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Ecotourism Outlook 2015
Prepared for the 2015 Outlook Marketing Forum

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Ecotourism and Green Economy

What is Ecotourism? – The Essentials Update 2015!

Ecotourism is tourism done in a specific way that follows a set of principles promoting social, environmental and economic sustainability. When implemented properly based on these principles, it exemplify the benefits of responsible tourism development and management.

After 25 years, TIES has revised its **Definition and Principles** created by the founding members in 1990. TIES has implemented small changes and additions to both the principles and the definition to provide more clarity, eliminate the ambiguity, and therefore reduce the greenwashing and wrongful interpretations being practiced by in the tourism industry.

ECOTOURISM DEFINITION:

Because the TIES existing definition included only two (Conservation and Local Communities) of the three pillars of Ecotourism the inclusion **Interpretation** now holds a place.

Therefore, TIES revised definition is....

“Responsible travel to natural areas that conserves the environment, sustains the well-being of the local people and involves interpretation and education” (TIES, 1990; updated 2014).

This definition clearly outlines the key components of ecotourism: conservation, communities and sustainable travel. Ecotourism represents a set of principles that have been successfully implemented in various communities, and are supported by extensive industry practice and academic research. Those who participate in ecotourism activities should follow the following principles of ecotourism (TIES, 1990; 2014):

Twenty four years since TIES was started, it is important to re-visit three principles found in TIES literature – that ecotourism:

- is **NON-CONSUMPTIVE / NON-EXTRACTIVE**
- creates an ecological **CONSCIENCE**
- holds eco-centric values and **ETHICS** in relation to nature

TIES hopes this gives to give clarity to those activities that are considered **CONSUMPTIVE / EXTRACTIVE** and which cause behavioral and psychological impacts on non-human species.

TIES consider non-consumptive and non-extractive use of resources for and by tourists and minimized impact to the environment and people as major characteristics of **authentic ecotourism**.

Since 1990, when TIES first created the framework of ecotourism principles, we understand more about the tourism industry through scientific and design related research, and are also better informed about environmental degradation and impacts on local cultures and non-human species.

Ecotourism is about uniting conservation, communities, and sustainable travel. This means that those who implement, participate in, and market ecotourism activities should adopt the following ecotourism principles:

- Minimize physical, social, behavioral, and psychological impacts.
- Build environmental and cultural awareness, and respect.
- Provide positive experiences for both visitors and hosts.
- Produce direct financial benefits for conservation.
- Generate financial benefits for both local people and private industry.
- Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries' political, environmental, and social climates.
- Design, construct and operate low-impact facilities.
- Recognize the rights and spiritual beliefs of the Indigenous People in your community and work in partnership with them to create empowerment.

This does not mean that ecotourism is only be accomplished at a particular service level and specific locations (i.e., roughing it in tropical jungles). On the contrary, the principles are there as benchmarks to guide a range of tourism activities involving nature – from luxury, adventure to rural, culinary to educational. Just as there are many different types of ecotourism businesses, ecotourism appeals to a wide range of travelers, of all ages and interests—and considers nature as the primary motivation for engagement. Interestingly, luxury travel is embracing sustainability, as sustainable tourism is progressing into an industry-wide priority. Trends in recent years have included elements such as: creating experiences that place travelers closer to nature, visually and proximally, embedding sustainability into the guest experience (e.g., pedal power for television viewing, tree plantings, visiting schools and supporting local community initiatives, etc.)¹.

As with previous reports, these concepts are important when identifying trends, the very of nature-based focused tourism integrates many trends relative to adventure travel, outdoor recreation, business, and of course the mainstream tourism industry.

Continued from 2014-Being Green is “Still” Profitable

Among the most critical developments that have taken place in recent years – not only within the travel and tourism industry but also in the business community at large – is the growing realization that sustainability makes business sense.² In 2010, the United Nations Environmental Programme (UNEP) solidified the business case for sustainable tourism development in the Green Economy Report³.

