The perceived impacts of all-inclusive package holidays on host destinations

A Consumer Survey
Introduction:

This report presents the findings of a recent Tourism Concern survey which investigated the perceived impacts of all-inclusive package holidays. It is the latest publication relating to Tourism Concern’s ongoing critique of the all-inclusive model, and follows our 2014 report: ‘The impacts of all-inclusive hotels on working conditions and labour rights’, and the 2012 briefing: ‘All-inclusive holidays – excluding local people in tourist destinations’.

The survey was carried out between 2012 and 2014 with the support of Emedia, an online market research platform based in the UK with a membership of over 500,000 holiday makers. Almost 1,750 responses were received.

This report presents the survey findings together with an analysis of important themes emerging from our broader investigation, including the economic exclusion of local communities; local sourcing; export leakages; the labour rights of hotel workers; environmental degradation and land displacement; and the effect of the model on cultural interaction.

We are publishing the findings and associated recommendations in order to generate greater awareness of the extent to which the all-inclusive model can adversely affect local communities. In turn we hope that this will encourage both holiday makers and tour operators to seek improved models of tourism which offer greater benefits to local destinations and reduce the negative impacts of the all-inclusive approach.

Key findings:

1. 55% of survey participants believe the shift towards all-inclusive holidays is a negative development. Nonetheless, 42% of the survey sample are likely to go on an all-inclusive holiday in the next two years.

2. Of those survey participants who have been on an all-inclusive holiday, 32.8% never left the resort to visit a local restaurant, and 34.47% never went on an excursion outside the resort.

3. 87% of the sample believe that tourists benefit from all-inclusive holidays. At the same time, 65.25% responded that local communities are in some way made worse off by the establishment of all-inclusive resorts.

4. There is an interesting distinction between the values of those who have been on an all-inclusive holiday and those that have not. Of the former, 23.86% rated environmental issues ‘very important’, and 23.96% rated ethical considerations ‘very important’. By contrast, 39% of those that had never been on an all-inclusive holiday rated environmental issues as ‘very important’, and 41.14% rated ethical considerations ‘very important’.
Background

The state of global tourism

According to the 2013 United Nations World Tourism Organisation (UNWTO) World Tourism Barometer ‘international tourist arrivals grew by 5% in 2013, reaching a record 1,087 million’. This represented an increase of 52 million international tourist arrivals, significantly exceeding expectations for 2013. The UNWTO forecasted further growth for international tourism in 2014, predicting 4% annual growth [1].

These figures illustrate the huge size of the global tourism sector, with more people than ever before travelling abroad. Consequently, the importance of promoting sustainable and ethical tourism is greater than ever too.

In a bid to encourage good practice, the UNWTO general assembly adopted a ‘global code of ethics for tourism’ in 1999 which aimed to ‘promote responsible, sustainable and universally accessible tourism.’ Tourism Concern and its European and global partners were involved in drawing up the code’s ten articles (see Table 1 opposite).

The potential benefits of international tourism to both travellers and host communities are wide-ranging.

Host communities can benefit from tourism employment – a particular benefit for those with otherwise limited access to the labour market, such as women, younger people and people from rural areas. Tourism can also be an economic stimulus to local business and the wider economy, helping to raise the general standard of living [3].

Tourists choose to travel for a variety of reasons including for leisure, business, culture, religious interests or health – enjoying and learning about a destination’s climate, heritage, language, food, people and natural environment.

The places where people choose to stay form an interface between tourists and the local community [4] – a place where the mutual benefits of tourism might be expected to emerge. In the past visitors were portrayed as coming to this space to admire – not consume – the landscapes, customs, and cultural assets of the destination. However, the evolution of mass tourism has led to a less benign reality, with increased competition for scarce resources and heightened pressure on the local environment and infrastructure, generating numerous negative environmental and social impacts.

Whilst efforts have been made to encourage and implement ethical and sustainable tourism, some models are more wide reaching and beneficial than others. Tourism Concern supports tourism that enriches visitors’ experiences whilst simultaneously supporting local communities in a way which is sustainable in the long term.

The expansion and globalisation of the tourism market offers tourists a huge range of international destinations and modes of travel to choose from. Increased competition between tour operators has also led to a significant reduction in travel costs and enabled people with lower budgets to also access travel. Popular package holidays provided by travel agents and tour operators offer an often low cost combination of flights, transfers, accommodation, food, beverages & activities. Holiday packages range from Bed & Breakfast (breakfast plus accommodation), half-board packages (accommodation with two meals), full-board packages (accommodation with three meals), and all-inclusive packages (accommodation with all food and beverages provided).

The all-inclusive share of the UK market grew by 25% between 2008 and 2013, a figure which, according to market research organisation Mintel, will continue to grow [3] for the foreseeable future. There is clearly a significant market demand for all-inclusive holidays.

Although at face-value the all-inclusive holiday may appear largely attractive to tourists, for over twenty years Tourism Concern has argued that there are also significant detrimental impacts which need addressing if it is to benefit hosts communities as well. These impacts are discussed next.

Table 1: The UNWTO Global Code of Ethics Articles

<table>
<thead>
<tr>
<th>Article</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Tourism’s contribution to mutual understanding and respect between peoples and society.</td>
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<tr>
<td>2</td>
<td>Tourism as a vehicle for individual and collective fulfilment</td>
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<td>3</td>
<td>Tourism, a factor of sustainable development</td>
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<td>4</td>
<td>Tourism, a user of the cultural heritage of mankind and a contributor to its enhancement</td>
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<td>5</td>
<td>Tourism, a beneficial activity for host countries and communities</td>
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<td>6</td>
<td>Obligations of stakeholders in tourism development</td>
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<td>7</td>
<td>Right to tourism</td>
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<td>Liberty of tourist movement</td>
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<td>9</td>
<td>Rights of the workers and entrepreneurs in the tourism industry</td>
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<td>10</td>
<td>Implementation of the principles of the global code of ethics for tourism</td>
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## Background

### All-inclusive holiday packages

French company Club Med created what may be seen as the first all-inclusive holiday. Initially an elite product, the model evolved and gained momentum, attracting millions of holiday makers worldwide [3]. With greater demand for cheaper and ‘easier’ holidays, more and more hotels and tour operators have embraced the model [6].

