CONSUMER SEGMENTATION FAIR TRADE TOURISM: SWEDEN

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1. INTRODUCTION / BACKGROUND

Fair Trade and sustainability are both buzzwords in today's society and the demand among European consumers in fairly traded products is on a steady rise. Despite the recent economic downturn, global consumption of Fairtrade products amounted to €4,9 billion in 2011, an increase of 12% on the previous year. Six out of ten consumers globally believe that their choices can make a difference to local farmers and workers in poorer countries (Fairtrade International, 2011).

In Sweden, Fairtrade consumption reached record-levels in 2012 with total sales of Fairtrade-certified goods reaching 1,5 billion SEK (ca €180 million), an increase by 28% from 2011 (Fairtrade Sverige, 2013). This can be attributed to the fact that there have been dedicated information campaigns that have resulted in a high degree of consumer awareness around ethical products and the concept of sustainability, and demand is growing among consumers.

The concept of responsible or sustainable *tourism* is still in the early stages of product development. A majority of consumers globally state that they would "purchase more products that are environmentally and socially responsible", if they "performed as well as, or better than, products they usually buy" (Globescan, 2012).

Quality and price are vital ingredients for the growth of the sector. These, together with availability and awareness, are key factors that will require focused attention from suppliers to enable sustainable tourism to follow the growth path that Fairtrade has. While the interest is there, it is necessary to address these issues on a broader level and work actively to identify the key target groups, in order to harness the market potential.

Research has established that an interesting segment for sustainable tourism does exist. According to a study on demand for sustainable tourism conducted by Hochschule Luzern for the World Tourism Forum in Lucerne 2011, co-sponsored by Kuoni, one in five respondents in eight countries (Brazil, Germany, India, Russia, Sweden, Switzerland, Great Britain and USA) rank sustainability among the top-three influencing factors when booking a holiday. In Sweden, the share is about 15% (Hochschule Luzern / Kuoni, 2011).

Similarly, several travel trend reports suggest that sustainable tourism will become increasingly important to consumers in the future. In a global survey conducted by Kuoni (Kuoni Holiday Report 2011), consumers from 12 markets featured sustainability and eco-tourism among the top-five future travel trends, suggesting a greater sense of responsibility lay on the traveller to contribute or make a difference when visiting other countries. This trend is prominent in the Swedish market, where Kuoni's holidaymakers consider sustainability (46%) and eco-tourism (45%) as being the two most important travel trends for the next ten years (Kuoni Sweden / Apollo, Holiday Report 2011).

2. METHODOLOGY

The purpose of this report is to explore the Swedish context and to provide an overview of the potential for sustainable and Fair Travel in this market by suggesting key consumer profiles to focus on. The study was done primarily through desktop research, combining existing data from the tourism industry and tourism research field with data on ethical / Fairtrade consumption and consumer segmentations on general and Swedish long haul travel.

An attitude-based segmentation model for pro-environmental behaviour developed by the UK Department for Environment, Food & Rural Affairs (Defra) was used as a framework to segment consumers.

3. ASSUMPTIONS

The following basic assumptions were made:

- Consumer segmentation is mainly based on *differences in attitudes* and not demographics;
- The *degree of social consciousness* the person possesses and how it translates to buying behaviour constitutes the key attitudinal differentiation;
- *Education and worldliness* are seen as determining factors for social consciousness;
- Disposable income does not necessarily impact attitude, but will determine the type of product consumed; and
- The segments which have no history whatsoever of ethical consumption were excluded.

4. THE SEGMENTATION FRAMEWORK

In Defra's segmentation model of general pro-environmental behaviours (2008), three segments were found to have relevance when investigating the possible demand for responsible tourism in the European and Swedish context:

Segment:	General Description:
1. Cautious Participants:	They are aware of environmental issues and fair trade. They care about their own personal consumption. They are likely to be recycling at home and act with the environment in mind, but they do not go out of their way to find fair and sustainable products.

2. Concerned Consumers:	Are conscious consumers that actively look for sustainable, environmentally friendly options when shopping and consuming. Should there be a choice between a non-sustainable product and a sustainable one, they will actively choose to buy the sustainable one.
3. Positive Greens:	This is the most affluent and best educated segment. Positive Greens are well-researched and well-versed on technical issues of sustainability and will ensure that the majority of their consumption is sustainable. They are also most likely to buy ethical and local products including local food and fair trade.

