

# Entering the European market for nature and ecotourism

European nature travellers and ecotourists are keen to enjoy immersive travel experiences in natural surroundings, travelling ecologically and sustainably to destinations with a good reputation for best practices in ecotourism. There are several nations that are recognised for their sustainable tourism product such as Costa Rica, and an increasing number are adopting sustainable credentials. However, it is a crowded marketplace of specialist tour operators and independent travellers, including older ecotourists as a key consumer segment that is prepared to pay for an authentic experience, provided the eco-credentials are good.

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## 1. What requirements must nature and ecotourism travel products comply with to be allowed on the European market?

Nature and ecotourism is an important sub-segment of the broader adventure travel niche. European tour operators that specialise in selling nature and ecotourism holidays and trips are bound by strict regulations to ensure the safety of their travellers while travelling overseas and to protect them financially. This means they will expect their foreign suppliers to adhere to their own codes of conduct and/or terms and conditions. As you will be selling your nature/ecotourism travel product to them, it is important that you understand what they are.

### What are the mandatory requirements that buyers have?

The mandatory requirements for nature and ecotourism travel products are common across the adventure tourism sector. You should read the CBI's [What requirements must tourism services comply with to be allowed on the European market](#) and familiarise yourself with the comprehensive details of legal, non-legal and common requirements.

They cover:

- The European Package Travel Directive
- General Data Protection Regulation (GDPR)
- Liability Insurance and Insolvency Protection

### What additional requirements do buyers have?

#### Sustainability Certification

For most tourism suppliers today, not just those that work in the nature and ecotourism segment, embedding sustainability into core policies is increasingly becoming a requirement. However, if you are specifically selling an ecotourism holiday, trip or experience, sustainability must be at the heart of your offer. The actions you promote must be visible, measurable and transparent. Climate change has become a major issue in Europe and is a topic that is generating constant publicity, and governments are taking action. Europeans are very environmentally conscious, and there are some reports that say that 1 in 5 Europeans are choosing not to travel by air.

Destinations that operate under sustainable principles that help to empower local communities and protect the environment are more likely to benefit from European travellers who seek to minimise the impact of their travel. Major travel companies are increasingly demanding their suppliers to be certified as sustainable:

- TUI, Europe's largest tour operator, expects all its accommodation providers to be sustainably certified by a standard recognised by the Global Sustainable Tourism Council (GSTC).
- Leading cruise line Royal Caribbean Cruises announced that operators of shore excursions will gain preferential buying treatment if they are a supplier that is certified sustainable.

**It is highly recommended that you become a certified sustainable tourism provider if you are to succeed in this niche.**

The [GSTC](#) manages the [GSTC Criteria](#), the global baseline standards for sustainable travel and tourism. It also acts as the international accreditation body for sustainable tourism certification, and most sustainability schemes adopt the GSTC criteria as the basis for their own schemes. The criteria serve as the basis upon which sustainability in tourism is developed, and are arranged in four pillars:

- Sustainable management
- Socio-economic impact
- Cultural impact
- Environmental impact, including consumption of resources, reducing pollution, and conserving biodiversity and landscapes

Some of the leading certification programmes are outlined below.

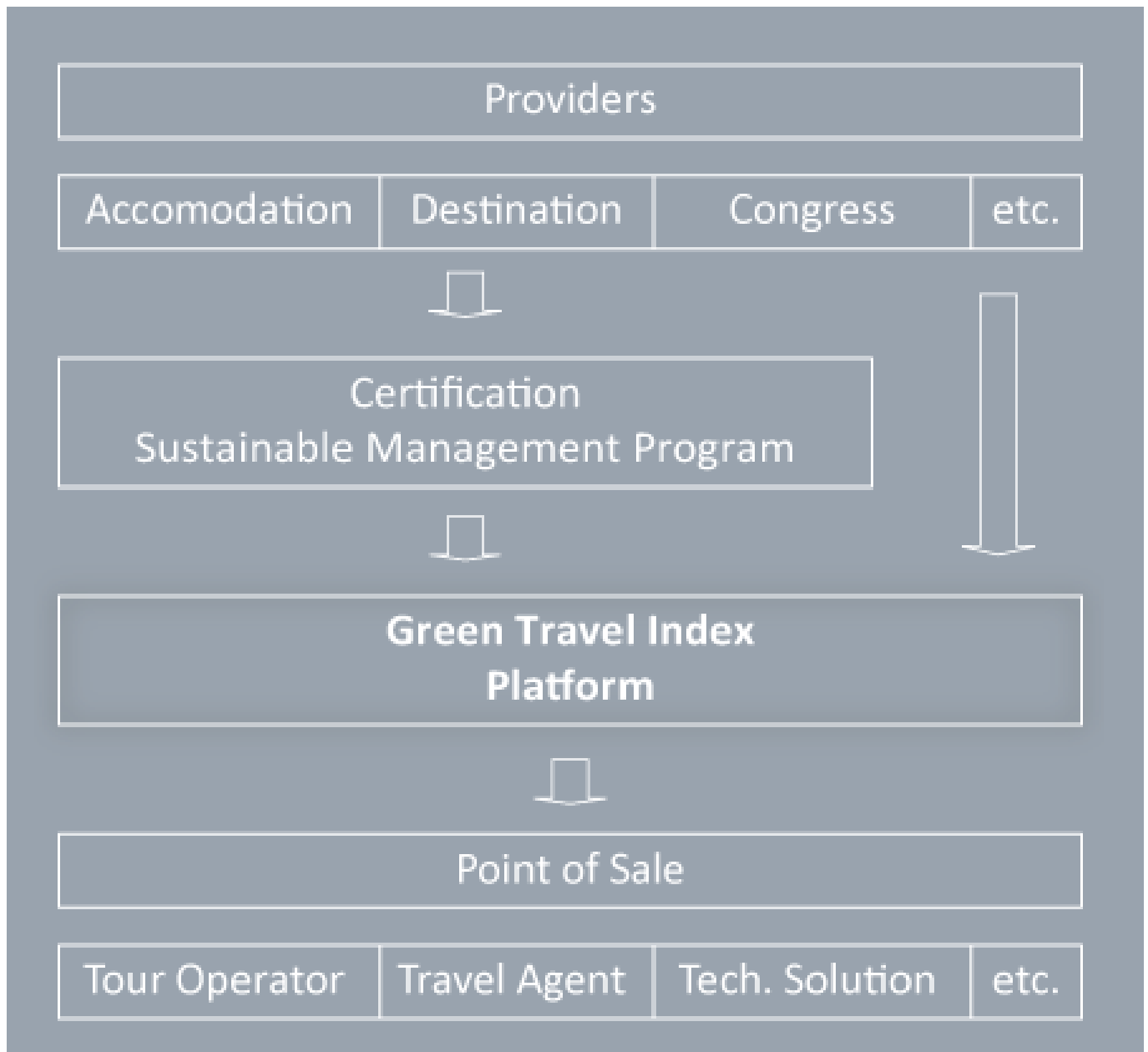
[Travelife](#) has specific schemes for [tour operators and travel agents](#), [hotels and accommodations](#) and also for [travellers](#), which showcases the hotels that meet Travelife's gold award criteria. [EarthCheck](#) offers a particularly rigorous certification programme that has a more scientific focus for travel and tourism businesses. [Green Globe](#) has established an internationally recognised Standard for Sustainable Tourism while the [Rainforest Alliance Certified seal](#) is awarded to farms, forests and tourism enterprises that meet their standards.

