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The International Ecotourism Society

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Ecotourism Outlook 2013
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Ecotourism and Green Economy

What is Ecotourism? – The Essentials

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 exemplifies the benefits of responsible tourism development and management. The International Ecotourism Society (TIES) defines ecotourism as "*responsible travel to natural areas that conserves the environment and improves the well-being of local people*" (TIES, 1990). 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):

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

This does not mean that ecotourism can 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 2012-Being Green is “Still” Profitable

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

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

“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 2013, 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.

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.⁶ 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 follows⁷:

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.

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

⁶ Schendler, A. (2009). *Getting Green Done*. Perseus Books Group, Public Affairs, NY, NY.

⁷ UNEP, 2011, *Towards a Green Economy: Pathways to Sustainable Development and Poverty Eradication*, www.unep.org/greeneconomy

- 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.
- 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.

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.⁸ 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.⁹

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.

The GSTC has launched the baseline sustainable tourism criteria and indicators in six destination types and will continue this effort in up to 10 destinations to ensure the range of application. To date, six different destinations committed to the Early Adopter program are from all over the globe, including: Jackson Hole, WY; Lanzarote, Canary Islands; Botswana's Okavango Delta; Huangshan, China; Fjord Norway; St. Kitts and Nevis; Peru's Cuzco-Sacred Valley-Machu Picchu; Chile's Lakes District; South Sardinia, Italy; Naboisho Conservancy, Kenya; St Croix, Virgin Islands; Sierra Gorda, Mexico; and Riviera Maya, Mexico.

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.¹⁰

Ecotourism Participation Trends in the United States

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

⁸ Global Sustainable Tourism Council (2012). Destination Criteria. Retrieved September 2013, from GSTCouncil.org.

⁹ IBID.

¹⁰ University of Florida Crisis Tourism Crisis Management Institute (2013). Personal communication.

Although at present there is no direct data collected to summarize various trends in ecotourism in the United States¹¹, 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 Industry Association’s 2013 Outdoor Recreation Participation Report¹², which reports that participation in a range of nature-based outdoor activities increased, with 141.9 million participants age six and older engaged in outdoor recreation in 2012—the highest participation level in six years. Further, Americans were more active in 2012, taking an average of 87.4 outdoor outings per participant for a total of 12.4 billion outings overall.¹³

Among the most important trends in outdoor recreation participation in the U.S. is the growing support for non-consumptive and non-motorized activities. Over the past year, the biggest percentage increases in outdoor activities that were non-consumptive and non-motorized included: adventure racing (35.4%), telemark skiing downhill (23.3%), boardsailing/windsurfing (17.6%), kayaking (whitewater) (13.1%), kayaking (sea/touring) (12.1%), and recreational kayaking (10.1%). Among the top five favorite adult activities, bird watching, backpacking, and wildlife viewing remain strong. For youth, it appears running/jogging, and trail running, bicycling, skateboarding, bird watching, and surfing are the top five favorite outdoor activities. While this does not necessarily demonstrate ecotourism increases, it does indicate a ‘return to nature’ focus among travelers interested in non-consumptive and non-motorized (low-impact) nature-based activities.

Highlights from the USFWS’s 2006 survey indicate that 87.5million people engaged in wildlife-related recreation, including hunting, fishing, and wildlife viewing. Expenditures from these activities totaled \$122.3billion. Expenditures for sporting activities were estimated at 76.7billion and for wildlife viewing at \$45.7billion (USFWS 2006, 4). Overall, wildlife related recreation increased and was almost totally driven by wildlife viewing. Both hunting and fishing showed a decline of nearly 4 million participants from the 2000 survey. These results are in line with the more recent findings by the USFS. It appears non-consumptive wildlife activities are on the rise.¹⁴

For example, the number of individuals engaged in angling declined 15%, days spent angling declined 17% and expenditures on angling dropped 13% compared to 1996¹⁵; the number of individuals engaged in hunting declined 10%, days spent declined 14% and expenditures dropped 14% compared to 1996¹⁶; while the number of individuals engaging in wildlife watching increased 13% and the days away from home spent wildlife viewing increased 12% (but this was not a statistically significant increase according the report) and expenditures on these activities increased 21% compared to 1996.¹⁷ Further, as a nation, 38% of the US population participated in wildlife-

¹¹ 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)

¹² Outdoor Industry Association (2013). Outdoor Recreation Participation Report (2012). Outdoor Industry Foundation, Boulder, CO.

