



Sustainable Tourism in Enterprises, Parks and Protected Areas



THE BUSINESS CASE FOR SUSTAINABILITY

Evidence that tourism businesses in protected areas perform best when they also implement sustainability actions

SUSTAINABLE TOURISM IN ENTERPRISES, PARKS AND PROTECTED AREAS

This is a publication from the EU project Sustainable Tourism Enterprises in Parks and Protected Areas (STEPPA) which is funded by the European Union's grant programme: Knowledge networks for the competitiveness and sustainability of European Tourism.

STEPPA's main aim is to promote and strengthen the cooperation between the different experiences and certification initiatives for small and micro tourism enterprises working with protected areas. This is done through the sharing, levelling and enhancement of their sustainability practices and criteria, and strengthening their competitiveness through the development of working partnerships between these initiatives and specialized research and support centres for tourism sustainability. The work and research of the project is focused on EUROPARC's European Charter for Sustainable Tourism in Protected Areas.

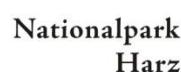
The project involves ten partners from seven countries: University of Eastern Finland (Finland), Leeds Metropolitan University (UK), EUROPARC Federation (Germany), Consejería de Medio Ambiente (Andalucía, Spain), Parco Naturale Alpi Marittime (Italy), Parco Naturale Adamello Brenta (Italy), State Nature Conservancy of Slovak Republic (Slovak Republic), Latvian Country Holidays (Latvia), Nationalparkverwaltung Harz (Germany), and CoaST (UK).

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Summary

Sustainability and business performance are related, and they both have a positive impact on each other, according to this survey of nearly 900 tourism and hospitality businesses from 59 European protected areas. The green lifestyle group of businesses is dominant- for most businesses, sustainability actions are taken for altruistic reasons as part of lifestyle choices. The green entrepreneur group is smaller, with less than 20% of businesses having a profile of reasons and actions that suggest sustainability is seen as a business asset or a vehicle for competitive advantage.

SMALL AND VULNERABLE BUSINESSES IN EUROPEAN PROTECTED AREAS

The businesses responding are small and relatively young firms, with well qualified managers with a mixture of economic and lifestyle reasons for being in business. Less than 25% of them think their business health is good, and 35% think it has worsened in the last two years due to the financial crisis. Customers spend 50 Euros in high season and 38 Euros in low season on average, with 4.4 months with more than 50% occupancy. Seasonality is a serious problem for most businesses. The poor occupancy and high price variation suggests these businesses aren't financially healthy, and aren't commercially attractive propositions.

WE CLAIM TO BE SUSTAINABLE IN GENERAL TERMS BUT FIND IT HARDER TO SHOW CONCRETE EXAMPLES

Businesses claim to undertake a large number of sustainability actions. Economically, most businesses claim to pay salaries above industry average and to choose suppliers that contribute to local development. Socially, above all they suggest they support local community conservation. It is the environmental actions that are most typical, with more than 50% of businesses taking at least all five actions: using environmentally friendly products, encouraging customers to be environmentally friendly in the property and in nature, energy and water saving activities and waste recycling. The actions reported most commonly are generic and quite vague, whereas when businesses are asked specific and concrete actions they are less likely to implement them. This suggests an overall willingness that will not always translate into action.

LARGER BUSINESSES REPORT MORE SUSTAINABILITY PRACTICES

Size matters. The larger businesses report implementing more energy and water actions and choosing local staff. Non-family businesses implement more actions (only recycling is more typical in family businesses). Belonging to a chain or brand is related to using environmentally friendly products and suppliers, encouraging customers to be environmentally friendly and a number of social measures. 4-5 star properties report more actions. More qualified managers also implement more sustainability measures that both increase income, savings and costs/investment.

The main reasons for acting sustainably are altruistic, with cost savings, marketing/image benefits, and customer demand raking lower. The reasons to not act more are, predictably, lack of money and

time, although learning something new by implementing sustainability actions was considered important by more than 50%, and knowing they can succeed before starting by 64%.

SUSTAINABILITY AND FINANCIAL HEALTH ARE RELATED

Sustainability does not have a positive impact on the difference in prices between high and low season, or the business seasonality. However there is a positive relation between taking more sustainability actions, and having both a better business performance and a perception of things having improved in the last two years.

Businesses that take more sustainability measures believe their business has benefitted from it in, and are more satisfied with their financial performance than the average. There is positive relationship between the environmental, social and total sustainability measures (but not with economic sustainability measures) and the businesses' current financial situation and its evolution in the last two years. Businesses with a better financial health also introducing environmental eco-savings practices as energy and water savings and waste recycling, but also other altruistic environmental practices. The businesses that perceive they have financially improved in the last two years are also more likely to use renewable energies, collaborate with social projects, encourage people of all abilities to apply for jobs and encourage customers to contribute to social initiatives. There is no significant positive relationship between the financial performance and any other social or economic sustainability variables. There is a negative relationship between financial performance and encouraging respect for the culture of the area.

BUSINESSES SHOULD LEARN TO COMMUNICATE SUSTAINABILITY

Businesses are shy to communicate their sustainability messages. They report only partial benefits from their parks having Charter status, belonging to a Charter network, or having a sustainability certification programme. However, they are also making limited use of their sustainability actions to attract customers- most businesses do not tell customers until they are in the property, and while 50% claim to tell them in the website, an analysis of this information shows the text is poor and does not encourage buying the products/services offered.

IMPLICATIONS FOR PROTECTED AREA MANAGERS

1. Promoting the business case of sustainability to businesses is not likely to work as much as focusing on the altruistic reasons.
2. If many of the businesses undertaking sustainability actions do it for lifestyle reasons, it will be difficult to promote any change of behaviour specially more formalised sustainability management (even if it increases profits).



3. Savings from energy, water and waste management should be promoted first, to help these businesses make savings. Help them identify the savings to then use these as a budget for other sustainability actions that will inevitably increase costs.
4. All businesses need help to understand which sustainability actions can be presented as part of quality, and to learn how and when to communicate these.

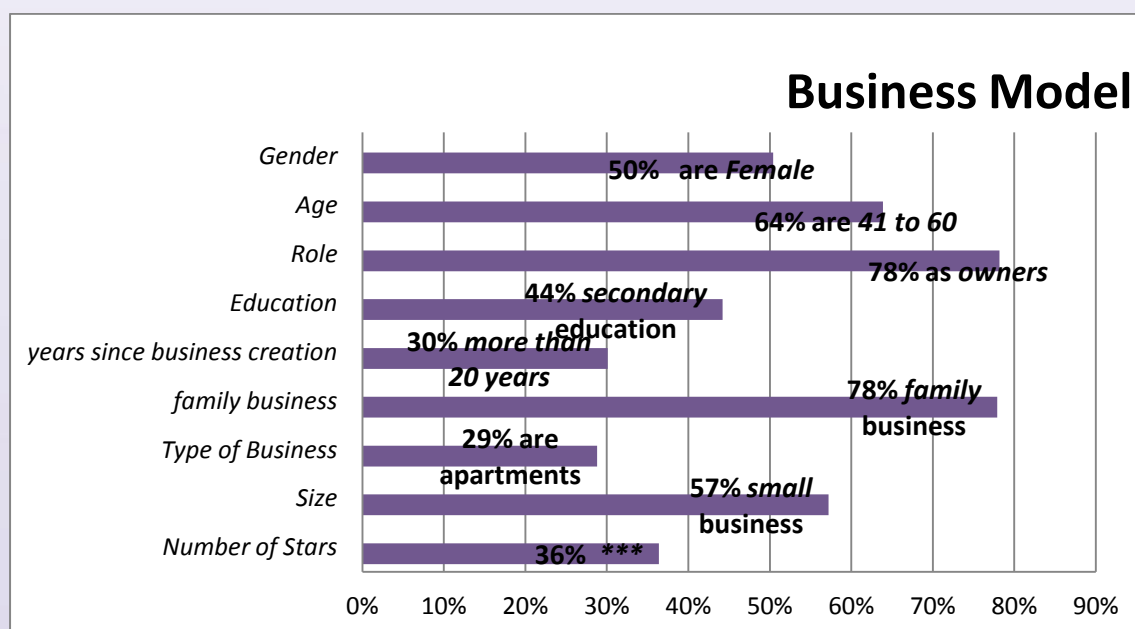


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Meet the tourism industry of Europe's protected areas

