

Tourism at the Crossroads of Economic, Social and Environmental Considerations

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Abstract

The sphere of sustainable tourism involves the well-known three pillars of sustainable development i.e. the economic, social and environmental issues that need to be managed.

Whether offer and demand actually meet in that area is hard to assess. Research on actual demand is scarce, just like satisfaction surveys from those types of holiday-makers. Offer on the other hand is plentiful, although hard to come by in a specialized and small size fragmented niche market.

The words used to describe what comes more or less close to sustainable tourism are many and abused, which participates in the general confusion surrounding the concept.

Among the media used, brochures and Internet sites were studied in detail to clarify the offer side of sustainable tourism. From examples described, we draw conclusions on who are the tour-operators that come closest to a balanced view on sustainable tourism. We then draw conclusions on the role of customer choice in selecting a journey and influencing future offer.

Introduction

Observation

As editor and author of a recent book on sustainable development¹, more research was conducted on sustainable development in the hospitality business as well as so-called sustainable tourism. Observation, readings (journals and brochures), conferences led to inaccurate and biased material and views on the subject and yet widely accepted, rarely questioned ideas.

Demand for responsible, ethical or sustainable travel is also the subject of vague and conflicting statements: in spite of growing awareness, expressed concern and interest, there is less evidence that tourists have actually taken action to change their travel patterns².

A dozen brief interviews carried out among traditional travel agencies in a large French town³ confirm that they have heard little on this matter, that they do not have any brochures to hand out on this type of tourism and that, besides, there never are requests for any... Since the phase during which one seeks specialist travel agents and one peruses their brochures can only seldom cover what is understood by sustainable tourism, one must acknowledge that the offer is fragmented and confusing.

Surveys and Statistics

These are hard to come by but do exist! These surveys should come with a word of caution since 7% of the people interviewed who claim to be very interested in this type of tourism have generally never undertaken this type of trip⁴. Moreover, these surveys generally

cover one or the other type of holidays said to be sustainable (example: solidarity tourism for UNAT), which renders the assessment backed by precise figures of this market even more challenging. According to Club Aventure, this kind of tourism represents approximately 150 000 to 200 000 holidaymakers per year in France. It is estimated that 1 to 2% of the French tourists who go abroad favour this type of approach and that this figure will soon reach 5%; indeed this niche in the tourist market is growing twice as fast as the overall tourist industry⁵.

However, it has been suggested that a major constraint on the pursuit of more sustainable tourism was that tourists are not generally interested in the sustainability of the trips they take. In 2001, those travellers surveyed did not feel directly responsible for the pernicious effects of tourism: when on holidays, they do not want to hear the mention of problems. Visitor surveys and practical experience suggest that overall perceived attractiveness of a destination –among them, price- far outweigh concern for the impact of travel unless the former factors are considered equal among holiday choices.

An ill defined, misunderstood, vague, partial and rarely balanced concept

An Ill Defined Concept

Previous surveys (UNAT) have revealed that 30% of the people polled who were aware of alternative or ethical tourism associated it with fair trade; 26% with support for local populations; 17% with the notion of respect; 16% with the idea of exchanging. In this survey⁶, it is hard to tell whether one is dealing with sustainable, solidarity, responsible, ethical, fair, alternative...tourism.

Designations abound, so do their misuse, which warp the notion at stake; solidarity, eco-friendly, green, ethical, fair, responsible, alternative, sustainable, participative, native, ecotourism, community-based tourism, nature or adventure tourism, agritourism... The concept conceals too much misunderstanding; the definitions are vague and numerous, the terms employed lose their meaning through being abusively used. Lack of clarity and transparency is obvious for tourists.

Furthermore, those terms can refer to just about anything. Wadi bashing on motorbikes or private parks in Mexico, major consumers of resources, can be referred to as ecotourism since the activity takes place outdoors! Some tour operators resort to those terms for promotional purposes...

Thus, some tour operators, more conscientious in their practices, have naturally refused to share the same label as others, -counterfeiters- more lax, even opportunistic. Tour operators are waging a war against one another: « if an operator implements 1/3 of the principles, the player who will implement them 100% will not want to be lumped together with the others⁷ ».

In view of this hash of definitions, some have created their own reference such as « Sus Travel » (sus for sustainable); others simultaneously resort to several terms such as Echoway, which has decided to use the term of solidarity ecotourism to clarify in the minds of tourists the two seminal principles of its business on the social as well as on the environmental front. For its part, Lonely Planet talks of « Sustainable Travel and Responsible Tourism (START) ».

As far as we are concerned, the financial/economic characteristic, which is the third pillar of sustainable development, is still missing. Hence we have elected to retain the terms sustainable or responsible throughout the following text.

A Misunderstood Concept

A very simplistic view usually opposes the mass market and the specialist tour operators when discussing sustainable tourism. Large-scale mass market operators need to be just as

sustainable as small-scale specialist operators. The same applies to luxury vs economy establishments.

An abundance of small-scale projects are worthwhile initiatives but do not seem to be attacking the issue of sustainable tourism across a broad front. Many alternative tourism projects seem indeed to provide at best a micro-solution to a macro-problem. Mass tourism is linked to the beaten track and large groups while small ecotour operators invite small groups to be actors and not spectators of their trip. However, large operators are now becoming increasingly involved in selling sustainable trips as excursions and short add-ons to traditional package holidays. There may be tour operators selling nature or sensitive tours operators aware of impacts, supporting conservation.

Organisers of fairs and multinational firms have also joined this movement (Kuoni, Nouvelles Frontières, TUI, Club Med, Air France/KLM, Accor, Fram, Jet Tours, iDTGV, Marsans, Voyageurs du Monde, Asia, VVF, etc...). Initiatives have multiplied but these firms do not nonetheless sell « sustainable » journeys. All tourists therefore should be encouraged to be more aware of the impacts of their travelling and be more concerned about host populations. Seeking out the sustainable tourist may not be the answer to a more sustainable tourism...

A too Vague Concept

Most of the brochures and Internet sites studied do not make many more than quite vague and too similar statements for the traveller to clearly distinguish their offer from the rest.

Let us quote three as an example:

« All our holidays are based on principles of solidarity and fair tourism: long-term partnership, a concerted policy of formalization by contract, fair pay and training of our local partners, tourism considered from the viewpoint of local development, transparency, rights and duties, the duty to inform travellers and respect towards the populations » (TDS).

Or *« We work hand in hand with receptive agencies and rural tourism cultural associations. Our chart is committed to offering a different and fair type of tourism of which you will be the player: by taking part in sustainable development projects in the villages, by taking part in the various community tasks »* (Terres d'Emotions).

