



Tracking the travel industry



Which companies are checking
out of wildlife cruelty?

Contents

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Cover image: In principle, observing dolphins in the wild is more responsible than observing them in captivity - if managed and implemented responsibly and appropriately. In the wild, dolphins are completely free, live in their natural habitat, and can undertake all of their natural behaviours, such as hunting, foraging, resting, playing and travelling.



Image: Local sloths are taken from the wild and used for harmful selfies with tourists, in Manaus, Brazil.

Foreword

The Covid-19 pandemic is hitting international tourism hard. With it, however, comes the unprecedented opportunity for the tourism industry to build back better. Travel companies worldwide have the chance to make true change for their industry and for animals by changing the demand and supply for captive wildlife experiences. This report from World Animal Protection is a tool to help make that change happen.

Throughout the world, wild animals are taken from the wild, or bred in captivity to be used as entertainment in the tourism industry. In most cases they are separated from their mothers at an early age, exposed to harsh training that causes physical and psychological damage. They experience harm, stress and discomfort in their unsuitable living conditions at entertainment venues. They are exploited for commercial gain.

Eighty five percent of tourists interviewed in our 2019 global poll believed that tour operators should avoid activities that cause wild animals suffering.¹

'Tracking the travel industry' is the first study of its kind to compare the animal welfare commitments of 14 of the world's leading travel companies. We commissioned the University of Surrey in the UK to independently analyse the public commitments travel companies have made to improve the lives of wildlife in tourism activities. Companies are ranked in point order. This is to highlight the best performing travel companies and those who need to make significant improvement so they are not left behind more progressive firms.

'Tracking the travel industry' is a valuable tool based on a comprehensive methodology. Companies can use it to improve their animal welfare commitments, phase out harmful wildlife tourism activities and effectively communicate these ideas and their progress to customers.

Each company has been provided with details of its assessment and clear guidance, supported by our technical expertise, on how they can improve their performance on animal welfare. Our guidelines 'How to draft an animal welfare policy' and '10 steps to becoming wildlife-friendly' in Appendix 1 and 2 are vital starting points for those companies currently without an animal welfare policy.

This first issue of 'Tracking the travel industry' is a benchmark. By repeating this independent assessment regularly, we can shine a light on the state of the travel industry regarding animal welfare and help companies document their progress towards being wildlife friendly.

'Tracking the travel industry' and subsequent reports will be used as tools to educate, inspire, encourage and support these and other travel companies to improve animal-related tourism practices. With our supporters and travellers, we want companies to be accountable for their animal welfare practices and drive transparent public reporting.

We encourage travel companies to have full information about their supply chains including animal experiences so they can become true leaders for animals. Our intention is to help travel companies grow their ethical sustainability credentials, by identifying and implementing solutions that ensure good welfare and protection of the animals involved.

¹ 2019, commissioned to Kantar TNS, global online survey of 12,000 people across 12 countries (Denmark, Germany, Netherlands, Sweden, the UK, China, India, Thailand, Canada, the USA, Australia, and Brazil).



Image: Dolphins are kept captive in small pens or pools where tourists can interact with them.

Executive summary

'Tracking the travel industry' assesses and ranks the animal welfare commitments of 14 of the world's leading travel agents, attraction and experience companies, and tour operators. The research was commissioned by World Animal Protection and undertaken by the University of Surrey. The research and subsequent rankings give industry leaders, our supporters and the public a clear picture of the progress the travel industry has made in committing to animal welfare. 'Tracking the travel industry' also clearly spells out the work that needs to be done.

The comprehensive methodology ranks companies across four key areas.

1. **Commitment:** Availability and quality of published animal welfare policies and how applicable they are to all their brands.
2. **Targets and performance:** Availability and scope of published time-bound targets and reports on progress towards meeting animal welfare commitments.
3. **Changing industry supply:** Availability and quality of engagement with suppliers and the overall industry, to implement wildlife-friendly changes.
4. **Changing consumer demand:** Availability and quality of educational animal welfare content and tools to empower consumers to make wildlife-friendly travel choices.

After finalising the scores, companies were graded as seen on the next page.

Figure 1: Overall company rankings

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|--|-----------|-------|------------|-------------------------|--------------------------|--------------------------|
| | | Grade | Score | | | | |
| 1 st | airbnb | Very good | 68% | 77% | 69% | 40% | 80% |
| 2 nd | Booking.com | Good | 48% | 67% | 64% | 10% | 33% |
| 2 nd | The Travel Corporation | Good | 48% | 70% | 42% | 7% | 50% |
| 2 nd | Tripadvisor | Good | 48% | 40% | 53% | 43% | 63% |
| 2 nd | viator | Good | 48% | 47% | 58% | 43% | 43% |
| 3 rd | TUI (TUI.co.uk) | Fair | 45% | 47% | 53% | 73% | 7% |
| 4 th | DER Touristik | Fair | 35% | 53% | 0% | 50% | 17% |
| 5 th | Expedia | Poor | 22% | 27% | 0% | 7% | 50% |
| 6 th | FLIGHT CENTRE | Very poor | 15% | 30% | 0% | 0% | 17% |
| 7 th | Attraction Tickets.com <small>Formerly Attraction Tickets Direct</small> | Very poor | 13% | 17% | 0% | 7% | 23% |
| 8 th | Trip.com | Failing | 5% | 3% | 0% | 3% | 13% |
| 9 th | GET YOUR GUIDE | Failing | 3% | 0% | 0% | 0% | 13% |
| 9 th | KLOOK | Failing | 3% | 0% | 0% | 0% | 13% |
| 9 th | musement | Failing | 3% | 0% | 0% | 0% | 13% |



Five of the world’s leading travel companies received ‘very good’ or ‘good’ grades. These are Airbnb, Booking.com, The Travel Corporation, Tripadvisor and Viator – all of which have invited advice from World Animal Protection. These grades are a testament to the steps some companies have already taken to protect animals.

The scores in this independent assessment also reflect that becoming a truly wildlife-friendly company is a journey. Even in ethically progressive companies there is ample room for improvement.

No matter how high or low their rankings, all 14 companies can improve their commitment and implementation of animal welfare practices. This will ensure their suppliers meet meaningful standards and their customers enjoy safe holidays.

Why protecting wildlife in tourism matters

Captive wildlife in tourism

Worldwide, wild animals are taken from the wild or bred in captivity to be used for entertainment in the tourism industry. Activities and attractions that are considered wildlife entertainment (see 'What is wildlife entertainment?' below) are those allowing tourists close contact with wild animals or to see them perform. Popular examples include: tiger cubs made to pose with tourists for selfies, elephant rides and bathing, and swim-with-dolphin experiences.

Captive wildlife tourism often requires the removal of wild animals from their natural habitats, or separation from their families at an early age if captive-bred. It is a known driver of legal and illegal wildlife trade. Keeping wildlife in captivity for entertainment offers no genuine benefit to conservation.

The entertainment is not only demeaning, the suffering starts the moment the animals are captured from the wild or bred in captivity. In most cases they are separated from their mothers at an early age, before often being exposed to harsh training which causes physical and psychological damage. They experience harm, stress and discomfort at entertainment venues which fail to meet their basic wild animal needs.

A study by Oxford University's Wildlife Conservation Research Unit (WildCRU), commissioned by World Animal Protection, reported up to 550,000 wild animals suffering for tourist entertainment in wildlife attractions worldwide. They also found that very few travellers can recognise animal cruelty and consequently continue to leave positive reviews for low-welfare venues.¹

However, some wildlife attractions are humane and ethical and contribute to the protection of wild animal populations, harnessing tourism's potential to be an economic rationale for protecting nature. These attractions may include observing wild animals responsibly in their natural habitats from a safe and respectful distance. They may also involve viewing them in genuine sanctuaries or wildlife-friendly facilities that are part of efforts to phase out captive wild animal use for tourist entertainment.

Given that few tourists recognise animal cruelty, travel companies need robust animal welfare policies that protect wildlife at tourist attractions to which they sell tickets and promote. Travel companies must empower customers to make animal-friendly travel decisions. This involves 'choice editing'ⁱⁱ and providing ethical alternatives that put the welfare of the animals first, while providing safe, memorable travel experiences.

What is wildlife entertainment?

Wildlife entertainment includes activities that:

- **risk** portraying or trivialising wild animals as pets, novelty objects, comedians, or domesticated species
- **encourage** animals to perform behaviours that are either unnatural, unnecessary, or harmful
- **involve** procedures that may be considered stressful or harmful to all or individual animals
- **expose** visitors or handlers to unnecessary risks of injury or disease
- **profit** beyond what's needed to look after animals at facilities while professing to phase out captive wild animal keeping, or that may risk replication of similar activities in harmful ways in other places.

ⁱⁱ Choice editing refers to the active process of controlling or limiting the choices available to consumers so as to drive to an end goal, in this case, removing cruel wildlife tourism activities and promoting wildlife-friendly alternatives.

Covid-19's impact on tourism

Until early 2020, international tourism growth was strong with 1.5 billion tourist arrivals recorded globally.² The Covid-19 pandemic, however, led to a total stop of international tourism, hitting the popular travel destinations hard.

Besides the serious animal welfare and conservation concerns surrounding wildlife entertainment, Covid-19 has shown how the demand and exploitation of wild animals exposes us all to disease. It has also shown how this cruel treatment damages our social and economic wellbeing.

Sixty percent of emerging infectious diseases are zoonotic, meaning they originate from animals, with 70% of these thought to originate from wild animals.³ Tourism puts millions of travellers into close contact with captive-bred or captured wild animals every year, when the concept of social distancing is critical for public health and wildlife welfare. Covid-19 is likely to cost the global economy between US\$8.1 trillion and US\$15.8 trillion,⁴ putting the world on track for the worst recession since the Great Depression in the 1930s.⁵ The United Nations World Tourism Organisation has said 'tourism has been the worst affected of all major economic sectors'.⁶

Now is the time for the travel industry to build back better as a responsible and resilient sector by integrating animal welfare into company business values and actions.



Image: Tourists bathe elephants at a venue in Thailand. Many venues such as this claim to be 'sanctuaries' yet still allow unacceptable entertainment activities and breed for commercial purposes.

The role of the travel industry

University of Surrey research, commissioned by World Animal Protection in 2018, found almost all travel trade associations worldwide were not providing guidance on animal use in tourism. Out of the 62 entities studied, only two travel trade associations – ABTA in the UK and ANVR in the Netherlands – had set animal welfare guidelines for their members.⁷

As early as 2016, ANVR was the first travel trade association to categorise all elephant shows, elephant riding and other forms of direct tourist contact with elephants as unacceptable.

In 2019, ABTA took a similar stance, launching its updated animal welfare guidelines. The guidelines classify several practices involving wild animals in captive attractions as unacceptable. These include: elephant riding; direct contact with, or feeding elephants without a barrier; direct contact, feeding or 'walking with' wildcats, and direct contact with, or feeding great apes, bears and sloths.

Direct contact with cetaceans such as dolphins is unfortunately not classed as unacceptable. This is despite the inherent cruelty of the dolphin entertainment industry, as documented in our recent report 'Behind the smile'.⁸

Consequently, travel companies should not only rely on ABTA guidelines to set their standards, when cruel activities such as dolphin shows and interactions are still taking place. We recommend all travel companies classify all direct tourist contact and performances with all wild animals as unacceptable.

Visits to wildlife attractions are estimated to account for up to 20-40% of global tourism.⁹ Travel companies worldwide are key in changing the demand and the supply for captive wildlife experiences. Eighty five percent of tourists interviewed in our 2019 global poll believed that tour operators should avoid activities that cause wild animals suffering.¹⁰

This point is critical: Wildlife entertainment venues associated with major household travel brands gain 'social licence to operate'.ⁱⁱⁱ Travel agencies, associations, tour operators and booking platforms promoting and selling wildlife entertainment venues add significantly to this social licence. This is because tourists assume such activities are acceptable, or even beneficial for wild animals, when in fact they are inhumane.

By taking a stance to protect wildlife, companies can also enhance their reputation and revenue. Sixty four percent of travellers said they would not travel with a tour operator if they knew the company promoted the use of wild animals in entertainment. This means companies not proactively moving towards wildlife friendliness are losing business and risking their brand. And 79% of travellers who witnessed animal cruelty said they would pay more for an activity involving animals if they knew the animals did not suffer.¹¹

This demonstrates a significant amount of economic potential for wildlife-friendly venues – a potential not yet realised. The time is ripe for change. As the world tries to recover from the Covid-19 pandemic, the travel industry's leadership has never been more important in rebuilding it better and more responsibly.



Image: A baby tiger spends the entire day in this tiny cage, tourists pay to feed these baby tigers with milk.

ⁱⁱⁱ Social licence to operate refers to the acceptance granted to an organisation or company by various stakeholders who may be affected by the company's activities. As opposed to the formal regulatory and legal licences required to operate a business, it is an informal 'licence' based on winning or losing trust, confidence and credibility.

Methodology

Company selection

The companies featured in 'Tracking the travel industry' are:



The travel companies were chosen based on the following criteria.

Scale

They are the largest in the world, according to data gathered from a number of cross-referenced market intelligence, research, analysis and statistical platforms and sources.

Relevance

They offer (package) tour and activities or experiences with captive wildlife.

