

The Hague University of Professional Education







## Executive Summary

This report was commissioned to examine the possible gap between the image and identity of TUI Nederland regarding sustainable tourism and to recommend on how to bring the image closer to the identity.

TUI Nederland is market leader in the Dutch travel industry and carries the brands Arke, Holland International, KRAS, ROBINSON, and lastminute.nl. The organisation is active in sustainable tourism.

The research draws attention to the fact that consumers do not exactly know what sustainable tourism is and that they are unaware of TUI Nederland's activities on the matter. However, other players in the travel industry praise the organisation's efforts on sustainable tourism. Further investigations reveal that new decision-making tools on the Internet weaken the position of the TUI Nederland's travel agencies. In addition, the travel agencies of TUI Nederland do not score high on knowledge, kindness, pro-activeness, and customer focus. Moreover, the analysis highlights the fact that there is low brand loyalty in the travel market and that TUI Nederland's brands do not differentiate enough from its competitors. Exploring consumer behaviour reveals that the Dutch are keen on travelling and are willing to make behavioural changes towards an environmental friendly lifestyle.

The fact that consumers are unaware of TUI Nederland's activities regarding sustainable tourism means that a gap exists between TUI Nederland's identity and image.

Communication can play an important role in differentiating TUI Nederland's brands and enhance brand image by positioning the organisation as sustainable travel organisation. The primary target group is consumers, and especially consumers with the age of 50 and higher. Secondary target groups are TUI Nederland's travel agents and suppliers. It is recommended:

- to create understanding about sustainable tourism amongst consumers;
- to create awareness of TUI Nederland as a sustainable travel organisation;
- to optimise knowledge and skills of the travel agents.

The key message that must be spread is that sustainable tourism means holidays with respect to humans, animals, and nature. An extended communication mix of instruments will transmit this message. The focus lies on creating a dialogue with the consumer in order to trigger them to think actively about sustainable tourism. This approach ensures bridging the current gap between image and identity.



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## Introduction

The continuous warnings of the risks of global warming have unleashed a trend: eco friendly. Consumers have become more aware of the consequences of their actions and therefore tend to choose the ecological version of products or services. The anticipation of this trend by businesses cannot be missed. This is also the case in tourism. Tourism is an industry that has great impact in the world. Preservation of cultural heritage and increasing employment and income for the inhabitants of the travel destinations are positive consequences of tourism. However, there is a downside: air pollution, water shortage, and exploitation of children are some of the many negative consequences of tourism. Sustainable tourism tackles these downsides of tourism, by focussing on respect for humans, animals, and nature. TUI Nederland, market leader, is an active player in sustainable tourism.

## TUI Nederland

TUI Nederland is market leader in the Dutch travel industry. It carries the brands Arke, Holland International, KRAS, ROBINSON, and lastminute.nl. Furthermore, TUI Nederland owns its own airline: ArkeFly. The travel agency group encloses 220 travel agencies by the names of Arke Reisbureau and Holland International Reisbureau. The organisation is a part of TUI Travel PLC, the largest European travel trading company that is active in more than 20 countries worldwide (TUI, n.d., “Welkom in de reiswereld van TUI Nederland!” section).

## Sustainable Tourism

Sustainable tourism is frequently confused with eco tourism. Eco tourism focuses for the greater part on nature. Sustainable tourism has a broader focus; it focuses on preservation of the holiday destination. It is not a niche market. The definition according to the World Tourism Organisation (as cited in Fairtourism, 2009, “Wat is Duurzaam toerisme”) is:

Development, which meets the needs of present tourists and hosts while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, and biological diversity and life support systems.

## Tour Operating in a Nutshell

“Tour operators are the organisers and providers of package holidays. They make contracts with hoteliers, airlines, and ground transport companies, then, print brochures advertising the holidays that they have assembled” (FTO, 2009, “Operators Factfile” section).

A package tour is composed of three components, that is: transport, accommodation, and entertainment. Traditionally, these package tours are sold by an intermediary: the travel agency. Nowadays, with the rise of the Internet, many tour operators offer their package tours directly to the consumers; these tour operators are called direct-sellers.

## Goal of the thesis

It is important to understand how consumers feel about the organisation and the products or services offered. This research is aimed to find out just that. How do consumers feel about sustainable tourism, what do they think it is? This is compared with the offer of TUI Nederland and how it is communicated. The intention of this research is to inform TUI Nederland about their image related to sustainable tourism amongst its consumers. Then, suggestions are given about how to close the possible gap between their image and identity.

## Central Question

What is the discrepancy between travellers' perception and TUI Nederland's offer regarding sustainable tourism?

## Sub Questions

1. Who is TUI Nederland?
2. How does TUI Nederland communicate?
3. What is TUI Nederland's target group? Who are its travellers?
4. What is TUI Nederland's offer of sustainable tourism?
5. What are the expectations of TUI Nederland's travellers of sustainable tourism?

## Key Words

Perception:	Image
TUI Nederland:	The largest tourism group in the Netherlands with activities in tour operating as well as travel distribution and air traffic.
Sustainable Tourism:	Development, which meets the needs of present tourists and hosts while protecting and enhancing opportunities for the future, according to the world tourism organisation (Fair tourism, 2009, "Wat is? Duurzaam Toerisme" section).

## Research Methods

The research consists of both desk and field research. The Internet, books, brochures, magazines, and newspapers are will be used for the secondary research. As for the primary

research, a survey amongst TUI Nederland's target group will be conducted. Besides, an interview with an expert on sustainable tourism will be held. In order to find out who TUI is, their website (tui.nl) will be researched, including their press releases, as well as the website of the holding TUI (tui-group.com and tuitravelplc.com). The website tourpressholland.nl will also be monitored for news. The websites fairtourism.nl, unwto.org, and eceat.nl will help to understand what sustainable tourism is. The survey will shed a light to people's perception of sustainable tourism. Data from statline.nl will inform about the Dutch behaviour concerning holidays. Newspapers will be monitored for news about sustainable tourism and TUI. TUI Nederland's brochures will be used to analyse their communication outings.

## Chapter Overview

The structure of this paper is based on the framework given by Vos, Otte and Linders (2008). Accordingly, the first chapter contains a situation analysis, with an emphasis on the corporate identity. This chapter will answer sub question one and three. The theory used, is the Corporate Identity Mix by Birgkit, Stadler and Funk as described in *Monitoring public perception of organisations* (Vos and Schoemaker, 2006, pp 57-58). One element, the communication activities, is described more thoroughly in the third chapter. This chapter elaborates not only on the communication activities, but also looks at the current trends in communication. This answer sub question two and four. Then, a closer look at TUI Nederland's environment is taken in the second chapter. In this section the current trends and developments and the stakeholders of the organisation are studied. The fourth chapter describes how consumers feel and think about sustainable tourism and TUI. The Corporate Image Measurement Model (Vos & Schoemaker, 2006, pp 84-86) is used for this research. Sub question five will be answered.

The fifth chapter brings all the information together in a final analysis, a SWOT-analysis. Finally, in the sixth chapter, recommendations in form of a communication strategy are given.



# 1 Internal Analysis

The internal analysis describes the identity and image of TUI Nederland. When dealing with concern communication, it is necessary to be aware of the image of the organisation (Vos et al, 2008, p27). According to Vos and Schoemaker (2006) the identity consists of the characteristics of an organisation and the way it manifests itself. The identity an organisation wishes to have is called desired identity and is described by means of its mission statement, general objectives and core values. The actual identity is researched using the Corporate Identity Mix. The elements of this mix are the personality of the organisation, the behaviour of the organisation, the visual recognisability of the organisation, and the communication activities of the organisation. All these elements are discussed in this chapter, except for the communication activities that are described thoroughly in the third chapter. Finally, the Corporate Image (the way TUI Nederland's stakeholders perceive the organisation) of TUI Nederland will be discussed. The perception of the consumers, on the other hand, will be discussed in chapter four.

## 1.1 Desired Identity

TUI Nederland's mission is described as following *Let's make people smile*. A constant factor in all TUI brands is the service with a smile, by which they wish to give their customers the time of their lives. The organisation feels that they are jointly responsible for the future of holiday destinations. Therefore, to be and stay number one in sustainable tourism is an important goal of TUI Nederland. Besides, TUI wants to be regarded as being credible, trustworthy, and reliable (Frenzel, 2008, *Code of Conduct*, p2).

The three core values are *enjoying life*, *opening doors*, and *going beyond*. The organisation sees these values as a guideline with which they provide the customer expertise, security, and quality. According to TUI Nederland, their customers enjoy every step of their holidays: in the brochures, the website, while checking in, during the holiday, and after the holiday, in other words they enjoy life. TUI opens doors that so far have remained closed. Opening doors stands for openness, respect, and integrity. Whatever the holiday wishes of the customer are, TUI Nederland can provide it. TUI continues where others stop, they go beyond. The organisation wants to create an "especially for me" feeling (TUI Nederland, *A Global View*, p17) and strives for offering more than what the customer expects.

## 1.2 Actual Identity

As mentioned above, the elements of the CI Mix are the personality, behaviour, visual recognisability, and the communication activities of the organisation (see figure 1), this last element will be described in detail in the chapter three.

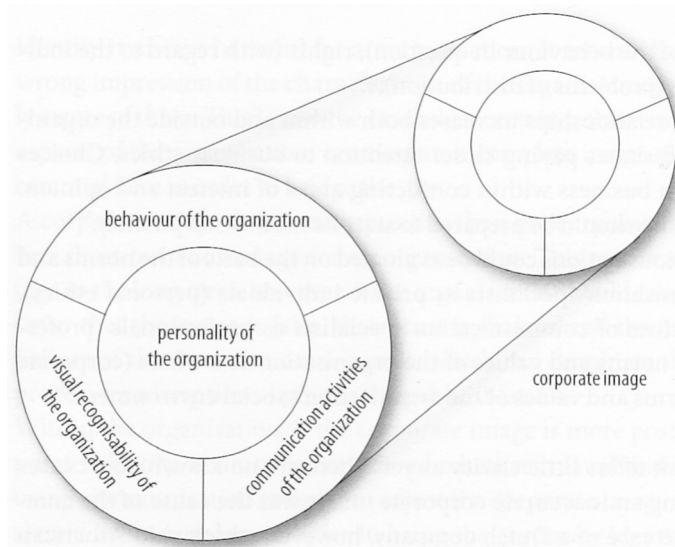


Figure 1: Corporate Identity Mix (Vos & Schoemaker, 2006, p58)

### Personality

The personality describes what the organisation stands for. As mentioned above the mission statement is *Let's make people smile*. A general objective is to be number one in sustainable tourism. The core values: *enjoying life, opening doors, and going beyond*.

### Behaviour

The behaviour is the way an organisation manifests itself. In other words: the products or services and customer service it offers, and the corporate social responsibility activities (Herlé & Rustema, 2005, pp 102). Through different tour operators and travel agencies TUI Nederland offers holidays all over the world. As can be assumed by the few complaints that can be found on review websites and consumer organisations, TUI Nederland is a reliable organisation.

TUI Nederland is active in sustainable tourism. The policy pillars are 'Duurzaam Toerisme Management', Buy green, Fly green, Sell green, Share green, Be green, and Be good.

- The organisation has a sustainable tourism department and manager structure where its activities are planned. The department has a full time equivalent of 1,4 and is supported by one or two interns (Duurzaam toerisme jaarverslag, 2009, p6). This is the pillar '*Duurzaam Toerisme Management*'.

