

Key Travel and Tourism Trends for the Wildlife Sector

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Wildlife Tourism

- Terms reflects a wide range of products, experiences and approaches but is essentially a niche market
- Viewing animals, birds etc in their natural environment can be part of a mass market experience
- Experience heightened by quality of scenery, setting, knowledge and approach of guide, knowledge gained, meeting 'locals', personal contact an essential element of experience

Wildlife Tourism Scotland

- Predominantly private business / SMEs
- Marketing – via VisitScotland, Tourist Information Centres, Leaflet, Web site, some press and PR
- Electronic Marketing requires development and greater knowledge
- Customer Relationship Marketing remains in its infancy
- Concerns predominate in areas of conservation, environmental impact, 'over' marketing

Nature / Wildlife Tourism – Market

- World Tourism Organisation – estimate wildlife and eco-tourism accounts for 30 million trips (7% of world market)
- Market is small with growth potential
- Most commentators predict growth
- **Who is the market ?**
- **How do I reach them ?**

Wildlife Tourism Scottish Market

- Understanding the Consumer – think carefully about your customer
- **Enthusiast** – main purpose of visit to view wildlife / nature (preaching to the converted)
- **Casual visitor** – viewing wildlife / nature as an additional/ unplanned activity in discretionary leisure time (the unconverted)

Enthusiast : Wildlife as Main Part of Holiday Trip

- 200,000 holiday trips per year , £43m spend, 1.1million bed nights
- 69% English, 29% Scots
- Seasonal demand – July to September (47%)
- Car main form of transport
- Accommodation: Hotel, SC, VFR, B&B
- Age 45-64 (57%), ABC1 (80%)
- Repeat Visit Potential / WOM Importance

Casual Visitor: Nature as Part of Holiday Trip

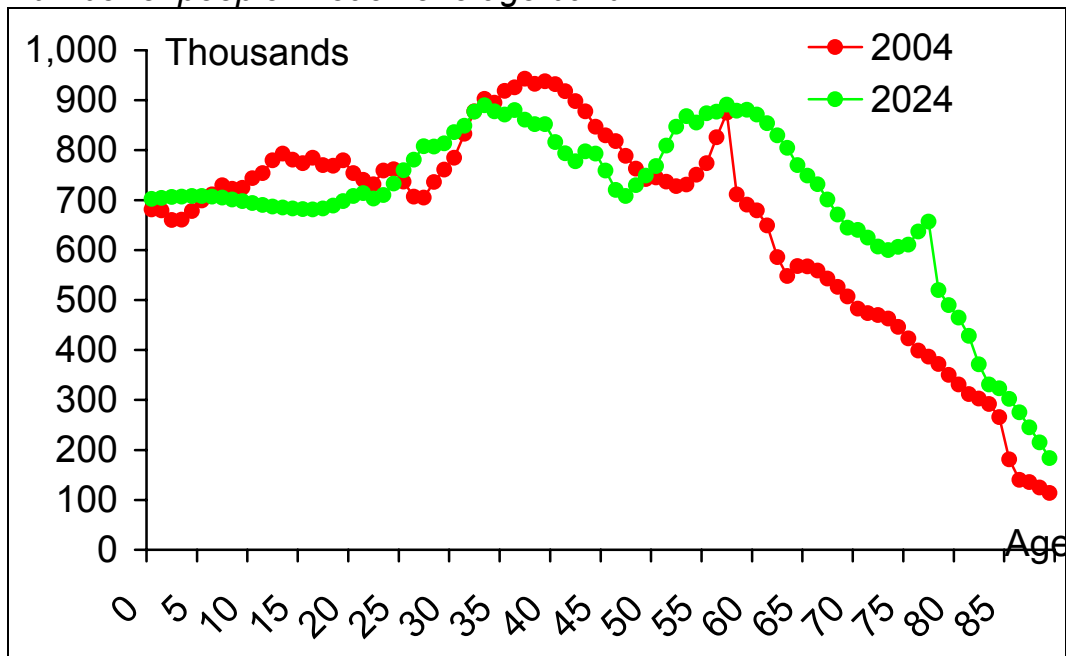
- 1.9 million holiday trips per year , £487m spend, 10.9 million bed nights
- 51% English, 46% Scots
- Seasonal demand – July to September (44%)
- Car main form of transport
- Accommodation: Hotel, VFR, SC, B&B
- Age 35-54 (46%),ABC1 (63%)
- Repeat Visit Potential / WOM Importance

Understanding the Visitor

- What characterises the visitor generating markets ?
- How can we reach them ?