Popularity

They are well-known global brands that consumers trust when making holiday choices

The final selection of companies represents the largest online travel agencies, travel platforms and booking facilitators, activity and experience specialists, and traditional tour operator stores worldwide.

Extra information explaining each company's inclusion and the company or parent group data source can be found in Appendix 4.

Building back better

Carried out during June and July 2020, this research was conducted when the industry was focussed on mitigating the immediate impacts of the pandemic. Companies were given advance notice that their public facing animal welfare content was to be assessed. Due to Covid-19 restrictions, however, we recognise that companies might not have had the resources available to check and update their content prior to assessment. That being said, the evidence gathered presents companies with the opportunity to build back better.

Company ranking

University of Surrey researchers relied solely on published, English-language information:

- to encourage better transparency of information published by companies
- to avoid bias in terms of those companies World Animal Protection has engaged with in animal welfare policy development
- to ensure that companies were assessed consistently.

The published information included:

- the material on companies' corporate (ie parent company) websites
- published, publicly available evidence provided by the companies' animal welfare, corporate social responsibility, or sustainability representative.

Individual company reports were independently reviewed by a team of four researchers and industry experts from the University of Surrey. This was to ensure consistent scoring, to check the factual accuracy of the content and to ensure consistency of the assessment methodology.

Companies were assessed across the four summarised key areas below, to give a final percentage score out of 100.



Commitment

Do the companies have a policy which outlines the general animal welfare values of the company and what animal activities do they find acceptable or unacceptable? Which species are covered?

Do the companies make statements of commitment to protect wildlife from harm through tourism?



Targets and performance

Do the companies have targets for meeting their animal welfare commitments?

Do the companies publicly report on their performance in meeting those targets?



Changing industry supply

Do the companies publicly say how they include binding animal welfare standards in the contracts with their suppliers?

Do the companies take a leading role in the sector to determine and promote responsible animal welfare practices?



Changing consumer demand

Do the companies raise awareness of animal welfare issues among consumers and provide advice to change customer attitudes towards wildlife tourism?

Do they provide resources to shape ethical habits and identify ethical activities at attractions involving wild animals?

Do the companies make this information easy to find and are customers encouraged to raise animal welfare concerns with the companies?



Image: At Avilon Zoo in the Philippines, many captive wild animals, including this orangutan are used for selfie opportunities. The zoo is accredited by the Southeast Asian Zoos Association (SEAZA). Whilst accredited or affiliated venues are usually preferable because they have a defined standard of animal welfare to meet, some, like this one still offer unacceptable activities.

Companies could achieve a total of 135 points in 'Tracking the travel industry'. The points are divided as follows.

| Assessment criteria subject areas | Points / Percentage value |
|-----------------------------------|---------------------------|
| Commitment | 30 / 40% |
| Targets and performance | 45 / 20% |
| Changing industry supply | 30 / 20 % |
| Changing consumer demand | 30 / 20% |
| TOTAL | 135 / 100% |

After finalising the scores, companies were graded as below:

| Grade | Score % |
|-----------|----------|
| Excellent | 76 - 100 |
| Very good | 61 - 75 |
| Good | 46 - 60 |
| Fair | 31 - 45 |
| Poor | 21 - 30 |
| Very poor | 11 - 20 |
| Failing | 0 - 10 |

Confidential company reports were created by University of Surrey researchers and shared with the companies, giving the opportunity to provide further clarification on publicly available evidence.

Final company reports were then created. They showed individual scores and comments for each question, and overall scores. The companies were provided with the full methodology to see how and why they received their scores and the improvements needed to score higher in future.

Impartiality and transparency

The selection and assessment of companies were done independently by the University of Surrey at every stage of the study. World Animal Protection employees were not involved at any point during the selection, assessment, scoring or ranking of companies. By relying solely on public information, 'Tracking the travel industry' paints a fair, unbiased picture of the travel industry's transparency and progress towards becoming wildlife friendly.















Image: Social media post of a tourist posing with a tiger at a venue in Canada.

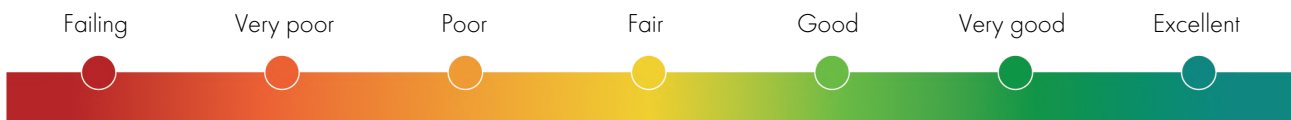


Results

Overall ranking

Figure 1: Overall company rankings

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|--|-----------|-------|------------|-------------------------|--------------------------|--------------------------|
| | | Overall | Score | | | | |
| 1 st |  airbnb | Very good | 68% | 77% | 69% | 40% | 80% |
| 2 nd |  Booking.com | Good | 48% | 67% | 64% | 10% | 33% |
| 2 nd |  The Travel Company | Good | 48% | 70% | 42% | 7% | 50% |
| 2 nd |  Tripadvisor | Good | 48% | 40% | 53% | 43% | 63% |
| 2 nd |  viator | Good | 48% | 47% | 58% | 43% | 43% |
| 3 rd |  TUI (TUI.co.uk) | Fair | 45% | 47% | 53% | 73% | 7% |
| 4 th |  DER Touristik | Fair | 35% | 53% | 0% | 50% | 17% |
| 5 th |  Expedia | Poor | 22% | 27% | 0% | 7% | 50% |
| 6 th |  FLIGHT CENTRE | Very poor | 15% | 30% | 0% | 0% | 17% |
| 7 th |  Attraction Tickets.com <small>Formerly Attraction Tickets Direct</small> | Very poor | 13% | 17% | 0% | 7% | 23% |
| 8 th |  Trip.com | Failing | 5% | 3% | 0% | 3% | 13% |
| 9 th |  GET YOUR GUIDE | Failing | 3% | 0% | 0% | 0% | 13% |
| 9 th |  KLOOK | Failing | 3% | 0% | 0% | 0% | 13% |
| 9 th |  musement | Failing | 3% | 0% | 0% | 0% | 13% |



Airbnb was the company with the highest score overall, it scored well in the commitment, targets and performance and consumer engagement categories.

The Travel Corporation, Tripadvisor, Booking.com and Viator all scored equally well, although each performed differently across categories.





Companies further down the list have significant improvements to make.

Those near the bottom will be left behind by more progressive companies if they do not increase their commitment to animal welfare.

Section 1 – Commitment

This section assessed the content of the companies’ published animal welfare policies and guidelines and their scope.

Figure 2: Company rankings in the ‘Commitment’ category

| Travel company | Overall | % Score |
|---|-----------|---------|
|  | Excellent | 77% |
|  | Very good | 70% |
|  | Very good | 67% |
|  | Good | 53% |
|  (TUI.co.uk) | Good | 47% |
|  | Good | 47% |
|  Tripadvisor | Fair | 40% |
|  | Poor | 30% |
|  | Poor | 27% |
|  Formerly Attraction Tickets Direct | Very poor | 17% |
|  | Failing | 3% |
|  | Failing | 0% |
|  | Failing | 0% |
|  | Failing | 0% |

Companies that scored the highest are Airbnb and The Travel Corporation. Both organisations scored full points when it came to prohibiting performances, fights and races for all wild animals. They also scored highly regarding defining a clear scope for their policy and explicitly making the policy applicable to all suppliers, products and brands.

The Travel Corporation is the only company to achieve full points for their written policy motivations. They include statements recognising that animals are best seen in the wild; that animals in captivity must have positive experiences / 'a good life' and the Five Domains of Animal Welfare (see below). They also acknowledge the travel industry's role towards protecting wildlife.

Points were lost across all companies which allowed direct contact between tourists and wild animals. To increase scores, all contact with wild animals should be classed as unacceptable, or at least with elephants, big cats and cetaceans.

Companies scoring the lowest fit into two categories:

those that have published animal welfare content, but with limited extent and clarity



those yet to publish any animal welfare content



Our recommendation to all companies is to improve their policies when it comes to tourist contact with wild animals and performances. Harmful direct interactions, and activities involving captive wildlife performances should be identified and removed from offers.

Other overall recommendations are to ensure that commitments are made using clear objective language. This applies to both the actual commitments outlined, and to the scope of the commitment document. A practical recommendation, also benefiting transparency, is to ensure that all animal welfare commitments are located within a single policy document, rather than across multiple documents and reports.



Image: Elephants are used for rides, shows and photo opportunities at Ichihara Elephant Kingdom in Japan. The venue is accredited by the Japanese Association of Zoos and Aquariums (JAZA). Whilst accredited or affiliated venues are usually preferable because they have a defined standard of animal welfare to meet, some, like this one still offer unacceptable wildlife entertainment activities.

The Five Freedoms and the Five Domains

Developed several decades ago, the Five Freedoms concept has been a valuable tool for understanding animal welfare. The more modern science-based Five Domains of Animal Welfare model, combined with the concept of 'a good life', recognises the importance of animals having positive experiences. It meets and exceeds the often used Five Freedoms which is limited in its assumption that the absence ('freedom') of negative states would ensure good welfare.

The Five Freedoms

1. Freedom from hunger or thirst
2. Freedom from discomfort
3. Freedom from pain, injury or disease
4. Freedom to express (most) normal behaviour
5. Freedom from fear and distress

The Five Domains

1. **Nutrition** – factors that involve the animal's access to sufficient, balanced, varied and clean food and water.
2. **Environment** – factors that enable comfort through temperature, substrate, space, air, odour, noise and predictability.
3. **Health** – factors that enable good health through absence of disease, injury, impairment and good fitness level.
4. **Behaviour** – factors that provide varied, novel and engaging environmental challenges through sensory inputs, exploration, foraging, bonding, playing, retreating and others.
5. **Mental State** – by presenting positive situations in the previous four functional domains, the mental state of the animal should benefit from predominantly positive states, such as pleasure, comfort or vitality, while reducing negative states such as fear, frustration, hunger, pain or boredom.

Wild animals' needs can only be fully met in their natural environment in the wild. Although the Five Domains and the concept of 'a good life' are important to improve the welfare of captive wildlife, they do not justify keeping them in captive environments.

World Animal Protection recognises, however, that captive wildlife venues practising these concepts are likely to have higher welfare standards than those which do not recognise and implement them.



Image: Orangutans are kept in captivity where some are used for selfie opportunities and entertainment. Tourists visiting Bali are encouraged to visit a variety of wildlife attractions featuring many species and interactions.

Accrediting bodies

The World Association of Zoos and Aquariums (WAZA) is the main global umbrella organisation for zoos and other related institutions. Consequently, it is expected to lead the way with clear animal welfare standards and guidelines for its members, backed by robust monitoring.

However, as our 2019 report, 'The show can't go on'¹² revealed, we found clear evidence that cruel and demeaning visitor attractions are happening at zoos and aquariums linked with WAZA. Activities like big cat shows, dolphins performing stunts, elephant rides and costume-wearing primates used as photo-props were all found in WAZA-linked venues.

Similarly, inadequate conditions and cruel activities have been found in venues accredited by other bodies, such as the Alliance of Marine Mammal Parks and Aquariums (AMMPA). Travel companies cannot rely on accreditation alone as a means to guarantee that captive wild animals have good lives.

That being said, if unacceptable wildlife activities are not already present, accredited or affiliated venues are preferable to non-accredited or non-affiliated venues. Whilst in practice enforcing standards can be an issue, in theory at least they have a defined standard of animal welfare to meet. So, travel companies promoting zoos and aquariums where there are no unacceptable wildlife activities have scored more points if they refer to accredited venues than those not mentioning any accrediting bodies.

The further travel companies move away from promoting zoos and aquaria and towards responsible, certified sanctuary and wild watching experiences, the higher they will score in this section.

Image: A crocodile show at a zoo in Thailand. At some entertainment venues, captive wildlife which take part in shows are also bred for commercial trade.



Section 2 – Targets and performance

This section assessed any published targets the companies set for implementation of their policies and guidelines, and any reporting on performance and progress towards those goals.

Figure 3: Company rankings in 'Targets and performance' category

| Travel company | Overall | % Score |
|--|-----------|---------|
|  airbnb | Very good | 69% |
| Booking.com | Very good | 64% |
| viator | Good | 58% |
|  Tripadvisor | Good | 53% |
|  TUI (TUI.co.uk) | Good | 53% |
|  | Fair | 42% |
|  Attraction Tickets.com <small>Formerly Attraction Tickets Direct</small> | Failing | 0% |
|  DER Touristik | Failing | 0% |
|  Expedia | Failing | 0% |
| FLIGHT CENTRE | Failing | 0% |
|  GET YOUR GUIDE | Failing | 0% |
| KLOOK | Failing | 0% |
|  musement | Failing | 0% |
| Trip.com | Failing | 0% |

Within this section companies were grouped into those who scored from 'fair' to 'very good', and those who scored nothing. Of the six companies which scored for this section (TUI.co.uk, The Travel Corporation, Tripadvisor, Viator, Booking.com and Airbnb), five were awarded points for having already achieved full implementation of their commitments. The exception, The Travel Corporation, has not yet fully implemented their commitments, but scored for having set targets against their policy document to be implemented within one year.

