



# The Responsible Travel Market in Cambodia

## A Scoping Study



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# Basic Facts about SNV

## Our Mission

SNV is dedicated to a society where all people enjoy the freedom to pursue their own sustainable development. We contribute to this by strengthening the capacity of others.

We help alleviate poverty by focusing on increasing people's income and employment opportunities in specific productive sectors, as well as improving their access to water and sanitation, education and renewable energy.

## What do we do?

SNV supports national and local actors within government, civil society and the private sector to find and implement local solutions to social and economic development challenges. We stimulate and set the framework for the poor to strengthen their capacities and escape poverty. We do this by facilitating knowledge development, brokering, networking and advocacy at national and international level. Partnerships with other development agencies and the private sector are key to our approach.

Our advisors work in over 30 countries across five geographical regions-Asia, the Balkans, East and Southern Africa, Latin America and West and Central Africa-by providing advisory services to local organisations in seven sectors: Pro-Poor Sustainable Tourism, Renewable Energy, Water, Sanitation & Hygiene, Education, Health, Small Holder Cash Crops, and Forest Products.

## SNV & Pro-Poor Sustainable Tourism

Tourism is one of the world's largest industries. According to the World Tourism Organisation, the tourism industry is estimated at US\$ 5,890 billion, or 9.9% of the total world GDP and employed more than 22 million people in 2008. Tourism is particularly significant for developing economies, which receive an estimated 30% of global tourism expenditure.

In recent years tourism has been increasingly recognised for its potential to contribute to the reduction of poverty. Its geographical expansion and labour intensive nature support a diversification of employment and can be particularly relevant in remote and rural areas where 75% of the two billion people in extreme poverty live. Tourism is a major export sector of many developing countries, and is the primary source of foreign exchange earnings in 46 of the 50 Least Developed Countries.

Accordingly, SNV's Pro-Poor Sustainable Tourism (PPST) strategy supports actors from district, national and international levels to effectively harness tourism as a driver for job creation and local economic development to benefit the most disadvantaged communities. SNV focuses on all aspects of sustainability: economic, environmental, cultural, and institutional (good governance). SNV is currently promoting pro-poor sustainable tourism in 23 countries in Asia, the Balkans, East and Southern Africa, West and Central Africa, and Latin America.

SNV has designed its programmes across the globe to work on effective Destination Development and Management and to promote Responsible Business in Tourism.

The Destination Development and Management approach is a holistic framework for improving the long-term viability or competitiveness of a destination. In order to establish a successful, sustainable and more inclusive destination SNV pays close attention to ensuring:

- The volume of tourism is increased. Attract more tourists, lengthen the duration of their stay, repeat business, increase what is spent locally, reduce seasonality, improve return on investment and yield per visitor
- Benefits of tourism are spread over more stakeholders, particularly the poor and marginalised.
- Ensure that a balance is maintained between economic, socio-cultural and environmental impacts.

**Responsible Business in Tourism:** An important facet of Destination Development and Management is how the private sector, a crucial stakeholder, engages in the destination and produces positive impacts through its business. With recent trends towards public/private sector partnership, environmental stewardship goals, social accountability, and the popularity of corporate social responsibility principles,

Responsible Tourism has become an important means for tourism companies to ensure the long-term viability of their business by differentiating themselves from the wider market.

SNV's activities within this approach are centred on:

- Facilitating tourism businesses to set up inclusive and pro-poor supply chains and sourcing mechanisms
- Encouraging inclusive hiring practices and employee benefit programmes
- Assisting tourism businesses in fulfilling sustainable tourism certification criteria and integrating them into their operations
- Supporting tourism businesses linkup to inbound markets and businesses based on their responsible tourism products

Within the described approaches SNV pays special attention to:

### **Tourism Value Chains**

SNV uses Value Chain Development as a way to analyse how to improve participation and inclusion of marginalised people within the economy. The tourism value chain identifies the sequence of multiple and complex products and services across sectors that are delivered to tourists. This helps SNV pinpoint market-based solutions to improve opportunities and earnings for the poor. For example, local fruit and vegetable farmers can be linked to an international hotel chain, and handicraft producers can improve their design and market share.

Policy and strategy development, tourism governance

SNV collaborates closely with national, provincial and regional tourism authorities, enabling them to develop sustainable tourism. We do this at many levels: policy, legislation, regulations, planning, sustainable indicators, HR development, accreditations, and national marketing and promotion. SNV works with tourism business associations, training institutes and NGOs to improve their capacities to support tourism enterprises and local communities.

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# Foreword

There is a growing acknowledgement that the successful delivery of sustainable tourism requires responsibility on the part of all involved actors.

Responsible travel goes beyond imaginative packaging and eco-certification, beyond simplistic internal hotel policies and basic practices such as recycling paper and carbon offsetting. Rather it is more about respecting a code of ethics that enhances the social and economic well-being of host communities through making positive contributions to the conservation of natural and cultural heritage whilst providing meaningful experiences for tourists.

In 2010 SNV published a study on The Market for Responsible Tourism Products with a special focus on Latin America and Nepal. This ground-breaking study commissioned by SNV Netherlands Development Organisation and undertaken by Stanford University's Centre for Responsible Travel (CREST) revealed that. "Consumers demand authenticity, dynamic and interactive experiences, and environmentally and (to a lesser extent) socially responsible practices." At the global level, various research findings also revealed that international tourists are increasingly seeking tourism products and services that meet high socio-cultural and environmental standards. A growing group of consumers want their travel to be less invasive and more beneficial to the host community and environment. At the same time, they want to better understand the culture and realities of the places they visit. These tourists are generally well-educated and have a high level of awareness and empathy for the world they live in.

Recognizing increasing demand and the link between responsible tourism and poverty alleviation in Cambodia, SNV has identified responsible tourism as one of the key pro-poor sustainable tourism approaches to poverty alleviation and sustainable development in Cambodia. In collaboration with the Cambodia Association of Travel Agents (CATA), SNV works to strengthen the capacity of tourism businesses on the concepts of responsible business and sustainable tourism, with the ultimate goal of revealing modern, viable solutions for the challenges facing tourism businesses today.

One of the challenges facing tourism businesses in Cambodia today is the lack of access to accurate market data which they require to compete effectively in the international market. To address this challenge and to help tourism businesses in Cambodia access more information on the responsible tourist market, SNV's pro-poor sustainable tourism team conducted a study of the "**Responsible Travel Market in Cambodia**" to gain a more holistic view of responsible tourism in Cambodia through an analysis of both demand and supply side factors.

This report will prove a valuable source of information for tourism businesses and stakeholders in Cambodia allowing them to gain a competitive advantage within the responsible market and promote socially responsible and environmentally sustainable tourism practices in Cambodia and throughout the region.

Wilbert Schouten

Country Director

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# Executive Summary

Responsible travel goes beyond imaginative packaging and eco-certification, beyond basic internal hotel towel reuse policies or accommodation being located in natural jungle or forest areas. Responsible travel is an everyday code of ethics that enhances the social and economic wellbeing of host communities. It means making positive contributions to the conservation of natural and cultural heritage while providing a more meaningful experience for tourists through actively enhancing their understanding of the local cultural, social and environmental realities of the destinations visited, all the while minimising the negative economic, environmental, and social impacts that can occur at the destination. Responsible tourism has been well described as a tourism management strategy embracing planning, management, product development and marketing to bring about positive economic, social, cultural, and environmental impacts (DEAT, 2003).

With a growing global awareness of the impacts the travel industry has on its destinations and an increasing number of conscious and concerned tourists that expect tourism enterprises to carefully consider their impact on the society and environment, ethical business approaches, environmental conservation strategies, and corporate social responsibility are becoming much more common in tourism business practice (Parnwell, 2009:248). According to Chris Thompson, sustainability manager of Travelife, at least 2 out of 3 of tourists walking into a UK travel agency are looking for authentic experiences and to give something back to the local community (SNV documentary, 2009).

Tourism enterprises have become increasingly aware of the importance that positively enhancing their public image and reputation plays in a competitive marketplace. However, the trickling down of this global awareness to small private enterprise in relatively new economies, such as Cambodia, is moving more slowly. While the idea of responsible business has yet to influence most Cambodian tourism enterprises, the opportunities that such an approach to business can bring for sustainable development cannot be denied.

The purpose of this publication is to gain a more holistic view of responsible tourism in Cambodia through an analysis of demand and supply side factors. A three pronged approach to the research was undertaken. Tourist surveys at three key tourist destinations in the country were taken alongside a survey of a range of hotel and guesthouse owners/managers in the same three key tourist destinations. This was followed by in-depth discussions with local inbound tour operators in Cambodia. The results have been designed to feed into the current understanding of demand for responsible travel products in Cambodia and will inform opportunities for additional responsible tourism supply. This scoping study has initially been of direct benefit to the tour companies that participated in the Responsible Travel Cambodia programme between SNV and CATA. The results of which have been compiled in this report to inform the interested stakeholders of responsible travel in South-East Asia (Cambodia, Laos, Thailand and Vietnam), and will feed into the wider global knowledge development on responsible tourism demand and supply. .

