The European market potential for nature tourism

Last updated:
03 January 2023

Nature-based tourism is one of the fastest-growing tourism sectors. The focus is on travel for the purpose of enjoying natural areas and biodiversity on land, water, ice or even snow/ice. Nature-based tourism can take many different forms, including wildlife watching, birdwatching, ecotourism, walking, cycling, fishing, adventure trips or sun and beach tourism. Nature-based tourism can also have the purpose of serving the community (community-based tourism, or CBT) or have scientific, academic, volunteering or educational (SAVE) goals. Within this niche, Germany, France, the Netherlands, Belgium, Poland and the Czech Republic are the most relevant European markets.

Contents of this page

1. Product description

Nature tourism, also known as nature-based tourism, is tourism based on the natural attractions of an area. It consists of responsible travel to experience natural areas and their landscape, plants and animals, protecting the environment and improving the quality of life of locals. ‘Nature-based tourism includes people’s activities when they visit natural areas outside of their usual surroundings’. Figure 1 provides an illustration of this combination of tourism, activities and natural resources.

Figure 1: The components of nature tourism

Source: Fossgard & Fredman (2019)

Ecotourism can be regarded as a specialization within nature tourism. It focuses on learning about the environment, minimizing negative impacts and contributing to environmental protection. The International Ecotourism Society and the Global Ecotourism Network define ecotourism as ‘responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education’ of all parties involved. The main attractions in the ecotourism market are marine, national parks and other parks with protected status, biodiversity, local cultures and traditional protectors of natural environments. Nature tourism and ecotourism attract people who are interested in a variety of natural and cultural resources, or those who are interested in being immersed in rich natural, cultural or historical experiences. Ecotourism is often referred to as sustainable tourism, responsible tourism, soft tourism or green tourism.

A wide array of products fall into the category of nature tourism, including those that are consumptive and adventurous, as well as non-consumptive and contemplative activities. The following are niche markets within the nature tourism sector:

- Wildlife watching
- Birdwatching
- Ecotourism
- Walking tourism
- Cycling tourism
- Fishing
- Adventure tourism holidays
- SAVE tourism
- Community-based tourism
- Adrenaline tourism (a subcategory of adventure tourism)
- Sun and beach tourism

One specific example is the trend of dark-sky tourism to remote areas with a clear view of the night sky, away from artificial light pollution. This could include stargazing, watching an eclipse, watching the Northern or Southern Lights, visiting observatories and participating in guided tours, stargazing sessions and astronomy tours. Dark-sky tourism could be facilitated by staying in nature accommodations (e.g. yurts, specific stargazing hotels or dedicated cruises).

For inspiration, see the following products:

- Hurtigruten and Princess Cruises offer cruises that include stargazing nights. Hurtigruten also provides lectures on astronomy.
- Elqui Domos hotel in Chile has in-room telescopes for guests.
- Baines' Camp in Botswana provides star baths and sky beds.

Tips:

Offer night walks for guests to observe the sky if you are in a remote area.

Invest in low-profile opportunities like a sky bed if you can assure privacy and safety, including from mosquitos, and if your climate allows.

Another example is wilderness tourism, in which tourists seek undeveloped land with minimal human imprints. One example is Wilderness Tourism Tour Company in India. Tourists are drawn into these areas because of their remoteness. Disadvantages include the negative effects of such activities on nature and local communities.

There is a wide assortment of products relating to the category of nature tourism. It is important to note, however, that travellers often combine products during their holidays. They also complement their holidays with other products and services specific to their destinations (e.g. culture, food, relaxation, self-improvement, accommodations and transportation).

Tips:

Employ people from the local community. This contributes to the region, whilst also increasing opportunities for community tourism.

Offer a range of activities, especially those involving the nature around your location.

In your marketing, promote your area's diverse and unique natural attractions, including its biodiversity.

