

## LONG HAUL TOURISM

## The EU market for wildlife travel

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**Report summary**

This CBI market survey discusses the following highlights for the EU market for wildlife travel:

- The growth of world tourism over the past two decades has been enormous. This growth is expected to continue to an estimated 1.6 billion international tourist arrivals in 2020. World tourism is forecasted to have grown by 4.6% in 2006 and by 4% in 2007. Wildlife travel is expected to show equally large growth. This is due to public concern over environmental issues and a corresponding interest in wildlife and its habitats.
- It is estimated that 20% - 40% of all international tourists have an interest in some form of wildlife watching.
- In general, the wildlife tourist has an average age of 43, travels with his/her partner, is from a higher socio economic group, is educated and active and has an interest in the environment. 52% of wildlife travellers are women.
- Due to demand for viewing new species and increased transportation possibilities, wildlife tourists are nowadays interested in seeing rare and/or endangered species of animals and birds that they cannot see at home. The more endangered a species is, the more people want to see it. There is an increasing demand for so-called 'see it before it's gone' trips.
- Wildlife tourism service providers in DCs are recommended to target specialised tour operators.
- Trade fairs, trade press, familiarisation trips and the Internet are the most important tools to reach target groups.

This survey aims to provide tourism suppliers of wildlife travel in developing countries (DCs) with product-specific market information related to gaining access to the EU market. By focusing on these EU markets for wildlife travel, this document provides additional in-depth information, complementary to the more general information and data provided in the CBI market survey 'The long haul tourism market in the EU', which can be downloaded from <http://www.cbi.eu/marketinfo>.

Detailed information on wildlife travel is given in appendix A. This survey discusses the EU in general and the following markets in particular: France, Germany, Spain, Sweden, the UK, and the Netherlands.

**1 Market description: Wildlife travel in the EU****Wildlife travel market**

Determining the size and scope of the wildlife travel market is difficult, due to a lack of empirical research. The growth of tourism over the past two decades has been enormous. This growth is expected to continue to an estimated 1.6 billion international tourist arrivals in 2020. World tourism is forecasted to grow by 4.6% in 2006 and by 4% in 2007. Wildlife travel is expected to show equally large growth. This can be seen in the number of different types of wildlife watching activities that have been developed and linked to commercial tourism, the number of tourism businesses that offer these activities and the number of tourists who engage in them. More and more tourism agents and operators are emphasising the need for tourism to be sustainable; they are developing and marketing tourism products that are 'wildlife-friendly' as well as carbon-neutral, and those which ensure that a fair share of tourist income goes to local people.

In some places, such as East Africa or the Galapagos Islands, wildlife has been the foundation on which their tourism has developed. In others, wildlife travel is a newer attraction that is helping to diversify tourism and to promote community development in remoter areas.

According to the International Ecotourism Society, 20% - 40% of all international tourists have an interest of wildlife watching in some form, ranging from casual observation of wildlife or short wildlife viewing excursions added to a trip undertaken for other purposes to tourists who spend their entire holiday on wildlife watching. Some experts estimate the market for wildlife tourism to be 7% of the world tourism market. The market is still small, but has a large growth potential.

The overall growth of wildlife travel is expected to be aligned with the growth rate of international tourism. In some areas, the growth of wildlife travel may be much greater. This growth will likely be a result of various factors including, but not limited to, the interest that many people have in wildlife, the prosperity of people in industrialised countries that enables them to travel to enjoy their interest in wildlife and the general desire amongst tourists to seek new experiences through tourism. The tourism industry is highly responsive to market demand and is likely to continue to develop tourism products to meet consumer interests in wildlife.

For information on the outbound long haul tourism market of the individual EU countries, please refer to the CBI country surveys for long haul tourism.

#### Most popular destination for wildlife travel

Africa is the prime destination for wildlife holidays. Many tour operators offer holidays featuring African national parks, game reserves and wildlife sanctuaries. Many African parks, such as the Masai Mara, Serengeti and Kruger are well-known throughout the world and a number of them have been recognised by both UNESCO (<http://www.unesco.org>) and the WWF (<http://www.wwf.org>) for their unique and important character. Wildlife sanctuaries in India are growing in popularity.

