

The European market potential for nature and ecotourism

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Nature and ecotourism is one of the main tourism segments, which also includes adventure tourism. The products and services in this segment come in many forms, including wilderness and dark sky tourism. Attracting tourists to remote areas may disrupt their remoteness but may also offer many opportunities if you adopt practices that care for and respect nature. The Netherlands should be among your main target markets in this segment.

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1. Product description

Nature tourism, also called nature-based tourism, is tourism based on the natural attractions of an area. It consists of responsible travel to experience natural areas and their landscape, flora and fauna, protecting the environment and improving the quality of life of locals.

Ecotourism, often referred to as [sustainable tourism](#), can be considered as a specialism within nature tourism. Its focus is on learning about the environment, minimising negative impacts and contributing to environmental protection. Ecotourism is defined as 'Responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education' of all parties involved, according to the [International Ecotourism Society](#) and the [Global Ecotourism Network](#). The main attractions in the ecotourism market are marine, national parks and other parks with a protected status, biodiversity, local cultures and traditional protectors of natural environments.

Nature and ecotourism attract people interested in a variety of natural and cultural resources, including being immersed in a rich, natural, cultural or historical experience.

[Tourism New South Wales](#) identifies four main categories in nature tourism, which are presented in figure 1.

Figure 1: The categories of nature tourism

Source: [Tourism New South Wales](#)

A wide array of products falls into the category of nature and ecotourism, including consumptive and adventurous as well as non-consumptive and contemplative activities. Examples include:

- nature tours, observation of flora and fauna, cultural and [local heritage tourism](#), [volcano tourism](#);
- fishing tourism, [cycling tourism](#), [bird watching tourism](#), kayaking tourism, bush walking, hiking tourism, cold water tourism, hunting;

- visiting parks, scenic driving, photography tourism, camping;
- [beach experiencing](#), relaxing, self-improvement travel.

One specific example is the trend of [dark sky tourism](#) to [remote areas](#) with a clear view of the night sky, away from artificial light pollution. This could include stargazing, watching an eclipse, watching the Northern or Southern Lights, visiting observatories, and attending guided tours, stargazing sessions, and astronomy tours. Dark sky tourism could be facilitated by a stay in a nature accommodation, such as a yurt, connecting with the local culture, specific stargazing hotels, or even dedicated cruises.

See these products for inspiration:

- [Hurtigruten](#) and [Princess Cruises](#) offer cruises including stargazing nights. Hurtigruten also provides lectures on astronomy.
- [Elqui Domos](#) hotel in Chile has telescopes for guests in their rooms.
- [Baines' Camp](#) in Botswana, provides star baths and sky beds.

Tips:

- Offer night walks for guest to observe the sky if you are in a remote area.
- Invest in low-profile opportunities like a sky bed, if you can assure privacy and safety, including from mosquitos and your climate allows.

Another example is [wilderness tourism](#), where tourists seek undeveloped land with minimal human imprints. An example is [Wilderness Tourism Tour Company](#) in India. Tourists are drawn into these areas because of their remoteness. The downsides are the [negative effects on nature and local communities](#).

There is a wide assortment of products that relate to the category of nature and ecotourism, but keep in mind that travellers often combine products during their holidays. They also complement it with other products and services particular to the specific destination, such as culture, food, relaxation, self-improvement, accommodation, transport, etc.

Tips:

- Employ people from the local community. This contributes to the region, but also increases opportunities for community tourism.
- Offer a range of activities to your customers, especially activities involving the nature around your location.
- Promote your area's different and unique natural attractions in your marketing, including its biodiversity.
- Provide trails and routes of different lengths and difficulty levels to meet the needs of nature and ecotourists of all skill levels and ages. Make sure these trails don't endanger the local nature and its ecosystem.
- Consider producing festivals. When done well, they can contribute to local development goals. Festivals can raise awareness about local qualities and attract larger or novel target groups.
- Because nature tourism has many niche markets, offer a limited choice and fully dedicate your approach to that niche, so your product remains convincing as genuine in the eyes of travellers.

The remainder of this product factsheet focuses on the ecotourism market, sometimes also called sustainable tourism, responsible tourism, soft tourism and green tourism.

