



Destination Stewardship, Responsible Travel, & Sustainable Tourism

A GLOBAL TRENDS REPORT

Stewardship, Responsibility, and Sustainability in their simplest terms... means **BALANCE**.



DESTINATION STEWARDSHIP

brings together community allies to find a **balance** between residents' quality of life and visitors' experience.



RESPONSIBLE TRAVEL

encourages visitors to **balance** enjoyment of local heritage and nature with respect for community assets.



SUSTAINABLE TOURISM

emphasizes industry operations that balance economic returns with social responsibility and environmental conservation

As travelers become savvier, these concepts are increasingly important.

SUSTAINABILITY
MATTERS
TO TRAVELERS

83%

of travelers say that sustainability in travel is important to them



Travelers prefer to support **SUSTAINABLE** businesses with their wallet.

56%

of travelers are willing to pay more to support environmentally responsible providers.

BUT...

would feel better staying in accommodation with sustainability certification.

IN REALITY...

of accommodations implement sustainable practices, but 69% do not communicate their efforts effectively

74%

THIS IS A MISSED OPPORTUNITY BECAUSE...

44%

of travelers don't know where they can find sustainable options



COMMUNICATION
SPOTLIGHT
Sonoma, CA

Sonoma County's sustainability homepage links to a Sustainable Travel Guide, where visitors can develop entire itineraries with sustainable lodging, restaurants, shops, and experiences. Not only are visitors able to find tourism providers that meet their needs, but sustainable businesses in the region benefit from additional marketing.

2

Places Need It

OUTDOOR **NC**

Outdoor recreation is a significant part of the visitor experience.



OUTDOOR RECREATION TOURISM IS A RAPIDLY EXPANDING INDUSTRY

56%

of travelers seek more rural, off-the-beaten-track experiences to immerse themselves in the outdoors



BUT THERE ARE CONCERNS THAT REQUIRE COLLABORATIVE, COMPREHENSIVE, AND COORDINATED PLANNING



- **SEASONALITY** and visitor distribution
- **STRAINED** public infrastructure
- **CLIMATE** related impacts
- **INCLUSION** and representation
- **ECONOMIC** inequality

“

We are at an inflection point. Outdoor asset-based economic development presents a great opportunity for communities and there is money on the table to help activate and advance projects. But, if we are not planning for the effects of a shifting climate, or taking these opportunities to welcome underrepresented communities, then we are missing the mark, and the long-term return on investments will be diminished. Investments in outdoor assets and stewardship, in all aspects of the industry, must be part of the discussion.

”

Amy Allison, Director - NC Outdoor Economy Office

Investing in stewardship can have numerous benefits for places and people.

Through collaboration and planning, you can inspire your visitors to act responsibly during their visit and generate more value for your community

ENHANCES COMMUNITY ENGAGEMENT & INCLUSIVITY BY



75% of travelers want to have authentic experiences that are representative of the local culture when they travel

CONSERVES NATURAL & ENVIRONMENTAL RESOURCES BY:



71% of travelers want to leave destinations in a better condition than when they arrived

3

It's Good For Business

OUTDOOR **NC**

Tourism and outdoor recreation is big business in the US

In 2023 domestic
leisure travelers spent

\$855 BILLION

and international travelers
spent \$155 billion

In 2023, the outdoor recreation
economy generated \$1.2 trillion, or
roughly 2.3% of national GDP.

**THIS IS A LARGER SHARE
OF NATIONAL GDP THAN
OIL AND GAS EXTRACTION,
MINING OR AGRICULTURE.**

\$309.6 BILLION

or 25.8% of the entire outdoor
recreation economy, is from
tourism-related activities (arts,
entertainment, recreation,
accommodation and food services)

JOBS, JOBS, JOBS

**18.3
MILLION**

people were employed
in tourism in the US
in 2023, or 11.2% of
all US jobs



**EVERY \$1 MILLION
OF SALES**

in travel goods & services



DIRECTLY GENERATES

8 JOBS

compared to only 5
for other industries

**5
MILLION**

people are directly or
indirectly employed in
outdoor recreation
in the US



**FOR EVERY
JOB CREATED**
in the outdoor
recreation industry



3-4 JOBS

are created throughout
the entire economy

SUSTAINABILITY is good for the bottom line

Sustainability is all about
quality management and
assurance for the long-term,
something that all businesses
need to thrive

Sustainability gives businesses
a competitive edge and leads to
happier customers

50% of consumers say that
environmental factors
influence whether they trust a
company or brand.