- The pillar *buy green* reflects in the selection of suppliers of transport, accommodation, and entertainment. The greater part of the contracts with accommodations and agents include sustainability clauses. TUI Nederland has entered 730 of its best-selling accommodations in the Travelife Sustainability System<sup>1</sup>. The coaches that the TUI Nederland brands use all have the ‘Keurmerk Touringcarbedrijf’, a quality mark that focuses on safety, quality, and the environment. In the winter season of 2009/2010 the organisation has offered 53 destinations with a ‘sneeuwster’, which are destinations that are (partly) car free and offer free public transport or use green energy. Furthermore, the organisation has offered 47 destinations that are completely car free. TUI Nederland has selected hundred environmental friendly and sustainable accommodations for the winter season 2009/2010, which is 2% of the total offer. The summer season of 2010 includes over 200 green accommodations, which is over 3,5% of the total offer. These accommodation comply with the rules of the following quality marks such as Green Key, Green Globe. The Chocolate Tour in the Dominican Republic, which is developed in collaboration with Cordaid and PASEO, is an excursion that generates income for the local inhabitants. Dolphin and wale spotting excursions are selected under strict conditions. The working conditions of porters during trekkings follow the guidelines of the International Porters Protection Guidelines. (Duurzaam toerisme jaarverslag, 2009, pp 8-10)
- The pillar *fly green* focuses on the behaviour of the airline ArkeFly. This brand aims at lowering fuel consumption. This is done by selecting energy-saving airplanes that produce less noise and pollution. The airplanes and their motors are cleaned on a regular bases which improves aerodynamics and prolong the lifespan. ArkeFly reduces its weight by reducing excessive documentation and choosing lightweight products and materials. The purchase of catering and other in-flight products are sustainable, e.g. the blankets that are re-used and recycled instead of destroyed after every flight, in addition, coffee and tea are fair-trade. (Duurzaam toerisme jaarverslag, 2009, pp 12-13)
- The pillar *sell green* focuses on how the message of sustainable tourism can be transmitted and how the customer is directed in making the sustainable choice. This is described more thoroughly in the communication analysis in chapter 3.
- The pillar *share green* is reflected in the collaboration with several organisations that are active in animal welfare, protection of nature, and poverty combat such as ECPAT, Plan Nederland, Cordaid, and Stichting Aap. TUI Nederland sponsors Meninos Capoeiristas do Natal, Travel Foundation Nederland, and Stichting AAP. For several partners such as

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<sup>1</sup> “The Travelife Sustainability System is a (...) facility providing support, advice and tools to help (...) suppliers to improve their environmental and social performance and to save money”. (Travelife “My suppliers” section)

IFAW, Dierenbescherming, GreenSeat en HIVOS TUI Nederland spreads free advertisements and leaflets (Duurzaam toerisme jaarverslag, 2009, pp 19-20). Together with other organisations in the tourism industry (Baobab Reizen, Buro Scandinavia / Buro Britain, Europeesche Verzekeringen, GoodBookers Travel Group, Internoord Reizen, Oad Reizen, Sawadee Reizen, and Sundio Group) TUI Nederland forms the Dutch department of Travel Foundation. The goal of this foundation is to preserve holiday destinations by contributing to sustainable development and sustainable tourism (Travel Foundation, “Ons doel” section).

- The pillar *be green* is about the behaviour in the offices of TUI Nederland. Seventy-three percent of the office supplies are sustainable and the coffee is fair-trade. The caterer Albron uses biodegradable cleaning products and reduces packaging. Furthermore, the organisation focuses on healthy food with the ‘Ik kies bewust’ label. The energy that TUI Nederland uses is for 95% green. The organisation separates waste products, and collects mobile phones and cartridges for Stichting Aap. In order to save paper all printers automatically print double-sided and the paper is ‘FSC-papier’; besides, as many processes and documentations (such as pay slips) as possible are processed digitally. (Duurzaam toerisme jaarverslag, 2009, pp 22-24)

### Visual Recognisability

The visual recognisability of an organisation is expressed in the visuals that the organisation uses. The smile that TUI puts on people’s faces is symbolised in the logo. Interbrand Zintzmeyer & Lux designed the TUI logo in 2001 (“Catalogus”, 2008, “TUI”). As you can see in figure 2, the logo is red and based on the three letters of TUI. This smile is incorporated in the logos of Holland International and Arke. In addition, the TUI smile is seen on the faces of people in the commercials and pictures of these brands.

Even though Arke and Holland International carry the TUI logo, they do have their own style.

This means that they are endorsed brands. The other brands do not have a visible relationship with TUI Nederland. These brands are branded identities. KRAS, Goed Idee Reizen and Lastminute.nl, do not refer to TUI in any way. Robinson does refer to TUI, for example a



Figure 2: The TUI smile



small logo of TUI at the bottom of the website; but it is hardly visible. TUI uses its proprietary typeface *TUI Type*, designed by Dalton Maag.

### 1.3 Corporate Image

Annually the Reisrevue<sup>2</sup> has the ‘Verenverkiezing’, an election where players in the travel industry (tour operators, travel insurers, airlines etc) can win prizes. The winners are elected by the readers of the magazine, among which predominantly travel agents. In 2009, a total of forty prizes were given; TUI and its brands were nine times amongst prizes. The most interesting prizes for TUI were: Allround touroperator, Agent support (events, study tours, product presentation) and Green initiative (Tourpress Holland, “TUI overtuigend ‘beste allround touroperator’”, 2009).

The interview with Charlotte Louwman-Vogels, the managing director of Fair Tourism, reveals that the foundation applauds the actions taken by TUI Nederland on sustainable tourism. Especially the way the organisation tries to create awareness for sex tourism (C. Louwman-Vogels, personal interview, April 2, 2010).

The media do not write negatively about TUI Nederland, in fact it is hard to find any bad publicity on the organisation. The organisations that promote the consumers’ interests such as de Consumentenbond, Kassa and Radar do not publish negative articles about TUI or its brands.

The ‘Reisbureaumonitor’, an annual research on travel agencies performed by the Consumentenbond, gives the travel agency brand Arke the penultimate place (Consumentenbond, 2009, Einduitslag Reisbureaumonitor 2009). This research focuses amongst others on knowledge, kindness, pro-activeness and customer focus.

### 1.4 Conclusion

TUI Nederland is market leader in the Netherlands; besides, the organisation belongs to TUI Travel PCL, which is a large international organisation. Therefore, TUI is an important player in the market with a lot of power. TUI Nederland would like to be a credible, trustworthy and reliable organisation. The research for the corporate image shows that the travel industry as well as consumers’ interest organisations perceive the TUI brands as trustworthy. However, the travel agencies of Arke do not score high in knowledge, kindness, pro-activeness and customer focus. The travel industry is well aware of and even praise the organisation’s actions regarding sustainable tourism. The sustainable tourism department of

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<sup>2</sup> Reisrevue: a specialist journal in the travel industry that focuses on the travel agent; the magazine is seen as an authority (Frankwatching, 2009, “Site gespot: Reismanagers.nl” ¶3)

the organisation is a small one; this indicates that there is little in-house experience. Though here is still a long way to go before being completely sustainable, TUI Nederland has taken important steps towards becoming a sustainable travel organisation, in selecting suppliers, within the brand ArkeFly, by the collaboration with other organisations and the behaviour in its own buildings. The organisation attaches great value to sustainability.

## 2 External Analysis

It is important to understand in what conditions TUI operates. Only by monitoring the environment, an organisation can anticipate on movements and changes. This anticipation is needed if TUI wants to reach its goals on sustainable tourism. Monitoring explores the business opportunities for TUI Nederland. In the previous chapter the micro environment of TUI is researched. This chapter contains the analysis of the macro and meso environment. The section macro environment explains the trends and developments in society that can influence TUI Nederland. The meso environment includes a description of the travel market and the various publics or stakeholders that may influence the organisation and influence the perception of the organisation.

### 2.1 Macro Environment

This analysis of the macro environment includes a description of developments in the demography and economy and describes important trends and developments as globalisation, information technology, power of the consumer and social concern.

#### Globalisation

Globalisation can be described as a worldwide interaction between people, businesses, governments and cultures (Vormen, n.d., “Globalisering” section). Globalisation has increased the mobility of consumers. It is possible and even easy to book a ticket to the other side of the world.

#### Demography

Due to the baby boom after the Second World War, the drop in birth rate in the sixties and seventies and the rise in life expectancy, the share of elderly in the population rises (“Vergrijzing,” n.d., “Oorzaak” section).

#### Economy

The Dutch economy was growing until 2008, when the world wide financial crisis also hit the Netherlands. One of the most important consequences is a loss of faith in the economy; consumers spend less money, so the economy shrinks. When the economy shrinks, people have less money to spend. Holidays are one of the expenses on which people economise in case of fewer resources (Molenaar, 2007).

## Information Technology

In the nineties, Internet became a popular medium for the mass. According to Eurostat in 2009 ninety percent of the Dutch households had access to the Internet (Eurostat, 2009, “Internet access and use in 2009” section, ¶3). In 2009 two third of the elderly were active on the Internet (Medianet, 2009, Internetgebruik stijgt, vooral bij 50-plussers).

Internet has become an important tool for gaining and spreading information, and purchasing goods and services. Internet has made information much more accessible. This means that people are well informed, which makes them curious and less scared to travel.

Technological developments influence the working method within the travel industry. Internet facilitates and cheapens getting into contact with stakeholders. The booking systems of the travel agents are faster and up to date. The suppliers, who are located abroad, are easier to reach. Tour operators have become online direct sellers, communicating directly to the consumer, instead of through an intermediary.

## Social Concern

The consumer has become more aware of the effects of pollution. A large number of consumers are concerned about the environment and are willing to change their behaviour into a more environmental friendly lifestyle. This leads to changes in consumer behaviour in the choice of clothing, food and travelling.

Businesses include sustainability in their corporate social responsibility activities and communicate their environmental friendly behaviour. However the overflow of this environmental friendly behaviour could make the consumer less interested, which is called green-fatigue.

## Power of the consumer

The accessibility to information through Internet has empowered the consumer. The Internet facilitates the consumer to compare one product to another and to find the product that matches their personal wish list. Moreover, consumers share their experiences with potential buyers. Websites that are specialised in comparing goods and websites that encourage the consumer to review a product have emerged, anticipating on this development. With this information consumers are more independent in making their choices, the expertise of a salesperson is less needed. In other words the access to Internet has offered the consumer new decision-making tools to compare and book their own flights and accommodation, making them less dependent on tour operators and travel agents.

## 2.2 Meso Environment

The analysis of TUI's meso environment contains the following publics: the suppliers, the neighbours, the competitors, the consumers, the government, the media and the unions and pressure groups. The analysis starts with a description of the travel market.

### The Travel Market

Large (international) tour operators like TUI, Kuoni and Thomas Cook dominate the market. They have bundled the purchases of their several (international) brands. The volume of their purchases is enormous subsequently their prices are lower. Consumers switch often from tour operators, there is a very low brand loyalty. The average holidaymaker does not see a difference in the offer of the all round tour operators. Specialist tour operators are more capable to distinguish themselves from the other tour operators.

The rivalry amongst existing firms in the travel industry is significant. Tour operators operate in a matured and stabilised market; there is no significant growth. This leads to fierce price based competition on the mass markets. (Molenaar, 2007, pp 60-63)

### Suppliers

TUI Nederland's suppliers are transport organisations such as airlines and coach and ferry companies. The accommodation suppliers are hotels, campsites, bungalow parks, etcetera. The organisation has contact with local tour operators and agents who organise the excursions and tour guides. Finally, tourist boards, which are located in the Netherlands, are a great source for information and contacts.

### Neighbours

The inhabitants of the destinations of the holidays that TUI Nederland offers, see the (positive as well as negative) influence that tourism has brought. The positive development is usually seen in the beginning stage of tourism. In this stage the economy of the spot flourishes of the tourists. In a later stage the local population sees that tourism has its negative sides as well. The money that is being made usually no longer goes to the local population. Abuse of the local population arises in the form of bad working conditions (for example for tour guides) and sex tourism. The overflow of tourists, usually in summer, chases the local inhabitants away. This phenomenon can be seen in Venice, Italy, where the population has halved in the last 50 years. The hotels and apartments for tourists are usually build close to each other with the consequence of visual pollution of the area. Furthermore the tourists leave a lot of waste that needs to be processed, but is often being dumped in nature instead. Many tourists enjoy consuming or taking home souvenirs of wild species, which (amongst others)

has lead to the danger of extinction of species. Inhabitants of ski areas, see that once the snow has melted in summer, the mountains are being eroded by lack of trees.

## Competitors

TUI Nederland's key competitors in the Netherlands are: Thomas Cook, Sundio Group and Oad Groep. Thomas Cook Nederland is part of the Thomas Cook Group PLC and carries the brands Neckermann, Vrij Uit and Thomas Cook. Sundio Group is created in 2007 and coordinates the following brands: Sunweb Vakanties, Sudtours Vliegvakanties, Jiba, Vaya.nl, Evenements Reizen, SnowTREX, deREISGIGANT, GOGO, Husk Studentenreizen, X-travel, TraXs, Eliza was here, Bella Vakanza and the Belgian Skikot and Odyssée. It is the largest direct-seller in the Netherlands (SundioGroup, n.d., "De Organisatie" section). The Oad Groep consists of the following brands Oad Reizen, Globe Reisbureau, Hotelplan, Bex.nl, SRC-Cultuurvakanties. Looking at the corporate websites of Thomas Cook, Sundio Group and Oad Groep, it can be concluded that all three organisations act on sustainable tourism.

