



# CBI Product Factsheet: Nature and Eco-tourism tourism from Germany, the Netherlands, Spain and the UK to Latin America

## 'Practical market insights into your product'

Germany, the Netherlands and the UK are the strongest nature and eco-tourism markets and pressure is increasing from the travel trade in these countries for suppliers to improve their sustainability credentials. The older demographic of well-off, experienced travellers from these markets are typically motivated by the high quality experience a nature and eco-tourism trip can offer, especially to lesser known destinations in Latin America. Although Spanish travellers are also looking for unique and authentic experiences they are less concerned about sustainability. Latin America has a strong reputation for delivering high quality nature and eco-tourism experiences in destinations including Costa Rica, Ecuador and the Galapagos Islands and Brazil. There is scope for other destinations that can offer a superior product to benefit from these markets.

### Product Definition

**Nature tourism and eco-tourism** are closely related and both are examples of responsible travel.

- **Nature tourism** is responsible travel to natural areas, which conserves the environment and improves the welfare of local people based on the natural attractions of an area. it includes a wide range of sub-categories such as bird watching, terrestrial and marine wildlife, botanical tourism, hiking and trekking.
- **Eco-tourism** is "responsible travel to natural areas that conserves the environment and improves the well-being of local people." (The International Ecotourism Society - TIES).

**Principles of Ecotourism:** Ecotourism is about *uniting conservation, communities, and sustainable travel* to follow ecotourism principles to:

- Minimize impact.
- Build environmental and cultural awareness and respect.
- Provide positive experiences for both visitors and hosts.
- Provide direct financial benefits for conservation.
- Provide financial benefits and empowerment for local people.
- Raise sensitivity to host countries' political, environmental, and social climate.



## Traveller profile

**Eco-tourists cover an increasingly wide spectrum of travellers motivated by the experience nature and eco-tourism can offer.** They are broadly similar to nature tourists who are motivated by the natural environment of the places they visit and are interested in learning about the local communities who reside there. They are looking for an experience that cannot be provided by a mass-market holiday.

**Eco-tourists** travellers fall into two broad categories:

- **Dedicated eco-tourists** whose primary motivation is to choose a holiday that is sustainable. They are more concerned about sustainability than comfort and have high expectations and do not want to compromise or feel their holiday is 'green washed'. This is a small segment (10-20%) of the market; the segment is largest in the Netherlands and smallest in Spain.
- **'Soft' eco-tourists** who are motivated by the experience and quality that an eco-holiday can deliver. They are not necessarily very knowledgeable about responsible tourism but would like to do the right thing and rely on the tour operator to deliver a responsible tourism experience. This is the largest group (80-90%) and has most growth potential.
- **Nature tourists** cover a wide range of sub-niche markets including bird watching, marine and terrestrial wildlife enthusiasts who are travelling specifically to view wildlife, or a particular species, although they may include some other secondary activities. Each of these 'sub' markets are substantial eg, in the UK for example bird watching is considered to be one of the fastest growing hobbies.

## Demographic characteristics

Nature and eco-tourists are well-educated, well traveller consumers from the higher socio-economic groups that come from all age groups. They are prepared to pay more than general tourists for a high quality nature and eco-experiences. Three main demographics segments are relevant to the nature and eco-tourism sectors:

- **Younger travellers:** 18-30 year olds and the 31-44 year olds who can be differentiated into:
  - **Young professionals who have high income but limited time to travel.** They mostly travel in couples, although there is also a singles market in this age group, and are looking for unusual experiences and want to fit as much into their holiday as possible. The experience and comfort of an upmarket eco-tourism holiday appeals to

## Consideration for Action

- If you are targeting this market ensure you can support any claims you make about sustainability and apply for sustainable accreditation.
- It is the experience, rather than the environmental credentials of a nature and eco-tourism holiday that appeal to the broad range of tourists that book these holidays. Your sustainable credentials need to be clearly identified but focus on promoting the experience you can offer different market segments eg, families, honeymooners, singles, birdwatchers, wildlife enthusiasts, walkers.
- If you have a high quality nature product that meets the needs of one or more of the sub-categories it is more effective to target those specific markets rather than promote your business under the broader 'nature tourism' category.
- Tour operators that target this market are now packaging 'Once in a lifetime' holidays highlight the unusual experiences they offer.
- Single travellers want opportunities to meet other travellers of a similar age, for example in small group activities or learning experiences. They also look for holidays that do not charge them supplements for being a single traveller.

them, but sustainability is not their main motivation.

**- Backpackers and gap year travellers** who are travelling between their studies or during a career break. Their daily budgets are small as they travel over extended periods, from a month to a year. They choose cheaper accommodation and want to engage with the local communities they visit and experience local activities and products. They may combine their travels with volunteer work on conservation projects. The majority of these young people will continue to travel in the region for extended periods. They are keen for their family and friends to know about the life-changing experiences they are having.

- **Families with children older than 8 years old** who are looking for experiences they can enjoy with their children, they are particularly interested in activities that combine fun and excitement with learning. Health and safety are also a consideration for this segment. Dutch parents are most interested in taken nature or eco-holidays with their children.
- **'Empty-nesters' aged 45 to 65 from Germany, Netherlands and UK** markets are the largest demographic groups. They are still healthy and their children have left home, giving them more time and disposable income. They are experienced travellers and have high expectations of quality and value for money although they are happy to pay more for high quality nature and eco-experiences.

