



SPOTLIGHT ON: Sustainable Tourism



Photo courtesy of Hawaii Tourism Authority (HTA)

A monthly update including relevant information on travel industry trends, consumer and meetings market research, competitive intelligence, and Hawai'i's performance as a destination.

MARKET INSIGHTS UPDATE

United States | April 2019

Sustainable Tourism

It is well documented that the boom in global tourism has compounded a range of issues for destinations. As travelers become more aware of their impact on the places they visit, they are increasingly seeking out more responsible vacation experiences. Sustainable tourism – the umbrella term for nature-based tourism, eco-tourism, or cultural tourism – is growing in popularity and is expected to become mainstream over the next ten years.

Tourism is a global powerhouse, accounting for 10 percent of the global GDP. Despite challenges, tourism's annual growth remains robust and outpaces many global industries. As such, there is renewed focus on increasing sustainable travel practices to protect the world's natural and cultural resources. Sustainable tourism

is about more than just carbon footprints and climate change. It is focused on the protection of the natural environment, engaging with local culture and communities, and the sharing of economic benefits. All of those involved in tourism – including businesses, local communities, governments, and travelers – must play a role in sustainability. Governments must work to secure inclusive and sustainable growth through plans and policies that safeguard the long-term needs of local communities and guide the responsible enjoyment of a destination by visitors. Businesses and stakeholders require informed participation to promote sustainability-focused practices. And consumers must utilize the growing number of tools and resources available to assist in making responsible choices while traveling.

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Air Seat Update

Nonstop air seats from the U.S. Mainland to Hawai'i are expected to grow +6 percent in the second quarter of 2019. O'ahu and Maui are the largest recipients of the added seat capacity.

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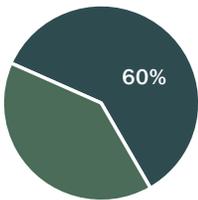


Photo courtesy of HTA

Sustainable Tourism

Sustainable Tourism by the Numbers

60% of US travelers have taken an eco- or cultural-based trip in the last 3 years.



These travelers spend more on average.

+\$600 per trip

And stay longer in-destination.



Source: Mandala Research

Choosing a Mindful Vacation

Three fifths (60%) of leisure travelers in the United States (105 million Americans) have taken an eco- or cultural-based trip in the last three years. These travelers spend significantly more on average (\$600 per trip) and stay longer in-destination (seven days compared to four). Nearly two-thirds believe they have a responsibility to ensure their travel does not harm a destination's people, environment, or economy.

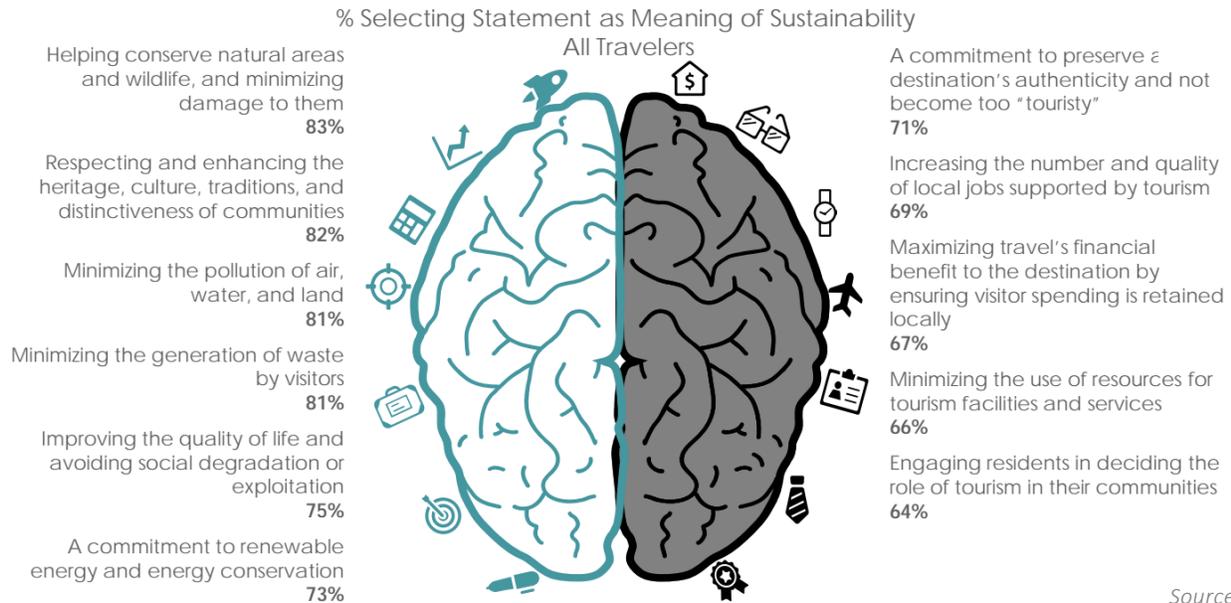
Nearly 90 percent of consumers say they would switch to a brand that supports a good cause over one that does not, given similar price and quality. According to a recent survey, more than three-quarters of travelers (78%) say that mindful travel is very or extremely important. When asked about the ways the travel industry could make it easier for people to travel sustainably, the more frequent responses included educating consumers about the basics

of sustainable travel and incorporating sustainable travel practices into existing products and services.

Three quarters of sustainable travelers perceive travel as positively impacting local residents and workers, and 71 percent feel it has a positive impact on local culture. Cultural tourism is growing at an unprecedented rate and now accounts for around 40 percent of global tourism. The millennial consumer is significantly more attracted to destinations with cultural or historical significance (76% versus 63% of the general population), access to outdoor adventure activities like diving or hiking (59% versus 45%), and local festivals and events (66% versus 49%). These travelers are not content with just being in the presence of a new culture; rather, they want to gain some understanding of it, broadening their perspective and enriching themselves.



