



The Untapped Potential of Ecotourism in the GCC

Ecotourism is a growing segment of global tourism that focuses on connecting travelers with natural environments and local cultures while promoting education, sustainability and conservation. According to the United Nations World Tourism Organization¹ (“UNWTO”), ecotourism provides meaningful experiences that emphasize the appreciation of nature and heritage.

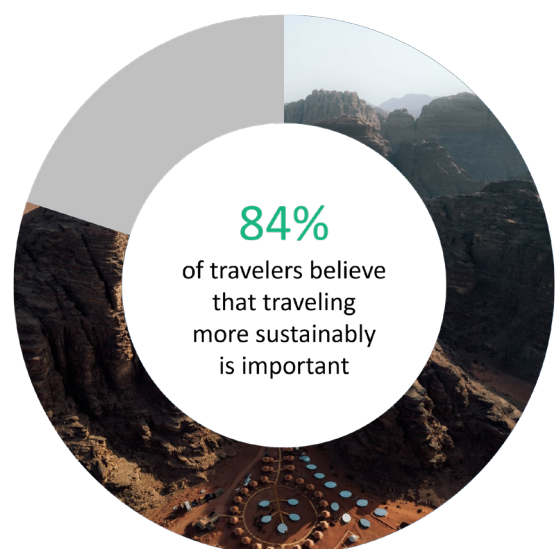
With traveler preferences shifting toward sustainability and authentic experiences, the global ecotourism market is heading for significant growth. Forecasts indicate it will surpass \$900 billion by 2034, growing at a Compound Annual Growth Rate (CAGR) of 14% from 2024.²

Several factors contribute to ecotourism growth:

Changing Traveler Behavior: A 2025 Booking.com survey found that more than 84% of travelers believe that traveling more sustainably is important while 77% of travelers seek authentic experiences that represent local cultures.³

Growing Popularity of Protected Areas: A global study published in PLOS Biology⁴ revealed that national parks and nature reserves attract eight billion visits annually, highlighting the rising appeal of nature-based tourism.

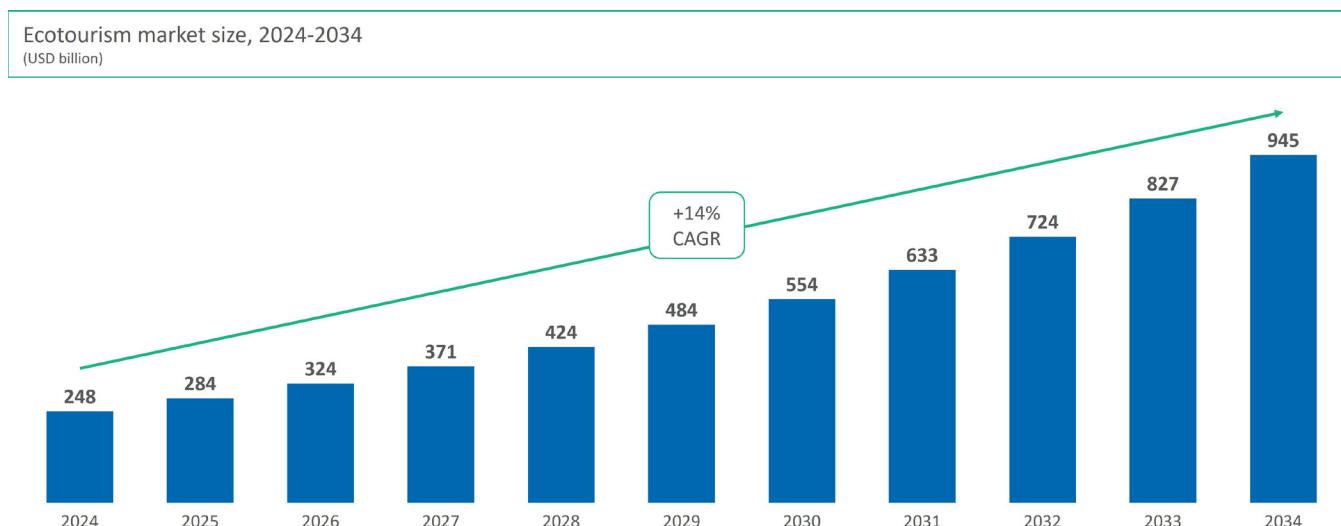
Rising Sustainability Awareness: A growing awareness of environmental challenges has motivated travelers to support tourism that benefits conservation and local communities.