*Source: World Travel Atlas (2003) and interviews Facts Figures Future (2008)*

#### Segmenting the wildlife traveller

People's interests in wildlife are hugely varied, ranging from scientific study to entertainment, and they may change over time. Key factors in wildlife travel are: being able to experience animals in the wild; observing their 'natural' behaviour; and appreciating their beauty. Public attention tends to focus on species that are more easily observed- particularly larger species, that show extreme behaviour- such as predators, or that are symbolic, rare or exotic. Good guiding and interpretation can make any species interesting to the public and for tourists these aspects often form an important and memorable part of their wildlife travel experience. Species that are watched include not just larger species and birds, but also corals, fish, reptiles and insects.

Because wildlife watching covers a wide range of different species in different locations –some of which are easy to access, while others are difficult and costly to get to- the profiles of wildlife travel tourists depend very much on the type of activity and its location. One way of segmenting wildlife travellers is to consider the typology of international tourists who visit protected areas. Key attributes seen in the different groups of the segmentation are:

- Available budget
- Experience of travelling
- Requirement for comfort
- Preference for travelling alone or in small groups
- The degree of interest in local culture and nature.

Even though not all wildlife travel destinations are protected areas, Table 1.1 gives a concise view of traveller profiles for protected areas.

**Table 1.1 Segmentation of international tourists that visit protected areas**

Type of tourist	Main features
Explorer	Individualistic, solitary, adventurous, requires no special facilities. May be relatively well-off, but prefers not to spend much money. Rejects purpose-built tourism facilities in favour of local ones.
Backpacker	Travels for as long as possible on limited budget, often taking a year off between school/university and starting work.

Type of tourist	Main features
	Hardship of local transport, cheap accommodation, etc. may be required as travel experience. Understanding local culture is less important. Enjoys trekking and scenery, but often cannot visit remote areas to avoid high expenditures. Requires low-cost facilities.
Backpacker Plus	Often experienced travellers and generally in well-paid profession. More demanding in terms of facilities than Backpackers and with a higher daily spend. Genuine desire to learn about culture and nature and require good information.
High Volume	Often inexperienced at travelling, prefer to travel in large groups, may be wealthy. Enjoy superficial aspects of local culture and natural scenery and wildlife that is easy to see. Need good facilities and will only travel far if the journey is comfortable. Includes cruise ship passengers.
General Interest	May travel as free independent travellers on tailor-made itineraries with a tour operator and often prefer security and company of a group tour. Usually have limited time available for holiday. May be relatively wealthy, interested in culture, keen on nature/wildlife when not too hard to see. May be active and enjoy 'soft adventure' such as easy trekking and low-grade white water rafting. Dislike travelling long distances without points of interest. Need good facilities, although may accept basic conditions for short periods.
Special Interest	Dedicated to a particular hobby, fairly adventurous, prepared to pay to indulge hobby and have others take care of logistics. Travel as free independent travellers or groups. May have little interest in culture. Requires special facilities and services, e.g. dive-boats, bird-guides. Accepts discomfort and long travel where necessary to achieve aims. May have active involvement, e.g. environmental research project. Prefer small groups.

Source: UNEP/CMS - <http://www.unep.org> (2006)

The general increase in wildlife tourism will not only have its impact on areas where wildlife travel is already operating, but may also extend to remote areas as some tourists in the explorer and special interest segments seek new wildlife watching experiences.

The fact that tourists undertake trips for wildlife watching also creates opportunities to make them interested in other tourism activities, such as visiting other areas of the country to watch different species of wildlife or to see additional aspects of the country such as its heritage and culture. By providing additional opportunities for tourism, tourists can be encouraged to stay longer and spend more money in a country, having initially been attracted in order to view some of its wildlife.

### General wildlife traveller profile

Interviews with tour operators in the countries under discussion showed that there are no large differences between Dutch, French, German, British, Spanish and Swedish wildlife travellers. However, the following general wildlife travel consumer profile can be formulated:

- 52% are female, 48% are male;
- Age ranges between 10 and 95, with the average age of 43;
- Average travel party consists of 2 persons;
- The majority is travelling with a partner, 15% with friends and 15% with family groups;
- Belong to higher socio-economic groups;
- Are educated, active, interested in the environment;
- There is an overlap between wildlife enthusiasts and individuals interested in participating in walking, snow sports, cycling and outdoor culture related activities.

