

CSR in Tourism

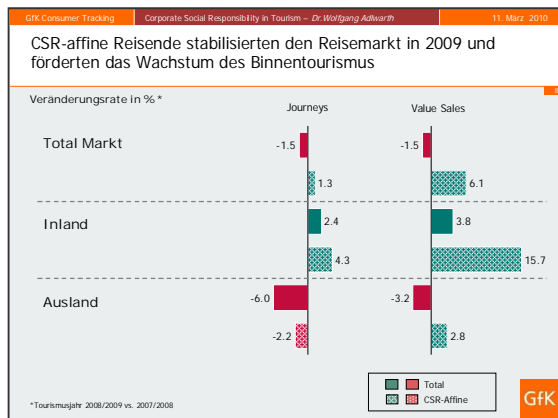
CSR in tourism has become a steady part of the ITB. Already 2009, GfK conducted a first core study in order to evaluate the aspects of CSR from the consumers' perspective. The follow-up study, launched at the ITB 2010, now gives specific recommendations for the optimization of their image among their own target groups, concerning the aspects of CSR. It clarifies regarding which aspects consumers are demanding efforts from the several providers in tourism and which of them already show an above average profile and commitment.

Preface

The study is based on the TravelScope consumer panel in which a sample of 20.000 households is surveyed continuously concerning their travel behavior. Within the same sample, there have been additionally conducted a CSR-related target group profiling, as well as an analysis among the CSR-interested consumers concerning their behavior in terms of traveling.

Development of CSR in Tourism

Domestic tourism enjoyed increasing popularity during prior years. In the tourist year 2009, Germany as destination achieved to grow further within the German target group by 2.4 % in terms of journeys and even by 3.8 % in terms of spendings for pre-booked services. The CSR-interested target group even exceeded this trend within domestic tourism by plus 4.3% in terms of journeys and by a significant above average growth by roundabout 15% in terms of spendings for pre-booked services. This means that the CSR-interested target group, as far as the German domestic tourism is concerned, gained further in importance while it already started from an above average level.



Nevertheless, the CSR-interested target group is also driving other developments to further growth. Thus, this group is especially growing as to cruises (plus 26 percent compared to plus 17 percent in the total market) and the 5 star hotel business (plus 7.3 percent compared to a minus of 2.6 percent in the total market) above the market level. These figures show that the CSR-affine target group is already playing an important role within the travel market today and has a stable growth particularly in regard to the premium segment.

Results of the CSR-study 2010

The financial and economic crisis caused a lack of trust. The consumers more than ever pay attention to the trustworthiness of the suppliers. Aspects, such as reliability, integrity and social responsibility become more important. Traditional brands, German and regional products as well as the continuous uptrend of ecological and fair trade products in 2009 underline this development. The consumers also pay attention to ethical benefits of products, e.g. no allowance of child labor, environmental friendly usage, regional origin, eco-friendly and fair trade.

What are the consumers' demands in the tourism market regarding social responsibility?

In general, nature conservation and preservation of unspoiled biotopes are highly valued: for 30% of the consumers this is the most important issue tour operators should be committed to, concerning holiday regions even 48%. Preservation of climate ranks second with 22%, but with regard to traffic- and transport services it is the most important topic with 41%.

Social standards and human working conditions – also with regard to business partners - are fairly important for tourists, too. This applies particularly to tour operators: in the opinion of 14% of all travellers tour operators are primary expected to be committed to this aspects in the CSR-sector.

Tourism providers are hardly associated with social responsibility, so far. About 75% to 80% of the travellers are not in the position to estimate their CSR-image. The sole exception in the sector transport services is the Deutsche Bahn. Still, nearly 50% of the traveling households associate the Deutsche Bahn with social engagement, mostly in the sectors preservation of climate and save of energy. Among the destinations, the North Frisian Islands are estimated as highly engaged in the fields of nature conservation (56%) and preservation of climate (42%) but also regarding preservation of buildings, memorials and cultural inheritance (35%). For tourists, who have already traveled to the North Frisian Islands, these figures increase to 76%, 58% and 50%. Other regions, e.g. the Italian Adria or the Red Sea have significantly worse estimations.

Thus, the study does not only offer precise starting points for an improvement of the CSR-images for all sectors of the tourism business. Moreover, it identifies the expectations of the German tourists in view to CSR and reveals shortcomings.

For further information don't hesitate to contact our TravelScope team.

The Study

The GfK MobilitätsMonitor continuously measures the mobility behavior for every kind of trips over 50 km, including all purposes. It surveys this information in a representative panel sample of 20,000 households. The objective of the GfK MobilitätsMonitor is to survey the complete mobility of the Germans including all transportation means and purposes, and to measure behavioral changes of the persons over time.

A part of the GfK MobilitätsMonitor, namely GfK TravelScope, has been tracking the behavior in terms of holiday trips for years. Due to its panel approach, this instrument measures the holiday plans and actual trips. This allows for in-depth analysis as e.g. realization shares or buyer migration analysis, offering you precious information for your marketing.

GfK SE

Bereich Panel Services Deutschland
Nordwestring 101
90419 Nürnberg
Germany

Your contact person: Roland Gaßner - Tel. +49 911 395-4535

www.gfk-travelscope.com

