

Selected findings from an exclusive
single question survey on

Fairtrade Travel Offerings

As part of Reiseanalyse 2007 (RA 07)

EED TOURISM WATCH + F.U.R
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prepared by
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F.U.R – Forschungsgemeinschaft Urlaub + Reisen

Church Development Service -
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Preface

With more and more people becoming increasingly selective in what they buy, the term “consumer” hardly applies anymore. For most generations, consumption has become more a matter of lifestyle. Choices are more deliberate and careful. People not only look for quality but are increasingly interested in questions of where the products are produced and under what kinds of conditions they are made and processed. The focus has shifted to the people and communities behind the product. No one wants to buy “socially contaminated” products nowadays. But despite the growing interest in ethical buying, there is still a lack of much-needed information and transparency. While ingredients are listed in detail, for example, information regarding the social aspects of production is missing entirely from labels and product leaflets. Not even the Consumer Information Act includes this kind of information.

The LOHAS¹ demographic has been recognized by consumers and trend researchers for some time now. People belonging to this group, though principled and focussed on sustainable practices, are far from anti-consumption. And they are also frequent travellers. The turn toward ethical purchasing has trend researchers talking about a “moral revolution” in consumption. While ringing of marketing lingo, the trend does indeed point to an unmistakable increase in ethical buying behaviour. The volume of Fairtrade²-certified products increased by 100% in Germany, with long-haul travellers purchasing more than the general population.

Together with the association for travel research Forschungsgemeinschaft Urlaub und Reisen (F.U.R) we’ve included in Reiseanalyse 2007 a number of survey questions regarding traveller knowledge of fair trade and traveller acceptance of a potential Fairtrade label for tourism services. The results of the survey are more than encouraging and send a very clear signal that Fairtrade certification options for tourism services and products with the Fairtrade Labelling Organizations International (FLO) should indeed be pursued.

Travel companies with high standards should not underestimate the potential behind the move toward ethical buying – indeed, it would serve them well to bring transparency to the social aspects behind their travel offers.

EED TOURISM WATCH
Heinz Fuchs

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¹ Lifestyle of Health and Sustainability

² See www.transfair.org and www.fairtrade.net

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A summary of the key findings

Fairtrade products have gained everyday familiarity in retail and have become a widely accepted product type:

54% of the population is familiar with Fairtrade products found in retail stores, and 18% of these people (one-third of them) have actually purchased Fairtrade products in the past.

Given this trend, and based on efforts by a variety of organizations to promote “fairer” conditions for “tourism of the rich into poor countries”, thoughts have turned to extending Fairtrade standards to the tourism industry.

**Approximately one-third of the population (32%) thought Fairtrade travel offerings would be a good idea;
27% of all Germans said they would book Fairtrade travel packages.**

Persons who have travelled in the past three years to destinations likely to be considered in the initial phase for Fairtrade travel packages, i.e. recent long-haul travellers (approx. 4.1 million people), and especially those who have purchased Fairtrade retail products at least once in the past, demonstrate a markedly higher level of interest and greater disposition to book such tours.

**42% of all long-haul travellers (1.7 million) or
64% of long-haul travellers familiar with Fairtrade products (0.8 million)
thought Fairtrade travel would be a good idea.**

**37% of all long-haul travellers (1.5 million) or
57% of all long-haul travellers familiar with Fairtrade products (0.75 million)
said they would also book Fairtrade travel offerings.**

When narrowed down, the target group for Fairtrade holiday travel (consisting of individuals who are generally interested in such options and likely to notice them) – based on recent long-haul travel (2004-2006) and interest in Fairtrade travel options – may well include between 1 and 5 million people; approx. 1.5 million can be considered actual buyers.

Addition potential is found among those who are sympathetic to and interested in the cause, with numbers reaching upwards of 15 - 20 million; Fairtrade offerings receive positive reception from this group. The number of potential purchasers is by no means insignificant.

Individuals found in the primary target group of recent long-haul travellers have **above-average levels of education, higher income and are from the higher social classes**. They are well-travelled and travel frequently.

The analysis also indicated that persons in the target group expect the following from Fairtrade travel offerings:

- 1. No child exploitation.**
- 2. Fair wages.**
- 3. Preservation of the environment.**
- 4. Respect for local communities and cultures.**

It is safe to say that an interesting market awaits Fairtrade travel that earnestly takes these expectations into account. A more in-depth analysis of the target group indicates that people given to Fairtrade travel are very interested in organized holidays; they have a high degree of experience with travel agencies and are well-versed in online travel planning and booking.

1.0 Introduction

1.1 Study objective

The primary aim of the study was to find answers to the following questions, which were included in Reiseanalyse 2007 as special questions:

1. How familiar are people with Fairtrade products in general and how large is the interest? How familiar and interested are people in Fairtrade in tourism? And how familiar and interested are long-haul travellers in particular?
2. Among long-haul travellers, what characterises the target group for Fairtrade products in terms of the variables sex, age, education, income and social class?
3. What kind of expectations do long-haul travellers have regarding Fairtrade products?
4. Do expectations on Fairtrade products vary based on socio-demographic factors?

The study is structured around this objective. The answers to the questions listed above are discussed in the chapters that follow.

1.2 Methodology

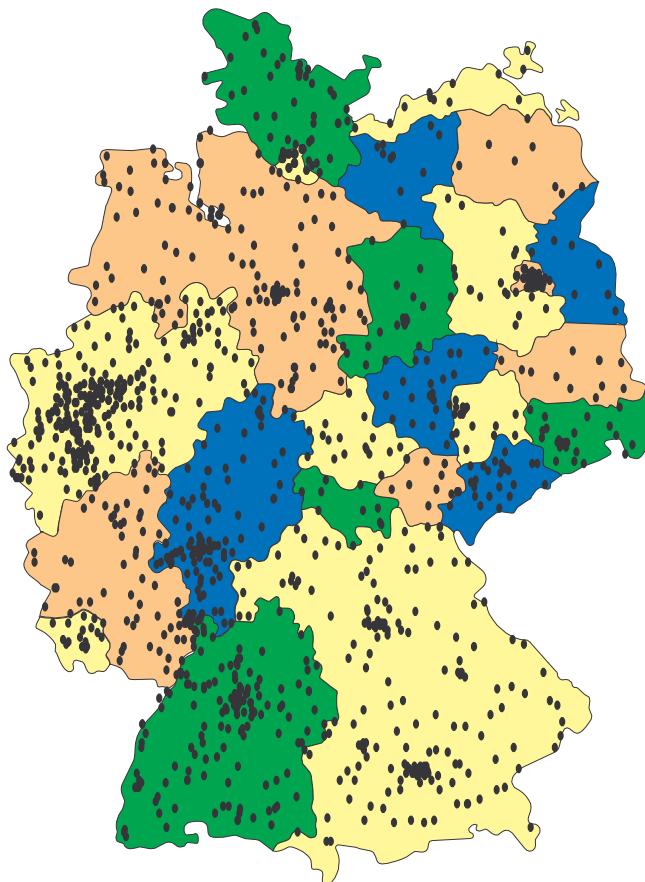
The study is based on two special questions included in **Reiseanalyse 2007 (RA 07)**, a representative study performed by the association for travel research **F.U.R** (Forschungsgemeinschaft Urlaub und Reisen), at the request of TOURISM WATCH, a special desk within the Church Development Service (EED).

Funding for these questions was provided for by the Church Development Service (EED); EED also owns the rights to use the findings for its own PR purposes.

The following pages present in brief the methodology used in RA 07 and its sampling plan. The exact wording of the questions is also presented here.

On the methodology of Reiseanalyse 2007

- ▶ 7,671 personal interviews
- ▶ Approx. 1,500 sample points
- ▶ In private households
- ▶ Respondent age: persons 14 years and older
- ▶ Multi-stage random sampling
- ▶ Representative for German-speaking population 14 years and older (64.89 million)
- ▶ Topic: holiday travel
- ▶ Length of interview: Ø 58 min.
- ▶ Survey period: January 2007

Fig. 1.2-1 Overview of RA 2007 sampling plan

The following questions were asked as part of RA 07 (excerpted from survey):

C17	<p>As you might already know, so-called “fair trade” products marked with the “Fairtrade seal” have been available in supermarkets and department stores for a number of years now.</p> <p>It is now being considered to apply the principles of fair trade to holiday travel.</p> <p>The list below contains statements on Fairtrade products in retail and on Fairtrade travel offerings.</p> <p>Please tell me which statements best apply to you.</p> <p>INT.: Take out list C17! Multiple selections allowed!</p> <p>I am familiar with Fairtrade products in retail stores (supermarket, department store, etc...) <input type="checkbox"/>01</p> <p>I have purchased Fairtrade products in retail stores..... <input type="checkbox"/>02</p> <hr style="border-top: 1px dashed black;"/> <p>I think it would be good if Fairtrade was available for holiday travel, too. <input type="checkbox"/>03</p> <p>I could definitely imagine booking Fairtrade holidays. <input type="checkbox"/>04</p>
C18	<p>“Fair trade” in tourism can mean a number of things. In your opinion, which points listed here should be part of Fairtrade holiday offerings?</p> <p>INT.: Take out list C18! Multiple selections allowed!</p> <p>Good education and employment opportunities for local people..... <input type="checkbox"/>01</p> <p>Guarantee that there is no child exploitation. <input type="checkbox"/>02</p> <p>Respect for local peoples and their cultures <input type="checkbox"/>03</p> <p>Fair wages and salaries for employees <input type="checkbox"/>04</p> <p>Use of local products in hotels and restaurants..... <input type="checkbox"/>05</p> <p>Involvement of local communities in tourism planning and development <input type="checkbox"/>06</p> <p>Health insurance and accident insurance for employees <input type="checkbox"/>07</p> <p>Protection of nature and the environment <input type="checkbox"/>08</p>

These questions were posed to 7,671 survey participants. They were given a list of possible answers and asked to indicate which answers applied best to them personally.