Responsible tourists and their behaviours are complex and multi-faceted, with no easy checklist that defines the responsible traveller. Responsible tourism is rather a mirror of society; not only are people focusing on traveling more responsibly, they have embedded it through their whole life (Ray and Anderson, 2000). There are degrees of responsibility for each dimension that defines responsible tourism, and while it is unrealistic to expect tourists to exhibit all of the dimensions to the fullest extent, there will always be a minimum set of criteria that is deemed acceptable to describe a 'responsible tourist' cohort depending on the destination, its hosts and its goals. Of the tourists surveyed for this study, those who displayed the greatest concern for the consideration of responsible principles when choosing their holiday (16% of those surveyed), had an average age of 36 years and spent an average of US\$70 per day. Seventy-five percent (75%) were white collar workers with a university education (72%). Little more than half (56%) travelled independently, with 39% taking a mixture of independent and organised elements. Half of this cohort (50%) use the internet as their primary source of information and predominately travel as a couple (44%) followed by travelling with friends (26%). These characteristics are based on the high importance placed on the opportunity to interact with local people, to experience a different culture and to be challenged both physically and mentally while on holiday. Willingness to pay as a criterion to define responsible tourist markets was explored and revealed that tourists are willing to pay extra for a number of products and services that have inbuilt responsible elements. Those reporting that they were willing to pay more were found to spend approximately US\$67 per day and take predominately independent holidays (58%), with a mix of independent and organised elements (37%).

Responsible tourism makes sense. Not only does the community, customer and the environment gain from responsible tourism, but so too does the supplier. For the hotels, guesthouses and tour operators surveyed having responsible elements integrated within their business operations was important. They recognised that the principles of responsible tourism are a key aspect to their core

business operations with many either wanting to fully integrate responsible practices into their operations or wanting to upgrade and improve on their current practices.. A number of suppliers saw the integration of responsible tourism practices into their business as a competitive advantage, although others surveyed undertook this practice for more altruistic reasons.

While there is debate as to the merits of placing sole responsibility on the suppliers of the destination, it is important to also consider the tourist's commitment to contributing responsibly. While being responsible was felt to be of great importance to the suppliers surveyed, tourists to Cambodia felt that it was more marginally important to have a choice of responsible suppliers available. In terms of translating that importance into willingness to pay, the majority of tourists surveyed would be willing to pay more for a hotel or guesthouse that actively contributes to the local community or environment and for those suppliers who had an active energy and environmental policy in place.

Working with suppliers to integrate responsibility into the supply chain can benefit tour operators, suppliers, customers and above all the destination. Companies who integrate responsible practices into their operations are ensuring the inputs that go into their products remain sustainable and ethical. A significant proportion of hotel and guesthouse operators (77%) wanted the opportunity to switch towards more responsible practices. One common response was that businesses wanted to make the switch towards buying more local produce. Business to business networks, where hotels and guesthouses can better access local communities, and buy more products locally, were considered important to the hotels and guesthouses surveyed. However, international tour operators surveyed for this study showed that they either did not engage in, or rarely engaged in, working with local suppliers to improve their responsibility performance or to even to measure the sustainability performance of their suppliers. While the international operators all identify themselves as being responsible tourism operators they have no current means with which to engage with local suppliers to ensure that they are integrated within the supply chain. To close this gap, an industry led movement of providers in the supply chain working towards demonstrating to international operators not only that Cambodia recognises and certifies responsible suppliers, but it also assists them in their contracting decisions.

An important aspect of responsible tourism is the extent of the interaction with the destination, and the benefits that arise from the strength and nature of those interactions. For tourists, a number of activities were considered important in connecting them in more appropriate ways to the destination. For example learning about local culture and history, opportunities to try local cuisine, and opportunities to meet and interact with local people were all considered of high importance to them while on holiday. Furthermore, assisting local communities by providing employment and positive cultural exchanges was rated of high importance.

For suppliers, connecting to the destination means ensuring not only that their influence on the community and environment were positive, but that their guests' interaction was also positive. Many hotels and guesthouses felt that while it was important to work with local partners and to support projects that increase the community's well-being, it was also equally important to inform and educate their guests as to how they can make a positive contribution to the destination. For the international tour operators surveyed, a number of practices considered to be very important to their business which also had significant links to the destination included contributing to the protection of the destination's natural environment and cultural heritage, as well as contributing to local community development.

On a more tangible level, tour operators felt that it was very important to have contracting agreements with small and micro-enterprises, including those operated by indigenous, ethnic or minority groups, as well as links with local suppliers and subcontractors to buy local products, produce or services. Practical links to the destination such as these can provide local operators with the opportunity to integrate responsibility into the supply chain by making the local links to the destination stronger and more meaningful.

# 1. Introduction

“Any kind of tourism, mass or niche, can be damaging and therefore all tourists, mass or alternative, should be responsible” Stanford, D (2008; 262).

The nature of tourism and travel has changed much over the last 20 years. There are now a variety of holiday options on offer that contribute positively to both the host and visitor alike. In a move away from the predominately hedonistic motivations for holidays and travel, tourists today want to better understand the realities of the places they visit. An umbrella term that encompasses this new class of travel has been coined, ‘responsible tourism’, an alternative form of tourism that is based on ethics and human rights, supports community-based products and services, and involves movements such as fair trade, voluntourism, pro-poor tourism, and ecotourism.

## 1.1 Responsible Tourism

Responsible tourism is an approach to the management of tourism, aimed at maximising economic, social and environmental benefits and minimising costs to destinations. Important to this approach is that each tourism stakeholder, business as well as traveller, accepts the responsibility to focus on achieving sustainable tourism development and practice (Cape Town Declaration 2002). Managing an enterprise as a responsible company goes beyond basic practices. It is about respecting a code of ethics that enhances the social and economic well-being of host communities while making positive contributions to the conservation of natural and cultural heritage and providing more meaningful experiences for tourists.

Of the many stated benefits of responsible tourism, agreement largely centres on the following prescriptive benefits.

Responsible tourism:

- Generates greater economic benefits for local people and enhances the wellbeing of host communities, improves working conditions and access to the industry
- Involves local people in decisions that affect their lives and life chances
- Makes positive contributions to the conservation of natural and cultural heritage and to the maintenance of the world’s diversity
- Provides more enjoyable experiences for tourists through more meaningful interaction with local people and a greater understanding of local cultural, social and environmental issues
- Minimises negative economic, environmental and social impacts
- Is culturally sensitive, engenders respect between tourists and hosts and builds local pride and confidence (*Responsible Travel Handbook, 2006*).

Responsible tourism is:

- A market
- An experience
- A business practice
- A product offer

Within the responsible tourism debate, the tourist is often represented as abandoning all sense of responsibility while on holiday. Tourists are often referred to only in terms of the problems that they create, with little focus on what the tourist can do to make a positive contribution. Despite such criticisms, tourists are becoming increasingly vigilant consumers, being more receptive to the idea of taking responsibility while on holiday - a strong and growing, albeit passive, consumer demand for responsible tourism. While tourists are interested in the social, cultural and environmental issues relevant to the destinations they visit, they also want to learn about the issues both before they travel and while they are at the destination (Tearfund, 2000).

Much research over the last five years has indicated that consumers are starting to demand more responsibility from the businesses they use and tourists are demonstrating more responsible intentions. Market research by the UK relief and development organisation (Tearfund, 2001) shows that

more and more British tourists want to learn about the host country, reduce environmental impact and meet local people. And the demand for these aspects is sweeping the globe.

From a business perspective, responsible tourism has been described as a tourism management strategy embracing planning, management, product development and marketing to bring about positive economic, social, cultural, and environmental impacts (DEAT, 2003). For tourism operators and accommodation establishments, this means providing more rewarding holiday experiences for guests whilst enabling local communities to enjoy a better quality of life and conserving the destination. Where once there was just the financial bottom line, companies now recognise that accountability for their social, environmental and economic impacts represents a new triple bottom line. In subscribing to this approach, tourism businesses recognise the need to preserve the environment, to look after their workforce and to give something back to communities, while operating a profitable business. Responsible tourism does not just refer to charitable contributions, but rather to adopting open and transparent business practices that are based on ethical values that benefit not only shareholders but employees, communities and the destinations they visit. Ultimately, responsible tourism is about delivering sustainable value to society at large for the long-term benefit of all.

## **1.2 Responsible Tourism in Cambodia**

Cambodia's diverse landscape offers tourists a range of attractions and experiences, many of which are culture based and rely heavily on the country's historical monuments and rural livelihoods. In 2010 the Ministry of Tourism of the Royal Government of Cambodia registered a total of over 2.5 million arrivals to their country, 75.64% of which account for leisure travellers, others came for the purpose of business or official travel (16.75%) or to visit friends and relatives (2.9%). Among the leisure travellers visiting Cambodia, 60.54% came as free independent travellers (FIT) and 39.46% toured as group inclusive travellers (GIT)<sup>1</sup>.

Around 1 million of these travellers visited Cambodia's main attraction, the historical temples of Angkor. Interestingly, approximately 50% of these visitors visited the temples exclusively without travelling to other destinations in the country.

The Cambodian Ministry of Tourism clearly recognises that the tourism industry plays a vital role in poverty reduction through improving income and employment opportunities for the poor. Sustainable tourism development is receiving growing attention in Cambodia from both the government and the private sector, though there is a lack of knowledge and understanding of the concept or of the constraints in bringing it into practice. Tourism can only become a driving force for poverty alleviation if the forms of tourism and mechanisms for promoting tourism are given a "pro-poor" orientation.

Selected forms of alternative tourism have been initiated in Cambodia by the Government, NGO's and the private sector, such as ecotourism, community-based tourism and volunteer tourism. However, in practice these forms of tourism are limited and involve very specific niche destinations and markets. In addition, Cambodia's private sector tourism companies generally focus on short term economic benefits, without attention to business planning or marketing. With such a business approach, these companies tend to overlook longer term sociocultural, environmental and even economic impacts.

## **1.3 Objectives of the Study**

The purpose of the research was to gain a more holistic view of responsible tourism in Cambodia through an analysis of demand and supply side factors.

## **1.4 Methodology**

A three pronged approach to the research was undertaken: 1) tourist survey 2) accommodation provider survey and 3) in-depth discussions with local inbound tour operators. The survey results are intended to feed into the current understanding of demand for responsible travel products in Cambodia and will inform opportunities for additional responsible tourism supply. The results of this research will be of direct benefit to the participants of the Responsible Travel Cambodia programme between SNV and CATA and the results will be of interest to various stakeholders' interested in responsible travel in Southeast Asia (Cambodia, Laos, Vietnam and Thailand).

