Foreword

Background

In view of the sustained growth of tourism activity worldwide, it would be reasonable to assume that the ecotourism sector will develop along parallel lines. However, no extensive international market research has hitherto been conducted with a view to corroborating this hypothesis.

On the occasion of the designation by the United Nations of 2002 as the International Year of Ecotourism (IYE), the World Tourism Organization (WTO) has decided to undertake research with a view to increasing knowledge of the following seven countries in their capacity as ecotourism generating markets: Germany, USA, United Kingdom, Canada, Spain, France and Italy[1].

Market studies of this type must be based on a coordinated approach among the experts concerned, similar research methods and, more importantly, a common concept of the term «ecotourism» if they are to deliver well-founded conclusions and global recommendations. However, concepts of ecotourism clearly vary, not only from one country to another, but also within the same territory. Likewise, the specific attributes of each of the markets studied, the availability of tour operators to respond to surveys depending on whether they were run in peak or low seasons and the inclusion of ecotourism products in more general products do not permit a strict comparability of the different studies presented in this series of monographs.

Readers are therefore asked to consider the results of these studies as general trends relative to the ecotourism market, rather than absolute reference data. This is the first time that such researches have been initiated. These are pioneer studies, whose methodology and results can serve as basis for future researches in this topic.

1 Another WTO publication, prepared with the technical contributions of its Member States, is also devoted to the IYE. This publication consists of a compilation of good ecotourism practices and includes approximately fifty case studies.

Aims, definitions and methodology

After briefly summarizing the general characteristics of tourism markets, these surveys set out to analyse and evaluate, in each of the aforementioned countries, the nature tourism and ecotourism generating market, its volume, characteristics, major trends and development prospects, consumer profiles, the role of the different marketing actors, product typologies and the main communication and marketing tools used in these markets.

It was with a view to meeting these aims that WTO hired seven experts – one per country – all of whom adopted similar research methods:

- gathering the results of existing research studies with the aim of making an initial appraisal of the volume of this market;
- running consumer surveys based on a single questionnaire for all countries with a view to studying demand trends;
- running surveys among tour operators whose policies and products are commensurate, to some extent at least, with ecotourism concepts;
- studying the catalogues and brochures put out by these tour operators;
- organizing tour operator discussion forums (or focus groups) on the occasion of tourism trade fairs with a view to comparing marketing methods and results, but also with the aim of discussing the very notion of ecotourism.

It should also be noted that the same definition of ecotourism was used by all the different experts. WTO has defined this activity at two levels:

1. **Nature tourism:** a form of tourism in which the main motivation is the observation and appreciation of nature.
2. **Ecotourism:** a form of tourism with the following characteristics:

   i. All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas.

   ii. It contains educational and interpretation features.

   iii. It is generally, but not exclusively, organised for small groups by specialized and small locally-owned businesses. Foreign operators of varying sizes also organize, operate and/or market ecotourism tours, generally for small groups.

   iv. It minimizes negative impacts on the natural and socio-cultural environment.

v. It supports the protection of natural areas by:

- generating economic benefits for host communities, organizations and authorities that are responsible for conserving natural areas;
- creating jobs and income opportunities for local communities; and
- increasing awareness both among locals and tourists of the need to conserve natural and cultural assets.

The most outstanding results of the seven studies can be summed up as follows

1. The use of the term «ecotourism» in the marketing and promotional tools and used by tour operators is still relatively limited. It would appear that this term has not yet been integrated in the marketing strategies of the nature tourism sector.

2. Likewise, the tourism sector that most closely matches the concept of ecotourism represents a relatively small share of the market, an observation that is borne out by the small dimension of the tour operators that comprise this segment and the small number of tourists they cater for.

3. Conversely, these same tour operators apparently believe that the growth of ecotourism may outpace that of other tourism activities overall. Moreover, this growth appears to be consolidating irrespective of the destination considered. A priori, no world region appears to have a head-start although each region does have several landmark destinations.