It must be noted that only those interviewees showing sufficient travel experience in the regions being considered for Fairtrade travel offerings were included in the analysis. People belonging to the “**primary target group**” for Fairtrade travel are all recent **long-haul travellers**, i.e. **persons who have travelled at least once to one of the following countries within the last three years:**

- South-East Asia, Southern Asia or Far East Asia
- Caribbean, Mexico, Central America and South America
- West/East Africa or South Africa

For the purpose of comparison answers from the overall population are included in the findings for the first question (C 17 in the survey). Also included are answers from long-haul travellers with experience with Fairtrade products in general; previous Fairtrade experience gives them an additional qualification and places them in the narrowed-down **primary target group**.

Fig. 1.2-2 Long-haul travellers (in millions)

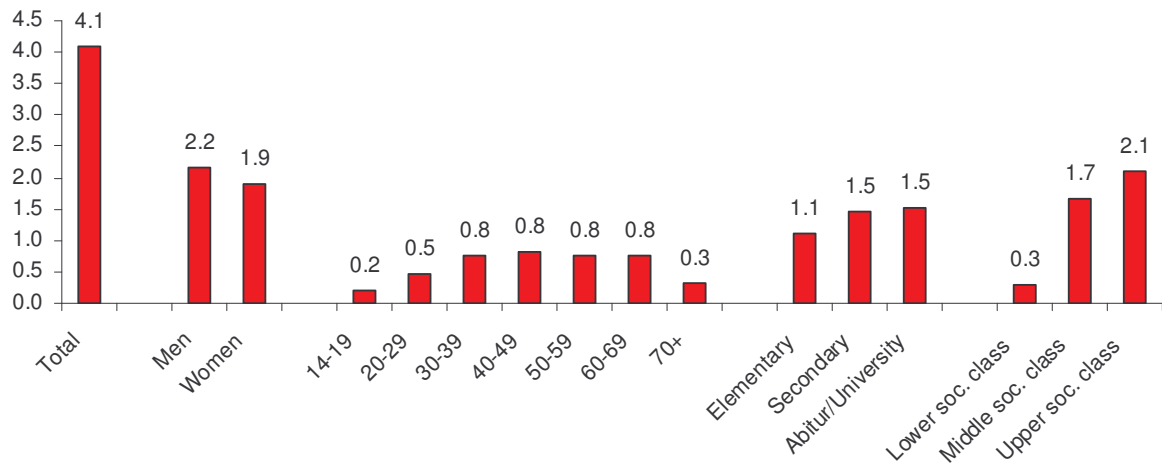
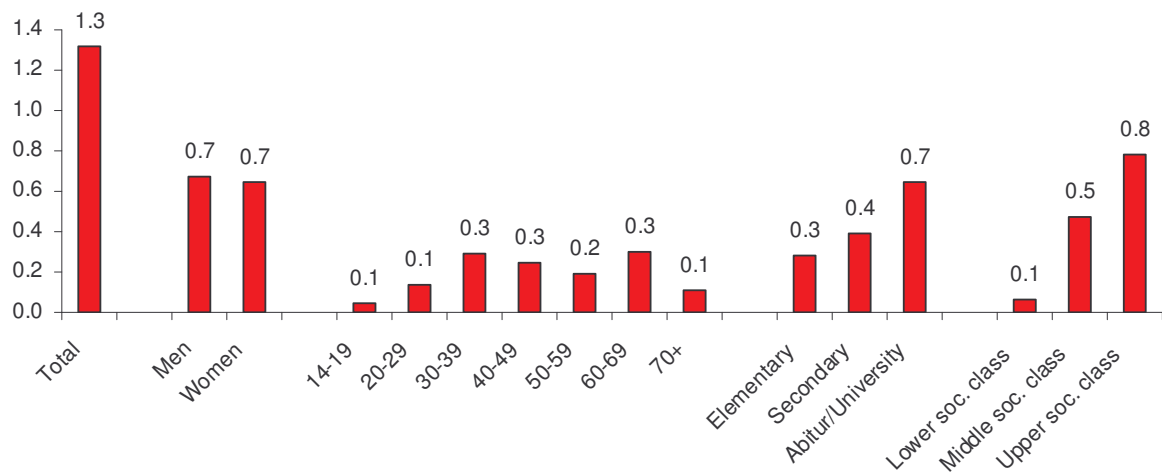


Fig. 1.2-3 Long-haul travellers w/Fairtrade experience (in millions)



The following populations were considered in the analysis of the data:

- A Overall population: all persons over 13 years of age
(Number surveyed (n) = 7,671 or 65.06 million people)
- B Long-haul travellers 2004-2006: all persons who have travelled to one or more of the following destinations within the last three years: South-East Asia, South Asia, Far East Asia, the Caribbean, Mexico, Central America, South America, West Africa, East Africa or South Africa.
(Number surveyed (n) = 481 or 4.08 million people)
- C Long-haul travellers 2004-2006 with experience with Fairtrade products in general, i.e. persons who have both travelled overseas and purchased Fairtrade products at least once
(Number surveyed (n) = 156 or 1.3 million people)

The total population (A) is presented only in reference to the discussion regarding the level of familiarity with Fairtrade products (Question C 17); doing so allows for a depiction of the overall market situation.

The actual target groups of the analysis – sub-groups B and C – are studied in detail; sub-group C is considered the core group within the target group.

It should be noted, however, that due to the limited number of cases (only 156 persons), results from further sub-divisions of this target group should be considered with care (the statistical margins of error for such sub-groups can be relatively large).

The per cent values shown in the graphs and included in the text can be translated into million values when looking at overall results.

For projecting individual sub-groups (e.g. age groups), the number of individuals in the sub-groups forms the basis for calculating the %-value into millions. These reference values are shown in Figures 1.2-2 and 1.2-3.

These graphs also depict the socio-demographic structure of both target groups. It is interesting to note that over 50% of the target group belongs to the upper two social classes and a good 40% of the target group belongs to the middle classes (see Chapter 2.0).

A total of 481 recent long-haul travellers were used as the basis for the greater part of the analysis. This number is large enough to ensure statistically representative results for the group of recent long-haul travellers.

These findings can also be applied to future long-haul travellers in the next three years since, as all RA studies have clearly shown in the past, current long-haul travellers represent the core of potential long-haul travellers.

This is also documented in the study published by Studienkreis für Tourismus + Entwicklung in 2006 entitled **Tourismus in Entwicklungsländer (Tourism in Developing Countries)**, Ammerland 2006. The study was written by Aderhold, Kösterke, von Laßberg, and Vielhaber and can be ordered through the Internet (www.studienkreis.org) for EUR 30.

Additional information regarding the analysis:

The analysis examines the effects of the following socio-demographic criteria on respondent answers; graphs are used to depict the results:

- A: Sex: Male/Female
- B: Age: 14-19, 20-29, 30-39, 40-49, 50-59, 60-69, 70+
- C: Education: Elementary, Secondary School, Abitur/University
- D: Social class: Lower social classes (6th/7th), Middle social classes (3rd/4th/5th), Upper social classes (1st/2nd). Social class is determined by using a point system which combines education, income and occupation.

Fig. 2.0 Socio-demographic structure and travel behaviour of target group

	Overall population	Long-haul trav. total = <u>Primary target group</u>	Long-haul travellers w/Fairtrade experience
Number surveyed	7674	481	156
Number of people in millions	65.06	4.08	1.32
Sex	%	%	%
male	48	53	51
female	52	47	49
Age			
14-19	8	5	4
20-29	12	12	11
30-39	16	19	22
40-49	18	20	19
50-59	15	18	14
60-69	16	19	22
70+	15	8	9
Average age (years)	47.7	46.8	47.7
Stage of life			
Young adult, single	15	14	13
Young adult, married w/o children	7	14	18
Families w/small children (0-5 years)	8	6	4
Families w/school-age children (6-13 years)	11	6	6
Older adult couples	21	25	22
Older adults, single	6	9	6
Senior couples	20	18	21
Seniors, single	11	9	10
Education			
General-level sec. school (Hauptschule)	47	24	22
Secondary school (Mittlere Reife)	35	36	29
Abitur/University	18	37	49
Net household income			
up to EUR 1,499	28	14	10
EUR 1,500 – 2,499	41	32	34
EUR 2,500+	32	53	56
Social class			
Lowest (6 + 7)	24	8	5
Middle (3+4+5)	54	41	36
Upper (1+2)	22	52	59
<u>Travel behaviour</u>			
Holiday travel in 2006			
1 trip	56	55	58
2 or more trips	18	40	36
At least 1 trip (= travel intensity)	75	94	97
Short holiday trips in 2006			
At least 1 short holiday	37	56	60
Travel frequency 2004-2006			
every year, at least 1 trip	61	86	94
not every year, but at least 1	26	14	6
no trips in the last 3 years	13	0	0

2.0 Description of target group

2.1 Socio-demographic structure of the target group

This report will first provide some background information regarding the selected sub-groups in terms of socio-demographic structure and selected aspects pertaining to travel behaviour.

Aside from its overall importance, this background information is key to understanding the results of the survey.

The following sub-groups will be presented in brief:

- the overall population; important for figures regarding familiarity with Fairtrade products in general and functions as a control group for describing the primary target group of long-haul travellers
- **total long-haul travellers 2004-2006**, i.e. persons who have travelled at least once within the last three years to the following regions: South Asia, South-East Asia, Far East Asia, East Africa, West Africa, South Africa or to Latin American countries
- **long-haul travellers with Fairtrade experience** (in general), i.e. long-haul travellers who have purchased a Fairtrade product (retail) at least once

As can be seen in Fig. 2.0, the primary target group of total long-haul travellers and those with Fairtrade experience distinguish themselves from the overall population in the following ways:

- they have higher levels of education
- they have considerably higher net household incomes (a result of higher levels of education)
- they belong to the upper social classes (this is also a result of better education and income, two criteria for determining social class)

The **socio-economic factors** are what distinguish long-haul travellers and especially those with Fairtrade experience from the overall population.

The differences in terms of social-demographic variables such as sex, age or stage of life are minor compared to the socio-economic factors discussed above. Young married couples without children, older couples and singles between the ages of 40 and 60 do, however, travel more often than the other sub-groups.

2.2 General travel behaviour of target group

Due in part to more favourable living conditions, the primary target group has above-average travel experience; this is documented by the fact that members of this group have travelled overseas at least once over the course of the last three years.