The key aim for a transition to a green economy is to enable economic growth and investment while increasing environmental quality and social inclusiveness. Critical to attaining such an objective is to create the conditions for public and private investments to incorporate broader environmental and social criteria. In addition, the main indicators of economic performance, such as growth in Gross Domestic Product (GDP) need to be adjusted to account for pollution, resource depletion, decline ecosystem services, and the distributional consequences of natural capital loss to the poor.⁴

¹ Pedro, Lola (2013). Sustainable, responsible tourism: Luxury travel's new trend. The Telegraph Media Group Limited, March 15, 2013

² Esty, D.C. and Winston, A. S. (2006). Green to Gold: How smart companies use environmental strategy to innovate, create value, and build competitive advantage. Yale University Press, New Haven, CT.

³ UNEP, 2011, Towards a Green Economy: Pathways to Sustainable Development and Poverty Eradication, www.unep.org/greeneconomy

⁴ IBID, p. 16.

“Being green is profitable,” continues to be a key message at the Ecotourism and Sustainable Tourism Conference (ESTC), the leading international industry platform focusing on sustainability in tourism.⁵ Through conferences from 2007 to 2015, industry and government leaders have emphasized the importance of environmentally responsible business practices in ensuring the financial, as well as social and environmental sustainability of travel and tourism. This is a trend growing not only at the business level, but at the destination level as well. In fact, in April of 2015, the Ministry of Tourism of Ecuador and the Global Sustainable Tourism Council (GSTC) have partnered to create standards for sustainability in the travel and tourism sector throughout Ecuador. This trend is continuing, with destinations identifying the need for comprehensive sustainable tourism partnerships and management plans.⁶

Business Case for Sustainability in Tourism

The business case for sustainability has taken on increased significance with the global economic downturn, and with the renewed and increasing interest in the new opportunities that a green economy can bring. Ecotourism businesses that have successfully incorporated sustainability practices into their operations and enhanced their financial bottom line through sustainable business models are seen as industry leaders at the forefront of the growth of today’s “green collar economy.”

At the ESTC and in other forums, we are seeing an increase in operators and resorts hiring specifically for positions such as Environmental Program Coordinators and Sustainability Managers to help them achieve sustainable management and development goals.⁷ Concurrently, efforts to address sustainability opportunities through business operations have moved into evaluation of the supply chain, thus forging new and diverse partnerships in developing “business to business” relationships.

According to the Green Economy Report, the business case is stronger for greening the tourism industry based on the significant potential to address some of the major societal issues and challenges. These trends are summarized as follows⁸:

- Green tourism has the potential to create new, green jobs. Travel and tourism are human-resource intensive, employing directly and indirectly 8 per cent of the global workforce. It is estimated that one job in the core tourism industry creates about one and a half additional or indirect jobs in the tourism related economy. The greening of tourism, which involves efficiency improvements in energy, water and waste systems, is expected to reinforce the employment potential of the sector with increased local hiring and sourcing and significant opportunities in tourism oriented toward local culture and the natural environment.
- Tourism development can be designed to support the local economy and reduce poverty. Local economic effects of tourism are determined by the share of tourism spending in the local economy as well as the amount of the resulting indirect economic activities. Increasing the involvement of local communities, especially the poor, in the tourism value chain can, therefore, contribute to the development of the local economy and to poverty reduction. For example, in Panama, households capture 56 per cent of total local tourism income. The extent of direct benefits to communities and poverty reduction will largely depend on the percentage of tourism needs that are locally supplied, such as products, labor, tourism services, and increasingly “green services” in energy and water efficiency and waste management. There is increasing evidence that more sustainable tourism in rural areas can lead to more positive poverty-reducing effects.

⁵ ESTC 2007, 2008, 2010, 2011, 2012. Ecotourism and Sustainable Tourism Conference. The International Ecotourism Society, Washington D.C. Retrieved October 13, 2015, from <http://www.ecotourism.org>.

⁶ Global Sustainable Tourism Council, see <http://www.gstcouncil.org/en/about/news.html?start=10>, retrieved October 12, 2015.

⁷ Schendler, A. (2009). *Getting Green Done*. Perseus Books Group, Public Affairs, NY, NY.