2. What makes Europe an interesting market for nature and ecotourism?

The demand for nature and ecotourism is high and will continue to grow. For some years now tourists have become more aware of leaving a positive impact on the destinations that they visit. According to the UK's Travel Foundation, 75% of British travellers wanted a more responsible vacation in 2012. Forum for the Futures, also in 2012, estimated that 66% of travellers wanted an easier way to identify a green holiday. In a 2018 Booking.com survey, 87% of global travellers said they wanted to travel sustainably. [Euronews](#) even suggests an ecotravel boom in Europe.

It is not only the type of holiday that shows signs of change, but accommodation types as well. [According to Booking.com](#), interest in a sustainable accommodation increased from 62% in 2016, to 65% in 2017 and 68% in 2018; meanwhile, the proportion of travellers who have not considered eco-friendly stays because they were unaware of their existence declined from 39% in 2016, to 38% in 2017, to 31% in 2018. These studies' results are in line with the outcomes of a survey among the readers of Condé Nast Traveler, which showed that 58% said they choose a hotel based on whether the hotel gives back to local people and the planet.

Travel companies have recently noticed an increase in the number of trips that involve trekking and hiking. For example, the number of trekking and hiking trips booked at [Jacada Travel](#) doubled between 2015 and 2016, and again between 2016 and 2017.

Based on these developments, [Virtuoso](#) considers sustainable tourism part of a global travel transformation rather than a passing trend. SKIFT suggests that sustainability will be the mark of luxury in the years to come. [Tourism New South Wales](#) considers ecotourists the early adopters of personal values which many other market segments with potentially larger visitor numbers will follow.

There are several reasons for the rise of interest in ecotourism, or sustainable, green, soft or responsible tourism. According to [Booking.com](#) tourists report:

- being impressed by natural sights during their own travels (60%);
- noticing a visible impact of tourism at the destinations they have visited (54%);
- seeing the positive effect that sustainable tourism can have on locals (47%);
- seeing the unsustainable effects of tourism in their home country (42%);
- feeling guilty about the impact their vacation has had on the environment (32%).

[Responsible Travel](#) reports that travellers are increasingly seeking opportunities to reconnect with nature, other people, and seeking their own individual meaning, which may be caused by an increasingly digitally connected, work-centric, and material world.

Another driver is [last-chance tourism](#), which is motivated by the desire to see threatened or diminishing natural attractions, including glaciers, coral reefs, endangered species and more.

Tips:

- Act sustainably and be transparent about it. Above all, promote your reuse and recycling of materials, waste management initiatives, etc.
- Offer opportunities for travellers to contribute to the natural and social values of the destination and reduce their impact.
- Developing nature-based tourism requires tailor-made approaches to fit often highly sensitive local contexts.
- Consider serious leisure and project-based leisure for visitors who are extremely interested in a particular leisure activity, even possibly hinting at a new career path. These travellers are very committed to their cause, more interested in staying longer to learn or to do more, and they are less hampered by barriers in terms of accessibility, travel time, and service level.

- Make the destination attractive by providing multiple reasons to visit: combine nature-based tourism with other types of tourism and leisure activities. Seek collaboration with other entrepreneurs within and outside the region to create routes and packages connecting points of interest.

3. Which European countries offer most opportunities in nature and ecotourism

Germany, France, the Netherlands, Belgium, Poland and the Czech Republic have the biggest share of outbound trips with nature as the primary motive. These six countries are considered the most relevant nature and ecotourism markets in Europe, with Germany standing out (see table 1).

Table 1: Top European nature and ecotourism markets

| | Outbound overnight trips 2018, in millions | Percentage of holidaymakers who see nature as a primary motive for choosing a holiday destination | Indication of number of outbound overnight trips with nature as a primary motive, in millions |
|----------------|--------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Germany | 109.0 | 15% | 16.35 |
| France | 53.3 | 14% | 7.46 |
| Netherlands | 20.8 | 25% | 5.20 |
| Belgium | 13.1 | 19% | 2.49 |
| Poland | 12.0 | 19% | 2.28 |
| Czech Republic | 7.4 | 26% | 1.92 |

Sources: Statista, Eurobarometer 432

The target market for nature and ecotourism is large. Probably the first studies conducted into the ecotourism market were the [2001 and 2002 UNWTO studies](#) in the UK, Germany, Spain, France and Italy, which have not been updated. In a 2016 TNS study, respondents in the following countries mentioned 'nature' as the [main reason for their holiday](#): Czech Republic (26%), Netherlands (25%), Bulgaria (23%), Romania (20%), Belgium (19%), and Poland (19%). Hover your mouse cursor or pointer over the map below to see the percentage of travellers who favour nature travel in each European country.

