

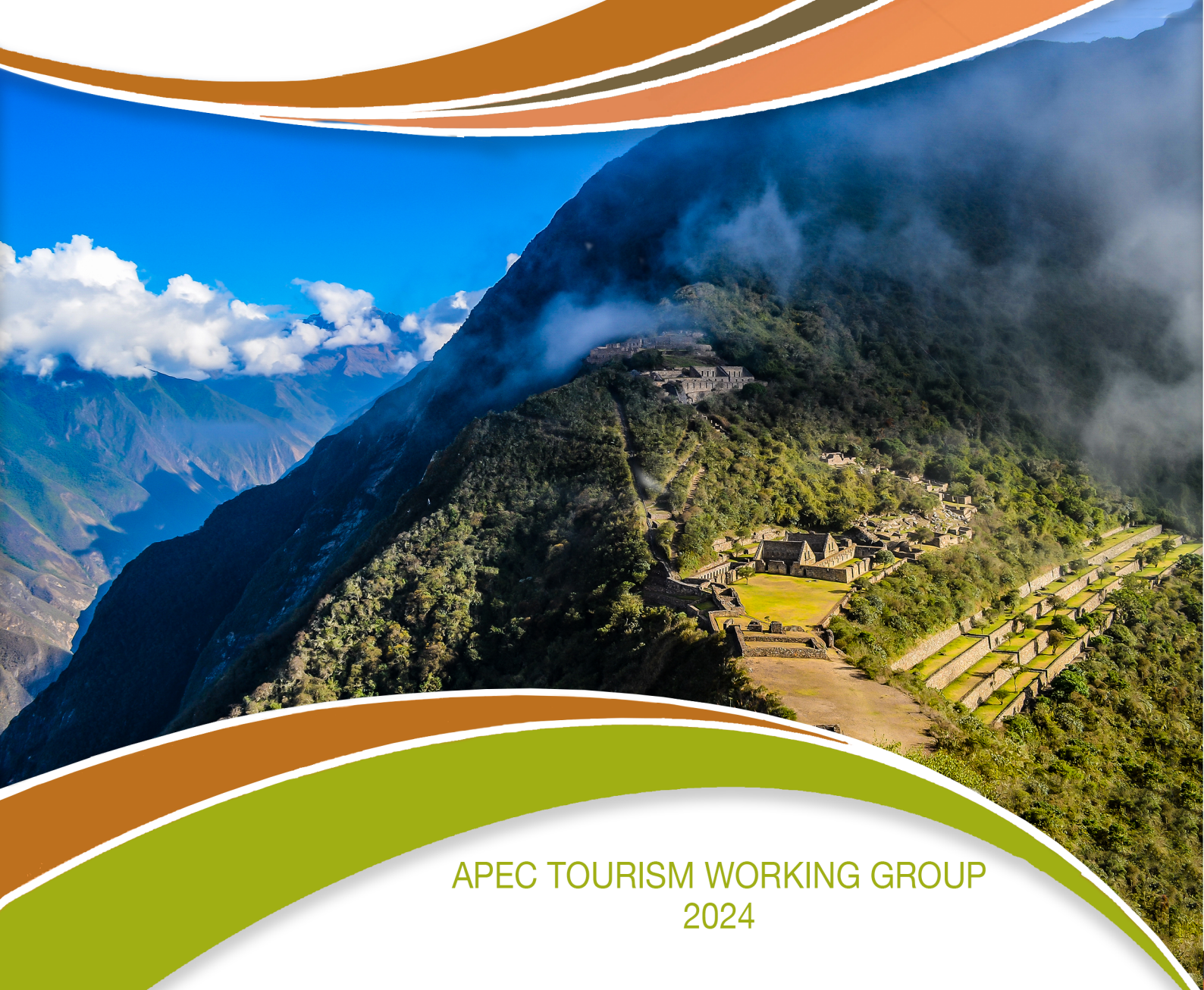


Asia-Pacific  
Economic Cooperation



**APEC PERU**  
2024

# REPORT NATURE-BASED TOURISM AND ADVENTURE TOURISM IN THE APEC ECONOMIES



APEC TOURISM WORKING GROUP  
2024







**Asia-Pacific  
Economic Cooperation**



# **REPORT NATURE-BASED TOURISM AND ADVENTURE TOURISM IN THE APEC ECONOMIES**

**APEC TOURISM WORKING GROUP**

**July 2024**

APEC Project: TWG 01 2024S “Report on the main adventure and nature tourism experiences and products in APEC economies”

Produced by:

Vice Ministry of Tourism of Ministry of Foreign Trade and Tourism of Peru (MINCETUR)

With the support from:

San Ignacio de Loyola University (USIL), Peru



For:

Asia-Pacific Economic Cooperation Secretariat

35 Heng Mui Keng Terrace

Singapore 119616

Tel: (65) 68919 600

Fax: (65) 68919 690

Email: [info@apec.org](mailto:info@apec.org)

Website: [www.apec.org](http://www.apec.org)


Cover picture

Parque Arqueológico de Choquequirao

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*The terms ‘national’, ‘nation’, ‘country’,  
or ‘state’ used in the text are for the purposes of this report  
and do not imply the political status of any APEC member  
economy*



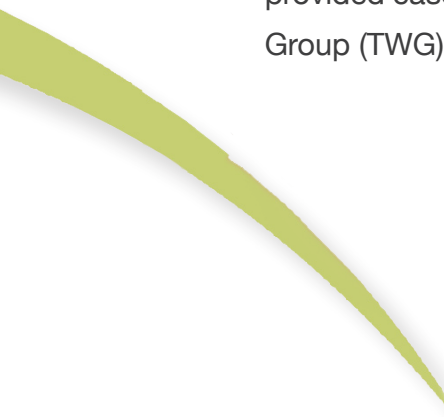
## Preface

The tourism sector has demonstrated remarkable resilience in the face of the pandemic. According to the UNWTO (2024), international tourism has already recovered 88% of its pre-pandemic levels in 2023 and is expected to fully recover in 2024. The Asia-Pacific region has reached 65% of its pre-pandemic levels, while the Americas have reached 90%.

This scenario presents a significant opportunity for tourist destinations in the APEC region to enhance their competitiveness by diversifying their tourism activities to positively impact their local communities. The nature-based tourism and adventure tourism sectors are emerging markets for different economies. In light of this, through this report, the APEC Tourism Working Group has proposed to support Driver 3 of the APEC's Putrajaya Vision 2040, namely, Strong, Balanced, Secure, Sustainable, and Inclusive Growth. This report is designed to assist in planning, developing, and managing sustainable tourism products that will encourage economic growth and regional cooperation.

The objective of this report is to examine the potential of nature and adventure tourism in APEC economies and provide valuable information that will assist in strengthening the sector's development. The sharing of experiences and best practices between economies can facilitate the achievement of this goal.

This document was made possible thanks to the generous support of Australia; Hong Kong, China; Malaysia; New Zealand; Peru; and the United States, which provided case studies. We would also like to thank the APEC Tourism Working Group (TWG) for managing the production of this report.











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# Abbreviations and Acronyms

ATTA Adventure Travel Trade Association

FY Financial year

GDP Gross Domestic Product

NBT Nature-based tourism

NPS National Park Service (The United States)

PA Protected Area

SMEs Small and medium-sized enterprises

SDG United Nations Sustainable Development Goals

T&T Travel and Tourism industry

TWG The APEC Tourism Working Group

UNESCO United Nations Educational, Scientific and Cultural Organization

UNWTO United Nations World Tourism Organization

VFR Visiting friends or relatives.

VR Virtual







Castle Rock, Porongurup National Park  
© Tourism Australia



## 1. Introduction

The tourism industry plays a significant role in the global economy. Despite the challenges posed by border closures due to the pandemic, the tourism sector is estimated to contribute USD 3.3 trillion to the world's GDP in 2023.

However, the aftermath of the global pandemic has left many economies with a weak economic environment, posing complications for tourism growth. In a positive outlook, the United Nations Tourism Panel of Experts has projected an improvement in the global tourism sector, as detailed in the World Tourism Barometer publication. (UNWTO, 2024)

Given the above information, it is reasonable to assume that tourism is an ever-growing sector that can recover from the global crisis and still make significant numbers, which will continue to add to the global economy. One of the reasons the industry has been able to thrive despite its challenges is its interdisciplinary and interconnected nature.

Globally, the tourism industry has had to adapt to a number of different trends that have emerged over time. A review of ATTA's 2023 trends revealed that green and sustainable trips and highly involved physical activity (trekking, hiking, etc.) have emerged as significant post-pandemic tourist trends. In summary, nature-based tourism (NBT) and adventure tourism have become two of the most promising tourism types. (ATTA, 2023)

Furthermore, it is important to note that the Sustainable Development Goals (SDGs) currently strongly influence our sector. One of the main objectives of tourism is to contribute to achieving these goals by 2030 by promoting responsible and sustainable tourism practices.

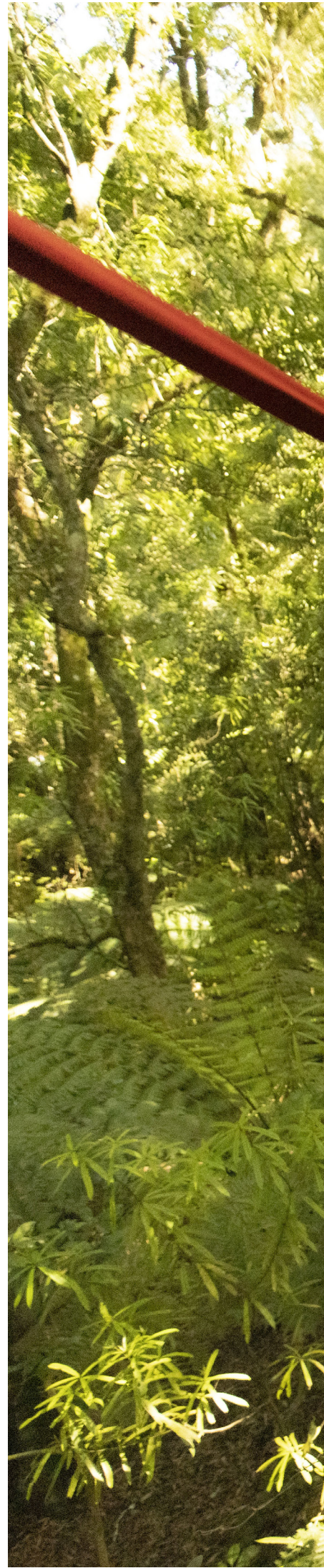
If managed correctly, NBT growth can be crucial in sustainable development, benefiting all stakeholders (tourists, providers, the destination, etc.). Concurrently, adventure tourism can effectively promote bio-cultural offerings while being profitable.



Notably, NBT represents approximately 20% of the tourism sector and market. Furthermore, adventure tourism is anticipated to grow to a value of up to USD 1+ trillion by 2030, with an estimated growth rate of 15.2% from 2022 to 2030. (Grand View Research, 2022)

More specifically, the growth of nature-based and adventure tourism in different types of natural landscapes and with enormous biodiversity within Asia-Pacific economies has significantly impacted the tourism sector. Additionally, these economies have been addressing challenges such as maintaining appropriate preservation practices while managing tourism transit through the destination's sites, controlling over-tourism in areas where the carrying capacity will not allow it before it damages the environment, and still generating benefits for the local communities involved and the tourism providers.