Or yet again *« travelling is part of an economic but also cultural, social and eco-friendly environment. By drawing our inspiration from the Charte Ethique du Voyageur, we clearly commit to a fair and responsible approach, the price of our holidays is not set at the expense of local populations... Demonstrating judgement in your choices is vital for the future of tourism that we all wish aware and responsible »* (Taïla Root).

The implications of these projects to «travel alternatively», «endow one's holidays with meaning» or «being made aware of development schemes» of the country visited are far too inadequate to position a tourist program.

A Partial and Unbalanced Concept

Too many tour operators use the term « sustainable » to describe holidays that are only « nature » or « solidarity » and too few point to the economic, administrative and financial factors of such holidays or customer satisfaction. When they do, they confine themselves to only one or two aspects of the criteria, which contain many more, as we will see in the methodology used to carry out the following research. This creates bias, a partial, one-sided and unbalanced vision of «sustainable tourism» among travellers each time the term « sustainable » is used wrongly. These unbalances can often be explained by the nature of the service providers rather than by the stands they take. These are charity organisations targeting economic development (Vision du Monde, TDS, Point Afrique), tour operators specialized in

hiking/rural society (La Balaguère, La Burle), tours operators stemming from adventure, nature or culture connoted tourism (Club Aventure, Terres d'Aventure, Saïga, Terra Incognita).

In their brochures or on their internet sites, some insist more on the environmental aspect of sustainable tourism: such is the case, for instance, of Lonely Planet (wild life watching, poaching practices, hygiene, water pollution, wilderness wanderings, water and energy, green holiday or just greenwash? transport options...); the Allibert foundation (respect for the sites, clean-up operations, waste collection, solar greenhouses, etc...). Little environmental concern can be observed at TDS (saving natural resources, waste management) at Chemins Solidaires or at Voyager Autrement where nothing has been undertaken in that area. Conversely, the media reports are often accused, notably on TV, of disdaining the human factor and of only taking nature into consideration.

On the other hand, Vision du Monde shows a strong solidarity streak termed « ethical », « sustainable » or « fair ». The financial aspects are completely linked to this. Others such as « Rencontres au bout du monde » aspire to offer « responsible, fair and solidarity » holidays; they simultaneously conjure up all the terms: development aid, solidarity, health, tourist responsibility, intercultural exchange, fair and sustainable tourism, fair and solidarity holidays, responsible and fair tourism. Only the environment is left out... For its part, La Balaguère, an activist travel agency, also favours social aspects as a member of ATR. This is the case as well of Touristsport Company, which was awarded a prize in 2007 in southern France.

All these inflexions explain why in polls⁸ 30% of interviewees who were familiar with solidarity tourism spontaneously associate it with fair trade and point to local populations as the prime beneficiaries of the business; 77% identify it with participating in building sites and voluntary help. 40% associate it with « travelling on a shoestring ». These statistics most certainly result from the distortions of the concept of sustainable tourism.

A Certain Social/Environmental Balance

The respect of environmental and human balances is one of the recurring themes at Terre d'Aventure in order to contribute to a harmonious development. Likewise at Club Aventure: dignity and respect towards the populations, protection of the environment and responsibility are key words, illustrated through many examples on the internet site and in the brochures, following in this matter in the footsteps of the responsible approach of the organisation ATR (Agir pour un Tourisme Responsable) of which it is one of the founding members. In a similar approach, Allibert anchors its values in the populations (local development aid) and the environment (restoration of the cultural patrimony, clean-up operations, protection of local resources).

Yet all these approaches lack elements of financial transparency, which are present in certain associations vying for solidarity tourism. Elements of customer satisfaction are missing and both social and environmental elements are too incomplete to earn them the term « sustainable ».

Methodology

The Outlines of the Survey

In order to confine the survey and since sustainable tourism stems from hiking and adventure holidays, we have decided to focus on the offer of France-based tour operators specialized in mountain, island and desert tours, especially but not exclusively around the Mediterranean⁹.

Since the tour operators canvassed did not generally propose such holidays -despite all the initiatives along these lines- we quickly focused on the offer of specialist tour operators

(annex 1); Indeed, they are the only ones to « design in » sustainability from project inception and to ensure that everyone involved follows the same sustainable principles. On the other hand, eco-voluntary work holidays¹⁰ were excluded. We elected to retain only those that edit genuine brochures and that are a reference in this niche (leading practitioners).

Among the media used, we focused on the brochures and internet sites of these tour operators. These indeed do not advertise much (too costly), are not very present at trade fairs other than specialized ones and word of mouth is certainly the media best adapted to their situation; their repeat business rate is high with many regulars loyal to this type of holiday¹¹; general-interest or specialist press often mentions their existence¹².

New technologies such as the internet allow small tourism organizations to communicate directly, at a low cost, with potential customers. Focusing on a market niche is one of the strengths of the web; the more agencies are specialized, the more their know-how is easy to promote since all the information given has an added value among a public whose trust is practically gained. Theme sites as a result have acquired a position of choice on the internet. We have therefore favoured this media in our survey.

The number of sustainable actions referred to was based on two sources: codes of conduct or description of the general policy properly documented of tour operators retained in the study on the one hand, precise actions described in the trips offered for sale. These being built into their programme can be considered as evidence in some of the sub-criteria section. Some others cannot be so easily verified.

Sustainability Criteria

Within the three pillars of sustainable development and sustainable tourism, many « sub-criteria » appeared to be of great importance to assess the sustainability of a holiday offer.

The environmental criteria

We have included in these criteria the protection of sites, of the wildlife and of the flora; the selective sorting and management of waste; water, energy consumption and natural resources management (solar panels, etc...), the management of pollution (CO₂, greenhouse effect), transport, the impact linked to the number of tourists, the raising of customer consciousness, the architecture best suited to the environment and the climate, the restoration of sites... The Anglo-Saxons refer to the following sub-topics: « physical integrity, biological diversity, resource efficiency, environmental purity »¹³.