Keep in mind that these are statistics based on preferences. Because people in Western and Northern Europe generally have more money to spend, they will also spend more on nature and ecotourism as well. Keep in mind that these statistics show a preference for nature itself, not nature tourism, which also includes adventure tourism. Preferences for adventure tourism are included in [our study on adventure tourism](#).

Figure 2: Share of travellers in each EU country who saw nature as the main reason to go on holiday 2016

No data to display



based on Eurobarometer statistics

Germany

A proportion of 15% of German travellers see nature as the primary reason to visit a destination. Apparently, they are so impressed by the natural features of the destinations, that 25% mention it as a reason to return to the destination. Regardless of the duration of their holiday, most Germans like to purchase the components of their holidays themselves and separately (44% and 44% respectively). That might be the reason why the way they book their holidays is quite varied. Booking commercial services online (28%), booking private housing online (23%), booking via the counter of a travel agent (27%), and booking via a friend (26%), all have a similar share. Most Germans prefer to stay in a paid commercial accommodation such as a hotel, B&B, cruise or youth hostel, whether it is on a short (47%) or long (54%) holiday. During the orientation phase of a holiday, most Germans rely on recommendations by others (44%) or their own personal experience (39%).

Table 2: German key attitudes towards tourism

| | |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motivation: | <ul style="list-style-type: none"> • Nature as primary reason: 15% • Nature as secondary reason: 16% • Nature as primary or secondary reason: 30% |
| Most popular type of accommodation: | <ul style="list-style-type: none"> • If >13 nights: paid commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. (54%) • If 4-13 nights: paid commercial accommodation (47%) |

| | |
|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Most frequent type of holiday: | <ul style="list-style-type: none"> • If >13 nights: Tourist services purchased separately (44%) • If 4-13 nights: Tourist services purchased separately (44%) |
| Most popular destination regions with developing countries: | <ul style="list-style-type: none"> • Asia and Oceania (5%) • North Africa and Middle East (3%) • Caribbean, Central and South America (2%) |
| Most popular booking method: | <ul style="list-style-type: none"> • Online commercial services excl. private housing individuals (28%) • Through someone I know (26%) • Over the counter at a travel agency (27%) • Online commercial services - private housing individuals (23%) |
| Most important reasons to return to the destination (primary and secondary reason combined): | <ul style="list-style-type: none"> • Natural features such as landscape, weather conditions (44%) • Quality of accommodation (33%) • Cultural and historical attractions (13%) |
| Most important primary reasons to return to the destination: | <ul style="list-style-type: none"> • Natural features, such as landscape, weather conditions (25%) • Quality of accommodation (18%) • Cultural and historical attractions (13%) |
| Most important information sources for decision making: | <ul style="list-style-type: none"> • Recommendations by friends, colleagues and relatives (44%) • Personal experience (39%) |
| Region of residence: | <ul style="list-style-type: none"> • Rural area or village (41%) • Small or middle-sized town (40%) • Large town (18%) |

Source: EU

France

Of the European countries ranked in the top 6, France is where travellers least mention nature as a primary motive for visiting a destination, with a proportion of 14%. Nevertheless, natural features stand out as the primary reason to return (36%). Regardless of duration, package holidays (excluding all-inclusive packages) are

the preferred holiday format (45%–46%). So, it might not come as a surprise that most holidays are purchased online in France, via providers such as tour operators or airline companies (33%) or concerning private housing (25%). The French prefer to spend their holidays with friends or relatives (long holidays 27%, short holidays 35%) or a paid accommodation, such as hotel, B&B, cruise or a youth hostel. Friends, colleagues and relatives provide the most important source of information when the French plan for their holidays (57%).