The attraction of the all-inclusive holiday is based on value for money and delivery on a fixed budget, where tourists pay up front and are encouraged to ‘leave their wallet at home’ [6]. Such packages provide guests with flights, transfers, accommodation, activities, kids’ clubs, and unlimited food and beverages. Tourists can mitigate the risk of a ‘holiday budget blowout’, while tour operators and resorts can increase their efficiency, partly due to improved predictability of demand [3].

While all-inclusive hotels clearly do provide convenience and value for money, for tourists there are a number of downside too. A 2014 study at Balikersir University in Turkey found that less than a tenth of respondents thought the food and beverages offered in all-inclusive hotels were healthier than those consumed in their daily lives. Meanwhile 78% of respondents admitted that they usually put on weight on an all-inclusive holiday [7]. Other research has suggested that because it has been paid for in advance, and hotels are keen to keep costs low, food in all-inclusive resorts may be of poorer quality than in conventional hotels.

Ultimately, though, it is a question of choice as to whether any particular holiday maker chooses an all-inclusive. On the other side of the equation – the impacts on the destination – the benefits are more questionable and the detrimental effects of far more concern, and there is little choice for those on whom this tourism model impacts. The fifth article in the UNWTO code of ethics for tourism states the importance of ‘tourism benefiting and supporting host communities’ (See Table 2, opposite). Tourism Concern questions whether the all-inclusive model achieves this.

### Economic Impact Issues

#### Economic Exclusion:

The all-inclusive model means that the resort (or hotel) effectively creates a ‘tourism monoculture’ sometimes referred to as ‘enclave tourism’ [6]. Tourists are provided with most of their requirements within the resort and therefore have little incentive to venture outside. There is hence far less motivation to take part in conventional tourism activities such as eating and drinking in local restaurants and bars, or going on local tours and paying entry fees to see local natural or cultural heritage [9].

Clearly if guests stay inside their resort, there is likely to be a measure of local economic exclusion. They are also likely to only take part in tourism activities which are recommended/provided by the resort – creating an unbalanced power relationship between the multinationals and local tourism providers [6].

#### Export leakage and the role of multinationals:

At national, regional and local levels, governments in countries with a high dependency on tourism work hard to encourage tourists to their country. In many cases they enter into formal agreements with the multinational tour operators, airlines and hotel developers. These multinationals often invest in the construction of tourism infrastructure and facilities, for example. However, this results in ‘export leakages’ later in the process, when those investors take their profits back to their country of origin [10]. Equally, multinational companies and tourism developers may request that the destination government improves infrastructure (such as roads and airports) which can be a costly burden on a developing country [10].

#### Import leakage and the trickle-down effect:

In theory tourists staying in a particular destination and spending money should have a beneficial effect on local businesses. However, according to the United Nations Environment Program (UNEP) ‘in most all-inclusive package tours, about 80% of travellers’ expenditure goes to the airlines, hotels and other international companies (who often have their headquarters in the travellers’ home countries), and not to local businesses or workers’ [10]. This even includes importing foods and other supplies from elsewhere. With such leakages, all-inclusive holidays have a significantly reduced trickle-down effect on local economies [6].

This need not be the case, however, and ‘all-inclusive resorts could significantly increase the amount of money which reaches local hands by supporting local farmers and buying food and produce locally’ [9].

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“Going on all-inclusive holidays you feel that you have to get your money’s worth out of the holiday and you eat more than normal because of it.”

**Survey Respondent, 2014**
The all-inclusive model:
Less developed countries seeking expansion of tourism as a means of economic development clearly have an urgent need for income, employment and a general rise in their the standard of living. However they are also least able to realise these benefits [10], as ‘a high dependency on tourism means power relations between local entrepreneurs and residents and international tour operators are hugely unequal.’ [6].

According to UNEP, a recent study found that ‘all-inclusive hotels generate the largest amount of revenue but their impact on the economy is smaller per dollar of revenue than other accommodation sub sectors.’ Tour operators and resorts do have the ability to play a key role in supporting the local economy by minimising import leakage & supporting the existing local tourism sector [10]. The question is how to encourage them to do so.

The power struggle between multinational tour operators and the existing local tourism sector is inevitably unequal. The multinationals are the big winners as they pocket the majority of the profits, while local communities lose out financially. This also impacts on the social dynamics between tourist and locals.

How does this power imbalance affect the long term prospects of host communities? UNEP defines sustainable tourism as tourism activities that can be maintained indefinitely in their social, economic, cultural and environmental contexts [11]. But there are many examples in recent years where multinationals have withdrawn from certain destinations when other less developed places are seen as more attractive. Will they preserve and protect the environmental and cultural assets of the destination that drew them there in the first place?

Social & Cultural Impact Issues

Labour rights and working conditions:
Previous research by Tourism Concern [3] revealed that staff in all types of hotels are faced with low wages and a variety of unfavourable working conditions. The research also found that ‘workers in all-inclusive hotels face even less favourable working conditions than regular hotels’. It was found that staff were commonly offered short-term contracts that meant fewer benefits, less training and less job security. Further issues included seasonal employment, long working hours and unequal opportunities. Staff received fewer tips in an all-inclusive resort, perhaps because guests believe they have already paid for everything (including immediate and constant service).

The researchers concluded that, while all-inclusive resorts do create new jobs for local people, it is ultimately
Background

the responsibility of the tour operators and resort owners to adhere to the directive of the International Labour Organization (ILO) to promote ‘decent work’ and ‘labour rights’ [3]. Internal resort policies towards employing qualified local people, providing ongoing training, fair wages and decent working conditions should, said the report, be the objective of a modern, socially responsible resort.

Safety and Trust
In many cases tourists choose an all-inclusive holiday for their own ease of mind. They may have safety concerns about the local area, for example, or perhaps are intimidated by language barriers. By choosing all-inclusive travel packages, tourists know they are in safe hands whilst also expecting a quality product for a manageable price [6]. However, this can be used to the hotels’ advantage. In some cases tourists are warned by their hotel or tour operator about the safety of the local area, and are advised not to venture out [9]. Instead of taking a proactive approach and encouraging cultural exchange, they are further widening the gap between locals and tourists and hampering positive cultural exchange. As more of a divide occurs, local people's attitudes towards tourists may become ever more negative.

Cultural exchanges & tourist experiences
International travel should facilitate new experiences and cultural exchange. Guests should have the opportunity to explore new places, sample local food, learn about local languages and customs, meet local people, and visit unique landmarks and natural heritage sights. However, the all-inclusive model can effectively alienate tourists from the destination they are visiting and the people who live there. Tourism Concern believes hotels and resorts should pro-actively support the local economy, for example by providing free shuttle buses from a resort to the local town, or ensuring their guests have accessible information on the local area.