Sustainable businesses
outperform others across
all industries

88% of sustainable-minded
businesses outperform their
broad market equivalents

The sustainable tourism
market is outpacing the
traditional tourism market

Globally, the sustainable
tourism market was valued at
\$2.73 trillion in 2023, and is
expected to grow at 14% each
year over the next 10 years, far
exceeding the overall tourism
market growth.

STEWARDSHIP | RESPONSIBILITY | SUSTAINABILITY

BALANCE

MATTERS TO VISITORS | POSITIVELY IMPACTS PEOPLE AND PLACE | IMPROVES ECONOMIC PERFORMANCE

Accessible Travel

The number of people with disabilities traveling is expected to nearly triple from 12.5 million in 2018-2019 to 33.4 million by 2028.

Unfortunately, nearly all people with a disability have faced barriers to travel, especially those with mobility issues. When travelers were asked how destinations could improve their appeal for visitors with mobility disabilities, 84% highlighted the need for more accessible information available before arrival, 83% pointed to expanding and better maintaining infrastructure such as sidewalks, ramps, and mobile lifts, and 81% suggested promoting accessible lodging options within the destination. DMOs can work with organizations to have their destinations verified and certified as inclusive and accessible. For example, High Point, NC is an Autism Certified City.

Wellness Travel :

Outdoor Recreation for health benefits

Wellness tourism is worth \$651 billion globally each year, and is expected to grow at 16.6% annually until 2027. The recent, and continuing, surge in wellness tourism is driven by travelers seeking holistic well-being experiences that integrate physical, mental, and spiritual health. Outdoor recreation activities, such as hiking in natural environments, has been shown to reduce stress and improve mood. This trend has been increasing post-COVID, as individuals prioritize health and seek open-air activities.

Regenerative Travel / Voluntourism

71% of global travelers want their travel to have a net positive impact, reflecting in an increased interest in “giving back”. Travelers are looking to improve the state of destination they visit. This may be through activities like environmental restoration, cultural immersion, and economic contributions to local communities. Some travelers prefer to participate in voluntourism, such as supporting with building projects, nature conservation, or helping in the recovery of communities after disasters. Another trend in regenerative travel is in skills and capacity building, for example, supporting a community not only by rebuilding structures, but by engaging in skills transfers such as sustainable farming techniques or eco-friendly construction methods.

Visitor Management

43% travelers are choosing to travel outside of peak season to avoid overcrowding.

Destinations like Machu Picchu, Peru, and Venice, Italy, are using reservation-only entry and peak pricing, reducing high-traffic periods and dispersing visitor flows. Off-peak promotions are increasingly popular, as it supports better distribution. Destinations are marketing to budget travelers (to avoid peak-season pricing) and flexible workers to attract visitation during quieter months. US National Parks are increasingly adopting technology for visitor management, including GPS tracking, digital reservation systems, and real-time data collection to monitor park capacity and visitor distribution.

DMO Strengthening

50% of DMOS are actively working in sustainability: 33% of those focus on economic sustainability, and 32% on environmental. DMOs are evolving from just destination marketing to destination development and management. As such, many DMOs are expanding their mandates. 84% of DMOs are now actively working on community engagement through relationship building, advocacy and community involvement. Regional and state tourism organization are supporting DMOs in their new roles. For example, Tennessee has a new Tourism Marketing Grant in place, allowing destination management organizations to expand the impact of their marketing message.

Dark Skies

The number of International Dark Sky Places (IDSPs) has been growing quickly since the first IDSP (Flagstaff, Arizona) was certified in 2001. With the growth in these certified areas, interest in stargazing experiences has been growing, creating an opportunity for destinations to capture economic impact of astronomy tourists. For example, a 2019 study in the Colorado Plateau (encompassing parts of Arizona, Colorado, New Mexico and Utah) forecast that dark skies tourism could bring \$5.8 billion in spending to the region over the next 10 years, generating over 10,000 jobs. Increasingly, Dark Sky destinations are leveraging technology to enhance visitor experiences, using mobile apps, such as SkySafari and Star Walk, allowing visitors to explore the constellations.



DESTINATION SPOTLIGHT Mesa, AZ

Mesa, Arizona, is a leader in accessible tourism and communicating what they have to offer. The city was America's first ever Autism Certified City, offering 'autism friendly' itineraries on their destination management site. The website also has a 'travel accessibility and inclusion' page offering accessible itineraries, accommodations, restaurants, and attractions. There's even a dedicated page for accessibility in outdoor recreation, listing adventure businesses that cater to people with disabilities.