

The European market potential for ecotourism

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Ecotourism can be regarded as a specialized area within the category of nature tourism. Its focus is on learning about the environment, minimizing negative impacts and contributing (financially or otherwise) to the long-term protection of a community or natural site. Demand for ecotourism is increasing amongst Europeans. The COVID-19 pandemic has given ecotourism an additional boost.

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1. Product description

Ecotourism is often called 'responsible tourism', 'soft tourism', 'green tourism' or 'sustainable tourism'. The International Ecotourism Society and the Global Ecotourism Network defines ecotourism as 'responsible travel to natural areas that conserves the environment, sustains the well-being of the local people and involves interpretation and education' for all parties involved. With ecotourism, in addition to experiencing and learning about natural ecosystems, tourists contribute financially to the conservation, protection and recovery of nature, whilst supporting the livelihood of the community. Ecotourists thus seek to connect with people and nature, want to learn about ecosystems and have an active desire to contribute to protection and restoration of the ecosystems they visit ([The International Ecotourism Society](#) - TIES, 2019). In short, ecotourism brings together conservation, communities and sustainable travel.

Characteristics

According to the World Tourism Organization, ecotourism has the following characteristics:

1. '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.
2. It contains educational and interpretation features.
3. It is generally, but not exclusively organised by specialised tour operators for small groups. Service provider partners at the destinations tend to be small, locally owned businesses.
4. It minimises negative impacts upon the natural and socio-cultural environment.
5. It supports the maintenance of natural areas which are used as ecotourism attractions by: generating economic benefits for host communities, organisations and authorities managing natural areas with conservation purposes; providing alternative employment and income opportunities for local communities; increasing awareness towards the conservation of natural and cultural assets, both among locals and tourists'. These characteristics are sometimes referred to as principles of ecotourism.

Accommodations

Ecotourists are interested in staying in unique accommodations in attractive natural places, especially if they

are seen as more sustainable and authentic than other types of accommodations. Ecolodges fulfil this demand, and their popularity has been increasing. The box below lists a few best practices of authentic ecolodges.

Best Practices of Ecolodges

- In Africa: [Il Ngwesi Lodge](#), Kenya, the first ecolodge in the world to be 100% owned and managed by an indigenous tribe (Samburu Maasai). [Damaraland Camp](#), Namibia, an exemplary model of community-private sector partnerships.
- In Asia and the Pacific Region: [Coconut Lagon](#), India, one of the best examples in the world in terms of recycling and reusing traditional rural buildings as guest accommodations. [Amity EcoShacks](#), Australia a camping site for which the Amity EcoShacks were designed and planned by an international award-winning team
- In Latin America and the Caribbean Region: [Kapawi Ecolodge](#), Ecuador, South America's first fully community-owned ecolodge is also an exemplary model of partnership between the indigenous community and a private company. [Chalalan Ecolodge](#), Bolivia, owned entirely by an indigenous community. The lodge buildings are designed to resemble the traditional Tacana-style cabins and use eco-friendly materials. Mexico's '[Walls Of Water](#)' is becoming an ecotourism site. It is a former Mexican federal prison located in the the Islas Marías archipelago, in the Mexican Pacific.
- In Middle East and North African Region: [Feynan Ecolodge](#), Jordan, offers one of the most authentic immersive experiences with Bedouins of all lodges in the Middle East. [Kasbah Du Toubkal](#), Morocco, an extreme makeover—from a the ruins of a traditional baron's palace to a 49-guest lodge.

Niche markets

Specialist niches include agritourism, rural tourism, food tourism, wildlife tourism, bird watching, dark-sky tourism and camping. The products and services in this segment come in many forms, including gastronomy, culture, architecture, wilderness, stargazing and wild camping. As a niche market within nature tourism, ecotourism could include nature tours, [visits to volcanos](#); fishing; [cycling](#); [bird watching](#); kayaking, bush walking, hiking and gastronomy, as long as there is an educational component and a financial (or other) contribution to protecting nature and supporting the local community.

The main attractions in the ecotourism market are naturalness, wildlife, cultural heritage, landscape and community, all of which can be linked to a unique natural landscape. Examples include marine or national parks and other parks with protected status, rich biodiversity, local culture and traditional protectors of natural environments. As noted by De Bock, tourists are interested in the whole ecosystem; not only wildlife or nature, but also the connections with culture and people. The boxes below present two examples of how ecotourism can address niche markets.

