The Broads

Market opportunities from the environment

The Tourism Company
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INTRODUCTION

The Broads is a protected area with a status equivalent to a National Park. It is the UK's premier wetland. Almost one quarter of its area is made up of Sites of Special Scientific Interest, some of which are National Nature Reserves. Most of these sites are internationally recognised for their biodiversity. Conservation of this environment and maintenance of amenity are important issues for the Broads, as are the many factors affecting the environment including local impacts and global factors such as climate change.

Tourism is a traditional activity in the Broads of great significance for the local economy. Markets for certain kinds of activity, notably hire boating, have been declining.

Internationally and within the UK, tourism operators are being urged to pay attention to the impact of their activities on the environment. Likewise it is recognised that the quality of the environment is an important issue for the success of tourism. This relationship between tourism and the environment is a particularly important one for protected areas such as the Broads.

Tourism operators may wish to consider how they relate to the environment out of their own concern for conservation. There are also economic factors that may affect their decisions in this area, including the cost of introducing environmental management measures and the savings that may be made from them. One factor of particular interest is the response of tourists to environmental issues – basically, **are there market advantages for tourism operators in the Broads from relating what they offer and the way they operate more closely to the quality of the environment?**

This is the question that this study seeks to answer. In doing so, it presents information from about the ways in which tourists relate to environmental issues and about how different kinds of tourists react in different ways. Conclusions are drawn about how relevant this is to the? Broads tourism operators and recommendations are made about how this should influence the marketing of the destination and individual enterprises.

Undertaking this study

The Tourism Company was asked to undertake this study by The Broads Authority in conjunction with The Broads Tourism Forum. The work was carried out in parallel with work by The Tourism Company in preparing the Strategy and Action Plan for Sustainable Tourism and Recreation for The Broads.

This study is based on secondary research – collecting together evidence obtained by others. Three main sources of information were used:

- Knowledge already available to The Tourism Company on sustainable and nature-based tourism markets.
- A thorough internet search, identifying and accessing relevant material and research publications available on the world wide web.

- A detailed interrogation of data collected from a survey of visitors to the Broads, carried out by The Tourism Company in the summer of 2005.

Environmental influences on tourism markets

At the outset it is important to understand the different ways in which tourists may react to the environment and environmental issues. There has been dangerous confusion over this, not helped by loose use of terminology that means different things to different people.

We suggest that the tourists' holiday choices and behaviour may be influenced by:
A) The quality and nature of the environment in the destination; and/or
B) Their concern for their own impact, and those of others, on the local and global environment.

These two influences are not mutually exclusive. Many tourists may be influenced by both.

This study is interested in both kinds of influence and seeks to determine the extent of each and the kinds of people affected.

Tourists influenced by the quality and nature of the destination's environment (Type A) may be more general tourists, affected by issues such as quality of scenery, or they may be tourists with a specialist interest in certain aspects of the environment such as birdwatching.

The term 'ecotourism' has caused some confusion. Some people use this to refer to tourism motivated by nature. Others use it to mean tourism that is environmentally responsible in terms of its impact. In fact the strict definition[1] requires both aspects to be in place. We have decided not to use this term in this study.

The structure of this report

This report is divided into six sections.
- Section 1 looks at the overall consumer response to environmental issues, and is not specifically related to tourism.
- Section 2 considers the influence of the quality and nature of the environment on tourist markets (Type A)
- Section 3 considers the extent to which the market is affected by concern for environmental impact (Type B)
- Section 4 looks briefly at some evidence on how overseas visitors are influenced by the environment (The previous two sections only use information on domestic tourists)
- Section 5 looks at evidence relating specifically to the Broads, from the visitor survey we undertook there.
- Section 6 draws some conclusions and presents some recommendations.

[1] The International Ecotourism Society defines ecotourism as: 'Responsible travel to natural areas that conserves the environment and sustains the wellbeing of local people'

1 PUBLIC RESPONSE TO THE ENVIRONMENT

Before turning specifically to tourism, this chapter provides an initial indication of the potential size of the domestic market that may be influenced by the environment, by looking at evidence from surveys of the population as a whole about their general awareness and response to environmental issues.

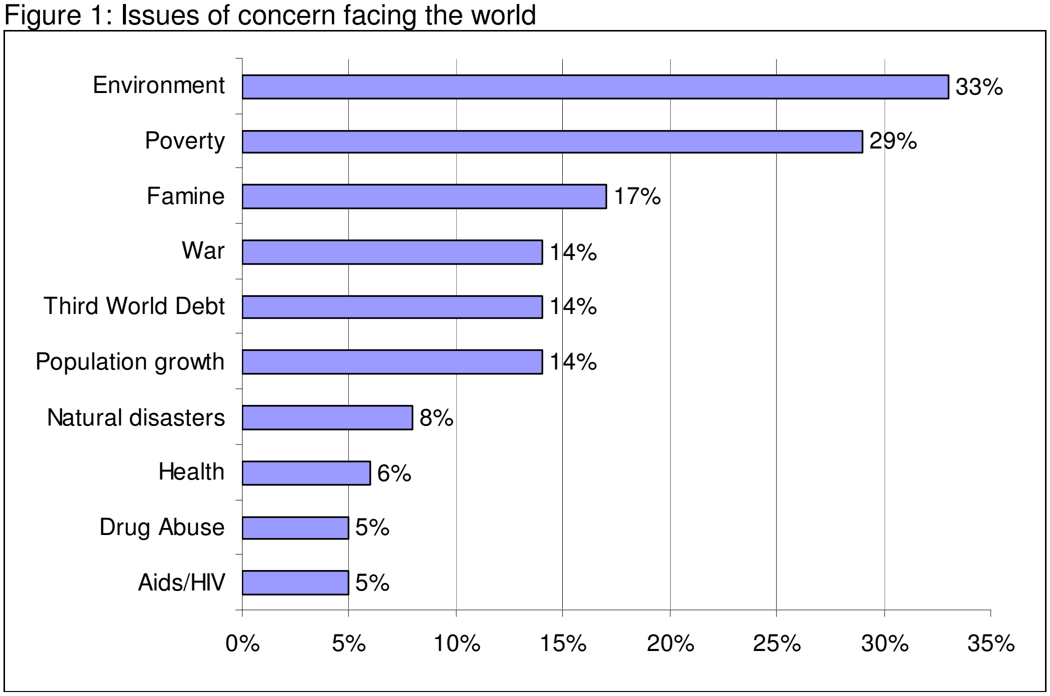
1.1 Perceived importance of environmental issues

