The Willingness of Tourists on Tenerife to Support Environmentally Responsible Whale Watching

(Wa(h)l-Heimat, 2011)

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by

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Abstract

Tenerife, one of the Canary Islands, is a popular European whale watching destination with around 30 boats offering trips all year around. Even though the whale watching legislation of the Canary Islands is relatively strict, the industry is still coming short on educational, scientific and conservation benefits.

Buena Proa ONG is a Canary Islands-based organisation for the conservation of cetaceans that developed an accreditation to improve the quality of Tenerife whale watching for the cetaceans as well as for the tourists. The accreditation project is called Wa(h)l-Heimat and consists of a contract between whale watching boats and Buena Proa. Participating boats agree to have tour guides participate in a training to improve information that is provided during the tour, make use of educational material that is provided by Buena Proa, use a recycling system, adhere to the whale watching legislation including approaching manoeuvres, regularly have a researcher on board for research for the conservation of cetaceans and pay €1 per passenger to Buena Proa to cover the costs for personnel, training and educational material. Currently, the implementation has not been implemented on any of the boats due to disagreements on who should be paying the Euro.

The aim of this project was an analysis of how important the whale watching tourists of Tenerife find the accreditation factors and to what extent they are willing to pay for it as well as finding out how this information can be used in the whale watching operators' marketing mix. The main research question is:

To what extent are whale watching tourists environmentally conscious and willing to pay a higher price for a more responsible whale watching activity and how can the accreditation factors of these tourists be translated into the marketing mix of the accredited whale watching tours?

For the first part of the research question, a survey on board two whale watching vessels, the Freebird One and the One For You, both from the Freebird One organisation, was conducted.

For the second part, the results from the survey were combined with literature research concerning marketing for tourism.

The survey was conducted during three weeks in March and April 2011, gathering 907 questionnaires during 22 individual whale watching tours. The objective of this survey was to analyse whether the Euro could be paid by the passengers without the boats losing customers due to the slightly increased prices.

Tourists from 20 different nationalities participated in the survey with the majority of all whale watches coming from The United Kingdom, Germany, The Netherlands and Belgium. A slight majority of tourists (58%) was female, with the remaining 42% having been male. The age group of 41-55-year-olds was most common (32%), followed by 56-70-year-olds (25%), 26-40-year-olds (20%), 25 and under (17%) and 71 and over (5%).

The tourists were asked to rate the importance of the various accreditation factors (presence of a nature guide, recycling on board the whale watching vessel, research on board for the conservation of cetaceans, educational material for children and adults, the boat complying with the rules for approaching whales and dolphins) as well as of environmental conservation in general and in whale watching. The results showed that between 60 and 70 % of the tourists found environmental conservation in general and in whale watching, as well as the boats complying with the rules very important. Another 20-25% found these factors important. The presence of a nature guide, recycling and research were found very important by just over 40% and important by another 35-40% while educational material was found very important by around 25% and important by around 40%.

The given importance varied slightly between nationalities with the United Kingdom and Germany finding the factors slightly more important than The Netherlands and Belgium. The upper and lower age groups (71 and above, 25 and under) found most factors slightly less important than the middle age groups while no difference between genders was found.

Tourists were also asked to indicate whether they were willing to pay a total of €1 on top of the ticket price for all of the accreditation factors. Tourists indicated whether each of the factors was worth paying for. 93.7% of all tourists that participated in the survey were willing to pay for at least one of the factors, 33% found all six factors worth paying for. Tourists were most willing to pay for the presence of a nature guide, research for the conservation of cetaceans and the boats complying with the rules.

From these results it can be concluded that tourists are willing to pay for the accreditation factors as they find them important. The extra Euro that is asked from the boat operators that participate in the accreditation can therefore be added to the ticket price without significant losses of customers.

It is assumed that these results are relevant not only for the catamarans Freebird One and One For You but also for other boats of medium and large size, especially those working with tour operators as important intermediaries due to the similarities in types of tourists.

It is recommended to conduct further research into the attitudes of tourists of other whale watching boats on Tenerife to verify he assumption that the results of this survey are representative for the whole whale watching industry of Tenerife. The whale watching boats are recommended to participate in the accreditation as the survey has clearly shown that tourists find the accreditation factors important and are generally willing to pay for them, leading to no financial disadvantages for accredited boats as the costs can be transferred to the tourists.

Acknowledgements

For our final bachelor thesis assignment we chose a subject that we both were very interested in: a combination of social and ecological aspects of whale watching. The location of the main research was Tenerife, Canary Islands, Spain, due to its mature and extensive whale watching industry. Through some research on the internet we found out about 'Buena Proa', an NGO on Tenerife dedicated to the conservation of dolphins and whales that had just recently started a new project called: 'Wa(h)l-Heimat', which was elected "Project of the Year" by the German organisation for environmental improvement on touristic areas, "Futouris". During the weeks before the official start of our research period in February, our assignment was shaped into a research that would support 'Wa(h)l-Heimat' and therefore improve the conservation of dolphins and whales off the southwest coast of Tenerife.

During the 10 weeks we spent on Tenerife, María del Mar Cañado, the head of Buena Proa, supported us in many ways. She made it possible for us to be on board of the boats 'Freebird One' and 'One for You' and this way gather over 900 questionnaires that would give us more insight in whether or not tourists would be willing to pay €1,- on top of the ticket price to help establish Bunea Proa's accreditation which includes a nature guide; educational material and a recycling system on board.

Unfortunately, after having planned for the accreditation to be implemented on the first boats on the first of May, the project got cancelled, sad news for Buena Proa. Our project is written based on all that has happened during our research time spent on Tenerife, the knowledge we gained and the experiences we had. This project also gave us the opportunity to learn more about how marketing can be related to the conservation of dolphins and whales.

We want to thank Alejandro Hidalgo Perez for his dedication and heart for this project and to fit in meetings with us, despite his busy schedule.

We would also like to thank María del Mar Cañado for all her help and guidance, the countless ideas she gave us and a very warm welcome. Also we would like to extend our appreciation to the 'Freebird One' and 'One for You' crew for enabling us to do our survey on board and giving us many amazing whale watching experiences with a lot of laughter.

Finally we would like to thank our supervisors from University Van Hall Larenstein for guiding us and helping our research with their critical and positive feedback and support in moments when things were not going as we had hoped.

We hope our efforts will help raise awareness and promote the accreditation of whale watching tours on Tenerife and that the project 'Wa(h)l-heimat' will be continued. We have been working on this project with great dedication and we wish Buena Proa all the best of luck with its future efforts for the conservation of dolphins and whales on Tenerife.

Katrin Markull & Brigitte Kessels, June 2011

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1. Introduction

The whale watching legislation of the Canary Islands "can be considered as one of the most complete worldwide" (Elejabeitia & Urquiola 2009), including compulsory approach patterns, registration of all whale watching vessels and other aspects of behaviour around cetaceans which are defined in three legislative documents that whale watching operators have to adhere to[1]. However, there is still room for improvement when it comes to environmental responsibility and education on the whale watching boats.

Hoyt (2003) said about the Canary Island whale watching industry that there were "too few educational, scientific and conservation benefits for the community and for the visiting whale watchers (…) more boats need to carry naturalist guides if Canary Islands whale watching is to meet the standards set in other parts of Europe". In 2011, eight years after Hoyt's publications, the Canary Islands whale watching industry still seems to be facing issues that could be improved if different parties work together.

1.1. Area Description

Tenerife and the other Canary Islands are located in the Atlantic ocean about 200 miles west of Morocco and the Sahara Desert. Tenerife is the largest of the Canary Islands and is controlled by Spain although it has its own government (Tenerife Tourist Guide, 2011).

Figure 1: Map of Tenerife

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[1] A summary of the legislation can be found in Appendix G.

1.3   Buena Proa

Buena Proa ONG is an organisation for the study and conservation of marine life. It focuses on cetaceans and was founded in Lanzarote (Canary Islands) in 2008. In order to raise social awareness and collect data for the protection of endangered species, the organisation develops scientific projects as well as educative programs (Buena Proa ONG, 2011). The recent appearance of notorious skin diseases in many of the resident animals indicated an immunological decrease in the creatures and called for urgent action.

Buena Proa also developed a new project named 'Wa(h)l-Heimat', the project has been supported by Futouris, TUI-Deutschland, La Caixa and Ayuntamiento de Arona, from 2008 to 2010. In this period the skin diseases of the resident cetacean population were studied and scientific research took place on board of different whale watching boats (Bunea Proa ONG, 2011).

> *"Because isolated scientific studies go nowhere in terms of conservation, Wahl-Heimat is a collaboration between crews, skippers, boats' owners, scientists and tour-operators. We work together with the closest human activity in the area, with the firm conviction that the implementation of some changes will raise very good results to the animals, the passengers on board and anyone who dares to get involved in this new project."* (Buena Proa ONG, 2011).

The aim of project Wa(h)l-Heimat is "to turn the whale watching boats into platforms for research, divulgation and good practices to protect the animals in the short and long time term" (Bunea Proa ONG, 2011). Buena Proa aims to reach these goals by implementing an accreditation which then will lead to more responsible whale watching. The implementation phase of the project was funded by Futouris, a German organisation of major tour operators for climate protection, environmental and ecological conservation that voted Wa(h)l-Heimat as the project of the year. However, to cover the financial side of this project in the future, there has be found an alternate method of funding.

One issue mentioned by whale watching boat owners of Tenerife was that "the tourism sector of Tenerife is mainly comprised of what is known as 'sun and beach tourists' who 'incidentally' participate in whale watching with little concern for the environmental value of excursions" (Translated from Buena Proa ONG (Year Unknown))

To assess the truth of this statement, research into environmental attitudes of whale watching tourists on Tenerife is necessary.

1.2   Problem Description

On the 26th of January 2011 Buena Proa held a meeting, where the accreditation was explained to all boat owners, skippers, sellers and tour-operators. The outcome of the meeting was that all parties agreed on the positive outcome of Buena Proa's standards on board, but they did not agree on the financial side of this accreditation. To get the accreditation, which includes having Buena Proa's staff regularly on board; receiving education for tour guides and education material for tourists; controlling and promoting of work, Buena Proa ONG asks that one euro is paid per passenger. The financial aspect will be the most difficult part of the project. Since the start of the Wa(h)l-Heimat project there has been contact with ' Thomas Cook' and 'TUI' to find

out about the possibilities for them to pay the amount asked per person as a whole, or partially. For boats that do not work with tour-operators, especially smaller boats, the ONG is looking for other options to get this euro per passenger, such as selling educational material on board the vessels (Del Mar Cañado, 2011). The accreditation was supposed to be implemented on the first boats in May 2011. However, a few weeks before the set date the implementation of the accreditation was cancelled due to disagreements between Buena Proa, the boat operator and a tour operator. This might partly be due to the assumption that most tourists on Tenerife have little concern for the environment (see Chapter 1.2) and would not find the accreditation beneficial.

1.3   Research Aim

A description on how environmentally conscious whale watching tourists on Tenerife are and whether and under which conditions they are prepared to pay a higher price for a more environmentally responsible whale watching experience.

1.4   Research Questions

Main research question:
To what extent are whale watching tourists environmentally conscious and willing to pay a higher price for a more responsible whale watching activity?

1. **How environmentally conscious are whale watching tourists on Tenerife?**
    ➢ Who are the tourist on board?
    ➢ Which are the main motivations for tourists on Tenerife for choosing the whale watching tour operators?
    ➢ How many tourists have been whale watching before?
    ➢ Where or how do the tourists purchase their tickets?
    ➢ How much do tourists pay for their tickets?
    ➢ To what extent do tourists find the standards of the accreditation and environmental conservation important and which aspects of the accreditation do the tourists find most important?
    ➢ Is there a relationship between different demographic and geographic groups of tourists (age, gender, nationality) and the importance of environmental conservation and the accreditation factors?
    ➢ Is there a relationship between the type of tour a tourist participates in (Eco tour, basic tour, VIP tour, standard tour, Masca tour)[2] and the importance of environmental conservation and the accreditation factors?

2. **Are whale watching tourists on Tenerife prepared to pay a higher price for a more environmentally responsible whale watching experience?**
    ➢ For which of the factors involved in the accreditation are the tourists willing to pay €1,- on top of the ticket price?

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[2] Please see Chapter 5.3.2 for details on the different tours.

➢ Is there a relationship between different demographic and geographic groups of tourists (age, gender, nationality)and whether and the extent to which the tourist is willing to pay €1,- more for an accredited tour?
➢ Is there a difference between different demographic groups of tourists (age, gender, nationality)and the number of factors that tourists are willing to pay for?
➢ Is there a relationship between the type of tour a tourist participates in (Eco tour, basic tour, VIP tour,…) and the willingness to pay for the accreditation factors?

1.5   Research Context

If the outcome of the research shows that tourists are willing to pay more for their whale watching tour if this means a greater level of conservation of cetaceans as well as education for the tourists, the costs for the Buena Proa ONG accreditation can, at least partly, be covered by higher prices for the whale watching tours. This might motivate more boat operators to participate in the accreditation as they see the benefits that it can bring to them. As the financial aspect seems to be the main restrain for the success of the Wa(h)l-Heimat project, this might help to convince boat operators as well as potential sponsors of the project to help implement the accreditation standards. Boat operators fear that a higher price might discourage tourists. The research will show whether this fear is legitimate or whether and under which conditions tourists are willing to pay a Euro extra for an accredited whale watching experience.

The project is therefore supposed to be a first step for reaching the overall goal of 'a Tenerife whale watching industry that takes more care of the conservation of the cetaceans' and to get a better insight in the options leading towards the implementation of Bunea Proa's accreditation, including financing methods and promotional aspects that could be used by boats that participate in the accreditation to communicate this to potential consumers. To reach these goals Buena Proa will need to know whether tourists are prepared to pay one euro extra, if there are difference between different types of tourists and which of the accrediation aspects are most important to the tourists. To make this project successful and realistic, meaning boats that are willing to get an accreditation and therefore agree on all aspects including a higher price per ticket will not lose money/their customers, it is important to find out how the tourists evaluate the different accreditation factors in order to implement the accreditation into the boats' and intermediaries' marketing plans[3].

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[3] The performed literature study on relevant marketing aspects can be found in Appendix H

1.4   Guide to the Reader

1. The second part of this report consists out of the results. First, chapter 3 will give the 'General Results' of the literature study, including a description of the whale watching industry in general, the whale watching catamarans Freebird One and One for You, a definition of responsible whale watching, the development of the questionnaires and Bunea Proa's strategy and its results. Secondly the outcomes of the questionnaires will be described in chapter 4 'Statistical Results' using graphs and figures created with SPSS, this part will be divided in paragraphs that will give answers to the research questions.

2. The last part will start with the 'Discussion', chapter 6, which will describe the significance of the results and suggest biases that occurred, furthermore this part consist out of the 'Conclusion and Recommendations', chapter 7,which describe the outcome of the research questions which then are used to make future recommendations for whale watching boats and further research.

3. The report will be completed with a reference list and appendices.

2. Methods

This chapter describes the methods that were used throughout the research.§2.1 describes the first steps leading to the establishment of a questionnaire, after which §2.2 will elaborate on the sampling methods. §2.3 will focus on the analysis of the data §2.4 will elaborate on the recommendations and conclusion.

2.1   Developing a Questionnaire

First of all the whale watching industry was described according to the following questions:
- What are the main languages/nationalities on board of the whale watching vessels?
- How many people are there on board on average every day?
- What types of tours are there?
- What types of boats will be included in the research by handing out questionnaires on board?
- From where and how many times a day do these boats depart?

These questions were answered partly through a literature study, but specific information on boat schedules and capacity was gathered on Tenerife by consulting boat owners and marketing staff.

Several factors of the whale watching industry of Tenerife had to be studied to formulate the most efficient questions for the survey. The questions in the questionnaire had to give sufficient information to answer two sub questions derived from the research aim:
1. How environmentally conscious are whale watching tourists on Tenerife?
2. Are whale watching tourists on Tenerife prepared to pay a higher price for a more environmentally responsible whale watching experience?

One of the main research questions was to find out how important tourists find different "environmental factors". These factors were based on the factors within the accreditation with the factor: 'Environmental Conservation in General' as means to define whether there is a difference between conservation in general and in whale watching.
The following factors were used:
- Environmental Conservation in General
- Environmental Conservation in Whale Watching
- The Presence of a Nature Guide on Board Providing Information
- Recycling on Board
- Research for the Conservation of Whales and Dolphins on Board
- Educational Material for Children on Board
- Educational Material for Adults on Board
- The Boat Complying with the Rules for Approaching Whales and Dolphins

Tourists were asked to rate the importance of these eight factors on a scale from 1 (very important) to 5 (very unimportant). They were also asked to indicate whether they would be

willing to pay a total of €1,- on top of the ticket price for six of the environmental factors separately to be able to answer the second sub research question.

2.2   Sampling Methods

The survey was conducted on the two boats Freebird One and One For You that both belong to the Freebird One organisation (more information on the boats can be found in Chapter 3.2. The survey was announced by the tour guide and the researchers asked all tourists personally whether they were willing to participate in the research. This way, the sampling can be assumed to have been random as all tourists had the same chance of being asked to participate. The questionnaires were filled out individually by the tourists.

Table XXX shows the respective margins of percentages with a sample of 900. It was decided to collect 900 questionnaires to reach the accuracy mentioned in the table.

Table 1: Accuracy of statistical results

Percentage	10	20	30	40	50
Margin	8.31-11.69	17.75-22.25	27.42-32.58	37.24-42.76	47.18-52.82

For more information on sampling please refer to Chapter 3.5.

2.3   Data Analysis

To get a better insight into the attitudes of different groups of tourists, the demographics of the tourists, their motivation for taking part in a whale watching tour, their previous experience in whale watching and the channels used for ticket purchase were analysed, using frequency tables. For a better visual presentation, different charts (e.g. pie chart and bar chart) were used. The data was analysed using the statistical analysis program SPSS. All answers were coded using numbers.

A frequency table was built showing the percentages of importance given by the tourists per environmental factor. On top of that were crosstabs in combination with Chi Square Tests used to check the data connections found between given importance and different age groups, nationalities and genders on risk of the found connections being coincidental. For this purpose, only the nationalities represented strongest were used.

Further, to get the clearest and best analysable image of the results, the importance ratings were combined to three instead of five categories. 'Very important' and 'Important' were taken as one category 'Important', 'Neither important nor unimportant' remained the same and 'Very unimportant' and 'Unimportant' were combined as one category 'Unimportant'. This was done to reduce the number of combinations between groups of tourists and given importance. Due to the limited number of cases, five importance categories would have produced too many expected values smaller than 5.

In the last question, tourists were asked to indicate whether they would be willing to pay a total of €1,- on top of the ticket price for six of the environmental factors separately. The tourists were given the choice between 'Yes' and 'No' for the factors:
- The Presence of a Nature Guide on Board Providing Information
- Recycling on Board

- Research for the Conservation of Whales and Dolphins on Board
- Educational Material for Children on Board
- Educational Material for Adults on Board
- The Boat Complying with the Rules for Approaching Whales and Dolphins

The outcomes of this question were analysed using frequency tables showing general willingness to pay and cross tabs with Chi Square Tests to show possible connections between willingness to pay and different age groups, nationalities and genders as well as between the participants of different types of tours.

A confidence interval of 95% was used for all connections.

In the discussion section, the outcomes will be compared to other surveys of whale watching tourists to get a better image of the worldwide attitudes of whale watching tourists.

2.4   Gathering and Processing Data for the General Results

In order to learn more about the whale watching industry of Tenerife, the researchers took part in whale watching tours on 4 different boats, including the two boats the research was conducted on (Freebird One, One For You) and two other boats of medium and large sizes, talked to the crews on board and made a list of which boats work with which tour operators by looking at tour operators' folders in different hotels. Information on prices was gathered by reading the tour operators' folders, talking to independent sales people and directly from the boat operators. Due to the sensitivity of the financial aspects it was decided to only name a few prices as an indication and not include the whole price list.

Further information was gathered in meetings with Maria del Mar Cañado and Alejandro Hidalgo who provided the research with detailed information on Buena Proa and the Tenerife whale watching industry.

3. General Results

This chapter will firstly give the results of the literature study, observations and practical research on Tenerife. To describe the whale watching industry on Tenerife, a short description of numbers of boats and capacities will be given. It will then elaborate on the establishment of the questionnaire and will finally describe Buena Proa's strategy and the results of this strategy that effected and shaped this project.(§3)

3.1   The Whale Watching Industry of Tenerife

Tenerife has approximately 30 boats that are exclusively dedicated to whale watching. These are boats with a capacity that can vary from 15-20 people up to over 150 people per boat. Some of these boats on Tenerife work together with tour operators, while others do not. The most prominent reason for the boats not to bind with these tour-operators is the fact that they are asked to pay a high percentage of the ticket price for this partnership (Del Mar Cañado, M, 2011).

For smaller boats it is usually not possible to work with large tour operators due to capacity issues as tour operators are dependent on larger capacities to be able to offer tickets to a large number of tourists.

The whale watching companies are owned by boat owners and each boat has a crew consisting of the sailor(s) as well as one or several tour guides. The trips are sold directly by the whale watching companies, by tour operators (e.g. TUI) at the accommodation, on cruise ships, online or by independent sales people.

There are a few large whale watching boats (around 10% of all whale watching boats of Tenerife) with a capacity of more than 100 people which are working closely with tour operators. The catamaran Freebird One belongs to this group of boats and is probably representative for around three other boats with a similar capacity and distribution strategy. Due to the large passenger numbers, the few large boats represent a relatively large proportion of all tourists participating in whale watching on Tenerife.

The One For You belongs to the boats with a medium capacity of around 40 to 100 passengers. Around 40% of the whale watching boats of Tenerife belong to this category, with most of these boats working with tour operators.

Around half of the whale watching boats have a capacity of up to 40 passengers. These boats usually do not work with tour operators and only sell via direct selling or independent sales people. Some of the smaller boats are also focused on offering charter tours for whale watching.

3.2   Freebird One and One For You

Freebird One is a whale watching operator currently offering trips on the boats Freebird One and One 4 You. Depending on how many people have signed up for a whale watching tour, either of the boats is chosen for the tour. In summer, both boats are usually used daily due to the higher demand. Unless stated differently, Freebird One will in this report stand for both

boats of the company. Both boats are sailing catamarans, the Freebird One has a capacity of a 196 people while the One 4 You is smaller with a capacity of around 60 people. Both boats offer netting areas in the front. On all tours, food and drinks as well as a hotel pick-up service are included.

Different types are offered. The basic tour is a 3 hour trip including a sandwich and drinks. On this trip, the boat firstly sails offshore between the island of Tenerife and La Gomera to spot the whales. After having seen the whales and/or dolphins, the boat sails to a bay close to Las Americas for a snorkeling and swimming stop. The boat then sails back to Puerto Colon.

The standard tour is similar to the basic tour but here a more extend buffet lunch is provided. On the TUI Eco tour, the programme is similar but with more specific ecological information in German as the tour is only for guests of TUI Germany.

