

EXECUTIVE SUMMARY

Geotourism: The New Trend in Travel is the first examination of its kind of American travelers – a tremendous undertaking in ferreting out traveler attitudes that lead to potential sustainable tourism behavior. This unique study gives the travel industry insight into future consumer expectations of travel suppliers.

Traveler Attitudes Toward Tourism and the Environment

A majority of American travelers feel that travel is the natural right of all people and more than one third believe that travel promotes world peace and understanding. The vast majority of American travelers enjoy traveling within the United States, with 89 percent saying there are many destinations in this country that appeal to them. Less than ten percent say they prefer to travel internationally over traveling in the U.S.

Nearly three quarters of all travelers claim that it is important to them that their visit not damage the environment. This is not surprising, since most travelers (73%) place a high importance on a clean, unpolluted environment when they take a leisure trip. Most American travelers (80%) highly value outstanding scenery as well. Authenticity is also important to travelers. Many (61%) believe their experience is better when their destination preserves its natural, historic, and cultural sites.

The majority of travelers are ready to act to preserve and protect our natural sites. Nearly 91 million travelers (59%) support controlling access to and/or more careful regulation of National Parks and public lands in order to help preserve and protect the environment. Sizeable shares of U.S. travelers are interested in helping to preserve and protect the environment if such efforts can conveniently fit it into their daily lives (40%) and/or say they would do more for the environment if they knew specific actions to take (37%). In addition, 27.7 million travelers (18%) would pay a premium to visit sites that control the number of people entering.

The majority of American travelers show some concern for and sensitivity about the environment in general. Most travelers believe that people must live in harmony with nature in order to survive (71%). While a good portion of travelers carry this attitude with them when they travel, it also reflected while at home. For example, the majority of travelers say that they make an effort to be sensitive to environmental concerns by recycling, trying to conserve electricity and water at home. Just under half of all travelers report that they buy more energy efficient appliances even if they cost more and 30 percent buy environmentally safe household products.

When the travel dollars of these environmentally-oriented consumers are aggregated on a per capita basis, this group of American travelers can have a huge, positive impact on travel industry revenues. About 43 million American travelers (28%) say they generally buy products and services from specific companies that make an effort to preserve and protect the environment. Yet when it comes to *travel* companies, the standard is a bit higher. Even more travelers (54 million) are inclined to select travel companies that strive to protect and preserve the local environment of the destination. For a smaller group of travelers (11%), the environment is top of mind when actually making decisions about which travel companies to patronize.

Traveler Attitudes Toward Tourism and Cultural Heritage

More than half of the traveling American public consider it important to experience or learn about cultures other than their own when they travel. Over 95 million (62%) believe it is important to learn about other cultures when they travel. Half of all travelers (50%) express a similar sentiment that it is important to learn about people with ethnic heritages different from their own. For example, 89 million (58%) view travel as an opportunity to try local foods or cuisine, and 54 percent say that it gives them the chance to explore off the beaten path hotels and places frequented by locals.

Authenticity is a primary theme when examining travelers wants and needs. Four in ten (41%) travelers say their experience is better when they can see and do something authentic. In addition, half of all travelers prefer to experience the local culture (49%) and support local businesses (49%) at their destinations.

Travelers' positive attitudes about culture and history extend to the activities they choose to do at home and while traveling. Furthermore, one-half (50%) of all travelers say they eat in ethnic/specialty restaurants in their local area, and nearly as many attend community festivals and ethnic celebrations (45%). Many (44%) like to read books/magazines or watch movies/videos about history and culture. Four in ten travelers (40%) say they visit historic sites and museums in their local areas. Over one quarter of all travelers attend performing arts events (28%) and/or visit art museums/galleries (26%) in their local areas.

Nearly half of all travelers support controlling access to historic sites so that they may be preserved and protected. Significantly large numbers of American travelers are interested in history and culture, as reflected in their beliefs and local area activities. For example, the majority of American travelers believe that it is important that future generations know and pass on our nation's history (85%). Many travelers (54%) support additional funding for the preservation of historic sites and monuments, while 38 percent support additional funding for the cultural/visual performing arts. Also, 48 percent of travelers support controlling access to historic sites so that these sites could be preserved and protected.

Millions of American travelers will buy from companies and organizations that are culturally and socially oriented. Nearly one third (30%), or 46 million travelers, buy from specific companies because they know that these businesses donate part of their proceeds to charities. Twenty-two percent say they make monetary donations to historic/cultural/education organizations and 16 percent volunteer to work for such organizations at home. When it comes to tourism, one in three (34%) travelers support travel companies that strive to protect and preserve the history and culture of destinations. For about one third of travelers (31%, or 47.7 million) say it is important that the travel companies they use employ local people and support local communities.

Awareness and Influence of Travel Companies' Geotourism Efforts

One in every three travelers say they are influenced by the actions travel companies take to protect the environment and/or sustain local culture. When cost or price is not a consideration, it is not surprising that most American travelers think quality of service and convenience have the strongest influence on which travel companies they choose to use. Still, one third of all travelers are influenced by a travel company's actions to preserve the environment and/or history and culture of destinations. This indicates that travel companies' geotourism efforts do get noticed by a good portion of travelers.