In terms of the willingness to act and change to a more pro-environmental behaviour, **Cautious Participants** are the less active segment. While they display a willingness to do more, they are dependent on others acting first (role-models), and, only once the behaviour become the norm, will they act.

The second segment, the **Concerned Consumers**, have less conviction and are less active in their environmental beliefs than the Positive Greens segment. It is important to note, however, that being pro-environmental fits with their self-identification (image) and, as such, they are willing to do more, at least in some areas.

The third group, **Positive Greens**, are already active with strong pro-environmental beliefs and a high willingness and potential to do more. It is likely that success in encouraging this stronger segment to do more, may influence the other two segments to adopt more environmentally friendly behaviours.

4.1. Responsible Traveller Segments

Defra's research indicates that higher education and income levels are associated to the more socially aware consumer segments. These segments are the highest consumers of sustainable products and are thus the ones that need to be the target of marketing efforts for sustainable and responsible tourism.

The links between education, income and sustainability awareness are demonstrated in Sweden by findings by several stakeholders and institutions. For example the organic food label KRAV, which indicates that their prime customers tend to be well-educated (KRAV, 2012). Sweden's population has among the highest education levels in the international context. According to the Swedish National Agency of Higher Education, 34% of Sweden's population between 25-64 years has a higher education, which is more than the OECD average of 31% (Högskoleverket, 2012).

In terms of awareness, Globescan data shows that Swedes have an above-average understanding of the impact of their consumption and that they are thus more socially and sustainably aware than other markets. Furthermore, Fairtrade in Sweden has identified that the degree of knowledge of Swedish consumers of their products is well above the global average, and the level of recognition has increased in the past few years.

Hochschule Luzern and Kuoni have found that the more sustainable aware holidaymakers are more educated and found in the higher income brackets. Sweden, with a higher than average degree of educated individuals and relatively high income levels, has more sustainably aware and active consumers and therefore can be found to constitute an interesting market for sustainable tourism.

Using the Defra segmentation as a base - due to the link on education, income and social awareness - we can infer the following relevant segments of responsible travellers:

Sustainable Beginners is derived from Defra's Cautious Participants - they are familiar with the concept of sustainability and would consider a sustainable holiday if it is on a par with a non-sustainable option in terms of quality and price. Not a leader segment, but will follow others' actions. Access to sustainable holiday options must be made as easy as possible and the benefits explained in detail.

RT Segment:	**General description:**
"Sustainable Beginners":	*"I do a couple of things to help the environment. I'd really like to do more… well, as long as I saw others doing it"*. Sustainable-aware but relatively passive segment that may consider sustainable travel options. Their willingness to act is however largely depending on others acting first. Considers travel to be a reward in life which they would like to allow themselves without any sense of guilt. Aware of the problem with carbon footprint of long haul flights, but see compensation more as an additional travel expense rather than their own responsibility. Price sensitive segment, would consider a sustainable travel option if it met all their needs and came at a similar price as the non-sustainable option.

Active Sustainable Consumers is based on the Concerned Consumers in Defra's model; experienced travellers who are socially and environmentally concerned consumers at home. They are likely to consider a sustainable holiday option and are aware of the social condition of responsible tourism - which should be the focus of communication towards this group.

RT Segment:	**General description:**
"Active Sustainable Consumers":	*"I think I do a more than a lot of people. Still, going away is important, and I would find that hard to give up so I try to find ways to compensate for the negative impact to feel better "*. These are active and conscious consumers who considers travel an essential part of life. Would continue with the green behaviour on holiday and may consider using carbon offsetting programmes to deal with the concern about carbon footprint of long haul flights. Aware and sensitive to the conditions and responsible treatment of staff at tourist destinations.

Sustainable Pioneers comes from Defra's Positive Green segment; this is a group of very conscious consumers who would actively look for good causes to support. A leader segment that would potentially inspire the other two groups to choose a sustainable option.

RT Segment:	General description:
"Sustainable Pioneers":	*"I have a responsibility to do as much as possible to limit my impact on the environment"*. Travel is a fundamental part of life for this segment and they travel to broaden their horizons, learn about the world and expand their knowledge. They seek an educational experience where they are exposed to new things and new frontiers. Leaders in sustainable behaviour at home and on holiday and can be considered the quintessential pioneers.

5. SECONDARY DATA DISCUSSION

5.1. Overview: Swedish long-haul tourism and demand for South Africa as a Destination

With the ninth highest per capita personal disposable income in the world and 25 legislated annual leave days per year (at least), Sweden is considered an attractive tourism market for long-haul travel.