Sustainable travel means much more to travelers than just protecting the environment



Source: Mandala Research

Responsibility of the Destination

A key pillar of sustainable tourism is protection of natural resources and the environment. According to the UN World Tourism Organization, destinations must become more rigorous in their efforts to monitor, report, and reduce resource consumption and emissions. An integrated approach to environmental sustainability is required, grounded in strategies for decoupling tourism growth from environmental degradation and excessive resource use. This must include a focus on enhancing the efficient use of resources, biodiversity conservation and environmental protection, and increasing knowledge of how environmental issues are related to tourism. One example of environmental conservation efforts by tourism-dependent economies includes the Misool Eco Resort in Indonesia, which created a 'No Take Zone' where all fishing, shark finning, and harvesting of turtle eggs and shellfish is prohibited. As a result, illegal fishing activity has been reduced by 86 percent within these zones and biomass has increased by over 250 percent. While coral reefs continue to face global threats, the eco resort's work has set a precedent for restoration and renewal.

ism is local stewardship of the land. There is a strong held belief that the people living next to a resource are the ones best suited to protect it. This means that tourism-oriented activities and businesses are developed and operated by local community members. Community-based sustainable tourism associates the success of the destination to the management practices of the communities who are directly or indirectly dependent on the location for their livelihood. A key feature of community-based sustainable tourism is that local knowledge is utilized alongside more general business models. This allows for more participation of locals at management levels and a more intimate understanding of the environment. The use of local knowledge also means easier entry into the tourism industry for locals whose jobs or livelihoods are affected by the use of their environment as a travel destination. In essence, sustainable development depends on the presence of local support. The Hawaiian Islands have long been used as an example of the nexus between biological and cultural diversity; how conservation and sustainability requires a combination of traditional wisdom and modern knowledge.

Another key tenet of sustainable tour-

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Photo courtesy of HFA



Photo courtesy of HTA



Photo courtesy of HTA

Responsibility of the Destination Continued

Finally, sustainable tourism must support the revival of traditional activities and customs, empowering local communities to promote cultural diversity and raise awareness of the value of heritage. This requires positioning cultural tourism as a tool for sustainable development, safeguarding and promoting cultural heritage, and linking tourism to living, contemporary culture and creative industries. Often times tourism encourages local pride by increasing attention paid to communities and their history. As a result, tourism can often assist with the preservation and revitalization of cultural traditions. Many destinations are improving their products and offerings in response to global trends including culinary travel, cultural travel, demand for authentic experiences, and adventure. One example of historical and cultural preservation includes a travel company that aims to improve the communities where they operate. Expediciones Sierra Norte in Oaxaca, Mexico won an award for the walking trails and community tourism it runs, which support the preservation of 2,000 plant species that serve as a storehouse for indigenous knowledge for traditional healers from the local communities.

Hawai'i's Sustainability Initiatives

The State of Hawai'i has the ambitious goal to increase policies and initiatives which

promote sustainable business practices that invest in the islands' natural and cultural resources by 2030. Hawai'i has the opportunity to become a global leader in sustainable tourism and help demonstrate the importance of balance to destinations across the globe. Businesses across Hawai'i are incorporating sustainable values and practices into their work. To support these efforts and provide accountability, the Hawai'i Ecotourism Association offers a sustainability certification for local businesses, supported by the Hawai'i Tourism Authority. Their mission is to protect Hawai'i's unique natural environment and host culture through the promotion of responsible travel and educational programs.

The Hawai'i Visitors and Convention Bureau is also working to promote sustainable tourism through the sharing of our culture and values in the Hawai'i Rooted video series. Each video tells a story unique to Hawai'i that also serves to educate travelers. Recently released stories on the *gohawaii* YouTube channel include a [family](#) that has harvested taro by hand on Kaua'i for over 100 years, a [kumu hula](#) who is the Executive Director of a Hawaiian cultural retreat on Maui, and a [chef](#) whose catering company works with local farmers on O'ahu.

Sources: HVCB analysis of Ecotourism 2017 Outlook, *The Case for Responsible Travel: Trends and Statistics 2017*, *Hawaii.gov Sustainable Tourism*



Photo courtesy of HHA

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Air Seat Update

Nonstop air seat capacity to Hawai'i from the U.S. mainland is expected to grow +6.1 percent year-over-year in the second quarter of 2019, due in large part to the launch of service by Southwest Airlines. Nearly +145,000 additional seats will be flown to Hawai'i, with more than half of those (78,000) being operated by Southwest. Other major carriers are also adding seat capacity in order to remain competitive in the market and meet demand, including Alaska Airlines (+45,600 additional seats), Hawaiian Airlines (+32,000 seats), and United Airlines (+25,400 seats).

The largest increases in seat capacity are coming from Seattle (+22,000 ad-

ditional seats), Denver (+18,000 seats), San Francisco (+13,500 seats), Long Beach (+11,500 seats), and Sacramento (+10,700 seats). The islands benefiting most from increased air seat capacity include O'ahu (+92,600 seats) and Maui (+65,600 seats). Air seat capacity to both Hilo and Kona are expected to be down in the second quarter of 2019, while air seats to Kaua'i will be flat.

With increased seat capacity comes lower fares, particularly with the launch of Southwest service. Known as the 'Southwest Effect', average airfares have been documented dropping around -15 percent when the carrier enters a new market.

Sneak Peek at Next Month



Spotlight On:
Sports Tourism