[Green Key](#) is an eco-label awarded to tourism providers around the world such as hotels, hostels, small guest houses, campsites, restaurants and attractions.

The [EU Ecolabel for Business](#) is recognised across Europe at both business-to-business (B2B) and business-to-consumer (B2C) levels. In tourism, the EU Ecolabel is a voluntary tool that is available to tourism accommodation providers. It is measured by the EMAS system (EU Eco-Management and Audit Scheme) to evaluate, report and improve environmental performance. If you are an accommodation provider, [EMAS](#) offers helpful advice on best practices to make your establishment greener, which you can apply to your business as a first step.

The [Green Travel Index](#) is a B2B global platform that aims to connect sustainable tourism products with mainstream tourism. Several major German tour operators have signed up to the scheme, including [DERTouristik](#) and the [FTI Group](#), and they offer detailed information about their sustainability actions. The flowchart below shows how the Green Travel Index connects from you as a tourism provider to the point of sale, usually a tour operator or travel agent.

Chart 1: Process of Connecting Sustainable Tourism Products to the Travel Industry



Source: Green Travel Index

### Tips:

Consult the [GSTC Industry Criteria for Tour Operators](#) or the [GSTC Industry Criteria for Hotels](#) to see what you need to do to become certified.

To find out how to develop your sustainable practices, download [Euromonitor's How to Become a Sustainable Brand](#).

Research the different schemes on the market to decide which one suits your business best. Make sure that the one you choose adheres to the GSTC criteria.

### Sustainability schemes at regional levels

As well as the global schemes, there are regions and countries that have established schemes at a local level.

You should explore some of these schemes that have been developed in various destinations around the world.

The [Certification of Sustainable Tourism \(CST\)](#) in Costa Rica is a sustainability programme that focuses on achieving balance between three areas in tourism – natural and cultural resources, the improvement of the quality of life for local communities, and making an economic contribution to other national development programmes.

[Smart Voyager](#) is South America's sustainable tourism certification programme for tourist boats, tour operators and hotels operating on the continent. Smart Voyager Tierra is aimed at hotels and tourist operations while Smart Voyager Galapagos is for tourist boats. The aims of each include improving the quality of life for local residents, reducing the ecological impact of tourism, enabling tour operators to directly contribute to the economy and environment, and offering travellers the chance to make a positive contribution to the people and wildlife.

Austrian-funded [TourCert](#) has developed its own internationally recognised consultancy and certification system for the tourism sector. It has implemented a region-wide sustainability scheme for Peru, Ecuador, Colombia and Costa Rica. Currently, TourCert is working with the Ugandan tourism industry to implement a sustainability scheme.

[Fair Trade Tourism](#) is a non-profit organisation promoting best practice responsible tourism in countries in southern Africa, specifically South Africa, Madagascar, Mozambique and Zimbabwe. It also has formal recognition agreements with equivalent benchmarked certification programmes in Namibia, the Seychelles, Botswana, Kenya and Tanzania. [Ecotourism Kenya](#) is a national scheme promoting responsible tourism practices, while [Responsible Tourism Tanzania \(RTT\)](#) is an association of voluntary members who believe in a sustainable approach to tourism in Tanzania.

### Tip:

Consult the website of [Sustaining Tourism](#), which features information about sustainability schemes, case studies of destinations and a wide range of tips that may help you make decisions regarding sustainability.

## ISO 14000 - Environmental Management Standard

ISO is an independent, non-governmental, international organisation with a membership of 164 national standards bodies. ISO standards are voluntary, consensus-based and market-relevant International Standards, to ensure that products and services are safe, reliable and of good quality. They help companies to access new markets and facilitate trade by improving standards and offering continuity between organisations.

