and collective action.

**Figure 1 Sustainable Development Goals**



Image source: <http://tourism4sdgs.org>

The achievement of SDGs involving consumers requires a focus on the demand side of the tourism system. Like managing tourism products and services, consumers can be influenced by various laws, regulations, and policy guidelines. Additionally, sustainable consumers behaviour can also be facilitated by a range of social and market mechanisms where communication and marketing instruments play an essential role. Thus, to achieve a real shift towards achieving SDGs needs all tourism stakeholders to take on responsibility in the tourism system. Therefore, it is fundamental that travellers and tourists are motivated and encouraged to make more responsible and sustainable choices for any trip taken, in any context, to any destination.

## **1.2. The need to measure sustainable consumer behaviour in a travel and tourism context**

As international tourism markets evolve, there is a need to understand the role sustainability plays in tourist's values, attitudes, and specific behaviour decisions. Although there are many studies about sustainable tourism demand and market trends, many of these are one-off publications with a small sample, have a specific destination, or issue as a focus. Currently, it is unknown how market profiles evolve in a sustainable tourism context.

At the time of writing this report, a lack of consistent understanding is missing about the "profile" of a sustainable traveller or tourist. Numerous studies suggest that:

- sustainable tourists represent a niche; however the segment is progressing towards mainstream (Dolnicar 2015, Booking.com, 2017, 2019, ABTA 2019)
- sustainable tourist markets exhibit a growth potential (Wehrli et al., 2011, CREST 2015, WEF, 2017, UNWTO 2019).
- a growing social and environmental interest and concern exists amongst an increasing proportion of tourists (QA Research 2019, FUR 2019, Weber 2019, WTTC, 2019)
- a growing awareness is observable amongst tourists about the broad negative impacts of their travel and tourism activities, but a gap is also noticeable between good intentions and desirable good behaviour (Juvan & Dolnicar, 2017, UNEP 2017).
- most consumers are only willing to pay minimal amounts additionally for sustainable tourism although study findings vary enormously according to the destination, products and methodologies applied (Gao et al., 2016, Hinnen et al., 2017, Lopez-Sanchez- Pulido-Fernandez, 2017, Pulido-Fernandez and Lopez-Sanchez 2016, Minton et al., 2018)
- sustainable tourists spend higher at the destination than "conventional" visitors (Sustainable Travel International et al., 2016, Nickerson et. al., 2016, Lopez-Sanchez- Pulido-Fernandez, 2017)
- the demographic characteristics of sustainable tourists are heterogenous according to the destination and scale of study (Sustainable Travel International et al., 2016, Lopez-Sanchez-Pulido-Fernandez, 2016, Joshi and Rahman, 2019)
- sustainability factors are a growing aspect of tourism development including for marketing and promotion. Sustainability is increasingly considered to be a part of a satisfying visitor experience (Font and McCabe 2017, Gerdt et al., 2019, OECD, 2018).

In this context, a need and an opportunity exist to develop an international sustainable travel market index or "Barometer". Such a tool could serve as a basis for strategic decision-making by the tourism sector to implement more measures to improve its sustainability performance. It could also help destinations better market their current products and services. Finally, a barometer could help implement behavioural measures at destinations to support the tourism sector to achieve SDGs faster, and relevant and appropriate to its local context.

The regular administration of an independent and reliable monitoring framework to measure consumer behaviour in a sustainable tourism context can assist a shift towards more sustainability actions. It needs to be applicable across all markets (emerging to mature) and cover the life cycle of a trip (planning, travel, travel to and from a destination and a stay there). A barometer needs to cover standard tourism

products and services consumed along the value chain (such as transport, accommodation, hospitality, and activities at destinations). The goal is that the *Barometer for Sustainable Travel and Tourism* (BSTT) becomes a global tracking instrument for trends and specific market insights.

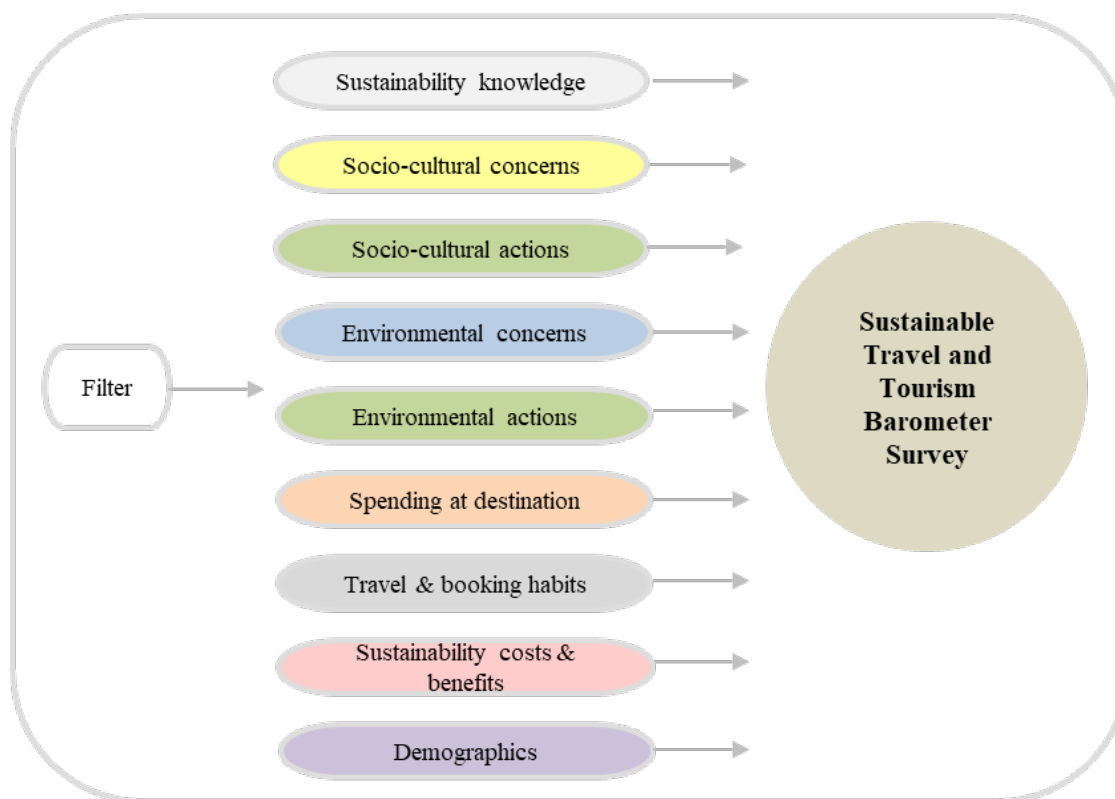
A sustainable travel and tourism barometer should be useful to all tourism stakeholders and help reach Sustainable Development Goals (SDG). It needs to generate comparable data across markets that show current trends and situations. A sustainable tourism market barometer could help track trends and contribute to understanding how to facilitate increased sustainable consumption and production patterns in the tourism sector (SDG 12). By monitoring the global market via an industry-specific barometer, it would be possible to identify and accelerate necessary changes towards sustainability.

By defining a set of core indicators about the demand side of tourism, reflecting general criteria for sustainability, the Barometer could be further adapted with additional indicators to suit specific tourism products or tourism destinations. To achieve this goal, a simple tool is needed today to start a global tracking instrument that tourism stakeholders can build on.

## 2. Methodology

The Barometer described in this report was a practical test project. It was designed as an online questionnaire. The questions for the survey were developed based on literature including published industry reports, the UNWTO Guide for Responsible Travel (2016) and expert knowledge within the team. Several rounds of editing were undertaken before a final survey was pretested in October 2017. The aim was to collect comparable information about consumers in the four different countries with respect to a common set of indicators that reflected sustainable travel and tourism criteria. In this context, the survey included questions about a set of key topics (Figure 2).

**Figure 2 The Barometer Questionnaire Framework**



The topics can be traced back to various parts of the UNWTO Guide for Responsible Travel, and the Global Sustainable Tourism Criteria. The questions were formulated using a simple language to avoid any technical and academic expressions about sustainable tourism. Where relevant, respondents had to answer questions according to trip types. The survey yielded data about travel purpose, including business, leisure/holiday, visiting friends and family. The Barometer mostly measured “consumer actions” rather than intentions and attitudes (although these were included in the survey to some extent). It covered the socio-economic and environmental factors of sustainable consumer behaviour.

A final survey was administered online in Canada (N=1002), Russia (N=1000), Switzerland (N=1043) and the USA (N=1105). A polling company was engaged for data collection in each country. Data collection took place slightly differently in the four countries between November 2017 and August 2018. In Switzerland, the survey was administered in German and only in the German-speaking part of the country. In the USA and Canada, the sample came from across the nations. In Russia, the survey came only from the Stavropol Region, and it was administered in Russian. A filter was applied to



potential respondents, which meant only individuals above 18 years who took at least one trip during the past 12 months were permitted to participate. The questionnaire required approximately 10 minutes to complete. Data was transferred for storage and analysis into SPSS (v.22) and Microsoft Excel was used to create illustrative charts and figures displayed in this report. The data collected was compiled for simple graphical comparison purposes and statistically not tested due to variations in the respondent profiles and questionnaire translations.

### 3. Survey Profiles of Respondents

The demographic profiles of all participants are summarised in Table 1. The respondents were almost equally male (50.6%) and female (49.1%) in each country. The age of respondents was well distributed, where 44% of surveyed were under 40 years of age. The Russian survey had 26% 18 to 25 years, Switzerland 11% and Canada and the USA under 10% in this age group. The other age groups were comparable in proportion.

**Table 1: Participants' profiles according to gender and age**

		CH (N=1043)	RUS (N = 1000)	CAN (N=1002)	USA (N=1105)	Average (N=4150)
<b>Gender</b>	Male	50.1 %	50.0%	48.0%	54.3%	50.6%
	Female	49.1 %	50.0%	51.7%	45.5%	49.1%
	Prefer not to say			0.3%	0.2%	0.1%
<b>Age</b>	18-25 years	10.9%	26.3%	6.2%	8.6%	13.0%
	26-40 years	24.3%	27.6%	35.9%	35.4%	30.8%
	41-55 years	35.4%	20.6%	21.5%	28.4%	26.5%
	56-70 years	24.6%	19.7%	28.6%	22.5%	23.9%
	Above 70 years	4.8%	5.8%	7.8%	5.0%	5.9%

#### 3.1. Trip types in the past year

Travel was important in all four destinations surveyed, with some variations according to the purpose (Figure 3). For business, the travel patterns were broadly similar in all four countries. More than half of all participants “never” travelled for business reasons. In Russia, 21% took at least one business trip, while Swiss and Canadian respondents travelled less frequently for business.

Leisure travel differed between the countries. Most of the Swiss (98%) and Canadian (94%) respondents took at least one trip. In the USA, 28% “never” travelled for leisure, similarly to 23% in Russia. In all four countries 10% of the participants took “more than five” trips.

The distribution of travel to visit friends and family was again relatively similar in the four countries. Taking at least “one” such trip was the most common for Canadians (37%) and Americans (29%), while for Russians it was once again the “never” that received the largest response (31%) followed by “once” 21%.

**Figure 3: Frequency of a trip with at least one overnight stay**

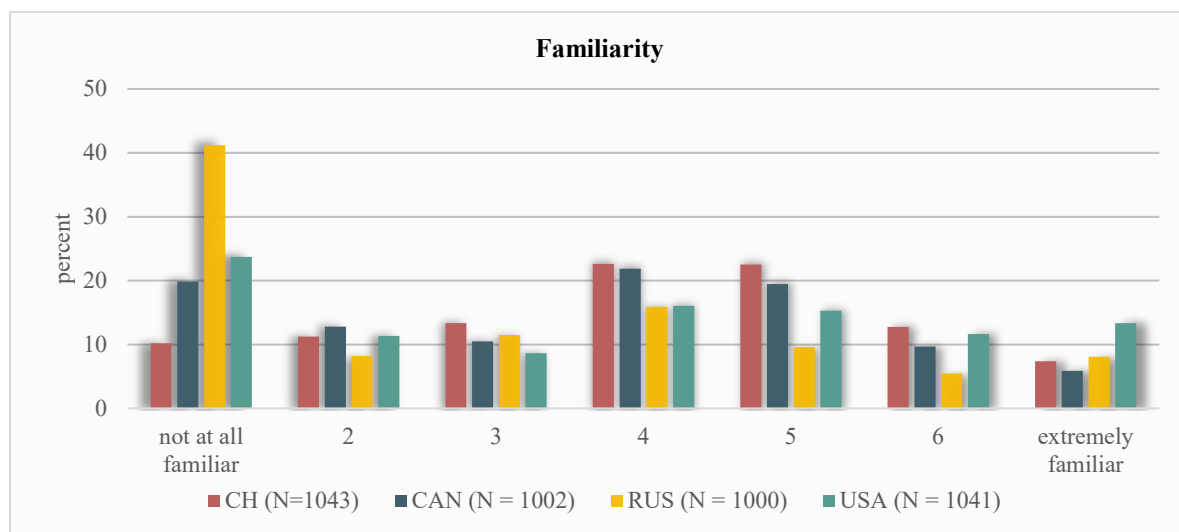


### 3.2. Familiarity with sustainable tourism

To achieve the sustainable development goal of responsible consumption patterns (SDG 12), “tourists” must take more responsibility in their tourism service booking or purchase behaviours. Since the consumption of tourism services can occur at any stage of any trip, responsible purchase decisions must be made at all stages. If consumers choose more responsibly managed services, they directly reward businesses that have invested effort into putting sustainability principles into practice. In turn, this enables increased responsible consumption where consumers and businesses play an essential role. A preceding step towards achieving this goal necessitates tourists to understand the meaning of sustainable tourism. Without this, it is not possible to make responsible purchases, where informed choices are made in favour of sustainably managed products. In the survey, respondents were presented with a sample definition of sustainability and asked familiarity with it.

Compared to all others, Russians were the least familiar with sustainable tourism, where 41% indicated “no familiarity at all” with the concept. The other countries had well-distributed respondents in all categories, highlighting a fair to acceptable understanding levels amongst Americans, Canadians and Swiss (4 to 6 on the scale in Figure 4). For the category “extremely familiar”, the most responses were from Americans (13%) followed by Russians (8%), Swiss (7%) and Canadians (6%).

**Figure 4: Familiarity in the meaning of sustainable tourism**



### 3.3. The role of sustainability, time, and effort for planning sustainable travel

A commonly recommended step towards acting to be a responsible traveller or tourist is to invest time and effort into planning a trip because it helps build understanding and promotes more informed decision-making. When asked about the “importance of sustainability” to trip planning, for a notable proportion of respondents (all trip types) it was “not important at all” (Figure 5).

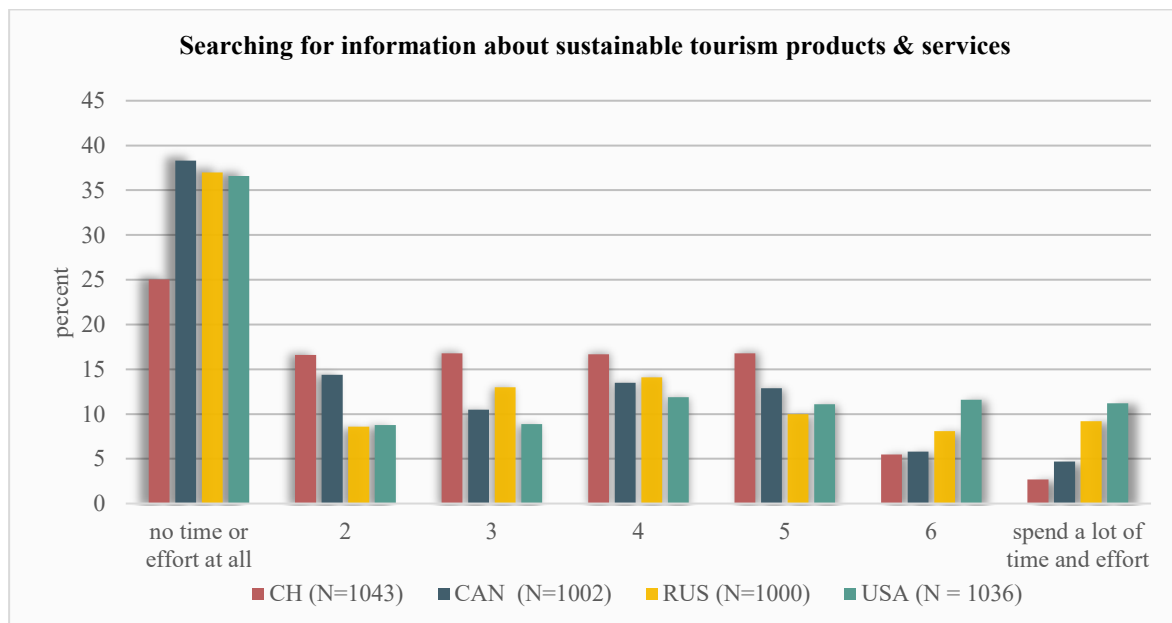
**Figure 5: The importance of sustainability for trip planning**



Sustainability considerations were most important for leisure and holiday trips, followed by visiting friends and relatives. For these, the trends indicate sustainability considerations of reasonable “importance” for all countries surveyed (Figure 5). However, for business travellers, sustainability was consistently the least important. In total, 38% Americans, 46% of Swiss and Canadians and 51% of Russians indicated sustainability as “not at all important” when planning a business trip.