#### Geographic characteristics

- **Spain has a younger demographic** with 30-40 year olds being the largest demographic group. It also has a historic and linguistic relationship with Latin America which is of potential interest to this market.
- **German, Dutch and British holidaymakers are key target groups.** Little detailed data is available on the demographic of nature and eco-tourists to Latin America. However research from other destinations (eg, US and Australia) shows that nature travel from North European markets including Germany and Switzerland and the UK are amongst the strongest

- Although backpackers have low budgets they will stay for longer than main stream holidaymakers if there is enough for them to do in an area and will spend money on exciting 'one off' experiences that they can't do elsewhere. Work with other local businesses to promote a mix of suitable accommodation and activities that will appeal to this market.
- Finding suitable conservation for volunteers and promoting them to backpackers can encourage these travellers to stay longer.
- Backpackers and young professionals can be excellent ambassadors for your business if you can get them to write reviews, tell their friends about their amazing experiences on social media networks such as Facebook and post their photos and videos on sites such as Facebook, Instagram, YouTube or Pinterest.
- Well off families look for exciting experience that will broaden their children's knowledge of the world. Look at the tours offered by tour operators who specialise in this segment in your target market to see if you can offer what they need.
- If you target families emphasise activities that are designed with children in mind, particularly access to animals and wildlife and any learning experiences. Parents are protective of their children and will want to know what safety measures are in place.
- A combination of unique, authentic experiences combined with cultural and soft adventure activities appeal to this market and should be emphasised in any marketing materials. However this group also have high expectations of quality and value for money.
- If your destination lies in a yellow fever vaccination area, you may not want to focus on people over 65 years of age as yellow fever vaccinations are not recommended for people over 65.

markets. (Source: the hummingfish foundation  
<http://hummingfish.org/cbet/about-ecotourists/>)

## Product Specification

- **Quality.** Nature and eco-tourists are prepared to pay more to use travel companies that strive to protect and conserve the environment, provided that the tour operators deliver the quality of experience that these European consumers expect.
- **Authentic experiences** are central to the quality expected by eco-tourists who prefer local guides, small groups, remote destinations and meaningful educational content.
- **Price sensitive and value for money.** The European markets have all been affected by the recession since 2009, Spain in particular. The socio-economic group that will take an eco-tourism trip to Latin America still have disposable income, but are careful about how they spend it and want to feel that they are receiving value for money even for an expensive holiday.
- **Sustainability** is more important for nature and eco-tourists than for other sectors. Dutch and German travellers are most concerned about sustainability. Responsible tourism is increasingly important to tour operators, particularly among specialist adventure and nature operators that use the 'responsible tourism' banner as a selling point for many trips.
- **Independent travel versus package travel.** Nature and eco-tourists are most likely to book independently, buying direct from local incoming tour operators and accommodation providers, in destinations they are familiar with. The Spanish, in particular, mostly book their holidays directly and as they are familiar with the language in Latin America they may also feel confident booking their own arrangements. However as most of these European travellers have not been to Latin America before and repeat visits are low, booking through tour operators will be relatively higher compared to more familiar and accessible destinations in Asia such as Thailand.
- **Tailor made flexible itineraries** are increasingly popular with experienced travellers who want to have an individual itinerary but prefer a specialist to arrange and book it for them.

## Considerations for action

- Review how you operate your business and identify the existing sustainable practices you already use and your relationship with local communities. Find out what you would need to do to achieve sustainability accreditation from schemes such as Travelife or Rainforest Alliance TOPs membership.
- If you employ local people and are involved with their training mention this on your website. This can be done by including a short profile of some of your local staff that includes what they do, where they live and the communities they come from.
- Ensure that you can substantiate any claims you make about your sustainable business practices. Beware of 'greenwashing'. Consumers are getting increasingly aware of businesses that make claims about 'green credentials' that are not genuine. These businesses are likely to get poor reviews on consumer feedback sites eg, TripAdvisor which may have a negative impact on their reputation.
- It is important to respond quickly to both direct enquiries through your website or by email and from tour operators. The European travel market is very competitive and tour operators and travellers will soon look for alternatives if they do not receive a reply from a query within about 24 hours.
- If you want to sell your products through the travel trade and work with European tour operators it is essential to understand how the industry works, for example relevant commission rates, competitive pricing, quality and health and safety standards.
- The tour operators that are organising tailor made/ Fully Independent Travel (FIT) usually need good local partners to help them organise these individual trips. Look at the websites of tour operators offering this service to see whether you have the type of product that would meet their customers' needs.

- **Language** English is widely used by German and Dutch travellers. Webpages and other promotional material can therefore be in English, however some German content would add appeal particularly for the older German nature travellers and other German speaking markets.
- **German speaking markets** include not only Germans but also the Swiss and Austrians. The Swiss in particular have not suffered from the economic recession to the degree felt in most other European countries and although it is a small market the Swiss have relatively high levels of disposable income making them a potentially lucrative market. German tour operators may also have offices in these territories making them easier to reach.
- **Health and safety** procedures are important particularly for nature activities that involve close encounters with wildlife and for soft adventure activities. Travellers expect the company and guides to have a good knowledge of potential risks and how to manage them.