- The travel intensity and travel frequency of the target group (over 90%) is considerably higher than that of the overall population (75%).
- The number of individuals that take at least 2 or more holiday trips a year is two times higher than figures given for the overall population.
- They take considerably more short holiday trips (between 2 and 4 days).
- The number of "regular travellers", i.e. people who have taken at least one trip every year over the past three years, is markedly higher than the overall population.

Their travel experience is not based on long-haul travel alone but on their greater level of participation in travel taken as a whole.

In short:

The primary target group of total long-haul travellers and especially the group's core – long-haul travellers with Fairtrade experience – consists of individuals who have higher levels of education and higher income, belong to the upper social classes and travel more frequently and more regularly.

Fig. 3.1-1 Familiarity + experience w/Fairtrade (FT) in general and interest in Fairtrade travel offerings + disposition to book FT travel
Comparison of total population and long-haul travellers 2004-06 (%)

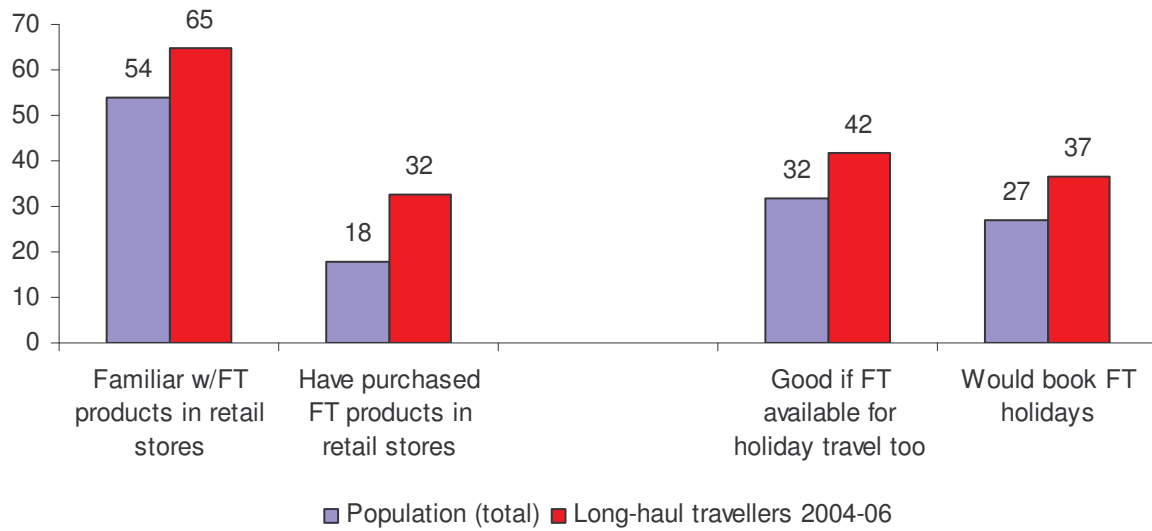
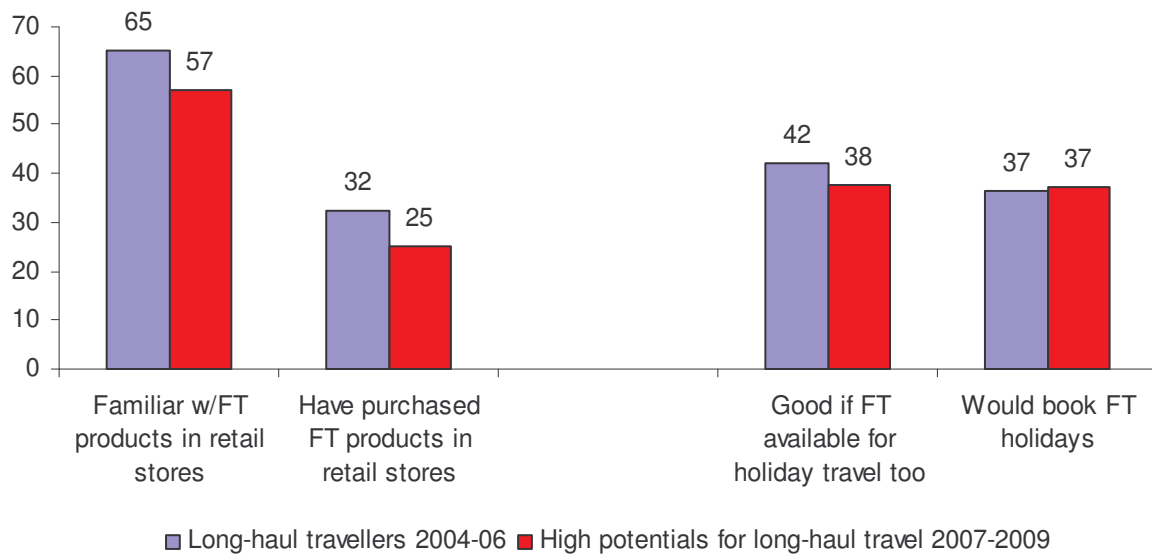


Fig. 3.1-1a Familiarity + experience w/Fairtrade (FT) in general and interest in Fairtrade travel offerings + disposition to book FT travel
Comparison of current and potential long-haul travellers (%)



3.0 Presentation of results

Results of the survey questions will be presented and interpreted as follows in the ensuing chapters:

- Step one: Results for the target group of total long-haul travellers are presented. Results for the overall population are shown only if it makes sense to do so.
- Step two: Socio-demographic impacts are presented separately. For the sake of convenience, socio-demographic factors are depicted in graph form.

3.1 Familiarity/experience with Fairtrade products and interest in Fairtrade travel offerings and disposition to book Fairtrade travel

Looking at the **overall population's familiarity and experience with Fairtrade products in general** (see Fig. 3.1-1):

- 54% of 65.06 million Germans (over the age of 13) – or 35.1 million individuals – know about the existence of Fairtrade retail products in general,
- 18% of Germans (11.7 million), i.e. one-third of those who are familiar with Fairtrade products, say that they have purchased Fairtrade products at least once in the past.

Looking at the corresponding values among the 4.08 million **long-haul travellers**, these values are in part considerably higher than those of the overall population:

- 65% of the long-haul travellers (2.7 million) are familiar with Fairtrade products,
- 32% (= 1.3 million), i.e. approximately every second person familiar with Fairtrade products, has purchased Fairtrade products at least once in the past.

In response to the next question asking what they'd think about Fairtrade travel offerings

- 32% of the population (**20.8 million**) and 42% of long-haul travellers (**1.7 Mio.**) said they thought "it would be good if Fairtrade was available for holiday travel, too."
- and 27% of the population (**17.6 million**) and 37% of all long-haul travellers (**1.5 million**) said they "could imagine booking Fairtrade holidays".

Greater numbers of individuals with long-haul travel experience are familiar with Fairtrade and compared with the overall population, long-haul travellers also purchase Fairtrade products more often.

If one were to look further, shifting the focus to those who are "definitely planning" an overseas holiday in the next three years 2007-2009 (**high long-haul travel potential**), the values for this group – consisting of 3.7 million – are for the most part identical to those of the current long-haul travellers for 2004-2006; 37% of the high potentials say Fairtrade holidays "would be good" and "would book" Fairtrade travel offerings. This figure translates into a potential of **1.4 million** individuals and fits in well with the overall picture.

The key information and raw data necessary for illustrating the market potential for Fairtrade offerings in the tourism industry are identified as such:

- between 17.6 million and 20.8 million of the total 65.08 million Germans are open to the idea of Fairtrade travel offerings and indicate potential interest in Fairtrade travel products/services.
- focussing only on those Germans who have travelled overseas in the last 3 years (4.08 million), those with "potential interest" equals between 1.5 and 1.7 million individuals, or 1.4 million high potentials.

Another key factor, in addition to previous travel experience (long-haul), is familiarity and experience with Fairtrade products in general, as clearly shown in Tables 3.1-2 and 3.1-3 on page 18.

Fig. 3.1-2 Overall population	Long-haul travellers (total)	I am familiar with Fairtrade products in retail stores (supermarket, department store, etc...)	I have purchased Fairtrade products in retail stores.	I think it would be good if Fairtrade was available for holiday travel, too.	I could definitely imagine booking Fairtrade holidays.
No. of cases (= n)	7671	3850	1373	2449	2063
Projection (in millions)	65.06	32.65	11.64	20.77	17.5
	%	%	%	%	%
I am familiar with Fairtrade products in retail stores (supermarket, department store, etc...)	54	100	100	49	46
I have purchased Fairtrade products in retail stores.	18	28	100	31	30
I think it would be good if Fairtrade was available for holiday travel, too.	32% = 20.8 million	31	55% = 6.4 million	100	47
I could definitely imagine booking Fairtrade holidays.	27% = 17.6 million	25	45% = 5.2 million	39	100
No comment	19	0	0	0	0
Source: RA 07, F.U.R. Special Question in collaboration with EED TourismWatch					

Fig. 3.1-3 Long-haul travellers 2004- 2006	Long-haul travellers (total)	I am familiar with Fairtrade products in retail stores (supermarket, department store, etc...)	I have purchased Fairtrade products in retail stores.	I think it would be good if Fairtrade was available for holiday travel, too.	I could definitely imagine booking Fairtrade holidays.
No. of cases (= n)	481	292	156	201	175
Projection (million)	4.08	2.47	1.32	1.71	1.49
	%	%	%	%	%
I am familiar with Fairtrade products in retail stores (supermarket, department store, etc...)	65	100	100	64	60
I have purchased Fairtrade products in retail stores.	32	46	100	49	51
I think it would be good if Fairtrade was available for holiday travel, too.	42% = 1.7 million	44	64% = 0.84 million	100	64
I could definitely imagine booking Fairtrade holidays.	37% = 1.5 million	36	57% = 0.75 million	56	100
No comment	13	0	0	0	0
Source: RA 07, F.U.R. Special Question in collaboration with EED TourismWatch					

Influence of familiarity/experience with Fairtrade products in general

Taking into account the relationship between the level of familiarity/experience with Fairtrade products in general and the general interest in and even disposition to book Fairtrade holidays, it is clear that knowledge of Fairtrade products and actual experience with such products in particular, have an enormous impact on the actual level of interest in Fairtrade travel.

