TRENDS AND ISSUES FOR ECOTOURISM & SUSTAINABLE TOURISM

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"RESPONSIBLE TRAVEL TO NATURAL AREAS THAT CONSERVES THE ENVIRONMENT AND IMPROVES THE WELL-BEING OF LOCAL PEOPLE." (TIES, 1990)
The International Ecotourism Society

Founded in 1990, Network NGO

Dedicated to promoting ecotourism

Members from around the world (over 90 countries): tour operators, lodge owners, affiliated businesses, universities, NGOs, associations, professionals, travelers.

Mission: Engage, Educate, Inspire
EXAMPLES OF GLOBAL & LOCAL EVENTS

- **Global Network:** ESTC Conference, Ecotourism Associations, Travel Green Guide, Eco Travel 360°

- **Educational Programs:** ESTC Conferences, Workshops, UCC

- **Mainstreaming Sustainability:** ecoDestinations, support the GSTC
UNITING STUDENTS & PROFESSIONALS FOR GREAT OPPORTUNITIES!

THE INTERNATIONAL ECOTOURISM SOCIETY

UNIVERSITY CONSORTIUM CERTIFICATE IN SUSTAINABLE TOURISM
• YOUR TRAVEL CHOICE—SHOULD BE UPDATED!
VOLUNTOURISM GUIDELINES POSTED...
TRENDS
Green travel is here to stay:

- 24% reported green is highest it has ever been in 10 years; 51% reported that interest remains constant (Travel Guard Update, April 2013).

- 38% TAs noted archeological/caves; 22% wildlife and birds; 18% visiting national parks; 16% culture and communities.

- TAs report popular destinations: 49% Costa Rica, 12% South Africa, 8% Galapagos Islands, 7% Peru, 6% Belize (all others 5%).

- TAs report high percentage interested in giving back! 45%, volunteer activities commonly take place 25% are interesting activities for a day or two (Travel Guard Update, April 2013).
TRENDS—CONSUMER STATISTICS

93% of Conde Nast Traveler readers surveyed in 2011, travel companies should be responsible for protecting the environment

58% said their hotel choice is influenced by the support the hotel gives to the local community

Trip Advisor-survey 2012, 71% said they plan to make more eco-friendly choices in the next 12 months, compared to 65% that did so in the past 12 months

2012 Nielsen Wire Survey
-66% of consumers around the world say they prefer to buy products and services from companies that have implemented programs to give back to society.

-Forty-six percent are willing to pay extra for CSRs
Consumer Behavior Trends

Social Media

• Travelers are employing technology as part of the “experience”
• Possibilities for citizen science
• Used for pre-trip planning, communicating, and post trip.
Experiencing & Learning
Consumers are demanding more individual and authentic travel experiences (ITB 2012)

Nature-based, Culture, Adventure
10 million US travelers in total.

Human powered activities as a trend input—increased in 2012, 141.9 million—highest participation level in 6 years
Break down Barriers to Travel

In Europe alone, 80 million people with disabilities, with traveling companions, 133 million people.

-Good to invest in tomorrow’s customer, 10% of travelers have some form of disability or long-term health problem.

(ITB 2012)
TRENDS

Break down Barriers to Travel

-Given the aging market, demand will grow in years to come.

-Create sufficient facilities throughout the value chain

(ITB 2012)
TRENDS...

It’s a jungle out there...

32% Agents stated that clients are concerned about suffering injury in remote locations; flight delays or cancellations; inclement weather; contracting a tropical disease; unexpected trip cancellations.

94% of Agents responded that clients typically purchase travel insurance.

(Travel Guard Update, April 2013).
Eco-conscious consumers travel more frequently than the average consumer. During 2009, nearly 76% took at least two vacations away from home and 22% took five to eight vacations during that time. CMIGreen Traveler Study 2010.

**Volunteer vacations** growing. 2009 Conde Nast Readers poll, 47% of those who responded said they are interested in volunteer vacations and 98% of those who had volunteered said they were satisfied with their experience.

**TIES Volunteer Guidelines:**

In April 2012, the Adventure Travel Trade Association (ATTA) undertook a survey of over 140 members, who are tour operators working in the adventure travel sector. According to ATTA’s report, 55% of those surveyed “currently run volunteer trips”; of the remaining 45%, over 41% of them are “considering [volunteer trips] for the future”. Reasons cited for this included “growing awareness and demand for ‘giving back’” as well as consumer trends towards local and sustainable initiatives.

Source: www.adventuretravelnews.com/results-are-in-atta-survey-on-voluntourism
TRENDS

TRAVELER STATISTICS

• More than 25% - direct benefits to travel was to destination communities and economics.

• Nearly 50% said that travel inspired awareness of environmental diversity, promotes a culture that values the environment, and the importance of protecting endangered locations, species, cultures

• Increased number of respondents who acted on their environmental concerns while they traveled (37%, up 5% from last survey)
  • Nearly 30% did not know how!

Photo-Greg Corio
ISSUES & CHALLENGES FACING SUSTAINABLE TOURISM & ECOTOURISM
CHALLENGES OF ECO-RURAL TOURISM DEVELOPMENT
CHALLENGES...

Geographical

Policy

Human Resources

Investment
BENEFITS OF ECOTOURISM ON BIODIVERSITY...

- Source of financing
- Provides local people with economic alternatives
- Justification for conservation
- Creates constituency building
LIMITATIONS OF TOURISM INDUSTRY ACTION

• Lack of interest amongst stakeholders such as investors, shareholders, and suppliers.

• Factors beyond the control of the private sector enterprise, such as government policy.

• The need to respond to actions of competitors.