Sweden ranks amongst the top-20 outbound markets and long-haul markets in the world. Nearly three quarters of the Swedish population go on vacation every year, with 18% of their trips to development countries (Swedish Chamber of Commerce, 2011). In 2011, the number of Swedish outbound trips with overnight stays grew by 12% compared to the previous year, reaching a total of 14,6 million trips for business and leisure trips combined (Tillväxtverket, 2011).

For South Africa, Sweden is ranked among the top-ten long-haul markets, reaching 40,856 arrivals in 2012, an increase by 5,4% from 2011 (South African Tourism monthly arrival statistics, Dec 2012).

Six in ten Swedish travellers visit South Africa primarily for leisure, with business travel being the next most common and fastest growing purpose (20%). June to September are the principal holiday months for Swedish leisure tourism within Europe. For destinations outside of Europe, December and October are the most popular months (Swedish Chamber of Commerce, 2011).

In the case of South Africa, arrivals from Sweden are the highest in the peak month of December, with a difference of over 5,000 recorded between December and August (South African Tourism, 2010).

Key data - Swedish travellers to South Africa:	
Age distribution:	23% are between 25-34 years 20% between 35-44 years 18% between 45-54 years 18% between 55-64 years
Gender distribution:	Males comprise a majority of Swedish travellers to SA (67%), and their proportion increased during 2003-2008
Income:	The proportion of high income earners >R40000 per month from Swe to SA significantly increased during 2003-2008 (45% 2008 from 28% 2007)
Visited South Africa before?	More than 60% are first-time visitors About 20% have visited 2-3 times before
Purpose of visit:	About 60% are leisure visitors More than 35% are business visitors and this group of travel has been growing
Length of stay:	The length of stay for a majority of Swedish tourists to South Africa is about 2 weeks

(South African Tourism, Market Overview Sweden, TUR 2013 & Marketing South Africa in Sweden, 2010)

Visiting natural attractions and safari/wildlife experiences are the most common activities of Swedish leisure visitors to South Africa. When asked about the main reasons for satisfaction with their visit, a majority mentioned specifically the scenic beauty, followed by wildlife and safari and the friendly and hospitable people (South African Tourism, 2010). From a demand point-of-view, these positive experiences link up with the good value for money offered for Swedes (the exchange rate of the Swedish Krona to the South African rand is currently very favourable) as well as the pleasant weather/climate at the destination, which is the most important reason why Swedes choose to travel abroad.

Accessibility is the primary barrier for tourism growth out of Sweden due to the fact that there are no direct flights to South Africa out of Sweden or Scandinavia. This limits accessibility and leads to a comparative disadvantage vis-à-vis the main competitors. Another barrier is the issues of security and the perception of crime, linked to an often biased media coverage and general prejudice about Africa. This is exacerbated by a general lack of knowledge about South Africa as a tourist destination among both consumers and tour operators - also possibly limiting growth as they play an important role in holiday-makers choice of destinations.

Internet usage in Sweden is among the highest in the world. The booking of tourism services via internet is becoming more and more popular, especially for short-haul travel, as travellers are becoming increasingly confident and are used to booking their trips online.

Today, a majority (62%) of all trips in Sweden are booked on the internet, according to Swedish consumer travel magazine Vagabond (Vagabond Resebarometer, 2012) and it is likely that the share will continue to grow. For countries such as South Africa, the complexity of the destination should mean that the expertise and support of tour operators will continue to be in demand. Long-term, however, there may be some change as consumers become more familiar with the destination and we start seeing more repeat visitors.

5.2. Overview - Traveller Profiles

A lack of available consumer data and profiles for the Swedish travel market has been a limitation for this report. Very little open data on behaviour-based consumer profiles has been found in the Swedish context. The following two data sources have been identified as relevant and are discussed below.

