




TRENDS AND ISSUES FOR ECOTOURISM & SUSTAINABLE TOURISM

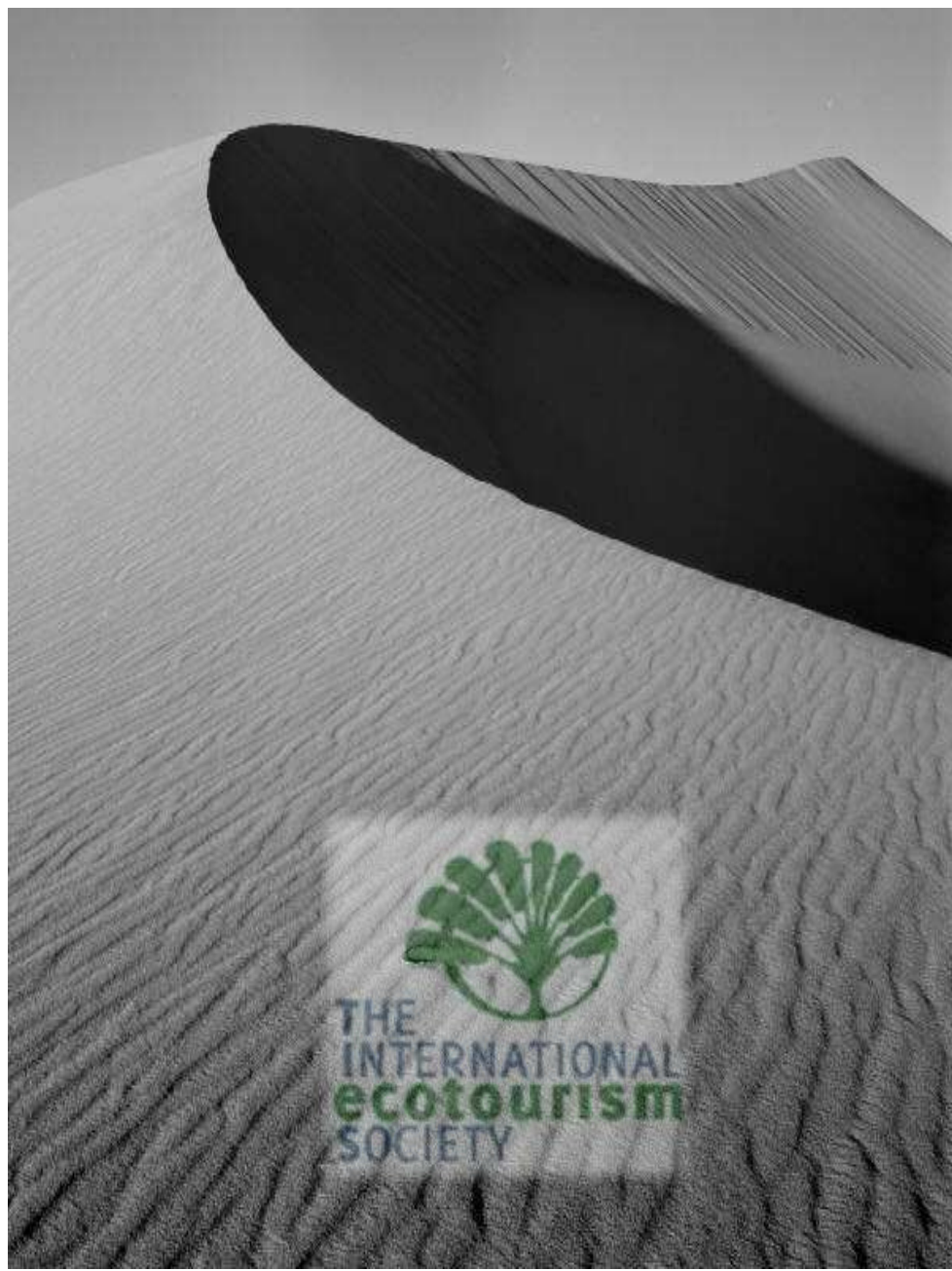
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Extraordinary travel meets
endless possibilities

Uniting Conservation, Communities, and Sustainable Travel

***"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!**



Your Travel Choice

Change the way you travel and help change the world



- YOUR TRAVEL CHOICE—SHOULD BE UPDATED!
VOLUNTOURISM GUIDELINES POSTED...