Note: Survey conducted on a sample of 32,000 respondents across 34 countries and territories

Source: Booking.com

FIGURE 1 — THE GLOBAL ECOTOURISM MARKET IS PROJECTED TO MORE THAN TRIPLE OVER THE NEXT DECADE



Source: Precedence Research

The Benefits of Ecotourism

Ecotourism is increasingly recognized as a driver of sustainable growth, advancing progress at global, national and local levels while delivering long-term benefits across three dimensions:

- 1. Socio-Economic:** Ecotourism delivers tangible benefits to local communities by creating jobs, driving economic growth and improving infrastructure. It also fosters a conducive environment for local businesses and attracts private sector investment, providing the foundation for sustainable economic development.

Costa Rica's commitment to nature-based tourism has significantly bolstered its economy and conservation efforts. In 2019, the country welcomed nearly three million tourists, with approximately 80% engaging in ecotourism activities⁵. The tourism sector directly contributes approximately 6.3% to Costa Rica's national economy⁶. Ecotourism has also played a pivotal role in preserving Costa Rica's rich biodiversity. The influx of eco-conscious travelers has provided economic incentives for conservation, leading to the establishment of numerous national parks and protected areas.

- 2. Environment:** Ecotourism plays a vital role in preserving natural ecosystems and protecting biodiversity by promoting sustainable and low-impact travel practices. It generates funding that can be allocated to conservation efforts.

A case study in Botswana's Kalahari and Makgadikgadi Salt Pans⁷ showed how ecotourism

helped deter poaching and restore biodiversity. The areas that were previously facing significant wildlife decline now protect 164 mammal species, including 12 threatened species. The Makgadikgadi National Park currently hosts Southern Africa's largest herbivore migration, with 13,000 zebra and 3,000 wildebeest moving seasonally.

- 3. Education:** Ecotourism provides opportunities to learn about nature in ways that traditional mediums often overlook. By immersing visitors in natural environments, it offers insights into ecosystems, biodiversity and conservation efforts. These firsthand experiences enhance understanding, promote sustainable behaviors and foster greater support for environmental protection.

The Galápagos Islands serve as a global model for ecotourism, with an emphasis on education and conservation. The Ecuadorian government and the Galápagos National Park Directorate regulate visitor numbers and activities, ensuring minimal environmental impact while maximizing educational value. Tourists visiting the islands engage with expert naturalist guides certified by the park, who provide in-depth information on the islands' unique biodiversity, endemic species and conservation challenges.

FIGURE 2 — ECOTOURISM: A CATALYST FOR SUSTAINABLE DEVELOPMENT



Source: FTI Consulting

Advancing Ecotourism in the GCC

With a growing focus on ecotourism, Gulf Cooperation Council (“GCC”) countries such as Saudi Arabia, United Arab Emirates and Oman are actively developing projects to showcase their natural landscapes, cultural heritage and biodiversity:

- **Saudi Arabia** is actively developing its ecotourism sector through ambitious mega-projects like the Red Sea Project and Al-Ula, prioritizing ecosystem preservation, biodiversity, and cultural heritage. The Kingdom is also developing a vast network of royal reserves and protected areas to restore habitats, reintroduce native species, and promote sustainable tourism. Complementing these efforts, national and regional sustainability initiatives focus on environmental conservation and climate action. Together, these initiatives are supporting Saudi Arabia to positioning itself as a key destination for eco-conscious travelers, blending environmental preservation with unique tourism experiences.
- **United Arab Emirates** has one of the world’s most advanced tourism sectors and made significant investments in developing ecotourism through its national project, The UAE’s Natural Wonders, which launched in 2018. The UAE is advancing its ecotourism sector through sustainable projects like the Al Marmoom Desert Conservation Reserve and Sir Bani Yas Island, which offer eco-friendly activities such as wildlife watching and desert safaris. The country’s Green Economy for Sustainable Development strategy promotes conservation, renewable energy and green infrastructure.

- **Oman** is strengthening its ecotourism agenda as part of Vision 2040, which focuses on long-term conservation and biodiversity protection. Key initiatives include the development of nature reserves like Ras al Jinz for turtle conservation and Al Hajar Mountains for hiking and wildlife tourism. The country promotes sustainable tourism through eco-friendly accommodations, conservation efforts and responsible travel practices. With a strong focus on preserving its natural heritage, Oman is positioning itself as a top destination for nature-based tourism in the Gulf region.

Capturing Nature-based Tourism Opportunities

To develop a strong ecotourism industry, the GCC must prioritize five key success factors to drive its transformation.

