

Ethics &
Economics

The Future of Elephant Tourism

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76% of Travelers Want Sustainable Travel - Sustainability Includes Ethics



- Rising demand for ethical tourism
- 76% of travelers want to travel more sustainably
- Growing concern about animal welfare

Data Reference

- Booking.com Sustainable Travel Report (2023)
- World Animal Protection (2026), *Bred to Entertain*



Is The Industry Responding Quickly Enough?



But the real question for all of us here today is:

Are we evolving fast enough—and in the right direction?

Because what we're seeing is not just a shift in tourism...
it's a shift in values.



The Industry Today: Slow Progress And The Stubborn Gap



2,849 captive elephants surveyed across 236 venues

The good news

- Riding ↓ 92% → 43%
- Shows ↓ 50% → 21%
- Yet
- Only 5% of elephants live in high welfare conditions
- Average welfare score 5.22 / 10 (no improvement in 15 years)
- Feeding and bathing now the dominant visitor experiences
- Welfare outcomes have not improved at scale
- Gap between intention and impact
- Greenwashing – tourists are being duped with low welfare venues marketing themselves as "sanctuaries".

Need for practical, scalable solutions and increased consumer and industry awareness

Data Reference

World Animal Protection (2026), *Bred to Entertain*

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Nearly 3,000 Captive Elephants In Tourism

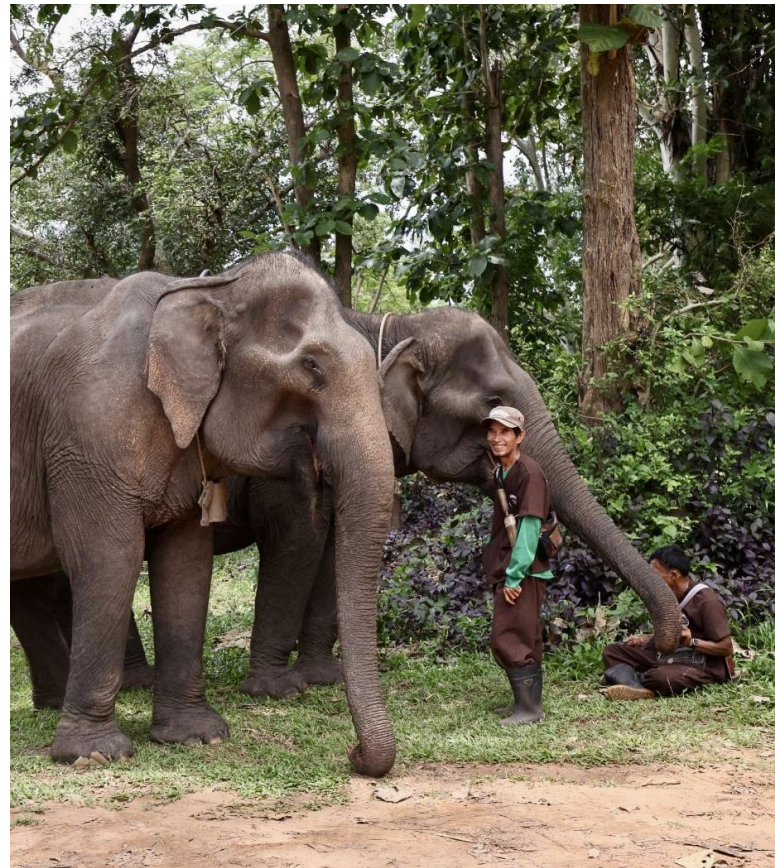


The Welfare Awareness Gap





What If Elephant Tourism Could Be Better? For Animals And For People



From Awareness To Opportunity: A Global Shift In Expectations



- Wildlife. Not Entertainers campaign
- Increased global awareness
- Changing traveler expectations



Data Reference

- World Animal Protection (2026), *Bred to Entertain*

The Need For Solutions: Turning Awareness Into Action



- This is no longer just a welfare issue—it reflects a broader shift in demand, where ethics is increasingly shaping consumer choices.
- At the same time, nearly 3,000 captive elephants are still used in tourism in Thailand—highlighting both the scale of the challenge and the need for a responsible industry transition.
- And success depends on viable, scalable alternatives and travel industry engagement.