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<sup>1</sup> In this research, Free Independent Travellers are understood as those travellers who have flexibility in their itinerary and some degree of freedom in where they choose to travel within a destination region. Group Inclusive Travellers are understood as tourists that have pre-booked their tour, which provides them with restrictions in their choice of transportation mode, destinations visited, expressions of interest, and time budget allocations. Though neither of these are a homogeneous groups, as there are various degrees of FIT and GIT. These terms merely provide a broad classification.

Research among tourism markets and accommodation providers was undertaken during the month of December 2010, which reflects the peak tourism season in Cambodia.

#### **1.4.1 Tourist Market Surveys**

Tourist surveys were conducted in the key tourism destinations of Phnom Penh, Siem Reap and Sihanoukville to identify those market segments in Cambodia who have motivations for responsible tourism options and an awareness, behaviour and personal practice towards responsible tourism.

A total of 1200 surveys were collected during a two week period in the three destinations during December 2010 (n=400 surveys in each destination). December is the peak season for Cambodia's tourism industry, with 249,702 arrivals registered for that month in 2010. The surveys were conducted at sites commonly frequented by tourists (e.g., tourist markets, restaurants, attraction sites, beach areas). Survey respondents were selected randomly; upon encounter and willingness to participate. It should be recognised that the sample taken is not necessarily representative of the whole tourist population in Cambodia as not all representative segments were present at the selected sites or over the survey period. However, the results provide the reader with a 'snapshot' view of possible responsible tourism markets and their preferences and expectations in-country.

Results from the surveys will provide an understanding of tourists' preferences for responsible tourism products and services. The kinds of responsible practices they expect from service providers, the level of importance tourists place on those practices, how it affects their decision making, and their willingness to pay extra for responsible tourism products and services.

#### **1.4.2 Accommodation Surveys**

Interviews were conducted with various accommodation managers and owners in Phnom Penh, Siem Reap and Sihanoukville to determine their commitment to, and practice of, the principles of responsible tourism and to gain further insight into the importance of responsible business practices for their guests. Results of the surveys will inform of the degree of responsibility currently being practiced by accommodation providers in Cambodia, the importance they place on responsible tourism and the current markets they attract.

A total of 33 properties were contacted to undertake the survey (n= 33). Accommodation providers selected consisted of hotels and guesthouses of differing standards, room types and numbers. Half comprised of boutique hotels and guesthouses with the remaining half a mixture of mid-range hotels and small family-run guesthouses. The capacity of hotels ranged from 127 room five star hotels to 10 room guesthouses. The majority of properties had between 10 and 50 rooms. As a study of the responsible tourism market, there was a predisposition on the part of researchers to select those hotels and guesthouses that promote themselves as being responsible in in at least one aspect of their business operations (i.e., promotion on their website etc.

#### **1.4.3 Tour Operator Discussions**

Throughout the course of the implementation of the Responsible Travel Cambodia programme, discussions took place with local inbound tour operators, particularly operators that have a specific interest in responsible business practices. Tour operators can be defined as businesses that combine two or more travel services (e.g., transport, accommodation, catering, entertainment, and sightseeing) and sell them through travel agencies or directly to final consumers as a single product.

The results presented in this study reflect the analysis of discussions held during various workshops, meetings and events held in relation to the Responsible Travel Cambodia programme over the period September 2010 until June 2011. A quantitative analysis of the results of the tourist and accommodation provider surveys was undertaken. The results of tour operator discussions are a qualitative account of suppliers' opinions.

## 2. Profile of Responsible Tourism Markets to Cambodia

“To travel is to discover that human beings in other lands and cultures are also people with whom we can share our laughter and our tears, and that what we have in common is a great deal more than the sum of all our differences.” Silf, M. (2006:178)

The success of responsible tourism will depend on the existence of a category of tourists who are motivated to take care of the host destination through interacting with the host environment and its populace conscientiously, regardless of whether they are travelling as part of a responsible programme or in a general tourism context.

Identifying segments that are intrinsically motivated to protect the host destination is a part of a sustainable strategy. It allows the market to develop products and activities that attract these ‘responsible’ tourists. Furthermore, the existence of such a tourism segment would see responsible tourism become a byproduct that makes use of natural market forces to protect host destinations rather than emphasising a product supply side that tries to impose rules on unwilling consumers and a possibly unwilling industry, this potential impact can then be capitalised upon.

The resulting sample of the tourist surveys cannot be representative of the tourist population in Cambodia as a whole. Therefore, analysis will involve examining a sample of tourists visiting Cambodia over the survey period and to consider their ‘level of responsibility’, including their awareness of, behaviour towards, and personal practice of responsible tourism. In doing so it is possible to categorise those tourists who are more inclined towards the concept of responsible tourism.

### 2.2 Tourist Profile

#### 2.2.1 Demographics

Of the total number of tourists surveyed, 89.5% primarily travelled to Cambodia for a holiday, with the average length of stay being 11 to 12 days. The majority travelled either as a couple (44%) or with friends (26%), with only 14% travelling alone. The largest age group of respondents surveyed was between 25 and 35 years of age (39%), with less than 25 years of age the second largest age bracket (26%). Of those surveyed 51% were female. Seventy-two percent of respondents were classified as white collar workers, with non-income the next highest (24%); indicating either students or retirees.

Education levels of respondents were predominately university level (75%). These demographics seem to match the general profile that has been generated from other research around the globe. For instance, SNV’s market research in Latin America and Nepal showed that the profiles of the responsible travellers from Europe and North America are similar in various ways: “They tend to be well educated, include all age groups (with greater concentrations among youths and retirees), are equally divided between men and women, have higher than average amounts of disposable income, come mostly from urban areas, and travel beyond major cities.” (SNV, 2009: 37).

The largest source markets surveyed came from Western and Eastern Europe (56%) with North American (17%) and Australasia (13%) markets the second and third largest respectively. Other markets surveyed included Scandinavian (5.9%), Asian (North/East Asia and Southern Asia) (3.1%), South America (2.5%), ASEAN (1.3%) and Africa and the Middle East (1.6%). As with random sampling, the relatively small sample size, time and locations of surveying have forced the classification of source markets into the above categories. It should be acknowledged the sample is not representative of the overall classifications of tourists as registered by the Ministry of Tourism. According to Ministry of Tourism data, the main travel markets for Cambodia in 2010 were: Vietnam 18.61%, Republic of Korea 11.55%, China 7.08%, Japan 6.05%, United States of America 5.82%, France 4.52%, The United Kingdom 4.11%, Thailand 3.84%, Australia 3.73% and Taiwan, China 3.64%. Thus, a comparison between this study and the Ministry figures to show the study’s market representation is not recommended.

#### 2.2.2 Purchasing and Travel Behaviour

Almost 58% of respondents took holidays that were classified as independent, with almost 37% of respondents having holidays that comprised of a mixture of independent and organised elements. Generally, those aspects arranged dependently (i.e., those arranged by a travel agent or similar) included long haul airline tickets (25%), accommodation (18%), short haul air tickets (16%) and

tours/activities (12%). Specifically, for their trip to Cambodia, those aspects of their holiday organised independently were accommodation (17%), meals/restaurants (17%), local transportation (15%) and local tours and activities (15%).

The Internet was the primary source of information for researching their holiday, with guidebooks and word of mouth rating second and third. It was observed that many independent travellers in South East Asia brought internet enabled devices (e.g., i-pad, phone, laptop etc.) as a convenient way to communicate with home and explore travel options while at the destination. More and more cafés, restaurants and accommodation respond to this trend by offering free Wi-Fi to attract these potential customers.

Respondents' average daily budget was US\$67 per day. Accommodation was the largest budget item with an average spend of US\$25 per day, with shopping the second biggest budget item (US\$18 per day). Meals and drinks (US\$16), guides (US\$16), and excursions (US\$16) were priced equally across the groupings.

**Table 1: Average Daily Spend of Group Types**

<b>Budget Item</b>	<b>Independent</b>	<b>Independent with Organised Elements</b>	<b>Package</b>
Total Daily Spend	\$ 62	\$ 76	\$ 63
Accommodation	\$ 24	\$ 30	\$ 11
Meals and drinks	\$ 15	\$ 18	\$ 14
Transport (between towns)	\$ 11	\$ 13	\$ 11
Transport (within a town)	\$ 6	\$ 8	\$ 5
Guides	\$ 13	\$ 20	\$ 12
Entrance fees	\$ 13	\$ 14	\$ 10
Excursions	\$ 12	\$ 20	\$ 14
Spa/massage	\$ 8	\$ 8	\$ 7
Shopping	\$ 19	\$ 16	\$ 18

The Northern provinces of Siem Reap, Odder Meanchey and Preah Vihear were the most popular destination (35%), with Phnom Penh (29%), and the south western provinces of Koh Kong, Kompong Speu, Kampot and Sihanoukville (21%), being the second and third most popular destinations to visit. It should be noted that although the northern provinces of Preah Vihear and Oddar Meanchey are included, visitors mainly concentrate at the popular destination of Siem Reap with Preah Vihear and Oddar Meanchey having low visitation levels). The same is true for the southern provinces of Kompong Speu and Kampot as higher numbers of visitors will be found in Sihanoukville.