In terms of the overall population, the rate of those who showed interest in Fairtrade travel offerings and indicated likelihood to book such holidays among those who had already purchased Fairtrade products in stores was much higher than in all other sub-groups, i.e. 55% of the 11.64 million individuals with Fairtrade experience in the overall population. This means that 6.4 million of them thought it would be good if Fairtrade was available for travel and 45% (5.2 million) indicates that they would purchase such products/services.

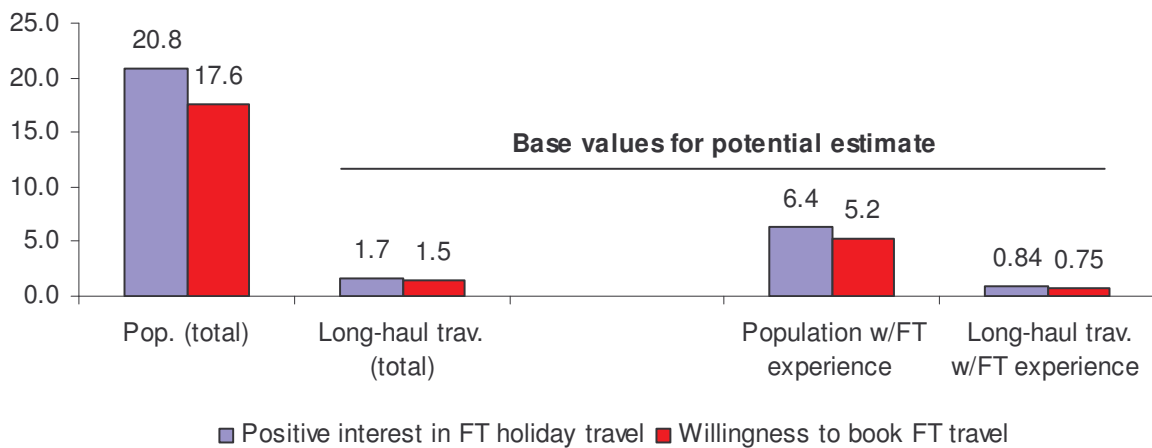
The figures for long-haul travellers are once again considerably higher: 64% of the individuals who had already purchased Fairtrade products in the past and had travelled overseas within the past three year are open to the idea of Fairtrade travel offerings (0.84 million), and 57% (= 0.75 million) would also purchase such products/services (see values printed in bold in Tables 3.1-2 and 3.1-3).

Possible reasons for the correlation between experience with Fairtrade products in general and openness (both interest in and disposition to book) toward Fairtrade holidays are:

- an overall positive position on the principles of fair trade and its political/social premise
- prior experience with Fairtrade products

The following overview presents the base values for market potential after factoring in previous experience with Fairtrade products in general and long-haul travel experience:

Fig. 3.1-4 Potential for Fairtrade travel (in millions)



Conclusion:

Based on these figures, the market potential estimate for Fairtrade travel offerings in Germany is somewhere between 1 million (lower limit) and 5 million (total potential). Moreover, the overall population showed a great degree of openness toward Fairtrade travel products/services.

Fig. 3.2-1: Familiarity with Fairtrade products in general (%)

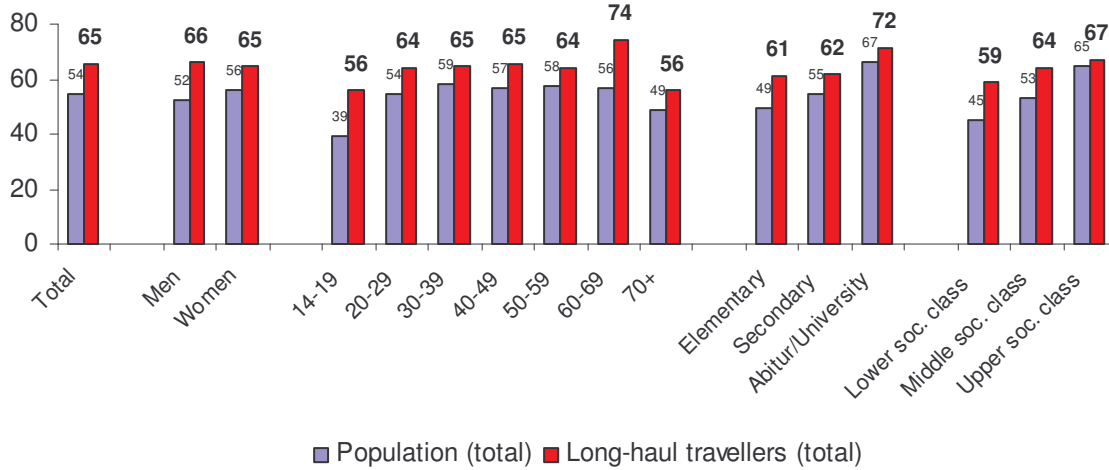
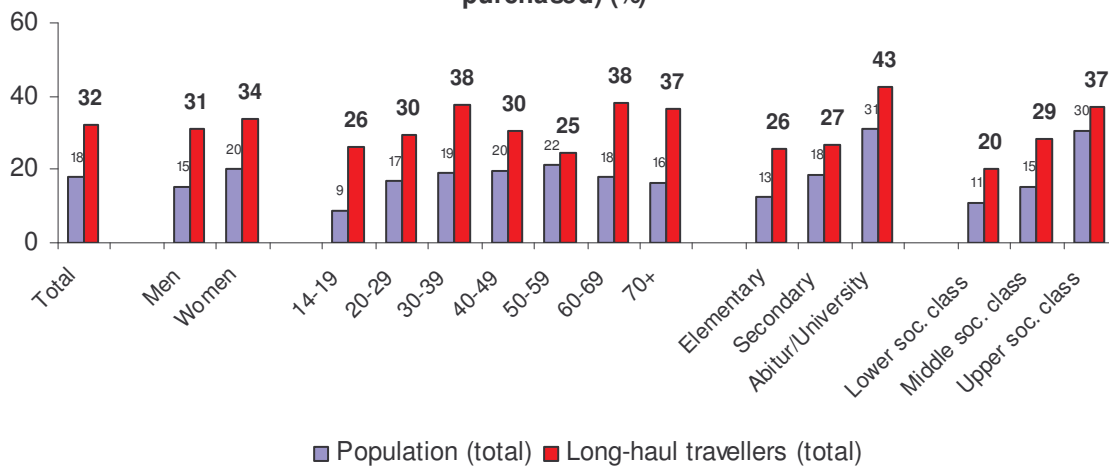


Fig. 3.2-2: Experience with Fairtrade products in general (have purchased) (%)



3.2 Effect of socio-demographic factors on familiarity/experience with Fairtrade products in general

The following socio-demographic analysis focuses primarily on long-haul travellers; figures for the overall population are included only for the purpose of presenting the market situation for Fairtrade products in general.

65% of long-haul travellers (2.7 million) are familiar with Fairtrade products in general (Fig.3.2-1, first column "Total"), and approximately half of them (Fig. 3.2-2) – 32% of long-haul travellers – have **experience** with Fairtrade products in general.

The findings are as follows:

In terms of **level of familiarity**:

- Differences between men and women were negligible.
- 14 – 19 year-olds are far less familiar with such products than the other age groups
- As far as education and social class are concerned (these two are interlinked due to the fact that social class is determined by education, income and occupation, with the latter two factors closely related to education), results indicate that as education levels and social standing increases, so does the rate of familiarity with Fairtrade products.

In terms of **experience** with Fairtrade products in general, findings show:

- The purchase rate of such products is higher among women than men.
- There is greater variance among the age groups in the category of "experience" than "familiarity"; the most frequent purchasers of Fairtrade products are in the "30-39" and "above-60" age groups.
- The influence of educational background and social class in particular is more marked among purchasers than among those who are simply familiar with Fairtrade products.

Taken as a whole, the figures for long-haul traveller are considerably higher than those of the overall population. Aside from the socio-demographic influences as shown here, another separate and significant factor is travel experience (i.e., long-haul travel experience).

Since this is not an analysis of the Fairtrade market, data for the total population is not presented in detail at this time. These values have been included in the graphs purely as background information for whomever may be interested.

Fig. 3.2-3: Positive attitude toward Fairtrade travel offerings (thought it would be good if...) (%)

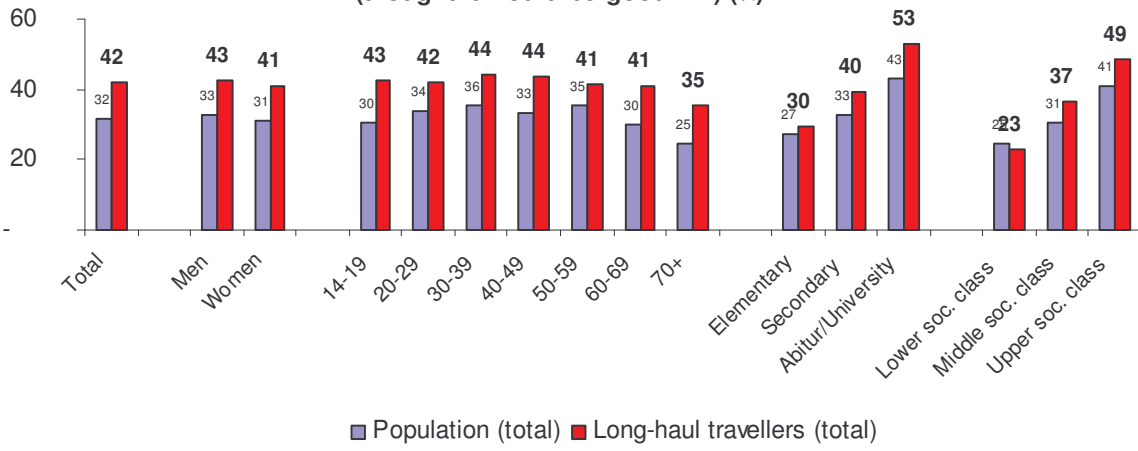
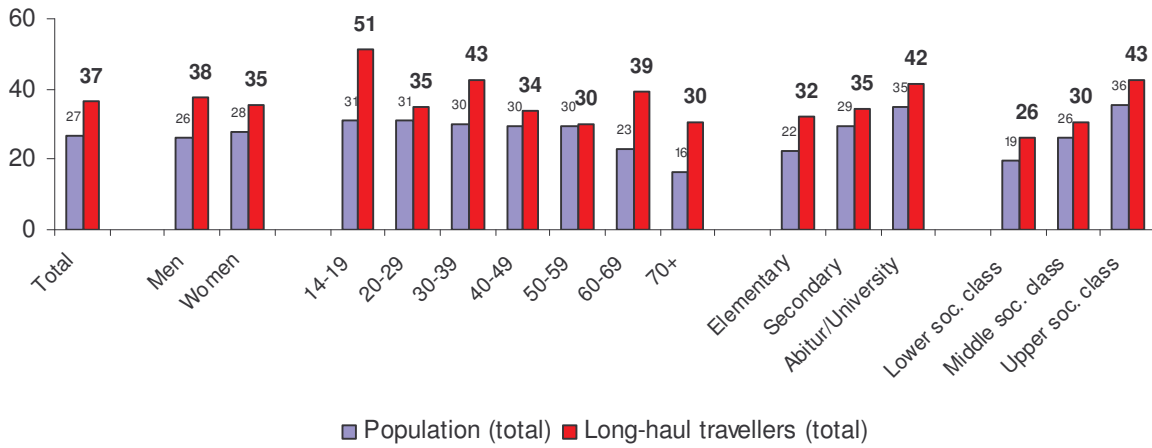