⁸ UNEP, 2011, *Towards a Green Economy: Pathways to Sustainable Development and Poverty Eradication*, www.unep.org/greeneconomy

- Investing in the greening of tourism can reduce the cost of energy, water and waste and enhance the value of biodiversity, ecosystems and cultural heritage. Investment in energy efficiency has been found to generate significant returns within a short payback period. Improving waste management is expected to save money for tourism businesses, create jobs and enhance the attractiveness of destinations.
- The investment requirement in conservation and restoration is small relative to the value of forests, mangroves, wetlands, and coastal zones including coral reefs, which provide ecosystem services essential for the foundation of economic activities and for human survival; the value of ecosystems for tourists remains undervalued in many cases. Investment in cultural heritage—the largest single component of consumer demand for sustainable tourism—is among the most significant and usually profitable investments.
- Much of the economic potential for green tourism is found in small and medium-sized Enterprises (SMEs), which need better access to financing for investing in green tourism. The majority of tourism businesses are SMEs with potential to generate greater income and opportunity from green strategies. Their single greatest limiting factor for greening, however, is lack of access to capital. Governments and international organizations can facilitate the financial flow to these important actors with an emphasis on contributions to the local economy and poverty reduction. Public-private partnerships can spread the costs and risks of large green tourism investments. Besides reducing administrative fees and offering favorable interest rates for green tourism projects, in-kind support such as technical, marketing or business administration assistance, could also help.

Trend Increases: Development of Sustainable Tourism Destinations

The Global Sustainable Tourism Council (GSTC) Destination Criteria—A Continued Focus

The promotion and widespread use of recognized standards for sustainable tourism, such as the Global Sustainable Tourism Criteria, can help businesses and destinations improve sustainability performance, including resource efficiency, and assist in attracting additional investment and customers.

In 2012, the Global Sustainable Tourism Council (GSTC) introduced the GSTC Destination Level Criteria.⁹ To satisfy the definition of sustainable tourism, destinations must take an interdisciplinary, holistic and integrative approach which includes four main objectives: to (i) demonstrate sustainable destination management; (ii) maximize social and economic benefits for the host community and minimize negative impacts; (iii) maximize benefits to communities, visitors and cultural heritage and minimize impacts; and (iv) maximize benefits to the environment and minimize negative impacts.¹⁰

Examples of Destination Stewardship

Destination stewardship is an approach to tourism development in which local communities, governmental agencies, NGOs and the tourism industry are dedicated to taking a multi-stakeholder approach to maintaining the cultural, environmental, economic, and aesthetic integrity of their country, region, state, or town through sustainable policy and management frameworks.

A tourism destination is defined by the GSTC for this program as a geographic area currently or potentially attractive to tourists. Destination size is generally a space that one can transit within a day, although there may be exceptions. Local tourism destinations incorporate various stakeholders often including a host community, and can nest and network to form larger destinations. This is intended to be a guideline for applicants.

⁹ Global Sustainable Tourism Council (2012). Destination Criteria. Retrieved September 2014, from GSTCouncil.org.

¹⁰ IBID.

Initially, the GSTC launched the baseline sustainable tourism criteria and indicators in six destination types, the efforts are now continuing in other destinations around the world. These include: Jackson Hole, WY; Lanzarote, Canary Islands; Botswana's Okavango Delta Ramsar Site; Huangshan, China; Fjord Norway; St. Kitts and Nevis. Due to the programs popularity, destination level evaluations have to Peru's Cuzco-Sacred Valley-Machu Picchu; Chile's Lakes District; South Sardinia, Italy; Naboisho Conservancy, Kenya; St Croix, Virgin Islands; Sierra Gorda, Mexico; Riviera Maya, Mexico; Samoa; and St. Kitts and Nevis.¹¹

Another trend for many destinations is to explore the resiliency of a destination through crisis preparedness plans. Preparedness for a crisis, be it natural disasters, terrorism, crime, etc. assists destinations in sustainable management and the development of action plans—hence continued market share or recovery.¹²

Ecotourism Participation Trends in the United States

Outdoor Recreation and Low-Impact Nature Travel Trends in the U.S.

