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Ecotourism Outlook 2018
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Ecotourism and Green Economy

What is Ecotourism?

Ecotourism is a subsector of the sustainable tourism industry that emphasizes social, environmental, and economic sustainability. When implemented properly, ecotourism exemplifies the benefits of responsible tourism development and management. In 2018, no new alterations were made to this highly cited definition which describes ecotourism as:

> *"Responsible travel to natural areas that conserves the environment, sustains the well-being of the local people and involves interpretation and education."*[1]

This definition clearly outlines the key components of ecotourism: conservation, communities and sustainable travel. Ecotourism represents a set of principles that have been successfully implemented in various communities and supported by extensive industry practice and academic research.

Twenty-eight years since TIES formed, it is important to re-visit three principles found in TIES literature – that ecotourism:
- is **NON-CONSUMPTIVE / NON-EXTRACTIVE**
- creates an ecological **CONSCIENCE**
- holds **ECO-CENTRIC** values and ethics in relation to nature

TIES considers non-consumptive and non-extractive use of resources for and by tourists and minimized impacts to the environment and people as major characteristics of **authentic ecotourism.**

What are the Principles of Ecotourism?

Since 1990, when TIES framework for ecotourism principles was established, we have learned more about the tourism industry through scientific and design related research and are also better informed about environmental degradation and impacts on local cultures and non-human species.

Ecotourism unites conservation, communities, and sustainable travel. As such, those who implement, participate in, and market ecotourism activities should adopt the following ecotourism principles:
- Minimize physical, social, behavioral, and psychological impacts.
- Build environmental and cultural awareness, and respect.
- Provide positive experiences for both visitors and hosts.
- Produce direct financial benefits for conservation.
- Generate financial benefits for both local people and private industry.

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[1] The Ecotourism Society. (2018). Retrieved from https://www.ecotourism.org/

- Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries' political, environmental, and social climates.
- Design, construct, and operate low-impact facilities.
- Recognize the rights and spiritual beliefs of the Indigenous Peoples in your community and work in partnership with them to create empowerment.

Ecotourism is not only achievable at a particular service level and specific locations (i.e., roughing it in tropical jungles). On the contrary, the principles serve as benchmarks to guide a range of tourism activities involving nature including but not limited to luxury, adventure, rural, culinary, and educational activities. Just as there are many different types of ecotourism businesses, ecotourism appeals to a wide range of travelers of all ages and interests who consider nature as a primary motivation for travel.

Interestingly, sustainable tourism is progressing into an industry-wide priority. Trends in recent years have included elements such as: carefully planned and researched trips, voluntary and conservation based trips, culturally based attractions, local and/or organic food while travelling, nature based sightseeing, increased traveler demand for animal welfare, and a variety of outdoor and adventure travel activities.**Error! Bookmark not defined.** As with previous reports, these concepts remain relevant when identifying trends, as nature-based tourism integrates many trends relative to adventure travel, outdoor recreation, business, and of course the mainstream tourism industry.

Sustainable Tourism Sells
Growth in the Travel and Tourism Industry continues to outpace that of the global economy annually, leading by a 4.6% margin in 2018.[2] Travel and tourism are human-resource intensive which creates new jobs and accounts for 10.4% of global GDP. Travel and Tourism supports 1 out 10 jobs globally and are responsible for 1 in every 5 jobs created in the last decade.

Research from The Center for Responsible Travel (CREST) shows that travelers expect businesses to become sustainable in some way and prefer to use the services of companies that follow green or eco-friendly practices.[3] Travelers exhibit increasing concern regarding environmental and cultural impacts, and are more likely to choose low-impact, sustainable travel options. Tourism managers are faced with the expectation to accommodate this shift by making sustainable purchasing decisions, pursuing sustainability certifications, and providing opportunities for travelers to give back to local communities. This is reflected in a rise in the number of consumers, from 65% in 2017 to 68% in 2018 actively seeking out eco-friendly accommodations.[4] Accordingly, the practice of allocating specific budgets for Hotel Green Teams continues to expand, and visitors can expect to see more Green Teams in place at both full service and limited service hotels. [5]