Provide trails and routes of different lengths and difficulty levels to meet the needs of nature and ecotourists of all skill levels and ages. Make sure that these trails do not endanger the local nature and its ecosystem.

Consider producing festivals. When done well, they can contribute to local development goals. They can also raise awareness about local qualities and attract larger or novel target groups.

2. What makes Europe an interesting market for nature tourism?

The demand for nature tourism is high and will continue to grow. For many travellers, nature is a key attraction, and nature-based tourism makes up a significant part of the growing tourism sector worldwide. For example, for countries that are rich in natural resources but suffering from a decline in extractive industries (e.g. forestry, fishing, farming and mining), nature tourism offers an interesting business opportunity that can help to strengthen the regional economy.

For several years, tourists have become more aware of the need to leave a positive impact on the destinations that they visit. According to the UK Travel Foundation, 75% of all British travellers expressed a desire for more responsible vacations in 2012. In the same year, Forum for the Futures estimated that 66% of all travellers wanted an easier way to identify a green holiday. In a 2018 survey by Booking.com, 87% of all global travellers expressed a desire to travel sustainably. Euronews even suggests that there is an ecotravel boom in Europe.

In addition to the types of holidays, consumer preferences for types of accommodations are changing as well. According to the Center for Responsible Travel, interest in sustainable accommodations increased from 62% in 2016 to 65% in 2017, and to 68% in 2018. Meanwhile, the proportion of travellers who had not considered eco-friendly stays because they were unaware of their existence declined from 39% in 2016 to 38% in 2017, and again to 31% in 2018. The results of these studies are in line with the outcomes of a survey conducted amongst the readers of *Condé Nast Traveller*, in which 58% of respondents reported basing their choice of hotel on whether the hotel gives back to local people and the planet.

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

Based on these developments, Virtuoso regards sustainable tourism as part of a global travel transformation, rather than a passing trend. The Skift travel company suggests that sustainability will be the mark of luxury in the years to come. There are several reasons for the rise of interest in nature-based tourism (also known as ecotourism, 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%).

As reported by the Center for Responsible Travel, travellers are increasingly seeking opportunities to reconnect with nature and other people, whilst seeking their own individual meaning. This trend may be in response to an increasingly digitally connected, work-centred and materialistic world.

Another driver of the popularity of nature tourism is 'last-chance tourism', which is motivated by the desire to see threatened or diminishing natural attractions, including glaciers, coral reefs, endangered species and more.

Tips:

- Act sustainably and be transparent about it. Above all, promote your re-use and recycling of materials, waste management and other initiatives.
- Offer opportunities for travellers to contribute to the natural and social values of the destination and reduce their impact.
- Develop customized approaches to ensure that nature tourism fits within the local circumstances.
- Consider serious leisure and project-based leisure for visitors who are extremely interested in a particular leisure activity, or who may be open to a new path in their careers. Such travellers are very committed to achieving their goals. They are therefore more interested in staying longer to learn or to do more, and they are less hindered by barriers in terms of accessibility, travel time and service level.
- Provide multiple reasons to visit your destination (e.g. by combining nature-based tourism with other types of tourism and leisure activities). To do so, seek collaboration with other entrepreneurs within and outside the region to create routes and packages that connect points of interest.

Opportunities and threats brought by the COVID-19 pandemic

The COVID-19 pandemic has had a major impact on tourism in protected nature areas. There have been issues of visitor behaviour, overcrowding and lack of resources. In addition, the livelihoods of local communities and tourism businesses have suffered due to the limited progress in and finance for conservation. On the other hand, the pandemic has had a number of unanticipated benefits. The restrictions on travel linked to COVID-19 have generated a notable trend in nature-seeking tourism. In addition to various threats, this trend has produced multiple business opportunities.