The typical tourism business in Europe's protected areas is a family business with less than 5 staff (80%), not affiliated to a brand (83%), run by their owner (78%), who is middle-aged (64% between 41 and 60 years) and well-trained (44% has secondary education and 35% a university degree). 90% of the businesses that responded say they are small (57%) or medium (33%) sized. Businesses are relatively young: 45% of them have been operating less than 10 years.



GRAPH 1: BUSINESS MODEL

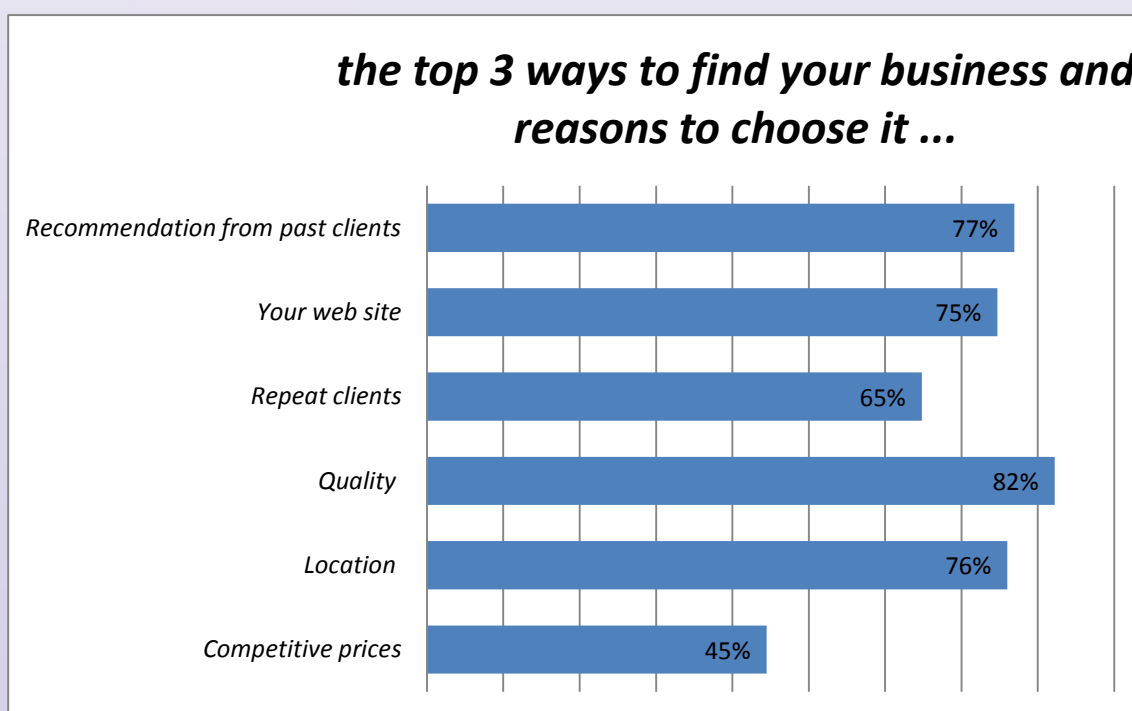
The types of business vary, the most typical business being apartments/self-catering accommodation (29%), followed by hotels (20%) and guesthouses (14%) restaurants (14%), activity providers (13%), camping (7%) and other minor activities. Similarly, the category of these establishments would also be consistent with the European average, with 36% three star and 32% four-star businesses (10% one star, 18% two stars and 8% five stars), see graph 1.

How is business?

62% of respondents say that the establishment's financial health is about average, 24% is good and only 14% say it is poor. However, in relation to the current crisis, 35% say that this situation has worsened over the past two years, while 40% say that is the same and 23% that it has improved. 40% of businesses have over 50% occupancy throughout the year, and nearly 35% of them have less than 30%. The average is for 4.4 months in the year to have more than 50% occupancy, with an average spending per customer per day of 50 Euros in high season and 38 Euros in low season.

Low occupancy is due to weekend bookings (46%), which leaves weekdays unoccupied, with 4-7 day bookings being also important (40%). Families (45%) and couples (28%) represent the typical group compositions.

Businesses claim that quality (82%) is the key reason why their clients choose them, and not price (45%). The recommendation from past clients and the information on the businesses' website are believed to be very important, but not searching the internet or social media (22%), and even less advertising (13%). These businesses rely heavily on repeat clients (65%) (See graph 2).