South African Tourism works with two core traveller segments, consisting of one younger and one older group, which form the basis of the organisation's global marketing campaigns in the international leisure markets (SAT, Marketing Tourism Growth Strategy for South Africa 2011-2013):

SAT Core Segment	General Description:
1. "Wanderluster":	The "Wanderluster" segment is made up of younger singles or couples between the **ages of 25 and 40** who generally do not have children. They are young urban professionals earning **higher incomes**, and they already have considerable travel experience. Their desired experience centres on nature, culture and adventure with a strong liking for "urban vibe". While also concerned with issues of safety and comfort, these consumers are driven more by the emotional appeal of a destination compared to the more practical NSSAs. They are generally more positive about South Africa in every market than any other segment but they also want to travel the world.
2. "Next Stop South Africa" (NSSA):	The NSSA segment represents the traditional market for South African Tourism. They are **wealthier experienced international travellers**, usually between the **ages of 40 and 60** whose children (if any) have left home. They typically look for natural beauty and authentic cultural experiences. They prefer independent or small group travel, and look for luxury and comfort as part of their experience. Safety is a key consideration when choosing a new destination. Safari is a big draw-card when travelling to Africa.

The Australian destination marketing body, **Tourism Queensland,** recently carried out a detailed segmentation study of the Swedish long haul traveller market. This study provides some interesting findings that are also applicable to the South African context. Within the Swedish population, the TQ study identified 1,3 million long haul travellers (18% of the adult population), and within this long haul market the following six distinct consumer segments were revealed:

1. Self-Challengers (11%)
2. Independent Travellers (16%)
3. Activity Seekers (19%)
4. Family Focus (11%)
5. Comfort and Learning (31%)
6. Safe and Unwind (12%)

Of these six segments, the **Self-Challengers, Independent Travellers and Activity Seekers** (representing a market of some 600,000 travellers) were found to be the main targets and could also be relevant for South Africa. These segments are attractive because they travel frequently, have above-average holiday expenditure and desire new and challenging experiences.

A summary of the key characteristics of the segments are featured in the following profiles:

PRIMARY TARGET MARKETS:

<table>
<tr><td colspan="3">SELF-CHALLENGERS: 11% of the population
Travel is a big part of their lives. They like to immerse themselves in the local culture, language and lifestyle. Holidays provide a sense of adventure, an opportunity to test themselves, to satisfy their curiosity and grow. They are happy to drive around independently or to use local transport. Self-Challengers like to visit countries before they are discovered by too many ‘tourists’ – the unknown is part of the adventure.</td></tr>
<tr><td>Profile:
• Tend to be fluent in English
• More likely to travel alone
• More likely to travel for a longer period
• Prefer to stay in moderate to low priced accommodation (budget hotels, backpackers, B&B’s and lodges)
• Medium spenders</td><td>Trip planning:
• They start planning and booking flights one to three months in advance
• More likely to plan the entire trip on their own and book their accommodation as they go – therefore are more open to using travel guides for sourcing accommodation</td><td>Holiday activities:
Self-Challengers want to participate in significantly more activities including:
• Engaging with and living like the locals
• Engaging with indigenous communities
• Exploring the back streets
• Visiting friends
• Activities where they can learn more about themselves
• Doing community work
• Working holidays</td></tr>
<tr><td colspan="3">INDEPENDENT TRAVELLERS: 16% of the population
Independent Travellers prefer to plan their own holidays and like to travel around and explore the destination autonomously. They tend to reject ‘touristy areas’, however want to see the major sites and landmarks. They are keen to learn some of the local language and to blend in with the locals.</td></tr>
<tr><td>Profile:
• Intermediate to fluent English
• More likely to be older (45 years +)
• Tend to take longer holidays, but less often
• Prefer to stay in moderate or budget style accommodation
• Medium to high spenders</td><td>Trip planning:
• Tend to plan their trip one to six months in advance
• They are more likely to plan their own trip and book accommodation whilst travelling
• They tend to use the following sources when planning their trip: travel magazines or programs; travel guides or books; local tourist embassies; and advice from family or friends</td><td>Holiday activities:
Independent Travellers enjoy activities that allow them to engage with the cultural and/or natural environment including visiting historical places, national parks, seeing the wildlife and meeting the locals. They like being active and energetic.</td></tr>
</table>

SECONDARY TARGET MARKET:

ACTIVITY SEEKERS: 19% of the population *Travel plays an important role in an Activity Seeker's life; it may be a treat or a chance to learn something about themselves. They are confident travelling to new and different places and stepping into the unknown is part of the adventure. Activity Seekers are keen to experience things that are rare and special, however will shop around for the best holiday deals available.*		
Profile: • Intermediate to fluent English • More likely to be under 35 years of age • Mostly travel with their partner • Tend to travel for one to three weeks • Prefer to stay in moderate or luxury hotels • Medium spenders	**Trip planning:** • Tend to plan and book their trip one to six months in advance • Travel on packages that are customised to their needs • They are more likely to use the following sources when planning their trip: internet travel sites, newspapers and magazines	**Holiday activities:** Activity Seekers are keen to undertake many and varied activities while on holiday. Further, they are more likely to visit beaches, go shopping, visit local markets, relax by the pool, experience the nightlife, go diving and snorkelling