Ecotourism case study: Wildlife watching

Rwanda is one example of how ecotourism can be developed successfully based on nature. Over the past 27 years, Rwanda has capitalized on its unique natural biodiversity and landscape, creating a growing ecotourism industry. Tourists are drawn to Rwanda to go hiking in one of the national parks or visit the bamboo forests where they can encounter mountain gorillas in their natural habitat. Mountain gorillas are an endangered species, and ecotourism has been developed to protect them. Furthermore, ecotourism has been bringing more employment and income to communities, thus helping to alleviate poverty. Offering these unique tourism products in an attractive natural environment and including local communities has made Rwanda one of the fastest-growing ecotourism destinations in the world (UNCTAD).

Ecotourism case study: Gastronomy

The Tokat region in Turkey is a good example of how to develop ecotourism in combination with gastronomy. The region has a rich cultural heritage and rich biodiversity. The rich culture is expressed through a wide array of tastes in gastronomy. There are many varieties of cereals, vegetables and fruit crops, which are used to produce memorable gastronomic creations, including the famous Tokat Kebab. This is enhanced by numerous local and original flavours, such as grape leaves, molasses, walnuts and fenugreek. Tourists can also visit Tokat

Castle to learn more about the region's history. (Mayor Eroğlu, the International Ecotourism Society, 2021).

2. What makes Europe an interesting market for ecotourism?

According to [The International Ecotourism Society](#), the annual global revenue from ecotourism is estimated at between USD 800 billion and USD 1 trillion. Worldwide, the industry employs more than 11 million people directly, and even more indirectly. Eco-travellers cost less in infrastructure per unit of revenue than any other type of traveller. It provides the strongest community revenue and the strongest return on investment. Focusing on ecotourism [benefits the biodiversity](#) in your destination in four ways: it offers a source of financing; it is a justification for conservation; it provides local people with economic alternatives; and it builds constituency.

Based on a greater demand for sustainable travel, growing interest in nature and culture, and an increasing market share, ecotourism is an interesting sub-sector to develop in order to attract European tourists.

In recent years, the demand for ecotourism has been growing rapidly. The ecotourism sector is considered the fastest-growing segment within the global tourism industry. Since the early 1990s, the segment has been growing by 20%–34% per year, whilst the overall tourism industry has been growing by only 4.3% per year. The demand for ecotourism is high and will continue to grow. For several years, tourists have become more aware of the need to leave a positive impact on the destinations that they visit. In a 2018 Booking.com survey, [87% of all global travellers reported wanting to travel sustainably](#).

The COVID-19 pandemic has allowed people to rethink their relationships with the ecosystem, and even more Western tourists have discovered nature, wildlife watching and birding as leisure activities. In 2021, [Booking.com](#) stated that the pandemic has boosted the demand for sustainable travel: [61% of all travellers reported wanting to travel more sustainably in the future](#), and 49% noted that the pandemic had shifted their attitude towards making positive changes in their day-to-day lives. 59% were even willing to boycott businesses if they fail to prioritize the environment within 12 months! As a result, tourism entrepreneurs have observed a growing demand for guided wildlife, bear-watching and birdwatching tours, especially amongst tourists from North-western Europe.

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

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

Euronews even suggests that there is an [ecotravel boom in Europe](#). This trend is underscored by Eurostat, which stated in 2021 that most EU citizens (82%) were prepared to change their behaviour in order to travel more sustainably. Eurostat also reported that 28% of all EU respondents indicated the need for 'More attention to the impact of tourism on local communities'. The European Union Flash Barometer (conducted in October 2021) also strongly suggests a high level of interest in sustainability amongst Europeans. According to that study, around half of all Europeans reported wanting to consume locally sourced products (55%), reduce waste (48%) and reduce water usage (35%) whilst on holiday.

Sustainable transportation has also become more popular, with about one third of all Europeans choosing transport options based on ecological impact at the destination. About one third of all Europeans were willing to contribute financially to protecting nature and supporting local communities at the destination. Only 15% of all Europeans were not willing to change their habits (Flash Eurobarometer 499, October 2021).

Tourism New South Wales considers [ecotourists the early adopters of personal values](#), which many other market segments with potentially larger visitor numbers will follow. The growing interest in sustainability and willingness to contribute financially thus creates an opportunity for developing ecotourism for a larger group of European tourists.

Ecotourists are generally willing to pay more for experiences, at least if they are authentic and meaningful (Center for Responsible Travel). Higher revenues make it possible to hire more qualified staff and offer better travel experiences ([Euronews](#), 2018). At the same time, however, [42% of all tourists identify cost as an obstacle to travelling more sustainably](#), according to the Center for Responsible Travel.