TRENDS

Consumer Behavior 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



Photo-Greg Corio

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.



Photo-Greg Corio

TRENDS



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

TRENDS

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)



Photo-Greg Corio

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).



TRENDS

TRAVELER STATISTICS

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



Photo-Greg Corio

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

Human
Resources

Policy

Investment

BENEFITS OF ECOTOURISM ON BIODIVERSITY...



Source of financing



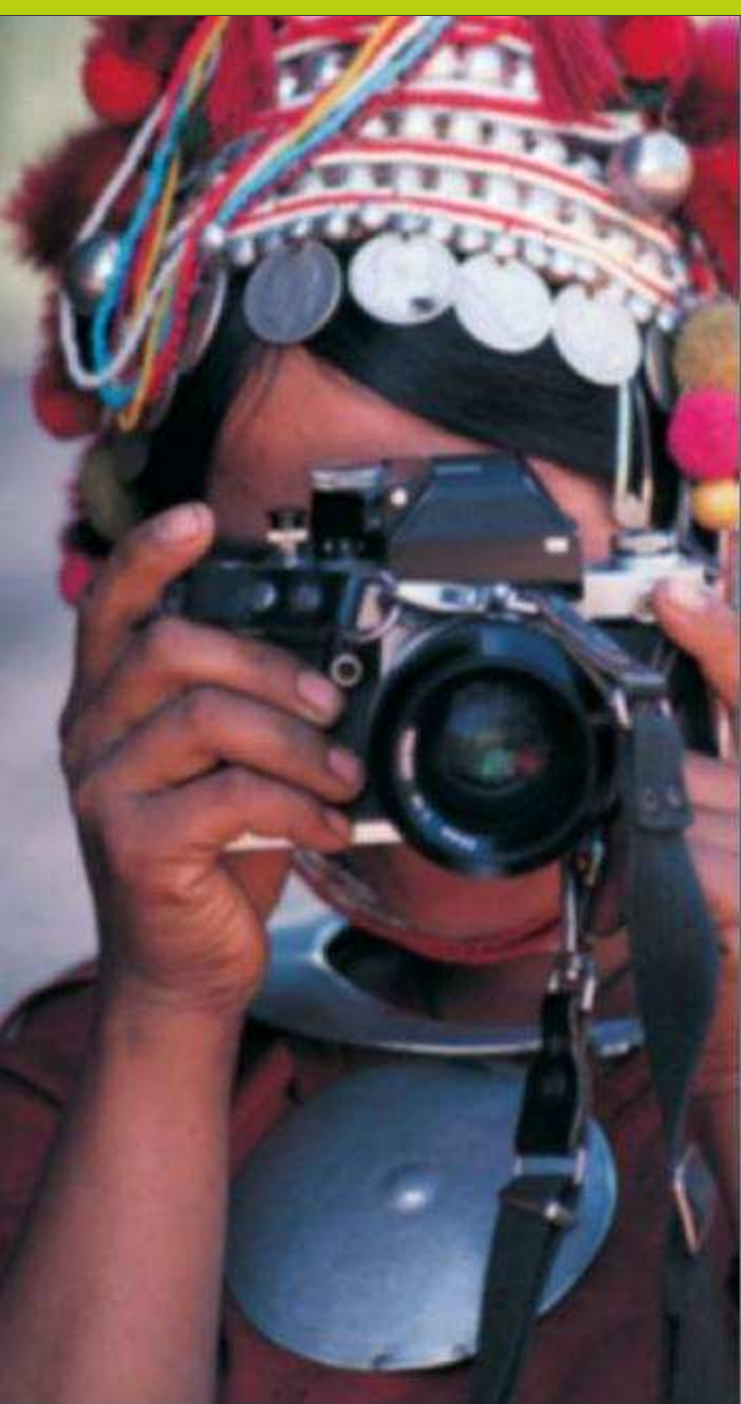
Justification for conservation



Provides local people with economic alternatives



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



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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

<http://www.travelchannel.com/video/travel-trends-2013-ecotourism>



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 Sardinia, 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!