¹³ Ibid, p. 3.

¹⁴ U.S. Department of the Interior, Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. (2006). National survey of Fishing, hunting, and wildlife-associated recreation (FHW/06-NAT).

¹⁵ Ibid, page 27.

¹⁶ Ibid, page 40.

¹⁷ Ibid, page 58.

related activities, while 15% of the population participated in sporting activities (hunting and fishing) and 31% participated in wildlife viewing¹⁸.

It would appear, then, that there is an increase in wildlife watchers and that they are becoming more financially committed to the activity (Note: the dollar figures are 2006 inflation adjusted). As in previous recent years, the above trend matches the specific data that the Forest Service reports for outdoor recreation generally.¹⁹ The US Forest Service's survey entitled *Outdoor Recreation Trends and Futures* highlights ecotourism-types of activities and behaviors among Americans.²⁰ 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 decline²¹.
- 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.
- 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.

¹⁸ Ibid, page 50.

¹⁹ 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).

²⁰ 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.

²¹ Ibid.

- 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.²²
- 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.)²³
- Wildlife viewing and photography are growing areas and this will have specific implications for ecotourism in the future²⁴.
- 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 regions²⁵.

Youth and Ecotourism—No Change from 2012

In the area of outdoor participation among youth, after a sharp decline in participation from 2006 to 2008, have experienced an increase; overall participation has increased 1 percentage point over 2010. Since 2006, for the first time, outdoor recreation among young boys reversed its downward trend and added participants (6 to 12 years in age).²⁶ Participation among female teenagers (13 to 17 years in age) also grew, reaching the highest participation rate for females in the 2012 study. Although participation rates among youth ages 6 to 17 are up, average outings are down from 98 outings per participant in 2010 to 81 outings in 2011.²⁷ Interestingly, youth identified the primary reason for all ages not participating in outdoor recreation as “a lack of interest in the outdoors or lack of time.”²⁸

²² Ibid, pp. 56-58.

²³ Ibid, p. 74.

²⁴ Ibid, p. 46.

²⁵ Ibid, pp. 24-59.

²⁶ Outdoor Industry Association (2012, p. 32). Outdoor Recreation Participation Report (2012). Outdoor Industry Foundation, Boulder, CO.

²⁷ Ibid, p. 2.

²⁸ Outdoor Industry Association (2012). Outdoor Recreation Participation Report (2012). Outdoor Industry Foundation, Boulder, CO. (page 32).

As a result of the increasing concerns raised in Richard Louv’s “Last Child in the Woods,” there has been an increase in programs that are beginning to address these important trends. One example is an initiative by the California Roundtable on Recreation, Parks and Tourism created the [California Children’s Outdoor Bill of Rights](#) (COBR).²⁹ The updated its list in 2011, creating a focus on 10 outdoor activities that all children “should have a chance to experience between the ages of 4 and 14” (and beyond). The activities are designed to be simple and achievable with the goal of promoting outdoor recreation and a connection to nature and heritage. The COBR also serves as a catalyst to promote collaborations among organizations and agencies.