First-time visitors, visitor behaviour and over-tourism are important threats associated with nature tourism. According to *The NY Times*, the COVID-19 pandemic has drawn a considerable group of first-time visitors to parks, landscapes and nature areas. During lockdowns, many people from cities visited parks and other protected areas for the first time, overwhelming staff and generating pleas for more support. The increased visitation of natural resources, especially by first-time visitors, was paralleled by an increase in irresponsible behaviour. In many parks, this behaviour felt uncontrollable. Although observers had reported an increase in first-time visitors and irresponsible behaviour in nature areas even before COVID-19, the pandemic has placed even more pressure on them.

Overcrowding and over-tourism is shifting from a largely urban phenomenon to affect rural and nature areas as well. In a study of 14 protected areas in Europe, *The NY Times* identifies overcrowding, irresponsible behaviour as leading challenges arising during the COVID-19 pandemic. All of these areas reported increases in the number of visitors compared to the previous year, especially during the summer. The growing interest in parks, landscapes and nature sites has made rural and remote areas increasingly prone to overcrowding and over-tourism. Whilst over-tourism is often associated with urban destinations, COVID-19 is likely to have shifted this trend towards rural and nature areas. This trend was already highlighted in a 2018 study commissioned by the European Parliament.

In addition to the challenges that accompany nature tourism, it also generates a number of notable opportunities. The COVID-19 pandemic has clearly revealed a great need for tourism and recreation as a prerequisite for mental well-being. Not being able to go out and be involved in all kind of leisure activities made people realize what they had been missing. Before the pandemic, they had apparently taken this for granted.

The pandemic sparked a need—or a hunger—to be out in nature and undertake all kinds of activities. This came as an eye-opener for many who had previously never visited parks, landscapes and nature areas. Whether these ‘first timers’ will return after the pandemic is not certain. If they do, this will generate a major opportunity (and challenge) for tourism businesses.

For some areas and businesses, the pandemic has opened an opportunity for reconsidering and resetting past practices. For example, in the Mediterranean, which has traditionally focussed on ‘sun and sand’, guided nature walks and visits to traditional farms are offering new opportunities. New activities offered by destinations or businesses can make the total product more diverse, thereby spreading the associated risks. This could reduce the vulnerability of a destination or business and increase its resilience when dealing with changing circumstance

If the trend of nature-seeking tourism persists after the pandemic—and evidence suggests that it will—it will attract more money to nature areas, thereby increasing opportunities for protection and conservation. Experts caution that this will require a significant increase in investments in protected areas. Only then it will be possible to cope with a surge in nature-based tourism that could bring jobs and income to the rural nature areas. The challenge will be to accommodate all these visitors sustainably—in addition to finding a way to finance the work.

The IUCN lists 5 key opportunities for nature tourism to protected areas due to the influence of COVID-19:

- Recovery: Many protected areas have experienced ecological recovery and restoration.
- Regeneration: There has been increased interest in, and demand for, nature-based tourism and sustainable travel.
- Reflection: We have a unique opportunity to rethink the way we travel and experience tourism in protected areas.
- Resilience: There is increased recognition of the value of adopting more sustainable models of tourism.
- Responsibility: There is a growing awareness of the importance of collaborative structures of management.

Tips:

Capitalize on the increased interest in nature-based tourism by encouraging return visits.

Help to educate new visitors to make them more aware of the nature of the area (e.g. by providing tourist information about the nature in the area and its value).

Partner with nature-protection management agencies to involve them in educating visitors.

Explore opportunities for adding conservation funds to your business model, and use the money to re-invest in the protection and development of park, landscape and nature areas (the assets nature-based tourism depends on).

3. Which European countries offer the most opportunities for nature tourism?

Germany, France, the Netherlands, Belgium, Poland and the Czech Republic have the largest share of outbound trips with nature as the primary motive. These countries are regarded as the most relevant markets for nature tourism in Europe, with Germany as the clear leader (see Table 1).

