Sustainable Tourism in Enterprises, Parks and Protected Areas

PROTECTED AREA VISITORS' VIEWS ON SUSTAINABLE TOURISM APPROACHES

SUSTAINABLE TOURISM IN ENTERPRISES, PARKS AND PROTECTED AREAS

STEPPA project'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 (Charter) protected areas, through the sharing, levelling and enhancement of their sustainability practices and criteria, and strengthen their competitiveness through the development of working partnerships between these initiatives and specialized research and support centres for tourism sustainability.

The project involves ten partners from seven countries: University of Eastern Finland (Finland), Leeds Metropolitan University (UK), EUROPARC Federation (Germany), Consejeria de Medio Ambiente (Andalucia, 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).

STEPPA project is part of the EU's Competitiveness and Innovation Framework Programme (CIP).

Developed by:

Centre for Tourism Studies
University of Eastern Finland
Kuninkaankartanonkatu 7, PL 86
57101 SAVONLINNA
Tel: +358 50 439 5377
Email: antti.pitkamaki@uef.fi

Cover Photo: Inchcailloch summit
Picture: Loch Lomond and the Trossachs National Park
Design: EUROPARC Federation, Dea Mijakovac

Summary

The aim of this survey of 1300 protected area visitors was to find out visitors' views on sustainability in several European protected areas and whether sustainable tourism schemes create added value for the visitors. Added value from sustainable tourism schemes means stronger competitiveness for green certified enterprises. According to the results, visitors of protected areas are generally willing to participate in sustainable activities whilst travelling, they have somewhat positive opinions on ecolabels, but they do not recognize green certificates or ecolabels very well.

The survey

Two different questionnaires were used in the survey: one for visitors currently visiting a protected area (the on-site survey) and one for potential customers and previous visitors of protected areas (the previous/potential survey). The survey for the previous and potential visitors was implemented as an online form. The survey for visitors currently visiting a protected area was implemented as on-site paper forms, online forms and face to face interviews or a combination of these, depending on the protected area. Several protected areas from Finland, Germany, Italy, Latvia, the Slovak Republic, Spain and the UK participated in the study. The survey included questions regarding how willing the respondents were to act sustainably whilst travelling, what their opinions on ecolabels were, whether they had used green certified services or products and how well they recognized ecolabels. In this summary, the reported results are averages calculated from the results of each area.

Knowledge on ecolabels is limited

On average 42% of the respondents of the previous/potential survey said they had used ecolabelled services or products or had visited a green certified business or area. Similarly for the on-site survey, on average 41% of the respondents said they had used ecolabelled services or products or had noticed that a business or an area they had visited was green certified. However, only 16% of the respondents of the previous/potential survey could name any ecolabel. Only 9% of the respondents of the on-site survey could name any ecolabel.

Willingness to participate is high for some sustainable activities

The surveys had questions regarding how willing the respondents were to take part in various sustainable activities whilst they are travelling. The respondents were clearly willing to participate in activities that are part of some other necessary activity and not only done for sustainability. Examples of these activities are waste recycling, saving water and energy, considering the

environment when being in nature, using environmentally friendly products and using locally produced food.

The average willingness was only slightly positive or close to neutral for activities that are done specifically for sustainability. These are activities that require more effort than just carrying out necessary activities sustainably. Examples of these activities are giving financial contributions to protect the environment, participating in activities enhancing the state of the environment and actively finding out sustainable measures undertaken in the business/destination. The average willingness was not negative for any of the sustainable activities.

Opinions on ecolabels are somewhat positive

The respondents' opinions on ecolabels were clearly positive regarding the following claims: "Ecolabels help me to recognize environmentally friendly products/services", "An ecolabel helps me to choose and favour sustainably run businesses" and "By purchasing an ecolabelled product or service I feel that I help the nature conservation". The rest of the claims had average opinions that were only slightly positive or neutral. Most of these claims were about attributes of ecolabels that are less directly related to ecological sustainability as

the aforementioned three claims. Examples of these claims are "Ecolabels ensure that tourism in an area supports the quality of life of local residents", "Ecolabel guarantees the good quality of product/service" and "Ecolabels and sustainability schemes have increased my knowledge concerning environmental issues".

Other key observations

When the respondents were asked how satisfied they are with various attributes of the visited protected area, they were clearly satisfied with the natural environment. The average satisfaction was close to neutral for attributes related to human activity such as accommodation, restaurants, cultural services and accessibility.

When comparing the results between different countries, the respondents of the Spanish protected areas showed the highest general willingness towards acting sustainably whilst travelling. They also had the most positive opinions on ecolabels and they were the most knowledgeable regarding green certificates and ecolabels. Many of the respondents of the Spanish areas could mention the European Charter for Sustainable Tourism or a related certificate.

Sustainable tourism schemes have potential

Several findings of the survey point to green certificates and ecolabels as having great potential in adding value for visitors of protected areas. The respondents are generally willing to act sustainably whilst travelling, they find ecolabels a reliable way to recognize environmentally friendly products, businesses and services and they find favouring ecolabelled products a way to act sustainably. However, the results also show that the respondents do not recognize ecolabels or green certificates very well. The results indicate that favouring of green certified services and ecolabelled products could be increased by communicating ecolabels better, which would help to realize the full potential in sustainable tourism schemes.

Table of Contents

Introduction to the survey

Favouring ecolabelled or green certified businesses and products is a way for protected area visitors to act sustainably. This is because an ecolabel or a green certificate ensures that a business or a product follows sustainability criteria. The aim of this study was to find out visitors' point of view regarding ecolabels and other sustainable tourism approaches in several European protected areas. Knowledge of visitors' views on sustainability provides protected areas and the businesses in them with useful information on how much added value sustainable tourism schemes create for visitors. Protected areas from Finland, Germany, Italy, Latvia, the Slovak Republic, Spain and the UK participated in the study. The main collaborating protected areas or organisations managing them, all of which are members of the EUROPARC Federation, were Consejeria de Medio Ambiente (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 Cornwall Sustainable Tourism Project (UK). This study is a part of the STEPPA-project (Sustainable Tourism in Enterprises, Parks and Protected Areas), which is funded by the European Commission Competitiveness and Innovation Framework Programme, "Knowledge networks for the competitiveness and sustainability of European Tourism".

The study was carried out as a survey with two different types of questionnaires. One of the questionnaires was aimed at visitors currently visiting a protected area (referred to as the on-site survey in this report). This questionnaire was implemented either as an electronic survey on computers in the protected area's facilities, as on-site paper questionnaires, or as face to face interviews, or a combination of these, depending on the protected area. The other questionnaire was aimed at potential customers or previous visitors of protected areas (referred to as the previous/potential survey in this report). This questionnaire was implemented as on-line forms which were spread through e-mail lists, websites and social media, depending on the area. Using two different questionnaires made it possible to gain both partly specific information from certain protected areas (the on-site survey) and partly generic information regarding trips to protected areas (the previous/potential survey) and increased the different ways of spreading the forms. The two different questionnaires also allowed comparison of the views of on-site visitors and previous/potential visitors.

To find out the potential in ecolabels and green certificates used in protected areas, the surveys included questions on how willing the respondents are to participate in various sustainable activities whilst travelling. The surveys also included questions on visitors' opinions on different attributes of ecolabels. To find out how familiar protected area visitors are with ecolabels, the surveys included questions regarding whether they have visited green certified protected areas or businesses or used ecolabelled products. The respondents were also asked to name the ecolabels they had noticed. Knowing how well visitors of protected areas recognize ecolabels is important because increasing knowledge on ecolabels has been found to increase tourists' demand for ecolabelled products

(Enhance Management 2000, Foster 2001). The surveys also had questions on spending, satisfaction with the area and various questions on trip characteristics such as what are their most important reasons to visit protected areas, who they usually travel with, how they found about the area and how many nights they plan to stay. The main sources used when designing the surveys for this study were Fairweather et al. (2005), Zografos and Allcroft (2007) and Chafe (2007).

The survey started in spring or early summer 2011 and was completed by the end of July 2011, depending on the area. 610 protected area visitors responded to the on-site survey. The amount of respondents for the previous/potential survey was 681. The total amount of respondents in the study was thus 1291. Because the questions have some differences between the on-site survey and the previous/potential survey, the two surveys are reported separately here. This allows also comparisons between the two surveys. The results are reported here as an average calculated from the results of each country's protected area or areas. The averages are calculated so that each country has the same weight on the result, independent from the amount of respondents. Although the amount of respondents and the amount of participating areas do not permit European-wide generalization, the results show the general trends regarding the studied areas. The most interesting observations regarding the results of specific countries are reported in Section 5. All the results per country are shown in Appendix 1. Country names are used here for the sake of simplification, although the results only relate to the studied protected areas and not to whole countries. Thus, for example, "Latvia" means protected areas managed by Latvian Country Holidays, not all the protected areas in Latvia.

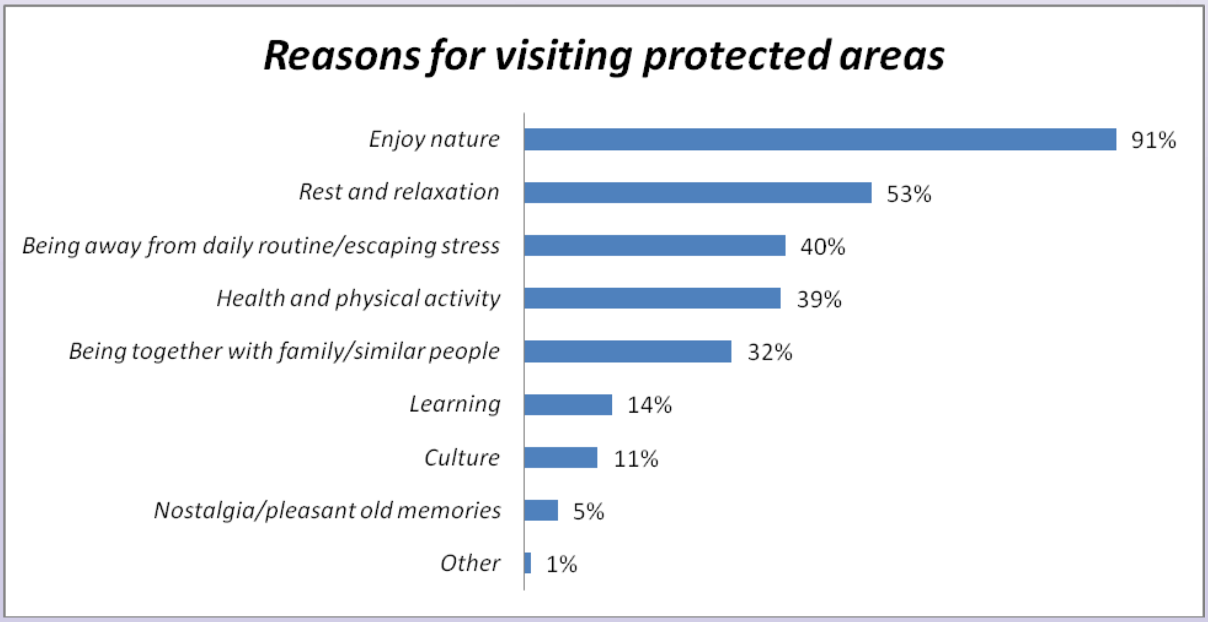
The previous/potential survey

Basic information and general trip characteristics

The survey for previous visitors and potential customers of protected areas had participating protected areas from Finland, Germany, Italy, Latvia and Spain (see Table 1 in Appendix 1 for information on the amount of respondents from each country). The typical respondent of the previous/potential survey was between 26 and 55 years old (45% were between 26 and 40 and 33% were between 41 and 55) and well-educated (61% had a university-level degree and 20% had a college-level degree). The amounts of male and female respondents were 41% and 59%, respectively. Only a very small amount of the respondents were international visitors - 98% of the respondents were natives of the same country as the survey concerned.