Given that a relatively high share of Europeans are willing to pay more for sustainable practices (according to the European Union Flash Barometer of October 2021), it is important to communicate to guests what your company contributes to the destination with regard to nature protection, local jobs, the use of local food, waste reduction, water-usage reduction and sustainable forms of transportation, as well as other ways in which you are contributing to sustainability. Because ecotourists are interested in learning about nature and culture at the destination, these aspects are likely to enhance satisfaction.

Tips:

Apply the guiding [principles of the International Ecotourism Society](#) by using them as benchmarks to set up tourism activities involving nature and the local community, including—but not limited to—luxury, adventure, rural, culinary and educational activities.

Develop a vision on and mission for ecotourism. The online platform [Tourism4SDGs](#), which refers to the application of the [Global Sustainability Goals](#), could be a source of inspiration for you.

Develop trust with your customers. Trust can be built by offering flexibility in your cancellation policy, making it easy to change a booking, by cooperating with a European tour operator, obtaining certification from a well-known certification organisation, by responding quickly to requests by email or through the website, and by asking satisfied guests to leave a review. For example, you could ask your current (satisfied) guests to leave a review on such websites as [Tripadvisor](#) and [Booking.com](#). In addition, be sure to offer only what you can deliver, and do not be afraid to say ‘no’ if you are not able to provide a certain service.

Know where and how to target ecotourists online. Ecotourists generally know what they want, and they are quite independent. They will often plan and book their own trips and arrange for their own travel needs and experiences. As a provider of accommodations or local activities, you should therefore be sure to have good online presence targeting this group and matching their needs. On the other hand, you should invest your energy carefully. It is important to keep evaluating your online presence and who you are reaching with your online marketing. Consider which social media platform is used by your main target group. Instagram might be useful for your company.

If you are a small, locally owned business, it would be wise to invest in building a sustainable ecotourism network. Cooperation is needed in order to develop a sustainable ecotourism product with more exposure.

Market segments in ecotourism with the most opportunities

Just as there are many different types of ecotourism businesses, ecotourism appeals to a wide range of travellers of all ages and interests who consider nature as a primary motivation for travel. European ecotourists are generally well-educated (particularly concerning the environment) and well-travelled. They can be divided into two major groups based on age: senior travellers and younger travellers. Younger ecotourists employ

technology as part of their experiences, and they use it during the three key stages of the customer journey: pre-trip planning, communicating during the trip and post-trip evaluation.

Table 1: Profile of two main categories of European ecotourists

Younger ecotourists (18-44 years of age)	
Second-largest segment Most have travelled a lot and worked or studied abroad Increasingly interested in exploring new and faraway destinations	
Subgroup 1: High income, little time	Subgroup 2: Smaller daily budget, extensive time
Most between 31 and 44 years of age Young professionals with high incomes but not much time to travel (up to 3 weeks) Often travel in couples Looking for unusual 'once-in-a-lifetime' experiences (e.g. scuba diving, jungle trekking) Want to fit as much as possible into their holidays Prefer comfort and high-quality services	Most between 18 and 30 years of age Mostly backpackers and gap-year travellers Small daily budgets, whilst travelling over extended periods of time (usually between a month and a year) Prefer less expensive accommodation and inexpensive, yet authentic activities Want to engage with local communities and experience local activities and products Want to give back to the local community Often combine their travels with volunteering activities in community of conservation projects 71% of people under 30 identify sustainable travel as a priority

Families with children (25–45 years of age)	
European families with children form a relatively small segment for ecotourism in developing countries. Families with teenagers are interested in ecotourism (e.g. birdwatching and wildlife tours with a local guide). However, several factors make ecotourism trips to developing countries less attractive for families with children. First, ecotourism tours (e.g. safaris) are relatively expensive for families. Second, ecotourism and wildlife tours are often more difficult to fit into a general holiday outside Europe. For example, compared to Europe, distances are larger and the quality of roads is lower (De Bock, personal communication, April 2022)	
Senior ecotourists (50–70 years of age)	
<p>Largest segment</p> <p>Children are grown and no longer live with them.</p> <p>Experienced travellers who enjoy spending time in natural, quiet environments and looking for new experiences</p> <p>Seek high-quality tourism for a high price; willing to pay more for authentic experiences</p> <p>Generally seek higher standards of comfort than younger people</p>	

Sources: Interview with Debora de Bock (Better Places) and [Yee, 2018](#)

3. Which European countries offer the most opportunities for ecotourism?

Germany, the Netherlands, France, Spain, Sweden and Belgium have the biggest share of outbound trips with nature as the primary motive. These six countries are considered the most relevant ecotourism markets in Europe, with Germany standing out as the leader (see Table 2). As confirmed by De Bock, a travel expert for Better Places, most of the interest in ecotourism comes from these countries. Tourists from the United States and United Kingdom are also interested in ecotourism (personal communication, April 2022). Other interesting countries for ecotourism include Italy, Poland and Austria, with about 2 to 3 million outbound overnight trips motivated by the desire to experience nature at the holiday destination (Flash Eurobarometer, 2021 and Statista, 2019).