In this sense, this report analyses how different APEC economies have dealt with the development of nature-based and adventure tourism. It considers the current context, background, and prospects of this sector. It presents case studies of Australia; Hong Kong, China; Malaysia; New Zealand; Peru; and the United States. These case studies aim to guide joint efforts to enhance the further development of these two important types of tourism worldwide while encouraging responsible tourism practices towards a more sustainable sector overall.







Rotorua Zipline, Rotorua  
© Graeme Murray / Tourism New Zealand's Visual Library



## 2. Methodology

### 2.1. Approach and Objective

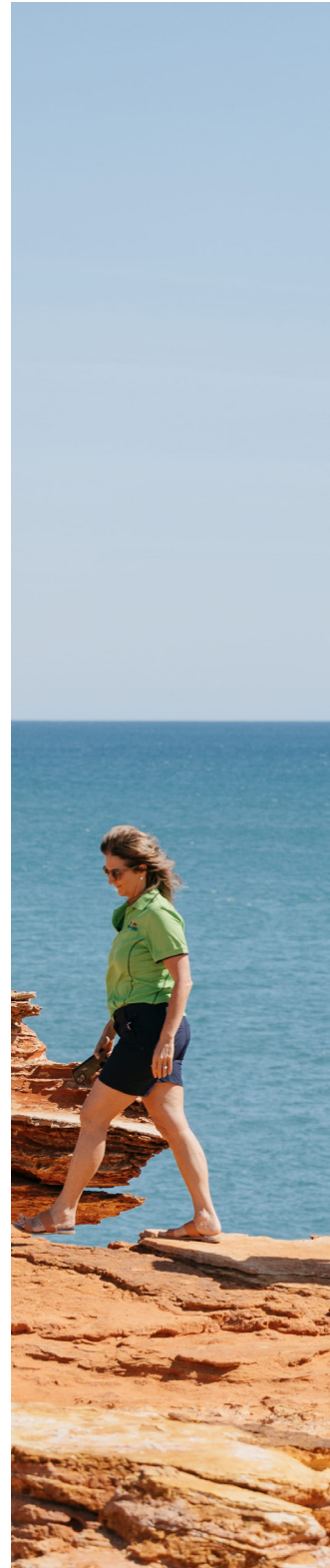
This report was compiled using a qualitative approach to provide a comprehensive overview of the current state of nature-based and adventure tourism in the APEC region. The report aims to clarify the sector's potential and limitations, offering valuable analytical insights.

### 2.2. Data Collection

The information included in this report has been collected through a form developed in Annex 1. All participants were encouraged to provide answers based on official data and documents related to the development of nature-based and adventure tourism in their economies. The data collection process took place between March and April 2024.

### 2.3. Case studies

This report presents six case studies on the economies of Australia; Hong Kong, China; Malaysia; New Zealand; Peru; and the United States. The participating economies have agreed to participate in this project and submitted their responses.





Gantheaume Point, Broome  
© Tourism Australia







## 3. Travel & Tourism sector in the APEC Economies

This chapter provides an overview of the performance of the Travel and Tourism (T&T) industry in the APEC economies included in this report. To understand the context of nature-based tourism development, it is essential to know the main indicators of the tourism sector in each economy. The indicators include the contribution of the T&T sector to the Gross Domestic Product (GDP), the number of international tourist arrivals, inbound tourism expenditure, domestic trips, domestic tourism expenditure, and employment in the tourism sector.

### 3.1. Contribution of T&T to the GDP

Tourism represents a significant proportion of GDP for many economies. However, this sector has declined following the closure of borders during the pandemic. Fortunately, these numbers showed recovery towards 2022 and 2023, with hopes of continuing to increase and surpassing pre-pandemic levels.

**Table 1:**  
**Contribution of travel and tourism to the GDP of the participating APEC economies (2019-2023)**

Economy	2019*	2020	2021	2022	2023 P/
Australia	3.1%	2.4%	1.4%	1.5%	2.5%
Hong Kong, China	3.6%	0.40%	0.10%	0.40%	N.A.
Malaysia	15.9%	14.1%	12.8%	14.0%	N.A.
New Zealand	5.6%	5.4%	3.4%	3.1%	3.7%
Peru	3.9%	1.5%	1.7%	2.3%	2.5%
The United States	3.0%	1.5%	2.2%	N.A.	N.A.

*N.A.: Not available information*

*\* Values for Australia are by financial year. E.g. 2019 represents FY2018-2019.*

*Source: APEC economies*



While economies like Australia; New Zealand; Peru; and the USA averaged 4% with pre-pandemic numbers, Hong Kong, China tourism activity dropped significantly. In contrast, Malaysia's tourism activity (including retail trade, food and beverage services, etc.) contributed more significantly to the economy's GDP, with over 15%. This figure only dropped to over 12% mid-pandemic, which is still above average for participants who have already recovered from the global crisis.

### 3.2. International tourist arrivals

In line with the observed trajectory in GDP figures, all economies reached a peak in numbers by 2019. However, the following years witnessed a significant decline, with most participants experiencing a loss of over 70% of their international tourist arrivals in 2020 and reaching their lowest number in 2021.

**Table 2:**  
**International tourist arrivals (in million) of the participating APEC economies (2019-2023)**

<b>Economy</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023 P/</b>
<b>Australia</b>	9.5 M	1.8 M	0.2 M	3.7 M	7.2 M
<b>Hong Kong, China</b>	55.9 M	3.6 M	91.4 K	604.6 K	34.0 M
<b>Malaysia</b>	26.1 M	4.3 M	0.1 M	10.0 M	20.1 M
<b>New Zealand</b>	3.8 M	0.9 M	0.2 M	1.4 M	2.9 M
<b>Peru</b>	4.3 M	0.8 M	0.4 M	2.0 M	2.5 M
<b>The United States</b>	79.4 M	19.2 M	22.2 M	50.8 M	N.A.
<i>N.A: Not available information</i> <i>Source: APEC economies</i>					

Regarding proportional decline, Hong Kong, China suffered the greatest reduction in numbers between 2021 and 2022, followed by Malaysia; Australia; and New Zealand. Following the implementation of travel restrictions in previous years, all participants except Hong Kong, China, had recovered by 2022, reaching the one million mark again and continuing to grow. Their aim is to exceed the peak numbers seen in 2019.

### 3.3. Inbound tourism expenditure

In line with the prevailing trend, the advent of the COVID-19 pandemic will continue to result in a decline in most indicators, including inbound tourism expenditure.

**Table 3:**  
**Inbound tourism expenditure of the participating**  
**APEC economies, in USD (2019-2023)**

Economy	2019	2020	2021	2022	2023 P/
Australia	20.6 B	5.1 B	0.9 B	8.3 B	16.8 B
Hong Kong, China	32.8 B	N.A.	N.A.	N.A.	22.9 B
Malaysia	18.1 B	2.6 B	0.5 B	5.9 B	14.9 B
New Zealand	10.2 B	10.5 B	0.8 B	1.1 B	6.5 B
Peru	4.7 B	1.0 B	1.0 B	2.9 B	3.3 B
The United States	239.0 B	84.2 B	84.1 B	165.4 B	N.A.
N.A: Not available information Source: APEC economies					

As anticipated, following a strong performance in 2019, all participating economies experienced a significant decline in inbound tourism expenditure in 2021. However, there was a notable recovery in 2023, with the sector continuing to grow.



### 3.4. Domestic trip

The analysis highlights the importance of domestic travel patterns as a key metric in the tourism sector. Despite a decline caused by the pandemic, they remain a key indicator of tourism's enduring relevance to the broader economic landscape.

**Table 4:**  
**Domestic trips of the participating APEC economies (2019-2023)**

Economy	2019	2020	2021	2022	2023 P/
Australia	365.8 M	236.7 M	242.5 M	309.6 M	333.8 M
Hong Kong, China	N.A.	N.A.	N.A.	N.A.	N.A.
Malaysia	332.4 M	147.0 M	72.4 M	207.8 M	N.A.
New Zealand	N.A.	N.A.	N.A.	22 M	27 M
Peru	48.5 M	14.3 M	16.4 M	27.1 M	37.1 M
The United States	2.3 B	1.6 B	N.A.	2.2 B	N.A.
<i>N.A: Not available information</i> <i>Source: APEC economies</i>					

It should be noted that this indicator may be measured differently for participant economies. This may indicate that some economies categorise domestic travel in terms of day trips and overnight trips, as is the case in Australia, while others categorise the indicator according to the type of domestic travel, such as leisure or business, as indicated by the USA.

Nevertheless, these classifications do not impede the analysis of the information, given that the pandemic has demonstrated that these numbers are equally susceptible to the same force action. The figures significantly decreased in 2021, representing one of this indicator's most significant historical drops. However, there was a notable recovery in 2022.

### 3.5. Domestic tourism expenditure

The centrality of domestically generated tourism income lies in its immediate territorial impact. Despite the challenges posed by the pandemic, the recovery of this metric has outpaced that of inbound tourism expenditure. This highlights the intrinsic value of the domestic tourism market and its capability to play a pivotal role in the economic recovery of local communities in the wake of crises.

**Table 5:**  
**Domestic tourism expenditure of the participating APEC economies,**  
**in USD (2019-2023)**

<b>Economy</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023 P/</b>
<b>Australia</b>	70.3 B	41.4 B	51.9 B	85.6 B	93.5 B
<b>Hong Kong, China</b>	N.A.	N.A.	N.A.	N.A.	N.A.
<b>Malaysia</b>	21.6 B	8.4 B	3.7 B	13.4 B	14.9 B
<b>New Zealand</b>	14.2 B	14.2 B	14.9 B	15.0 B	16.0 B
<b>Peru</b>	5.9 B	1.4 B	2.1 B	3.6 B	4.9 B
<b>The United States</b>	N.A	N.A	N.A	N.A	N.A
<i>N.A.: Not available information</i> <i>Source: APEC economies</i>					

This indicator shows that most participating economies exhibited a similar trend to those previously highlighted. However, it is noteworthy that Australia, while still experiencing a decline in domestic tourism expenditure in 2020, has already begun to recover and has surpassed its pre-pandemic levels in 2022. In contrast, other economies have continued to decrease their domestic tourism expenditure, with a rebound only occurring in 2023. They are currently attempting to match the levels achieved in 2019.

### 3.6. Employment in the tourism sector

Tourism significantly contributes to an economy's employment landscape, benefiting a wide range of sectors, including passenger transport, food and beverage services, visitor accommodation, travel agencies, and handicrafts.