### Type of animals

An important issue for wildlife tourism is the varying level of attractiveness of different animals to humans. Surveys show that animals are perceived to be more attractive if they are mammals and birds, often domesticated animals that pose no threat to humans. The least attractive animals are those considered as being dangerous, dirty or frightening. One survey suggests that the attractiveness of different types of animals may vary along a number of continuums including one ranging from safe to dangerous and another measuring similarity to humans. Therefore, a saltwater crocodile would be considered as being fairly un-human and dangerous, a gorilla would be dangerous but human-like, while a dolphin could be regarded as being somewhat human-like and relatively safe.

The more endangered a species is, the more people want to see it. 'Rare' suggests something unusual, while 'endangered' suggests something is scarce. Together, both imply that the opportunity to interact with these animals is exceptional and unique and, thus, has a special significance.

Table 1.2 shows a general geographical overview of types of animals. Although this overview is not conclusive and rather general, it does give an idea of the interests of wildlife tourists visiting these areas.

**Table 1.2 General geographical overview of species**

Geographical area	Species
Africa	'the Big 5' (lion, African elephant, African buffalo, rhinoceros, leopard), silverback gorillas
Arctic areas	Penguins, polar bears, seals, walrus, whales
Asia	Elephants, birds, marine life, pandas, tigers
Caribbean	Marine life
Europe	Bears, beavers, birds of prey, capricorns, deer, elks, wolves
Indonesia	Orang-utans
Middle America	Marine life
North America	Bears, 'big cats', birds of prey, bison, caribou, deer, elks, wolves
Oceania	Marine life
South America	Alpacas, birds, iguanas, llamas, marine life, penguins

### Quality aspect of the experience in wildlife travel

There are several aspects which influence the experienced quality of the wildlife watching trip. Aspects such as the natural behaviour exhibited by the wildlife, the uniqueness of the wildlife watching experience and the popularity of the wildlife influence the quality of wildlife watching. Species which are rare or endangered hold a special attraction. Other factors which influence the popularity of species are physical attractiveness, size, danger and drama. The attention given to species in TV programmes and magazines also influences their popularity. Wildlife tourists would like to experience something unique. The sense that the experience is special and unusual and that the wildlife tourist is privileged in seeing the wildlife is very important for their quality perception of wildlife travel. The duration of the wildlife watching tour is also very important. The experience is heightened up to a certain point, but then the wildlife tourist may become saturated with it.

It is important to design the experience so that a perception of quality is maintained even if a certain unreliable element of the experience is missing, as may often be the case in wildlife tourism. Effective interpretation is very important to sustainable wildlife tourism. Interpretation involves 'translating the technical language of a natural science or related field into terms and ideas that people who are no scientists can readily understand' in a way that is entertaining and interesting. It involves more than just simply presenting customers with facts. The way the information is communicated is equally important. Effective interpretation can lead directly to an increase in customer satisfaction:

- By providing interpretative content, which in itself is interesting and enjoyable and also effectively supplements the physical experience.
- By encouraging a feeling of wonder and excitement when wildlife is encountered.



Effective interpretation can also lead to enhanced support for conservation of the wildlife that is being viewed. Studies have shown that seeing animals in combination with interpretation that was designed to raise conservation awareness is associated with increased support by visitors for the conservation of those species.

In order to ensure that wildlife populations persist, and that animals can continue to be approached for viewing, wildlife tourism operators generally need to offer tourism activities that have a minimal impact on the environment and the animals. The aim of this should be to ensure that as a result of tourism activities, the population does not experience increased mortality, reduced reproductive success, emigration from the area (all contributing to a population decline in the area), or increased avoidance of tourists. An example of these minimal impact practices is guidelines on how boats for whale watching trips should be managed in the vicinity of whales. These include restrictions regarding: approach distances, boat speed, use of gears, number of boats within a certain distance of the animals and the amount of time that they spend there. They may also include restrictions on the types of animals that should be approached closely (e.g. calves). In the case of swim tours, they may also include restrictions on the number or behaviour of visitors in the water in the proximity of the whales. Minimal impact practices can maintain or even enhance customer satisfaction:

- By providing 'substitute' experiences (e.g. video, interesting discussion) when the 'real' experience is not available.
- By explaining to customers why minimal impact practices are necessary and winning their support for these practices even if it means less intimate encounters with wildlife (making this a positive fact, by showing that the operator and the customers are being environmentally responsible).
- By influencing customer expectations, so they know that they will be especially privileged if they have a close encounter with the wildlife (reducing disappointment if this does not happen and enhancing excitement if they do).