Table 2: Top European markets for nature tourism and ecotourism

	Outbound overnight trips 2019, in millions	Percentage of holiday travellers listing nature as a primary motive for choosing a holiday destination	Indication of the number of outbound overnight trips with nature as a primary motive, in millions
Germany	99.5	18%	17.91
Netherlands	22.0	29%	6.38
France	29.6	17%	5.03
Spain	17,1	23%	3.93
Sweden	17,9	20%	3.58
Belgium	14.2	21%	2.98

Sources: Statista, 2019; [Flash Eurobarometer](#) 499, 2021

It is important to note that these statistics show a preference for nature itself, and not ecotourism. Preferences for nature tourism are included in our study on [nature tourism](#).

Germany

A proportion of 18% of German travellers identify nature as their primary reason for visiting a destination. They are apparently so impressed by the natural features of their destinations that 25% mention it as a reason to return to the destination.

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

Table 3: German key attitudes towards tourism

Motivation:	<ul style="list-style-type: none"> • Nature as primary reason: 18% • Nature as secondary reason: 31% • Nature as primary or secondary reason: 48%
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Most popular type of accommodations:	<ul style="list-style-type: none"> • If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (54%) • If 4–13 nights: paid commercial accommodation (47%)
Most frequent type of holiday:	<ul style="list-style-type: none"> • If >13 nights: Tourist services purchased separately (44%) • If 4–13 nights: Tourist services purchased separately (44%)
Most popular destination regions with developing countries:	<ul style="list-style-type: none"> • Asia and Oceania (5%) • North Africa and Middle East (3%) • Caribbean, Central and South America (2%)
Most popular booking method:	<ul style="list-style-type: none"> • Online commercial services, such as tour operators and airline companies (28%) • Through an acquaintance (26%) • Over-the-counter at a travel agency (27%) • Online commercial services listing private housing owned by individuals (23%)
Most important reasons to return to the destination (primary and secondary reason combined):	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (44%) • Quality of accommodations (33%) • Cultural and historical attractions (13%)
Most important primary reasons to return to the destination:	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (25%) • Quality of accommodations (18%) • Cultural and historical attractions (13%)
Most important sources of information for decision-making:	<ul style="list-style-type: none"> • Recommendations from friends, colleagues and relatives (44%) • Personal experience (39%)
Region of residence:	<ul style="list-style-type: none"> • Rural area or village (41%) • Small or middle-sized town (40%) • Large town (18%)

Source: [EU Flash Barometer 432](#), [EU Flash Barometer 499](#)

The Netherlands

One quarter of all Dutch travellers identify nature as the primary reason for visiting a destination (29%). Twice as many (53%) refer to nature as the main reason to return. Most Dutch travellers prefer to purchase services and compose long (>13 days) holidays themselves (61%). They book most of their holidays (44%) online through commercial services, such as tour operators and airline companies (44%). The most preferred accommodations for Dutch travellers on long holidays are paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (55%). The decision-making process is informed mainly by recommendations from friends, colleagues and relatives (47%).

Table 4: Dutch key attitudes towards tourism

Motivation:	<ul style="list-style-type: none"> • Nature as primary reason: 29% • Nature as secondary reason: 26% • Nature as primary or secondary reason: 54%
Most popular type of accommodations:	<ul style="list-style-type: none"> • If >13 nights paid commercial accommodations, such as hotels, B&B, cruises, youth hostels (37%) or camping facilities, such as in a tent, motorhome, caravan or holiday village (34%) • If 4–13 nights: paid commercial accommodations (53%)
Most frequent type of holiday:	<ul style="list-style-type: none"> • If >13 nights: package travel, excl. all-inclusive packages (61%) • If 4–13 nights: package travel, excl. all-inclusive packages (58%)
Most popular destination regions with developing countries:	<ul style="list-style-type: none"> • Asia and Oceania (5%) • Caribbean, Central and South America (4%) • North Africa and Middle East (3%)
Most popular booking method:	<ul style="list-style-type: none"> • Online commercial services, such as tour operators and airline companies (44%) • Online commercial services listing private housing owned by individuals (27%)
Most important reasons to return to the destination (primary and secondary reason combined):	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (53%) • Quality of accommodations (32%) • Cultural and historical attractions (31%)