Smaller and specialised tour operators such as Sawadee Reizen, Shoestring, Djoser, Koningaap, SNP, Summum, Baobab, Kuoni are great competitors regarding sustainable tourism. Recently Sawadee (an direct seller of active and sustainable travels) has decided to sell its travels of via the travel agencies of Arke and Holland International. (TUI Nederland, 2010, "Sawadee gaat haar reizen verkopen via de winkels van arke en holland international reisbureaus" section)

## Consumers

The Dutch population is fond of travelling, it is not a question of if one goes on holiday, but where one is going. Eighty percent of the Dutch population (12.7 million people) goes on holiday at least once a year. More than half of them went abroad. The most popular holiday destinations are Germany, France and Belgium. The mean of transport for a holiday abroad is mainly the car; the airplane takes the second place, followed by the coach. (NBTC NIPO Research, 2008, "Kerncijfers over vakanties van Nederlanders") Due to the aforementioned decision-making tools less consumers book their holidays at a travel agency and Internet bookings rise. The interview with the general manager of Fairtourism reveals that when consumers are already interested in sustainability and include it in their daily life (for example by choosing green energy or a water-saving toilet), they are more likely to be interested in sustainable tourism. (C. Louwman-Vogels, personal interview, April 2, 2010)

## Government

The Dutch government has not set up guidelines with regards to sustainable tourism so far. The Dutch government can however show its support to initiatives; for instance, the State

Secretary Heemskerk has given his support to creating a label for sustainable tourism (Tourpress Holland, Eén label voor al het duurzaam toerisme, 2009).

Unfortunately, the Netherlands does not have a ministry of tourism, which means that the stimulation of sustainable tourism is fragmented. The ministry of Economic Affairs, the ministry of Education, Culture and Science and the ministry of Agriculture, Nature and Food Quality are the ministries that give support to sustainable tourism. (C. Louwman-Vogels, personal interview, April 2, 2010)

## Media

Consumers make decisions based on what they know. Since they are the largest providers of information, news and facts, the media play a massive role in the decision making process. Moreover, the media instigate public opinion. The agenda setting theory argues that the more time or space the media dedicate to a certain issue, the more the reader perceives this issue as important. But, the media also transmit the public opinion; this is mainly done by the *new media* or *social media*. The new media, such as blogs, social network sites and twitter enable the consumer to spread their message. Numerous websites encourage people to review products and bloggers have become influential spreaders of information and opinions. Not just the traditional media can instigate peoples' opinion, now everyone can become an opinion leader. The trends in social media and are described in the next chapter. It is possible for TUI Nederland to influence the content of the messages the various media spread. TUI can inform the press by means of press conferences, press releases, interviews, and other media contacts. In this way TUI spreads the message it wants to spread. However, it is up to the journalist and editor to decide what information is published. Therefore TUI Nederland's influence is little, but not unimportant.

## Unions and Pressure Groups

TUI Nederland has not yet had, but can expect criticism from multiple unions and pressure groups active in various areas. There is a lot of pressure from outside and the number of pressure groups increases. The ANVR has made guidelines for its members that stimulate sustainable tourism. The World Tourism Organisation has created a code of conduct in which sustainable tourism is encouraged. Various pressure groups focus on animals. The focus of the WWF and Greenpeace lies on the effect of climate change (due to the emission of carbon dioxide during transport) on animals, whereas the focus of the WSPA lies on animal cruelties on destination. All three organisations warn for souvenirs and consuming endangered species.

Smaller organisations as 'allesduzaam.nl', 'onze wereld' and 'de kleine aarde' favour sustainability in general and pay attention to sustainable tourism. De Kleine Aarde and the

NHTV<sup>3</sup> have developed the ‘Vakantie Voetafdruk’, a way of calculating the impact of a holiday on the environment. The foundation fair tourism devotes itself to informing the consumer about fair tourism. The ECAT (End Child Prostitution, child pornography And the Trafficking of children for sexual purposes) holds the travel industry partly responsible for sex tourism.

## 2.3 Conclusion

The travel market is a mature one so there is fierce competition. There is not much brand loyalty in the travel industry; this means that the consumer easily switches between tour operators and it is difficult to attach consumers to a brand. Due to globalisation it is easier to travel and therefore consumers travel more. The share of the elderly in the population rises; they form an interesting target group since they have relatively more free time and money. The Dutch go on holiday on a yearly bases however, in times of economic crises, consumers are likely to cut on holiday expenses. This means that consumers will probably travel close to home, that is to say in Europe. Online booking has become more popular; which means that fewer people book their holiday at a travel agency. However, the former direct selling tour operator Sawadee sees the importance of personal contact with its customers and has recently decided to sell its travels at the TUI travel agencies. Consumers have become aware of the consequences of pollution and are willing to change their behaviour into a more environmental friendly lifestyle. Once consumers have made changes in their lifestyle, there is a good chance that they will continue incorporating sustainability in their life.

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<sup>3</sup> NHTV, Internationale Hogeschool Breda is a Dutch University of applied science that focuses on digital entertainment, hospitality, leisure, mobility and tourism.



### 3 Communication Analysis

For this research, which focuses on TUI Nederland's identity and image, it is important to understand what message an organisation would like to spread and how this is done. To do that, an evaluation of the communication is needed. This chapter starts with a short analysis of TUI Nederland's target group, then the message, objectives and are described. Finally, trends in communication are illustrated. As aforementioned, TUI Nederland's goal is to be and stay number one in sustainable tourism. This analysis looks at the role that communication takes in order to achieve this goal.

#### 3.1 Target Group

According to the sustainable tourism manager of TUI Nederland, the organisation targets "everyone in The Netherlands" (E. Allart, telephone conversation, December 1, 2009). Yet, a close look at TUI's brands reveals a different image. Holland International and Arke both aim at families with children, where Holland International puts its focus on quality, Arke puts its focus on price. KRAS started out as a coach company and this still is an important product. This tour operator has a focus on elderly (over 55) and culture-interested consumers. Robinson focuses on the upper class that is interested in exclusivity, luxury and relaxation. Goed Idee Reizen targets Christians who are over the age of 50 and Jong Idee Reizen targets Christians from 17 to 25 year. The brand Lastminute.nl aims at bargain hunters on the Internet. Finally, the brand Extravacanza targets people soon to be newlyweds. A detailed description of each brand can be found in Appendix 1.

#### 3.2 Message

The organisation wants to characterise itself as a responsible organisation. According to the *Duurzaam Toerisme jaarverslag* (TUI Nederland, 2009), TUI Nederland wants to make the consumer aware of the importance of sustainable tourism and guide the consumer to a responsible choice.

#### 3.3 Objectives

- The organisation wants to make the sustainable holiday products clearly visible in the brochure.
- The websites need to reflect the green offer clearly to the consumers.
- The travel agents need to be well informed about the green offer and to actively inform the customers about sustainable tourism.

- TUI Nederland wants to know if the sustainable guidelines are being followed at the holiday destinations.
- The organisation wants their customers to respect the local rules of conduct during their holidays.

### 3.4 Communication Instruments

- TUI Nederland has developed a label for accommodations that follow the sustainable guidelines.
- Several brochures of Arke and Holland International contain pages that inform the potential traveller about sustainable tourism.
- The winter sport brochures contain the label 'groene sneeuwster' that indicates sustainable villages and transport means.
- The flyers and website 'Wijs op wintersport' give tips and advices on how to choose a sustainable destination, mean of transport and how to behave during the holiday.
- The websites of Holland International, Arke and KRAS have a section called 'verantwoord reizen' that informs about sustainability.
- The travel agents are informed about sustainable tourism during courses and trainings.
- A customer that has booked a holiday receives a folder with their travel documents that informs, amongst others, about sex tourism and souvenirs.
- During their holidays the traveller receives information from the tour guide about sustainable tourism.
- The travellers are stimulated to inform TUI Nederland about abuses of sustainable tourism that they have noticed during their holidays.
- The assessment form that the traveller receives after the holiday contains questions about sustainability.

### 3.5 Trends in Communication

As mentioned in the external analysis, Internet plays an important role in people's lives. Given the fact that Internet is a communication tool, the trends in communication are often related to the Internet. Seventy percent of the Dutch population is active on Social Network Sites (SNS) (Ruigrok Netpanel, 2009 "Hyves het populairste sociale netwerk" section). The website *Hyves* is the most popular SNS in The Netherlands. The international counterparts of Hyves: Facebook and MySpace are gaining popularity. The fourth SNS, called LinkedIn, is business oriented.

Network sites have the reputation of being predominantly used by young people. However, this is not the case, the largest group (25%) of SNS users are aged between 35 and

44. The average age of Facebook users is 38; the average age of Twitter users is 39 and the average age of LinkedIn users is even higher: 44. More than 60% of Facebook and Twitter users are 35 or older. The MySpace audience is a younger one, with more than 40% being under 25 years old (Royal Pingdom, 2010, “Study: Age of Social Network users” section).

Members of SNS create a profile usually giving information about their gender, age, residence, education and sometimes more. Therefore, it is possible to post social ads, i.e. banners based on these data.

It is also possible to focus on communities. Communities are networks built around a common interest, such as a hobby or even a brand. TUI Nederland has not created such a network on hyves nor on facebook. Members of these communities have interesting characteristics, namely: a high level of involvement and knowledge and a large network. Besides, it is relatively easy to get into contact with them and start a dialogue. These members function as opinion leaders or ambassadors of the brand. Widgets or applications are developed for them to spread amongst their network, letting the word-of-mouth or tell-a-friend principle playing an active role.

Twitter is a different kind of social network site, it is also seen as micro blogging. Users can post messages of maximum 140 characters, usually describing what they are doing (a status). Users can ‘follow’ other users. However, it is also used as a fast tool for spreading news.

It is important to be cautious with social networking marketing. Banner blindness, de-friending (deleting friends from their networks) and cautiousness with publishing personal information are the latest developments.

Blogs, as mentioned before, offer a platform for consumers to spread their ideas, opinions and other information. Businesses have blogs as well; there are different kinds of blogs as well, like: corporate blogs, CEO blogs, product blogs and blogs meant for internal communication (on intranets).

### 3.6 Conclusion

TUI Nederland’s target group consist of middle and upper class Dutchmen. The demographic and psychological segmentation is as follows: families with children, consumers over 50 years old, the culture interested, Christians and online bargain hunters. The organisation says that they focus on everyone in Holland, though, several important segments such as youngsters and singles are left out. The organisation uses various tools to achieve its goal that is make the consumer aware of the importance of sustainable tourism and guide the consumer to a responsible choice. These tools are put into action before, during and after the booking process and during and after the holiday. The Internet site of the brands includes

some information about sustainable tourism, however it is concise. The corporate website gives extended information about the subject, however, the layout and style are in a business-like approach. Besides, the website does not always function. SNS form an important trend in communication, TUI Nederland is not active on SNS.

## 4 Perception of Sustainable Tourism

This chapter reveals what the perception of sustainable tourism is amongst the respondents of the survey. First is explained how the questionnaire is set up and then the results are presented.

### 4.1 The Survey Method

In order to gain insight in the knowledge, perception and feelings of TUI Nederland's target group on sustainable tourism and TUI, a survey is held. The questionnaire, which can be found in appendix 2, consists of 18 questions. Questions one to four reveal the profile of the respondents by asking their gender, date of birth, postal code and hobbies. The other questions were based on the measurement model of Vos, 2006: the Corporate Image Measurement Model (CIMM). This model is chosen because it includes all the elements that could play a role in measuring image formation. These elements are primary impression, familiarity, perception, preference and position. Someone's primary impression gives a good indication of the most important image aspects one has of a certain company.

The primary impression of sustainable tourism was researched by free association, the question being: *What are the first 5 words that come to mind by sustainable tourism?* (question 5). Familiarity is the second element that has been researched (in question 6, 8, 9, 10, 11, 14, 16, 17 and 18). Familiarity has to do with the knowledge of sustainable tourism and TUI. Has the respondent travelled sustainable before? Does the target group have an (direct or indirect) experience with sustainable tourism? Does the respondent know any of the TUI brands and how?

Halfway the question sheet (question 13) *Which word now comes to mind with the term sustainable tourism?* is asked. The answers given by the respondents help to understand the third element of the model, namely the perception of TUI's target group on sustainable tourism. These answers are more reasoned, since the respondents have been thinking about the topic while filling in the previous questions. Later on, it is researched if the respondent links sustainable tourism with the TUI brands (question 17). The fourth element, preference, is measured by asking if the respondent would consider a sustainable holiday in the future (question 12), the importance of sustainable tourism (question 7). The last element, the position that the TUI brands take amongst other tour operators, is measured by asking the respondents their top 5 of favourite travelling organisations (question 15).