Tourism research has shown that customer satisfaction is influenced to a large extent by whether the experience matches prior expectations. It is thus important that the message (whether in images, spoken, or written) raises realistic expectations of the wildlife tour experience, especially in relation to any unpredictability of sightings.

Table 1.3 shows the factors which lead to the best and worst experiences with wildlife tourism.

**Table 1.3 Factors leading to the best and worst experiences with wildlife**

Captive animal encounters		Free animal encounters	
Best experiences	Worst Experiences	Best experiences	Worst Experiences
See live animals previously only seen on photos or on TV Educational/ learned new things Get close to animals/ touch/ feed Well kept animals/ space for animals Aspects of the natural environment	Dirty cages/ small cages/ inappropriate  Boring  Animals appear unhappy Animals badly treated  Animal was threatening/attacked	Be in natural environment/ beautiful scenery See animals close up/ get close See a variety of animals  Interesting/educational  Being in animal's world/ in the wild/ not a staged experience	Weather/ illness/ other reasons beyond operator control Saw no or few animals  Animal was threatening/ attacked Boring  Staged experience

Source: Woods (1999)

### Sustainability and preservation key to wildlife travel

Wildlife travel should be sustainable and should protect the wildlife, its habitat and the communities on which it depends. To be sustainable, tourism needs to make a positive contribution to the natural and cultural environment, generate benefits for the host communities, protect the future livelihood of local people and strive to anticipate and prevent economic, environmental, social and cultural degradation. While tourism is expanding, there are limits on how many visits animal populations can sustain. Wildlife travel needs to be

controlled, so that tourists can enjoy high-quality wildlife watching practices without damaging the survival of animals they watch, or their habitat. This means setting firm limits, established through impact assessments, on numbers of tourists, on tourism development and on the ways in which wildlife watching is conducted so as to minimise the disturbance it causes to wildlife.

Wildlife travel needs careful preparation and management by the tourism sector, conservation managers and governments, in order to avoid undesirable effects on wildlife and local communities. Problems that can arise include overcrowding and excessive disturbance, which besides damaging animal populations also reduces the quality of the tourist's experience and the economic benefits for local communities or for conservation. Groups must be small for wildlife travel. Diving trips to see the underwater wildlife world, for example, usually need at least 10 people to break even, but fewer than 25 for safety and aesthetic reasons. Successful wildlife travel may generate non-monetary benefits that can include valuable political and government support for species conservation, as well as support from local communities and key stakeholders and public awareness of the significance of wildlife in the national heritage.

#### Ecological impact from disturbance

There are three learned behavioural responses that wildlife may show in response to disturbance by tourists: habituation, attraction and avoidance. These reactions are the behavioural strategies that animals employ to survive. Habituation is the learned lack of response to humans to the point of apparently ignoring their presence. Attraction is the strengthening of an animal's behaviour through rewards or reinforcement. Avoidance includes hiding or fleeing, playing dead or aggression and an aversion to negative consequences. All three responses can lead to negative outcomes for wildlife species, populations and communities. These negative outcomes must be avoided, so your company and your services will have a long lasting, sustainable success. Table I shows examples of the ecological impact from disturbance by wildlife tourism.

**Table I** Examples of ecological impact from disturbance by wildlife tourism

Characteristic	Description	Example of species
Lowered productivity	Reduced fecundity rate, reduced survival rate of young	Reproduction decline of green sea turtles in Costa Rica. Brown pelican eggs eaten by predators.
Disturbance of feeding	Decreased foraging	Cheetahs in Kenya disturbed during 'kills'. Giant otters disturbed during day time feeding.
Reduced use of preferred habitat/refuge areas	Wildlife related to less suitable habitat, not using refuge to full advantage	Northern royal albatross moved nesting sites.
Psychological & behavioural change	Stress or change in behaviour	Presence of tourists can stress primates and cause long term behaviour modifications. Breeding Magellanic penguins in Argentina experience stress. Change in behaviour of humpback whales.