The effort in getting information about sustainable tourism is also an important indicator of how committed consumers are about choosing sustainably managed offers. According to Figure 6, a significant variation is observable amongst the four countries surveyed. The most prominent response group was for “no time at all”. Summing the responses 5 to 7 in Figure 6, Americans invest the most time and effort searching for information about sustainable travel and tourism products (34%), followed by Russians (27%), Swiss (25%) and Canadians (23%).

**Figure 6: Amount of time and effort invested in searching for information about sustainable tourism products and services**

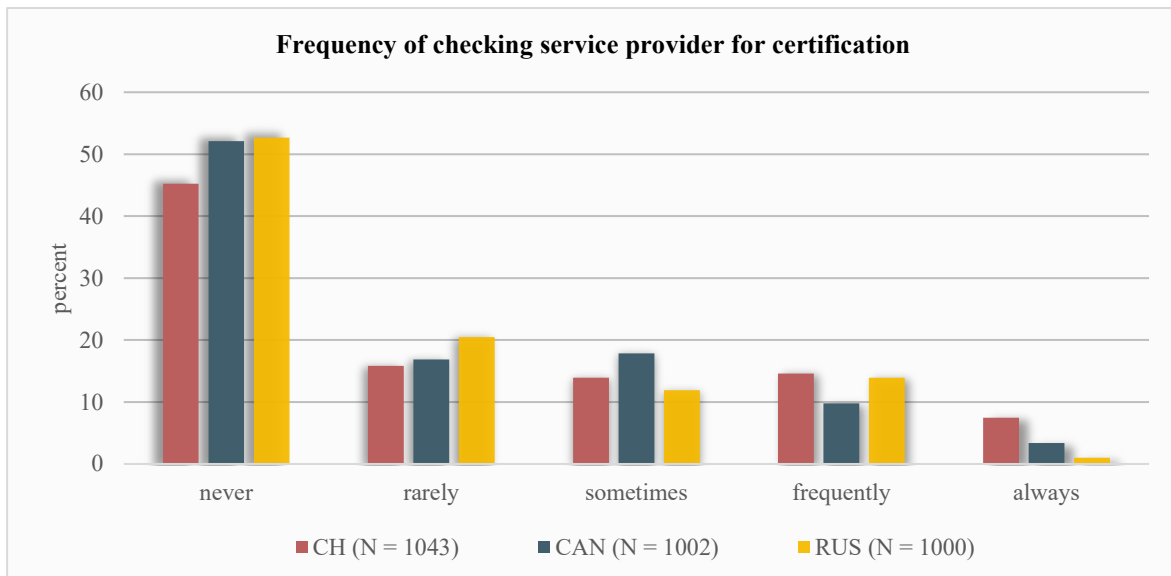


### 3.4. The role of certifications

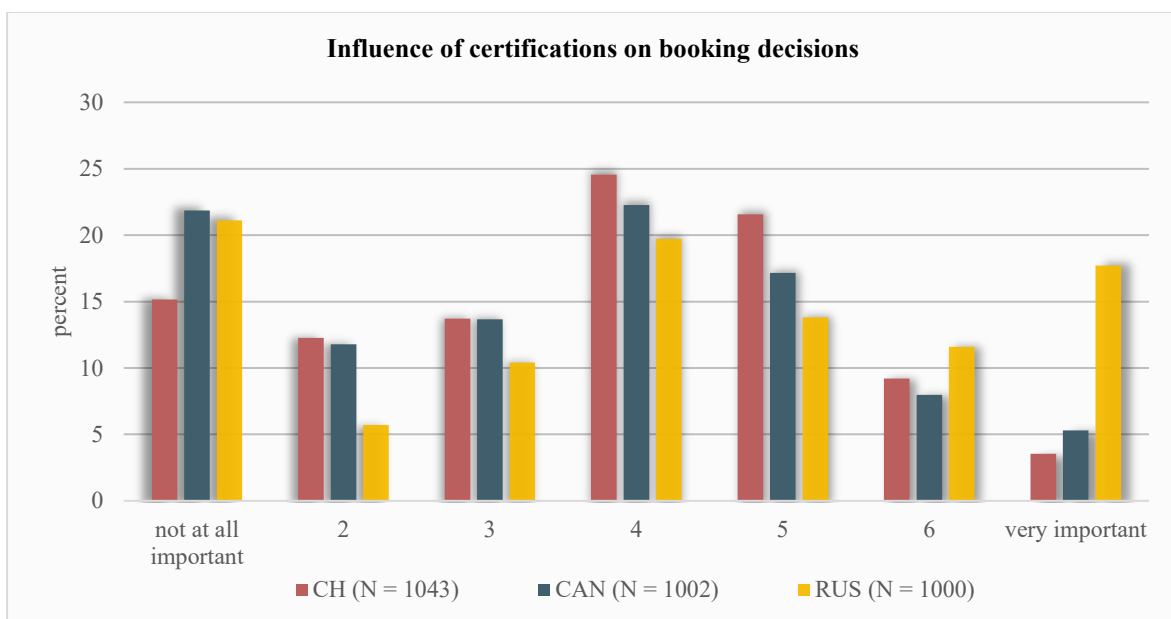
Numerous responsible or sustainable consumer guidelines recommend checking product and services information for certifications/labels since they are an essential cue for “responsible or sustainable management”. In this context, the Barometer asked how frequently this played a role in planning a trip. The results show that labels “never played a role” for nearly half all respondents, and precisely 45% in Switzerland, 52% in Canada and 53% in Russia (Figure 7). Combining the categories “frequently and always” the Swiss checked labels most (22%), followed by Russians (15%) and Canadians (13%).

Respondents were also asked how important sustainability labels and certifications were to their booking decisions if they found such tourism products and services. As Figure 8 shows, the responses varied amongst the four countries. Comparing categories 5 to 7 (important to very important), labels were the most important for Russians (43%), the Swiss (34%), followed by Canadians (30%).

**Figure 7: Frequency of checking a tourism service provider for certification**



**Figure 8: The influence of certifications and labels on tourism booking decisions**



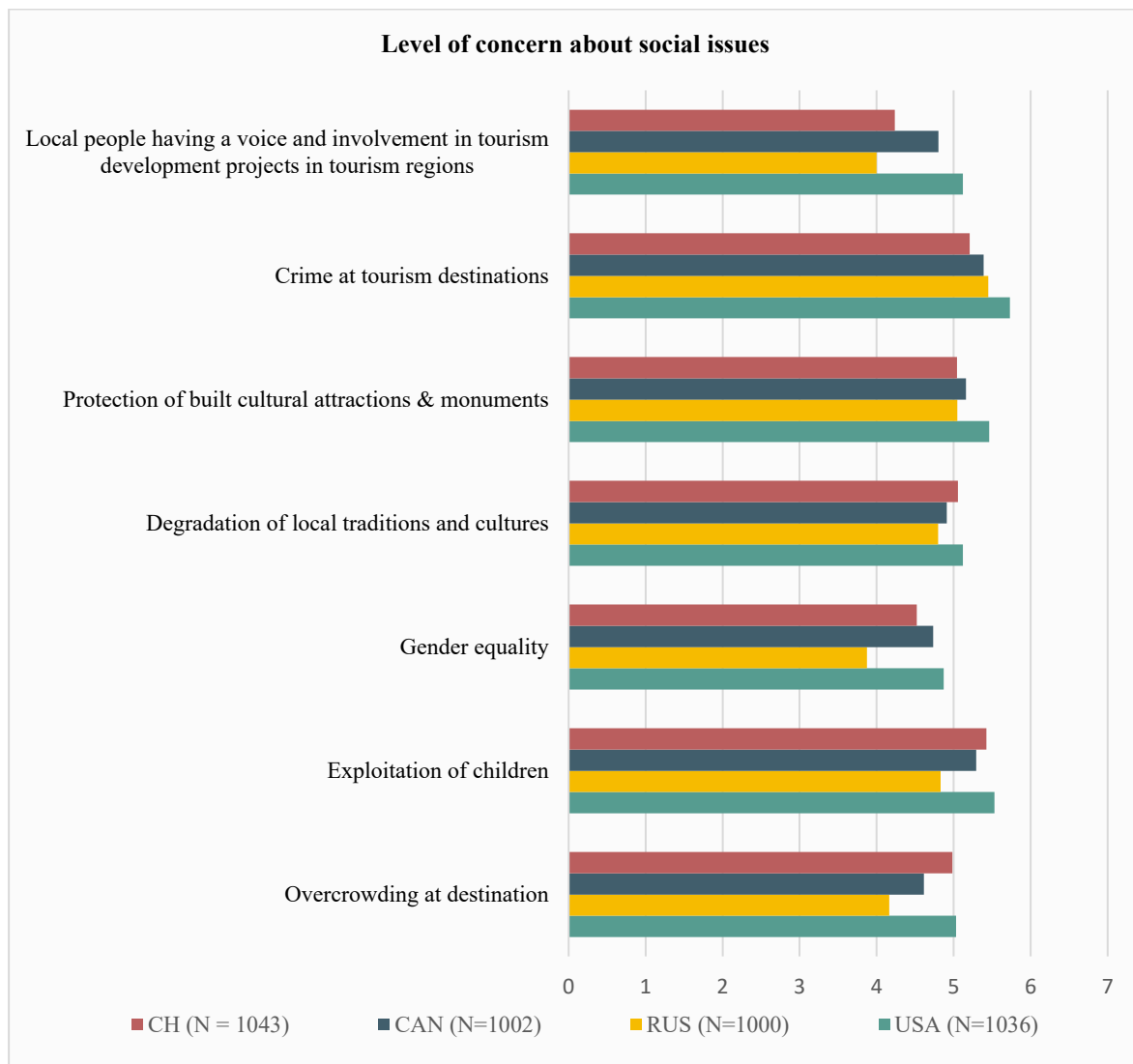
Note: there is no USA data for Figure 7 and 8, as the survey excluded this question specifically

### 3.5. Concern about various issues at destinations

The level of concern potential tourists show towards social, economic, and environmental issues is an important signal for tourism service providers and destinations. Although a concern may not directly relate to how visitors consume and behave, attitudes still provide insight into consumer trends. In this context, respondents rated their level of concern on a range of issues resulting from tourism activities at destinations.

For a range of social issues (Figure 9), all respondents showed a relatively high level of concern on a scale 1 to 7. Based on mean scores for each, the three most important issues for the combined country sample included: “local people having a voice and involvement in tourism development projects in tourism regions” (mean score 4.54), followed by “crime at destinations” (mean 5.44), and “exploitation of children” (mean 5.27). On average, Russians were least concerned about social issues (mean 4.60) for all the seven items, followed by the Swiss (mean 4.92), Canadians (mean 4.99). Americans were notably more concerned about all social issues, with also the highest mean score for all issues (5.27).

**Figure 9: Level of concern about social issues that sometimes directly result from tourism**

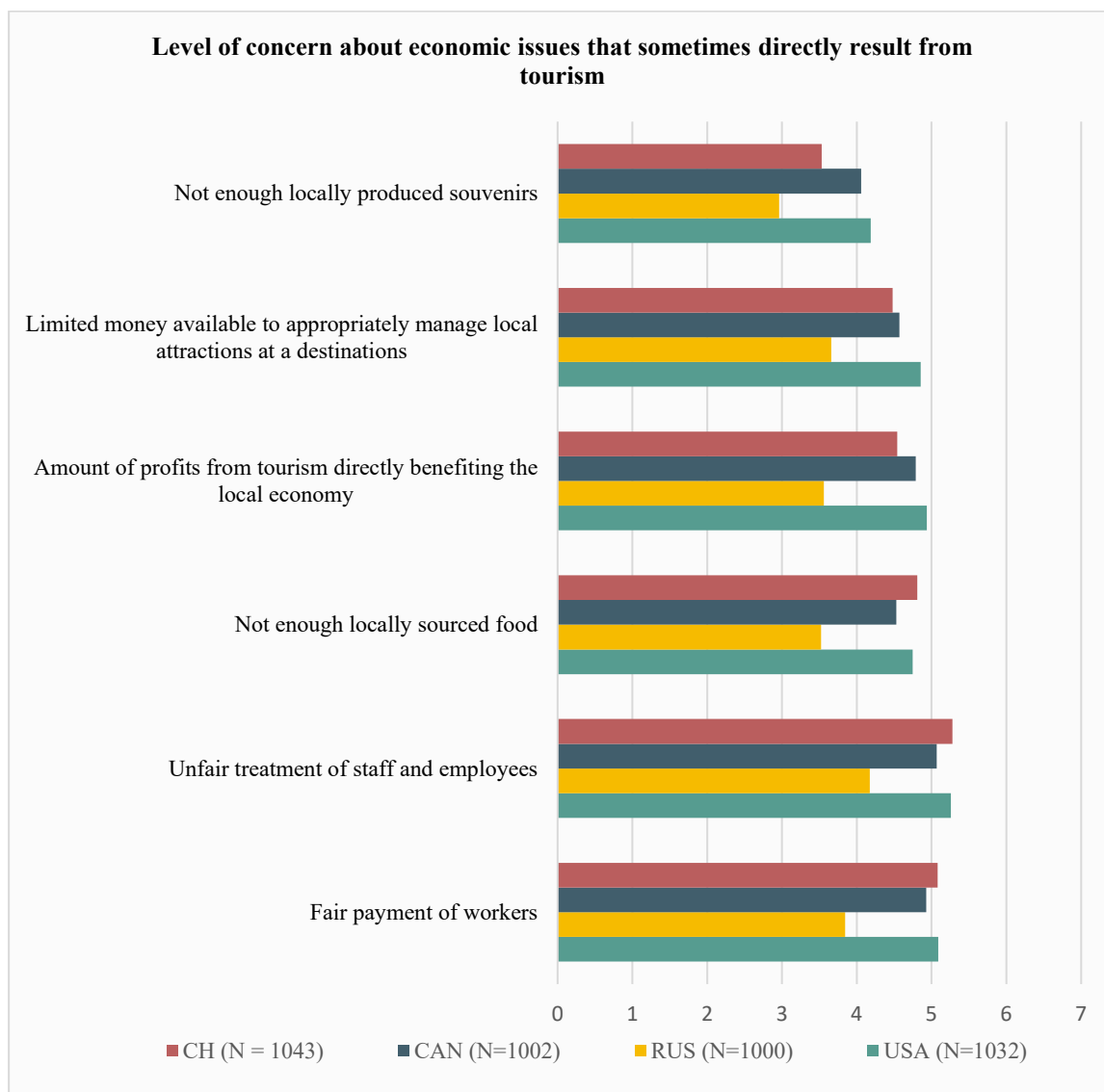




For a range of socio-economic issues (Figure 10), the respondents showed significant variation amongst the four countries on a 1 to 7 scale. Based on “mean scores for each issue”, the three most important economic issues were (all countries combined), “unfair treatment of staff and employees” (mean 4.95) followed by “fair payment of workers” (mean 4.74) and “profits from tourism directly benefiting the local economy” (mean 4.46).

Comparing the four countries, on average, Russians were least concerned about economic issues (mean 3.62) for all the six items, followed by the Swiss (mean 4.62), Canadians (mean 4.66). Americans were notably the most concerned about most economic issues, with the highest mean score for all issues of 4.85.