Local discontent
Competition, both between local tour operators and between hotels, has become increasingly intense as the all-inclusive market has expanded. In order to secure deals with multinational tour operators, margins are driven down throughout the supply chain. Hotels can end up being paid very little for each room by the tour operator, leaving them with little to pay their staff [3]. Tourism Concern has received many reports conveying anger, frustration and distress from local hotels who have had to succumb to pressure from multinational tour operators to transform their hotels into all-inclusives [6].

Environmental Impact Issues
Tourism has a number of detrimental environmental impacts on local destinations. These are often felt most greatly by local communities – people who may accrue little economic benefit from that tourism, particularly where the all-inclusive model limits local economic linkages.

• The construction of tourism infrastructure (such as resorts, roads, airports, jetties) can impact on natural assets. Building on beaches, in forests and along rivers can result in displacement of communities and wildlife.

• A lack of planning and zoning can result in the destruction of sensitive ecosystems such as coastal dunes, mangroves and tropical rainforests.

• Increased tourism can place greater pressure on the existing local infrastructure, resulting in increased traffic and decreased air quality.

• As evidenced in Tourism Concern’s report Water Equity and Tourism (2012), increased tourism can place greater pressure on both natural resources such as the supply of clean water, and on local energy supply, waste disposal and wastewater treatment [16].

• Seasonal tourism can place significant stress on the local environment over a short time frame, eroding and littering beaches and waterways.

The all-inclusive model:
• With guests spending significantly more time within the resort, the all-inclusive model typically means high energy consumption on such things as space heating or cooling, hot water generation and lighting [13].

• Water use by guests can be as much as sixteen times greater than by local people, and its disposal creates significant amounts of waste. Sewage treatment also places a great deal of pressure on local infrastructure.

• The ‘all you can eat and drink’ approach in all-inclusives inevitably results in significant food waste. Buffets are available three times a day and, since providers are required to abide by health and safety standards, there is a limited time span before food is disposed of. As local water can vary in quality, ‘bottled water’ is often advised for tourists. Dealing with plastic waste from water bottles alone is a massive problem.

The impact issues raised by the all-inclusive model are now well known by the industry. Encouragingly, our survey results show that holidaymakers are now increasingly aware of them too, and wishing to see them addressed.
Data Collection

Methodology
The survey collected both quantitative and qualitative data. Previous Tourism Concern work on all-inclusives, supported by scoping research, informed the formulation of the survey questions. A total of 15 questions were asked – a mixture of multiple choice and open question formats (see question list right).

The survey was disseminated via Emedia in April 2012. ‘Emedia’ is an online market research platform with a mailing list of over 500,000 UK holiday makers. They have a 25% ‘open’ rate – i.e. 1 in 4 people will be expected to open and view a communication. The Emedia mail list is comprised of ‘general holiday makers’ who have signed up to receive promotional material from Emedia – people who do not have an expressed interest in ethical travel, and who have not necessarily been on an all-inclusive holiday. Tourism Concern achieved a 1.5% response rate from the Emedia mail out, resulting in nearly 1,750 responses to the survey.

Additionally, after the publication of the 2013 Tourism Concern report “The impacts of the all-inclusive hotels on workers conditions and labour rights”, the survey was made available via the Tourism Concern website. This effectively extended the reach of the survey to an international audience.

Purpose
The findings of the survey are intended to:
• help holiday makers to make more informed decisions about their choice of holiday
• provide tour operators with a snapshot of what holiday makers think about the all-inclusive model.

Analysis
Analysis of the survey results included direct interpretation of data, together with comparisons of:
• data from holiday makers that had been on an all-inclusive holiday and those that had not.
• data from those who had experienced an all-inclusive holiday in Europe (particularly the Mediterranean region), and those who had travelled longer distances.
• the opinions of UK and foreign national holiday makers.

Scope of research
A total of 1,741 surveys were completed.

Limitations
There are a number of key limitations that need bearing in mind when interpreting the survey findings. These include:
• data errors due to significant question non-responses.
• answer options that may have been interpreted differently by respondents.
• respondents that may have tried to guess the expected or desired response to a particular question
• respondents that may be unsure about a given answer, but have answered nonetheless.
• relatively few international holiday makers having responded relative to the UK survey participants.

Survey Question List

1. Have you ever been on an all-inclusive holiday?
   - For those who have been on an all-inclusive holiday:

2. Where did you go on your last all-inclusive holiday?

3. Thinking of your last all-inclusive holiday, rate the following:
   - (Value for money, Facilities at the resort, Facilities outside the resort, Local tours, Ability to meet locals, Friendliness of staff, Friendliness of locals).

4. Thinking of your last all-inclusive holiday, how often did you use services not provided in the package?
   - (Restaurants, Cafes, Bars, Excursions, Other.)

5. Who do you think benefits from all-inclusive holidays?
   - (Tourists, Local communities, Tour operators, Workers in Hotel, Local Businesses.)

6. On balance do you think that the move to more all-inclusive holidays is a positive or negative development?

7. Do you think that the all-inclusive model (in places where there are alternatives) can ever benefit local communities?

8. How likely is it that you will go on an all-inclusive holiday in the next two years?

9. When planning your holiday what are the three most important factors that influence your choice of destination and type of holiday?
   - (Cost, Safety, Family friendly, Everything close by, Culture & people, Tourist attractions, Night Life, Warm weather and Beaches)

10. On a scale of 1 to 5, please rate how important the following are to you when choosing your holiday:
    - (Environmental considerations, Ethical considerations, Impact on local communities)

11. What is your gender?

12. Which category below includes your age?

13. Where do you live?

14. Do you work in the travel industry?

15. Please feel free to leave any comments, views or your experiences on all-inclusive holidays.
Views and comments
Participants express their thoughts on the all-inclusive (AI) model

Benefits of all-inclusive holiday model:

Provides safety and assurance in a new/unknown destination:
- “Safety in travel is a concern for me – so I can see why people settle for all-inclusives. But I do not find it acceptable to be cut off from the local community in this way.”
- “All-inclusive holidays are beneficial for single people and people who are not sure about the country/area that they are going to visit and wish to find out more but without the uncertainty within the area.”
- “They are a safe and economical way to experience a country and taste the culture for a first visit. I use AI holidays to get a ‘feel’ for a country before booking another non-AI holiday if I like the area.”
- “…there is a place for all-inclusives, especially in underdeveloped areas where tourists would otherwise not venture, however in well developed geographies they can be harmful with no profit remaining in the country.”