The social criteria

These are numerous and include fair wages and adequate working conditions for employees, hiring and training local guides, promoting local managers towards autonomous management positions (players in their development), local purchases, fair trade, local cuisine, partnerships with families and local associations or NGOs, consideration for the local cultures, traditions and sacred forms of worship, social and cultural impacts, interaction between tourists and locals, their safety, prostitution and child labour, the behaviour of tourists that is likely to shock, sponsorship, local development projects, etc... Once again, the Anglo-Saxons refer to the following sub-topics: « social equity, visitor fulfilment, local control, community well being, cultural richness and employment quality¹³ »

The financial, administrative and economic criteria

Viability should foremost be considered, i.e. the economic profitability of a firm, of an association or of its tourist projects/products; in its absence any sustainability is ruled out. This

concerns the global financial transparency and that of specific products. The financial aspect entails a customer component: adequate prices that customers are willing to pay, customer satisfaction often linked to the price paid; percentage of the price settled invested in local development projects, integration of the holiday in the local economy and economic fallouts for the locals. Anglo-Saxons refer to « economic viability » and « local prosperity¹³ ».

Results by sustainable tourism criterion

The survey leans on the brochures and the internet sites of the tour operators selected in the methodology in the light of the criteria described in detail above. According to the detailed criteria, we note that tourists are more or less well informed and that certain elements of key criteria are completely absent from the descriptions.

The Environment (annex 2)

A number of brochures and websites portray a destination as “green” and showcase environmental achievements; those that are certified include references to the certification system in their promotional material for the tourists interested in environmentally sensitive experiences or who self-identify as green or eco-tourists.

Are most often mentioned:

- waste collection or selective sorting for instance in Toubkal in Morocco, in Ecuador (2006), in Chartreuse in France (2006), Mercantour, Indonesia, Mauritania, Tibet... to mention only a handful of the recent initiatives undertaken by Allibert.

- ethical traveller charts as practiced by Atalante. These describe in detail the responsibilities of the traveller towards waste management in the host country, the management of drinking water and everything linked to animal watching or the protection of species. Likewise at Club Aventure, all the Sahara teams comply with the «Déserts Propres» chart by clearly explaining why the desert is vulnerable to all types of pollution.

- Carrier Criteria: these are detailed extensively by TUI that chooses airline partners which have improved their fleet in accordance with environmental criteria: curbing environmental and noise pollution, considering the buyback of CO₂ emissions: major French tour operators such as Voyageurs du Monde have been offering, since 2007, its customers to compensate for the CO₂ emitted by the plane carrying them by supporting environmental projects. Airlines such as British Airways and SAS have also made such commitments; Lonely Planet in its « Climate care » proposes a carbon calculator (« what’s the real cost of your next flight? »). Allibert is a member of the « Planète gagnante » club that strives to curb the use of greenhouse effect gases (solar greenhouses, etc.). Allibert thus offers solutions of car-pooling in the Alps (2006). Atalante regulates the use of 4-wheel drives; Club Aventure selects those means of transport that are in harmony with the environment travelled.

- others schemes such as environmental diagnosis (Allibert in India), reforestation (Allibert in Kenya and Bulgaria), financial support of an NGO whose purpose is the protection of the maritime environment (La Balaguère in Senegal), clean-up operations in oases (Allibert in Mauritania). Other tour operators such as Croq’Nature were, from the outset, designed around a scheme to raise environmental awareness. In order to minimize the impact of their activities on the environment, tour operators such as Terres d’Aventure even request of their customers that they indicate any occurrence they deem contrary to the values they defend. Besides, all take part in local heritage enhancement without which they could not pursue their core business (for instance, cleaning up archaeological sites in Peru for Club Aventure).

Others yet such as Croq’Nature take into account the lifestyle of locals in the management of their holidays and choose—for instance in Mali- not to organize over two trips per week in order not to disturb the community.

· finally, saving paper concerns all those who edit bulky catalogues: whitened without resorting to chlorine in the cases of Allibert and TUI, 80% recycled in the price section (TUI) or not recycled for Chamina Voyages that favours paper originating from a forest managed sustainably in Scandinavia and that collaborates with a printer awarded the Imprim' vert label delivered by ADEME.

Social Dimension (annex 3)

On a social level, tour operators guarantee adequate working conditions for locals, pay them fairly (fair distribution of wages) to enable them to earn a decent living through their work and pass on to them their know-how. They encourage awareness among travellers of the importance of preserving cultures and sometimes form partnerships with families and local associations and agencies. They also encourage respect towards men and traditions and target responsible travellers who have understood that their behaviour and actions on site can for the host populations be both an unsettling element as well as development, interaction and friendship factors (Croq'Nature).

A usual critique of industry initiatives is that they are almost totally concerned with the environment and take little account of the social and economic climate. Specialist holidays on the other hand encourage interaction, respect towards host peoples, solidarity and development opportunities.

- *Interaction*: let us consider a few examples: Arvel (solidarity tourism - Des voyages vers l'essentiel) is among the pioneers of social tourism in France; the association aims at turning its holidays into key moments of discovery of the countries visited and of interaction with the populations. Croq'Nature (Voyages Croq'Nature and amitié Franco-Touareg) favours interaction: hence accommodation and hosts combining tradition and interaction are favoured (guest houses in Morocco..); Vacances Bleues (Vacances Bleues – Voyager autrement..): offers an alternative travel fashion based on interaction with locals and understanding of their lifestyles; La Balaguère emphasizes the importance of having a mind geared towards interaction, exchange and respect of local realities. This tour operator sells holidays that encourage contact, interaction and exchange with the local populations.

This spirit of interaction takes the form of partnerships with families and local associations. Croq'Nature, for instance, strives to work with the destitute. This tour operator has also formed a partnership with the NGO « Tara Amour », which brings to life and controls the projects and ADDS (Alliance pour un Développement Durable et la Solidarité), which manages all these projects and is active among the most destitute populations of the North of Niger. In Mauritania, Croq'Nature has formed a partnership with the charity El Velah, which manages development projects (purchase of seeds, tools and fruit trees).

As for the partnerships formed between Arvel and NGOs, these aim at building awareness among travellers of the local initiatives carried out and sponsoring them. Arvel is considered to be a support organisation, i.e. an association, which contributes to promoting and commercialising solidarity tourism holidays that it did not necessarily instigate. In Mauritania, Vacances Bleues/Voyager Autrement (VBVA) supports the association Vents du Sud that works more specifically at schooling children from rural backgrounds. For its part, La Balaguère has formed a partnership with local authorities to set up a development project and contributes financially to the implementation but not the labour, hence avoiding the trap of permanent support. Club Aventure also supports the NGO Handicap International.

- *The respect of cultures* is the guiding principle of those tour operators that target responsible travellers. Allibert commits to respecting the lifestyles of local populations and the cultural legacy of the country and goes so far as restoring it. Déserts advocates the respect of

nomadic society by favouring responsible and sustainable tourism. They perpetrate respect towards men and traditions. Club Aventure commits to respecting and supporting the cultural heritage and the dignity of the local populations as well as their customs and beliefs.