Many travelers are willing to pay more for travel products and services from companies that strive to protect the environment. Although most travelers are concerned with price and value, 58.5 million (38%) say they would pay more to use a travel company that strives to protect and preserve the environment. Most important, the majority (61%) of those who would pay more to use such companies would in fact pay five to ten percent more.

Still, travel companies may be able to do more to make their customers aware of their efforts to protect and preserve the environment. Only about half of all travelers are aware of at least one practice employed by travel companies to preserve and protect the environment of destinations. Travelers are most often aware of companies that ask customers to reuse towels/sheets (36%) and those that use energy saving practices (30%). About one in five travelers (21%) are aware of travel companies that recycle and/or that use local vegetation on property grounds. Overall, few travelers are aware of any travel companies that publicly display their environmental practices or that educates customers on how to protect the local environment during their stay.

Millions of travelers are willing to pay between 5 and 10 percent more to support companies that protect and preserve culture and history. Nearly four in ten travelers (39%) say they would choose a travel company that preserves and protects the history and culture of destinations, even if it costs more. This equates to 58 million travelers who would pay more to use companies that preserve the history and culture of destinations—about the same number of travelers who would pay more for companies that preserve and protect the environment of destinations. Among those who would pay more, a majority (67%) would pay at least five percent more to use companies that preserve and protect the history and culture of destinations.

Over half of all travelers (56%) say they are aware of travel companies that strive to protect and preserve the history and culture of destinations. Practices such as using décor that reflects the local culture and offering local cuisine seem to be the most visible, as four in ten travelers are aware of companies that do each. About one third of travelers are aware of travel firms that offer a way to purchase tickets to local performances or special events (35%) and/or offer guided heritage/cultural tours (31%). For many of these travelers, awareness of a firm's historic/cultural preservation efforts translates into usage.

The Geotourists—who they are and how they travel

There are at least 55.1 million Americans who can be classified as “sustainable tourists” or “Geotourists”. The travel habits of three Geotourist segments—Geo-savvys, Urban Sophisticates, and Good Citizens—are guided by a high awareness of the world around them. These travelers have ceaseless expectations for unique and culturally authentic travel experiences that protect and preserve the ecological and cultural environment. These groups are demographically different, but all have strong geotourism inclinations.

Geo-savvys are young, well-educated, and environmentally aware travelers. One in four Geo-savvys is under age 35, giving this market segment an adventurous flair. Half of Geo-savvys live in large cities, and one in four lives in the Pacific region. Many Geo-savvys are affluent, although most young Geo-savvys have not yet reached the peak earning years. When it comes to travel, Geo-savvys show a distinct preference for destinations with authentic historic sites, different cultures, and educational experiences. Of all the geotourism segments, Geo-savvys are most likely to be aware of travel companies’ practices to preserve the environment of destinations. Along with Urban Sophisticates, Geo-savvys have the highest proportion of travelers (50%) who would use a travel company that preserves and protects the environment, even if they had to pay more.

Urban Sophisticates are the most affluent travelers with strong preferences for the cultural and social aspects of travel. This segment’s affluence is reflected in its demographic profile. These travelers are highly educated and are the most likely to hold executive, managerial, or professional occupations. Over half (56%) of Urban Sophisticates live in large urban areas and one in five lives in second-tier cities. Not surprisingly, Urban Sophisticates’ affluence and cultural affinity have a strong effect on their travel preferences. The majority of Urban Sophisticates (67%) prefer high quality accommodations with excellent facilities and fine dining. They also tend to seek destinations that offer authentic historic sites (73%) and cultural/arts events or attractions (74%). Most Urban Sophisticates prefer trips where they can explore historic and charming towns and locations (86%). Extensive travel experience makes these travelers highly aware of what travel companies do to preserve the history and culture of destinations. Of all the segments, Urban Sophisticates are the most willing to pay more to use a travel company that preserves the history and culture of destinations.

Good Citizens, while older and less sophisticated, are socially-conscious travelers. Good Citizens’ demographic profile reflects an older, but wiser set with an element of affluence. Along with Urban Sophisticates and Geo Savvys, Good Citizens are well educated. Four in ten Good Citizens (41%) have annual household incomes above \$75,000. What distinguishes Good Citizens is a heightened level of cultural and environmental awareness in their everyday lives. Good Citizens are more likely than any other group to make donations to historic, cultural and educational organizations. Similarly, this group is also most likely to buy from companies that donate to charities (52%) and from companies that make an effort to preserve and protect the environment (47%). When it comes to travel, Good Citizens are likely to carry this affinity with them. Many Good Citizens (70%) support controlling access to National Parks and other public lands in order to better preserve them. A majority believe that there should be more careful regulation of National Parks and public lands (67%). Many Good Citizens are willing to choose a travel firm that protects and preserves the environment and cultural heritage of destinations, even if it costs more. Yet compared to Geo-savvys and Urban Sophisticates, Good Citizens would not pay as much of a premium to use such travel companies.