(Tourism Queensland, The Swedish Traveller: A segmentation of the Swedish market)

Self-Challengers and Independent Travellers want to be active while on holiday and to feel alive, enriched, sociable and carefree. They enjoy exploring new cultures and meeting new people and regard holidays as a chance to stimulate their senses, to challenge themselves and have an adventure. They are confident travellers and very keen to get off the beaten track, to fully explore the area and immerse themselves in the local culture. These consumers are entertained and engaged by the natural environment and prefer their holiday destinations to be largely undiscovered.

Activity Seekers want fun and exciting holidays where they can experience something rare and different; they want to participate in as many activities as possible while seeing the world. Having the freedom to choose which activities they partake in is important, so they do not want to be locked into fully planned, package tours. These consumers are interested in undertaking a number of activities and experiences that are both physically challenging and exciting. It is important that they are unique experiences that they can tell their friends and family about. Activity Seekers also like to balance their activities with rest and relaxation, so they will spend time relaxing on the beach or by the pool during their holiday in order to re-charge their batteries. While Activity Seekers are interested in 'going off the beaten track', they do tend to stay in and around main tourism 'hubs' where there is easy access to a large number of activities or tours within a short distance to keep them entertained.

5.3. Overview - Demand for Ethical Products and Sustainable Tourism (Swedish context)

The support for sustainability is growing stronger both on a global level and within the Swedish market. We are starting to see higher expectations and pressure from consumers on companies to take an active social responsibility. A survey conducted by Globescan for Fair Trade International indicated that more than 80% of global consumers believe that companies should contribute actively towards improving the working conditions for staff, protecting the environment and promoting social development in their source markets. 65% of Swedish consumers (above average) understand that their buying decisions can impact both producers and staff in the developing countries that they source from (Globescan Consumer Survey, 2011).

Among Swedish certification labels, Fairtrade and KRAV are the most well-known, followed by the Nordic Swan label. Fairtrade was established in Sweden in the late 1980s and Fairtrade-certified products have been available to Swedish consumers since 1996. Presently there are approximately 1,600 certified products available on the Swedish shelves and sales are growing fast. So fast, in fact, that sales reached 1,5 billion SEK in 2012, a 28% increase from 2011.

The Fairtrade label is now recognised by 76% of Swedish consumers, which is well above the global average. In the past few years, the degree of knowledge has increased among consumers, especially those from the big cities (Stockholm, Göteborg and Malmö). Confidence and positive attitude towards fair trade labels is particularly prevalent among female consumers (Fairtrade Sweden / TNS-Sifo, 2013).

The market for organic products has continued to grow in Sweden in 2012, at a slower pace than before. Total sales increase was estimated at three percent in 2012, corresponding to a value of 9,5 billion SEK (ca € 1,1 billion). The Swedish organic label KRAV reports that 93% of Swedes consume KRAV-labelled products (20% often, 47% sometimes and 26% seldom), with only 5% not buying KRAV-labelled products at all. KRAV has identified their consumers as being mainly women, mainly younger and mainly well-educated. The geographic spread is fairly good with 34% of often-consumers living in the three big city areas; 29% living in urban areas with more than 40,000 inhabitants, and 38 percent living in the countryside (KRAV Market Report 2013).

Concurrent with this development in general demand, Swedish holidaymakers are becoming increasingly interested in the concept of sustainable tourism. They perceive this as a way to actively limit the impact of their travel on both the environment and local people, and the market stands out when looked at in the global context.

This development is reflected in a number of reports on future tourism trends. A consumer survey by Kuoni / Apollo Sweden predicts that sustainable tourism (45%) will be the most important travel trend for Swedish travellers in the next ten years.

Eco-tourism (43%) was listed as the second most important trend and social responsibility featured in fourth place (31%) (Kuoni Holiday Report 2011).

According to a study on attitudes and demand for sustainable tourism, commissioned by Kuoni International, one in five tourists rank sustainability among the top three influencing factors when booking a holiday. These "sustainability-aware" tourists are generally well-educated and fall into a high income bracket, making them the most important target group for sustainable travel (Hochschule Luzern / Kuoni 2011).