#### Legal requirements

- **No legal requirements.** There are no legal requirements for long haul tourism as it is offered outside the EU market. However, there are some EU travel and consumer laws that are applicable to tourism within the EU, for example the Travel Package Directive that protects consumers who contract package travel within the EU.
- **An increasing number of British, German, Dutch and Spanish tour operators expect their suppliers to have liability insurance.** Most British, German, Dutch and Spanish travellers purchase travel insurance before going on holiday. However tour operators across the EU are increasingly asking potential suppliers and local partners to have liability insurance to cover possible damage and accidents involving their customers, especially for travel outside the EU. This is because their own liability insurance does not usually cover damage caused by third parties. Liability insurance maybe difficult to obtain in Latin America but suppliers with this insurance will have a great advantage.

#### Non-legal requirements

- **The travel trade in the Netherlands, Germany and the UK is primarily driving the growth of responsible tourism** and sustainable certification. To deliver the quality and standards required they are increasingly choosing suppliers that do more for their environment, wildlife and local communities.

- Nature and wildlife activity and tour providers should provide guides and instructors that speak good English for all markets. If you specifically want to target the German, Dutch or offering German guides would be advantageous.
- Use English on your website and other marketing materials. If you are considering targeting the German market include Switzerland and Austria.
- Tour operator partners will want to see your health and safety policies and independent travellers will be reassured to be able to find these policies on your website.

#### Considerations for action

- Study the [Travel Package Directive](#). Although it is not applicable to long haul tourism, it can help you to better understand the EU tourism market.
- Study the terms and conditions of the main EU tour operators as these reflect EU travel and consumer laws and will give you an understanding of what they expect from their local suppliers.
- Communicate to your customers the importance of obtaining travel insurance, especially if your company does not have liability insurance.
- Obtain liability insurance and communicate to (potential) partners that you have such insurance.
- If it is not possible to purchase liability insurance in your country, constantly lobby your authorities and trade associations to make such insurance possible. Also discuss it with (potential) British, Dutch, German and Spanish partners as they might have some influence.

#### Considerations for action

- Familiarise yourself with the requirements of sustainability certification eg, Travelife to understand what is expected from suppliers and integrate sustainable elements into your product.
- Implement sustainable best practices or apply for sustainable certification. For more information, refer to CBI's study

- **Sustainability labels.** British, Dutch, and German nature and eco-tourism tour operators are increasingly looking for sustainable partners. Latin American nature and eco-tourism providers can use this to their advantage by making their products more sustainable. Examples of credible sustainable and/or green tourism certification programmes are Green Globe, Rainforest Alliance, STEP and Travelife and TourCert in Germany. There are also local sustainability initiatives, for example, Smart Voyager in Ecuador and CST in Costa Rica, TOPS (Tour Operators promoting Sustainability) in Nicaragua.

#### **Germany**

- **DVR is the German Travel Association.** It is a leading trade advocacy group and represents a large proportion of Germany's tour operators and travel agents.

#### **Netherlands**

- **ANVR membership is standard for Dutch tour operators.** Membership of the Dutch Association of Travel Agents and Tour Operators (ANVR) is seen as standard. However the majority of ANVR's members are generalists and many specialised tour operators are not members as requirements are too high, especially financially. However, this does not mean that they would not be interesting partners.
- **The Dutch travel trade is very committed to sustainability.** The Netherlands is the only country in Europe where all tour operators, through the ANVR, have signed an agreement with Travelife.

#### **Spain**

- Travelife has recently been introduced to Spanish tour operators but uptake is very low in comparison to the other European markets.

#### **UK**

- **ABTA** is the UK's leading travel association. Booking a holiday through an ABTA member gives consumers' financial protection and works to raise standards, including sustainability, in the industry.
- **Association of Independent Tour Operators (AITO)** represents 120 independent tour operators that specialise in destinations or types of holidays including wildlife holidays. AITO has had a responsible tourism policy since 2000 and has developed a classification system based on a 1-5 star rating to help monitor and progress sustainable tourism issues. Their Sustainable Tourism Committee advises, encourages and assists its members to progress responsible tourism.

#### **'Sustainable Tourism Certification (Incubator market)'**

- Find out if your country has its own sustainability label and apply for the label for your business. Also, make sure that your business is visible on their website.
- Only register with recognized labels. Dutch, German and British travellers are cautious about sustainability labels and will probably check the credibility of your sustainability label.
- Target specialised niche nature and eco-tourism tour operators.
- Many of these Dutch tour operators that operate in Latin America may not be members of ANVR.
- Check that any UK travel business you are working with is a member of ABTA as 70% of British consumers consider ABTA membership to be essential when booking their holidays.
- Use the AITO website to find specialist tour operators that could make good partners.
- Contact AITO to get their advice on the actions you could take to meet their member's requirements.