I. Intertwined and executable strategies at all levels

To capitalize on ecotourism opportunities, countries must develop clear and actionable strategies at three levels:

- **National strategies** that set the overarching vision, goals and priorities for the ecotourism agenda
- **Regional strategies** that cascade national plans to address the cultural, environmental and economic characteristics of each region
- **Area-level strategies** that focus on specific sites with unique needs (e.g., conservation, visitor management and local community involvement)

II. Adapting offerings to visitor segments

Effective ecotourism strategies start with understanding and segmenting visitors to develop tailored offerings that meet their needs. Visitors generally fall into three main segments, including:

- **Nature Observer:** Motivated by strong environmental consciousness and a desire to preserve biodiversity and ecosystems, these visitors are highly knowledgeable and conservation-oriented. They seek meaningful connections with nature through activities like observing wildlife, exploring natural landscapes and participating in eco-friendly experiences.
- **Family:** Focused on spending quality time together, this segment prioritizes experiences that introduce children to the natural world and create lasting family memories. Educational opportunities are especially important, as families value activities that teach children about ecosystems, wildlife and environmental preservation. They typically also prefer experiences that are child-friendly, safe and affordable.
- **Luxury & Wellness:** Pursuing top-tier services, exclusive experiences and a retreat from urban life, these visitors prioritize relaxation and wellness. They favor activities that provide comfort for both body and mind, such as fine dining, tailored accommodations and stays in secluded villas or lodges that offer privacy and luxury. Pricing is generally less of a concern for this segment.
- Additional segments include, **Adventure & Sport** and **Culture & Art**, among others.

FIGURE 3 — VISITORS GENERALLY BELONG TO KEY SEGMENTS, INCLUDING NATURE OBSERVER, FAMILY, LUXURY AND WELLNESS, AND ADVENTURE AND SPORT

VISITOR SEGMENTS				
	NATURE OBSERVER VISITOR	FAMILY VISITOR	LUXURY & WELLNESS VISITOR	ADVENTURE & SPORT VISITOR
Description	Enthusiasts seeking to immerse themselves in the beauty of natural landscapes and wildlife	Groups looking for engaging and educational experiences suitable for all ages	Travelers seeking relaxation and rejuvenation in a pristine natural setting	Thrill-seekers looking for high-energy experiences in the wilderness
Favorite Activities	<ul style="list-style-type: none"> Birdwatching Guided nature walks Wildlife photography Nature tours 	<ul style="list-style-type: none"> Interactive trails Picnic spots Hiking Kid-friendly outdoor activities 	<ul style="list-style-type: none"> Spa treatments Meditation retreats Gourmet food tasting Private guided experiences 	<ul style="list-style-type: none"> Dune bashing Rock climbing Zip-lining Water Sports

Source: FTI Consulting

III. Designing visitor journeys

Designing every aspect of the end-to-end visitor journey is crucial to meeting visitors' expectations from arrival to departure. To elevate the overall experience of visitors while maintaining environmental protection, ecotourism destinations adhere to the guidelines and best practices put forth by the International Union for Conservation of Nature ("IUCN"). A typical journey can be summarized in five steps:

1. **Discovery:** Learning about the destination through the right channels, such as travel magazines, social media, influencers or other sources

Establishing credibility through official recognitions, such as IUCN Green List certification of Protected

and Conserved Areas¹⁰, serves as a guarantee of high conservation standards, attracting those who prioritize sustainability in their travel choices.

2. **Planning & Booking:** Providing support (e.g., agencies or advisors) to offer visibility on all available services, assisting with booking and driving excitement for the upcoming experience

The IUCN Green List of Protected and Conserved Areas reinforces confidence of potential visitors by ensuring that the site follows best practices in biodiversity conservation, responsible tourism and community engagement.

- 3. Accommodation & F&B:** Designing accommodations and food and beverage (“F&B”) options tailored to the targeted visitor segment, ensuring their needs and preferences are met throughout their stay

IUCN’s Guidelines on Sustainable Tourism¹¹ provide a framework to support the development of eco-certified lodgings and environmentally friendly accommodations by minimizing ecological impact and offering high-quality experiences.