The Thomson VIP tour is only for Thomson UK tourists and usually offered in upper-class hotels. On this tour, a maximum number of 55 passengers is allowed, giving the tourists more space on board. On top of the standard drinks, champaign is included in the price and the lunch is slightly different. No children are allowed on this tour to ensure the quiet and relaxed atmosphere of upper-class travellers.

The Masca tour is a 4,5 hour tour that first takes the tourists offshore to between Tenerife and La Gomera and then to the impressive Masca cliffs with a swimming stop in Masca Bay. The lunch is the same as for the standard tour.

3.3   Responsible Whale Watching

The Whale and Dolphin Conservation Society, the "leading global charity dedicated to defending whales and dolphins from the threats that they face" (Whale and Dolphin Conservation Society 2011) has set some criteria for whale watching. The criteria are to be met for "whale watching to be truly responsible and sustainable to cetaceans and the marine environment, and truly beneficial to passengers, operators and communities" (Lott, Williams-Grey & Simmonds, year unknown).

These criteria are currently implemented by some high quality whale watching operators in the world while the majority of commercial whale watching still "involves the targeting of specific cetacean communities that are repeatedly sought out for prolonged, often close up encounters" (Lott, Williams-Grey & Simmonds, year unknown)

The criteria are:

1. "A prime recreational and educational experience for participants which motivates them to care about cetaceans and the sea and to work for marine conservation;

2. An experience that seeks to reduce the impact on whales, so that whales are watched with the lightest 'footprint' possible;

3. Opportunities for researchers to gather scientific information and disseminate findings to managers and the public;

4. An experience built around a naturalist or nature guide who can provide accurate information, help to find the whales and describe their behaviour, and successfully build the bridge between the urban participant and the sea;

5. The active involvement of the community or region in its work, enabling communities and regions to have a financial as well as a personal interest in whale watching and the conservation of cetaceans and the sea."

(Lott, Williams-Grey & Simmonds, year unknown)

Not all of these factors are fulfilled by the Whale Watching industry of Tenerife. The Wa(h)l-Heimat project would improve these short-comings and lead to a more responsible whale watching activity.

3.4   The Wa(h)l-Heimat Project

'Wa(h)l-heimat' is a new project of Buena Proa and was founded for the conservation of dolphins and whales off the southwest coast of Tenerife. It was elected "Project of the Year" by the German organisation for environmental improvement on touristic areas, "Futouris". Wa(h)l-Heimat focuses on working together with all stakeholders involved in the whale watching activities on Tenerife, including sailors, biologists, skippers and tour operators that participate in the accreditation.

It also involves an accreditation program that

"will assure the implementation on board of the following standards:

1.   Training for crews on marine diversity and education program for passengers.
2.   Permanent research on board.
3.   Development of Good Practices.
4.   Passengers' involvement on animals' conservation.
5.   Active support to the sustainability of Wa(h)l-Heimat."

(Buena Proa ONG 2011)

The Environmental Quality Accreditation of the Wa(h)l-Heimat project addresses whale watching issues and rewards boat operators that stick to certain standards with the accreditation certificate.

There are eight specific aspects of the Wa(h)l-Heimat agreement that Buena Proa makes with the whale watching operators.

1. Buena Proa ONG will provide the whale watching operators with educational material as well as seminars in which tour guides concerning different aspects of whale watching. The guides of whale watching tours have to attend the seminar and make use of the educational materials on board. This will improve the chances of a whale watching tour sparking the tourists' interest for the biodiversity of the Canary Islands and improve the awareness for the protection of cetacean populations through offering more in-depth and interesting information on cetaceans.

2. Buena Proa ONG will develop and provide educational material about the whales while the boat operators will make use of the material and tour guides on the trips will give a talk about the whales that can be observed from Tenerife on all tours. According to Buena Proa ONG, environmental education on board is important for an "understanding and greater enjoyment of the passengers on board, as well as their involvement in environmental conservation" (translated from Buena Proa ONG 2011).

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3. All vessels will take part in research by collecting data of all sightings of cetaceans and hand the data over to Buena Proa ONG to be analysed. The research is "considered an essential point both for the status of the animals and to ensure sustainable development and business continuity" (translated from Buena Proa ONG 2011).

4. The vessels will develop ´Good Practices` on board, including specific rules for approaching cetaceans, recycling, assisting stranded or injured animals and the reduction of noise.

5. All vessels agree to comply with current legislation at all times (currently most importantly for whale watching: Decree 1727/2007 and Decree 178/2000).

6. Buena Proa ONG will conduct at least six checks of the compliance to rules 1-5 each year. If a vessel does not comply with any of the rules, a 2-month period applies for improvement. If no improvements have been made after that period, the accreditation will be canceled for the vessel concerned.

7. Buena Proa ONG will communicate the accredited vessels publicly in different media channels which can be seen as promotion for the vessels participating in the Wa(h)l-Heimat project. Buena Proa ONG will also cite the sources of all scientific material published and name all vessels participating in the research program.

8. The implementation of the Wa(h)l-Heimat project was financed by Futouris. After the implementation phase, all vessels participating in the accreditation will have to pay € 1 per passenger for the accreditation so that the project can continue, covering costs for e.g. staff, promotion and educational materials.

(Buena Proa ONG 2011)

3.5   The Questionnaire

The aim of the survey was to find out to what extend whale watching tourists on Tenerife find certain environmental factors important and whether they are willing to pay €1,- on top of their ticket price for these factors. The survey was conducted between March 22 and April 14 2011 on 22 individual tours with a total of 1874 tourists, 907 of which filled out analyzable questionnaires. The survey was conducted on two whale watching catamarans: 'Freebird One' with a capacity of 196 passengers and 'One 4 You' with passenger numbers of up to 55. Both catamarans belong to the same whale watching operator, Freebird One.

The boats belong to the medium and large capacity boats and the survey is assumed to represent a majority of all boats in these categories. The small boats are assumed to be presented least by the survey as the types of tourists choosing very small boats, not booking via a tour operator and possibly booking a charter tour might differ significantly from those tourist asked in the survey.

The survey was conducted in three weeks which were not a holiday period in most countries. The researchers noticed that the whale watching tourists were often of middle age and traveling together as couples or families with young children. There were also some larger groups, younger couples and groups of younger tourists on board.

A questionnaire[4] was given to the tourists to fill out independently. This way, a large number of tourists could be included in the research which makes the results more representative for the

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[4]The questionnaire can be found in appendix A (English version)

tourists of the Freebird One. A total of 907 usable questionnaires were collected during 22 whale watching trips. No incentives were given to tourists that took part in the survey, it was strictly voluntarily.

The questionnaires were prepared in three languages: English, Spanish and German. These languages were chosen based on the countries of origin of Tenerife whale watchers which in 2008 consisted of 36% tourists from the United Kingdom, 29% from the Spanish mainland and 27% from Germany (Elejabeitia & Urquiola 2009). Some tourists from Poland, Russia and France could not be included in the research due to a language barrier. The questionnaire mainly consisted of closed questions to enable a better comparison of the answers for an easier quantitative analysis. Different answer formats such as Yes/No questions, scale questions and category questions were used.

During the whale watching tours, tour guides announced the survey and introduced the researchers through the microphone. After the tourists had seen whales and had the opportunity for a swim, the researchers asked all passengers personally to fill out a short questionnaire. All tourists on board were asked to participate in the research so the data collection can be assumed to be random.

Participation often was dependent on quality of the sightings, weather conditions (due to sea sickness) and number of people on board, with the percentage of tourists participating larger when less tourist were on board. Usually, participation was largest with tourists of the VIP tour, where only passenger numbers of up to 55 were allowed.

To gain the necessary knowledge to fulfill the research aim, here divided into three main parts, a questionnaire was developed that would give information on[5]:

1. **How environmentally conscious are whale watching tourists on Tenerife?**
   The type of tourist on board including: age, gender and nationality (1,2,3);
   The main motivations of tourists to go on board of a whale watching boat and their previous experience; (4,5)
   How important tourists find the conservation of the natural environment in general (8).
2. **What are the prices tourists are currently willing to pay for their ticket?**
   Where or how do the tourists purchase their tickets(6);
   How much do tourists pay for their tickets (6)
3. **Are whale watching tourists on Tenerife prepared to pay a higher price for a more environmentally responsible whale watching experience?**
   How important tourists find the conservation of the natural environment regarding whale watching(8);
   To what extent do tourists require the standards of the accreditation (18);
   Which aspects of the accreditation do the tourists find most important (8);
   For which of the factors involved in the accreditation are the tourists willing to pay €1,- on top of the ticket price (9).

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[5]The numbers behind each sentence refer to questions from the questionnaire that can be found in appendix A

Question 6 from the questionnaire answers two questions, while by finding out where the tourists purchased their ticket, we could find out the prices they paid as well by gathering information on prices from sellers on the street, in hotels and at the harbour.
Question 8 includes all factors mentioned and is therefore applicable to several questions.

3.6   Buena Proa's Strategy for 'Wa(h)l-Heimat'

During the research time spent on Tenerife (2-3-2011 – 10-5-2011) Buena Proa was in the middle of negotiating with 'Thomas Cook' and 'TUI' and the owner of the 'Freebird One' catamarans to find out about the possibilities for them to pay the amount asked per person as a whole, or partially. 'Freebird One' was going to be the first whale watching boat to accept the accreditation which was then supposed to take place on the first of May 2011.

In the meantime the communication with all of the other boats continued through presentations and private talks, and "getting a cup of coffee together" to keep everyone up to date and involved. There was no fixed 'Strategy' except for making sure that the different whale watching boats did not feel as if they were forced into something by an NGO or governmental organisation. Maria del Mar Cañado, the head of Buena Proa organized these meetings herself, sometimes supported by Alejandro Hidalgo Perez, an expert in the tourism branch.
Only weeks before the accreditation was supposed to take place the entire project got cancelled. The decisions on how to approach the financial side of the project were said to be the reason 'TUI-Germany' and 'Freebird One' decided not to go through with the accreditation(Del Mar Cañado May-2011).
The first attempt to implement the 'Wa(h)l-Heimat'-project was not successful. If negotiations start over again some new questions will arise. The survey result and the marketing plan attempts to show the industry how the accreditation can be a benefit for tourists, the environment, the boat operators and intermediaries, thereby convincing decision-makers in a possible new round of negotiations.

4. Statistical Results

This chapter will present the statistical analysis performed in SPSS supported by graphs, the tables of relevance can be found in the appendices, per paragraph the appendix number of relevant tables will be given. Only significant results will be presented (significance >95%). Table XXX gives an overview over which Chapter answers which research questions and the statistical tests used.

Table 2: Overview showing which chapter answers which research question

Chapter	Research Question	Statistical Test
4.1	Who are the tourists on board?	Frequency Tables
	Which are the main motivations for tourists on Tenerife for choosing the whale watching tour operators?	Frequency Tables
4.2	How many tourists have been whale watching before?	Frequency Tables
	Where or how do the tourists purchase their tickets?	Frequency Tables
	How much do tourists pay for their tickets?	N/A
4.3	To what extent do tourists find the standards of the accreditation and environmental conservation important and which aspects of the accreditation do the tourists find most important?	Frequency Tables
	Is there a relationship between different demographic and geographic groups of tourists (age, gender, nationality)and the importance of the various factors?	Crosstabs with Chi-Square Test
	Is there a relationship between the type of tour a tourist participates in (Eco tour, basic tour, VIP tour,...) and the importance of environmental conservation and the accreditation factors?	Crosstabs with Chi-Square Test
4.4	For which of the factors involved in the accreditation are the tourists willing to pay €1,- on top of the ticket price?	Frequency Tables
	Is there a relationship between different demographic and geographic groups of tourists (age, gender, nationality)and whether and the extent to which the tourist is willing to pay €1,- more for an accredited tour?	Crosstabs with Chi-Square Test
	Is there a difference between different demographic groups of tourists (age, gender, nationality)and the number of factors that tourists are willing to pay for?	Crosstabs with Chi-Square Test

	Is there a relationship between the type of tour a tourist participates in (Eco tour, basic tour, VIP tour, standard tour, Masca tour) and the willingness to pay for the accreditation factors?	Crosstabs with Chi-Square Test

4.1   Background Tourists

The Chapter will describe the types of tourists that took part in the interview, including age groups, gender and nationality. Furthermore will the main motivation factors of tourists and the tourists' previous whale watching experience be shown. All data concerning age, gender, nationalities, motivation factors and previous experience can be found in Appendix B.

4.1.1   Description of the Tourists

Research Question: 'Who are the tourists on board?'
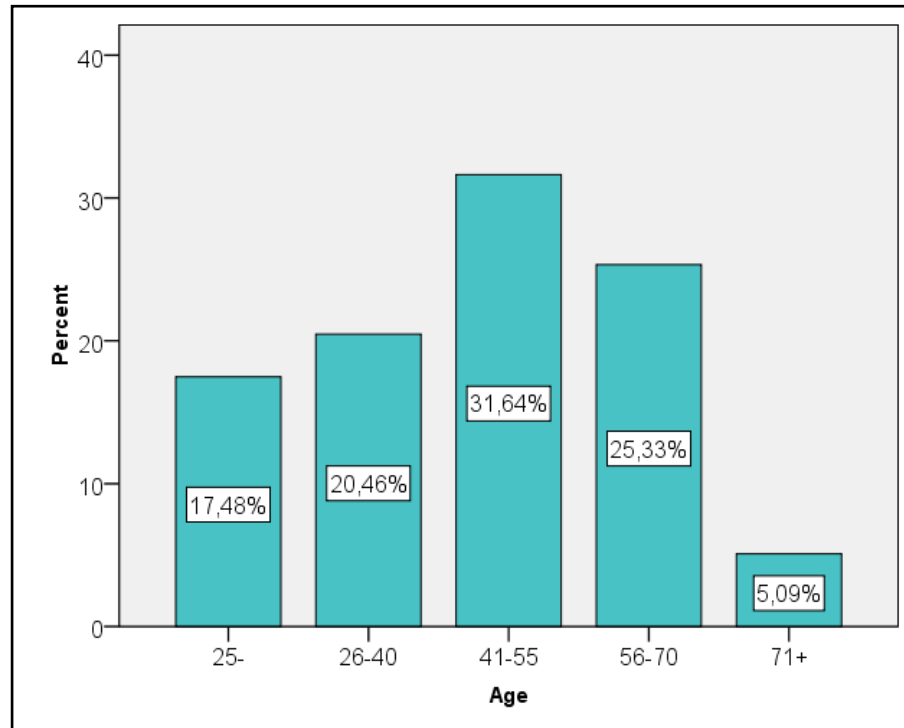
During March and April, the whale watching tourists that took part in the survey on the Freebird One and One For You consisted of 17% of people being 25 years old or younger. 20% of the tourists were between the age of 26 and 40 and 32% between the age of 41 and 55. 25% were between the age of 56 and 70 and 5% were 71 and older.

A total of 25 nationalities took part in the questionnaires,

Figure 2: Percentages of Tourists in the Different Age Groups

with the United Kingdom (54%), Germany (22%), the Netherlands (6%) and Belgium (5%) being the home countries of most participants in the research.

Out of the tourists that took part in the survey, 58.21% were female while the remaining 41.79% were male (see Figure XXX).
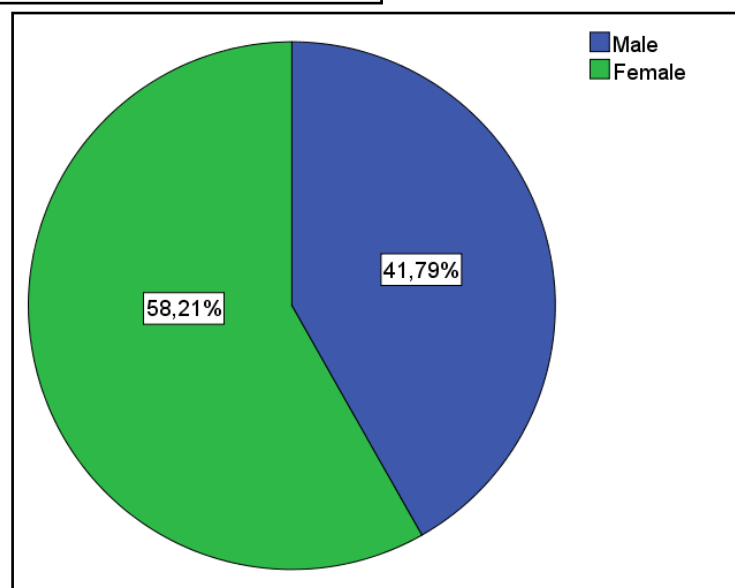
Figure 3: Gender Distribution of the Tourists

4.1.2 Motivation Factors

Research Question: 'Which are the main motivations factors for tourists to go on a whale watching tour?'

Figure 4: The Main Motivation Factors Named by the Freebird One Tourists
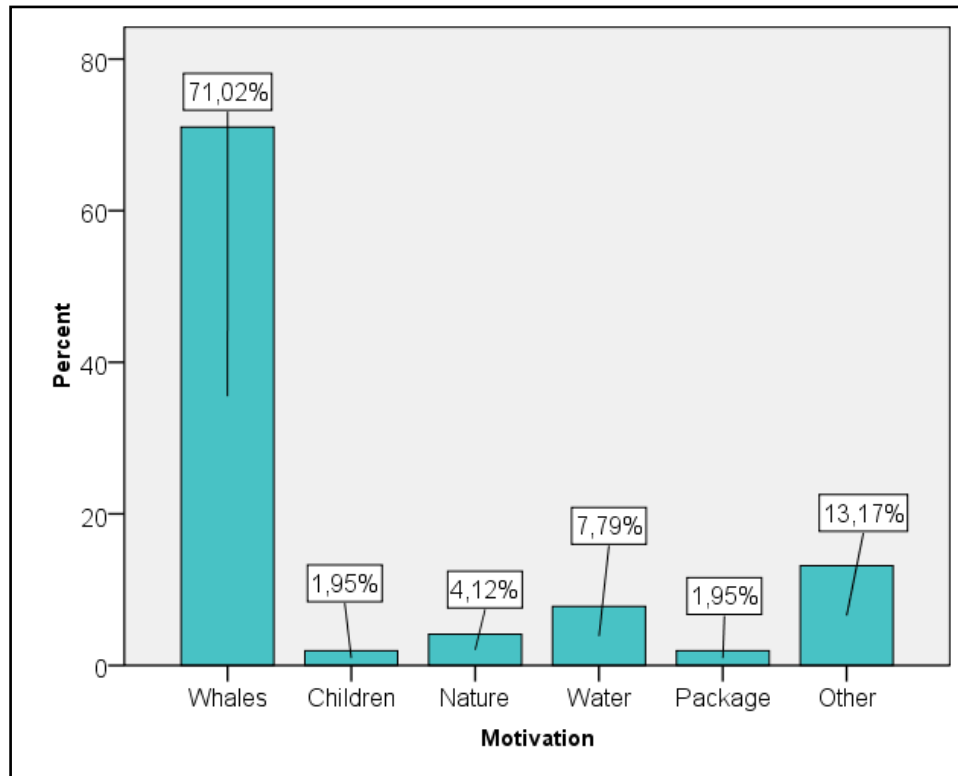
The largest proportion (71%) stated seeing whales and dolphins as their main motivation. Other factors mentioned include spending a day on the water on a boat (8%), enjoying nature (4%), the whale watching trip being part of a booked package (2%) and taking part in the whale watching as a family activity for the children (2%). Answers indicated as "Other" (13%) include e.g. having won the excursion, taking part as a favour to a friend or family member and not having anything else to do. A table with all data on motivation factors can be found in Appendix B.

4.1.3 Previous Experience

Research Question: 'How many tourists have been whale watching before?'
Most of the tourists took
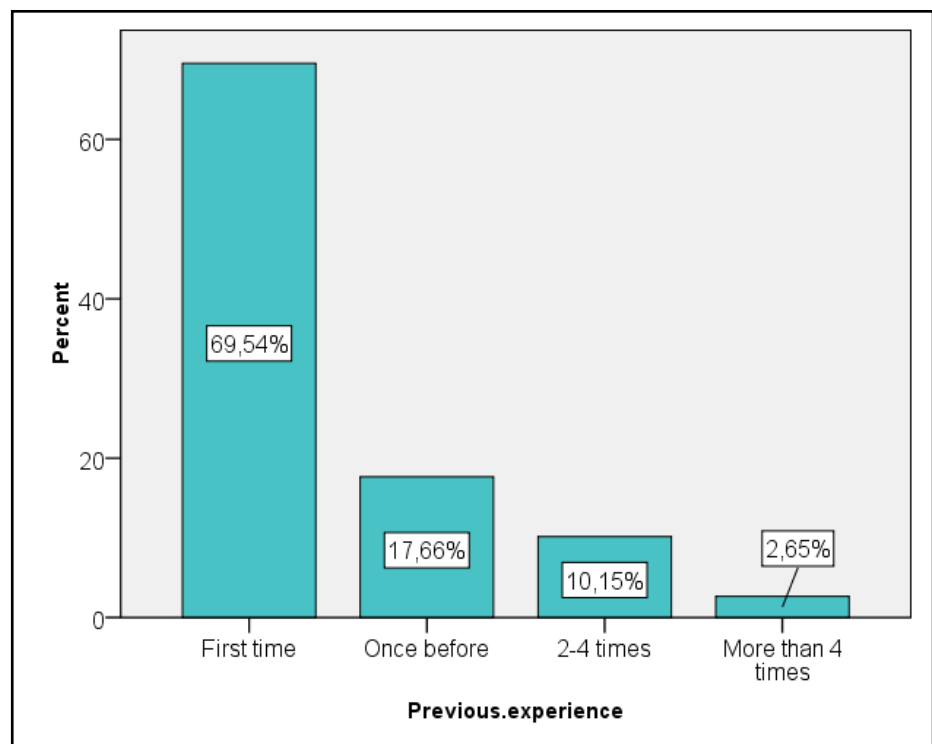
Figure 5: Tourists' Previous Whale Watching Experience

part in a whale watching tour for the first time (70%) while 18% had been whale watching once before. 10% had been on a whale watching excursion two to four times while 3% had previously been whale watching more than four times.

4.2   Ticket Price and Purchase

This Chapter will analyse where and how the whale watching tourists that took part in the survey purchased their tickets and what the different ticket prices are. All relevant statistical data concerning ticket purchase can be found in Appendix B.