**Table 6:**  
**Employment in the tourism sector of the participating APEC economies**  
**(2019-2023)**

<b>Economy</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023 P/</b>
<b>Australia</b>	0.75 M	0.40 M	0.42 M	0.64 M	0.65 M
<b>Hong Kong, China</b>	232.7 K	49.0 K	22.5 K	29.6 K	N.A.
<b>Malaysia</b>	3.56 M	3.45 M	3.52 M	3.60 M	N.A.
<b>New Zealand</b>	0.37 M	0.36 M	0.24 M	0.21 M	0.31 M
<b>Peru</b>	1.4 M	0.69 M	0.83 M	1.0 M	1.15 M
<b>The United States</b>	9.9 M	5.5 M	7.4 M	N.A.	N.A.
<i>N.A: Not available information</i> <i>Source: APEC economies</i>					

The labour force for most participating economies experienced a significant decline in 2020. However, there was a positive recovery in 2021, with the labour force continuing to grow in the following years. Although, New Zealand's performance on this indicator differs from the overall trend. After a gradual decline until 2022, the country's labour force grew again in 2023.





Kayak en Llachón, Lago Titicaca  
© Fernando López / PROMPERÚ









## 4. Nature-Based Tourism and Adventure Tourism - Representative Cases

### 4.1. Australia

#### a. Background

Australia is internationally renowned for its pristine natural environments and protected areas, with nature-based tourism emerging as a significant market segment for Australian tourism. Visitors' participation in nature-based tourism activities has grown by an average of 9% from 2014 to 2019, accompanied by a 10% yearly increase in visitor expenditure during the same period. As consumer interest in nature-based experiences continues to surge, Australia is well-placed to capitalise on this growing demand while implementing nature protection measures to ensure the industry's long-term sustainability.

#### b. Main Policies and Regulations

The Australian Trade and Investment Commission (Austrade) is the federal government agency responsible for tourism policy, programs, and research. Tourism Australia is the government agency responsible for attracting international visitors to the economy. Moreover, all state and territory governments in Australia incorporate tourism into their portfolios, and state and territory tourism organisations (STOs) are committed to attracting visitors to their respective jurisdictions.

THRIVE 2030 is Australia's long-term strategy for sustainable visitor economy growth. The strategy is focused on seven priority areas and includes 66 actions for governments and the tourism sector. This includes actions that support the growth of nature-based tourism, for example, through the development of high-quality products and experiences, including First



Nations experiences, and the development of public infrastructure in national parks and World Heritage Areas.

The Australian Government through the Nature Positive Plan is reforming its environmental legislation on three basic principles of clear domestic standards of environmental protection, improving and speeding up decisions, and building trust and integrity. This will impact future investment and development of tourism infrastructure and products, including domestic parks and protected areas.

Furthermore, each of Australia's eight State and Territory Governments has its own visitor economy strategy, with many prioritising the development of nature-based tourism. For instance, Victoria's Experience Victoria 2033 strategy identifies nature-based tourism as a key priority to driving growth. Other state government entities have also developed strategies for developing nature-based tourism products, including Queensland's Ecotourism Plan for Queensland's Protected Areas 2023-2028.



### **c. Demand**

#### Visitor profile

The average international traveller to Australia who participated in nature-based activities from 2016 to 2019 was:

- ▶ The gender split was 55% female and 45% male.
- ▶ The typical traveller is younger, with 24% aged between 25 and 34. A further 16% were aged between 15 and 24, 16% between 35 and 44, and 16% between 45 and 54. A total of 71% of respondents were aged under 55. Nearly one-quarter were between 55 and 69, while 5% were aged 70 or above.
- ▶ The majority of travellers were single (46%), followed by couples (24%).

In comparison to the total number of international visitors to Australia between 2016 and 2019, the following travellers were, on average, slightly more likely to engage in nature-based tourism activities during their trip:

- ▶ Females.
- ▶ Travellers aged between 15 and 24 and 25 to 34 were more likely to engage in nature-based tourism activities than those aged 60 to 70.

The largest number of international travellers participating in nature-based tourism activities between 2016 and 2019 were from China (17%), New Zealand (9%), the United Kingdom (9%), the United States (9%) and Japan (6%). These were also Australia's largest overall inbound markets. When compared to the total number of travellers from those economies, travellers from the following economies were, on average, slightly more likely to engage in nature-based tourism activities during their trip to Australia:

- |                     |                  |
|---------------------|------------------|
| ◇ Republic of Korea | ◇ Scandinavia    |
| ◇ Germany           | ◇ France         |
| ◇ Netherlands       | ◇ Chinese Taipei |
| ◇ Switzerland       |                  |



The average domestic overnight traveller who participated in nature-based activities from 2016 to 2019 was:

- ▶ The gender split was 53% female and 47% male.
- ▶ The typical customer is younger, with 71% aged under 55. The largest age groups were 25-34 (20%) and 35-44 (20%), followed by 45-54 (17%) and 15-24 (14%). A further 15% of respondents were aged 55-64, while 14% were over 65. (This is a slightly older average than for international travellers)
- ▶ The majority of domestic overnight trips are taken by adult couples (29%), followed by friends/relatives travelling together (28%) and family groups (24%), and 16% of NBT domestic overnight trips were made by individuals travelling alone.

Female travellers and those aged between 25 and 44 were more likely to participate in NBT as part of their trip, on average, between 2016 and 2019, compared to other groups. The least likely group to participate in NBT were travellers aged over 70. However, travellers over 45 overall had a lower participation rate in NBT than those under 45.

The average domestic day trip traveller who participated in nature-based activities from 2016 to 2019 was:

- ▶ The gender split was 50% female and 50% male.
- ▶ The typical traveller was younger, with 75% aged under 55. The largest age groups were 25-34 (24%) and 35-44 (21%), followed by 15-24 (16%) and 45-54 (15%). A further 12% of respondents were aged 55-64, while 13% were over 65. This is a younger average than domestic overnight trips and international travellers.

The results showed no significant difference between the participation rates of male and female domestic day trippers in NBT. However, younger day trippers were more likely to participate, with those under 45, particularly those aged 25-34, being the most likely to do so.

### Motivation

The majority of international visitors who participated in nature-based tourism between 2016 and 2019 cited holidays as the primary reason for their visit (67%), with visiting friends or relatives (VFR) coming in second at 39%. International holiday travellers were the most likely to participate in NBT.

The majority of domestic overnight visitors who participated in nature-based tourism between 2016 and 2019 cited holidays as the primary reason for their visit (65%), with visiting friends or relatives (VFR) coming in second at 27%. A greater proportion of domestic day trip visitors who participated in nature-based tourism in 2016-2019 reported that their visit was for a holiday (77%).

In terms of international travellers, domestic holiday travellers were, on average, significantly more likely to participate in NBT between 2016 and 2019 than travellers for other purposes.

Overall, international travellers were significantly more likely to engage in NBT on their trip than domestic travellers.

### Type of trip

The most popular NBT activities for international travellers as determined by data from the International Visitor Survey (IVS) from January to September of years 2018, 2019, and 2023 are as follows:

- ▶ Visit domestic parks/state parks (67% of international NBT travellers).
- ▶ Visit botanical or other public gardens (59% of international NBT travellers).
- ▶ Visit wildlife parks/zoos/aquariums (50% of international NBT travellers).
- ▶ Bushwalking/rainforest walks (34% of international NBT travellers).
- ▶ Whale or dolphin watching (12% of international NBT travellers).

The most popular NBT activities for domestic overnight travellers as determined by data from the National Visitor Survey (NVS) from January to September of years 2018, 2019, 2022, and 2023 are as follows:

- ▶ Bushwalking/rainforest walks (56% of domestic overnight NBT travellers)
- ▶ Visit domestic parks/state parks (51% of domestic overnight NBT travellers)
- ▶ Visit botanical or other public gardens (20% of domestic overnight NBT travellers)
- ▶ Visit wildlife parks/zoos/aquariums (10% of domestic overnight NBT travellers)

The most popular NBT activities for domestic day trip travellers as determined by data from the National Visitor Survey (NVS) from January to September of years 2018, 2019, 2022, and 2023 are:

- ▶ Visit domestic parks/state parks (49% of domestic day trip NBT travellers).
- ▶ Bushwalking/rainforest walks (47% of domestic day trip NBT travellers).
- ▶ Visit botanical or other public gardens (22% of domestic day trip NBT travellers).
- ▶ Visit wildlife parks/zoos/aquariums (7% of domestic day trip NBT travellers).

#### Average expenditure per trip

The average expenditure per trip that includes an NBT activity (based on data for January to September 2023) is as follows:

- ▶ USD 78 for an international trip
- ▶ USD 215 for a domestic overnight trip (which is higher than the comparable average for all activities – i.e., not just nature-based activities – which was USD 174 per night)
- ▶ USD 94 per day trip

The average spend per night for international and domestic day trips with NBT activities was similar to that for trips without NBT activities.



### Spend on nature-based trips

The expenditure on nature-based trips in Australia has shown an upward trend, with an increasing number of trips taken until 2019. Despite the challenges posed by the pandemic, the average spending per night for domestic overnight trips continued to show growth.

**Table 7:**  
**Expenditure and average spend on nature-based trips (USD)**

	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023 (9months Jan Sep)</b>
<b>Expenditure (USD thousands of million)</b>							
International	20,200	21,200	21,900	N.A.	N.A.	N.A.	N.A
Domestic overnight	13,000	14,700	16,700	10,600	16,000	25,200	N.A
Domestic day	1,500	1,900	2,300	1,300	1,500	2,200	N.A
<b>Average spend per night/day (USD)</b>							
International	96	100	103	N.A.	N.A.	N.A.	78
Domestic overnight	120	128	128	121	137	175	215
Domestic day	62	65	68	63	69	84	94
<i>Source: Tourism Research Australia, International Visitor Survey and National Visitor Survey data</i>							

### **d. Main Tourism Products**

#### Popular regions visited

On average in 2016-2019:

- ▶ The majority of international NBT visitors (55%) chose to visit New South Wales. Of these, 51% visited Sydney's state capital, while 12% opted for a regional NSW destination.
- ▶ The states of Queensland (38%) and Victoria (37%) received the second and third-largest numbers of international NBT visitors, respectively. Within these, 36% visited the state capital of Melbourne, and 8% visited regional Victoria. There was more dispersal in Queensland, as 19% visited the state capital of Brisbane, 15% visited the Gold Coast, and 20% visited regional Queensland.