For more information about the expectations of tourism buyers in the EU+EFTA tourism market in general, refer to CBI's 'Buyers' Black Box' for tourism.

## Trade and Macro-Economic Statistics

### Outbound travel statistics

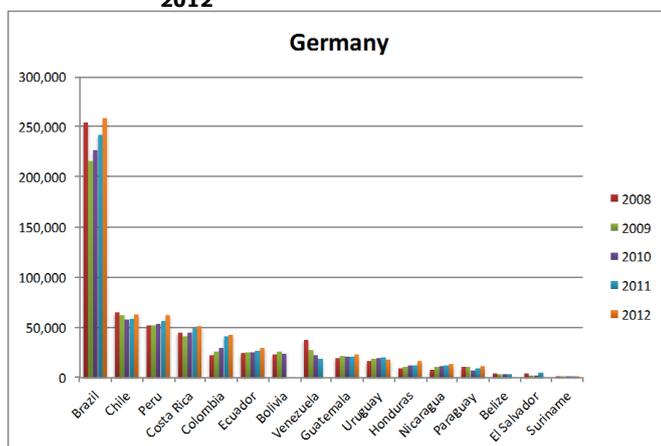
- Estimate of global market size - a niche market that is difficult to measure.** The term ecotourism is often labelled responsible and/or sustainable tourism and as such, the markets are similar and overlap. As a niche market, there is a lack of hard statistical data on ecotourism so it is difficult to measure its size. The data that is collected does not usually distinguish ecotourism from nature tourism, responsible tourism and possibly adventure tourism. There are various estimates of the global size of the market:

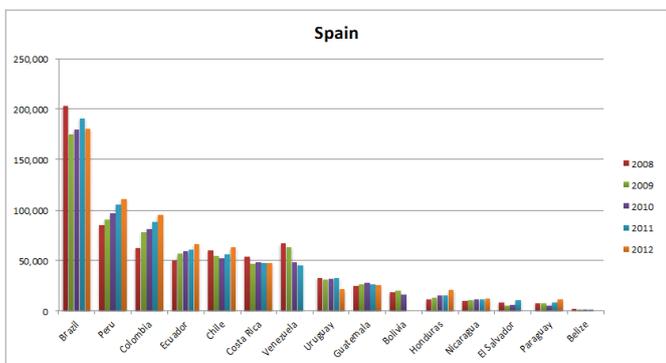
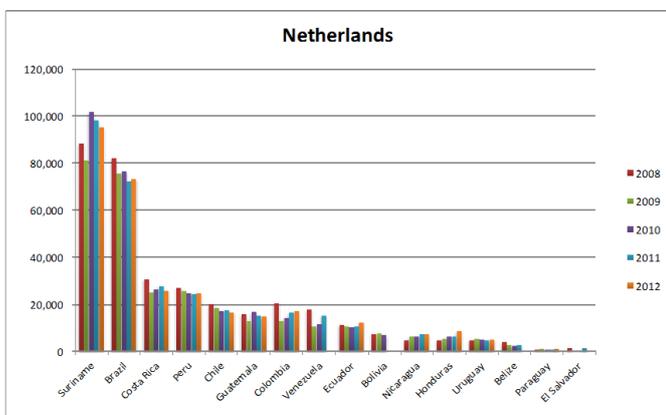
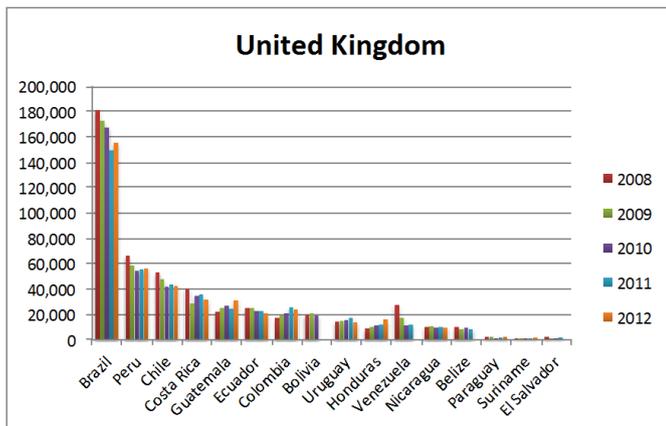
  - **Nature tourism** accounts for 20% of global tourism in many areas, and is growing three times as fast as the industry as a whole, according to the UNWTO.
  - **Socially and environmentally responsible** forms of travelling accounts for 15% of the global tourism market, and continue to grow at the rate of 30% every year according to TIES. The majority of these socially and environmentally responsible travellers will also be nature travellers for some or all of their holidays.
  - **Ecotourism is growing significantly** and the future for the industry is strong, with experts including the Worldwatch Institute predicting growth rates of between 20-34% annually. UK research specialist Mintel agrees, predicting 25% year-on-year growth rates. Equally positively, the Voluntary Initiative for Sustainability in Tourism (VISIT) estimates that ecotourism will account for 5% of the global travel market by 2024.
  - **Key source markets** tend to be from developed nations where there is an increasing awareness of the need for responsible tourism. The key international markets include the UK, Germany, and the Netherlands.