Source: Rodger, K.J., 2007, *Wildlife tourism and the natural sciences: Bringing them together* -Murdoch University - <http://wwwlib.murdoch.edu.au> (2007)

#### Trends

This section will discuss the major trends that influence wildlife travel.

##### **Growing wildlife market due to public concern**

The wildlife market is expected to grow significantly, due to growing interest in wildlife and its habitats fuelled by public concern over environmental issues. Growth is expected to be particularly strong in marine wildlife, touring and guided wildlife.

##### **Demand for viewing rare species**

Wildlife tourism used to rely on species that were easy to view in environments that were easy to access. However, due to increased transportation possibilities and a demand for viewing new species, wildlife tourists are nowadays increasingly interested in seeing rare species of animals and birds that they cannot see at home. There is a sense that many places and wildlife which are being taken for granted are disappearing and more and more tourists go on so-

called 'see it before it's gone' trips.

### ***Environmental responsibility***

Travellers are becoming more environmentally responsible and asking airlines, hotels and tourism suppliers to become so as well. Sustainable tourism attempts to make a low impact on the environment and local culture, while helping to generate income and employment for locals, as well as to promote the conservation of local ecosystems. So-called 'sustainable travellers' are willing to spend on average 10% more for travel services and products provided by environmentally responsible tourism suppliers.

The CBI market survey 'The EU Market for Community-Based Tourism' contains this discussion at a European level. This survey can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

### ***Increased media coverage***

Wildlife tourism is being stimulated by wildlife documentaries, extensive destination advertising, travel literature, greater communication through the Internet and word of mouth. This widespread media coverage of the natural world is leading to an increased demand for wildlife travel.

### ***High value, low volume destinations***

In the face of growing demand, more countries with fragile and limited resources are deciding that the best way to preserve what they have is to charge high admission prices. For example, wildlife watching in Botswana, Africa is becoming extremely expensive. As a result, these destinations are receiving high value, but lower volume tourists.

### ***Wildlife watching cruises***

In recent years, ocean cruises have been the largest growing sector of the holiday market. There is an increasing demand for cruises aimed at wildlife watching which offer opportunities to watch and photograph birds, mammals and reptiles.

### ***Growing demand for short wildlife watching trips***

There is an increasing demand for short wildlife watching trips. Wildlife trips that can be enjoyed over the weekend are becoming very popular. For example, bear watching over a long weekend in Central Europe is increasing in popularity. Short haul destinations are more popular for short wildlife watching trips than long haul destinations.

### ***Opportunities and threats***

Trends and market developments offer opportunities and threats to DC tourism suppliers. A given trend can be a threat to some and an opportunity to others at the same time. Therefore, the following opportunities and threats should always be analysed in relation to your specific circumstances.

- + The growth in international tourism is expected to grow to an estimated 1.6 billion international tourist arrivals in 2020. The overall growth of wildlife travel is likely to continue at least in line with the growth rate of international tourism.
- + 20%- 40% of all international tourists have an interest in some form of wildlife watching.
- + The widespread media coverage of the natural world leads to an increased demand for wildlife travel.
- + The increasing demand for unique experiences, seeing new things and species and the popularity of 'see it before it's gone' trips, offers interesting opportunities to wildlife tourism suppliers in DCs.
- +/- The growing demand for short wildlife watching trips offers interesting opportunities for tourism suppliers in DCs who are relatively close to Western Europe and fewer opportunities for tourism suppliers in DCs who are relatively far away from Western Europe.

- +/- Good organisation of the wildlife watching trip is required before a tourism supplier can offer good quality wildlife watching trips. Sustainability can impact volumes of visits and can increase costs of delivering wildlife watching experiences. These experiences may be limited by governments or preservationists who want certain areas or species untouched.

Please refer to chapter 5 of the CBI market survey covering the long haul tourism market in the EU for more information on opportunities and threats. This survey can be downloaded at <http://www.cbi.eu/marketinfo> - go to search CBI database.