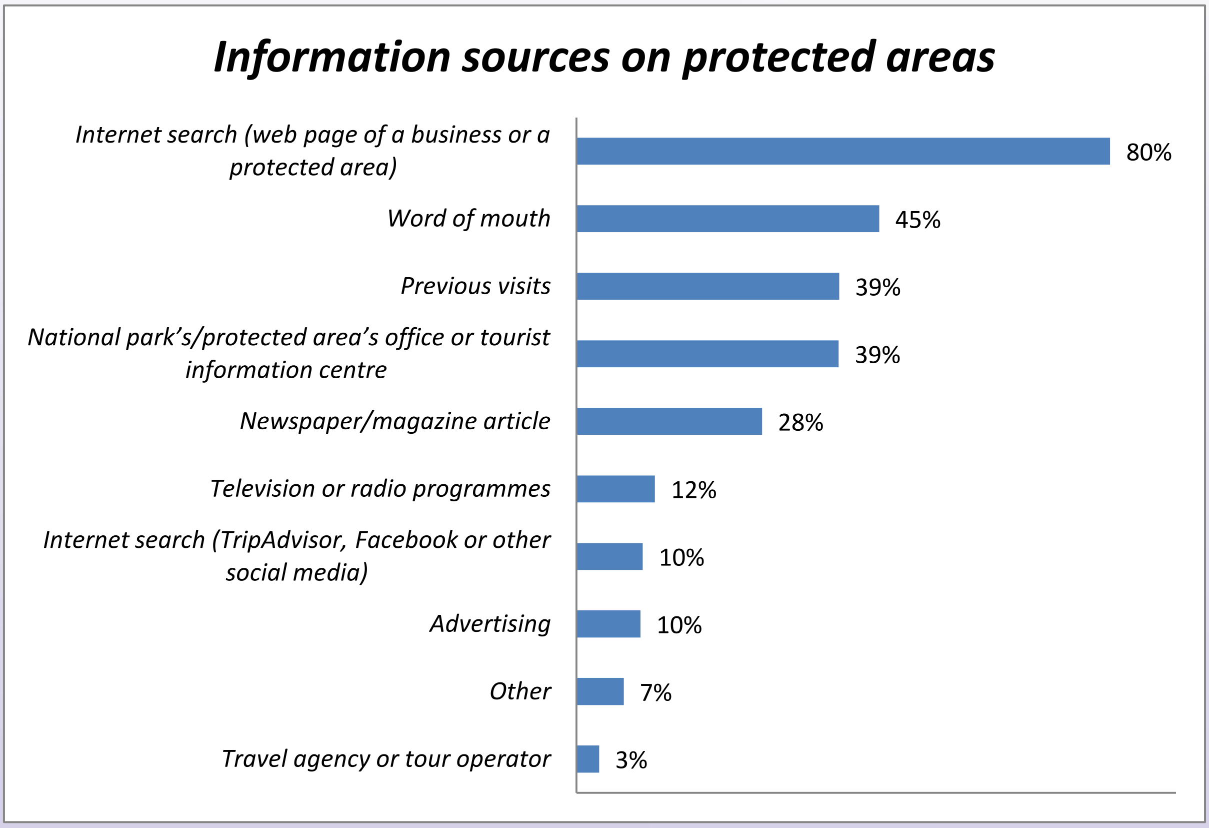
The survey had questions regarding the respondents' visits to protected areas in general. The most common travelling company when travelling in protected areas was spouse/partner (71% of the respondents). Other common travel companions were friends (43%) and children (32%). Only 14% travelled usually alone.

When the respondents were asked which are the three most important reasons for visiting national parks or protected areas, the most common answer was enjoying nature, chosen by 91% of the respondents. See Graph 1 for all of the reasons and how many of the respondents chose them. Most of the respondents also chose enjoying nature as the single most important reason (64%).



Graph 1: Reasons for visiting protected areas (shows how many of the respondents chose each reason as one of the three most important reasons)

When asked which are the three most important information sources that the respondents use when planning visits to national parks or protected areas, the most common source was a web page of a business or a protected area, chosen by 80% of the respondents. However, another Internet-based information source, social media, was chosen only by 10% of the respondents. Also, the commercial information sources of advertising (chosen by 10% of the respondents) and travel agency or tour operator (4%) were not very common. The other information sources and how many of the respondents chose them are shown in Graph 2. The most common information source to be chosen as the single most important source was a web page of a business or a protected area (49%).



Graph 2: Information sources for planning visits to protected areas (shows how many of the respondents chose each source as one of the three most important sources)

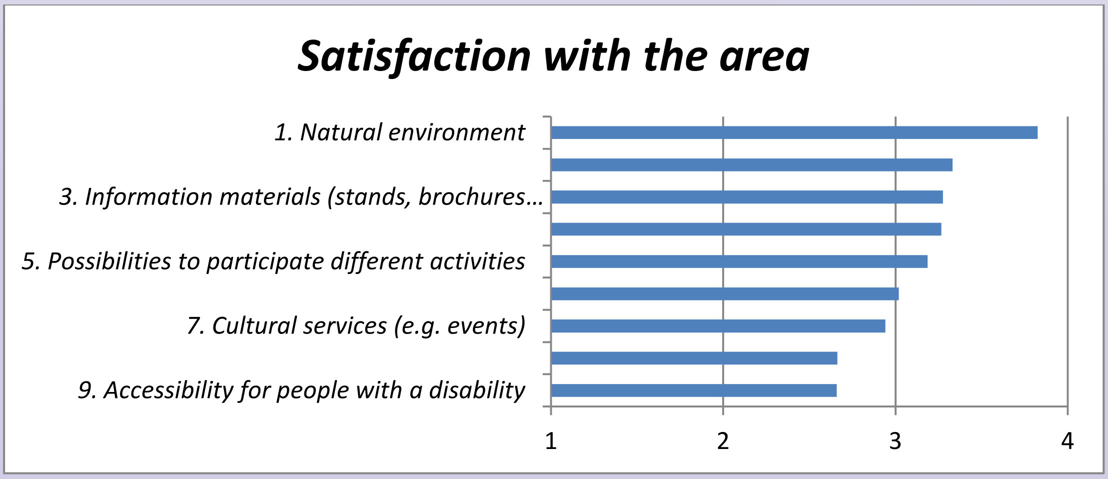
Characteristics of previous visit

The survey had questions regarding the respondents' most recent visit to a protected area. The most common amount of nights the respondents stayed in a protected area was from 1 to 3 (45% of respondents). One day visits were not totally uncommon (23% of the respondents) nor visits of one week or more (21%). It was most common to visit a protected area during summer (chosen by 78%) with none of the other times of year being very unpopular (49% travelled during autumn, 36% during winter and 46% during spring). The average group size was 3.8 adults and 0.7 children.

When asked about the three most important activities that the respondents did during their last visit, the most popular activity was hiking/walking (mentioned by 71% of the respondents). The next most popular activities were enjoying nature (17%), cultural activities (16%) and eating (15%).

The average amount of money spent during the last visit was 300€ per respondent (this differed greatly between areas; see Table 3 in Appendix 1 for the averages of each area). The most common target for spending money was food in restaurants and cafés, chosen by 84% of the respondents. 57% of the respondents spent money on accommodation, 43% on organized programme and recreational services (e.g. guided tours or entry fees to exhibitions), 31% on transportation in the area and 26% on other targets (e.g. fishing licences or equipment hire).

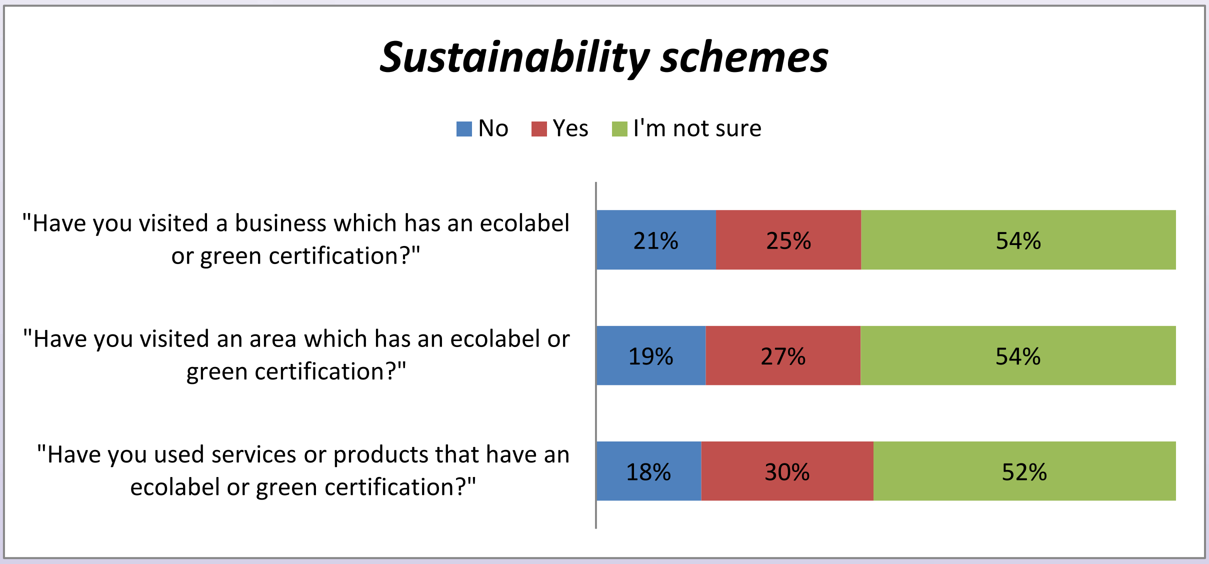
The survey also had questions on the respondents' satisfaction regarding nine different attributes of the protected area they previously visited. The attributes and the results are shown in Graph 3. A Likert scale from one to four was used for the questions with four being "very satisfied" and one "very unsatisfied". The only attribute for which the average opinion was very positive was 1. For the rest of the attributes, the average opinions were somewhat positive except for 8 and 9, for which the satisfaction was close to neutral. The results show that the respondents were more satisfied with the natural environment itself than any anthropogenic attributes of the areas.