Ideal for family, tour groups, singles and elderly:
- “Single traveller often, so perfect for me as often do not want to wander at night alone.”
- “Sometimes all-inclusive is helpful when no restaurant is nearby, transport is expensive and not safe for lone female traveller.”
- “We always go in a family group of no more than 15 people, and going all-inclusive is great – would do it every year if the prices were a bit cheaper.”
- “When our child was small all-inclusive was a great thing for us as we had very little added outlay cash. Also these hotels seemed to be very child friendly; great swimming pools, kids clubs menus, beach trips etc. However they were self restricting as we tended only to go to local shops to buy our gifts or water for the hotel room. We used local buses to go to attractions cheaply and we did spend on drinks and confectionery on these occasions. As our child got older we went less and less to all-inclusives as our needs had changed and we all agreed we felt a bit ‘hemmed in’ being in the same environment almost all of the time…”
- “My wife and I are in 70’s so it suits us perfectly”
- “I do understand that all-inclusive resorts can have a negative effect on local communities but they solve so many problems with holidays in areas that otherwise would seem not safe for families.”

Value for money and reliable budget:
- “I feel all-inclusives is a holiday where you know your outgoings before you go, extras are able to be bought if extra spending money available.”
- “I think that goods still have to be sourced for the resorts and should be supplied from the area if possible. People also do leave all-inclusive resorts (contrary to popular belief) and visit surrounding areas. Often you feel happier about spending some money because you know you don’t have to when you get back to your hotel.”
- “The cost of Self Catering has rocketed, often all-inclusive in a smaller resort can be cheaper than Self Catering in a large resort. I am on a limited budget and my one real luxury is taking 2 holidays a year. With all-inclusive I don’t need much spending money so much easier to budget.”
- “All-inclusive holidays could encourage more people to visit a destination as cost is known up front. This creates employment for local people, business for local food suppliers. I have always left the hotel on all-inclusive holidays to explore the surroundings, and gone on excursions operated by local companies.”
- “No need to carry money outside of hotel, too many pick pockets about.”
- “We are trying an all-inclusive holiday for the first time shortly and the cost has been a real factor in opting for this…”

Relax, not explore:
- “I go on holiday with my family to relax and have fun. All-inclusives give us the opportunity to eat and drink without financial worry. However, it is obvious from my answers that as tourists we are very selfish, and probably have little consideration for the local environment and businesses.”
- “…people go on holiday not necessarily to travel but for a relaxing break. If there is a problem with money being ‘kept in the hotel’ and not filtering out to the local community,”
then the hotel owners and shareholders should be taxed and
the money given to the community…”

• “Good for those who want to drink a lot and relax in the
hotel grounds only.”

• “…the benefits of choosing all-inclusive holiday packages
such as time consuming, cost, convenience (no need to think
and plan for the entire trip) and safety. However, it will
reduce the motivation of exploring and interacting with the
local communities and cultures which are the key factors of
choosing a destination for tourist.”

Convenience:

• “We actually choose a package to save the hassle of doing
everything separately and we put a degree of trust in a big
company that they will have done their research well.”

• “…all-inclusive holidays can be a convenient option
for busy people, e.g. families or large groups of people, for
example, a group of students going on holiday but in my
opinion, most seem to benefit the tourist agency and the	
tourists more than the local community.”

Other:

• “All-inclusive indirectly benefits hundreds of thousands…”

• “I think the very fact more people are choosing this type of
holiday shows it is what the tourist wants.”

Downsides & areas for improvement
with the all-inclusive holiday model:

Some all-inclusives are far more
responsible than others:

• “Inclusive resorts are very different. Some of them take
already impacts on the environment in consideration and try
to provide benefits to local communities.”

• “I think there could be a sustainable model to all-
inclusives, but haven’t seen it in evidence yet”

• “All-inclusive holidays seem to be a mixed bunch – I have
been on several over the years, some have been excellent, some
mediocre…”

• “My experience of all-inclusive holidays varies depending
on the country and hotel…”

The AI model is unsustainable:

• “It is possible for all-inclusives to be run responsibly. Where
goods and services really are sourced locally and not
imported, accommodation made from sustainable local
materials and with the local architecture in mind, and
real partnerships are formed with local tourism providers
and the local food industry to provide travellers with local
experiences, the experience can be beneficial to the host
community and richer for the travellers. A truly responsible
or sustainable form of all-inclusive would be welcome
for most travellers – still catering to their desire for value
and ease, but also with commitment to local people, and
creating a memorable experience.”

• “All-inclusives could employ local people on a living wage,
use local produce in the kitchen, organise craft fairs from local
artists in the hotel. Others could pay minimum or exploit
workers, use mass produced food and block all attempts to
involve community. Don’t think it’s a case of all-inclusives –
Good or Bad: Many questions within the business model.”

• “Just like supermarkets that take the trade away from
individual high street shops, the large tour operators are
taking business away from local offerings to people on holiday.
This can only make holidays (and shopping) more generic and
boring, while the workers are paid less and the companies
make more and more profit. I agree that it is very important
to discourage this aggressive model, as it only benefits the
shareholders and company directors.”

• “…All-inclusive packages do not benefit the workers at
hotels, let alone the local communities. It’s appalling that this
Views and comments