Table 1: Top European markets for nature tourism

	Outbound overnight trips 2019, in millions	Percentage of holiday travellers listing nature as a primary motive for choosing a holiday destination (2021)	Indication of the number of outbound overnight trips with nature as a primary motive, in millions
Germany	99.5	18%	17.91
France	29.6	17%	5.03
Netherlands	22.0	29%	6.38
Belgium	14.2	21%	2.98
Poland	13.5	16%	2.16
Czech Republic	7.3	12%	0.88

Sources: Statista, Eurobarometer 499

Europe has a large target market for nature tourism. The first studies on the nature tourism market were probably the 2001 and 2002 UN World Travel Organization (UNWTO) studies conducted in the UK, Germany, Spain, France and Italy, which have not been updated. In a 2016 study by TNS Travel, respondents in the following countries listed 'nature' as the main reason for their holiday: Czech Republic (26%), Netherlands (25%), Bulgaria (23%), Romania (20%), Belgium (19%) and Poland (19%). Hover your cursor or pointer over the map below to see the percentage of travellers favouring nature travel in each European country.

It is important to note that these statistics are based on preferences. Because people in Western and Northern Europe generally have more money to spend, they are also likely to spend more on nature tourism. Remember that these statistics reflect a preference for nature itself, and not specifically for nature tourism, which also includes adventure tourism. Preferences for adventure tourism are included in our study on adventure tourism.

To see the proportion of the travellers in each country who base their destination choices on the natural environment, hover your cursor over the countries shaded in blue in Figure 2.

Germany: The largest market for nature tourism

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

Regardless of the duration of their holidays, most Germans like to purchase the components of their holidays themselves and separately (each 44%). This might explain the considerable variation in how they book their holidays. Booking commercial services online (28%), booking private housing online (23%), booking over the counter of a travel agency (27%) and booking through a friend (26%) all account for similar shares.

Most Germans prefer to stay in paid commercial accommodations, such as hotels, B&B, cruises or youth hostels, whether for short (47%) or long (54%) holidays. During the orientation phase of a holiday, most Germans rely on recommendations from others (44%) or on their own personal experience (39%).

Table 2: German key attitudes towards tourism

Motivation:	• Nature as primary reason: 18% • Nature as secondary reason: 31% • Nature as primary or secondary reason: 48%
Most popular type of accommodations:	• If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (54%) • If 4–13 nights: paid commercial accommodations (47%)
Most frequent type of holiday:	• If >13 nights: Tourist services purchased separately (44%) • If 4–13 nights: Tourist services purchased separately (44%)
Most popular destination regions with developing countries:	• Asia and Oceania (5%) • North Africa and Middle East (3%) • Caribbean, Central and South America (2%)
Most popular booking method:	• Online commercial services, excl. private housing owned by individuals (28%) • Through an acquaintance (26%) • Over the counter at a travel agency (27%) • Online commercial services—private housing owned by individuals (23%)
Most important reasons to return to the destination (primary and secondary reason combined):	• 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:	• 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:	• Recommendations from friends, colleagues and relatives (44%) • Personal experience (39%)
Region of residence:	• Rural area or village (41%) • Small or middle-sized town (40%) • Large town (18%)

Source: EU Barometer 432, EU Barometer 499

France: Nature as a primary reason to return to a destination

Of the top six European countries, France has the fewest travellers who identify nature as a primary motive for visiting a destination (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%).

French travellers 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 source of information when French travellers are planning their holidays (57%).

Table 3: French key attitudes towards tourism

Motivation:	• Nature as primary reason: 17% • Nature as secondary reason: 20% • Nature as primary or secondary reason: 48%
Most popular type of accommodations:	• 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 paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (30%)
Most frequent type of holiday:	• 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:	• North Africa and Middle East (6%) • Asia and Oceania (4%) • Caribbean, Central and South America (3%)
Most popular booking method:	• Online commercial services, such as tour operators and airline companies (33%) • Online commercial services—private housing owned by individuals (25%)
Most important reasons to return to the destination (primary and secondary reason combined):	• Natural features, such as landscape and weather conditions (58%) • Quality of accommodations (32%) • Cultural and historical attractions (36%)
Most important primary reasons to return to the destination:	• 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:	• Recommendations from friends, colleagues and relatives (57%) • Websites collecting and presenting comments, reviews and ratings from travellers (40%) • Personal experience (37%)
Region of residence:	• Rural area or village (35%) • Small or middle-sized town (47%) • Large town (18%)