The first set of evidence concerns the degree of priority placed by people on environmental issues. The following main points emerge.

- **Thinking globally, the environment tops the list of concerns**

A survey by MORI in 2004[2] looked at public opinion about a range of issues facing the world, asking people to indicate what they felt were the most important problems. The results are shown in Figure 1. The environment was the single issue receiving the most mentions.

Figure 1: Issues of concern facing the world



The Day After Tomorrow: Public Opinion on Climate Change, May 2004. The graph shows the issues with the highest number of mentions.

[2] The Day After Tomorrow: Public Opinion on Climate Change, May 2004

- **The environment is seen as less important as a concern for the UK**

The same survey asked people what they felt were the most important issues facing this country. Here the environment was further down the list, coming well behind the National Heath Service, schools/education, defence and foreign affairs.

This result is confirmed by a further survey by MORI[3] which asked people to think about the quality of life in Britain today, and in particular in their own area. Crime prevention topped the list (63% voted this in the top two or three issues requiring most attention), followed by health services (56%). General concern for the environment was only mentioned by 20% of respondents. However, interestingly, a specific environmental issue which directly affects people, litter and disposing of waste, was voted third (33% mentioned it).

- **When taking decisions, the environment is a secondary concern for many but a primary concern for just a few**

We looked at a range of evidence about the information that people seek out concerning how they live their lives and the decisions they take.

This was the subject of a study by the National Consumer Council[4]. This found that information on sustainable consumption was less sought out than the two other forms of information included in the survey (see Table 1 below).

Table 1: Percentage of people actively seeking information on issues

Issue	% actively seeking information on the issue
Living more healthily	75%
Pensions and savings	63%
Sustainable consumption*	19% (8.6 million people)

Source: Desperately Seeking Sustainability? National Consumer Council, August 2005 (*Note: In the survey, the term sustainable consumption was avoided. Instead respondents were asked about a range of issues related to energy, food, waste, transport)

Further evidence is available from information sought about specific products. A survey by the Co-Op[5] looked at the range of concerns amongst customers when purchasing food, based on 30,000 responses. Here, environment and sustainability was voted the top priority by only 9%, compared with truthful food labelling (24%), animal welfare (21%) and food integrity (16%), However, it was considered an important secondary concern – 43% indicated the environment in their top three concerns.

[3] The 2004 Periodic Review: research into Customers' Views, MORI for DEFRA et al, 2004
[4] Desperately Seeking Sustainability? National Consumer Council, August 2005
[5] Shopping with attitude, the Co-operative group. May 2004

The overall picture is summed up by UNEP based on research among consumers[6], which concluded that:

- Concern for sustainability issues is high, but the strength and depth of attitudes are low.
- Although levels of concern are high, sustainability issues are not necessarily the highest priority for the general public which means that potential activities may be subordinated to other concerns.
- Sustainability issues are usually secondary to the main evaluation criteria for purchasing decisions. 'Corporate Social Responsibility' ranks low relative to other brand attributes which means that few people actively seek out appropriate companies and products.

■ Environmental concerns are becoming more important

It is widely believed that people are becoming more concerned about environmental issues.

A number of studies bear this out. The survey on food, for the Co-Op, mentioned above, tracked changes between 1994 and 2004. The results are shown in Table 2.

Table 2: Change in attitude to environmental issues

	1994	**2004**	**Change**
Wildlife welfare – Very important to support products not harmful to wildlife	59%	70%	UP 18%
Conserve natural resources – Very important to stop products from non-sustainable sources	55%	64%	UP 16%
Pollution of environment – Very important that businesses minimise pollution	52%	67%	UP 29%

Source: Shopping with Attitude, The Co-operative Group, May 2004. The figures show those agreeing with the statement, or describing the issue as important or very important.

1.2 Consumer purchases made

Merely holding attitudes or views that are supportive of the environment does not necessarily mean that these views will be translated into actual purchasing activity.

Some evidence is available about actual purchases made and how these relate to environmentally responsible products. One of the most useful studies into ethical and green consumerism is the Co-operative Bank's Ethical Purchasing Index. Started in 1999, the Index allows trends in ethical purchasing to be tracked using a basket of what are described as ethical goods. Goods included in the index include food (including organic eggs and fair-trade coffee and tea), fuel and light, housing (green mortgage payments), household goods, personal items, transport, charity, ethical investments and banking. The results are shown in Table 3.