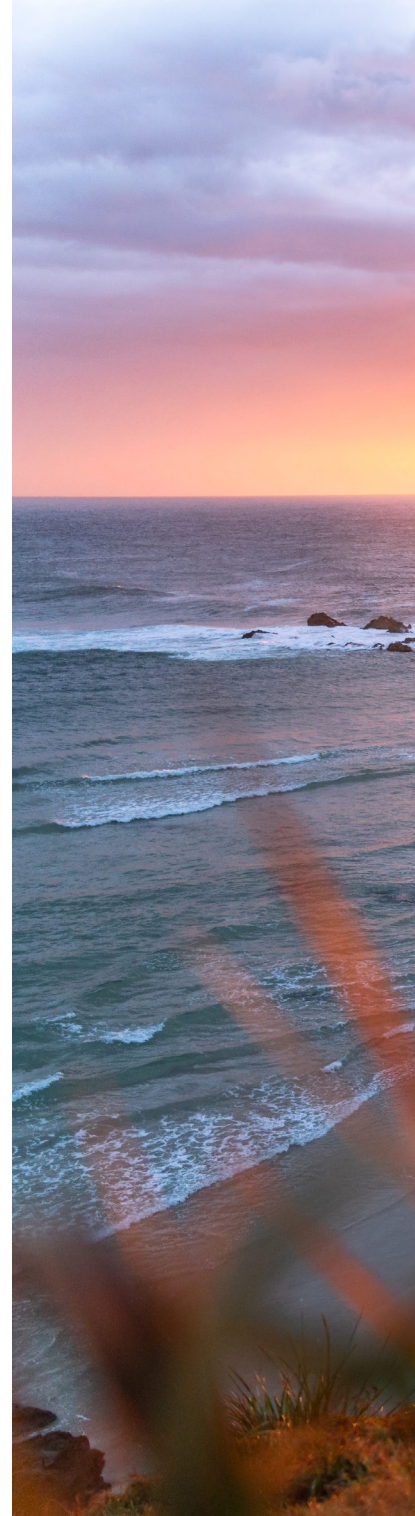
- ▶ International travellers to the Northern Territory (NT) were the most likely to engage in NBT activities, followed by travellers to Tasmania, South Australia, and Queensland. Travellers to Victoria were the least likely to engage in NBT activities.
- ▶ International travellers to regional areas were more likely to engage in NBT activities than travellers to capitals.

A similar pattern was observed in the case of domestic NBT travellers. For the period 2016-2019, the following data was observed for domestic overnight travellers:

- ▶ The largest share of domestic overnight NBT travellers was received by NSW (32%), followed by Victoria (24%) and Queensland (21%). However, these shares are largely reflective of the overall travel shares. In comparison to other travellers who did not participate in NBT, travellers to the NT and Tasmania were most likely to engage in NBT activities.
- ▶ Domestic overnight travellers to regional areas were more likely to engage in NBT activities than travellers to capitals.

#### **e. Lessons learned and challenges**

- ▶ The development of nature-based tourism in Australia requires collaboration between industry and all levels of government.
- ▶ It is crucial to maintain a balanced approach to protecting the environment, wildlife, and cultural heritage while ensuring the sustainability of the tourism industry into the future and enabling the development of tourism products and experiences is essential.







Byron Bay, New South Wales  
© Tourism Australia









## 4.2. Hong Kong, China

### a. Background

Hong Kong, China, offers a spectacular range of natural scenery within easy reach of urban areas. As of March 2024, approximately 40% of Hong Kong, China's land mass and 5% of its sea area have been designated as country parks <sup>1</sup>, special areas and marine parks, including:

- ▶ 25 country parks, 22 special areas, and seven marine parks with scenic hills, woodlands, reservoirs, coastline, and marine waters, most of them easily accessible to the public.
- ▶ The stunning Hong Kong, China UNESCO Global Geopark showcases world-class geological landscapes.
- ▶ Numerous hiking trails, outlying islands, and other green attractions for nature lovers.
- ▶ The 100-kilometre MacLehose Trail was listed on NatGeo's World's Best Hikes: 20 Dream Trails and
- ▶ Hong Kong Wetland Park, etc.

The Hong Kong Tourism Board (HKTB) is engaged in promoting Hong Kong, China's nature-based green tourism products and rural landscapes. This includes Hong Kong, China UNESCO Global Geopark, the natural scenery of various outlying islands, popular hiking trails and those with tourism appeal potential, and other green attractions. The HKTB is undertaking this promotion through a number of marketing initiatives, including the "360 Hong Kong, China Moments" 360-degree VR promotions as well as the "Hong Kong, China Great Outdoors" thematic promotion.

### b. Main policies

The Tourism Commission was established in May 1999 to coordinate various tourism development efforts within the government and provide policy support and leadership on tourism development in Hong Kong, China.

<sup>1</sup> Country parks is the official name as stipulated in the Country Parks Ordinance (Cap. 208, Laws of Hong Kong).

The Government works closely with the trade through various bodies, including HKTB, the Travel Industry Authority (TIA), the Travel Industry Council of Hong Kong (TIC), as well as advisory bodies such as the ceased Tourism Strategy Group, the new Tourism Strategy Committees, and the Advisory Committee on Cruise Industry.

The government and HKTB have been actively promoting green tourism and exploring the development of new green attractions that align with the principles of nature conservation and sustainable development.

### **c. Demand**

#### Visitor profile

In 2023, approximately 1 in 14 overnight visitors participated in outdoor / wellness activities in Hong Kong, China. The incidence is higher among long-haul visitors, particularly from Europe (17%) and Australia / New Zealand (12%).

#### Motivation

A number of studies have indicated that nature-based tourism has emerged as one of the most enduring trends among international travellers following the pandemic. From an urban city like Hong Kong, China, its great outdoors offers a kaleidoscope of adventure opportunities. The city's abundance of green spaces and hiking routes provides travellers with myriad opportunities to reconnect with nature and escape the city's bustling environment. The city's green offerings have become a strong attraction for travellers worldwide as the emphasis on sustainability and wellness continues to grow.



### The most valuable sources of information for decision-making

HKTB's website has a dedicated page for Hong Kong, China Great Outdoors (<https://www.discoverhongkong.com/eng/explore/great-outdoor.html>). This showcases a wide variety of green offerings, including hiking, beaches, water sports, sightseeing, and island hopping.

The growing popularity of hiking among residents and visitors has led to the emergence of numerous hiking websites offering valuable recommendations and options for hikers. Furthermore, the Government also has a thematic website (<https://www.hiking.gov.hk>) that provides locals and tourists with detailed information in four languages, namely Chinese, English, Japanese, and Korean, for hiking trails in the city. This information includes details such as the trail location, the level of difficulty, the duration required, the transportation information, and more. As of the end of February 2024, the thematic website has received over 4.08 million page views. In response to the growing demand for nature and adventure tourism, the market has seen the emergence of a wider range of tourism products, including professional tours for hiking, cycling, kayaking, and camping facilities.

### The most important travel trends

Island hopping and hiking are the most popular activities in Hong Kong, China.

### Travel expenses

In 2023, overnight inbound visitors spend an average of USD 880 in Hong Kong, China. There is no specific breakdown of tourist spending by nature of activities.

## **d. Main tourism products**

Hong Kong, China, offers a wide range of hiking trails suitable for different types and segments of visitors. Visitors can plan their journey with detailed hiking trail information online. Some of the most popular hiking trails among visitors include MacLehose Trail and Dragon Back.



Regarding island hopping, Lantau Island and Tai O are some famous islands that are famous for city escapes. Additionally, the Sai Kung Hoi Arts Festival provides a unique island-hopping experience for visitors. Kaito services with two different routes connecting Sai Kung Town with Yim Tin Tsai and Sharp Island and Sai Kung Town with Kau Sai Chau and High Island were offered to visitors during the event.

#### **e. Outcomes / Lessons learned / Best practices**

Hong Kong, China has been implementing measures to enhance the appeal and visitor support facilities of green tourism attractions to promote nature-based tourism.

The Government is promoting green tourism across the territory in line with the principles of nature conservation and sustainable development, leveraging the ecological richness and diversity of the area. For instance, the “Enhancement of Hiking Trails” project, which commenced in 2018, has been implemented to enhance the tourist-friendliness of 20 hiking trails with good tourism potential in the country park area. As of Q1 2024, the enhancement works on 12 hiking trails have been completed.

In particular, Lantau Island in Hong Kong, China, boasts a wealth of natural tourism resources and is an ideal destination for both locals and visitors to explore Hong Kong, China’s distinctive and picturesque rural areas. In addition to enhancing hiking trails, the Ngong Ping Nature Centre at Ngong Ping Village in Lantau underwent renovation in 2021. The Centre offers a range of interactive exhibits, including recommended hiking routes in the Ngong Ping area, as well as information on the area’s culture, history, biodiversity, and scenic spots. Additionally, the Centre offers map and hiking pole lending services and guided tours to enrich visitors’ travel experience in Lantau.

The Hong Kong Wetland Park is a world-class conservation, education, and tourism facility. It comprises a 60-hectare outdoor wetland reserve and a 10,000-square-meter visitor centre with five exhibition galleries. To enhance the park’s appeal as an eco-tourism attraction, Hong Kong, China has initiated a project to upgrade its exhibition and visitor facilities, and it will be aimed to complete by 2025.

HKTB has intensified its efforts to promote green tourism offerings and raise visitors' awareness, knowledge, and understanding of green tourism products in Hong Kong, China. For instance, HKTB launched 360 Hong Kong, China Moments through immersive videos and content in diverse formats showcasing arts, culture, heritage, outdoors, and sports experiences, and it has capitalised on digital and social media channels to expand its reach.

**f. Challenges**

- ▶ Hong Kong, China, is renowned as an international city with a dynamic and vibrant atmosphere. Therefore, it is essential that the government, HKTB, and the trade work together to raise visitors' awareness of the city's abundant and unique green tourism offerings.
- ▶ With social media's growing influence on travel inspiration, some attractions could instantly become popular. It is important to strike a careful balance to avoid overcrowding at specific green tourism attractions.





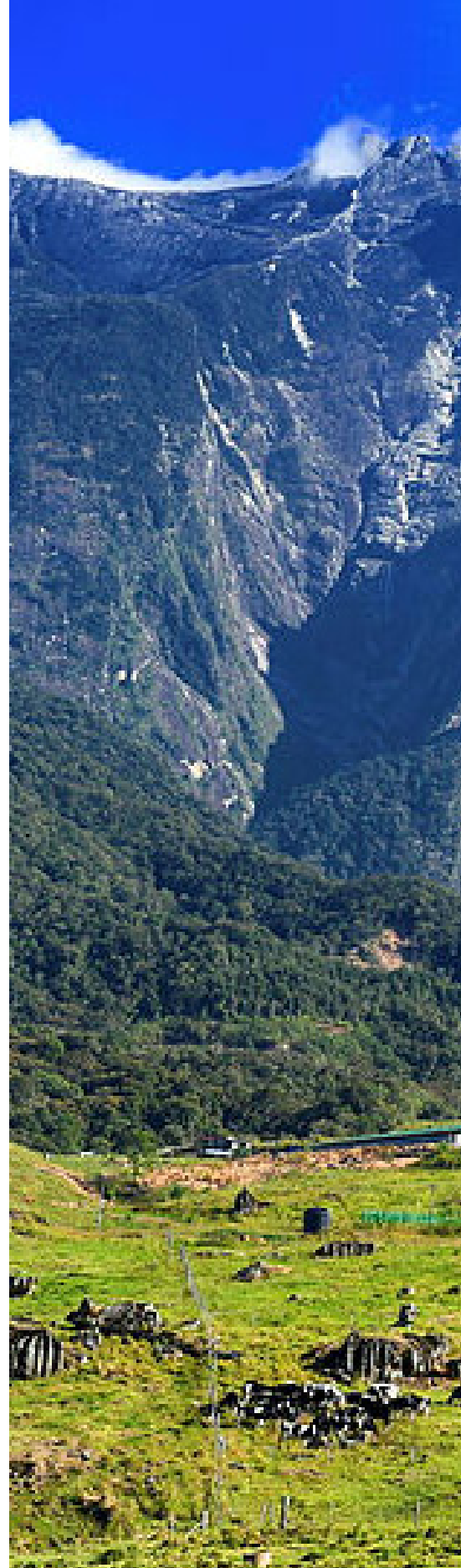
## 4.3 Malaysia

### a. Background

Malaysia's diverse attractions, encompassing its natural beauty, cultural heritage, and vibrant urban centres, attract millions of domestic and international visitors annually, contributing significantly to its tourism revenue. Malaysia boasts a number of domestic parks, wildlife reserves, and marine sanctuaries that provide habitats for a wide variety of flora and fauna, including endangered species such as orangutans, tigers, and sea turtles.