Despite scoring highly, these companies are all recommended to clearly and simply make their targets and progress more explicit on their public websites. No companies provided a breakdown of the number or percentage of excursions, tickets sold or offers involving wild animals. This resulted in missed points for all.















Eight companies scored 0 against this section. For some organisations this was because they have not yet published any animal welfare commitments. Where organisations had animal welfare commitments it was unclear if these had been already implemented, or whether measurable, time-bound targets had been set.

We recommend companies clearly outline when commitments have been fully implemented, including a date of implementation. They should also be more transparent with their targets and reporting process. We are aware that some companies have internal reporting measures and we recommend making these publicly available.

Section 3 – Changing industry supply

This section assessed the efforts of the companies to positively change the practices of their suppliers, and the industry overall, to become wildlife friendly.

Figure 4: Company rankings in ‘Changing industry supply’ category

| Travel company | Overall | % Score |
|---|---------|---------|
|  TUI (TUI.co.uk) | Good | 73% |
|  DER Touristik | Good | 50% |
|  Tripadvisor | Fair | 43% |
|  viator | Fair | 43% |
|  airbnb | Fair | 40% |
|  Booking.com | Failing | 10% |
|  Attraction Tickets.com <small>Formerly Attraction Tickets Direct</small> | Failing | 7% |
|  Expedia | Failing | 7% |
|  THE TRAVEL CORPORATION | Failing | 7% |
|  Trip.com | Failing | 3% |
|  FLIGHT CENTRE | Failing | 0% |
|  GET YOUR GUIDE | Failing | 0% |
|  KLOOK | Failing | 0% |
|  musement | Failing | 0% |

Five companies scored 'fair' to 'good' in this category, with TUI scoring the highest. TUI was awarded points for incorporating their animal welfare commitments into supplier contracts, providing targets for auditing and providing some public information about their supplier training. The company also scored the highest for a question referring to leading or co-leading joint initiatives within the industry, or with NGOs to protect wild animals in tourism.

TUI has worked with ABTA to create its animal welfare guidelines and the TUI Care Foundation has closely engaged with animal welfare NGOs. The Foundation has funded research into elephant tourism and defining good standards for elephant venues.

Support for other projects through the TUI Care Foundation were also declared publicly, but not scored. This is due to information on the type of support, targets or financial amounts given not being declared. Many companies may have been doing more, particularly in partnering with other organisations, but the targets, aims, and type of support offered was rarely made clear publicly.

Several organisations scored well for incorporating their policy into their supplier contracts, code of conduct, or terms. However, this could often have been made clearer within their animal welfare content. Many companies also lacked clarity on the exact targets or processes; this reduced their scores.

Overall, we recommend sharing commitments publicly of supplier processes as there is limited evidence of this. The public should know whether suppliers are offered training and what the processes are when guidelines are breached.

We also recommend organisations take further steps to support the industry to be more wildlife friendly as a whole. Where partnerships are made, organisations should publish the aim, the targets and the type of support provided.












Image: Tigers spend the day chained for tourist photos. The teeth of this one had also been clipped.



Section 4 – Changing consumer demand

This section assessed the companies' efforts to raise consumer awareness of animal welfare and to empower customers to make animal friendly travel choices.

Figure 5: Company rankings in 'Changing consumer demand' category

| Travel company | Overall | % Score |
|---|-----------|---------|
|  | Excellent | 80% |
|  | Very good | 63% |
|  | Good | 50% |
|  | Good | 50% |
|  | Fair | 43% |
|  | Fair | 33% |
|  | Poor | 23% |
|  | Very poor | 17% |
|  | Very poor | 17% |
|  | Very poor | 13% |
|  | Very poor | 13% |
|  | Very poor | 13% |
|  | Very poor | 13% |
|  | Failing | 7% |

Airbnb and Tripadvisor scored the highest when it came to consumer engagement. Companies scored well when they had a selection of educational content aimed at consumers. Providing multiple blog posts enabled the organisations to provide content relating to animal welfare in general and regarding the welfare of specific species.

Points were available for referencing or linking welfare content to experts, such as animal welfare NGOs or scientific studies. Organisations that did well also made the content accessible either through findable routes, or where customers would see it during their purchasing journey. The organisations that achieved high scores for this section also encouraged their consumers to raise animal welfare concerns and provided them with a dedicated contact or procedure to do so.

Typically, organisations that scored some points in this section had some animal welfare information available. Although this usually had to be identified through search engines, rather than being easily found on the companies' websites. More than half of the organisations scored 'poor', 'very poor' or 'failing' in this category. However, all scored some points as they provided contact information for customers wanting to raise animal welfare concerns.

Conclusion

The findings of 'Tracking the travel industry' show that several companies are leading the pack and taking commendable steps to become truly wildlife friendly.

Airbnb is the clear winner, achieving a 'very good' grade. The Travel Corporation, Tripadvisor, Booking.com and Viator are runners up with 'good' rankings. Some companies are only just beginning this journey while others are lagging far behind. Many have not acknowledged any of the responsibilities their companies and the whole industry have towards animal welfare.

There are several core problems identified by 'Tracking the travel industry'.

1.

Only half of the companies have developed animal welfare policies.

2.

Companies are generally not transparent about their animal welfare commitment targets.

3.

Companies are not publicly reporting performance against these targets.

4.

Companies are not as explicit as they could be about the standards set for their suppliers.

5.

Companies are not as good at raising awareness of animal welfare among consumers as they could be.

The travel industry plays a huge role in the continuation of captive wildlife entertainment by selling and promoting wildlife activities around the world. Research shows tourists are often unaware of the cruelty behind many captive wildlife attractions. By selling inhumane wildlife activities, reputable travel brands can promote a false sense that activities such as dolphin shows, elephant rides, elephant bathing and tiger petting, are acceptable. They are not.

The smart travel companies recognise that there are reputational and economic benefits to becoming a known leader in ethical travel.

The Covid-19 pandemic continues to be devastating for the travel industry. With it, however, comes the opportunity to build back better, as a resilient, responsible and sustainable tourism sector. Research shows, even before the pandemic, that customers are increasingly concerned with welfare issues. Eighty five percent of tourists interviewed in our 2019 global poll believed that tour operators should avoid activities that cause wild animals suffering.¹³

When companies are transparent in their wildlife policies, publicly state their intentions and report on their progress, customers take notice. Transparency between companies and consumers encourages trust. Taking a strong stance against animal cruelty gives companies a strong market position.

Travel organisations need to take responsibility for not only fulfilling consumer demand for wildlife attractions but creating it. While some wildlife attractions, such as marine theme parks, are attempting to 'future-proof' themselves because of already changing trends and attitudes, travel organisations need to be more proactive. For the sake of the wildlife languishing in captivity, travel organisations cannot afford to wait for consumer tastes to change while continuing to promote cruel wildlife tourism venues.

We applaud those companies who have already taken steps to disassociate themselves from inhumane wildlife attractions. For example, Airbnb, Booking.com, The Travel Corporation, Tripadvisor, Viator, and non-assessed companies including Virgin Holidays and British Airways Holidays, have taken a stance against dolphin entertainment. By taking a strong ethical stance against this cruelty, they have shown the travel industry and members of the public the unacceptability of keeping wild animals captive for entertainment.

The smart travel companies recognise that there are reputational and economic benefits to becoming a known leader in ethical travel.



What can the public do?

The public has the power to stop the exploitation of wildlife in several ways. Consumers can make a huge difference by not buying tickets and by advising travel companies that they disapprove of their involvement in the captive wildlife entertainment industry. Decreasing the sales of tickets decreases the economic incentive to breed and capture more wildlife. This then reduces the number of wild animals facing a lifetime of suffering in captivity.

Image: In 2018 - 2019, World Animal Protection worked with Happy Elephant Valley in Chiang Mai, Thailand to transition them into a high welfare venue, now renamed 'Chang Chill'. Tourists visiting the venue are able to observe elephants foraging in the forest, and playing in the mud pit from a viewing platform. They can also take part in cooking classes, and help prepare food, medicines, and supplements which are fed to the elephants through feeding tubes. Tourists also learn more about mahouts (elephant care takers) and gain a better understanding into generations of people who have cared for elephants in Thailand.

Recommendations

Companies have been provided full reports on their performance and tailored advice on how to increase their score in future assessments and move further towards wildlife friendliness. Recommendations regarding how all unassessed travel companies can become truly wildlife friendly follow below.



Commitment

Companies should have a public animal welfare policy recognising the following:

- | | | | |
|--|--|---|---|
| <ul style="list-style-type: none"> Animals are best seen in the wild. | <ul style="list-style-type: none"> Animals in captivity must have positive experiences - 'a good life'. | <ul style="list-style-type: none"> The Five Domains or the Five Freedoms of animal welfare are critical concepts to provide better conditions for animals. | <ul style="list-style-type: none"> The travel industry has a role towards protecting wildlife. |
|--|--|---|---|

Travel companies should assess their offers for harmful wildlife activities and remove them. This includes direct contact with captive wild animals; animal performances, fights and races.

Companies should publicly require specific certifications, guidelines or accreditations that experiences or attractions involving wild animals must follow as a minimum to be acceptable. This should be in addition to not offering unacceptable activities such as direct contact, performances, fights and races. For example, accredited or membership body affiliated zoos/aquaria, Global Federation of Animal Sanctuaries (GFAS) certified sanctuaries and World Cetacean Alliance (WCA) certified wild whale watching.

Companies should view as unacceptable, visits to facilities where wild animals are bred for commercial purposes.



Targets and performance

| | |
|-------------|--|
| Targets | Companies should publicly set time-bound targets to end selling or promoting experiences or attractions that allow close or direct tourist contact with wild animals, and animal performances, fights and races. |
| | Companies should publicly set time-bound targets to only sell or promote experiences and attractions which have specific certifications, guidelines or accreditations and which only offer acceptable practices involving animals. |
| Performance | Companies should publicly report on their performance in meeting the targets above. |
| | Companies should publicly report on the number or % of excursions, tickets sold and offers involving wild animals so the public can see progress. |



Changing industry supply

| | |
|-----------|---|
| Suppliers | Companies should incorporate their animal welfare policy and commitments as part of their binding contracts with suppliers. They should prohibit experiences or attractions involving practices with wild animals which are unacceptable and highlight policies which must be followed to make activities acceptable. |
| | Companies should audit suppliers' performance against the animal welfare conditions stated in their contracts and have a procedure to correct suppliers if they fail to meet standards. |
| | Companies should develop mechanisms to engage suppliers in best practices, such as raising awareness and providing training. |
| Industry | <p>Companies should lead or co-lead joint initiatives within the industry, or with NGOs (non-governmental organisations) to protect wild animals in tourism. Eg:</p> <ul style="list-style-type: none">• working with other travel industry bodies to develop standards or guidelines• advocating for reformed regulations• developing open resources such as training modules, audit tools partnering with NGOs by providing funding and/or expertise. |



Changing consumer demand

Companies should use content that references or links to evidence and experts to raise awareness and change customers' attitudes and behaviour towards wildlife tourism activities and attractions.

Companies should provide consumers with resources to identify ethical activities and attractions involving wild animals.

Companies should provide animal welfare content information where it is findable by consumers through an intuitive path on their user booking journey and on product pages. The content should be easy to 'discover' when users are not looking for it.

Companies should encourage customers to raise animal welfare concerns or queries with them and provide an easy way to do so.

Appendix 1

10 steps to become wildlife-friendly

Protecting wildlife protects people and jobs. The outbreak of Covid-19 has shone a harsh spotlight on how people treat wild animals. The pandemic has challenged us to create change and provided an unprecedented opportunity to rebuild the tourism industry to be more resilient and responsible by becoming wildlife-friendly.

As a member of the travel industry, you can help prevent another pandemic, secure livelihoods and help keep wild animals in the wild by integrating animal welfare into your company's business values and actions. This involves phasing out wildlife entertainment from your supply chain and offering responsible tourist experiences instead. Together we can ensure that this generation of captive wildlife is the last to suffer for commercial gain.