These stances are described in detail in terms of principles, then take the form of actions, as is the case with Atalante in the social chapter of its *Charte Ethique du Voyageur* (customary gestures and attitudes, pictures, invitations, gifts, medicine, alcohol consumption, prayers, rites, dress, discrepancies in living standards, life pace, etc...). The terms respect, dignity, humility, non-judgemental attitude, often crop up among specialist tour operators.

Let us seize this opportunity to pay tribute to the intelligent position of Club Aventure towards the sociocultural impacts linked to tourism by quoting them: « *What is our impact? Can our impact progressively erase the uniqueness of each people? The richness of history feeds on exchange between men. Let us not confine certain populations to open-air museums! Evolution means breathing for all peoples* ».

Likewise, Croq'Nature states, regarding Africa: « *Unless you preserve it from all foreign visits in the name of heritage conservation and entertain other ethnological fantasies, our common destiny lies very clearly in cognisant exchange*».

Initiation to local customs is a component of the spirit of encounter. In Niger, Allibert enables tourists to experiment for a while the reality of caravaneers, which constitutes an intense experience; they share with the cook the recipe of the traditional flat bread and are introduced to pack saddling to discover the ancient lifestyle of nomads who travel from well to well. The traveller takes in this manner part in the promotion of local productions.

- *Supporting and involving local populations in development*

local development aid

Most projects of this type aim at providing support in terms of health and schooling: boring a well, rebuilding a school, nutritional centre for infants, meals for school children, health centre, social drugstore, centre for the disabled, school canteen, sanitary facilities, literacy campaigns, library, latrines, orphans, the elderly, nurses, day-care centres, hospitals, etc... Others target rural communities: facilities, running of a farm, cooperative of fishermen, handicraft, grain mill, self-catering cottages, vegetable gardens, irrigation, trails and tracks, beekeepers, agroecology centre, loan of bikes, anti-salt dam, farming schools, pilot farms. Tour operators such as Club Aventure lay stress on the fact that they are not a charity organisation. Their goal is to generate resources for local economies, for instance by hiring local guides and cooks, by renting animals from peasants, by buying local produce.

pay, training and work conditions

Many commit to paying fairly all the people involved in the trade (Terdav) and more specifically local workers (Allibert). The price of Club Aventure holidays enables local populations to maintain a «normal income». Atalante provides adequate working conditions for locals and pays them « according to their true worth »; Croq'Nature guarantees a fair allotment of incomes and wages allowing all the players to earn a decent living. Algeria was the backdrop of the first Croq'Nature holiday in the Sahara. The wages of the couriers in Algeria were substantially raised to enable them to undertake personal investments.

On the training side, most guarantee the training of their local staff (La Balaguère, Terdav). Terdav programs each year training days in one or the other country visited (guiding skills; medical information – arid environment, acute altitude sickness; the environment...).

Passing on competences goes hand in hand with informing and training guides. Thus Allibert takes part in Nepal in the technical training of the altitude sherpas (action 2006), finances the initiation to French for the non-French speaking local teams in Kenya, Bolivia and Peru and sends French books to support the local organisations in charge of the training.

Thus, TDS (Tourisme et Développements Solidaires) wishes to promote controlled tourism, envisioned like a collective social deed capable of being a stumbling block for the development of the communities visited. In order to empower locals in the development, TDS is consolidating and perpetuating its Villages d'Accueil network to ensure progressive autonomy over three years (example: Burkina Faso) before expanding the concept to other destinations (Benin, Latin America).

Other tour operators such as Touristsport Company in Marseille undertake these same tasks in their very hometown, which needs it as badly as the host populations¹⁴.

- *Involvement in the restoration of cultural heritage*

For Atalante, cultural heritage anchors the history of future generations. It is necessary to both preserve and safeguard this legacy for the future (example: fresco restoration...). Attitudes to adopt for heritage preservation are also listed in the Charte Ethique du Voyageur. Allibert strives to strengthen intercultural exchanges: certain local guides are encouraged to discover the customs of another country. For several tour operators, the social aspect is deeply connected to culture, more so than to humanitarian actions (example: circus school and Boma dinner in South Africa, calligraphy class in China, visit of a weaving house-workshop in Mexico...).

One should however note that certain topics usually broached when covering the social aspects of sustainable development are not, or to a limited degree, delved into in the tourist industry. Such is the case of sex tourism and prostitution (Atalante alludes to it). Fair trade is not broached in depth; child labour is near absent from the sites and brochures. Safety is seldom dealt with. Atalante, however, describes the collective agreement on safety to which all its partners subscribe. Few tour operators provide information about employee or customer safety. Few mention the disabled in order to render tourism accessible to them whereas sustainability, of which they pride themselves, includes this notion.

The Managerial Aspect: Financial, Economic, and Administrative (annex 4)

- *Economic viability*: the sustainability criterion that underlies all others is the economic viability or profitability of all projects whatsoever. Some associations such as Croq'Nature are keen to send a business report to each traveller and to prove that, like any commercial organisation, it is compelled to be transparent and economically viable.

Allibert, together with the association Globetrekkeurs, guarantees full financial transparency! The truth is there is not a lot in the media about financial sustainability or about how well a destination is managing itself. In the course of interviews it was revealed that associations such as Croq'Nature, Rencontres au Bout du Monde, TDS or Vision du Monde are commercially holding out while sticking to their initial convictions¹⁵. One is also aware of the fact that « Voyager Autrement » is backed by a large group, « Vacances Bleues », and can thus undertake the vast task of raising consciousness. Likewise, Déserts is a brand of Comptoir des Voyages, whose economic health can easily be checked, and is also a member of APS¹⁶.

- *Transparency of financial distribution*: tour operators are more willing to publicize how the money of the holidays is distributed, one of the expectations of the travellers who indulge in this type of tourism. Many guarantee the transparency of financial distribution (Croq'Nature); others admit it is hard to know the precise breakdown of the price of a trip as well as the local fallouts (Voyager Autrement). All oppose a type of tourism in which the economic fallouts for the local populations are meagre since the middlepeople intercept the major share of the income (Vision du Monde). They promote travel that has financial benefits for the host community and operates on the principles of fair trade (Lonely Planet).