Although at present there is no direct data collected to summarize various trends in ecotourism in the United States¹³, statistics on outdoor participation can be utilized to evaluate patterns related to ecotourism development. Outdoor and adventure recreation is closely aligned to the types of human powered activities “ecotourists” tend to engage in while experiencing the outdoors. One of the sources of information used to gauge trends is the Outdoor Foundation's Outdoor Recreation Participation Topline Report 2015¹⁴, which reports that nearly half of all Americans participated in at least one outdoor activity in 2014. This equates to 141.4 million participants age six and older engaging in outdoor recreation—and who went on a collective 11.8 billion outings in the outdoors.¹⁵ This is slightly down from 2013, when Americans took an average of 84.6 outdoor outings per participant for a total of 12.1 billion outings overall.¹⁶ However, the overall trend from 2006-2014 remains steady with participation rates generally between 48.4 to 50% of all Americans participating in outdoor recreation.

Among the most important trends in outdoor recreation participation in the U.S. is the growing support for non-consumptive and non-motorized activities. For the younger generation (i.e., ages 6 to 24) birdwatching ranked 5th with an average of 22.9 outings per birdwatcher, with 83 million total outings; and, wildlife viewing ranked 5th among the favorite youth outdoor activities with an average of 21.7 million outings per wildlife viewer, with 61.9 million total outings—which is slightly down from 107.7 million total outings in 2013.¹⁷ For adults, nature was just as important. Adults 25+, identified birdwatching as the 3rd favorite activity (same as last year), with an average of 39.1 outings per birdwatcher (which is slightly up from last year 37.7 average outings), and 409.7 million total outings; wildlife viewing continued to rank 4th with an average of 28 outings per wildlife viewer (compared to 25.2 outings in 2013) and 450.1 total outings (compared to 413.4 million total outings in 2013)¹⁸.

¹¹ IBID

¹² University of Florida Crisis Tourism Crisis Management Institute (2013). Personal communication.

¹³ The International Ecotourism Society is developing partnerships to create a more comprehensive approach to identifying and evaluating ecotourism market data in the United States and in various countries and regions around the world. The research project will be announced at the Ecotourism and Sustainable Tourism Conference (September 2013, Nairobi, Kenya)

¹⁴ Outdoor Foundation (2015). Outdoor Recreation Participation Topline Report (2015). Outdoor Industry Foundation, Boulder, CO.

¹⁵ Ibid, p. 1.

¹⁶ Outdoor Foundation (2015). Outdoor Recreation Participation Topline Report (2015). Outdoor Industry Foundation, Boulder, CO.

¹⁷ Ibid, p. 2

¹⁸ Ibid, p. 4

Over the past year, the biggest 1 year change percentage increases in outdoor activities, non-motorized included: stand-up paddling (38%), downhill telemarking (26%), board sailing/windsurfing (18%), snowshoeing (16%), kayak fishing (15%), freestyle skiing (14%), cross country skiing (13%), backpacking (11%), trail running (11%), and whitewater kayaking (10%).¹⁹ While this does not necessarily demonstrate ecotourism increases, it does indicate a trend towards a ‘return to nature’ focus among travelers interested in non-consumptive and non-motorized (low-impact) nature-based activities, as well as interest in the ocean environment.

National Park Visitation

According to the National Park Service,²⁰ National park annual visitation report, visitation and backcountry use is up from previous years significantly in all recreation visitation. Park ‘system’ visits are up from from last year (see table below). Unlike last year, where decreases occurred, all types of outdoor camping visitors have increased (Table 1).

Year	Recreation Visits	Tent Camper Overnights	RV Camper Overnights	Backcountry Camper Overnights
2001	279,873,926	3,326,852	2,404,840	2,032,886
2002	277,299,880	3,357,513	2,404,824	1,906,473
2003	266,099,641	3,302,637	2,400,232	1,816,088
2004	276,908,337	3,128,014	2,321,669	1,725,309
2005	273,488,751	2,974,269	2,168,287	1,668,558
2006	272,623,980	2,882,297	2,109,404	1,659,484
2007	275,581,547	3,003,270	2,107,541	1,704,059
2008	274,852,949	2,959,761	2,012,532	1,797,912
2009	285,579,941	3,184,255	2,150,170	1,860,162
2010	281,303,769	3,277,151	2,256,692	1,763,541
2011	278,939,216	3,229,241	2,155,330	1,715,611
2012	282,765,682	3,203,413	2,121,646	1,816,904
2013	273,630,895	2,768,708	1,791,921	1,573,734
2014	292,800,082	3,246,320	2,053,965	1,888,095

Table 1: Summary of Visitor and Recreational Trends in National Parks²⁸

National Park Units primarily associated with nature-based activities also demonstrated increases overall. Table 2 displays a comparison between 2014 and 2013 regarding visitation levels to a selection of National Park Units. With the exception of National Reserves, and National Seashores, who demonstrated slight decreases from 2013, the visitation trend is upwards.