Table 3: French key attitudes towards tourism

| | |
|-------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motivation: | <ul style="list-style-type: none"> • Nature as primary reason: 14% • Nature as secondary reason: 23% • Nature as primary or secondary reason: 37% |
| Most popular type of accommodation: | <ul style="list-style-type: none"> • If >13 nights: staying with friends or relatives (27%), and paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (26%) • If 4–13 nights: staying with friends or relatives (35%), and paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (30%) |
| Most frequent type of holiday: | <ul style="list-style-type: none"> • If >13 nights: package travel excl. all-inclusive (46%) • If 4–13 nights: package travel excl. all-inclusive (45%) |
| Most popular destination regions with developing countries: | <ul style="list-style-type: none"> • North Africa and Middle East (6%) • Asia and Oceania (4%) • Caribbean, Central and South America (3%) |
| Most popular booking method: | <ul style="list-style-type: none"> • Online commercial services such as tour operators, airline companies (33%) • Online commercial services – private housing individuals (25%) |

| | |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Most important reasons to return to the destination (primary and secondary reason combined): | <ul style="list-style-type: none"> • Natural features, such as landscape, weather conditions (58%) • Quality of accommodation (32%) • Cultural and historical attractions (36%) |
| Most important primary reasons to return to the destination: | <ul style="list-style-type: none"> • Natural features, such as landscape, weather conditions (36%) • Cultural and historical attractions (14%) • Quality of accommodation (13%) |
| Most important information sources for decision making: | <ul style="list-style-type: none"> • Recommendations by friends, colleagues and relatives (57%) • Websites collecting and presenting comments, reviews and ratings from travellers (40%) • Personal experience (37%) |
| Region of residence: | <ul style="list-style-type: none"> • Rural area or village (35%) • Small or middle-sized town (47%) • Large town (18%) |

Source: EU

Netherlands

A quarter of the Dutch travellers regard nature as the primary reason to visit a destination (25%). Twice as many refer to nature as the main reason to return: 53%. Most Dutch travellers prefer to purchase services and compose long (>13 days) holidays themselves (61%). Most holidays are booked online via commercial services, such as tour operators, airline companies, etc. (44%). The most preferred accommodation for the Dutch on long holidays is paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (55%). The decision-making process is mainly informed by recommendations from friends, colleagues and relatives (47%).

Table 4: Dutch key attitudes towards tourism

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|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motivation: | <ul style="list-style-type: none"> • Nature as primary reason: 25% • Nature as secondary reason: 25% • Nature as primary or secondary reason: 50% |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

| | |
|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Most popular type of accommodation:</p> | <ul style="list-style-type: none"> • If >13 nights paid commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. (37%) or a camping, such as in a tent, motorhome, caravan or holiday village (34%) • If 4–13 nights: paid commercial accommodation (53%) |
| <p>Most frequent type of holiday:</p> | <ul style="list-style-type: none"> • If >13 nights: package travel excl. all-inclusive (61%) • If 4–13 nights: package travel excl. all-inclusive (58%) |
| <p>Most popular destination regions with developing countries:</p> | <ul style="list-style-type: none"> • Asia and Oceania (5%) • Caribbean, Central and South America (4%) • North Africa and Middle East (3%) |
| <p>Most popular booking method:</p> | <ul style="list-style-type: none"> • Online commercial services such as tour operators, airline companies (44%) • Online commercial services – private housing individuals (27%) |
| <p>Most important reasons to return to the destination (primary and secondary reason combined):</p> | <ul style="list-style-type: none"> • Natural features such as landscape, weather conditions (53%) • Quality of accommodation (32%) • Cultural and historical attractions (31%) |
| <p>Most important primary reasons to return to the destination:</p> | <ul style="list-style-type: none"> • Natural features such as landscape, weather conditions (34%) • Quality of accommodation (14%) • Cultural and historical attractions (11%) |

| | |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Most important information sources for decision making: | <ul style="list-style-type: none"> • Recommendations by friends, colleagues and relatives (47%) • Websites collecting and presenting comments, reviews and ratings from travellers (46%) • Personal experience (29%) • Websites run by service provider or by destination (26%) |
| Region of residence: | <ul style="list-style-type: none"> • Rural area or village (43%) • Small or middle-sized town (34%) • Large town (23%) |