- *Development projects*: the tour operators support the local populations by backing projects or through sponsorship. Some 5 to 6% of the price of a stay is committed to their

charity partners around the globe for specific projects¹⁷, sometimes less, sometimes more¹⁸. Others provide figures under the form of percentages of the profits such as Lonely Planet or of the turnover such as Tourisme et Développements Solidaires (TDS), which makes comparing difficult. The highly detailed figures provided by some (for instance Point Afrique) do not necessarily indicate increased transparency. Some travellers are requested to take part—optionally at Vacances Bleues— by subscribing to the solidarity membership, which amounts to 15 to 25 euros. Alternatives exist such as granting loans for the creation of micro-businesses, backing facilities through refundable loans (example: Croq’Nature). The amounts can be transferred in priority to the poorest countries (Niger and Mali in the case of Croq’Nature).

Among those that provide plentiful information regarding the use of the funds collected for development, TDS and Point Afrique are noteworthy cases. For this purpose, a full report at the end of each season is sent to each participant (Croq’Nature, Chemins Solidaires...). The services provided by the local populations are also mentioned. One hence knows if a management committee and a convention manage these solidarity funds and who decides of the distribution of the funds; sometimes a commission that heads the development projects supervises the enterprises in the various host countries (example: Vision du Monde). Criteria of eligibility and a selection grid of the projects are then implemented.

The aim is to promote economic exchange and to better integrate tourist development in the local economy by establishing fair relations with the natives. The profits are reinvested in the countries visited, in the villages, at the level of local associations and cooperatives.

The most interesting approaches are those projects supported by the partners, under the form of genuine partnerships (each party contributes what it possesses); these are viable: they constitute an aid to start-ups by opposition to permanent support.

- *Fair price*: in this approach, the quality of the holiday and customer satisfaction -vital elements for sustainable tourism- are sometimes overlooked. The leisure facet of the holiday is no longer considered essential. Thus, M & D (Migrations et Développement) underlines that solidarity holidays are not synonymous with « messy holidays » and that this type of holiday is not the privilege of « seasoned backpackers »!

The customer always wants to have his money’s worth... to which Déserts retorts: « the best price is not the lowest price, but the price that enables the camel driver to maintain his business in the fairest manner possible ». The best quality/price ratio on the market therefore takes into account the fair pay of the local teams. Tour operators such as Club Aventure also clearly explain how the prices are worked out, what a « fair price » is, the calculation of their margins, the reassessment of prices from one year to the next, how « yield management » in the air transportation is taken into account, etc... As for all types of tourism, « market mechanisms need to be developed which ensure that tourists pay the full price of the products they purchase and the resources they consume. The key question is what percentage of visitors is willing to pay extra for these experiences of enhanced value.

- *Development tool*: in the long run, the locals must be in a position to control the tourist trade. At TDS, a Conseil Villageois de Développement (a village development council), elected by the inhabitants manages the profits; tourism does not challenge the initial calling of the village but simply secures additional income; it becomes a development tool. The profits generated represent approximately 20% of the turnover; the income is fully reinvested into the local economy; technical, economic and logistical support aim at implementing a long-term tourist economy and the empowerment of populations in this business (La Route des Sens). This comes in sharp contrast with a tourist activity « that would not be an end in itself but should only enable to finance sustainable development activities that benefit the community » (Vision du Monde).

Global results and limitations to the study

Results show that the social actions carried out by far outweigh the environmental and economic dimensions of tourism sustainability. 37 sub-criteria within the social field are implemented while only 26 in the environmental and 24 in the economic fields.

In terms of global results (annex 5), two tour operators stand out with the highest scores of 12 for Club Aventure and 11 for Atalante. But when you look at the break down, both have a strong emphasis on environmental and social criteria with a very limited (1) or non-existent (0) reference to the economic aspects of sustainability. On the opposite, two companies with slightly lower scores Croq'Nature (9) and Vacances Bleues (7) have a much better distribution of the 3 criteria (3-4-2 and 2-3-2); those are really balanced and deserve the label "sustainable" if only modestly. Also, it is noticeable that Vacances Bleues, a generalist tour operator, offers more sustainability criteria than its specialized subsidiary Voyager Autrement. Results also show that 8 tour operators meet the 3 criteria, 11 of them meet 1 or 2 criteria and 19 meet none of them.

The limits to this are twofold: one is that the sub-criteria are not weighted which would not be feasible to do as this depends on many external variables. The other is the lack of sufficient proof in the implementation of these sub-criteria, although the assertion is based on both codes of conduct and their implementation in specific trips. It is worth mentioning, however, that expression of dissatisfaction on the part of travellers on the tour operators' websites almost never refers to the sustainability features of the trips offered; they are most of the time the usual complaints such as cancelled or delayed flights, poor organisation, etc...

As for future studies, it would be most useful to have the feedback from clients from trips they have taken with both specialized and generalist tour operators. The internet feedback is not enough and interviews need to be conducted on all the sub-elements of each of the three sustainability criteria. This would give the prospects a better feedback and the tour operators a much more precise view of the demand side of travel which would then be compared to the results of the offer side of it.

Conclusions: confirmed hypotheses and openings

The Lack of Information

In the face of a highly fragmented offer, the traveller is at a loss and lacks information. The surveys already revealed this and the observation of the sites and brochures, as we have observed, confirms this by underlining all the vague and confusing aspects¹⁹. Information is either ineffective or insufficient and this is probably the primary reason why worthy sustainable ventures in developing countries fail to attract visitors. This is confirmed by Atalante, which, in its ethical chart writes: "there are no bad tourists, only ill-informed travellers".

Those who turn to mainstream tour operators are as poorly informed. Firstly because these have long refused to publicize their actions towards increased responsibility and solidarity (Club Med, Thomas Cook, Jet Tours, Nouvelles Frontières). For a long time and without any fuss, many, such as Terres d'Aventure, have been vying for responsible tourism. Successful companies now recognize that integrating responsible business practices into mainstream business can provide many benefits provided they are properly communicated²⁰.

A similar lack of information affects the sale of holidays on the internet²¹ whether it concerns or not responsible travel. For all holidays, the sustainable tourism strategy and policies should be clearly disseminated if a move towards more sustainable tourism is requested.

This will take time. Indeed, responsible tourism activities require travellers who are aware, informed and educated before they leave on their holiday and even before they make the decision of the choice of their holiday²².

If tourists are to support sustainable tourism enterprises, businesses need to focus attention on the provision of pre-trip information. Websites and brochures should be a useful feature to attract and enhance those experiences. They need to clearly list environmental and social credentials to assist visitors in identifying responsible options.

To achieve this, the information must be accurate, objective, clear and not in the least misleading. The lack of independent, incisive, detailed information regarding responsible tourism is disappointing. The discerning traveller can have a hard time sifting tourism's wheat from the chaff to find genuine sustainable projects.