is even 'allowed' to take place but it's the tourism policies of the country that invite this type of tourism'.
• “I believe that even more important is the aggressive cost-cutting squeeze that tour operators are putting on all hotels, whether all-inclusive or not.”
• “All-inclusive holidays should be banned. They make people stay in the hotel for the whole time of stay. They don’t get to know the place they visit, let alone the culture or people. Plus, it’s only those rich Western companies who benefit, very little goes to the local people.”
• “All-inclusive holidays damage the local business and lead to people wasting food/drink. I have seen people eating “all day” but leaving most, which is unforgivable when so many are without food.”
• “…Is there an alternative business model where the tour operators sell them at all-inclusive prices to tourists yet work with local communities to ensure they get some of the benefits?”
• “All-inclusives are volume drivers. As such, they bring volumes to communities which otherwise would have hosted only a few intrepid travellers. …The small additional income source/revenue is often offset by environmental degradation, community exclusion and breakdown in traditional economies and community networks. However, it is also true that these are sometimes the only affordable means of holiday for many families and often also a significant source of income and employment for locals. I think all-inclusive CAN be beneficial, so long as it also includes the wider community.”
• “It’s not important whether the product is all-inclusive or not. It’s HOW the product is packaged. If the tour operators include local businesses in their all-inclusive holidays, it will definitely benefit the local economy.”
• “Yes the resort was stunning, yes, the weather was beautiful, but did I see Mexico? No. The resort management really should try to incorporate affordable links to the outside world to integrate the wider community more”.
• “I feel that all-inclusive resorts (if they have to exist!) have a moral and social obligation to the communities and cultures around them so that the influx of tourists is beneficial to both the hotel and the surrounding community.”
• “I lived in and saw first hand how all-inclusives helped turn previously flourishing resort towns into almost ghost towns. I understand that the luxury of holiday could be available to all by ‘affordable all-inclusive holidays but where is the education about the impacts upon the destination? Those offering all-inclusives must encourage their clients to still go out and explore the area, use local businesses, respect the environment, speak up if they see worker abuse – be a concerned tourist”
• “I own a hotel that is all-inclusive: but it is 100% Community Operated. Guide, activities and transport services are given out to local community members. All staff and management are from the local village. I do think that generally all-inclusive resorts can be bad for local communities, BUT it really depends on how the model is set up. Stereotypes and generalizations don’t always work in this industry.”

No alternatives:
• “Chose four days in an all-inclusive in Cuba because no alternative for what we needed and very little to buy outside main towns”
• “…Mexico you had no choice, I believe all hotels are all-inclusive…”
• “…you really have to take all things into consideration as the prices of all-inclusive holidays are rising and you have to weigh up if is cheaper to go all-inclusive or half board.”

Responsibility lies with tour operator and resorts to connect with local host destination:
• “It should be the responsibility of tour operators to make sure local communities are incorporated within the value chain and not blame tourists for purchasing all-inclusive holidays that do not benefit local people.”

Demand for meeting local people:
• “The consumer benefits on cost, but loses on local contact.”
• “I am reluctant to go on all-inclusive holidays as you do not get the feel for the country by sampling their culture and local delicacies as the hotels tend to cater for European meals. Also most of the hotels which offer all-inclusive packages are very large hotels and I prefer to stay in smaller hotels where you are a name and not a number…”
• “All-inclusive holidays are the worst kind of tourism activity, especially for developing counties, for they are usually offered by transnational hotel chains, and the little benefit they could yield for the country, region and/or community goes to the foreign owners. This kind of tourism is even worse than the extractive industry, for these enterprises at least have to pay a fee for benefitting from the natural environment, whereas tourism just uses and abuses natural and cultural heritage to its own particular benefit, giving NOTHING in exchange!”
• “I have only been on an all-inclusive holiday once – it felt very segregated from the community and ‘false’.”
People who go on all-inclusive holidays tend to never leave the grounds of their hotel, as all meals are included and they rarely want to spend any extra money elsewhere if they do not have to. This type of tourist becomes demanding of what 'they are entitled to' as part of their package holiday, therefore become obnoxious and this reflects on how they treat staff.

The only thing all-inclusive holidays offer is an abundance of cold / lukewarm food and an excuse to binge drink all day, every day. What does this offer to local communities and tell people about the Great British holiday maker. The British would be up in arms if large amounts of tourists to the UK never spent money in local businesses and remained locked within a compound wall!

I can think of nothing worse than an all-inclusive holiday – cocooned from the locals; experiencing the local culture only on the periphery (staged as it were); might as well watch a TV travel show!

Impact on restaurants:

Watching your favorite restaurants struggle to make ends meet while a thousand people eat chips in their hotel is a disgrace.

Would not go on an all-inclusive holiday again as I do not think it benefits locals enough

I feel that all-inclusive holidays would greatly improve tourists’ experiences and local communities if they included more small, authentic restaurants and other small local businesses and enterprises.

I enjoyed wonderful all-inclusive holidays in CUBA and TUNISIA both of which left me with mixed feelings as I watched local restaurateurs trying to entice customers into near empty restaurants.

If operators were to offer lunch etc included with daytime activities such as cultural trips that might counter some of your concerns?

The all-inclusive model worked well for our family but I still don’t like it from the aspect of detracting from the local economy, particularly the restaurants/bars.

I’ve only been on one and it was very nice – would have liked to go to more restaurants outside and tours of the island, but simply couldn’t afford to do so.

All-inclusives in certain parts of the world are a positive source of work for locals, however in many parts of Europe they are killing tourism and having a significant negative impact on local businesses and economies.

Need for education about all-inclusives

When we went on our all-inclusive I was less aware of the impact than I am now. However, they do offer great value for money to families with older teens and cost and enjoyment is important…but if more people were made aware at least they may think twice.

I have used all-inclusive resorts but have become enlightened and will never use them again for the sake of the local economy.

More needs to be done to ‘educate’ tourists about standards in less developed economies.

I would love a guide to help me find family friendly holidays that benefit the local community and (if possible) the environment, but at least, do no harm.
MAIN FINDINGS

1 55% of survey participants believe the shift towards all-inclusive holidays is a negative development.
   • However, 42% of the survey respondents are likely to go on an all-inclusive holiday in the next 2 years.

2 Of those survey participants who have been on an all-inclusive holiday:
   • 32.8% have never left the resort to visit a local restaurant
   • 34.47% have never gone on an excursion outside the resort.

3 87% of the survey participant sample believe tourists benefit from all-inclusive holidays. A further 85.72% believe tour operators benefit from all-inclusive holidays.

4 62.30% of participants that have not been on an all-inclusive holiday believe local communities are worse off with the introduction of all-inclusive resorts.
   • Only 28.23% of respondents that have been on an all-inclusive feel that local communities are worse off.

5 66.12% of respondents that have not been on an all-inclusive believe that local businesses are worse off with the introduction of all-inclusives.
   • 32.08% of respondents that have been on an all-inclusive believe that local businesses are worse off.

6 The trend towards all-inclusive holidays is seen as ‘very negative’ by 18.4% of respondents that have been on an all-inclusive, and 20.21% feeling that this shift was ‘very positive’.
   • 51.52% of respondents that have not been on an all-inclusive believe that the shift to all-inclusives was a ‘very negative’ development. Only 3.05% felt the shift was a ‘very positive’ shift.