1. **Commit to animal welfare** by taking World Animal Protection's Wildlife-Friendly pledge. Consider communicating this intent to your customers and the public to encourage a wider shift towards more ethical wildlife tourism.
2. **Assemble a group** of enthusiastic colleagues who are interested in leading organisational changes to embed animal welfare into your company's business operations.
3. **Review your animal-related product offerings.** Activities that negatively impact animal welfare and the conservation of species in the wild, and that can be of high risk to the health and safety of your travellers include direct interaction with wild animals and wild animals performing. World Animal Protection can provide you with guidance and checklists to identify red flags in your supply chain and remove them.
4. **Assess the value of these activities** to customers and start to look for non-animal and ethical animal alternatives, such as watching animals from a safe and respectful distance in their natural habitats or at a true sanctuary where the animals are not bred or traded.
5. **Start conversations with your suppliers.** Help them understand that change is needed, and you are looking for responsible alternatives to replace wildlife entertainment activities. Keep in mind: while ethical experiences exist, a company like yours can help phase out wildlife entertainment by asking ground suppliers to stop commercial breeding and trade while improving the conditions of those animals already in captivity.
6. **Develop an animal welfare policy** and ask suppliers to plan a phase out of any activities and attractions that are no longer acceptable as part of your product offers. A good policy will help ensure you are assessing animal-based tourism consistently with the latest scientific information and mitigate the risk of being criticized for not doing enough. World Animal Protection can provide support.
7. **Train staff on animal welfare** and how to identify cruel attractions and activities, as well as truly ethical wildlife experiences. World Animal Protection has training modules, checklists and research that will allow your staff to own your company's animal welfare policy, assess suppliers, and select exciting and responsible alternatives.
8. **Speak out about your company's commitment** to animal welfare and educate your customers on how to be an animal-friendly traveller wherever they go. Education is vital to shift demand towards responsible tourism. World Animal Protection has numerous educational materials, such as tips on how to be an elephant-friendly traveller.
9. **Join forces with other travel leaders** to build back a responsible and resilient travel industry by creating and promoting truly ethical alternatives which together with reducing demand will lead to a gradual phase out of captive use of wild animals for tourism entertainment. Contact World Animal Protection to learn more about the Coalition for Ethical Wildlife Tourism.
10. **Annually reevaluate, monitor and report on your animal welfare strategy.** We encourage you to continue to update and improve your policy and ensure it's being fully implemented across your organisation and supply chain.

Appendix 2

How to draft an animal welfare policy

Be part of the change

Covid-19 has challenged us to create change. The pandemic has shone a harsh spotlight on how people treat wild animals. The catastrophic impact of wildlife exploitation has impacted our health, worldwide economies, the planet and the travel industry, in addition to causing the suffering of millions of animals worldwide. There can be no going back to what once was.

Sixty percent of emerging infectious diseases are zoonotic (originate from animals), with over 70 percent of these thought to originate from wild animals.¹ The demand for and exploitation of wild animals exposes us to diseases like Covid-19, putting us all at risk.

Considering that wildlife tourist attractions account for a large proportion (up to 40%) of tourism outlines the need to address the increasing demand of people searching for wildlife encounters as part of their 'once in a lifetime' holiday experience.² When done responsibly these encounters can play a major role in protecting wildlife and their natural habitats. Unfortunately we know that most wildlife tourism takes place in captivity where as a result up to half a million wild animals suffer to entertain tourist around the world.³ Animals at these wildlife attractions are either taken from the wild or bred in captivity so tourists can take a tiger selfie, swim with a dolphin, or ride or wash an elephant, driving a multi-billion dollar global trade in wild animals.

As a member of the travel industry, you can help prevent another pandemic, secure livelihoods and help keep wild animals in the wild by becoming a wildlife-friendly travel company. This involves phasing out wildlife entertainment from your supply chain and offering responsible tourist experiences instead.

Now is the time for travel companies like yours to rebuild the tourism industry to be more resilient and responsible by integrating animal welfare into company business mission and actions.

Purpose, scope and disclaimer

This toolkit has been created to support companies like yours in drafting a robust animal welfare policy and guiding you in adopting more ethical practices concerning animals, in particular wildlife.

As wildlife encounters are amongst the most popular holiday experience, most of the principles and guidelines that are recommended in this document relate to wild animals, whether in captivity or in the wild. This doesn't mean though that ensuring good welfare for domesticated animals is any less important.

Adopting an animal welfare policy based on this guidance document must not be considered as a certification or in any other way an endorsement by World Animal Protection of your company's animal related practices. The content of this policy guidance should be customised to be relevant for your company.

You can reach out to World Animal Protection if you wish to receive more information or any further support or materials, such as staff training, checklists or customer education. Email us at tourism@worldanimalprotection.org.

What is wildlife entertainment and why is it unacceptable?

There are certain tourist attractions with animals that are simply unacceptable as they will never meet the animals' most basic welfare needs. Wildlife entertainment is one of these particularly worrying types of attractions.

Activities and attractions that are considered wildlife entertainment are those that allow tourists to have close contact with wild animals or see the animal(s) perform. In addition to the entertainment being demeaning, the suffering starts from the moment the animals are captured from the wild or bred in captivity.

In most cases young animals are prematurely separated from their mothers and exposed to harsh training, causing physical and psychological damage. This exploitation and abuse exacerbate the stress and discomfort they experience for the rest of their lives while living in unsuitable conditions at entertainment venues. All solely for commercial gain.

Review current offers first

Before drafting an animal welfare policy it's recommended that an initial review of the products and experiences involving (wild) animals is undertaken. The following questions can help when reviewing animal related products.

- Are wild animals required to perform in shows? Eg orangutans who re-enact kick-boxing matches, elephants and dolphins who perform tricks.
- Are visitors allowed to hold, touch or directly interact with wild animals? Eg tiger (cub) selfies, walking with lions, riding an elephant or an ostrich or swim-with-dolphin experiences.

If the answer is "yes" to one or both of these questions, there is a high risk these activities have negative impacts on animal welfare and the conservation of the species in the wild.

How to draft an animal welfare policy

A robust animal welfare policy consists of two parts.

- Your company's mission and values in relation to animal welfare. These will not have an immediate impact on the animals in your company's supply chain, but they serve as a frame of reference and a way to put forward principles that will accompany the organisation wherever and whatever business is done.
- Your company's commitment sets out guidelines in which your mission and values are translated into concrete practices, outlining what's acceptable and what's not.

Essential animal welfare principles to recognise

- That the travel industry plays a key role in steering demand away from cruel wildlife experiences, encouraging improving conditions for existing captive wild animals and asking suppliers to end commercial breeding and trade to ensure this is the last generation of captive wildlife used for entertainment.
- That all animals must be respected for their intrinsic value and that the best way to experience animals whilst on holiday is by seeing them in the wild.
- That when under human care animals must have a good life by enjoying good physical and mental health. That they should be provided with an environment and conditions that prevent suffering, and also enable positive experiences, with the ability to make choices and express the widest possible range of natural behaviours.
- That the unique needs of wild animals in particular can never be fully met in captive environments. That where wild animals are kept in captive conditions they must be provided with the best possible welfare and not be held captive for entertainment purposes.
- That your company will only work with suppliers if the animals under their care have the highest possible welfare in line with the Five Domains of Animal Welfare:
 1. Nutrition – factors that involve the animal's access to sufficient, balanced, varied and clean food and water.
 2. Environment – factors that enable comfort through temperature, substrate, space, air, odour, noise and predictability.
 3. Health – factors that enable good health through absence of disease, injury, impairment and good fitness level.

4. Behaviour – factors that provide varied, novel and engaging environmental challenges through sensory inputs, exploration, foraging, bonding, playing, retreating and others.
5. Mental State – by presenting positive situations in the previous four functional domains, the mental state of the animal should benefit from predominantly positive states, such as pleasure, comfort or vitality, while reducing negative states such as fear, frustration, hunger, pain or boredom.

Essential guidelines outlining what and what not to offer

It's recommended that travel companies develop as part of an animal welfare policy, clear guidelines that set out acceptable and unacceptable activities.

We recommend to not sell or promote venues and/or activities that offer tourists any of the following experiences:

- close interaction with wild animals, such as touching or riding, including but not limited to elephant riding and bathing, swimming with dolphins or walking with lion
- watching wild animal performances, including but not limited to dolphin shows, circuses, orangutan boxing
- photo opportunities with wild animals, including, but not limited to big cats, sloths, or primates, tiger selfies, dolphin kissing, or selfies with orangutans
- watching animals fight or race, or being used in other sports or cultural events that cause animals to suffer or die, including but not limited to bullfighting and running, crocodile wrestling, dog fighting, rodeos, elephant polo and horse or dog racing
- visiting facilities where captive wild animals are bred and kept for commercial products, including but not limited to crocodile farms, civet coffee farms, bear bile farms, turtle farms
- consuming food that has caused extreme animal suffering and/or that threatens the survival of species in the wild, including bush meat, foie gras, tiger wine, bear bile, shark fin, whale meat, turtle meat, snake blood and civet coffee (kopi Luwak)
- buying souvenirs made from wild animal parts, such as bags made out of crocodile or snake-skin, jewellery made out coral, ivory, tortoise shells
- engaging in any form of hunting, including trophy and canned hunting or sport fishing.

When not in conflict with any of the above guidelines, the following venues and activities where tourists can experience animals can be offered and/or promoted:

- Genuine wildlife sanctuaries, rehabilitation facilities and rescue centres that have the highest possible standards of animal care and where there is no breeding for commercial purposes – eg sanctuaries certified by the [Global Federation of Animal Sanctuaries \(GFAS\)](#) or elephant venues following World Animal Protection's [Elephant-Friendly venue guidelines](#). For further guidance on how to recognise a genuine wildlife sanctuary, see [World Animal Protection's checklist](#).
- Responsible wildlife watching where tourists observe animals in their natural environment from a safe and respectful distance without luring or chasing them or in other ways interrupting their natural behaviours or routines – eg whale watching operators and destinations (Whale Heritage Sites) certified by the [World Cetacean Alliance \(WCA\)](#).
- Zoos and aquariums that are members of the World Association of Zoos and Aquariums (WAZA) and national zoo and aquarium accrediting bodies which do not hold cetaceans in captivity and do not use wild animals for direct contact activities with visitors or have them perform in shows. (Keep in mind that these accreditation/affiliations alone can't be relied on as a measure of good welfare.)

Implementation, monitoring and evaluation

In order for your company's animal welfare policy to be fully implemented across your organisation we encourage you to set clear objectives with timebound targets so progress can be monitored and reported.

As part of implementing the policy your company should ensure suppliers understand the policy, how they can guarantee compliance and what the processes are for when they don't.

Awareness raising through education is another essential part of ensuring the policy becomes fully entrenched into your daily business operation. Training and checklists can be provided to staff and suppliers, and customers too should be empowered to recognise and report on good and bad animal practices.

Last but not least, we strongly recommend you evaluate your company's animal welfare policy on a regular basis to allow for updates and improvements based on the latest research, evidence and expertise.

Image: Whale Heritage Sites are accredited destinations that implement and celebrate responsible whale and dolphin watching. They provide the travel industry and tourists with a clear opportunity to choose responsible alternatives to captive dolphin venues and support best practice dolphin-watching. In July 2020, World Cetacean Alliance and World Animal Protection announced that Franja Marina Teno-Rasca in South Tenerife became a candidate Whale Heritage Site. This means that the destination is working towards being accredited to join a growing list of locations, as a world class responsible whale and dolphin watching destination.



Appendix 3

Ready-to-go animal welfare policy template

[Company name]'s Animal Welfare Policy

[Company name] is committed to responsible tourism and protecting animals who are impacted by the travel industry. We have developed this animal welfare policy as animal encounters have become increasingly popular as part of people's holiday experiences. However, some animal related activities, such as elephant rides, photo opportunities with tigers or watching dolphins perform, lead to suffering through cruel treatment and inhumane conditions.

[Company name] believes that all animals should be respected for their intrinsic value and that the best way to experience animals whilst on holiday is by seeing them in the wild. When under human care, both domesticated⁶ and non-domesticated (wild) animals, must have 'a good life' by enjoying good physical and mental health. The conditions they are provided must favour positive experiences over negative ones within an environment that encourages making choices and enables them to express the widest possible range of natural behaviours.

[Company name] only works with suppliers if the animals under their care are provided with the highest possible welfare in line with the Five Domains of Animal Welfare⁷:

1. **Nutrition** - factors that involve the animal's access to sufficient, balanced, varied and clean food and water.
2. **Environment** - factors that enable comfort through temperature, substrate, space, air, odour, noise and predictability.
3. **Health** - factors that enable good health through absence of disease, injury, impairment and good fitness level.
4. **Behaviour** - factors that provide varied, novel and engaging environmental challenges through sensory inputs, exploration, foraging, bonding, playing, retreating and others.
5. **Mental State** - by presenting positive situations in the previous four functional domains, the mental state of the animal should benefit from predominantly positive states, such as pleasure, comfort or vitality, while reducing negative states such as fear, frustration, hunger, pain or boredom.

[Company name] also recognises that the needs of wild animals in particular can never be fully met in captivity. Where wild animals are kept in captivity the facility must not only provide them with best possible welfare conditions, it must also contribute towards a shift away from exploitative practices and be supportive of phasing out keeping wild animals for commercial purposes.

Our guidelines

At [Company name], we do not sell or promote venues and/or activities that offer tourists any of the following experiences.

- Close interaction with wild animals, such as, touching or riding, including but not limited to elephant riding and bathing, swimming with dolphins or walking with lions
- Watching wild animal performances, including but not limited to dolphin shows, circuses, orangutan boxing
- Photo opportunities with wild animals, including, but not limited to big cats, sloths, or primates, tiger selfies, dolphin kissing, or selfies with orangutans
- Watching animals fight or race, or being used in other sport or cultural events that cause animals to suffer or die, including but not limited to bullfighting and running, crocodile wrestling, dog fighting, rodeo, elephant polo and horse racing
- Visiting facilities where captive wild animals are bred and kept for commercial products, including but not limited to crocodile farms, civet coffee farms, bear bile farms, turtle farms
- Engaging in trophy, canned hunting or sport fishing.

When not in conflict with any of the above guidelines [Company name] does offer and/or promotes the following venues and activities where tourist can experience animals.