Graph 3: Satisfaction regarding different attributes of a previously visited protected area (1 = "very unsatisfied, 4 = very satisfied)

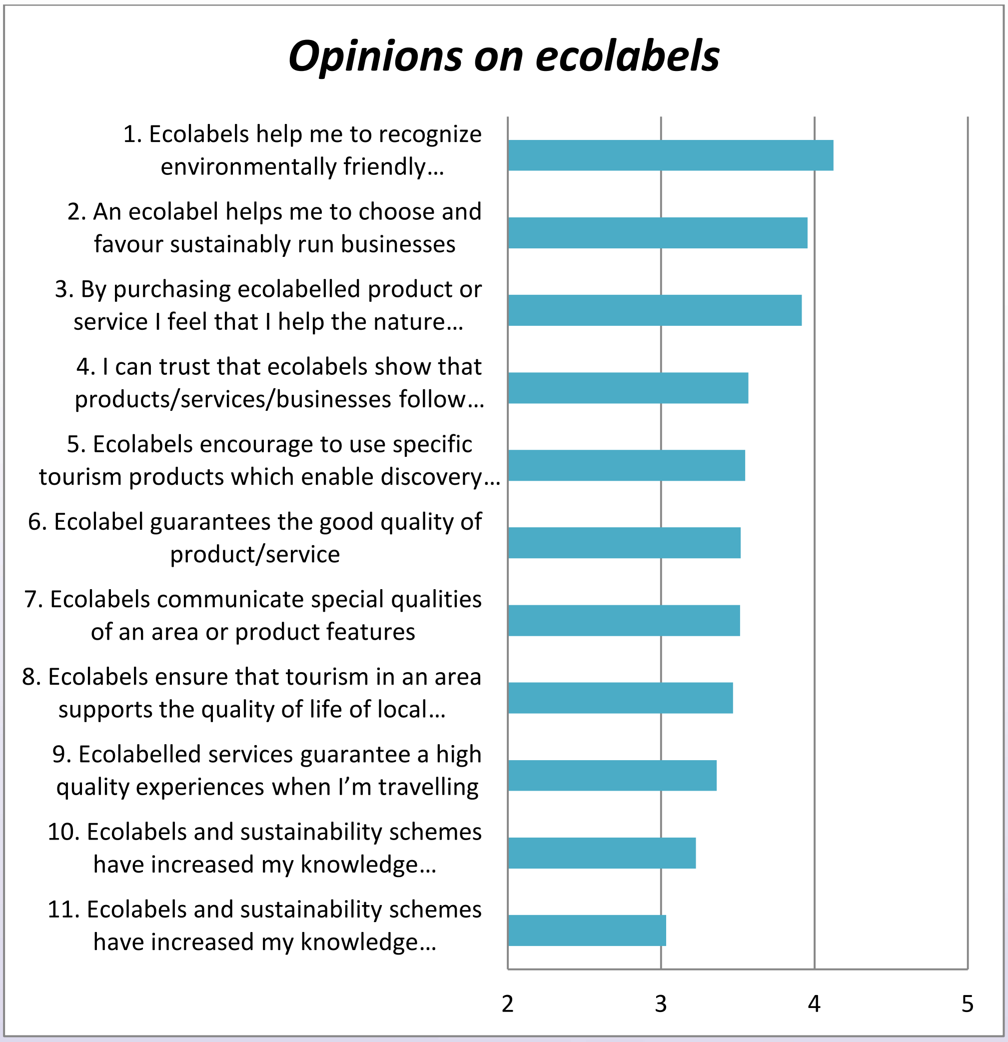
Knowledge and opinions on ecolabels

The survey had the following questions regarding ecolabelled or green certified businesses, services and products: “Have you visited a business which has an ecolabel or green certification?”, “Have you visited an area which has an ecolabel or green certification?” (in this case area refers to a protected area) and “Have you used services or products that have an ecolabel or green certification?” (for some of the areas, an ecolabel specific to the area was used in this question instead of “an ecolabel”). Graph 4 shows the results from these questions. The most common answer was "I'm not sure", around 50% of the responses for each question. The responses of each of the aforementioned three questions were combined to find out how many of the respondents answered positively to at least one of the questions - 42% of the respondents claimed to have visited a business or an area that was green certified or to have used services or products that have an ecolabel.



GRAPH 4: QUESTIONS ON ECOLABELS AND GREEN CERTIFICATIONS

The respondents were also asked to name any of the labels of the areas, businesses, services and products they had used. Although many claimed to have visited or used green certified or ecolabelled areas, services and products in general, only 16% of them could name at least one ecolabel correctly. More than half of all the answers were incorrect. It was common, for example, to give the name of the visited national park as an ecolabel. Examples of ecolabels or certificates that were named correctly are the European Charter for Sustainable Tourism, the EU-Ecolabel, the Nordic Ecolabel, Green Certificate (of Latvia) and ISO 14001. The results show that although it is somewhat common for the respondents to claim that they have visited or used green certified or ecolabelled areas, services and products, in reality they do not recognize green certificates or ecolabels very well. The respondents were also asked to name services and products that have an ecolabel. The majority of the respondents did not name any services or products (the respondents of the Spanish and Finnish surveys had a relatively high amount of respondents who could mention different types of ecolabelled services and products they had used – see the country results for more information).



GRAPH 5: OPINIONS ON ECOLABELS (1 = totally disagree, 5 = totally agree)

In addition to the aforementioned questions on ecolabels, the respondents were asked whether they agree or disagree on 11 different claims on ecolabels (see graph 5 for the claims). A Likert scale from one to five was used with five being "totally agree" and one "totally disagree". As shown in Graph 5, the respondents clearly agreed with claims 1, 2 and 3. The lowest levels of agreement were with regard to claims 10 and 11, for which the opinions were close to neutral. The opinions were slightly positive regarding the rest of the claims (4, 5, 6, 7, 8, and 9). Female respondents tended to have more positive opinions than male respondents in general, but the difference was negligible. Different education or age groups did not have differences regarding the opinions. The results were also analysed so that the respondents were divided into two groups, Group A and Group B. Group A consisted of respondents who claimed to have visited or used green certified or ecolabelled areas, services and products. Group B consisted of those respondents who said they had not or were not sure whether they had visited or used green certified or ecolabelled areas, services and products.

The aim of the division was to find out if those who claim to be at least somehow familiar with ecolabels (Group A) have differing opinions from those who are less familiar with ecolabels (Group B) (whether the respondents could name an ecolabel or not was not used for comparison because the amount of respondents who could name an ecolabel was very low for many of the areas). Group B had a similar general trend as Group A but with opinions slightly more towards neutral for all of the claims. However, despite the slightly less positive opinions, Group B also clearly agreed on claims 1, 2 and 3. The results show that no matter whether the respondents claim to be at least somehow familiar with ecolabels or not, they think of ecolabels as a reliable way to recognize environmentally friendly products, businesses and services. In general the respondents find favouring ecolabelled products a way to act sustainably. However, they agree less with some of the other attributes of ecolabels such as that ecolabels and sustainability schemes themselves would increase environmental knowledge or guarantee high quality experiences.

Sustainable behaviour whilst travelling

GRAPH 6: WILLINGNESS TO TAKE PART IN DIFFERENT SUSTAINABLE ACTIVITIES WHILST TRAVELLING (1 = not willing at all, 5 = very willing)

The survey had questions on how willing the respondents are to take part in different sustainable activities whilst travelling. Their willingness regarding 14 different sustainable activities, listed in Graph 6, was asked. As with the questions regarding opinions on ecolabels, a Likert scale from one to five was used with five being “very willing” and one “not willing at all”. As shown in Graph 6, the highest average willingness was for activity 1 – the willingness to participate in this sustainable activity was very high. The respondents were also generally clearly willing to participate in activities

2, 3, 4, 5, 6, 7, 8 and 9, although the willingness was less than for activity 1. The average willingness was only slightly positive for activities 10, 11 and 12. The lowest average willingness, neutral or very close to it, was for activities 13 and 14. The average willingness was not clearly negative for any of the activities. The only difference between the different genders and the different education and age groups was that female respondents had a slightly higher willingness than male respondents in general. However the difference was negligible. Similarly as with the opinions on ecolabels, the respondents were also divided into the two groups of A and B with Group A having the respondents who claimed to be at least somehow familiar with ecolabels and Group B having those respondents who were less familiar with ecolabels (see section 3.3 for more thorough description of the groups). The average willingness regarding the different sustainable activities tended to be lower for Group B than for Group A, but the difference was negligible.

The results show that the respondents are generally willing to participate in many of the aforementioned sustainable activities whilst travelling. The average willingness for the activities does not differ greatly between those who claimed to be at least somehow familiar with ecolabels and those who were less familiar with ecolabels. In general the respondents are willing to participate in those sustainable activities that are simple and part of some other activity that is necessary, such as buying products and food and getting rid of waste (recycling). The respondents are less willing to participate in sustainable activities that are done separately and only for sustainability, such as planting trees (enhancing the state of the environment) and giving financial contributions to protect the environment.

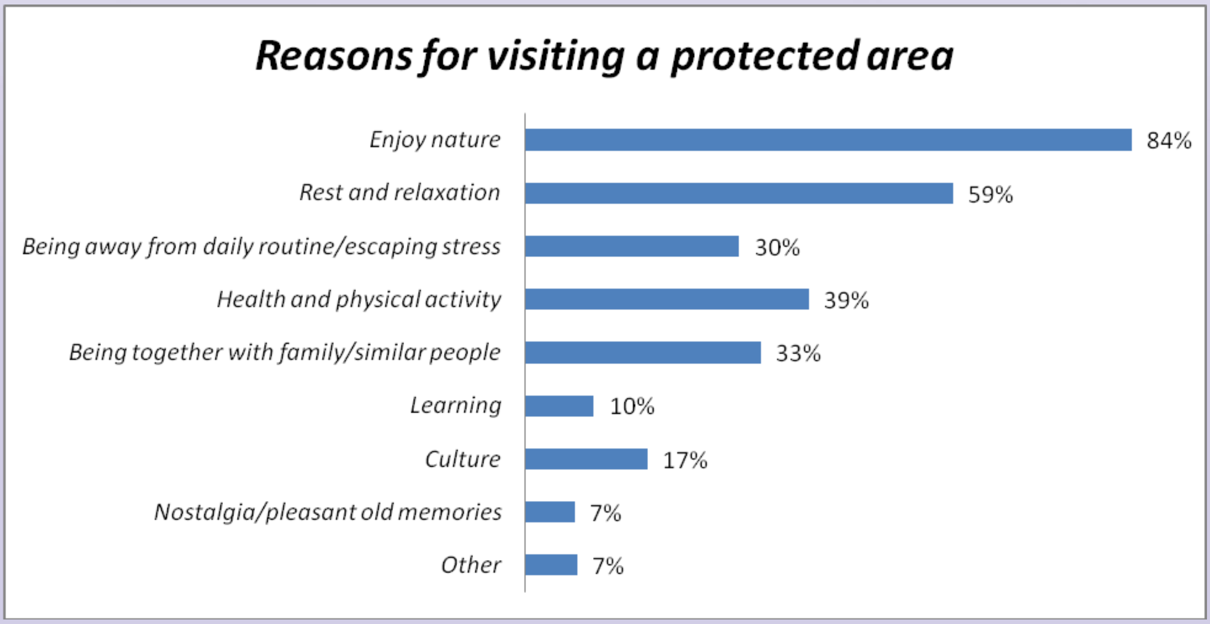
The on-site survey

Basic information and trip characteristics

The survey for current visitors of protected areas had participating protected areas from Germany, Italy, Latvia and Spain, Slovakia and the UK (see Table 5 in Appendix 1 for information on the amount of respondents from each country). Most of the respondents of this survey were between 26 and 55 years old (36% were between 26 and 40 and 32% were between 41 and 55) and well-educated (45 % of the respondents had a university degree and 25% a college-level degree). The amounts of male and female respondents were nearly equal. 92% of the respondents were natives of the same country as the survey concerned.