## 4.2 Analysis of Data

The most striking and interesting data are described thoroughly below. For an overview of data, see appendix 3.

### Profile of the Respondents

The survey is held amongst 107 Dutch respondents. A large majority, 64% is female. Which is more than the male/female ratio of the Dutch population. The year of birth of the respondents varies between 1934 and 1983. The average age is fifty. Fifty percent of the respondents are over 55 years old. A large minority (44%) of the respondents live in one of the 10 larger cities in the Netherlands, being Amsterdam, Rotterdam, 's-Gravenhage, Utrecht, Eindhoven, Almere, Tilburg, Groningen, Nijmegen and Haarlem.

### Primary Impression

The primary impression is measured by means of free association. The respondents have given 4 to 5 entries that come to mind with the term *sustainable tourism*. This has resulted in 404 entries counting 589 words. These entries have been analysed in three manners: a word cloud, a top five and in conceptual categories.

Not every respondent who started the questionnaire completed it. The most respondents (twelve) decided to quit the questionnaire when they arrived at the question what comes to mind with the term sustainable tourism. Three people skipped the question. This along with answers such as question marks, *I've looked it up now*, *no idea* could indicate that these respondents do not know what it is or do not wish to think about sustainable tourism.

The word cloud in figure 3 visualises the entries of the respondents, the size of the word represents number of times the word is filled in. As you can see the words nature, cycling, walking, green, and environment are most mentioned, they seem to be the key terms the respondents think about.



Figure 3: Word cloud of primary impression

The table 1 below shows the top five most mentioned words. The results differ from the ones of the word cloud because of the division of the entries that count more than one word. For the word cloud an answer as ‘fietsen in de natuur’ (cycling in nature) is counted as two entries: ‘fietsen’ (cycling) and ‘natuur’ (nature). For the top five ‘fietsen in de natuur’ is counted as one single entry. It is clear that the respondents relate nature the most to sustainable tourism since it is mentioned 29 times. Interesting entries that appear in the top 5 are ‘fietsen’, ‘openbaar vervoer’ (public transport) and ‘rust’ (rest or quiet). The top ten of the words can be found in the appendix 4.

Ranking		Number of times mentioned
1	Nature	29
2	Cycling, green	15
3	Environment	13
4	Ecological, honest, public transport, quiet	7
5	Environment-friendly	6

Table 1: Primary Impression

Finally, the words have been categorised by the researcher into the following nine categories:

- Respect & Honesty
- Environment-friendly
- Activity
- Location
- Ideology

- Transport
- Attitude
- Money
- Continuance

The two largest categories are Respect & Honesty (45 entries) and Environment-friendly (45 entries). In the category Respect & Honesty one can find terms such as *fair-trade*, *population friendly*, *honest price* (see Appendix 5 for a the words per category). The respondents also appear to think of expressing respect to the rules of conduct on the spot according to the words *litter*, *share*, *keeping culture intact*, *no animal sufferance*. A lot of the words are related to benefit of the local population, for example *investing*, *good for economy* and *good for population*. Secondly, the respondents have given ecological terms, such as *sustainable accommodation*, *recycling*, *no harm to nature*, and *co2*. One could say that the first category expresses a focus on how a tourist should behave on holiday and this category considers how an organisation (a tour operator, but also a (local) government) should behave. The terms referring to how an organisation should behave are clustered in the category Environment-friendly. The third category Activities (26 entries) contains activities that can be undertaken during a holiday. The most mentioned terms are *cycling*, *walking* and *camping*. In the next category Ideology (21 entries) one can find words as *vision*, *yoga*, *pure* and *Al Gore*. These words have to do with a philosophy or an outlook on life that is broader than sustainable tourism. The category Location contains 23 words such as *far away*, *China* and *in own country*. It is interesting that some of the words refer to a place close to home and other far away from home. Sixteen entries can easily be classed in the category Transport, such as *airplane*, *flying*, *busses* and *public transport*. Some people have expressed their opinion on sustainable tourism. Words as *quality*, *nonsense*, *hype*, and *enjoying* have been categorised in the Attitude category. Even though the last two categories are small (6 entries), they are interesting to mention. The category Money includes words as *expensive*, but also *a holiday that gives value for your money* and *stick it out with little money for a very long time*. Words as *long-lasting*, *long term* and *no ephemeron* are joined in the category Continuance. Finally, a few entries were not possible to be classified in these nine categories. These are entries as ‘*pfff*’, *summer* and *wood*.

## Familiarity

The respondents were invited to express their feelings about the statements about elements related to sustainable tourism: biological products, nature, travelling by airplane, camping, local inhabitants, animals and pricing. These statements relate stereotypes of sustainable tourism. The data can be found in table 2, on the next page. By analysing the answers, the



attitude and knowledge of sustainable tourism of the respondents is measured. Regarding the high scores (an average of 23 percent) on *no opinion*, it seems that a large part of the public is rather undecided about sustainable tourism.

Please indicate whether you agree with the following:					
	Totally Disagree	Disagree	No Opinion	Agree	Totally Agree
Sustainable tourism is for people who buy biological products.	20%	48%	16%	16%	0%
Sustainable holidays should be in nature.	6%	36%	22%	34%	2%
A travel by airplane can be sustainable.	11%	22%	28%	38%	1%
During a sustainable holiday one must camp.	23%	58%	17%	0%	1%
Bribing the local inhabitants (for example a customs officer at the border) can occur during a sustainable holiday.	15%	26%	20%	34%	5%
An excursion to a snake charmer is possible during a sustainable travel.	7%	16%	27%	48%	2%
Sustainable holidays are more expensive.	3%	28%	26%	37%	6%

Table 2: Familiarity

With the statement *Sustainable tourism is for people who buy biological products* 68% disagrees or totally disagrees. So the respondents supposedly see no relation between buying biological products and sustainable tourism. The views vary on the matter if sustainable holidays should be in nature: 36% disagrees, 34% agrees, 22% has no opinion. This means that there is not one clear image of nature in sustainable tourism. For some, nature is intrinsic to sustainable tourism, where for others it is not. To the affirmation *A travel by airplane can be sustainable* almost 40% agrees, however, a large 10% says to totally disagree and 22% disagrees. More than 80% disagrees or totally disagrees to *During a sustainable holiday one must camp*, only one respondent said to totally agree, the rest has no opinion. In other words, according to the respondents, camping is not essential during a sustainable holiday. The percentages with the affirmation *Bribing the local inhabitants (for example a customs officer at the border) can occur during a sustainable holiday* indicate that the respondents do not have a view on what role the local population plays in sustainable tourism. *An excursion to a snake charmer is possible during a sustainable travel*. To this affirmation over 50% agrees or totally agrees, 27% has no opinion and 23% disagrees or totally disagrees. For a large majority an excursion where an animal does tricks does no harm to the sustainability of a holiday. The respondents are undecided if sustainable holidays are more expensive. The majority (43%) agrees or totally agrees, but 31% disagrees or totally disagrees, 26 % has no opinion.

## Familiarity of People with a Hobby related to Nature

The results of people who have indicated in question four to have a hobby that suggests a relation to nature have been analysed separately, see table 3. These hobbies are outdoor sports, drawing and painting, gardening, photography and travelling. The hypothesis was that since these respondents spend their free time in nature, they are more likely to strongly value nature than others. The affirmations in which the answers of this 'nature-group' clearly differ (a difference of 10% or more) from those of the whole population are

- *Sustainable holidays should be in nature*, more people agreed (48% against 34%);
- *Bribing of the local inhabitants can occur during a sustainable holiday*, more people agreed (46% against 34%);
- *An excursion to a snake charmer is possible during a sustainable travel*, more people agreed (69% against 48%);

Please indicate whether you agree with the following:					
	Totally Disagree	Disagree	No Opinion	Agree	Totally Agree
Sustainable tourism is for people who buy biological products.	19%	49%	14%	19%	0%
Sustainable holidays should be in nature.	0%	36%	16%	48%	0%
During a sustainable holiday one must camp.	26%	57%	14%	0%	2%
Bribing the local inhabitants (for example a customs officer at the border) can occur during a sustainable holiday.	15%	23%	8%	46%	8%
An excursion to a snake charmer is possible during a sustainable travel.	7%	7%	24%	69%	2%

Table 3: Familiarity of respondents that have a hobby related to nature

## Preference

Preference is measured by asking if the respondents feel that sustainable tourism is important and if they have booked a sustainable holiday. Sixty percent of the respondents think that sustainable tourism is somewhat important and almost 30% thinks that it is very important. More than two third of the respondents say never to have booked a sustainable holiday. On the question why these respondents never have booked a sustainable holiday 57% says to organise their travels themselves; 25% claims never to have thought about it. Only three percent says always to book a sustainable holiday and 30% has booked a sustainable holiday. On the question why they have booked a sustainable holiday 37% think it is important; 44% says that their holiday was coincidentally sustainable.

None of the respondents that have booked a sustainable holiday were informed about the sustainability by the travel agency or the tour guide. 42% Says that they have looked it up themselves and 23% has been informed through the website where they have booked the travel. Seventy percent of all the respondents would consider a sustainable holiday in the future.

### Preference of 55+

As concluded in the second chapter, the group of 55 and older can be an interesting target group for TUI Nederland. Figure 4 shows that 61% thinks that sustainable tourism is somewhat important and 30% thinks that is very important. Of all respondents with the age over 55 seventy percent considers a sustainable holiday in the future.

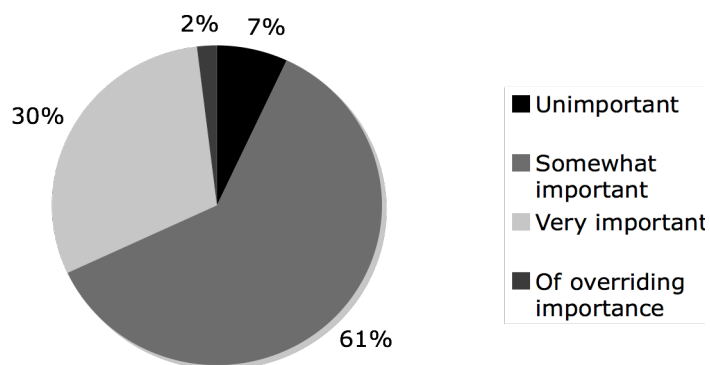


Figure 4: Importance of Sustainable tourism for 55+

### Secondary Impression

Now the respondents have been triggered to think about sustainable tourism, the question *What word now comes to mind with the term sustainable tourism?* is asked. This has resulted in 65 entries, counting 130 words, which are fewer words than for the primary impression, because only one word was asked. These data are analysed in a word cloud, a ranking and in the same categories as the words from the first impression. In the word cloud (figure 5), the words *nature*, *sound* (verantwoord), *honest*, *cycling*, *sustainable* (duurzaam) and *population* are mentioned the most.



Figure 5: Word cloud of secondary impression

Table 4 indicates the ranking of the most frequent words. Compared to the primary impression (table 1, above), there have been changes. The first place is still held by *nature*, but the other words concerning the environment have dropped places. *Cycling* has dropped one place, however, *honest* has climbed two places. New words in the ranking are *sustainable*, *buzzword*, *contradictio in terminis*, *expensive* and *respect*.

Ranking	Word	Nr of times mentioned
1	Nature	7
2	Honest	4
3	Cycling, Sustainable	3
4	buzzword, contradictio in terminis, expensive, environment, respect	2

Table 4: Secondary impression

Thereafter, the words have been placed in the same conceptual categories as the words from the primary impression. Some new words are *justice*, *bio fuel*, *use of sustainable products*, *being wise*, *important*, *PR*, *future*, and *exclusive*. A lot of new entries were not possible to class in the existing categories: *still the same*, *nothing*, *possibilities*, *pfff*, *unknown*, *not changed*. This explains the high percentage of 23 of this category. Figure 6 compares the size of the categories in percentages. Now, Attitude is the biggest category with the following words: *important*, *PR*, *try*, *enjoying*. Amongst the answers of this question, there were predominantly positive reactions, in contrary to the primary impression. This indicates, that when the respondents are triggered to think about sustainable tourism, their attitude towards the subject becomes more positive. The categories Respect & Honesty and Environment-friendly are still big categories; the words in those categories were more or less the same as before. The entries in Location differ from close to *far and exotic*, a new entry is *city*. As you can see the size of the categories Activities and Attitude have doubled; the size of Money and Continuance has stayed equal.