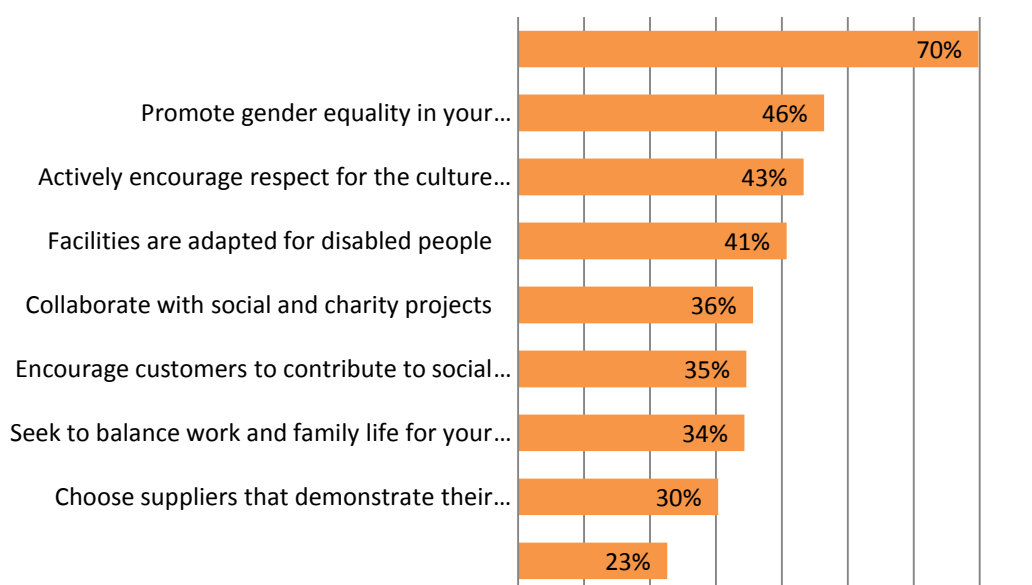


GRAPH 2: REASONS AND WAYS TO FIND A BUSINESS

Plenty of sustainability practices

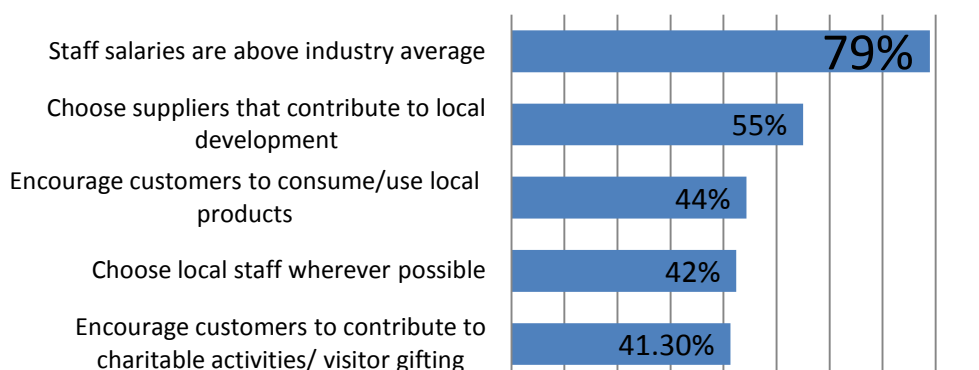
These businesses stand out in the number of sustainability practices implemented. The actions reported most often are those that are generic, so the business could mean many things by it and doesn't have to commit. For example, businesses say that they encourage customers to be environmentally friendly in the property (68%), support to local community development and heritage conservation (70%) or encourage customers to consume/use local products (80%). But are much less likely to say they choose environmentally friendly suppliers (44%), promoting gender equality in the employment practices (47%) or choose local staff wherever possible (55%). The highest percentages of actions are environmental, and many of these lead to financial savings (energy and water saving activities) or are fairly standard in most destinations (recycling). (See graphs 3, 4, 5)

Less than 50% of respondents promote *gender equality*



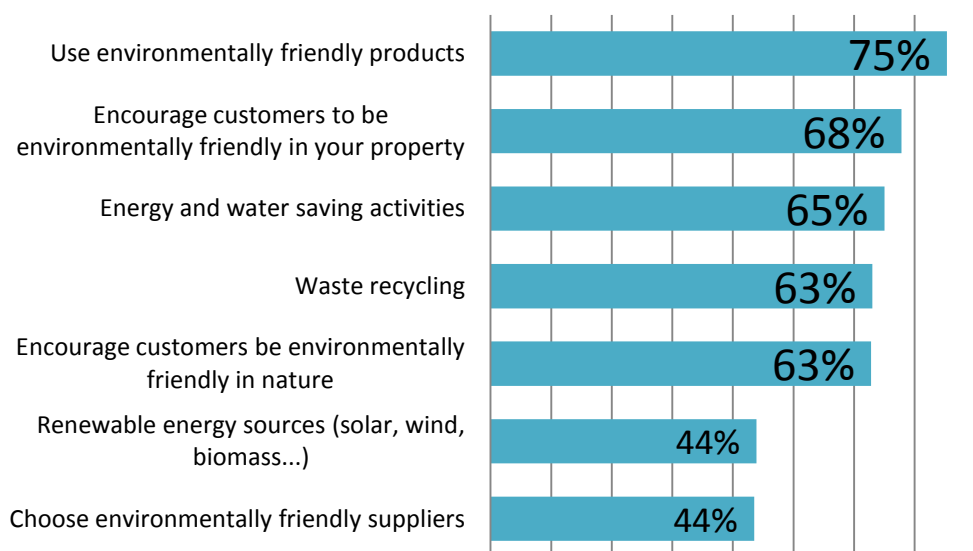
GRAPH 3: SOCIAL MEASURES

More than 78% concerned about staff salaries



GRAPH 4: ECONOMIC MEASURES

More than 50% practice at least 4 environmental measures...



GRAPH 5: ENVIRONMENTAL MEASURES

Who acts more sustainably?

Older owners/managers are considerably more likely to implement environmental sustainability actions such as energy and water savings and waste recycling but also with the fact of encouraging customers to contribute to social activities and choose suppliers that contribute to local development. Younger respondents are more likely to introduce socio-economic actions, such as staff salaries above the industry average, and promoting gender equality, and also using renewable energy sources. There is no significant difference in the total number of sustainability actions taken by age, but older respondents introduce actions that lead to greater income or savings.

More qualified respondents undertake more sustainability actions, both increasing income and costs, such as energy and water savings, use environmentally friendly products, choose environmentally friendly suppliers, collaborate with social projects, promote gender equality, encourage people of all abilities to apply for jobs, seek to balance work and family, choose responsible suppliers, encourage customers to contribute to social initiatives and choose local staff.

Newer businesses are more likely to encourage respect for culture. Older businesses instead are more likely to choose local staff. The establishments older than 20 years are most likely to have staff salaries above the industry average.

Belonging to a brand or chain is positively (and significantly) related with undertaking more sustainability practices than non-affiliated businesses, and specific practices as introducing renewable energy sources, use environmentally friendly products, and supplier and encourage customers to be environmentally friendly in nature and some social measures such as collaborating with social and charity projects, supporting local community development, having adapted facilities, promoting gender equality in your employment practices, encouraging people of all abilities to apply for jobs, seeking to balance work and family and encouraging customers to contribute to charitable activities.

Non-family businesses implement considerably more sustainability actions (only recycling is more typical in family than non-family businesses), such as to encourage customers be environmentally friendly in nature, collaborate with social and charity projects, having adapted facilities, promote gender equality in your employment practices, encourage people of all abilities to apply for jobs, seek to balance work and family life for your staff, have staff salaries that are above industry average and also encourage customers to contribute to charitable activities.

Size impacts on sustainability actions, with larger businesses implementing more actions than smaller ones. The larger businesses are more likely to implement energy and water savings activities and choose local staff.

Mountain huts, restaurants and activity providers reported the greatest number of activities implemented. The statistics suggest different types of business are more likely to implement certain actions:

