

# Tourists' Perceptions on Environmental Issues

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# Objectives of study

- To assess the general level of sensitivity to environmental issues among tourists.
- To evaluate the importance given to eco-friendly hotels when booking accommodation.
- To determine the willingness of tourists to pay more for a green hotel.
- To establish the level of awareness of eco-labels among tourists.



# Methodology

- Structured personal interviews were conducted with tourists at the departure lounge at the Malta International Airport.
- Data collection was carried out during the months of April to mid-May 2009.
- Interviews were conducted two to three times weekly targeting flights from the UK, Germany, Italy, France and Scandinavia.
- The target sample was 100 for each market. Only tourists staying in hotel-type of accommodation were interviewed.
- A total of 497 valid interviews were conducted.

# Levels of sensitivity to environmental issues

- All markets expressed high levels of sensitivity. (Average Scale: 8)
- Italian tourists appear to be the most sensitive to environmental issues (80%).
- These were followed by Scandinavians (70%).

	<b>High Sensitivity</b> %	<b>Average Sensitivity</b> %	<b>Low Sensitivity</b> %
<b>TOTAL</b>	<b>67.9</b>	<b>29.5</b>	<b>2.6</b>
<b>BRITISH</b>	62.3	35.8	1.9
<b>GERMAN</b>	65.4	30.8	3.8
<b>ITALIAN</b>	<b>80.2</b>	17.8	2.0
<b>FRENCH</b>	61.6	33.7	4.7
<b>SCANDINAVIAN</b>	<b>69.7</b>	29.3	1.0

Scale: (1-10): 1 not sensitive at all, 10 very sensitive

# Levels of sensitivity to environmental issues

## High sensitivity to environmental issues

**68% of total respondents** expressed high levels of interest in environmental issues surrounding us.

### Socio-demographic profile:

- **Age:** Elder generation (those aged 55-64 and those over 65 years of age)
- **Occupation:** Directors and professionals; as well as retired individuals
- **Travelling party:** Those travelling with business associates and lone travellers

## Average/Low levels of sensitivity to environmental issues

**Around 3 out of 10** attributed average levels of sensitivity. **3% of total respondents** expressed low levels of sensitivity.

### Socio-demographic profile:

- **Age:** Younger generation (those aged 25-34, followed by those under 24 years of age)
- **Occupation:** Students
- **Travelling party:** Those travelling with family

# Levels of importance to environmental issues when booking accommodation

- 47% of interviewed tourists assigned high levels of importance to environmental friendly measures when booking accommodation. (Average Scale: 7).
- Italians assigned the highest levels of importance followed by Germans.

	<b>High Importance</b> %	<b>Average Importance</b> %	<b>Low Importance</b> %
<b>TOTAL</b>	<b>47.4</b>	<b>32.7</b>	<b>19.9</b>
<b>BRITISH</b>	37.7	36.8	25.5
<b>GERMAN</b>	<b>55.8</b>	34.6	9.6
<b>ITALIAN</b>	<b>57.0</b>	23.0	20.0
<b>FRENCH</b>	42.4	36.4	21.2
<b>SCANDINAVIAN</b>	43.3	33.0	23.7

Scale: (1-10): 1 not important at all, 10 very important

# Levels of importance in environmental issues when booking accommodation

## High importance when booking accommodation

**47% of total respondents** expressed high levels of importance to environmental issues when booking accommodation

### **Socio-demographic profile:**

- **Age:** Elder generation (those aged 55-64 and those over 65 years of age)
- **Occupation:** Professionals, followed by retired individuals and directors
- **Travelling party:** Those travelling in an organised group and with business associates

## Low levels of importance when booking accommodation

**20% of total respondents** expressed low levels of importance in environmental issues when booking accommodation

### **Socio-demographic profile:**

- **Age:** Younger generation (those aged 25-34, followed by those under 24 years of age)
- **Occupation:** Manual workers and students
- **Travelling party:** Those travelling as a couple, followed by family travellers