The ISO 14000 family of standards provides practical tools for businesses including tour operators who are looking to manage their environmental responsibilities. The ISO 14000 standard was revised in 2015. Consult the [ISO 14001:2015](#) and be sure to watch the video on the website entitled, [Why is this standard so important?](#)

### Tips:

Download the [Free Guide](#), which outlines what you need to know to get started.

Consider purchasing the ISO 14001:2015

## What are the requirements for niche markets?

### Community-based Ecotourism (CBET)

Visits to ecotourism destinations often involve a community element, and it is sometimes referred to as community-based ecotourism (CBET). CBET has a focus on the empowerment of the local community while also protecting and conserving the local natural and cultural environment.

Community activities that provide positive experiences for the visitor are the same as CBT (community-based tourism), such as visiting festivals and markets, staying in local homestays, buying and trying local produce, making handicrafts and conducting village tours. The community provides its skills as guides, hosts, demonstrators and sellers to the visiting travellers. With the added component of ecotourism, environmental protection is integrated within the community's everyday management, which further minimises the negative impact of tourism.

CBET should be developed under the following principles:

- The project should be kept under local ownership and control
- Activities should have a minimal impact
- The project should build environmental and cultural awareness and respect
- It should provide positive experiences for both visitors and hosts
- Direct financial benefits for conservation must be provided
- It should provide financial benefits and empowerment for local people
- The whole project should raise sensitivity to host countries' political, environmental and social climate.

Costa Rica is one of the leading ecotourism destinations in the world, and most of its ecotourism experiences involve local communities. [ACTUAR \(Costa Rican Association of Rural and Community Tourism\)](#) is a locally owned community association that supports a network of over 40 partner communities in Costa Rica. The association offers a range of trips that offer an authentic experience of Costa Rican culture while promoting a harmonious relationship between conservation and rural development. ACTUAR is CST certified at the highest level of 5 leaves. The association is currently building a website.

Ecotourism in India has emerged as an important way to empower local communities, particularly those located in or near wildlife and natural areas. This article, [India Ecotourism Leads to Community Economic Development](#), describes how ecotourism and community participation is helping to enhance local skills and develop local economies.

#### Tips:

Assess whether your experience could be considered a CBET project, using the checklist above.

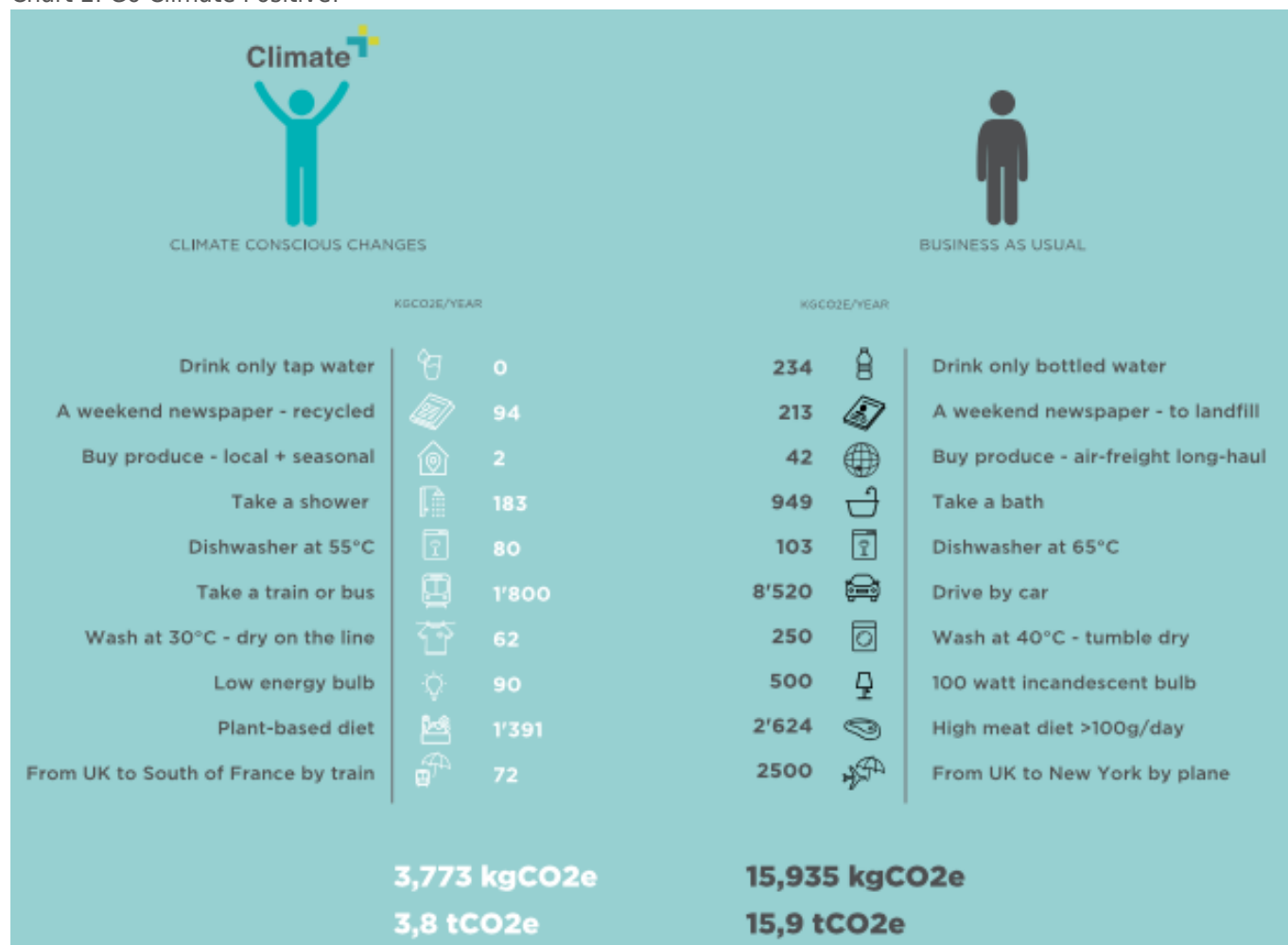
Find out if there is a local association in your region that promotes local CBET initiatives. Contact them to see if you can join.