[6] The Role of Marketing at the Business/Consumer Interface. A paper for United Nations Environment Programme (UNEP) presented at a workshop to discuss the marketing implications of sustainable consumption, MPG International, April 2005

Table 3: Sales Volume of the Ethical Market

	1999	2000	2001	2002	2003
Spend	9.8bn	12bn	13.9	19.9bn	24.7bn
Market Share%	1.34	1.54	1.68	Less than 2%	Not available

Source: Ethical Purchasing Index / Ethical Consumerism Index, 1999-2004

- **Market share is low but is growing and varies between sectors and items**

The table shows that between 1999 and 2003, ethical purchasing covered by the index has increased from 9.8bn to 24.7bn, an increase of 152%. Ethical purchases still account for less than 2 percent of all purchases, but the overall market share of ethical consumerism has increased by almost 40 percent in five years.

The Index shows that there is some variation between the different consumer sectors in terms of the market share of 'ethical' goods. In 2001 (when the sectors were examined) such goods accounted for a 7.1 % share of all household goods purchased and a 3.9% share of personal items.

Looking at specific items, free-range eggs command 40% market share whilst sales of energy efficient household appliances now have, for the first time, topped 50% market share. The report points to the fact that these markets have benefited from supplier, retailer and/or government intervention.

In considering these results, it is apparent that there may be a whole range of factors that influence a decision to purchase a product that happens to be environmentally friendly, other than a specific desire to benefit the environment. For example, organic food and free range eggs may be favoured for their taste and flavour.

1.3 Willingness to pay a premium

There is a small but growing amount of research available about people's willingness to pay a premium for products and services with environmental benefits. The main conclusions that can be drawn from this are as follows.

- **A majority of consumers would be willing to pay more to support the environment**

A number of surveys have found relatively high percentages of people saying that they would be willing to pay more for products that are environmentally friendly.

- 84% of participants in a survey undertaken by the Co-op[7] stated that they would pay a premium for environmentally friendly food products.
- A survey of organic food purchasing behaviour by the Soil Association[8] found that two-thirds or more of organic consumers are prepared to pay more for organic eggs, fruit and vegetables, beef and pork/chicken.

[7] Ethics in Retailing Research, Co-op Customer Survey, 2003, quoted in Environmental Marketing: A collaborative Approach, English Nature
[8] Source: Organic Food – Understanding the Consumer and Increasing Sales, Soil Association, 2003

- The research of major supermarket retailers by English Nature[9] found that most retailers agreed that a small premium can be achieved for products that are marketed as beneficial to the environment.

However, it is important not to get carried away by these findings. The last mentioned report states that it would be far more realistic to use the environmental attribute as a means of differentiating products and securing a market rather than increasing price.

- **Consumers are generally not wiling to pay more than a 10% premium and this may affect sales**

Studies have also considered how much more consumers might be willing to pay. A general conclusion is that this would not be more than 10%.

- The Soil Association study on organic food found that between 68% and 74% per cent (according to category) are prepared to pay up to 10% more (with between 22% and 26% are prepared to pay 10-25% more).
- The English Nature study found that the vast majority of mainstream consumers are unwilling to support a price premium of more than 10%.

There are some exceptions. A study by the RSPB[10] found that consumers were willing to pay between 15-20% for food products that are beneficial for the environment, but products must also deliver on quality. Price sensitivity was found to be higher among already high value products

One should be wary of these results in terms of what actually happens in reality. A number of studies have identified a gap between willingness to pay and actually doing so: "In spite of consumers claiming that they would pay, there is a gap between awareness and action which means that these sentiments are not reflected in sales.[11]"

It is also important to consider whether a price premium might also affect actual volume of sales. We've seen already from some of the figures above that willingness to pay probably declines significantly beyond 10% premiums. Further light is shed on the effect of this by English Nature who provide some simple forecasts of price elasticity in this regard. They base their figures on a study involving a sample of 35,000 people across the globe[12]. They estimate that increasing the price by 10% to reflect the positive environmental attributes of a product could make 27% of the demand fall off.

1.4 Participation in environmental organisations

Further evidence about the overall response of the UK population to the environment can be found from the membership of environmental bodies. Some membership figures are given in Table 4.

[9] Environmental Marketing: A Collaborative Approach,
[10] Exploring the appeal and Marketing of Wildlife Friendly Food, Cambridge Marketing Research Ltd for RSPB, 2001, quoted in Environmental Marketing: A Collaborative Approach, English Nature, date unknown
[11] Sustainable Motivation: Attitudinal and Behavioural Drivers for Action, UNEP and ESOMAR, Date unknown
[12] Environics International Ltd, 2000.

Table 4: Membership of UK environmental bodies Thousands

	1981	1991	1997	1999	2002	2004
National Trust	1,046	2,152	2,489	2,643	3,000	3,400
RSPB	441	852	1,007	1,004	1,022	1,050
Wildlife Trusts	142	233	310	325	413	650
WWF	60	227	241	255	320	
Friends of the Earth	18	111	114	112	119	
Greenpeace	30	312	215	176	221	

- **Memberships have generally grown, but not universally**

These figures show that three of the organisations, The National Trust, Wildlife Trusts and WWF, have grown significantly in recent years, while the others also saw rapid growth in the early nineties but this has tailed off.

It is difficult to draw conclusions here as membership may reflect a mixture of interest, deeper concern or simply a desire to benefit from the opportunities that such membership can convey, for example for countryside access. There may be a pattern that deeper green campaigning organisations have not maintained the growth of organisations also offering lifestyle opportunities to members.

Research into the profile of members of environmental organisations[13] has shown that, compared to non-members, they are more likely to be affluent, have higher educational attainment and be employed in professional and managerial occupations.

[13] Study by the University of Aberdeen, funded by ESRC

2 TOURISTS SEEKING QUALITY ENVIRONMENTS

We now turn to UK tourists and look at those markets that are influenced by the environment in their holiday choice and activities. This chapter focuses on people who are influenced by the quality and nature of the environment in their motivations and what they do (Type A influences as described in the introduction). It does not cover the influence of seeking to be environmentally responsible, which is looked at in the next chapter.