Source: EU

Belgium

One out of five Belgian travellers see nature as the primary reason to visit a destination (19%), while a slightly higher percentage mention it as the main reason to return (51%). If they go on a long holiday (>13 nights) they prefer a package deal (excl. all-inclusive) or to compose their package themselves staying in a commercially run accommodation (both a share of 38%). These are preferably booked via online commercial services, such as tour operators, airline companies, etc., excl. private housing from individuals: 38%. For these holidays, commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. are the most popular type of accommodation (55%). When preparing their holidays, Belgians most often rely on recommendations by friends, colleagues and relatives (51%).

Table 5: Belgians key attitudes towards tourism

| | |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motivation: | <ul style="list-style-type: none"> • Nature as primary reason: 19% • Nature as secondary reason: 22% • Nature as primary or secondary reason: 41% |
| Most popular type of accommodation: | <ul style="list-style-type: none"> • If >13 nights: paid commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. (40%) • If 4-13 nights: paid commercial accommodation (55%) |
| Most frequent type of holiday: | <ul style="list-style-type: none"> • If >13 nights: package travel excl. all-inclusive (38%) and tourist services purchased separately (38%) • If 4-13 nights: package travel excl. all-inclusive (40%) |

| | |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Most popular destination regions with developing countries: | <ul style="list-style-type: none"> • Asia and Oceania (5%) • North Africa and Middle East (5%) • Caribbean, Central and South America (3%) |
| Most popular booking method: | <ul style="list-style-type: none"> • Online commercial services such as tour operators, airline companies (38%) • Online commercial services - private housing individuals (28%) • Through someone I know (28%) |
| Most important reasons to return to the destination (primary and secondary reason combined): | <ul style="list-style-type: none"> • Natural features (51%) • Quality of accommodation (43%) • Cultural and historical attractions (34%) • General level of prices (34%) |
| Most important primary reasons to return to the destination: | <ul style="list-style-type: none"> • Natural features such as landscape, weather conditions (25%) • Quality of accommodation (17%) • Cultural and historical attractions (15%) |
| Most important information sources for decision making: | <ul style="list-style-type: none"> • Recommendations by friends, colleagues and relatives (51%) • Websites collecting and presenting comments, reviews and ratings from travellers (38%) • Personal experience (38%) |
| Region of residence: | <ul style="list-style-type: none"> • Rural area or village (45%) • Small or middle-sized town (38%) • Large town (16%) |

Source: EU

Poland

One out of five Polish tourists see nature as the primary reason to visit a destination (19%), while 58% see nature as their main reason to return. In the case of long holidays (>13 days), the Polish like to purchase and compose them themselves (45%), using online commercial services, private housing of individuals as the most frequent booking method (35%). Most Polish like to stay in a paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (43%) these long holidays. Recommendations by friends, colleagues and relatives stand out among the information sources Polish travellers rely on when making their holiday decisions (61%).

Table 6: Polish key attitudes towards tourism

| | |
|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motivation: | <ul style="list-style-type: none"> • Nature as primary reason: 19% • Nature as secondary reason: 30% • Nature as primary or secondary reason: 49% |
| Most popular type of accommodation: | <ul style="list-style-type: none"> • If >13 nights: paid commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. (43%) • If 4-13 nights: paid commercial accommodation (43%) |
| Most frequent type of holiday: | <ul style="list-style-type: none"> • If >13 nights: Tourist services purchased separately (45%) • If 4-13 nights: Tourist services purchased separately (51%) |
| Most popular destination regions with developing countries: | <ul style="list-style-type: none"> • Asia and Oceania (2%) • North Africa and Middle East (2%) • Caribbean, Central and South America (1%) |
| Most popular booking method: | <ul style="list-style-type: none"> • Online commercial services, private housing individuals (35%) • Over the phone (24%) • Through someone I know (21%) |
| Most important reasons to return to the destination (primary and secondary reason combined): | <ul style="list-style-type: none"> • Natural features, such as landscape, weather conditions (34%) • General level of prices (12%) • Cultural and historical attractions (11%) • Quality of accommodation (11%) |
| Most important primary reasons to return to the destination: | <ul style="list-style-type: none"> • Natural features, such as landscape, weather conditions (36%) • Quality of accommodation (10%) • Cultural and historical attractions (13%) |