Data Reference

- World Animal Protection (2026), *Bred to Entertain*
- World Animal Protection (2017), *Taken for a Ride*

What Already Works?

The Elephant Friendly (EF) Business Model: A Practical And Scalable Solution



- Observation-only = highest welfare (8.5/10)
- Welfare: Allowing natural behaviors, no direct interaction between elephants and travelers'
- Livelihoods: Mahouts central, skills transition
- Viability: Experience-based, ethics drives demand & market aligned

Data References

- World Animal Protection (2026), *Bred to Entertain*
- World Animal Protection – Internal Programme Data



Scaling The Future: From Model To Movement



Over 200 travel companies have committed to wildlife-friendly tourism, pledging not to sell or promote captive wild animal entertainment.

Wildlife tourism is valued at over US\$160 billion annually, with demand shifting toward ethical experiences.

In Thailand alone, elephant tourism generates up to US\$770 million per year, highlighting the economic importance of getting this transition right.

This is not only a moral imperative—it is a strategic opportunity aligned with market demand.

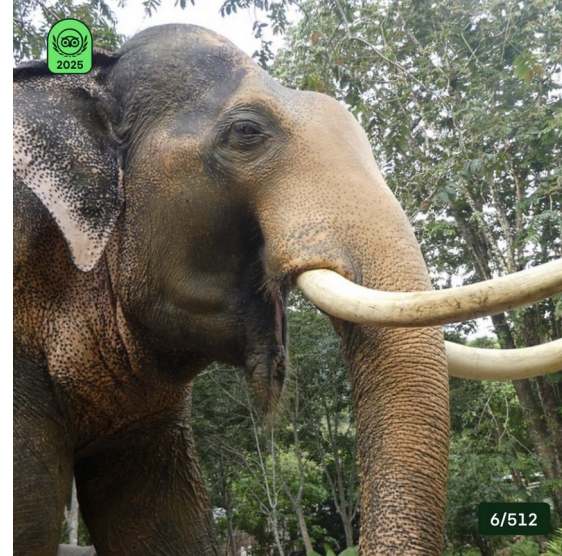
Data References

World Animal Protection (2026), *Bred to Entertain*

World Animal Protection – Internal Programme Data



The Movement



Elephant Forest Phitsanulok

"A forest where elephants roam, people reconnect, and nature thrives."

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Chang Chill

4.9 (231 reviews)

#2 of 13 things to do in [Mae Win](#)

Nature & Wildlife Areas



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Following Giants - Koh Lanta

4.9 (205 reviews)

#13 of 106 Outdoor Activities in [Ko Lanta](#)

Elephant Forest Phitsanulok

A 360-acre forest sanctuary where rescued elephants find a forever home and gently rediscover their natural instincts. It's a peaceful place where people reconnect with nature and where we lovingly preserve the forest for generations to come.

We are proud to partner with World Animal Protection (WAP) as a high-welfare and truly elephant-friendly venue where elephants can freely roam, forage, bathe, and rest on their own terms.

Partner with World Animal Protection (WAP)



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Book with Tripadvisor to earn rewards

Phuket Elephant Nature Reserve

5.0 (506 reviews)

#2 of 59 things to do in [Thalang District](#)

Policy And Legal Shifts Toward Ethical Wildlife Tourism

- As of early 2026, the Indonesian government has implemented a nationwide ban on elephant riding across all tourism and conservation facilities, including in Bali.
- This marks a significant policy shift, reflecting growing recognition of animal welfare concerns and the move toward more ethical wildlife tourism practices.



Data Reference

- World Animal Protection (2026). Indonesia bans elephant riding to protect welfare
 - Indonesian Ministry of Forestry (2025). Circular Letter No. 6 – Mandating the end of elephant riding nationwide
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A Proven Model Addressing Market And Sustainable Demands



- Proven in practice: 4 venues successfully transitioned since 2019 and business viable with 3 more underway for 2026
- Observation-only models deliver stronger welfare outcomes and are gaining traction
- Momentum is building across both supply and demand sides

Data Reference

- World Animal Protection (2026), *Bred to Entertain*
 - World Animal Protection – Internal Programme Data
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How Do You Think The Industry Should Change?