Table 2. Visitation by Park Units-A comparison between 2014 and 2013.²¹

Administered by Type	Percent Increase/ Decrease	Recreation Visits 2014	Recreation Visits 2013
National Lakeshore	1%	3,766,729	3,745,708
National Monument	31%	24,454,576	18,660,138
National Park	9%	68,928,098	63,514,727
National Parkway	4%	28,525,215	27,479,002
National Preserve	10%	3,226,362	2,934,230
National Recreation Area	3%	45,218,953	43,997,058
National Reserve	-0.09%	94,825	94,906

¹⁹ Ibid, p. 5

²⁰ National Park Service Social Science Program, Public Use Statistics Office (2015). Visitor Data Summary. Last Retrieved October 10, 2015, from: Adapted from data retrieved on 10/12/2015 from: [https://irma.nps.gov/Stats/SSRSReports/National%20Reports/Current%20Year%20Monthly%20and%20Annual%20Summary%20Report%20\(1979%20-%20Present\)](https://irma.nps.gov/Stats/SSRSReports/National%20Reports/Current%20Year%20Monthly%20and%20Annual%20Summary%20Report%20(1979%20-%20Present))

²¹ National Park Service Annual Reports. Retrieved on October 10, 2015 from <https://irma.nps.gov/Stats/Reports/National>

National River	8%	4,463,836	4,115,927
National Seashore	-0.63%	18,546,676	18,664,804
National Wild & Scenic River	28%	1,345,168	1,048,316
Park (Other)	18%	8,642,253	7,337,542

A Global Summary and Outlook

Overall, the trend of consumers of travel demanding more individual and authentic travel experiences, which ecotourism can provide, continues. Moving forward, travel and tourism experts agree, “Consumers will seek new and more authentic experiences...” and more interaction with local communities.²² There is continued growth in adventure and experiential travel, blending physical adventure with wildlife and nature providing the features people seek.

Traveler Engagement (similar to 2014)

At the recent Ecotourism and Sustainable Tourism Conference (ESTC 2015) Quito, Ecuador, presentations from the industry and academe identified ecotourism’s current trends. In summary, these included the following:

Protection of Biodiversity is Key to Successful Ecotourism Businesses

Ecuador highlighted what private enterprise can do by working in partnership with the government to protect unique habitat and monitor impacts. There was increased interest in how to manage visitors and visitor impacts, monitoring wildlife, and enhancing the ecotourism experience, including sustainable production and consumption and increased interest in the value chain. This has created a destination focus for planners and managers to ensure the cumulative impacts of development do not negatively affect a destinations “natural capital.”

Social media is being utilized for pre-trip planning, communicating during their trip, and post by adventure travelers, which includes eco-minded travelers as well. In a recent study conducted by the Adventure Travel Trade Association (ATTA), the top five social media networks for adventure travelers included: Facebook, YouTube, Google, Twitter, and LinkedIn.²³

Connecting the Human to the Heart

Traveler engagement is seen critical to the ecotourism experience. Interpretation and “experiencing” nature are key factors in the travel experience. ATTA’s recent market study found that “many travelers are no longer satisfied with sitting on a beach or shopping...they seek adventure experiences that highlight the natural and cultural assets that make a place distinct from any other...”²⁴ The ESTC 2015 in Quito, Ecuador, presentations supported this trend as well, and the 2012 National Travel & Tourism Strategy endorses the tremendous growth in participatory and engaged travel experiences, by adding that “nature-based, culture-based, heritage and outdoor adventure travel represent a significant segment of the outbound tourism market (some 10 million U.S. travelers in total).²⁵