2.1 Fine scenery and landscapes as an attraction

At the outset, we looked for evidence on how important the overall quality of the environment, in terms of scenery and landscapes, was to tourists. The following conclusions were drawn.

■ Scenery is a primary motivator of holidays

Most surveys of visitors at a national or local level in the UK confirm the importance of attractive scenery as a critical factor in the choice of holiday destinations.

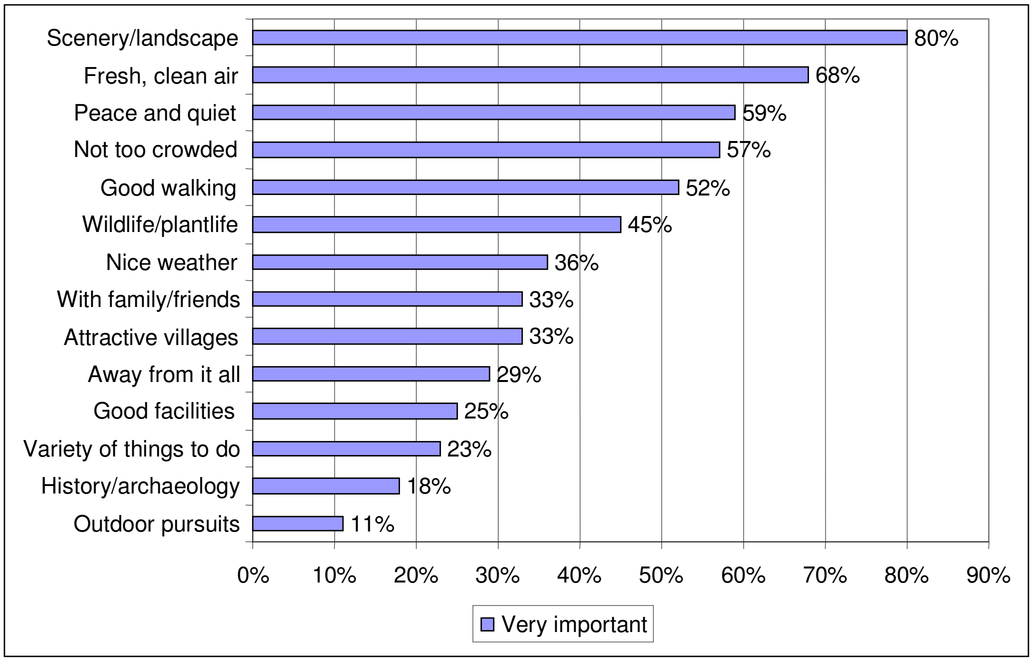
- A survey by VisitBritain in 2004[14] asked people about the different factors affecting their decision to visit a particular destination for a holiday or short break. 20 factors were ranked, the second and third place were respectively 'beaches and coastline' and 'unspoilt countryside'. The sixth ranked factor was 'the chance to see wildlife in natural habitats'.
- Research by the Forestry Commission looked at the reasons given for visiting six rural areas in the UK[15]. In all six cases, good scenery scored highest, followed by peace and tranquillity and then visitor attractions and food and drink.

■ Scenery/landscape is critical to enjoyment of National Parks

The importance of landscape is even more marked when considering the reasons that people give for visiting National Parks. Scenery and landscape stands out as the most important feature distinguishing National Parks from other areas and for motivating visitors[16]. The same applies to the factors that contribute towards enjoyment of visits to National Park. Figure 2 shows the large part that landscape and an unspoilt natural environment plays in this. It gives the percentage of respondents believing different factors to be very important.

[14] Destination England, How well does it deliver. VisitBriatain, 2004
[15] Forests' Role in Tourism: Phase 2 - MAIN REPORT- FINAL for the Forestry Group (Economics & Statistics) of the Forestry Commission, August 2003
[16] Visitors to National Parls: A Summary of the 1994 Survey Findings, Countryside Commission, 1996

Figure 2: Factors contributing to enjoyment of National Parks



Visitors to National Parks, Countryside Commission, 1996

In addition to the overall attractiveness of the scenery and landscape, it is important to consider whether to what extent the UK visitor market is concerned about the extent to which environments are well managed and maintained. The evidence available suggests that:

- **Having a clean, unspoilt natural environment is very important to tourists**

A survey in 2002 by the English Tourism Council[17] asked for levels of agreement with a number of factors important in choosing a holiday destination. Top rank was given to 'Having a well managed environment, clean, safe and litter free', which was considered important by 63% of respondents.

2.2 The influence of nature and wildlife

We looked in more detail at the extent to which the holiday market is influenced by nature and wildlife, which are more particular and specific attributes of a destination than more general scenic and landscape quality. Our findings are as follows.

- **Nature and wildlife can influence a sizable, general market**

Nature and wildlife are sometimes considered to appeal simply to a small niche market. However, evidence suggests that they do have a much wider influence than this.

[17] Visitor Attitudes to Sustainable Tourism, English Tourism Council, April 2002

- The high ranking given to ‘Chance to see wildlife in natural habitats’ in the VisitBritain survey has already been mentioned.
- The United Kingdom Tourism Survey 2002 (the last to study activities) showed that 16% of all holiday trips in England included ‘field study/nature study/bird or wildlife watching’ as an activity undertaken on holiday. These tended to be longer holidays than average and accounted for 22% of all holiday nights.
- Research undertaken by The Tourism Company on attitudes to tourism in forests revealed that the chance of seeing wildlife was a major aspect of interest to visitors.
- A survey by Scottish Natural Heritage revealed that 25% of visitors to Scotland are very interested in birds/plants or other aspects of Scottish wildlife’ and that a further 22% are ‘quite interested in them and would like to find out more’.
- A study by RSPB[18] on six sites on the Norfolk coast found that birds and wildlife had influenced the decision to come of 59% of visitors and was the main reason for the visit for 34%. It was the most important factor influencing choice.