**Figure 10 Level of concern about economic issues that sometimes directly result from tourism**

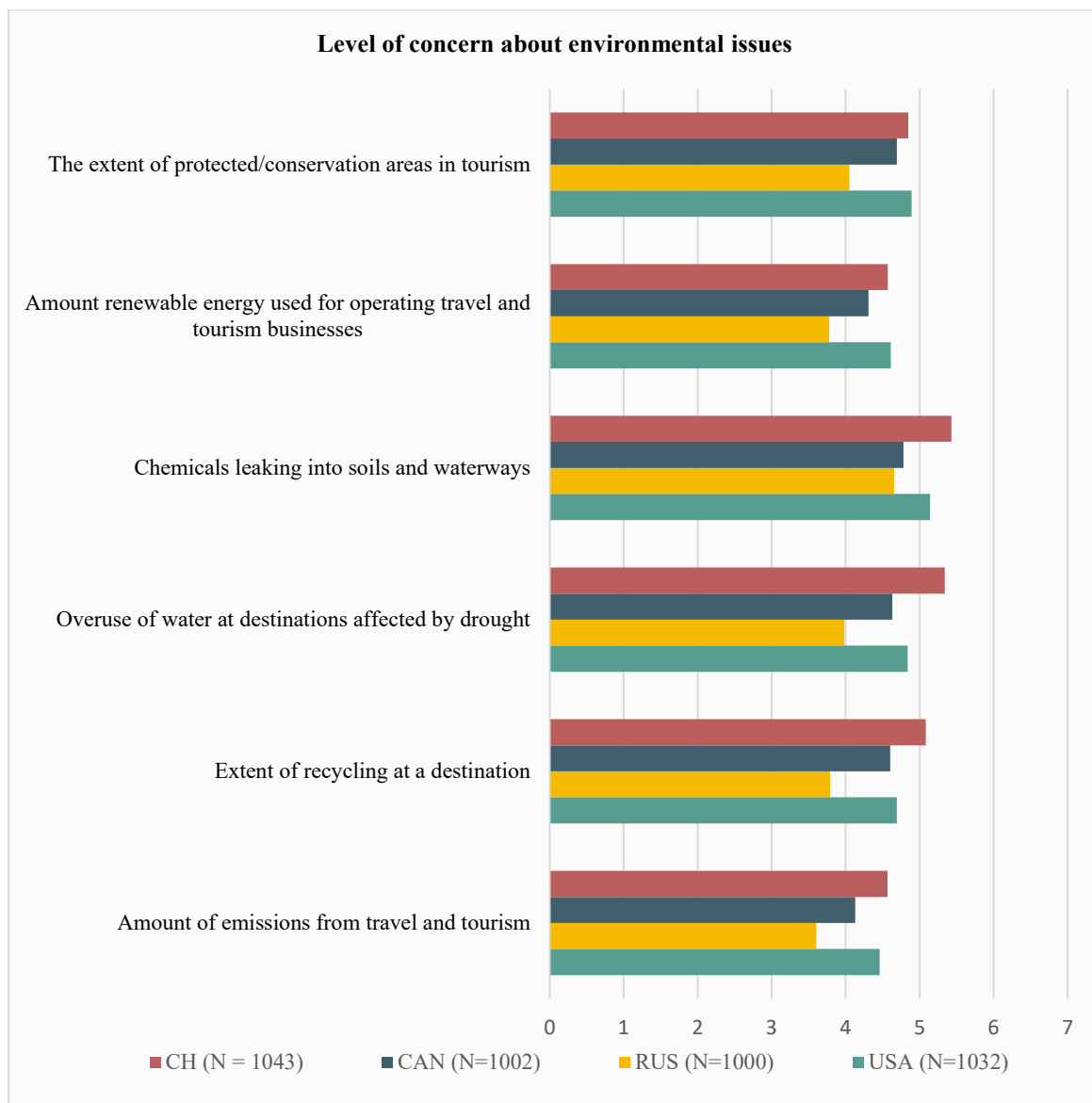


For a range of environmental issues (Figure 11), responses were similar and comparable in the four countries with minor variations on a 1 to 7 scale. Based on “mean scores for each issue”, the three most important environmental issues were (all countries combined), chemicals leaking into soils and waterways

(mean 5.00), followed by “the overuse of water at destinations affected by drought” (mean 4.70) and “the extent of protected/conservation areas in tourism at destinations” (mean 4.62).

Comparing the four countries, on average, Russians were least concerned about environmental issues (mean 3.98) for all the six items, followed by Canadians (mean 4.52), Canadians (mean 4.66) and Americans (mean 4.77). Swiss were notably the most concerned about most environmental issues, with the highest mean score for all issues of 4.97.

**Figure 11 Level of concern about environmental issues that sometimes directly result from tourism**



Based on the three dimensions of sustainability, the findings show that overall social issues are of most concern to respondents in the four countries (mean for all seven items 4.94), followed by environmental issues (mean for six items 4.56) and economic issues (mean for six items 4.44).

**Figure 12: Frequency of considering the negative impacts of a trip when planning**



### 3.6. Visitor's level of impact considerations

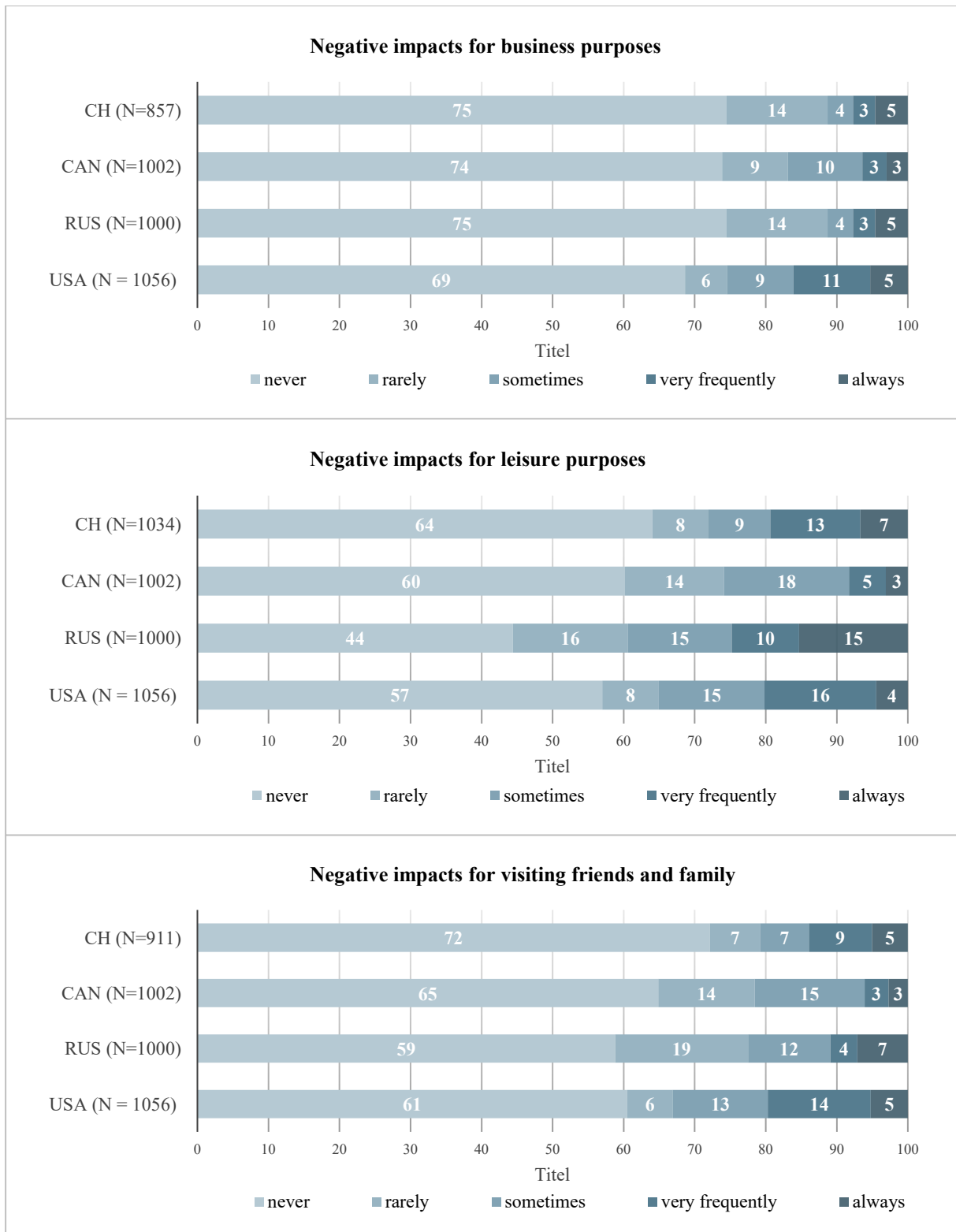
Each person has various direct and indirect economic, social and environmental impacts via travel and tourism-related activities. Therefore, it is essential to gauge the extent to which individuals are aware of this. When asked about the frequency of negative impacts considered, it appears that respondents from

all four countries considered this the most when the trip was in a leisure context, somewhat less in a visiting friends and relatives. In the context of taking a trip for business purposes, 60% of respondents (mean for the four countries) never considered any negative impacts that can result from their trip and related activities (Figure 12).

In the context of a leisure trip, the responses well distributed regarding the frequency of considering negative impacts resulting from a trip (Figure 12). For the category “always”, the highest response rate came from “Swiss respondents (10%), followed by Americans (9%), Canadians (5%) and Russians (3.6%).

When asked whether they chose ever not to go on a trip due to the negative impacts (regardless of travel modus), overwhelmingly for all three travel categories, between 60 and 80% of respondents chose “never” (Figure 13).

**Figure 13: Choosing not to go on a trip to a destination to avoid causing negative impacts**



### 3.7. Social Behaviour at the Destination

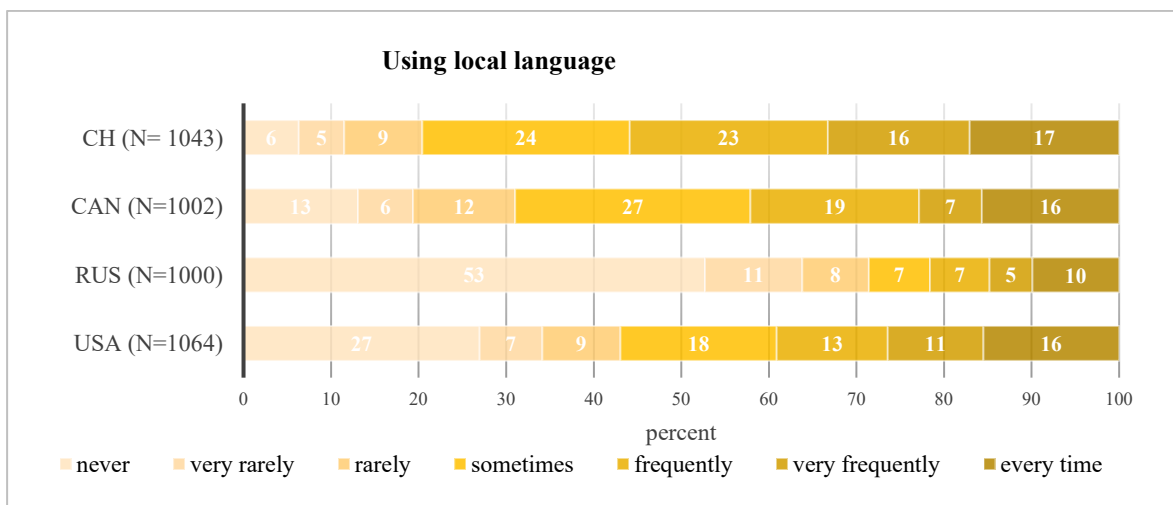
Responsible visitor behaviour at the destination is a central theme and criteria of sustainable tourism. In the UNWTO responsible tourism guideline, the section “Honour your hosts and our common heritage” describes specific suggestions. Some of this includes understanding local customs and cultures and behaving according to them. The Barometer asked a range of commonly recommended social actions to honour host destinations.

According to Figure 14, 56% of Swiss respondents “frequently to always” tried using the local language at the destination. However, the rate was somewhat less by Canadians (42%) and by Americans (39%) and significantly less by Russians (22%).

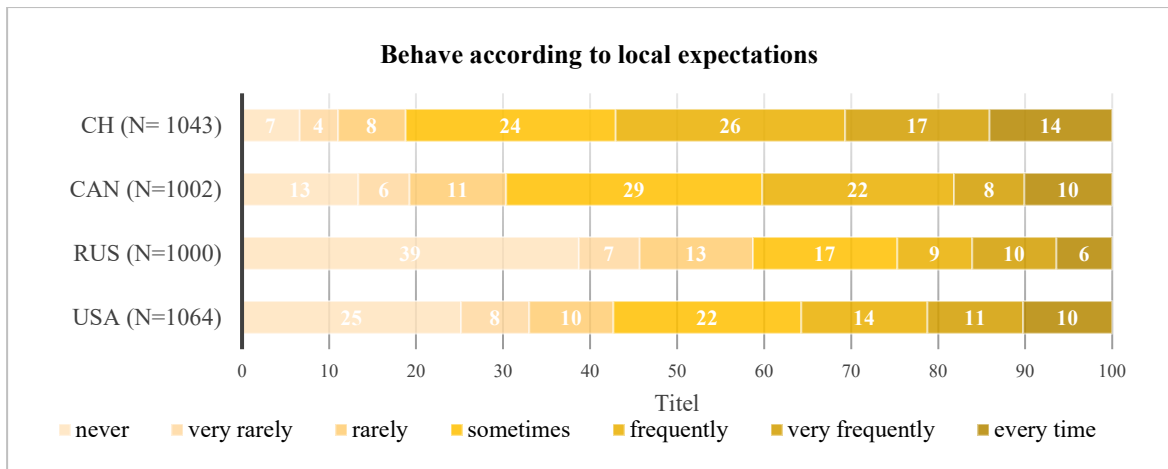
Significant differences could be observed about habits adapting to the destination's local customs to try and behave according to local expectations (Figure 15). In total, 57% of Swiss respondents indicated to “frequently to always” do this compared to 40% of Canadians and 36% of Americans. Only 24% of Russians responded to invest the effort to study local customs at the destination.

The expectation of adapting one’s dress style to meet local expectation at the destination is important in many cultures. The habit of doing so was the highest amongst Swiss (45%) and Americans (39%) for the categories “frequently to always” combined (Figure 16). On the other hand, adapting to the local dress style was commonly practised by 30% of Canadian and only by 13% of Russian respondents.