7 72.43% of respondents who have been on an all-inclusive holiday claimed that Beaches & warm weather are the most important factor on a holiday, whereas People and culture accounted for 45.01%.
   • 76.92% of respondents that have not been on an all-inclusive claimed that People and culture was the most important factor, with 45.01% claiming Beaches & warm weather were most important.

8 Survey participants rated the following issues as ‘Very Important’:
   Environmental issues:
   • All-inclusive holiday makers: 23.8%
   • Not been on an all-inclusive holiday: 39.0%

   Ethical issues:
   • All-inclusive holiday makers: 23.9%
   • Not been on an all-inclusive holiday: 41.1%

   Impact on local community:
   • All-inclusive holiday makers: 23.9%
   • Not been on an all-inclusive holiday: 41.8%

QUESTION 1:
Have you ever been on an all-inclusive holiday?
Note: 15 participants (0.9%) skipped this question.
68.6% of survey respondents had been on an all-inclusive holiday; 31.4% of the population sample had not.
72% of respondents from the UK had been on an all-inclusive holiday, as compared to 41% of international respondents.

FIGURE 1: Total respondents AI vs. Non-AI

FIGURE 2: UK respondents AI vs. Non-AI

FIGURE 3: Overseas respondents AI vs. Non-AI
resentment towards them in some local people. However, it is also arguable that the negative impact of the friendliness of locals was only 78.24%, the figure for the friendliness of locals was only 3.11%, the figure for value for money was only 1.17%, and the figure for facilities at resort was only 0.52%.

Note: 967 participants (55.5%) skipped this question.

### TABLE 3: Top 5 all-inclusive destinations from survey participants.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>21.2%</td>
</tr>
<tr>
<td>Turkey</td>
<td>14.7%</td>
</tr>
<tr>
<td>Egypt</td>
<td>10.7%</td>
</tr>
<tr>
<td>Mexico</td>
<td>6.8%</td>
</tr>
<tr>
<td>Cuba</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

### Inside the all-inclusive resort

#### QUESTION 3A:
**Thinking of your last all-inclusive holiday please rate the following:**
Value for money, Facilities at the resort, Facilities outside the resort, Local tours, Ability to meet locals, Friendliness of staff, Friendliness of locals

Note: 967 participants (55.5%) skipped this question.

Many people choose all-inclusive holidays either because they are perceived as being cheap or because the costs are largely known in advance. It is therefore not surprising that, of survey respondents who had been on an all-inclusive holiday, 82% rated ‘value for money’ as good or excellent.

The majority were also happy with what all-inclusives offer, with facilities inside the resort rated either excellent or good by 75.91% of participants.

Whilst staff friendliness was rated as excellent or good by 78.24%, the figure for the friendliness of locals was only 57.27%. Both figures were higher for long haul destinations. Given that guests in all-inclusives leave the hotel infrequently, it may be that they have less chance to engage with local people. However, it is also arguable that the negative impact of all-inclusive hotels on the local economy can engender resentment towards them in some local people.
Research findings

Venturing Outside the Resort

QUESTION 3B:
Thinking of your last all-inclusive holiday please rate the following:
Value for money, Facilities at the resort, Facilities outside the resort, Local tours, Ability to meet locals, Friendliness of staff, Friendliness of locals

Note: 967 participants (55.5%) skipped this question

FIGURE 8: AI respondents to international destinations – friendliness of staff and locals

FIGURE 9: AI respondents to EU destinations – friendliness of staff and locals

FIGURE 10: AI respondents – facilities outside resort

FIGURE 11: AI respondents – local tours

FIGURE 12: AI respondents to international destinations – friendliness of staff and locals
includes those employed within the hotel.

10.05% rated them excellent or good for meeting locals. 10.05% rated them excellent or good for meeting locals.

FIGURE 13: AI respondents to international destinations – friendliness of staff and locals

Only 10.75% survey participants who had been on an all-inclusive holiday rated facilities outside the resort as excellent. While this could simply be because guests have less incentive to search for facilities outside, it could also reflect the negative impact of all-inclusives on local facilities.

46.2% of participants claimed that the local tours were either excellent or good. Clearly cooperation between all-inclusives and local tour operators can be fruitful. Since almost 20% of participants answered ‘I don’t know’, suggesting that they have not been on such a tour, there is potential for more local tours to be sold.

37.9% of participants rated all-inclusive hotels as excellent or good for meeting locals. 10.05% rated them as very poor. However, it is not clear whether ‘locals’ includes those employed within the hotel.

The responses suggest that meeting locals is somewhat easier on all-inclusive holidays in Europe than in long-haul destinations, perhaps reflecting a greater reluctance to leave the hotel in the latter case.

FIGURE 14: AI respondents to EU destinations – friendliness of staff and locals

QUESTION 4:
When thinking of your last all-inclusive holiday how often did you use services not provided in the package (i.e. restaurant, excursions, etc):

(Note: 971 participants (55.8%) skipped this question.)

Participants were asked how often they used ‘external services’ which are not provided in the all-inclusive package, such as eating in local restaurants, going on local excursions & tours or visiting a bar. Responses varied from 32.8% never going to a restaurant in the local community, 30.47% never going to a local bar, and 34.47% never going on an excursion outside the resort. Whilst understandable inasmuch as guests have prepaid for some or all of these at their hotel, these results also

FIGURE 15: AI respondents – frequency of using external services
highlight the negative impact of the all-inclusive model on local businesses, as well as the reduced cultural exchange. Nonetheless, the 2014 Post Office Travel Money survey found that 70% of guests did pay for extras that were not included in their package. 24% paid for branded alcohol, for example, and 28 per cent for spa treatments. Clearly the use of external facilities is not only limited by holiday makers budgets.

“I think of all-inclusive holidays as being led by tour operators in countries not in the destination and so see them as beneficial to businesses / operators in countries that are external to where the holiday destination is. Is there a model where all-inclusive holidays could be to the advantage of workers / communities in the destination country?”

Survey Respondent, 2014
All-inclusive Packages: Who benefits and who is worse off?

The following set of questions was asked of all survey participants, both those who had been on an all-inclusive holiday and those that had not.

QUESTION 5:
Who do you think benefits from all-inclusive holidays?
(Note: 557 participants (31.9%) skipped this question.)