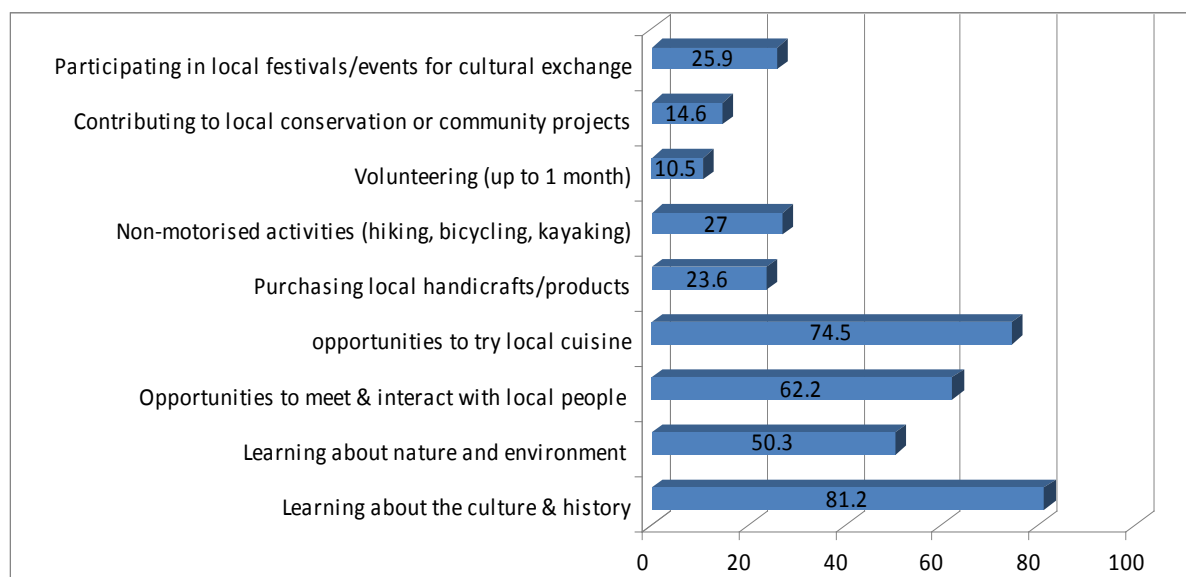
The kinds of activities respondents experienced during their trip to Cambodia were grouped under the broader headings of cultural, natural, heritage products and recreational activities. The most popular cultural products consumed or experienced included handicrafts (40%), music and dance (35%) and local economic activities such as farming or fishing (29%). The nature based products most popular with respondents included lakes, rivers, waterfalls (59%), forests (33%) and coastal areas (26%). Those heritage products which rated highest in popularity included historical temples (89%), museums (57%), and archaeological sites (45%). The highest reported recreational activities respondents listed as having experienced while on holiday in Cambodia included boating (28%), cycling (22%), hiking (16%), guided walking (15%) and wildlife viewing (14%).

### 2.2.3 Level of Interest in Responsible-Type Activities

A study of ethical tourism by Mintel (2001) found that the majority surveyed were apathetic toward ethical issues while on holiday; being more concerned with standards of accommodation and the weather. Some 40% of those surveyed stated that when on holiday they just want to relax and not be bothered with ethical issues. However, Mintel stresses that this is not to say that key groups of ethical tourists do not exist. From their survey they found that 7% had sought a holiday with an ethical code of practice, while 4% changed their plans due to issues with responsibility.

Tourists were asked a series of questions to gauge their interest in particular types of activities while on holiday. Their level of interest was rated on a Likert scale from 'high interest' to 'no interest'. The three types of activities that scored the highest level of interest by respondents were all of a cultural nature and included learning about the culture and history (81%), opportunities to try local cuisine (74%) and opportunities to meet and interact with local people (62%). Learning about nature and environment was also a common response by respondents (50%).

Figure 1: High Level Importance Ratings for Particular Holiday Activities



There were a number of activities in which responses recorded were of medium importance. Participating in local festivals or events for cultural exchange (42%), purchasing local handicrafts/products (40%), and participation in non-motorised activities (44%) (e.g., hiking, bicycling, and kayaking).

On the lower end of the scale, contributing to local conservation or community projects scored a medium to low level of interest (76%). The activity with the lowest levels of interest was short-term volunteering with 68% scoring it of low to no interest.

### 2.3 Holiday Decision Making

Results of the Tearfund (2000) survey revealed that those aspects considered to be of key concern when choosing a holiday were cost, weather, and quality of facilities, even though the same respondents showed concern about ethical policies and environmental considerations in their holiday decision making process. Results from the Cambodian survey mirrored the Tearfund survey and a number of similar surveys of tourist decision making (Goodwin and Francis, 2003; Keynote, 2002; Goodwin, 2001). The Cambodian survey revealed that 90% of respondents rated the cost of their holiday as being of medium to high importance. The weather or climate also rated as being of medium to high importance (84%).

Respondents were asked of the level of importance in the availability of a certain attraction (e.g., beach, snow, temples, mountains etc.) when choosing a holiday. Fifty-nine percent (59%) of tourists surveyed rated this aspect of holiday choice of high importance, with a combined total of 93.6% of respondents saying it was of medium to high importance.



The extent of concern for ethical policies saw 42% of respondents reporting that booking with companies with ethical practices was of medium importance to them. In examining services influencing holiday decision choices, respondents were asked about the importance of the availability of nightlife, bars, live entertainment, clubs etc. Of those surveyed, 39% gave these activities a low importance rating, with 70% of respondents rating them of low to no importance. Furthermore, the availability of a range of shopping choices received a 48% rating of low importance, with 79% rating this activity of low to no importance.

Holiday decision making sees a higher level of importance placed on certain activities and experiences. The opportunity to interact with local people or the opportunity to experience a different culture was of high importance to the majority of respondents (58%), with 93% rating this from medium to high importance. Those respondents wanting to get away from the 'tourist trail' on their holiday felt that it was of medium importance (47%), with 82% rating this of medium to high importance. Finally, the importance of an opportunity to challenge oneself physically and mentally received a balanced response with a medium level of importance placed on this opportunity (45%), 26% of respondents feeling it was of high importance and 24% feeling it was of low importance.

## 2.4 Expectations of Accommodation Providers and Tour Operators

Tourists were asked to give five examples of the things that they expected from tour operators and/or accommodation establishments when they were on holiday. The question did not specifically ask about the responsible practices of suppliers, even though it was contained within the survey on responsible tourism and surprisingly no respondents replied with expectations of responsibility. It can be inferred that while tourists are interested in ethics and responsible tourism their level of commitment is either not translated into purchasing practice or those tourists who are truly responsible are in the minority. A British study conducted in 2001 found that 'ethically aware'<sup>2</sup> tourists constituted only 11% of the study population (Intel, 2001). Another aspect that complicates information on this topic is that while many consumer surveys of intention show a strong willingness to practice the principles of responsible tourism, few have measured actual consumer practices or the level of their commitment.

Good service was ranked the number one expectation (40%) by respondents. Equally ranked at second were cleanliness, hygiene and the availability of information on the destination and its attractions (12%). Placed third were expectations of friendliness, hospitality and value for money (10%).

## 2.5 Importance in Decision Making

Tourists to Cambodia were asked a series of questions regarding those aspects that can influence their choice of accommodation provider or tour operator. The level of importance afforded by respondents was rated on a Likert scale from 'high importance' to 'no importance'.

There was little differentiation in the reported levels of importance between high and medium. While the results show a moderately even distribution of responses between high and medium levels of importance, their combined scores still places particular criteria of higher importance to respondents. These include:

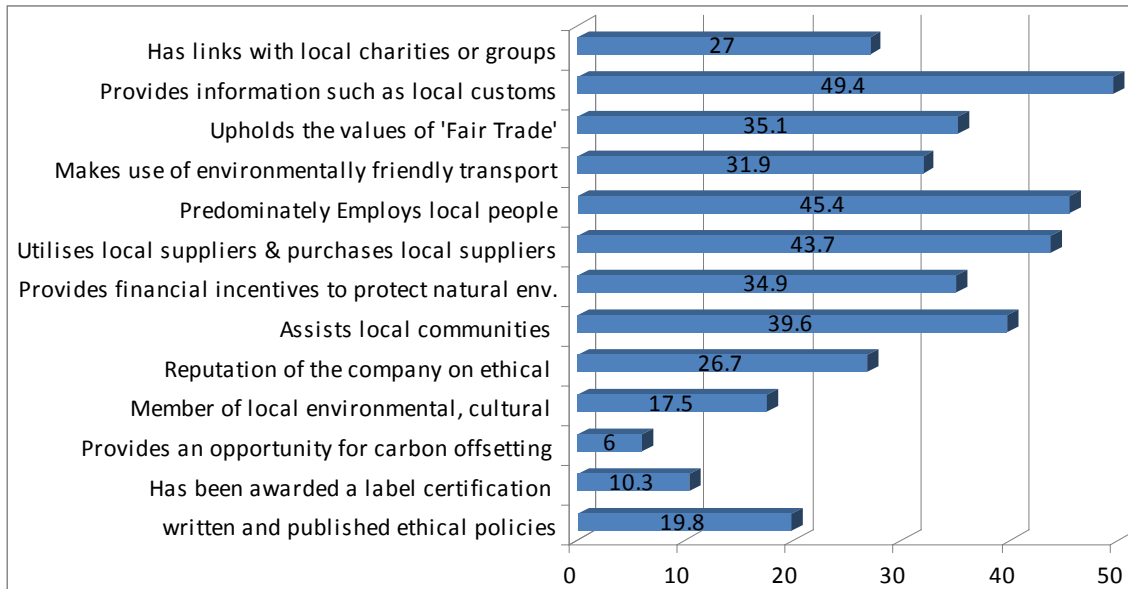
- Utilising local suppliers and purchasing local supplies where possible (44% high importance, 42% medium importance)
- Predominately employing local people in all aspects of business (45% high importance, 40% medium importance)
- Providing information to guests on local customs and etiquette, environmental and heritage preservation issues etc. (49% high importance, 38% medium importance)
- Assisting local communities by providing employment and positive cultural exchanges (40% high importance, 46% medium importance).