4.2.1   Ticket Purchase

Research Question: 'Where or how do tourist buy their tickets?'
There are several ways of purchasing tickets for the Freebird One excursions (see Figure XXX).
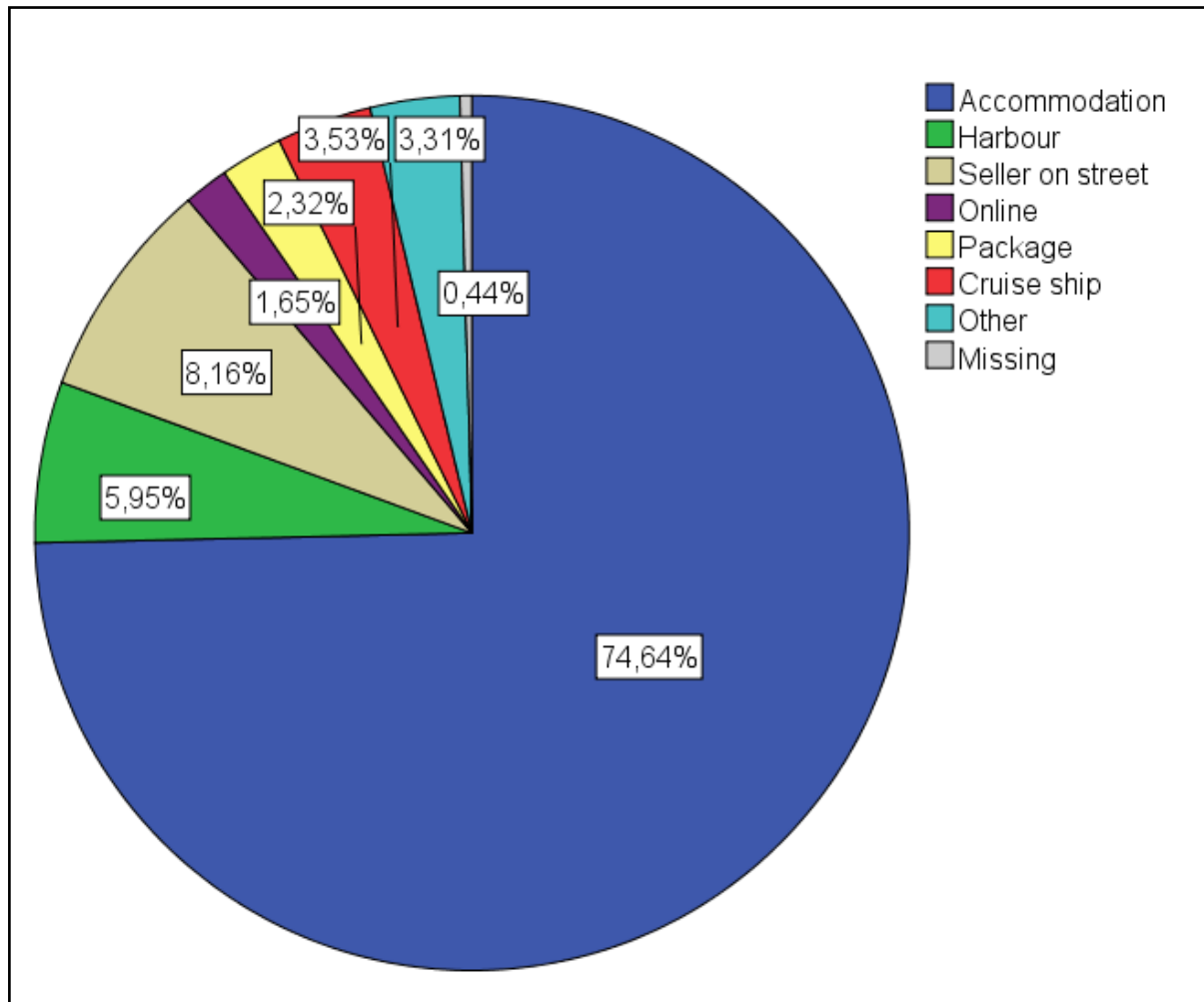
Figure 6: Ticket Purchase Methods Used by the Tourists
Three quarters of the tourists in March and April 2011 purchased their ticket at the accommodation from tour operators. Other distribution channels used include sellers on the street that sell different excursions (8%); at the harbour directly from the Freebird One office

(6%), on board a cruise ship that promotes the trip (4%); as part of a pre-booked package holiday (2%) or online (2%).

It was not possible to find a statistical connection between different groups (age groups, genders and nationalities) and the ticket purchase behaviour. All relationships found were not significant according to the Chi-Square Test or had too many cells with an expected count less than 5.

4.2.2   Ticket Price

Research Question: 'How much do tourists pay for their tickets?'
Ticket prices vary between the different types of tour as well as between the different intermediaries selling the tickets. Due to the sensitivity of this information, only indications of prices are given:

Standard 3-hour tours: €47
Basic 3-hour tours with a smaller lunch: €41
Standard 4.5-hour tour: €54
Thomson VIP tours: €112

4.3   The Importance of the Accreditation Factors to the Tourists

This chapter will analyse how important the tourists find the various accreditation factors as well as environmental conservation. Furthermore will relationships between different demographic groups (age, gender), geographic groups (nationalities) and tourists of different types of tours (Standard, Eco, VIP, Basic, Masca) and the importance of the factors be analysed. Please refer to Appendix C for all relevant tables concerning importance of the various factors.

The Importance of Conservation of the Natural Environment and the Accreditation Factors

Research Question: 'To what extent do tourists find the standards of the accreditation and environmental conservation important and which aspects of the accreditation do the tourists find most important?
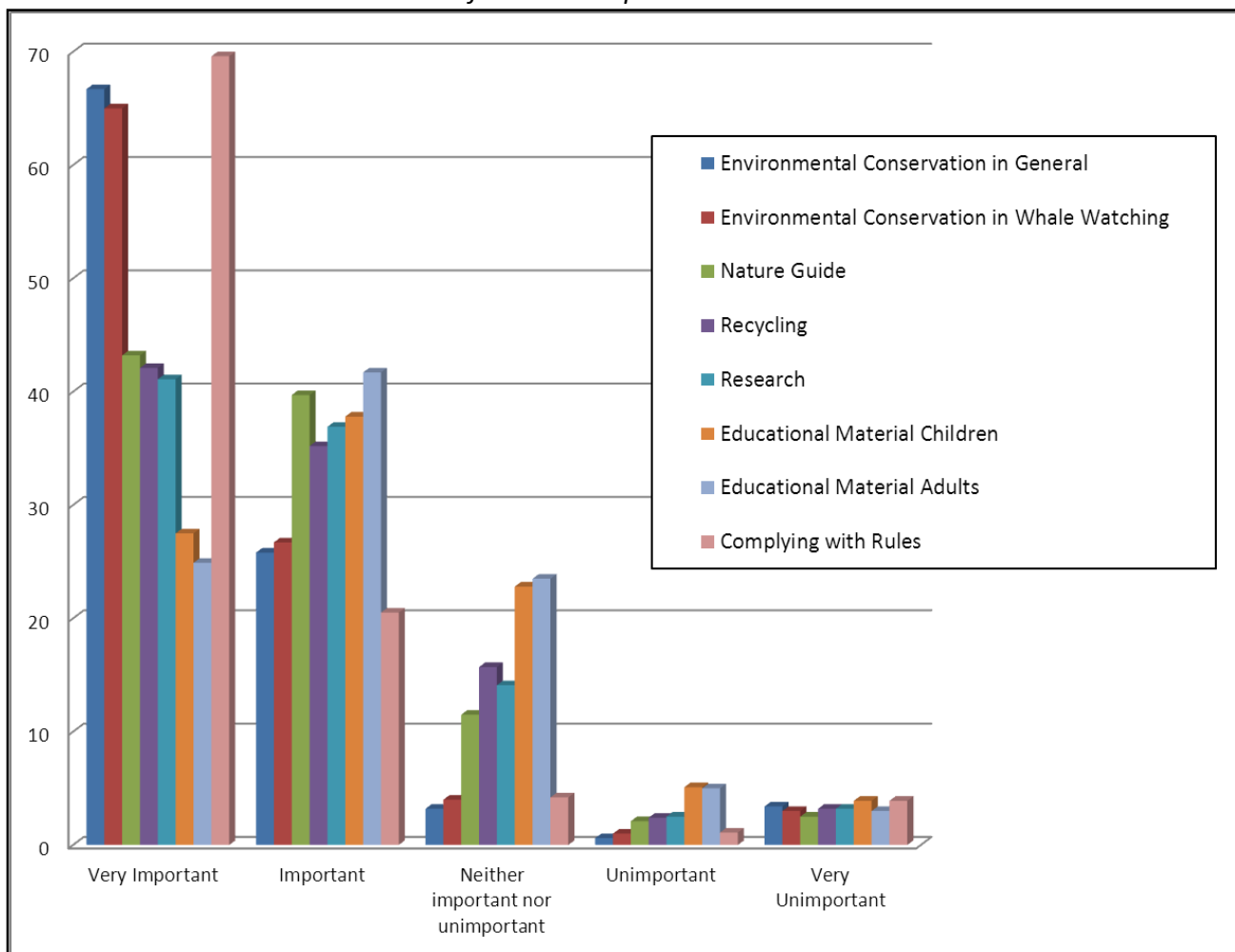
Figure 7: The Tourists' Perceived Importance of the Accreditation Factors and Environmental Conservation

Figure XXX shows per factor what percentage of people found the particular factor "very important", "important", "neither important nor unimportant", "unimportant" and "very unimportant".

Over 60% of the people found environmental conservation in general, environmental conservation in whale watching and complying with the rules for approaching whales and dolphins very important. A further 20-25% stated these factors to be important.
Over 40% of the people found the presence of a nature guide, a recycle system and research on whales and dolphins on board very important. Another 30% found these factors important
Over 70% of the people found the educational material for children and for adults either very important or important.
Less than 9% of the people thought of any of the factors as being either unimportant or very unimportant.

Relationship: Demographics-Geographics and Accreditation Factors
Research Question: 'Is there a relationship between different demographic and geographic groups of tourists (age, gender, nationality) and the importance of environmental conservation and the accreditation factors?'
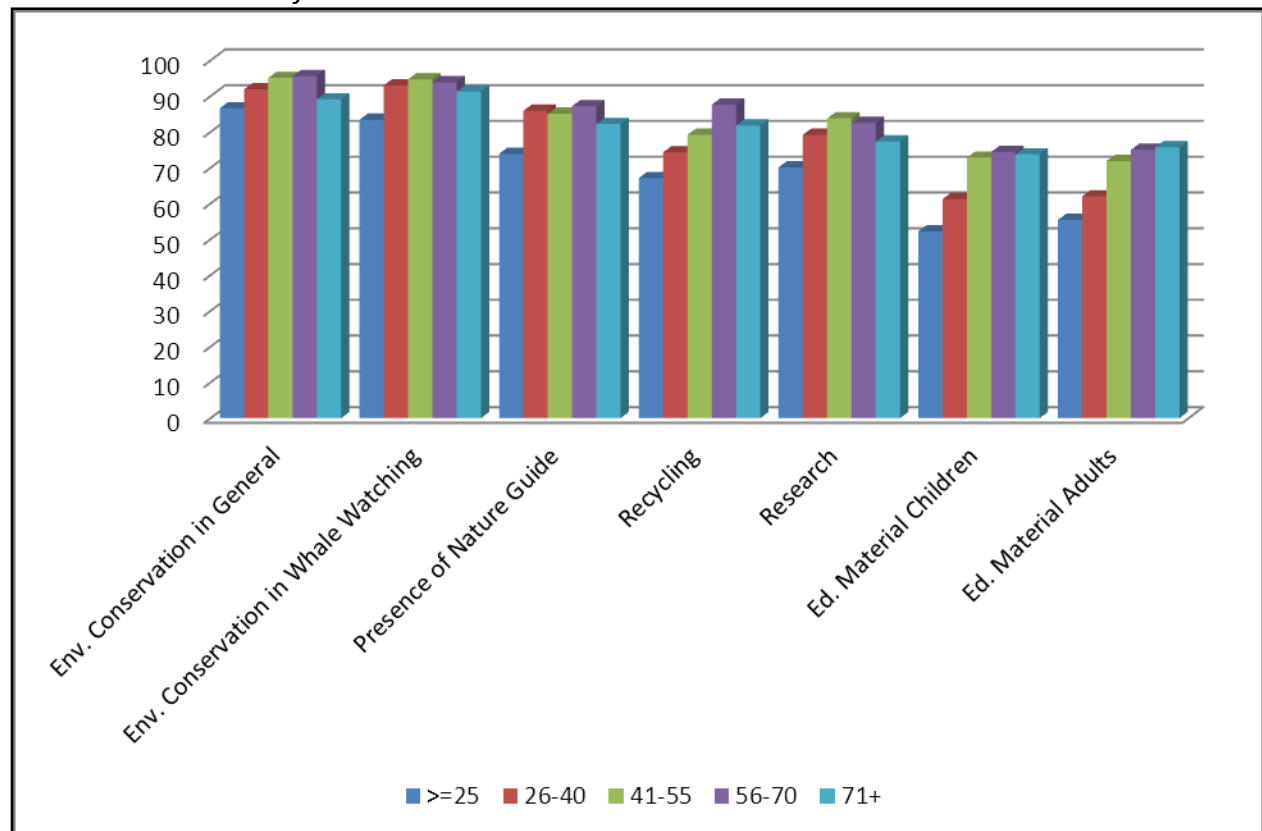
Figure 8: Percentages Responding 'Important' or 'Very Important' per Age Group

Figure XXX shows what percentage of each age group finds the various accreditation factors important and very important. Educational Material for both children adults is seen as important by around 70% of the age groups 41-55, 56-70 and 70+ while only 60% of the 26-40-year olds and 50 % of the people of age 25 and under find educational material for adults important. The Chi-Square Test showed that these connections are significant and not coincidential.
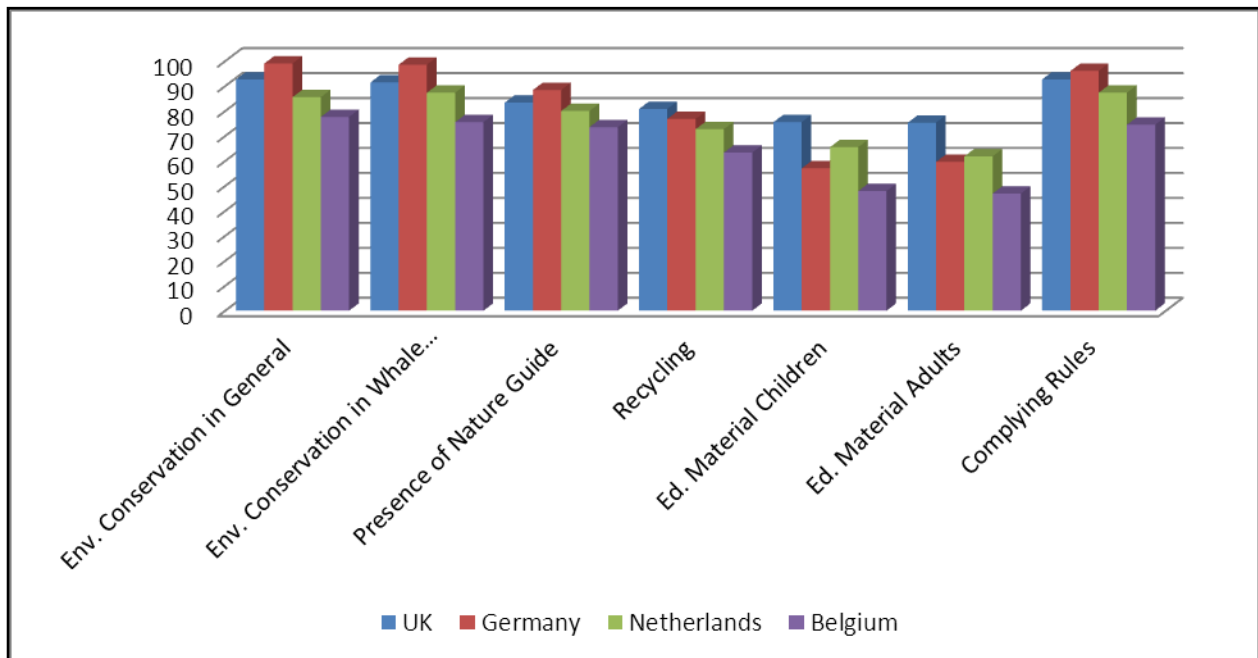
Figure 9: Percentages responding 'Important' or 'Very Important' per Age Group

Figure XXX shows what percentage of each nationality finds the various accreditation factors important and very important. Tourists from Germany find environmental conservation, the presence of a nature guide and the boats complying with the rules more important than tourists from other countries. Recycling and educational material are found most important by tourists from the United Kingdom. Generally speaking, tourists from the Netherlands and Belgium find the accreditation factors and environmental conservation less important than tourists from Germany and the United Kingdom.

Relationship: Type of Tour-Importance

Research Question: 'Is there a relationship between the types of tour the tourist participates in and the importance of environmental conservation and the accreditation factors?'

Figure XXX shows the percentage of tourists finding the factors important or very important, per type of tour. Only those factors are mentioned where there was a significant relationship between importance and type of tour.
The tourists of all types of tours indicated that 'Complying with the Rules' was most important, with around 90% of the tourists of all tours finding this factor important or very important.
The presence of a nature guide also was found important by the participants of all types of tours with percentages of tourists finding this factor important ranging between just under 80% (Basic tour participants)and just over 90% (Eco tour participants).
Recycling on board the whale watching vessel was indicated to be important to between around 75% (Eco tour participants) and 90% (VIP tour participants) of the tourists.

The presence of educational material, both for children and adults, was generally found least important. Around 50% of the participants of the Eco tour found educational material important or very important. Of those tourists having had booked the Masca tour, around 60% found educational material important. Around 70% of the participants of the Standard tour, the VIP tour and the Basic tour found educational material for children and adults important.
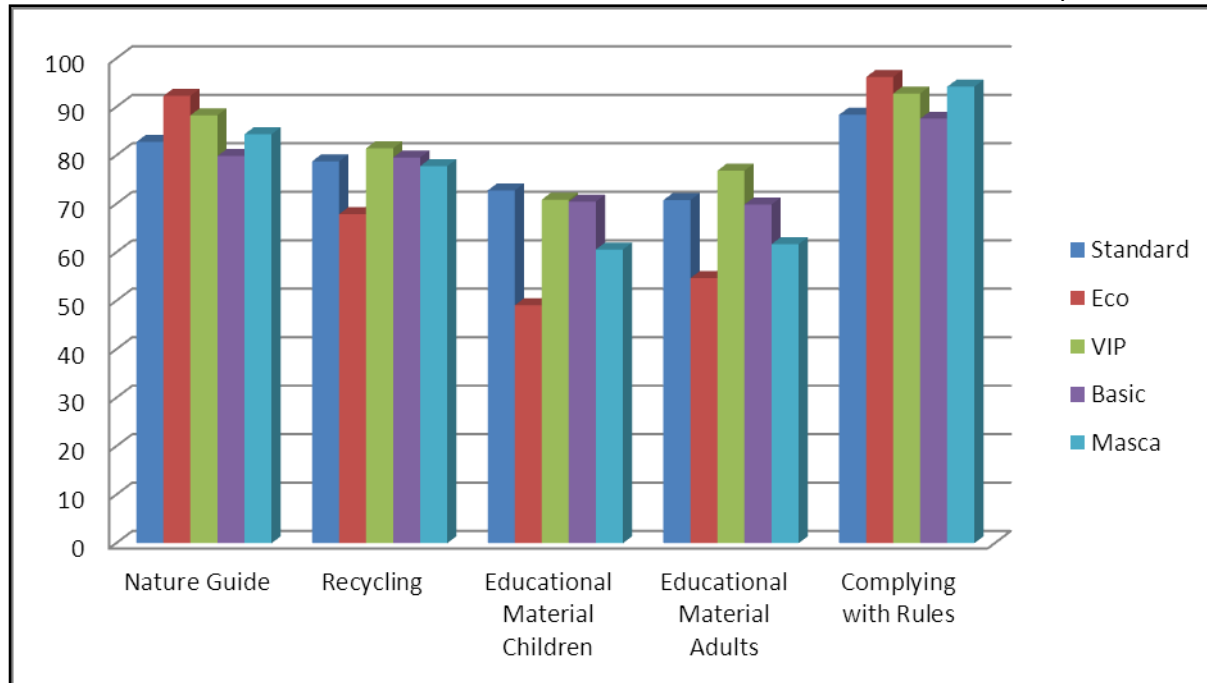
 Figure 10: Percentages responding 'Important' or 'Very Important' per Type of Tour

Generally speaking, there are some differences in importance of the educational material, which is found less important by the participants of the Eco tour and the Masca tour while the importance of the other factors has only minor differences for the tourists taking part in the different types of tours. The Chi-Square Test showed that these connections are significant and not coincidential.

4.4   The Tourists' Willingness to Pay for Various Factors

In this chapter, the tourists' willingness to pay for the accreditation will be determined. Willingness to pay will be visualised per factor, as well as the total number of factors tourists find worth willing to pay for. Differences in willingness to pay between the different groups of tourists (age, gender, nationality, type of tour taken part in) will be shown.
Please refer to Appendix D for all statistical data concerning willingness to pay .

4.4.1 General Willingness to Pay for the Accreditation Factors

Research Question: 'For which of the factors involved in the accreditation are the tourists willing to pay €1,- on top of the ticket price?'
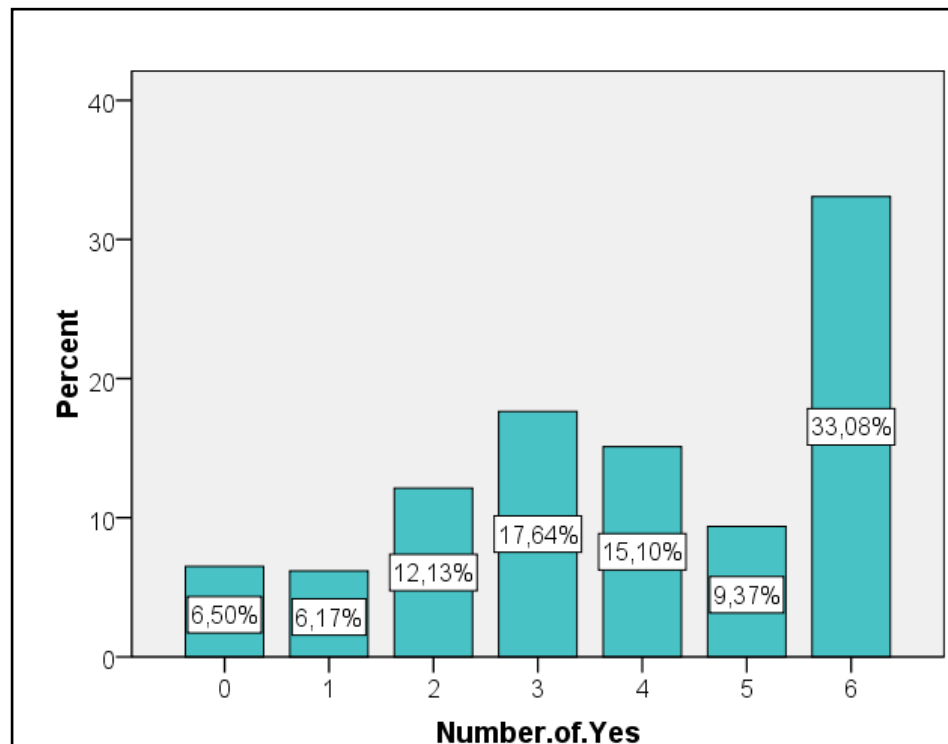
Figure 11: Number of Factors Tourists are Willing to Pay for

Figure XXX shows per factor the percentage of tourists that would be willing to pay one Euro extra on top of the ticket price. Tourists were asked to indicate for each factor whether they were willing to pay the Euro, with the costs not adding up if more than one factor was found to be worth paying the Euro.
There were 59 (6,5%) tourists that did not want to pay a Euro extra for any of these factors. 801 (93,5%) tourists said to be willing to pay one Euro extra for at least one of the factors.