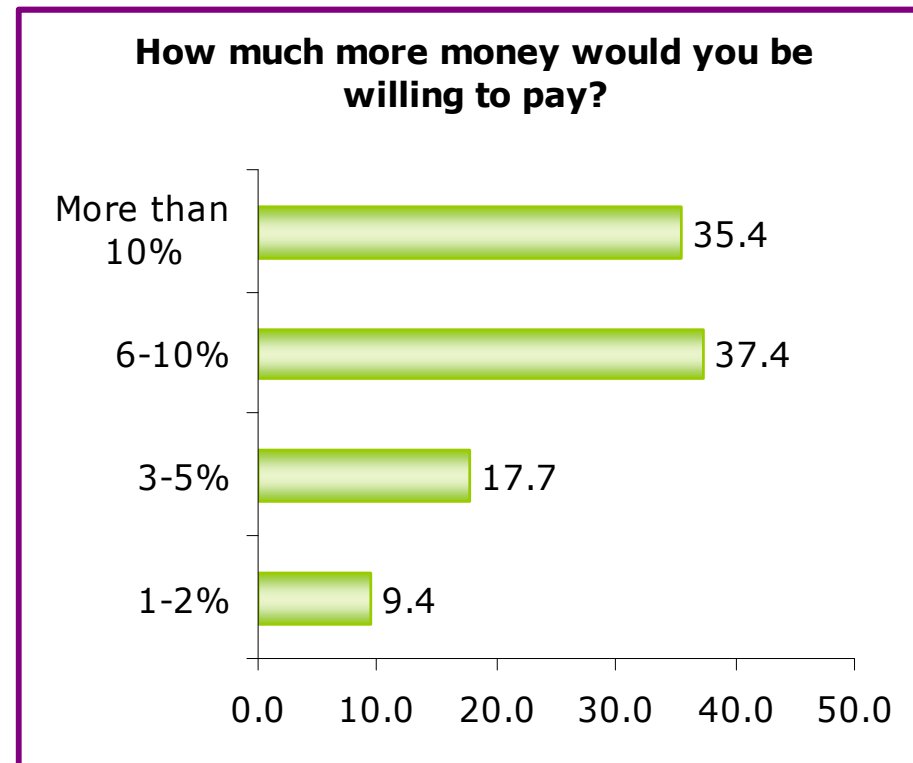
# Views of Environmentally Friendly Issues

- Nearly seven out of ten tourists showed their interest in general environmental issues.
- Nonetheless, only 47% assigned high levels of importance to environmental issues when booking accommodation.
- This implies that the majority of respondents have expressed their interest in overall environmental issues. However, this is not necessarily reflected in their accommodation booking behaviour.

	<b>Level of interest in overall environmental issues</b>	<b>Level of importance when booking accommodation</b>
High	67.9%	47.4%
Average	29.5%	32.7%
Low	2.6%	19.9%
<b>Average Scale</b>	<b>7.96</b>	<b>6.68</b>

# Willingness to pay more

- 56.6% of respondents are willing to pay a higher room rate to stay in a hotel that adopts eco-friendly measures.
- Tourists are willing to pay an average of 8% more on current accommodation costs.