Environmentally responsible criteria rated predominately as of medium importance to respondents and included providing financial incentives to protect natural environments (47%), being certified by an environmental organisation (i.e., Green Globe) (46%), being a member of a local environmental, cultural or community group (47%), and making use of environmentally friendly transport options such as bicycles (45%).

Figure 2: High Level Importance Ratings for Supplier Responsible Practices

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<sup>2</sup> 'Ethically aware' tourists are described as most concerned with ethical issues when on holiday, including the impact their holiday has on the local environment. This cluster of tourists are the most likely to have sought a holiday with an ethical code of practice, and tends to feel that tourism can ruin the local culture.



Those socially responsible related aspects that predominately rated as of medium importance included the supplier upholding the values of 'Fair Trade' (46%), having links with local charities or groups (45%), the reputation of the company on ethical or sustainability issues (52%), and having written and published ethical policies (52%). The only criterion to register a predominately low level of importance to respondents was companies providing the opportunity for carbon offsetting of their holiday (46%).

## 2.6 Willingness to Pay

The holiday decision making phase is an interaction of a number of trade-offs which forces a potential tourist to decide how important certain components of a trip are to them. One indirect measure of such importance is the willingness to pay. Up to 30% of the tourists are interested in responsible tourism but not willing to pay more money for these holidays (UNWTO, 2009).

In terms of paying a higher price for goods and services, the most common response (78%) was the willingness to pay for an experienced guide from the local community. For those willing to pay extra, the cost of the guide would increase by an average of 30%. This translates as an extra \$3 for a local guide already charging \$10 for their services.

While the majority of tourists surveyed (76%) were willing to pay \$3 more for every US\$20 spent on a tour that contributed to a community or environmental project (15% extra in addition to the price), less were willing to pay for a tour operator with ethical and sustainable practices in the destination (60%). The willingness to pay extra translates as an additional 5% on a \$500 tour package.

For accommodation providers willing to practice responsible tourism, respondents said they would be willing to pay more for a hotel or guesthouse that actively contributed to the local community or environment (68%) or for a hotel or guesthouse with an active energy and environmental policy (63%). This means an additional \$5 extra for a \$50 per night room.

Of the tourists surveyed, 67% were willing to pay a higher price for local products or souvenirs that were purchased under fair trade practices or labels. Respondents were willing to spend an extra \$2 for every \$10 spent on a souvenir or local product, representing a 20% increase on the base price. For local producers and artisans, this can represent significant benefits.

Only half of the respondents (52%) were willing to pay extra for volunteering with an organisation or project, or for offsetting the carbon footprint of their airfare. For those who would volunteer for an organisation, respondents said they would pay an extra 10% to the amount they were already paying to the organisation for volunteering. In terms of offsetting their holiday carbon footprint, respondents were only willing to pay an extra \$40 for every \$1000 spent on the airfare.

### **3. Responsible Accommodation Providers in Cambodia**

Hoteliers around the world are recognising that responsible environmental and social practices translate into benefits for business, the environment and the community. From providing cost savings, to reputation benefits, to ensuring the long-term appeal of a destination; good environmental and social practices make good business sense. Equally, publicity about poor practices may damage a hotel or guesthouse's reputation leading to a loss of business.

#### **3.1 Business Characteristics**

The thirty three businesses surveyed had been operating anywhere between one and eighteen years, with five years being the average length of operation. Of the total hotel and guesthouse owners or managers surveyed, their top five markets were, in descending order, the US, UK, Australia, Germany and France. When asked if the operators had observed any changes or shifts in their top five markets over the past three years there was an even response of yes and no. For those accommodation providers who had noticed changes to their markets, the most common response was an increase in the family market and less in the backpacker market. Other market changes noted included an increasing number of wealthier middle aged tourists, an increase in the couples market and longer overall stays by guests. Changes in specific country markets were not taken into account as these could simply be a reflection of the world economic crisis in the last three years rather than an absolute shift in origin markets.

Hotels and guesthouses were asked for a breakdown of direct bookings, walk-ins, and bookings from tour operators or travel agents for their top five markets. For their top five markets, the primary method of booking was to book directly either by phone, email or internet. For US, UK and French markets, the second most preferred method of booking was through a travel agent or tour operator. For Australian markets, there was an even split between utilising travel agents or tour operators and walking in. However, for German markets walk-in was their second preferred method of booking.

When asked which web booking sites they were listed on, the most common response was their own website (29%), with Asia Rooms and Booking.com equal second (13%). Of the websites they are listed on, respondents were asked which sites proved to be the most successful (on average) in generating bookings. Again, the majority of respondents claimed that their own website (76%) generated the most bookings. The second most common response was Trip Advisor (14%) with Asia Rooms (10%) rating third. When asked how guests heard about their hotel or guesthouse, the most common response was word of mouth (31%). Information and recommendations by friends and family (22%) was the next most popular, information found on the internet (18%) was third, with travel guides (14%) the fourth most common response.

#### **3.2 Responsible Guests**

Hotel and guesthouse owners and managers were queried about several aspects pertaining to their general awareness and practice of responsible tourism, and the influence these practices may have had on their guests. Respondents were asked if they were aware whether any of their guests were interested in their responsible tourism practices, for example, guests emailing to ask questions about their responsible tourism related operating practices, or enquiries about volunteering opportunities. Most respondents (59%) reported that they rarely received enquiries, the remainder said that they never received enquiries. For those that did receive enquiries, volunteering was the most popular request, specifically environment or community projects, followed by working for Non-Government Organisations. When asked approximately what percentage of their yearly bookings enquired about responsible tourism practices, the response was an average of 38% of yearly bookings. Those markets which enquired the most about responsible tourism practices included general markets from Europe (no specific country of origin details were given), followed by Australian, US, French, British and German markets.

A general trend within the industry is for tourists to be more likely to patronise hotels with a 'responsible environmental attitude' (Honey, 2005; Tearfund, 2001). However, guests are less proactive in their actual efforts in seeking out these responsible suppliers. A study on consumer attitudes towards the role of hotels in environmental sustainability found only 14% of US markets and 26% of Australians surveyed actually asked hotels if they had an environmental policy. Furthermore, not a single British tourist surveyed spoke to the hotel about their policies (IHEI, 2002).

When asked whether guests discussed or encouraged their business to implement responsible tourism practices, a negative majority response (68%) was recorded. For those whose guests responded positively, the most common kinds of practices they had discussed with accommodation

providers were practices to stop or prevent child trafficking and practices to reduce environmental damage to the destination. To address the gap between guests' interest in responsible tourism and their efforts in actively seeking out providers with responsible tourism elements hotels or guesthouse operators can inform their guests of these practices and the positive impact that they have on the destination.

To address this issue hotels and guesthouses were asked whether they motivated their guests to be responsible while staying with them or while on holiday in Cambodia. Sixty seven percent (67%) of respondents said that they motivated their guests to be more responsible tourists. The most common responses included encouraging guests to support local businesses, providing information on places to go and specifically who guests can help and how, encouraging the saving of electricity, promoting the Childsafe initiative, and informing tourists of personal behaviours that are more conducive to the destination's culture.

Hotel and guesthouse operators were asked whether their guests were interested in any particular types of activities. The most common responses were learning about the culture and history, and opportunities to try local cuisine (88%). Of similar frequency were opportunities to meet and interact with local people and to specifically purchase locally made handicrafts/products (82%). Learning about nature and the environment also rated highly (70%). Those activities rated of less interest to guests included contributing to local conservation or community projects (58%), participating in local festivals or events for cultural exchanges (55%), and short-term volunteering (45%).

### **3.3 Responsible Business Practice**

When recommending tours, products, services, shops, activities, companies etc. to their guests, respondents were asked on what they based their recommendations, to understand if their decision to recommend was based on responsible principles or general principles. The most common recommendation was based on it being in the best location. Encouragingly, the second most common response was the services contribution to protecting or improving the local community or environment. Further responses showed a mix of quality and responsibility principles including a good reputation with the local industry, whether it is locally made, produced or owned, and whether it is one respondents used personally.

Hotel and guesthouse operators were asked if they would like to switch towards more sustainable or responsible practices. The majority of respondents (77%) stated they would like to make the switch. For those who responded positively, the kinds of activities or practices they would like to make were the switch to solar energy, improved waste management, buying more local produce and recycling.

When asked what would encourage them to make the switch, the most common response was access to information about sustainable practices and having a greater awareness of the practices so that they can implement them. Financial support in the form of incentives and grants were regarded as equally important for making the switch to more responsible practices. Business to business connections, where hotels and guesthouses were able to have better access to local communities and farmers in order to buy more local products was also considered important. Respondents also commented on a number of external influences on their business that were critical in assisting them to make the switch. The most common was having the time available to make the changes, searching out the information, training staff, implementing, following up and monitoring. Again, when asked whether they would need support and in what form, ideas and knowledge were the most sought after, followed by advice and greater awareness. From whom they saw that support coming, the majority stated the government, with NGOs and experts the next most common response.

Looking at the types of responsible practices that are important to hotel and guesthouse managers or owners, respondents were asked about the importance of having responsible social, cultural and/or environmental policies in place. Of those surveyed, 66% rated this criterion of high importance, with 33% rating it of medium importance. The level of importance given by respondents in obtaining sustainable or responsible-type certificates, for example the Green Globe or ECPAT Code of Conduct, was evenly spread across the responses, from low importance (31%), to medium importance (25%) and high importance (31%). Respondents rated being a member of a local environmental, cultural or community group or organisation as being predominately of medium (42%) to high importance (39%), while hotels and guesthouses contributing financially to the protection of natural environments and cultural heritage was considered to be predominately of medium importance (50%). Finally, utilising local suppliers and being able to purchase locally grown, supplies was considered of high importance (53%) to accommodation providers.