### Considerations for action

- The global nature and eco-tourism market is expected to continue to grow and be an increasing proportion of the total tourism market. As the market grows, sustainable business practice is more likely to become standard practice and tour operators from the major source markets will expect their suppliers to provide evidence of their sustainable actions. Familiarise yourself with the standards expected and start to plan what actions your business needs to take to become accredited.

**Figures 1-4: Outbound trips per Latin American country\*, for all purposes, 2008-2012**





Equivalent data for Argentina is not available. It is estimated to be between Brazil and Peru.  
Source: UNWTO

- **Germany is the largest outbound travel market in the EU** with over 85.7 million trips in 2012.
- **Germany, Spain and the UK are the three larger markets to Latin America**, with Netherlands generating fewer visits.
- **South America appeals to nature and eco-tourists.** As nature and eco-tourism becomes an increasingly popular, destinations offering good nature and eco-tourism infrastructure, such as South America, can be expected to grow and European airlines, such as KLM, are

- Considerations for action**
- Promote nature and eco-tourism to the German market, the largest in the EU.
  - Germany, Spain, the UK and the Netherlands are all strong potential markets to target if you have the resources. If you have limited budget focus on the market where you have good connections or speak the language.

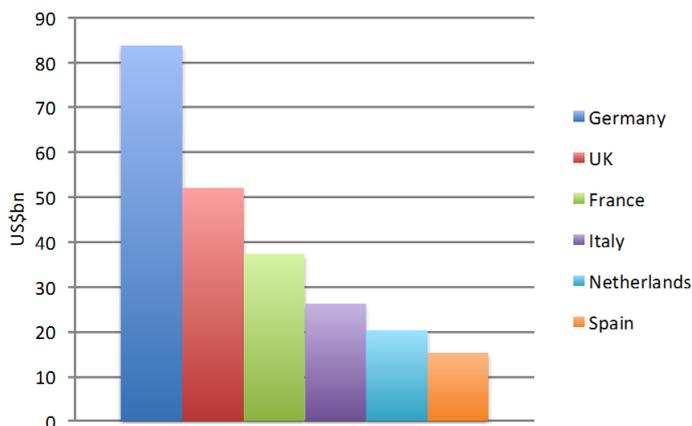
improving access by expanding their flights to South America.

- **Popular Latin American destinations.** **Brazil, Argentina, Peru, Chile and Costa Rica** are the top five most popular destinations in Latin America for visitors from Germany and the UK. In addition, the Netherlands' top destination is Surinam due to the historic ties between the two countries.
- **Colombia and Guatemala** are the next most popular destinations with Colombia being most popular in Germany and Netherlands and Guatemala being most popular with the British.
- **The popularity ranking of Latin American destinations is similar in the three north European markets** (with the exception of Surinam for the Dutch market) with Nicaragua being the 12<sup>th</sup> most popular destination in the Netherlands and the 13<sup>th</sup> Germany and the UK.
- **For the Spanish market** the top 3 Latin American destinations are Brazil, Peru and Colombia, followed by Ecuador and Chile. Nicaragua is the 12<sup>th</sup> most popular destination.

- Research competitor markets to see what they are offering and how they are positioning themselves on quality and type of nature and eco-tourism experience offered and on price. Consider how which market segments you plan to target and how you can differentiate your offer from those in competitor countries. Highlight these differences in your promotional materials.

### Tourism expenditure

Figure 5: European source markets by international expenditure 2012



Source: UNWTO

- **Germans spend the most on international travel**, by a considerable margin. All the European markets studied for this report increased their expenditure in 2012 compared to 2011 with Germany expanding the most, with a 6% increase, followed by the UK with an increased expenditure of 4%.
- **The over 65 year olds** expenditure on travel has increased the most (32%) amongst European travellers. The other age

### Considerations for action

- Although 2012 showed positive result for tourism expenditure, previous years have shown considerable decline. In the UK for example, expenditure decreased by almost 24% from 2008-11. Consumers are still cautious and although they are prepared to spend money on travel you need to highlight the value they will get from their experience with you.
- The backpackers, young professionals and baby boomers have all shown some growth in tourism expenditure, but to

groups who have increased their expenditure, but by only 2%, are the 15-24s and the 45-64s. Whereas expenditure by the 25-44 year olds has decreased by 20%.

capture the biggest spending market, the 65 and overs it would be important to offer nature and eco-tourism with a focus on quality, comfort, health and safety.

For more information on tourism trade statistics and macro-economic indicators in the EU+EFTA market, refer to CBI's 'Tradewatch' for tourism.

## Market Trends

### Social market drivers

- **Responsible tourism is well established and expanding rapidly.** In 2001 'responsible tourism' was virtually unknown. Twelve years later it is a well-recognised strategy for managing sustainable tourism and growing numbers of businesses are using responsible tourism practises.
- **Auditing by tour operators** of both their tours and accommodation suppliers is already happening and likely to become more common.
- **New experiences, authenticity, activities and value for money** are the priorities for German, Dutch, British and Spanish holidaymakers. The 'experience' is taking over from the destination and European holidaymakers want to return home with a 'story to tell', they desire a unique experience.
- **Growth in older demographic groups** eg, the 'empty-nesters' who are increasingly interested in ethical holidays and can afford to pay for good quality eco accommodation and nature experiences.