Malaysia offers a diverse range of nature-based tourism activities, including jungle trekking, bird watching, wildlife safaris, snorkelling, diving, and eco-adventures. Malaysia's commitment to sustainable tourism practices, conservation efforts, and community-based tourism initiatives ensures that visitors can experience Malaysia's natural beauty while contributing to its preservation and the well-being of local communities.

Despite declining visitor numbers due to the pandemic, Malaysia's travel and tourism sector remains a significant contributor to the country's GDP. In 2019, the sector accounted for 15.9% of the GDP. This decreased to 14.1% in 2020 and rebounded slightly to 21.8% in 2021.





Dairy Farm, Kundasang, Sabah  
© Tourism Malaysia



**Table 8:**  
**Contribution of travel and tourism to the Malaysia's GDP (2019-2022)**

Indicator	2019	2020	2021	2022
<b>Contribution of Tourism GDP to Total GDP 1/</b>	15.9%	14.1%	21.8%	14.0%
<i>Source: Department of Statistics Malaysia</i>				

Malaysia is actively striving to return to pre-pandemic levels of tourism following the gradual recovery of the global tourism sector from 2022 onwards. Consequently, the GDP attributed to travel and tourism increased to 14.0% in 2022.

**b. Main policies and regulations**

Malaysia's National Ecotourism Plan 2016-2025 provides a strategic framework for developing ecotourism initiatives across the economies. The plan strongly emphasises biodiversity conservation, community involvement, and sustainable tourism practices.

The plan will serve as a key instrument for the overall sustainable development of Malaysia and its economy and the conservation of ecotourism sites.

**c. Demand**

Visitor profile

Malaysia's total Nature-Based Tourism Market comprises 41.6% High-Value Travellers (HVTs) with four priority source markets: Australia; Japan; Singapore; and the United Kingdom. Among them, 30.6% are actively considering, planning, or have already booked a trip to Malaysia. The demographic profile is as follows:

i Australian demographic:

- Adult population (35%)
- Female (53%)
- Under 35 (42%)

ii. Japanese demographic:

- Adult population (15%)
- Female (54%)
- Under 35 (42%)
- iii. Singaporean demographic:
  - Adult population (61%)
  - A gender split of 50/50
  - Under 35 (42%)
- iv. British demographic:
  - Adult population (35%)
  - Male (53%)
  - Aged 35-54 (35%)

### Motivation

The travel motivations of nature-based tourists are diverse, with safety and security being the top concerns (76%), followed by quality and comfort (74%), immersion in local culture (67%), value for money (67%), and relaxation and rejuvenation (66%).

### The most valuable sources of information for decision-making

- ▶ Australia: Australians rely heavily on family and friends for travel inspiration but also use websites to plan their trips.
- ▶ Japan: The Japanese customer journey is particularly distinctive, with a high reliance on traditional media for inspiration and travel trade for booking and planning.
- ▶ Singapore: Singaporeans rely on word of mouth and social media for booking and planning.
- ▶ United Kingdom: British nature-based tourists tend to plan and book their trips through travel provider websites.

### The most important travel trends

The nature-based tourism market is growing as more and more travellers seek unique experiences in natural settings. A significant proportion of these tourists, 41%, dedicate at least half of their holiday to engaging in such activities. While participation in ecotourism activities is relatively low, at 12%, niche experiences such as cycling, rafting, diving, birdwatching, and fishing are top-rated.



### Travel expenses

The average expenditure on domestic trips decreased in 2019 and 2020 due to the impact of the COVID-19 pandemic. In 2021, the average domestic tourist expenditure per trip in Malaysia was recorded at USD 53, with tourists spending an average of 2.2 days. However, in 2022, this indicator increased significantly by 21.3% to USD 65 per trip.

**Table 9:**  
**Malaysia: domestic tourism expenditure in USD (2019-2023)**

Indicator	2019	2020	2021	2022	2023
Domestic tourism expenditure 1/	74	42	53	65	N/A

*Source: Statista Research Department. (2023, July 11). Average expenditure on domestic tourism trips Malaysia 2013-2022. Statista. <https://www.statista.com/statistics/875650/average-expenditure-per-domestic-tourism-trips-malaysia/>*



#### **d. Main Tourism Products**

##### The most popular destination

Malaysia offers a wide range of tourist destinations to suit different interests and preferences. Popular tourist destinations include:

- ▶ Exploring marine life through snorkelling or diving.
- ▶ Wildlife and landscape observation.
- ▶ Visiting UNESCO World Heritage Sites.
- ▶ Staying in luxury accommodation.

##### The most popular tourist attraction

The most visited Domestic Park and State Park in 2022 is the Kuala Gandah National Elephant Conservation Centre, Temerloh, Pahang, which welcomed 191,199 visitors. The Marine Parks in Terengganu recorded 239,113 visitors. Tunku Abdul Rahman Park in Sabah had 217,714 visitors, and Sama Jaya National Reserve in Sarawak had 93,751 visitors.

##### The most popular activities/circuits/ routes

Most nature-based tourists associate Malaysia with high-adrenaline activities, with 71% recognising it as a destination for thrilling adventures. In addition, 69% associate Malaysia with gentle nature-based experiences in rural areas, highlighting Malaysia's appeal for both exhilarating outdoor activities and tranquil escapes amidst the splendour of nature.

#### **e. Lessons learned and outcomes**

##### *Synergy between ecotourism and nature conservation*

- ▶ Strengthening the role and effectiveness of the National Ecotourism Committee.
- ▶ Establishment of a Malaysian Community-Based Ecotourism Network to improve representation and share best practices.
- ▶ Consolidate research by re-establishing educational research centres in selected domestic parks.
- ▶ Repositioning marine protected areas in Malaysia as ecotourism destinations that promote the conservation



and management of marine and terrestrial resources for the responsible enjoyment of tourists while enhancing the well-being of the local communities.

- ▶ Expand ecotourism through world-class guiding and interpretation.
- ▶ Increasing the use of homestays as staging posts to ecotourism sites.

#### **f. Challenges**

*Infrastructure and maintenance:*

- ▶ Inadequate funding for upgrading outdated facilities and infrastructure.
- ▶ Lack of funding to maintain facilities and infrastructure at tourist destinations.

*Lack of innovative products and internationally recognised events:*

- ▶ Existing products are not competitive or are seen as tired products.
- ▶ Lack of funding and support to diversify nature, arts, culture, and heritage products.
- ▶ Lack of funding for grants to encourage the organisation of high-impact events.
- ▶ Bureaucratic hurdles, especially in obtaining permission to organise programmes such as international concerts.

*Accessibility and connectivity:*

- ▶ Limited connectivity and accessibility to remote destinations (hidden gems).
- ▶ Flight frequency and seating capacity are low compared to pre-pandemic.







Tabin Wildlife Lookout Point, Lahad Datu, Sabah  
© Tourism Malaysia

*Ineffective promotion and Advertising:*

- ▶ The advertising and marketing budget is decreasing due to the falling value of the Malaysian Ringgit (MYR).
- ▶ Lack of digital advertising.

*Lack of comprehensive real-time data:*

- ▶ A comprehensive real-time data mechanism or ecosystem needs to be improved to support targeted and effective planning and decision-making.





## 4.4. New Zealand

### a. Background

The development of nature-based and adventure tourism in New Zealand over the past 20 years has focused strongly on safety to ensure the well-being of our tourists and, in the process, protect our reputation as a safe place to visit. It has also focused on managing rapid growth and the impacts of overtourism.

Queenstown is New Zealand's first and largest nature and adventure tourism destination. It is home to the world's first commercial bungy jumping, pioneering jet boating experiences, rafting, and several world-class ski fields. It has been a tourist destination since the 1860s.

For an overview and context of nature and adventure tourism in New Zealand, we must go well beyond the last twenty years to the turn of the century. The Queenstown area's many walking trails and tracks provided the early beginnings of New Zealand's tourism industry. During summer, visitors come from all over New Zealand and other parts of the world to experience walks such as the Milford, Routeburn, and Hollyford Tracks, all sold out yearly.

In 1947, the Mount Cook Group tourism and transport operator opened a commercial ski field at Coronet Peak, developing Queenstown into a year-round resort.

Queenstown's first adventure tourism came with the introduction of commercial jet boating in 1960. The jet boat, a New Zealand invention,









had just been developed and led to Kawarau Jet and Shotover Jet establishing jet boating through the canyons on the Shotover River.

Whitewater rafting quickly followed the success of jet boating, with Kon Tiki Raft trips launching New Zealand's first commercial rafting operation in Queenstown in 1974.

In 1988, the world's first commercial bungy jumping facility opened at the historic Kawarau Bridge, cementing Queenstown as the "world's adventure capital"

The nearby resort town of Wānaka (an hour's drive from Queenstown) offers similar products. On the North Island, the resort town of Taupō, on the edge of Aotearoa, New Zealand's largest freshwater lake, offers similar products. These days, there is not much difference between the regions in terms of the nature and adventure tourism products they offer, but Queenstown remains New Zealand's tourism mecca.

#### **b. Main policies, regulations, or standards**

More recently, New Zealand has focused on developing a regulatory system for adventure activities that has been directly influenced by high-profile incidents/events. Subsequent investigations have highlighted systemic health and safety issues and led to improvements being introduced through regulatory changes. These include regulations requiring operators to register their adventure activities and operations with the government.

For example, two major incidents/events that have led to changes in New Zealand adventure activity safety regulations are:

- ▶ The 2010 Fox Glacier FU-24 crash - where a modified plane on a parachuting flight, crashed, killing all nine people on board. A subsequent report by the Transport Accident Investigation Commission into this incident found failings by our Civil Aviation Authority (the body responsible for investigating air

crashes) in its investigation of the crash, as well as by the company accountable. In response, new rules for adventure aviation were introduced in 2011, setting higher standards and giving the Civil Aviation Authority greater oversight of such activities. A new health and safety regime for all adventure activities came into full effect in 2014.

- The Whakaari/White Island eruption in 2019 -resulted in 22 deaths and 25 injuries to tourists visiting Whakaari at the time of the eruption. Subsequent investigations led to WorkSafe New Zealand (the agency responsible for improving New Zealand's health and safety performance across all industries) laying charges under the Health and Safety at Work Act 2015, and the government announced changes to the adventure activity regulatory regime in 2022 to support improved safety.

The changes focus on four areas:

- i. Introducing specific requirements for adventure activity operators' assessment and management of natural hazard risks.
- ii. Strengthen requirements for operators to communicate risks to activity participants.
- iii. Strengthening registration and notification requirements for operators.
- iv. Review and update safety guidelines for adventure activity.