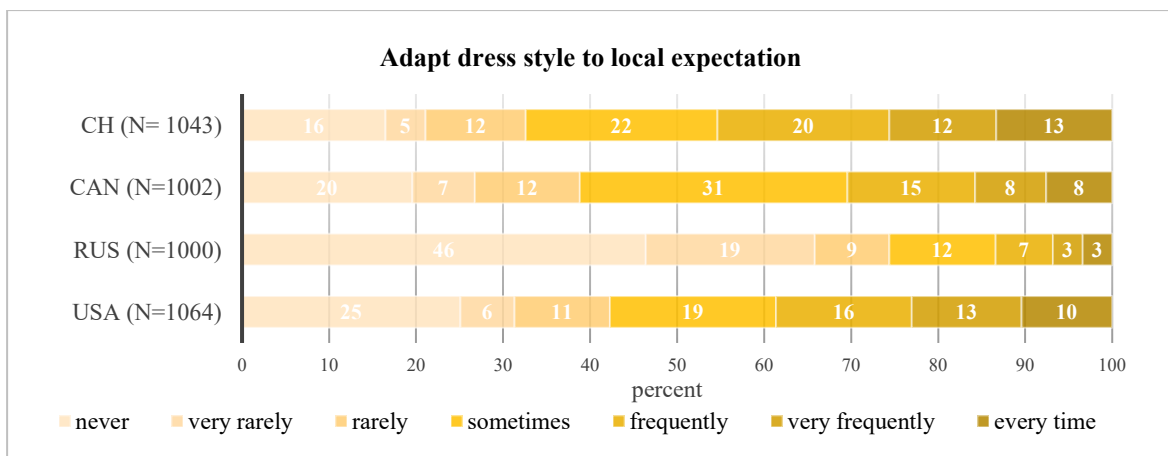
**Figure 14: Try using the local language at the destination**



**Figure 15: Study the local customs of your destination to try behave according to local expectations**

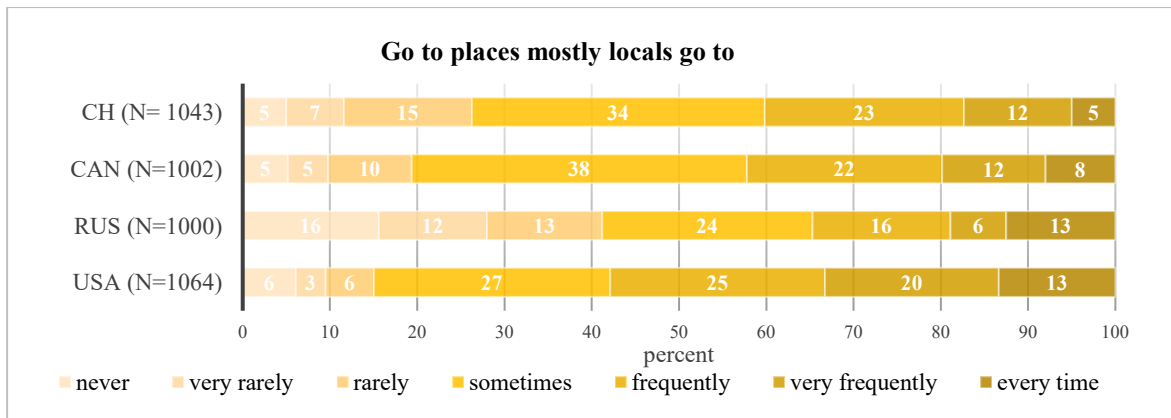


**Figure 16: Adapt your dress style to meet the expectation of local people at the destination**



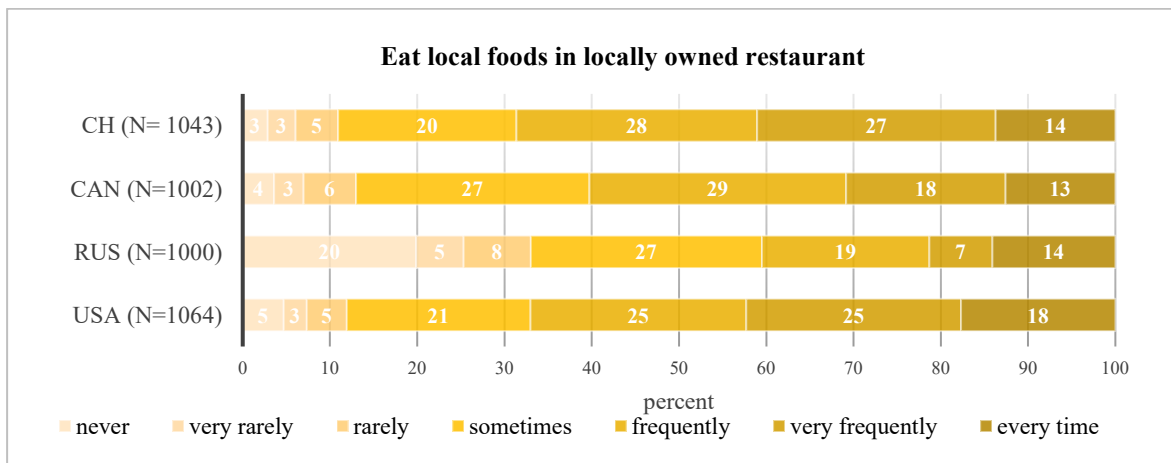
Seeking out places at destinations where residents spend their leisure time is a part of an authentic visitor experience. The Barometer asked to what extent people go to places where locals go, specifically with only few tourists present (Figure 17). This was practised most by Americans (58%), compared to Canadians (42%) and Swiss (40%) and Russians (35%) for the categories “frequently to always” combined.

**Figure 17: Go to places mostly locals go to (or very few tourists)**



Eating local food in restaurants is also part of an authentic visitor experience at any destination. In this context, the Barometer asked respondents to indicate the frequency of this habit instead of going to internationally branded places or to restaurants that serve the usual foods one chooses. Based on the findings in Figure 18, this was important to all four nationalities surveyed. However, it was most done by Swiss (69%), Americans (67%) and Canadians (60%) and least by Russians (41%) for the categories “frequently to always” combined.

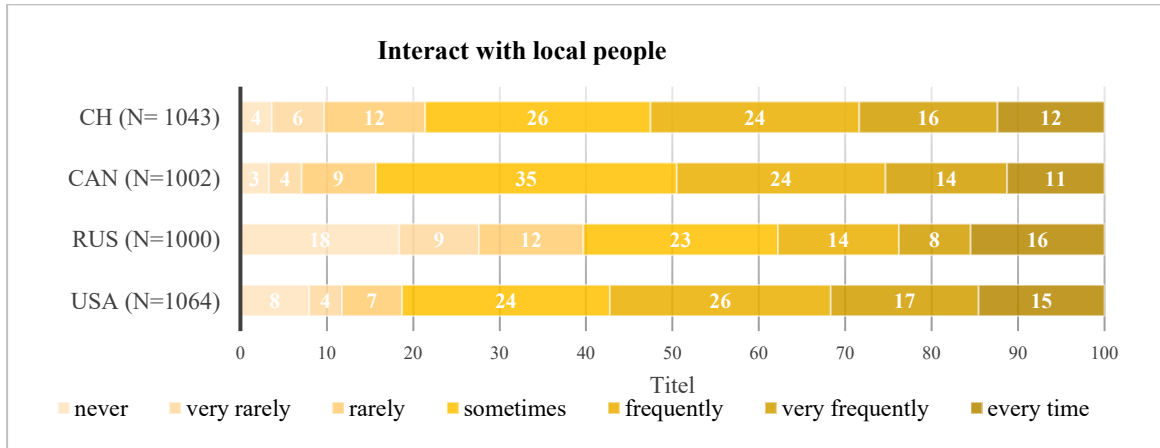
**Figure 18: Eat local foods and specialties in locally owned restaurant (instead of international food and your usual preferred foods in known branded places)**



Interacting with local people at the destination (besides those working in the tourism sector) is also part of a unique and authentic visitor experience. This was most frequently experienced by Americans (57%), Swiss (53%) and Canadians (50%) compared to Russians (38%) for the categories “frequently to always” combined (Figure 19).



**Figure 19: Interact with local people at your destination (besides with those serving you at restaurants, hotels etc.)**



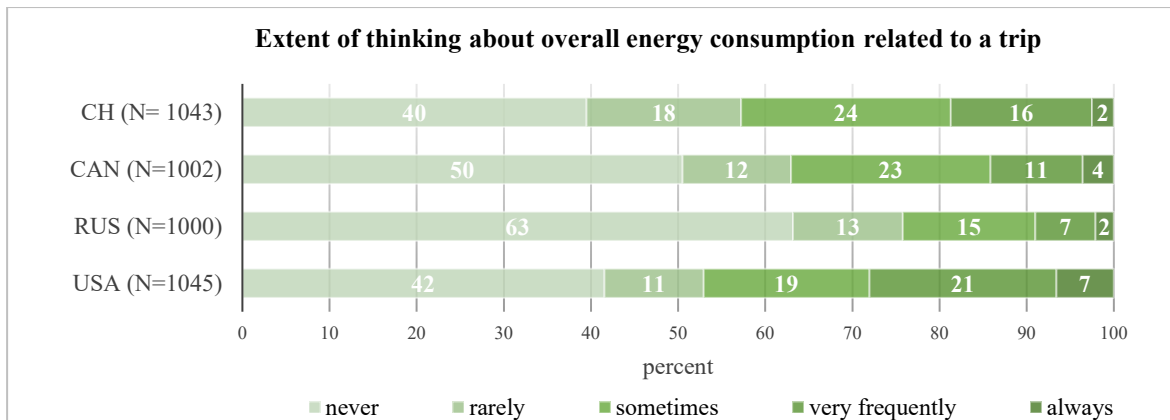
### 3.8. Environmental Behaviour at the Destination

Visitors contribute to numerous environmental issues at all phases of a trip. The problems can be broadly categorised to relate to waste outputs (all types including emissions), water use, landscape impacts and biodiversity loss. The significance and intensity of these impacts can vary significantly amongst destinations due to the type and number of visitors, the fragility of the ecosystems, the type and amount of infrastructure, the level of management and many other factors. The UNWTO’s responsible tourist guideline (2016) includes a set of environmental actions under the theme “protect our planet”. In this context, the Barometer included questions around this theme to gauge what people actually “do” at destinations to reduce any adverse environmental impacts.

#### Energy and Emissions

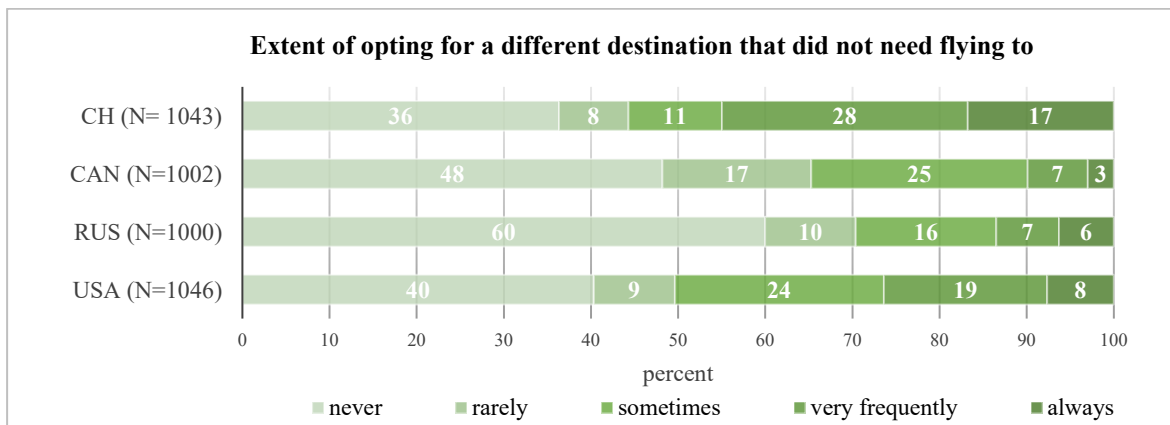
Energy used for travel and tourism activities has various environmental impacts, including greenhouse gas emissions. This remains one of the most significant issues from travel and tourism activities. The issue arises from travel activities (airlines, trains, cruises, and tour operators) and accommodation use with fewer contributions from all other tourism services. Therefore, sustainable tourism standards require minimising energy use and reducing the corresponding emission outputs. However, based on the findings of the Barometer, significant proportions of respondents “never” even think about the extent of their overall energy consumption (therefore emission impacts) related to a trip (Figure 20). In order of importance, the Swiss and Americans consider this the most and Canadians and Russians the least.

**Figure 20: Extent of thinking about overall energy consumption related to a trip**



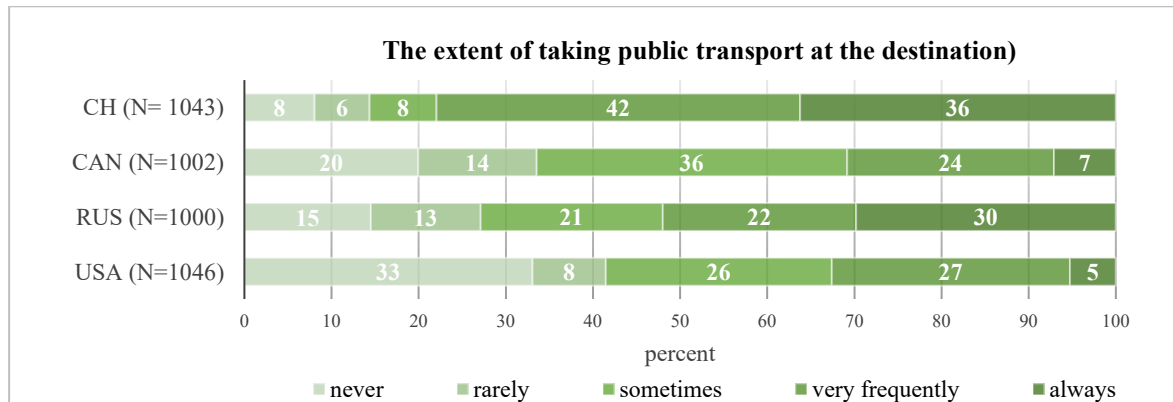
Given that flying is the most energy-intensive forms of travel, the Barometer asked respondents the extent to which they considered opting for a different destination to avoid flying. Based on the findings of Figure 21, the Swiss considered this the most, followed by Americans, Canadians, and Russians. The results show significant differences amongst responses, where 45% of Swiss responded to “very frequently to always” consider a tourism destination that did not need flying to. This rate was much less for Americans (26%) and even much less for Russians (14%) and Canadians (10%).

**Figure 21: Extent of opting for a different destination that did not need flying to**



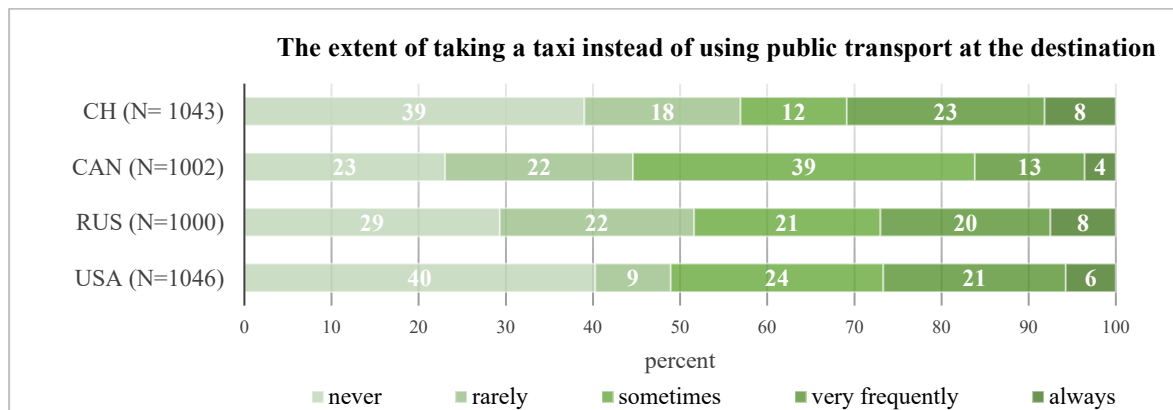
Taking collective or public transport (even when a taxi could be an option) is one of the best ways to reduce emission impacts from travel at the destination. The Barometer also asked the extent to which this was a habit. Based on the findings in Figure 22, this was done mainly by the Swiss and Russians. Both Canadians and Americans used public transport much less. For the categories “very frequently to always” combined, the rate of public transport use at the destination was 78% by Swiss, 52% by Russians, 33% by Americans and 31% by Canadians.

**Figure 22: The extent of taking public transport at the destination even if taxi is an option**



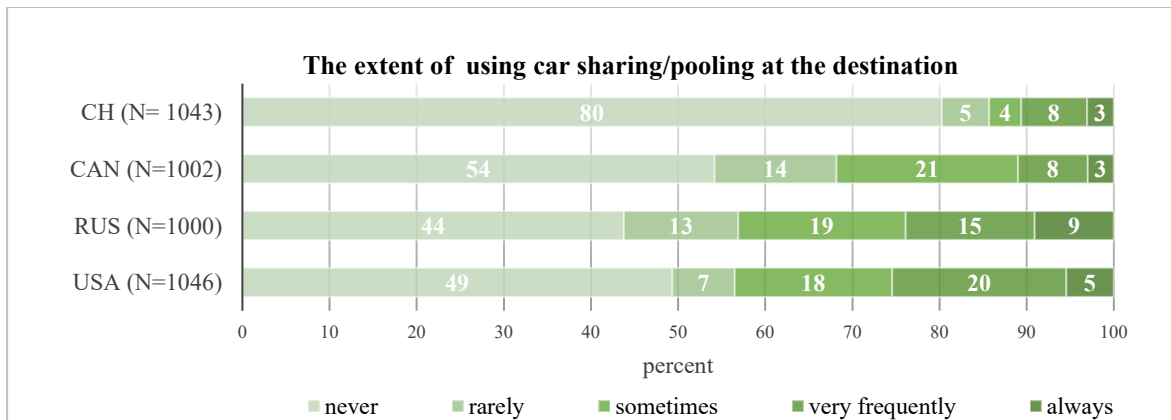
The Barometer also asked respondents to indicate the extent to which a taxi was taken when public transport was an option. The findings in Figure 23 show that this was done mostly by the Swiss and Russians and somewhat less by Americans and Canadians. For the categories “very frequently to always” combined, 31% of Swiss opted for a taxi at the destination instead of public transport compared to 27% of Russians and Americans and 16% of Canadians.