The 10 COBR activities include:

- | | |
|-------------------------|--------------------------|
| 1. Play in a safe place | 6. Camp under the stars |
| 2. Explore nature | 7. Ride a bike |
| 3. Learn to swim | 8. Go boating |
| 4. Go fishing | 9. Connect with the past |
| 5. Follow a trail | 10. Plant a seed |

Since the COBR, several other states and cities have adopted a similar initiative. And, other initiatives have included proposals by the Department of Interior to include \$70 million for youth programs. According to American Trails, the goal of the program is to “engage youth in nature and help them achieve an environmental awareness and respect for resources” (p. 17).³⁰ The initiatives include a range of activities, from environmental education programs to student career experience programs, to volunteer community service, and temporary employment programs.

National Park Visitation

According to the National Park Service,³¹ park visitation and backcountry use is up from previous years. When looking at current statistics for National Parks specifically, some parks have experienced substantial increased visitation, such as Yellowstone, Grand Canyon, Everglades, Acadia, Zion, Haleakala, Great Smokey Mountains, and Glacier-- while others have experienced a decrease in visitation, including Yosemite and Redwood NP. Overall, while park visitation is increasing in some areas, it would appear that given the current activity mix highlighted by the Outdoor Recreation Trends that participation in more traditional activities like camping are flat or declining.

Year	Recreation Visitors	Tent Campers	RV Campers	Backcountry Campers
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

²⁹ The California Children’s Outdoor Bill of Rights (COBR). Last retrieved on October 8, 2009, from <http://www.calroundtable.org/cobr.htm>

³⁰ American Trails (2009). Last retrieved on October 8, 2009, from: <http://www.myvirtualpaper.com/doc/americantrails/Sum09ATM/2009072301/17.html>

³¹ National Park Service Social Science Program, Public Use Statistics Office (2012). Visitor Data Summary. Last Retrieved October 10, 2013, from: Adapted from data retrieved on 10/20/2013 from: [https://irma.nps.gov/Stats/SSRSReports/National%20Reports/Annual%20Visitation%20Summary%20Report%20\(1979%20-%20Last%20Calendar%20Year\)](https://irma.nps.gov/Stats/SSRSReports/National%20Reports/Annual%20Visitation%20Summary%20Report%20(1979%20-%20Last%20Calendar%20Year))

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*

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

A Global Summary and Outlook

Overall, consumers of travel are demanding more individual and authentic travel experiences, which ecotourism can provide. Moving forward, travel and tourism experts agree, “Consumers will seek new and more authentic experiences...” and more interaction with local communities.³²

There is continued growth in adventure and experiential travel, blending physical adventure with wildlife and nature providing the features people seek.

Traveler Engagement

At the recent Ecotourism and Sustainable Tourism Conference (ESTC 2013) Nairobi, Kenya, presentations from the industry and academe identified ecotourism’s current trends. In summary, these included the following:

Technology-while experiencing and learning continue to be key factors in the ecotourism experience, travelers are employing technology as part of the experience, causing a slight debate. For example, the creation of mobile applications allows travelers to engage in “citizen science” – tracking, identifying, locating wildlife, which feeds into a national database and assists scientists with their research. Further, travelers can share their experiences immediately with the use of smart phones etc. which allow them to tweet, Facebook, share images of their experiences instantaneously—however, this development is also causing a bit of tension, and leading to the question of “to be or not to be...connected.” And the ecotourism enthusiasts seem somewhat split on the idea—with some moving into offering “digital detox” travel experiences.

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.³³

Experiencing and Learning

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

³² IKP International (2013). ITB World Travel Trends Report, p. 18. Retrieved September 20, 2013 from www.itb-berlin.com/library.

³³ Adventure Travel Trade Association (2013). Adventure Tourism Market Study 2013. Adventure Travel Trade Association and The George Washington University.

other...”³⁴ The ESTC 2013 in Nairobi, Kenya, 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).³⁵

³⁴ Ibid, page 14.

³⁵ National Travel & Tourism Strategy (2012). National Travel & Tourism Strategy: Task Force on Competiveness. Department of Commerce, Department of Interior. United States Government, p. 8.