### Reducing the environmental impact of holidays

Tourism in developing countries and remote destinations relies heavily on air travel, which is widely known to be a major contributor to harmful carbon emissions. It is estimated that aviation accounts for at least 2% of global carbon emissions and this figure is set to rise. European travellers feel guilty about air travel. The messages in the press and on social media are hard-hitting, and they are routinely encouraged to make changes to their

lifestyles, indicated in the infographic below. They know that if their small efforts are combined with thousands of others wanting to make a difference, this could have a profoundly positive impact on reducing global carbon emissions.

Chart 2: Go Climate Positive!



Source: Gold Standard

Notes: kgCO2e – kilograms of carbon dioxide equivalent; tCO2e – tonnes of carbon dioxide equivalent

To offset this 'guilt', research has shown that travellers are increasingly keen to book their holidays through a company that has an active policy to reduce environmental impact. As a result, many European tour operators now make overt contributions to schemes to compensate their companies' carbon footprint. There are numerous examples.

Adventure operator [World Expeditions](#) states that its trips and holidays are 100% carbon neutral. It does this by making contributions to forest protection projects in Zimbabwe and Tasmania, and renewable energy projects in China and Vietnam. The operator is also the founding partner of [10 Pieces](#), a litter collection initiative that encourages travellers to make a positive impact on the places they visit by taking out more than they take in.

New to the market, Online Travel Agency (OTA) [Much Better Adventures](#) channels 5% of its revenue into conservation projects via donations and campaigns in three areas of carbon mitigation, benefiting local communities and supporting conservation work.

Many operators also expect their suppliers to reduce their environmental impact. Europe's largest tour operator, TUI, has a Code of Conduct for its suppliers. [TUI's Code of Conduct, Section VI](#) is concerned with Environment

and the Community. You should read this, so you know what they expect from you.

### **Tips:**

Research what offsetting schemes or charities exist in your country that you could sign up to. Examples in developing countries include [Carbon Tanzania](#) and [Community Carbon Trees](#) in Costa Rica.

Make sure you prominently display logos and include offsetting information on your website.

## **2. Through what channels can you get nature and ecotourism travel products on the European market?**

### **How is the end-market segmented?**

Nature and ecotourism travel is a key segment of adventure tourism. As a result, the market for nature and ecotourism travel shares many characteristics with adventure tourism.

However, an ecotourist's primary motivation is to travel sustainably, stay in ecolodges or accommodations that can prove high levels of sustainability, or camp wild and 'leave no trace'. Making a positive contribution to local communities is also important to them. Ecotourists will also generally have a secondary reason for travel, which is typically to immerse themselves in local cultures and engage in outdoor activities in pristine environments.

Therefore, while they share many of the same characteristics with the adventure tourist, European ecotourists fall into two major groups.

- The Older Ecotourist represents the largest group. Aged between 50 and 70, they have money to spend and time to travel. They are experienced travellers, are well-educated and affluent, and are looking for new, authentic and immersive experiences. They are prepared to spend more for an authentic, unique experience and are typical consumers for luxury ecolodges. Comfort and luxury are important to this group.
- The Younger Ecotourist is a smaller group with less money to spend and limited travel time. Aged between 25 and 50, they are professionals, generally well educated and increasingly discerning about what they spend their money on. They are environmentally conscious and are likely to be making changes to their lifestyle to address climate change. The actions you take to make your experiences sustainable will be especially important to this group. This group likes comfort, but will also be satisfied by basic facilities as long as they are clean and functional.

Both groups of ecotourist are likely to travel either as Fully Independent Travellers (FITs) or in small groups as part of a specialist packaged nature or ecotourism trip.

### **Tips:**

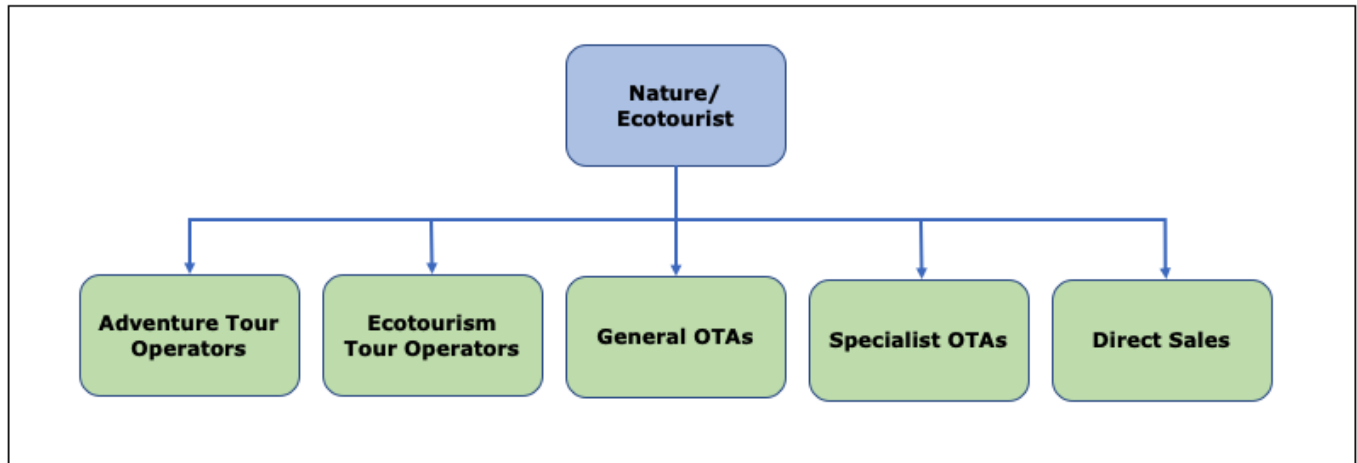
Read more about these groups. The CBI has published several studies about promising traveller markets including [Senior Travel](#), [FITs](#) and [Generation Y \(Millennials\)](#).