The willingness to pay varied between the different factors (see Figure XXX). More than 70% of the tourists indicated being willing to pay for a nature guide and research for the conservation of cetaceans on board the vessel as well as the whale watching boat complying with the rules for approaching cetaceans. Half the tourists indicated they were willing to pay for recycling and educational material both for children and adults on board the whale watching vessel.
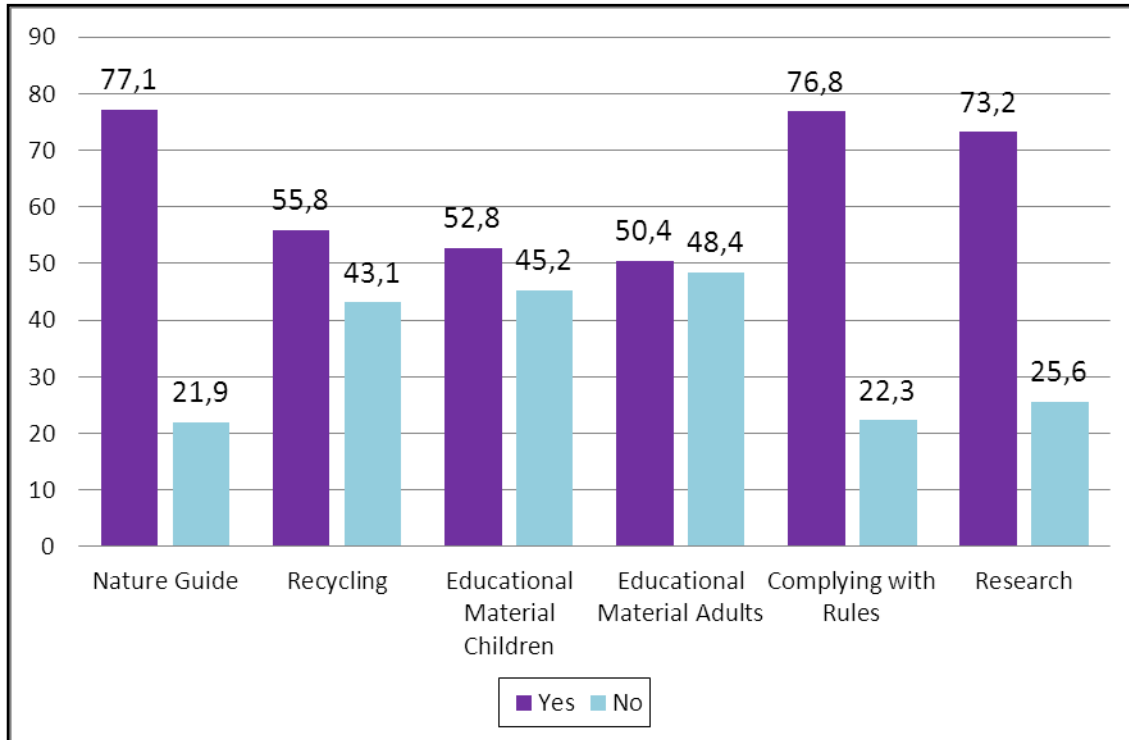
Figure 12: Willingness to Pay per Accreditation Factor

Relationship: Demographics-Geographics – Willingness to Pay

Research Question: 'Is there a relationship between different demographic and geographic groups of tourists (age, gender, nationality) whether and the extent to which the tourist is willing to pay €1,- more for an accredited tour?'

Nationality
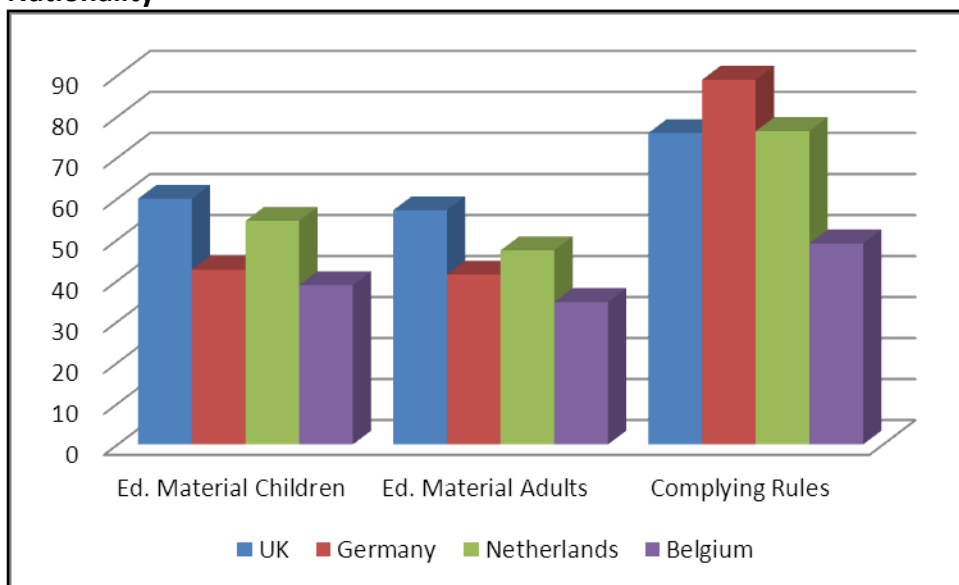
Figure 13: Willingness to Pay for Accreditation Factors per Nationality

There were only slight statistically significant differences between the nationalities and the factors 'Education Material for Children', 'Educational Material for Adults' and 'Complying with the Rules'. German tourists were more likely to be willing to pay for the boats complying with the rules while tourists from the United Kingdom were most likely

37

to be willing to pay for educational material. All four nationalities found the boats complying with the rules more important than educational material for children or adults. The Chi-Square Test showed that these connections are significant and not coincidential.
No significant connections between nationality and other accreditation factors were found.

Age Groups
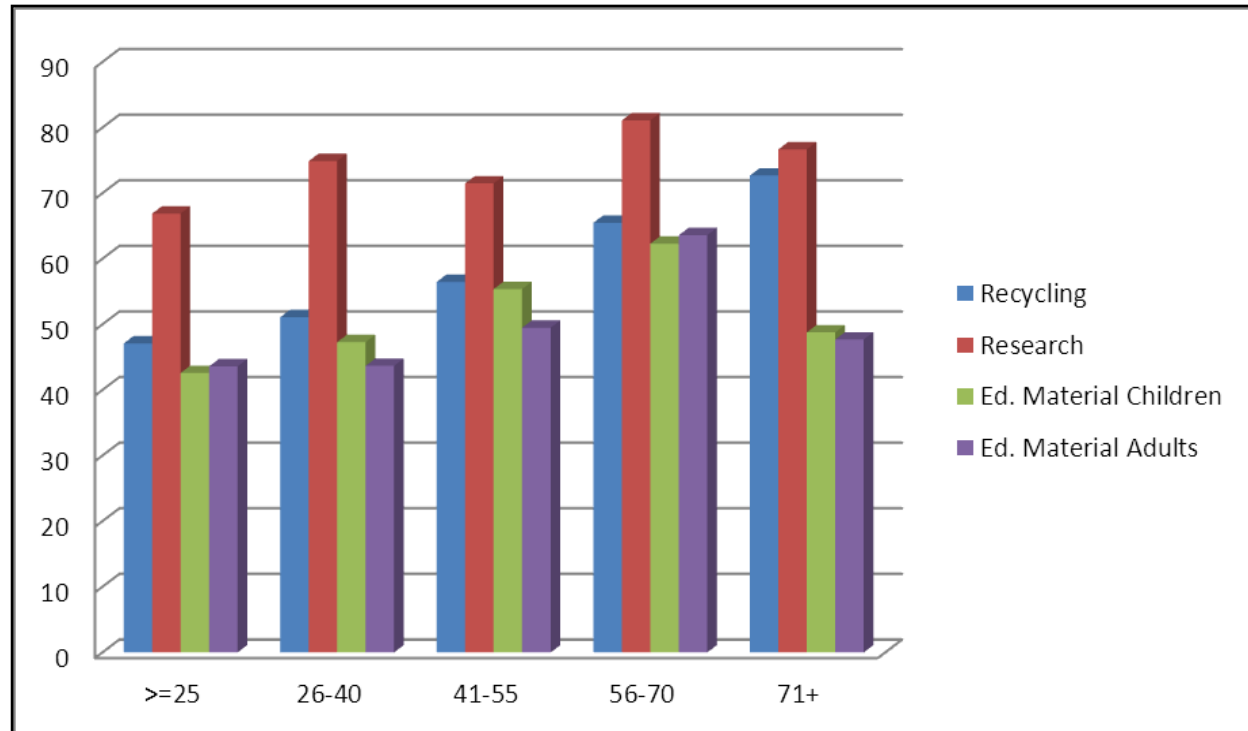
Figure 14: Willingness to Pay for Accreditation Factors per Age Group

Figure XXX shows the percentages of tourists willing to pay for the accreditation factors per age group. All age groups are most willing to pay for 'Research for the Conservation of Whales and Dolphins', with percentages between around 65 % (age group 25 and under) and around 80% (age group 56-70).
Educational Materials both for children and adults are the factors the least people of all age groups are willing to pay for. For this factor, the percent of tourists willing to pay ranges from just over 40% in the age group 25 and under and just over 60% of 56- to 70-year-olds.
The willingness to pay for recycling is increasing from lower to upper age groups with around 45% of tourists 25 and under and over 70% of 71-year-olds and over willing to pay for it.

Relationship: Demographics – Number of Factors Willing to Pay for
Research Question: 'Is there a difference between different demographic groups of tourists (age, gender, nationality)and the number of factors that tourists are willing to pay for?'

The statistical significant differences in the number of factors people were willing to pay one €1,- extra for are described per demographic group: gender, nationality and age supported by relevant graphs.

Nationality

Figure XXX gives an overview of the number of factors tourists are willing to pay for in percent per nationality. Only the four most occurring nationalities, The United Kingdom, Germany, The Netherlands and Belgium, were chosen in order to find statistically
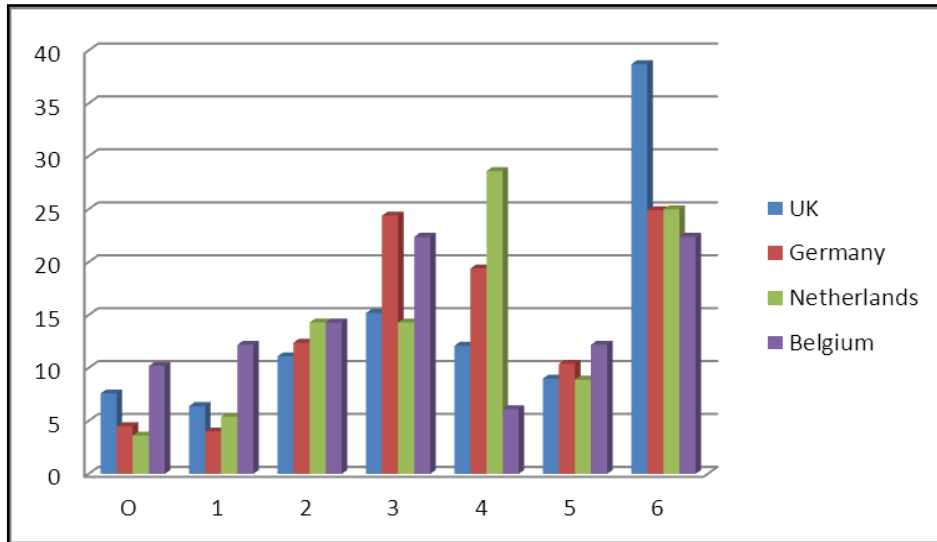
Figure 15: Number of Factors Tourists are Willing to Pay for per Nationality

significant connections.

Tourists from the United kingdom were most likely to pay for all six accreditation factors while Belgian tourists were most likely to not be willing to pay for any of the factors.
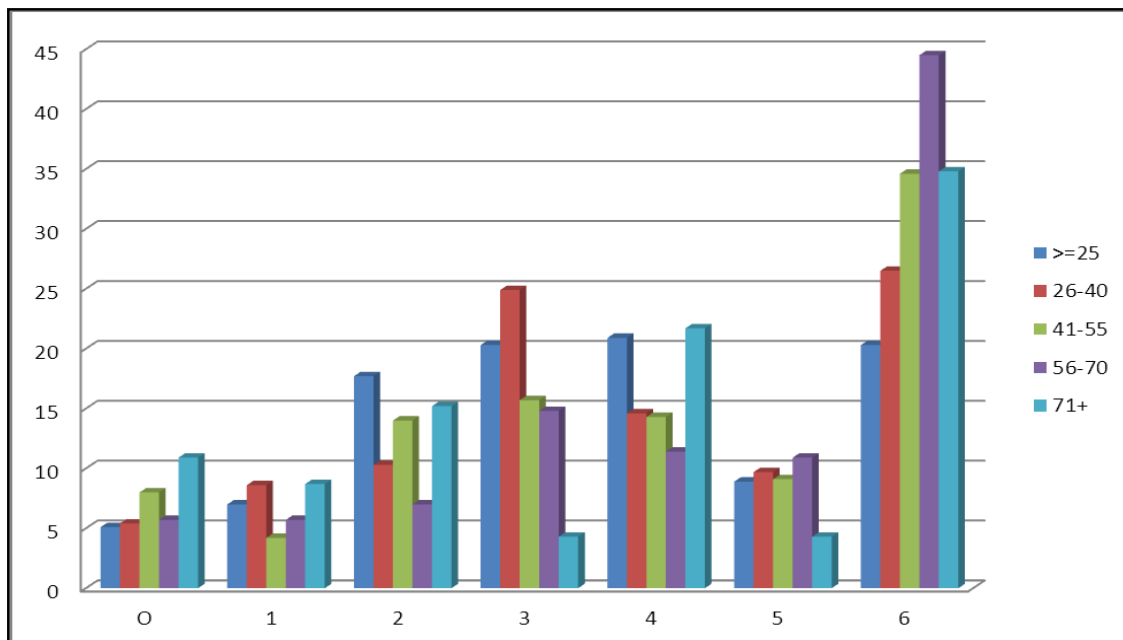
Age Groups

Figure 16: Number of Factors Tourists are Willing to Pay for per Age Group

Figure XXX gives an overview of the number of factors tourists are willing to pay for in percent per age group.

Not willing to pay for any of the factors are around ten percent in the 71+ age group and around seven percent in the group of 41- to 55-year-olds. Only five percent of the tourists in the age groups under 25, 26-40 and 56-70 are not willing to pay for any of the accreditation factors.

The largest percentage of people willing to pay for all factors can be found between the 56- and 70-year-olds (around 44%), followed by the age groups 41-55 and 71+ with around 34% of people willing to pay and around 26% of the 26- to 40-year-olds willing to pay for all six factors. The group least willing to pay for all factors are the tourists 25 years old and under. The Chi-Square Test showed that these connections are significant and not coincidential.

Relationship: Different tours – Willingness to Pay
Research Question: 'Is there a relationship between the tourists' willingness to pay and the type of tour the tourist took part in?'

Figure XXX shows what percentage of the tourists of different types of tours are willing to pay for the accreditation factors. There was no significant connection between type of tour a tourist participated in and the presence of a nature guide and recycling on board the whale watching
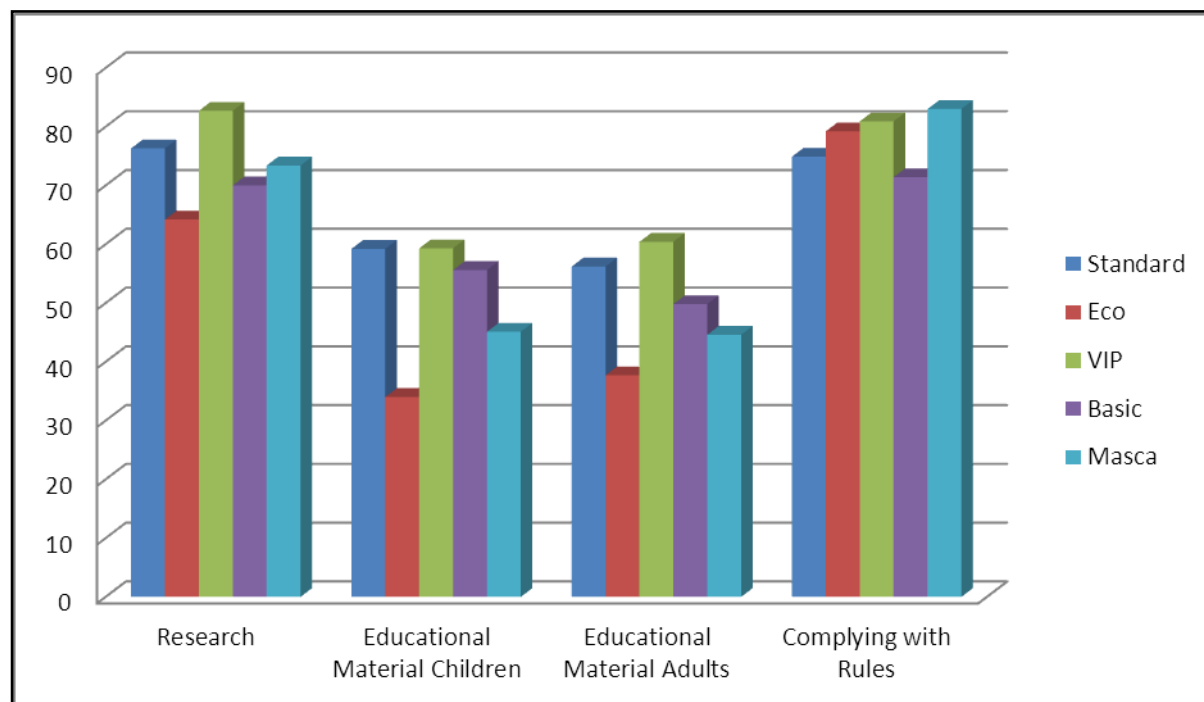
 Figure 17: Number of Factors Tourists are Willing to Pay for per Type of Tour
vessel.

For research, over 80% of the participants of the VIP tour are willing to pay, while just over 60% of the tourists of the eco tour and around 70% of tourists of other tours indicated they were willing to pay.

The willingness to pay for educational material is strongest within the tourists of the standard tour and the VIP tour, with around 55% willing to pay. Of the basic tour tourists, around 50% are willing to pay while only just over 40% of the Masca tour tourists indicated their willingness to pay for educational material for children and adults. The group least willing to pay for educational material is the group consisting of Eco tour participants. Just over 30% of this group is willing to pay for educational material for children while around 35% is willing to pay for educational material for adults.

Between 70 and just over 80% of the tourists of all tours are willing to pay for the boats complying with the rules.

In general, the participants of most types of tours are more likely to be willing to pay for research and complying with the rules than educational material.

5. Discussion

5.1 Representation

Due to limited time available for the collection of primary data as well as limited willingness of whale watching boats to have the survey being conducted on board it was decided to limit the research on one operator with two boats. The survey results should be seen as indicating the tourists' attitudes on the majority of the medium- and large-size whale watching boats of Tenerife, being most representative for the tourists of the Freebird One and One For You. The different whale watching trips offered are relatively homogenous and therefore probably attract the same types of tourists. However, to be certain about the validity of the results for other whale watching tours on Tenerife, further research into the attitudes of tourists on other boats is needed.

The survey was conducted during three weeks which were not a main holiday period in any of the generating countries for Tenerife whale watching. Demographic and geographic composition of the tourists might have been slightly different in a different period such as a stronger representation of families with children in school age during the Easter holidays.

5.2 General data validity

One factor that might have affected the validity is that the questionnaire was used in three different languages. Although great care was taken to translate the questions into exactly the same meaning, slight differences might have occurred due to the translations.

Another language issues might have been the limited number of languages the survey was prepared in. Some tourists filled in a questionnaire that was not written in their native language. This might have led to misunderstanding some questions and therefore faulty answers.

The questionnaire featured a set of questions (Question 7: "Have you noticed or been informed about any of the following on board the whale watching vessel?") that were not used in the results. When preparing the questionnaire it was assumed that the survey could be conducted on non-accredited as well as accredited whale watching tours. The set of questions was supposed to show whether the tourists notice the accreditation factors on board. As the accreditation has not been implemented on any of the boats so far, the outcomes of question 7 were not relevant for the research due to no comparison being possible.

5.3 Data sampling

The survey was conducted during 22 individual whale watching tours with a total of 1874 tourists, 907 of which filled out analysable questionnaires.

It is possible that some questions were answered slightly more positive due to the tourists answering in a socially acceptable way or wanting to do a favour to the researchers. A survey method with no contact between researchers and tourists might have given a slightly different

image. However, due to the survey being confidential, it is assumed that this influence is only minor.

The weather also influenced the number of questionnaires gained from each tour. On most of the tours, some of the tourists were seasick. Those tourists not feeling well were not asked to participate in the research. As seasickness can affect all demographic groups and nationalities, this is assumed to not have affected the results of the survey. On one occasion, the researchers felt it was best to not ask any tourists to fill out the questionnaire as a vast majority was feeling sick or assisting those who were sick. It is assumed that not including tourists that were feeling seasick does not have an effect on the validity of the data as the survey was about tourists' attitudes, not their experience on the whale watching boat.

5.4 Who are the tourist on board?

It is possible that due to a language barrier, the frequencies of the different nationalities on board the Freebird One is slightly different in reality than in the data. As the questionnaires were only prepared in three languages, some nationalities that do not speak any of these languages might be underrepresented in the survey. The researchers feel that this might be the case with people from Russia, Poland and France, some of whom did not want to participate in the research as they felt they were not able to understand the questions well enough. There were three cases with a missing value for age. It is assumed that these people felt not comfortable stating their age. As there were only three missing value cases out of 907 total cases, the influence this has on the validity of the results is minor.

Of those tourists that participated in the research, 58% were female while the remaining 42% were male. It seems to be common for whale watching activities that women are represented more strongly than men, examples of female majorities n whale watching include surveys from Queensland, Australia, British Columbia, Canada, California, Japan, Belize and New Zealand (Patterson, 2010).

The largest age group in the survey consisted of the 41- to 55-year-olds. This is also similar to the results of other whale watching surveys where most participants were middle-aged, such as surveys from Queensland, Australia, British Columbia, the Dominican Republic, Scotland and Belize (Patterson, 2010).

Concerning age and gender, the participants of the survey were therefore similar to the participants of other whale watching destinations worldwide.

5.5 Tourists' Motivation Factors

This question was (apart from nationality) the only open question used in the questionnaire. It was decided to use an open question to not influence the results. Therefore, answers sometimes had to be interpreted to fit them into the categories. Especially striking was the fact that only around 70% of the tourists participated in the tour to see whales and dolphins while eight percent wanted to spend a nice day at sea and 13% had other motivations such as having won the ticket or doing a favour to a family member or a friend.