Most important primary reasons to return to the destination:	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (34%) • Quality of accommodations (14%) • Cultural and historical attractions (11%)
Most important sources of information for decision-making:	<ul style="list-style-type: none"> • Recommendations from friends, colleagues and relatives (47%) • Websites collecting and presenting comments, reviews and ratings from travellers (46%) • Personal experience (29%) • Websites run by service providers or destinations (26%)
Region of residence:	<ul style="list-style-type: none"> • Rural area or village (43%) • Small or middle-sized town (34%) • Large town (23%)

Source: [EU Barometer 432](#), [EU Barometer 499](#)

France

Of the top six European countries, France has the fewest travellers who identify nature as a primary motive for visiting a destination, with a proportion of 17%. Nevertheless, natural features stand out as the primary reason to return (36%). Regardless of duration, package holidays (excluding all-inclusive packages) are the preferred holiday format (45%–46%). It is therefore not surprising that French travellers purchase most of their holidays online, either through providers, such as tour operators or airline companies (33%), or through private housing (25%). The French prefer to spend their holidays with friends or relatives (long holidays 27%, short holidays 35%) or in paid accommodations, such as hotels, B&B, cruises or youth hostels. Friends, colleagues and relatives are the most important sources of information when French travellers are planning their holidays (57%).

Table 5: French key attitudes towards tourism

Motivation:	<ul style="list-style-type: none"> • Nature as primary reason: 17% • Nature as secondary reason: 20% • Nature as primary or secondary reason: 48%
Most popular type of accommodations:	<ul style="list-style-type: none"> • If >13 nights: staying with friends or relatives (27%) and paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (26%) • If 4–13 nights: staying with friends or relatives (35%) and in paid commercial accommodations, such as hotels, B&B, cruises or youth hostels (30%)

Most frequent type of holiday:	<ul style="list-style-type: none"> • If >13 nights: package travel, excl. all-inclusive packages (46%) • If 4–13 nights: package travel excl. all-inclusive packages (45%)
Most popular destination regions with developing countries:	<ul style="list-style-type: none"> • North Africa and Middle East (6%) • Asia and Oceania (4%) • Caribbean, Central and South America (3%)
Most popular booking method:	<ul style="list-style-type: none"> • Online commercial services, such as tour operators and airline companies (33%) • Online commercial services listing private housing owned by individuals (25%)
Most important reasons to return to the destination (primary and secondary reason combined):	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (58%) • Cultural and historical attractions (36%) • Quality of accommodations (32%) •
Most important primary reasons to return to the destination:	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (36%) • Cultural and historical attractions (14%) • Quality of accommodations (13%)
Most important sources of information for decision-making:	<ul style="list-style-type: none"> • Recommendations from friends, colleagues and relatives (57%) • Websites collecting and presenting comments, reviews and ratings from travellers (40%) • Personal experience (37%)
Region of residence:	<ul style="list-style-type: none"> • Rural area or village (35%) • Small or middle-sized town (47%) • Large town (18%)

Source: [EU Barometer 432](#), [EU Barometer 499](#)

Spain

Nature is an important reason determining where Spanish travellers decide to go on holiday. The natural features of a destination are also an important reason for returning to a destination. Spanish travellers prefer paid commercial accommodations over other types of lodging. In addition, they do not tend to buy complete holiday packages, but prefer to purchase different products from different companies. Outside Europe, Spanish-speaking destinations (e.g. the Caribbean, Central and South America) are relatively popular holiday destinations for Spanish travellers, as compared to those from other European countries. About one quarter of

all Spanish travellers still prefer to book holidays at the counter of travel agencies. Like other Europeans, tourists from Spain regard recommendations from friends and relatives as very important when deciding where to go on holiday.

Table 6: Spanish key attitudes towards tourism

Motivation:	<ul style="list-style-type: none"> • Nature as primary reason (23%) • Nature as secondary reason (27%) • Nature as primary or secondary reason (49%)
Most popular type of accommodations:	<ul style="list-style-type: none"> • If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (34%) • If 4-13 nights: paid commercial accommodations (51%)
Most frequent type of holiday:	<ul style="list-style-type: none"> • If >13 nights: Tourist services purchased separately (39%) • If 4-13 nights: Tourist services purchased separately (41%)
Most popular destination regions with developing countries:	<ul style="list-style-type: none"> • Asia and Oceania (2%) • North Africa and Middle East (2%) • Caribbean, Central and South America (4%)
Most popular booking method:	<ul style="list-style-type: none"> • Online commercial services, such as tour operators and airline companies (31%) • Online commercial services listing private housing owned by individuals (24%) • Over the counter at travel agency (23%)
Most important reasons to return to the destination (primary and secondary reason combined):	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (40%) • Quality of accommodations (37%) • Cultural and historical attractions (29%) • General level of prices (25%)
Most important primary reasons to return to the destination:	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (23%) • Quality of accommodations (19%) • Cultural and historical attractions (14%)