You can find out more about the adventure tourist and the adventure tourism segment in the [CBI's Market Analysis and Entry Reports for Adventure Tourism](#).

## Through what channels do nature and ecotourism travel products end up on the end-market?

European tour operators, travel agents and online travel agents (OTAs) comprise the main structure of nature and ecotourism travel tourism products to the European market. A further strand are the direct sales from local providers, ecolodges and Destination Management Companies (DMCs) to ecotourists.

Chart 3: Sales Channels for Nature/Ecotourism Holidays



Source: Acorn Tourism Consulting

- Adventure operators offer a wide range of holidays in the sector that cover both the primary and secondary reasons for ecotourism travel. Therefore, most major adventure operators will include those that also offer birding, hiking and trekking and wildlife holidays as significant parts of a nature or ecotourism trip.
- Ecotourism operators are a smaller group of specialist operators and may include ecolodges that offer both accommodation and tours of their local environment to view the wildlife. Therefore, this type of operator could also be considered as your competitor.
- OTAs that offer experiences to travellers including 'outdoor activities', which comprise a significant part of their itineraries. 'Animals' and 'Sports & Outdoors' are key segments for Airbnb Experiences, which lists more than 1,000 animal experiences on its site. Well-known OTAs offering experiences include [Airbnb Experiences](#) and [TripAdvisor Experiences](#) (also [Viator](#)).
- Specialist OTAs There are a number of OTAs that specialise in sustainable and eco-adventures. Many of them will be looking for new suppliers, including the UK's [Responsible Travel](#) and US-based [Lokal Travel](#), which both sell to the European market. [Mynatour](#) specialises in ecotourism and responsible travel, and is expanding its remit beyond Europe to destinations including Guatemala and India, while [Keteka](#) promotes sustainable tours in Latin America. [Safari Bookings](#) specialises in trips to Africa and is a well-respected OTA.

### Tips:

To understand the process by which ecotourism and adventure travel products are sold on the European travel market, you should read the [CBI's Market Entry Report for Adventure Tourism](#).

To find new buyers, read [CBI's Tips for Finding Buyers in the European Tourism Sector](#).

## What is the most interesting channel for you?

While OTA's offer a relatively quick and easy way to get your product on the market, it is important that you also develop strong business relationships with specialist tour operators, so that you have another sales outlet. Consult the [CBI's Tips for Doing Business with European Tourism Buyers](#) and [CBI's Tips for Organising your Tourism Exports to Europe](#) for more information.



### 3. What competition will you face on the European nature and ecotourism market?

#### Which countries are you competing with?

The nature and ecotourism market is large and present in most countries in the world. However, few destinations collect data that enables them to segment leisure arrivals by nature or ecotourism.

Therefore, any analysis of the competing market for nature and ecotourism involves consulting various qualitative sources that range from research studies, country tourism strategies and ‘best of’ listings online and in the press. Taking into account the factors discussed above and applying some regional filters, you should consider your primary competitors for nature and ecotourism to be:

Table 1: Primary Competitors for Nature and Ecotourism in Developing Countries

Country	Region
Costa Rica	Central America
Ecuador and the Galapagos	South America
Guyana	South America
Kenya	East Africa
Palau	Pacific
Vietnam	Southeast Asia

Source: Acorn Tourism Consulting

Tip:

Keep up to date with any emerging ecotourism destinations by conducting your own internet research on a regular basis.

#### Costa Rica

Costa Rica was one of the first countries in the world to embrace ecotourism and is recognised for pioneering the global trend. Development of the sector commenced during the mid-1980s, and ecotourism grew rapidly during the 1990s. Today, tourism is one of the country’s largest exports, and accounts for 5.5% of Costa Rica’s GDP. It is estimated that half of all tourist arrivals engage in ecotourism activities. Its [Certification for Sustainable Tourism \(CST\)](#) programme is recognised by UNWTO as the model for sustainable tourism practices in the region and it is used by several other countries in South America.

Costa Rica is fortunate that it is a ‘hotspot’ of the world’s greatest biodiversity, and there are more than 160 national parks, refuges and other protected natural areas that account for almost 26% of Costa Rica’s landmass.

The country's sustainability model is one of integrated development with a key emphasis on the responsibility to maintain environmental integrity and develop local cultural traditions. The model presents considerable opportunities for ecotourists to enjoy an outstanding immersive experience in the natural environment and within local culture and society.