The study furthermore indicates that the most important factor Swedes look at when booking their holiday is the weather and climate of the destination. The Nordic winters are long and cold and the tough climate makes people want to escape to warmer shores. Price is the second most important factor, followed by accessibility, food and landscape.

From a Swedish perspective, sustainability only appears in seventh place, which is still relatively low in comparison to the previous discussion around general awareness and interest in the topic.

Although sustainability does not rank very highly in the decision-making process, sustainability is among the top three influencing factors for 15% of the respondents, indicating that the issue is still of importance (Hochschule Luzern / Kuoni 2011). In terms of the various dimensions of the sustainability concept, Swedish travellers are found to be primarily interested in the advancement of fair working conditions (63%), the conservation of natural habitats (62%) and environmentally and socially responsible development (59%) at the destination (TUI, 2011).

This predisposition creates consumer expectations and demands on companies to take social responsibility in their business practices. A large number of the big Swedish retail companies, e.g. Coop, Åhléns and IKEA, have all adopted ambitious sustainability programmes which are prominently featured in their consumer communication. Within the Swedish travel trade, the three main leisure operators Apollo (Kuoni), Fritidsresor (TUI) and Ving (Thomas Cook Northern Europe) have adopted sustainability policies on a more noticeable scale. According to the Swedish Chamber of Commerce many operators have started to implement sustainable measures in their operations and introduced sustainable travel programmes. When investigating the market however, the network Schyst Resande (Fair Travel), which works to raise awareness around sustainable tourism in Sweden, found that 14 of 17 bigger Swedish leisure tour operators are currently lacking a formal policy for their social and environmental responsibility (Schyst Resande, 2013). The report found that these 'non-formalised' activities by tour operators, were incoherent and presented too many differences, making it difficult to assess for the consumers.

Social responsibility is gaining momentum for consumers: Fairtrade and KRAV, who both include social dimensions in their respective certification schemes, have benefited from this trend. This trend is something that could be used as a selling point for Fair Tourism, and should be tapped into when marketing responsible or sustainable holidays to Swedish consumers.

5.4. Key factors for growth: Price - Quality - Availability

There is an undisputable gap between consumer behaviour and action. This disparity needs to be studied more closely in order to be successfully bridged. The growth in Fairtrade and ecological goods in recent years indicates that consumers will indeed purchase more sustainably in the future.

Price is shown by research as being one of the main reasons why consumers end up opting for a non-sustainable holiday over a sustainable one. Research has shown that sustainability is not a primary driver in the booking decision, but rather a secondary one, when it is ranked against for example price and value for money. 41% of Swedish holidaymakers say that sustainable holidays should cost more or less the same as conventional holidays, whereas one in four state that they would be prepared to pay more (TUI Travel Sustainability Survey 2010). On the other hand, there is some evidence to suggest that tourists may be less price-sensitive when a completely sustainable product is offered, as opposed to one that only featuring certain sustainable elements (Kuoni, 2011).

If the price is higher for a sustainable option, it is important for suppliers to be transparent about the reasons for the higher price and that they inform clients of the benefits of booking a sustainable package. This is especially important for the Sustainable Beginners segment. An alternative would be for tour operators to reduce their profit margin slightly and absorb some of the price difference. This can be used as a marketing tool to show clients that the company is taking active responsibility for the issue.

The second factor of importance is **quality**. It is important to clearly convey to the consumer that by choosing a sustainable tourism option, the level of quality will not be compromised. By offering a quality-assured sustainable package at a competitive price, consumers may be encouraged to choose the sustainable option over the conventional one. Furthermore, it is essential to demonstrate to consumers (especially the Sustainable Beginner and the Active Sustainable travellers) that sustainable tourism is just "a different way of doing business", and not a niche offering. This can be done, for example, by making the sustainable offering easily accessible in the main brochure and on the website. The offer should be clearly marked with a certification or rating and it should be integrated with the conventional offering, rather than listing the products separately.

Availability is another relevant factor and currently one of the biggest problems within sustainable tourism. Nowadays more and more sustainable tourism products are developed. The problem, however, is that they are often still perceived as niche products which are offered in the luxury segment. In order to have a greater impact, sustainable tourism products should be offered on a broader scale.