**Figure 23: The extent of taking a taxi instead of using public transport at the destination**

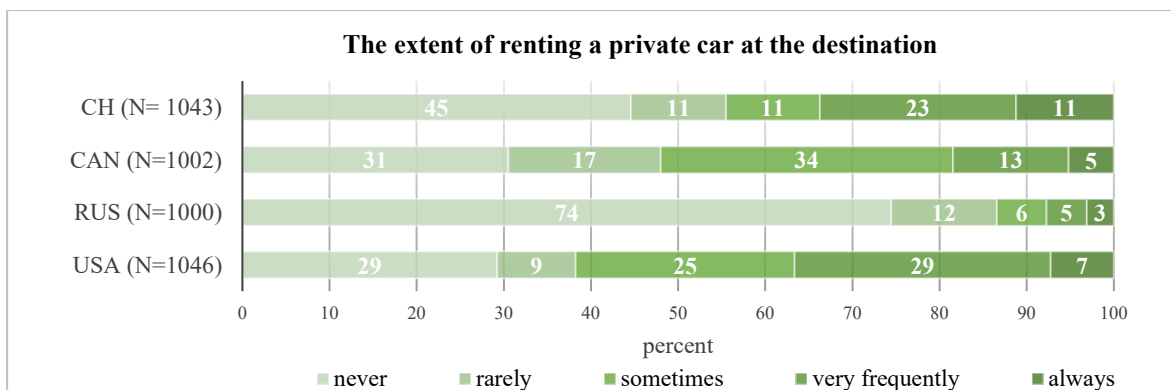


Respondents were also asked about the extent of using car-sharing (if an option) at the destination. Based on the findings in Figure 24, this was mostly done by Russians and Americans and less by Canadians and significantly less by the Swiss. Similarly, the extent of rented private car use was asked from respondents where Americans, Canadians and Swiss were very similar in their habits compared to 75% of Russians who never rent a car at the destination (Figure 25).

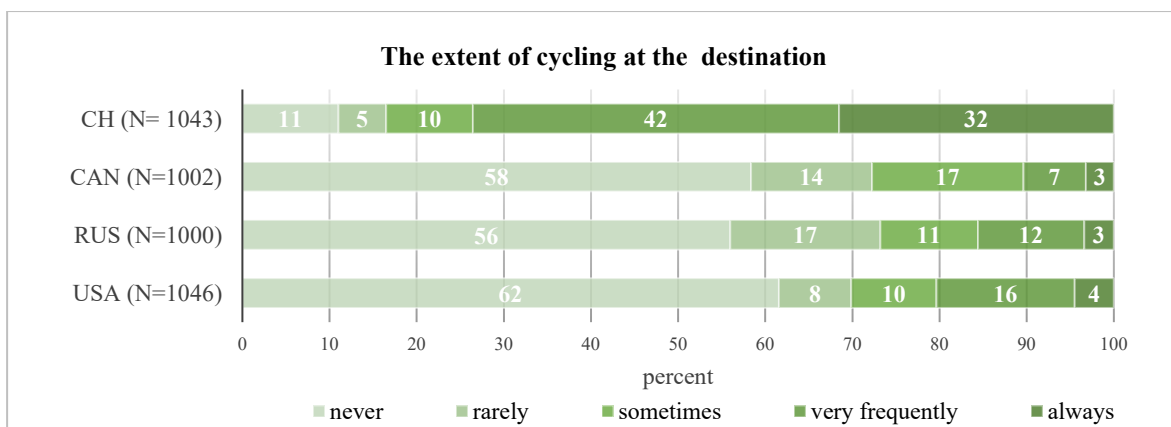
**Figure 24: The extent of car sharing/pooling at the destination**



**Figure 25: The extent of renting a private car at the destination**



**Figure 26: The extent of cycling at the destination**



Cycling is a low environmental way to explore a destination. Based on the findings in Figure 26, the Swiss cycle significantly more on a trip compared to Russians, Americans, and Canadians. Based on the survey, 32% of Swiss indicated to “always” cycle compared to less than 5% for the other nationalities.

### **3.9. Emission Offsetting**

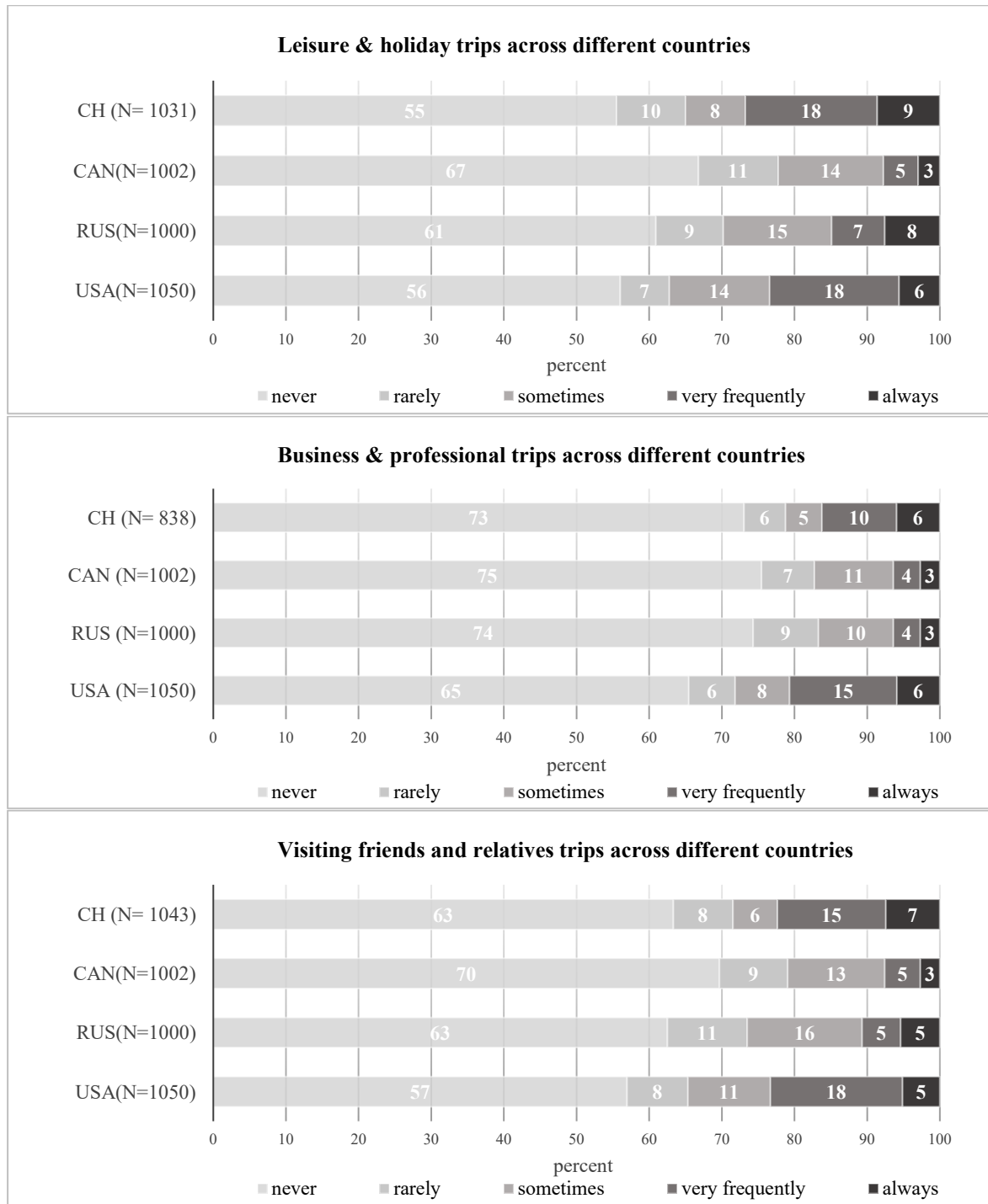
Unavoidable emissions are recommended to be compensated by the purchase of offsets, which directly provide funds for various renewable energy, efficiency, and sequestration projects. According to the findings in Figures 27 and 28, most respondents did not compensate for emissions. Considering business travel-related compensations, Americans compensate the most (21%) “very frequently to always” combined (Figure 27). Next, it is the Swiss (16%), followed by Russians and Canadians (6% each).

Based on the findings, more travel emissions are offset in a leisure context, but the trend was very similar compared to business travel. The Swiss reported to offset most of their leisure trips (27%) followed by Americans (23%) and then Russians (15%) and Canadians (8%).

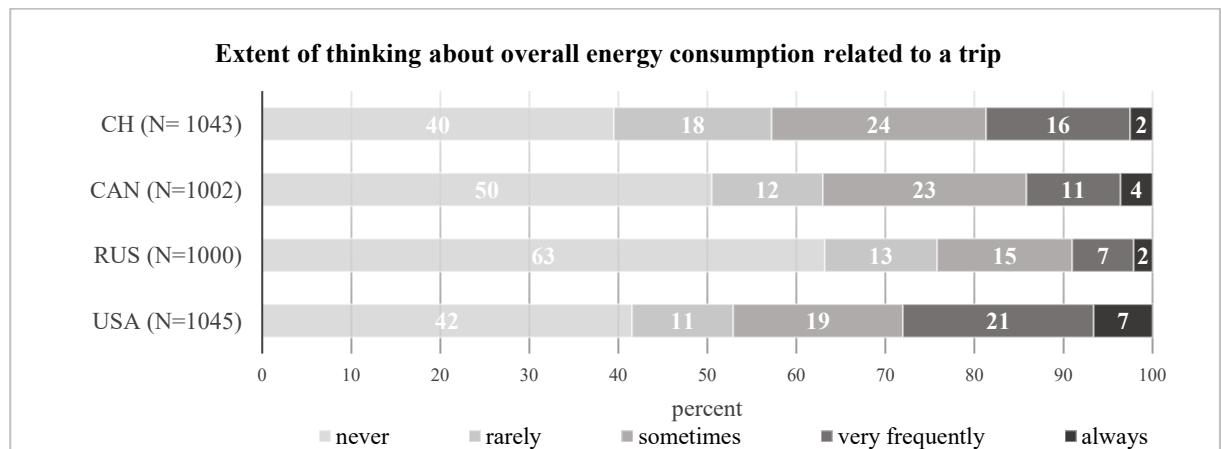
Emission offsetting in context of visiting family and friends, 23% Americans compensated compared to 22% Swiss. Only 11% of Russians and 8% of Canadians offset this type of trip.

Based on the findings of this study, respondents generally compensated emissions related to accommodation less compared to travel. According to Figure 28, emission offsetting for accommodation was mostly done by Americans (24%) and significantly less by Canadians (9%), Swiss (2%) and Russians (4%).

**Figure 27: Extent of trip emission offsetting from business & professional trips across different countries**



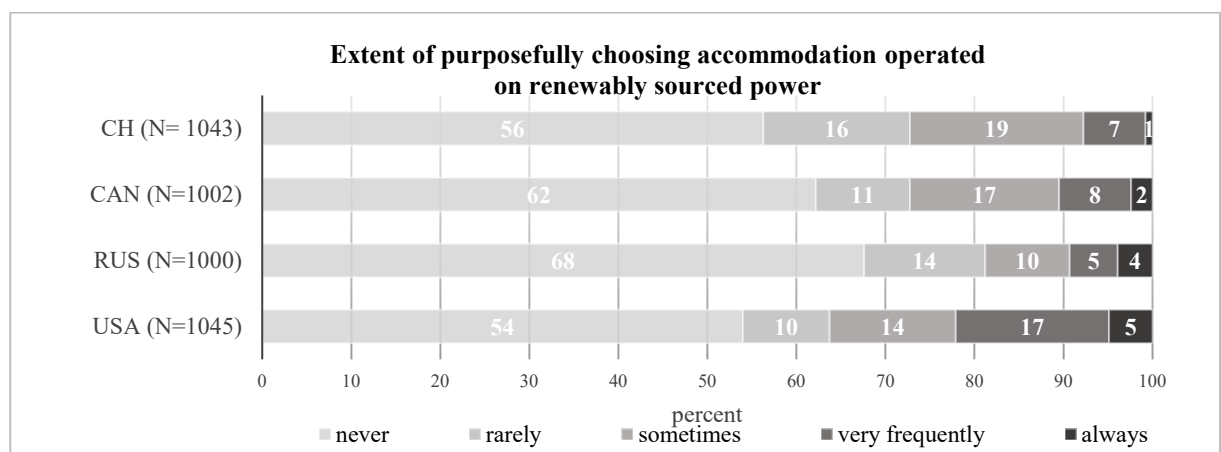
**Figure 28: The extent you did purchased offsets to compensate the overnight stays**



**3.10. Energy use in accommodation establishments**

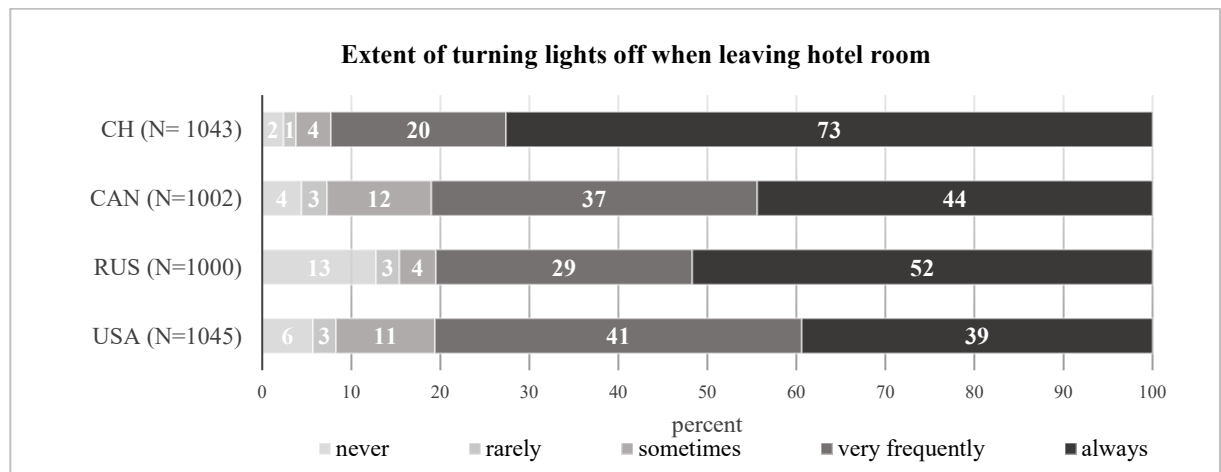
As energy use in the built environment can be around 20% or more of tourism related greenhouse gas emissions, it is important to determine how guests approach this issue in terms of offsetting. According to Figure 29, well over half of all respondents never compensate any accommodation related emission. Combining the “frequently to always” categories, the findings show that 22% American respondents compensated their accommodation, followed by 11% Canadians, 9% Russians and 8% Swiss.

**Figure 29: Extent of purposefully choosing accommodation operated on renewably sourced power (e.g. solar, wind or others)**

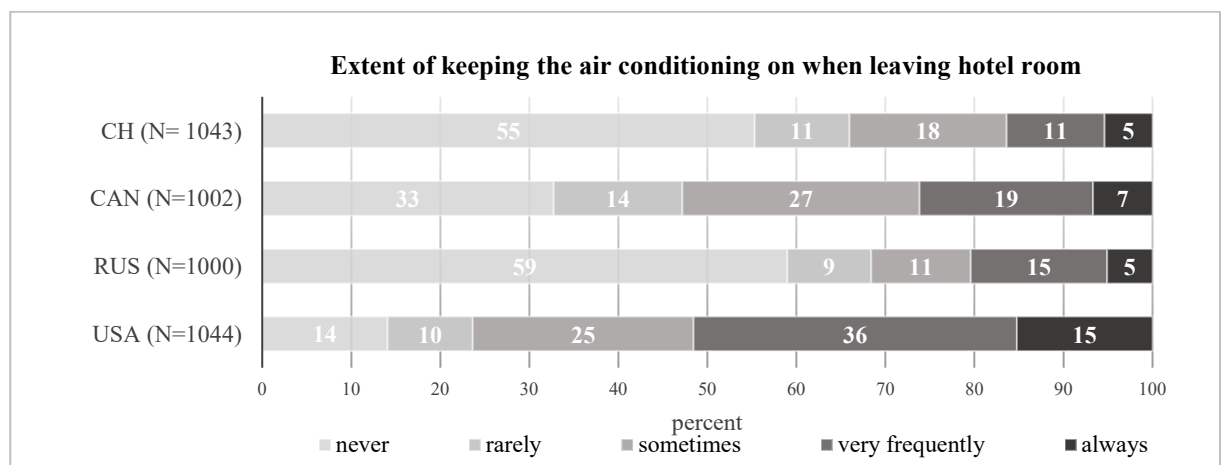


Turning lights off when leaving a room appears to be a “done” thing by the great majority of all respondents surveyed (Figure 30). As to the question of “keeping the air-conditioning (AC) on when leaving a room” a significantly larger difference is notable amongst the respondents (Figure 31). Based on the findings, Americans and Canadians appear to be turning the AC off when not in the room, which did not seem to be the case with Russians, and Swiss respondents since over 50% of each of the latter group indicated to “never” do this.