## Ecuador and the Galapagos

The Galapagos Islands are one of the world's best-known destinations for nature and ecotourism on account of its incredibly rich flora and fauna. Tourism income is essential to support the monitoring and protection of the Galapagos National Park Islands, but arrivals have been increasing greatly, particularly land-based visitors who are deemed less 'responsible' than ship-based tourists, whose numbers have stagnated. Initiatives to manage high tourism numbers have been implemented, including limiting visitor numbers at sites, planning boat routes, introducing visitor fees to the National Park, only allowing guided visits and establishing urban development zones.

## Guyana

Guyana is a fast-emerging ecotourism and adventure destination. It has made considerable efforts to adopt sustainable destination management, development and marketing best practices throughout all its tourism operations and programmes. In 2019, the country won several important awards, giving Guyana global recognition of its outstanding ecotourism credentials, including the [Best of Ecotourism in the Green Destinations Award](#) at the world's largest trade travel show, ITB in Berlin.

Guyana has consolidated and strengthened its tourism message across core brand pillars of Nature & Wildlife, Culture & Heritage, Active Exploration, Birding and Conservation, which appeal to the adventure, nature and ecotourism market. To find out more about how Guyana has developed its strong sustainable tourism credentials, you can consult the [Living Guyana Tourism Strategic Action Plan 2018-2025](#).

## Kenya

Ecotourism in Kenya is a mix of public and private initiatives that revolve around Kenya's iconic African wildlife that live in the country's 54 national parks and reserves, along with a number of private and community-owned ranches and sanctuaries. Ecotourism and sustainability are built on four principles: environmental conservation, education and empowerment, social responsibility, and cultural and heritage preservation. The Kenya Tourist Board introduced its [Eco-Rating Scheme](#) for accommodation providers in 2002. In 2016, Kenya's tour operators signed up to become [Travelife certified](#), chosen because of European familiarity with the scheme.

Ecolodges are common in Kenya, and they actively conserve water and adopt sustainable energy sources. Some ecolodges are collaborations between local communities that provide the land and work on the project, and investors that help fund and manage the project. Others are entirely owned by the community. Ecotourism in Kenya also helps minimise conflicts between humans and animals over territory and natural resources, which are both detrimental to conservation efforts. You can read more about Kenya's sustainable developments in the Kenya Tourism Board's [Sustainable Tourism Report 2016](#).

## Palau

An island nation in the Micronesia region of the Pacific Ocean, Palau has actively been developing conservation initiatives to protect marine resources and promote ecotourism to generate revenue. It was declared a National Marine Sanctuary in 2015. Visitor numbers have increased significantly in recent years to visit the extraordinary marine environment of coral reefs and fish species. In 2017, Palau launched an 'eco-pledge' system, whereby all visitors to the islands sign a 'promise' in their passports to respect the pristine environment during their visit. The Palau Pledge also has a [sustainable tourism checklist](#) to ensure that visitors:

- Don't collect marine life souvenirs
- Do support local businesses and communities

- Don't feed the fish and sharks, or touch or chase wildlife
- Don't drag fins over coral when swimming, or touch or step on coral
- Do learn about the culture and people
- Don't litter

## Vietnam

Vietnam is a destination exceptionally rich in culture and with extensive and dramatic natural attractions. Research found that nature was particularly important to European visitors, and ecotourism is one of the four core tourism assets under its slogan, 'Vietnam Timeless Charm'. The mountainous region of northern Vietnam is particularly good for nature and ecotourism. It is home to several ethnic minority tribes and is popular for trekking through paddy fields, visiting villages and staying in homestays.

In addition to these primary competing destinations, you should consider others. Independent research often forms the basis by which Europeans select the ecotourism destinations to visit. They will use a variety of sources including tour operator websites, recommendations from family and friends, and 'best of' lists that are regularly published on the Internet. In addition to those listed above, the destinations most often mentioned for their nature and ecotourism offers between 2017 and 2019 include:

- Rwanda
- Tanzania
- Brazil
- Cambodia
- Kenya
- Bolivia
- Nepal

[The Travel and Tourism Competitiveness Index \(TTCI\)](#) is produced by the World Economic Forum (WEF) and measures factors and policies to assess the development and competitiveness of 140 countries. A country's travel and tourism competitiveness is measured against 14 pillars, including Environmental Sustainability and Natural Resources. The report states that the South American region (including Central America) has the highest rating for natural resources in the world and is known for its abundant wildlife and rich cultural assets. However, countries in the region are often challenged by lower scores for Environmental Sustainability.

Table 2: Developing Countries ranked by Environmental Sustainability and Natural Resources

Country	TTCI Region	Environmental Sustainability	Natural Resources	Total Score
Brazil	South America	4.3	5.8	10.1
Mexico	North/Central America	3.9	6.0	9.9
Costa Rica	North/Central America	4.9	4.9	9.8
Tanzania	Sub-Saharan Africa	4.4	4.7	9.1
Peru	South America	4.4	4.7	9.1

Kenya	Sub-Saharan Africa	4.5	4.5	9.0
Colombia	South America	4.4	4.4	8.8
Panama	North/Central America	4.7	4.0	8.7
Ecuador	South America	4.3	4.2	8.5
Thailand	Southeast Asia	3.6	4.8	8.4
India	South Asia	3.6	4.5	8.1
Indonesia	Southeast Asia	3.5	4.5	8.0
Zambia	Sub-Saharan Africa	4.4	3.6	8.0
Malaysia	Southeast Asia	4.0	3.8	7.8
Namibia	Sub-Saharan Africa	4.3	3.5	7.8
Egypt	North Africa	4.7	3.0	7.7
Zimbabwe	Sub-Saharan Africa	4.1	3.6	7.7
Botswana	Sub-Saharan Africa	4.3	3.4	7.7
Senegal	West Africa	4.6	3.1	7.7
Cameroon	West Africa	4.4	3.2	7.6
Sri Lanka	South Asia	4.0	3.6	7.6
Guinea	West Africa	4.5	3.1	7.6
Morocco	North Africa	4.5	3.1	7.6
Honduras	North/Central America	4.5	3.1	7.6
Nepal	South Asia	3.5	3.9	7.4
Rwanda	Sub-Saharan Africa	4.5	2.6	7.1
Tunisia	North Africa	4.4	2.6	7.0