• The need to promote and verify the GSTC destination and other sector involvement.
LACK OF CONSISTENT DATA TO VERIFY CLAIMS AND ACTION

• While ecotourism and sustainable tourism are recognized as an important, growing tourism segment, primary research to quantify the size and scope of the market in the USA or internationally is lacking...

• Work with UNWTO to collect consistent visitor data, at least from primary markets;

• Infuse TIES with grants to collect and distribute data;
MARKET DATA NEEDS

- Size of market
- Analysis of behavior patterns including online behavior and social networking sites
- Activities
- Purchasing patterns
- Socio-demographics
- Other?
DESTINATION DATA NEEDS

- Number of operators within a region
- Tracking economic, environmental, social indicators
- Consistent reporting of indicators to track over time
WHAT IS ADVENTURE TRAVEL?
ADVENTURE AND VOLUNTEER MARKET STATISTICS-2013

- $263 Billion in global spending

- 42% of travelers from regions reported an adventure activity as the main activity of their last trip

- Average yearly growth of 65%

- Europe, N America, S American make up nearly 70 percent of the world’s international tourism departure...

- Increases due to two ideas: 1) consumer demand for natural and cultural discovery through physical activity; 2) Operators and destinations adapted...

SOURCE: Adventure Tourism Market Report, Study by George Washington University, Adventure Travel Trade Association, Xola Consulting; 2013
**ADVENTURE TRAVELER SEGMENTATION BY ACTIVITY**

**Hard Adventure:**
- Mountaineering
- Caving
- Roped Climbing

**Soft Adventure:**
- Cultural Activities
- Birdwatching
- Canoeing
- Cycling
- Horseback riding
- Safaris

**Mainstream Travelers:**
- Cities
- Sun, Sand & Each Other
ADVENTURE TRAVELER SEGMENTATION EVOLVES TO VALUES

Eco-Traveler
• Seeks connection with authenticity of people and nature

Adventure Traveler
• Seeks connection with nature via thrilling activities

Eco-Adventurer
• Seeks authentic, thrilling and/or awakening activities
World Travel Market
2013
Travel with Meaning

TRENDS PRESENTATION

Sources:

- The Case for Responsible Travel: Trends & Statistics 2012, by the Center for Responsible Travel
- National Parks
- ATTA Market Studies 2009/2013
- The Center for Hospitality Research
- ITB World Travel Trends Report
- UNEP’s Green Economy Report
- Outdoor Industry Foundations 2012 Report
- APEC 2013
- Recent books including: Sustainable Tourism and the MDGS: Effecting positive change; Ecotourism & Sustainable Tourism in Indonesia; Opportunities and Challenges of Ecotourism in ASEAN Countries; Ecotourism Destinations in Archipelago Countries
The end...
WHAT IS THE GSTC?

• GSTC is the international body for promoting the increased knowledge, understanding and adoption of sustainable tourism practices

• Represent UN agencies, leading travel companies, hotels, country tourism boards and tour operators

• Promotes adoption of universal sustainable tourism principles

• Develops tools and training to engage in sustainable tourism practices

• Increases the demand for sustainable tourism products and services
IT HAS THE POWER TO CREATE CHANGE ON A GLOBAL SCALE.

- Preserve destinations for generations to come
- Revitalize local economies and communities
- Alleviate poverty
- Safeguard our cultural heritage
- Help reach the UN Summit’s Millennium Development Goals
- Create jobs within and beyond destinations
- Keep tourism dollars within destinations
GSTC CRITERIA: GLOBAL INPUT. GLOBAL STANDARD.

Establishment of GSTC Criteria:

- Outreach to 80,000 constituencies
- 2,000 experts
- 18-month process
- 5 rounds
- 4,500 existing criteria analyzed
- 91% approval for any criterion
- ISEAL compliant
WHAT ARE THE CRITERIA?

- A universal language defining a minimum standard for sustainability
- Global principles that can be adapted to address local conditions and specific industry sectors
- A guideline for establishing programs
- Supporting the certifiers.
37 CRITERIA, 4 PILLARS.

Sustainability Management  
Social & Economic  
Cultural  
Environmental
OVERVIEW OF GSTC DESTINATION CRITERIA

• Universal set of criteria and indicators that will help destinations advance work around the key pillars of sustainability and track changes occurring in destinations over time

• Collective of 45 criteria with 122 corresponding indicators organized around four key pillars of sustainability:
  – Sustainable destination management issues
  – Social and economic issues
  – Community and cultural heritage issues
  – Environmental Issues

One global standard. Tuned to the needs of each place.
GSTC’S EARLY ADOPTERS PROGRAM - OBJECTIVES

1. Conduct a destination good practices evaluation that will provide snapshot of the destination’s readiness for destination criteria

2. Validate the range, applicability, and clarity of the criteria and indicators following ISEAL procedures

3. Provide recommendations to assist the destination transition to sustainable tourism
A. Jackson Hole – Wyoming, USA  
B. Mt. Huangshan – China 
C. St. Kitts and Nevis - Caribbean 
D. Fjords – Norway 
E. Lanzarote – Spain 
F. Okavango Delta - Botswana 
G. Cuzco Sacred Valley, Peru 
H. Lake District, Chile 
I. Fjords – Norway 
J. South Sardina, Italy 
K. Naboisho Conservancy, Kenya 
L. St. Croix, Virgin Islands 
M. Sierra Gorda, Mexico 
N. Riviera Maya, Mexico
POSITIONED FOR SUSTAINABILITY

• Sustainability is a journey; lessons learned from elsewhere may help focus sustainability efforts

• Consumers expect it and long-term growth in value depends on it
Principles of Ecotourism

Non-destructive use

Protection and restoration of biodiversity

Promotion of environmentally sustainable development

Education and interpretation, awareness

Direct economic benefit for local people, alleviation of poverty

Health, well-being of stakeholders
Thank you!