| | |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Most important information sources for decision making: | <ul style="list-style-type: none"> • Recommendations by friends, colleagues and relatives (61%) • Websites collecting and presenting comments, reviews and ratings from travellers (36%) • Personal experience (30%) |
| Region of residence: | <ul style="list-style-type: none"> • Rural area or village (34%) • Small or middle-sized town (34%) • Large town (32%) |

Source: EU

Czech Republic

A quarter of Czechs travellers regard nature as the primary reason to visit a destination (26%). More than twice as many mention nature as a reason to return: 59%. Most Czech travellers like package travel, but not all-inclusive (36% in case of long holidays, 37% with short holidays). There are three main methods the Czech use to book their holidays: through someone they know (26%), online commercial services – private housing individuals (24%), online commercial services, such as tour operators, airline companies, etc. (24%). During these holidays most Czech opt for a paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (in case of long holidays a share of 42%, and in case of short holidays of 46%). During the preparation phase, recommendations by friends, colleagues and relatives (58%) are the most important information sources the Czechs rely on.

Table 7: Czech key attitudes towards tourism

| | |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motivation: | <ul style="list-style-type: none"> • Nature as primary reason: 26% • Nature as secondary reason: 29% • Nature as primary or secondary reason: 55% |
| Most popular type of accommodation: | <ul style="list-style-type: none"> • If >13 nights: paid commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. (42%) • If 4–13 nights: paid commercial accommodation (46%) |
| Most frequent type of holiday: | <ul style="list-style-type: none"> • If >13 nights: package travel excl. all-inclusive (36%) • If 4–13 nights: package travel excl. all-inclusive (37%) and tourist services purchased separately (35%) |

| | |
|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Most popular destination regions with developing countries: | <ul style="list-style-type: none"> • North Africa and Middle East (3%) • Asia and Oceania (2%) • Caribbean, Central and South America (1%) |
| Most popular booking method: | <ul style="list-style-type: none"> • Through someone I know (26%) • Online commercial services – private housing individuals (24%) • Online commercial services, such as tour operators, airline companies (24%) |
| Most important reasons to return to the destination (primary and secondary reason combined): | <ul style="list-style-type: none"> • Natural features (59%) • Cultural and historical attractions (35%) • Quality of accommodation (33%) |
| Most important primary reasons to return to the destination: | <ul style="list-style-type: none"> • Natural features such as landscape, weather conditions (36%) • Cultural and historical attractions (13%) • Quality of accommodation (10%) |
| Most important information sources for decision making: | <ul style="list-style-type: none"> • Recommendations by friends, colleagues and relatives (58%) • Websites collecting and presenting comments, reviews and ratings from travellers (43%) • Personal experience (42%) • Websites run by service provider or by destination (25%) |
| Region of residence: | <ul style="list-style-type: none"> • Rural area or village (34%) • Small or middle-sized town (44%) • Large town (22%) |

Source: EU

Tips:

- Target the Netherlands, one of the European countries with the highest average incomes, where tourists also have a high preference for nature. For more information, [study the Netherlands' market profile](#).
- Get certified if you own a hotel or accommodation or other tourism operator, as it will offer you [many benefits](#). Depending on the kind of certification, it shows that you comply with the highest social and environmental standards. This is highly relevant in a market where environmental concerns among tourists is increasing and certification is increasingly used as a selection criterion by holidaymakers.

