



# Center for Responsible Travel

*Transforming the Way the World Travels*

Stanford University & Washington, DC

[www.responsibletravel.org](http://www.responsibletravel.org)

## Market Trends Series:

### Responsible Travel: U.S. Trends & Statistics

#### Tourism's Economic Impact

The U.S. ranks first globally for international tourist receipts and second for international tourist arrivals throughout the world in 2009.<sup>i</sup>

In 2009, \$704.4 billion in direct travel expenditures in the U.S. including international and domestic travelers.<sup>ii</sup>

In 2009, \$22.0 billion more was spent by international travelers in the U.S. than American citizens spent abroad.<sup>iii</sup>

Travel and tourism generated \$113.0 billion in direct tax revenue for U.S. local, state, and federal governments.<sup>iv</sup>

7.4 million travel-generated jobs in the U.S. in 2009.<sup>v</sup>

#### The American Ecotourist<sup>vi</sup>

Majority are between 35 and 54 years old, with a disproportionately large number between 18 and 34.

Tend to travel for longer periods.

Prefer local guides, small groups, uncrowded destinations, and meaningful educational content.

Participate more heavily in a wider variety of activities.

#### Consumer Demand for Responsible Travel in the U.S.

LOHAS (Lifestyles of Health and Sustainability) estimates that in the U.S., consumer spending for 2005 on ecotourism was \$24.2 billion (includes eco-travel and adventures, new age/spiritual travel).<sup>vii</sup>

According to a Mintel report, responsible tourism will grow by 25% year on year, while a Lonely Planet survey of 24,500 people found 93% of those surveyed intend to travel more responsibly in the future.<sup>viii</sup>

In 2007, luxury ecotourism was the fastest growing market in the tourism industry.<sup>ix</sup>

23% of travel agents have booked environmentally friendly or green travel options.<sup>x</sup>



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## Consumer Demand for Responsible Travel in the U.S. (Continued)

58% of online travelers are “concerned” about global warming and 13% were interested in buying carbon offsets.<sup>xi</sup>

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96% think hotels and resorts should be responsible for protecting the environment they operate in. 74.5% say that environmental policies of hotels influence their decision to stay there.<sup>xii</sup>

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According to a 2007 *Condé Nast Traveler* survey, 74.4% of respondents believe that hotels should be responsible for helping to relieve poverty in the local community and 73.5% say they would be willing to pay \$3 or more to stay at such a property (with 35.4% willing to pay \$10 or more).<sup>xiii</sup>

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Individuals believe that hotels should hire locals (83.7%), train locals in marketable skills (78.5%), help provide clean water (57.8%), contribute to education in the community (54.4%) in order to support local impoverished communities.<sup>xiv</sup>

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More than half (53%) of U.S. tourists surveyed agree that they have a better travel experience when they learn as much as possible about their destination’s customs, geography, and culture.<sup>xv</sup>

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55.1 million U.S. travelers are classified as “geo-tourists” or interested in nature, culture, and heritage tourism.<sup>xvi</sup>

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According to 2007 Travel Horizons Study co-authored by TIA, more than half (54 percent) of respondents stated they would be more likely to patronize hotels or resorts they know practice environmental responsibility. Specifically, they would favor

properties that actively tried to prevent beach erosion (oceanfront hotels), implemented recycling programs, allowed guests the option to reuse towels and sheets, reduced energy consumption by using energy efficient lighting/low flow toilets and showers, and supported community environmental causes. The same sentiments apply to their selection of airlines, cruise lines, attractions and, most of all, car-rental companies.<sup>xvii</sup>

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In a 2005 LOHAS survey, nearly half (49%) prefer trips with small-scale accommodations, which are run by local people.<sup>xviii</sup>

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37% of the LOHAS market say that the environmental impacts of travel matters a lot to them.<sup>xix</sup>

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66% of the U.S. adult population is interested in environmentally responsible travel.<sup>xx</sup>

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61% of U.S. travelers believe their experience is better when their destination preserves its natural, historic, and cultural sites.<sup>xxi</sup>

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Over half (62%) of U.S. travelers surveyed in 2003 say that it is important that they learn about other cultures when they travel, and 52% seek destinations with a wide variety of cultural and arts events/attractions.<sup>xxii</sup>

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The GMIGreen survey also found that 53% of respondents were influenced by a “green” rating system when selecting a hotel during 2009 travels. Another 5% were greatly influenced.<sup>xxiii</sup>

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## Green and Environmental Trends in the Tourism and Hospitality Industry

“With the threat of global warming, Marriott must do its part to conserve natural resources and reduce its environmental footprint.” *J.W. Marriott, Jr. Chairman and CEO.*<sup>xxiv</sup>

“Big picture, there is interest in ecologically sensitive corporate travel programs,” he said. “We’re seeing an increase in requests for ecological views and credentials and capabilities.” *Gregory Papajohn, American Express Business Travel.*<sup>xxv</sup>

“I get a lot of unsolicited letters from guests and I’m a little surprised by how many mention our green programs. We’ve been doing this for a while, but it seems like it’s suddenly at a tipping point.” *Michael Depatie, President and Chief Executive, Kimpton Hotel and Restaurant Group.*<sup>xxvi</sup>

“Our survey shows that green concerns have made their way on to the business traveler’s agenda. Business travelers understand the issues and are trying to do their part in being more environmentally responsible when they are on the road.”” *Adam Weissenberg, Deloitte Tourism, Hospitality & Leisure leader.*<sup>xxvii</sup>