Businesses in the lodging sector lead the curve in implantation of energy management systems that result in high impact cost savings through conservation. According to the Green Lodging Trends Report 2017, hoteliers are meeting consumer demand for energy efficiency through the implementation of energy saving systems such as of LED lighting, high efficiency boilers and chillers, on-site renewable energy systems, green roofs, and Electric Vehicle charging stations.[6]

[2] World Travel and Tourism Council. (2018). *Travel and tourism: Economic Impact 2018 world*. Retrieved from *https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/world2018.pdf*

[3] Center for Responsible Travel. (2018). The Case for Responsible Travel: Trends & Statistics 2018. Retrieved from:
https://www.responsibletravel.org/docs/The_Case_for_Responsible_Travel_2018_FINAL_FOR_WEB.pdf

[4] Ibid.

[5] Green Lodging News and Greenview. (2017). *Green Lodging Trends Report, 2017*. Retrieved from http://www.greenlodgingnews.com/wp-content/uploads/2017/09/Green-Lodging-Trends-Report-2017_Final.pdf

[6] Ibid.

Trend Increases: Development of Sustainable Tourism Destinations

Sustainable Food Sourcing
Local and sustainably sourced foods contribute to community economic resilience, reduce environmental impacts, and may cultivate an authentic sense of place and culture for visitors. In response to increasing guest demand for local foods, the number of hotels with a local food sourcing policy is on the rise.[7] TIES and many ecotourism entities support this growing trend, and reports on their emphasis on offering local organic meals at their annual Ecotourism and Sustainable Tourism Conference in order to "conserve energy used in transportation and promote local products that are grown using environmentally friendly practices."[8]

Demand for Authentic Travel Experiences
Demand for authentic, experiential, and transformative travel experiences is on the rise.[9] Travelers are now more likely to seek out experiences that include cultural immersion and experiential education and have the potential to be eye opening or life changing. This trend is also recognized by the Adventure Travel and Trade Association's latest report, which concluded that adventure travelers desire to explore the backstage of tourism areas, seeking out destinations that will allow them to feel like temporary locals through genuine amicable interactions between locals and visitors.[10,11]

Health Motivated Travel
Visitor demand for health and wellness travel experiences that enrich both mind and body continue to grow. However, travelers are less likely to base their primary motivations for travel in health and wellness, but rather expect a wide availability of physically active and mentally restorative secondary activities during travel.[12] Additionally, companies are responding to demands for wellness elements within travel through innovative programs designed to limit traveler stress and maximize health and wellness outcomes during travel.[13]

Co-living and Sharing Economy Experiences
Global economic developments have supported the growth of a freelance and entrepreneurial traveler with a preference for co-living and sharing economy-based tourism experiences such as Airbnb. However, a recent report from Allianz Global Assistance reported the first decline in traveler intention to seek out sharing economy services during summer 2018. Allianz reports that Millennials continue to drive demand for sharing economy experiences during travel, yet cite concerns regarding ease of booking process, reliability, and corporate culture as factors impacting decision making.[14]

Last Chance Tourism
Recognizing changes in the natural world caused in part or entirely due to human actions – such as climate change,[15] pollution, and habitat loss – tourists are pursuing what is referred to "last chance" tourism. Last chance tourism is travel motivated by the desire to see threatened or diminishing natural attractions, including glaciers, coral reefs, endangered species, etc.[16] Locations featuring these attractions may continue to experience heightened

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[7] Ibid.

[8] Ecotourism and Sustainable Tourism Conference 2017.

[9] Ibid.

[10] Ibid.