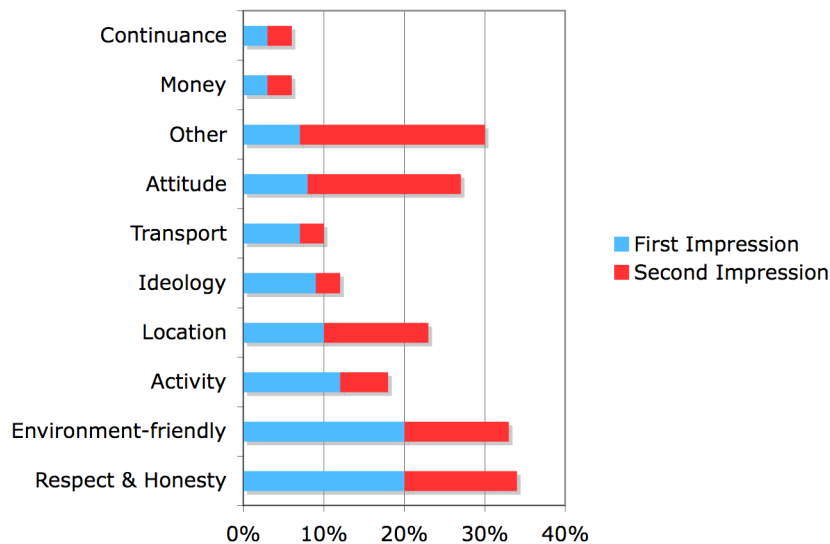


Figure 6: Size of Conceptual Categories

## Awareness

In order to research the awareness of the TUI brands, the respondents are asked which brands they are familiar with. Table 5, below, shows the five most well known tour operators, according to the respondents. Each tour operator in the first column has a score of 7 percent and as a result shares the first place. As you can see, the differences between them are not significant. The bold tour operators belong to TUI Nederland. Four out of the seven brands are in the top five. The whole ranking can be found in appendix 6.

Ranking	Tour operator	Percentage
1	<b>Arke</b> , Djoser, D-Reizen, <b>Holland International</b> , <b>KRAS</b> , OAD Reizen	7%
2	De Jong Intra Vakanties, Peter Langhout Reizen, Sunweb Vakanties, Vrij Uit	6%
3	Club Med, Jiba	5%
4	Hotelplan	4%
5	GOGO, <b>Lastminute.nl</b> , Sudtours	3%

Table 5: Awareness of tour operators

## Position of the TUI Brands

To the question *What are your favourite tour operators?* 23 respondents answered not to have a favourite tour operator, two have mentioned that they organise their own holidays and 28 people skipped the question. A minority has indicated to have a favourite tour operator. Table 6 (on the next page) shows the top five favourite travel brands. There is not much difference between the indicated brands. The brands in bold belong to TUI Nederland. Jiba takes the lead, KRAS takes the second place and OAD and D-Reizen the third.

Ranking	Brand	Nr of times mentioned
1	Jiba	11
2	<b>KRAS</b>	9
3	Oad, D-Reizen	8
4	Djoser	6
5	<b>Arke</b>	4

Table 6: Positioning

## Familiarity with the TUI brands

It is important to know if the respondents have had a direct or indirect experience with the TUI Nederland brands. As you can see below in table 7, the respondents know the TUI brands mostly from the media (television, radio, newspapers or Internet). Arke, Holland International and KRAS are tour operators that are known from the travel agencies as well, with respectively 18%, 26% and 9% (i.e. a direct experience). For KRAS and Lastminute.nl word of mouth communication is an important source. A lot of respondents have indicated not to know (Not applicable) the brands ROBINSON with 65% and Lastminute.nl with 43%.

How do you know the following brands?					
	Media (radio, television, newspapers, Internet)	From others (friends, family, acquaintances, colleagues)	From the travel agency	I work or I have worked there	Not applicable
Arke	76%	3%	18%	0%	4%
Holland International	64%	1%	26%	1%	8%
KRAS	68%	9%	9%	1%	8%
ROBINSON	13%	1%	0%	0%	65%
Lastminute.nl	49%	6%	1%	0%	43%
Average	54%	4%	11%	0%	26%

Table 7: Familiarity with the TUI brands

## Familiarity with TUI's Policy

To the question if TUI's tour operators offer sustainable tourism, a huge majority (an average of 68%) answered *I do not know*. The detailed results can be found in table 8 (below). If the respondent did not know the brand, they were asked to check the box *not applicable*. ROBINSON is the brand that scored the most (7%) positive answers and KRAS scored the most negative answers, 21% said no.

Do the following brands offer sustainable tourism?				
	Yes	No	Do not know	Not applicable
Arke	1%	15%	78%	6%
Holland International	4%	15%	73%	9%
KRAS	3%	21%	68%	9%
ROBINSON	7%	5%	42%	46%
Lastminute.nl	0%	15%	58%	27%

Table 8: Familiarity with TUI's policy

As much as 89% does not know other (not TUI) brands who offer sustainable tourism. The 11% that has indicated to know other tour operators that offer sustainable tourism mentioned Djoser (4 times), Fietsvakantiewinkel, Sawadee, Shoestring (twice), Koning Aap (twice), Pharos Reizen (twice), Wandelwaaier, SNP (twice) and 'kamperen bij de boer'.

## Remarks

At the end of the questionnaire a space for remarks was given. Six remarks reflected a doubt about what (exactly) sustainable tourism is. A few respondents said that they would like more information (from the media, for example). Some said not to believe that sustainable tourism is possible and other said that they welcome sustainable tourism.

## Conclusion

The hypothesis of the research to the perception of sustainable tourism and TUI Nederland was that the respondents would not exactly know what sustainable tourism is. A lot of reactions indicate just that. However looking at the words given in the free association questions, a lot of the words correspond to what sustainable tourism is. This means that the consumers do have an image of sustainable tourism, but it is still vague. It is interesting to see that when the respondents are triggered to think about sustainable tourism, their attitude towards the subject becomes more positive. Besides, a large majority of the respondents says that they would consider a sustainable holiday in the future. This is a great opportunity for TUI Nederland. Furthermore, the respondents do not link sustainable tourism with the TUI brands; this means that the TUI Nederland is not perceived as an organisation active on sustainable tourism. The travel agency is not the source where one searches information about sustainability. The results from this survey indicate that the brands Arke, Holland International and KRAS are strong; they have high brand awareness.





## 5 Final Analysis

The final analysis is aimed at bringing all information that has been gathered together. It identifies internal and external factors that can create or destroy value (“SWOT-analysis”, n.d., “Description” section). The internal factors of the organisation that create value are the Strengths; the internal factors that destroy value are the Weaknesses. Opportunities are factors in the environment that create value; Threats are external factors that destroy value. Together they form the SWOT-analysis. Once the values are identified, they are confronted in a confrontation matrix, from which the strategy follows.

### 5.1 SWOT Analysis

The most important strengths, weaknesses, opportunities and threats that have come out of the research are listed below.

#### Strengths

- S1 The TUI brands have high brand awareness and are seen as a trustworthy brand
- S2 Due to TUI Travel PLC TUI Nederland has good investment opportunities
- S3 The power of travel agency lies in personal contact

#### Weaknesses

- W1 The organisation does not focus enough on Internet
- W2 Little in-house experience with Sustainable Tourism
- W3 Consumers are not aware of Sustainable Tourism
- W4 TUI brands do not differentiate from other brands

#### Opportunities

- O1 Ageing of society
- O2 Consumers see Sustainability as important
- O3 The main competitors of TUI Nederland are not active in Sustainable Tourism
- O4 The average Dutchman goes on holiday on a yearly basis

#### Threats

- T1 The travel industry has low brand loyalty
- T2 Internet bookings increase
- T3 The travel industry is sensitive to economic crises
- T4 There is scepticism on Sustainable Tourism

## 5.2 Confrontation-Matrix

The strengths, weaknesses, opportunities and threats are displayed below in a confrontation-matrix, see figure 7. The abbreviation ST stands for sustainable tourism.

	O1 Ageing of society	O2 Consumers see ST as important	O3 Competitors are not ST	O4 Every year on holiday	T1 Low brand loyalty	T2 Internet bookings increase	T3 Sensitive to economic crises	T4 Scepticism on ST
S1 High brand wareness and trust in the TUI brands				X				X
S2 Good investment opportunities		X				X	X	
S3 Power of travel agency in personal contact	X							
W1 Not enough focus on Internet						X		
W2 Little in-house experience with ST		X						
W3 Consumers are not aware of ST					X			
W4 TUI brands do not differentiate			X					

Figure 7: Confrontation-Matrix

### Core Problem and Bottlenecks

To define the core problem, it is needed to reiterate the central question: Is there a discrepancy between travellers' perception and TUI Nederland's offer regarding sustainable tourism? There is a gap between identity and image. The research of TUIs image reveals that the travel industry is well aware of the organisations' efforts concerning sustainable tourism, however the consumer is not. Other bottlenecks that should be addressed are as following:

- The consumer has an image of sustainable tourism, but it is vague.
- The travel agencies experience fierce competition of the new decision-making tools of Internet, in addition, the travel agencies of TUI Nederland do not perform very well.
- TUI Nederland's brands do not stand out from the other brands and the travel industry suffers from low brand loyalty.

By combining the data from the confrontation matrix and the core problem and bottlenecks the following general objectives are proposed. (The codes mentioned between brackets refer

to the strengths, weaknesses, opportunities or threats, e.g. O1 stands for Opportunity 1: ageing of society and S2 for strength 2, being good investment opportunities.) The travel industry is sensitive for economic crises, however the average Dutchman goes on holiday on a yearly bases. This means that in case of crises the consumer will spend less on holidays and stay close to home. Therefore TUI Nederland should focus its sustainability on the European destinations (O4, T3). In addition it will differentiate the TUI Nederland brands from its competitors and increase brand loyalty (O3 & W4, T1 & W3). Bearing in mind that TUI Nederland is seen as a trustworthy organisation, the organisation has a great chance in persuading the sceptic consumer (S1 & T4). This means that, first; the TUI Nederland needs to differentiate itself from its competitors. Secondly, the brand image needs to be enhanced. The image of TUI Nederland should be positioned as a responsible travel organisation.



## 6 Communication Plan

As mentioned before, communication plays an important role in closing the gap between image and identity, and achieving the aforementioned general objectives. Therefore this plan starts with describing the role communication plays in solving the problem. Then, while taking in account TUI Nederland's current target groups, the target groups are defined. Furthermore, communication objectives that are derived from the general objectives; the strategy to achieve these objectives; and the instruments that support the strategy are mapped out. Finally, the evaluation of the plan is illustrated.

### 6.1 Role of Communication

The current goal of TUI Nederland is to be and stay number one in sustainable tourism. There is no need in changing this. However, the gap between image and identity must be bridged, in other words: the consumer needs be aware of TUI Nederland's activities regarding sustainable tourism. TUI Nederland has taken important steps towards becoming a sustainable travel organisation: in selecting suppliers, within the brand ArkeFly, by the collaboration with other organisations and the behaviour in its own buildings. This adds value to the holiday experience. The travellers feels that he has done good by choosing this trip and therefore feels good about himself. The awareness of sustainability needs to be created through enhancing the sustainable aspect of the brands. This must be done by promoting the product benefits to its potential traveller, the product benefits being related to the sustainability of the travel. For example the green accommodations that TUI Nederland offers or the fact that ArkeFly selects airplanes that are energy saving. First, TUI Nederland needs clarify the image that consumers have of sustainable tourism through enhancing its brands as sustainable. If consumers do not know what sustainable tourism is, they will not be able to attach the value of sustainability to the organisation. Then, consumers need to see TUI Nederland as the organisation for sustainable tourism. Not only will the image be closer to the (desired) identity, but also will it enhance differentiation of the TUI Nederland brands and therefore increase the possibilities for brand loyalty. The travel agents, who have personal contact with the customer, should know exactly what sustainable tourism is and be able to effectively inform the customer about the matter.

### 6.2 Target Groups

Based on the confrontation-matrix in the previous chapter, this communication plan will focus on following target groups: consumers, travel agents, and suppliers. The share of elderly in the Dutch population increases. Since they book their holidays at the travel agency,

TUI Nederland should invest in the knowledge and sales techniques of the travel agents on sustainable tourism (O1& S3). The power of the agents lies in the personal contact and their persuasiveness. This does not only apply for the elderly, but also for the 30+ who book their holidays at a travel agency. However, because of the rise of Internet bookings, TUI Nederland should keep on investing in their Internet sites (W1 & T2). This means that the primary target group are the consumers. An important segment of the consumers, are the elderly. The secondary target groups are the travel agents and suppliers. With travel agents, not only the travel agents from Arke Reisbureau and Holland International are meant, but also the agents who work at TUI's call centres. The suppliers include the transport organisations, the accommodation suppliers, the local tour operators and local agents, and tourist boards.