Living like a local

Another trend which supports this connection was identified by ABTA, and called ‘Living like a local.’ This trend has become an essential part of getting under the skin of a destination for many travelers. According to ABTA, they are looking for more “authentic holiday experiences and many holiday companies are now offering people the chance to enjoy hidden gems alongside traditional tourist attractions.” Travel professionals, blogs and social media

²² IKP International (2015). ITB World Travel Trends Report, p. 18. Retrieved October 14, 2015 from http://www.itb-berlin.de/media/itbk/itbk_dl_en/WTTR_Report_A4_4_Web.pdf.

²³ Adventure Travel Trade Association (2013). Adventure Tourism Market Study 2013. Adventure Travel Trade Association and The George Washington University.

²⁴ Ibid, page 14.

²⁵ National Travel & Tourism Strategy (2012). National Travel & Tourism Strategy: Task Force on Competiveness. Department of Commerce, Department of Interior. United States Government, p. 8.

are also popular ways to uncover hidden hotspots and there are tangible benefits for communities and the local environment as demand for 'authentic experiences' strengthens.

Americans travelled more in 2014 as economic conditions improved, not only travelling more but also staying longer and spending more. In addition, new travel patterns for US leisure travelers are emerging as consumers become more mindful and look for local experiences, authenticity and engagement with local communities.

The following sustainable tourism related trends were identified looking into the future (2020) at the ITB Berlin 2014 and are still relevant today.²⁶

Travel with a Personal Purpose

Where the cost of flying are less expensive, travelers are becoming more focused on their adventure 'bucket-list' of places to see in the world.

As flying overall becomes more expensive, "carbon guilt" sets in, the questions of how and why we travel will become more important. When people travel in the future, it will be with more of a purpose, with not only our own needs in mind, but also those of the destination.

Eco and sustainable travelers are moving towards the development of 'Deep Travel' - travel will be about getting "under the skin of a place". By 2020, the prediction is that travel will be about the appreciation of local distinctiveness, the idiosyncrasies and the detail, the things that make a place unique and special. It will be as much about the smell of fresh spices in Kerala in India and the colorful tailors of Hoi An in Vietnam as it is about rediscovering the exotic and locally distinctive closer to home - be it bluebells in an English wood or the taste of Wensleydale cheese.

Source Locally.

More hotels are beginning to source locally. This is showing up in certifications. By 2020, we'll also see the majority of hotels getting their produce, employees, materials, services and the like from sources within their immediate vicinity.

Green Discounts

Discounts will be offered for those visitors who keep their energy and water use below average.

Alternative Transport

Driven by the increased cost of flying, travel will begin to develop parallels with the slow-food movement. We'll gradually see an appreciation of 'slow travel', with journeys made by train, boat and bike gaining in popularity. People will gain a greater appreciation for the journey itself, as opposed to the restless striving for the next destination.

It is theorized that this change in mindset will be coupled with improvements in other forms of transport, making the whole experience more enjoyable. As part of this, it is likely we'll see carbon caps set for every airline and that an investment in rail travel - and a consequent reduction in cost - will be one of the direct beneficiaries of carbon trading. Planning rail travel will also be easier as timetables are designed to link up fast trains between countries and one global website is created through which to book them all.

Websites putting more emphasis on sustainable travel for hotels, airlines and other aspects of travel

Similar to the way that travelers now choose tour companies and hotels based on their responsible-tourism credentials, new websites will allow you to choose flights from the lowest-carbon airline for your particular

²⁶ Francis, J. (n.d.). Travel trends and predictions. From [Travel trends and predictions. Debate on the future of sustainable tourism; a vision for sustainable tourism in 2020.](#)

journey. Although there is a widespread belief within the industry that there isn't any alternative to kerosene aviation fuel, I think we will see airlines increasingly making use of environmentally friendly biofuels.

The Popularity of Costa Rica is Here to Stay²⁷

While the relative popularity of other ecotourism destinations wane and rise almost constantly, the popularity of Costa Rica as an ecotourism destination is here to stay. In a survey of ecotourism travel agents in 2014, a whopping 49% listed Costa Rica as the most popular holiday destination among their clients; to put the scale of this statistic into context, the next most popular destination of the survey was South Africa, with just 12% of the agents listing it as a requested destination.