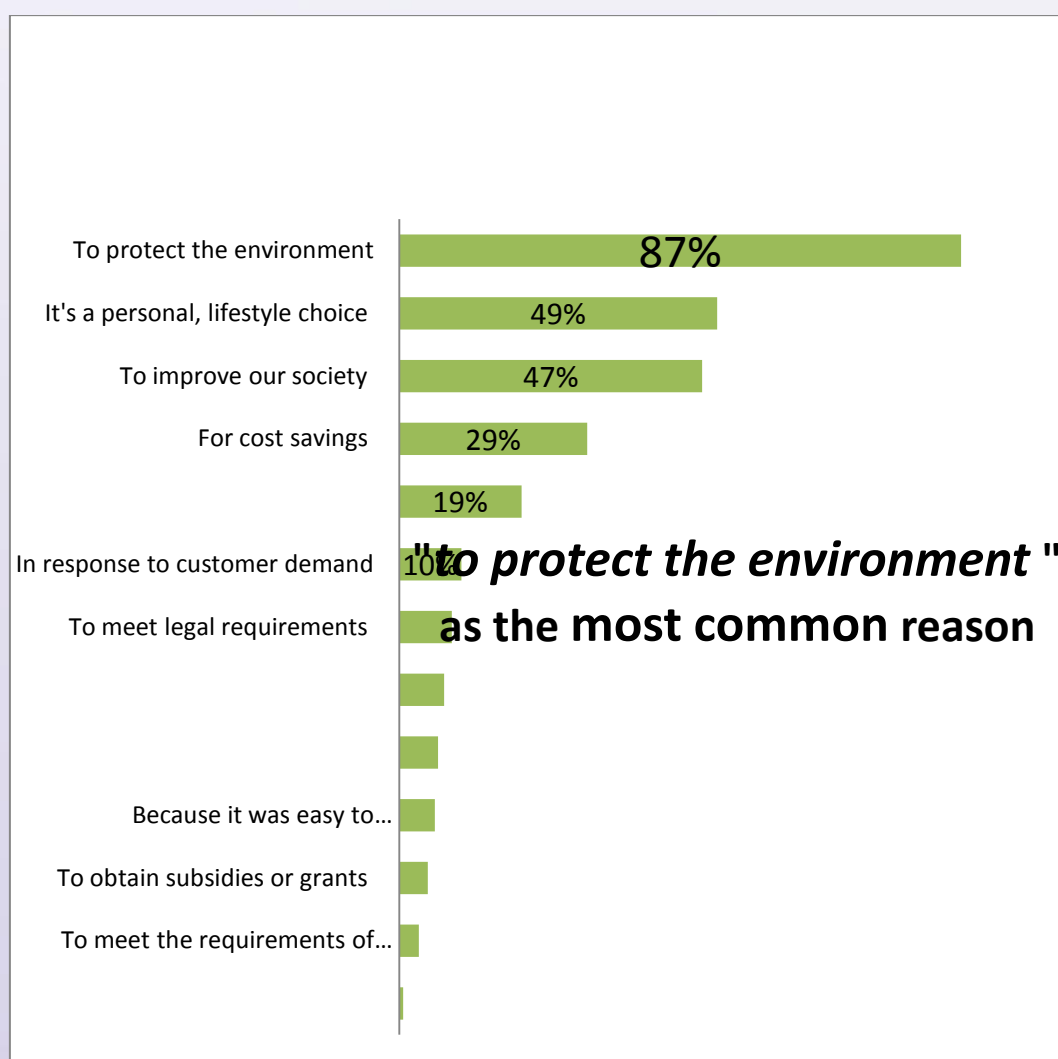
1. Introducing renewable energy sources is more usual in mountain huts and restaurants.
2. Waste recycling is significant related with self-catering apartments, guesthouses and other establishments.
3. Self-catering holiday apartments and restaurants have a strong relationship with encouraging customers to be environmentally friendly in the propriety and encourage customers to consume local products.
4. Hotels, campsites, excursion organisers and activity providers encourage customers be environmentally friendly in nature.
5. Excursion organisers are more likely to collaborate with social projects, support to local communities and encourage customers to consume local products.
6. Hotels are more likely to adapt facilities for disabled people and to choose local staff.

Business category impacts on the number and type of actions taken, with 4-5 star properties reporting the greatest number of actions. 4-5 stars establishments are most likely to implement energy and water savings and waste recycling and encouraging customers to be environmentally friendly in the property and in nature, while 1-2 star businesses are more likely to introduce renewable energies. Reporting use environmentally friendly products was linked to 5-star establishments. Support local community is important for establishments from 2 to 4 stars.

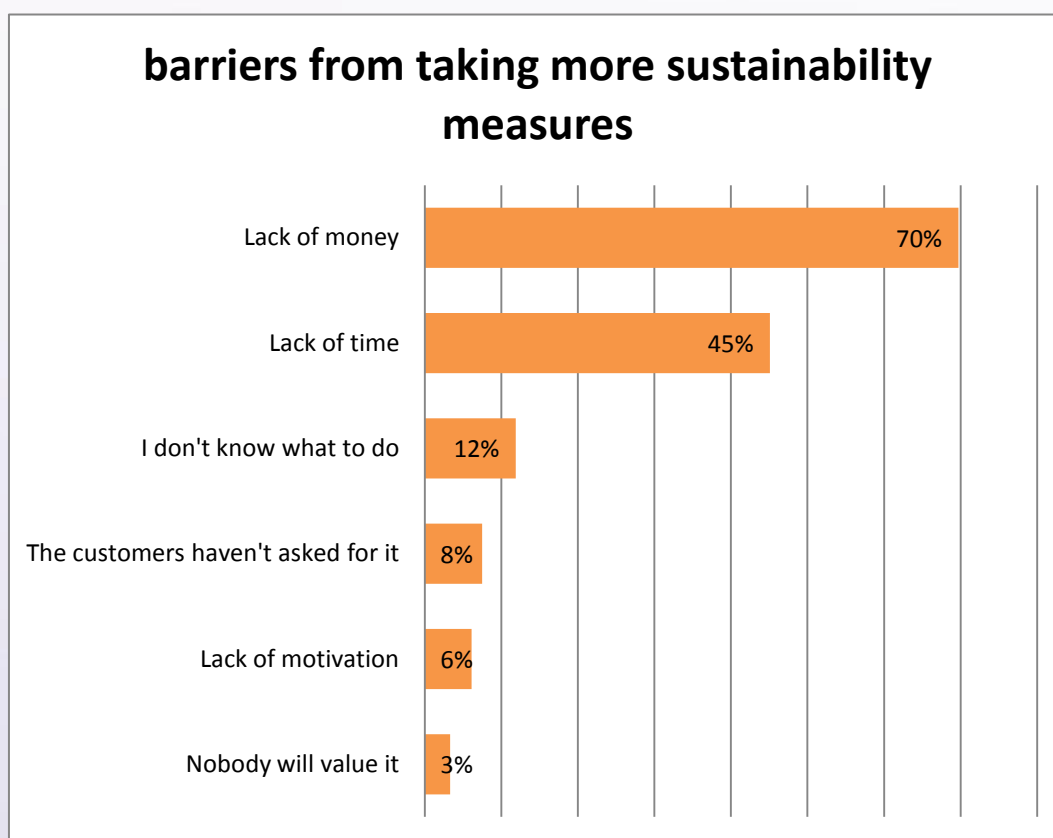
Sustainability certification impacts across triple bottom line, increasing environmental (energy and water saving activities, renewable energy sources, waste recycling, using environmentally friendly products, choosing environmentally friendly suppliers, encouraging customers to be environmentally friendly in the property and in nature), social (collaborate with social projects, support local community development and heritage conservation, adapted facilities, promote gender equality, encourage people of all abilities to apply for jobs, seek to balance work and family, choose responsible suppliers, encourage customers to contribute to social projects) and economic actions(encourage customers to consume local products and choose suppliers that contribute to local development).

Reasons for acting sustainably

The main reasons reported for acting sustainably are altruistic, and not economic. Protection of the environment (87%) and improvements in society (47%) speak to the same altruistic reasons, whereas lifestyle (49%) reasons speak of personal choices made by the business that reflect their personality. The two economic reasons of importance, cost savings (29%) and image and marketing benefits (19%), play a much lower role (See graph 6).

