The Economic Importance of Wildlife Tourism to Scotland

Caroline Warburton
Wild Scotland
www.wild-scotland.co.uk


MICATO

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

	Holiday trips (Thousands)	Spend (£m)	Avg spend per trip
Walking	1798	520	£289
Watching wildlife	429	159	£371
Adventure sports	253	66	£264
Mountain biking	98	14	£142

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

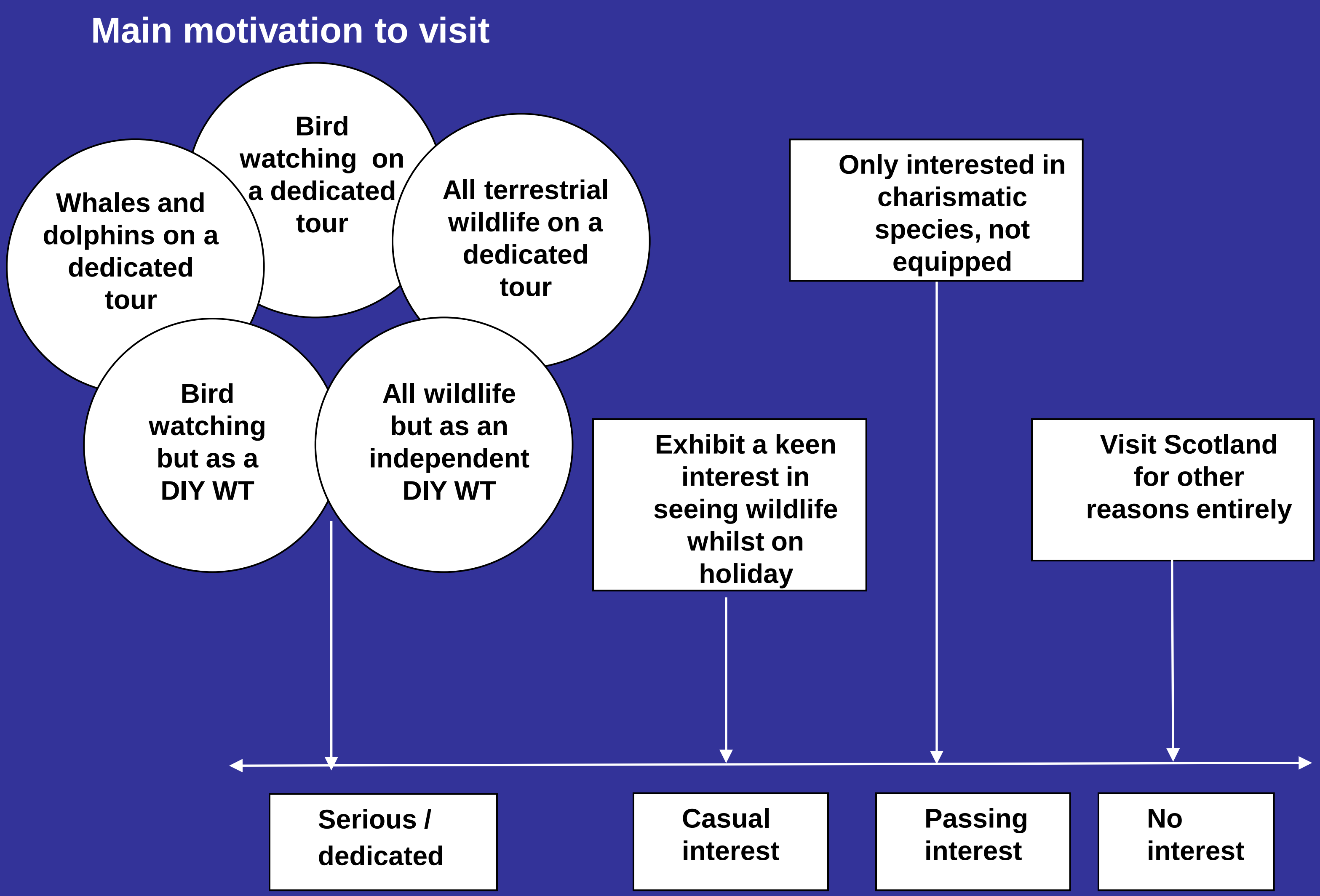
Bournemouth University/Scottish Government, 2010

The Typical Wildlife Tourism…

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 Tourist…



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

Opportunities

- 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

WILD SCOTLAND

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

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

WILD SCOTLAND

WILD SCOTLAND

Scottish Wildlife & Nature Tourism Operators Association

www.wild-scotland.org.uk