### 6.3 Communication Objectives

In order to determine the strategy and communication tools, these general communication objectives must be concrete, quantified, timed, and measurable. (Vos et al, 2008, p67) This results in the following communication objectives:

- to create understanding about sustainable tourism with 30% of the consumers within one year and a half;
- to create awareness of TUI Nederland as a sustainable travel organisation with 15% of consumers within one year and a half;
- to create awareness of TUI Nederland as a sustainable travel organisation of every supplier within one year and a half;
- to optimize the knowledge and skills of all TUI travel agents within one year and a half;

The table below (table 9) shows the communication objective per target group.

Target Groups	Communication objectives
Consumers	Within 18 months, 30% of the consumers understand that sustainable tourism is about respect for humans, animals, and nature.
Consumers	Within 18 months, 15% of the consumers perceive TUI Nederland as a sustainable travel organisation.
Suppliers	Within 18 months, every supplier knows about TUI Nederland's activities regarding sustainable tourism.
Travel Agents	Within 18 months, all travel agents are able to inform their customers about sustainable tourism.

Table 9: Overview of target groups and communication objectives

These communication objectives are each in an other area of communication, that is to say in concern communication, marketing communication, and internal communication. That is why an integrated communication strategy is set up. However, since this research is aimed at bringing the image closer to the identity, the focus lies on the first two communication objectives.

## 6.4 Communication Strategy

The communication strategy is divided into two sections, the key idea and the communication tools. The key idea describes in which way the target groups will be approached and the positioning of TUI Nederland. Furthermore, the central theme is determined, from which the messages per target group are derived. Then, the communication instruments with which the message will be promoted are described.

### The key idea

In order to create understanding about sustainable tourism, a two-way traffic, i.e. a dialogue, is the most effective. This way the consumer is triggered to think actively about sustainable tourism and it is possible to answer questions. To inform the more critical group, the elderly, a dialogue is more effective. Since it is a subject where people show little interest in, it is important to have an emotional approach (Vos et al, 2008, p67). The emotion should not be fear; a joyful and positive approach is desired. By focussing on sustainable tourism, TUI Nederland is a trendsetter instead of a trend follower, making its approach pro-active. The organisation needs to be open about the progress the organisation makes in sustainable tourism. If TUI Nederland portrays a better image of its actions in sustainability, the trustworthiness and credibility of the organisation are in danger. Therefore, a high level of transparency is needed. The style, or tone-of-voice, should be somewhat personal so that the consumer feels involved and addressed. The suppliers and travel agents, though, demand a business-like approach.

TUI Nederland needs to be positioned as responsible travel organisation that values conservation of the travel destination and respects humans, animals, and nature. This is called a transformational positioning. The image of the organisation needs to be labelled as responsible.

The central theme in the approach is sustainable tourism: respect for humans, animals, and nature. For each target group a specific message is set up. These messages are alike, since they are derived from the central theme. This is important because a target group can read messages intended for another target group. The messages per target group are listed on the next page, in table 10.

Target Group	Message
Consumers	Sustainable tourism means holidays with respect for humans, animals, and nature.
Consumers	TUI Nederland offers sustainable tourism.
Suppliers	Offer sustainable tourism with TUI Nederland.
Travel Agents	Increase your knowledge about sustainable tourism and put it pro-actively into action with a customer.

Table 10: Overview of target groups and messages

## Communication instruments

In order to promote the message to the target groups, a combination of instruments are used so that a communication mix occurs. (Vos et al, 2008, p83). The choice of instruments is inspired by the result from the survey in chapter four. Consumers appear to link sustainable tourism with cycling and walking. The instruments mentioned below should transmit the messages to the consumers. An overview of the instruments per message and target group can be found in table 11.

- TUI Nederland will be present at different fairs, namely: ‘de Vakantiebeurs’, ‘de Huishoudbeurs’, ‘de Fiets- en Wandelbeurs’, ‘de 50Plus Beurs’, ‘de Margriet WinterFair’, ‘de Kampeer- en Caravanbeurs’, and ‘de BeBetter Beurs’. These fairs have been selected based on the demographics of the target group and the associations that have come out of the survey. The personnel that are present in the stand need to be well informed about sustainable tourism and pro-actively approach the visitors. In order to trigger the visitor to actively think about sustainable tourism, a game needs to be invented. Finally, brochures about the subject need to be spread. The stand, the uniforms of the personnel and the brochure all include the TUI smile.
- The second tool for creating a dialogue is approaching people on the street, in community centres, and canteens of sporting clubs to start a conversation and hand out a brochure. Therefore, the personnel need to be well informed about sustainable tourism. Again, the TUI smile will appear on their uniforms and the brochure.
- As mentioned earlier a brochure needs to be compiled. The brochure will mostly include information about sustainable tourism, provide testimonials from those who have experienced sustainable travelling with TUI Nederland, and information about TUI Nederland’s activities regarding the subject. These brochures should be spread at the travel agency as well as at the fairs and during the personal contact.



- The dialogue will also be created on the Internet, using the Social Network Sites. For hyves and facebook a company profile needs to be created. With this profile TUI Nederland can participate in and start discussions. A page called ‘verantwoord reizen’ needs to be created and users who have indicated to have hobbies that are related to sustainable tourism (such as travelling, cycling, camping) should be invited. This page includes information about sustainable tourism and starts discussions and polls.
- Websites, blogs and social network sites related to sustainable tourism need to be monitored. TUI Nederland should react on blogs and discussions. The central message should be included in this reaction.
- TUI Nederland should spread the information about sustainable tourism in form of an image. As public transport was an important association with sustainable tourism, the posters will be spread in billboards in bus stops, train stations and throughout the country. The images will also be printed on the means of public transport themselves.
- TUI Nederland will collaborate with travel programmes on television, such as RTL Travel and CampingLife to inform the viewers about sustainable tourism. Sustainable tourism should be a weekly topic in these programmes and sponsored by TUI Nederland.
- Experts of TUI Nederland on sustainable tourism should appear on informative and entertaining television shows such as KRO Koffietijd, Tijd voor Max, Goedemorgen Nederland, and Life for you to talk about sustainable tourism.
- Consumers seem to appear to link cycling and walking to sustainable tourism, therefore the organisation should sponsor events such as ‘Meimaand Fietsmaand’ and ‘de Wandel Vierdaagse’.
- The websites of the brands will include a button ‘verantwoord reizen’ on their homepages which redirect the potential traveller to a page that contains information about sustainable tourism, testimonials of those who have experienced sustainable travelling with TUI Nederland and the activities regarding the subject. These testimonials should be included to the corporate website as well.
- Advertisements on the website google in form of google Adwords are desired.
- Collaboration with the supermarket Albert Heijn can be created. This supermarket has a label called ‘puur&eerlijk’ that indicates that the products that are produced with care for human, animal and nature. (Albert Heijn, “Assortiment” section)
- The customers who have already booked a holiday with a TUI Nederland brand will be informed about sustainable tourism and the organisation’s actions by means of a newsletter.

In order to transmit the message to the suppliers TUI Nederland needs to inform them about the policy regarding sustainable tourism through meetings. The suppliers will be kept up to date with the progress through newsletters.

The travel agents will receive extended information about sustainable tourism by means of trainings. Coaching will be offered to help them with introducing sustainable tourism during a conversation with the customer. The intranet needs to contain a helpdesk, where information can be found rapidly and questions can be asked. A fact sheet should be published to give a grip to the travel agents during the conversation with the customer. Eventually, frequently asked questions will be published on the intranet as well.

Target Group	Message	Instrument
Consumers	Sustainable tourism is holidays with respect for humans, animals, and nature.	<ul style="list-style-type: none"> <li>- Fairs</li> <li>- Personal contact on the street</li> <li>- Brochure</li> <li>- Television programmes</li> <li>- Documentaries</li> <li>- SNS</li> <li>- Billboards</li> </ul>
Consumers	TUI Nederland offers sustainable tourism.	<ul style="list-style-type: none"> <li>- Sponsorships</li> <li>- Billboards</li> <li>- Newsletters</li> <li>- Website</li> <li>- Fairs</li> <li>- Google Adwords</li> <li>- Collaboration with Albert Heijn</li> <li>- SNS</li> <li>- Advertisements</li> </ul>
Suppliers	Offer sustainable tourism with TUI Nederland.	<ul style="list-style-type: none"> <li>- Meetings</li> <li>- Newsletters</li> </ul>
Travel Agents	Increase your knowledge about sustainable tourism and put it pro-actively into action with a customer.	<ul style="list-style-type: none"> <li>- Training</li> <li>- Coaching</li> <li>- Intranet</li> </ul>

Table 11: Overview of target groups, messages, and instruments

## 6.5 Organisation

The section organisation is composed of planning in broad terms and research and evaluation.

## Planning in broad terms

The instruments brochure, SNS, website, google Adwords, newsletters, meetings, and intranet need to put into action and kept up-to-date permanently. The fairs take place, predominantly, in fall and winter, which is also when the consumers start planning their holidays. It is best to plan the presence on television between October and May. That is the period in which most people watch television and the presence at the fairs can be promoted, which will attract consumers to the stand. In spring and summer the two events, ‘Meimaand Fietsmaand’ and de ‘Wandel Vierdaagse’ take place. The posters in the billboards should be placed in November and December (when the consumers begins with the planning of their holidays) and in summer (when the consumers go on holiday). This way, the images connect with the thoughts of the consumers. The collaboration with Albert Heijn is planned in April and May; however, these dates should be set in consideration with the supermarket. Below the planning in broad terms can be found in table 12.

Time	Activity	Target Group
Continuous	Brochure	Consumers
	SNS	Consumers
	Website	Consumers
	Google Adwords	Consumers
	Newsletters	Consumers
		Suppliers
	Meetings	Suppliers
	Intranet	Travel agents
June	Training	Travel agents
July	Training	Travel agents
August	Training	Travel agents
September	Training	Travel agents
October	Training	Travel agents
	TV-programme	Consumers
November	Training	Travel agents
	Billboards	Consumers
December	Training	Travel agents
	TV programme	Consumers
	Billboards	Consumers
January	Training	Travel agents
	Fair (Vakantiebeurs)	Consumers
	TV programme	Consumers

Time	Activity	Target Group
February	Training	Travel agents
	Fair (Huishoudbeurs and Fiets- & Wandelbeurs)	Consumers
	TV programme	Consumers
March	Training	Travel agents
	Personal contact	Consumers
April	Training	Travel agents
	Personal contact	Consumers
	Collaboration with Albert Heijn	Consumers
May	Fair (BeBetter Beurs)	Consumers
	Meimaand Fietsmaand	Consumers
	Collaboration with Albert Heijn	Consumers
June	Training	Travel Agents
	Billboards	Consumers
	Personal contact	Consumers
July	Travel Agents	Travel Agents
	Billboards	Consumers
	Personal contact	Personal contact
August	Training	Travel Agents
	Billboards	Consumers
	Personal contact	Consumers
September	Fair (50Plus Beurs)	Consumers
October	Fair (Kampeers- & Caravanbeurs)	Consumers
November	Fair (Margriet Winterfair)	Consumers
	TV-programme	Consumers

Table 12: Overview of the sequential activities programme

## Research and evaluation

Before putting the communication plan into action, a zero rating is needed. A clear view of how much the consumer knows about sustainable tourism before the action is needed to be able to measure the effect. Before the communication instruments are put into action a pre-test is needed, especially for the brochures. The commercial with Albert Heijn requires a concept test.

During the campaign, it is advised to test if the communication efforts have effect. When needed, the use of instruments can be adjusted. It is important to regularly check with the personnel who have the personal contact on the streets, since they are the ones who receive a lot of information about the consumers' knowledge, attitude and behaviour.

It is advised that TUI Nederland tackles the attitude and behavioural challenges in a later stadium. The survey has proved that, once consumer has been triggered to think about sustainable, their attitude towards the subject is positive. This means that by informing the consumer about sustainable tourism, a great step is taken in changing their attitude. When the knowledge about sustainable tourism is increased, research in changing the attitude and behaviour of the consumers can be started i.e. consumers should become interested and understand the importance of sustainable tourism and therefore book a sustainable travel at one of the TUI Nederland brands.

The trainings of the travel agents need to be evaluated. Then, it needs to be researched if the travel agents are capable of using the new knowledge and techniques.

After the campaign, it is needed research the knowledge of the consumers about sustainable tourism. It is also important to evaluate the training and the effect of informing consumers about sustainable tourism at the travel agency. The communication objectives need to be reiterated in the evaluation progress and compared with the current situation. Then, it comes clear to what extend the objectives are achieved and to what extend the campaign has been effective.