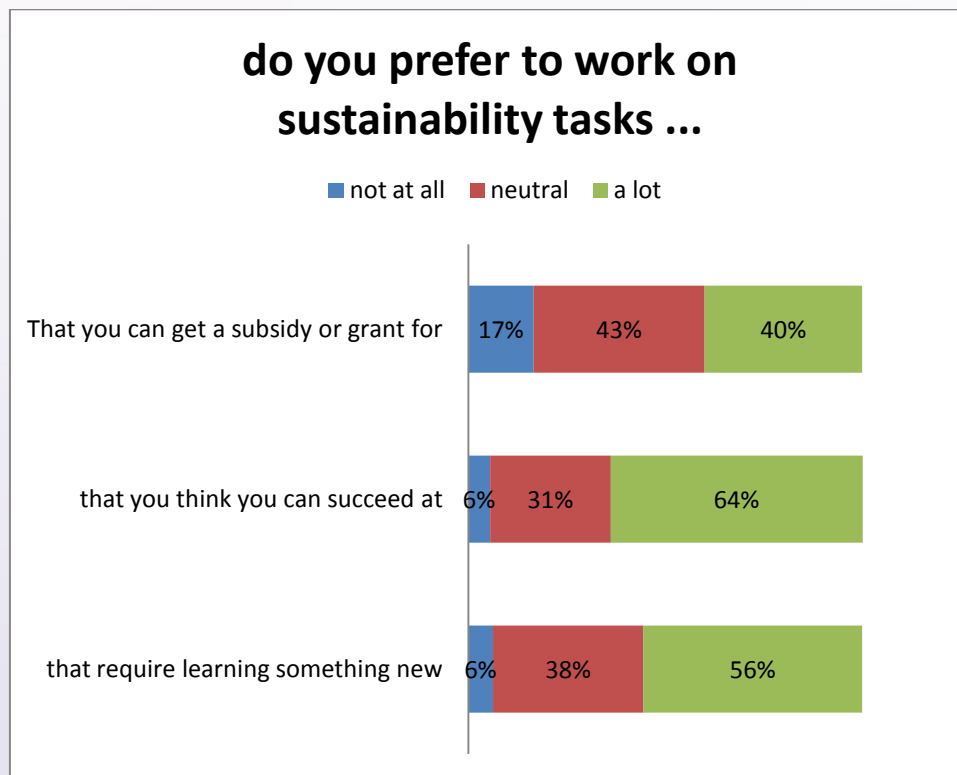


GRAPH 6: REASONS FOR SUSTAINABILITY



GRAPH 7 : BARRIERS FOR SUSTAINABILITY

The reported barriers to introduce CSR practices are primarily the lack of money (70%) and time (45%) (See graph 7). Respondents overwhelmingly prefer to work with tasks that think they can succeed (64%) and to a lesser extent in those who need to learn something new, to innovate (56%). Finally, they seem less motivated to act based on subsidies (40%).



GRAPH 8: PREFERENCES IN SUSTAINABILITY TASKS.

The businesses that state “protecting the environment” as the main reason for acting sustainably don’t take as many eco-savings actions, which are more popular with businesses driven by costs or marketing benefits. Instead these more altruistic businesses introduced environmental measures such as using environmentally friendly products, encouraging customers to be environmentally friendly in the property and in nature. Protecting the environment as a reason for acting does not have a significant relationship with undertaking social or economic actions.

Businesses stating “improving our society” as the main reason for acting sustainably are also more likely to introduce environmental practices such as using environmentally friendly products, encouraging customers to be environmentally friendly in the property and in the nature, one social practice only (supporting local community development and heritage conservation) and one economic practice (choosing local staff wherever possible).

When “lifestyle choice” is the main stated reason, simple environmental practices (energy and water savings activities, waste recycling, use environmentally friendly products) but also more practices requiring more effort (choosing environmentally friendly suppliers and encouraging customers to be environmentally friendly in the nature) were undertaken, but no social or economic practices outside the average.



Two economic reasons for engaging in sustainability were researched. “Cost reduction” relates to eco-saving practices (energy and water savings activities, renewable energy sources and waste recycling) but also with encouraging customers to be environmentally friendly in nature, and social variables that initially not seem related with savings, as supporting local community development and heritage conservation. “Marketing” is the second economic reason, which relates to environmental operational and organizational measures such as energy and water savings activities, renewable energy sources, and waste recycling, the social measure of introducing facilities for disabled people and the economic measure of choosing local staff wherever possible and encouraging customers to consume local products. All of these constitute pro-business actions that would suggest classifying this group as sustainable entrepreneurs that purposefully choose sustainability measures that improve the financial health of their business.

Businesses stating altruistic environmental reasons undertake a larger number of both total sustainability and also total environmental measures. Stating “improving society” or “personal lifestyle choice” as a main reason mean implementing more than average number of measures, but not of any particular type. Economic reasons (costs or marketing) does not affect the number of actions taken, or whether these are cost reduction/income generating, or actions that will inevitably increase operating costs.

Sustainability and profitability are related

Businesses that take more sustainability measures believe their business has benefitted from it in, and are more satisfied with their financial performance than the average. There is positive relationship between the environmental, social and total sustainability measures (but not with economic sustainability measures) and the businesses' current financial situation and its evolution in the last two years. Businesses with a better financial health also introducing environmental eco-savings practices as energy and water savings and waste recycling, but also other altruistic environmental practices.

The businesses that perceive they have financially improved in the last two years, collaborate with social projects, encourage people of all abilities to apply for jobs and encourage customers to contribute to social initiatives. There is no significant positive relationship between the financial performance and any other social or economic sustainability variables. There is a negative relationship between financial performance and encouraging respect for the culture of the area.

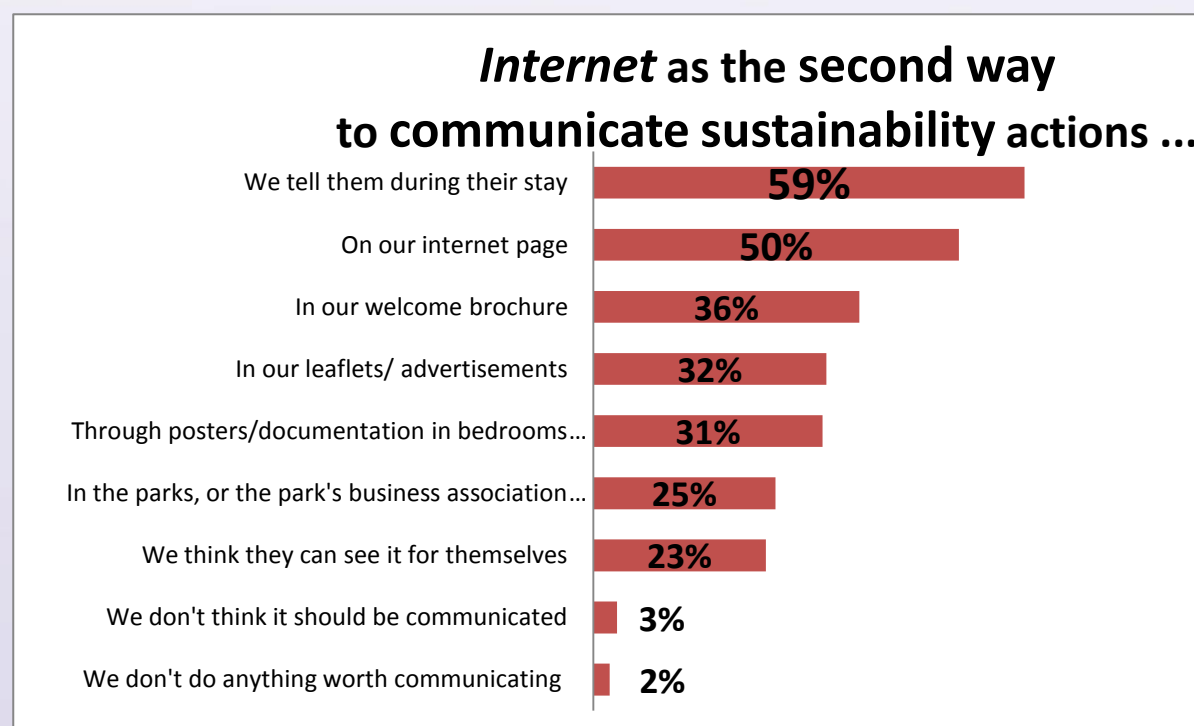
The results are not all positive. Behind the perception of businesses that they are performing well, we find that sustainability does not contribute to improved results in the percentage of low season price out of high season price charge or customers' average length of stay. This suggests that businesses with a pro-sustainability approach are more likely to be satisfied with their performance, even if in actual fact results are not that different.