Other steps that the New Zealand Government is taking to manage pressures on nature tourism and the natural environment include free camping reforms and limiting the number of tourists per day on at least one major nature tourism product: the Tongariro Alpine Crossing.

In 2023, the Self-Contained Motor Vehicles Legislation Act was passed to address issues with vehicle-based camping (in particular, inappropriate waste disposal). The 2023-24 summer is the first in which the new rules will apply. The main reforms are:



- ▶ Establishment of a regulated system for the certification of self-contained vehicles, including a new regulator.
- ▶ Vehicles required to have a fixed toilet to be certified as self-contained.
- ▶ Vehicle-based freedom campers are required to use a certified self-contained vehicle when they stay on local authority land.
- ▶ Strengthened infringement regime, with a wider range of offences and higher fines for some offences.
- ▶ Introduction of an exemption for people experiencing homelessness from sanctions relating to freedom camping.

The changes the Government is considering for the Tongariro Alpine Crossing (on public conservation land) are aimed at better managing the pressure on the landscape (limiting the number of people per day) and enhancing the cultural and heritage values of the area. There is currently a trial booking system in place for those wishing to traverse the Crossing to test the feasibility of this idea. Bookings from the 2023/24 tourist season will inform the management of the Crossing, and visitor information and feedback will help the Government to shape future improvements. It is a model that could be applied to other nature tourism experiences impacted by high volumes of tourists.

### **c. Challenges**

The development and promotion of nature-based and adventure tourism are affected by challenges that affect other parts of the tourism sector. These challenges include:

1. Competition from other destinations, such as Australia, which New Zealand's target markets may perceive as offering similar experiences.
2. New Zealand is far from many of its major key visitor markets, and travel to these markets is associated with high costs.
3. Fluctuations in demand — Due to tourism's seasonal nature, demand for workers varies throughout the year, over weeks, over days, and between regions, meaning that workers may lack job security and be under—or over-utilised. Tourism expenditure is seasonal. Prior to



Waitomo Caves, Waikato  
© Tourism Holdings / Tourism New Zealand's Visual Library

the COVID-19 pandemic in 2019, total expenditure was 52% higher in summer than in winter. The number of jobs filled in tourism-related industries is also higher in the summer than in winter, reflecting the seasonal demand for staff.

4. Pay and conditions - Tourism generally has lower pay rates than other sectors and some poor working conditions/employment practices. The 2022 Tourism and Hospitality Workforce Survey found that approximately:
  - i. 8% of respondents were not paid the legal minimum wage for adults.
  - ii. 19% of respondents cited poor working conditions.
  - iii. 15% cited inadequate pay as a reason for leaving the industry.
  - iv. 23% of respondents had personally experienced bullying and harassment in the last 12 months.



5. Business maturity and scale - The tourism industry is predominantly made up of small and medium-sized enterprises (SMEs), with 87% having fewer than 20 employees (as of March 2020). Although this is slightly lower than the domestic share of 97%, the prevalence of SMEs in the industry often means a lack of scale, systems, capacity, and expertise to manage staff effectively and low levels of investment in employee training and development.
6. Current and future skills gaps - The industry sometimes struggles to attract and retain people with the right skills it needs. Many roles in the industry do not require a formal qualification, and many skills are learned 'on the job.' Total enrolments (both in provider-led and industry-led training) in qualifications that are part of the service sector have fallen over the last five years. The number of learners in retail, tourism and travel, aviation, and security within the services sector has dropped by almost 50%. While the decline can be partly attributed to the global pandemic and high employment rates, there is a wider trend of declining numbers of learners in tourism.









## 4.5. Peru

### a. Background

As one of the 17 megadiverse economies in the world, Peru has been a significant asset in developing nature-based tourism. Its biodiversity in terms of flora and fauna species includes a wide range of landscapes and ecosystems<sup>2</sup> that have motivated the creation of Natural Protected Areas. In fact, the origin of nature-based tourism in Peru is linked to the creation of the first domestic parks, such as Manu National Park, Huascarán National Park, and Paracas National Reserve, among others.

The first activities of adventure tourism can be traced back to the first expeditions of some travellers who began to explore the Andes in Peru. The first record of this type of expedition was in 1932 when a joint German-Austrian expedition reached the summit of Huascarán. After that, trekking routes became increasingly popular for international tourism, with Cusco (Inca Trail) and Ancash (Huascarán National Park) being the first destinations to promote this outdoor activity. While on the coast, river rafting in Lunahuaná began to attract domestic tourists in the 90s.

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2 Peru has 39 ecosystems, according to the Ministry of Environment. Available at: [https://cdn.www.gob.pe/uploads/document/file/309735/Memoria\\_descriptiva\\_mapa\\_Nacional\\_de\\_Ecosistemas.pdf](https://cdn.www.gob.pe/uploads/document/file/309735/Memoria_descriptiva_mapa_Nacional_de_Ecosistemas.pdf) (pag. 22)

















Since 2000, Peru has begun to promote new nature-based and adventure tourism activities in various destinations. This has been supported by the development of regulations and standards to ensure the competitiveness of this sector.

Thanks to this support, Peru is now recognised for its NBT and adventure tourism activities. For example, Peru is one of the countries with the most remarkable bird diversity (1879 identified species)<sup>3</sup>. Peru is also home to the largest number of butterflies in the world, with more than 4,000 species<sup>4</sup> in Cusco, the Amazon jungle, and the Manu Reserve in particular. This has served as the basis for nature-related activities.

#### **b. Main policies, regulations, or standards**

The MINCETUR is the authority responsible for organising, regulating, and planning the tourism sector in Peru.

An environmental management policy is essential to maintaining the excellent condition of a natural tourist destination. The rules or regulations that reflect the importance of this objective are the Environmental Policy of the Tourism Sector, mentioned in the National Strategic Plan for the Tourism Industry (PENTUR)<sup>5</sup>. The government is the stimulator, facilitator, guide, and promoter of environmental change in tourism activities carried out in destinations.

These are the basic guidelines that govern the tourism sector in Peru:

1. The tourism sector promotes and supports the sustainable use of natural and environmental resources.
2. It promotes the appropriate use of tourism resources and increases the destination's competitiveness, quality, and awareness.

<sup>3</sup> Source: South American Classification Committee (SACC) <https://www.museum.lsu.edu/~Remsen/SACCCountryLists.htm>

<sup>4</sup> Peru.info (2021). Available at: <https://peru.info/es-pe/turismo/noticias/3/17/-peru-es-el-pais-con-mas-especies-de-mariposas->

<sup>5</sup> MINCETUR (2016). Available at: [https://transparencia.mincetur.gob.pe/documentos/newweb/Portals/0/transparencia/proyectos%20resoluciones/RM\\_Nro\\_115\\_2016\\_Pentur\\_Proyecto.pdf](https://transparencia.mincetur.gob.pe/documentos/newweb/Portals/0/transparencia/proyectos%20resoluciones/RM_Nro_115_2016_Pentur_Proyecto.pdf)

3. The sector recognises that this use must be compatible with the needs of the current population, who should have a dignified and fair quality of life.
4. The sector is committed to promoting measures to control and prevent environmental pollution and to preserve the conservation of our biodiversity.
5. The sector recognises the need for a comprehensive vision of using natural resources to ensure the sustainability of current biodiversity services.
6. The sector is also committed to prioritising prevention as an economically, socially, and environmentally viable alternative.
7. It promotes reducing resource consumption, reuse, recycling, eco-efficiency, etc.
8. It also implements, maintains, and continually evaluates pollution prevention measures.
9. The sector recognises that the environment is a right and a duty for everyone.
10. The Sector commits all its members to a commitment to the conservation and responsible use of the environment's natural resources.
11. The sector promotes the creation of synergies within the sector and, in this way, at regional and local levels or community representation.
12. The sector recognises the obligation to incorporate continuous improvement in its processes as a prerequisite for competitiveness and improving the quality of services and products.
13. The sector is committed to ensuring that its operations do not affect the environment of other economies or areas of international jurisdiction.







MINCETUR has approved specific regulations to formalise the operation of adventure tourism:

- Supreme Decree No. 004-2008-MINCETUR- Regulation of tourist Canoeing.
- Supreme Decree No. 005-2016-MINCETUR/SG - Safety regulations for adventure tourism services.

### **c. Demand**

#### Visitor profile

According to research carried out by Promperu's Sub-Directorate of Tourism Intelligence and Prospects on the profile of foreign holidaymakers in 2019, nature and adventure tourists are millennials (52%), men (55%), and singles (53%) <sup>6</sup>. It is worth noting that Europe is the leading region of origin for adventure tourists, particularly travellers from France, Spain, and Germany. However, in terms of economy, the United States is the most important economy for Peru (26%) <sup>7</sup>. Regarding adventure activities, those interested in trekking, surfing, and mountain biking are mainly from Brazil (77%) and the United States (62%). On average, they spend more than USD 1,687 per person <sup>8</sup>.

#### Motivation

Visiting Machupicchu (52%) and learning about the culture and history (42%) are the leading travel motivations for nature tourists visiting Peru. In fact, in 2023, some protected natural areas registered high numbers of visitors. Machupicchu (955,741 visitors), Ballestas Islands (466,436 visitors), Paracas National Reserve (434,935 arrivals), and Huascarán National Park (197,586) were among the

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6 Peru Export and Tourism Promotion Board (PROMPERU) (2021). Nature-based tourist's profile. Available at: <https://www.promperu.gob.pe/TurismoIn//Reportes/DetalleReporte?reporte=70&redireccionar=1>

7 Peru Export and Tourism Promotion Board (PROMPERU) (2021). International adventure tourist profile. Available at: <https://www.promperu.gob.pe/TurismoIn//Reportes/DetalleReporte?reporte=80&redireccionar=1>

8 PROMPERU (2019). Adventure tourist profile: mountain biker. Available at: <https://www.promperu.gob.pe/TurismoIn//Reportes/DetalleReporte?reporte=111&redireccionar=1>



top 10 tourist sites with the most arrivals<sup>9</sup>. Although very few people cited visiting natural protected areas as their primary motivation, 98% of this group carried out this activity.

#### The most important sources of information for decision-making

Nature and adventure tourists use social media (62%) as their main source of information when making travel decisions. They also visit “YTúQuéPlanes.com” (51%) and virtual travel agencies (47%), followed to a lesser extent by recommendations from family or friends (38%) and travel websites (32%).

#### The most important travel trends (type of trip or activities)

Nature tourism remains a key focus for travellers worldwide due to its positive impact on their well-being. The recent growth in travel has led to the development of innovative outdoor activities that allow travellers to connect more meaningfully with nature and local communities. These new experiences are inclusive and cater to all types of travellers, not just those seeking rugged adventures<sup>9</sup>.

Among the activities undertaken by foreign adventure tourists visiting Peru, trekking (78%), boat trips (48%), and mountaineering (27%) stand out. Among nature activities, visits to lakes and lagoons stand out (64%), followed by bird watching (42%).

#### Travel expenses

For domestic nature-based tourists, the average expenditure is USD 175, but for those travelling with a travel agency, the average expenditure is up to USD 213. It is important to note that these figures are for 4-day trips on average. In addition, international tourists spend an average of USD 1,731 for 13 nights, more than three times more than the average traveller.