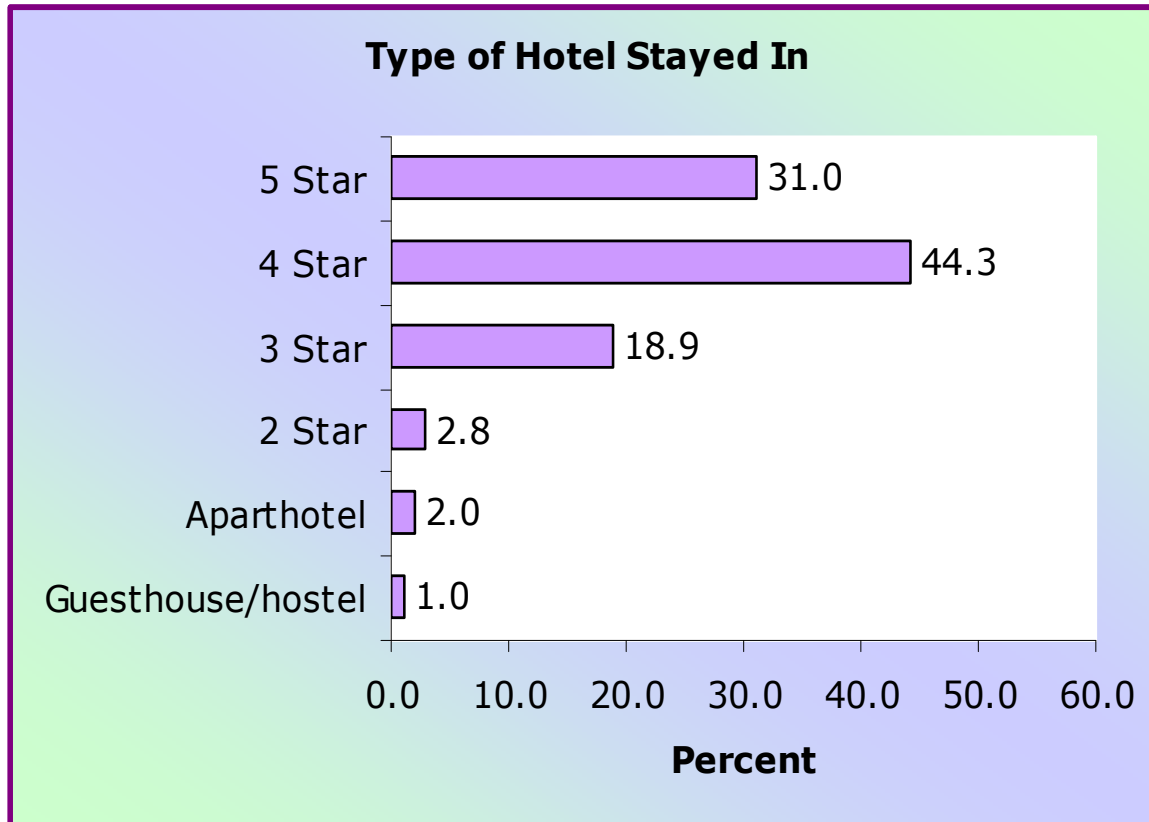


## Willingness to pay more

Out of those who are willing to pay a higher room rate (56.6% of total respondents):

- ➔ 61.7% attributed **high levels of importance** to environmental issues when booking accommodation.
- ➔ 26.7% attributed **average levels of importance** to environmental issues when booking accommodation.

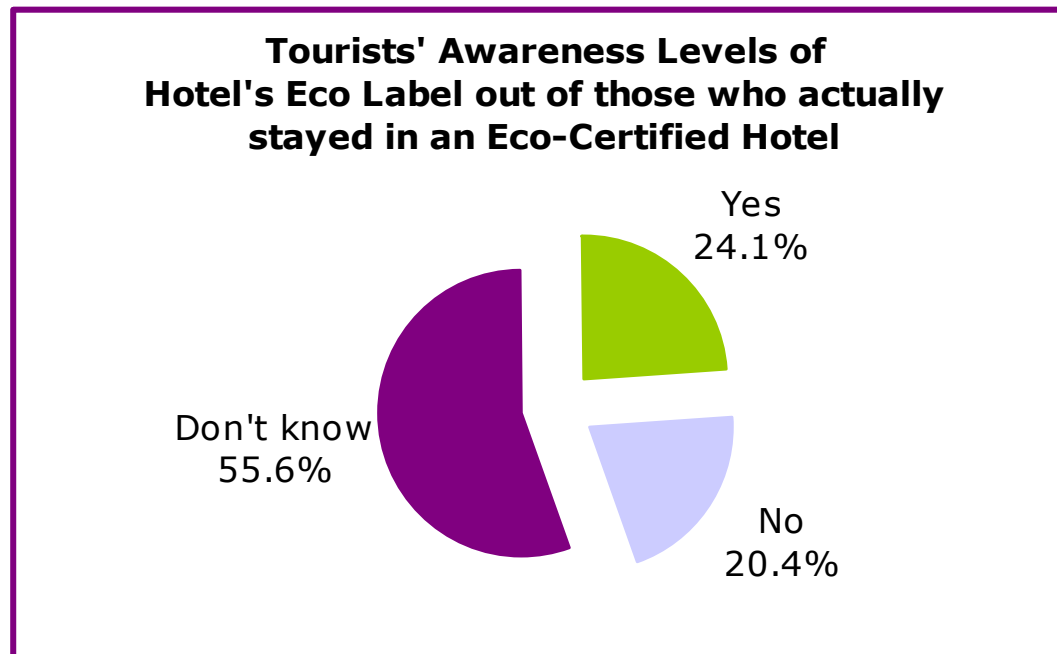
# Accommodation used in Malta



- Slightly more than four out of ten respondents stayed in 4 Star hotels.
- Around three out of ten stayed in 5 star hotels.