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## The Role of Business Travel

More than 33% of business travelers "seek out hotels that are environmentally friendly." The survey says 38% have researched green lodging facilities, while 28% say they're willing to pay 10% more for green accommodations.<sup>xxviii</sup>

Business travelers expect hotels to recycle (77 percent), and use energy-efficient lighting and windows (74% and 59%, respectively). To a lesser extent, they expect hotels to give guests the option of not having sheets and towels changed every day (52 percent). Using environmentally safe cleaning products is expected by 49% of those surveyed.<sup>xxix</sup>

The *Travel Weekly* business travel survey found that although 80% of travel management companies are offering their clients the chance to offset their carbon emissions, the majority (85%) said less than a quarter of their clients are making use of the programs. However, 35% believe that in five years' time up to 50% of clients will pay to offset their carbon emissions, and 30% believe that number will climb even higher.<sup>xxx</sup>

CMIGreen found that 75% of those surveyed said that their company’s travel policies do not recommend staying at hotels with green programs. All the same, 75% said they make the same environmentally conscious choices during business travel as they do for leisure travel. 62% claimed that cost savings would motivate them to implement sustainable strategies at their next business event, while simply having more information on how to implement those strategies would motivate 66% of those surveyed.<sup>xxxi</sup>



- <sup>i</sup> United Nations World Tourism Organization. "Tourism Highlights," Edition 2007. <<http://www.world-tourism.org/facts/menu.html>>
- <sup>ii</sup> U.S. Travel Association "Economic Impact of Travel and Tourism 2009". <<http://www.ustravel.org/sites/default/files/page/2009/09/EconomicImpactofTravelandTourism2009.pdf>>
- <sup>iii</sup> Ibid.
- <sup>iv</sup> Ibid.
- <sup>v</sup> Ibid.
- <sup>vi</sup> UN World Tourism Organization (UNWTO), The U.S. Ecotourism Market, (Madrid: WTO, 2002), <http://pub.world-tourism.org:81/WebRoot/Store/Shops/Infoshop/Products/1227/1227-1.pdf>.
- <sup>vii</sup> NMI Natural Marketing Institute. "2007 LOHAS Study". <<http://www.prlog.org/10006954-new-lohas-market-size-data-released-209-billion-opportunity.html>>
- <sup>viii</sup> Travel Weekly, "Green is the New Gold". January 25, 2008.
- <sup>ix</sup> NMI Natural Marketing Institute. "NMI Reveals Top Trends of 2007." January 2007. <<http://www.nmisolutions.com/press010007.html>>
- <sup>x</sup> Travel Weekly. "Survey shows U.S. travelers not yet 'green'." March 2008.
- <sup>xi</sup> Ibid.
- <sup>xii</sup> Condé Nast Traveler. "The Ethical Traveler Index". <<http://www.concierge.com/cntraveler/articles/10771?pageNumber=11>>.
- <sup>xiii</sup> Condé Nast Traveler. 2007. "How much do Condé Nast Traveler readers care about what hotels are doing to support local communities." <<http://www.concierge.com/cntraveler/articles/10771?pageNumber=1>>
- <sup>xiv</sup> Ibid.
- <sup>xv</sup> Ibid.
- <sup>xvi</sup> Ibid.
- <sup>xvii</sup> Hotel & Motel Management. "Consumers will Pay for Green to a Point." Nov 5, 2007. Peter C. Yesawich. <<http://www.hotelmotel.com/hotelmotel/Consumers-will-pay-for-green-to-a-point/ArticleStandard/Article/detail/470858>>
- <sup>xviii</sup> NMI Natural Marketing Institute. "2007 LOHAS Study". <<http://www.prlog.org/10006954-new-lohas-market-size-data-released-209-billion-opportunity.html>>
- <sup>xix</sup> Ibid.
- <sup>xx</sup> Ibid.
- <sup>xxi</sup> Travel Industry Association of America (TIA) and National Geographic Traveler (NGT), "The Geotourism Study: Phase 1 Executive Summary". 2002.
- <sup>xxii</sup> Ibid.
- <sup>xxiii</sup> Ibid.
- <sup>xxiv</sup> Travel Industry Association of America (TIA) and National Geographic Traveler (NGT), "The Geotourism Study: Phase 1 Executive Summary". 2002. <<http://www.prlog.org/10006954-new-lohas-market-size-data-released-209-billion-opportunity.html>>
- <sup>xxv</sup> New York Times. "Enjoy Your Green Stay ". Martha C. White. June 26, 2007. <<http://travel.nytimes.com/2007/06/26/business/26green.html?scp=1&sq=Enjoy%20Your%20Green%20Stay&st=cse>>
- <sup>xxvi</sup> Ibid.
- <sup>xxvii</sup> AccountingWEB. "Business Travelers are Starting to Demand Green Lodging". June 5, 2008. <<http://www.accountingweb.com/cgi-bin/item.cgi?id=105293&d=883&h=884&f=882&dateformat=%25o%20%25B%20%25Y>>
- <sup>xxviii</sup> Ibid.
- <sup>xxix</sup> Ibid.
- <sup>xxx</sup> Travel Weekly. "The Environment". November 16, 2007.
- <sup>xxxi</sup> CMI Green. The CMI Traveler Study 2009 v1. 2009.