Over 60% of participants believe that tour operators benefit a lot from the all-inclusive model, and a further 24.59% that they benefit somewhat. 48.76% rated tourists as benefiting a lot and 39.23% as benefitting somewhat. Contrast these figures with those for local communities. Just 5.37% believe that local communities benefit a lot from the all-inclusive model, whilst over 70% believe they are worse off in some way. The figures were similar for respondents’ views on the benefits to local businesses.

Clearly participants in our survey perceive a significant inequity in the model. Yet, with greater popularity and demand for cheap all-inclusive holidays, and competition between the tour operators intensifying, this is, if anything, likely to worsen. In some resorts there is effectively a ‘race to the bottom’ – with competition putting increased pressure on costs along the entire supply chain. The enormous bargaining power of international tour operators can force hotels to tighten their margins, sometimes resulting in lower wages for staff, and lower margins for local suppliers. They can also force independent resorts to convert to all-inclusive even though they may be paid very little for each room.

Often little of the money paid for an all-inclusive holiday ‘trickles down’ to the local community or region. Previous research by Tourism Concern in Turkey found that in an all-inclusive Holiday Village in Fethiye, just 10% of tourist spend reached the regional economy. It estimated that the average guest spend in the village shops was only 1 Euro per guest per day [6].

![Figure 18: Total respondents – ‘tourists benefit from AI’](image1)

![Figure 19: Total respondents – ‘tour operators benefit from AI’](image2)

![Figure 20: Total respondents – ‘local communities benefit from AI’](image3)

![Figure 21: Total respondents – ‘local businesses benefit from AI’](image4)
Research findings

The differing opinions of those that have been an all-inclusive holiday, and those that have not are shown in the graphs below. Clearly those who have been on all-inclusive holidays believe there is a greater benefit to local communities and businesses than those who have not. Given that the lack of engagement with local businesses suggested by earlier survey questions, this may not be based on any particular knowledge derived from their experience. It is more likely that the negative perception of those who have not been on an all-inclusive holiday – with over 60% believing that local communities and local businesses are worse off as a result of the model – is directly related to why they have chosen not to go on such a holiday.

Although 54.31% of survey participants believed that workers benefited from all-inclusives, our own research [3] suggests that in reality they face a variety of unfavourable working conditions (see page 5). Although all-inclusive resorts may be beneficial for local people in terms of employment, it is essential that ‘decent’ working conditions, labour rights and training at all-inclusive resorts are not only offered there, but also demanded by tour operators.

Again there is a significant difference between those who have been on an all-inclusive holiday, and those that have not. Whilst 25.96% of the former believe that workers in hotels benefit a lot from all-inclusives, only 8.66% of those that have not been to an all-inclusive agree.
Trends towards all-inclusive holiday packages

QUESTION 6:
On balance do you think that the move to more all-inclusive holidays is a positive or negative development?
(Note: 558 participants (32.1%) skipped this question)
More than 55% of all respondents believe that the shift towards more all-inclusive holidays is a negative development. This comprises more than 84% of those who have never been on an all-inclusive holiday and around 35% of those who have. Nonetheless, only 50% of the latter (10% of the former) feel the trend is a positive one, which raises some serious questions for tour operators about the holidays they offer.

FIGURE 27: Total respondents – The shift towards AI is...

TABLE 4: Comparison of holiday makers who have been on all-inclusives, and those who have not.

<table>
<thead>
<tr>
<th></th>
<th>Have not been on an all-inclusive holiday</th>
<th>Have been on an all-inclusive holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very positive</td>
<td>3.05%</td>
<td>37.09%</td>
</tr>
<tr>
<td>Somewhat positive</td>
<td>6.09%</td>
<td>14.42%</td>
</tr>
<tr>
<td>Neither positive or negative</td>
<td>6.35%</td>
<td>13.58%</td>
</tr>
<tr>
<td>Somewhat negative</td>
<td>32.99%</td>
<td>10.09%</td>
</tr>
<tr>
<td>Very negative</td>
<td>51.52%</td>
<td>24.42%</td>
</tr>
</tbody>
</table>

QUESTION 7:
Do you think that the all-inclusive model (in places where there are alternatives) can ever benefit local communities?
(Note: 562 participants (32.3%) skipped this question)
Responses to whether the all-inclusive model can ever benefit local communities are mixed. Again there is a difference according to whether they had been to an all-inclusive hotel or not, but in both cases there is a view amongst the majority that the all-inclusive model can at least occasionally benefit local communities. The question this raises is how the model might be adapted to maximise such benefits.

FIGURE 28: Total respondents – Can AI benefit local communities?

FIGURE 29: Non-AI respondents – Can AI benefit local communities?

FIGURE 30: AI respondents – Can AI benefit local communities?
Research findings

**QUESTION 8:**
How likely is it that you will go on an all-inclusive holiday in the next two years? (Note: 559 participants (32.1%) skipped this question)

Overall 42% of respondents think it is likely that they will go on an all-inclusive holiday in the next 2 years. 46% think it unlikely.

As shown in the breakdown of responses presented in table 15 (below), those who have previously been on an all-inclusive holiday are much more likely to go again than those that have never been. Respondents from the UK are also significantly more likely to choose an all-inclusive holiday than respondents from overseas.

![FIGURE 31: AI respondents – Can AI benefits local communities?](image)

**FIGURE 32: Total respondents – Factors influencing a holiday**

![FIGURE 32](image)

**TABLE 15: Key Findings Comparison of holiday makers likelihood of booking an all-inclusive holiday in the next two years.**

<table>
<thead>
<tr>
<th></th>
<th>Have not been on an all-inclusive</th>
<th>Have been on an all-inclusive</th>
<th>Holiday makers based in UK</th>
<th>Holiday makers from abroad</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>5.56%</td>
<td>42.17%</td>
<td>37.09%</td>
<td>8.11%</td>
</tr>
<tr>
<td>Likely</td>
<td>4.29%</td>
<td>16.04%</td>
<td>14.42%</td>
<td>4.50%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8.08%</td>
<td>13.58%</td>
<td>11.63%</td>
<td>18.92%</td>
</tr>
<tr>
<td>Unlikely</td>
<td>20.20%</td>
<td>10.09%</td>
<td>12.44%</td>
<td>17.12%</td>
</tr>
<tr>
<td>Very unlikely</td>
<td>61.87%</td>
<td>18.11%</td>
<td>24.42%</td>
<td>51.35%</td>
</tr>
</tbody>
</table>

**QUESTION 9:**
When planning your holiday what are the three most important factors that influence your choice of destination & type of holiday? (Note: 754 participants (43.3%) skipped this question).