5.6 Ticket Purchase

The survey showed that most tourists on the Freebird One (75%) booked their ticket via a tour operator. This would be very different if the survey was conducted on some of the other boats of Tenerife, as only around half of the whale watching boats of Tenerife work with tour operators. Especially small boats usually do not have any contract with the tour operators due to the large commissions that have to be paid to tour operators as well as small capacities on the boats which are not useful for large tour operators. The fact that so many tourists of the Freebird One book their tickets through their tour operator also shows that Tenerife is a mass tourism destination with many tourists booking a package holiday. On an international scale, this is probably very different too. Most tourists that visit Tenerife can be described as psychocentrics who "seek familiar surroundings, belong to the lower income groups, are unadventurous and demand a high level of tourism plant" (Cooper, 2005). It would be interesting to know whether there is a difference between the general Tenerife tourist and the Tenerife tourist taking part in whale watching in these factors and the extent to which tourists can be categorised as being psychocentric.

5.7 Importance of Accreditation Factors for Tourists

The results show that educational material on board the whale watching vessel is found very important by 25% and important by around 40% of the tourists. The presence of a nature guide is found very important and important by 40% each. These results can be compared to a survey conducted in a whale watching field station in Belize where 160 tourists were asked: "How important is it to you that your trip has an educational character?" 55% of the tourists replied 'very important', 40 % replied 'important' while 5 % replied 'unimportant' or 'very unimportant' (Patterson, 2010). The tourists in Belize found educational material clearly more important than the tourists in Tenerife. This might have to do with the types of tourists coming to Tenerife seeing whale watching less as an educational activity than the tourists that were taking part in the survey in the field station in Belize.

The results also show that the boats complying with the rules for whale watching is found very important by the largest percentage of all accreditation factors by around 70% and important by another 20% of the tourists. These results are also comparable to the Belize survey which asked a question of a similar nature. The group of tourists in Belize was asked "How important do you think marine mammal conservation laws and policies are? " to which 83% replied very important and 17% replied 'important', with no tourist finding marine mammal conservation laws unimportant or very unimportant.(Patterson, 2010)

5.8 Willingness to Pay

The results show that the vast majority (93,5%) of the tourists that took part in the survey were willing to pay for at least one of the factors of the accreditation. This result is very similar to the result of a survey undertaken in a whale watching field station in Belize. The tourists were asked the question "Would you be willing to pay higher prices in order to protect the environment?" concerning a whale watching trip. 93% of the tourists indicated they were willing to pay.(Patterson, 2010).

It is remarkably that recycling and research on board the whale watching vessel are found important or very important by a similar number of people, while the willingness to pay is significantly higher for research (over 70% willing to pay) than it is for recycling (around 55% willing to pay). This might be due to the fact that tourists take recycling more for granted or that they do not see the costs involved with recycling/implementing a recycling system.

5.9 Relationships Between Importance of Accreditation and Demographics

For most of the accreditation factors, the importance increases with age group, slightly decreasing again for the 71+ group for most factors. However, recycling is found most important by the oldest age group. This might be due to the older generations having grown up in a society where things would not have been just thrown away but reused or made into something new. This might have influenced the older generations strongly, nowadays still finding recycling very important. The younger age group, however, has grown up in a society where it is normal to throw away things after having finished using them.

The fact that the youngest age group generally found the accreditation factors less important might partly be explained by the motivations for taking part in the tour. Younger people might have taken part in the tour with their family, feeling like they were "dragged" onto the tour without actually being interested in it. Group pressure from friends might have had a similar effect in the younger age group. As these are only speculations, further research would have to be conducted into the motivation and importance of the accreditation factors of younger people. Due to the limited number of young people in this survey, this could not be analysed with the data available.

5.10 Relationships Between Willingness to Pay and Demographics

Generally, the three middle age groups were more willing to pay than the younger and older age groups. This might be due to firstly less interest in the accreditation factors which was especially shown by the younger age group, and secondly by less money being available to the lower and older age group and therefore more sensitivity to price changes.

5.11 Relationships Between Importance of Accreditation or Willingness to Pay and Different Tours

The results showed minor differences between participants of different tours. These differences are possibly also influenced by the nationalities and ages of tourists on the tours as some types of tours are only offered to certain types of tourists.

The eco tour is offered only to tourists of TUI Germany while the VIP tour is offered only to Thomson UK tourists and does not allow children. Differences between the types of tours will therefore strongly be influenced by these factors.

5.12   The Connection Between Importance and Willingness to Pay

A comparison between the importance of the factors and willingness to pay has indicated some irregularities which might be due to a false interpretation of the question. This relationship can be found in tables in Appendix E.

A total of 24 people have indicated that they find the presence of a nature guide on board the whale watching vessel "unimportant" or "very unimportant" but are willing to pay an extra Euro for this. This might indicate that those people understood the question asking about the importance in a different way with the number 1 indicating "very unimportant" and 5 indicating "very important". Similar results have been found for recycling, which 23 people indicated being "unimportant" or "very unimportant" to them but willing to pay. For the research for the conservation of cetaceans, 29 of these cases can be found and educational material for adults and for children both have 24 cases that might have been filled out assuming the number 1 indicates "very unimportant" and 5 indicates "very important". 27 tourists indicated finding the boats complying with the rules "unimportant" or "very unimportant" while still be willing to pay for these factors.

Due to these insecurities, two manipulated data sets have been developed, one deleting the possibly wrong cases and one interpreting them in such a way that a previous "very unimportant" would be changed to a "very unimportant", assuming the tourists mixed up the numbers. For these datasets, a total of 36 cases have been changed or deleted. Frequency tables for the importance of the accreditation factors of these manipulated data sets can be found in Appendix F. The manipulation leads to an increase of around two to three percent of tourists finding the factors important or very important and a decrease of two to three percent of tourists finding the factors unimportant or very unimportant. The difference between the two manipulated data sets is marginal.

5.13 Questions not Used in the Results

The questionnaire featured a set of questions (Question 7: "Have you noticed or been informed about any of the following on board the whale watching vessel?") that were not used in the results. When preparing the questionnaire it was assumed that the survey could be conducted on non-accredited as well as accredited whale watching tours. The set of questions was supposed to show whether the tourists notice the accreditation factors on board. As the accreditation has not been implemented on any of the boats so far, the outcomes of question 7 were not relevant for the research due to no comparison being possible.

6   Conclusion and Recommendations

6.1 Conclusions of the Survey

The survey gave an insight into the attitudes of 907 people from 20 nationalities, with most tourists coming from the United Kingdom, Germany, The Netherlands and Belgium. Females were slightly stronger represented than males and most participants belonged to the middle aged groups.

Generally, the tourists of the Freebird One found environmental conservation and the accreditation factors very important or important with only minor differences between age groups and nationalities and no statistically significant differences between male and female survey participants. Minor differences between tourists of the different types of tours were also found but might be influenced by the geographic and demographic characteristics of the tourists being offered the tour rather than the types of tours.

The vast majority of tourists (93.5%) found at least one of the accreditation factors worth paying for while 33% of the tourists found all six accreditation factors worth paying for. The factors most tourists were willing to pay for were the presence of a nature guide (77.1%), the boats complying with the rules for approaching cetaceans (76.8%) and research for the conservation of cetaceans (73.2%), with less people being willing to pay for recycling (55.8%), and educational material for children (52.8%) and adults (50.4%). The upper and lower age classes were slightly less willing to pay compared to the middle age classes, possibly due to less interest as well as being more price sensitive.

6.2 Recommendations for Whale Watching Boats

The survey has clearly shown that the vast majority of tourists of the Freebird One are willing to pay for the factors of the accreditation.

It is therefore recommended to the whale watching boats of Tenerife to take part in the accreditation to improve the quality of the tours both for the environment and the tourists.

The accreditation can be used as a competitive advantage for the for boats implementing it. Generally, the factors of the accreditation are demanded by the tourists. Therefore, implementing the accreditation would improve the quality of the whale watching tour for the tourists. The price would increase by a Euro per passenger which is given to Buena Proa to cover the costs for the accreditation. Especially those factors most important to the tourists, namely the presence of a nature guide, research for the conservation of cetaceans and the boats complying with the rules, should be communicated to both consumers and intermediaries. As all groups of tourists that took part in the survey were generally willing to pay and found the factors mentioned above most important, the promotion can be targeted to a wide group of tourists, the accreditation does not have to be seen as a niche market product only interesting for a small fragment of Tenerife's whale watching tourists. Even though the

marketing plan was written for Freebird One, it can be adapted to most other organisations that take part in the accreditation.

6.3 Recommendations for Further Research

It is recommended that for other boats, further research into the environmental attitudes is conducted. Thereby, it can be analysed whether the results found in this study are valid for a wider population of more/all whale watching boats of Tenerife or should be seen as results for Freebird One only. Also it would be useful to undertake a longer-term survey in which different seasons and thereby different target groups can take part in the survey. Finally a study including levels of education would be interesting for a comparison with whale watchers' attitudes in other destinations worldwide.

Finally, it would be an option to indicate how factors not related to the accreditation (e.g. quality of the food, getting very close to the cetaceans) are evaluated by the tourists.

6.4 Buena Proa

If the accreditation is going to be implemented there has to be a form of reinforcement on Tenerife to make sure the boat owners will go through with all the factors that are included in the accreditation. But mostly, there has to be an organisation that will give the boat owners and crew involved positive feedback and that will encourage other companies to join them and become more "environmentally responsible" whale watching operators that will support the necessary research on the whales and dolphins they show their guests daily and weekly. For this to happen, Buena Proa will need to get some positive news from the main tour operators involved in this accreditation process. Further recommendations on this part of the route to financial resources can unfortunately not be elaborated on due to ongoing negotiations between all parties involved.

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Appendices

Appendix A: Questionnaire in English
Appendix B: Statistics: Who is the tourist?
Appendix C: Statistics: The Importance of Various Factors to the Whale
            Watching Tourists
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Appendix E: Statistics: Connection Willingness to Pay – Importance of Factors
Appendix F: Statistics: Importance of Factors in Manipulated Data Sets
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Appendix I: Table giving an indication of which boats work with which tour
            operators

Appendix A Questionnaire in English

Dear Whale Watcher,
Thank you very much for agreeing to take part in our Bachelor Thesis research. The aim of our project is to improve the quality of whale watching tours on Tenerife. Your responses are extremely valuable to us. If you feel that you do not want to answer a particular question, we will gladly accept your decision.

1.　　What is your age? _____ years.

2. What is your gender?　O　male　　　　　O　female

3. What is your home country? _____

4. Why did you choose to go on a whale watching trip?

_____

5. Have you been whale watching during past holidays?
　　　　O No, this is (will be) the first time　　O Yes, 2-4 times
　　　　O Yes, once before　　　　　　　　　　O Yes, more than 4 times

6. Where did you purchase your ticket?
　　　　O At the accommodation　　　　　O From a seller on the street
　　　　O At the harbour　　　　　　　　O Online
　　　　O Other: _____

7. Have you noticed or been informed about any of the following on board the whale   watching vessel?

a) A trained nature guide providing information　　O yes　　　O no
b) A recycling system　　　　　　　　　　　　　O yes　　　O no
c) Educational material for children　　　　　　　O yes　　　O no
d) Educational material for adults　　　　　　　　O yes　　　O no
e) A code of conduct for whale watching boats　　O yes　　　O no

8. Please indicate how important you find the following factors
(1= very important; 2= important; 3= neither important nor unimportant; 4= unimportant; 5= very unimportant)

	1	2	3	4	5
Environmental Conservation in general					
Environmental Conservation in whale watching					
A nature guide on board whale watching vessels providing information					
A recycling system on board whale watching vessels					
Research for the conservation of whales and dolphins on board the whale watching boats					
Educational material for children on board whale watching vessels					
Educational material for adults on board whale watching vessels					
Whale watching boats complying with the rules for approaching whales by the Canary Islands government					

9. The implementation of some of the factors mentioned above involves certain costs. Please indicate for each of the factors in the following table if they would be worth paying a total of € 1 extra for your boat trip. Please decide for each factor separately whether you would be willing to pay ("YES") or would not be willing to pay ("NO").

	Yes	No
A nature guide on board whale watching vessels providing information		
A recycling system on board whale watching vessels		
Research for the conservation of whales and dolphins on board the whale watching boats		
Educational material for children on board whale watching vessels		
Educational material for adults on board whale watching vessels		
Whale watching boats complying with the rules for approaching whales by the Canary Islands government		

Thank you very much for participating in this research. We appreciate your time.
Brigitte Kessels and Katrin Markull
Integrated Coastal Zone Management
Van Hall Larenstein, Leeuwarden, The Netherlands

Appendix B Statistics: Who is the tourist?

Age groups   Gender

Table 3: Frequency Table Age Groups

		Frequency	Percent
Valid	25-	158	17,4
	26-40	185	20,4
	41-55	286	31,5
	56-70	229	25,2
	71+	46	5,1
	Total	904	99,7
Missing	System	3	,3
Total		907	100,0

Gender

Table 4: Frequency Table Genders

		Frequency	Percent
Valid	Male	379	41,8
	Female	528	58,2
	Total	907	100,0

Nationalities
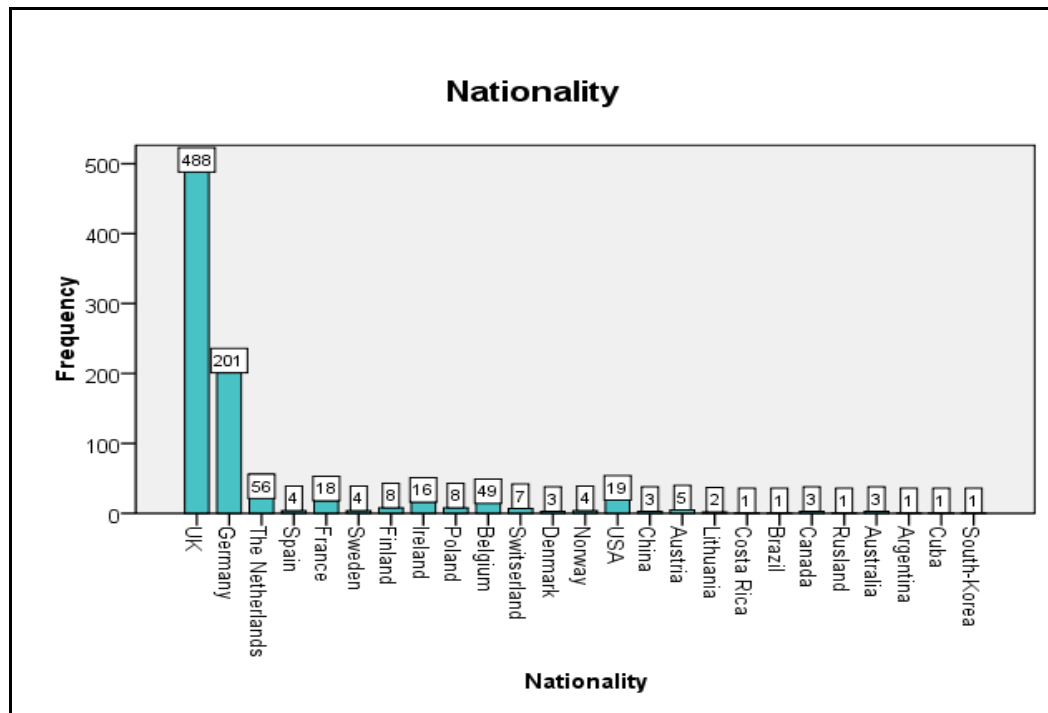
Figure 18: The Nationalities that Took Part in the Survey

54

Motivation factors
Table 5: Frequency Table of the Motivation Factors

		Frequency	Percent
Valid	Whales	620	68,4
	Children	17	1,9
	Nature	36	4,0
	Water	68	7,5
	Package	17	1,9
	Other	115	12,7
	Total	873	96,3
Missing	System	34	3,7
Total		907	100,0

Previous experience**Table 6: Frequency Table of the Tourists' Previous Experience**

		Frequency	Percent
Valid	First time	630	69,5
	Once before	160	17,6
	2-4 times	92	10,1
	More than 4 times	24	2,6
	Total	906	99,9
Missing	System	1	,1
Total		907	100,0

Ticket purchase
Table 7: Frequency Table Methods of Ticket Purchase

		Frequency	Percent
Valid	Accommodation	677	74,6
	Harbour	54	6,0
	Seller on street	74	8,2
	Online	15	1,7
	Package	21	2,3
	Cruise ship	32	3,5
	Other	30	3,3
	Total	903	99,6
Missing	System	4	,4
Total		907	100,0

Appendix C: The Importance of Various Factors to the Whale Watching Tourists

Importance of the 7 factors:

Table 8: Frequency Table Showing the Importance of the Various Factors

	Very Important	Important	Neither important nor unimportant	Unimportant	Very Unimportant
Environmental Conservation in General	66.7	25.8	3.2	0.6	3.4
Environmental Conservation in Whale Watching	65.0	26.7	4.0	1.0	3.0
Nature Guide	43.2	39.7	11.5	2.1	2.5
Recycling	42.1	35.2	15.7	2.4	3.2
Research	41.1	36.9	14.1	2.5	3.2
Educational Material Children	27.5	37.8	22.8	5.1	3.9
Educational Material Adults	24.9	41.7	23.5	5.0	3.0
Complying with Rules	69.6	20.5	4.2	1.1	3.9

Environmental Conservation in General

Table 9: Frequency Table Showing the Importance of Environmental Conservation in General

		Frequency	Percent
Valid	Very important	605	66,7
	Important	234	25,8
	Neither important nor unimportant	29	3,2
	Unimportant	5	,6
	Very unimportant	31	3,4
	Total	904	99,7
Missing	System	3	,3
Total		907	100,0

Environmental Conservation in Whale Watching

Table 10: Frequency Table Showing the Importance of Environmental Conservation in Whale Watching

		Frequency	Percent
Valid	Very important	590	65,0
	Important	242	26,7
	Neither important nor unimportant	36	4,0
	Unimportant	9	1,0
	Very unimportant	27	3,0
	Total	904	99,7
Missing	System	3	,3
Total		907	100,0

Nature Guide

Table 11: Frequency Table Showing the Importance of the Presence of a Nature Guide

		Frequency	Percent
Valid	Very important	392	43,2
	Important	360	39,7
	Neither important nor unimportant	104	11,5
	Unimportant	19	2,1
	Very Unimportant	23	2,5
	Total	898	99,0
Missing	System	9	1,0
Total		907	100,0

Recycling

Table 12: Frequency Table Showing the Importance of Recycling

		Frequency	Percent
Valid	Very important	382	42,1
	Important	319	35,2
	Neither important nor unimportant	142	15,7
	Unimportant	22	2,4
	Very unimportant	29	3,2
	Total	894	98,6
Missing	System	13	1,4
Total		907	100,0

Research
Table 13: Frequency Table Showing the Importance of Research for the Conservation of Cetaceans

		Frequency	Percent
Valid	Very important	373	41,1
	Important	335	36,9
	Neither important nor unimportant	128	14,1
	Unimportant	23	2,5
	Very unimportant	29	3,2
	Total	888	97,9
Missing	System	19	2,1
Total		907	100,0

Educational Material Children
Table 14: Frequency Table Showing the Importance of Educational Material for Children

		Frequency	Percent
Valid	Very important	249	27,5
	Important	343	37,8
	Neither important nor unimportant	207	22,8
	Unimportant	46	5,1
	Very unimportant	35	3,9
	Total	880	97,0
Missing	System	27	3,0
Total		907	100,0

Educational Material Adults
Table 15: Frequency Table Showing the Importance of Educational Material for Adults

		Frequency	Percent
Valid	Very important	226	24,9
	Important	378	41,7
	Neither important nor unimportant	213	23,5
	Unimportant	45	5,0
	Very unimportant	27	3,0
	Total	889	98,0
Missing	System	18	2,0
Total		907	100,0

Complying with the Rules
Table 16: Frequency Table Showing the Importance of the Boats Complying with the Rules

		Frequency	Percent
Valid	Very important	631	69,6
	Important	186	20,5
	Neither important nor unimportant	38	4,2
	Unimportant	10	1,1
	Very unimportant	35	3,9
	Total	900	99,2
Missing	System	7	,8
Total		907	100,0

Differences in Importance for Demographic Groups

Age * Imp.conservation.general

Table 17: Crosstab Age Groups*Importance of Environmental Conservation in General

			Imp.conservation.general			
			Important	Neither important nor unimportant	Unimportant	Total
Age	25-	Count	136	13	8	157
		% within Age	86,6%	8,3%	5,1%	100,0%
	26-40	Count	170	9	6	185
		% within Age	91,9%	4,9%	3,2%	100,0%
	41-55	Count	271	4	10	285
		% within Age	95,1%	1,4%	3,5%	100,0%
	56-70	Count	218	1	9	228
		% within Age	95,6%	,4%	3,9%	100,0%
	71+	Count	41	2	3	46
		% within Age	89,1%	4,3%	6,5%	100,0%
Total		Count	836	29	36	901
		% within Age	92,8%	3,2%	4,0%	100,0%

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	25,355[a]	8	,001
Likelihood Ratio	25,187	8	,001
Linear-by-Linear Association	2,681	1	,102
N of Valid Cases	901		

a. 2 cells (13,3%) have expected count less than 5. The minimum expected count is 1,48.

Age * Imp.conservation.whalewatching

Table 18: Crosstab Age Groups*Importance of Environmental Conservation in Whale Watching

			Imp.conservation.whalewatching			
			Important	Neither important nor unimportant	Unimportant	Total
Age	25-	Count	131	16	10	157
		% within Age	83,4%	10,2%	6,4%	100,0%
	26-40	Count	172	7	6	185
		% within Age	93,0%	3,8%	3,2%	100,0%
	41-55	Count	270	7	8	285
		% within Age	94,7%	2,5%	2,8%	100,0%

	56-70	Count	214	5	9	228
		% within Age	93,9%	2,2%	3,9%	100,0%
	71+	Count	42	1	3	46
		% within Age	91,3%	2,2%	6,5%	100,0%
Total		Count	829	36	36	901
		% within Age	92,0%	4,0%	4,0%	100,0%

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	24,840[a]	8	,002
Likelihood Ratio	20,694	8	,008
Linear-by-Linear Association	4,797	1	,029
N of Valid Cases	901		
a. 2 cells (13,3%) have expected count less than 5. The minimum expected count is 1,84.			

Age * Imp.nature.guide
Table 19: Crosstab Age Groups*Importance of the Presence of a Nature Guide

			Imp.nature.guide			
			Important	Neither important nor unimportant	Unimportant	Total
Age	25-	Count	116	31	10	157
		% within Age	73,9%	19,7%	6,4%	100,0%
	26-40	Count	159	20	6	185
		% within Age	85,9%	10,8%	3,2%	100,0%
	41-55	Count	240	33	9	282
		% within Age	85,1%	11,7%	3,2%	100,0%
	56-70	Count	197	16	13	226
		% within Age	87,2%	7,1%	5,8%	100,0%
	71+	Count	37	4	4	45
		% within Age	82,2%	8,9%	8,9%	100,0%
Total		Count	749	104	42	895
		% within Age	83,7%	11,6%	4,7%	100,0%

Table 20: Chi-Square Test: Age Groups*Importance of the Presence of a Nature Guide

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	20,998[a]	8	,007
Likelihood Ratio	19,978	8	,010
Linear-by-Linear Association	2,843	1	,092
N of Valid Cases	895		

a. 1 cells (6,7%) have expected count less than 5. The minimum expected count is 2,11.