- Genuine animal sanctuaries, rehabilitation facilities and rescue centres that have the highest possible standards of animal care - eg sanctuaries certified by the [Global Federation of Animal Sanctuaries \(GFAS\)](#) or elephant venues following World Animal Protection's [Elephant-Friendly venue guidelines](#). For further guidance on how to recognise a genuine wildlife sanctuary, see [World Animal Protection's checklist](#).
- Responsible, wildlife watching where a visitor can observe animals in their natural environment from a suitable distance without interrupting their natural behaviours or disturbing their routines - eg whale watching experiences certified by the [World Cetacean Alliance \(WCA\)](#).
- Zoos and aquariums that are members of the World Association of Zoos and Aquariums (WAZA) and national zoo and aquarium accrediting bodies which do not hold cetaceans in captivity and do not use wild animals for direct contact activities with visitors or have them perform in show. (Keep in mind that these accreditation/affiliations alone can't be relied on as a measure of good welfare and advice from independent animal welfare experts should be sought.)

Appendix 4

Individual company report summaries and selection rationale for 2020

Data was gathered during June and July 2020 and reflects the available public information at the time. We recognise, however, that many companies have been affected by Covid-19 and as such their rankings on source websites may have changed since.

| | | | |
|-----|--|------|--|
| 4.1 |  | 4.8 |  |
| 4.2 |  <small>Formerly Attraction Tickets Direct</small> | 4.9 |  |
| 4.3 |  | 4.10 |  |
| 4.4 |  | 4.11 |  Tripadvisor. |
| 4.5 |  | 4.12 |  TUI.co.uk |
| 4.6 |  | 4.13 |  |
| 4.7 |  | 4.14 |  |

4.1 Airbnb

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|---|------------------|------------|------------|-------------------------|--------------------------|--------------------------|
| 1 st |  airbnb | Very good | 68% | 77% | 69% | 40% | 80% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • Policy refers to Five Freedoms and animals having positive experiences. • Direct contact with wild animals in the wild is prohibited, for all animals except those in ‘social impact experiences’, which claim to have a benefit for conservation. For wild animals in captivity direct contact is also prohibited for rescues and sanctuaries, zoos and aquariums, cafes and entertainment venues, and for elephants, big cats and marine mammals. • Animal performances, fights, races are classed as unacceptable for all animals. • Airbnb requires AZA and WAZA affiliation for residual venues not offering direct contact and performances, and guidelines have been set for rescues and sanctuaries. • Airbnb considers visiting facilities where wild animals are bred for commercial purposes as unacceptable for all wild animals and do not allow experiences involving purchase or consumption of wildlife products. • The scope of the animal welfare policy applies to all brands, subsidiaries and products. |
| Improvement areas | <p>Airbnb should:</p> <ul style="list-style-type: none"> • acknowledge the role the travel industry plays in protecting wildlife, and that animals deserve a ‘good life’ with positive experiences • continue to carefully monitor ‘social impact experiences’ and ensure no unacceptable activities with truly wild animals are permitted. Where direct interaction with hybrids (eg wolfdogs) is permitted, Airbnb should ensure that the hybrids are legally classed as domesticated species. The origins of wild-hybrids must be confirmed with suppliers to ensure no breeding is taking place. It should be made clear to customers that any hybrids are legally domesticated species, to avoid giving the impression that direct contact with wild animals is acceptable • publicly disclose any guideline/certification requirements for responsible wildlife watching in the wild. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • The policy’s requirements on direct contact, performances, fights and races, commercial breeding and accreditation/certification have already been fully implemented. • All Airbnb suppliers/hosts are bound to adhere to the animal welfare guidelines. |
| Improvement areas | <p>Airbnb should:</p> <ul style="list-style-type: none"> • publicly report on the breakdown of animal excursions offered • make it clearer, publicly, that the policy is fully implemented. |

4.1 Airbnb

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Airbnb have contributed to several industry initiatives and in awareness raising. Airbnb have also worked in partnership with NGOs such as PETA and World Animal Protection. |
| Improvement areas | <p>Airbnb should:</p> <ul style="list-style-type: none"> provide further evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance within industry/NGO partnerships, the goal and targets of the partnership should be clearly stated and if the organisation is contributing through donations the monetary amount must be declared provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training. |

4. Changing consumer demand

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> Airbnb informs consumers about the welfare and conservation concerns behind wildlife entertainment attractions, in content such as "How can I recognise elephant-friendly venues?" and "Why is it harmful to wildlife to keep marine mammals in captivity?". Animal welfare content can be found through one intuitive click of the site map. Customers can write and publish reviews - both good and bad - without curation. Airbnb encourages customers to report animal welfare concerns and provide a generic contact to do so. Guests can leave a private review directly to Airbnb that address welfare concerns. Customers can leave feedback related to "Abuse or physical harm", "Poor living conditions", and "Other". |
| Improvement areas | <p>Airbnb should:</p> <ul style="list-style-type: none"> provide consumer content that exemplifies good tourist behaviour and covers the change in tourist demand, supported by links or references - eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provide animal welfare content through a navigational menu, footer or home page, directly or via one click. |

Selection Rationale


SimilarWeb 2020 global travel rank: #2; global market share of online listings: #4 / 6%¹⁴

Airbnb is the largest independent home-sharing platform by market share (27% of the US\$101bn global short-term rental sector, 2018). In 2018 it was on course for 1m tours and activities bookings in 2019 and becoming the number one brand valuation in the world at US\$10,498m.¹⁵

"Airbnb has its sights set on local activities with its Experiences platform. After launching the product in late 2016, Airbnb plans to invest US\$5m in the Experiences product in 2018, expanding its offerings to 200 cities in the USA alone."¹⁶

Airbnb has openly stated its ambitions to lead in experience bookings: "We are seeing the growth in experiences to be even faster than the growth of our personal home visits because we already have a really engaged travel audience that wants to have a real local experience."¹⁷

4.2 AttractionTickets.com

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|---|-----------|-----|------------|-------------------------|--------------------------|--------------------------|
| 2 nd |  | Very poor | 13% | 17% | 0% | 7% | 23% |

1. Commitment

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> AttractionTickets.com have an animal welfare policy and recognise the role of the travel industry in protecting wildlife. The DoSomethingDifferent.com brand signed World Animal Protection's elephant-friendly pledge not to sell, offer or promote venues or activities involving elephant rides and shows. Venues offered are said to meet recognised accreditation bodies and basic legal requirements. |
| Improvement areas | <p>AttractionTickets.com should:</p> <ul style="list-style-type: none"> acknowledge the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences and that that animals are best seen in the wild consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants as unacceptable consider performances, fights and races as unacceptable for all wild animals, or for all animals - with no exceptions made for performances based on 'natural' behaviour remove any accredited venues from their offerings if they offer unacceptable activities provide evidence that the company considers visiting facilities where wild animals are bred for commercial purposes as unacceptable, whether for all wild animals or specific species provide clear messaging as to whether the whole policy and all commitments apply to the whole group, including of all brands and/or subsidiaries and to all products offered or promoted. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>AttractionTickets.com should:</p> <ul style="list-style-type: none"> provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines provide public evidence of progress towards any policy implementation targets publicly report on the breakdown of animal excursions offered. |

4.2 AttractionTickets.com

3. Changing industry supply

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none">• A list of non-compliant suppliers/venues which were removed from the company's offerings is displayed publicly, indicating a review process and some willingness to remove non-compliant suppliers/venues. |
| Improvement areas | <p>AttractionTickets.com should:</p> <ul style="list-style-type: none">• confirm the animal welfare policy is incorporated into all supplier contracts• provide further evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance• provide public evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training• provide public evidence that AttractionTickets.com has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none">• The animal welfare policy can be found through one intuitive click of the footer.• Curated customer reviews/feedback - both good and bad - are featured on product pages.• A generic contact is provided where customers could raise animal welfare concerns. |
| Improvement areas | <p>AttractionTickets.com should:</p> <ul style="list-style-type: none">• provide content that informs about the welfare and conservation concerns behind wildlife entertainment attractions; provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity; reports evidence of change in tourists' demands towards ethical wildlife experiences; changes attitudes by exemplifying the tangible impact of ethical wildlife attractions and how animals and visitors benefit from responsible wildlife tourist attractions. Content should supported by links or references - eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs• provide animal welfare content through the site map, a navigational menu or home page, directly or via one click• clearly signpost excursions that involve animals on the product page• allow customers to publish free text reviews of the products on the product pages• encourage customers to raise animal welfare concerns and provide a dedicated contact to do so. |

Selection Rationale

AttractionTickets.com is the main brand of ATD Travel Services, founded in 2002 and has since sold tickets to 4 million customers.¹⁸

In 2006, it became the first company ever to sell 1 million visits to Walt Disney World in Florida in a single year - a feat achieved every year since.¹⁹ It is now the UK's largest attraction ticket provider for Walt Disney World, SeaWorld, Universal Orlando and Disneyland Paris.

4.3 Booking.com

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|----------------|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| 2 nd | Booking.com | Good | 48% | 67% | 64% | 10% | 33% |

1. Commitment

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Policy refers to Five Freedoms and recognises the role of the travel industry in protecting wildlife. Direct contact with the following wild animals is prohibited: dolphins (including orcas); whales and porpoises; elephants; bears; big cats (including but not limited to lions, tigers, leopards and cheetahs); orangutans and other primates; sloths. Animal performances, fights, races are classed as unacceptable for the species previously mentioned. Booking.com requires WAZA, EAZA or AIZA affiliation for residual venues not offering direct contact and performances, and unspecified 'responsible' guidelines are mentioned for eco-tours, wild dolphin and whale watching experiences and safaris. Booking.com considers visiting facilities where wild animals are bred for commercial purposes as unacceptable for all wild animals. The scope of the animal welfare policy applies to all but one sub-brand and two sister brands. |
| Improvement areas | <p>Booking.com should:</p> <ul style="list-style-type: none"> acknowledge publicly that animals are best seen in the wild and that animals deserve a 'good life' with positive experiences consider direct contact with wild animals of all species as unacceptable consider performances, fights and races with all wild animals, or all animals as unacceptable set and publicly disclose specific guideline/certification requirements for all responsible wildlife watching at sanctuaries and in the wild roll out the implementation of the commitment across the remaining sub-brand and two sister brands as per internal targets. |

2. Targets and performance

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> The policy's requirements on direct contact, performances, fights and races, commercial breeding and accreditation/certification have already been fully implemented within Booking.com. |
| Improvement areas | <p>Booking.com should:</p> <ul style="list-style-type: none"> publicly report on the breakdown of animal excursions offered make it clearer, publicly, that the policy is fully implemented within Booking.com. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> • Booking.com outlines criteria that are prohibited/have to be met in order for suppliers to be contracted, though this is not incorporated into contracts. • Booking.com has spoken out in support of movements and organisations sharing information about initiatives within their 2019 sustainability update. |
| Improvement areas | <p>Booking.com should:</p> <ul style="list-style-type: none"> • incorporate their animal welfare policy into binding supplier contracts • provide public evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance • provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training. |

4. Changing consumer demand

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • Booking.com informs consumers about the welfare and conservation concerns behind wildlife entertainment attractions, as well as reporting evidence of change in tourists' demands towards ethical wildlife experiences. Content is supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs. • Animal welfare content can be found through a browser search and through a search on a partner page. • Customers can write and publish reviews – both good and bad – without curation. |
| Improvement areas | <p>Booking.com should:</p> <ul style="list-style-type: none"> • provide content that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity; changes attitudes by exemplifying the tangible impact of ethical wildlife attractions and how animals and visitors benefit from responsible wildlife tourist attractions. Content should be supported by links or references as described above • provide customers with the knowledge needed to recognise ethical activities through content such as 'top tips', 'how to' articles, blogs and/or videos, or similar • provide animal welfare content through a navigational menu, footer, site map or home page, directly, or via one click • signpost on the product page that the excursion involves animals, with a link to animal welfare content from the product page and the terms and conditions • publicly encourage customers to report animal welfare concerns and provide a dedicated contact to do so; remove the need to log in to access the 'help centre'. |


Selection Rationale

2019 Travel Weekly Powerlist: #2; Alexa 2020 travel rank: #1; SimilarWeb 2020: travel rank #1.

Booking.com is the primary website of Booking Holdings, the world's second largest travel group.²⁰ Booking Holdings' had US\$92.7bn gross travel bookings in 2018,²¹ US\$14.53bn revenue,²² was on course for 1m tours and activities bookings in 2019, and a brand valuation of US\$10,196m in 2020.²³

Booking Holdings owns a number of key consumer travel companies including priceline.com, agoda.com, Kayak and Momondo Group. It also "signaled its intentions to capture a share of the growing tours and activities pie with its April 2018 purchase of FareHarbor, a tours and activities software company."²⁴ In recognising "the largest competitor of our attractions business currently has more than 40 times the number of attractions we do", Booking.com is looking to partner with other key suppliers in the market, such as Musement²⁵ (now owned by TUI).