# Use and Awareness of Eco-certified hotels

- **22.3% (111) of total respondents actually stayed in an eco-certified hotel.**
- Awareness levels of hotel's eco-label is low. Out of respondents staying in an eco-certified hotel, **only 26 (24.1%) were aware of hotel's eco label.**



# Tourists staying in an eco-certified hotel

- Out of the surveyed respondents, the largest share of tourists staying an eco-certified hotel were French:

	<b>TOTAL</b>	<b>BRITISH</b>	<b>GERMAN</b>	<b>ITALIAN</b>	<b>FRENCH</b>	<b>SCANDINAVIAN</b>
Yes	22.3%	17.9%	28.8%	22.8%	30.2%	13.0%
No	77.7%	82.1%	71.2%	77.2%	69.8%	87.0%

- Awareness levels of eco-certification was low for all markets. Awareness levels were highest amongst Scandinavians with a share of 30.8%:

	<b>TOTAL</b>	<b>BRITISH</b>	<b>GERMAN</b>	<b>ITALIAN</b>	<b>FRENCH</b>	<b>SCANDINAVIAN</b>
Yes	21.2%	17.6%	27.6%	26.1%	19.2%	30.8%
No	21.2%	11.8%	24.1%	17.4%	26.9%	15.4%
Don't know	57.7%	70.6%	48.3%	56.5%	53.8%	53.8%



# Awareness of environmental friendly measures adopted by Hotel

- **49% of respondents were aware that hotel stayed-in adopted some kind of environmentally-friendly initiatives.**

89.9%	Re-using towels
69.6%	Re-using bed sheets
58.6%	Automatic turn-off system for lighting in rooms
34.6%	Low consumption light bulbs
24.9%	Separation of waste
23.2%	Half-flush for toilets
13.9%	Soap dispensers in bathrooms

**(N=237 respondents, those aware of environmentally-friendly initiatives)**



## Other environmentally-friendly measures adopted included:

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Notice to turn off lights

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Notice not to waste water

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Use of sensor lights

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Salt water for swimming pool

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Automatic turn-off lights in balcony

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Information leaflet on environmentally-friendly measures


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Collection of used batteries

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Other measures including general notices on environmental initiatives, no use of plastic bottles

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# Participation in eco-friendly initiatives

- **A significant share of tourists who were aware of eco-friendly initiatives adopted by the hotel opted to participate especially by re-using towels and bed sheets:**

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## **Percentage of Respondents participating in environmentally friendly measures:**

73.8%	Re-using towels
47.3%	Re-using bed sheets
23.6%	Separation of waste
15.6%	Half-flush for toilets