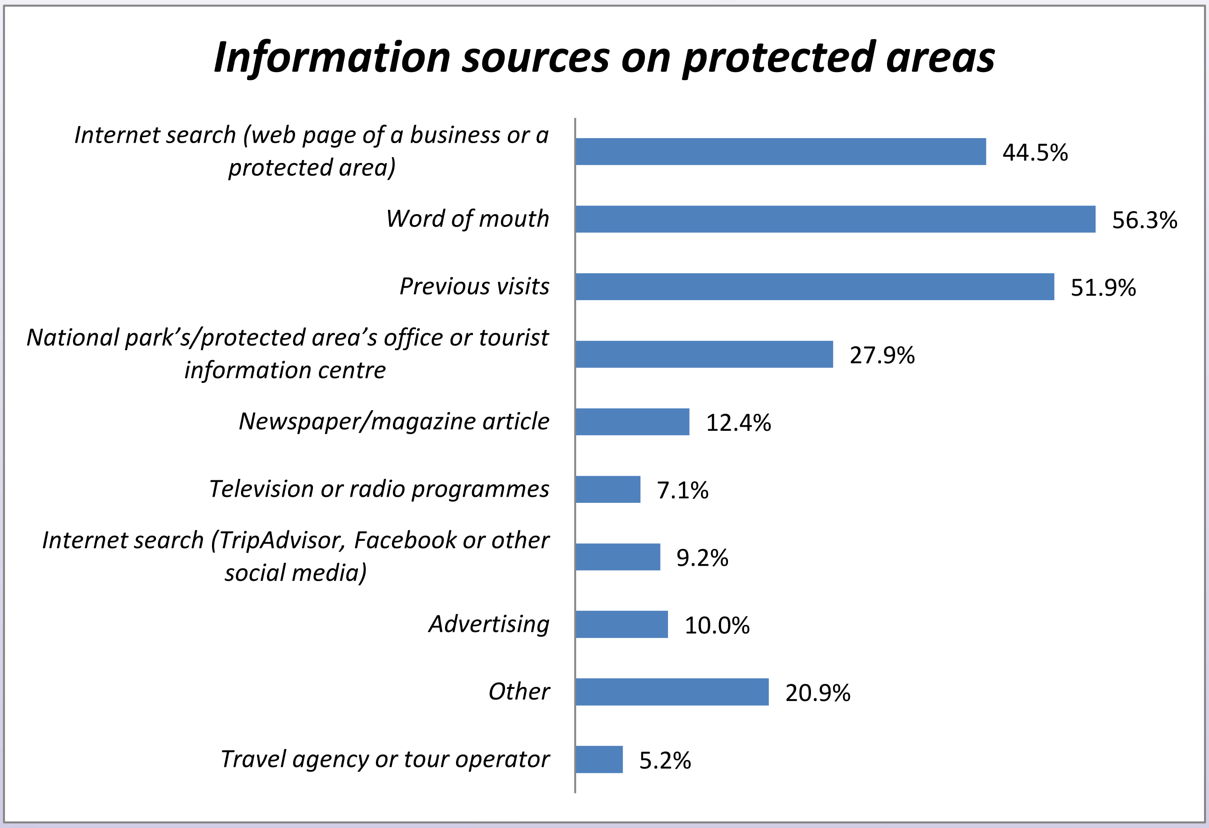
The survey had questions regarding the respondents' current visit to a protected area. The most common travelling companion was spouse/partner (53% of the respondents). Other very common companions were friends (38%) and children (32%). As with the previous/potential survey, travelling alone was not very common (12% of the respondents).

When the respondents were asked which are the three most important reasons why they are visiting the particular protected area, the most common reason was enjoying nature, chosen by 84% of the respondents. The rest of the reasons and how many respondents chose each are shown in Graph 7. As with the previous/potential survey, the most common reason as the single most important reason was enjoying nature (44% of the respondents).



Graph 7: Reasons for visiting a protected area (shows how many of the respondents chose each reason as one of the three most important reasons)

When asked which were the three most important information sources that influenced the respondents to travel to the protected area, the most common sources were word of mouth (56% of the respondents) and respondent's previous visits (52%). As with the previous/potential survey, a web page of a business or a protected area (chosen by 45% of the respondents) was more common than Internet search based on social media (9%). Also similar to the previous/potential survey, advertising (chosen by 10% of the respondents) and travel agency or tour operator (5%) were not very common information sources. See graph 8 for all the information sources and how many respondents chose each.



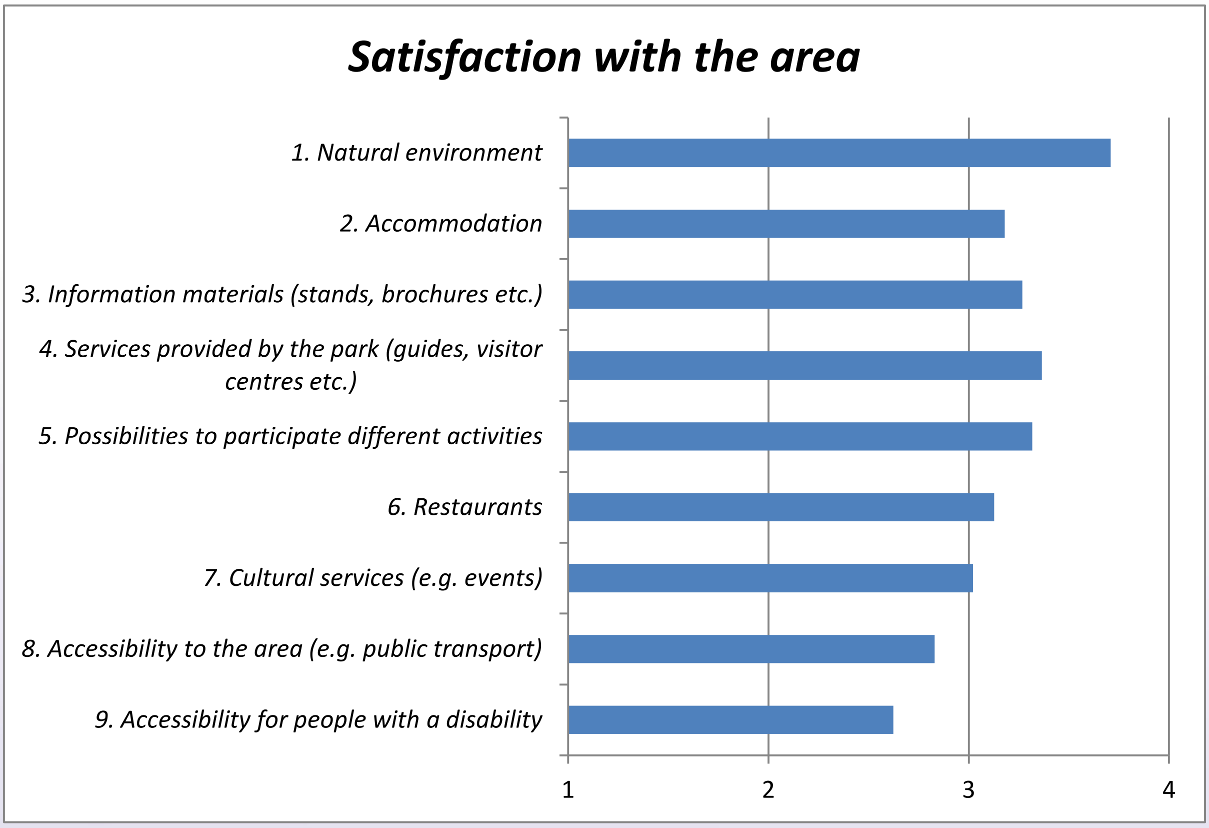
Graph 8: Information sources on protected areas (shows how many of the respondents chose each source as one of the three most important sources)

Of all the respondents, 37% were visiting the particular protected area for only a day. 32% of the respondents were staying from one to three nights in the area. 16% of the respondents were staying for a week or more. The average group size was 2.9 adults and 0.9 children. 63% of the respondents had been in the visited area more than once before, 16% were visiting for the second time and 21% were first-time visitors. Of the respondents who had been in the area before, most had visited the area during summer (83%). 48% of the respondents had visited the area during autumn, 42% during winter and 54% during spring.

When asked about the three most important activities that the respondents had done or were going to do, the most popular activity was hiking/walking (mentioned by 68% of the respondents), as with the previous/potential survey. The next most popular activities were cultural activities (20%), eating (19%), cycling (17%), rest/relaxation (15%) and enjoying nature (15%).

The average total amount of money the respondents were spending in the area was 270€ (similarly to the previous/potential survey, this differed greatly between areas; see table 6 in Appendix 1 for the averages of each area). The targets of spending money were similar to the previous/potential survey: the most common target was food in restaurants and cafés, chosen by 87% of the respondents. 51% spent money on accommodation, 40% on transportation in the area, 34% on organized programme and recreational services (e.g. guided tours or entry fees to exhibitions) and 26% on other targets (e.g. fishing licences or equipment hire).

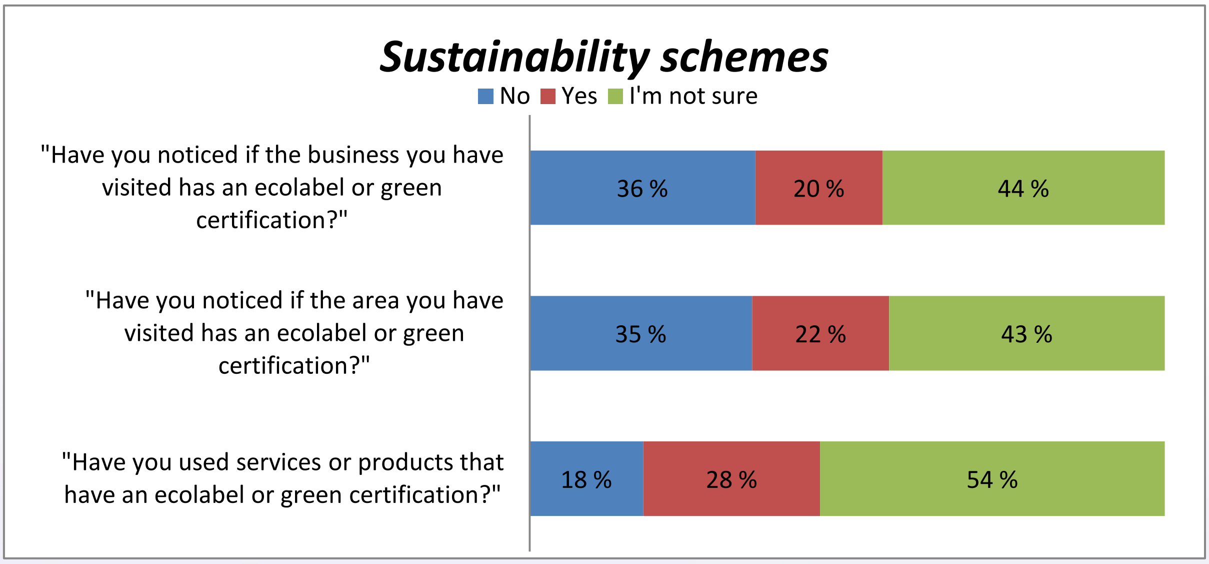
The on-site survey had the same questions on the respondents' satisfaction as the previous/potential survey - their satisfaction regarding nine different attributes of the currently visited protected area was asked. Similarly a Likert scale from one to four was used with four being "very satisfied" and one "very unsatisfied". As seen in graph 9, the results are very similar to those of the previous/potential survey: the only attribute for which the satisfaction was very positive was 1 and for the rest of the attributes, which were anthropogenic unlike 1, the satisfaction was somewhat positive, except for 8 and 9, for which the satisfaction was close to neutral.