**Figure 30: Extent of turning lights off when leaving hotel room**



**Figure 31: Extent of keeping the air conditioning on when leaving hotel room**



### 3.11. Solid Waste

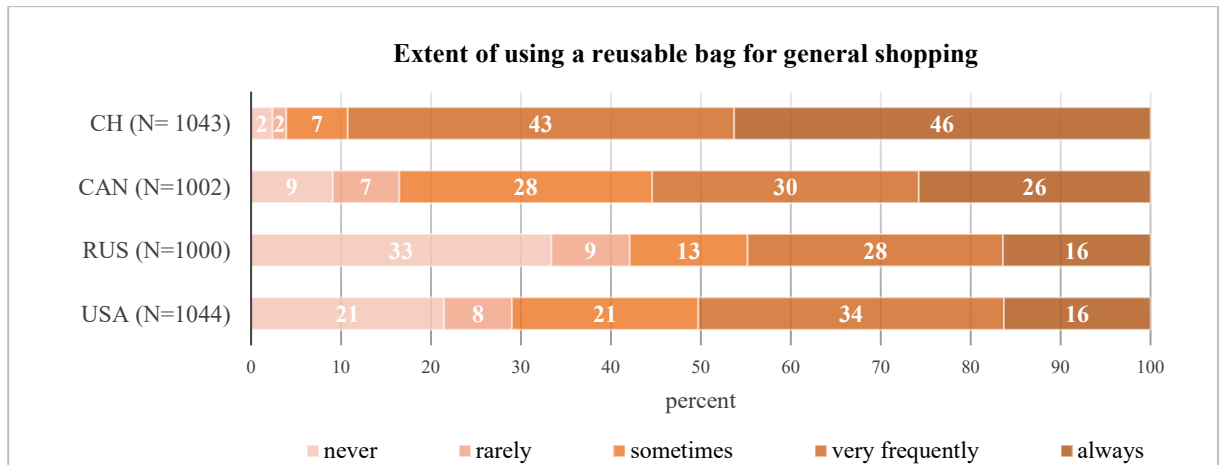
Tourists contribute to various types of solid waste. Depending on local infrastructure, this can be a considerable burden on destinations and cause undesirable visual impact for everyone. For all stakeholders, the general avoidance of any solid waste is a basis for sustainable tourism. Therefore, tourists need to be constantly aware of this responsibility, and actively avoid substantial waste contribution, regardless of destination.

Actions to achieve less solid waste on a trip can include many things with relatively little effort such as taking a foldable, reusable shopping bag, a refillable drink bottle. It can also include taking only what one will really eat from buffets or ordering just enough from a menu. The possible ways to avoid contributing to solid waste is much more extensive than these examples, but they indicate “effort” to be responsible. These efforts need to accompany by appropriate solid waste disposal, including recycling. Unfortunately, waste management facilities are not consistently provided at destinations.



Taking a reusable shopping bag and refillable a drink bottle on a trip could help avoid solid waste contributions, particularly at destinations where waste management facilities are limited or not present. These two habits were comparable amongst the four nations surveyed (Figures 32 and 33). In total, 24% of Swiss “always” used their own shopping bag and refillable drink bottle on a trip, compared to 22% of Canadians, 18% Americans and 10% Russian respondents (Figure 32 and 33).

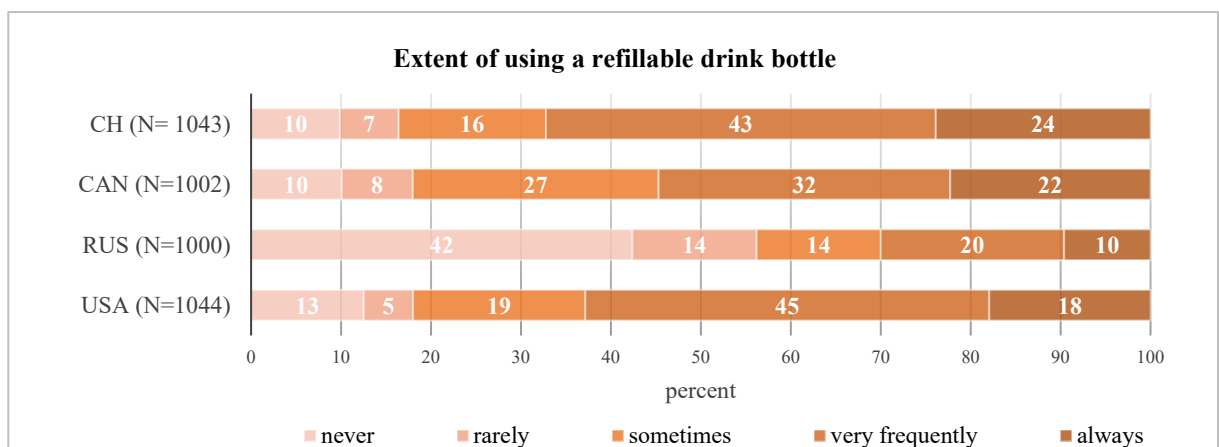
**Figure 32: Extent of using a reusable bag for general shopping**



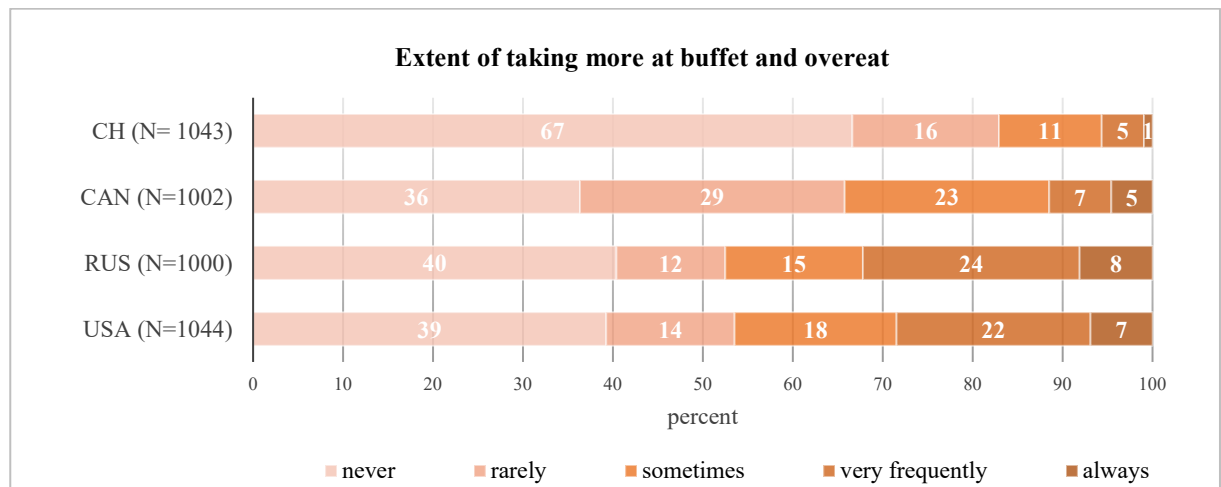
The habit of taking more food at buffets appears to be commonly done by all respondents. It was reported to be “always” the case by 1% of Swiss, 5% of Canadians, 7% of Americans and 8% by Russians (Figure 34).

The extent to which respondents recycled on trips “where possible” varied (Figure 35). Almost all Swiss respondents recycled to some extent on a trip, where 69% indicated the case to be “always”. In total, 44% of Canadians “always” recycled on a trip” compared to 23% of Americans and 4% Russians.

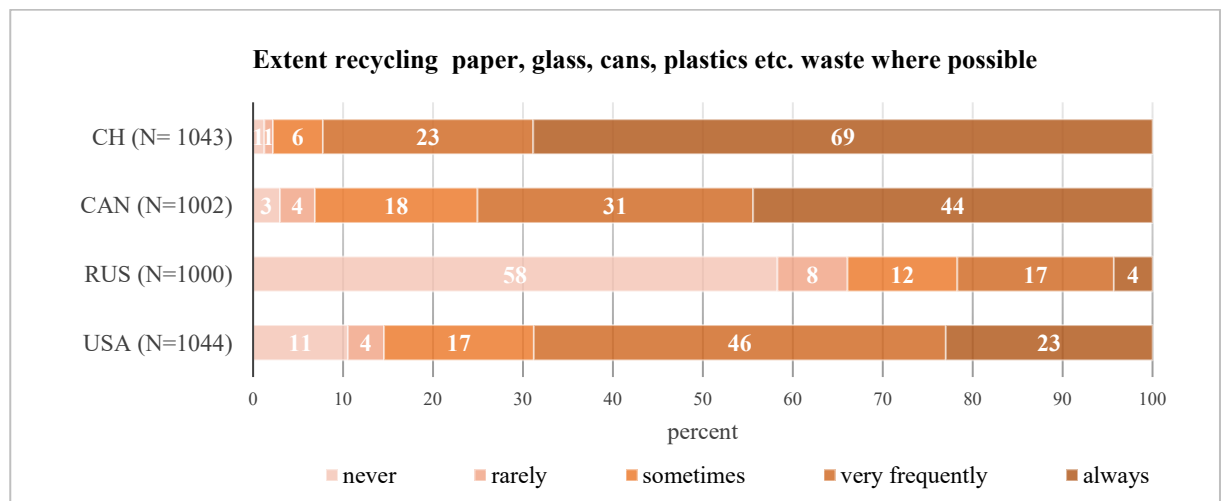
**Figure 33: Extent of using a refillable drink bottle**



**Figure 34: Extent overeating and taking more food than needed at buffet**



**Figure 35: Extent recycling paper, glass, cans, and plastic waste where possible**

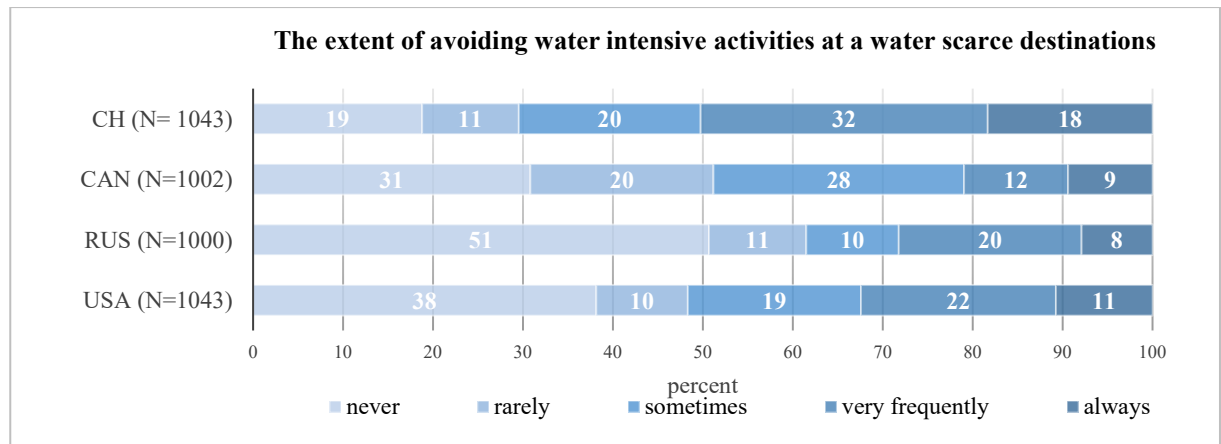


### 3.12. Water

Water scarcity is an issue at many destinations and tourism activities can significantly contribute to this issue. Therefore, minimising unnecessary water use is a requirement of sustainable tourism for all stakeholders. To obtain an insight about how tourists behave using water, several questions were included in the Barometer to signal actions that may demonstrate visitor responsibility.

Avoiding water-based activities at destinations with water availability issues is a recommendation. The extent to which tourists engage in this shows environmental awareness. As Figure 36 shows, there was a significant difference in habits when avoiding activities such as taking baths, using spas, and playing golf at water-scarce destinations. Based on the survey, the Swiss appeared to be the most conscious, followed by Americans and Canadians. In total, 51% of Russians never avoid water-based activities at water-scarce destinations, compared to 38% Americans, 31% Canadians and 19% Swiss.

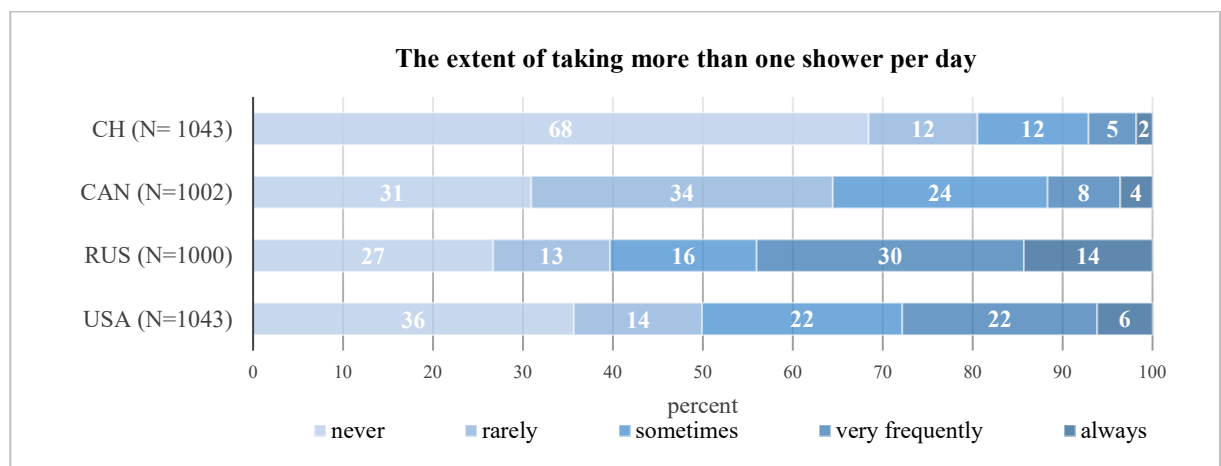
**Figure 36: The extent of avoiding water intensive activities at a water scarce destination (e.g. deserts) such as taking baths, using a spa, playing golf etc.**



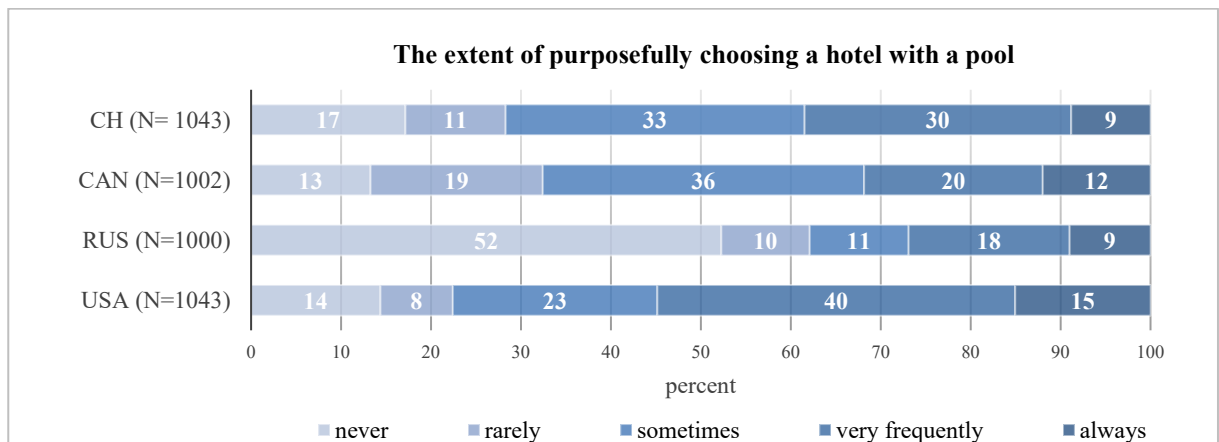
Taking “short showers” and “as few as possible” can limit water use at destinations with limited resource supply. Based on the findings, this action was done by some participants surveyed (Figure 37). Nonetheless, participation was low by the Swiss as 69% of responded “never” avoiding taking more than one shower a day compared to 36% Americans, 31% Canadians and 27% Russians.

