



Wildlife Tourism in Scotland Insights into current research

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Overview



- The workshops will form part of the qualitative research.
- This presentation gives an outline of some themes for discussion.
- The research is ongoing and findings on the SWOT analysis will be available as part of the overall report.

Background to the research

- The Scottish Government commissioned a current assessment of the economic impacts of wildlife tourism across Scotland.
- Work began in earnest in April 2009 and is due to be completed in the new year.

The steering group:

- Raakhi Odedra (Analytical Services, BEE, Scottish Government) – Chair
- Caroline Woodhouse (Analytical Services, BEE, Scottish Government)
- Bob Henderson (Rural and Environment Analytical Services, Scottish Government)
- Sandra Dandie (Rural and Environment Analytical Services, Scottish Government)
- Richard Arnott (Promotion of Scotland and Tourism Division, Scottish Government)
- Samantha Kelly (Marine Strategy Division, Scottish Government)
- Caroline Warburton (Wild Scotland)
- Maren Ebeling (Scottish National Heritage)
- Margaret Legget (Scottish Enterprise)
- Jacqui Souter (Visit Scotland)
- Mairi Caldwell (Promotion of Scotland and Tourism Division, Scottish Government)

Elements of the research

The aim of the research is:

'to provide a robust assessment of the nature and net economic impact of the wildlife tourism market in Scotland, identifying key trends and opportunities for growth'.

The research strategy is designed to capture the behaviour and opinions of consumers and operators and is also designed to generate information on marine and terrestrial wildlife tourism across the geographical regions.

Quantitative surveys

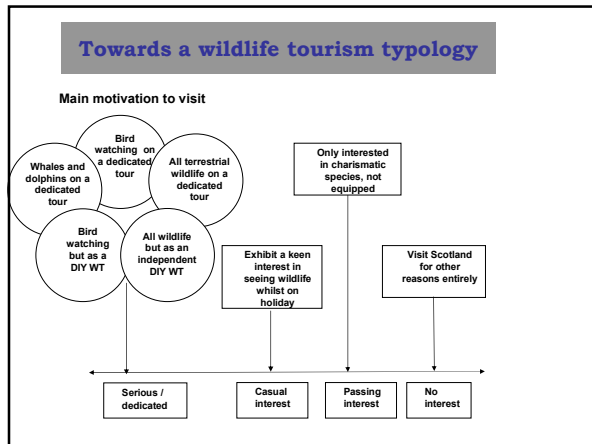
- * Postal survey of visitors to Scotland
- * on site self-completion survey distributed by wildlife tour operators
- * On-line operator survey


Qualitative research

- * Participant observation
- * Focus groups with non / lapsed visitors
- * In-depth interviews with operators
- * Industry workshop


Themes for discussion (Consumers)

- Not homogenous
- Casual wildlife watching / interest in wildlife.
- Wildlife plus scenery
- Wildlife watching as only one holiday activity
- Charismatic species
- * Independent wildlife watching
- Wildlife tourism 'trails'
- * VFR market
- * Post Spring and Autumn Watch phenomenon






Towards a typology of sorts



1. The experienced and knowledgeable who need very little intervention or assistance;
2. The fairly experienced but in need of direction, interpretation and signposting; and finally,
3. The novices who are relatively inexperienced who need help identifying locations that ensure positive experiences – i.e. the post Spring Watch WTs.

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Themes for discussion (Consumers)

- Wildlife tourism demand
- DIY wildlife travel +
- Choosing the destination
- Surfbird.com, Fatbirder, RSPB, Wildlife Trusts, tour leader's lectures, word of mouth and tourist board websites.
- The comparison of British wildlife experiences with competing destinations
- Influence of popular media / TV programmes

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Themes for discussion (Product)

- Wildlife tourism infrastructure
- The 'wildlife plus....' concept
- Suggested itineraries
- Providing unique and meaningful experiences -
 - ❖ Opportunities for creativity and diversification.
- Consumer expectations
- Obliging accommodation sector
 - ❖ The welcome
 - ❖ Complacency
 - ❖ Quality standards




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Themes for discussion (operators)

- ❖ Demand for wildlife tourism
- ❖ Changing focus on environment, conservation and climate change
- ❖ Carbon neutral / sustainable tourism products
- ❖ Transport infrastructure
- ❖ Grant aid and start-up schemes
- ❖ Political will and assistance
- ❖ Uncertain financial future
- ❖ Overcoming competing destinations




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Themes for discussion (Marketing and management)

- ❖ Strategic vision
- ❖ Destination marketing
- ❖ Joined up initiatives
- ❖ Marketing of Scotland
- ❖ Wildlife tourism and Visit Scotland website
- ❖ Working together
- ❖ Sharing good practice
- ❖ The management of wildlife tourism
- ❖ Avoiding disturbance



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Come and have your say: The Workshops

- The workshops this afternoon will give an opportunity to contribute to the qualitative research being undertaken:
 - **What is good about wildlife tourism in Scotland?**
 - **What is not so good? and most importantly,**
 - **What needs to happen to strengthen Scotland as a wildlife tourism destination?**
- There will be two groups one run by Deborah Benham who is working with us on the project and the other by myself. Each group will last approximately one and a quarter hours.