Accommodation providers were asked a series of questions pertaining to the kinds of responsible practices they engage in as a business. The two most common responses were to regularly monitor water and energy consumption and to work with employees to practice saving water and energy (equally 88%). As these two responses can be equally associated with either cost savings or environmental impact, it is difficult to ascertain the primary reasons for undertaking these practices. The next most common response (85%) was for businesses to establish policies and guidelines to protect employees' health and safety in the workplace. Other areas where it was difficult to distinguish whether these practices were for cost savings rather than minimising their carbon footprint were the regular monitoring and servicing of all equipment to ensure it is running efficiently as possible (79%), installing energy saving equipment such as energy saving light bulbs (76%), and providing guests with tips about reducing their water and energy consumption (70%).

One aspect however that required some effort that did not necessarily translate into cost savings to the business that rated high amongst accommodation providers was providing guests with information on local customs and etiquette, environmental or heritage preservation issues and useful local language phrases etc. (76%).

Other common responsible practices undertaken by hotels and guesthouses included informing and educating guests as to how they can make a positive contribution to the destination (67%), working with local partners to support projects that increase community well-being (61%) and installing water-saving devices such as low-flush toilets, low-flow shower heads etc. (61%).

Those practices requiring greater effort and commitment, rated lower on the engagement scale. Those responsible practices rarely or infrequently undertaken included encouraging staff to become involved in volunteer projects (45%), making financial or in-kind contributions to local conservation, cultural or social projects (42%), reusing treated grey water for washing floors, flushing toilets and watering gardens (30%), composting organic wastes such as food scraps, leaves and tree cuttings (30%), and installing a waste recycling bio digester (9%).

### **3.4 Above and Beyond**

Those businesses already engaged in responsible tourism-type practices were asked an additional range of questions pertaining to their current practices. Hotel and guesthouse owners were asked these additional questions if they had answered yes to undertaking more than 50% of the listed practices in Question 14. Of the 33 accommodation providers interviewed, half answered these further questions (n=17).

Hotel and guesthouse managers or owners were asked if there were additional activities they carried out as part of the business operations aside from the practices already covered in the survey. For those who answered positively, the most common response was to support environment or community projects, with hiring local staff, and recycling (e.g., cans, bottles etc.) also common responses.

Hotels and guesthouse owners or managers were asked which areas they would like to add to or improve on their current practice of responsible tourism. The most common response was improving on their environmental impact, followed by recycling and waste management, all of which have positive environmental benefits.

When asking respondents why they decided to engage in responsible tourism practices, the most common response was the cost savings it produced for the business, followed by moral, ethical or personal reasons for reducing reduce their footprint on the environment. The practices they initially started with predominately included reducing energy consumption, followed by supporting community projects or working with communities, reducing water consumption and recycling.

While the majority felt that the challenges of implementing responsible practices into their business operations were not insurmountable, the challenges that still existed concerned issues with staff (taking the time to train staff, staff not understanding or caring, and general staff awareness), the cost of implementing practices, and the availability of certain technologies in Cambodia. In terms of successes, brand recognition by customers has been cited as the most common success resulting from implementing responsible practices into business operations. Reducing energy and water consumption were also rated high on the list of successes achieved. Benefits arising from the implementation of responsible practices have included staff feeling more empowered to be responsible in their daily work, communities benefiting from their responsible actions, and brand recognition by tourists themselves. In terms of negatives, respondents cited the cost involved with implementation in the short term.

When asked how the Cambodian Hotels Association could become involved, respondents felt that providing advice and disseminating information on responsible tourism practices was of most

importance, followed by training or capacity building in techniques and practices. Awards and certification was also felt to be of value.

In terms of marketing and promoting responsible tourism in Cambodia most respondents were unsure of how this could be best achieved effectively. Networking opportunities were cited as an important tool for the promotion of responsible businesses, with caution by some respondents that all marketing and promotional efforts of responsible businesses should be subtle to avoid the perception of 'greenwashing'<sup>3</sup> by hotels and guesthouses.

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<sup>3</sup> Greenwashing - when a company or organisation spends more time and money claiming to be "green" through advertising and marketing than actually implementing business practices that minimize environmental impact. Source: EnviroMedia Social Marketing & the University of Oregon. <http://www.greenwashingindex.com/what.php>

## 4. Responsible Tour Operations in Cambodia

A tour operator is among the most influential stakeholders in the tourism value chain, as it stands at the heart of the tourism industry (Pro Poor Tourism Partnership 2004, Sigala 2008). The role of the tour operator is to act as intermediary in the tourism distribution system, linking products and consumers. Tour operators form a powerful player in accomplishing responsible industry strategies as they can facilitate pro-poor supply chains and sourcing mechanisms, as well as encourage tourists' choice of inclusive destinations, products and services. They can take on the role of influencing other stakeholders they are working with, stimulating them to adopt and choose responsible business practices.

As markets increasingly liberalise, private enterprises ultimately hold the key to sustainable tourism development (Parnwell, 2009:248). The private sector, at various levels and scales, is able to take advantage of resources, support and infrastructure that are provided by other stakeholders, while delivering a strong commitment to sustainability, by acting in an ethically responsible and self-regulatory manner (De Lacy et al., 2002:8).

### 4.1 Responding to the Market

Research has highlighted that responsible travellers tend to have a higher educational and social grade (Mintel 2007, SNV 2010). Increasingly tourists are looking to interact with local people and to try local cuisine and tour operators stress that these are key reasons in their clients selecting Cambodia as a destination. Tour operators also reported that tourists commonly require more information about the destination, particularly the culture and whether the company utilised local products and services before they purchased tours.

The tour operators' experience of Cambodia is as an add-on destination with most of their clients interested in combining a holiday to Thailand or Vietnam with a visit to Angkor Wat. In part this is also a result of a declining number of tourists travelling as group inclusive travellers (5%). Approximately 58% of respondents classified their holiday as independent, with almost 37% of respondents taking holidays that comprised a mixture of independent and organised elements.

Similarly, report from the Ministry of Tourism 2009-2010 showed that there is an increase in number of free independent travellers (FIT) with 60.54% of total visitors arriving Cambodia in 2010 falling into this category. 39.46% are group inclusive traveller (GIT) while in 2009 FIT accounted for only 48.96% with GIT at 51.04%.

Discussions with tour operators revealed that in response to the growing market demand and to harness the competitive advantages of a commitment to responsible tourism practices, it was important for their businesses to consider the following:

- Contributing to the protection of the natural environment and cultural heritage
- Contributing to local economic development
- Upholding the values of universal human rights at the destination, including the code against the commercial sexual exploitation of children;
- Having contracting agreements with small and micro-enterprises, including those operated by indigenous, ethnic or minority groups
- Linking with local suppliers and subcontractors to purchase locally grown or produced products.

Tour operators' most commonly undertaken responsible practices included, consciously informing and educating customers as to how they can make a positive contribution to the destination during their holiday, providing clients with local information on local customs and etiquette, and working with local partners to support projects that increase the wellbeing of the host community.

Those practices that businesses either did not engage in or rarely engaged in included working with suppliers to improve and measure their sustainability performance, and establishing policies and guidelines to protect employees' health and safety in the workplace.

The perception of the Cambodia Association of Travel Agents (CATA) is that responsible tourism has been applied by some tour operators in Cambodia already, with many of them doing it successfully. However, not all operators include responsible tourism elements in their products. Seeing this challenge, CATA would like to promote responsible tourism to all businesses, and particularly tour operators, in Cambodia.

It is not only tour operators who see the benefits of responsible business operation. The accommodation industry is also aware of the increasing demand for responsible products. According to discussions with several hotels in Cambodia, it was found that there was an increase in bookings from free independent travellers looking for accommodation providers with responsible practices. The general manager of the Intercontinental Hotel in Phnom Penh said during the National Conference on Responsible Tourism in Phnom Penh in September 2010 that "In 10 years, anyone who does not practice responsible tourism business will be out of business. Responsible Tourism is something that can be practiced by any company. It is not only about washing sheets once per week or replacing batteries, it goes far beyond that."

## **4.2 Responsible Business Operations**

Much research has been undertaken concerning the tour operator's position with respect to responsible tourism and whether they are undertaking the practice for either ethical or market differentiation reasons (Key Note, 2008; Honey, 2005; Ipsos MORI, 2002). Responsible tourism is one aspect that allows tour operators to compete on more than just price. Recognising that brand awareness counts in an ever expanding effort to attract the customer their responsible tourism commitment is an 'added value' that may secure additional bookings. Often it has been stated that where there is little to choose between competing holidays and trips, the responsible tourism aspects of a particular trip may provide a competitive advantage (Honey, 2005; Weeden, 2002; Tearfund, 2001). Much of this research has found that while the high importance of destination, price, services and departure date remain similar over a range of large, medium and small operators, in the view of tour operators themselves, those operators practising responsible tourism have the edge each time.

Through the use of responsible tourism as a business practice, operators endeavour to create points of difference; unique selling points between their products and those of their competitors. Responsible tourism practices add value through product differentiation and increased quality, as well as by preventing the degradation of the foundation of the tourism experience i.e., the host destination. Where the responsible tourism elements make for a superior product it will attract consumers predisposed to purchase responsible products (Francis & Goodwin, 2003; Tearfund, 2001).

Tourism enterprises are becoming increasingly aware of the importance of their public image and reputation as a basis for remaining competitive. In relatively new economies, such as Cambodia, the trickling down of this global awareness to local private enterprises is moving more gradually. While the idea of responsible travel is still emerging among Cambodia tourism enterprises, the opportunities that such an approach to business can bring for the sustainable development of the enterprise and tourism industry cannot be denied.