Fig. 3.2-4: Willingness to book Fairtrade travel (%)



3.3 Effect of socio-demographic factors on the interest in Fairtrade travel offerings and on the disposition to book Fairtrade travel

In the next step of the analysis – exploring attitudes toward **Fairtrade travel offerings** and the **disposition to book Fairtrade travel**, and the influence of socio-demographic factors on these two aspects – the following was found:

Results indicating a **positive attitude toward Fairtrade travel offerings** (42% of all long-haul travellers “thought it would be good if Fairtrade was available for travel, too”) break down in the following manner:

- Numbers were more or less similar for men and women (43% and 41% respectively).
- There was also little variation in the figures for the age groups (interest does begin to wane, however, among individuals over 70).
- Education and social class show a marked influence on attitudes; positive attitudes toward Fairtrade travel offerings increase as the level of education increases and the higher the social class.

Results for **willingness to book Fairtrade travel** (37% of all long-haul travellers replied positively) are as follows:

- Men and women are equally inclined to book Fairtrade holidays.
- Considerable variation was seen among the age groups, indicating that as age increases, the disposition to book such trips decreases. The youngest have the greatest booking potential, and the figures for 30-39 year-olds also point to a strong disposition to book.
- The willingness to book Fairtrade travel increases as education level and social class increase.

Overall, results clearly indicate that for both interest and disposition to book, as levels of education increase and the higher the social class, both interest and inclination to book also increase. Both education and income factor into this correlation.

Taking into account that the ranks of the long-haul travellers consist primarily of better educated individuals belonging to the middle and the higher classes in particular, the target group for Fairtrade travel

- is made up primarily of individuals who have finished German high school with Abitur or have gone on to receive a university degree (43% - 49% of the 2.1 million long-haul travellers) and who belong to the upper social classes (see Fig. 1.2-2, p. 12); this translates into 0.9 – 1.0 million individuals,
- 30% - 37% belong to the middle classes, 1.7 million of the total 4.1 million long-haul travellers, a total between 0.5 and 0.6 million, and
- only 23% - 26% of those interested in booking Fairtrade travel come from the lower social classes, their absolute numbers among long-haul travellers only 0.3 million individuals, i.e. well below 100,000.

Of the approx. 1.5 million potential bookers among long-haul travellers (37% of the 4.1 million long-haul travellers), some 1 million (or two-thirds) belong to the upper classes, 30% are from the middle social classes and less than 10% come from the lower social classes.

While results show no variation based on sex, education and income do have an indirect effect on the age structure of both those interested as well as those who are disposed to book.

Fig. 4.1-1 Demands on Fairtrade travel (%) among overall population and total long-haul travellers

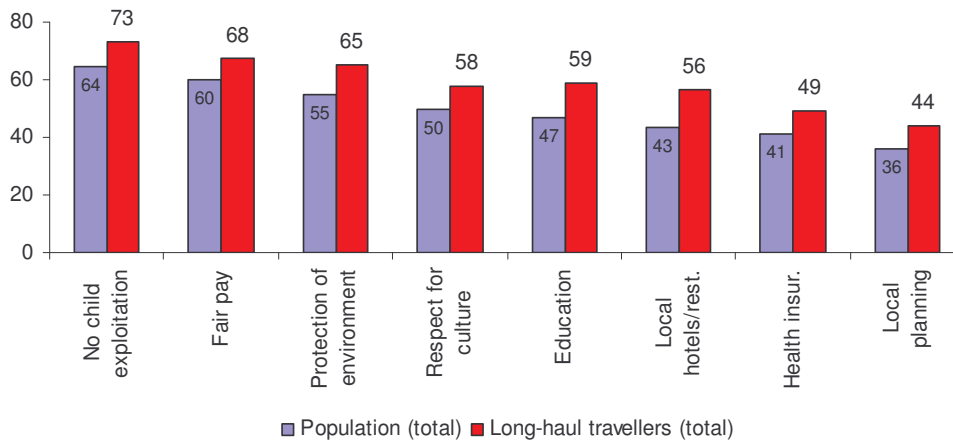


Fig. 4.1-2 Demands on Fairtrade travel (%) from individuals with experience with Fairtrade products in general

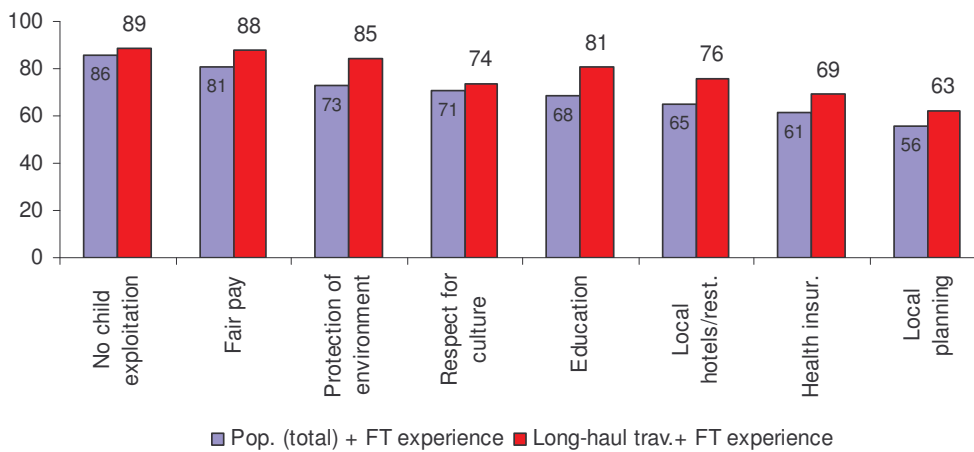
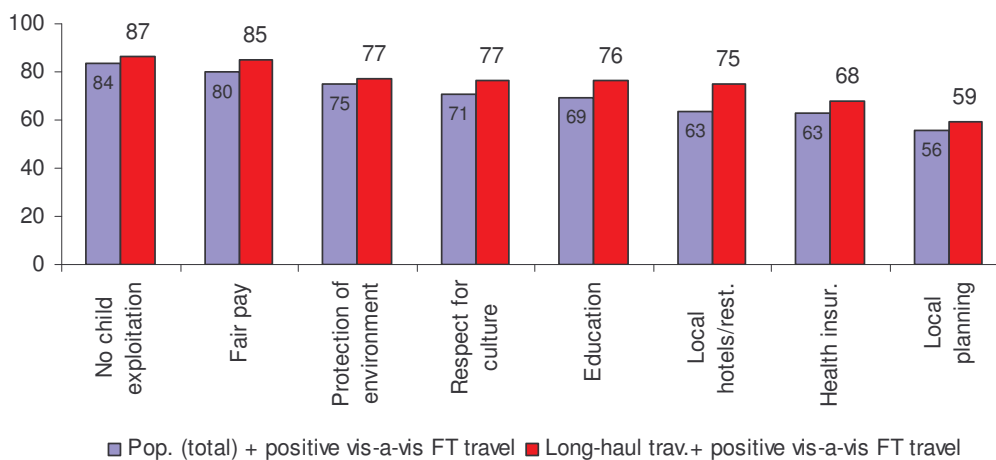


Fig. 4.1-3 Demands on Fairtrade travel (%) from individuals with positive attitude toward Fairtrade holiday offerings



4.0 Demands on Fairtrade travel offerings

The analysis continued by showing survey participants a list of requirements, asking them to indicate which in their opinion “would apply most of all to Fairtrade holiday offerings”.

The question was presented as follows (abbreviated in parenthesis as they appear in the graphs):

“Fairtrade” in tourism can mean a number of things. In your opinion, which points listed here should be part of **Fairtrade holiday offerings**?

INT.: Take out list C18!

Multiple selections allowed!

Good **education and employment opportunities** for local people (= Education)

Guarantee that there is **no child exploitation** (= No child exploitation)

Respect for local peoples and their **cultures** (= Respect for culture)

Fair wages and **salaries** for employees (= Fair pay)

Use of local products in hotels and restaurants (= Local hotels/rest.)

Involvement of local communities in tourism **planning** and development (= Local planning)

Health insurance and accident insurance for employees (= Health insur.)

Protection of nature and the environment (= Protection of environment)

The analysis presents the following:

- values for the overall population and total long-haul travellers (Fig. 4.1-1)
- values for the overall population and total long-haul travellers with the added stipulation of having used/purchased Fairtrade products in the past (Fig. 4.1-2)
- values for the overall population and total long-haul travellers with the added stipulation of thinking it good if there were Fairtrade travel offerings (Fig. 4.1-3)

4.1 Results

The overlying results of this analysis show the following:

The number-one ranked demand across the board, regardless of experience with Fairtrade or degree of openness toward Fairtrade in tourism, is that **such offerings completely rule out child exploitation**.