Source: EU Barometer 432, EU Barometer 499

The Netherlands: Nature as the reason for visiting a destination

More than one quarter (29%) of all Dutch travellers identify nature as the primary reason for visiting a destination. Almost 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.

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:	• Nature as primary reason: 29% • Nature as secondary reason: 26% • Nature as primary or secondary reason: 54%
Most popular type of accommodations:	• If >13 nights paid commercial accommodations, such as hotels, B&B, cruises and 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:	• 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:	• Asia and Oceania (5%) • Caribbean, Central and South America (4%) • North Africa and Middle East (3%)
Most popular booking method:	• Online commercial services, such as tour operators and airline companies (44%) • Online commercial services—private housing owned by individuals (27%)
Most important reasons to return to the destination (primary and secondary reason combined):	• 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:	• 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:	• 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:	• Rural area or village (43%) • Small or middle-sized town (34%) • Large town (23%)

Source: EU Barometer 432, EU Barometer 499

Belgium: Nature as a primary reason to return to a destination (like the French)

One out of five (21%) Belgian travellers see nature as the primary reason for visiting a destination, with more than twice as many (51%) mentioning 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 5: Belgian key attitudes towards tourism

Motivation:	• Nature as primary reason: 21% • Nature as secondary reason: 21% • Nature as primary or secondary reason: 41%
Most popular type of accommodations:	• 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:	• 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:	• Asia and Oceania (5%) • North Africa and Middle East (5%) • Caribbean, Central and South America (3%)
Most popular booking method:	• Online commercial services, such as tour operators and airline companies (38%) • Online commercial services—private housing owned by individuals (28%) • Through an acquaintance (28%)
Most important reasons to return to the destination (primary and secondary reason combined):	• 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:	• 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:	• Recommendations by friends, colleagues and relatives (51%) • Websites collecting and presenting comments, reviews and ratings from travellers (38%) • Personal experience (38%)
Region of residence:	• Rural area or village (45%) • Small or middle-sized town (38%) • Large town (16%)

Source: EU Barometer 432, EU Barometer 499

Poland: The emerging source market for nature tourism

About one fifth (16%) of all Polish tourists identify nature as the primary reason for visiting a destination, with many more (58%) seeing nature as the main reason to return. In the case of long holidays (>13 days), Polish travellers like to purchase and compose their own arrangements (45%), most frequently using online commercial services—private housing owned by individuals (35%). For these long holidays, most Polish tourists (43%) like to stay in paid commercial accommodations, such as hotels, B&B, cruises and youth hostels. Recommendations from friends, colleagues and relatives are clearly the most popular sources of information for Polish travellers making holiday decisions (61%).

Table 6: Polish key attitudes towards tourism

Motivation:	• Nature as primary reason: 16% • Nature as secondary reason: 22% • Nature as primary or secondary reason: 38%
Most popular type of accommodation:	• If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (43%) • If 4–13 nights: paid commercial accommodations (43%)
Most frequent type of holiday:	• If >13 nights: tourist services purchased separately (45%) • If 4–13 nights: tourist services purchased separately (51%)
Most popular destination regions with developing countries:	• Asia and Oceania (2%) • North Africa and Middle East (2%) • Caribbean, Central and South America (1%)
Most popular booking method:	• Online commercial services, private housing owned by individuals (35%) • Telephone (24%) • Through an acquaintance (21%)
Most important reasons to return to the destination (primary and secondary reason combined):	• Natural features, such as landscape and weather conditions (34%) • General level of prices (12%) • Cultural and historical attractions (11%) • Quality of accommodations (11%)
Most important primary reasons to return to the destination:	• Natural features, such as landscape and weather conditions (36%) • Quality of accommodations (10%) • Cultural and historical attractions (13%)
Most important source of information for decision-making:	• Recommendations from friends, colleagues and relatives (61%) • Websites collecting and presenting comments, reviews and ratings from travellers (36%) • Personal experience (30%)