Most important sources of information for decision-making:	<ul style="list-style-type: none"> • Recommendations from friends, colleagues and relatives (56%) • Websites collecting and presenting comments, reviews and ratings from travellers (37%) • Personal experience (26%) • Over the counter at travel agencies (17%)
Region of residence:	<ul style="list-style-type: none"> • Rural area or village (36%) • Small or middle-sized town (37%) • Large town (26%)

Source: [EU Barometer 432 Volume A](#), [EU Barometer 499](#)

Sweden

Swedish travellers are somewhat less concerned about prices than Spanish travellers are, but a bit more than those from the Netherlands and Germany. Nature is quite an important aspect of holiday destinations. Swedish travellers are more interested in visiting Asia and Oceania than are their counterparts from the other top six European countries.

Table 7: Swedish key attitudes towards tourism

Motivation:	<ul style="list-style-type: none"> • Nature as primary reason: 20% • Nature as secondary reason: 32% • Nature as primary or secondary reason: 52%
Most popular type of accommodations:	<ul style="list-style-type: none"> • If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises, youth hostels 43% • If 4–13 nights: paid commercial accommodations: 48%
Most frequent type of holiday:	<ul style="list-style-type: none"> • If >13 nights: Tourist services purchased separately: 50% • If 4–13 nights: Tourist services purchased separately: 52%
Most popular destination regions with developing countries:	<ul style="list-style-type: none"> • Asia and Oceania (9%) • North Africa and Middle East (2%) • Caribbean, Central and South America (2%)

Most popular booking method:	<ul style="list-style-type: none"> • Online commercial services such as tour operators, air companies, etc (47%) • Online commercial services listing private housing of individuals (16%) • Over the counter at travel agency (11%)
Most important reasons to return to the destination (primary and secondary reason combined):	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (39%) • Cultural and historical attractions (38%) • Quality of accommodations (24%) • General level of prices (18%)
Most important primary reasons to return to the destination:	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (19%) • Cultural and historical attractions (16%) • Quality of accommodations (11%)
Most important sources of information for decision-making:	<ul style="list-style-type: none"> • Recommendations from friends, colleagues and relatives (53%) • Personal experience (36%) • Websites collecting and presenting comments, reviews and ratings from travellers (35%) • Websites run by service providers or destinations (19%)
Region of residence:	<ul style="list-style-type: none"> • Rural area or village (21%) • Small or middle-sized town (46%) • Large town (33%)

Source: [EU Barometer 432 Volume A](#), [EU Barometer 499](#)

Belgium

One out of five (21%) Belgian travellers see nature as the primary reason for visiting a destination, whilst a higher percentage (51%) mention it as the main reason to return. If they go on a long holiday (>13 nights), they prefer to purchase package deals (excl. all-inclusive packages) or to compose their own packages, staying in commercially run accommodations (38% each). They preferably book these holidays through online commercial services, such as tour operators and airline companies, but not through private housing owned by individuals (38%). For these holidays, commercial accommodations, such as hotels, B&B, cruises and youth hostels are the most popular type of accommodations (55%). When preparing their holidays, Belgians most often rely on recommendations from friends, colleagues and relatives (51%).

Table 8: Belgian key attitudes towards tourism

Motivation:	<ul style="list-style-type: none"> • Nature as primary reason: 21% • Nature as secondary reason: 21% • Nature as primary or secondary reason: 41%
Most popular type of accommodations:	<ul style="list-style-type: none"> • If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (40%) • If 4–13 nights: paid commercial accommodations (55%)
Most frequent type of holiday:	<ul style="list-style-type: none"> • If >13 nights: package travel, excl. all-inclusive packages (38%) and tourist services purchased separately (38%) • If 4–13 nights: package travel, excl. all-inclusive packages (40%)
Most popular destination regions with developing countries:	<ul style="list-style-type: none"> • Asia and Oceania (5%) • North Africa and Middle East (5%) • Caribbean, Central and South America (3%)
Most popular booking method:	<ul style="list-style-type: none"> • Online commercial services, such as tour operators and airline companies (38%) • Online commercial services, excl. private housing owned by individuals (28%) • Through an acquaintance (28%)
Most important reasons to return to the destination (primary and secondary reason combined):	<ul style="list-style-type: none"> • Natural features (51%) • Quality of accommodations (43%) • Cultural and historical attractions (34%) • General level of prices (34%)
Most important primary reasons to return to the destination:	<ul style="list-style-type: none"> • Natural features, such as landscape and weather conditions (25%) • Quality of accommodations (17%) • Cultural and historical attractions (15%)
Most important sources of information for decision-making:	<ul style="list-style-type: none"> • Recommendations from friends, colleagues and relatives (51%) • Websites collecting and presenting comments, reviews and ratings from travellers (38%) • Personal experience (38%)