- **People with a special interest in wildlife form a small but identifiable market**

The UKTS 2002, mentioned above, estimated that around 1% of holiday trips and nights in England are accounted for by holidays where ‘field study/nature study/bird or wildlife watching’ is the main purpose of the holiday. This amounts to some 800,000 holiday trips.

MINTEL estimate that 6% of the population have taken a nature-based holiday at some point[19]. Helpfully, their survey provides a breakdown of the market profile of these holiday takers, which is given in Table 5. This shows that such breaks are of proportionately greater interest to younger people without children but also have some appeal to families and older people. They also appeal particularly to the C1 socio-economic group and those from London.

Table 5: Profile of people going on nature breaks

	% of nature break takers	**% total population**
AB	26%	24%
C1	39%	28%
C2	18%	21%
D	12%	17%
E	6%	10%
Under 45 no kids	43%	28%
Families	23%	28%
45 – 64 no kids under 16	19%	25%
Over 65	15%	20%
London	27%	20%
South	12%	10%
Anglia/Midlands	24%	23%
South West/Wales	13%	11%
Yorkshire/ N East	15%	15%
North West	6%	12%
Scotland	5%	9%

[18] Valuing Norfolk’s Coast, RSPB, 2000
[19] Special Interest Holidays, MINTEL, November 2002

3 ENVIRONMENTALLY RESPONSIBLE TOURISTS

In this chapter we look at the size and nature of the UK tourist market that takes into consideration concern for impacts on the environment, in terms of their own activities and the activities of the enterprises and operators they use. This is the Type B influence as identified in the introduction.

3.1 The relative influence of environmental responsibility on holiday choice

A number of surveys have been undertaken and considered conclusions drawn about the extent to which people take concerns about the environmental impact into account in their holiday choice and behaviour. The main points arising from this are as follows.

- **A very small percentage of people actively seek out environmentally friendly holidays as the main motivating factor in their holiday choice**

The size of the market of people who will chose to particular holiday or facility because it is environmentally friendly, above other factors, appears to be extremely small.

- Environmental responsibility did not feature in the 32 factors influencing holiday choice identified by VisitBritain in their 2004 survey[20]
- MINTEL's report on ethical holidays[21] estimates that travellers who 'actively seek out sustainable holidays' as being about one percent of the travel market. However they also say that this figure may – maybe to around 5% somewhere between 2010 and 2020.

- **Significant numbers of people claim to be concerned about the impact of their holidays on the environment, but results vary**

Despite these low figures for what may be described as a fully committed deep green market, there is evidence to suggest that a far larger number of people are concerned about the environmental impact of their holidays, or at least say that they are.

- A survey by the English Tourism Council (ETC)[22] found that 71% or people agreed strongly that it is important not to damage the environment whilst on holiday.
- A survey by ABTA on foreign holidays[23] found that 65% of respondents said that the reputation of the holiday company on environmental issues is either very or fairly important in affecting their choice of holiday company

[20] Destination England; How Well Does It Deliver, VisitBritain, November 2004
[21] Ethical holidays, MINTEL, October 2005
[22] Visitor Attitudes to Sustainable Tourism, English Tourism Council 2002
[23] MORI research for ABTA November 2002

- Looking at travel by British people going abroad, a MINTEL survey for First Choice[24] found that 26% of people were concerned about the impact that tourism can have on the environment of my destination. This survey found that concerned tourists are more likely to be in the middle age bracket (35 to 54).

- **An indication of environmental responsibility is not a primary reason why people may chose one type of facility over another, but is likely to be taken into account as a secondary factor**

Given the fact that some people are concerned about environmental impact, even though very few are deeply motivated by this, an important question is the extent to which they may or may not be influenced by it at all in their choice of holiday enterprise, and how this compares with other factors.

The ETC survey mentioned above asked people which of a list of features were important to them when booking accommodation. The results are shown in Table 6.

Table 6: Factors considered important when booking accommodation

Criterion	**% rating it of high importance**
Quality of the accommodation	83%
Price of the accommodation	74%
Proximity of the accommodation to local facilities / attractions	69%
The accommodation's commitment to being environmentally friendly	58%
The accommodation's commitment to employing local staff and paying them good wages	47%
The accommodation's commitment to purchasing local products	32%
None of the above	6%
Don't know	1%

Visitor Attitudes to Sustainable Tourism, English Tourism Council, April 2002

In a similar vein, Tearfund asked UK travellers going overseas how important a list of factors were in determining holiday choice. The results are in Table 7.

Table 7: Factors important in last overseas holiday booked

Criterion	**% rating it of high importance**
Affordable cost	82%
Good weather	78%
Guaranteed a good hotel	71%
Good information is available on the social, economic and political situation of the country and the local area to be visited	42%
Significant opportunity for interaction with the local people	37%
Trip has been specifically designed to cause as little damage as possible to the environment	32%
Company has ethical policies	27%
Used the company before	26%

Tearfund – Tourism, An Ethical Issue, 2000

[24] First Choice – Responsible tourism, who cares?, 2005

The evidence suggests that it is not a primary factor but is certainly one that may be taken into consideration as a secondary factor if other things are equal. Quality, price and location are clearly far more important issues to people, but environmental considerations are on the list, affecting around 30% to 50% of people depending on the survey.