Region of residence:	• Rural area or village (34%) • Small or middle-sized town (34%) • Large town (32%)

Source: EU Barometer 432, EU Barometer 499

Czech Republic: Emerging market for packaged travel

Slightly more than one tenth (12%) of all Czech travellers identify nature as the primary reason for visiting a destination. More than four times as many (59%) mention nature as a reason to return. Most Czech travellers like package travel, but not all-inclusive packages (long holidays, 36%; short holidays, 37%).

Czech travellers use three main methods for booking their holidays: through acquaintances (26%), online commercial services—private housing owned by individuals (24%) and online commercial services, such as tour operators and airline companies (24%). During these holidays, most of these travellers prefer paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (long holidays, 42%; short holidays, 46%). During the preparation phase, recommendations from friends, colleagues and relatives (58%) are the most important sources of information for Czech travellers.

Table 7: Czech key attitudes towards tourism

Motivation:	• Nature as primary reason: 12% • Nature as secondary reason: 19% • Nature as primary or secondary reason: 30%
Most popular type of accommodations:	• If >13 nights: paid commercial accommodations, such as hotels, B&B, cruises and youth hostels (42%) • If 4–13 nights: paid commercial accommodations (46%)
Most frequent type of holiday:	• If >13 nights: package travel, excl. all-inclusive packages (36%) • If 4–13 nights: package travel, excl. all-inclusive packages (37%) and tourist services purchased separately (35%)
Most popular destination regions with developing countries:	• North Africa and Middle East (3%) • Asia and Oceania (2%) • Caribbean, Central and South America (1%)

Most popular booking method:	• Through an acquaintance (26%) • Online commercial services—private housing owned by individuals (24%) • Online commercial services, such as tour operators and airline companies (24%)
Most important reasons to return to the destination (primary and secondary reason combined):	• Natural features (59%) • Cultural and historical attractions (35%) • Quality of accommodations (33%)
Most important primary reasons to return to the destination:	• Natural features, such as landscape and weather conditions (36%) • Cultural and historical attractions (13%) • Quality of accommodations (10%)
Most important information sources for decision making:	• Recommendations from friends, colleagues and relatives (58%) • Websites collecting and presenting comments, reviews and ratings from travellers (43%) • Personal experience (42%) • Websites run by service providers or destinations (25%)
Region of residence:	• Rural area or village (34%) • Small or middle-sized town (44%) • Large town (22%)

Source: EU Barometer 432, EU Barometer 499

Tip:

Target the Netherlands. Of the six European countries presented, this one has the highest average income, and tourists have a high level of interest in nature. For more information, study the market profile of the Netherlands.

4. Which trends offer opportunities in the European market for nature tourism?

The demand for nature tourism is large and will probably grow further. Its growth is related to two trends in the European travel market: an increasing demand for sustainable holidays and growing attention to travel related to health and wellness.

Increasing demand for sustainable holidays

Travellers are becoming increasingly aware of and concerned with sustainability. When choosing holiday destinations, they are increasingly influenced by ethics, moral values, concerns about the environment and its ecosystems (including the protection of plants and animals) and a desire to have a positive impact on local communities. These travellers demand affordability and the availability of environmentally friendly, sustainable and socially responsible tourism services and products. They seek to reduce the carbon footprint of their holidays, and many also wish to improve the destination as well. For this reason, do-good/feel-good holidays and ecological tours are growing in popularity.