Some tour operators in Cambodia still find responsible practices a challenge and that means, that for the time being, that responsible tourism may be more about striking the right balance. Key to the difficulties that tour operators face in implementing responsible practices or pro-poor tourism strategies themselves, is that they operate through the 'supply chain' and have limited direct control over activities or initiatives undertaken by local companies.

Tour operators are able to offer highly competitive prices to their customers because of their ability to bulk-buy supplies at low cost. For local suppliers (e.g., hoteliers, excursion providers), the high volume and relative security of contracts from tour operators is attractive. However, the need to secure these contracts and operate at low prices can make it difficult for local providers to invest in a differentiated product or allocate extra resources to pro-poor commitments. The reliance of the larger operators and their local staff on earnings from excursion programmes can create conflict with other suppliers – often poor producers – of sightseeing and activities (Pro Poor Tourism Partnership 2004). Small operators have a less dramatic influence on tourism volumes, but can still importantly affect the path of development by putting a new destination or product type on the map. Their products' value is usually created through a high concentration of local encounters and cultural experiences.

Each tour company is different and responsible actions should be tailored to the individual opportunities that can be found in each enterprise. For instance, depending on local infrastructure or the relative cost of technology, some actions will be relevant in some areas and not in others. A company should adopt a flexible approach according to their destinations and the size of their business.

## **4.3 International Networking**

As a result of an increasing demand for tourism products and services that meet high socio-cultural and environmental standards, a growing number of large international tour operators aim to offer products



to this market. "According to a global study by the UK Federation of Tour Operators, 70% of international tour operators consider 'sustainable' and 'responsible' tourism important to the quality of experience they are able to offer their customers." (Travelife, 2008). These international tour operators are looking to partner with local enterprises that promote comparable business management. This creates new opportunities for business links and differentiation in the increasingly competitive tourism industry.

The Cambodian Ministry of Tourism clearly recognises the importance and benefits of responsible tourism and strongly encourages tourism businesses to act responsibly. However, there is still a lack of knowledge and understanding of the concepts as well as a list of constraints towards bringing them into practice. Through the discussion with tour operators during the First National Conference on Responsible Tourism in Phnom Penh in 2010, tour operators wishing to practice and promote responsible tourism reported facing several challenges. Among these are a lack of information about responsible tourism products, limited knowledge of responsible suppliers, lack of access to responsible buyers, difficulties in pricing responsible products competitively, quality of products and services, perceived security concerns at the destinations, and difficulties faced in building connections and trust between tour operators and communities.

Selected forms of alternative tourism have been initiated in Cambodia by the government, NGOs and the private sector. Ecotourism, community based tourism and volunteer tourism exist but are limited and involve specific niche destinations and markets. This is compounded by international tour operators' limited awareness of these projects.

According to a review of 30 international tour operators' websites from the UK, US, Netherlands, Australia and Asia offering tours to Cambodia, it was found that 85% of the tour itineraries to Cambodia are classic tours focusing on 'comfortable' trips rather than adventure activities. 10% of the reviewed tour itineraries were for adventure tours that included forest trekking and adventure biking. Only 5% of the itineraries were volunteer tours or community tours including homestay or opportunities to explore the lifestyles of local people.

Approximately 60% of the tour operators reviewed promoted both single itinerary and cross countries itineraries that included a visit to Cambodia alongside visits to Thailand, Laos and Vietnam. Another 40% of tour operators promote only cross country itineraries with very few tour companies promoting Cambodia as a single destination.

Among both cross-countries and Cambodia only itineraries, 71% of tour itineraries reviewed included visits to Siem Reap and Phnom Penh with 20% including coastal zones such as Kep, Kampot and Sihanoukville. Only 9% of reviewed itineraries included visits to the northeast region or other provinces in Cambodia.

The average length of a visit to Cambodia promoted by reviewed tour operators was 5.5 days. The length of special voluntary tours to Cambodia was longer at 10 to 30 days. The average length of cross-countries visits was 16.7 days. The price for a Cambodia only itinerary was between USD 300 and USD 3000, depending on the level of comfort, service standard and length of stay. For Cambodia as part of a cross country itinerary, the price ranged from USD 1000 to USD 6000.

## 5. Dimensions of Responsible Tourism in Cambodia

There is a globally growing trend for tourists to seek out unique environments, to interact with vastly different cultures and to understand more about the places they visit while on holiday. They patronise suppliers who are committed to the destination, increasingly viewing environmental and social stewardship as a responsibility of the businesses they support. Most believe that tour operators and travel agents have a responsibility to provide pertinent information on a wide range of issues - both before they go on holiday and once they are there (Tearfund, 2000). At the same time, tour operators are beginning to respond to these changing consumer attitudes. Where once there was just the financial bottom line, companies now recognise they must be accountable for their social, environmental and economic impacts - the triple bottom line. They recognise the need to preserve the environment, support their hosts and give something back to the destination, all while running a profitable business. This approach is referred to as responsible or sustainable tourism. It is about designing tourism programs and individual trips carefully, to provide tourists with the experience they seek, while leaving a positive footprint at the destination.

Consumers purchase holidays for a myriad of reasons coalescing at the moment of decision. A number of studies have shown that consumer choice is constrained by price and availability, with the responsible elements of a product only part of the motivation to purchase (Honey, 2005; ABTA, 2004; Weeden, 2002). Despite this, a small and slowly emerging trend worldwide is the willingness of consumers to positively choose, and pay a premium for, responsible products and services (Tearfund, 2000). Often the question is asked, to what extent do tourists really want more ethical tourism products, and are they willing to pay more for them? This is a key question influencing the pace at which the tourism industry adopts more responsible practices. But it is a question on which there is conflicting data from a number of market research studies, the conclusion being that ethical concerns are increasing, although active concern still remains a minority interest.

### 5.1 A Responsible Tourist Profile

Responsible tourists and their behaviours are complex and multi-faceted, with no easy checklist that defines the responsible traveller. There are degrees of responsibility for each dimension that defines responsible tourism, and while it is unrealistic to expect tourists to exhibit all of the dimensions to the fullest extent, there will always be a minimum set of criteria that is deemed acceptable for the description of a responsible tourist cohort depending on the destination, its hosts and its goals. Of the tourists surveyed for this study, the following description is a general overview of the type of tourist to Cambodia with respect to the degree to which they exhibit responsible tourist characteristics. In order to make a generalised summary of a responsible tourist cohort, an analysis of the data was made with regard to specific questions in the survey that demonstrated responsible principles. Country of origin was not considered within the profile, as the survey sample was too small to gain any definitive insights into source markets.

When making a decision on holiday options consumers can opt for the cost of the holiday or the weather at the destination as being of most importance to them. While it has been shown that cost and weather are the key factors both in this study and others (Honey, 2005; Tearfund, 2001), other factors with responsible principles can also be of high importance to consumers. For those respondents who displayed a consideration of responsible principles when choosing their holiday (16% of those surveyed) the following characteristics applied: an average age of 36 years, with an average spend of US\$70 per day. Seventy five percent (75%) were white collar workers with a university education (72%). A little more than half (56%) travel independently, with 39% a mixture of independent and organised. Half of this cohort (50%) utilised the internet as their primary source of information and predominately travelled as a couple (45%). These characteristics are based on those respondents placing a high importance on the opportunity to interact with local people and experience a different culture and to be challenged both physically and mentally while on holiday. This cohort also felt that it was very important to book their holiday with companies who demonstrated ethical practices.

For those hotels, guesthouses and tour operators either currently engaged in responsible tourism or wishing to make the switch to more responsible practices, a general profile of those tourists who rate a supplier's commitment as being of high importance (11% of those surveyed) is as follows: the average age is 35 years, with an average spend of US\$69 per day. Seventy four percent (74%) were white collar workers, with a university education (69%). Slightly more than half (58%) travel independently, with 37% choosing a mixture of independent and organised elements. Half of this cohort (50%) utilise the Internet as their primary source of information, and predominately travel as a couple (53%).

Another means by which it is possible to distinguish responsible tourists from the general tourist population is by the level of interest they have in activities. While not a key indicator of a tourist's level of commitment to the principles of responsible tourism there is consensus that a responsible tourist

should be active rather than passive. A list of activities considered to possess high levels of engagement and interaction were given to respondents, to gauge their level of interest. Those who responded with a high level of interest and were considered to have a high level of interaction with and awareness of the destination and its hosts, had the following profile (18% of those surveyed): an average age of 33 years, with 70% being white collar workers with a university education (72%). Their average daily spend was US\$63, predominately undertaking independent holidays (58%), with 36% taking a mixture of independent and organised elements, and travelling typically as a couple (45%). The Internet is the primary source of information (52%) followed by guidebooks and word of mouth.

Willingness to pay has been used as a criterion to define responsible tourist markets, as it implicitly accounts for the trade-off that suggests that responsibility comes at a price. One important aspect of willingness to pay is that although consumers are beginning to show an attitude change towards paying more for responsible tourism products and services, the amounts that are recorded usually represent how consumers would like to behave and not necessarily how they will actually behave when booking holidays. Despite this, for those respondents willing to pay extra for a number of products and services that have inbuilt responsible elements, the following characteristics applied (47% of those surveyed): This cohort were predominately white-collar workers (75%) with a university education (76%), and had an average age of 33 years. They spent approximately US\$67 per day and take predominately independent holidays (58%), with a mix of independent and organised elements (37%). The internet was the primary source of information (53%) followed by guidebooks, with the majority travelling as a couple (46%) followed by travelling with friends.