Age Structure of the UK Population

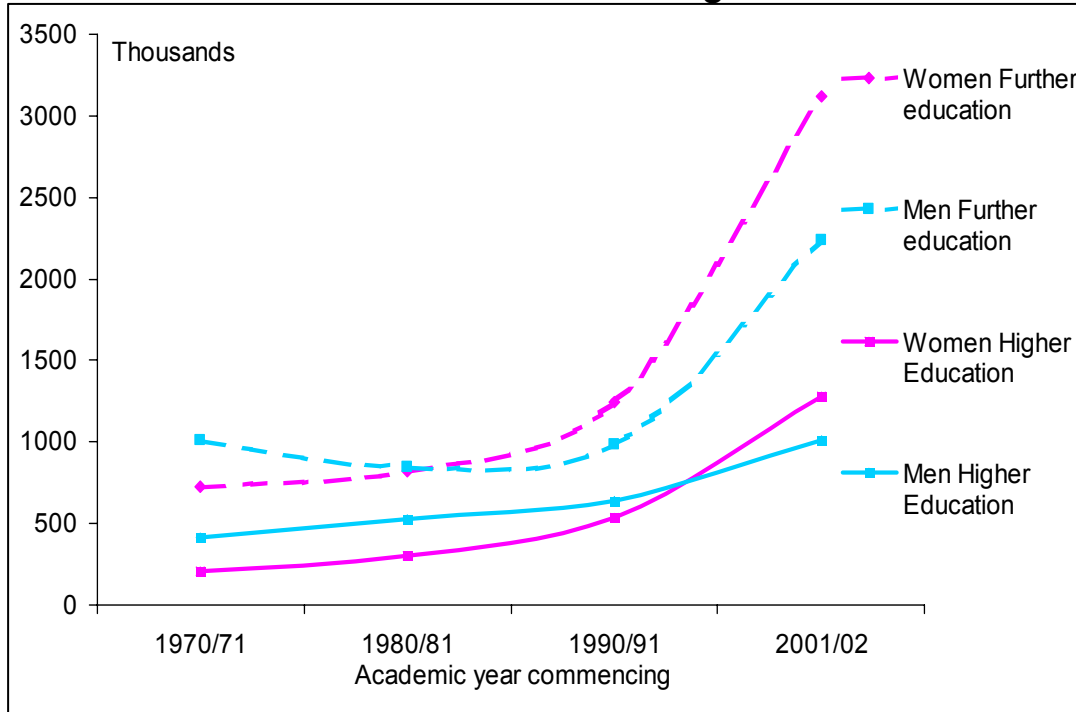
Number of people in each one age band



Source: Government Actuary's Department/nVision

Base: UK. 2002 based forecast

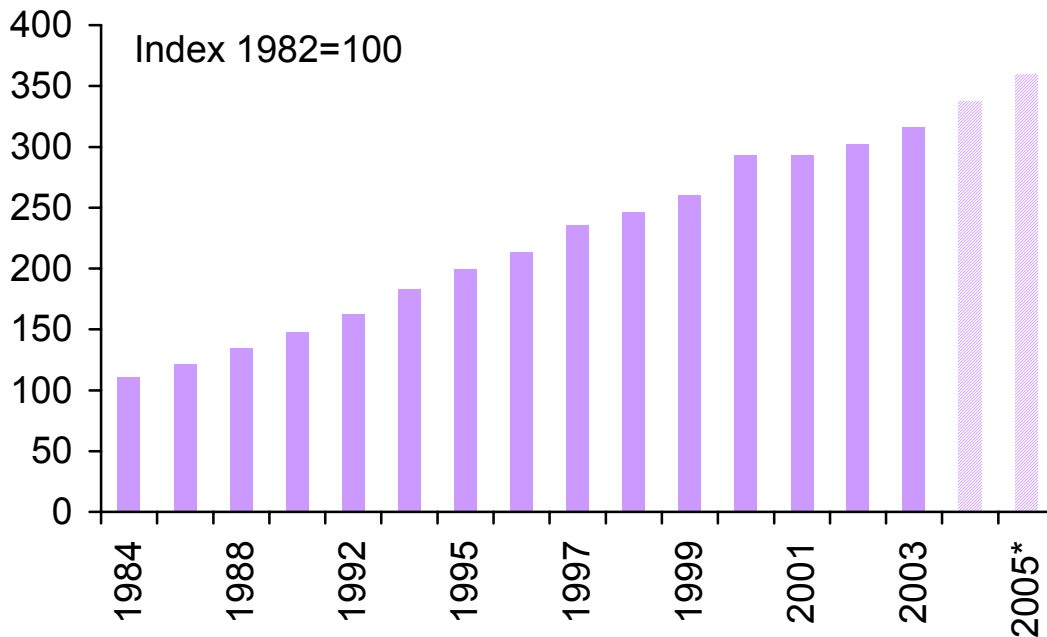
Education: Enrolments in further & higher education in UK