Various sources (e.g. the Wildsea Network and others) have reported that ecotourists are generally willing to pay more for experiences, at least if they are authentic and meaningful. Higher revenues make it possible to hire more qualified staff and offer better travel experiences. At the same time, however, 42% of all tourists identify cost as an obstacle to travelling more sustainably. It might therefore be easier to target tourists with more mainstream, nature-based interests and those seeking adventure activities, instead of focussing on ecotourists.

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

The UNWTO has a dedicated platform for tourism initiatives relating to the Sustainable Development Goals: Tourism for SDGs. The UNWTO book Tourism for Development – Volume II: Good Practices contains numerous examples of good practices. Other resources include:

- Global Himalayan Expedition, India
- Las Terrazas Complex, Cuba

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

In nature tourism:

- 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.
- Shewula Mountain Camp in Swaziland invites travellers to stay in their village and experience the rural lifestyle and culture of a Swazi community.

Environmentally friendly practices:

- Uniworld Cruises 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.

Protection of cultural and natural heritage:

- Three Camel Lodge in Mongolia was built using ancient Mongolian Buddhist building techniques, without nails or iron work.

Social responsibility and benefit-sharing:

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

Tips:

Study the UN Sustainable Development Goals. This can help you to identify short-term and long-term priorities. In the short term, you could start small. For example, try to reduce waste by implementing reusable dishes, providing clear rules for customers or involving them in contributing to sustainability in a beach clean-up ('plogging'). In the long term, the UN Sustainable Development Goals could help you to develop a strategy that integrates protecting the destination and promoting environmental leadership and community health into the experiences of travellers.

Contribute to the quality of life and well-being in the local community, including economic and sociocultural well-being and fair income. For examples, see Table 8 below.

Be sure to have a good online presence targeting and matching the needs of nature tourists. In general, ecotourists are particularly likely to know what they want, and they tend to be quite independent. They will often plan and book their own trips and arrange for their own travel needs and experiences.

Try to have your business certified if you are working to make it more environmentally friendly or more sustainable. This will make your business more visible to consumers who consider these labels during the planning phase of their holidays.

Make your business or product more sustainable. For example, you could use renewable energy sources, increase energy efficiency, optimize the use of resources, promote environmental protection, invest in waste management and waste reduction (e.g. reducing plastic waste by eliminating plastic straws) and/or address carbon emissions, pollution and litter.

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

Initiative	Country or region	Example
Conservation of natural and cultural heritage and biodiversity	Romania Sumatra, Indonesia Botswana	Ecotourism Romania Bukit Lawang in North Sumatra Gudigwa cultural village
Participation involving the local community in planning and development	Curaçao	Kura Hulanda

Poverty alleviation	Various countries Kwazulu-Natal, South Africa	ST-EP initiatives worldwide Ndumo Wilderness Camp
Collaborating with residents and other local stakeholder businesses, including local guides, experts, local food and accommodation providers, local farms and factories	East Africa	East Africa Community Based Tourism Encounter

Source: ETFI

Health, wellness and sports holidays

Health and healthy lifestyles are playing an increasingly important role in the decision-making processes of tourists. Various factors are driving this trend, including ageing tourists, the typical lifestyles of Generations Y and Z, the growing middle class and the technological and digital revolution. Wellness tourism is soaring in Europe. In a 2015 Eurobarometer survey of 33,000 people in 33 European countries, 13% of all respondents identified wellness, spa facilities and health treatments as their primary or secondary motivation for going on holiday.

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

A large part of wellness tourism and the sub-sector with the greatest increases over the past few years consists of people who simply wish to stay healthy. This market offers many opportunities in nature and ecotourism for SMEs, including:

- Activities in nature combined 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.

Tips:

Read the Global Wellness Economy Monitor from the Global Wellness Institute, which provides relevant background information on this market segment.

Read our report on sports-related tourism or wellness tourism to gain more insight into these niche markets.

Molgo and ETFI carried out this study on behalf of CBI.

Please review our market information disclaimer.