[11] Adventure Travel and Trade Association. (2018). 20 Adventure Travel Trends to Watch in 2018. Retrieved from https://cdn1.adventuretravel.biz/research/2018-Travel-Trends.pdf

[12] Skift (2017). Wellness Tourism Means Secondary Activities for Most Global Travelers. Retrieved from https://skift.com/2017/02/13/wellness-tourism-means-secondary-activities-for-most-global-travelers/

[13] Adventure Travel and Trade Association. (2018). 20 Adventure Travel Trends to Watch in 2018. Retrieved from https://cdn1.adventuretravel.biz/research/2018-Travel-Trends.pdf

[14] Travel Market Report. (2018). Shared Economy Services May Be Losing Their Popularity. *Retrieved from https://www.travelmarketreport.com/articles/Shared-Economy-Services-May-Be-Losing-Their-Popularity*

[15] United Nations Climate Change. (2018). *UN Climate Statement*. Retrieved from https://unfccc.int/news/unfccc-secretariat-welcomes-ipcc-s-global-warming-of-15degc-report

[16] Smarter Travel. (2018). 9 New Travel Trends to Watch in 2018. Retrieved from https://www.smartertravel.com/travel-trends-2018/

visitation,[17] simultaneously creating opportunities for increased awareness and resource protection as well as increased risk of overtourism.

Overtourism

The Global Sustainable Tourism Council (GSTC) acknowledges *overtourism* as a major threat to the industry[18]. Overtourism describes the tipping point where the costs of tourism outweigh the benefits for local communities due to overcrowding or poor management[19]. If not managed properly, *overtourism* is a threat to sustainable tourism development. The growing concern for *overtourism* offer opportunities for tourism professionals to implement sustainability best practices and improve site-specific sustainable destination-level management plans. CREST cites overtourism as a complex trend in the travel industry and calls upon destination managers to engage with all sectors and stakeholders involved in tourism towards long-term, fact-based planning to mitigate overtourism.[20]

Social Justice and Sustainable Tourism

Global threats to political stability, civil liberties, and human rights challenge safety and security integral to the travel and tourism industry.[21] Travelers are also increasingly aware of human rights and working conditions, demanding forms of responsible tourism that protect people and give back to communities.[22] Sustainable Tourism planners are faced with a unique set of challenges and opportunities in navigating strategies to address to both the needs of travelers and hosts with regard to human rights and social justice. Inclusive tourism is a growing sector within the industry that emphasizes the idea that tourism is for all and that operators should actively strive to improve accessibility for all persons.[23]

Destination Planning

While certification, guidelines, and best practices remain important to guide ecotourism lodging and operators, there is an increase in considering the destination as a whole. This trend is developing and endorsed by the Global Sustainable Tourism Council (see gstcouncil.org) in implementing sustainable tourism, inclusive of all forms of tourism. According to the GSTC (2018) "public sector tourism policy-makers and destination managers throughout the world turn to the GSTC Destination Criteria for guidance in developing policy, raising awareness and conducting training, and for use as a framework for national or localized sustainability standards. GSTC urges policy-makers and destination managers to pledge to adhere to the GSTC Destination Criteria. [24]" Certification bodies are now certifying destinations (see https://www.gstcouncil.org/certification/become-certified-destination/). Destinations are inclusive of all types of boundaries, such as parks, islands, towns, and cities. With the advent of destination criteria more entities are taking a holistic view of sustainability and turning to the socio-ecological system as a means for effecting positive change in tourism.

Ecotourism and the Sustainable Development Goals

The International Year of Sustainable Tourism was an opportunity to educate people all over the world, from businesses to consumers to multi-national organizations to celebrate, explore, and connect to benefits associated with sustainable tourism and especially ecotourism. Building on the Millennium Development Goals, the 17 Sustainable Development Goals (SDGs) with 169 associated targets. The purpose of the SDGs is to end poverty and hunger, improve health and education, make cities more sustainable, combat climate change, protect the world and oceans from environmental degradation and foster prosperous, peaceful, just and inclusive societies. [25] Tourism, specifically mentioned in three SDGs (#8, #12, #14), has significant potential to

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[17] Wildsea Europe. (2018). *Ecotourism Trends for 2018.* Retrieved from https://www.wildsea.eu/blog-en/ecotourism-trends-for-2018.html

[18] Global Sustainable Tourism Council. (2017). 15 Ways You Can Help Curb Overtourism. Retrieved from https://www.gstcouncil.org/15-ways-can-help-curb-overtourism/

[19] Ibid.