Source: DfES/nVision

Growth in world trade

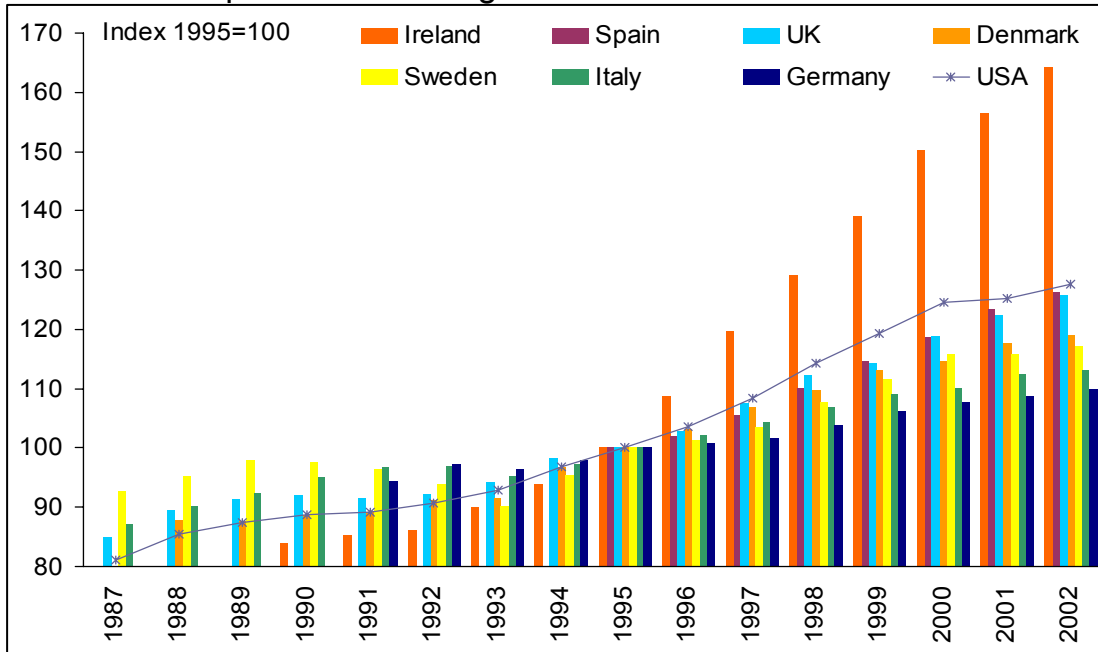
Annual percentage change in the volume of trade in goods and services, index 1982-2004.