### Useful sources

- CRC Sustainable Tourism - <http://www.crctourism.com.au> – several interesting reports, such as 'International market analysis of wildlife tourism', 'Principles for sustainable wildlife tourism, with particular reference to dolphin-based boat tours in Port Philip Bay' and 'Classifying wildlife tourists'.
- UNEP/CMS - <http://www.unep.org> - Wildlife watching and tourism. A study on the benefits and risks of a fast growing tourism activity and its impacts on species.
- World Travel Atlas - <http://www.worldtravelatlas.co.uk>

## 2 Trade channels for market entry

### Trade channels

Holidays and trips can reach the final consumer in various ways. The trade channels for the long haul tourism market are inbound tour operators (local agents), outbound tour operators and travel agencies. In addition to consumers who will book at tour operators and travel agencies, there is a small group who will turn to modular self arrangements for travel and shop around for best buys. This section will only discuss the outbound tour operators who specialise in wildlife travel. The other important trade channel, 'inbound tour operators', is discussed in further detail in the CBI country surveys on long haul tourism. Tour operators who dominate smaller markets, specific destinations or activities are so-called specialised tour operators and are usually small or medium sized. Tourism service providers in DCs are recommended to target specialised tour operators. Specialised tour operators use both their own network and travel agencies for selling and most of their clients are individuals. Many tour operators offer a portfolio of products at different destinations. They do not necessarily maintain an operational base at each of their destinations. Most are retail packages which are sold by a range of local tour operators to an international clientele. There are also tour operators who offer similar products or activities at multiple destinations. Table 2.1 shows examples of wildlife tour operators in the Netherlands, France, Germany, the UK, Sweden and Spain.

Please refer to the CBI EU survey and country surveys on long haul tourism for a discussion of trade channels for long haul tourism in general. These surveys can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

**Table 2.1 Examples of wildlife tour operators in the Netherlands, France, Germany, the UK, Sweden and Spain.**

Country	Tour operator	Website
the Netherlands	Birding Breaks	<a href="http://www.birdingbreaks.nl">http://www.birdingbreaks.nl</a>
	Eco Tourist Services	<a href="http://www.ecotouristservices.nl">http://www.ecotouristservices.nl</a>
	Olaf Reizen	<a href="http://www.olafreizen.nl">http://www.olafreizen.nl</a>
	Sundowner	<a href="http://www.sundowner.nl">http://www.sundowner.nl</a>
	Thika Travel	<a href="http://www.thikatravel.com">http://www.thikatravel.com</a>
France	Destination Nature	<a href="http://www.destinationnature-gt.com">http://www.destinationnature-gt.com</a>
	Objectif Nature	<a href="http://www.objectif-nature.com">http://www.objectif-nature.com</a>
	Vie Sauvage	<a href="http://www.viesauvage.fr">http://www.viesauvage.fr</a>
Germany	Voyages pour la Planete	<a href="http://www.voyagespourlaplanete.com">http://www.voyagespourlaplanete.com</a>
	Amarula Safari	<a href="http://www.amarula-safari.de">http://www.amarula-safari.de</a>
	Iwanowski's Individuelles Reisen	<a href="http://www.afrika.de">http://www.afrika.de</a>
	Safari Afrika	<a href="http://www.safariafrika.de">http://www.safariafrika.de</a>



Country	Tour operator	Website
UK	Travel2Gambia	<a href="http://www.travel2gambia.de">http://www.travel2gambia.de</a>
	Heatherlea	<a href="http://www.heatherlea.co.uk">http://www.heatherlea.co.uk</a>
	Limosa	<a href="http://www.limosaholidays.co.uk">http://www.limosaholidays.co.uk</a>
	Nature Trek	<a href="http://www.naturetrek.co.uk">http://www.naturetrek.co.uk</a>
	Tribes Travel	<a href="http://www.tribes.co.uk">http://www.tribes.co.uk</a>
	Wildlife Trails	<a href="http://www.wildlifetrails.co.uk">http://www.wildlifetrails.co.uk</a>
Sweden	Wildlife Travel	<a href="http://www.wildlife-travel.co.uk">http://www.wildlife-travel.co.uk</a>
	AviFauna	<a href="http://www.avifauna.se">http://www.avifauna.se</a>
	Globetrotter	<a href="http://www.globetrotter.se">http://www.globetrotter.se</a>
	Kenzan Tours	<a href="http://www.kenzantours.se">http://www.kenzantours.se</a>
	Penguin Travel	<a href="http://www.penguin.se">http://www.penguin.se</a>
Spain	Tour Africa	<a href="http://www.tourafrica.se">http://www.tourafrica.se</a>
	Catai	<a href="http://www.catai.es">http://www.catai.es</a>
	Club Marco Polo	<a href="http://www.clubmarcopolo.es">http://www.clubmarcopolo.es</a>
	Pasaporte a la Aventura	<a href="http://www.pasaporte3.com">http://www.pasaporte3.com</a>