There are considerable differences in financial performance between the "lifestyle greens" and the "green entrepreneurs", those that undertake sustainability actions because it is part of their beliefs as part of a more wholesome and satisfying life, and those that combine sustainability thinking and values with being profit maximisers. This research provides evidence to policy makers that businesses that undertake sustainability actions are not homogeneous and should not be treated that way, but we need to understand their reasons for acting sustainably and provide appropriate incentives accordingly.

Half of the certified businesses (45%) believe that certification has benefited the success of their business, while 37% are not sure, 18% believe that it has had no impact and none believe that certification has had a negative impact.

Sustainability communications can improve

Although businesses say that clients appreciate their sustainability actions, they are making limited use of it in their marketing and communications. The communications face to face are most common (59%) however these are not systematic and during interviews it becomes obvious that the attitude that clients can see it for themselves (23%) is much more prevalent. An analysis of websites (50%) shows that communications result in mentioning facts, for example the sustainability logo achieved, instead of using sustainability to engage the consumer.



GRAPH 9: WAYS TO COMMUNICATE YOU ARE SUSTAINABLE.

Businesses with sustainability actions believe above average that their customers value their efforts to be sustainable, and these businesses communicate their sustainability more to customers informally (but interestingly, not formally). This suggests again a more informal management style of pro-sustainability businesses.

Methodology

Our empirical research was conducted in European protected areas member of EUROPARC, part of a 18 month project funded by the European Commission Competitiveness and Innovation Framework Programme, “Knowledge networks for the competitiveness and sustainability of European Tourism”. A questionnaire was developed to analyse the relationship between sustainability practices, reasons for implementing sustainability, business performance indicators and background business characteristics. This survey was piloted in Catalonia, Spain, where nearly 4,000 businesses were approached reaching a 12% response rate after two reminders (Garay and Font 2011). A modified version of the pilot questionnaire was developed to reflect the characteristics of businesses other than accommodation and geographical variations on how businesses are classified during a workshop with park representatives from across Europe.

Protected area staff were recruited to distribute the survey in their destinations via the EUROPARC newsletter. Representatives in over 400 EUROPARC protected areas opted to participate. Parks had the survey translated, and a separate url portal was created for every park with their logo and park name, to increase ownership and improve response rates. The survey languages and percentage of responses received were Bulgarian (0.4%), Catalan (8.8%), Czech (0%), Dutch (0%), English (26.2%), Finnish (0.8%), French (1.4%), German (19.7%), Italian (14.3%), Latvian (4.1%), Polish (1.4%), Romanian (0%), Slovak (0.4%), Spanish (22.3%), and Welsh (0.2%). Park staff were send their own url with explanation on the benefits of participating in the survey, which they would distribute amongst tourism businesses in and around their parks. 100 parks were sent reminders every two weeks with the names of business within their own park that had responded, and examples benchmarking their park data with national and European wide data, as encouragement to engage. As many parks wanting to participate had done their own translation, we had assumed a higher participation rate than what was finally achieved. Yet in practice 41 parks did not respond, and from the 59 that did, 70% of all responses came from only 17 parks.

This is now the largest pan-European survey conducted for sustainability behaviour for tourism small firms. The sampling method however does not guarantee generisability, for interviews with the park staff reveal that invitations to participate were not always sent to all businesses in the region but often only those that have a working relationship in with the park, for example by participating in their sustainability forums (a requirement to hold the EUROPARC Charter Park status). Most parks did not have data on the population of tourism businesses including methods to contact them and therefore no comparisons were possible to assess response rates, sampling errors or confidence levels. To this we need to add the self-selection bias and value-action gap that are customary in online and environmental/sustainability surveys. The data analysis therefore focuses on comparisons within the sample- we cannot say that the behaviour of businesses in European national parks matches what these results suggest.



Business size was created as large/medium/small based on maximum daily capacity, and open questions on months with more than 50% occupancy were bracketed. High and low season rates were used to calculate the difference in percentage to test vulnerability to seasonality. Further variables were developed totalling the environmental, social and economic measures, and analysing the type of actions depending on whether they would typically generate profit (either through savings or increased income), would increase operating costs, or would be financially neutral, and whether the sustainability actions were general (i.e. encourage customers to be environmentally friendly) or specific (i.e. facilities are adapted for disabled people).

Appendix. Europe and country results

Frequencies for Europe and key countries with high response rates are displayed here for comparative purposes.

Protected areas with more than 10 responses have received their own statistics compared to their national average and European average.

	Europe	Spain	Wales	Italy	Germany	Latvia	France
Sex							
Male	50%	57%	39%	57%	48%	33%	50%
Female	50%	43%	61%	43%	53%	67%	50%
Age							
Less than 40	23%	34%	10%	32%	16%	38%	15%
41 to 60	64%	64%	66%	61%	65%	57%	69%
More than 60	13%	2%	24%	8%	19%	5%	15%
Studies							
Primary Education	7%	12%	2%	14%	6%	0%	8%
Secondary Education	44%	36%	41%	62%	54%	30%	31%
University Degree	35%	47%	33%	24%	15%	68%	46%
University Postgraduate	13%	5%	25%	0%	24%	3%	15%
Your role							
Owner	78%	69%	90%	86%	74%	66%	54%
Manager	16%	25%	9%	12%	15%	25%	8%
Supervisor	6%	6%	1%	2%	10%	9%	39%
Years since business creation							



Less than 5	22%	26%	28%	17%	9%	29%	0%
6 to 10	24%	27%	24%	14%	21%	37%	39%
11 to 20	24%	25%	22%	16%	31%	26%	31%
More than 20	30%	22%	26%	53%	39%	9%	31%

Business affiliated to some brand name or chain

No	83%	78%	91%	84%	77%	86%	85%
Yes	17%	22%	9%	16%	23%	14%	15%



	Europe	Spain	Wales	Italy	Germany	Latvia	France
Family Business							
Yes	78%	74%	83%	82%	78%	72%	62%
No	22%	26%	17%	19%	22%	28%	39%
Type of business							
Hotel	21%	22%	5%	44%	28%	9%	15%
Apartment	29%	19%	43%	19%	36%	3%	54%
Guesthouse or Bed and Breakfast	14%	5%	22%	14%	9%	57%	8%
Mountain hut	3%	3%	0%	5%	5%	0%	0%
Excursions organiser	5%	8%	1%	2%	6%	31%	0%
Campsite	7%	8%	6%	4%	3%	34%	0%
Restaurant	14%	22%	4%	11%	14%	9%	8%
Activity provider	13%	14%	13%	2%	13%	37%	15%
Other	25%	33%	26%	15%	17%	34%	15%
Category/ number of stars							
1	10%	24%	1%	5%	2%	27%	20%
2	18%	39%	3%	19%	5%	27%	50%
3	36%	31%	20%	51%	52%	53%	30%
4	32%	7%	64%	25%	38%	0%	0%
5	8%	2%	20%	0%	5%	7%	10%
Number of employees (full time)							
Less than 5	80%	85%	91%	60%	68%	82%	80%
6 to 10	10%	9%	5%	17%	12%	6%	20%
11 to 20	6%	3%	2%	15%	10%	9%	0%
Over 20	5%	3%	2%	9%	10%	3%	0%
Number of employees (part time)							
Less than 5	81%	74%	85%	85%	76%	92%	100%
6 to 10	13%	19%	9%	10%	16%	4%	0%
11 to 20	3%	5%	2%	1%	5%	0%	0%