Age * Imp.recycling
Table 21: Crosstab Age Groups* Importance of Recycling

			Imp.recycling			Total
			Important	Neither important nor unimportant	Unimportant	
Age	25-	Count	104	39	12	155
		% within Age	67,1%	25,2%	7,7%	100,0%
	26-40	Count	136	35	12	183
		% within Age	74,3%	19,1%	6,6%	100,0%
	41-55	Count	225	45	14	284
		% within Age	79,2%	15,8%	4,9%	100,0%
	56-70	Count	197	18	10	225
		% within Age	87,6%	8,0%	4,4%	100,0%
	71+	Count	36	5	3	44
		% within Age	81,8%	11,4%	6,8%	100,0%
Total		Count	698	142	51	891
		% within Age	78,3%	15,9%	5,7%	100,0%

Table 22: Chi-Square Test Age Groups*Importance of Recycling

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	26,704[a]	8	,001
Likelihood Ratio	27,446	8	,001
Linear-by-Linear Association	15,648	1	,000
N of Valid Cases	891		

a. 1 cells (6,7%) have expected count less than 5. The minimum expected count is 2,52.

Age * Imp.research

Table 23: Crosstab Age Groups*Importance of Research

			Imp.research			Total
			Important	Neither important nor unimportant	Unimportant	
Age	25-	Count	110	34	13	157
		% within Age	70,1%	21,7%	8,3%	100,0%
	26-40	Count	145	29	9	183
		% within Age	79,2%	15,8%	4,9%	100,0%
	41-55	Count	233	33	12	278
		% within Age	83,8%	11,9%	4,3%	100,0%
	56-70	Count	184	27	12	223
		% within Age	82,5%	12,1%	5,4%	100,0%
	71+	Count	34	4	6	44
		% within Age	77,3%	9,1%	13,6%	100,0%
Total		Count	706	127	52	885
		% within Age	79,8%	14,4%	5,9%	100,0%

Table 24: Chi-Square Test Age Groups*Importance of Research

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	19,205[a]	8	,014
Likelihood Ratio	17,440	8	,026
Linear-by-Linear Association	3,454	1	,063
N of Valid Cases	885		

a. 1 cells (6,7%) have expected count less than 5. The minimum expected count is 2,59.

Age * Imp.edu.children

Table 25: Crosstab Age Groups*Importance of Education Material for Children

			Imp.edu.children			Total
			Important	Neither important nor unimportant	Unimportant	
Age	25-	Count	82	53	22	157
		% within Age	52,2%	33,8%	14,0%	100,0%
	26-40	Count	112	52	19	183
		% within Age	61,2%	28,4%	10,4%	100,0%
	41-55	Count	201	55	20	276
		% within Age	72,8%	19,9%	7,2%	100,0%
	56-70	Count	166	43	14	223

			74,4%	19,3%	6,3%	100,0%
	71+	Count	28	4	6	38
		% within Age	73,7%	10,5%	15,8%	100,0%
Total		Count	589	207	81	877
		% within Age	67,2%	23,6%	9,2%	100,0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	33,451[a]	8	,000
Likelihood Ratio	33,328	8	,000
Linear-by-Linear Association	19,495	1	,000
N of Valid Cases	877		

a. 1 cells (6,7%) have expected count less than 5. The minimum expected count is 3,51.

Age * Imp.edu.adults

Table 26: Crosstab Age Groups*Importance of Educational Material Adults

			Imp.edu.adults			
			Important	Neither important nor unimportant	Unimportant	Total
Age	25-	Count	87	50	20	157
		% within Age	55,4%	31,8%	12,7%	100,0%
	26-40	Count	114	58	12	184
		% within Age	62,0%	31,5%	6,5%	100,0%
	41-55	Count	202	59	20	281
		% within Age	71,9%	21,0%	7,1%	100,0%
	56-70	Count	171	43	14	228
		% within Age	75,0%	18,9%	6,1%	100,0%
	71+	Count	28	3	6	37
		% within Age	75,7%	8,1%	16,2%	100,0%
Total		Count	602	213	72	887
		% within Age	67,9%	24,0%	8,1%	100,0%

Table 27: Chi-Square Test Age Groups*Importance Education Material Adults

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	32,204[a]	8	,000
Likelihood Ratio	32,097	8	,000
Linear-by-Linear Association	14,606	1	,000
N of Valid Cases	887		

a. 1 cells (6,7%) have expected count less than 5. The minimum expected count is 3,00.

Age * Imp.complying.rules niet significant (0.059)

Nationality * Imp.conservation.general

Table 28: Crosstab Nationalities*Importance of Environmental Conservation in General

			Imp.conservation.general			
			Important	Neither important nor unimportant	Unimportant	Total
Nationality	UK	Count	451	14	22	487
		% within Nationality	92,6%	2,9%	4,5%	100,0%
	Germany	Count	198	0	2	200
		% within Nationality	99,0%	,0%	1,0%	100,0%
	The Netherlands	Count	47	4	4	55
		% within Nationality	85,5%	7,3%	7,3%	100,0%
	Belgium	Count	38	8	3	49
		% within Nationality	77,6%	16,3%	6,1%	100,0%
Total		Count	734	26	31	791
		% within Nationality	92,8%	3,3%	3,9%	100,0%

Table 29: Chi-Square Test Nationalities*Importance of Environmental Conservation in General

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	44,188[a]	6	,000
Likelihood Ratio	39,100	6	,000
Linear-by-Linear Association	7,607	1	,006
N of Valid Cases	791		

a. 4 cells (33,3%) have expected count less than 5. The minimum expected count is 1,61.

Nationality * Imp.conservation.whalewatching

Table 30: Crosstab Nationalities*Importance of Environmental Conservation in Whale Watching

			Imp.conservation.whalewatching			
			Important	Neither important nor unimportant	Unimportant	Total
Nationality	UK	Count	444	19	23	486
		% within Nationality	91,4%	3,9%	4,7%	100,0%
	Germany	Count	198	1	2	201
		% within Nationality	98,5%	,5%	1,0%	100,0%
	The Netherlands	Count	48	3	4	55

		% within Nationality	87,3%	5,5%	7,3%	100,0%
	Belgium	Count	37	10	2	49
		% within Nationality	75,5%	20,4%	4,1%	100,0%
Total		Count	727	33	31	791
		% within Nationality	91,9%	4,2%	3,9%	100,0%

Table 31: Chi-Square Test Nationalities* Environmental Conservation in Whale Watching

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	47,082[a]	6	,000
Likelihood Ratio	37,543	6	,000
Linear-by-Linear Association	5,802	1	,016
N of Valid Cases	791		

a. 4 cells (33,3%) have expected count less than 5. The minimum expected count is 1,92.

Nationality * Imp.nature.guide

Table 32: Crosstab Nationalities*Importance of the Presence of a Nature Guide

			Imp.nature.guide			
			Important	Neither important nor unimportant	Unimportant	Total
Nationality	UK	Count	403	54	27	484
		% within Nationality	83,3%	11,2%	5,6%	100,0%
	Germany	Count	176	20	3	199
		% within Nationality	88,4%	10,1%	1,5%	100,0%
	The Netherlands	Count	44	8	3	55
		% within Nationality	80,0%	14,5%	5,5%	100,0%
	Belgium	Count	36	12	1	49
		% within Nationality	73,5%	24,5%	2,0%	100,0%
Total		Count	659	94	34	787
		% within Nationality	83,7%	11,9%	4,3%	100,0%

Table 33: Chi-Square Test Nationalities*Importance of the Presence of a Nature Guide

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	15,036[a]	6	,020
Likelihood Ratio	14,769	6	,022
Linear-by-Linear Association	,714	1	,398
N of Valid Cases	787		

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	15,036[a]	6	,020
Likelihood Ratio	14,769	6	,022
Linear-by-Linear Association	,714	1	,398
N of Valid Cases	787		

a. 2 cells (16,7%) have expected count less than 5. The minimum expected count is 2,12.

Nationality * Imp.recycling

Table 34: Crosstab Nationalities*Importance of Recycling

			Imp.recycling			Total
			Important	Neither important nor unimportant	Unimportant	
Nationality	UK	Count	388	66	26	480
		% within Nationality	80,8%	13,8%	5,4%	100,0%
	Germany	Count	152	41	5	198
		% within Nationality	76,8%	20,7%	2,5%	100,0%
	The Netherlands	Count	40	6	9	55
		% within Nationality	72,7%	10,9%	16,4%	100,0%
	Belgium	Count	31	14	4	49
		% within Nationality	63,3%	28,6%	8,2%	100,0%
Total		Count	611	127	44	782
		% within Nationality	78,1%	16,2%	5,6%	100,0%

Table 35: Chi-Square Test Nationalities*Importance of Recycling

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	27,155[a]	6	,000
Likelihood Ratio	23,382	6	,001
Linear-by-Linear Association	7,238	1	,007
N of Valid Cases	782		

a. 2 cells (16,7%) have expected count less than 5. The minimum expected count is 2,76.

Nationality * Imp.research not significant (0,159)

Nationality * Imp.edu.children

Table 36: Crosstab Nationalities*Importance of Education Material for Children

	Imp.edu.children			Total
	Important	Neither important nor unimportant	Unimportant	

Nationality	UK	Count	358	84	32	474
		% within Nationality	75,5%	17,7%	6,8%	100,0%
	Germany	Count	110	67	16	193
		% within Nationality	57,0%	34,7%	8,3%	100,0%
	The Netherlands	Count	36	11	8	55
		% within Nationality	65,5%	20,0%	14,5%	100,0%
	Belgium	Count	23	19	6	48
		% within Nationality	47,9%	39,6%	12,5%	100,0%
Total		Count	527	181	62	770
		% within Nationality	68,4%	23,5%	8,1%	100,0%

Table 37: Chi-Square Test Nationalities*Importance of Environmental Education Material for Children

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	37,897[a]	6	,000
Likelihood Ratio	36,090	6	,000
Linear-by-Linear Association	13,756	1	,000
N of Valid Cases	770		

a. 2 cells (16,7%) have expected count less than 5. The minimum expected count is 3,86.

Nationality * Imp.edu.adults
Table 38: Crosstab Nationalities*Importance of Education Material for Adults

			Imp.edu.adults			
			Important	Neither important nor unimportant	Unimportant	Total
Nationality	UK	Count	363	86	33	482
		% within Nationality	75,3%	17,8%	6,8%	100,0%
	Germany	Count	115	67	11	193
		% within Nationality	59,6%	34,7%	5,7%	100,0%
	The Netherlands	Count	34	14	7	55
		% within Nationality	61,8%	25,5%	12,7%	100,0%
	Belgium	Count	23	19	7	49
		% within Nationality	46,9%	38,8%	14,3%	100,0%
Total		Count	535	186	58	779
		% within Nationality	68,7%	23,9%	7,4%	100,0%

Table 39: Chi-Square Test: Nationalities*Importance of Educational Material for Adults

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	36,781[a]	6	,000
Likelihood Ratio	35,089	6	,000
Linear-by-Linear Association	16,607	1	,000
N of Valid Cases	779		

a. 2 cells (16,7%) have expected count less than 5. The minimum expected count is 3,65.

Nationality * Imp.complying.rules

Table 40: Crosstab Nationalities*Importance of the Boats Complying with the Rules

			Imp.complying.rules			Total
			Important	Neither important nor unimportant	Unimportant	
Nationality	UK	Count	450	10	26	486
		% within Nationality	92,6%	2,1%	5,3%	100,0%
	Germany	Count	192	6	2	200
		% within Nationality	96,0%	3,0%	1,0%	100,0%
	The Netherlands	Count	48	2	5	55
		% within Nationality	87,3%	3,6%	9,1%	100,0%
	Belgium	Count	35	8	4	47
		% within Nationality	74,5%	17,0%	8,5%	100,0%
Total		Count	725	26	37	788
		% within Nationality	92,0%	3,3%	4,7%	100,0%

Table 41: Chi-Square Test Nationalities*Importance of the Boats Complying with the Rules

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	41,216[a]	6	,000
Likelihood Ratio	30,194	6	,000
Linear-by-Linear Association	9,938	1	,002
N of Valid Cases	788		

a. 4 cells (33,3%) have expected count less than 5. The minimum expected count is 1,55.

Gender – All Factors : Not significant
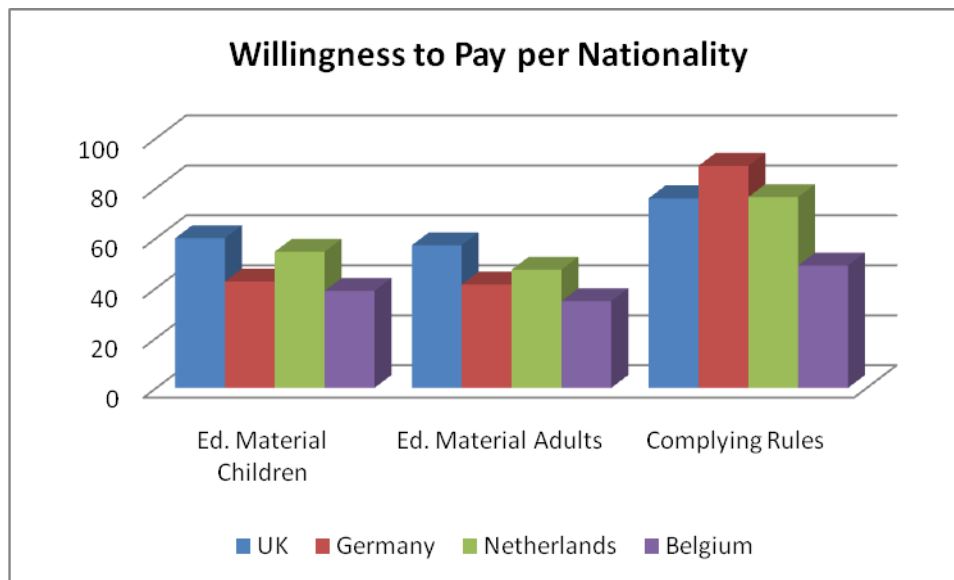
Figure 19: The Tourists' Willingness to Pay for the Accreditation Factors

An overview of the percentages of tourists willing to pay for three of the accreditation factors per nationality is given in Figure XXX. Other accreditation factors did not show a significant connection between nationalities.

Appendix D: The Tourists' Willingness to Pay for the Factors

Table 42: Frequency Table: The Tourists' Willingness to Pay for the Accreditation Factors

Factor	Yes	No
Nature guide	77.1%	21.9%
Recycling	55.8%	43.1%
Research	73.2%	25.6%
Educational Material for Children	52.8%	45.2%
Educational Material for Adults	50.4%	48.4%
Complying with Rules	76.8%	22.3%

The percentages do not add up to 100% due to missing values.

Differences in Willingness to Pay Between Different Age Groups, Nationalities and Genders

GENDER – Euro Nature Guide not significant

GENDER – Euro Recycling not significant

GENDER – Euro Research not significant

GENDER – Euro Education Children not significant

GENDER – Euro Adults not significant

GENDER – Euro Complying Rules not significant

Age – Euro Nature Guide not significant

Age – Euro Complying Rules not significant

Nationality – Euro Nature Guide not significant

Nationality – Euro Recycling not significant

Nationality – Euro Research not significant

Age * Euro.recycling

Table 43: Crosstab Age Groups*Willingness to Pay for Recycling

Crosstab						
				Euro.recycling		
				Yes	No	Total
Age	25-	Count		74	83	157
		% within Age		47,1%	52,9%	100,0%
	26-40	Count		94	90	184
		% within Age		51,1%	48,9%	100,0%
	41-55	Count		161	124	285
		% within Age		56,5%	43,5%	100,0%
	56-70	Count		146	77	223
		% within Age		65,5%	34,5%	100,0%
	71+	Count		32	12	44
		% within Age		72,7%	27,3%	100,0%
Total		Count		507	386	893

	% within Age	56,8%	43,2%	100,0%

Table 44: Chi-Square Test Age Groups* Willingness to Pay for Recycling

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	19,816[a]	4	,001
Likelihood Ratio	20,112	4	,000
Linear-by-Linear Association	19,107	1	,000
N of Valid Cases	893		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 19,02.

Age * Euro.research

Table 45: Crosstab Age Groups*Willingness to Pay for Research

Crosstab

			Euro.research		
			Yes	No	Total
Age	25-	Count	105	52	157
		% within Age	66,9%	33,1%	100,0%
	26-40	Count	137	46	183
		% within Age	74,9%	25,1%	100,0%
	41-55	Count	203	81	284
		% within Age	71,5%	28,5%	100,0%
	56-70	Count	184	43	227
		% within Age	81,1%	18,9%	100,0%
	71+	Count	33	10	43
		% within Age	76,7%	23,3%	100,0%
Total		Count	662	232	894
		% within Age	74,0%	26,0%	100,0%

Table 46 Chi Square Test Age Groups*Willingness to Pay for Research

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	11,204[a]	4	,024
Likelihood Ratio	11,377	4	,023
Linear-by-Linear Association	6,832	1	,009
N of Valid Cases	894		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 11,16.

Age * Euro.edu.children

Table 47: Crosstab Age Group*Willingness to Pay for Education Material for Children

Crosstab					
			Euro.edu.children		
			Yes	No	Total
Age	25-	Count	66	89	155
		% within Age	42,6%	57,4%	100,0%
	26-40	Count	87	97	184
		% within Age	47,3%	52,7%	100,0%
	41-55	Count	155	125	280
		% within Age	55,4%	44,6%	100,0%
	56-70	Count	139	84	223
		% within Age	62,3%	37,7%	100,0%
	71+	Count	21	22	43
		% within Age	48,8%	51,2%	100,0%
Total		Count	468	417	885
		% within Age	52,9%	47,1%	100,0%

Table 48: Chi-Square Test Age Groups*Willingness to Pay for Education Material for Children

Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	17,879[a]	4	,001
Likelihood Ratio	17,978	4	,001
Linear-by-Linear Association	12,367	1	,000
N of Valid Cases	885		
a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 20,26.			

Age * Euro.edu.adults

Table 49: Crosstab Age Group*Willingness to Pay for Education Material for Adults

Crosstab					
			Euro.edu.adults		
			Yes	No	Total
Age	25-	Count	68	88	156
		% within Age	43,6%	56,4%	100,0%
	26-40	Count	80	103	183
		% within Age	43,7%	56,3%	100,0%
	41-55	Count	140	143	283
		% within Age	49,5%	50,5%	100,0%
	56-70	Count	143	82	225
		% within Age	63,6%	36,4%	100,0%
	71+	Count	21	23	44

		% within Age	47,7%	52,3%	100,0%
Total		Count	452	439	891
		% within Age	50,7%	49,3%	100,0%

Table 50: Chi-Square Test Age Groups* Willingness to Pay for Education Material for Adults

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	21,930[a]	4	,000
Likelihood Ratio	22,149	4	,000
Linear-by-Linear Association	12,838	1	,000
N of Valid Cases	891		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 21,68.

NATIONALITY

Nationality * Euro.edu.children

Table 51: Crosstab Nationality*Willingness to Pay for Education Material for Children

Crosstab

			Euro.edu.children		Total
			Yes	No	
Nationality	UK	Count	287	192	479
		% within Nationality	59,9%	40,1%	100,0%
	Germany	Count	83	112	195
		% within Nationality	42,6%	57,4%	100,0%
	The Netherlands	Count	30	25	55
		% within Nationality	54,5%	45,5%	100,0%
	Belgium	Count	19	30	49
		% within Nationality	38,8%	61,2%	100,0%
Total		Count	419	359	778
		% within Nationality	53,9%	46,1%	100,0%

Table 52: Chi-Square Test Nationality*Willingness to Pay for Education Material for Children

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	21,579[a]	3	,000
Likelihood Ratio	21,610	3	,000
Linear-by-Linear Association	8,438	1	,004
N of Valid Cases	778		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 22,61.

Nationality * Euro.edu.adults

Table 53: Crosstab Nationality*Willingness to Pay for Education Material for Adults

rosstab					
			Euro.edu.adults		
			Yes	No	Total
Nationality	UK	Count	275	207	482
		% within Nationality	57,1%	42,9%	100,0%
	Germany	Count	82	116	198
		% within Nationality	41,4%	58,6%	100,0%
	The Netherlands	Count	26	29	55
		% within Nationality	47,3%	52,7%	100,0%
	Belgium	Count	17	32	49
		% within Nationality	34,7%	65,3%	100,0%
Total		Count	400	384	784
		% within Nationality	51,0%	49,0%	100,0%

Table 54: Chi-Square Test Nationalities*Willingness to Pay for Education Material for Adults

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	19,869[a]	3	,000
Likelihood Ratio	19,996	3	,000
Linear-by-Linear Association	9,854	1	,002
N of Valid Cases	784		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 24,00.

Nationality * Euro.complying.rules

Table 55: Crosstab Nationality*Willingness to Pay for the Boats Complying with the Rules

Crosstab					
			Euro.complying.rules		
			Yes	No	Total
Nationality	UK	Count	368	117	485
		% within Nationality	75,9%	24,1%	100,0%
	Germany	Count	176	22	198
		% within Nationality	88,9%	11,1%	100,0%
	The Netherlands	Count	42	13	55
		% within Nationality	76,4%	23,6%	100,0%
	Belgium	Count	24	25	49
		% within Nationality	49,0%	51,0%	100,0%
Total		Count	610	177	787
		% within Nationality	77,5%	22,5%	100,0%

Table 56: Chi-Square Test Nationalities*Willingness to Pay for the Boats Complying with the Rules

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	38,371[a]	3	,000
Likelihood Ratio	36,888	3	,000
Linear-by-Linear Association	17,043	1	,000
N of Valid Cases	787		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 11,02.

A Age

Table 57 Crosstab Age Groups*Number of Factors Willing to Pay for

Number.of.Yes * Age Crosstabulation

			Age					Total
			25-	26-40	41-55	56-70	71+	
Number.of.Yes	0	Count	8	10	23	13	5	59
		% within Age	5,1%	5,4%	8,0%	5,7%	10,9%	6,5%
	1	Count	11	16	12	13	4	56
		% within Age	7,0%	8,6%	4,2%	5,7%	8,7%	6,2%
	2	Count	28	19	40	16	7	110
		% within Age	17,7%	10,3%	14,0%	7,0%	15,2%	12,2%
	3	Count	32	46	45	34	2	159
		% within Age	20,3%	24,9%	15,7%	14,8%	4,3%	17,6%
	4	Count	33	27	41	26	10	137
		% within Age	20,9%	14,6%	14,3%	11,4%	21,7%	15,2%
	5	Count	14	18	26	25	2	85
		% within Age	8,9%	9,7%	9,1%	10,9%	4,3%	9,4%
	6	Count	32	49	99	102	16	298
		% within Age	20,3%	26,5%	34,6%	44,5%	34,8%	33,0%
Total		Count	158	185	286	229	46	904
		% within Age	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Table 58: Chi-Square Test Age Groups* Number of Factors Willing to Pay for

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	59,572[a]	24	,000
Likelihood Ratio	61,608	24	,000
Linear-by-Linear Association	12,044	1	,001
N of Valid Cases	904		

a. 3 cells (8,6%) have expected count less than 5. The minimum expected count is 2,85.