Source: Facts Figures Future (2008)

### A real life case

The French tour operator Objectif Nature is specialised in safari, animal and photo holidays. New destinations should offer these three specialisations. They publish their new brochure in February, so tourism suppliers must be aware that negotiations must be finalised before July. Objectif Nature works a lot with local offices to arrange, among other things, safaris, hotels and transportation. Local tourism suppliers are recommended to work closely with local inbound tour operators and agents. These local bureaux offer a range of free industry benefits, exclusive advertising opportunities as well as the chance to participate in specific domestic and international cooperative marketing activities. Most tourism suppliers are visited by the product manager of Objectif Nature, as the tour operator wants to check the operations itself. A high service level is always an important criterion. Participating in tourism fairs can be convenient, but does not always guarantee good business. Objectif Nature thinks that local agents are more appropriate for contacting new tourism suppliers.

Source: Interviews Facts Figures Future (2008)

## Commissions

For an overview of the commissions of travel agents and tour operators, please refer to table 2.2. These percentages are only an indication and may fluctuate per organisation.

**Table 2.2 Commissions travel agents and tour operators**

Country	Margin travel agent	Margin tour operator
France	12-17%	20-30%
Germany	13%	20-30%
the Netherlands	5-10%	20-30%
Spain	10%	20-30%
Sweden	10%	20-30%
UK	10%	20-30%

Source: Facts Figures Future (2008)

## Selecting a suitable trading partner

There are many ways to find potential trading partners in Europe. In this section, the focus will be on country specific sources, the Internet and sources in your own country. Please refer to Section 5 for the main sales promotion tools.

### Country specific sources

- Aitco - <http://www.aito.co.uk> – this British website gives an overview of British wildlife watching tour operators - click on 'holiday themes', on 'adventure, wildlife & nature' and then on 'safaris, wildlife & nature'.
- Birdtours - <http://www.birdtours.co.uk> – this British website shows tour operators specialised in bird watching.
- Bugbog- [http://www.bugbog.com/tours/various/wildlife\\_safaris.shtml](http://www.bugbog.com/tours/various/wildlife_safaris.shtml) - this website gives an overview of wildlife watching tour operators (worldwide).

- EchoWay – <http://www.echoway.org> – French association for ecotourism and sustainable tourism – click on 'Ou partir?'.
- Natuur startpagina - <http://natuur.startpagina.nl> – click on 'Natuurreizen' for an overview of Dutch nature and wildlife watching tour operators.
- Responsible Travel - <http://www.responsibletravel.com> – click on 'Wildlife holidays' for an overview of British wildlife travel tour operators.
- Swedish Travel Agencies Association - <http://www.srf-travelagent.se> – click on 'List of members' for an overview of Swedish tour operators. Some of these tour operators offer wildlife travel.
- Tourisme Autrement - <http://www.tourisme-autrement.com> - click e.g. on 'Destinations exotique' for an overview of French tour operators. Some of them offer wildlife travel.
- Verträglich Reisen - <http://www.vertraeglich-reisen.de> – click on 'Reiseveranstalter und Reisebüros' and 'Naturerlebnisreisen' for an overview of German wildlife travel tour operators.
- VPR - German association for International Tour operators - <http://www.vpr.de> – click on 'mitglieder' and then on 'ordentliche' for an overview of German tour operators. Some of these tour operators offer wildlife travel.
- Webviajes - <http://www.webviajes.com> – gives an overview of Spanish tour operators (mayoristas) and travel agencies (minoristas).

Please refer to the CBI country surveys on long haul tourism for an overview of country specific sources. These surveys can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

### **Internet**

Some examples of available general sources to find clients:

- Europages – <http://www.europages.com> – Click on 'Travel, Tourism and Leisure'.
- Kellysearch - <http://www.kellysearch.com> - Type 'Leisure and hospitality' in the Find It box and select Europe.
- Kompass – <http://www.kompass.com> - The free part is useful in finding tour operators.