- Consider [B Corp certification](#), like [Bodhi Surf + Yoga](#) has done. Learn how this company facilitates memorable learning experiences using surf, yoga, nature immersion, and community engagement, including an app for guests to use before, during and after the holiday. [This website has a database](#) of B Corp certified travel and leisure businesses in various countries.
- Promote your certification and the issuing body, especially if it is GSTC accredited. According to [Booking.com](#), sufficient information on certification is a barrier to 32% of sustainable tourists. According to the [Booking.com sustainable travel report 2019](#), 72% of global travellers say they were not aware of the existence of eco-labels for vacation accommodations; 70% of them say they would be more likely to book an accommodation knowing it was eco-friendly; 62% would feel better about staying in an accommodation if they knew it had an eco-label; and 37% state that an international standard for identifying eco-friendly accommodation would help encourage them to travel more sustainably.

4. What trends offer opportunities or pose threats in the nature and ecotourism market?

Increasing demand for sustainable holidays

Travellers are increasingly aware of and concerned with sustainability. When they choose a holiday destination, it is increasingly influenced by ethics, moral values, concerns about the environment and its ecosystems, including flora and animal protection and a desire to positively impact local communities. These travellers demand affordability and availability of environmentally friendly, sustainable and socially responsible tourism services and products. They want to reduce their holiday carbon footprint, but often want to improve the destination as well. That is why do good, feel good holidays and ecological tours are growing in popularity.

Various sources argue that ecotourists are generally willing to pay more for experiences, at least if they are authentic and meaningful, such as [the Wildsea Network](#) and [others](#). Higher revenues allow you to [hire more qualified staff and to offer better travel experiences](#). However, [costs are an obstacle for 42% of tourists to travelling more sustainably](#). Therefore, it might be easier to [target tourists with more mainstream, nature-based interests](#) and those seeking adventure activities, than ecotourists.

Among the reasons why European governments and travellers have been paying more attention to sustainability include climate change, plastic pollution, air and water pollution, land and water usage, dislocation of traditional societies, the negative impacts of overtourism on host communities, and international agreements, such as the Paris Agreement and the United Nations (UN) Sustainable Development Goals.

The UNWTO has a dedicated platform for tourism initiatives relating to the Sustainable Development Goals called [Tourism for SDGs](#). The UNWTO book [Tourism for Development – Volume II: Good Practices](#) has numerous examples of good practices. Others include:

- [Global Himalayan Expedition](#), India
- [Las Terrazas Complex](#), Cuba
- [El Carlos Ecotourism and Archaeological Centre](#), Colombia

Examples of businesses with strengths in specific areas of sustainability include:

In nature tourism:

- [La Choza Chula](#), in Guatemala, runs turtle and mangrove tours, cooking classes, homestay programmes, cultural immersion programmes, volunteer programmes. They also offer weekly English classes for their guides, funded the construction of a library, set up a mobile library, and built a computer lab and a secondary school.

- [Shewula Mountain Camp](#), in Swaziland, invites travellers to stay in their village and experience the rural lifestyle and culture of a Swazi community.

Environmentally friendly practices:

- [Uniworld Cruises](#), Ireland: environmentally friendly river cruises.
- [The Brando](#), in Tahiti, uses solar energy and sustainable coconut oil biofuel, running on 100% renewable energy.
- [Baines Camp](#), in Botswana, was built using a frame of elephant manure and recycled cans.
- [Jacada Travel](#), from London, invests in a portfolio of community projects aimed at helping fight climate change offsetting 100% of the carbon emissions from trips taken with them, including all flights.
- [The Kulala Desert Lodge](#), in Namibia, uses electric bikes for guests to explore the Kulala concession.

Protection of cultural and natural heritage:

- [Three Camel Lodge](#), in Mongolia, was built using ancient Mongolian Buddhist building techniques, without nails nor iron work.

Social responsibility and benefit sharing:

- [Aqua Expeditions](#), in Peru, has doctors on river cruises deliver medical supplies and healthcare to remote Amazon villages.
- [Children in the Wilderness](#) and [Wilderness Safaris](#): offer an environmental and life skills educational programme that inspires African children to care for their natural heritage.