Partial, Unbalanced Information

Often, it is only by going to a destination that the traveller discovers that what was marketed as sustainable tourism is missing several key pillars of the definition.

Indeed, debating sustainable tourism implies considering its three pillars, financial, environmental and social. However one must manage its interfaces: one mentions too seldom the principles to which it refers: transversality, multi-disciplinarity, convergence, reconciliation, consistency, globality, integration, balance, harmony. It implies resorting to two other groups of key words: the notions of arbitration, choice and compromise on the one hand; the notions of progress, approach, process, progression, and method on the other hand²³.

In all the brochures and on all the sites examined, one of the pillars –environmental or social- outweighs the other. As for the financial pillar, it is often overlooked. When both the environmental and social pillars are present and balanced, the designation solidarity ecotourism may perhaps apply. A type of tourism that is termed responsible may include all three pillars, like tourism said to be « sustainable ». The use of these terms deserves to be monitored.

Besides, and despite its simplistic name, the definition provided by the International Ecotourism Society (TIES) for ecotourism corresponds quite accurately to the criteria of sustainability; it is elaborated in detail in seven principles that accompany it and that have been acknowledged by the Quebec Declaration on Ecotourism in 2002²⁴. Let us also add that, in its goals, the Global Ecotourism Conference in 2007 lays stress on the financial aspect of sustainability: « ensuring that travel and tourism remains a viable sector of the global economy and that it is environmentally, as well as financially, sustainable »²⁵.

We deemed certain brochures and sites to be quite balanced in their contents. Let us quote, for instance, those of Lonely Planet, Chamina Voyages, Allibert²⁶ and Ecotours²⁷.

A Type of Tourism that Meets a Demand

The question today is how “to bridge the gap between the rapidly increasing number of tourists interested in authentic responsible tourism and small scale community-based tourism ventures that are failing because tourists and the industry are unaware that they exist²⁸”.

Also, the idea is also to act for all types of tourism, whether mass or not, to become responsible and sustainable! Thus, how can one promote and render the sustainability of tourism accessible to all?

How can one generate trust so that the traveller interested by responsible tourism distinguishes between a tokenistic fraudulent or fake approach taken by many tourism organizations and holiday packages genuinely more responsible or sustainable than the conventional ones? Those for whom commitment is genuine must place it within the realm of the largest number of people possible through all the usual media, notably their brochures and internet sites, including awards, certifications and labels. Pressure for it from tourists will be

equally important for sustainable tourism to develop. Consumer education is in that respect vital to foster awareness and boost demand. In the future, the offer of tour operators is likely to be shaped by tourist demand, government regulation –which they try to avoid- or both.

The Solutions

- *Among specialized tour operators*, this is achieved through the management of customer relationship or by means of seminal decreed principles or both simultaneously.

The internet is the customer's favourite tool, as we have observed, and such is also the case of tour operators in terms of communication, commercialisation and promotion as far as the sustainable tourism niche is concerned: consciousness is raised among consumers, environmental awareness is focused on, possibility of pooling and of collaborating. The internet allows small tourism organizations to communicate directly, at low cost, with prospects just like multinational corporations do; together they can compose an adequate offer. They can also post the comments of customers who share their opinion; this creates a space in which to interact, builds loyalty and reassures customers.

Beyond the holidays, those customers who have joined can be invited to dinner-encounters or to presentations, as is the case, for instance, with the Arvel association or Club Aventure, and receive newsletters informing them of all the events concerning their tourist niche. Besides, small, locally owned enterprises have set up marketing consortia where resources are pooled to compete with larger organizations and to make more impact in the market.

The constitution of a network generally takes place around the topics of the formalization and the harmonization of the shared values that drive these tourist practitioners and their professional practices. This led to the creation of ATR (Agir pour un Tourisme Responsable), certainly the most developed network to date. Networks develop around charts, codes of conduct and labels. The ATR label, controlled by Afaq Afnor, evolves towards an economic logic by making both human and environmental commitments. However, the financial aspects linked to the viability of the projects are lacking. One therefore understands why many subscribers and future applicants of the label do not position themselves regarding financial criteria. Or perhaps they have elected not to publicize these among their customers, who however in this type of network are probably interested by the management of such projects. Do they deem it unnecessary to publicize these financial aspects to the customers? This would indicate for certain a measure of contempt, in any case certainly not a « sustainable » attitude!

Thus, thanks to the creation of a network, these tour operators coalesce, publish common brochures or rally around shared causes. Other networks exist around the world such as Tour Operators' Initiative. Others yet are coming to life: STI (Sustainable Travel International) and NSF International just launched a new global Sustainable Tourism Eco-certification Program called STEP²⁹. But, the need for official standards and labelling systems is strong in order to help consumers decide to purchase more sustainable tourism products.

- *Among mainstream tour operators*

Some, since they are subject to specific rules –for instance if they are listed on the stock exchange – have triple bottom line reporting whereby social and environmental results are measured and reported next to financial results; it contributes guarantees in terms of sustainable development; yet more often than not, these are not known to their customers. But, for those active in embracing sustainability principles and that are not specialist operators, few have applied them in the design of tour programs. Yet, for sustainable tourism to truly take off, the big players of the trade would have in turn to indicate an interest. Moreover, the Initiative des Tour Opérateurs (TOI) includes, admittedly, large corporations including Accor, Exodus et Thomas Cook as well as institutional organisations (UNESCO, PNUE, OMT) but their

commitment to integrating sustainable development in their professional practices does not carry any obligation. Pressure from online travel agencies such as responsibletravel.com or Tourism Concern targeting big travel agencies succeeded in having them publish responsible business policies³⁰. Business tour operators are also joining ethical associations³¹ and even encourage their customers to finance projects...

Yet why don't certain classical tour operator networks accommodate in their catalogues the offer of associations or NGOs? Beyond simple activism, these small structures must indeed implement real commercialisation tools. UNAT does not seem keen on the idea that sustainable holidays may be resold through large channels, less inclined to take the time to sell these³². Isolated agreements do indeed exist, such as the proposition of Clio, a specialist of cultural tours, which after three decades of direct selling has offered agencies the possibility to distribute their products.

- *The trend towards "sustainable travel lite"*. This –as well as working with travel media– would prove to be a useful way of facilitating market access for businesses too small to achieve market penetration on their own. Would they run the risk of losing their soul in the process? The trend towards "sustainable travel lite" seems to be spreading to all operators since the leisure dimension remains vital for all and both specialized and generalist tour operators need to meet the current market reality. If both offers will tend to juxtapose in the future, both also will have to deserve the terms responsible and sustainable in all their acceptations.