Purposefully choosing a pool signals the importance of water to tourists. Based on the findings on Figure 38, this appears to be an important factor of accommodation choice by most respondents to some extent in Canada, USA and in Switzerland. In contrast, 52% of Russians indicated “never” purposefully to choose accommodation with a pool (Figure 38).

**Figure 37: The extent of taking more than one shower per day**

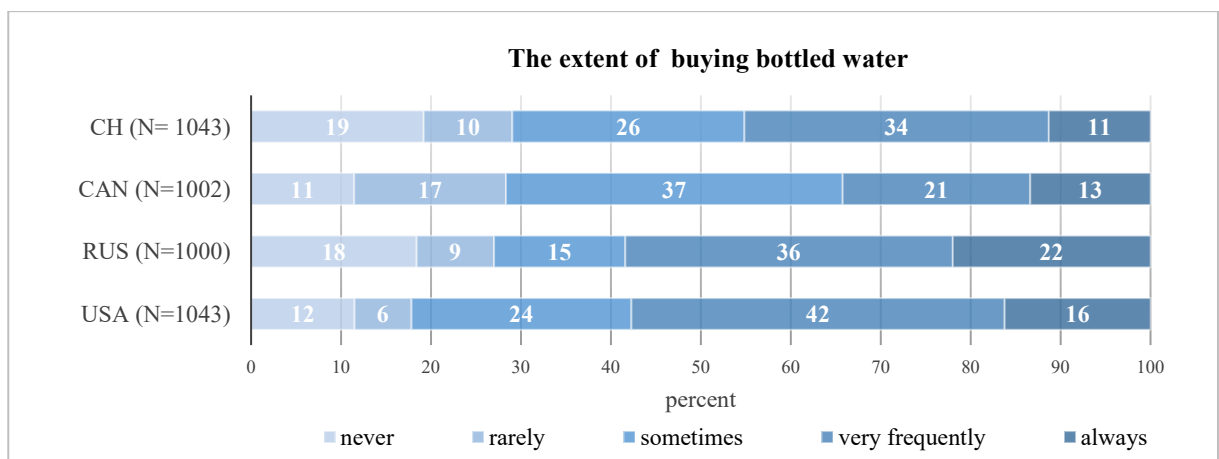


**Figure 38: The extent of purposefully choosing a hotel with a pool**



Buying bottled water may be necessary depending on many factors, including personal habits, circumstances of a visitor, such as activities undertaken. Some destinations have limited or no potable water supply, making buying bottled water and other drinks a necessity. Based on Figure 39, buying bottled water is a habit by most respondents from the four countries. In total, 22% Russians “always” buy bottled water, compared to 16% Americans, 13% Canadians and 11% Swiss.

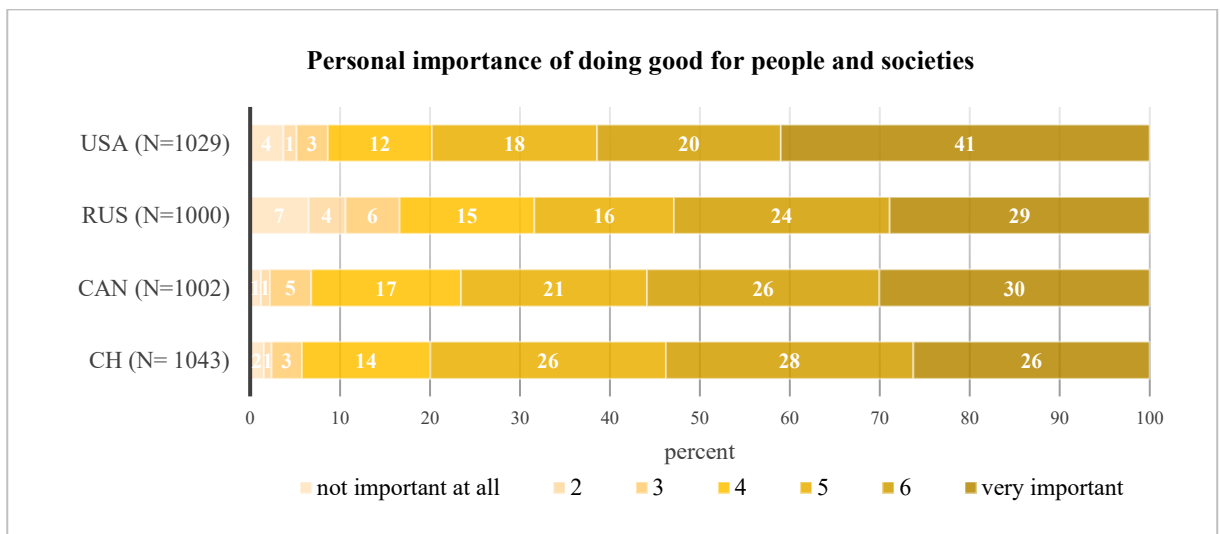
**Figure 39: The extent of buying bottled water**



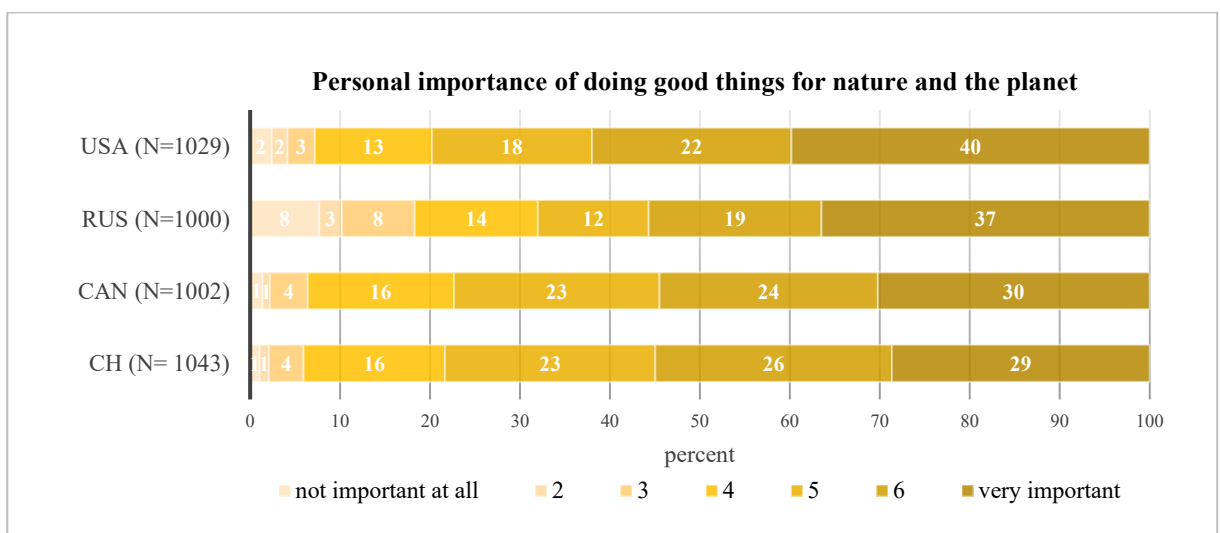
**3.13. Importance of “doing good things”**

Visitor intentions may reflect general attitudes even though good intentions do not always lead directly to good actions for a range of reasons. However, it is still worthwhile to measure where tourists set importance, as it may help design policies where tourists are part of a “solution” instead of just being a part of an “issue”.

**Figure 40: Personal importance of doing good for people and societies**



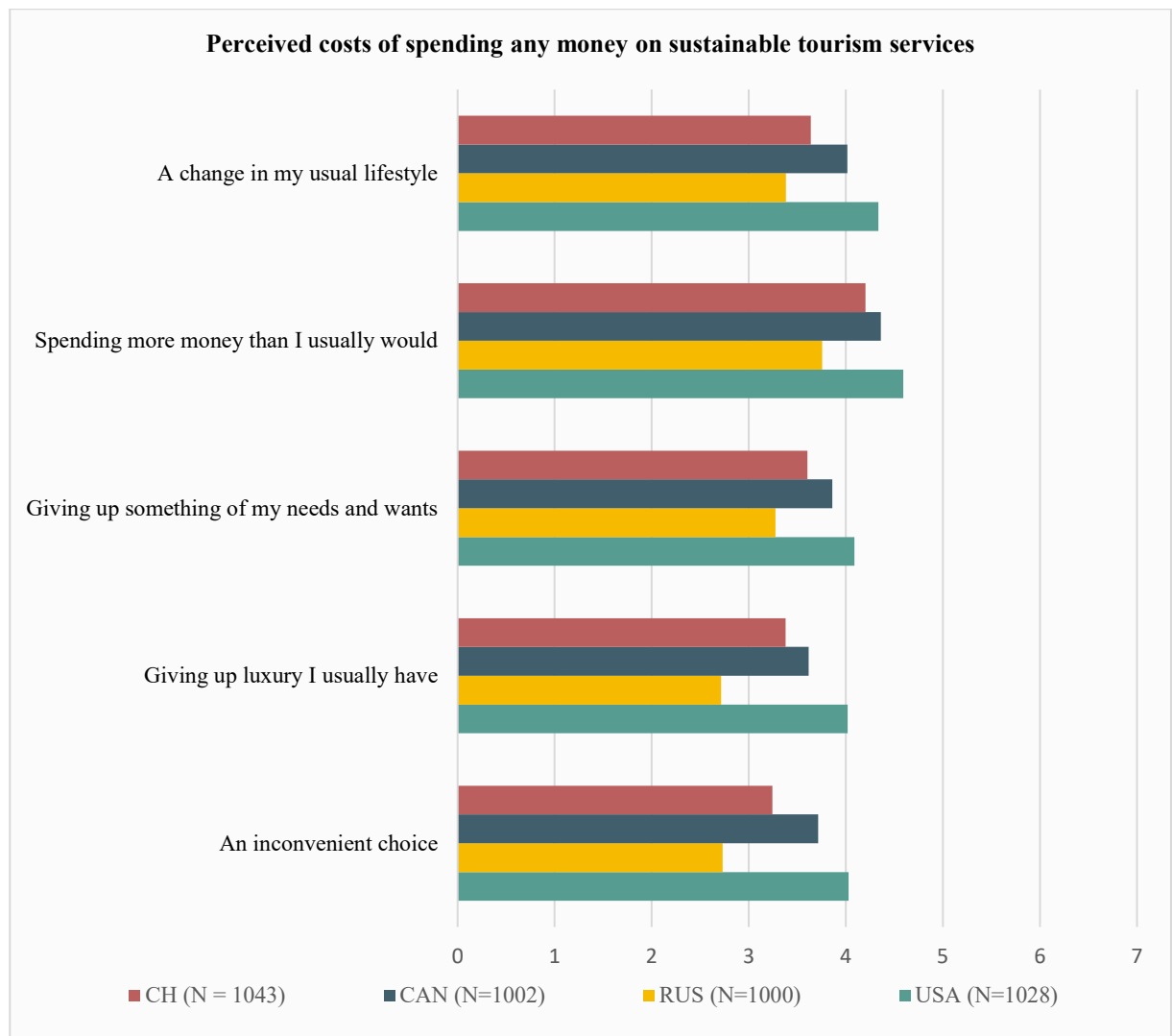
**Figure 41: Personal importance of doing good things for nature and the planet**



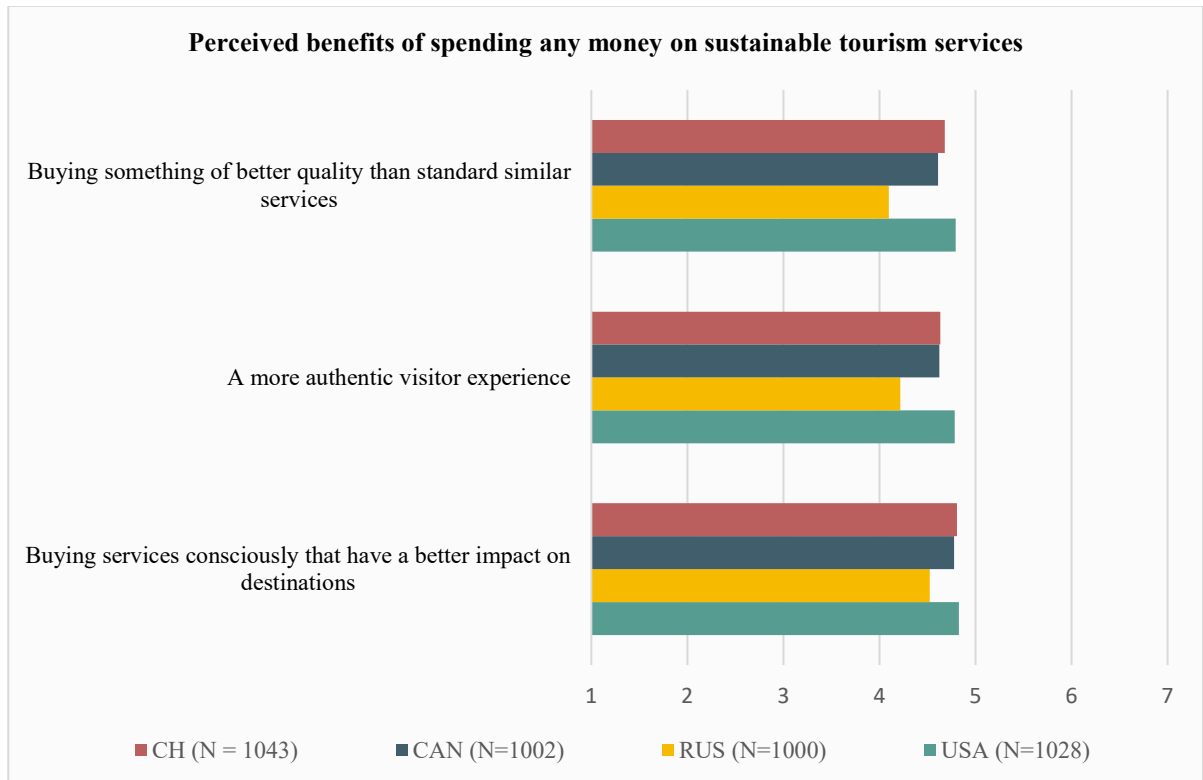
**3.14. Cost and benefit perceptions of sustainable tourism services**

The cost of sustainably managed tourism services tends to be different from standard alternatives, but this has not yet been systematically investigated amongst products, quality categories and destinations. Similarly, there are studies lacking that systematically show how consumers perceive sustainable tourism products and services. Numerous willingness to pay studies demonstrate a very marginal interest to pay premium prices for sustainable tourism services (López-Sánchez & Juan Ignacio Pulido-Fernández, 2017). In this context, the Barometer included questions to determine respondent attitudes about the costs of sustainable tourism services (Figure 42). The findings reflect a general attitude that one needs to spend more money on sustainable tourism services. This consumption represents a lifestyle change, giving up something and, overall, rather an inconvenient choice. For all “cost” items, the respondent indicated a value higher than three. Comparing the perceived benefits of spending money on sustainable tourism services, the results show a “high” levels of benefit perceptions (consistent values of four and greater) for all items. Contributing to environmental actions to reduce emissions ranked highest (mean=4.93 on a 7-point scale).

**Figure 42: Perceived costs of spending any money on sustainable tourism services (such as accommodation, tours, excursion, visiting attractions etc.)**



**Figure 43: Perceived benefits of spending any money on sustainable tourism services (such as accommodation, tours, excursion, visiting attractions etc.)**



## 4. Conclusions

The Barometer study was developed on the frameworks of the Global Sustainable Tourism Criteria and the UNWTO's Guidelines for Responsible Travel. This report documents a pilot trial of the Barometer with a sample size of 4150 respondents. It provides measured insights about sustainable consumer attitudes and actual behaviour in a travel and tourism context from Canada (N=1002), Russia (N=1000), Switzerland (N=1043) and the USA (N=1105). In addition, the study highlights some similarities and differences between these four markets.

The main strengths of this study include the following: a) the conception of a basic framework to define and measure sustainability-related attitudes and actions amongst geographically and socio-demographically distinct consumer groups, b) the ability to provide cross-market analysis covering the three dimensions of sustainable tourism, c) the ability to compare and contrast consumer profiles according to the purpose of travel and various other criteria, and d) the adaptability of the framework to different international market survey instruments to include essential sustainability-related information.

