

ECOTOURISM STATISTICAL FACT SHEET

General Tourism Statistics

Worldwide

The World Tourism Organization (WTO) estimates that there were more than 663 million international travelers in 1999. Spending by these tourists was estimated at more than US\$453 billion. Tourist arrivals are predicted to grow by an average 4.1% a year over the next two decades, surpassing a total of one billion international travelers by the year 2010 and reaching 1.6 billion by the year 2020 (WTO, 2000). Tourism is the world's largest employer, generating, directly and indirectly, nearly 200 million jobs or some 10% of the jobs globally (Honey and Rome, 2000).

The Ecotourism Market

Market Placement

Ecotourism is a nature based form of specialty travel defined by The International Ecotourism Society (TIES) as "responsible travel to natural areas which conserves the environment and sustains the well-being of local people." This definition has been widely accepted, but does not serve as a functional definition for gathering statistics. No global initiative presently exists for the gathering of ecotourism data. Ecotourism should be considered a specialty segment of the larger nature tourism market.

The Size of the Market

Ceballos-Lascuráin (1993) reports a WTO estimate that nature tourism generates 7% of all international travel expenditure (Lindberg, 1997). The World Resources Institute (1990) found that while tourism overall has been growing at an annual rate of 4%, nature travel is increasing at an annual rate between 10% and 30% (Reingold, 1993). Data which supports this growth rate is found in Lew's (1997) survey of tour operators in the Asia-Pacific region who have experienced annual growth rates of 10% to 25% in recent years (Lindberg, 1997). WTO (1998) stated that ecotourism and all nature-related forms of tourism account for approximately 20 percent of total international travel.

Fillion (1992) outlines the magnitude of the ecotourism market through the use of general tourism statistics. Fillion qualifies ecotourism as "travel to enjoy and appreciate nature". In the opinion of TIES this more closely represents nature tourism, and is identified as such on the table below. Fillion identified, through an analysis of inbound tourist motivations to different worldwide destinations, that 40-60% of all international tourists are nature tourists and that 20-40% are wildlife-related tourists. (Different multipliers were used in these figures.) Nature tourists can be defined as tourists visiting a destination to experience and enjoy nature, and wildlife-related visitors can be defined as tourists visiting a destination to observe wildlife (e.g. bird-watchers).

<i>Total International Tourism Arrivals</i>	<i>Nature Tourists</i>	<i>Wildlife-related Tourists</i>
1988 - 393 million	157-236 million	79-157 million
1994 - 528.4 million	211-317 million	106-211 million

<i>Total International Direct Economic Impact *</i>	<i>Nature Tourists</i>	<i>Wildlife-related Tourists</i>
1988 - US\$388 billion	US\$93-223 billion	US\$47-155 billion
1994 - US\$416 billion	US\$166-250 billion	US\$83-166 billion

* Total International Direct Economic Impact = money spent on travel by tourists traveling abroad.

Ecotourist Market Profile

Based on data collected by a survey completed by HLA and ARA consulting firms of North American travel consumers (1994), TIES has constructed the following ecotourist market profile.

Age:

35 - 54 years old, although age varied with activity and other factors such as cost.

Gender:

50% female and 50% male, although clear differences by activity were found.

Education:

82% were college graduates, a shift in interest in ecotourism from those who have high levels of education to those with less education was also found, indicating an expansion into mainstream markets.

Household composition:

No major differences were found between general tourists and experienced ecotourists.

Party composition**:

A majority (60%) of experienced ecotourism respondents stated they prefer to travel as a couple, with only 15% stating they preferred to travel with their families, and 13% preferring to travel alone.

Trip duration:

The largest group of experienced ecotourists (50%) preferred trips lasting 8-14 days.

Expenditure:

Experienced ecotourists were willing to spend more than general tourists, the largest group (26%) stating they were prepared to spend \$1,001-\$1,500 per trip.

Important elements of trip:

Experienced ecotourists top three responses were: (1) wilderness setting, (2) wildlife viewing, (3) hiking/trekking.

Motivations for taking next trip:

Experienced ecotourists top two responses were (1) enjoy scenery/nature, (2) new experiences/places.

** Experienced ecotourists = Tourists that had been on at least one "ecotourism" oriented trip. Ecotourism was defined in this study as nature/adventure/culture oriented travel.

Statistics for Ecotourism Destinations

USA

Domestic and international travelers made nearly 287 million recreation visits to the 378 recreation areas administered by the U.S. National Park Service (NPS) in 1998 compared to the 275 million visits in 1997 This is an increase of 4.4% (Travel Industry Association of America, 2000).