References

¹ Maud Tixier, *Communicating on sustainable development*, Editions d'Organisation, Paris, April 2005

² Maud Tixier, « Flawed, partial, simplistic, baseless, biased or unrealistic notions of sustainable development », *Ehlite Magazine*, issue 16, Marh 2007

³ Aix-en-Provence/Marseille, southern France-PACA : Provence-Alpes, Côte d'Azur, summer 2006, « *I do not understand what you mean* » was the most positive answer obtained

⁴ UNAT survey (Union Nationale des Associations de Tourisme, Les Echos, March 17th 2005) carried out by Sofrès, ordered by the French Ministry of Foreign Affairs in March 2005. Those who feel concerned stem overwhelmingly from privileged socio-professional backgrounds, are over 34, have a higher education and live in the Paris basin. This confirms a survey by the UNWTO carried out in Europe, Canada and the USA in 2003: the « ethical » tourist is described as being a city-dweller, single, aged 35 to 55, from a privileged socio-professional group. Germans and Britons are more receptive. For Croq'Nature, these holidaymakers are in 80% of cases the same as organic enthusiasts (journalist convention, Paris, September 2006).

⁵ Yves Godeau, founder of Club Aventure, *Les Echos* dated 11/07/03 and 17/03/05 : « le tourisme solidaire, en vogue mais vague ». Martine Robert.

⁶ UNAT, March 2005

⁷ Tourisme solidaire, *Petit Futé*, 2006

⁸ UNAT, March 2005

⁹ The Quebec Declaration on Ecotourism (2002) states that "ecotourism lends itself better to independent travellers as well as to organized tours for small size groups".

Website at: <http://www.world-tourism.org/sustainable/IYE/quebec/index.htm>

¹⁰ Examples of eco-voluntary tour operators: A pas de Loup, Echoway and Saïga (part of activities)

¹¹ Word of mouth: often around 30-40% and loyalty rate ≈ 30% for instance at Croq'Nature

¹² For instance *L'Echo Touristique*, October 20th 2006, « Des TO qui aiment l'authenticité », p 37
Les Echos, March 2005, « Tourisme durable: peut mieux faire? », *Greenhotelier*, January 2006, Finance and Sustainable Tourism, p. 11

¹³ UNEP, 2005, «The relationship between the 12 aims and pillars of sustainability», *Making Tourism more sustainable*

¹⁴ Awarded in 2007 the regional trophy for CSR for the southern France region

¹⁵ Tourmag.com/III-Sandrine-Bot-Nos-voyageurs-veulent-savoir-ce-que-nous-faisons-de-leur-argent-al7707.html

¹⁶ Association Professionnelle de Solidarité du Tourisme, a guarantee in case of financial bankruptcy of the travel agency

¹⁷ Croq'Nature, Chemins Solidaires, la Route des Sens, Migrations et Développement, Alternative Travels, etc...

¹⁸ For instance, Vision du Monde 3% expect in Mali 7% (but other financing sources add on to these), Case d'Alidou 15%, Arvel 2%

¹⁹ Refer to *Les Echos*, 17/03/05, The lack of general information is mentioned by 29.4% of the people interested in the concept as well as the lack of relevant information on alternative forms of tourism

²⁰ An example: conclusions of the first regional conference for Africa, Tourcom: Africa & Americas, Mali 2006

²¹ *Les Echos*, 20/12/06, p. 34, « La DGCCRF critique une mauvaise information »

²² Respect of the desert, Atalante: « gathering information before departure is the first step in the dunes and the desert », web site: www.atalante.fr

²³ Maud Tixier, Communicating on a vague concept, *Communicating on sustainable development*, Editions d'Organisation, Paris, 2005

²⁴ The definition of ecotourism promoted by The International Ecotourism Society is “responsible travel to natural areas that conserves the environment and sustains the well-being of local people”. The Quebec Declaration on Ecotourism (2002) recognizes that ecotourism embraces the following specific principles which distinguish it from the wider concept of sustainable tourism: Contributes actively to the conservation of natural and cultural heritage ; Includes local and indigenous communities in its planning, development and operation, and contributes to their well-being, ; Interprets the natural and cultural heritage of the destination to visitors ; Lends itself better to independent travellers, as well as to organized tours for small size groups.

There are other definitions of ecotourism in which the importance of the environment outweighs the social aspect. The definition of the International Union for the Conservation of Nature and Natural Resources (IUCN):

Ecotourism: responsible travel on the environmental level and visit of relatively uncorrupted natural habitats in order to appreciate nature -as well as all past or present cultural events observable from these habitats- encouraging conservation, with a very limited negative impact and reliant on an active involvement of local populations with the intention of creating benefits. Quoted from Echoway, solidarity ecotourism. www.echoway.org

²⁵ In May 2007 in Oslo, Norway, a conference that is held every five years. www.ecotourismglobalconference.org

²⁶ Allibert: « A responsible approach; populations and the environment: deep-rooted values »

²⁷ As selected by *le Petit Futé* : « Tourisme solidaire », p. 53, 2006

²⁸ Justin Francis: responsibletravel.com (RT), cofounder and MD at the time it joined forces with Conservation International (CI)

²⁹ CRC News, February 2007 and www.ecocertification.org ; www.nsf.org ; www.sustainabletravelinternational.org

³⁰ See action by Anita Roddick, 2004, site: responsibletravel.com

³¹ Example: Public System Voyages and Sagarmantha with TDF (Tourism for Development)

³² Sandrine Bot, 12/02/07, Tourmag.com

ANNEX 1

List of tour operators with brochures and websites used in the study

Arvel	Migrations et Développement (M&D)
Allibert	Nouvelles Frontières
Alternative Travels	Point Afrique
Atalante	Rencontres au Bout du Monde
ATR	Saïga
Chamina Voyages	Sus Travel
Chemins Solidaires	Sustainable Travel International (STI)
Clio	Taïla Root
Club Aventure	TDS (Tourisme et Développement Solidaires)
Club Med	Terra Incognita
Croq'Nature	Terres d'Emotions
Déserts	Terres d'Aventure
Echoway	Thomas Cook
Fram	Tour Operators' Initiative
Kuoni	Touristsport Cy
La Balaguère	TUI
La Burle	Vacances Bleues
La Case d'Alidou	VDS (Voyages, Développement, Solidarité)
La Route des Sens	Vision du Monde
Lonely Planet	Voyager Autrement
Marsans	