4.4 DER Touristik

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|---|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| 4 th |  | Fair | 35% | 53% | 0% | 50% | 17% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> Policy refers to Five Freedoms and recognises the role of the travel industry in protecting wildlife as well as that animals are best seen in the wild. DER Touristik follows ABTA's animal welfare guidelines, which include classing direct tourist contact or feeding of great apes, bears, crocodiles or alligators, sloths and orcas as unacceptable; classing elephant shows and performances, plus direct contact or feeding of elephants without a barrier as unacceptable. The scope of the animal welfare policy applies to all brands. |
| Improvement areas | <p>DER Touristik should:</p> <ul style="list-style-type: none"> acknowledge publicly that animals deserve a 'good life' with positive experiences consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants, unacceptable consider performances, fights and races with all wild animals, or all animals as unacceptable consider visiting facilities where animals are bred for commercial purposes as unacceptable for wild animals of all species, or at least cetaceans, big cats and elephants, in addition to sanctuaries set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences remove any accredited venues from their offerings if they offer unacceptable activities. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>DER Touristik should:</p> <ul style="list-style-type: none"> provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines provide public evidence of progress towards any policy implementation targets publicly report on the breakdown of animal excursions offered. |

3. Changing industry supply

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • DER Touristik have a binding animal welfare policy and the supplier code of conduct states suppliers must meet minimum requirements for keeping animals in appropriate conditions, as laid out by ABTA guidelines. • DER Touristik have evidence of some general supplier support programs and training. • DER Touristik partners with NGOs providing expertise and funding through the DER Touristik foundation. |
| Improvement areas | <p>DER Touristik should:</p> <ul style="list-style-type: none"> • provide public evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance • provide evidence of the company engaging suppliers/hosts in best practices by providing incentivised and/or required training. |

4. Changing consumer demand

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • There is some evidence that DER Touristik promote watching animals in the wild. • Animal welfare content can be found through one click on the DER Tour website footer and through one click on the DER Touristik navigational menu. • A generic contact is provided where customers could raise animal welfare concerns. |
| Improvement areas | <p>DER Touristik should:</p> <ul style="list-style-type: none"> • provide consumer content that informs about the welfare and conservation concerns behind wildlife entertainment attractions; that reports evidence of change in tourists' demands towards ethical wildlife experiences; that explains how the welfare needs of wild animals can never be fully met in captivity, and that changes tourist attitudes and shows how animals and visitors benefit from responsible wildlife tourist attractions. Content should be supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs • provide customers with the knowledge needed to recognise ethical activities through content such as 'top tips', 'how to' articles, blogs and/or videos or similar • provide animal welfare content through a navigational menu, footer, site map or home page, directly or via one click on relevant sites • signpost on the product page that the excursion involves animals, with a link to animal welfare content from the product page and the terms and conditions • allow customers to publish free text reviews of the products on the product pages • encourage customers to report animal welfare concerns and provide a dedicated contact to do so. |

Selection Rationale


€6.7bn revenue with 9.9 million guests annually.

"Europe's third-largest tourism group", even before the demise of Thomas Cook, DER Touristik comprises approximately 130 travel brands, in 16 countries. It includes 2,800 travel agencies with 9.9 million guests annually.

It has 17 big name trademarks such as Dertour and Kuoni. It also has 30 travel specialists – market leaders in many cases – such as Kirker or Manta Reisen, which focus on "special and challenging target groups".²⁶

For this study, information was taken from the DER Touristik English website. Where the questions require information relating to the customer booking platform the brand DERTOUR was used.

4.5 Expedia

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|---|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| 5 th |  | Poor | 22% | 27% | 0% | 7% | 50% |

1. Commitment

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Policy refers to similar criteria to Five Freedoms, recognises that animals should have a good life with a predominance of positive emotional states and recognises the role of the travel industry in protecting wildlife Expedia will only work with accredited WAZA members, accredited AMMPA members or members of regionally recognised accrediting bodies. The scope of the animal welfare policy applies to Expedia Group as a whole. |
| Improvement areas | <p>Expedia should:</p> <ul style="list-style-type: none"> acknowledge publicly that animals are best seen in the wild consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants unacceptable consider performances, fights and races as unacceptable for all wild animals, or for all animals remove any accredited venues from their offerings if they offer unacceptable activities consider visiting facilities where animals are bred for commercial purposes as unacceptable for wild animals of all species, or at least cetaceans, big cats and elephants, in addition to at sanctuaries set and publicly disclose specific guideline/certification requirements for sanctuaries and wild watching experiences. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>Expedia should:</p> <ul style="list-style-type: none"> provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines provide public evidence of progress towards any policy implementation targets publicly report on the breakdown of animal excursions offered. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Expedia outlines criteria that are prohibited/have to be met in order for suppliers to be contracted, though this is not incorporated into binding contracts. |
| Improvement areas | <p>Expedia should:</p> <ul style="list-style-type: none"> incorporate their animal welfare policy into binding supplier contracts provide public evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance provide evidence of the company engaging suppliers/hosts in best practices by providing incentivised and/or required training. |

4. Changing consumer demand

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> Expedia provides consumer content that informs about the welfare and conservation concerns behind wildlife entertainment attractions, provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, reports evidence of change in tourists' demands towards ethical wildlife experiences and changes attitudes by exemplifying the tangible impact of ethical wildlife attractions and how animals and visitors benefit from responsible wildlife tourist attractions. Animal welfare content can be found through a browser search. Customer reviews/feedback - both good and bad - are featured on product pages. The product page states when products feature animals with a link to animal welfare content. A generic contact is provided where customers could raise animal welfare concerns. |
| Improvement areas | <p>Expedia should:</p> <ul style="list-style-type: none"> provide customers with knowledge needed to identify ethical activities and attractions involving specific wild animals such as elephants, cetaceans and big cats provide animal welfare content through a navigational menu, footer, site map or home page, directly or via one intuitive click link to animal welfare content from the T&Cs and feature in a clear button or banner allow customers to publish free text reviews without editing; encourage them to report animal welfare concerns and provide a dedicated contact to do so. |

Selection Rationale

2019 Travel Weekly Powerlist: #1; Alexa2020 travel rank: #5-7; SimilarWeb 2020: travel rank #7; Global market share of online listings: #3 / 12%.²⁷

Expedia had US\$99bn sales in 2018,²⁸ US\$11bn revenue,²⁹ and a brand valuation of US\$3,451m in 2020.³⁰

Expedia.com is the primary website of Expedia Group, the largest earning travel group.³¹

A recognised leader in the industry, Expedia Local Expert is a leading provider of activities and experiences to more than 2,000 destinations worldwide. It offers expertise and assistance in booking events, activities, tours, attractions, ground transportation and other services.

Through its Local Expert and Things to Do divisions, Expedia sold more than \$500 million in tours and activities in 2017,³² "with a strategy to more than quadruple that amount in the near future."³³

4.6 Flight Centre

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|----------------------|-----------|-----|------------|-------------------------|--------------------------|--------------------------|
| 6 th | FLIGHT CENTRE | Very poor | 15% | 30% | 0% | 0% | 17% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • Within Flight Centre's Responsible Travel Charter, animal welfare is outlined as one of the 'four pillars'. • Flight Centre state they are conducting product reviews to ensure that practices classed as unacceptable to ABTA are not sold. ABTA's animal welfare guidelines include classing direct tourist contact or feeding of great apes, bears, crocodiles or alligators, sloths and orcas as unacceptable; classing elephant shows and performances, plus direct contact or feeding of elephants without a barrier as unacceptable. |
| Improvement areas | <p>Flight Centre should:</p> <ul style="list-style-type: none"> • acknowledge the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences, and that animals are best seen in the wild • consider direct contact with cetaceans as unacceptable, or direct contact with wild animals of all species unacceptable • consider performances, fights and races as unacceptable for all wild animals, or for all animals - with no exceptions made for performances based on 'natural' behaviour • set and publicly disclose specific guideline/certification requirements for sanctuaries and wild watching experiences • consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals • provide clear messaging as to whether the whole policy and all commitments apply to the whole group, including of all brands and/or subsidiaries and to all products offered or promoted. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>Flight Centre should:</p> <ul style="list-style-type: none"> • provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines • provide public evidence of progress towards any policy implementation targets • publicly report on the breakdown of animal excursions offered. |

3. Changing industry supply

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>Flight Centre should:</p> <ul style="list-style-type: none"> confirm the animal welfare policy is incorporated into all supplier contracts provide further evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers, and a procedure in place to correct deviations from expected performance provide public evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training provide public evidence that Flight Centre has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Flight Centre provides some content which informs about the welfare and conservation concerns behind wildlife entertainment attractions, for example, cruel elephant training methods; reports some evidence of change in tourists' demands towards ethical wildlife experiences. The animal welfare policy can be found through a browser search. A generic contact is provided where customers could raise animal welfare concerns. |
| Improvement areas | <p>Flight Centre should:</p> <ul style="list-style-type: none"> provide content that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity; changes attitudes by exemplifying the tangible impact of ethical wildlife attractions, and how animals and visitors benefit from responsible wildlife tourist attractions. Content should be supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provide consumers with resources to identify ethical activities and attractions involving wild animals provide animal welfare content through the site map, any navigational menu, footer or home page, directly or via one click clearly signpost excursions that involve animals on the product page encourage customers to raise animal welfare concerns and provide a dedicated contact to do so. |

Selection Rationale

2019 Travel Weekly Powerlist #6; Top 3 US tour operator.³⁴

www.flightcentre.com.au is the primary website of Flight Centre Travel Group, one of the largest travel groups in the world with company-owned operations in 23 countries and a significant global portfolio of consumer brands and 2800 businesses. Although historically more of a traditional travel agent, they are going after online competitors by introducing a new OTA in the Australian market.³⁵

For this study, information was taken from The Flight Centre Travel Group website. Where questions require information relating to the customer booking platform <https://www.flightcentre.com.au/> was used.



4.7 GetYourGuide

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------------|---|---------|----|------------|-------------------------|--------------------------|--------------------------|
| Joint 9 th |  | Failing | 3% | 0% | 0% | 0% | 13% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>GetYourGuide should:</p> <ul style="list-style-type: none"> • create an animal welfare policy/commitment. The policy should acknowledge: the role of the travel industry in protecting wildlife; the Five Domains or Five Freedoms; that animals deserve a ‘good life’ with positive experiences, and that animals are best seen in the wild • consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants as unacceptable • consider performances, fights and races as unacceptable for all wild animals, or for all animals – with no exceptions made for performances based on ‘natural’ behaviour • set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don’t offer unacceptable activities, in addition to sanctuaries and wild watching experiences • remove any accredited venues from their offerings if they offer unacceptable activities • consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals • provide clear messaging as to whether the whole policy – once created – and all commitments apply to the whole group, including of all brands and/or subsidiaries and to all products offered or promoted. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>Once an animal welfare policy/commitment is created, GetYourGuide should:</p> <ul style="list-style-type: none"> • provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines • provide public evidence of progress towards any policy implementation targets • publicly report on the breakdown of animal excursions offered. |



3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | None |
| Improvement areas | <p>GetYourGuide should:</p> <ul style="list-style-type: none"> confirm the animal welfare policy – once created – is incorporated into all supplier contracts provide evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training provide public evidence that GetYourGuide has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> A generic contact form is provided where customers can raise animal welfare concerns. Curated customer reviews/feedback – both good and bad - are featured on product pages. |
| Improvement areas | <p>GetYourGuide should:</p> <ul style="list-style-type: none"> provide consumer content which informs about the welfare and conservation concerns behind wildlife entertainment attractions; reports some evidence of change in tourists' demands towards ethical wildlife experiences; that exemplifies good tourist behaviour and that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provide consumers with resources to identify ethical activities and attractions involving wild animals provide animal welfare content through the site map, any navigational menu, footer or home page, directly or via one click clearly signpost excursions that involve animals on the product page encourage customers to raise animal welfare concerns and provide a dedicated contact to do so allow customers to publish free text reviews of the products on the product pages. |

Selection Rationale

Global market share of online listings: #2 / 20%³⁶

GetYourGuide is the leading independent tours and activities marketplace,³⁷ and second in mobile bookings.³⁸ By May 2019 it had sold 25 million tickets for tours and activities, with 50,000 experiences on offer.³⁹

"GetYourGuide announced it would begin offering its own branded tours in August 2018, to complement the wide range of tours it offers from other suppliers."⁴⁰

Partnerships include EasyJet KLM, Interrail and Leonardo Hotels.⁴¹

4.8 Klook

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------------|----------------|---------|----|------------|-------------------------|--------------------------|--------------------------|
| Joint 9 th | KLOOK | Failing | 3% | 0% | 0% | 0% | 13% |

1. Commitment

| | |
|-------------------|--|
| Scored positives | None |
| Improvement areas | <p>Klook should:</p> <ul style="list-style-type: none"> • create an animal welfare policy/commitment. The policy should acknowledge the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences and that animals are best seen in the wild • consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants as unacceptable • consider performances, fights and races as unacceptable for all wild animals, or for all animals – with no exceptions made for performances based on 'natural' behaviour • set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences • remove any accredited venues from their offerings if they offer unacceptable activities • consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals • provide clear messaging as to whether the whole policy – once created – and all commitments apply to the whole group, including of all brands and/or subsidiaries and to all products offered or promoted. |