It must be borne in mind, however, that these surveys were specifically seeking to test this issue and there is a tendency for respondents to such surveys to give the answers that they feel they would like to be seen to be giving. Actual practice may not match stated good intentions.

3.2 Willingness to pay

As with general consumer research, surveys have also investigated whether tourists may be prepared to pay an environmental premium.

- **High percentages of people say that they would pay a little more to support the environment or for environmentally friendly holiday products**

A survey of British travellers carried out by MORI in 2002[25] found that eight in ten British travellers would be willing to pay to offset the environmental impact for their flights, car rental and accommodation if it was their choice to do so.

In a similar vein to payments for offsetting, there is some evidence of a high level of stated interest in paying extra to sustainable tourism businesses. The ETC survey[26] found that 68% of consumers said that they choose an attraction or accommodation provider that was part of a green accreditation scheme over one that was not, even if the price of the green, environmentally accredited business was slightly higher

If we look at how much people state that they are willing to pay, Table 8 shows that, as was the case in general consumer research, few are willing to pay more than 10% as a premium.

Table 8: How much extra would you be willing to pay to stay with an accommodation provider that was committed to good environmental practice?

Nothing, I would not be prepared to pay a higher price	28%
1% higher price (£2 extra on a bill of £200)	9%
3% higher price (£6 extra on a bill of £200)	10%
5% higher price (£10 extra on a bill of £200)	22%
10% higher price (£20 extra on a bill of £200)	19%
More than a 10% higher price	5%
Other	2%
Don't know	2%

Visitor Attitudes to Sustainable Tourism, ETC, 2002

The percentage of people saying they would be prepared to pay more is quite high. Again, reality may not match these intentions.

[25] Results from MORI survey carried out for FutureForests and published Aug 2002, quoted on www.mori.com.pools/2002/futureforest.shtml
[26] Visitor Attitudes to Sustainable Tourism, ETC, 2002

- **People are willing to make voluntary donations to support the environment of destinations visitors**

Another aspect of paying for the environment is the possibility of voluntary giving by tourists. A number of destinations in the UK have run so called 'Visitor Payback' schemes. Surveys asking about this aspect of willing ness to pay have had positive responses. The ETC report quoted above found that 65% agreed that they would be willing to make a donation to help pay for the upkeep of the local environment.

Here there is direct evidence that people have actually carried this through in practice. Where Visitor Payback has been implemented on the bases of an opt-out scheme, with enterprises adding a small percent to bills that people can opt not to pay, very few people have declined to make the payment. Straight donation schemes, where people have to take the initiative to make a payment, have been less successful in attracting response. This illustrates an important issue – often it is the way in which people are approached and the amount of effort that they themselves have to make that will determine the actual response.

4 ENVIRONMENTAL INFLUENCE ON OVERSEAS TOURIST MARKETS

The last two chapters have look at the response of British tourists. We have also obtained a small amount of evidence of the response to the environment within overseas markets. We have concentrated on Germany and the Netherlands as it is believed that consumers in these countries tend to be more environmentally conscious than in many other countries. They are also important markets for the Broads.

4.1 German market response

It is commonly held belief that Germans are particularly 'green' consumers. This is borne out in a number of aspects of their overall consumer behaviour and is perhaps reflected in the relatively high profile of Green politics in Germany. Looking at the evidence of the influence of the environment on holiday taking, however, we conclude that:

- **Germans are particularly concerned about environmental management of the destination as a whole**

This is borne out by a question about the environment that was added to the annual German holiday taking survey, the Reiseanalyse, in 2002. The question asked: When thinking about your next holiday, which of the following are important to you? The results are given in Table 9.

Table 9 Aspects of importance to Germans in planning holidays

Clean beaches and water	64.5%
No rubbish in resort or surrounding area	59.1%
No noise pollution from traffic or discos	51.0%
No urbanisation of rural areas	50.0%
Good nature protection in the holiday destination	45.8%
Environmentally friendly accommodation	41.8%
Little traffic and good public transport in the destination	35.1%
Possibility of reaching the destination easily by bus or train	29.0%
Indication of environmentally preferable products in operators catalogues	18.7%
Easy identity of environmentally friendly products (Ecolabels)	14.2%

Reiseanalyse, 2002

The results underline the importance of to Germans of keeping the environment clean. Beyond this, the importance of environmentally friendly accommodation is significant (42%), but this is in fact similar to the result for England from the ETC survey. In the case of Germans however, anecdotal evidence suggests that they may be more serious about this aspect of their holiday choice and more likely to expect this as a norm rather than an exception.

Although Germans do take the environment seriously, it appears that even in Germany the deep green market that would be primarily motivated by an environmentally friendly holiday and specifically chose products primarily because of this aspect is still small.

4.2 Dutch market response

Like the Germans, the Dutch take the environment seriously.

VisitBritain, in its profile of the Dutch market, says that: "Generally 'green' travel products, whether walking, cycling, camping, visits to gardens or simply escaping a crowded urban life, are increasingly in demand".

■ Dutch tourists take the environment into account and seek better relevant information

An omnibus survey of travellers in Holland in 2004[27] identified that:

- 81% believe that tourism should not damage the environment
- 60% say that they personally consider environmental factors in their choice of holiday
- 60% say that if two options are similar in many ways but one is more environmentally friendly they will chose the latter
- 33% stay that they are very conscious of environmental impact in choosing the activities they undertake
- 30% say that they are very conscious of the environmental impact in choosing accommodation
- Many say that they would take the environment more into account than they do at the moment but do not have the right information.