ANNEX 2

Results : environmental criteria

	1. percentage site restoration	2. positive cultural impact	3. fauna/flora site protection	4. waste management	5. solar panels. energy	6. Co2	7. clean transport	8. carrying capacity	9. architecture	10. client/employee involvement	11. water management	12. recycled paper	total
Arvel													0
Allibert	■				■	■	■					■	5
Alternative Travels													0
Atalante			■	■		■	■				■	■	6
ATR													0
Chamina Voyages												■	1
Chemins Solidaires													0
Clio													0
Club Aventure		■	■		■	■					■		5
Club Med													0
Croq'Nature								■			■		2
Déserts													0
Echoway													0
Fram													0
Kuoni													0
La Balaguère	■												1
La Burle													0
La Case d'Alidou													0
La Route des Sens													0
Lonely Planet						■	■						2
Marsans													0
Migrations&Dvpt (M&D)													0
Nouvelles Frontières													0
Point Afrique													0
Rencontres au Bout du Monde													0
Saïga													0
Sus Travel													0
Sustainable Travel International													0
Taïla Root													0
TDS (Tourisme et Dvpt Solidaires)													0
Terra Incognita													0
Terres d'Emotions													0
Terres d'Aventure											■		1
Thomas Cook													0
Tour Operators' Initiative													0
Touristsport Cy													0
TUI												■	1
Vacances Bleues						■	■						2
VDS (Voyages, Dvpt, Solidarité)													0
Vision du Monde													0
Voyager Autrement													0
total	2	1	1	3	0	5	5	1	0	4	1	3	26

ANNEX 3

results: social criteria

	1. fair wages/working conditions	2. local recruitment	3. promoting locals to management	4. local supplies	5. client/employee safety	6. no child labour	7. fair trade	8. positive social impact	9. local cuisine	10. encounter with locals	11. respect for local cultures	12. avoid hurting	13. prostitution	14. lawful conduct	15. management appropriation by locals	16. family/associations partnership	total	
Arvel																	2	
Atlibert	■			■													4	
Alternative Travels																	1	
Atalante						■						■	■	■	■		5	
ATR																	0	
Chamina Voyages																	0	
Chemins Solidaires																	0	
Clio																	0	
Club Aventure	■	■			■											■	6	
Club Med																	0	
Croq'Nature	■																4	
Déserts																	1	
Echoway																	0	
Fram																	0	
Kuoni																	0	
La Palaguère				■												■	4	
La Burle																	0	
La Case d'Alidou																	0	
La Route des Sens																	0	
Lonely Planet																	0	
Marsans																	0	
Migrations et Développement																	0	
Nouvelles Frontières																	0	
Point Afrique																	0	
Rencontres au Bout du Monde																	0	
Saïga																	0	
Sus Travel																	0	
Sustainable Travel International																	0	
Taila Root																	0	
TDS																■	1	
Terra Incognita																	0	
Terres d'Emotions																	0	
Terres d'Aventure	■		■														2	
Thomas Cook																	0	
TourOperators Initiative																	0	
Tounsport Cy	■																1	
TUI																	0	
Vacances Bleues											■	■				■	3	
VDS																	0	
Vision du Monde																	0	
Voyager Autrement											■	■				■	3	
total	5	1	3	1	1	0	0	0	0	0	6	9	1	1	1	2	6	37

ANNEX 4

Results: economic criteria

	a. clients' readiness to pay/fair price	b. internet client satisfaction	c. percentage repeat business/client satisfaction	d. percentage local projects	e. locals economic benefit	f. profitable/locals autonomy	g. transparency	h. local economy integration	total
Arvel									0
Allibert									0
Alternative Travels									0
Atalante									0
ATR									0
Chamina Voyages									0
Chemins Solidaires									1
Clio									0
Club Aventure									1
Club Med									0
Croq'Nature									3
Déserts									2
Echoway									0
Fram									0
Kuoni									0
La Balaguère									0
La Burle									0
La Case d'Alidou									0
La Route des Sens									2
Lonely Planet									2
Marsans									0
Migrations et Développement (M&D)									1
Nouvelles Frontières									0
Point Afrique									1
Rencontres au Bout du Monde									1
Saïga									0
Sus Travel									0
Sustainable Travel International									0
Taila Root									0
TDS (Tourisme et Développement Solidaires)									4
Terra Incognita									0
Terres d'Emotions									0
Terres d'Aventure									0
Thomas Cook									0
Tour Operators' Initiative									0
Touristsport Cy									0
TUI									0
Vacances Bleues									2
VDS (Voyages, Développement, Solidarité)									0
Vision du Monde									3
voyager Autrement									1
total	4	1	0	3	3	8	4	1	24

ANNEX 5

Global results actions led related to the three pillars of sustainable tourism

	ENVIRONMENTAL	SOCIAL	ECONOMIC	TOTAL SCORE	HIGHERS	MSCORES		ENVIRONMENTAL	SOCIAL	ECONOMIC	TOTAL SCORE	HIGHERS	MSCORES	
Arvel	0	2	0	2			Nouvelles Frontières	0	0	0	0			
Allibert	5	4	0	9	•		Point Afrique	0	0	1	1			
Alternative Travels	0	1	0	1			Rencontres au Bout du Monde	0	0	1	1			
Atalante	6	5	0	11	•		Saïga	0	0	0	0			
ATR	0	0	0	0			Sus Travel	0	0	0	0			
Chamina Voyages	1	0	0	1			Sustainable Travel International	0	0	0	0			
Chemins Solidaires	0	0	1	1			Taila Root	0	0	0	0			
Clio	0	0	0	0			TDS (Tourism et Dvpt Solidaires)	0	1	4	5			
Club Aventure	5	6	1	12	•		Terra Incognita	0	0	0	0			
Club Med	0	0	0	0			Terres d'Emotions	0	0	0	0			
Greg Nature	2	4	3	9	•	X	Terres d'Aventure	1	2	0	3			
Déserts	0	1	2	3			Thomas Cook	0	0	0	0			
Echouway	0	0	0	0			Tour Operators' Initiative	0	0	0	0			
Fram	0	0	0	0			Touristsport Cy	0	1	0	1			
Kuoni	0	0	0	0			TUI	1	0	0	1			
La Balaguère	1	4	0	5			Vacances Bleues	2	3	2	7		X	
La Burle	0	0	0	0			VDS (Voyage, Dvpt, Solidarité)	0	0	0	0			
La Case d'Alidou	0	0	0	0			Vision du Monde	0	0	3	3			
La Route des Sens	0	0	2	2			Voyager Autrement	0	3	1	4			
Lonely Planet	2	2	0	4										
Marsans	0	0	0	0										
Migrations&Dvpt (M&D)	0	0	1	1										

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