2. Targets and performance

| | |
|-------------------|--|
| Scored positives | None |
| Improvement areas | <p>Once an animal welfare policy/commitment is created, Klook should:</p> <ul style="list-style-type: none"> • provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines • provide public evidence of progress towards any policy implementation targets • publicly report on the breakdown of animal excursions offered. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | None |
| Improvement areas | <p>Klook should:</p> <ul style="list-style-type: none"> confirm the animal welfare policy - once created - is incorporated into all supplier contracts provide evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training provide public evidence that Klook has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> A generic contact form and online chat feature are provided, where customers can raise animal welfare concerns. Curated customer reviews/feedback - both good and bad - are featured on product pages. |
| Improvement areas | <p>Klook should:</p> <ul style="list-style-type: none"> provide consumer content which informs about the welfare and conservation concerns behind wildlife entertainment attractions; reports some evidence of change in tourists' demands towards ethical wildlife experiences; that exemplifies good tourist behaviour and that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, supported by links or references - eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provide consumers with resources to identify ethical activities and attractions involving wild animals provide animal welfare content through the site map, any navigational menu, footer or home page, directly or via one click clearly signpost excursions that involve animals on the product page encourage customers to raise animal welfare concerns and provide a dedicated contact to do so allow customers to publish free text reviews of the products on the product pages. |


Selection Rationale

Global market share of online listings: #5 / 4%.⁴²

The third top consumer-facing marketplace for tours, activities and attractions⁴³ with more than 100,000 activities in more than 270 cities. It accounts for half of Asian online sales in the activities sector. This arch-rival to GetYourGuide forecasts triple-digit growth in its US\$1 bn volume of transaction revenues of 2018.⁴⁴

"Other B2C tours and activities booking platforms such as Musement and Klook have attracted major investments and hope to capture their share of online T&A bookings."⁴⁵

4.9 Musement

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|---|----------------|-----------|------------|-------------------------|--------------------------|--------------------------|
| 9 th |  | Failing | 3% | 0% | 0% | 0% | 13% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>Musement should:</p> <ul style="list-style-type: none"> • create an animal welfare policy/commitment. The policy should acknowledge: the role of the travel industry in protecting wildlife; the Five Domains or Five Freedoms; that animals deserve a 'good life' with positive experiences, and that animals are best seen in the wild • consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants as unacceptable • consider performances, fights and races as unacceptable for all wild animals, or for all animals - with no exceptions made for performances based on 'natural' behaviour • set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences • remove any accredited venues from their offerings if they offer unacceptable activities • consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals • provide clear messaging as to whether the whole policy - once created - and all commitments apply to the whole group, including of all brands and/or subsidiaries and to all products offered or promoted. |

2. Targets and performance

| | |
|--------------------------|--|
| Scored positives | None |
| Improvement areas | <p>Musement should:</p> <ul style="list-style-type: none"> • provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines • provide public evidence of progress towards any policy implementation targets • publicly report on the breakdown of animal excursions offered. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | None |
| Improvement areas | <p>Musement should:</p> <ul style="list-style-type: none"> confirm the animal welfare policy – once created – is incorporated into all supplier contracts provide evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training provide public evidence that Musement has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> A generic contact form and online chat feature are provided, where customers could raise animal welfare concerns. Curated customer reviews/feedback – both good and bad – are featured on product pages. |
| Improvement areas | <p>Musement should:</p> <ul style="list-style-type: none"> provide consumer content which informs about the welfare and conservation concerns behind wildlife entertainment attractions; reports some evidence of change in tourists’ demands towards ethical wildlife experiences; that exemplifies good tourist behaviour and that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provide consumers with resources to identify ethical activities and attractions involving wild animals provide animal welfare content through the site map, any navigational menu, footer or home page, directly or via one click clearly signpost excursions that involve animals on the product page encourage customers to raise animal welfare concerns and provide a dedicated contact to do so allow customers to publish free text reviews of the products on the product pages. |

Selection Rationale

About one million travellers have booked through Musement which has 35,000 non-exclusive tours and activities products on its platform in 1,100 cities.⁴⁶


Musement was acquired by TUI in 2018. It has access to TUI’s 20 million customers and remains independent within TUI Destination Experiences which is available in 49 countries. This independence enables Musement to partner with other online travel agencies and distributors including Booking.com.

“Booking.com found out that scaling experiences on its own wouldn’t be a cakewalk, and it’s turning to Musement to kick off a preferred partnership strategy instead.”⁴⁷

Musement has also partnered Hostelworld’s ‘Hostel Noticeboard’ for activities and Reserve with Google, bookable from Google Search, Maps and the Assistant.

Despite the link between TUI and Musement, there is no public connection between TUI and Musement in terms of animal welfare content.

4.10 The Travel Corporation

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------------|---|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| Joint 2 nd |  | Good | 48% | 70% | 42% | 7% | 50% |

1. Commitment

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> The policy acknowledges the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences and that animals are best seen in the wild. Animal performances, fights, races are classed as unacceptable for all animals. The Travel Corporation refers to venues following responsible practices. The Travel Corporation consider any activity involving animals that were purchased, traded, bred or held captive for the purposes of tourism as unacceptable. The scope of the animal welfare policy applies to all brands of The Travel Corporation. |
| Improvement areas | <p>The Travel Corporation should:</p> <ul style="list-style-type: none"> publicly confirm direct contact as unacceptable for all wild animals, or at least big cats, elephants and cetaceans set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences remove any accredited venues from their offerings if they offer unacceptable activities. |

2. Targets and performance

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> The Travel Corporation states all wildlife experiences will conform to their Animal Welfare Policy by 2021. |
| Improvement areas | <p>The Travel Corporation should:</p> <ul style="list-style-type: none"> provide public evidence on whether any policy commitments regarding direct contact with animals and the requirement of specific certifications, guidelines or accreditations have been achieved, or that targets towards these two specific goals have been set with deadlines publicly report on the breakdown of animal excursions offered make it clearer, publicly, that progress towards meeting the policy criteria is being made. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> • The Travel Corporation outlines criteria that are prohibited/have to be met in order for suppliers to be contracted, though this is not incorporated into contracts. • The Travel Corporation evaluates suppliers to ensure compliance. • The Travel Corporation, through the TreadRight site, has spoken out in support of movements and organisations, outlining projects with goals clearly defined. |
| Improvement areas | <p>The Travel Corporation should:</p> <ul style="list-style-type: none"> • incorporate their animal welfare policy into binding supplier contracts • provide further public evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance • provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training • provide further public evidence that The Travel Corporation has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> • Consumers are provided with resources to identify ethical activities and attractions involving wild animals for wild animals in general and specific species. Content is supported by links or references - eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs. • Animal welfare content can be found through a browser search, and on The Travel Corporation and TreadRight websites, though not via the consumer booking platform (Trafalgar brand). • Customer reviews/feedback - both good and bad - are featured on product pages. • Customers are publicly encouraged to report animal welfare concerns to a dedicated email address. |
| Improvement areas | <p>The Travel Corporation should:</p> <ul style="list-style-type: none"> • provide consumer content which informs about the welfare and conservation concerns behind wildlife entertainment attractions; reports some evidence of change in tourists' demands towards ethical wildlife experiences; that exemplifies good tourist behaviour and that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, supported by links or references - eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs • provide consumers with resources to identify ethical activities and attractions involving wild animals • provide animal welfare content through the site map, any navigational menu, footer or home page, directly or via one click • clearly signpost excursions that involve animals on the product page • encourage customers to raise animal welfare concerns and provide a dedicated contact to do so • allow customers to publish free text reviews of the products on the product pages. |

Selection Rationale

"The world's largest tour operator"⁴⁸; Top 3 US tour operator 2020⁴⁹ with 1.9 million travellers annually.⁵⁰

The Travel Corporation owns 30 travel brands including tour operators, hotels, and transportation companies. It operates in 70 countries, has 40 offices around the world, 10,000 employees within 42 brands such Trafalgar brand reviewed, Contiki and The Red Carnation Hotel Collection.

Their Treadright Foundation has donated more than US\$2.5 million to sustainable tourism projects worldwide.

For this study, information was taken from The Travel Corporation and TreadRight websites. Where questions require information relating to the customer booking platform the brand Trafalgar was used.

4.11 Trip.com

| Position | Travel company | Overall | Commitment | Targets and performance | Changing industry supply | Changing consumer demand | |
|-----------------|-----------------|----------------|------------|-------------------------|--------------------------|--------------------------|-----|
| 8 th | Trip.com | Failing | 5% | 3% | 0% | 3% | 13% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> Animals are referenced briefly in a sustainability policy. |
| Improvement areas | <p>Trip.com should:</p> <ul style="list-style-type: none"> create an animal welfare policy/commitment which acknowledges the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences and that animals are best seen in the wild consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants as unacceptable consider performances, fights and races as unacceptable for all wild animals, or for all animals - with no exceptions made for performances based on 'natural' behaviour set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences remove any accredited venues from their offerings if they offer unacceptable activities consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals provide clear messaging as to whether the whole policy - once created - and all commitments apply to the whole group, including of all brands and/or subsidiaries and to all products offered or promoted. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | None |
| Improvement areas | <p>Once an animal welfare policy/commitment is created, Trip.com should:</p> <ul style="list-style-type: none"> provide public evidence on whether any policy requirements regarding direct contact, performances, fights and races, commercial breeding and accreditation/certification have been achieved, or whether any targets have been set with specific deadlines provide public evidence of progress towards any policy implementation targets publicly report on the breakdown of animal excursions offered. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> There is some evidence that Trip.com are speaking out in support of WWF and WTTC in relation to illegal wildlife trade. |
| Improvement areas | <p>Trip.com should:</p> <ul style="list-style-type: none"> confirm the animal welfare policy – once created – is incorporated into all supplier contracts provide evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training provide public evidence that Trip.com has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> A generic contact form and online chat feature are provided, where customers can raise animal welfare concerns. Customers can write and publish reviews – both good and bad – without curation. Customers are encouraged to raise animal welfare concerns and a dedicated email address is provided. |
| Improvement areas | <p>Trip.com should:</p> <ul style="list-style-type: none"> provide consumer content which informs about the welfare and conservation concerns behind wildlife entertainment attractions; reports some evidence of change in tourists’ demands towards ethical wildlife experiences; that exemplifies good tourist behaviour and that provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, supported by links or references e.g. to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provide consumers with resources to identify ethical activities and attractions involving wild animals provide animal welfare content through the site map, any navigational menu, footer or home page, directly or via one click clearly signpost excursions that involve animals on the product page. |


Selection Rationale

Trip.com (Group Limited, formerly Ctrip.com International), is the third largest online travel agency in the world.

It is the largest Chinese online travel agency with 400 million users worldwide, US\$4.54bn revenue in 2018⁵¹ and a 2020 brand valuation of US\$5,670m.⁵²

For tours and activities, they have partnered with Hostelworld’s ‘Hostel Noticeboard’. The group also owns Skyscanner, a metasearch engine and travel agency.⁵³ Skyscanner is used by 100 million people per month.

4.12 Tripadvisor

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|---|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| 2 nd |  | Good | 48% | 40% | 53% | 43% | 63% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> • Tripadvisor has an animal welfare policy, and direct interactions between certain species, including cetaceans, elephants and big cats is prohibited. • Animal performances, fights, races are classed as unacceptable for all wild animals, if those performances contain demeaning tricks or other unnatural behaviours. • Venues housing cetaceans must be WAZA accredited and have “publicly committed to implement” ceasing and preventing the breeding of cetaceans; ceasing the importation of captive cetaceans from other facilities for public display and ceasing the capture and importation of wild cetaceans for public display. • The scope of the animal welfare policy applies to Tripadvisor and its Viator brand. |
| Improvement areas | <p>Tripadvisor should:</p> <ul style="list-style-type: none"> • acknowledge the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a ‘good life’ with positive experiences and that that animals are best seen in the wild • consider direct contact with wild animals of all species as unacceptable • consider performances, fights and races as unacceptable for all wild animals, or for all animals - with no exceptions made for performances based on ‘natural’ behaviour • set and publicly disclose clear specific guideline/certification requirements for all zoos and aquaria, not just cetacean venues, that don’t offer unacceptable activities, in addition to sanctuaries and wild watching experiences • remove any accredited venues from their offerings if they offer unacceptable activities • consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals, and in sanctuaries • apply the policy to all brands and listings. |

2. Targets and performance

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> • The policy’s requirements on direct contact, performances, fights and races, commercial breeding and accreditation/certification have already been fully implemented within Tripadvisor. |
| Improvement areas | <p>Tripadvisor should:</p> <ul style="list-style-type: none"> • publicly report on the breakdown of animal excursions offered • make it clearer, publicly, that the policy is fully implemented within Tripadvisor. |

3. Changing industry supply

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> • Tripadvisor outlines criteria that are prohibited/have to be met in order for suppliers to be contracted. Binding T&Cs require supplier compliance; products in breach are removed/rejected from sale. • Tripadvisor evaluates suppliers against its animal welfare policy as an initial review; supplier self-assessment is needed for products added later. • Tripadvisor has spoken out in support of movements and organisations sharing information about improving animal welfare in tourism. |
| Improvement areas | <p>Triadvisor should:</p> <ul style="list-style-type: none"> • provide further public evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance • provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training • provide public evidence that Tripadvisor has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> • Tripadvisor informs consumers about the welfare and conservation concerns behind wildlife entertainment attractions in content such as 'Tourism and the Welfare of Elephants', and provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, such as "The Impact That Captivity Has on Orcas and Dolphins". The content is supported by links or references - eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs. • Animal welfare content can be found through a browser search and through a blog search. • The listings page states when products feature animals with a link to animal welfare content. • Customers can write and publish reviews - both good and bad - without curation. |
| Improvement areas | <p>Triadvisor should:</p> <ul style="list-style-type: none"> • provide content that changes attitudes by exemplifying the tangible impact of ethical wildlife attractions and how animals and visitors benefit from responsible wildlife tourist attractions, and Reports evidence of change in tourists' demands towards ethical wildlife experiences. Content should be supported by links or references as detailed above • provide customers with the knowledge needed to recognise ethical activities through content such as 'top tips', 'how to' articles, blogs and/or videos, or similar, covering wildlife attractions in general as well as specific animals such as elephants and turtles • provide animal welfare content through a navigational menu, footer, site map or home page, directly or via one click • clearly signpost excursions that involve animals on the product page, not just the listing, and link to animal welfare content from the T&Cs • publicly encourage customers to report animal welfare concerns and provide a dedicated contact to do so. Remove the need to log in to access the 'help centre'. |

Selection Rationale

Alexa 2020 travel rank: #2-3; SimilarWeb 2020 travel rank: #3.

