The Economic Importance of Wildlife Tourism to Scotland

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Wild Scotland
www.wild-scotland.co.uk
Marine Wildlife on West Coast: £1.8m/yr
(DEFRA, 2001)
Caperwatch, Loch Garten: £10s of 000s/yr
(RSPB, 2006)
Sea Eagles On Mull: £1.4 - £1.6 million/yr

(RSPB, 2006)
## Value of Nature-based Tourism

<table>
<thead>
<tr>
<th>Activity</th>
<th>Holiday trips (Thousands)</th>
<th>Spend (£m)</th>
<th>Avg spend per trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>1798</td>
<td>520</td>
<td>£289</td>
</tr>
<tr>
<td>Watching wildlife</td>
<td>429</td>
<td>159</td>
<td>£371</td>
</tr>
<tr>
<td>Adventure sports</td>
<td>253</td>
<td>66</td>
<td>£264</td>
</tr>
<tr>
<td>Mountain biking</td>
<td>98</td>
<td>14</td>
<td>£142</td>
</tr>
</tbody>
</table>

*UK Visitor Activities undertaken in Scotland 2008*
The Value of Wildlife Tourism

- £65m: net economic impact
  Bournemouth Uni/Scottish Government, 2010

- £276m: gross economic impact
  Bournemouth Uni/Scottish Government, 2010

- £127m: value of wildlife watching
  Bryden Associates/SNH, 2010
Bottlenose dolphins in Moray Firth, East Coast: £4m/yr

(REF: Aberdeen Univ, 2010)
The Wildlife Tourism Market

- Total of 1.12 million trips
- 56% are domestic (UK) tourists
- Total spend: £276 million
- 7.4% of all domestic tourism spend is primarily motivated by wildlife

Bournemouth University/Scottish Government, 2010
Traditional market:
- middle-aged, 'empty nesters', professional, middle-class couples who enjoy experiences in nature.
- predominantly English.
- members of environmental groups.

New markets:
- overseas visitors
- families
- domestic (Scottish) clients
- ‘new interest in wildlife’ instigated by either stage of life and/or television programmes, especially Springwatch.

The Typical Wildlife Tourism...
The Typical Wildlife Tourist…

Main motivation to visit

- Whales and dolphins on a dedicated tour
- Bird watching on a dedicated tour
- All terrestrial wildlife on a dedicated tour
- Bird watching but as a DIY WT
- All wildlife but as an independent DIY WT
- Only interested in charismatic species, not equipped
- Exhibit a keen interest in seeing wildlife whilst on holiday
- Visit Scotland for other reasons entirely

Serious / dedicated
Casual interest
Passing interest
No interest

Ref: S Curtin, Bournemouth Univ
The Impact of Wildlife Tourism

- Rural businesses
- Reasons for people to visit
- Year-round attractions
- Little infrastructure required
- Support other tourism businesses (accommodation / restaurants etc)
- Promote environmental awareness
- Sustainable/low impact form of tourism
Weaknesses & Threats

- Financial insecurity of businesses
- Business complacency
- Foreign competition
- DIY wildlife tourism
- Meeting visitor expectations
- Product deterioration
- Seasonality
- Access to suitable staff
- Perception of poor value for money
- Perception of poor service

- Built developments
- Infrastructure issues
- Lack of coherent strategy
- Lack of clear strategic leadership
- National level marketing
- Funding and support
- Government interest may be short-lived
- Weather
- Midges!

Bournemouth Uni/Scottish Government, 2010
Growing interest in wildlife & environment

Weak ££

Influence of TV programmes

Emphasis on value of guided experience

Access to market through internet and social media

‘Staycations’

Growth in family market

Growth in adventure travel

Growth of ‘activity + wildlife’ market
So, how is wildlife tourism doing?

The Industry…

• 61% said better was business than last year (18% increase on 2007)

• 57% saw increase in visitor numbers in 2009 (15% increase on 2008 figures)

• 57% saw change in their customer base; 62% saw increase in European visitors.

• Only 9% are working at full capacity

• WS members support 840 jobs (496 FTE) with collective turnover of £9.3m

How Was Your Survey 2009, Wild Scotland
Wild Scotland’s role

- Single point of contact
- Liaison with public agencies, in particular VisitScotland
- Collective working (advertising / QA)
- Representation
- Sustainable tourism / best practice
- Recognition as a credible industry
- Ear to the ground
Wild Scotland’s role

21% growth in membership (2008-2009)

• “associations such as Wild Scotland have really brought wildlife tourism to the fore to turn Scotland into the number one wildlife watching destination in Europe”.

• “Wild Scotland had been hugely important” and that “the overall quality of the wildlife tourist experience has improved and grown”.

Bournemouth Uni/Scottish Government, 2010