Region of residence:	<ul style="list-style-type: none"> • Rural area or village (45%) • Small or middle-sized town (38%) • Large town (16%)
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Source: [EU Barometer 432](#), [EU Barometer 499](#)

4. Which trends offer opportunities or pose threats on the European ecotourism market?

This section highlights three trends in market demand: sustainable travel, health and wellness activities, do-good/feel-good holidays, flexibility, gender equality and environmentally friendly transport.

Demand for sustainable travel

Ecotourists are sustainable travellers. Tourists are becoming increasingly concerned about the environment and its ecosystems. These concerns include the protection of plants and animals, environmental and cultural impact, and a desire to have a positive impact on local communities. These tourists are more likely to choose low-impact, sustainable travel options. They want to reduce the carbon footprint of their holidays, whilst also improving the destination. For this reason, do-good/feel-good holidays and ecological tours are growing in popularity.

Most European tourists expect businesses to become sustainable, and they prefer to use the services of companies that follow green or eco-friendly practices. In addition, businesses in the lodging sector are taking the lead in the implementation of energy management systems that yield high-impact cost savings through conservation. Travellers are also becoming increasingly aware of human rights and working conditions. They are therefore demanding forms of responsible tourism that protect people and benefit communities.

Ecotourists are also increasingly demanding greener food options. In response, hotels are expanding their programmes for sustainable food sourcing and the reduction of food waste. According to the World Food Travel Association, however, food providers do not always achieve sustainability by meeting the demands of tourists for local and authentic offerings. For more information on how to seize opportunities relating to this trend, also read [our study on food tourism](#).

Best practices in sustainable travel:

- [La Choza Chula](#), in Guatemala, operates turtle and mangrove tours, cooking classes and home-stay, cultural immersion and volunteer programmes. They also offer weekly English classes for their guides, in addition to funding the construction of a library, setting up a mobile library and building a computer lab and a secondary school.
- [Volcanoes Safaris](#) in Uganda and Rwanda is an excellent example of how ecotourism can be developed. The company offers travellers a luxurious and comfortable stay close to the Volcanoes National Park and the natural habitat of mountain gorillas. The company aims to make a positive impact on the mountain gorillas and their surroundings. It goes much further than that, however, contributing to reforestation projects and other local and regional foundations, encouraging the involvement of the local community and operating in an eco-friendly manner. Tourists can choose from a variety of safaris and excursions that focus on wildlife, authenticity and local culture.
- [Global Himalayan Expedition](#), India

Demand for health and wellness activities

Demand continues to grow for health and wellness travel experiences that enrich both the mind and the body continues. In addition, the COVID-19 pandemic generated more attention to health and safety, and about half of all European residents consider this important when on holiday. The pandemic also has led to more focus on

health and healthy lifestyles. Ageing tourists, the typical lifestyles of Generations Y (between 26 and 41 years of age in 2022) and Z (between 18 and 25 years of age in 2022), the growing middle class and the technological and digital revolution are all enhancing the importance of the health trend.

Wellness tourism in Europe is soaring. Although this is not the primary travel motive for ecotourists, they do expect a wide range of facilities for being physically active and engaging in mentally restorative activities during their travels.

Examples include:

- Activities in nature in combination with wellness (e.g. hiking for meditation, yoga and tai chi);
- Thematic health hotels in nature;
- Personalized health and wellness programmes;
- Rejuvenation and psychological well-being;
- Meditation and yoga;
- Healthy menus and cooking classes;
- Mobile health monitoring;
- Holistic holidays;
- Wellness trips and retreats built around specific wellness activities, ranging from bootcamps to meditation and silence retreats in a natural environment;
- Spiritual travel with an adventure component.

In addition, an increasing proportion of ecotourists seek to travel specifically for therapeutic purposes. More and more companies are responding to this trend by offering innovative programmes designed to limit traveller stress and maximize health and wellness benefits. For more information on how to seize opportunities relating to this trend, also read our study on [wellness tourism](#).