The main weaknesses of the study relate to a) the relative simplicity of the questionnaire method used, b) the limited "common" meaning and interpretation of complex sustainability issues amongst socio-cultural groups surveyed in the different countries, c) the limited comparisons and statistical analysis to establish cause-effect relationships between attitude and behaviours amongst respondent groups or segments, and d) the costs of administering such complex surveys despite the ease and efficiency of contemporary digital developments.

### 4.1 Key learnings about the combined sample

- All four respondent groups showed relative high-frequency travel patterns for business and private purposes. Over 10% of all respondents took over five trips with at least one overnight for leisure and holidays.
- Over half of all respondents were very familiar with the meaning of sustainable tourism.
- For most of the respondents, sustainability plays no or a minor role in trip planning.
- Regardless of the purpose of travel, about 30% take no time or effort at all to search for sustainability-related information. However, between 5 to 10 % of respondents spend a lot of time and effort on this.
- About 50% of the respondents occasionally check sustainability certifications of a tourism product and service, while about 50% never does this. Less than 7% of respondents "always" check for certificates and labels.
- The influence of certifications and labels on the booking process is somewhat limited. The importance varied amongst survey groups. Overall, it is "very important" in booking decisions for up to 15% of respondents.
- The top social concerns at destinations included exploitation of children, crime and overcrowding.
- The top socio-economic concern at destinations included unfair treatment of staff and employees working in tourism, fair worker payments and not enough locally sourced foods in hospitality businesses.
- The top environmental concerns included overuse of water at destinations, chemicals polluting soils and waterways and the extent of recycling.
- When planning a trip, respondents considered the negative impacts of travel and tourism, mostly when travelling for leisure or visiting friends and relatives. However, when travelling



for business, over 60% of all respondents “never” considered negative impacts that may arise from the trip.

- Responsible social behaviour at the destination varied amongst respondents. Eating local foods, meeting locals, and interacting with locals on purpose rated most highly.
- Responsible environmental behaviour associated with a trip varied amongst respondents. Taking public transport at the destination instead of a taxi or rented car rated amongst some of the most pursued “good deeds” followed by turning lights off in unoccupied rooms and using reusable items such as shopping bags and drink bottles.
- “Doing good” for the planet, people and societies was predominantly “very important” to all surveyed.
- Respondents had mixed perceptions about the non-financial cost of sustainable tourism services and their values and benefits.

#### **4.1.1. Key learnings about Canadians**

Canadians, in general, are concerned about the planet and the environment. However, their beliefs do not necessarily always translate into actions. Critical concerns for Canadians are higher regarding social issues such as crime and cultural heritage protection. Yet, matters relating to the recent phenomena of overtourism such as crowding and the voice of local people are growing in importance to travellers. Although a third of Canadians understood what sustainable tourism meant, little time was spent searching for information about sustainable travel. This showcases the need for DMO’s and tourist sites to provide information about responsible behaviour, especially as certification is not an influencer.

Waste conservation practices such as using a refillable water bottle and recycling were the most common behaviours among Canadians. However, social changes, such as local interaction and eating local food, were becoming more common. This may reflect Canadian society at large, which has a relatively strong norm for these environmental behaviours and suggests that easy or everyday actions at home may translate into practice when travelling.

Finally, the findings reflect a contradictory attitude on the cost of sustainability. Although 40% of respondents said they did not feel they had to give up luxury to purchase sustainable tourism products, one third (31%) believed they would have to spend more money than usual. Portraying the benefits of sustainability is an important message which needs showcasing as Canadians feel that making sustainable choices contribute to environmental actions and conscious purchasing choices.

#### **4.1.2. Key learnings about Russians**

Sustainable tourism is considered increasingly important in Russia, as it is perceived to boost economic well-being, developing attractions and regions. This study highlights that Russian travellers are also aware of concepts relating to sustainable tourism. Results showed that not all respondents had an equal appreciation of the sustainability notions. The idea of sustainable tourism itself remains challenging to understand, as it is unknown to many Russians in general. Traditionally in Russia, all aspects of sustainability were studied separately in various disciplines relating to the natural and social sciences and economics.

At present, a transformation is taking place, particularly within scientific circles, to shift towards an interdisciplinary understanding of sustainability. According to the findings of this study, the Russian travel market shows significant potential to develop, which could be promoted through the mass media

and all relevant stakeholders from the recreation and tourism sector. In the current situation, the role of different social institutions and universities, which execute educational function, is vital. They can help to shape conscious and rational behaviour, especially among the younger generation, who represent a significant potential on the world tourism stage.

#### **4.1.3. Key learnings about the Swiss**

The Swiss showed a sound level of understanding of sustainable tourism and medium to high-level concern for most tourism caused socio-economic and environmental impacts. This market has a relatively reasonable level of sustainability awareness in many areas. Almost 20% also consider sustainability when planning a trip, particularly in leisure and visiting friends and family context. Nonetheless, actual sustainability actions are taken sporadically in different contexts. Overall, the Swiss market has potential to improve efforts in a sustainable tourism context.

One of the common social actions at destinations is to try using the local language and behave according to local expectations. Experiencing authenticity is also important to the Swiss, shown by a high level of interest to seek out interaction with people and places where mostly locals eat. Being frequent travellers domestically and internationally, less than 25% of respondents considered transport options besides flying. Additionally, most respondents think about energy consumption related to a trip and 45% “frequently to always” opt for destinations that do not require flying to. Some of the most common ecological action reported at the destination included taking public transport even if private options are available, and using reusable drink bottles and shopping bags and recycling if the infrastructure is provided. Emission offsetting was generally done by less than 10% of Swiss respondents.

#### **4.1.4. Key learnings about Americans**

Americans have a growing awareness of sustainable tourism and sustainability issues during travel. Americans showed high levels of concern not only for environmental issues but socio-economic problems as well. Concern for socio-economic issues, notably worker welfare issues, in the destinations they visit was high. The behaviour of Americans in destinations reflect their attitude and adopt many actions that are considered pro-sustainability. It is worth noting that many travellers bring their good behaviours – such as reusable water containers and reusable shopping bags – from home. Actions less likely to be part of everyday life, such as riding bicycles, are less likely to adopt when travelling.

American travellers spend relatively little time planning for sustainability during their travels and show low commitment to investing time and effort in searching for information about sustainable travel. It is essential to recognise that while there is concern about sustainability issues, the willingness to seek knowledge is low. Tourism organisations and destination must make it easy for people to behave in pro-sustainable ways when travelling.

Finally, for US travellers, sustainable tourism represents both a significant loss and a substantial gain. Americans are concerned that sustainability will lead to higher costs and losses of luxury and convenience. Yet, as this report suggests, the US market perceived the most benefits from sustainability, including authenticity and quality tourism products and services.

#### **4.2. Implications for Future Studies**

Despite recent developments of creating a monitoring framework for sustainable tourism, substantial progress is required to measure demand aspects. There is a need to pursue a more standardised approach to collecting statistics to enable relevant market comparisons at the national or regional level. In addition, the data collected needs to be useful for stakeholders at all levels, particularly for businesses, destinations and other stakeholders.

The definition of a clear set of indicators for sustainable travel and tourism is imperative if the sector is to move towards achieving Sustainable Development Goals. Although sustainability principles require a long-term view of the future, setting up a workable set of indicators needs application at different scales and geographic destinations. As travelling consumers can drive the sustainable development of the sector, it is vital to see how their values, beliefs, attitudes, and behaviours guide their specific actions.

The Barometer here provides a simple but holistic framework that can be built upon. A repetition of this study with a revised set of questions and indicators would be needed to adapt the method. Besides the indicators measured in this report, future studies need to pay attention to creating a framework to assess the growth of sustainable tourism markets and the volume of benefits created along the value chain. Additionally, the evaluation of the “sustainable” visitor experience needs to be addressed from a consumer perspective. The evolution of new data from traditional sources and big data from social media provides diverse opportunities to define key indicators to be collected at appropriate intervals.

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## 6. Appendix: The Barometer Questionnaire

Barometer for Sustainable Travel & Tourism Questionnaire

### Q1 Please indicate which gender you identify with

- female
- male
- prefer not to say

**Q2 Please state your age in years (Textbox)** (please note only persons above 18years are permitted for this survey)).

- 18-29
- 30-44
- 45-59
- 60-79
- Above 79

**Q3 Have you taken at least one trip including one overnight or any other purpose over the last 12 months for pleasure or business?**

Yes/no (if a no will be automatically excluded from survey and will not be able to continue).

Traveler type & frequency The following questions relate to your travels in the last 12 months.

**Q4 How many times did you travel for the following main purpose involving at least one overnight stay?**

Answer scale for each travel type: never, once, twice, three to five, more than five

- a) Business/ professional
- b) Leisure/ holidays
- c) Visiting Friends and Relatives
- d) Other textbox (please indicate)

**Q5 How many of the trips were to domestic and how many to international destinations?**

Please enter in number

- a) Business & professional:
- b) Leisure & holidays
- c) Visiting Friends & Relatives
- d) Other

The following questions relate to your travels in the last 12 months.

**Q6 To what extent did you do the following in at least in one of your trip?**

Answer scale:

1=never, 2= very rarely 3 = rarely 4= sometimes 5= frequently 6= very frequently 7 = every time

- study the local customs of your destination to try behave according to local expectations?
- try using the local language at the destination?
- adapt your dress style to meet the expectation of local people at the destination?
- interact with local people at your destination (besides with those serving you at restaurants, hotels etc.)
- go to places mostly locals go to (or very few tourists)

- eat local foods and specialties in locally owned restaurant (instead of international food and your usual preferred foods in known branded places)
- support the protection of cultural heritage (examples could include UNESCO monuments, museums, community art projects etc.)
- support natural heritage protection (examples could include parks or nature area preservation, climate change funds, specific animal protection etc.)

**Q7 During planning a trip, how often did you consider the negative impacts of a trip?** (for example, emissions, waste, visiting already crowded attractions, too much foreign ownership of tourism businesses.)

Answer scale for each: using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always

- a) Business & professional:
- b) Leisure & holidays
- c) Visiting Friends & Relatives
- d) Other

**Q8 Did you ever choose NOT to go on a trip to a destination to avoid causing negative impacts?**

Please answer according to travel type and using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always

- a) Business & professional
- b) Leisure & holidays
- c) Visiting Friends and relatives
- d) Other

**Q9 To what extent did you offset emissions or buy compensation certificates for your transport related emissions (car, flight, train or others)?**

Please answer according to travel type and using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always

- a) Business & professional
- b) Leisure& holidays (Textbox)
- c) Visiting Friends and relatives (Textbox)
- d) Other (Textbox)

**Q10 Please answer according to travel type and using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always**

To what extent did you...

- a) opt for a different destination that did not need flying to
- b) take public transport at my destination
- c) rent a private car at my destination
- d) use car sharing/pooling at my destination
- e) cycle wherever possible at my destination
- f) take a taxi instead of using public transport at my destination

**Q11 Please answer according to travel type and using the scale 1=never, 2= very rarely 3 = rarely 4= sometimes 5= frequently 6= very frequently 7 = every time**

To what extent did you...

- a) think about your overall energy consumption related to the trip
- b) chose accommodation that was operated on renewably sourced power (like solar, wind or others)
- c) turned off lights when leaving my room
- d) kept the air conditioning on when I left the room
- e) purchased offsets to compensate the overnight stays

**Q12 Please answer according to travel type and using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always**

To what extent did you...

- a) used a reusable bag for general shopping
- b) used a refillable drink bottle
- c) tried to overeat at a buffet
- d) recycle my paper, glass, cans, plastics etc. waste where possible

**Q13 Please answer according to travel type and using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always**

To what extent did you...

- a) avoid water intensive activities at a water scarce destination (deserts) such as taking baths, using a spa, playing golf etc.
- b) take more than one shower per day
- c) choose a hotel with a pool
- d) buy bottled water

**Q14 Before reading the definition of sustainable tourism on the previous page, How familiar are you with the meaning of sustainable tourism?**

Answer scale: 1=not at all familiar to 7=extremely familiar

Bridge passage The United Nations World Tourism Organization defines; sustainable tourism is as "a form of tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". According to this definition: sustainable tourism aims to deliver positive benefits for people and the planet, while avoiding any negative impacts

**Q15 When you planned, your trip(s) how important were sustainability aspects?**

Answer scale: 1=not at all important to 7= extremely important

- a) Business & professional
- b) Leisure & holidays
- c) Visiting friends and relatives
- d) Other



**Q16 How much time and effort did you invest in searching for information about sustainable tourism products and services?**

Answer scale: 1= no time or effort at all 7= a lot of time and effort

**Q17 How many times did you check whether a tourism service provider had a sustainability certification?**

Please answer according to travel type and using the scale 1=never, 2 = rarely 3= sometimes 4= very frequently 5 = always

**Q18 If you find certified product and service providers, did influence your purchase decisions?**

1 = not at all important (...) 7 = very important

**Q19 How concerned are you about the following social issues that sometimes directly result from tourism?**

Answer scale: 1= not at all concerned (...) 7= extremely concerned

- a) overcrowding at destination
- b) exploitation of children
- c) gender equality
- d) degradation of local traditions and cultures
- e) protection of built cultural attractions & monuments
- f) crime at tourism destinations
- g) local people having a voice and involvement in tourism development projects in tourism regions

**Q20 How concerned are you about the following economic issues that sometimes directly result from tourism?**

Answer scale: 1= not at all concerned (...) 7= very concerned

- a) fair payment of workers
- b) unfair treatment of staff and employees
- c) not enough locally sourced food
- d) amount of profits from tourism directly benefiting the local economy
- e) limited money available to appropriately manage local attractions at a destinations
- f) not enough locally produced souvenirs

**Q21 How concerned are you about the following environmental issues that sometimes directly result from tourism?**

Answer scale: 1= not at all concerned (...) 7= very concerned

- a) amount of emissions from travel and tourism
- b) extent of recycling at a destination
- c) overuse of water at destinations affected by drought
- d) chemicals leaking into soils and waterways
- e) amount renewable energy used for operating travel and tourism businesses
- f) the extent of protected/conservation areas in tourism

**Q22 How important is it for you to do something good?**

Answer scale: 1= not important at all to 7= very important

- a) For me personally, doing good for people and societies is (...)
- b) For me personally, doing good things for nature and the planet is (...)

**Q23 If your travel destination had a special fund for better managing natural or cultural attractions, how much would you be willing to contribute to such a fund per trip (regardless of travel purpose or duration)?**

**Q24 How much did you contribute to such funds in the past year?**

Please state the amount in (local currency) ..... include a text box

Please tell us to what extent you agree with the following statements as they apply to you personally.

Answer scale: 1= strongly disagree to 7= strongly agree

**Q25 In my opinion, spending any money on sustainable tourism services (such as accommodation, tours, excursion, visiting attractions etc.) is**

- a) an inconvenient choice
- b) giving up luxury I usually have
- c) giving up something of my needs and wants
- d) spending more money than I usually would
- e) a change in my usual lifestyle

Please tell us to what extent you agree with the following statements as they apply to you personally.

Answer scale: 1= strongly disagree to 7= strongly agree

**Q26 In my opinion, spending any money on sustainable tourism services (such as accommodation, tours, excursion, visiting attractions etc.) is**

- a) buying services consciously that have a better impact on destinations
- b) a more authentic visitor experience
- c) buying something of better quality than standard similar services
- d) contributing to environmental actions to reduce CO<sub>2</sub> emission etc.,

**Q27 How much did the following Information sources influence your tourism service bookings?**

1= not at all, 7= extremely

- a) family members and friends
- b) national destination websites
- c) local tourism office websites
- d) tourism company websites
- e) social media
- f) travel agent
- g) other (text box)

**Q28 Where did you mostly overnight? Please respond for each travel purpose.**

Allow two choices for each travel type

- a) Business & professional
  - b) Leisure & holidays
  - c) Visiting friends and relatives
  - d) Other
- 
- 1. Hotels or resorts
  - 2. Holiday homes or apartments
  - 3. Private accommodation at family & friends
  - 4. Hostels
  - 5. B&B
  - 6. Motels
  - 7. Campsites
  - 8. Others

**Q29 What is your highest level of education completed?**

- a) Less than high school
  - b) High school degree or equivalent (e.g. GED)
  - c) Some college, but no degree
  - d) Associate's degree
  - e) College or bachelor's university degree
  - f) Graduate degree (e.g. Master's or doctorate)
- Which province do you come from?

**End of Survey**