B Gender – Number of yes not significant
C Nationality

Table 59: Crosstab Nationality* Number of Factors Willing to Pay for

Number.of.Yes * Nationality Crosstabulation			Nationality				Total
			UK	Germany	The Netherlands	Belgium	
Number.of.Yes	0	Count	37	9	2	5	53
		% within Nationality	7,6%	4,5%	3,6%	10,2%	6,7%
	1	Count	31	8	3	6	48
		% within Nationality	6,4%	4,0%	5,4%	12,2%	6,0%
	2	Count	54	25	8	7	94
		% within Nationality	11,1%	12,4%	14,3%	14,3%	11,8%
	3	Count	74	49	8	11	142
		% within Nationality	15,2%	24,4%	14,3%	22,4%	17,9%
	4	Count	59	39	16	3	117
		% within Nationality	12,1%	19,4%	28,6%	6,1%	14,7%
	5	Count	44	21	5	6	76
		% within Nationality	9,0%	10,4%	8,9%	12,2%	9,6%
	6	Count	189	50	14	11	264
		% within Nationality	38,7%	24,9%	25,0%	22,4%	33,2%
Total		Count	488	201	56	49	794
		% within Nationality	100,0%	100,0%	100,0%	100,0%	100,0%

Table 60: Chi-Square Test Nationality*Number of Factors Willing to Pay for

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	44,256[a]	18	,001
Likelihood Ratio	43,007	18	,001
Linear-by-Linear Association	6,255	1	,012
N of Valid Cases	794		

a. 5 cells (17,9%) have expected count less than 5. The minimum expected count is 2,96.

Appendix E: Statistics: Connection Willingness to Pay – Importance of Factors

Table 61 Crosstab Connection Importance and Willingness to Pay for Nature Guide

			Imp.nature.guide					
			Very important	Important	Neither important nor unimportant	Unimportant	Very Unimportant	Total
Euro.nature.guide	Yes	Count	333	281	51	11	14	690
		% within Euro.nature.guide	48,3%	40,7%	7,4%	1,6%	2,0%	100,0%
		% within Imp.nature.guide	85,4%	78,5%	49,5%	64,7%	60,9%	77,4%
		% of Total	37,4%	31,5%	5,7%	1,2%	1,6%	77,4%
	No	Count	57	77	52	6	9	201
		% within Euro.nature.guide	28,4%	38,3%	25,9%	3,0%	4,5%	100,0%
		% within Imp.nature.guide	14,6%	21,5%	50,5%	35,3%	39,1%	22,6%
		% of Total	6,4%	8,6%	5,8%	,7%	1,0%	22,6%
Total		Count	390	358	103	17	23	891
		% within Euro.nature.guide	43,8%	40,2%	11,6%	1,9%	2,6%	100,0%
		% within Imp.nature.guide	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	43,8%	40,2%	11,6%	1,9%	2,6%	100,0%

Table 62: Chi-Square Test Connection Importance and Willingness to Pay for Nature Guide

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	65,488[a]	4	,000
Likelihood Ratio	58,529	4	,000
Linear-by-Linear Association	44,657	1	,000
N of Valid Cases	891		

a. 1 cells (10,0%) have expected count less than 5. The minimum expected count is 3,84.

Table 63: Crosstab Connection Importance and Willingness to Pay for Recycling

			Imp.recycling					
			Very important	Important	Neither important nor unimportant	Unimportant	Very unimportant	Total
Euro.recycling	Yes	Count	276	174	31	8	15	504
		% within Euro.recycling	54,8%	34,5%	6,2%	1,6%	3,0%	100,0%
		% within Imp.recycling	73,6%	54,7%	21,8%	36,4%	53,6%	56,9%
		% of Total	31,2%	19,7%	3,5%	,9%	1,7%	56,9%
	No	Count	99	144	111	14	13	381
		% within Euro.recycling	26,0%	37,8%	29,1%	3,7%	3,4%	100,0%
		% within Imp.recycling	26,4%	45,3%	78,2%	63,6%	46,4%	43,1%
		% of Total	11,2%	16,3%	12,5%	1,6%	1,5%	43,1%
Total		Count	375	318	142	22	28	885
		% within Euro.recycling	42,4%	35,9%	16,0%	2,5%	3,2%	100,0%
		% within Imp.recycling	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	42,4%	35,9%	16,0%	2,5%	3,2%	100,0%

Table 64: Chi-Square Test Connection Importance and Willingness to Pay for Recycling

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	118,416[a]	4	,000
Likelihood Ratio	122,267	4	,000
Linear-by-Linear Association	74,419	1	,000
N of Valid Cases	885		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 9,47.

Table 65: Crosstab Connection Importance and Willingness to Pay for Research

			Imp.research					
			Very important	Important	Neither important nor unimportant	Unimportant	Very unimportant	Total
Euro.research	Yes	Count	310	255	56	9	20	650
		% within Euro.research	47,7%	39,2%	8,6%	1,4%	3,1%	100,0%
		% within Imp.research	84,0%	76,6%	44,1%	39,1%	74,1%	73,9%

		% of Total	35,3%	29,0%	6,4%	1,0%	2,3%	73,9%
	No	Count	59	78	71	14	7	229
		% within Euro.research	25,8%	34,1%	31,0%	6,1%	3,1%	100,0%
		% within Imp.research	16,0%	23,4%	55,9%	60,9%	25,9%	26,1%
		% of Total	6,7%	8,9%	8,1%	1,6%	,8%	26,1%
Total		Count	369	333	127	23	27	879
		% within Euro.research	42,0%	37,9%	14,4%	2,6%	3,1%	100,0%
		% within Imp.research	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	42,0%	37,9%	14,4%	2,6%	3,1%	100,0%

Table 66: Chi-Square Test Connection Importance and Willingness to Pay for Research

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	93,815[a]	4	,000
Likelihood Ratio	85,544	4	,000
Linear-by-Linear Association	52,574	1	,000
N of Valid Cases	879		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 5,99.

Table 67: Crosstab Connection Importance and Willingness to Pay for Education Material for Children

			Imp.edu.children					
			Very important	Important	Neither important nor unimportant	Unimportant	Very unimportant	Total
Euro.edu.children	Yes	Count	190	208	39	13	12	462
		% within Euro.edu.children	41,1%	45,0%	8,4%	2,8%	2,6%	100,0%
		% within Imp.edu.children	77,2%	61,2%	18,8%	28,9%	37,5%	53,1%
		% of Total	21,8%	23,9%	4,5%	1,5%	1,4%	53,1%
	No	Count	56	132	168	32	20	408
		% within Euro.edu.children	13,7%	32,4%	41,2%	7,8%	4,9%	100,0%
		% within Imp.edu.children	22,8%	38,8%	81,2%	71,1%	62,5%	46,9%
		% of Total	6,4%	15,2%	19,3%	3,7%	2,3%	46,9%
Total		Count	246	340	207	45	32	870
		% within Euro.edu.children	28,3%	39,1%	23,8%	5,2%	3,7%	100,0%

| | % within Imp.edu.children | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% |
| | % of Total | 28,3% | 39,1% | 23,8% | 5,2% | 3,7% | 100,0% |

Table 68: Chi-Square Test Connection Importance and Willingness to Pay for Education Material for Children

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	177,727[a]	4	,000
Likelihood Ratio	187,820	4	,000
Linear-by-Linear Association	124,913	1	,000
N of Valid Cases	870		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 15,01.

Table 69: Crosstab Connection Importance and Willingness to Pay for Education Material for Adults

			Imp.edu.adults					
			Very important	Important	Neither important nor unimportant	Unimportant	Very unimportant	Total
Euro.edu.adults	Yes	Count	174	211	39	11	13	448
		% within Euro.edu.adults	38,8%	47,1%	8,7%	2,5%	2,9%	100,0%
		% within Imp.edu.adults	78,0%	56,3%	18,4%	25,0%	50,0%	50,9%
		% of Total	19,8%	24,0%	4,4%	1,3%	1,5%	50,9%
	No	Count	49	164	173	33	13	432
		% within Euro.edu.adults	11,3%	38,0%	40,0%	7,6%	3,0%	100,0%
		% within Imp.edu.adults	22,0%	43,7%	81,6%	75,0%	50,0%	49,1%
		% of Total	5,6%	18,6%	19,7%	3,8%	1,5%	49,1%
Total		Count	223	375	212	44	26	880
		% within Euro.edu.adults	25,3%	42,6%	24,1%	5,0%	3,0%	100,0%
		% within Imp.edu.adults	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	25,3%	42,6%	24,1%	5,0%	3,0%	100,0%

Table 70: Chi-Square Test Connection Importamce and Willingness to Pay for Education Material for Children

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	171,422[a]	4	,000
Likelihood Ratio	182,920	4	,000
Linear-by-Linear Association	114,283	1	,000
N of Valid Cases	880		

a. 0 cells (,0%) have expected count less than 5. The minimum expected count is 12,76.

Table 71 Crosstab Connection Importance and Willingness to Pay for the Boats Complying with the Rules

			Imp.complying.rules					Total
			Very important	Important	Neither important nor unimportant	Unimportant	Very unimportant	
Euro.complying.rules	Yes	Count	522	122	19	1	26	690
		% within Euro.complying.rules	75,7%	17,7%	2,8%	,1%	3,8%	100,0%
		% within Imp.complying.rules	83,5%	66,3%	50,0%	10,0%	74,3%	77,4%
		% of Total	58,5%	13,7%	2,1%	,1%	2,9%	77,4%
	No	Count	103	62	19	9	9	202
		% within Euro.complying.rules	51,0%	30,7%	9,4%	4,5%	4,5%	100,0%
		% within Imp.complying.rules	16,5%	33,7%	50,0%	90,0%	25,7%	22,6%
		% of Total	11,5%	7,0%	2,1%	1,0%	1,0%	22,6%
Total		Count	625	184	38	10	35	892
		% within Euro.complying.rules	70,1%	20,6%	4,3%	1,1%	3,9%	100,0%
		% within Imp.complying.rules	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	70,1%	20,6%	4,3%	1,1%	3,9%	100,0%

Table 72: Chi-Square Test Connection Importance and Willingness to Pay for the Boats Complying with the Rules

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	68,706[a]	4	,000
Likelihood Ratio	60,704	4	,000
Linear-by-Linear Association	31,534	1	,000
N of Valid Cases	892		

a. 1 cells (10,0%) have expected count less than 5. The minimum expected count is 2,26.

Appendix F Statistics: Importance of accreditation factors in manipulated data sets

Table 73: Frequency Tables Manipulated Datasets Importance of Environmental Conservation in General

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	635	600	600	605	605	66,7
	Important	235	230	230	234	234	25,8
	Neither important nor unimportant	29	27	27	29	29	3,2
	Unimportant	3	4	4	5	5	,6
	Very unimportant	2	1	1	31	31	3,4
	Total	904	862	862	904	904	99,7
Missing	System	3	7	7	3	3	,3
Total		907	100,0	869	100,0	907	100

Table 74: Frequency Tables Manipulated Datasets Importance of Environmnetal Conservation in Whale Watching

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	613	67,6	582	67,0	590	65,0
	Important	248	27,3	240	27,8	242	26,7
	Neither important nor unimportant	36	4,0	34	3,9	36	4,0
	Unimportant	3	,3	4	,65	9	1,0
	Very unimportant	4	,4	2	,2	27	3,0
	Total	904	99,7	862	99,2	904	99,7
Missing	System	3	,3	7	,8	3	,3
Total		907	100,0	869	100,0	907	100,0

Table 75: Frequency Tables Manipulated Datasets Importance of the Presence of a Nature Guide

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	409	45,1	387	44,5	392	43,2
	Important	372	41,0	357	41,1	360	39,7
	Neither important nor unimportant	104	11,5	100	11,5	104	11,5
	Unimportant	7	,8	7	,8	19	2,1
	Very unimportant	6	,7	5	,6	23	2,5
	Total	898	99,0	856	98,5	898	99,0
Missing	System	9	1,0	13	1,5	9	1,0
Total		907	100,0	869	100,0	907	100,0

Table 76: Frequency Tables Manipulated Datasets Importance of Recycling

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	405	44,7	377	43,4	382	42,1
	Important	328	36,2	316	36,4	319	35,2
	Neither important nor unimportant	142	15,7	140	16,1	142	15,7
	Unimportant	13	1,4	14	1,6	22	2,4
	Very unimportant	6	,7	6	,7	29	3,2
	Total	894	98,6	853	98,2	894	98,6
Missing	System	13	1,4	16	1,8	13	1,4
Total		907	100,0	869	100,0	907	100,0

Table 77: Frequency Tables Manipulated Datasets Importance of Research

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	394	43,4	369	42,5	373	41,1
	Important	343	37,8	330	38,0	335	36,9
	Neither important nor unimportant	128	14,1	125	14,4	128	14,1
	Unimportant	16	1,8	16	1,8	23	2,5
	Very unimportant	7	,8	7	,8	29	3,2
	Total	888	97,9	847	97,5	888	97,9
Missing	System	19	2,1	22	2,5	19	2,1
Total		907	100,0	869	100,0	907	100,0

Table 78: Frequency Tables Manipulated Datasets Importance of Education Material for Children

Imp.edu.children

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	266	29,3	246	28,3	249	27,5
	Important	351	38,7	336	38,7	343	37,8
	Neither important nor unimportant	207	22,8	202	23,2	207	22,8
	Unimportant	38	4,2	36	4,1	46	5,1
	Very unimportant	18	2,0	18	2,1	35	3,9
	Total	880	97,0	838	96,4	880	97,0
Missing	System	27	3,0	31	3,6	27	3,0
Total		907	100,0	869	100,0	907	100,0

Table 79: Frequency Tables Manipulated Datasets Importance of Education Material for Adults

Imp.edu.adults

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	243	26,8	223	25,7	226	24,9
	Important	388	42,8	372	42,8	378	41,7
	Neither important nor unimportant	213	23,5	209	24,1	213	23,5
	Unimportant	35	3,9	33	3,8	45	5,0
	Very unimportant	10	1,1	10	1,2	27	3,0
	Total	889	98,0	847	97,5	889	98,0
Missing	System	18	2,0	22	2,5	18	2,0
Total		907	100,0	869	100,0	907	100,0

Table 80: Frequency Tables Manipulated Datasets Importance of the Boats Complying with the Rules

Imp.complying.with.rules

		Data reversed Frequency	Percent	Data deleted Frequency	Percent	Data original Frequency	Percent
Valid	Very important	663	73,1	624	71,8	631	69,6
	Important	187	20,6	184	21,2	186	20,5
	Neither important nor unimportant	38	4,2	38	4,4	38	4,2
	Unimportant	9	1,0	10	1,2	10	1,1
	Very unimportant	3	,3	2	,2	35	3,9
	Total	900	99,2	858	98,7	900	99,2
Missing	System	7	,8	11	1,3	7	,8
Total		907	100,0	869	100,0	907	100,0

Appendix G Legislation on whale watching in the Canary Islands

The decree 178/2000 "DECRETO 178/2000, de 6 de septiembre, por el que se regulan las actividades de observación de cetáceos" This document is the update of the decree 320 from 1995 and regulates whale watching activities on the Canary Islands. It was developed by the Spanish Ministry of Planning and Environment Policy (Consejería de Política Territorial y Medio Ambiente). The decree sets the standards with which whale watching operators have to comply in order to be officially registered as a whale watching operator. Without this registration, any whale watching activity is illegal. The standards include those behaviours stated in the decree 1727/2007 as well as an Environmental Impact Assessment.

The registration has to be updated each year. Once registered, the boats have to carry the "Barco Azul/Blue Flag" (Figure 1) that shows tourists which operators are registered.

Figure 20: The Blue Flag- Barco Azul

If vessels do not comply with the standards, penalties such as fines or a cancellation of the registration apply (Boletín Oficial de Canarias (Year unknown)).

Decree 1727/2007: "Real Decreto 1727/2007, de 21 de diciembre, por el que se establecen medidas de protección de los cetáceos." which deals with the protection of cetaceans in general. The decree was developed by the Spanish Ministry of Planning and Environment Policy (Consejería de Política Territorial y Medio Ambiente) in consultation with other organisations such as the National Commission for Protection of Nature (Comisión Nacional de Protección de la Naturaleza), the Environment Sector Conference (Conferencia Sectorial de Medio Ambiente) and the Advisory Council on the Environment (Consejo Asesor de Medio Ambiente). The document includes whale watching activities as well as research activities, fishing and all other activities in the water and in the air and aims at protecting cetaceans to help ensure their survival and conservation status. The decree defines general rules for behaviour around cetaceans and prohibits any activity that can

cause "death, injury, discomfort or concern to cetaceans" (Boletín Oficial del Estado 2008), including physical contact with the cetaceans, feeding the animals and interrupting the free movement of the animals. Some of these activities, such as the swimming with dolphins, are permitted in other countries such as New Zealand where swimming with dolphins is allowed with authorised tour operators (New Zealand Department of Conservation 2005). The decree

also lays out a zonation with specific rules for behaviour in each zone (see Figure 2 for zonation).

The area of exclusion (Zona de Exclusión) is a 60 m radius around a cetacean or group of cetaceans. It is prohibited to enter or remain in this zone and to have the engine running if a whale is approaching a vessel, entering the area of exclusion (Boletín Oficial del Estado 2008).
The area of restricted stay (Zona de Permanencia Restringid) is the area between 60 and 300 m around a cetacean or group of cetaceans. In this zone, no more than two vessels may be present at any time. On top of that is it prohibited to enter this zone if there is a calve isolated from the mother in the zone (Boletín Oficial del Estado 2008).
The area of approximation (Zona de Aproximación) extends from the outer border of the area of restricted stay (300 m around cetaceans) to 500 m around the cetaceans. In this area a maximum of two boats can wait to approach the area of restricted stay if there are already two vessels present in the area of restricted stay. The vessels in the area of approximation can enter the area of restricted stay if the other boats leave this zone (Boletín Oficial del Estado 2008).
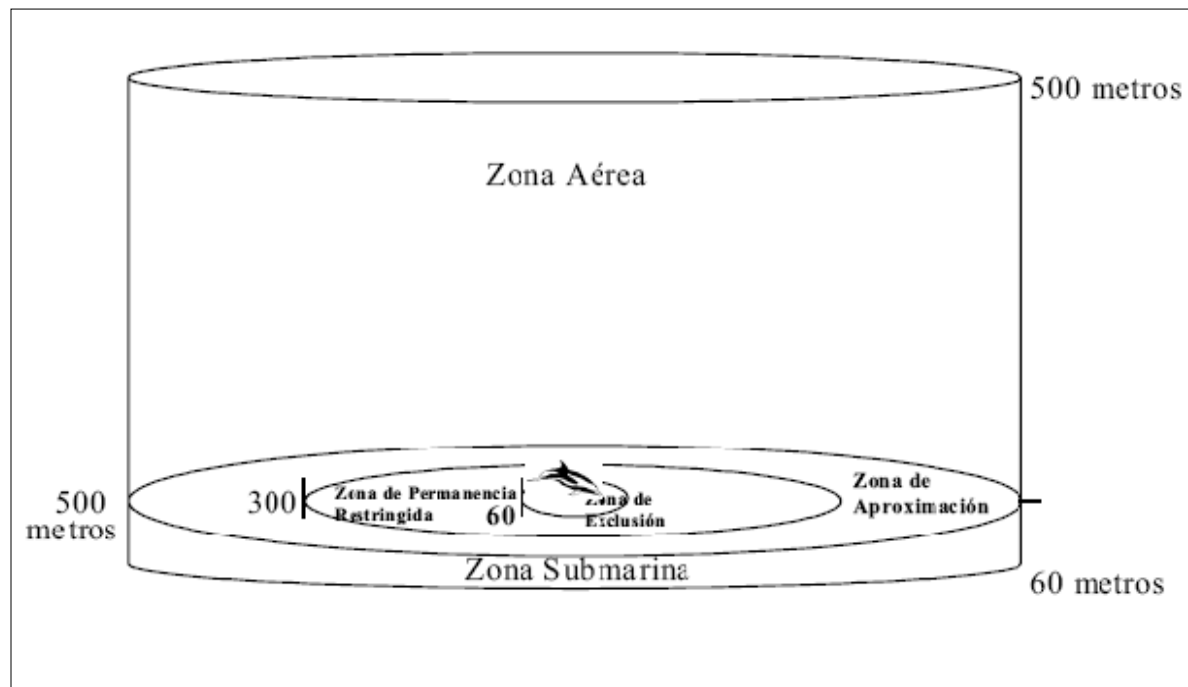

Figure 21: Mobile Area for the Protection of Cetaceans (Boletin Oficial de Estado 2008)

On top of that are an aerial zone and submarine area defined which do not have any effects on whale watching activities as practiced on Tenerife. Certain standards must be applied to within the whole "Mobile Area for the Protection of Cetaceans", which is comprised of all of the zones described above. These standards include vessels moving at a constant speed of no more than four knots, an approach of cetaceans at an angle of 30° (see Figure 3) as well as the prohibition of the use of sonar systems and acoustic noise.

Infringements to the decree will be penalized through Law 42/2007 of 13 December (Boletín Oficial del Estado 2008).