[20] Center for Responsible Travel. (2018).

[21] Adventure Travel and Trade Association. (2018).

[22] Center for Responsible Travel. (2018).

[23] Global Sustainable Tourism Council (GSTC). (2017). 5 key sustainable tourism trends to watch: Sustainability for businesses, destinations and consumers [webinar]. Retrieved from https://www.youtube.com/watch?v=Ezco5igdiRY

[24] Global Sustainable Tourism Council (GSTC) (2018). GSTC for Destinations. Retrieved October 10, 2018 from: https://www.gstcouncil.org/for-destinations/

[25] United Nations World Tourism Organization (2018) Tourism and the SDGs. Retrieved October 12, 2018 from: http://icr.unwto.org/content/tourism-and-sdgs

contribute, directly or indirectly, to all SDGs, in more ways than most industries[26]. To assist in engaging citizenry and all tourism stakeholders around the world in the SDGS, UNWTO developed the 'Tourism for SDGs platform (www.tourism4sdgs.org). The platform's three main features, Learn, Share and Act, are also calls for action, conversation and collaboration towards a sustainable tourism sector. [27]

Ecotourism Participation Trends in the United States

Outdoor Recreation and Low-Impact Nature Travel Trends in the U.S.
Due to a deficit of comprehensive ecotourism participation statistics, outdoor recreation statistics are often used as a proxy to evaluate ecotourism participation and development patterns. Outdoor recreation activities often align closely with the types activities "ecotourists" tend to engage in while experiencing the outdoors.   Sources of information used to gauge recent trends in outdoor recreation in 2017 were produced by the Outdoor Industry Association and the Outdoor Foundation.

This year, the Outdoor Industry Association released a congressional-level report which indicated that the outdoor recreation industry contributed significantly to the U.S. economy, generating $887 billion in annual consumer spending and supporting 7.6 million jobs.[28] Consistent with previous reports, such as the 2017 Outdoor Recreation Participation Topline report,[29] the Outdoor Foundation's 2018 Outdoor Participation Report stated that 146.1 million U.S. Americans (49.0% of all Americans) participated in at least one outdoor activity in 2017. [30] This represents a slight net increase (~1.7 million participants) from the previous year. However, the number of total outings decreased from 11.0 billion outings in 2016 to 10.9 billion outings in 2017, following a slight downward trend observed since 2013.

As in previous years, running, jogging, and trail running remain the most popular outdoor activity by participation rate and frequency of participation.[31] Biking (including road, mountain, and BMX biking) was the third most popular activity by participation rate, boasting 47.5 million U.S. American participants in 2017, followed by hiking (44.9 million participants) and then camping (including car, backyard, backpacking, and RV camping; 41.8 million participants).

National Park Visitation
The National Parks Service (NPS) manages 417 national park sites in the United States.[32] Many national park sites offer visitors the opportunity to participate in authentic ecotourism activities. Collectively, NPS units received 330.8 million recreation visits in 2017,[33] which is approximately 90,000 visits less than NPS's centennial and record-breaking year in 2016.[34] Despite the decrease, this figure marks a significant increase over visitation in 2015, during which only 307.2 million visits were recorded (see table below).

Some NPS units, such as National Battlefields or National Historic Sites, may draw visitors who are not interested or do not participate in nature-based adventures. Therefore, aggregate data from all NPS units may not be the best proxy for ecotourism participation. However, visitor statistics from NPS units primarily associated with nature-based activities do demonstrate increases overall. Table 2 displays a comparison between the visitation for different NPS units in 2016 and 2015. Generally, average visitation trend is upward.

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[26] Ibid.

[27] Ibid.