Ranked second was **Fair pay**.

Ranked third was **protection of the environment** followed by **respect for local peoples and their cultures** in fourth place.

Ranked fifth was **Good education and employment opportunities for local people**.

In sixth place was **the use of local products in hotels and restaurants**, in seventh place **Health insurance and accident insurance** for employees and the **involvement of local communities in tourism planning and development** came in last (eighth) place.

Again, and in all cases, long-haul travel experience has a significant influence on the opinions explored here. Also to be noted is that experience with Fairtrade products (Fig. 4.1-2) has an independent effect on these figures as well.

4.2 Socio-demographic effects on attitudes toward Fairtrade travel offerings

This section of the study presents and comments on the “approval ratings” vis-à-vis the 8 attitude dimensions for the following target groups

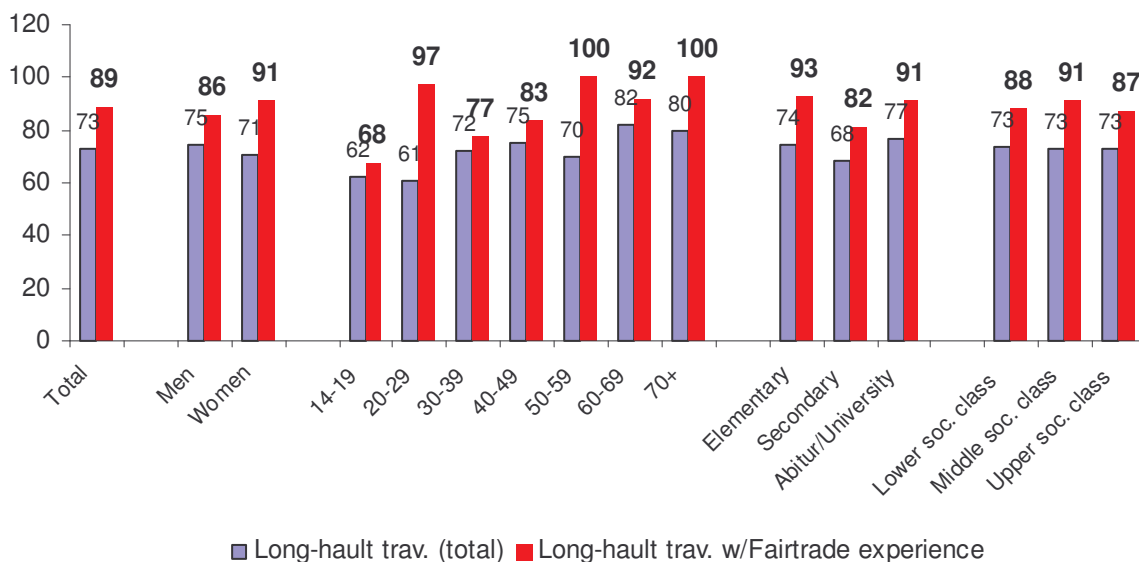
- Long-haul travellers 2004-2006 (total)
- Long-haul travellers 2004-2006 with general experience with Fairtrade products.

4.21 Exploitation of children

The expectation that Fairtrade travel offerings are in **no way connected to child exploitation** is plainly the number-one ranked attitude in the survey.

- 73% total long-haul travellers selected this aspect and
- 89% long-haul travellers with Fairtrade experience agreed with this expectation (see “Total” column at far left in Fig. 4.2.1).

Fig. 4.21 No child exploitation (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

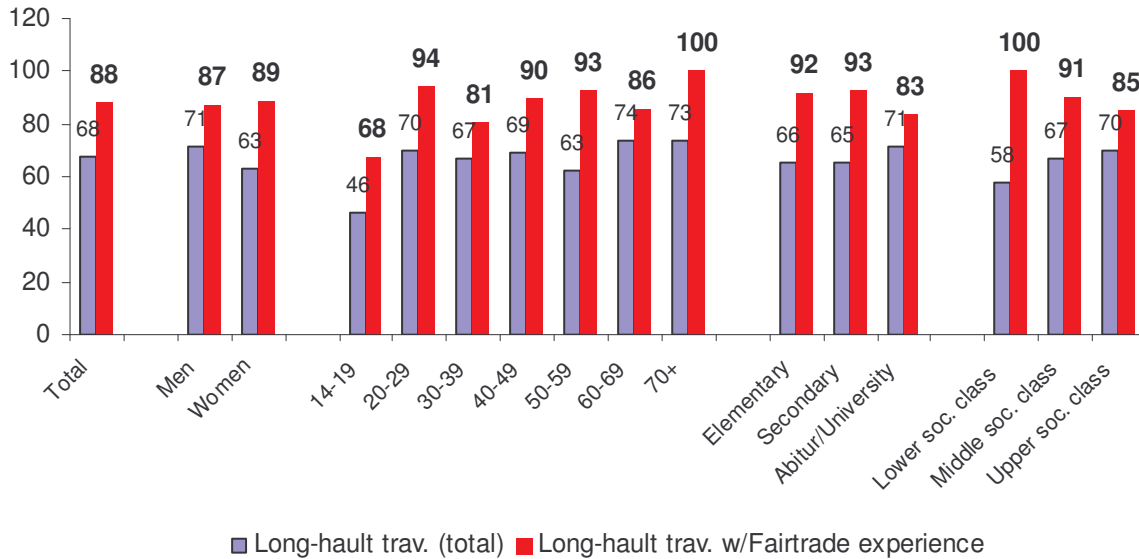
Criteria	Comment
Sex	Sex of respondent has a considerable influence.
Age	Among long-haul travellers, approval increases as respondent age increases; values are even higher among the core target group of long-haul travellers with Fairtrade experience.
Education	Surprisingly, education has no particular influence.
Social class	Equally surprising: social class also has little impact on the attitude toward child exploitation.
Conclusion:	All sub-groups are nearly unanimous in the view that Fairtrade travel offerings should in no way involve the exploitation of children.

4.22 Fair pay

Fair wages and salaries for employees was ranked second place in the list of requirements for Fairtrade travel offerings as follows:

- 68% of total long-haul travellers chose this aspect as did
- 88% of the core target group of long-haul travellers with Fairtrade experience.

Fig. 4.22 Fair pay (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

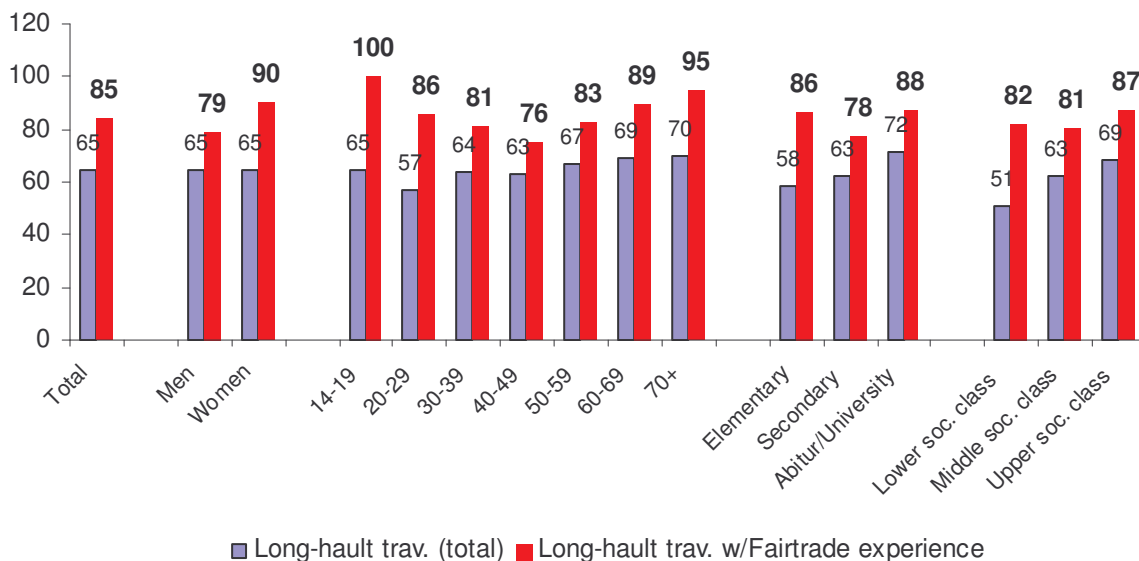
Criteria	Comment
Sex	Sex has a considerable influence on how this aspect was rated.
Age	Age has no conclusive influence on results. Among long-haul travellers total, approval tends to increase as respondent age increases; values are even higher among the core target group of long-haul travellers with Fairtrade experience. With the exception of younger respondents, there was little deviation among the age groups. Age has therefore little influence on this particular attitude.
Education	It is interesting to note that “Fair pay” was more prominent among respondents with lower and middle levels of education than among those with Abitur and university-level education.
Social class	Similarly, the lower, less well-off social classes assigned more importance to fair pay than those who, due to educational background, are more likely to receive better pay.
Conclusion:	While sex and age have very little influence on the outcome in this category, a slight influence can be observed on the part of education and social class; the less well-off consider fair pay more import than those who are more affluent.