## **5.2 Does Being a Responsible Supplier Matter?**

Responsible tourism makes sense for companies. Not only does the community, customer and the environment gain from responsible tourism, but so too does the supplier. Many tour operators are already undertaking responsible tourism practices, such as giving money to local organisations or charities or contracting with responsible suppliers. However, these actions are often implemented informally and may be limited to the manager or a few staff members in a company. As such there is much debate as to the obligation of all parties contributing to the wellbeing of a destination, with the act of being responsible often falling back on the supplier. Research conducted by Weeden (2002) revealed growing consumer expectations of suppliers to provide products which are economically, socially and environmentally responsible. The current disjunction between consumer expectations and consumer willingness to pay for those expectations has been an ongoing dilemma for many suppliers in the industry. Weeden found that consumers will pay a greater premium according to what they can afford, with their priority for purchasing ethical products pitted against the more traditional criteria for choosing a holiday. The smaller the premium for a responsible product the more likely consumers are to purchase it.

For the hotels, guesthouses and tour operators surveyed, having responsible elements integrated within their business operations was of importance to them. They recognised the principles of responsible tourism as a key aspect of their core business operations, with many either wanting to fully integrate responsible practices into their operations, or wanting to upgrade and improve on their current practices. Of those practices important to hotels and guesthouses, having responsible social, cultural and/or environmental policies in place was rated as being of high importance to them (66%). Similarly, for inbound tour operators, having responsible tourism policies in place was considered of high importance (80%).

This was not only viewed as part of their intrinsic values, suppliers were also proactive in ensuring that their guests also acted responsibly whilst on holiday. A large proportion of hotels, guesthouses and inbound tour operators encouraged their guests to be more responsible, citing information and awareness as the key medium. A predominate number of hotels and guesthouses surveyed said they motivated their guests to be more responsible by encouraging them to support local businesses, providing information on places to go and specifically who their guests can help and how, encouraging the reduction of electricity consumption, promoting the Childsafe initiative, and informing tourists of behaviours more conducive to the destination and its culture.

While a number of suppliers saw the integration of responsible tourism practices into their business as a competitive advantage, others undertook this practice for more altruistic reasons. Morals and ethics were the key reason for suppliers engaging in responsible tourism practices; this also incorporated the desire by suppliers to reduce their environmental footprint. Those hotels, guesthouses and tour operators with responsible policies already integrated into their businesses saw the added advantage of such policies being a successful business tactic to gain an advantage over competitors. Brand recognition by customers was cited by these suppliers as the most common benefit of implementing responsible tourism into their business operations.

Half of the suppliers surveyed felt responsible tourism practices were not only integral to the nature of their business, but engaged in these practices - going above and beyond what could be described as 'greenwashing'. Most of the hotels and guesthouses began their responsible tourism journey with simple practices of reducing energy and water consumption, supporting community or environmental projects, and recycling. For these suppliers adding to, or improving on, their current practice was the desired goal to work towards. Improving their current environmental impact was of most concern to suppliers and wanting to improve their recycling efforts and their waste management practices were of highest priority.

While there is debate as to the merits of placing sole responsibility on the suppliers of the destination, it is important to also consider the tourist's commitment to contributing responsibly. While being responsible was felt to be of great importance to the suppliers surveyed, tourists to Cambodia felt that it was more marginally important to have a choice of responsible suppliers available. Providing them with information on the destination, such as local customs and etiquette, was important to them, as was the supplier having written and published ethical policies. In terms of translating that importance into willingness to pay, the majority of tourists surveyed would be willing to pay more for a hotel or guesthouse that actively contributes to the local community or environment and to those suppliers who had an active energy and environmental policy in place. While evidence suggests that many consumers would be more likely to patronise a tourism company with ethical or responsible policies, translating this into practice reveals that very few customers proactively ask their suppliers about the social, environmental or economic policies of the company or issues at the destination (Honey, 2005).

### **5.3 Supply Chain Linkages**

Working with suppliers to integrate responsibility into the supply chain can benefit tour operators, suppliers, customers and above all the destination. Companies who integrate responsible practices into their operations are ensuring the inputs that go into their products remain sustainable and ethical. For tour operators, who offer contracted goods and services, an effective responsible tourism policy with suppliers will work towards improving the responsibility performance of all components of their packaged product. Time and resource constraints often inhibit inbound operators from adopting responsible or sustainable policies throughout their supply chain at the myriad of destinations to which they send their customers. Assistance from local operators can go some way to bridging this gap in the supply chain and bring about a greater demand for more responsible practices by inbound operators.

To be successful, responsible tourism actions need to be at the core of the business and integrated throughout the supply chain. This means a systematic application of business ethics to all operations. A series of steps is needed for companies to be able to create and effectively implement a responsible supply chain policy and management system that will enable them to operate a profitable business while being confident that the business practices they engage in are responsible and contribute positively to the destination and to the industry. To complete the responsible supply chain, tourism businesses can integrate economic, environmental and social responsibility criteria into their choice of service suppliers and contracts with those suppliers.

A significant proportion of hotel and guesthouse operators (77%) wanted the opportunity to be able to switch towards more responsible practices in their business operations. One common response was that businesses wanted to make the switch towards buying more local produce. Business to business networks, where hotels and guesthouses can better access local communities and farmers or suppliers to buy more products locally, were considered important to the hotels and guesthouses surveyed. Furthermore, when asked about the types of responsible practices that were important half of the respondents considered it of high importance to utilise local suppliers and purchase locally grown, produced or manufactured supplies when possible. To make the case for purchasing more locally to the broader tourism industry, particularly accommodation and restaurant businesses, tourists also felt that it was important for hotels or guesthouses to utilise local suppliers and purchase local supplies where possible.

International tour operators surveyed for this study showed that they either did not engage in, or rarely engaged in, working with local suppliers to improve their responsibility performance, or to even measure the sustainability performance of their suppliers. While the international operators all identify themselves as being responsible tourism operators they have no current means with which to engage with local suppliers to ensure responsibility and sustainability are integrated into the supply chain. To close this gap, an industry-led movement of providers in the supply chain is needed. This movement would work towards demonstrating to international operators that not only does Cambodia recognise and certify responsible suppliers, but is also able to assist them in their contracting decisions.

A company's economic practices (i.e., purchasing behaviour, business relationships) will have a substantial impact on the local economy. Those businesses engaged in responsible tourism practices

should try to minimise the revenue that leaks out of the destination by employing and purchasing locally, but more importantly by setting up business relationships with local people that will help to create employment, stimulate entrepreneurial activity, increase investment and boost the overall standard of living of local communities. These business relationships can take the form of joint ventures, partnerships and other types of business linkages that can exist as formal contractual partnerships or simple business agreements.

## **5.4 Connecting to the Destination**

According to the Cape Town Declaration, responsible tourism minimises negative and maximises positive impacts in environmental, social, cultural and economic contexts, involves local people and enhances communities, contributes to conservation, and engenders respect and connections between hosts and guest. An important aspect to this definition is the extent of the connection to the destination, and the benefits that arise from the strength and nature of those connections. The question forthcoming is how connecting to the destination through the environment or community is important and who benefits - suppliers, the destination or the tourists themselves?

For tourists, a number of activities were considered important in connecting them in more appropriate ways to the destination. For example, learning about culture and history, opportunities to try local cuisine, and opportunities to meet and interact with local people were all considered of high importance to them while on holiday. The opportunity to interact with local people and experience a different culture also rated of high importance to them, as did assisting local communities by providing employment and positive cultural exchanges. Not only on a community level but on a local environmental level, respondents wanted to connect to the destination by providing financial incentives that protect natural environments or cultural heritage. For those suppliers wanting to show greater connection to the destination, being a member of a local environmental, cultural or community group as well as having links with local charities or groups was seen as a positive contribution.

To gauge the level of motivation by tourists in making beneficial connections to the destination, the respondent's willingness to pay more for products and services was examined. In a number of studies, it was found that consumers' general willingness to pay extra for tourism goods or services was on average between 5% and 10% (Honey, 2005). Surveys revealed few products and services where the willingness to pay was greater than 10% of the average price. Seventy eight percent of respondents were willing to pay an additional 30% for a local tour guide, 76% of respondents were willing to pay an extra 15% in addition to the base price of a tour that contributed to a community or environmental project. Similarly, 67% were willing to pay a higher price for local products or souvenirs purchased under fair trade practices; representing a 20% increase in the price of an item. For local producers and artisans, this can represent significant benefits. It also reinforces the evidence that tourists wish to create greater connections with the destinations that they visit.

For suppliers, connecting to the destination means ensuring that not only their influence on the community and environment are positive, but so is that of their guests. Many hotels and guesthouses felt that while it was important to work with local partners at the destination to support projects that increase the community's well-being, it was also equally important to inform and educate their guests as to how they can make a positive contribution to the destination. An aspect that is often overlooked with suppliers is the impact that their staff can also make on the destination by encouraging them to become involved in volunteer projects. While less than half of the hotels and guesthouses surveyed encouraged their staff to become involved, a minority recognised the benefits of involving their staff in responsible tourism practices, stating that in doing so it has empowered their staff to be more proactive in their daily work and lives.

For the international tour operators surveyed, a number of practices were considered to be very important to their business which had links to the destination included contributing to the protection of the destination's natural environment and cultural heritage, as well as contributing to local community development. On a more tangible level, tour operators felt that it was very important to have contracting agreements with small and micro-enterprises, including those operated by indigenous, ethnic or minority groups, as well as links with local suppliers and subcontractors to buy local products, produce or services. Practical links to the destination such as these can provide local operators with the opportunity to integrate responsibility into the supply chain by making the local links to the destination stronger and more meaningful. Respect for local communities and support for social development are integral to the practice of responsible tourism. Setting up genuine cooperative structures with staff and local people helps to improve the quality of life of the hosts, ultimately leading to mutual benefits. Equally, the tour operators' commitment to the destination through their clients was also of high importance. Specifically, respondents claimed that they consciously inform and educate their customers as to how they can make a positive contribution to the destination during their holiday by providing them with information such as local customs & etiquette, environmental & heritage preservation issues, useful local language phrases etc.

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