Active ecotourism: Doing good and feeling good through travel

[Amadeus](#) identifies six top travel trends for 2022. One of these trends is 'Active Ecotourism: The time for just talk is over'. Today's travellers are more interested in taking action, with a growing demand for trips that support diverse global communities.

One example of a successful activity can be found on the Wadden island of Terschelling in the Netherlands. Tourists are paying to participate in a local activity known as *jutten*. During this activity, they clean up the beach by collecting all kinds of items from waste to re-useable items. Local islanders have been doing this for centuries, with the main aim of collecting treasures and other valuable items from the beach that can be either re-used or recycled. Tourists feel good about this activity, as it is part of local culture and it allows them to help keep the beaches clean. For these reasons, the '[environmental jutting](#)' activity is very popular with tourists.

Planting trees or rice provide another example of activities that tourists like to do as part of contributing to the restoration of natural habitats in the destinations they visit. The box below presents several best practices.

Best practices in active ecotourism:

- [Bukit Lawang in North Sumatra](#): Conservation of natural and cultural heritage and biodiversity
- [Kura Hulanda](#): Participation involving the local community in planning and development, Curaçao
- [Ndumo Wilderness Camp](#): Poverty alleviation, Kwazulu-Natal, South Africa
- [East Africa Community Based Tourism Encounter](#): Collaborating with residents and the businesses of other local stakeholders, including local guides, experts, local food and accommodation providers, local farms and factories.

COVID-19 makes flexible terms and conditions a must

During the COVID-19 pandemic, tourists were looking for destinations with space, peace, quiet, sufficient

outdoor activities and an attractive natural environment. In addition, tourists began demanding more flexibility in cancelling trips, as well as small-scale, exclusive and self-catering accommodations. According to a travel expert from [Better Places](#), tourists are still seeking these qualities. The flexibility to cancel flights and accommodations has proven popular with tourists, as this gives them more freedom. They are also more likely to book if it is also easy to cancel.

Demand for contributing to and improving gender equality

When travellers choose a holiday destination, their choices are increasingly influenced by ethics and moral values. One aspect that has received more attention recently in Western Europe is the empowerment of women, as ignited by the [Me Too Movement](#). This movement has also affected the tourism industry. European tourists are interested in helping to support and improve the position of local women in the tourist destinations they visit.

Western Europeans value ecotourism activities that contribute to gender equality and that help women become economically independent.

Guidelines and strategies for empowering women and incorporating gender equality into the tourism businesses are available on the website of the UN World Tourism Organization ([UNWTO](#)). The International Labour Organization has published measures that tourism (and other) companies can take to improve the situations of women workers ([UNWTO, 2019, p. 35](#)). Examples include improving working conditions; implementing international labour standards; promoting equality and non-discrimination; providing education, training, social security and maternity protection; and enabling effective social dialogue.

Concerns about the safety of women has also increased demand for [women-only tours](#): holiday packages aimed specifically at women, and run by women. In the past four years, Google searches for the term 'women-only tours' have increased by 400%. In addition, the Solo Female Travelers community on Facebook has more than 140,000 members. One successful example of a company responding to this demand is [3 Sisters Adventure Trekking](#) in Nepal, whose vision is to change the world, one woman at a time. With their mission to empower women, they have attracted a lot of attention in Western countries.

Best Practices for improving gender equality

[Peak DMC, India](#). In India, few women hold positions of leadership or decision-making. In the tourism sector, higher management positions are heavily dominated by men. There are not many women tour leaders, as the job requires being away from home for long periods. Peak DMC has introduced more flexibility specifically to support the needs of women tour operators. For example, women tour leaders are able to go on shorter trips and on trips that both start and end in New Delhi or other central locations, which makes it easier for them to return home between trips. In addition, the company has introduced a mentoring system to support and mentor women during their trips. They also have a zero-tolerance policy on sexual misconduct and harassment ([UNWTO, 2019, p. 36](#)).

[Seven Women Immersion Tour, Nepal](#). The Seven Women Immersion Tour in Nepal started when the owner met seven disabled women working in a tin shed in Kathmandu, Nepal. These women were struggling to survive, thereby facing strong discrimination. The owner arranged for a trainer to teach them how to make products for tourists. She offers trips that allow women travellers to experience grassroots organizations that are empowering local people at the destination.

Environmentally friendly modes of transportation

European tourists are more willing to choose environmentally friendly modes of transportation. Companies can offer more sustainable forms of transportation as part of their business models.

Best practices in environmentally friendly transportation:

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

[Molgo](#) and the [European Tourism Futures Institute](#) carried out this study on behalf of CBI.

Please review our [market information disclaimer](#).