

How Was The 2009 Season?

Summary of responses from Wild Scotland members (Nov 09)

- Total no. of respondents: 38
- Percentage of (eligible*) membership responding: 53%

*: No. of eligible members is 72. Total membership at time of survey was 80, however 8 'associate' members were not included in the survey as they do not provide direct tourism activities.

*For further information regarding the survey,
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1. Year on Year Comparisons

1.1 Business in General

Sixty one percent of respondents reported a better year than the 2008. This is an 18% increase to 2008's results. This is the highest percentage of members reporting a good year since the survey began in 2006 and shows the continuing success of wildlife tourism in Scotland.

YEAR	Much better	Better	About the same	Worse	Much worse	Not applicable	Total Responses
2009	8%	53%	29%	11%	0%	0%	38

1.2 Visitor Numbers

Fifty seven percent of members saw an increase in visitor numbers in 2009. This is a fifteen percent increase on last year. Only 8% of businesses saw a drop in customers which is less than last year, and the lowest percentage since the survey began.

YEAR	Much better	Better	About the same	Worse	Much worse	Not applicable	Total Responses
2009	8%	49%	35%	8%	0%	0%	37

1.3 The 2009 'Staycation'

For first year, members were asked whether they had seen the benefit of the 'staycation' this year. The term 'staycation' was used to describe British people choosing to holiday in the UK, and related to the recession and the weak sterling exchange rate. Interestingly 60% of respondents did think that there had been an increase in British visitors.

	% (N)
No	41% (14)
Yes	59% (20)
Total	34

2. Changes in Customer Behaviour

2.1 Customer Base

The majority of members (57%) noted a change to their customer base this year. This is a significant difference to last year when only 28% recorded changes.

	% (N)
No	43% (16)
Yes	57% (21)
Total	37

Of the 57% that noticed a change, the following changes were noted. By far the biggest change is a significant increase in European visitors. German, Dutch, Swedish and Swiss nationalities were mentioned specifically.

Customer Type	More	Less
European	13	
Families	4	
British	2	
Scotland	1	
Overseas (general)	1	
Walkers	1	
Wildlife photographers	1	
USA		1

2.2 Booking Behaviour

Two out of five respondents noticed changes in customer booking behaviour. It appears that later and more online bookings continue to be a trend.

	% (N)
No	60% (22)
Yes	41% (15)
Total	37

3. Changes in Species Sightings

3.1 In General

Wildlife tourism operators are out in the countryside or on the water every day during the summer and are therefore excellent monitors of changes in species. Wildlife sightings appear to have remained steady this year with the majority of respondents reporting that sightings were about the same as last year and no members reporting worse sightings than 2008. Thirty two percent reported better sightings than 2008.

YEAR	Much better	Better	About the same	Worse	Much worse	Not applicable	Total Responses
2009	6%	26%	66%	0%	0%	3%	35

3.2 Changes in Indicator Species

Each year, Wild Scotland asks about specific species in order to monitor changes. The most noticeable change in the data above is the number of respondents who noted a drop in minke whale numbers (10). Seven respondents noted a similar drop in basking shark sightings too.

4. Issues Arising...

Members were asked to raise any issues, local or national, that they felt were, or may affect their business (or the wildlife on which you depend). Some members provided more than one issue.

4.1 Positive Issues (n = 17)

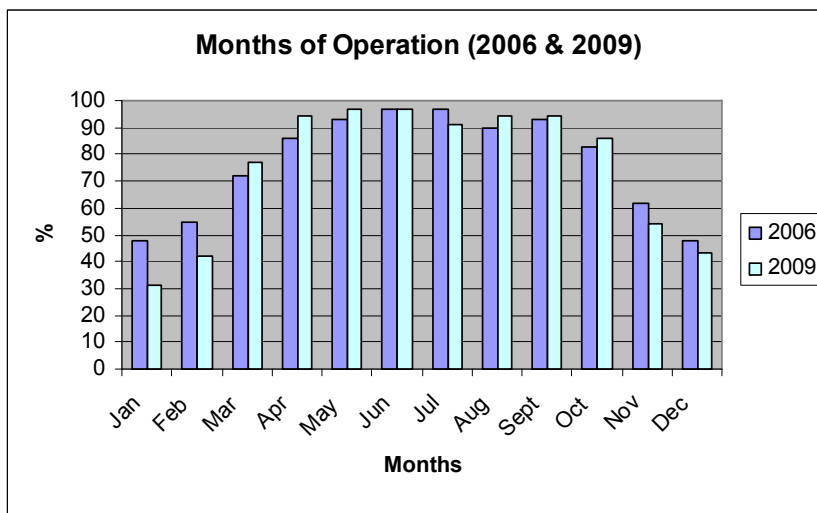
- Credit crunch: 2
- Weak pound: 3
- Increased awareness of wildlife watching in Scotland: 8
- Increase in wildlife numbers: 3
- More businesses working together: 1

4.2 Negative Issues (n = 20)

- Economy: 6
- Development issues: 7
- Wildlife disturbance: 2
- Growing number of operators: 2
- Other issues: 5

5. Seasonality

At least 30% of members are operating throughout the year, however the main season remains from April to October. The graph below shows the comparative data for 2006 and 2009 and shows that there is little difference over these three years in relation to the months over which wildlife tourism businesses operate. The only slight change is a drop in the number of members operating in January and February.



For further information regarding the survey or the full results (pdf version: £5.99), contact Wild Scotland 0845 226 0978 or info@wild-scotland.org.uk