[28] Outdoor Industry Association. (2018). *The Outdoor Recreation Economy.* Retrieved from https://outdoorindustry.org/wp-content/uploads/2017/04/OIA_RecEconomy_FINAL_Single.pdf
[29] Outdoor Foundation. (2017*). Outdoor Recreation Participation Topline Report, 2017*. Outdoor Industry Foundation, Boulder, CO. Retrieved from https://outdoorindustry.org/wp-content/uploads/2017/04/2017-Topline-Report_FINAL.pdf
[30] Outdoor Foundation. (2018*). Outdoor Participation Report, 2018*. Retrieved from https://outdoorindustry.org/resource/2018-outdoor-participation-report/
[31] Outdoor Foundation. (2018*). Outdoor Participation Report, 2018*. Retrieved from https://outdoorindustry.org/resource/2018-outdoor-participation-report/
[32] National Park Service (NPS). (2018). *Frequently Asked Questions.* Retrieved from https://www.nps.gov/aboutus/faqs.htm
[33] NPS. (2018). *National Park Service Annual Reports*. Retrieved from https://irma.nps.gov/Stats/Reports/National
[34] NPS. (2018). *Annual Visitation Highlights*. Retrieved from https://www.nps.gov/subjects/socialscience/annual-visitation-highlights.htm

Table 1: Summary of Visitor and Recreational Trends in National Parks[35]

Year	Recreation Visits	Tent Camper Overnights	RV Camper Overnights	Backcountry Camper Overnights
2003	266,099,641	3,302,637	2,400,232	1,816,088
2004	276,908,337	3,128,014	2,321,669	1,725,309
2005	273,488,751	2,974,269	2,168,287	1,668,558
2006	272,623,980	2,882,297	2,109,404	1,659,484
2007	275,581,547	3,003,270	2,107,541	1,704,059
2008	274,852,949	2,959,761	2,012,532	1,797,912
2009	285,579,941	3,184,255	2,150,170	1,860,162
2010	281,303,769	3,277,151	2,256,692	1,763,541
2011	278,939,216	3,229,241	2,155,330	1,715,611
2012	282,765,682	3,203,413	2,121,646	1,816,904
2013	273,630,895	2,768,708	1,791,921	1,573,734
2014	292,800,082	3,246,320	2,053,965	1,888,095
2015	307,247,252	3,680,809	2,260,198	2,020,068
2016	330,971,689	3,858,162	2,543,221	2,154,698
2017	330,882,751	3,734,119	2,460,834	2,074,773

Table 2. Visitation by Park Units: A comparison between 2017, 2016, and 2015[36]

Administered by Type	Recreation Visits 2017	Recreation Visits 2016	Recreation Visits 2015
National Lakeshore	4,821,208	4,343,000	4,131,668
National Monument	26,333,165	25,728,513	24,888,632
National Park	85,451,798	82,895,409	75,290,221
National Parkway	31,415,912	32,802,051	29,557,215
National Preserve	3,446,867	3,541,952	3,348,168
National Recreation Area	52,107,818	50,331,201	46,230,396
National Reserve	130,276	107,865	105,289
National River	5,003,218	5,166,429	4,690,768
National Seashore	18,472,367	19,797,234	18,706,214
National Wild & Scenic River	1,473,844	1,460,635	1,330,776
Park (Other)	9,334,814	8,942,596	8,496,867

A Global Summary and Outlook

Overall, the trend of consumers of travel demanding more individual and authentic travel experiences, which ecotourism can provide, continues. There is continued growth in adventure and experiential travel, blending physical adventure with wildlife and nature providing the features people seek. Travel consumers are increasingly expecting sustainability options to be available throughout all aspects of the tourism experience. Moving forward, travel and tourism experts agree, "Consumers will seek new and more authentic experiences…"and more interaction with local communities. [37] Consumer attention to authenticity and community-based tourism renders industry professionals responsible for the imperative to counter threats to human rights, social and environmental justice,

[35] NPS. (2018). *National Park Service Annual Reports*. Retrieved from https://irma.nps.gov/Stats/Reports/National
[36] Ibid.
[37] IKP International (2015). ITB World Travel Trends Report, p. 18. Retrieved October 14, 2015 from http://www.itb-berlin.de/media/itbk/itbk_dl_en/WTTR_Report_A4_4_Web.pdf.

and the mitigation of overtourism issues. Businesses in tourism, especially ecotourism will look at how they are addressing the SDGs as a potential framework to address the societal and environmental challenges of our day.