Tips:

- Study the [UN Sustainable Development Goals](#), which could help you to identify short and long-term priorities. In the short term, you could start small. For example: reduce waste by implementing reusable dishes, provide clear rules for customers or involve them in contributing to sustainability in a beach clean-up or 'plogging'. In the long term, the UN Sustainable Development Goals could help you to develop a strategy that integrates protecting the destination, promoting environmental leadership and community health into the travellers' experience.
- Contribute to the local community quality of life and well-being, including economic and sociocultural well-being and fair incomes. See table 8 below for examples.
- Ecotourists generally know what they want and are quite independent. They will often plan and book their trip, travel needs and experiences themselves. So, as an accommodation or provider of local activities, make sure you have good online presence targeting this group and matching their needs.
- If you proceed with making your business more environmentally friendly or more sustainable you could try to [get it certified](#). This will make it more visible to consumers who consider these labels during the planning phase of their holidays.
- Make your business or product more sustainable by, for example:
 - Using renewable energy sources
 - Increasing energy efficiency
 - Optimising use of resources
 - Promoting environmental protection
 - Investing in waste management and minimisation, like reducing plastic waste by banning plastic straws
 - Addressing carbon emissions, pollution and littering

Table 8: Examples of initiatives contributing to local communities' quality of life

| Initiative | Country or region | Example |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|------------------------------------------------------------------------------------|
| Conservation of natural and cultural heritage and biodiversity | Romania Sumatra, Indonesia Botswana | Ecotourism Romania Bukit Lawang in North Sumatra Gudigwa cultural village |
| Participation involving the local community in planning and development | Curaçao | Kura Hulanda |
| Poverty alleviation | Various countries Kwazulu-Natal, South Africa | ST-EP initiatives worldwide Ndumo Wilderness Camp |
| Collaborating with residents and other local stakeholders businesses, including local guides, experts, local food and accommodation providers, local farms, factories, etc. | East Africa | East Africa Community Based Tourism Encounter |

Health wellness and sports holidays

Health and healthy lifestyles are becoming increasingly important in tourists' decision making. Ageing tourists, the typical lifestyles of Generations Y and Z, the growing middle class, and the technological and digital revolution, all contribute to the growing importance of the health trend. Wellness tourism in Europe is soaring. In a 2015 Eurobarometer survey of 33,000 people in 33 European countries, 13% of the respondents said that wellness, spa, and health treatments were their primary or secondary motivation to go on holiday.

Concerns about obesity, food sensitivity, and health in general, have changed people's attitudes towards healthcare, nutrition, beauty, physical activity, and overall self-improvement. This development stimulates demand for personalised health, mental well-being, clean labels, botanicals, athleisure, and home-tech health and wearables to monitor personal health.

A large part of wellness tourism and the subsector with the biggest increases over the past few years consists of people who simply want to stay healthy. This market offers lots of opportunities in nature and ecotourism for SMEs, such as:

- activities in nature in combination with wellness, such as hiking for meditation, yoga and tai chi;
- thematic health hotels in nature;
- personalised health and wellness programmes;
- rejuvenation and psychological well-being;
- meditation and yoga;
- healthy menus and cooking classes;
- mobile health monitoring;

- holistic holidays;
- wellness trips and retreats built around a specific wellness activity, from bootcamps to meditation and silence retreats in a natural environment;
- spiritual travel with an adventure component.

Tip:

- Read the [Global Wellness Economy Monitor from the Global Wellness Institute](#), which provides relevant background information on this market segment.

Overtourism

The ongoing debate on overtourism is [expected to have a positive effect on the demand for sustainable tourism](#), including nature and ecotourism that cause low impact on destinations and their natural and social environment. The increased public awareness is also motivating the travel industry to pay more attention to human rights and working conditions. The global growth of tourism overall is expected to further stimulate the debate on overtourism, its consequences, and the ways to manage it.

The overtourism problem, on the other hand, offers opportunities for businesses outside mass tourism, especially those promoting destinations that sell remoteness as a form of luxury.

Two companies that have tapped into this opportunity are:

- [Hosteria Helsingfors](#) (Argentina) – Built in the remote Los Glaciares National Park in Patagonia, this resort promotes its setting in the natural landscape, luxury services and sophisticated regional cuisine.
- [Hoanib Skeleton Coast](#) (Namibia) – Accessible only by chartered flight, deep in the Namibian desert, this resort promotes game drives for guests to appreciate the landscape and desert-adapted wildlife.

This study was carried out on behalf of CBI by [Molgo](#) and [ETFi](#).

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