4. The surveys conducted among the various audiences show that enthusiasm for nature tourism invariably goes hand-in-hand with a desire for meeting local communities and discovering different facets of their culture (gastronomy, handicrafts, customs, etc.).

5. According to tour operators, ecotourism enthusiasts are mostly people from relatively high social brackets and with relatively high levels of education; they are over 35 and women slightly outnumber men.

6. These studies also show that environmental awareness, while still in its infancy, is clearly growing.

As mentioned above, these initial findings must be confirmed on the basis of future studies. These preparatory surveys should nonetheless provide a springboard for a more in-depth examination of ecotourism markets, which will be one of the key elements of the World Ecotourism Summit to be held in Quebec, Canada, from 22 to 24 May 2002.

Acknowledgements

The World Tourism Organization would like to thank Mr. Harold Goodwin and Mrs. Claudia Townsend of the Centre for Responsible Tourism of the University of Greenwich, United Kingdom, for the preparation of this report on behalf on WTO.

The authors would like to express their gratitude to Mr. Richard Hearne and other members of the AITO Responsible Tourism committee for giving them the opportunity to talk to AITO members about their opinions and experiences of ecotourism. Mr. Keith Richards and Mr. David Parrish were very helpful in allowing the time and opportunity to speak to the ABTA Council of Regions members for the purposes of this research. Mrs. Debbie Carson did a sterling job in pursuing tour operators and in pushing up the response rate.

The World Tourism Organization and the authors are particularly grateful to all those tour operators who generously gave their time to complete the survey questionnaire and to attend the two focus group meetings.

Research for this report was undertaken by a team of English experts commissioned by the World Tourism Organization, under the supervision of Mr. Eugenio Yunis, Chief, Sustainable Development of Tourism, WTO and Mr. Augusto Huescar, Chief, Market Intelligence and Promotion Section, WTO.
Mr. Philippe Lemaistre, Programme Officer at WTO, reviewed draft texts, tables and final editing of the report.

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Executive Summary

This report examines the scale and character of the market for ecotourism and ecotourism oriented products in the United Kingdom. It is one of a series of studies being conducted under the auspices of the World Tourism Organisation for the International Year of Ecotourism in 2002.

The overseas travel market from the UK is significant; overseas holidays taken by UK residents numbered 27.25 million in 1997. Of these 27.25 million overseas holidays, at least 14 million were package tours, accounting for 51% of overseas holidays of four nights or more. Total UK spending on overseas tourism was £17 billion in 1997, of which an estimated £2 billion (12%) was spent on holidays to developing countries. In 2000, 83% of UK package holidaymakers travelled to Europe, 17% ventured further. 26% of package holidaymakers aspired to go to Australia and New Zealand, 20% to tropical islands, 16% to North America. Whilst 10% did mention Asia, Central & South America were mentioned by only 4% and Africa by only 2%.

There is general acceptance (95%) of the definition of ecotourism adopted for the International Year of Ecotourism. UK operators consider that the most important elements of the definition are minimising negative impacts on the natural and socio-cultural environment; generating economic benefits for local communities and conservation through employment and other income opportunities; and increasing awareness of the conservation of natural and cultural assets, amongst both tourists and locals.

Only 12% of those responding to the postal survey of tour operators reported that they use the concept in their marketing literature. Only 3.5% of the brochures of the 200 companies offering nature-based tourism in the UK mention ecotourism; 7.5% use responsible tourism. 11% mention sustainable tourism and 12% mention environmental tourism.

Seventy-five tour operators (37.5%) of the 200 operators offering nature-based tourism experiences do use some elements of ecotourism in their marketing materials which implies that they see a marketing advantage in pointing out their policies and actions to potential clients.

Significantly in the postal survey 19 operators (46%) said that they used the concept of responsible tourism and 34% said that they used sustainable tourism. This may reflect a shift in thinking towards responsible and sustainable tourism – the brochures all went to print many months before the postal survey was conducted.