### Considerations for action

- Operating as a responsible tourism business that minimises the negative impacts of tourism and promotes the positive impacts, will expand opportunities to attract more affluent market segments and supply the growing number of outbound tour operators that are looking for responsible suppliers that operate sustainably.
- Differentiate your business and the experience you offer from your neighbours. People make the difference. Tell your story and that of your community, and lifestyle.
- Decide which demographic of the nature and eco-tourism market you are best suited to target – eg, younger backpackers or professionals, family groups or older wealthier nature tourists with high expectations of quality and comfort.

### Technology market drivers

- **Growth in Internet use** had led to all demographic groups researching some elements of their trip on the Internet.
- **Social media networks** such as Facebook, Instagram, Pinterest and Twitters and consumer review sites, primarily TripAdvisor are overtaking word-of-mouth recommendations.
- **Younger nature and eco-travellers** – particularly backpackers, young professionals and young families are most likely to use social media.
- **Specialist niche markets** within nature tourism such as bird watchers are engage in specialist online forums and communities to find out where icon species can be seen or share experiences and photographs.

### Considerations for action

- Ensure your website is professional with high quality photos and videos and is well optimised, in order be ranked highly in Google searches. This has become increasingly technical, and Google change their search engine optimisation (SEO) criteria regularly. Unless you are very knowledgeable it is best to use a SEO specialist, as this is likely to be your most important form of marketing.
- Actively participate on social media networks such as Facebook and specialist forums, encourage reviews and feedback from your visitors to increase awareness, monitor your reputation, influence decision making of travellers and generate traffic to your website.
- Social media activity is especially valuable if your business is targeting younger age groups or specialist nature lovers, who are high users of technology.

- Encourage your guests to write reviews, share their photos and videos and make them ambassadors for your business.

For more information on market trends on the EU + EFTA tourism market in general, refer to the CBI's 'Trend Mapping' for Tourism.

## Market Channels and Segments

The British, Dutch, German and Spanish source markets are highly competitive. Direct sales with local suppliers are increasing via the Internet especially for ecotourism products. However the traditional distribution channels via tour operators and intermediary companies still hold a strong position for volume sales. For further information and an illustration of the range of distribution channels in these markets visit the [CBI Tourism Channels and Segments](#) website page.

- **Niche tour operators, rather than the large mass-market tour operators**, mostly sell nature and eco-tourism holidays to Latin America from the European markets. It is a highly competitive market with both buyers and consumers having a wide range of suppliers from worldwide destinations to choose from.
- **Niche tour operators need reliable local partners**. The four European markets looked at in this study all have niche tour operators that specialise in nature and eco-tours to Latin America and who mostly offer tailor-made tours (FIT) to their clients. They need reliable inbound tour operators, or Destination Management Companies (DMCs) to deliver tours for them that are different and stand out from those offered by their competitors.
- **Family groups and older visitors** prefer security of a tour operator but also want individual experiences so tailor made tours are popular.
- **Single travellers** who do not want to travel alone chose small group nature tours.

### Considerations for action

- Identify the niche tour operators in your target markets that offer nature and eco-tourism tours to Latin America.
- Join relevant trade associations in your target markets.
- Attend trade fairs that match your product, or combine your marketing activities with other local businesses to share costs and jointly promote all there is to do in your area.
- Read the travel press and consumer travel supplements in your target market (mostly available online) to find out the types of stories they run.
- If your product is suitable for families or older visitors, target niche operators that specialise in these clients.
- If you can accommodate single travellers then make your offer clear to tour operators so they can promote it.

Trade associations, trade fairs and databases can be good sources for finding specialised nature and eco-tourism tour operators. Examples of such sources are:

#### Trade Associations

- British Travel Association (ABTA) <http://abta.com/go-travel/before-you-travel/find-a-member>
- The British Association of Independent Tour Operators (AITO) [www.aito.com](http://www.aito.com) has a search facility to find specialist tour operators.
- Dutch Association of Travel Agents and Tour Operators (ANVR) [www.anvr.nl](http://www.anvr.nl)
- German Travel Association (DRV) [www.deutschertourismusverband.de/themen/touristische-studien](http://www.deutschertourismusverband.de/themen/touristische-studien) has reports on the German travel and tourism market including adventure travel
- Spanish National Travel Agents Association (AEDAVE) [www.aedave.es](http://www.aedave.es)
- Spanish Centre for Responsible Tourism [www.rutspangea.com](http://www.rutspangea.com)

#### Trade and Consumer Shows and Awards

- Ecotourism and Sustainable Tourism Conference, Bonito, Brazil April 27-30, 2014 [www.ecotourismconference.org](http://www.ecotourismconference.org) Annual conference providing practical solutions to advance sustainability goals for the tourism industry. 450+ exhibitors.