GRAPH 9: SATISFACTION REGARDING DIFFERENT ATTRIBUTES OF THE VISITED PROTECTED AREA (1 = "very unsatisfied, 4 = very satisfied)

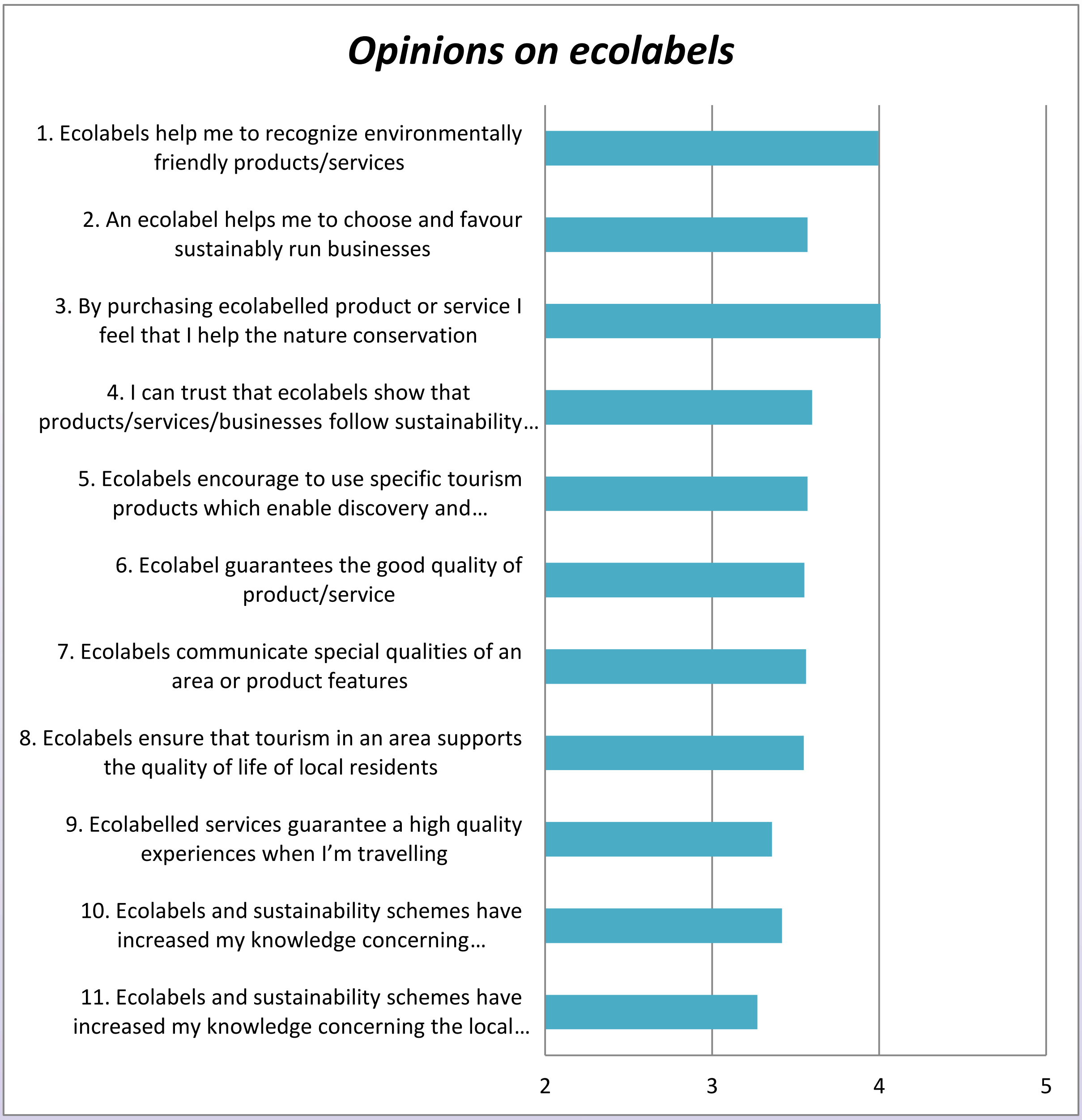
Knowledge and opinions on ecolabels

The on-site survey had the following questions regarding ecolabelled or green certified businesses, services and products: "Have you noticed if the business you have visited has an ecolabel or green certification?", "Have you noticed if the area you have visited has an ecolabel or green certification?" (in this case area refers to a protected area) and "Have you used services or products that have an ecolabel or green certification?" (for some of the areas, an ecolabel specific to the area was used in this question instead of "an ecolabel"). The results from these questions are shown in Graph 10. Similarly to the corresponding questions of the previous/potential survey, a half of the answers to each question were "I'm not sure". Also as with the previous/potential survey, the responses of each of the aforementioned three questions were combined to find out how many of the respondents answered positively to at least one of the them – 41% of the respondents had used products that have an ecolabel or green certification or they had noticed that an area or a business they had visited has an ecolabel or green certification.



GRAPH 10: QUESTIONS ON ECOLABELS AND GREEN CERTIFICATIONS

When asked to name any of the labels of the areas, businesses, services and products the respondents had used, the majority (91%) could note name correctly any ecolabels (Spain was an exception – see the country results for more information). Most of the responses were incorrect answers. Among the correctly named ecolabels or certificates were the European Charter for Sustainable Tourism, the Green Tourism Business Scheme (in the UK) and Geopark. The results of the on-site survey are similar to the results of the previous/potential survey: it is somewhat common for the respondents to say that they have noticed ecolabels in the businesses or areas they have visited or that they have used ecolabelled products, but in practice they do not recognize the labels very well. The majority of the respondents also could not name any ecolabelled products they had used (the UK and especially Spain had a higher than average amount of respondents who could mention different types of services and products – see the country results for more information).



GRAPH 11: OPINIONS ON ECOLABELS (1 = totally disagree, 5 = totally agree)

The on-site survey had the same 11 questions regarding the respondents' opinions on ecolabels as the previous/potential survey and similarly a Likert scale from one to five was used with five being "totally agree" and one "totally disagree". The claims and results are shown in Graph 11. As can be seen from the graph, the results are similar to the results of the previous/potential survey – the respondents clearly agreed with claims 1 and 3. The opinions were slightly positive regards claims 4, 5, 6, 7, 8, 9, 10 and 11. The opinions were only slightly agreeing for claim 2, unlike in the previous/potential survey, where the opinions were clearly agreeing regarding this claim. The difference regarding claim 2 points to how being in a protected area affects the opinions – possibly claim 2 seems less realistic to the respondents in practice (while being in a protected area) than in theory (when not being in a protected area). However, this conclusion has some uncertainty as the on-site survey didn't have all the same participating areas as the previous/potential survey. The female respondents of the on-site survey had slightly more positive opinions regarding each claim than the male respondents. No difference between different age or education groups was detected. As with the previous/potential survey, the results were also compared between two groups, Group A and Group B. Group A consisted of respondents who had used products that have an ecolabel or green certification or who had noticed that an area or a business they had visited has an ecolabel or green certification. The respondents of Group B had not used or were not sure whether they had used ecolabelled products. They also had not noticed whether the areas or businesses they had visited were green certified, or they were not sure about it (whether the respondents could name an ecolabel or not was not used for comparison because the amount of respondents who could name an ecolabel was very low for most of the areas). Group B had generally somewhat less positive opinions than Group A. However, the respondents of Group B were also clearly agreeing with claims 1 and 3, even though their opinions were somewhat less positive than the opinions of Group A. In general, the results of the on-site survey regarding visitors' opinions on ecolabels are similar to the results of the previous/potential survey. The results show that the respondents of the on-site survey find ecolabelled products and green certified services to be environmentally friendly, although the opinions are only slightly agreeing regarding the other claims on ecolabels.

Sustainable behaviour whilst travelling

Graph 12: Willingness to take part in different sustainable activities whilst travelling (1 = not willing at all, 5 = very willing)

The on-site survey had 14 questions regarding how willing the respondents are to take part in different sustainable activities whilst travelling. The questions, shown in Graph 12, are the same as in the previous/potential survey. Similarly a Likert scale from one to five was used with five being "very willing" and one "not willing at all". The results are nearly identical to the results of the previous/potential survey - the highest willingness was with regard to activity 1, for which the willingness was very high. The average willingness was only slightly positive for activities 10, 11 and 12. The willingness was the lowest, close to neutral, for activities 13 and 14. The respondents were clearly willing to participate in the rest of the activities (2, 3, 4, 5, 6, 7, 8 and 9). The results were also compared between the same two groups as used for comparison regarding the opinions on ecolabels: Group A, consisting of respondents who were at least somewhat familiar with ecolabels, and Group B, consisting of respondents who were less familiar with ecolabels. Group A tended to have a higher average willingness regarding most of the activities than Group B, but the difference was not significant. The conclusions are the same as for the previous/potential survey: the respondents are clearly willing to participate in those sustainable activities that are part of some other necessary activity. The average willingness was not negative for any of the sustainable activities.

Country results

The following main observations can be made when comparing the different areas of the study: in general, the respondents of the Spanish surveys had the highest willingness regarding acting sustainably whilst travelling, and they had the most positive opinions on ecolabels (see Table 7 on in Appendix 1). It was very common for the respondents of the Spanish previous/potential survey to claim to have visited a business or an area that was green certified or to have used services or products that have an ecolabel (67% of the respondents as opposed to 42% of the average). 73% of the respondents of the Spanish on-site survey said they had used ecolabelled services or products or had noticed that a business or an area they had visited was green certified (the average for all countries was 41% of the respondents). 31% of the respondents of the Spanish on-site survey could name correctly at least one ecolabel while the average for all countries was 9% (similar difference was not detected in the previous/potential survey). The European Charter for Sustainable Tourism was relatively known in the Spanish protected area of Consejeria de Medio Ambiente - 19% of the respondents of the previous/potential survey of this area could name the European Charter (the amount was 29% for the on-site survey of Consejeria de Medio Ambiente, but the amount of respondents was only 38, making any conclusions somewhat unreliable).

The respondents of the Finnish previous/potential survey (the on-site survey was not used in Finland) were relatively familiar with ecolabelled products: 52% of the respondents claimed to have used ecolabelled products. 30% of the respondents could name at least one ecolabel correctly. The most known ecolabel was the Nordic Ecolabel. The amount of respondents who could mention different types of ecolabelled services and products was 23% for the Finnish previous/potential survey, 37% for the Spanish previous/potential survey, 32% for the Spanish on-site survey and 19% for the on-site survey of the UK. Most of the services and products were accommodation services, detergents and grocery products. It was very uncommon for the respondents of the other countries to mention any ecolabelled products or services.

Conclusions

Both the previous/potential survey and the on-site survey resulted in similar conclusions: visitors of protected areas are willing to behave sustainably when performing tasks that are necessary and they are willing to participate in sustainable activities that are part of some other activity. Examples of these tasks and activities are recycling when getting rid of waste, saving water and energy, using services of environmentally friendly businesses and considering the nature in general. They are less willing to take part in activities that are done specifically for sustainability and thus require more effort than just carrying necessary tasks sustainably. Examples of these activities are participating in activities enhancing the state of the environment, giving financial contributions to protect the environment, and actively finding out sustainable measures undertaken in the business/destination. The average willingness for these activities was close to neutral. The willingness was not negative for any of the sustainable activities. Thus, the results show a general willingness towards acting sustainably among protected area visitors.

The respondents of both of the two surveys think that ecolabels are a way to recognize environmentally friendly products and services, and that favouring ecolabelled products and services is a way to act sustainably. The opinions were not generally negative towards ecolabels or green certificates. The respondents' general willingness to act sustainably whilst travelling and positive opinions on ecolabels point to sustainable tourism schemes as having great potential in adding value for visitors of protected areas. However, in general the respondents could not recognize ecolabels or green certificates very well. Thus, communicating ecolabels better could increase the favouring of green certified services and ecolabelled products. This conclusion is further strengthened by the fact that those respondents who were the least familiar with ecolabels (Group B in sections 3.3, 3.4, 4.2 and 4.3) were also willing to act sustainably and had positive opinions on ecolabels. When comparing the different areas, the respondents of the Spanish surveys showed the highest willingness towards acting sustainably whilst travelling and the most positive opinions on ecolabels.

References

Chafe, Z. (2007). Consumer demand for quality in ecotourism. In R. Black & A. Crabtree (eds.), Quality assurance and certification in ecotourism, 164-195.

Enhance Management (2000) NEAP Consumer Survey: August 2000. Prepared for Tourism Queensland, Brisbane, Australia.

Fairweather, J., Maslin C. & Simmons, D.G. (2005). Environmental Values and Response to Ecolabels Among International Visitors to New Zealand. Journal of Sustainable Tourism 13(1), 82–98.

Foster, D. (2001) The customer's perception of tourism accreditation. Presented at 5th National and 8th International Research Conference on Quality and Innovation Management, Melbourne, 12-14 February 2001.