Source: IMF/nVision

Affluent Society

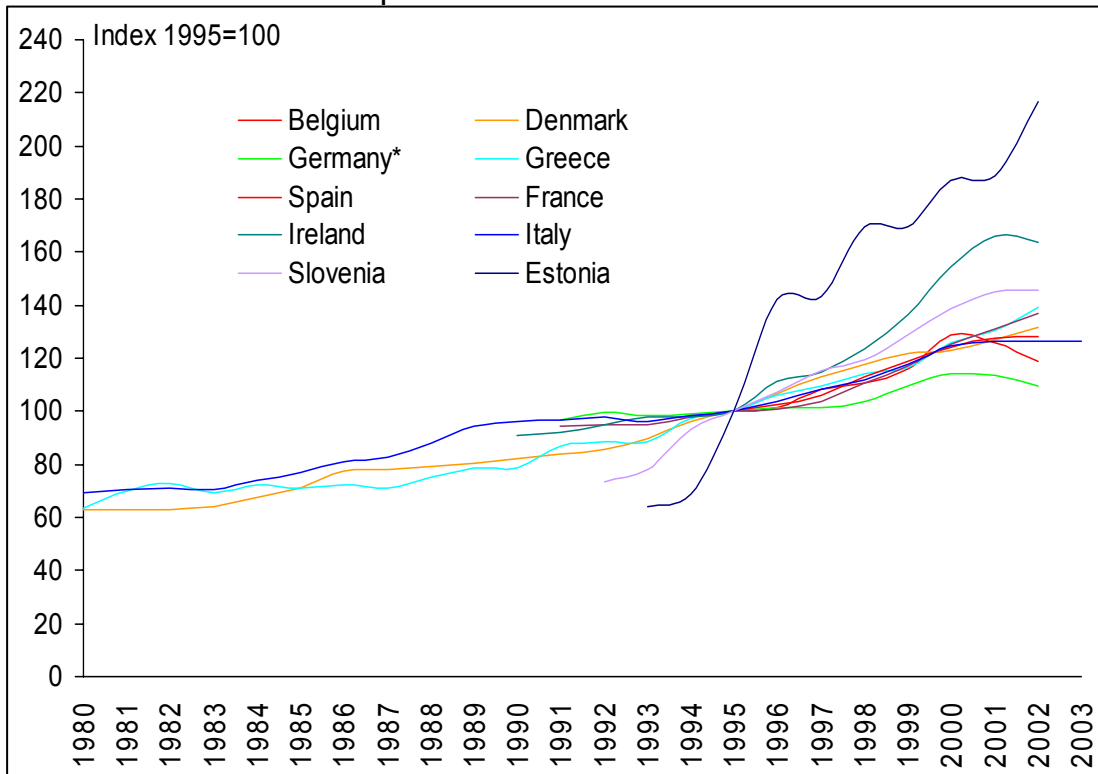
Household disposable income growth



Source: OECD 2002/nVision

The leisure society

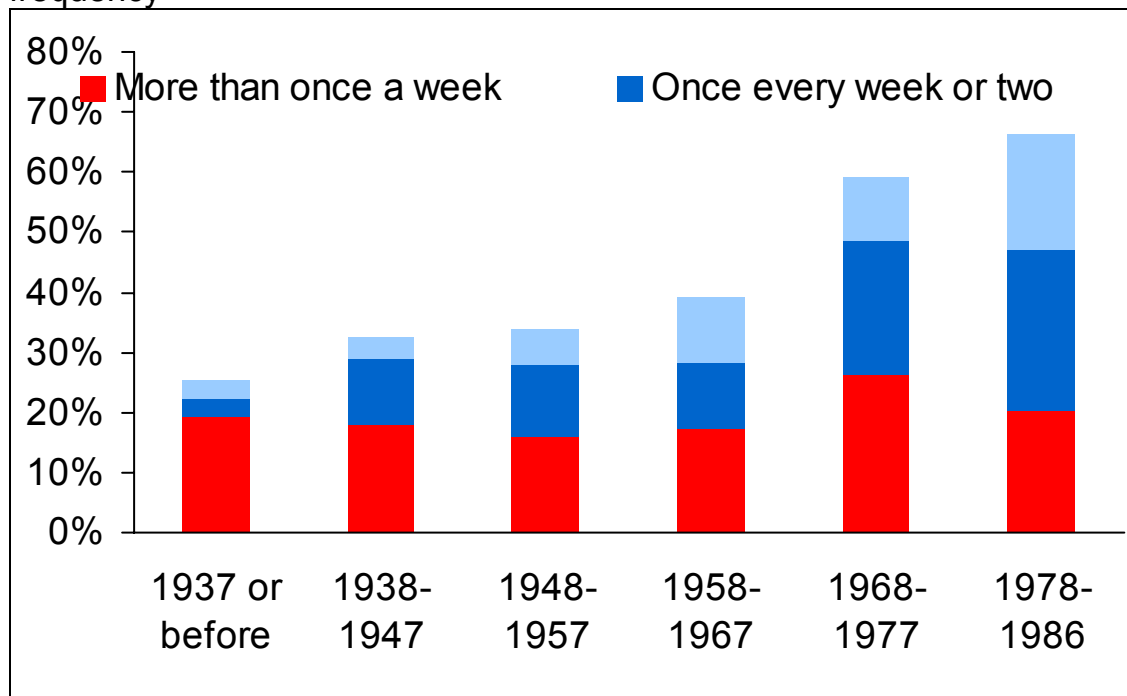
Growth in consumers expenditure in leisure