Travel to the *United States* National Parks Service areas generated direct and indirect economic impact for local communities of US\$14.2 billion and supported almost 300,000 tourist-related jobs during 1996. It is unknown what portion of these visitors represented participation in ecotourism activities (Tourism Works for America, 1997).

Nepal

The Annapurna area is the most popular trekking destination in Nepal. Since 1989 the number of trekkers coming to the area has increased at an annual rate of approximately 18%. In 1997, 50,708 international trekkers visited the area. Out these 12,000 visited the Annapurna sanctuary (Gurung, no date).

Belize

In 1999 49.4% of 172,292 tourists to Belize visited Mayan sites, 12.8% visited Parks and reserves. Important reasons for visiting Belize are: to observe scenic beauty, to be in a natural setting and to observe wildlife (Higgins, 2000). Cayes and Barrier reefs were visited by 87% of visitors. 82% of visitors to Belize were in the age group of 18 to 50 years old and 65% were college graduates (Higgins, 2000)

Galapagos Islands

Galapagos nature tourism has grown steadily since the pioneering days of the 1970's, to the present level of over 60,000 visitors a year, making a \$100 million-plus contribution to the Ecuadorian economy (estimates vary) (Charles Darwin Research Station, 2001)

Kenya

From 1983 to 1993 visitor arrivals to *Kenya* grew by 45% (372,000 to 826,000). The Kenya Wildlife Service (1995) estimates that 80% of Kenya's tourist market is drawn by wildlife and that the tourism industry generates

one-third of the country's foreign exchange earnings. Revenue from Kenya's wildlife parks increased to Ksh. 711 million in 1995. (In 1997 US\$1=60KS).

Australia

There are an estimated 600 ecotourism operators in Australia today, approximately 85% of these employ fewer than 20 staff. Ecotourism businesses are estimated to have an annual turnover of some \$250 million and to employ a total staff of around 6500, the equivalent of 4500 full-time staff (Sport and Tourism Division Australian government, 1999).

There has been a considerable increase of international visitors to Australia's national parks, with a rise in visitor numbers between 1993 and 1996 from around 1.2 million to more than 1.6 million, an increase of 33.3 per cent. By 1998, this figure had increased to nearly 1.7 million, or 47% of all inbound visitors to Australia aged 15 and over reported having visited national parks (Bureau of Tourism Research, cited by Sport and Tourism Division Australian government, 1999).

In Australia, recent research found ecotourists to represent nearly 30% of domestic travellers (ecotrends 1999, cited by Wight, in press)

Peru

An estimated 10.3% of tourists that visit Peru prefer to go birdwatching in natural areas (Proyecto PRA, 2000). According to studies carried out by PromPerú (2000) 47% of foreign tourists to Peru visited natural zones. Of this number, 44% combined visiting natural zones with visiting cultural attractions and 3% came only to visit natural zones. The flow of visitors to 26 of the 52 Áreas Naturales Protegidas por el Estado - ANPE (Protected Natural Zones by the State), increased 250% during the 1990-1999 period. Just in 1999, the number of visitors was estimated in 642 336, according to the figures provided by the Instituto Nacional de Recursos Naturales - INRENA (National Institute of Natural Resources) (Promperú, 2000).

Brazil

Five million visitors came to Brazil in 1999, five times as many as in 1991. Brazil has more than 150 conservation areas, of which 40 National Parks. An estimated number of 3.5 million visitors went to these National Parks in 1998. Especially the last two years the number of foreign ecotourists has grown, it had 600,000 Brazilian ecotourists and attracted 200,000 foreign ecotourists in 1998 (Janér, 2000).

South Africa

In the period of 1986 until 1998 the number of visitors to game and nature reserves in South Africa has grown by 108% annually. In 1986 the number of visitors to the reserves was 454,428, in 1998 this number has grown to 5,898,000 visitors. Game and nature reserves are the number one activity for visitors to the country in 1997 (60%), rising by 2% over the previous year (South African Tourism Board, 1998).

UK

Research conducted by MORI for ABTA indicated that 85% of UK holidaymakers believed that it is important not to damage the environment, 77% think that it is important that their visits include experience of local culture and food and 71% feel that tourism should benefit the people of the destination visited, through jobs and business opportunities. 52% said they would be interested in finding out more about local issues (environmental and social) in their chosen resort before they booked their holiday. The majority (64%) stated that they would be prepared to pay between £10 and £25 extra for environmental, social or charity guarantees- representing a 2-5% increase on a holiday of £500.

Statistical Contact Information

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