Based on the confrontation-matrix in the previous chapter, a final recommendation for TUI Nederland is made. This recommendation is not communication-related, however it is considered as an opportunity for TUI Nederland that cannot be missed. Sawadee is a tour operator that offers sustainable tourism and is mostly focussed on destinations that lie outside Europe. Sawadee is an active player on the Internet. By buying this tour operator TUI Nederland will attach the people who already are interested in sustainable tourism (S2 & T2). As TUI Nederland has strong financial backings by TUI Travel Plc, TUI Nederland can invest in sustainability (S2 & O2). Besides TUI Nederland can learn a lot from its experience and make use of its knowledge of sustainable tourism, since TUI Nederland has little in-house knowledge on the matter (W2 & O2).



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## Appendix 1 Transcript of the Interview with Fairtourism

Interview by telephone April 2, 2010 with Charlotte Louwman-Vogels, General Manager of Fairtourism

### **Ik heb in artikelen gelezen dat duurzame producten steeds meer in trek zijn. Geldt dat ook voor duurzaam toerisme?**

Je merkt dat er meer bekend wordt en de media meer aandacht besteedt aan duurzaamheid. Dat geldt ook voor duurzaam toerisme, hoewel dat niet erg veel aan de orde komt, niet op dagelijkse basis. Maar vooral in vakantietijd, zoals de vakantiebeurs wordt er extra op in gespeeld. In vergelijking met 10 jaar geleden is er absoluut meer aandacht voor. Maar dat betekent niet dat iedereen er al mee bezig is om duurzaam op vakantie te gaan, absoluut niet. We hebben daar nog een lange weg te gaan.

### **Ik heb het idee dat er nog niet veel bekend is over duurzaam toerisme. Klopt dat?**

Mensen die al geïnteresseerd zijn in duurzaamheid, die bijvoorbeeld biologische producten kopen en letten op hoe ze het huis duurzamer maken zoals een waterbesparende WC, zijn er ook mee bezig op vakantie. Het is een levensstijl. Voor hen is het normaal om weinig water te gebruiken, zeker als ze in een gebied zijn waar weinig water is. Er is wel al een groep bezig met weinig water gebruiken, respect voor de lokale bevolking, respectvol met de natuur omgaan. Maar het is lastig om degenen die daar nog veel minder mee bezig zijn te veranderen. Als het niet in hun natuur ligt of hun aard ligt om er interesse in te tonen en er mee bezig te zijn, is het heel lastig om dat te veranderen. Het is ook heel lastig om deze boodschap te communiceren, elke doelgroep heeft een andere boodschap nodig.

### **Is er vanuit de Nederlandse overheid stimulering voor duurzaam toerisme?**

Vorig jaar heeft de overheid geld gegeven aan een aantal duurzaam toerisme projecten waaronder ikhebzinnivakantie.nl. Het lastige bij de overheid is dat duurzaam toerisme gedachtegoed en beleid nogal versnipperd is. Economische Zaken houdt zich bezig met toerisme, toerisme is namelijk een economische sector. EZ heeft ieder jaar een beleidsnota voor toerisme. VROM heeft nogal eens milieuprojecten op het gebied van toerisme. Er zijn ook subsidiemogelijkheden voor toerisme, maar dat verandert elke keer weer. Het LNV die richt zich op toerisme in de natuur. En dan heb je ook nog OCW die zich richt op onderwijs. Het is erg versnipperd. In sommige landen heb je een ministerie voor toerisme, maar dat heb je in Nederland niet.

**Is TUI een reisorganisatie die een voorbeeld kan zijn? Zijn ze ver in hun beleid?**

TUI is actief bezig met duurzaam toerisme, ik weet niet wat hoe groot het percentage is van mensen die voor duurzaam kiezen. Bijvoorbeeld in het vliegtuig laten ze een filmpje zien over sekstoerisme, hoe het tegen te gaan. Dat hebben ze samen gedaan met EPAT. Op die manier maken ze mensen bewust om dat tegen te gaan. Seksuele uitbuiting van kinderen, dat vind ik heel goed. De website wijsopwintersport. Ze zijn er zeker mee bezig. Een andere reisorganisatie die ik kan bedenken is Sawadee Reizen en SNP Reizen. De ene reisorganisatie zet het alleen op de internetsite maar doet er verder niets aan, maar een andere is er heel ver mee en doen allerlei projecten. Het is heel verschillend per organisatie.

## Appendix 2 Description of the brands

According to *A Global View* TUI Nederland's brands are the following:

- Holland International (tour operator and franchise travel agency)
- Arke (tour operator and travel agency)
- KRAS (tour operator, direct seller)
- Arke Fly (airline)
- Robinson (tour operator)
- Lastminute.nl (online travel agency)
- Goed Idee Reizen (tour operator).

### Holland International

The slogan is “Wij begrijpen waar *u* heen wilt”. This brand stands for reliability and quality. The package tours can only be booked in ANVR<sup>4</sup> certified travel agencies and their websites, needless to say, these include the Arke and Holland International travel agencies and websites and the TUI Nederland contact centre. Besides, Holland International is the official Dutch agent of Disneyland Resort Paris. On top of that, over 80 franchise travel agencies carry the name Holland International Reisbureau. With its deep assortment, Holland International is one of the largest all round tour operators in the Netherlands. It offers amongst others organised beach holidays, city trips, holidays by car, cruises and circular tours (individually or in a group). Holland International has its own products, namely the Holland VakantieClub and the BarkieKidsClub. These are holiday clubs for families in the destinations around the Mediterranean Sea. The travel agencies of Holland International have blue and red as main colours, just as the logo. The colours red, white and blue, being the colours of the Dutch flag, refer to the Netherlands, likewise orange for Arke. The travel agencies are easily recognised by the signs that contain the logo. In both travel agencies the brochures are displayed behind the desks of the agents. The agents do not wear a uniform. The air hosts do wear a blue TUI uniform.

### Arke

The slogan is “Dacht het wel”. Arke is the trusted and sharply priced brand of TUI Nederland. Arke is a tour operator, but also a travel agency and an Airline. It operates a multi channel policy, this means that they sell the package tours by means of the travel agency, the website and the TUI contact centre. The assortment of the travel agency includes Holland

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<sup>4</sup> ANVR, Algemene Nederlandse Vereniging van Reisondernemingen, the Dutch Association of Travel Agents and Tour Operators

International, ArkeFly, KRAS and Robinson and other selected tour operators. The offer varies from a package tour with an aeroplane to destinations around the Mediterranean Sea, far sun destinations, holidays by car, city trips to winter sports holidays. A joint venture with V&D allows the traveller to book a holiday in a large department store. Arke's travel agencies are recognisable by the orange colour and the logo. Orange is a happy and joyful colour and the symbol of the Netherlands. The interior decorating is predominantly orange as well. Furthermore there are large pictures of smiling people in the sun that reflect a true holiday spirit.

## KRAS

The slogan is "Waarom zou u verder zoeken". Its focus lies on the broad and sharply priced offer. Kras is a typical direct seller; the Internet and newspapers ads are an important communication tool. The larger part of the travellers books their trip by means of the Internet. The offer contains of holidays by car, beach holidays, cultural holidays and specialised products as active holidays, senior holidays and holidays for singles. On top of that, they offer art travels, theme travels, train circular trips and special destinations as Antarctica, Oman, Ethiopia and Mongolia.

## Robinson

Robinson claims to be the brand for the involved 'bon vivant'. Robinson has 25 clubs in and around Europe with a high quality. Meals are served, various sports facilities and entertainment such as music and musicals are offered. Every club has its own target group focus, families, singles, couples or single parents. The Robinson clubs focus on reuse of energy, ecological wastewater purification plants and rubbish avoidance.

## Lastminute.nl

The slogan is "Ga toch weg!". This states claims to sell the cheapest holidays. Through the website of Lastminute.nl the traveller can book a holiday up to six weeks before departure.

## Goed Idee Reizen

Goed Idee Reizen focuses on Christian travellers. The target group for Goed Idee Reizen is 45+ and Jong Idee Reizen targets at young people between 16 and 25 years. The holidays do not have a religious purpose but unites people with a similar philosophy of life.



## Appendix 3 Questionnaire

See following pages for the questionnaire.



## Appendix 4 Overview of Data

Wat is uw geslacht?			
man	#36	36%	
vrouw	#65	64%	
			n=101

Wat is uw hobby? Maximaal 2 aankruisen.			
film	#12	5%	
fotograferen	#6	3%	
knutselen	#5	2%	
kunst/museabezoek	#19	9%	
lezen	#42	19%	
muziek	#32	15%	
reizen	#19	9%	
sport (binnen)	#8	4%	
sport (buiten)	#16	7%	
tekenen/schilderen	#3	1%	
tuinieren	#10	5%	
uitgaan	#7	3%	
verzamelen			
winkelen	#9	4%	
anders:	#14	6%	
			n=219

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Duurzaam toerisme is voor mensen die biologische producten kopen.			
Geheel oneens	#17	20%	
Oneens	#42	48%	
Niet eens, Niet oneens	#14	16%	
Eens	#14	16%	
Helemaal eens			
			n=87

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Duurzame vakantie zijn in de natuur.			
Geheel oneens	#5	6%	
Oneens	#32	36%	
Niet eens, Niet oneens	#19	22%	
Eens	#30	34%	
Helemaal eens	#2	2%	
			n=88

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Een reis met het vliegtuig kan duurzaam zijn.			
Geheel oneens	#10	11%	
Oneens	#19	22%	
Niet eens, Niet oneens	#24	28%	
Eens	#33	38%	
Helemaal eens	#1	1%	
			n=87

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Tijdens een duurzame vakantie moet je kamperen.			
Geheel oneens	#20	23%	
Oneens	#50	58%	
Niet eens, Niet oneens	#15	17%	
Eens			
Helemaal eens	#1	1%	
			n=86

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Omkoping van de lokale bevolking (bijvoorbeeld een douanebeambte bij de grens) kan ook tijdens een duurzame vakantie voorkomen.		
Geheel oneens	#13	15%
Oneens	#23	26%
Niet eens, Niet oneens	#18	20%
Eens	#30	34%
Helemaal eens	#4	5%
		n=88

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Een excursie naar een slangenbezweerder kan op een duurzame reis.		
Geheel oneens	#6	7%
Oneens	#14	16%
Niet eens, Niet oneens	#23	27%
Eens	#41	48%
Helemaal eens	#2	2%
		n=86

Geef bij de volgende stellingen aan in welke mate u het er mee eens bent. Duurzame vakanties zijn duurder.		
Geheel oneens	#3	3%
Oneens	#24	28%
Niet eens, Niet oneens	#22	26%
Eens	#32	37%
Helemaal eens	#5	6%
		n=86

Hoe belangrijk vindt u duurzaam toerisme?		
onbelangrijk	#8	9%
tamelijk belangrijk	#52	60%
erg belangrijk	#24	28%
van doorslaggevend belang	#3	3%
		n=87

Hoe vaak heeft u een duurzame vakantie geboekt?		
nog nooit	#58	67%
5 keer of minder	#15	17%
meer dan 5 keer	#11	13%
altijd	#3	3%
		n=87

Waarom heeft u een duurzame reis geboekt?		
ik vind het belangrijk	#10	37%
degene met wie ik ging vindt het belangrijk	#1	4%
de reis was toevallig duurzaam	#12	44%
geen antwoord	#4	15%
		n=27

Hoe bent u geïnformeerd over de duurzaamheid van uw reis?		
door het reisbureau		
door de reisbrochure	#1	4%
door de website waar ik de reis heb geboekt	#6	23%
ik heb het zelf opgezocht	#11	42%
door degene met wie ik ging	#1	4%
door de reisbegeleider		
geen antwoord	#7	27%
		n=26

Waarom heeft u nog nooit een duurzame reis geboekt?		
ik organiseer zelf mijn reizen	#37	57%
ik vind duurzaamheid niet belangrijk	#2	3%
ik heb er nooit over nagedacht	#16	25%
ik weet niet waar ik dat kan boeken	#2	3%
geen antwoord	#8	12%
		n=65

Overweegt u een duurzame vakantie in de toekomst?		
ja	#59	70%
nee	#25	30%
		n=84