- Fiets en Wandelbeurs [www.fietsenwandelbeurs.nl](http://www.fietsenwandelbeurs.nl) cycling and walking trade fair, held annually in February in Amsterdam
- ITB Berlin – [www.itb-berlin.de](http://www.itb-berlin.de) largest tourism trade fair in the EU market held annually in March
- FITUR [http://www.ifema.es/fitur\\_06](http://www.ifema.es/fitur_06) one of Europe's top three trade and consumer exhibitions, held annually in January in Madrid, Spain
- The Telegraph Adventure Travel Show: 25-26 January 2014 London [www.adventureshow.com](http://www.adventureshow.com)
- Tour Nature [www.tournatur.com](http://www.tournatur.com) walking and trekking trade fair held annually in September in Dusseldorf
- Vakantiebeurs [www.vakantiebeurs.nl](http://www.vakantiebeurs.nl) the main Dutch consumer tourism trade fair held annually in January in Utrecht
- World Responsible Tourism Awards 2014 [www.responsibletravel.com/awards](http://www.responsibletravel.com/awards) Now in their 11<sup>th</sup> year, the newly renamed World Responsible Tourism Awards are the largest responsible tourism awards in the world, and since their inception in 2004, have attracted over 12,000 nominations from the public (individuals, organisations and destinations) leading to 201 organisations Awarded from 51 countries. Annual awards announced on World Responsible Tourism Day at WTM in November; nominations by mid June.
- World Travel Market (WTM) [www.wtmlondon.com](http://www.wtmlondon.com) the world's largest travel market, held annually in November in London.

#### *Internet Research*

You can look for specialised tour operators by using search engines such as Google. To narrow your searches use the domain for each country. Search domains and examples of keywords:

- *Germany:* [www.google.de](http://www.google.de) Keywords: Ökotourismus Reiseveranstalter (ecotourism tour operators) Ökotourismus Reiseunternehmen (ecotourism travel companies), Naturtourismus Urlaub (nature holidays), Erlebnis reisen ('experience' holidays)
- *Netherlands:* [www.google.nl](http://www.google.nl) Keywords: ecotoerisme touroperators (ecotourism tour operators) ecotoerisme vakanties (ecotourism holidays) natuurtoerisme vakanties (nature tourism holidays)
- *UK:* [www.google.uk](http://www.google.uk) Keywords: ecotourism tour operators, ecotourism holidays, nature holidays
- *Spain:* [www.google.es](http://www.google.es) Keywords: tour operadores de ecoturismo (ecotourism tour operators), las empresas de viajes de ecoturismo (ecotourism travel companies) vacaciones de ecoturismo (ecotourism holidays), vacaciones de turismo de naturaleza (nature tourism holidays)

#### *Publications - Magazines:*

- National Geographic <http://adventure.nationalgeographic.com/adventure/>
- National Geographic Traveler [www.natgeotraveller.co.uk](http://www.natgeotraveller.co.uk) (UK)
- Conde Nast Traveller [www.cntraveller.com](http://www.cntraveller.com)
- Geo [www.geo.fr](http://www.geo.fr)
- Lonely Planet Magazine [www.lonelyplanet.com/magazine](http://www.lonelyplanet.com/magazine)
- Sidetracked Adventure Travel Magazine [www.sidetracked.co.uk](http://www.sidetracked.co.uk)
- Travel + Leisure [www.travelandleisure.com](http://www.travelandleisure.com)
- Wanderlust [www.wanderlust.co.uk](http://www.wanderlust.co.uk)

#### *Publications - Newspaper Travel Supplements:*

- Frankfurter Allgemeine Zeitung (FAZ) (Germany) [www.faz.net](http://www.faz.net)
- Telegraph Travel Section (UK) [www.telegraph.co.uk/travel/](http://www.telegraph.co.uk/travel/)
- The Guardian travel section <http://www.theguardian.com/travel>
- Sunday Times travel <http://www.thesundaytimes.co.uk/sto/travel/>

#### *Ecotourism Resource Websites and Social Networking*

- Eco Tourism Blog [www.ecotourismblog.com](http://www.ecotourismblog.com) Site for environment friendly tourists
- Ecotourismize [www.ecotourismize.com](http://www.ecotourismize.com)
- Greenloons [www.greenloons.com](http://www.greenloons.com) Ecotourism travel resource featuring destination profiles, environmentally friendly travel tips, certification information and trip reviews.
- Your Travel Choice [www.yourtravelchoice.org](http://www.yourtravelchoice.org) The resource website of the International Ecotourism Society (TIES) providing an interactive online communication platform.

- **Experienced travellers are increasing comfortable booking their travel arrangements direct** with local suppliers. In 2011 online travel sales increased by 18%.
- **Younger travellers** are most likely to book direct with local suppliers. They will expect quick responses to their enquiries. Backpackers tend to book locally.