4.23 Protecting the environment

Ranked third on the list is **the protection of nature and the environment**; results are as follows:

- 65% of long-haul travellers (total) voted for the protection of the environment, and
- 85% of long-haul travellers with Fairtrade experience

Fig. 4.23 Protection of environment (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

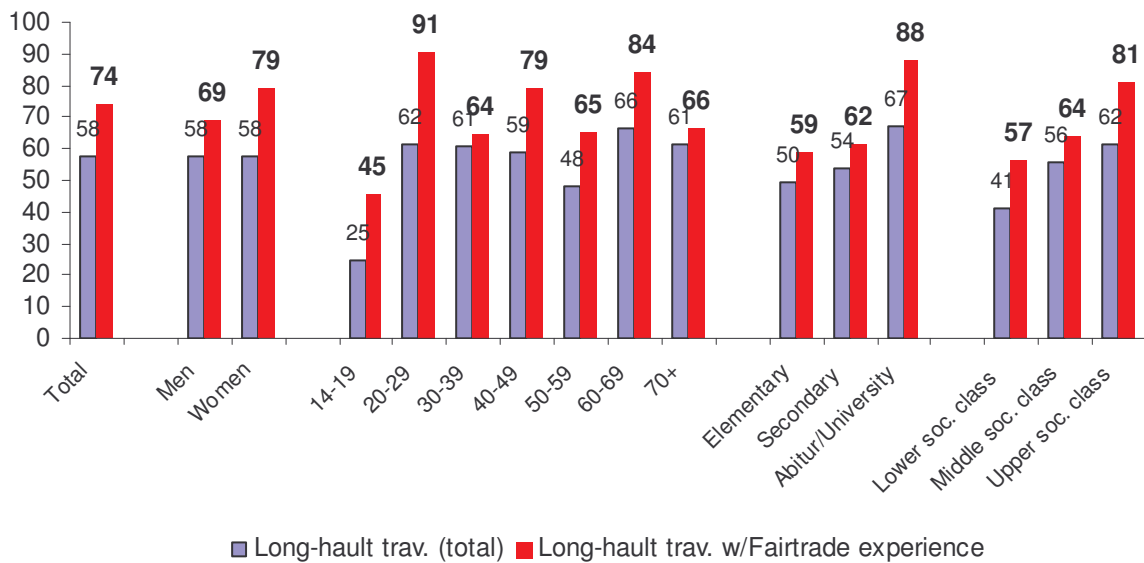
Criteria	Comment
Sex	Among the long-haul travellers with Fairtrade experience, women chose this aspect much more often than men.
Age	Among total long-haul travellers, agreement increased with increasing age; the figures for the core target group of long-haul travellers with Fairtrade experience lie between 76% and 100%; no distinct, coherent influence.
Education	Among long-haul travellers, importance of environmental protection increases as education level increases; this effect is not as prominent within the core target group, however.
Social class	Same as in "Education"
Conclusion:	In line with the generally high value placed on a "healthy environment" by the overall population, the environment also received high rating from all socio-demographic groups with negligible influence on part of individual factors.

4.24 Respect for local peoples and their cultures

The relevant target groups placed **respect for local peoples and their cultures** fourth in the list of Fairtrade requirements. This aspect received

- 56% from total long-haul travellers and
- 74% from long-haul travellers with Fairtrade experience.

Fig. 4.24 Respect for peoples & cultures (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

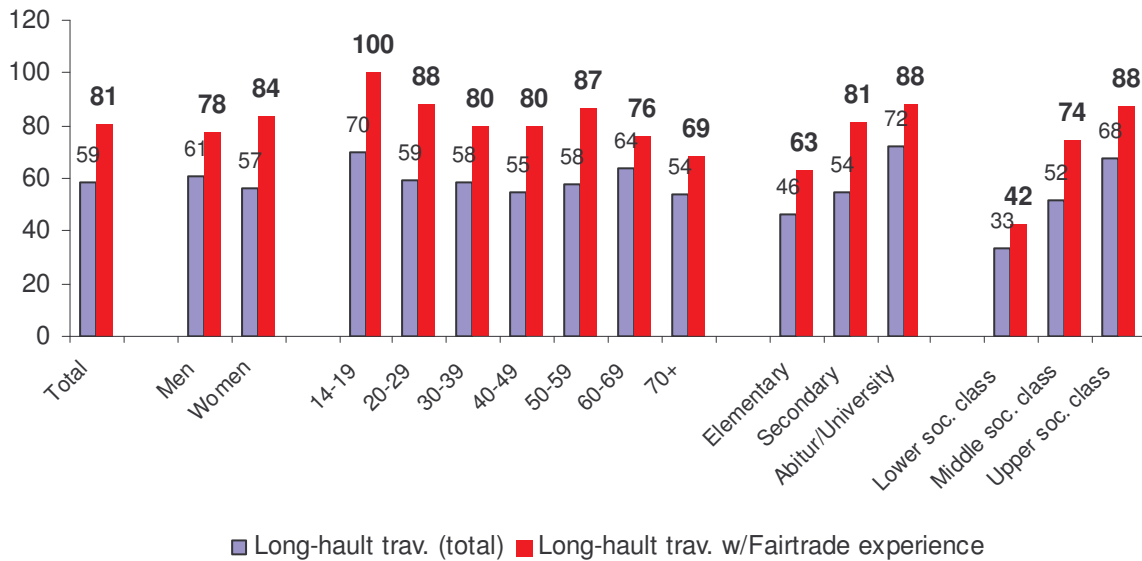
Criteria	Comment
Sex	Among the long-haul travellers with Fairtrade experience, women chose this aspect noticeably more often than men.
Age	Age has no clear influence on this attitude.
Education	Conclusive influence of education on this attitude: The importance of respecting people and their culture increases as the education level of the respondents increases.
Social class	Same as in "Education"
Conclusion:	Clear influence of education and social class; women are evidently more sensitive to the issue of respect. Age shows no consistently conclusive influence.

4.25 Good education

Good education and employment opportunities for local people places fifth on the scale of importance for the target groups, who tallied in as follows:

- 59% of total long-haul travellers and
- 81% of long-haul travellers with Fairtrade experience.

Fig. 4.25 Good education (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

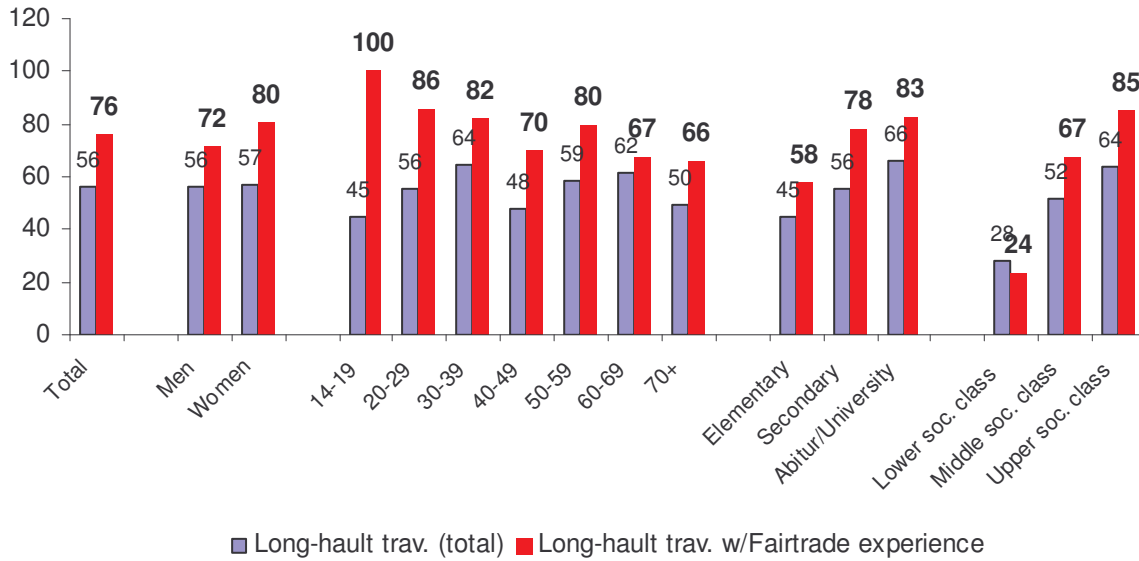
Criteria	Comment
Sex	Sex of the respondent has no clear influence on the attitude.
Age	Younger respondents tend to rate this aspect higher than older respondents.
Education	Conclusive influence of education on this attitude: The importance of educational and employment opportunities increases as education level of the respondents increases.
Social class	Same as in "Education"
Conclusion:	Clear influence of education and social class; age, or rather age-specific life circumstances, also has some degree of influence on attitudes.

4.26 Use of local products in hotels and restaurants

The use of local products in hotels and restaurants ranks sixth among

- total long-haul travellers with 56%
- long-haul travellers with Fairtrade experience with 76%.

Fig. 4.26 Use of local products (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

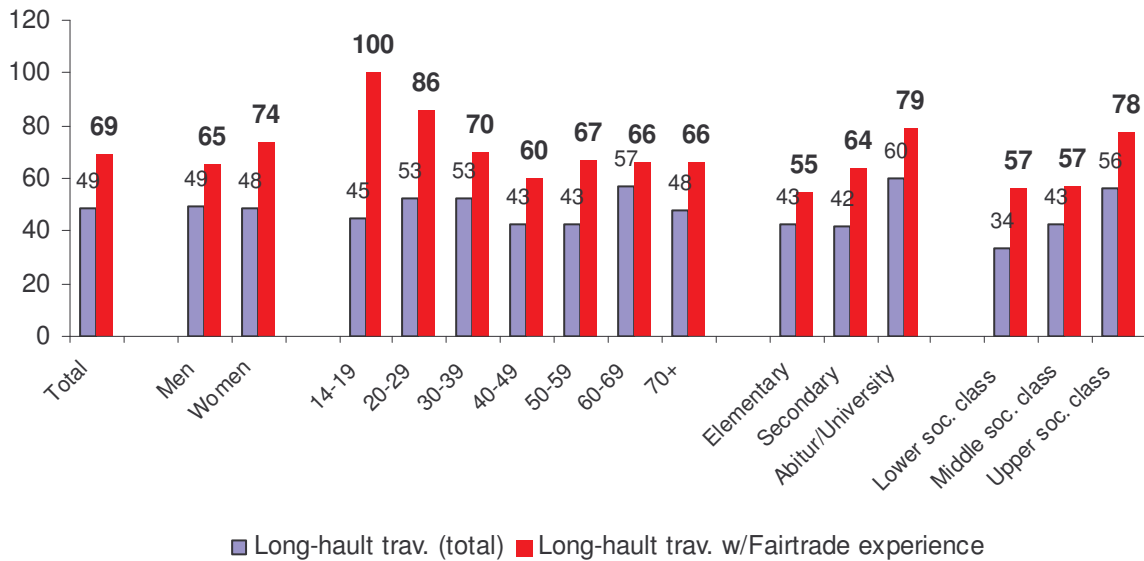
Criteria	Comment
Sex	Sex of respondent has slight influence on attitudes, with women regarding the use of local products slightly more important than men.
Age	Younger respondents tend to rate this aspect higher than older respondents.
Education	Conclusive influence of education on this attitude: The importance of using local products increases as education level of the respondents increases.
Social class	Same as in "Education"
Conclusion:	Clear influence of education and social class; age and sex also have some degree of influence.