**(N=237 respondents, those aware of environmentally-friendly initiatives)**

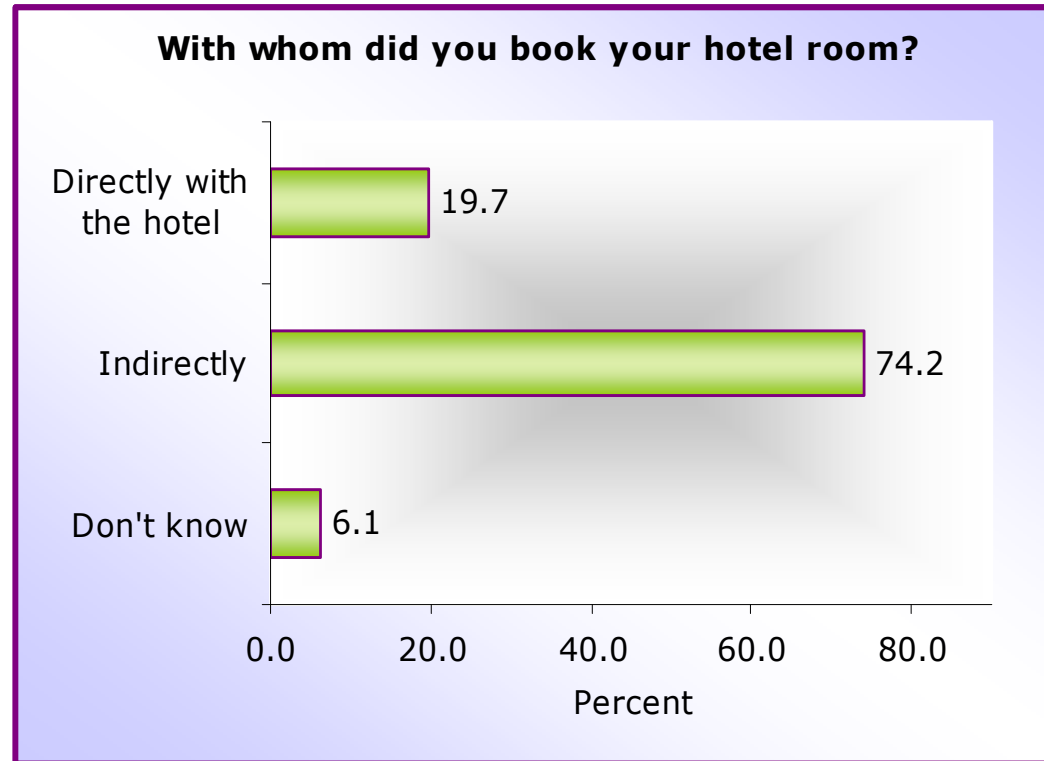


# Demographics

- 52.6% of respondents were male and the remaining 47.3% were female
- One of every four respondents were aged between 45-54 years followed by those in the 55-64 age bracket (22%). 25-34 and 35-44 age brackets had a share of 18% each.
- Surveyed respondents spent an average of 6.7 nights in Malta. Seven out of ten spent '4 to 7' nights on the island.
- Around 46% travelled in company of their spouse or partner. 17% travelled with their family while 14% travelled with friends. 9% were lone travellers.
- 'Leisure' dominated as the main purpose of trip with a share of 86%. 12% were business travellers.
- 23% of respondents were professionals followed by 18% who were retired individuals. 14% were office or retail workers whilst 13% occupied a managerial position. 6% were students.

# Booking arrangement

- 55% of respondents booked their accommodation online.
- Out of total respondents, nearly three out of four booked the hotel room with a tour operator/travel agent or a booking engine. One fifth made direct bookings with hotel.





# Conclusions

- 68% of total respondents expressed high sensitivity to environmental issues.
- However less than half of total respondents (47%) take into account environmental friendly measures adopted by hotels when choosing/booking accommodation.
- Only 22% of respondents stayed in eco-certified hotels. Furthermore the large majority of these respondents (76%) were not aware of this accreditation.
- The large majority of tourists who were aware of eco-friendly measures adopted by hotel chose to participate in a variety of ways.
- This implies that rather than at booking stage, more importance is given to environmental measures adopted in hotels once at the destination.



# Conclusions and Recommendations

- The fact that the majority of tourists staying in an eco-labelled hotel were not aware of the hotel's accreditation implies that:
  - These tourists did not choose the hotel because of its eco-label;
  - Eco-friendly hotels should market their 'eco label' more intensively to gain competitive advantage and raise awareness levels (80% of respondents attributed high/ average level of importance to environmental issues when booking accommodation).



# Conclusions and Recommendations

- 57% of respondents claimed that they would be willing to pay an average of 8% more on current accommodation costs in order to stay in a hotel that adopts eco-friendly measures.
- Simultaneously, less than half (47%) of respondents actually attributed high levels of importance to environmental issues when booking accommodation.
- Therefore, hotels have to be cautious if they were to consider charging a higher price in relation to eco-friendly measures adopted as higher prices may result in a decline in demand.



# Thank you for your attention

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