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<sup>9</sup> ATTA (2023). Adventure Travel Trends 2023. Available at: <https://www.adventuretravelnews.com/adventure-travel-trends-2023>

#### **d. Main Tourism Products**

##### The most popular frequent type of holiday

Since American tourists are the most frequent visitors to Peru, it is crucial to understand their travel behaviour during the holidays. Around 50% of American visitors have indicated that they prefer to travel during the end-of-the-year holidays, such as Christmas and New Year.<sup>10</sup> Their end-of-year travel plans are inspired by human connection and relaxation, indicating that nature and adventure tourism experiences would be the most practised if they were to visit Peru.

##### The most popular destination regions

The most popular nature-based tourism attractions are the Paracas and Ballestas Islands (Ica) and Tambopata (Madre de Dios), the latter positioned as an ecotourism destination. The most popular adventure tourism attractions are the Inca Trail to Machupicchu and the Huascaran National Park.

As for the visited destinations for Peruvian nature-based tourism, Cusco ranks first (17%), followed by Cajamarca (8%), Ancash (8%), Lima (8%), Ica (8%), La Libertad (5%), and Lambayeque (0.4%).

The most visited destinations for nature-based tourism by international tourists are Lima (100%), Cusco (91%), Puno (34%), Ica (31%), and Arequipa (28%). Nine out of ten tourists were foreigners<sup>11</sup>.

##### The most popular activities/circuits/routes

The most popular activities in nature-based tourism are wildlife and landscape observation. In adventure tourism, hiking and trekking are the most popular activities that international and domestic travellers prefer.

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10 PROMPERU (2023). Holidays trips 2023 for Americans. Available at: <https://www.promperu.gob.pe/TurismoIn/Reportes/DetalleReporte?reporte=277&redireccionar=1>

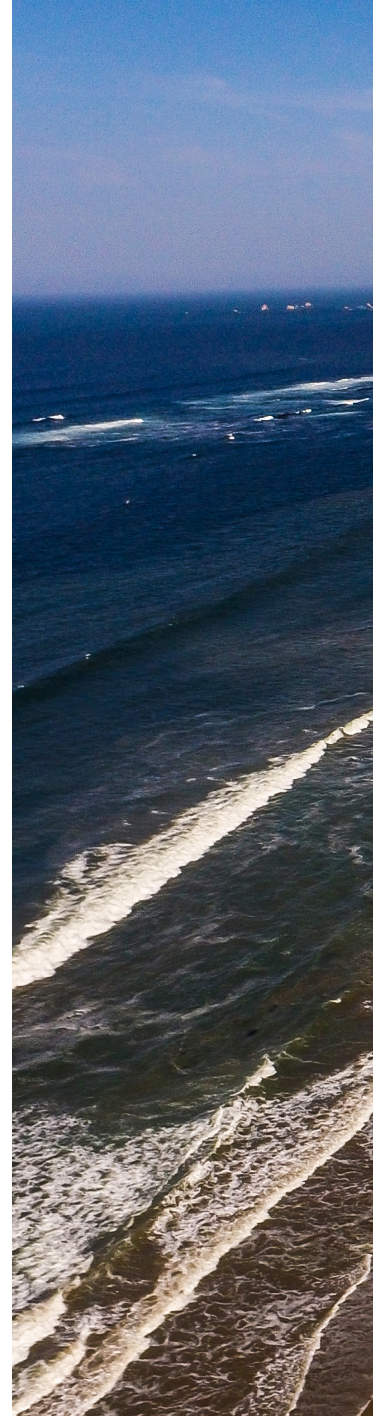
11 PROMPERU. (2023). The ten most visited in 2023\* Tourist sites, museums and natural areas protected by the State. Available at: <https://www.promperu.gob.pe/TurismoIn/Reportes/DetalleReporte?reporte=270&redireccionar=1>



### e. Outcomes and lessons learned

Nature-based and adventure tourism in Peru still has a long way to go to provide fully sustainable experiences for visitors, operators, and communities alike. Some of the issues that need to be considered are listed below:

- ▶ Climate change is expected to impact future travel planning significantly. As the climate crisis continues, colder destinations are promoted as more attractive choices, while hotter locations struggle to attract visitors.
- ▶ Travellers are increasingly aware of their environmental impact and are actively seeking ways to reduce or offset their carbon emissions<sup>12</sup>.
- ▶ Greater awareness of managing adventure tourism reduces informality in this sector and improves safety conditions.
- ▶ The adventure tourism regulation provides guidelines for good practice in adventure tourism services, with an emphasis on safety.
- ▶ Almost half (49%) of travellers think sustainable travel options are too expensive, while 43% are willing to pay more for certified sustainable travel options.
- ▶ A growing number of travellers are adopting environmentally friendly habits when they travel. For instance, 67% now turn off the air conditioning in their accommodation when not there, an increase of 29% by 2022. In addition, 60% choose to reuse the same towel several times, a rise of 25% by 2022<sup>13</sup>.



12 ATTA (2023). Adventure Travel Trend 2023. Available at: <https://www.adventuretravelnews.com/adventure-travel-trends-2023>

13 GSTC (2023). Cost vs Conscience: Booking.com Delves into the Dilemma Dividing Sustainable Travel in 2023. Available at: <https://www.gstcouncil.org/booking-com-2023-sustainable-travel-report/>





© Desierto Paracas  
Skyshot / PROMPERÚ

## f. Challenges

Some of the main challenges are the following:

- ▶ Implement new public and private investments to improve access, connectivity, and tourism services to develop nature-based and adventure tourism. For example: Choquequirao
- ▶ The adventure tourism sector must further strengthen its risk management and first aid capacities.
- ▶ Technical standards should be more widely disseminated and implemented by key stakeholders.
- ▶ Low level of associativity in adventure tourism.





## 4.6. The United States

### a. Background

The United States has long been a top destination for global travellers. According to the United Nations Tourism, the United States generates more travel exports than any other economy. The decade to 2020 was a period of broad-based growth in international travel into and out the United States. International visitor arrivals to the United States increased by 44.2%, from 55.1 million in 2009 to 79.4 million in 2019. However, the travel and tourism industry was among the hardest hit by the COVID-19 pandemic and subsequent health and travel restrictions. As a result, travel exports fell by almost 65 per cent between 2019 and 2020. The decline in travel and tourism contributed significantly to unemployment. Leisure and hospitality lost 8.2 million jobs between February and April 2020 alone, accounting for 37.3 per cent of the decline in total non-farm employment during this period. In 2021, inbound travel to the United States recovered slightly from 2020, increasing by only 15 per cent to 22 million. However, by 2022, following the end of major travel restrictions between the United States and other economies in November 2021, visitation doubled to more than 50 million, an increase of 128 per cent from 2021.

### b. Main policies, regulation, or standards

On June 6, 2022, the Secretary of Commerce released the National Travel and Tourism Strategy, which was recommended by the Travel and Tourism Advisory Board (TTAB) and







Lower Falls. Yellowstone National Park  
© ISTOCK

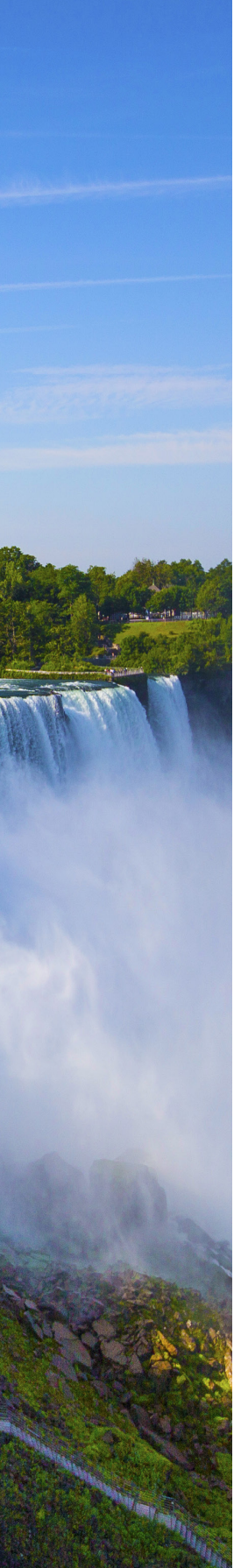






Niagara Falls State Park-New York  
© Brand USA





developed through the Tourism Policy Council, an interagency working group chaired by the Secretary of Commerce.

This blueprint brings a whole-of-government approach to supporting the recovery of the travel and tourism sector by focusing efforts to promote the United States as a premier global destination. The strategy sets an ambitious goal of attracting 90 million international visitors by 2027, spending an estimated USD 279 billion annually. The federal government is working to implement the strategy through a four-pronged approach:

1. Promote the United States as a travel destination: Leverage existing programs and assets to promote the United States to international visitors and expand marketing efforts to encourage visitation to underserved communities.
2. Facilitate travel to and within the United States: Reduce barriers to trade in travel services and make it safer and more efficient for visitors to enter and travel within the United States.
3. Ensure diverse, inclusive, and accessible tourism experiences: Expand the benefits of travel and tourism by supporting the development of diverse tourism products with a focus on underserved communities and populations, addressing the financial and workplace needs of travel and tourism businesses, and assisting destination communities in growing their tourism economies; and providing world-class experiences and customer service on federal lands and waters that showcase the domestic's assets while protecting them for future generations.
4. Foster resilient and sustainable travel and tourism: Reduce travel and tourism's contribution to climate change; build a travel and tourism sector that is more resilient to natural disasters, public health threats, and the impacts of climate change; and build a sustainable industry that integrates natural resource protection, supports tourism economies, and ensures equitable development.



### **c. Demand**

#### Visitor profile

Traveller profile characteristics are based on the Survey of International Air Travellers (SIAT). This profile includes trends in the inbound traveller profile of residents of overseas economies who visited a domestic park/monument during their visit to the United States. The top destination regions of origin are South America, Central America, and Europe.

The National Park Service (NPS) coordinates the collection of visitation statistics for more than 400 domestic parks across the United States. The total number of recreational visits was 327,516,619 in 2019 and 325,498,646 in 2023.

#### Motivation

During the pandemic, nature-based tourism drove both domestic and international travel, as many travellers wanted to be outdoors.

Those who visited domestic parks/monuments reported that their main motivation for travelling to the United States was for holidays/vacations or to visit family/relatives.

#### The most important sources of information for decision-making

The top three sources of information for trip planning used by overseas visitors who visited domestic parks/monuments on their trip are airlines, personal recommendations from family or friends, and online travel agencies.

#### The most important travel trends

Among the activities carried out by visitors to domestic parks/monuments, participation in activities at cultural/ethnic heritage sites and historical locations stands out.

#### Travel expenses

In 2022, overseas visitors to the United States spent an average of USD 246 per visitor/trip in the recreation and entertainment category.

In 2022, the outdoor recreation value-added economy accounted for 2.2 per cent (USD 563.7 billion) of the United States current-dollar GDP. At the state level, outdoor recreation value added as a share of state GDP was 5.6 per cent in Hawaii, 4.6 per cent in Vermont, 4.3 per cent in Montana, 4.1 per cent in Wyoming, and 4.0 per cent in Alaska.