4.27 Health insurance and accident insurance

Placing seventh among targeted respondents is **health and accident insurance coverage** for employees. This issue received the following responses:

- 49% from long-haul travellers
- 69% from long-haul travellers with Fairtrade experience.

Fig. 4.27 Health & accident insurance (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

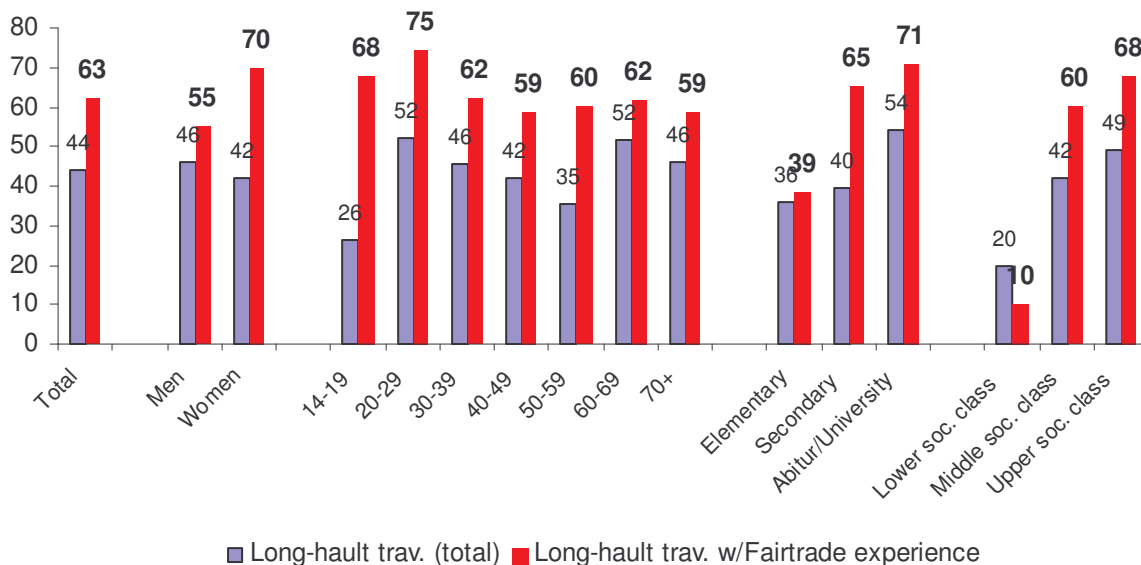
Criteria	Comment
Sex	Sex of respondent influences responses in this attitude just slightly with women tending to be more sensitive to this issue than men (this tendency can be observed in many of the aspects already mentioned).
Age	Younger respondents tend to rate this aspect higher than older respondents.
Education	Clear influence of education on this attitude: The importance of health and accident insurance for employees increases as education level of the respondents increases.
Social class	Same as in "Education"
Conclusion:	Education and social class as well as age and sex have a clear influence on attitudes

4.28 Involvement of local communities in tourism planning and development

The involvement of local communities in tourism planning and development is rated last among “consumers”.

- 44% of long-haul travellers chose this aspect, as did
- 63% of long-haul travellers with Fairtrade experience.

Fig. 4.28 Involvement of local communities in planning (%)



The socio-demographic factors and their influence on rating results shown above break down as follows:

Criteria	Comment
Sex	The sex of the respondent had no clear influence on the attitude.
Age	The age of the respondent had no clear influence on the attitude.
Education	Clear influence of education on this attitude: The importance of involving local communities in tourism planning increases as education level of the respondents increases.
Social class	Same as in “Education”
Conclusion:	Clearly identifiable influence of education and social class on the opinion regarding the involvement of local communities in tourism planning

Fig. 5.0 Fairtrade target group – Marketing-relevant information

	Total population	Long-haul trav. total Core target group	Long-haul travellers w/Fairtrade experience
Number surveyed	7674	481	156
Number of people in millions	65.06	4.08	1.32
	%	%	%
Attitude vis-à-vis organization of holiday travel			
(Multiple selections)			
Responses: Agree completely/ Tend to agree			
Preference: "Completely on my own"	47	43	49
Preference: "Package holiday"	47	53	45
Preference: "Modular travel"	20	29	31
Travel agency use in last 5 years			
Yes, to gather information/advice	52	72	70
Yes, to book a trip	48	72	70
No	38	13	14
Access to the Internet			
Have used Internet to gather information on holiday travel	39	64	66
Will use Internet soon for gathering information	9	6	7
Have used Internet to book holiday travel	19	42	50
Will use Internet soon for booking holiday travel	16	14	9

5.0 Marketing-related aspects of the primary target group

In addition to the socio-demographic and economic analysis of the target group, it is important to outline a few aspects pertaining to the marketing of Fairtrade travel offerings based on target group attitudes and behaviour.

Attitude toward organized travel

People surveyed for RA 07 were asked to state their general preferences regarding the organization of their holiday trips, irrespective of destination.

As seen in the table shown here, long-haul travellers and those familiar with Fairtrade products have a slightly higher interest in “organized” travel such as package deals and the increasingly popular modular travel packages.

Use of travel agencies in the past 5 years

More than 70% of the target group has taken advantage of travel agency services in the past 5 years for gathering information and/or booking a tour operator. Just a small portion of the target group (13%) has never contacted a travel agency.

This high contact rate is due to the fact that long-haul trips, which are inherently complex, often require the services of a travel agent in some form or another – whether in the form of a (semi-) organized (package) vacations or as independently arranged trips which still involve making necessary flight arrangements.

Access to the Internet and Internet experience

Due to higher levels of education and comparatively higher job positions, long-haul travellers have a higher rate of access to the Internet (77%) than the overall population (56%).

At least two-thirds of all long-haul travellers have used the Internet to **research holiday offers** at least once in the past; for the overall population, this number just makes 40%.

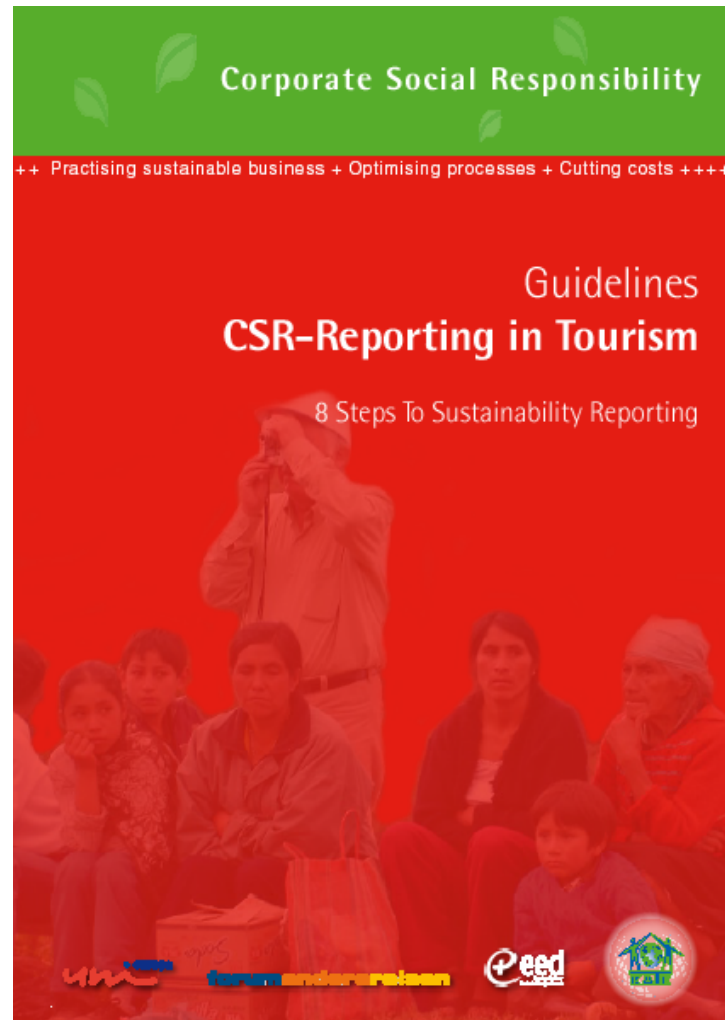
Between 40% and 50% of long-haul travellers (and 20% for the overall population) have used the Internet to **book** a service related to a holiday trip.

Conclusion:

Based on these findings, tour operators and travel agencies (in Germany as well as in destination countries) are well-advised to consider offering Fairtrade travel options.

A target group of 5 million, which is at best a *conservative* estimate, is large enough to take on a special travel segment populated with appropriate Fairtrade offerings.

It must be emphasised that the target group in question has extensive travel experience and is very critical. With this in mind, it is imperative that Fairtrade travel offerings reflect the customer expectations outlined in this study.



CSR is measurable!

What is it that remains in a country once the tourism season is over? Do tourism businesses pay their staff living wages that can support a family? Do resorts dispose of their waste in an environmentally sustainable manner? Are natural resources taken into consideration when planning a holiday product, e.g. with regard to water and energy supply? Is the food in a restaurant that offers “typical food” really sourced nationally? How much CO₂ is emitted by taking tourists to their destinations? Tourism enterprises are responsible for the conditions under which a holiday package is produced.

Sustainability reports provide information on the social, ecological and economic impacts of business operations. Tour operators can collect their data by using standardised questionnaires and check lists. The indicators cover all aspects of their business operations, from product development, internal management and customer relations to the selection of business partners in the destinations.

The guidelines are also available in German and Spanish and can be ordered at:
KATE Stuttgart: info@kate-stuttgart.org

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- Raising awareness among tourists for responsible travelling
- Consultancy for ecumenical study-tours
- Showing commitment to human rights and social standards
- Dialogue with the travel industry
- Cooperating with media and policy-makers
- Promoting alternatives in tourism, and
- Publishing the "TourismWatch" newsletter (available in German only)