Dutch tourists are avid collectors of information. Amongst this, information on environmentally friendly products is important to them. A study of Dutch tourists in 1996[28] found that 86% thought it would be a good idea to provide information on the environmental performance of accommodation. A large majority (73%) stated that they would use this information when selecting accommodation.

[27] ANWB Omnibus Survey, 2004
[28] De betekenis van nature, 1996

5 ENVIRONMENTAL INFLUENCE ON VISITORS TO THE BROADS

The final set of data relates to the Broads itself and the reaction of visitors who go there. The evidence comes mainly from the Broads Visitor Survey conducted by The Tourism Company in August and September of 2005 at locations throughout the Boards, with a base of 900 completed responses. Some information is also used from a survey of boat hirers conducted for the Broads Boat Hire Industry Steering Group in 2000. The main findings of relevance are as follows.

- **The scenery of the Broads is one of the main attractors**

In the survey in 2000 boat hirers were asked what was the main reason for choosing the Broads as a location. Scenery was the second most frequent reason selected, by 23% of respondents, but was superseded by 'plenty to see and do' (40%).

- **Significant proportions of Broads visitors are members of conservation organisations**

The Visitor Survey found that 28% of visitors were members of either the National Trust, RSPB, English Heritage or a local Wildlife Trust. If other possible conservation bodies had been included on the list, the percentage may have been higher. Of these bodies listed, most people were National Trust members (18%) while 10% were members of the RSPB. Membership levels were higher amongst land-based visitors than water-based visitors.

Visitors who are members of conservation bodies are relatively more likely to engage in watching wildlife than non-members. They also show a greater tendency to explore, with a higher proportion going on long walks and also wanting to spend more time on the land if they are water based and on the water if they are land based. Members also have a slightly greater propensity to consider returning to the Broads outside the main summer season.

- **Watching wildlife is a major activity of Broads visitors**

Almost half of all visitors surveyed had either watched wildlife or were planning to do so on their visit. This was a particularly important activity for water-based visitors (55% of visitors participating) but was also an element of the experience of visitors staying on the land (41% participating) and of day visitors (38%).

As an activity it was ranked fourth in level of participation, after going for a walk (77%), visiting pubs/restaurants (77%) and shopping/local products (50%). It was a more important activity than visiting tourist attractions (35%).

Watching wildlife was of equal interest to first time and more experienced visitors. It was more frequently undertaken by longer staying visitors that those on short breaks. It was equally popular amongst those with children in the group and those without.

Watching wildlife was one of the most frequently mentioned reasons, unprompted, why people felt that they might consider returning out of season. It was particularly given as a reason for coming to the Broads in the spring.

- **The vast majority of Broads visitors feel that the area should be kept as natural as possible, with limited development**

94% of respondents agreed with this statement, with 56% saying they agreed strongly. There was a slightly greater tendency to strongly agree with this by water based visitors and day visitors than by those staying on the land, but in all cases the sentiment in favour of keeping the place natural was overwhelming.

- **Broads visitors are more likely to choose accommodation that is committed to being environmentally friendly**

The visitor survey asked this question directly. 21% of all respondents agreed strongly with it and a further 50% agreed. The former figure is perhaps most indicative of those who are really likely to respond to this is practice. There was relatively little difference between land and water-based visitors in the answers they gave to this. Understandably, members of conservation bodies were more likely to agree strongly (31%) than were non members.

- **There is a reasonable level of interest in donating a small amount to help the conservation of the Broads**

15% of respondents agreed strongly that they would be prepared to do this, with a further 58% agreeing. Again, the 'agree strongly' figure is perhaps the most significant. There is little difference between land and water-based visitors here, with day visitors being slightly the most likely to agree strongly, possibly because they are more local and frequent visitors and may have the greatest empathy with the Broads.

6 APPROACHES ELSEWHERE

We set out below just a few comments about what appears to be happening elsewhere in the UK in terms of capitalising on the public's environmental interests and concerns.

Many regions are taking sustainability in tourism much more seriously than before. For example, this is one of just three pillars of the regional tourism strategy for South West England. South West Tourism has a separate section dedicated to sustainability and especially to encouraging more enterprises and destinations to improve their environmental management practices. This is partly seen as important in its own right, but also viewed to some extent as an opportunity to relate well to the market. They see the market opportunity, however, being taken up more at a sub-regional level.

A clear example of the latter is the campaign led by Devon County Council called Discover Devon Naturally. This melds the promotion of their natural areas and sites (national parks, AONBs, nature reserves), outdoor access opportunities (walking, cycling, riding etc.) and an overall 'caring for the environment' message. They have conducted research that shows that many people are both interested in the environment and wildlife and would like to respond positively to enterprises that are clearly caring for the environment. The 'green' credentials of accommodation and facilities fit in with the 'nature' band and lend it strength and credibility. A programme of getting more enterprises to go green, through the Green Tourism Business Scheme, is being rolled out to back this up. However, it is the idea of enjoying nature rather than being 'good' *per se* that is the concept that is put across to attract more tourists.

Promotion of accreditation of good environmental practice, primarily through the Green Tourism Business Scheme, is being taken up in a number of areas of England now. In Scotland, where the scheme originated, VisitScotland has recently announced that by 2010 they will expect all business to be part of this to participate in any VisitScotland scheme. It appears that this is at least as much motivated by wishing to see better environmental management as seeking to gain a marketing advantage. However, it is interesting to see that in parallel with this VisitScotland have been actively promoting nature and wildlife as a major theme, branded as Wild-Scotland and set up as a separate cluster of products networked by the new Scottish Wildlife and Nature Tourism Operators Association.