Source: Eurostat 2004/nVision

The Family: Frequency of grandparents looking after grandchildren

% who were looked after by their grandparents, by year of birth and frequency



Source: 'Complicated Lives', The Future Foundation/nVision

Base: 1010 Adults 16+

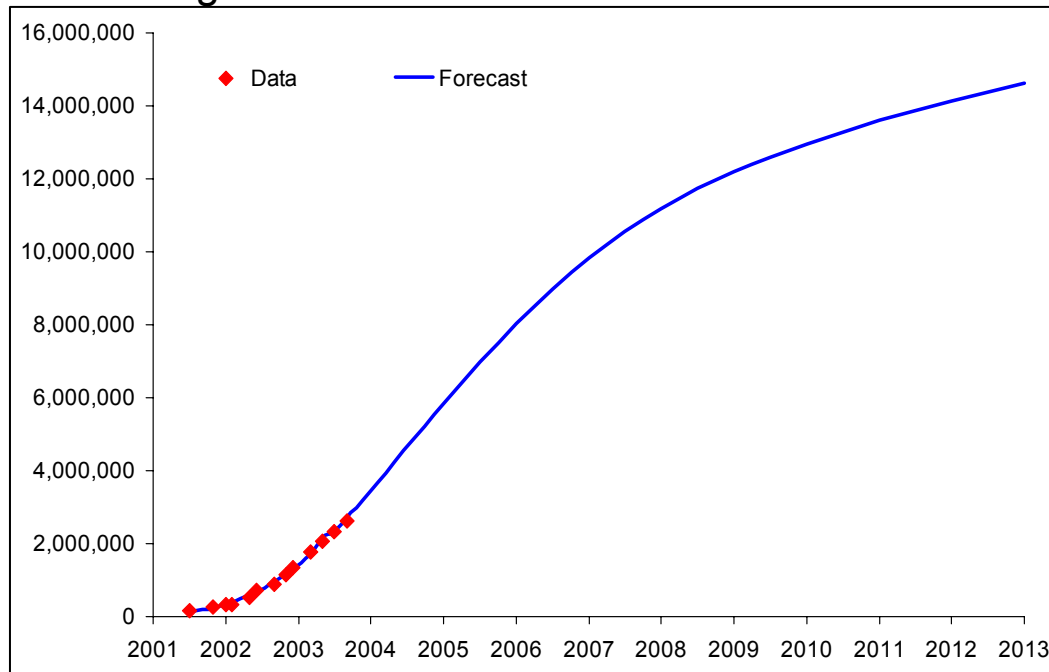
Wildlife Tourism – Scottish Market

- Consumer Profile – affluent, educated, interested in environment, mature, active, slight female bias
- Appeal – Empty Nesters, Younger Market, Family Market
- Appeal - significant in overseas markets – USA, Canada, Germany, Netherlands, Scandinavia
- Independent bookings will grow as will use of internet – DIY web booking increase as package declines

Nature / Wildlife Tourism – Market

- Reflects – growing environmental awareness
- Reflects – escape and focus on healthy living / well being
- Reflects – desire to see/ experience new things / sensations
- Reflects – widespread media coverage of natural world
- Can be vitally important to Scottish Tourism not simply a niche

Processing Power & Bandwidth: Forecasts of Broadband



The culture of immediacy

- 24 hour news
- Email
- mobile phones.