There are currently a range of certification schemes available on the market. This is something that tends to cause confusion amongst holidaymakers. In order to combat this, it is recommended that, where possible, tour operators focus on one label, bearing in mind that there may not only be one label that covers all the destinations featured by the operator. Being able to offer sustainable tourism products may provide a successful differentiation strategy among tour operators, and as indicated above, it is important to make the sustainable travel options mainstream and easily accessible.

The number of Fairtrade-certified products in Sweden increased by 22% in 2012, and sales are increasing rapidly as a result. It is clear that retailers have started making Fairtrade products easily available and displayed next to the regular options, rather than placing them on separate shelves.

5.5. Awareness and Trust

Sustainable tourism is in the early stages of the product life cycle and therefore there is still a relatively low level of awareness around the term. TUI Travel conducted a Sustainability Survey among holidaymakers in eight of their key source markets and found that only about one in five holidaymakers are familiar with the term "Sustainable Holidays". Sweden was found to be below average in this regard, with only 6% stating that they are familiar or very familiar with this travel segment. 28% of Swedish consumers indicate that they are vaguely familiar with the concept. Because of this lack of awareness of the sustainable tourism product, Sweden is also below average when it comes to travellers who have already booked a sustainable holiday package (TUI Travel, 2010).

Building on awareness and trust are critical ingredients to enable growth in the Swedish market. Lessons can be learned from the strategy used by the Fairtrade label since its start in the mid-1990s. This strategy clearly showed that dedicated information campaigns and endorsements by spokespersons and celebrities, amongst others, are a useful instrument to increase Fairtrade knowledge in a trustworthy way. Fairtrade is now considered the most widely recognised ethical label globally. In Sweden, the label is familiar to 67% of consumers (10% above global average) and 65% considers it trustworthy or very trustworthy (Fairtrade Sweden, 2013).

According to Fairtrade Sweden, 74% of Swedish consumers consider independent certifications to be the most reliable way to verify the social and environmental guarantees of a product. Choosing a certification rating for the product may thus be a powerful tool for assuring quality, provided that the system is perceived as reliable.

Relevant communication and the fine-tuning of the message to the consumer group is crucial to the process. Informing travellers about how they can make positive contributions also plays an essential role in helping to increase the demand for responsible tourism. In terms of the Sustainable Beginners as well as the Active Sustainable responsible travellers, communication activities may be focused around providing basic information accompanied by personal stories. Giving concrete examples of the way sustainable tourism has made a difference in people's lives makes it less abstract and more tangible for the consumer. It is important to reinforce a positive message rather than playing on guilt, which could have the opposite effect and push consumers away.

Booking a holiday should be a positive experience and it is imperative to inspire consumers. Humour can be a useful tool in the messaging, as can the use of celebrities or other ambassadors/ spokespersons. For the Sustainable Pioneer Traveller, who is already relatively experienced and knowledgeable about sustainability issues, it is important to focus on providing transparent and detailed information about what makes a certain product sustainable.

5.6. Willingness to Switch

Two out of three respondents in TUI's consumer survey indicate that they would be prepared to change their behaviour on holiday in order to help the environment (TUI Travel, 2010), and in the right circumstances there appears to be a willingness to change. We have seen from the experiences of the Fairtrade label that consumers are increasingly starting to choose a Fairtrade option over a non-labelled alternative when the one is available alongside the other.

This finding reinforces the importance of listing sustainable tourism products as main brochure offerings, where they are easily available and comparable to non-sustainable options. With regard to the barrier of price, travellers can be expected to switch to sustainable offers provided that these products are not substantially more expensive than the non-sustainable or less sustainable products of the competitors (Hochschule Luzern / Kuoni, 2011).

Swedish long-haul travellers are often interested in active holidays, authentic experiences and interacting with locals. All of these interests are key elements in the Fair Tourism offering.

This provides good prospect for responsible tourism products, provided that it can be shown that travellers can experience the product at good value, secure in the knowledge that the premium paid is going to the right people on the ground. The travel industry needs to improve communication around the benefits of the responsible tourism offering and provide practical tools to help consumers switch to sustainable options.

5.7 Lessons Learned

Booking a holiday is a positive process and by providing inspiring, emotional and tangible messages around the sustainable offering (for example by using personal stories from the people behind the product) – the benefits of the contribution will become real to the consumers.