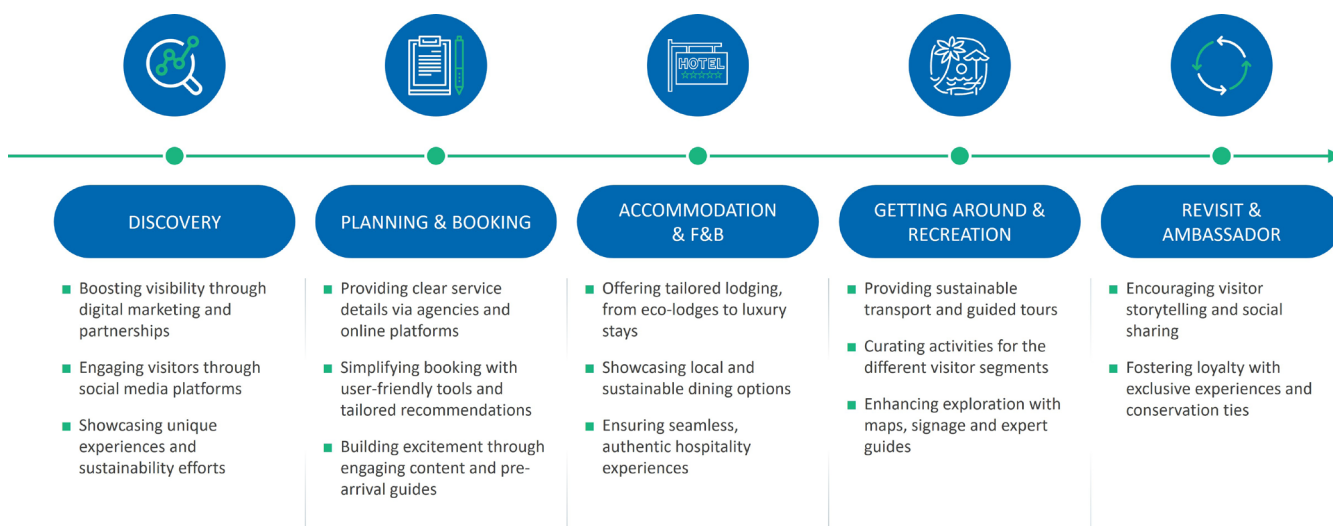
- 4. Getting Around & Recreation:** Offering activities that enable visitors to explore and engage with the destination while catering to different interests and activity levels (e.g., guided tours, nature walks and adventure sports)

IUCN-WCPA Good Practice Guidelines on Protected and Conserved Areas Series¹² advocates for low-impact mobility solutions, well-regulated guided tours and educational programs that raise awareness about conservation by maintaining a balance between visitor experience and environmental protection.

- 5. Revisit & Ambassador:** Creating memorable experiences that encourage visitors to share their stories and purchase local goods or souvenirs, fostering lasting connections with the destination

The IUCN Green List certification serves as a mark of excellence, reinforcing trust and advocacy among visitors, who, in turn, become ambassadors for the destination.

FIGURE 4 — A TYPICAL JOURNEY CAN BE SUMMARIZED IN FIVE STEPS: DISCOVERY, PLANNING & BOOKING, ACCOMMODATION & F&B, GETTING AROUND & RECREATION, REVISIT & AMBASSADOR



Source: FTI Consulting

IV. Implementing Government Support for the Private Sector

Governments play a crucial role in fostering private sector investment by offering incentives such as tax breaks, community grants and incentives for public-private partnerships. Some notable examples include Panama, the United States and Australia:

- **Panama** approved Law 122¹³ to encourage foreign investment in tourism, offering benefits such as tax exoneration for hotel buildings for up to 15 years and import tax exoneration for construction products for up to five years, thus boosting the construction of hospitality rooms and contributing to the Sustainable Tourism Master Plan for 2020 to 2025.
- **The United States** allocated \$750 million under the American Rescue Plan¹⁴ to support communities heavily reliant on travel and tourism. This funding

aims to support infrastructure development, workforce training and projects aimed to encourage private investment in sustainable tourism initiatives.

- **Australia** launched multiple initiatives closely in cooperation with tourism operators to manage and protect the Great Barrier Reef Marine Park.¹⁵ This collaboration includes initiatives such as the Environmental Management Charge and the Tourism Reef Protection Initiative, which empower tourism operators to monitor and protect the sites they visit by contributing to reef conservation efforts.

V. Involving Local Communities in Ecotourism Initiatives

Community involvement is vital for the success of ecotourism, offering local employment and training in hospitality and sustainable tourism practices. By supporting the development of strong and engaged



local communities, countries can enhance the long-term sustainability of ecotourism initiatives. Colombia and Kenya serve as prime examples of nations which have elevated the role of their communities to be key promoters of sustainable tourism:

- **Colombia:** In the Valle del Cauca region, locals have transformed their properties into eco-lodges, catering to birdwatching tourists, supporting both conservation and community livelihoods and turning Colombia into one of the world's premier birdwatching destinations.¹⁶
- **Kenya:** Ol Pejeta Conservancy has integrated livestock farming with wildlife preservation, thus creating employment opportunities for the local communities and funding the protection of endangered species.¹⁷

Conclusion

To unlock the full potential of ecotourism in the GCC, governments must embrace a well-defined and phased approach. It begins with crafting clear, actionable strategies that inspire alignment across national, regional and local levels. From there, the journey continues by shaping unforgettable visitor experiences that celebrate the unique character of each reserve, inviting private sector collaboration and empowering communities to become champions of their natural heritage. Through this harmonious blend of conservation and discovery, the GCC can position itself as a leading global ecotourism destination while safeguarding its natural and cultural assets for future generations.

Endnotes

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