Lesotho	Sub-Saharan Africa	4.8	2.2	7.0
The Gambia	West Africa	4.4	2.3	6.7

Source: Travel & Tourism Competitiveness Index 2019, WEF

A number of global organisations host annual travel awards that generate positive publicity for operators and destinations. Such awards provide an indication of development in the sector over the year.

Table 3: Award-Winning Destinations in Developing Countries, 2018-2019

Most Sustainable Destinations 2019*	Leading Green Destinations 2018**
Guyana	Ecuador
Republic of Palau	Bolivia
Chumbe Island, Tanzania	Costa Rica
Galapagos National Park, Ecuador	Fiji
Bardia National Park, Nepal	Madagascar
	Peru

Sources: \*2019 Sustainable Top 100; \*\*World Travel Awards

## Which companies are you competing with?

### Companies in Costa Rica

Ecotourism companies in Costa Rica include a number of community-owned ecolodges. Costa Rica is well-known for its luxury ecolodges such as [Lapa Rios](#), voted the #1 hotel in Central America and #9 in the world by travel publication Travel+Leisure in 2019, and [Tree House Lodge](#). Lapa Rios uses tourism as a tool to protect the surrounding environment and the 17-bungalow lodge preserves more than 1,000 acres of primary and secondary rainforest and supports the development of the local community. The Tree House Lodge is a collection of beach-front houses on the Caribbean coast that have been constructed using wood from fallen trees, recycled materials for roofs and are all solar heated. Both lodges are CST certified and have been awarded the Five Sustainability Leaf Award of the ICT (Costa Rica Tourist Board).

Other local travel companies offer a broad range of packages and trips, and ecotourism is generally included as a theme. [Imagenes Tropicales](#) is one example and has been promoting ecotourism since 1996. It offers tailor-made ecotourism packages throughout Costa Rica. Its website outlines its commitment to sustainability in the country and actively encourages guests to travel sensibly.

### Companies in Ecuador and the Galapagos Islands

[Nature Galapagos & Ecuador](#) offers a range of unique and authentic travel experiences in Ecuador and the Galapagos Islands. Trips including island hopping, diving experiences, adventure tours and cruising, and there is a focus on enriching experiences through local involvement with the community. Most trips have standard

itineraries but can be personalised according to need, and some of its tours are also featured on OTAs such as Viator. The company owns two tourist standard hotels on the Islands on Isabela Island.

[Galapagos Alternative](#) was founded to help visitors view the Islands through the eyes of locals. It offers land-based experiences to enhance the cultural experience and enable travellers to support local businesses. The company is located centrally on Santa Cruz and visits to the other islands are on day trips or overnight. Trips are led by professional guides and boats are operated by responsible operators. The company does not book individual day tours; it focuses exclusively on full trip itineraries.

## Companies in Guyana

Ecolodges are becoming more common in Guyana, and the award-winning [Surama Ecolodge](#) offers accommodation and tours. It is wholly community owned and managed by the Amerindian community of Surama in the Rupununi district. It offers basic but comfortable accommodation and immersion in and learning about the community are key aspects of a stay at the ecolodge.

[Wilderness Explorers](#) is a Guyanese DMC that also operates internationally in the region. It focuses on providing ecologically sensitive tourism through a responsible attitude towards the environment. Communities are involved in tourism provision, so they benefit financially and also provide a high standard of service demanded by the international market. The company is a member of [ATTA](#) and [LATA](#) and its tours have been featured in the National Geographic's Tours of a Lifetime.

## Companies in Kenya

[Il Ngwesi](#) is wholly community owned by the local Maasai community and was built using local materials. Profits from the lodge, donations, and partnerships with local and international NGOs support a range of community projects and help to sustain the environment and the resident wildlife. There is much international acclaim for Il Ngwesi, on account of how successful the lodge has been in engaging with local communities in remote places. It has been operating for nearly 25 years, and in 2017 was featured in National Geographic's *21 Places to Stay If You Care About the Planet*.

[Cottars Safari Service](#) is one of Kenya's oldest tourism companies, and is an award-winning ecotourism company operating in the Masai Mara National Reserve. Visitors are charged a fee for wildlife conservation, which is shared with local communities and helps develop an area next to the reserve as a way of expanding the area under conservation. Visitors are also encouraged to bring items from their home countries to donate to local communities, such as school supplies.

## Companies in Palau

Since Palau is an island nation, tour operators in Palau focus their tours around the water. [Fish'n'Fins](#) offers a range of trips and experiences, with a focus on conservation; the company established the Micronesian Shark Foundation. It has won numerous awards, including TripAdvisor's Certificate of Excellence in 2018 and features many satisfied customer reviews.

## Companies in Vietnam

[Topas Ecolodge](#) in North Vietnam is recognised as a Unique Lodge by National Geographic. It was constructed on sustainable principles to minimise the impact on the surrounding environment and employs local people. The lodge only uses local product, and it features a wastewater facility to avoid polluting the area. [Vietnam Ecotourism](#) is a local travel company that connects local tour operators and accommodation providers with the traveller. The organisation donates some of its profits to local communities and eco projects.