Over 20	3%	2%	4%	4%	4%	4%	0%
Business Size							
<i>Large</i>	10%	12%	7%	8%	13%	42%	0%
<i>Medium</i>	33%	39%	19%	44%	33%	8%	27%
<i>Small</i>	57%	49%	74%	49%	54%	50%	73%

	Europe	Spain	Wales	Italy	Germany	Latvia	France
Months with more than 50% occupancy (in groups)							
<i>from 0 to 2</i>	28%	48%	19%	28%	13%	17%	20%
<i>between 3 and 4</i>	28%	29%	20%	34%	29%	44%	40%
<i>between 5 and 6</i>	23%	13%	23%	29%	32%	33%	0%
<i>more than 6</i>	21%	11%	38%	9%	27%	6%	40%
Annual average occupancy							
30% or less	34%	45%	24%	36%	16%	71%	38%
between 30% and 50% (not included)	28%	33%	20%	18%	36%	29%	25%
between 50% and 70% (not included)	23%	16%	32%	27%	27%	0%	13%
70% and more	15%	6%	25%	18%	21%	0%	25%
Why do customers choose your business?							
<i>Competitive prices</i>	45%	42%	54%	38%	36%	55%	50%
<i>Quality</i>	82%	83%	84%	72%	88%	55%	92%
<i>Location</i>	76%	71%	89%	63%	81%	71%	67%
The top 3 ways that your customers find your business							
Recommendation from past clients	77%	86%	65%	86%	76%	53%	62%
your web page	75%	67%	82%	72%	82%	58%	92%
Internet search	22%	32%	19%	12%	16%	31%	0%
Advertising	13%	3%	22%	12%	17%	19%	8%
Repeat clients	65%	63%	70%	60%	69%	53%	62%
Travel agency	9%	13%	3%	11%	6%	14%	0%
Newspaper/Magazine article	4%	2%	5%	5%	5%	11%	8%
Tourist Information Centres	11%	12%	5%	12%	14%	14%	15%
Radio or Television	2%	3%	1%	1%	2%	0%	8%
Others	5%	3%	13%	2%	1%	8%	8%
I don't know	1%	2%	1%	1%	1%	3%	0%
Percentage low season price out of high season price charge							
<i>less than 50 %</i>	8%	8%	13%	2%	4%	0%	0%



<i>from 50% to less than 70%</i>	21%	18%	15%	40%	20%	0%	25%
<i>70% to less than 80%</i>	17%	19%	9%	26%	20%	0%	13%
<i>80% to less than 90%</i>	19%	22%	12%	14%	21%	39%	38%
<i>90% to less than 100%</i>	4%	4%	7%	3%	3%	0%	0%
<i>100%</i>	31%	29%	44%	15%	33%	62%	25%

	Europe	Spain	Wales	Italy	Germany	Latvia	France
<i>How is your business financial health?</i>							
Poor	14%	20%	13%	11%	9%	15%	39%
Average	61%	59%	59%	64%	67%	67%	23%
Good	24%	21%	28%	25%	25%	18%	39%
<i>How has your financial situation changed in the last two years?</i>							
Improved	24%	12%	23%	27%	39%	23%	39%
The same	41%	31%	47%	48%	46%	26%	39%
Worse	35%	56%	30%	25%	15%	51%	23%
<i>Customers' average length of stay</i>							
1 day	11%	17%	7%	5%	6%	35%	8%
2 to 3 days	46%	72%	39%	26%	29%	42%	54%
4 to 7 days	40%	10%	52%	61%	58%	23%	39%
8 days and over	4%	1%	2%	8%	7%	0%	0%
<i>How do your customers travel ?</i>							
With an organised trip	10%	12%	6%	2%	11%	32%	15%
With the family	45%	46%	37%	55%	43%	44%	62%
As a couple	29%	21%	40%	30%	32%	6%	23%
With friends	13%	17%	13%	11%	8%	15%	0%
Alone	4%	3%	4%	2%	6%	3%	0%
<i>Environmental sustainability measures you apply in your business</i>							
Energy and water saving activities	65%	46%	80%	68%	80%	42%	54%
Renewable energy sources (solar, wind, biomass...)	44%	76%	21%	35%	41%	17%	23%
Waste recycling	63%	22%	95%	75%	82%	28%	92%
Use environmentally friendly products	75%	83%	80%	64%	78%	36%	69%
Choose environmentally friendly suppliers	44%	47%	56%	39%	38%	8%	31%
Encourage customers to be environmentally friendly in your property	68%	70%	75%	71%	52%	69%	85%
Encourage customers be environmentally friendly in nature	63%	58%	63%	69%	62%	72%	85%

	Europe	Spain	Wales	Italy	Germany	Latvia	France
<i>What social sustainability measures do you apply in your business ?</i>							
Collaborate with social and charity projects	36%	31%	51%	19%	34%	36%	36%
Support local community development & heritage conservation	70%	86%	68%	49%	63%	45%	73%
Facilities are adapted for disabled people	41%	52%	40%	44%	31%	23%	18%
Promote gender equality in your employment practices	46%	66%	48%	29%	32%	16%	18%
Encourage people of all abilities to apply for jobs	23%	9%	30%	3%	48%	23%	9%
Seek to balance work and family life for your staff	34%	36%	50%	8%	28%	32%	64%
Choose suppliers that demonstrate their social responsibility	30%	30%	49%	20%	22%	7%	18%
Encourage customers to contribute to social & charity initiatives	35%	22%	41%	21%	60%	19%	36%
Actively encourage respect for the culture & language of the area	43%	54%	59%	43%	0%	65%	27%
<i>What economic sustainability measures do you apply in your business ?</i>							
Choose suppliers that contribute to local development	55%	33%	67%	61%	65%	80%	62%
Choose local staff wherever possible	42%	66%	34%	57%	17%	10%	8%
Staff salaries are above industry average	79%	65%	90%	87%	85%	67%	85%
Encourage customers to consume/use local products	44%	87%	36%	10%	25%	13%	8%
Encourage customers to contribute to charitable activities/ visitor gifting	41%	25%	54%	45%	46%	27%	69%
<i>Do you think your customers value your efforts to be sustainable?</i>							
Yes, all customers	30%	29%	29%	29%	38%	23%	15%
No, none of our customers	2%	2%	0%	4%	1%	3%	0%
Occasionally, some customers	53%	52%	56%	50%	55%	54%	62%
I don't know	15%	17%	15%	16%	6%	20%	23%
<i>How do you know if your customers value your sustainability work?</i>							
They tell us informally	60%	50%	70%	62%	58%	58%	64%
I use face to face questionnaires	18%	29%	6%	18%	22%	6%	27%
I use online questionnaires	2%	2%	1%	7%	1%	0%	0%
I receive feedback online from my customers	6%	4%	7%	5%	10%	9%	0%
I don't know	13%	14%	15%	9%	9%	21%	0%
I'm not interested	1%	0%	1%	0%	0%	6%	9%

	Europe	Spain	Wales	Italy	Germany	Latvia	France
How do you communicate your sustainability actions to your customers?							
In the parks, or the park's business association advertising	25%	32%	14%	16%	39%	13%	15%
On our internet page	50%	54%	57%	38%	49%	28%	39%
In our leaflets/ advertisements	32%	36%	40%	20%	26%	13%	39%
In our welcome brochure	36%	38%	46%	27%	34%	9%	31%
Through posters/documentation in bedrooms and public areas	31%	35%	31%	35%	30%	9%	46%
We tell them during their stay	59%	57%	51%	62%	68%	56%	77%
We think they can see it for themselves	23%	19%	35%	11%	20%	38%	31%
We don't think it should be communicated	3%	3%	1%	6%	3%	13%	8%
We don't do anything worth communicating	2%	1%	3%	2%	2%	9%	0%

What impact has the quality or sustainability had on your business success?