Past Studies Informing Trends on Public Lands in the USA

Nature participation and interest have been documented as financially committed in previous years to the activity (Note: the dollar figures are 2006 inflation adjusted). Trends in nature-based participation match the specific data that the Forest Service reports for outdoor recreation generally.²⁸ The US Forest Service's survey entitled *Outdoor Recreation Trends and Futures* highlights ecotourism-types of activities and behaviors among Americans.²⁹ Published in March of 2012, this document can be used as a proxy to gauge trends in ecotourism behavior among American residents.

Relative to participation trends, the following appear relevant to ecotourism travel:

- The mix of outdoor activities that Americans engage in is different now than at any time in the past. The mix and availability of activities is much more dynamic and participation in traditional outdoor activities (the study cites hunting and fishing) are static or in decline³⁰.
- Growth is the second major trend in all forms of outdoor recreation - total number of people participating in the study's list of 60 activities grew by 7.5% from 2000 to 2009. Likewise, total activity days increased 32% (Cordell 2012, 1-2). Further much of this growth is driven by specifically nature-based activities within the outdoor recreation rubric. The growth in this specific area parallels the activity participation rate at 7.1% and activity days spent in nature-based activities exceed the more general number at nearly 40%. It is clear from this study that participation in nature-based activities is showing strong growth trends among Americans.
- Within nature based activities the study cites strong growth in activities that group around the concept of "viewing and photographing nature."
- The activity mix that individuals engage in differs by social segment – age, race, education, income, and urban/rural origin.
- The US's system of public lands is extremely important in being able to offer the activities that people engage in especially in nature-based activities. Interestingly, the report cites data from the Forest Service's own Fishing and Hunting survey that shows that in percentage terms hunters and fishers tend to use private land more readily than those engaging in nature-based activities.

²⁷ Retrieved October 12, 2014 from: <http://www.igluccruise.com/blog/2012/12/20/how-green-is-cruising>

²⁸ Ibid, page 2. Note: this survey used a strict definition of wildlife watching where it must have been the primary stated activity or special interest and not merely a casual happenstance (2).

²⁹ Cordell, H. K. (2012). *Outdoor recreation trends and futures: a technical document supporting the Forest Service 2010 RPA Assessment*. (General Technical Report SRS-150). Asheville, NC: United States Forest Service Southern Research Station.

³⁰ Ibid.

- Visits to lands administered by the NPS are relatively stable while visits to NWRs and USFWS lands have increased. Visits to BLM and FS land have been in decline. Visits to state parks have generally risen over the past 10 years, but have seen recent declines since 2009.
- Across all outdoor activities the need to “be away and to experience nature” seem to be important motivations.
- Consistent with other recent reports, this study projects that skiing (developed and backcountry), challenge activities, equestrian activities, and motorized water activities will grow in the next 50 years while visiting primitive areas, OHV use, hunting, fishing, and floating activities will decline.

The study also included a number of invited papers that detail trends in a number of areas as follows:

- Various studies of local wildlife festivals have generated data on their impacts and the trends show that they are growing in number and have varied impact on local, usually rural economies. With proper planning these can be a driver of economic growth from local and regional tourism. More data is needed here that is specific to the US to identify this particular trend.³¹
- The Latino/Hispanic demographic shift is changing outdoor recreation. This could be extrapolated to ecotourism behavior. For example, these groups tend to recreate in larger numbers away from urban areas and generally have less time for their activities (sometimes just one day off of work.)³²
- As demonstrated also in the Outdoor Foundation report for 2014, wildlife viewing and birdwatching are growing areas and this will have specific implications for ecotourism in the future³³.
- The US is very diverse in its activity offerings based on local geography and this also plays a role in what type of ecotourism activities are available at the local level. For example, nationally hunting and fishing are in decline, but remain strong in participation in the Southern and Mountain regions³⁴.

³¹ Ibid, pp. 56-58.

³² Ibid, p. 74.

³³ Ibid, p. 46.

³⁴ Ibid, pp. 24-59.