"The world's largest travel platform", helping 463 million travellers each month⁵⁴ earned US\$1.62bn revenue in 2018.⁵⁵ It has evolved from a review platform to a travel comparison and booking site for lodging, travel experiences and restaurants.

It owns a number of brands including review, restaurant, home rental and activities sites. These include [FlipKey.com](#), [Thefork.com](#), [Holiday Watchdog](#), [Housetrip.com](#), [SeatGuru.com](#), and other key players in tours and activities.


In 2014, Tripadvisor complemented its review listings by acquiring Viator (see below) which it integrates as 'Tripadvisor Experiences'. This made Tripadvisor the market leading consumer marketplace for activities; it is roughly four times the size of Expedia by inventory.⁵⁶

Tripadvisor still lists the provider website on provider profile pages, but the more prominent Book Now function is designed to entice visitors to book through the Viator channel.⁵⁷

In April 2018, Tripadvisor also acquired Bokun - a technology company servicing the tours and activities segment. This is seen as Tripadvisor seeking "to solidify its leadership position among online tours and activities intermediaries"⁵⁸

For this study, information was taken from <https://www.Tripadvisor.com/> and refers to policies of the group Tripadvisor, Inc.

4.13 TUI.co.uk

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------|--|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| 3 rd |  (TUI.co.uk) | Fair | 45% | 47% | 53% | 73% | 7% |

1. Commitment

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> TUI.co.uk has sustainability strategy which refers to animal welfare and TUI outline their approach to animal welfare. TUI.co.uk follows ABTA's animal welfare guidelines, which include classing direct tourist contact or feeding of great apes, bears, crocodiles or alligators, sloths and orcas as unacceptable; classing elephant shows and performances, plus direct contact or feeding of elephants without a barrier as unacceptable. Venues housing cetaceans must be WAZA accredited and have "publicly committed to implement" ceasing and preventing the breeding of cetaceans; ceasing the importation of captive cetaceans from other facilities for public display and ceasing the capture and importation of wild cetaceans for public display. The scope of the animal welfare policy applies to all TUI Group brands, subsidiaries and products. |
| Improvement areas | <p>TUI.co.uk should:</p> <ul style="list-style-type: none"> acknowledge the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences and that that animals are best seen in the wild consider direct contact with wild animals of all species, or at least cetaceans, big cats and elephants unacceptable, not just the specific species in ABTA guidelines consider performances, fights and races with all wild animals, or with all animals as unacceptable, not just specific species in ABTA guidelines, with no exceptions made for performances based on 'natural' behaviour consider visiting facilities where animals are bred for commercial purposes as unacceptable for wild animals of all species, or at least cetaceans, big cats and elephants unacceptable, in addition to sanctuaries set and publicly disclose specific guideline/certification requirements for all zoos and aquaria that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences remove any accredited venues from their offerings if they offer unacceptable activities. |

2. Targets and performance

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> The policy's requirements on direct contact, performances, fights and races, commercial breeding and accreditation/certification have already been fully implemented within TUI.co.uk. |
| Improvement areas | <p>TUI.co.uk should:</p> <ul style="list-style-type: none"> publicly report on the breakdown of animal excursions offered make it clearer, publicly, that the policy is fully implemented. |

3. Changing industry supply

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> TUI.co.uk outlines criteria that are prohibited/have to be met in order for suppliers to be contracted. Binding contracts require supplier compliance. TUI.co.uk uses a third-party to audit some of its suppliers against its animal welfare policy and has a procedure in place to correct deviations from expected performance. Some generic training is a prerequisite to be a supplier. TUI.co.uk has spoken out in support of movements and organisations sharing information about improving animal welfare in tourism, including input into ABTA guideline creation, and working with World Animal Protection through the TUI Care Foundation. |
| Improvement areas | <p>TUI.co.uk should:</p> <ul style="list-style-type: none"> provide a public target for auditing all suppliers provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training. Confirm what elements of the training are a prerequisite, and whether the training covers animal welfare in general, or more specific activities tailored to certain venues or species provide further public evidence that TUI.co.uk has led or co-led joint initiatives within the industry and partnered with NGOs. Confirm the support provided through the TUI Care Foundation and where this support is monetary disclose the amount. |

4. Changing consumer demand

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Animal welfare content can be found through a browser search. A generic sustainability contact is provided where customers can raise animal welfare concerns. |
| Improvement areas | <p>TUI.co.uk should:</p> <ul style="list-style-type: none"> provide content that informs about the welfare and conservation concerns behind wildlife entertainment attractions; provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity; reports evidence of change in tourists' demands towards ethical wildlife experiences; changes attitudes by exemplifying the tangible impact of ethical wildlife attractions and how animals and visitors benefit from responsible wildlife tourist attractions. Content should be supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs provides customers with resources to identify ethical activities and attractions involving wild animals provide animal welfare content through a navigational menu, footer, site map or home page, directly or via one click on the customer booking platform signpost on the product page that the excursion involves animals, with a link to animal welfare content from the product page and the terms and conditions allow customers to publish free text reviews of the products on the product pages publicly encourage customers to report animal welfare concerns through a dedicated contact. |

Selection Rationale


TUI Group, the world's leading tourism group, had revenue of €18,928.1m in 2019 and a brand valuation of US\$2,947m in 2020.⁵⁹ Most information for this report was gathered from TUI UK & Ireland's www.tui.co.uk. TUI UK & Ireland's parent company is TUI Group. Researchers used <https://www.gotui.com/uk/> for customer booking information.

TUI Group incorporates a worldwide and integrated offering of tour operators. This involves: 1,600 travel agencies and leading online portals; five airlines; over more than 400 hotels; 18 cruise liners and many incoming agencies. in all major holiday destinations around the globe. It offers 27 million customers holiday experiences in 180 regions and describes itself as the "world's leading provider of Destination Experiences".⁶⁰

TUI Destination Experiences is one of TUI Group's three growth areas, employing 9,000 people in 49 countries. This area generates a turnover of €700m, from 14 million guests, including transfers and more than 6m tours and activities. In 2018 TUI acquired Italy-based Musement. TUI is the UK's largest ATOL holder (5,555,145).

TUI UK & Ireland's <http://www.tui.co.uk> was the selected business website from parent company TUI Group, from which most information was taken except for questions requiring information relating to the customer booking platform, in which case <https://www.gotui.com/uk/> was used.

4.14 Viator

| Position | Travel company | Overall | | Commitment | Targets and performance | Changing industry supply | Changing consumer demand |
|-----------------------|---|---------|-----|------------|-------------------------|--------------------------|--------------------------|
| Joint 2 nd |  | Good | 48% | 47% | 58% | 43% | 43% |

1. Commitment

| | |
|--------------------------|--|
| Scored positives | <ul style="list-style-type: none"> Viator has an animal welfare policy, and direct interactions between certain species, including cetaceans, elephants and big cats is prohibited. Animal performances, fights, races are classed as unacceptable for all wild animals, if those performances contain demeaning tricks or other unnatural behaviours. All tours involving animals are evaluated to ensure they adhere to ABTA guidelines, in addition to not offering the specific unacceptable activities stated in the criteria above. ABTA's animal welfare guidelines include classing direct tourist contact or feeding of great apes, bears, crocodiles or alligators, sloths and orcas as unacceptable; classing elephant shows and performances, plus direct contact or feeding of elephants without a barrier as unacceptable. Venues housing cetaceans must be WAZA accredited and have "publicly committed to implement" ceasing and preventing the breeding of cetaceans; ceasing the importation of captive cetaceans from other facilities for public display and ceasing the capture and importation of wild cetaceans for public display. The scope of the animal welfare policy applies to the full Viator brand. |
| Improvement areas | <p>Viator should:</p> <ul style="list-style-type: none"> acknowledge the role of the travel industry in protecting wildlife, the Five Domains or Five Freedoms, that animals deserve a 'good life' with positive experiences and that that animals are best seen in the wild consider direct contact with wild animals of all species as unacceptable consider performances, fights and races as unacceptable for all wild animals, or for all animals - with no exceptions made for performances based on 'natural' behaviour set and publicly disclose clear specific guideline/certification requirements for all zoos and aquaria, not just cetacean venues, that don't offer unacceptable activities, in addition to sanctuaries and wild watching experiences consider visiting all facilities where wild animals are bred for commercial purposes as unacceptable, for certain wild animals including elephants, cetaceans, and big cats, or for all wild animals, and in sanctuaries. |

2. Targets and performance

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> The policy's requirements on direct contact, performances, fights and races, commercial breeding and accreditation/certification have already been fully implemented within Viator. |
| Improvement areas | <p>Viator should:</p> <ul style="list-style-type: none"> publicly report on the breakdown of animal excursions offered make it clearer, publicly, that the policy is fully implemented within Viator. |

3. Changing industry supply

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> Viator outlines criteria that are prohibited/have to be met in order for suppliers to be contracted. Binding T&Cs require supplier compliance; products in breach are removed/rejected from sale. Viator evaluates suppliers against its animal welfare policy as an initial review; supplier self-assessment is needed for products added later. Viator has spoken out in support of movements and organisations sharing information about improving animal welfare in tourism. |
| Improvement areas | <p>Viator should:</p> <ul style="list-style-type: none"> provide further public evidence of auditing suppliers performance, including a percentage of suppliers audited, a target to audit all suppliers and a procedure in place to correct deviations from expected performance provide evidence of the company engaging suppliers/hosts in best practices, such as by raising awareness and providing training provide public evidence that Viator has led or co-led joint initiatives within the industry and partnered with NGOs. |

4. Changing consumer demand

| | |
|--------------------------|---|
| Scored positives | <ul style="list-style-type: none"> Viator directly links to Tripadvisor content which informs consumers about the welfare and conservation concerns behind wildlife entertainment attractions in content such as 'Tourism and the Welfare of Elephants', and provides knowledge regarding how the welfare needs of wild animals can never be fully met in captivity, such as "The Impact That Captivity Has on Orcas and Dolphins". The content is supported by links or references – eg to research reports, scientific studies, results of market research, expertise of animal welfare NGOs. Viator, through directly linking to Tripadvisor content, provides customers with the knowledge needed to recognise ethical activities through content such as 'top tips', 'how to' articles, blogs and/or videos or similar, covering wildlife attractions in general as well as specific animals such as elephants and turtles. Animal welfare content is found through a browser search and through a search in Viator's help section. Curated customer reviews/feedback – both good and bad – are featured on product pages. A generic contact is provided where customers could raise animal welfare concerns. |
| Improvement areas | <p>Viator should:</p> <ul style="list-style-type: none"> provide content that changes attitudes by exemplifying the tangible impact of ethical wildlife attractions and how animals and visitors benefit from responsible wildlife tourist attractions, and reports evidence of change in tourists' demands towards ethical wildlife experiences. Content should be supported by links or references as detailed above provide animal welfare content through a navigational menu, footer, site map or home page, directly or via one click signpost on the product page that the excursion involves animals, with a link to animal welfare content from the product page and the terms and conditions publicly encourage customers to report animal welfare concerns and provide a dedicated contact to do so. |

Selection Rationale

Global market share of online listings: #1 / 55% ⁶¹

Viator, as well as complementing owner Tripadvisor's review listings as 'Tripadvisor Experiences', is the largest direct-to-consumer marketplace for tours and activities with nearly 55 percent market share worldwide for its 70,000 online listings.⁶²

The market-leading market place was acquired in 2014 and integrated by Tripadvisor, as well as retaining its standalone site, offering direct access to more than 200,000 bookable tours and activities".⁶³

For this study, information was taken from <https://www.viator.com>. As this website links to the Tripadvisor education portal this was also taken into consideration, along with the Tripadvisor animal welfare policy where Viator is mentioned.

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