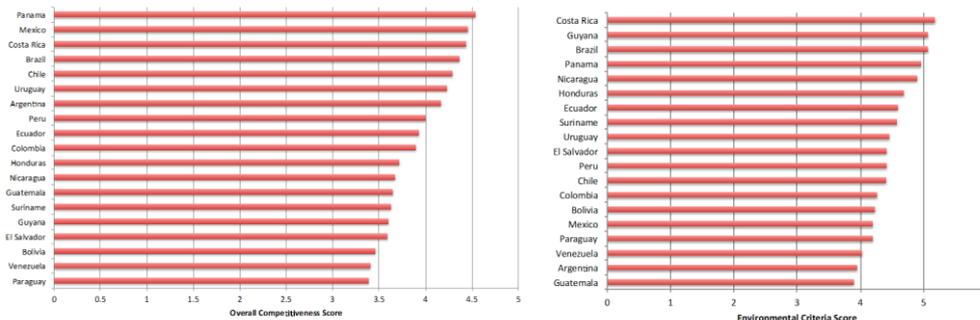
**Considerations for action**

- Ensure your business can be found on the internet and that your website makes it clearly how to contact you by email and phone or offer online booking.
- Be available and answer any queries or booking enquires quickly.
- Your website will need to be professional, well optimised, display excellent photos, visitor reviews and if you offer adventurous nature or wildlife activities include your safety policies.
- Feature your key activities and stories about who you are and why you are different from other nature or eco-tourism accommodation or activity provider.
- Network and recommend other local businesses, it will keep your visitors in the area for longer and other businesses may do the same for you.
- Participate in social media conversations to find out what nature and eco-tourism travellers are interested in.

For more information on market channels and segments on the EU+EFTA tourism market in general, refer to CBI’s ‘Market channels and segments’ for tourism

**Market Competitiveness**

**Figures 6 & 7: Travel & Tourism Competitiveness Index Scores for Latin America**



Source: The Travel and Tourism Competitiveness Report, 2013

- **The Travel & Tourism Competitiveness Index provides insights** into how competitive your country is by assessing how attractive a country’s travel and tourism industry is for investment. It measures 14 pillars including Environmental Sustainability. For tour operators in the British, Dutch, German and Spanish markets it gives them information about which countries would be worth investing in. For local tourism providers it provides insights into their country’s strengths and weaknesses.
- **In Latin America, the top 5 performing destinations** for overall competitiveness in 2013 are Panama, Mexico, Costa Rica, Brazil and Chile.
- **For Environment Sustainability Guyana**

**Considerations for action**

- Understanding how European travellers perceive your country and your business is central to being able to meet their needs and market your businesses successfully in a very competitive market.
- The Travel & Tourism Competitiveness Index is a useful guide to the elements that are important for tourism investment and for a nature and eco-tourism destination. Use it to see where your country is strongest, where it could improve and how your country scores. Emphasise this in your marketing message.

**and Nicaragua scored in the top 5**, whereas Chile and Mexico drop to 12<sup>th</sup> and 15<sup>th</sup> places respectively.

- **International benchmarking is provided by The Adventure Tourism Development Index (ATDI)** which ranks countries based on 10 Pillars of Adventure Tourism Competitiveness. Nature resources are one of these 10 Pillars, highlighting how closely linked nature and adventure tourism are. The 10 Pillars are:
    - Sustainable development policy
    - Safety and security
    - Healthcare
    - Natural resources
    - Cultural resources
    - Adventure activity resources
    - Entrepreneurship
    - Humanitarian
    - Tourism infrastructure
    - Image
  - **Costa Rica, Ecuador with the Galapagos Islands and Brazil** are popular destinations for the European outbound operators offering nature and eco-tourism tours. Understanding competing destinations will enable better market positioning of your product.
- A similar index is available from the Adventure Tourism Development Index (ATDI) [www.adventuretravel.biz](http://www.adventuretravel.biz)
  - Research other nature and eco-tourism destinations that have a similar offer to your own. Find out what they offer, their pricing policy, how they are presented on their own website and on European tour operator websites and brochures.
  - Internet searches of outbound tour operators website will identify the destinations that are currently popular in the nature and eco-tourism market.
  - In particular study tours to Costa Rica, Ecuador, Guatemala and Brazil: for examples of the type of nature and eco-tours they organise, the types of accommodation offered, the market segments they are targeting, pricing.

For more information on market competitiveness on the EU+EFTA tourism market in general, refer to CBI's 'Market competitiveness' for tourism.

### Useful sources

- Center for Responsible Travel (CREST) [www.responsibletravel.org](http://www.responsibletravel.org) Based in Washington DC, CREST employs policy-oriented research to design, monitor, evaluate and improve the social and environmental commitments of responsible tourism, as well as promote sustainable practices and principles within the wider tourism industry.
- Earth Net – <http://earth-net.eu> - European Alliance for Responsible Tourism and Hospitality, aims to promote the concept of responsible tourism in the world. Go to 'What is responsible tourism' and 'Publications & Resources' for an overview of the trends, ethic codes and other information about the responsible tourism market in Europe.
- Global Sustainable Tourism Council [www.gstcouncil.org](http://www.gstcouncil.org) The international body for fostering increased knowledge and understanding sustainable tourism practices, through diverse programmes of international standard setting, education and training, and accreditation.
- The International Ecotourism Society (TIES) [www.ecotourism.org](http://www.ecotourism.org) Founded in 1990, TIES is the world's oldest and largest international ecotourism association, a non-profit organisation dedicated to promoting ecotourism. It has a global network of ecotourism professionals and travellers leading efforts to make tourism a viable tool for conservation, protection of bio-cultural diversity and sustainable community development. The network spans 135 countries and there are 500 member organisations and 1,150 individuals.