Zografos, C. & Allcroft, D. (2007). The Environmental Values of Potential Ecotourists: A Segmentation Study. Journal of Sustainable Tourism 15(1), 44-66.

Appendix 1. Country result tables

Result tables for the previous/potential survey

This section displays the results for each country and also the average results, which are calculated so that all countries have the same weight on the results, independent from the amount of respondents. All the possible answers for each closed-ended question are in the same order as they were in the question forms. Also, all the questions in each question group using a Likert scale (such as "What is your opinion about ecolabels?") are also in the same order as they were in the question forms.

Table 1: General information

	Average	Spain	Italy	Germany	Latvia	Finland
Amount of respondents						
	-	161	95	56	213	156
Gender						
Male	41 %	51 %	48 %	48 %	16 %	41 %
Female	59 %	49 %	52 %	52 %	84 %	59 %
Age						
25 or less	9 %	1 %	13 %	12 %	10 %	11 %
26 to 40	45 %	48 %	51 %	30 %	58 %	39 %
41 to 55	33 %	43 %	19 %	40 %	29 %	35 %
56 or more	12 %	8 %	17 %	18 %	4 %	15 %
Education						
Elementary school / Vocational training	19 %	15 %	8 %	35 %	12 %	24 %
College-level degree	20 %	13 %	42 %	18 %	9 %	19 %
University bachelor's degree	35 %	62 %	42 %	5 %	42 %	23 %
University master's degree (or other)	26 %	11 %	7 %	42 %	37 %	34 %
Amount of foreign visitors						
	2 %	1 %	2 %	2 %	2 %	5 %

TABLE 2: GENERAL TRIP CHARACTERISTICS

	Average	Spain	Italy	Germany	Latvia	Finland
"What are the three most important things why you visit national parks or protected areas?"						
Enjoy nature	91 %	96 %	84 %	95 %	84 %	96 %
Culture	11 %	19 %	18 %	11 %	4 %	5 %
Health and physical activity	39 %	42 %	44 %	39 %	32 %	40 %
Rest and relaxation	53 %	39 %	29 %	86 %	63 %	50 %
Learning	14 %	27 %	24 %	9 %	4 %	4 %
Being away from daily routine/escaping stress	40 %	32 %	44 %	25 %	35 %	64 %
Being together with family/similar people	32 %	30 %	12 %	23 %	65 %	30 %
Nostalgia/pleasant old memories	5 %	6 %	5 %	7 %	3 %	6 %
Other	1 %	0 %	1 %	2 %	0 %	2 %
"Please specify what is the most important one"						
Enjoy nature	64 %	79 %	68 %	52 %	47 %	73 %
Culture	1 %	2 %	1 %	0 %	2 %	0 %
Health and physical activity	5 %	3 %	8 %	2 %	5 %	5 %
Rest and relaxation	14 %	7 %	8 %	39 %	15 %	2 %
Learning	2 %	3 %	4 %	2 %	1 %	1 %
Being away from daily routine/escaping stress	7 %	3 %	9 %	0 %	8 %	14 %
Being together with family/similar people	8 %	3 %	3 %	4 %	24 %	4 %
Nostalgia/pleasant old memories	0 %	0 %	1 %	0 %	1 %	0 %
Other	0 %	0 %	0 %	0 %	0 %	1 %
"Who are you traveling with?"						
Alone	14 %	12 %	19 %	11 %	4 %	26 %
Spouse/partner	70 %	78 %	72 %	73 %	69 %	61 %
With child(ren)	32 %	58 %	19 %	20 %	47 %	17 %
Friends	43 %	71 %	44 %	20 %	44 %	38 %
Work colleague(s)	7 %	18 %	2 %	5 %	5 %	2 %
Other	9 %	5 %	6 %	14 %	7 %	10 %
"What are the three most important information sources that you use when you are planning your visit to national parks or protected areas?"						
Word of mouth	45 %	65 %	39 %	39 %	49 %	35 %
Internet search (web page of a business or a protected area)	80 %	81 %	71 %	79 %	78 %	93 %
Internet search (TripAdvisor, Facebook or other social media)	10 %	11 %	9 %	11 %	9 %	10 %
Advertising	10 %	9 %	11 %	5 %	20 %	3 %
My previous visits	39 %	25 %	25 %	52 %	25 %	71 %

Travel agency or tour operator	3 %	4 %	3 %	2 %	8 %	0 %
Newspaper/magazine article	28 %	17 %	38 %	23 %	42 %	19 %
National park's/protected area's office or tourist information centre	39 %	53 %	37 %	41 %	22 %	44 %
Television or radio programmes	12 %	15 %	4 %	11 %	23 %	6 %
Other	7 %	4 %	7 %	11 %	4 %	10 %

	Average	Spain	Italy	Germany	Latvia	Finland
"Please specify what is the most important one:"						
Word of mouth	17 %	27 %	13 %	18 %	19 %	7 %
Internet search (web page of a business or a protected area)	49 %	40 %	38 %	47 %	50 %	71 %
Internet search (TripAdvisor, Facebook or other social media)	3 %	3 %	1 %	8 %	4 %	0 %
Advertising	2 %	0 %	6 %	0 %	3 %	0 %
My previous visits	9 %	6 %	8 %	14 %	3 %	16 %
Travel agency or tour operator	1 %	0 %	2 %	0 %	1 %	0 %
Newspaper/magazine article	5 %	3 %	10 %	0 %	9 %	0 %
National park's/protected area's office or tourist information centre	10 %	17 %	17 %	8 %	3 %	4 %
Television or radio programmes	2 %	3 %	0 %	2 %	4 %	1 %
Other	3 %	1 %	4 %	4 %	2 %	2 %
"Are you planning to visit a national park during one year?"						
No	5 %	12 %	-	4 %	2 %	1 %
Yes	85 %	82 %	-	88 %	77 %	96 %
I'm not sure	10 %	6 %	-	9 %	21 %	3 %
"Are you planning to visit this area during one year?"						
No	-	-	23 %	-	-	-
Yes	-	-	55 %	-	-	-
I'm not sure	-	-	22 %	-	-	-
"Have you visited a national park before?"						
No	6 %	3 %	-	18 %	2 %	3 %
Yes	91 %	95 %	-	75 %	97 %	96 %
I'm not sure	3 %	1 %	-	7 %	1 %	1 %
"Have you visited this area before?"						
No	-	-	44 %	-	-	-
Yes	-	-	53 %	-	-	-
I'm not sure	-	-	3 %	-	-	-

TABLE 3: CHARACTERISTICS OF PREVIOUS VISIT

	Average	Spain	Italy	Germany	Latvia	Finland
"How many nights have you stayed in the area?"						
0	23 %	16 %	13 %	8 %	40 %	36 %
1	14 %	6 %	10 %	5 %	31 %	19 %
2-3	31 %	50 %	30 %	32 %	23 %	21 %
4-6	15 %	15 %	17 %	24 %	4 %	17 %
7-14	12 %	11 %	13 %	24 %	2 %	8 %
>14	9 %	2 %	17 %	8 %	0 %	0 %
"You were there during"						
Summer	78 %	55 %	92 %	86 %	90 %	68 %
Autumn	49 %	61 %	49 %	50 %	55 %	28 %
Winter	36 %	52 %	57 %	33 %	18 %	21 %
Spring	46 %	71 %	53 %	40 %	42 %	23 %
"Could you name the three most important activities you did when you were visiting the area?" (categorized answers from an open-ended question)						
Animal/Wildlife observation	13 %	16 %	19 %	0 %	20 %	8 %
Bathing	4 %	2 %	4 %	10 %	2 %	3 %
Being at campfire	2 %	0 %	0 %	0 %	1 %	7 %
Boating	6 %	3 %	0 %	0 %	14 %	11 %
Camping	3 %	3 %	2 %	0 %	4 %	7 %
Culture	16 %	22 %	17 %	28 %	12 %	1 %
Cycling	11 %	8 %	6 %	25 %	15 %	2 %
Eating	15 %	31 %	13 %	8 %	13 %	11 %
Enjoying nature	17 %	5 %	13 %	10 %	28 %	32 %
Excursion/Touring	12 %	4 %	45 %	5 %	8 %	0 %
Exercise	4 %	1 %	0 %	5 %	6 %	8 %
Hiking/Walking	73 %	90 %	40 %	90 %	66 %	77 %
Horseback riding	1 %	2 %	0 %	0 %	2 %	0 %
Hunting/fishing	2 %	1 %	0 %	0 %	3 %	6 %
Learning/education	7 %	5 %	4 %	8 %	13 %	4 %
Lodging	2 %	1 %	4 %	0 %	6 %	0 %
Mountain climbing	3 %	5 %	6 %	3 %	0 %	1 %
Driving (motor vehicles)	1 %	5 %	0 %	0 %	0 %	0 %
Other	13 %	18 %	15 %	15 %	10 %	7 %
Other sports	3 %	3 %	0 %	10 %	5 %	0 %
Photography	9 %	10 %	11 %	5 %	3 %	16 %
Rest/Relaxation	13 %	11 %	0 %	18 %	19 %	15 %
Shopping	2 %	3 %	0 %	8 %	2 %	0 %
Skiing	4 %	1 %	2 %	5 %	1 %	13 %

Snowshoe walking	2 %	0 %	6 %	0 %	0 %	5 %
Socializing	2 %	3 %	2 %	0 %	2 %	5 %
Water sports	5 %	5 %	2 %	10 %	3 %	8 %
Visiting information/visitor centre or similar	4 %	3 %	17 %	0 %	2 %	0 %
Work / Voluntary work	2 %	2 %	4 %	0 %	2 %	0 %

	Average	Spain	Italy	Germany	Latvia	Finland
"How many people were in your travel party (including you)?"						
Adults	3.8	4.3	3.9	3.6	-	3.4
Children	0.7	1.2	0.6	0.6	-	0.4
"Estimate how much money you spent during your visit in the area"						
	300 €	320 €	180 €	780 €	50 €	140 €
"On what you spent the money for?"						
Accommodation	57 %	77 %	60 %	79 %	29 %	38 %
Food (restaurants and cafés)	84 %	96 %	85 %	95 %	62 %	81 %
Transportation in the area	31 %	5 %	19 %	36 %	61 %	35 %
Organized programme and recreational services (e.g. guided tours or entry fees to exhibitions)	43 %	44 %	33 %	60 %	70 %	9 %
Other expenses (e.g. fishing licences, equipment hire)	26 %	23 %	17 %	31 %	34 %	26 %
"You can also specify how much money you are using / used for different services"						
Accommodation	147 €	174 €	94 €	402 €	14 €	53 €
Food (restaurants and cafés)	97 €	151 €	54 €	222 €	15 €	41 €
Transportation in the area	28 €	2 €	9 €	98 €	21 €	9 €
Organized programme and recreational services (e.g. guided tours or entry fees to exhibitions)	24 €	41 €	9 €	62 €	8 €	1 €
Other expenses (e.g. fishing licences, equipment hire)	27 €	30 €	15 €	64 €	7 €	19 €
"How satisfied were you with the following in the area?" (1 = very unsatisfied, 4 = very satisfied)						
Natural environment	3.8	3.8	4.0	3.6	3.8	3.9
Possibilities to participate different activities	3.2	3.2	3.2	3.2	3.2	3.2
Services provided by the park (guides, visitor centres etc.)	3.3	3.1	3.4	3.3	3.2	3.3
Accommodation	3.3	3.4	3.3	3.4	3.1	3.6
Restaurants	3.0	3.2	3.1	3.0	2.8	2.9
Cultural services (e.g. events)	2.9	2.7	3.2	3.0	3.1	2.8
Accessibility to the area (e.g. public transport)	2.7	2.4	2.6	2.7	2.8	2.8