Kruis aan met welke merken u bekend bent. Meerdere antwoorden mogelijk.		
Arke	#63	7%
Club Med	#41	5%
De Jong Intra Vakanties	#54	6%
Djoser	#61	7%
D-Reizen	#58	7%
Extravacanza		
Goed Idee Reizen		
GOGO	#25	3%
Holland International	#62	7%
Hotelplan	#38	4%
Inpakkenenwegwezen.nl	#9	1%
Jiba	#41	5%
KRAS	#59	7%
Lastminute.nl	#30	3%
Neckermann	#57	6%
OAD Reizen	#61	7%
Peter Langhout Reizen	#53	6%
Pharos Reizen	#27	3%
ROBINSON	#7	1%
Sudtours	#30	3%
Sunweb Vakanties	#49	6%
Vrij Uit	#51	6%
		n=878

Geef aan hoe u de volgende merken kent. Als u er geen kent, vink dan het vakje 'niet van toepassing' aan.		
<b>Arke</b>		
uit de media (radio, televisie, kranten, i...	#59	76%
van anderen (vrienden, familie, kennisse...	#2	3%
via het reisbureau	#14	18%
ik werk er of heb er gewerkt		
niet van toepassing	#3	4%
		n=78

Geef aan hoe u de volgende merken kent. Als u er geen kent, vink dan het vakje 'niet van toepassing' aan.		
<b>Holland International</b>		
uit de media (radio, televisie, kranten, i...	#51	64%
van anderen (vrienden, familie, kennisse...	#1	1%
via het reisbureau	#21	26%
ik werk er of heb er gewerkt	#1	1%
niet van toepassing	#6	8%
		n=80

Geef aan hoe u de volgende merken kent. Als u er geen kent, vink dan het vakje 'niet van toepassing' aan.		
<b>KRAS</b>		
uit de media (radio, televisie, kranten, i...	#54	68%
van anderen (vrienden, familie, kennisse...	#7	9%
via het reisbureau	#7	9%
ik werk er of heb er gewerkt	#1	1%
niet van toepassing	#10	13%
		n=79

Geef aan hoe u de volgende merken kent. Als u er geen kent, vink dan het vakje 'niet van toepassing' aan.		
<b>ROBINSON</b>		
uit de media (radio, televisie, kranten, i...	#10	13%
van anderen (vrienden, familie, kennisse...	#1	1%
via het reisbureau		
ik werk er of heb er gewerkt		
niet van toepassing	#65	86%
		n=76

Geef aan hoe u de volgende merken kent. Als u er geen kent, vink dan het vakje 'niet van toepassing' aan. Lastminute.nl		
uit de media (radio, televisie, kranten, i...	#38	49%
van anderen (vrienden, familie, kennisse...	#5	6%
via het reisbureau	#1	1%
ik werk er of heb er gewerkt		
niet van toepassing	#33	43%
		n=77

Doen de volgende merken aan duurzaam toerisme? Als u het merk niet kent, vink dan het vakje 'niet van toepassing' aan. Arke		
ja	#1	1%
nee	#12	15%
weet niet	#63	78%
niet van toepassing	#5	6%
		n=81

Doen de volgende merken aan duurzaam toerisme? Als u het merk niet kent, vink dan het vakje 'niet van toepassing' aan. Holland International		
ja	#3	4%
nee	#12	15%
weet niet	#59	73%
niet van toepassing	#7	9%
		n=81

Doen de volgende merken aan duurzaam toerisme? Als u het merk niet kent, vink dan het vakje 'niet van toepassing' aan. KRAS		
ja	#2	3%
nee	#17	21%
weet niet	#54	68%
niet van toepassing	#7	9%
		n=80

Doen de volgende merken aan duurzaam toerisme? Als u het merk niet kent, vink dan het vakje 'niet van toepassing' aan. ROBINSON		
ja	#6	7%
nee	#4	5%
weet niet	#34	42%
niet van toepassing	#37	46%
		n=81

Doen de volgende merken aan duurzaam toerisme? Als u het merk niet kent, vink dan het vakje 'niet van toepassing' aan. Lastminute.nl		
ja		
nee	#12	15%
weet niet	#47	58%
niet van toepassing	#22	27%
		n=81

Kent u (andere) reisorganisaties die aan duurzaam toerisme doen?		
nee	#72	89%
geen antwoord	#9	11%
		n=81





## Appendix 5 Top ten of primary impression

Ranking	Word	Nr of times mentioned
1	Natuur	29
2	Fietsen, groen	15
3	milieu	13
4	Ecologisch, eerlijk, openbaar vervoer, rust	7
5	milieuvriendelijk	6
6	Cultuur, kamperen, kleinschalig, respect, verantwoord, vliegen	5
7	Eco, fiets, fietsvakantie, niet vliegen, trein	4
8	Bevolking, dichtbij, duur, ecotoerisme, lokale bevolking	3
9	Aangenaam, bewust, biologisch eten, buitenland, buzzword, co2, continuïteit, degelijk, dieren, energiezuinig, geld, gezond, lopen, milieubewust, neokolonialisme, nuttig, primitief, puur, reizen, rustig, vakantie, ver, ver weg, verblijf in eigen land	2
10	Aandacht, afvalscheiding, al gore, armoedebestrijding, authentiek, autochtoon, Azië, back-to-the-roots, bekijken, betrouwbaar, bewaren van eigenheid, bio, boerderij, bomen planten, buiten, bussen, China, co2 neutraal, co2 neutraal reizen, co2 uitstoot, Co2 vervanging bij vliegwezen, cradle2cradle, delen, derde wereld landen, dicht bij huis, dure vakantie, duurder, duurzame accommodatie, duurzame investeringen, eco, footprint, eco-boom, ecologische voetstap, ecologische waterverwarming, economie, Een vakantie waar je veel waar voor je geld hebt, eenvoudig, eerlijke prijs, Eigen land, eiland, energiebesparing, fair, fair-trade, fietsvrienden, floortje derving, gedragsregels voor toeristen, geen afval achterlaten, geen dierenleed, geen eendagsvlieg, geen idee, geen kinderarbeid, geen overbodige bebouwing, geen schade aan natuur, geen vliegtuig, Geiten wollen sokken vakantie, genieten, gewoon, Gewoonten van het land ervaren, gezamenlijk reizen, globalisering, goed, goed doel, goed voor de bevolking, goed voor economie ontwikkelingsland, goed voor het milieu, greenpeace, harmonie, Het heel lang uithouden met heel weinig geld, hotel, houdbaarheid, hout, hype, ideaal, ik heb het opgezocht nu, in eigen land, inheems, intact houden van natuur, cultuur, investeren (lokaal), inzet lokale hotels, toeristenorganisaties, Je mengen in de lokale bevolking, Je vakantie zo plannen dat je zuinig omgaat met de grondstoffen van de aarde, jeugdherberg, juttenzak, kamperen bij de boer, Kamperen in de natuur, Kampvuurtjes maken, kerken, kleinschaligheid, klimaat neutraal, koraalriffen, kosten, kringloop, kwaliteit, laagbouw, langdurig, langtermijn, linnk, lokaal, lokale bevolkingvriendelijk, lokale producten, lopen, marketing, materialen, Minder, modewoord, moestuin, Mozambique, nadenken, Natuurreservaten, niet belastend, Niet met het vliegtuig maar op de fiets,	1

nodig, novib, omgeving niet verstoren, omgeving respecteren, onbewoond, onconventioneel, ontbossing, ontwikkelingsland, onzichtbaar toerisme, onzin, pffffff, plaatselijk, profijtelijk, recycling, Respect voor de natuur in het land waar je verblijft, rondleiding, saai, schoon, schoonhouden, selectief vliegen, smog, sneeuw, soberheid, Sociaal, Sporten in de natuur (zonder motoren), steden, stoffig imago, strand, ten goed komend aan lokale bevolking, terugkomende toeristen, Tijd, toekomst, trend, vakantiespreiding, varen, vasthouden aan de eigen aard van het bezochte land, vegetarisch eten, Ver weg, vervuiling, visie, vliegtax, vriendelijk, wandelvakantie, water, weinig vliegen, weinig watergebruik, yoga, zee, zinvol, zomer, zon, zonder vliegtuig, zonnepanelen, zonzeestrand, zorg, zuinig, zwerfafval.

## Appendix 6 Words per Category

Respect & Honesty	Environment-friendly
Armoedebestrijding	Afvalscheiding
Authentiek	Bio
Back to the roots	Bomen planten
Betrouwbaar	CO2
Bevolking	CO2 neutraal
Bevolkingsvriendelijk	CO2 uitstoot
Bewaren van eigenheid	CO2 vervanging bij vliegreizen
Bewust	Cradle 2 cradle
Delen	Duurzame accommodatie
Dieren	Duurzame investeringen
Economie	Eco
Eerlijk	Eco footprint
Eerlijke prijs	Ecologisch
Fair	Ecologische voetstap
Fair-trade	Ecologische waterverwarming
Gedragsregels voor toeristen	Ecosysteem
Geen afval achterlaten	Ecotoerisme
Geen dierenleed	Energiebesparing
Geen kinderarbeid	Energiezuinig
Goed doel	Geen overbodige bebouwing
Goed voor de bevolking	Geen schade aan de natuur
Goed voor de economie ontwikkelingsland	Goed voor milieu
Harmonie	Groen
Intact houden cultuur	Intact houden natuur
Investeren (lokaal)	Je vakantie zo plannen dat je zuinig omgaat met de grondstoffen van de aarde
Inzet lokale hotels, toeristenorganisaties	Kleinschalig
Je mengen in de lokale bevolking	Kleinschaligheid
Koraalriffen	Klimaatneutraal
Lokaal	Laagbouw
Lokale bevolking	Milieu
Lokale bevolkingvriendelijk	Milieubewust
Lokale producten	Milieuvriendelijk
Nadenken	Moestuin
Onzichtbaar toerisme	Natuur
Respect	Niet belastend

Respect voor de natuur in het land waar je verblijft	Omgeving niet verstoren
Sociaal	Omgeving respecteren
Ten goede komend aan de lokale bevolking	Ontbossing
Vakantiespreiding	Recycling
Vasthouden aan de eigen aard van het bezochte land	Schoon
Verantwoord	Schoonhouden
Vriendelijk	Smog
Weinig waterverbruik	Vervuiling
Zorg	Zonnepanelen
Zwerfafval	Zuinig

Activity	Location
Bekijken	Autochtoon
Boerderij	Azië
Buiten	Buitenland
Cultuur	China
Fiets	Derde wereldlanden
Fietsen	Dichtbij
Fietsvakantie	Dichtbij huis
Fietsvrienden	Eigen land
Gewoonten van het land ervaren	Eiland
Kamperen	In eigen land
Kamperen bij de boer	Inheems
kamperen in de natuur	Lokaal
Kampvuurtjes maken	Mozambique
Kerken	Natuurreservaten
Lopen	Onbewoond
Rondleiding	Ontwikkelingsland
Sneeuw	Plaatselijk
Sporten in de natuur (zonder motoren)	Rust
Steden	Rustig
Strand	Ver
Varen	Ver weg
Wandelen	Verblijf in eigen land
Wandelvakantie	
Zee	
Zon	
Zonzeestrand	

<b>Ideology</b>	<b>Transport</b>
Al Gore	Bussen
Biologisch eten	CO2 neutraal reizen
Eenvoudig	Geen vliegtuig
Floortje Delsing	Gezamenlijk reizen
Geitenwollen sokken vakantie	Groepen
Gezond	Niet met het vliegtuig, maar met de fiets
Goed	Niet vliegen
Goed doel	Openbaar vervoer
Greenpeace	Reizen
Juttenzak	Selectief vliegen
Kringloop	Trein
Llink	Vliegen
Minder	Vliegtax
Novib	Vliegtuig
Onconventioneel	Weinig vliegen
Primitief	Zonder vliegtuig
Puur	
Soberheid	
Vegetarisch eten	
Visie	
Yoga	

<b>Attitude</b>	<b>Money</b>
Aangenaam	Dure vakantie
Buzzword	Duur
Degelijk	Duurder
Eco-boom	Geld
Genieten	Het heel lang uithouden met heel weinig geld
Gewoon	Kosten
Hard nodig	Vakantie waar je waar voor je geld hebt
Hype	
Kwaliteit	
Marketing	
Modewoord	
Neo-kolonisatie	
Nodig	
Nuttig	
Onzin	

Saai	
Stoffig imago	
Trend	
Zinvol	

Continuance	Other
Continuïteit	?
Geen eendagsvlieg	Aandacht
Houdbaarheid	Geen idee
Langdurig	Globalisering
Lange termijn	Hotel
Terugkomende toeristen	Hout
Toekomst	Ideaal
	Ik heb het opgezocht nu
	Jeugdherberg
	Materialen
	Pfff
	Profijtelijk
	Tijd
	Vakantie
	Water
	Zomer