Similarly, fair and sustainable holidays tend to bring the tourist closer to the “real” side of the destination, by offering interaction with the locals, thereby adding authenticity to the travel experience. Consumers are more likely to act if they can relate to an issue, and being educated on real life examples of ethical tourism will help to make sustainable behaviour the norm - something which is especially important for the Sustainable Beginners. Involving spokespersons or ambassadors in the way that Fairtrade has successfully done thus far, would go a long way towards making sustainable tourism more “fashionable”.

It is clear that responsible behaviour at home is not necessarily indicative of responsible holiday behaviour. Swedish consumers are generally well-travelled and sustainability ranks high in reports of future travel trends. Ethical consumption is increasing year-by-year, but in terms of sustainable holidays, the concept is still relatively unfamiliar. To bridge this gap the industry requires focused work to educate and make sustainable offerings easily available. It is important to build on awareness and trust in the process of educating the consumer.

Research has clearly shown that certification schemes may be an efficient and trustworthy way of assuring product quality, provided that the label is perceived as reliable. To avoid confusion, it is advisable not to have too many certification labels per destination and that focussing on selected labels will be more efficient. Tour operators are encouraged to incorporate the sustainable products into the conventional offering, making them readily available and signalling that sustainable tourism is part of the norm and no longer a niche product for the activist part of the population. It should be easy to book a sustainable holiday.

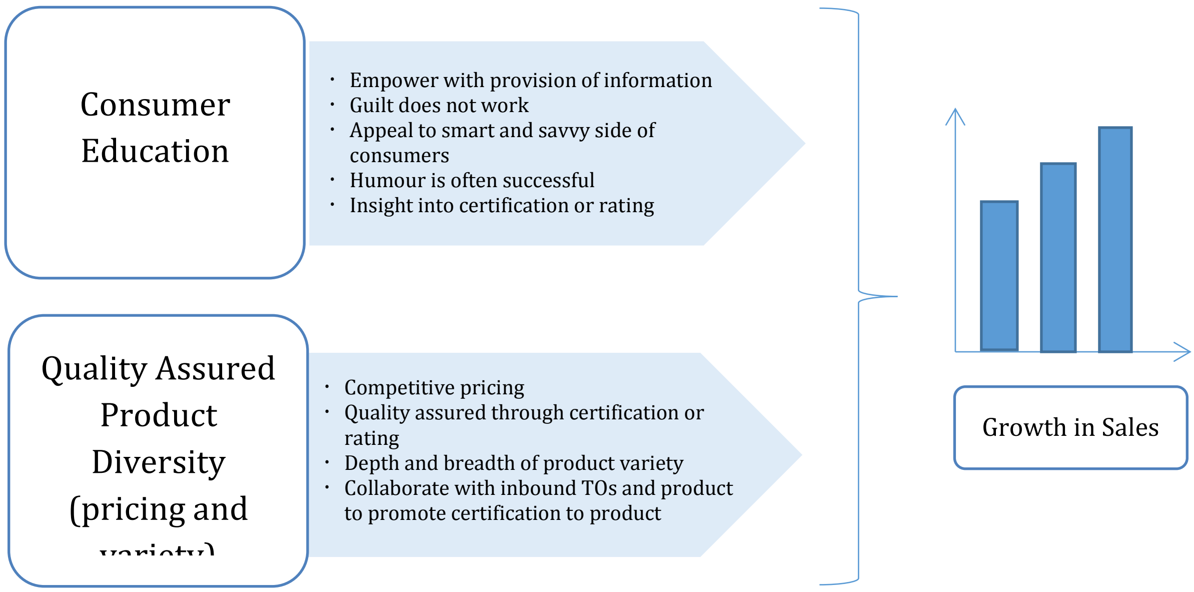
To further increase availability, both product and inbound operators should be engaged to incorporate sustainable guidelines into their offering. The adoption of a policy for the company’s corporate responsibility work is becoming expected by consumers. Introducing sustainable tourism product could therefore be a comparative advantage for tour operators, a way to differentiate themselves from competitors.

It is imperative to consider key factors such as price and quality in sustainable tourism product offerings. Consumers have shown interest in sustainable tourism but the majority of them are not prepared to change their behaviour if the price is higher.

It is thus critical to ensure competitive pricing and uncompromised quality in the offering. When offered two similar products, one of which has a sustainable certification, there is considerable evidence indicating that the responsible traveller would choose the sustainable option.

5.8. Model for Behaviour Change Process

Based on the above discussions and its conclusions, herewith a model for behaviour change based on 1. Education of the consumer, and 2. Ensuring a diverse offering of quality-assured product:



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