Good	45%	38%	36%	56%	56%	31%	30%
None	18%	17%	26%	9%	16%	25%	30%
Bad	0%	0%	0%	0%	0%	0%	0%
Not sure	38%	45%	38%	35%	29%	44%	40%

What impact has the Charter Park status of your park had on your business ?

Good	27%	30%	10%	29%	42%	46%	8%
None	23%	19%	31%	22%	16%	32%	31%
Bad	0%	0%	1%	0%	0%	5%	0%
Not sure	50%	51%	58%	50%	43%	18%	62%

What are your top three reasons for being sustainable?

To protect the environment	87%	89%	88%	89%	87%	71%	77%
To improve our society	47%	52%	47%	67%	30%	29%	39%
It's a personal, lifestyle choice	49%	46%	59%	22%	59%	69%	69%
For cost savings	29%	24%	33%	30%	28%	29%	46%
For marketing and image benefits	19%	13%	20%	22%	31%	3%	8%
To gain new information, advice and networks	7%	9%	6%	2%	8%	9%	8%
To obtain subsidies or grants	4%	4%	4%	8%	1%	6%	0%



To improve business management data	6%	10%	2%	6%	5%	3%	8%
To meet legal requirements	8%	15%	7%	0%	5%	9%	0%
To meet the requirements of our chain/group	3%	6%	2%	3%	1%	0%	0%
To meet the requirements of a tour operator	1%	1%	0%	1%	0%	0%	0%
In response to customer demand	10%	9%	6%	7%	17%	11%	8%
Because it was easy to implement	6%	4%	7%	13%	1%	0%	0%

	Europe	Spain	Wales	Italy	Germany	Latvia	France
What stops you from taking more sustainability measures ?							
Lack of time	45%	44%	48%	39%	52%	28%	67%
Lack of money	70%	78%	73%	65%	56%	69%	83%
Lack of motivation	6%	7%	3%	11%	5%	10%	0%
I don't know what to do	12%	10%	13%	9%	15%	17%	0%
The customers haven't asked for it	8%	4%	11%	13%	4%	14%	0%
Nobody will value it	3%	3%	6%	0%	2%	10%	0%
Finally, do you prefer to work on sustainability tasks (from 1=not at all, 2= neutral, 3= a lot)							
that require learning something new (=1)	6%	2%	7%	19%	4%	3%	9%
that require learning something new(=2)	38%	25%	56%	48%	23%	43%	46%
that require learning something new(=3)	56%	74%	37%	33%	72%	53%	46%
that you think you can succeed at(=1)	6%	2%	7%	8%	8%	7%	0%
that you think you can succeed at(=2)	31%	25%	33%	56%	17%	31%	40%
that you think you can succeed at(=3)	64%	73%	60%	37%	75%	62%	60%
That you can get a subsidy or grant for(=1)	17%	17%	45%	8%	24%	24%	0%
That you can get a subsidy or grant for(=2)	43%	50%	26%	47%	37%	38%	40%
That you can get a subsidy or grant for(=3)	40%	33%	30%	45%	40%	38%	60%



	Europe	Spain	Wales	Italy	Germany	Latvia	France
Language							
Spanish	22%	72%	0%	0%	0%	0%	0%
Catalan	9%	28%	0%	0%	0%	0%	0%
Italian	14%	0%	0%	100%	0%	0%	0%
English	26%	0%	99%	0%	0%	0%	0%
German	20%	0%	0%	0%	100%	0%	0%
Polish	1%	0%	0%	0%	0%	0%	0%
Welsh	0%	0%	1%	0%	0%	0%	0%
Finnish	1%	0%	0%	0%	0%	0%	0%
Slovak	0%	0%	0%	0%	0%	0%	0%
Bulgarian	0%	0%	0%	0%	0%	0%	0%
Czech	0%	0%	0%	0%	0%	0%	0%
Portuguese	0%	0%	0%	0%	0%	0%	0%
Romanian	0%	0%	0%	0%	0%	0%	0%
French	1%	0%	0%	0%	0%	0%	100%
Latvian	4%	0%	0%	0%	0%	100%	0%
Country							
Spain	31%	100%	0%	0%	0%	0%	0%
France	1%	0%	0%	0%	0%	0%	100%
Italy	14%	0%	0%	100%	0%	0%	0%
Czech Republic	0%	0%	0%	0%	0%	0%	0%
Wales	0%	0%	1%	0%	0%	0%	0%
England	26%	0%	100%	0%	0%	0%	0%
Germany	20%	0%	0%	0%	100%	0%	0%
Poland	1%	0%	0%	0%	0%	0%	0%
Romania	0%	0%	0%	0%	0%	0%	0%
Portugal	0%	0%	0%	0%	0%	0%	0%
Sweden	0%	0%	0%	0%	0%	0%	0%
Belgium	0%	0%	0%	0%	0%	0%	0%
Switzerland	0%	0%	0%	0%	0%	0%	0%
The Netherlands	0%	0%	0%	0%	0%	0%	0%
Slovakia	0%	0%	0%	0%	0%	0%	0%
Finland	1%	0%	0%	0%	0%	0%	0%
Bulgaria	0%	0%	0%	0%	0%	0%	0%
Latvia	4%	0%	0%	0%	0%	100%	0%



Appendix 2. Terms of reference and contact details

STEPPA – Sustainable Tourism in Enterprises, Parks and Protected Areas

Title of Call: Knowledge Networks for the competitiveness and sustainability of European tourism - ENT/CIP/09/B/N06S00

WP 2. RESEARCH ACTIVITIES

Research activities are divided in three themes: 1) literature review, comparison of different methodologies, and group discussions concerning sustainability standards and practices; 2) customer research and 3) business research.

Objective 2.3: Business research aims evaluate sustainable management practices and performance of small and micro enterprises in Charter PAs, as well as drivers and barriers for change.

Business research is implemented as survey to business networks of project partners. The survey is implemented in parallel customer survey during winter 2010/2011. The results will provide quantification and comparison across Europe of competitiveness benefits from sustainable practices (e.g. amount of energy, water and financial savings), occupation levels and trends, contribution to local economy and conservation, etc. Survey will also include qualitative section for identification of innovative practices and solution, common drivers and barriers for the implementation of sustainability schemes, successful business/parks partnership approaches, etc.

Deliverable 2.3: The standardized business survey (one tool in online platform). Research report(s) of the business research (results will be available in the online platform).

Responsibility: Leeds Metropolitan University

Project management and report writing: Xavier Font

Data collection and cleaning: Alborada Gonzalez-Moreno and Daniela Carl

Statistical analysis: Lluís Garay-Tamajón

Statistical support: Steve Jones

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