Reaching Markets

- The Centrality of Electronic Marketing
- The Internet is now a permanent fixture in the majority of US homes – this will rapidly follow for the UK
- Of all Americans who use Internet 85% use Search Engines (107m people in 2004)
- 38 m US Citizens are using Search Engines per day
- 4 Billion Queries each month (US)
- 550 million searches per day (worldwide)

Reaching Markets

- No. of internet users growing by 20% per annum worldwide
- No. of searches increasing by 25% per year
- The greater your education, affluence and sophistication the more you search
- Global Search Market Share (2005)
- Google 51%, Yahoo 24% MSN 13% Others 12%
- No of searches that convert to a purchase : 35%

Reaching Markets

- Visitor Acquisition Costs (Piper Jaffray 2005)
- Direct Mail £ 43.70
- E-mail £37.50
- Online Adverts £31.25
- Yellow Pages £ 12.50
- Search £ 5.30
- Search – a marketing method that did not exist in 1995 is the most efficient and inexpensive method of Marketing your business

Understanding Holiday Choice

- It's about compromise
- It's about clusters
- It's about mixing products and services
- It's about experiences

Managing consumer choice

- Trust
- Endless Choice
- Sorting

Wild Life Tourism - Scotland

- An obvious synergy – adds to attraction and image of Scotland
- Offers differentiation in activities
- Problems with infrastructure, product and service issues, communications and sales approach
- Beautiful Scenery / People – most positive associated response in visitor perception surveys
- Make it easy for all visitors to enjoy the natural world

Development Needs

- Knowledge - Improved Interpretation / Species ID and data on species
- Improved access with cognisance of ageing but active market
- More local guides / personal interface
- More customer facing marketing, promotion and communication
- Think Visitor Experience rather than product
- Raise General Market Awareness
- Differentiate markets between enthusiast and casual
- Improve local knowledge to capture impulse / activities market – familiarisation for other businesses (accommodation and heritage attractions) – create ambassadors
- Develop Packages – reduce the organisation requirements on the consumer - make wildlife more accessible
- Develop pleasure, comfort and care as part of package

Target Sustainable Tourism Market

- High Spend per day
- Stay longer at destination
- Engage in a number of leisure activities
- Tend to be retired thus seasonality less of an issue
- Derived from research on sustainable tourism in Austria (Dolnicar, 2004)

Visitor Needs

- Exploit cultural, heritage and scenic resources as a counterpoint to core wildlife product
- Understand importance of Physical and Service Quality Indicators
- Welcoming attitude
- Friendliness
- Customer Care and Attention to detail
- Atmosphere and Environment
- Quality of Food and Drink
- Does any of this come across on your website

Visitor Needs

- Hygiene and Sanitation
- Level of service
- Information for Visitors and how it is offered
- Signage
- Furnishings and Décor
- Safety and Security

Business in an uncertain world

- Start with the nature
- Understand the mass market
- Build belief and interest with better communication at all levels
- Think about how the visitor journey works
- START – Search – Website/ Brochure –image , text, message
- Response Time
- Nature of Response
- Telephone

Business in an uncertain world

- Arrival – signs, times, first words and first impressions
- The experience, the people, the welcome,
- What am I looking at ? (I am afraid to ask)
- What is the context, environment, links to heritage, culture
- Food, drink, temperature, climate, comfort

- What can I do tonight, tomorrow, when can I come back and why should I
- Departure – last words, last gesture, gift, repeat incentive
- Contact maintained ?
- What do you do with customer emails and addresses
- The centrality of Data capture
- Aging market and repeat visitation (30-35%)
- 1:3 strike rate much more effective than new business creation

Visitor Needs

- Packaging and Presenting the product – electronically and literally
- Linked marketing networks : accommodation, viewing activity, boat trip, food offer, retail, pub
- Most visitors will have 1-2 definite must do activities / attractions after this they are open to creative selling of products and services
- **How do you sell ?**
- A rack of paper or a conversation ?
- A list of offers or an itinerary for the day ?

Development Needs

- A map on the wall or a discussion of the best wildlife in the area ?
- Build a WOM net work of ambassadors
- Offer positive recommendation from a local perspective (accommodation and food providers)
- - website links, recommendations and comments
- - add value to an experience
- - build memories