#### **d. Main tourism products**

##### The most popular destination

In 2022, the top five States visited by overseas visitors were Florida, New York, California, Nevada, and Texas.

##### The most popular tourist attraction

The NPS reported the top five attractions for recreation visits in 2023 were Blue Ridge Parkway (16,757,635 visitors), Golden Gate National Recreation Area (14,953,882 visits), Great Smoky Mountains National Park (13,297,647 visits), Gateway National Recreation Area (8,705,329 visits), and Gulf Islands National Seashore (8,277,857 visits).

##### The most popular activities/circuits/routes

The most popular outdoor activities include domestic parks/monuments, camping/hiking, environmental/eco excursions, and hunting/fishing.

#### **e. Outcomes/ Lessons learned / Best practices**

- ▶ Recognising that federal lands and waters are under the jurisdiction of multiple agencies, we should advocate for a whole-of-government approach to provide the funding and other resources needed to address the significant deferred maintenance and improved infrastructure needs of vital natural resources.
- ▶ Focus on a whole-of-industry approach, including calls for private and public sector leadership to work together to protect and restore natural tourism assets, including waterways, shorelines, and domestic parks.



#### **f. Challenges**

- ▶ Need to enhance the capacity of well-known sites to absorb growing visitor demand for natural attractions.
- ▶ There is a need to promote lesser-known destinations less visited than the more popular destinations to manage over-tourism and spread the economic benefits across destinations.
- ▶ Improve access to natural parks and outdoor recreation sites to increase international tourism to domestic parks.
- ▶ Improve accessibility across the travel and tourism sector, including natural parks and outdoor recreation, to make travel more inclusive.

## 5. Conclusions and recommendations

### 5.1. Conclusions

- ▶ Before the pandemic, nature-based tourism (NBT) activities had grown at an average annual rate. However, during the COVID-19 pandemic, this sector received more attention from local and domestic visitors, leading to an increase in demand once restrictions were lifted. This increase in demand has led economies to capitalise on the growth of this sector and to implement conservation measures to ensure its sustainability.
- ▶ NBT offers an excellent opportunity to involve local communities in conserving their territories and finding an economic alternative.
- ▶ In remote destinations (hidden gems), where connectivity and accessibility are limited, improving these conditions through “green infrastructure” that manages the environmental impacts of these places is essential.
- ▶ NBT and adventure tourism must focus on ensuring the well-being and safety of all visitors and on controlling the risks associated with these activities.
- ▶ The development of nature-based and adventure tourism in the participating APEC economies depends on strong cooperation between industry and all levels of government.
- ▶ Economies are working towards the sustainable development of their NBT and adventure tourism destinations by implementing appropriate visitor management and nature conservation strategies to reduce the impact of tourism activities on wildlife and nature.
- ▶ Preventing overtourism in NBT and adventure tourism destinations remains a priority for the participating APEC economies.
- ▶ This report reflects the importance of natural protected areas or domestic parks for developing and monitoring NBT and adventure tourism.
- ▶ Providing training and better working conditions in NBT and adventure tourism is also relevant to reducing skill gaps and increasing employment rates in the destinations.





## 5.2. Recommendations

- ▶ To improve the overall tourism experience and remain competitive, APEC destinations are encouraged to explore alternative funding sources, such as private investment or public-private partnerships. This strategy can effectively contribute to the development of tourism infrastructure, the diversification of tourism products, and the enhancement of human capital in the sector.
- ▶ This report shows the importance of having updated and available information to evaluate the performance of NBT and adventure tourism, especially after a crisis such as the COVID-19 pandemic. Therefore, investing in continuously improving NBT and adventure tourism market analysis and data collection in each economy is essential.
- ▶ Aligning key performance indicators is needed to assess the competitiveness of NBT and adventure tourism in the APEC economies.
- ▶ Establish a standing group to share experiences and lessons learned to enhance the competitiveness of APEC economies in NBT and adventure tourism. Better regulation and higher standards for NBT and adventure tourism are essential to reduce incidents. In this sense, APEC economies could share their experiences on effective regulations and standards that have reduced incidents and risks and increased the safety of these activities in their destinations.
- ▶ Establishing a certification scheme can help improve environmental standards and ensure the industry complies with these guidelines. This strategy can improve the quality of service and the visitor experience, thus contributing to the destination's competitiveness.

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## 7. Annexes

### 7.1. Required information.

#### **NATURE-BASED TOURISM AND ADVENTURE TOURISM REPORT IN THE APEC ECONOMIES**

Peru has been selected to host the Asia-Pacific Economic Cooperation (APEC) in 2024. As part of Peru's commitment as a volunteer of the activity "Identify the potential of thematic travel and tourism corridors such as sports tourism, MICE tourism, quality tourism, etc." of the Priority Area 3: Travel Facilitation and Competitiveness of the TSP 2020-2024, in this context, the Ministry of Foreign Trade and Tourism of Peru (MINCETUR) has committed to prepare the report "Nature-based tourism and adventure tourism report in the APEC economies."

This document explores and analyses the development and potential of these segments in the APEC economies. To this end, MINCETUR is collecting and analysing the available information on nature-based tourism and adventure tourism in each of the 21 APEC economies. The report is intended for officials and decision-makers in APEC economies, as well as relevant stakeholders in the tourism sector.

Presenting a report on these segments is relevant because the sector has been growing for the past 14 years. Although the travel and tourism sector experienced one of its worst crises during the pandemic, people returned to visit natural sites as soon as they reopened. In fact, in some European and North American economies (such as Austria, Belgium, Canada, Finland, and the United States), domestic parks saw record numbers of visitors and quickly returned to 2019 levels.

This report will include information on domestic tourism statistics, policies and regulations, main tourism products, demand profile, good practices, and challenges related to nature-based and adventure tourism. Each economy will prepare and submit the requested information, which will be presented as a case study in this report.

Peru, through the MINCETUR, shall be responsible for editing and organising the content of this report. Each economy is responsible for the accuracy of the





information, terminology, grammar, typing, and wording. The content of nature-based and adventure tourism will be collected and submitted according to the template designed by Peru.

To define the scope of nature and adventure tourism activities, please refer to the following definitions:

- ▶ **Nature-based tourism (NBT):** This is a form of tourism that uses natural resources in a wild or undeveloped form. It is travel for the purpose of enjoying undeveloped natural areas or wildlife. This type of tourism is a continuum of tourism products, some of which are more desirable and sustainable than others and include ecotourism. NBT products also include tangible and intangible cultural heritage associated with natural heritage and the human experience of the landscape (and seascape in other areas).
- ▶ **Adventure tourism:** It is a type of tourism that usually takes place in destinations with specific geographical features and landscapes and is generally associated with physical activity, cultural exchange, interaction, and engagement with nature. The experience may involve some real or perceived risk and require significant physical and mental effort. It generally includes outdoor activities such as mountaineering, trekking, bungee jumping, rock climbing, rafting, canoeing, kayaking, canyoning, mountain biking, bushwalking, and scuba diving. Some indoor adventure tourism activities are also available.
- ▶ **Domestic Park:** This report refers to a protected area managed for its natural, cultural, and recreational value.

- Below is a template for considering specific and official information from the last five years to be included in this report. Additionally, each aspect has more detailed questions to provide the information.
- It is suggested that tables show the statistical information and a text explaining the main trends be included. Tables should be in Word or Excel and never be sent as images.
- For monetary figures, consider expressing them in US dollars.
- Remember to cite all the references in the APA format to be included in the bibliography of this report.

## **NATURE-BASED TOURISM AND ADVENTURE TOURISM REPORT IN THE APEC ECONOMIES**

### **1. Tourism in the APEC economies**

Provide official information about the following domestic tourism indicators:

- a. Contribution of Travel and Tourism to Gross Domestic Product (GDP), which is the direct contribution of tourism to the economy.
- b. International tourist arrivals are the number of tourists travelling to an economy other than the one in which they are usually resident and outside their usual environment for a period not exceeding 12 months and whose main purpose of the visit is not an activity remunerated from within the economy visited.
- c. Inbound tourism expenditure is the tourism expenditure of a non-resident visitor in the economy of reference.
- d. Domestic trip: a trip with a main destination within the economy of residence of the visitor.
- e. Domestic tourism expenditure is the tourism expenditure of a resident visitor in the economy of reference.
- f. Employment in tourism can be measured as the number of persons employed in tourism in any job, the number of persons employed in tourism in their main job, or the number of jobs in tourism industries.

### **2. Nature Based Tourism and Adventure Tourism in the APEC economies**

**Economy name**

- a. Background: Briefly describe how nature-based tourism and adventure tourism have developed over the last 20 years.
  - What were your economy's top 3 or 5 milestones of these tourism segments?
  - What were your economy's first destinations or tourism products offering nature and adventure experiences? (Name 2 or 3 destinations and tourism products)



- b. Key policies, regulations, or standards: Briefly describe the main policies, regulations, or standards adopted by public institutions that have supported the development of nature-based and adventure tourism.
  - What has resulted from implementing these policies, regulations, or standards? (Give 2 or 3)
  - What significant changes have these policies, regulations, or standards brought out? (Give 2 or 3)
- c. Demand: Briefly describe the main characteristics of the target market for nature-based tourism and adventure tourism.
  - Profile of the visitor: What percentage of nature-based and adventure tourists are men and women? / What percentage of nature-based and adventure tourists are single, married, or divorced? / What is the most relevant age range for nature-based and adventure tourists? What is the educational level for nature-based and adventure tourists? / What are the leading economies from which nature-based and adventure tourists come?
  - Motivation: What is the main reason for travelling to the economy and experiencing nature-based and adventure tourism?
  - Main sources of information for decision-making: What websites, platforms, or channels do nature-based tourists and adventure tourists use to decide to travel to the economy?
  - Main travel trends (type of trip or activity): What is the most common type of trip or activity by nature-based and adventure tourists in the economy?
  - Travel costs: What is the average amount spent on travel by nature-based and adventure tourists in the economy?
- d. Main tourism products: Briefly describe the main information on the tourism products.
  - A most popular type of holiday: What kind of holiday trip do nature-based and adventure tourists buy more frequently?

- The most popular destination: What is the most popular destination for nature-based and adventure tourists?
  - The most popular tourist attraction: What is the economy's most important nature-based and adventure tourism attraction?
  - The most popular activities/circuits/routes: What is the most popular activity, circuit, or route for nature-based and adventure tourists?
- e. Outcomes / Lessons learned / Best practices: What are the primary outcomes, lessons learned, or best practices implemented by the economy to develop or promote nature-based and adventure tourism in its territory? (Mention 2 or 3 of them)
- f. Challenges: What are the main constraints or barriers the economy faces in developing or promoting nature-based and adventure tourism in its territory? (Mention 2 or 3 of them)

**NOTE:** To make the content more vivid, each economy should provide approximately ten high-quality photographs (300 dpi in JPG or TIFF format and horizontal orientation) for each content section according to the template. For example, natural landscapes and adventure activities, and tourists engaged in nature-based and adventure activities. Each image, illustration, table, or graph must be correctly captioned, referenced, and credited. No emblems, flags, or maps will be accepted to comply with APEC nomenclature.