Figure 32 above shows how important different factors are for respondents when choosing a holiday. Cost was the most influential factor, followed closely by access to warm weather/beaches and people/culture.

A comparison between those who have been on an all-inclusive holiday and those who have not (figures 33 and 34, opposite) highlights some expected differences in what each look for in a holiday. In particular it shows greater preference for warm weather and beaches for all-inclusive customers, with less emphasis on people and culture.

Figures 35 and 36 give a comparison between UK respondents, and those from overseas, with the latter significantly more interested in culture and people than in warm weather and beaches.

Figures 37 and 38 clearly illustrate that tourists going on European & Mediterranean all-inclusive holidays prioritise value for money and warm weather on the coast. Visitors to ‘long haul’ locations, whilst still concerned about cost, place more emphasis on culture than on weather.
QUESTION #10:
On a scale of 1 (very important) to 5 (not at all important) please rate how important the following are to you when choosing your holiday.
(Environmental considerations, Ethical Considerations, Impact on local communities)
(Note: 753 participants (43.3%) skipped this question.)

Participants were asked to rate the importance of environmental aspects, ethical considerations and impact on the local community. The results are shown opposite. It is interesting that all participants rate the ethical and sustainable aspects of their holiday as important, although those that have been on an all-inclusive holiday value them somewhat less.

It is clear that all holiday makers would welcome holidays that prioritise environmental and ethical considerations and maximise benefits to the local community.

“I have a small restaurant next to an all-inclusive hotel. Before the hotel went all-inclusive we had 7 staff, now it’s just me and my husband.”
Survey Respondent, 2014
Ethical impacts of a holiday

FIGURE 40: Non-AI respondents – Ethical impacts of a holiday

FIGURE 41: AI respondents – Ethical impacts of a holiday
Summary & Recommendations

It is clear from the survey results and the views of participants (see pages 6 to 9) that, while there is continuing demand for the advantages that the all-inclusive model offers to some holiday makers, there is also an increasing awareness of the model’s negative impacts, even among those who enjoy the all-inclusive experience. And tellingly, there is evidence that these holiday makers too want a fairer deal for local communities. This is something the industry must begin to take on board.

Tourism Concern’s recent research suggests that the current mainstream all-inclusive model is still perpetuating social and economic exclusion and inequality, while threatening the very character of the destinations that tourists pay to visit. This is neither fair nor sustainable tourism. [6].

All-inclusives are clearly attractive, particularly to families, singles, elderly travellers and to larger groups. They offer safety, convenience and a predictable overall cost which is often also seen as ‘value for money’. It is therefore unsurprising that there is a continuing demand for all-inclusive holidays. Our literature review and survey findings indicate that around 40% of UK adults have taken an all-inclusive holiday, while 42% of our survey participants indicated that they are likely to go on an all-inclusive in the next two years.

However, the currently predominant all-inclusive model creates a range of problems, from lack of benefits to local communities and businesses, to a lack of meaningful engagement with local culture for the tourists. The key question is whether the model is inherently flawed, or whether a fairer and more sustainable all-inclusive model might be possible.

The literature review and survey findings have identified problems including economic exclusion, export leakage, inadequate labour rights, barriers to cultural interaction and environmental degradation to local ecosystems. It is also clear that the ‘value for money’ appeal of all-inclusives can be misleading, with many all-inclusive packages including fewer ‘luxuries’ than was once the case, and guests purchasing ‘add ons’. In many cases, B&Bs and half board packages offer cheaper holidays, with more cultural interaction and economic benefits to local businesses. Tourists can make a difference by choosing holidays that offer a fair deal for local businesses and people [6]. Such alternatives include half-board packages, bed and breakfasts packages, or independent local hotels that have been recommended by reputable organisations.

Equally though, there are all-inclusive resorts which are working to support host communities. They can be (partially) locally owned. They can source the majority of their supplies locally. They can employ workers from the local region and offer training to help those staff progress. They can seek to limit their environmental impact by encouraging guests to limit water use, to recycle, and to avoid excessive waste. They can encourage guests to join trips run by local operators and guides and to visit local amenities. They can invite local craft vendors into the hotel free of charge.

Addressing these issues requires UK tour operators and internationally owned all-inclusive hotels to take a rights-based approach to sustainability, and to undertake due diligence throughout their supply chains in order to identify and address the negative impacts of the all-inclusive model, and the ‘race to the bottom’ that this is precipitating [6]. At the same time, holiday makers must be made more aware of the potential impacts of their holiday. The more people seek ethical and equitable types of holiday, the more their influence will provide an economic as well as ethical incentive to change the all-inclusive model, to the benefit of everyone.

“All-inclusives make people stay in the hotel for the whole time of stay. They don’t get to know the place they visit, let alone the culture or people. Plus, it’s only those rich Western companies who benefit, very little goes to the local people.”

Survey Respondent, 2014

“It should be the responsibility of tour operators to make sure local communities are incorporated within the value chain and not blame tourists for purchasing all-inclusive holidays that do not benefit local people.”

Survey Respondent, 2014
Research indicates UK population has a growing appetite for all-inclusive holidays.

Tourism Concern recommends that UK Tour operators integrate a responsible tourism framework into every all-inclusive package.

Survey results found that all-inclusives differ dramatically in their commitment to responsible tourism. Spreading best practice throughout the sector is clearly necessary.

Alternatives:
Holiday maker considers all tourism modes – B&B, Half-board, All-inclusives.

Access:
Does holiday provider encourage access to local shops, cafes & restaurants?

Active:
Is the holiday provider proactive in promoting CSR & responsible tourism practices?

Associate:
Does the holiday provider give guests an opportunity to interact & learn from local culture and people?

Supporting Local Economy:
Build networks with local businesses & community groups to enhance ‘trickle down’ effect.

Value for Money:
Continue to offer the ‘fixed budget’ holidays that make all-inclusives attractive as part of a sustainable business model.

Cultural Interaction:
Improve avenues for interaction between guests & locals by encouraging external activities.

Certification & CSR:
UK based tour operators adhere to WTO code of ethics & illustrate commitment to local communities, reinvesting in host destination.

Safety & Convenience:
Continue to provide a safe and secure environment for visitors to access new destinations.

Holiday makers' Checklist for Responsible Tourism
References