[Sapa Sisters](#) is an ethnic minority Hmong trekking group based in the mountainous highlands of Sapa and is run entirely by women. The organisation was established to ensure fair wages and to promote the empowerment of women in the region. The success of the business has resulted in other organisations implementing fair pay

schemes.

### Tip:

See how all these different organisations promote themselves through their websites and identify if there is anything you could adapt for yours.

## What products are you competing with?

While nature and ecotourism are a sub-segment of adventure tourism, products on the wider adventure tourism market are your biggest competitors. There is so much choice for the European traveller, and sustainability is rapidly becoming an essential feature of many adventure trips. This means that you will have to work hard to create a Unique Selling Point (USP) to differentiate your travel product from others on the market. To find out more about creating a USP, you can read [CBI's Tips for Doing Business with European Tourism Buyers](#).

You should also carefully consider CBT experiences, as they are closely aligned with nature and ecotourism. Many nature and ecotourism operators combine an element of CBT within their experiences.

Deciding how to package your tourism trip or experience could help you stand out from the competition. If there are lots of ecotourism experiences locally that also focus on nature, consider including an element of CBT and brand it as 'CBET' to help create a different product. If your region is popular among adventure tourists, perhaps consider adding an adventure element to your ecotourism trip as an 'added extra'.

### Tips:

Conduct a SWOT analysis to identify the Strengths, Weaknesses, Opportunities and Threats of your business. SWOT analyses are common business tools used to aid in creating a clear development plan for businesses.

Research what other operators and providers are doing in your area to gain an understanding of what your competitors are doing. This research will ensure that you have a thorough understanding of the market in your area.

To find out more about the adventure market, consult the [CBI's Entering the European Market for Adventure Tourism](#).

## 4. What are the prices for nature and ecotourism travel products on the European market?

European ecotourists want to make a difference. They want to know that the tour operators they choose are also helping to make a difference. Therefore, they expect a portion of the price they pay to contribute to environmental sustainability and/or community development. As such, they are therefore prepared to pay for an experience that they know will make a difference.

As a segment of adventure tourism, nature and ecotourism products are packaged and priced similarly. Accommodation is usually the largest component and could account for as much as 60% of the overall cost. In an ecolodge, the proportion may be more significant if it is the primary reason for the trip. Environmental

contributions and community benefits are usually included in the cost of the stay.

Other factors that contribute to nature and ecotourism pricing strategy include:

- Quality of guides: professionally trained, qualified, multi-lingual, experienced naturalists
- Quality of services: trained staff in accommodation, tours carefully planned by knowledgeable staff, provision of additional activities
- Availability and reliability of transfers for international travellers
- Local transportation costs: travel to remote areas can be very expensive. In Guyana, it is only possible to reach many of the top nature destinations by air.
- Quality, standard and safety of local transport, and knowledgeable drivers.
- Food and beverages if included. Supply should be locally sourced if possible.

Table 4: A Selection of Prices for Nature and Ecotourism Experiences in Competing Markets, 2019

Nature/Ecotourism Trip	Country	Duration	Guide Price per person (€)
Day/Part-day Experiences			
Scarlet Ibis Tour	Guyana	Day trip	40.00
CBT Experience at Rancho Quemado	Costa Rica	Day trip	46.00
Manuel Antonio Park Nature Guided Tour	Costa Rica	4 hours	54.00
Mount Longonot Hiking and Lake Naivasha Boat Tour	Kenya	Day trip	64.00
Rock Island Tour	Palau	4 hours	130.00
Galapagos Hopper Island Tour	Galapagos	9 hours	229.00
Kaieteur Falls Day Trip	Guyana	Day trip	260.00
Short Trips (2-5 days)			
Stay at Pachamama Ecolodge (Peak Season)	Costa Rica	2 nights	104.00
Mai Chau Discovery in Mai Chau Ecolodge	Vietnam	1 night	220.00
Guyana Nature Experience Tour	Guyana	3 days	322.00
Phong Nha - Ke Bang National Park	Vietnam	3 nights	342.00



Ecotour in Costa Rican Rainforest	Costa Rica	4 days	377.00
Galapagos Island Hopping	Galapagos	4 days	807.00
Safari in the Ol Kinyei Conservancy Wilderness	Kenya	3 nights	1,024.00
Rupununi Experience at Maipaima Ecolodge	Guyana	5 nights	1,284.00
Nature/Ecotourism Holidays (1-2 weeks)			
Kaieeteur Overland	Guyana	8 days	1,621.00
Discover Costa Rica	Costa Rica	15 days	2,487.00
Classic Kenya Safari	Kenya	7 days	2,603.00
Wild Costa Rica, Well Off the Beaten Track	Costa Rica	12 days	4,169.00
Guyana Nature Experience	Guyana	14 days	4,823.00
Wildlife of the South and Western Galapagos Islands	Galapagos	10 days	5,786.00
Galapagos Cruise and Land Safari	Galapagos	13 days	7,014.00
Small Group Wildlife Conservation Safari	Kenya	14 days	13,878.00

Source: Acorn Tourism Consulting

Notes: Research conducted online in October 2019 with various tour operators. Guide prices exclude international airfares.

### Tips:


Set transparent prices for your trips. Make sure to be clear how the trip contributes to environmental sustainability and/or community development.

Read [CBI's Organising your Tourism Services Export](#) for more information about setting prices.


This study has been carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

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