In the UK Market place, campaigns by NGOs and the impacts of general consumer trends towards ethical consumption have combined with increasing awareness of corporate social responsibility. This has led to increased awareness of, and interest in, responsible and sustainable travel in the industry and amongst consumers. There is increasing concern about the terms and conditions of employment of tourism workers in the destinations, the preservation of the local environment, and the consumption of locally-produced goods and services. Recent surveys by the Association of British Travel Agents (ABTA) and by Tearfund report that UK holidaymakers are prepared to pay a premium of perhaps 5% for guarantees in these areas.

Tearfund, a development charity working with partners around the world in healthcare, urban renewal, conflict and justice, environment and agriculture, education and training and tourism carried out studies of ethical tourism in 2000/2001. The research found that UK holidaymakers valued good information on the destination, a significant opportunity to meet local people, measures to minimise environmental impacts and the company's ethical policies. Respondents to the Tearfund survey rated these dimensions of their holiday as more important than whether or not they had travelled with the company before. This realisation has been instrumental in the decision of the Association of Independent Tour Operators (AITO: 150+ members) to adopt a responsible tourism policy, and in the launch of responsibletravel.com, a market place for responsible tourism.

The survey of package holidaymakers conducted for this report found that 26% of the sample had been motivated to choose their holiday by their wish to see different landscapes and scenery, wanting to find out about other cultures, seeing wildlife and enjoying nature in a wild state, or wanting to experience adventure in a natural environment. This 26% of the package holidaymakers is the ecotourism orientated part of the UK market, although the orientation of many of these respondents may be regarded as emergent or weak.

The overwhelming majority of respondents to the postal survey expect the nature tourism and ecotourism markets to grow, and they report that over the last five years their numbers of these kinds of tourists have increased.

However, nature-based tourism is a small niche, with 54% of respondents sending less than 500 clients on such trips in the last year (19% reported sending over 1,000). When asked what percentage of their nature-based clients were ecotourists, 73% of operators estimated that 50%+ of their package travellers were ecotourists. Their estimates for the proportion of independent tourists travelling with their company who were ecotourists was lower (53%).

Ecotourists tend to be over 35, slightly more women than men, with the higher social classes being strongly represented.

The majority of ecotourism experiences are taken as part of focussed nature tourism holidays. Average length of stay is reported by operators as 3-14 days in Europe and 8-21 days beyond Europe. Seasonality is relatively flat.

30% of the 200 nature tourism brochures indicated that the company concerned limited group sizes. Of the 75 ecotourism oriented operators 47% have a policy of limiting group size. The next most significant management measure taken to limit impact is guidelines for staff and travellers. 31% of the 200 nature tourism operators said in their brochures that they were supporting the maintenance of natural areas, 30% that they generate economic benefits, and 29% that they use local products.

34% of the nature tourism operators say in their brochures that they are increasing awareness of natural and cultural conservation amongst their travellers. 13% were making efforts to do this amongst local communities as well. In the postal survey of ecotourism oriented companies two thirds of respondents reported supporting local conservation efforts and local communities.

Operators ranked being in wilderness areas and viewing wildlife as the most important elements of an ecotourism trip, with meeting indigenous people and seeing their culture coming third. The major difference between the expectations of nature tourists and ecotourists according to the operators surveyed was in the transport used.

48% of the 200 brochures surveyed featured the education and/or interpretation aspects of the trips.

Ecotourism oriented operators tend to be small, with 75% of companies employing 10 or less staff. 52% of respondents reported carrying less than 500 passengers.

47% of operators reported finding National Tourist Offices useful in representing destinations in the UK market.

Word of mouth is the most important marketing channel for UK ecotourism oriented operators, followed by advertising in specialist magazines and the company brochure. Travel agents, fairs/promotional events and affinity groups are regarded as the least successful.

The report concludes with some suggestions about intelligence and promotional channels for those seeking to sell ecotourism products and services in the UK market (§5.5).