Accessibility for people with a disability	2.7	2.4	2.4	2.8	2.5	3.2
Information materials (stands, brochures etc.)	3.3	3.1	3.5	3.3	3.2	3.4

TABLE 4: ECOLABELS AND SUSTAINABILITY

	Average	Spain	Italy	Germany	Latvia	Finland
"Have you visited an area which has an ecolabel or green certification?"						
No	19 %	10 %	36 %	25 %	-	5 %
Yes	27 %	50 %	16 %	21 %	-	19 %
I'm not sure	54 %	40 %	48 %	54 %	-	76 %
"Have you visited a business which has an ecolabel or green certification?"						
No	21 %	10 %	32 %	25 %	32 %	5 %
Yes	25 %	44 %	17 %	27 %	13 %	25 %
I'm not sure	54 %	46 %	52 %	48 %	55 %	70 %
"Have you used services or products that have an ecolabel / Have you used services or products that have [the label used in the area]?"						
No	18 %	10 %	24 %	23 %	33 %	1 %
Yes	30 %	53 %	23 %	13 %	8 %	52 %
I'm not sure	52 %	37 %	53 %	64 %	59 %	47 %
Amount of respondents who answered "yes" to at least one of the previous three questions	42 %	66 %	34 %	36 %	19 %	56 %
Amount of respondents who can name correctly at least one ecolabel	16 %	21 %	7 %	20 %	4 %	30 %
Amount of respondents who could name at least one type of ecolabelled service or product	16 %	37 %	5 %	7 %	4 %	23 %
"Can you name any product or service?" (categorized answers from an open-ended question)						
Accommodation	-	30 %	-	-	-	6 %
Cosmetics	-	5 %	-	-	-	0 %
Detergents	-	2 %	-	-	-	44 %
Electricity	-	0 %	-	-	-	8 %
Groceries	-	50 %	-	-	-	19 %
National parks	-	8 %	-	-	-	3 %
Organic products	-	0 %	-	-	-	6 %
Other	-	17 %	-	-	-	25 %

Paper products	-	0 %	-	-	-	36 %
Restaurant	-	13 %	-	-	-	0 %
Tourism service	-	18 %	-	-	-	3 %

"What is your opinion about ecolabels?" (1 = totally disagree, 5 = totally agree)	Average	Spain	Italy	Germany	Latvia	Finland
Ecolabels help me to recognize environmentally friendly products/services	4.1	4.2	4.0	3.7	4.4	4.2
An ecolabel helps me to choose and favour sustainably run businesses	4.0	4.1	3.7	3.6	4.3	4.0
By purchasing ecolabelled product or service I feel that I help the nature conservation	3.9	4.0	3.9	3.6	4.2	3.9
Ecolabels and sustainability schemes have increased my knowledge concerning environmental issues	3.2	3.3	3.5	2.9	3.1	3.3
Ecolabels and sustainability schemes have increased my knowledge concerning the local people and culture	3.0	3.5	3.3	2.7	3.0	2.7
I can trust that ecolabels show that products/services /businesses follow sustainability criteria	3.6	3.8	3.6	3.2	3.8	3.4
Ecolabelled services guarantee a high quality experiences when I'm travelling	3.4	3.6	3.6	3.1	3.5	3.0
Ecolabels communicate special qualities of an area or product features	3.5	3.8	3.6	3.3	3.6	3.1
Ecolabels encourage to use specific tourism products which enable discovery and understanding of the area	3.5	3.9	3.6	3.3	3.6	3.3
Ecolabels ensure that tourism in an area supports the quality of life of local residents	3.5	3.7	3.8	3.2	3.6	3.1
Ecolabel guarantees the good quality of product/service	3.5	3.7	3.8	3.3	3.8	3.0

"How willing are you to take part in following sustainable activities while you are travelling?" (1 = not willing at all, 5 = very willing)	**Average**	**Spain**	**Italy**	**Germany**	**Latvia**	**Finland**
Waste recycling	4.4	4.5	4.6	4.4	4.0	4.7
Use environmentally friendly products	4.2	4.5	4.2	4.2	3.8	4.4
Consider the environment when I'm in nature	4.8	4.8	4.6	4.7	4.9	4.9
Use services of businesses that are supporting local economy	4.0	4.1	4.1	3.9	3.9	4.0
Use services of businesses that are socially responsible	3.9	4.0	4.0	3.9	3.7	4.0
Use services of businesses that consider environment in their activities	4.1	4.2	4.2	4.1	4.1	4.1
Save water and energy	4.2	4.6	4.2	4.1	4.0	4.3
Give my contribution to social initiatives	3.3	3.9	3.2	2.5	3.9	2.9
Give financial contribution to protect the environment	3.1	3.6	2.9	3.1	2.7	3.0
Participating activities enhancing the state of the environment	3.5	4.2	3.5	2.9	3.5	3.2
Using locally produced food	4.3	4.4	4.4	3.9	4.3	4.3
Buying local products	4.2	4.3	4.2	3.9	4.2	4.2
Actively finding out sustainable measures undertaken in the business/destination	3.5	4.2	3.8	3.2	3.2	3.2
Asking businesses about their sustainability practices	2.9	3.5	3.4	2.5	2.4	2.8

Result tables for the on-site survey

This section displays the results for each country and also the average results, which are calculated so that all countries have the same weight on the results, independent from the amount of respondents. All the possible answers for each closed-ended question are in the same order as they were in the question forms. Also, all the questions in each question group using a Likert scale (such as "What is your opinion about ecolabels?") are also in the same order as they were in the question forms.

Table 5: General information

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
Amount of respondents							
	-	78	101	57	226	74	74
Gender							
Male	53 %	67 %	65 %	38 %	63 %	42 %	46 %
Female	47 %	33 %	35 %	63 %	37 %	58 %	54 %
Age							
25 or less	13 %	7 %	3 %	8 %	13 %	33 %	11 %
26 to 40	36 %	49 %	30 %	27 %	42 %	37 %	34 %
41 to 55	32 %	22 %	36 %	46 %	31 %	23 %	35 %
56 or more	19 %	22 %	31 %	19 %	14 %	7 %	19 %
Education							
Elementary school / Vocational training	30 %	37 %	29 %	38 %	13 %	32 %	32 %
College-level degree	25 %	16 %	34 %	14 %	48 %	13 %	26 %
University bachelor's degree	26 %	42 %	36 %	16 %	5 %	36 %	23 %
University master's degree (or other)	18 %	4 %	1 %	32 %	34 %	19 %	19 %
Amount of foreign visitors							
	8 %	5 %	7 %	7 %	20 %	0 %	9 %

TABLE 6: TRIP CHARACTERISTICS

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
"What are the three most important things why you are visiting this area?"							
Enjoy nature	84 %	88 %	87 %	98 %	95 %	82 %	51 %
Culture	17 %	18 %	18 %	32 %	10 %	12 %	12 %
Health and physical activity	39 %	37 %	45 %	35 %	55 %	54 %	9 %
Rest and relaxation	59 %	46 %	40 %	72 %	56 %	65 %	76 %
Learning	10 %	13 %	26 %	9 %	3 %	3 %	4 %
Being away from daily routine/escaping stress	30 %	29 %	33 %	16 %	21 %	9 %	69 %
Being together with family/similar people	33 %	22 %	39 %	21 %	35 %	35 %	43 %
Nostalgia/pleasant old memories	7 %	13 %	6 %	7 %	4 %	4 %	8 %
Other	7 %	19 %	8 %	4 %	3 %	3 %	7 %
"Please specify what is the most important one"							
Enjoy nature	44 %	48 %	40 %	52 %	52 %	59 %	13 %
Culture	2 %	5 %	4 %	2 %	2 %	0 %	0 %
Health and physical activity	11 %	11 %	10 %	10 %	19 %	10 %	3 %
Rest and relaxation	19 %	15 %	12 %	21 %	14 %	15 %	37 %
Learning	3 %	3 %	10 %	0 %	0 %	2 %	3 %
Being away from daily routine/escaping stress	5 %	5 %	4 %	4 %	4 %	0 %	16 %
Being together with family/similar people	12 %	6 %	17 %	6 %	8 %	15 %	17 %
Nostalgia/pleasant old memories	1 %	2 %	2 %	2 %	0 %	0 %	0 %
Other	3 %	5 %	2 %	2 %	1 %	0 %	11 %
"Who are you traveling with?"							
Alone	12 %	24 %	12 %	5 %	21 %	8 %	4 %
Spouse/partner	53 %	41 %	57 %	72 %	35 %	34 %	78 %
With child(ren)	32 %	21 %	28 %	35 %	27 %	34 %	47 %
Friends	38 %	24 %	32 %	39 %	69 %	50 %	16 %
Work colleague(s)	7 %	12 %	1 %	5 %	12 %	7 %	3 %
Other	11 %	12 %	10 %	9 %	6 %	22 %	9 %

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
"What were the three most important information sources that influenced your choice to travel here?"							
Word of mouth	56 %	63 %	62 %	54 %	61 %	45 %	53 %
Internet search (web page of a business or a protected area)	44 %	33 %	58 %	49 %	29 %	47 %	50 %
Internet search (TripAdvisor, Facebook or other social media)	9 %	10 %	2 %	23 %	5 %	5 %	9 %
Advertising	10 %	10 %	17 %	2 %	4 %	14 %	14 %
My previous visits	52 %	45 %	54 %	58 %	59 %	38 %	57 %
Travel agency or tour operator	5 %	0 %	2 %	11 %	1 %	11 %	7 %
Newspaper/magazine article	12 %	10 %	25 %	14 %	6 %	11 %	8 %
National park's/protected area's office or tourist information centre	28 %	24 %	44 %	26 %	37 %	30 %	7 %
Television or radio programmes	7 %	5 %	6 %	5 %	7 %	12 %	7 %
Other	21 %	29 %	13 %	16 %	27 %	20 %	20 %
"Please specify what is the most important one:"							
Word of mouth	26 %	37 %	27 %	23 %	25 %	24 %	11 %
Internet search (web page of a business or a protected area)	15 %	5 %	26 %	21 %	7 %	31 %	13 %
Internet search (TripAdvisor, Facebook or other social media)	3 %	3 %	1 %	6 %	0 %	4 %	2 %
Advertising	3 %	6 %	3 %	0 %	1 %	4 %	0 %
My previous visits	33 %	32 %	24 %	34 %	39 %	11 %	61 %
Travel agency or tour operator	2 %	0 %	0 %	2 %	2 %	2 %	4 %
Newspaper/magazine article	1 %	0 %	6 %	0 %	1 %	0 %	0 %
National park's/protected area's office or tourist information centre	8 %	8 %	7 %	6 %	14 %	13 %	0 %
Television or radio programmes	2 %	2 %	2 %	2 %	1 %	2 %	2 %
Other	7 %	8 %	5 %	4 %	9 %	7 %	7 %
"How many nights do you stay in the area?"							
0	37 %	34 %	59 %	3 %	54 %	77 %	0 %
1	8 %	9 %	8 %	6 %	10 %	15 %	2 %
2-3	24 %	32 %	16 %	42 %	20 %	8 %	14 %
4-6	16 %	16 %	2 %	33 %	13 %	0 %	29 %
7-14	13 %	4 %	10 %	14 %	3 %	0 %	52 %
>14	3 %	4 %	5 %	3 %	0 %	0 %	3 %
"Have you been in the area before?"							
Never	21 %	19 %	19 %	23 %	24 %	21 %	22 %

Once	16 %	16 %	17 %	13 %	14 %	26 %	14 %
More than once	63 %	65 %	64 %	64 %	63 %	53 %	64 %