Law 14/2009 "Ley 14/2009, de 30 de diciembre por la que se modifica la Ley 7/1995, de 6 abril, de Ordenación del Turismo de Canarias" which manages tourism on the Canary Islands. It was developed by the Tourism Administration of the Canary Islands Government. In this law, general rules concerning tourism on the Canary archipelago are defined including registrations of tourism organisations, standards to be met and fines and other penalties for infringements. The law also mentions that special attention has to be given to tourism related activities that
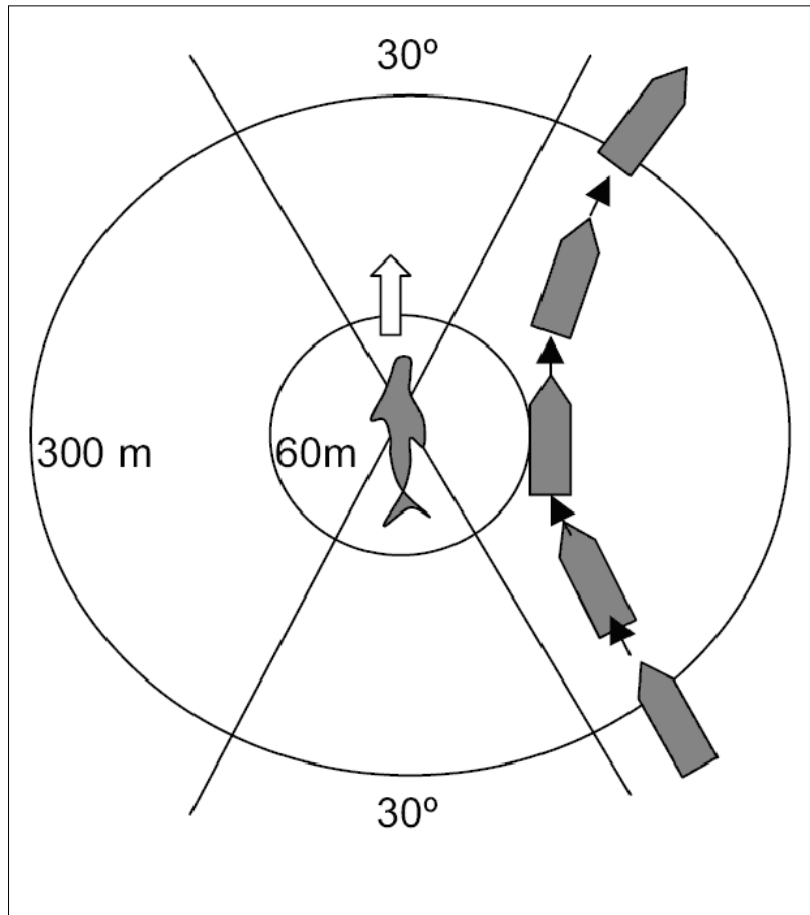
Figure 22: Approaching Cetaceans (Boletin Oficial de Estado 2008)

might affect natural protected areas or protected animal species but states that the protection of these is safeguarded by other legislation and therefore not given special attention in Law 14/2009. The rules of this law are therefore important for the tour operators of whale watching to adhere to but are not relevant to this project as they do not incorporate any environmental standards (Boletín Oficial de Canarias No 2 2010).

Appendix H Example of a Marketing Plan for Accredited Boats based on Freebird One

This Appendix will give an insight into how the accreditation could be used in the marketing of the whale watching boats, based on Freebird One as an example. Firstly, the company's micro- and macroenvironment will be described briefly. Secondly, an explanation will be given on how the accreditation can be used in the whale watching operator's positioning as a competitive advantage. Thirdly, an overview of how the accreditation can be implemented into Freebird One's marketing mix is given.

Environmental Analysis

Microenvironment

The microenvironment consists of Freebird One itself, its customers, intermediaries and suppliers.

A description of the Freebird One organisation can be found in Chapter 3.2.

An insight into Freebird One's customers in March and April 2011 was given through the survey. On top of that does Freebird One offer private charters on both its boats.

The organisation works with different intermediaries, namely tour operators, cruise ships and independent sales people. Further information on these is given in Chapter 5.3.

Freebird One also uses suppliers, e.g. for the food provided on board the vessels. If taking part in the accreditation, Buena Proa would become a further supplier in Freebird One's microenvironment, supplying education material, training and promotion.

Macroenvironment

Freebird One's macroenvironment consists of competitors as well as other individuals and organisations in their geographical and thematic surroundings.

The whale watching industry of Tenerife is comprised of tough competition, with many whale watching operators offering similar trips. On top of the direct competition consisting of other whale watching operators, there is also indirect competition consisting of all activities offered in south west Tenerife.

Around 30 boats offer whale watching tours from Tenerife's ports in Puerto Colon, Los Cristianos, Los Gigantes and Las Galletas, with most trips including the Freebird One and One For You leaving from Puerto Colon. Those boats offering a similar product and working with the same intermediaries are Freebird One's closest competitors.

In a larger context, the whole local society and economy belongs to Freebird One's macroenvironment, including hotels that accommodate the whale watching tourists, media that might occasionally write articles about whale watching and taxi drivers that bring the tourists to the port.

Market Segmentation and Positioning

Market Segmentation
In order to develop an effective marketing mix, Freebird One has to look at different market segments and decide which of those segments to target.

Figure 23: Market Segmentation and Positioning (Kotler, 2005)

The first step in this is market segmentation which Kotler (2005) defines as "Dividing a market into distinct groups of buyers with different needs, characteristics or behaviour, who might require separate products or marketing mixes" (p 293). Secondly, market targeting has to be conducted which is the "process of evaluating each market segment's attractiveness and selecting one or more segments to enter" (Kotler, 2005 p.391).

Currently, Freebird One is targeting different groups of tourists with the different tours they offer. Examples include the Freebird One Family Cruise for families with younger children; the TUI Germany eco tour for German tourists wanting more detailed, German explanations during the tour and the luxurious Thomson VIP tour on which a maximum of 55 passengers are allowed and children are excluded. The survey has shown that the level of importance given to the accreditation factors by the different targeted groups does not vary strongly and all groups currently targeted by Freebird One value the factors and are generally willing to pay the Euro.

The survey has also shown that the different demographic groups do not vary strongly in how important they find the accreditation factors It is therefore recommended that Freebird One does not change its market segmentation and market targeting concerning demographic and geographic segmentation but include the new product features in its positioning for all targeted markets. This means that Freebird One maintains the different tours currently offered but communicates to all groups the new accreditation.

Freebird One should also include behavioural segmentation by targeting a tourist group that seeks certain benefits in a product. In this case that means that the tourists wanting an environmentally responsible whale watching experience are targeted.

According to the survey, the majority of different demographic and geographic groups find the accreditation factors important and fall into the new behavioural segmentation group.

For this group of tourists, the accreditation will add value to the product and the tourists will therefore be attracted to Freebird One rather than to its competitors that are not taking part in the accreditation.

A multivariate segmentation in which markets are segmented by one or more demographic characteristics seems inappropriate in this case due to the limited amount of possible

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consumers that come to the island and want to take part in whale watching as well as the large amount of competitors.

Market Positioning
After having identified the types of tourists Freebird One wants to target, a market positioning strategy has to be developed. Market positioning means "Arranging for a product to occupy a clear, distinctive and desirable place relative to competing products in the minds of target consumers. Formulating competitive positioning for a product and a detailed marketing mix" (Kotler 2005 p.391).

In order to develop an efficient market positioning, Freebird One has to select those competitive advantages that are relevant to its target groups. The company's new position should also clearly distinguish Freebird One from other competitors. Especially the closest competitors, offering a similar product and working with the same intermediaries have to be taken into account for this.

Currently, Freebird One positions itself as a rather luxurious tour but does not stand out in many other ways from its competitors. The accreditation can change this, giving the company a stronger competitive advantage through positioning itself as "THE environmentally responsible whale watching boat". This competitive advantage has to be communicated and supported through the 4 Ps of the marketing mix: product, promotion, price and place (see Chapter 5.3).

One other whale watching boat has got a similar strategy, promoting itself as "The ecological boat" due to the engine being further inside the boat, not playing music and being a registered whale watching boat with the "Barco Azul". However, this boat leaves from the port in Los Cristianos which is around 7 km away from Puerto Colon, where the Freebird One tours leave. Also is this competitor much smaller and not working together with the tour operators and tour sellers on the street near Puerto Colon.

Freebird One can differentiate itself from its competitors by communicating the implemented accreditation including the new physical attributes (educational material), services (better information provided by trained nature guides) and image.

It is assumed that this competitive advantage will be successful and effective as it fulfills most of the criteria being named by Kotler (2005(2)): it is important to the consumer and offers a benefit, it is distinctive, it is superior, communicable, affordable by the consumers and profitable for the company. However, there is one issue with selecting the accreditation as Freebird One's competitive advantage: it is not a preemptive attribute, during the next years it can be assumed that more boats will follow their lead. Freebird One will then have to either keep using the accreditation and communicate having been the first boat to be accredited, or look for new competitive advantages to position itself in this highly competitive environment.

The Marketing Mix

Introduction

Unlike in most whale watching destinations worldwide, whale watching in the Canary Islands has seen decreasing tourist numbers between 1998 and 2008 with numbers dropping from 1,000,000 visitors in 1998 to 611,000 visitors in 2008. The number of operators increased during this period from 25 operators in 1998 to 29 operators in 2008 (International Fund for Animal Welfare, 2009)[6].

The whale watching industry can therefore be described as being in the maturity phase of the product life cycle. This phase is characterised by factors such as peak sales, low costs per customer, a stable but declining number of competitors (Kotler 2005 p. 613).

In this phase, Kotler (2005) recommends to diversify the brand and models, use a price similar to that of competitors, extend the distribution systems, increase sales promotion and communicate brand differences and benefits. The following chapters will explain how Freebird One can adapt these strategies and integrated the accreditation into its marketing mix.

Product Strategy

Currently, Freebird One is offering different whale watching tours for different target groups as explained in Chapter 5.1. All trips include transport by coach, the whale watching trip itself, food and drinks which are included and a guide providing information on the tour and animals seen.

The general outline of the tours as it is today could be supplemented with the accreditation factors which will lead to a more environmentally responsible tour and have benefits for the tourists.

The new features can be translated from the contract between Buena Proa and the boats:

Buena Proa ONG will provide the whale watching operators with educational material as well as seminars in which tour guides concerning different aspects of whale watching. The guides of whale watching tours have to attend the seminar and make use of the educational materials on board. This will improve the chances of a whale watching tour sparking the tourists' interest for the biodiversity of the Canary Islands and improve the awareness for the protection of cetacean populations through offering more in-depth and interesting information on cetaceans.

Buena Proa ONG will develop and provide educational material about the whales while the boat operators will make use of the material and tour guides on the trips will give a talk about the whales that can be observed from Tenerife on all tours. According to Buena Proa ONG, environmental education on board is important for an "understanding and greater enjoyment of the passengers on board, as well as their involvement in environmental conservation" (translated from Buena Proa ONG 2011). A

All vessels will take part in research by collecting data of all sightings of cetaceans and hand the data over to Buena Proa ONG to be analysed. The research is "considered an essential point

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[6]Part of the decrease in tourist numbers is possibly due to stricter regulations in 2008, limiting the number of whale watching boats, as well as an exceptionally good season in 1998 concerning weather conditions with only very few days in which whale watching was not possible due to bad weather(International Fund for Animal Welfare, 2009).

both for the status of the animals and to ensure sustainable development and business continuity" (translated from Buena Proa ONG 2011).

The vessels will develop "Good Practices" on board, including specific rules for approaching cetaceans, recycling, assisting stranded or injured animals and the reduction of noise.

All vessels agree to comply with current legislation at all times (currently most importantly for whale watching: Decree 1727/2007 and Decree 178/2000.

This means that a few features will be added to the product. Firstly, physical attributes in the form of recycling and educational material which will be available for all tourists will be improved.

Secondly, the service will be improved by staff being trained in providing more detailed information on cetaceans and nature off the south-west coast of Tenerife.

Thirdly, the augmented product will be improved by the tourists experiencing research for the conservation of cetaceans and learning about the Good Practice of whale watching.

On top of these factors will the image of the trip improve, which also plays a role in some consumers' satisfaction due to sensitivity concerning their own image and the image of products they use.

Freebird One could keep its current branding due to cost factors and being a successful company renown for quality whale watching tours.

Price Strategy

Currently, Freebird One has several different tours that different ticket prices are charged for.

Standard 3-hour tours: €47
Basic 3-hour tours with a smaller lunch: €41
Standard 4.5-hour tour: €54
Thomson VIP tours: €112

Prices vary between different distribution channels due to different commissions and contracts. Freebird One's prices are similar to those of comparable competitors' ticket prices.

Taking part in the accreditation means that Freebird One has to pay €1 per passenger taking part in the tour to Buena Proa. This Euro will be used to cover the costs involved in implementing and sustain the accreditation factors. Those costs include

⚞ training for tour guides
⚞ developing and printing education materials
⚞ wages for undertaking research for the conservation of cetaceans

As these costs have to be covered by Buena Proa, €1 per whale watching tourist has to be given to the NGO. The survey conducted on the Freebird One in March and April 2011 showed that a vast majority of the tourists is willing to pay the Euro if they will get the benefits of the accreditation in exchange. This means that Freebird One can add one Euro to the current ticket price for all tours and all distribution channels.

It should be clearly stated on the ticket that one Euro of the price paid will be used for the accreditation factors.

Furthermore Freebird One will have to develop a recycling system which involves certain implementation costs not covered by the Euro.

Promotion and Communication Strategy

In order to develop an effective promotion and communication strategy, Freebird One has to focus on its target group and the objectives wished to be reached by promoting and communicating their product.

In Tenerife's whale watching industry, where intermediaries play such an important role in buyer-decision-making, the focus should be on targeting intermediaries. This is called push strategy, defined by Kotler (2005) as a "promotion strategy that calls for using the sales force and trade promotion to push the product through channels. The producer promotes the product to wholesalers, the wholesalers promote to retailers, and the retailers promote to consumers" (Kotler, 2005). For Freebird One, this means promoting the product to the intermediaries such as tour operators and tour sales offices, who then promote the product to the consumers, the whale watching tourists. However, a large proportion of the promotional material used by the intermediaries is developed by the boat operators.

Some communication should also be conducted directly to the customers to firstly directly sell tickets without intermediaries in between and secondly attract their attention which might lead to demand for the Freebird One whale watching tours. This is called pull strategy and can be defined as a "promotion strategy that calls for spending a lot on advertising and consumer promotion to build up consumer demand" (Kotler, 2005). Figure XXX shows a concept of this marketing communication system.
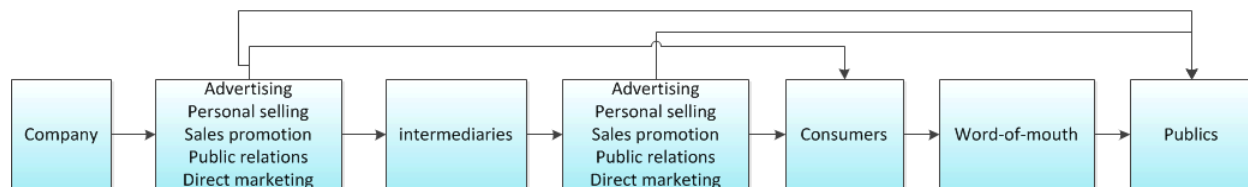
Figure 24: The Promotion System (Kotler, 2005)

The promotion mix used should be consistent, communicating the same message through the various communication channels. A combination of several promotion tools, including advertising, sales promotion, public relations and personal selling is recommended to reach the different target groups.

The focus of all promotion conducted by Freebird should be on communicating the accreditation and the benefits for environment and whale watching tourists that come with it. Freebird One's existing image of the luxurious catamaran should also be kept and further communicated.

Advertising

Advertising can be defined as "Any paid form of non-personal presentation and promotion of ideas, goods or services by an identified sponsor" (Kotler, 2005). It is a very valuable tool in raising awareness of a product in a large number of people simultaneously.

Freebird One's main objective for advertising is to inform the tourists generally about the different whale watching tours they offer and more specifically about the accreditation and the new features coming with it. Most tourists that participated in the survey were on a whale watching tour for the first time, indicating that there is not much repeat behaviour. Due to the holiday setting, most people are not aware of the different whale watching tours offered on Tenerife, which means that advertising has to combine several functions (informative advertising and persuasive advertising) in a short period of time, leading the consumers through the stages "unawareness – awareness – comprehension of the offer – conviction – action or inaction" (Cooper 2004) in order to successfully sell a ticket for a whale watching tour. For Tenerife whale watching, advertising is strongly used to lead through all these stages, mainly in form of flyers that can be found in tour selling offices, in hotels and other places frequently visited by tourists.

Freebird One could develop new advertising material focusing on the accreditation and thereby communicating its market position and competitive advantage. Especially the factors that the survey indicated were most important to the people should be emphasized. These are a trained nature guide providing information, research for the conservation of cetaceans being conducted on board and the boat complying to the rules for approaching cetaceans. As all age groups, genders and nationalities found these aspects important, no distinction should be made between different groups. As advertising tools, flyers and posters should be used to reach the tourists at the destination. E-Marketing, using both social networks and the Freebird One homepageis very cost-effective tool to reach tourists that search for information online before coming to Tenerife.

Advertising is a useful tool in reaching a large amount of people simultaneously and therefore should be used to target consumers. However, for the contact with intermediaries, who are also customers of Freebird One, a more personal technique is recommended in which communication is two-sided and long-term business relationships can be developed. Intermediaries should therefore be targeted through personal selling rather than advertising.

Sales promotion

"Sales promotion involves any activity that offers an incentive to induce a desired result from potential customers, trade intermediaries or the sales force." (Cooper 2004).

One incentive used in sales promotion could be a Euro-back guarantee during the introduction phase of the accreditation. If people feel that the accreditation factors were not worth the Euro after having taken part in the whale watching tour, they can ask to get their Euro back. This way, the tourists are given a choice whether they do or do not want to pay for it. It also puts a stronger focus on the accreditation and what it means for the whale watching tour in comparison to competitors' tours.

Another sales promotion is to start up a sales contest in which all tour guides of tour operators as well as the sellers in tour selling offices are invited. The individual selling the most Freebird One tickets wins a prize, whereby most intermediaries would generally be motivated to sell the Freebird One tours.

Even though sales promotion can be effective, the effects are short-lived (Kotler 2005 p. 743) and sales promotion should therefore only be seen as a support and supplement (Kotler 2005(2) p. 667) for other promotion tools and not be used without using any other tools.

Public Relations

Kotler (2005) defines public relations as "Building good relations with the company's various publics by obtaining favourable publicity, building up a good 'corporate image' and heading off unfavourable rumours, stories and events" (Kotler 2005 p. 719).

The implementation of the accreditation is an event that can very well be used for public relations. Freebird One, in cooperation with Buena Proa, can contact various newspapers and magazines and ask if they were interested in writing an article about the Wa(h)l-Heimat project. This would mean free promotion for Freebird One as they would be mentioned in articles for being the first boat to have implemented the accreditation. The types of media contacted can be a combination of local newspapers (including those written for international tourists) as well as international travelling magazines and newspapers. Also online media can be useful in spreading the word of the accreditation and with it the new features of the Freebird One whale watching tours.

One of the aspects of the accreditation in the contract between Buena Proa and the whale watching boats stated that Buena Proa will communicate the accredited vessels publicly in different media channels which can be seen as promotion for the vessels participating in the Wa(h)l-Heimat project. Buena Proa will also cite the sources of all scientific material published and name all vessels participating in the research program (Translated from Buena Proa ONG 2011).

On top of that can Freebird One also use its existing pages in social media to inform people about the new features of their tour and the Wa(h)l-Heimat project.

Another public relations tool recommended is an event, inviting all intermediaries and media to a party, celebrating the implementation of the accreditation. This will obtain a lot of attention from intermediaries and might also help to spread the word of the accreditation through local media.

Freebird One should also try to be named by travel guides which are read by many tourists. Being mentioned in a travel guide can be a huge advantage and help attract tourists. More and more travel guides feature a sustainable tourism section or mention sustainable organisations rather than others. Being positioned as "the environmentally responsible whale watching boat", Freebird One should try to be mentioned in as many printed and online travel guides as possible.

All of the tool mentioned above are relatively cost-effective tools to inform Freebird One's environment about the accreditation and to promote Freebird One's image as an environmentally responsible whale watching operator.

Personal Selling
Personal selling can be defined as an "Oral presentation in a conservation with one or more prospective purchasers for the purpose of making sales" (Kotler, 2005(2)).

For Freebird One, personal selling is a tool that should be used mainly for intermediaries due to the consumers usually not returning in whale watching tourism and therefore no relationship being built. It also involves relatively large costs and is therefore more efficient for longer business relationships.

As there are many different whale watching boats, with most intermediaries selling tours of several different companies, it is important to convince the intermediaries of the advantages the accredited tours have for the tourists. A good opportunity to convince the intermediaries of these benefits is to invite them on a free Freebird One cruise in which they can experience the features themselves. This way, the intermediaries could be convinced to promote and sell Freebird One tours rather than tours of other whale watching boats as they know the tour well and have experienced the quality of the product first hand.

Freebird One should also send a sales expert to arrange personal meetings with the intermediaries in which the new features, the accreditation and the benefits for the tourists, including the survey results, are communicated. It is important that this sales expert is convinced of the benefits of the new positioning and a very good and convincing communicator.

Place/Distribution Strategy

Freebird One is using different distribution channels to sell tickets for their whale watching tours. Firstly, they sell tickets directly to consumers via their office at the port and their homepage. Some tourists that took part in the questionnaire also booked their ticket on a cruise ship and others bought it from independent sales people which can be found very frequently on Tenerife. However, most of the ticket purchase seems to take place through tour operators as this was the purchase method mentioned by most tourists in the questionnaire. The tourists booking their Tenerife holidays with a tour operator are usually invited to a welcome meeting in which the tour operator provides information and the tourists can purchase tickets to different activities, one of them being the Freebird One whale watching tours. Appendix H gives an overview of the tour operators Freebird One and other boats are working with. In order to get as many consumers as possible to choose Freebird One, the whale watching operator should try to work with as many tour operators as possible. The fact that Freebird One will be "The environmentally responsible whale watching boat" might mean new chances to working with tour operators Freebird One has not been working before due to the tour having an advantage to others. Environmentally responsible tourism is getting more and more important and most tour operators want to have an image that shows their "green side".

Appendix I Table giving an indication of which boats work with which tour operators

Table 81: Overview of which Boats Work with Which Tour Operators

Tour Opertor	Black Jack	Diamant	Freebird One/14U	Flipper Uno	Jolly Roger	Lady Shelley	Lina	Mustcat	Neptuno	Peter Pan	Royal Delfin	Sea Quest Sailing	Shogun	Submarine Safaris	World of Tui
1 2 Fly									X		X	X		X	
Airtours/monarch.co.uk			X												
AlfaStar								X					X		
Alltours				X										X	
Alltours				X										X	
Apollo								X			X			X	
Canaria Travel				X		X		X						X	
Ferien- Reisen die wir lieben				X				X			X				
First Choice			X												
Fischer (Cestovni Kancelar)				X		X					X			X	
FTI			X	X							X		X	X	
Franco Rosso						X					X			X	
Gulet Touristik											X		X	X	X
Helvetic Tours						X									
Horizontes/Mundi Color														X	
Hotelplan									X	X	X		X	X	
ITS/Jahn/Tjaereborg			X			X			X			X	X	X	
Ltur											X	X		X	
Luxair Tours											X				
Natalie Tours					X		X		X						
Neckermann			X			X								X	
Neckermann			X											X	
Neckermann			X											X	
Novatours.lt							X								
Orizonia Corparacion	X		X			X								X	
Scan Holiday			X											X	

	1	2	3 (yellow)	4	5	6	7	8	9	10	11	12	13	14
Schauinsland				X				X			X			X
Soltour				X		X								X
Spies			X								X			X
Sumar Ferdir.is										X				X
Sunjets.be											X			X
TerramarTour						X								X
Teztour.com											X			
Tjäreborg.fi			X								X			X
Thomas Cook			X											X
Thomas Cook			X											X
Thomson											X			
Travelplan														X
TUI Jetair											X			X
Urval Utsyn										X				X
Veratour										X				X
Viajes Artur		X				X		X		X		X	X	X
Viajes El Corte Ingles						X					X			
Ving			X								X			X
Ving			X								X			X
VKO Travel								X	X					X
YouTravel.com								X						X
ZON			X	X		X								X