Looking at the past history of tourism enterprises in England that have taken positive environmental management measures, some evidence is available from a survey undertaken by The Tourism Company of users of the Countryside Agency/ETC 'Green Audit Kit'. This showed that the kit had been well used, with many enterprises taking simple steps to save energy etc. The main motivation was the proprietor's own concern for the environment rather than commercial gain, though cost saving and a possible marketing advantage were also seen as important. In terms of the latter, though, enterprise had not seen many people coming to them because of their green activities. More tourists had been interested and impressed by what the enterprises had been doing through talking to them after arrival and there was a general feeling that this was very good for p.r. and leading to repeat business – part of the caring ethos. The enterprises felt that going too heavy on this as theme for capturing the market would be inappropriate, but they were keen to be more easily recognised for being environmentally caring, for example through acquiring a green label and having this clearly identified in print/websites.

There is little evidence that enterprises have put up their prices because they are environmentally friendly. The advantages sought have been more in terms of cost saving and p.r. Projects that have sought to extract higher spending from tourists to support the environment have been more orientated to extracting donations and add-on payments for conservation of the destination, as in the ‘visitor payback’ schemes mentioned in Chapter 4. The best example of this is in the Lake District where 180 tourism business are participating through the Lake District Tourism and Conservation partnership, which raises around £175,000 per year for conservation.

Many national parks and AONBs are become more active in pursuing sustainable tourism initiatives and promoting themselves as destinations for enjoying landscapes, nature and wildlife. They are also taking visitor management and environmental impacts of enterprises more seriously. These are all aspects that relate to the European Charter for which the Broads has applied. Looking at the existing UK Charter Parks: the Cairngorms has set targets for enterprises to take up the Green Tourism Business Scheme; the Forest of Bowland has been working with the RSPB and English Nature on the Birds of Bowland events and festival; and the Mountains of Mourne has been taking a lead in seeing how environmental accreditation can be rolled out across Northern Ireland.

In all these examples, promoting good environmental management practice by enterprises has been seen as a way of backing up and adding depth and credibility to wider creative marketing for the destination (in which the enterprises participate) based on scenery, nature and wildlife.

7 CONCLUSIONS AND RECOMMENDATIONS

This chapter draws a simple set of conclusions and recommendations from the evidence presented in this report.

7.1 Conclusions

1. The overall quality of the environment – beautiful scenery and clean, well maintained places to visit – are of absolutely fundamental importance to UK and many foreign tourists in their choice of destination and their enjoyment. It is particularly expected of national parks.

2. A substantial number of tourists are keen to see wildlife and this adds to their experience, even though they may not be specialists. The level of this interest has perhaps been underestimated in the past and it can be a theme to promote with widespread appeal.

3. There is a small market of people who respond to more specific nature/wildlife packages and breaks and this can be exploited.

4. The size of the market of people who chose a holiday or enterprises primarily on the basis of wanting to minimise their impact on the market is very limited. This is not a market that should be targeted per se. One should not set up an environmentally friendly business and then expect a 'green' market just to come to it.

5. On the other hand, significant numbers of UK (and German and Dutch and maybe other nationalities) tourists do declare that they take account of environmental impact and would be sensitive to choosing an identifiable environmentally friendly establishment over one that was not, provided other factors including location, quality and price are right[29]. They need good information to help them – it should be made easy for them.

6. People who select environmentally friendly products may not do so simply for reasons of saving the world. Partly this may be self-interest, in that such products may be more natural, quieter, tastier, etc. Much research in this area suggests that self-interest is more powerful than altruism.

7. Some people may be prepared to pay a little more for a facility that is environmentally friendly – maybe up to 10%. It is also apparent that people with an environmental interest and consciousness tend to be in higher socio-economic groups and may have more spending power.

8. The Broads is well placed to capitalise on the environment. Many of its visitors already have a strong wildlife interest and will respond positively to sound environmental management. This may encourage more to come again, maybe out of the main season.

[29] It is possible that survey techniques, using pre-prompted questions, may have over-inflated the response, but the figures are large enough to suggest that this a genuine influence in the marketplace

7.2 Recommendations

1. Marketing and product development that seeks to maximise benefit from tourists' interests and concerns for the environment should be tackled at the level of the destination, of the Broads as a whole, as a priority over this being a task for individual enterprises.

2. The quality of the scenery and especially the wildlife (linking the two together) should be a fundamental message in the marketing of the Broads, related to all visitors whether on the land or water, and reflected in the brand.

3. Some creative, themed marketing initiatives and packages, liked to wildlife and aimed at a more specialist market, including members of conservation bodies, should be pursued. This may also appeal to a wider market and could be test-marketed in some more general as well as specialist media.

4. All kinds of enterprise should be encouraged to adopt sound environmental management. The fact that many are doing so should become a promotable feature of the destination, on-message as far as the brand is concerned.

5. Enterprises that have reached an identifiable level of environmental management should be clearly recognised as such. This will need to involve some form of respected accreditation process, and, crucially, qualifying enterprises should be clearly flagged up in marketing and information print and websites.

6. Specific projects and initiatives that seek to reduce environmental impacts, such as bio-diesel and specially designed boats, should be supported for environmental reasons. The impact on the market should not be taken as a major justification for them. However, this activity should be actively communicated with a lot of p.r. work as it is likely to generate interest not only in a small environmentally conscious niche market but also amongst the wider travelling public. It also strongly helps to underpin and draw attention to a nature/enironentmally friendly brand, making the messages appear to be real and not simply assertion.

7. More research should be done specifically on how people with an environmental interest relate to boating, and vice versa.