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
"if you have been in the area, were you here during:"							
Summer	83 %	63 %	94 %	87 %	88 %	82 %	87 %
Autumn	48 %	53 %	20 %	65 %	65 %	52 %	32 %
Winter	42 %	50 %	40 %	67 %	49 %	31 %	15 %
Spring	54 %	58 %	39 %	65 %	65 %	55 %	38 %
"Could you name the three most important activities you have done so far or are going to do?" (categorized answers from an open-ended question)							
Animal/Wildlife observation	10 %	4 %	33 %	6 %	1 %	8 %	11 %
Bathing	2 %	0 %	8 %	4 %	0 %	2 %	0 %
Boating	3 %	1 %	0 %	0 %	0 %	3 %	11 %
Camping	1 %	3 %	0 %	2 %	1 %	0 %	0 %
Culture	20 %	30 %	5 %	30 %	11 %	24 %	21 %
Cycling	17 %	11 %	3 %	25 %	24 %	24 %	16 %
Eating	19 %	32 %	35 %	4 %	8 %	10 %	26 %
Enjoying nature	15 %	13 %	0 %	9 %	7 %	53 %	5 %
Excursion/Touring	9 %	1 %	38 %	0 %	2 %	16 %	0 %
Exercise	2 %	1 %	0 %	6 %	3 %	5 %	0 %
Hiking/Walking	67 %	68 %	58 %	92 %	76 %	16 %	95 %
Horseback riding	2 %	6 %	0 %	0 %	5 %	0 %	0 %
Hunting/fishing	0 %	0 %	2 %	0 %	1 %	0 %	0 %
Learning/education	3 %	1 %	0 %	4 %	6 %	6 %	0 %
Lodging	0 %	1 %	0 %	0 %	1 %	0 %	0 %
Mountain climbing	1 %	6 %	0 %	2 %	0 %	0 %	0 %
Driving (motor vehicles)	1 %	0 %	0 %	2 %	0 %	0 %	5 %
Other	18 %	24 %	0 %	17 %	10 %	32 %	26 %
Other sports	10 %	10 %	12 %	2 %	20 %	11 %	5 %
Photography	2 %	10 %	1 %	0 %	3 %	0 %	0 %
Rest/Relaxation	15 %	11 %	6 %	9 %	36 %	15 %	16 %
Shopping	2 %	0 %	1 %	4 %	0 %	3 %	5 %
Skiing	3 %	0 %	7 %	8 %	5 %	0 %	0 %
Snowshoe walking	1 %	0 %	6 %	0 %	0 %	0 %	0 %
Socializing	4 %	6 %	2 %	9 %	1 %	6 %	0 %
Water sports	7 %	0 %	3 %	11 %	0 %	3 %	26 %

Visiting information/visitor centre or similar	7 %	4 %	35 %	0 %	1 %	2 %	0 %
Work / Voluntary work	2 %	8 %	1 %	0 %	3 %	0 %	0 %

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
"How many people are in your travel party (including you)?"							
Adults	2.9	3	3	4.3	2	-	2
Children	0.9	1.5	0.7	0.9	0.2	-	1.2
"Estimate how much money you will spend / have spent during your visit in the area"							
	270 €	240 €	80 €	620 €	60 €	20 €	630 €
"On what you are spending the money for?"							
Accommodation	51 %	63 %	25 %	74 %	35 %	28 %	78 %
Food (restaurants and cafés)	87 %	88 %	82 %	94 %	91 %	77 %	89 %
Transportation in the area	39 %	34 %	11 %	55 %	63 %	47 %	28 %
Organized programme and recreational services (e.g. guided tours or entry fees to exhibitions)	34 %	22 %	37 %	45 %	10 %	55 %	33 %
Other expenses (e.g. fishing licences, equipment hire)	22 %	14 %	12 %	28 %	20 %	33 %	22 %
"You can also specify how much money you are using / used for different services"							
Accommodation	187 €	144 €	25 €	269 €	16 €	9 €	658 €
Food (restaurants and cafés)	90 €	78 €	30 €	138 €	33 €	11 €	252 €
Transportation in the area	10 €	13 €	4 €	16 €	7 €	12 €	9 €
Organized programme and recreational services (e.g. guided tours or entry fees to exhibitions)	20 €	16 €	12 €	18 €	2 €	8 €	63 €
Other expenses (e.g. fishing licences, equipment hire)	35 €	10 €	5 €	40 €	11 €	12 €	132 €
"How satisfied were you with the following in the area?" (1 = very unsatisfied, 4 = very satisfied)							
Natural environment	3.7	3.7	3.9	3.5	3.7	3.8	3.6
Possibilities to participate different activities	3.3	3.2	3.4	3.2	3.1	3.4	3.5
Services provided by the park (guides, visitor centres etc.)	3.4	3.4	3.6	3.4	2.9	3.5	3.4
Accommodation	3.2	3.4	3.4	3.0	2.9	3.0	3.4
Restaurants	3.1	3.5	3.6	3.0	2.7	2.7	3.4
Cultural services (e.g. events)	3.0	3.1	2.7	3.0	3.0	3.3	3.1
Accessibility to the area (e.g. public transport)	2.8	2.8	2.8	3.0	2.8	2.9	2.7
Accessibility for people with a disability	2.6	3.2	2.6	2.9	1.7	2.8	2.6
Information materials (stands, brochures etc.)	3.3	3.4	3.3	3.2	3.0	3.3	3.3

TABLE 7: ECOLABELS AND SUSTAINABILITY

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
"Have you noticed if the area you have visited has an ecolabel / green certification?"							
No	35 %	29 %	66 %	19 %	26 %	30 %	39 %
Yes	22 %	46 %	1 %	18 %	27 %	24 %	14 %
I'm not sure	43 %	24 %	33 %	63 %	47 %	46 %	47 %
"Have you noticed if the business you have visited has an ecolabel / green certification?"							
No	36 %	24 %	62 %	28 %	32 %	24 %	42 %
Yes	20 %	38 %	5 %	12 %	11 %	38 %	16 %
I'm not sure	44 %	37 %	33 %	60 %	57 %	38 %	42 %
"Have you used services or products that have an ecolabel / Have you used services or products that have [the label used in the area]?"							
No	18 %	6 %	31 %	12 %	13 %	35 %	9 %
Yes	28 %	50 %	25 %	11 %	33 %	12 %	36 %
I'm not sure	54 %	44 %	45 %	77 %	54 %	53 %	54 %
Amount of respondents who answered "yes" to at least one of the previous three questions	41 %	73 %	29 %	21 %	47 %	26 %	49 %
Amount of respondents who could name correctly at least one ecolabel	9 %	31 %	4 %	7 %	0 %	0 %	11 %
Amount of respondents who could name at least one type of ecolabelled service or product	11 %	32 %	1 %	2 %	8 %	1 %	19 %
"Can you name any product or service?" (categorized answers from an open-ended question)							
Accommodation	-	32 %	-	-	6 %	-	14 %
Cosmetics	-	4 %	-	-	0 %	-	0 %
Detergents	-	0 %	-	-	0 %	-	36 %
Groceries	-	60 %	-	-	83 %	-	14 %
Organic products	-	0 %	-	-	6 %	-	0 %

Other	-	8 %	-	-	6 %	-	57 %
Paper products	-	4 %	-	-	0 %	-	0 %
Tourism service	-	8 %	-	-	0 %	-	0 %

	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
"What is your opinion about ecolabels?"							
(1 = totally disagree, 5 = totally agree)							
Ecolabels help me to recognize environmentally friendly products/services	4.0	4.4	4.2	3.5	4.0	-	3.9
An ecolabel helps me to choose and favour sustainably run businesses	3.6	4.3	3.2	3.3	3.7	-	3.4
By purchasing ecolabelled product or service I feel that I help the nature conservation	4.0	4.3	4.3	3.6	4.1	-	3.9
Ecolabels and sustainability schemes have increased my knowledge concerning environmental issues	3.4	4.0	3.6	2.8	3.4	-	3.4
Ecolabels and sustainability schemes have increased my knowledge concerning the local people and culture	3.3	3.9	3.3	2.6	3.3	-	3.2
I can trust that ecolabels show that products/services /businesses follow sustainability criteria	3.6	4.1	3.5	3.0	3.9	-	3.5
Ecolabelled services guarantee a high quality experiences when I'm travelling	3.4	4.1	3.3	2.9	3.3	-	3.1
Ecolabels communicate special qualities of an area or product features	3.6	4.2	3.8	3.0	3.5	-	3.3
Ecolabels encourage to use specific tourism products which enable discovery and understanding of the area	3.6	4.3	3.8	3.0	3.5	-	3.3
Ecolabels ensure that tourism in an area supports the quality of life of local residents	3.5	4.1	3.6	2.9	3.7	-	3.5
Ecolabel guarantees the good quality of product/service	3.6	4.1	3.6	3.0	3.6	-	3.4

"How willing are you to take part in following sustainable activities while you are travelling?" (1 = not willing at all, 5 = very willing)	Average	Spain	Italy	Germany	Slovakia	Latvia	UK
Waste recycling	4.2	4.4	4.6	4.1	4.1	4.0	4.2
Use environmentally friendly products	4.1	4.5	3.5	4.0	4.3	4.2	4.1
Consider the environment when I'm in nature	4.7	4.8	4.9	4.6	4.6	4.7	4.6
Use services of businesses that are supporting local economy	3.9	4.2	3.9	4.0	3.4	3.8	4.2
Use services of businesses that are socially responsible	3.8	4.2	3.4	3.8	3.4	4.0	4.0
Use services of businesses that consider environment in their activities	4.1	4.3	3.9	4.1	4.0	4.3	4.1
Save water and energy	4.2	4.6	4.3	4.1	4.1	4.0	4.2
Give my contribution to social initiatives	3.4	3.7	2.6	3.1	3.4	4.1	3.5
Give financial contribution to protect the environment	3.2	3.7	2.3	3.4	3.3	3.1	3.2
Participating activities enhancing the state of the environment	3.6	4.1	3.2	3.3	3.6	3.9	3.3
Using locally produced food	4.2	4.4	4.3	4.0	3.8	4.3	4.2
Buying local products	4.1	4.2	4.4	4.0	3.8	4.3	4.2
Actively finding out sustainable measures undertaken in the business/destination	3.6	4.2	3.5	3.3	3.5	3.8	3.1
Asking businesses about their sustainability practices	3.1	3.6	2.2	2.8	3.4	3.5	3.0

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 2.2: Customer research aims to get customer point of view on implemented sustainable tourism approaches. It is also important to recognize if sustainable tourism schemes used in Charter PAs and business/parks Charter partnerships create added value to customers and hence strengthen the competitiveness of small and micro size enterprises in nature tourism sector.

Customer research is implemented through customer survey. Survey will be structured in way that it can be used in every European country, to allow regional, national and international comparability of data. The survey is implemented in winter 2010/2011 and summer 2011. The results will give more detailed customer information in protected areas, e.g. what are the things/issues that give added value for tourists in different areas (and across all of them). This information can then be used as a base for product and service development. It can also provide guidelines to tackle small enterprises' sustainability challenges like seasonality, skills' needs, use of information and communication technologies, accessibility and transport, etc.

Deliverable 2.2: The standardized customer survey (will be one tool in the online platform). Customer research report(s) (research results will be available on the online platform).

Responsibility: University of Eastern Finland

Project management: Henna Konu
Report writing: Antti Pitkämäki
Data collection and cleaning: Antti Pitkämäki and Laura Koskinen
Statistical analysis: Antti Pitkämäki
Statistical support: Antti Honkanen

For all enquiries related to this project please contact:

Antti Pitkämäki

Centre for Tourism Studies

University of Eastern Finland

Kuninkaankartanonkatu 7, PL 86

57101 SAVONLINNA

Tel: +358 50 439 5377

Email: antti.pitkamaki@uef.fi

www.europarc.org