### **Your own (DC) country**

Some examples of sources which may be available in your own country:

- Diplomatic and consular representatives. These can be found at <http://www.embassyworld.com>.
- The consul of your country in the target country
- Public and private trade promotion bodies

#### **Ezemvelo KZN Wildlife, South Africa**

KZN Wildlife is fully aligned with the South African and International Travel Trade. It has a data base of nearly 2,000 wholesalers and retailers who regularly provide business to KZN Wildlife. KZN Wildlife is in step with the policies and commission structures applicable in the industry. It is a full member of the South African Tourism Services Association - thus adhering to strict codes of conduct as well as assuring its clients of internationally accepted insurance and liability covers. Its marketing efforts are seen both locally and abroad, with regular representation on the major consumer shows in the country as well as local retail workshops. The World Travel Market in London and the I.T.B in Berlin are attended annually where visitor facilities and protected areas of KZN Wildlife are marketed to the world travel industry. Other shows and workshops are attended in Belgium and the Netherlands. Clients from 27 countries are attracted to the diversity of KZN Wildlife's tourism facilities, and the travel industry accounts for reservations at most of its major protected areas, from the Ukhahlamba Drakensberg Park, to the Greater St Lucia Wetland Park and in the game parks such as Hluhluwe Umfolozi Park with its unique Wilderness Trails.

Source: <http://www.kznwildlife.com>

### 3 Increasing your service level

Local hosts should offer the following facilities to wildlife watchers:

- Information, including wildlife finding guides, up-to-date checklists with seasonal and habitat abundance information, a daily wildlife watching log and educated interpreters with knowledge about local specialities and rarities.
- Good accessibility via roads, trails, boardwalks, blinds, boats and so on.
- Amenities including bathroom, drinks, food, lodging, shade, escape from insects and extreme temperatures.
- Value for money

The best ways of gaining the attention of wildlife tourists are by creating wildlife festivals, wildlife watching trails and wildlife guides and articles focusing on rare or local species, unusual congregations of animals and unusually good viewing opportunities.

Here are some suggestions for making communities more 'wildlife watcher friendly':

- Establish wildlife watching corridors;
- Provide checklists and detailed maps on animal hotspots in local areas;
- Enlist groups to sponsor wildlife feeders and viewing platforms;
- Enlist local wildlife watchers as host contacts to visitors;
- Post 'current sightings' and similar information on the Internet;
- Publish a list of places that are open early and late where gas, coffee, water, lunches, breakfast, film, batteries, sunscreen, bug repellent, hats, waterproof clothing, footgear and binoculars can be bought and where equipment repairs can be made;
- Welcome wildlife watchers with street signs, banners and festivals;
- Encourage motels and restaurants to have 'early birders specials' and weekend packages;
- Host information sessions and field trips for local officials on the importance of wildlife watching.

Well selling wildlife watching trips have the following characteristics:

- Long weekend (4 or 5 days);
- Minimal travel time (direct flight);
- Comfortable transfers (with optional coffee break enroute);
- Comfortable three-star accommodation;
- Optional extras, such as (guided) bird watching and looking for wildlife tracks;
- Presentations on wildlife;
- Information package about wildlife and wildlife watching.

Making the wildlife watching hide more comfortable can be done by:

- Comfortable reclining chairs
- Good visibility of wildlife
- Possibilities for photography
- Clean toilet
- Books and other information on wildlife
- Binoculars
- Mosquito proof

#### Useful Sources

- Ronald Loriaux – <http://www.mek.fi> - Product Development Seminar
- South Carolina Tourism Report Series - <http://www.scprrt.com> – Birding and Other Wildlife Watching

## 4 Price developments

### Prices travel packages

The strong Euro is playing a major role in favour of outbound tourism. For this reason, travelling abroad is more attractive for Europeans and this favourable situation is expected to continue for some time. In Europe, tour operators are conducting a price war. High numbers of last-minute bookings and the increase in direct sales without intermediaries have put operator margins under pressure. Higher fuel prices in recent years have only partly been passed on to the consumer and several cost reductions have been necessary in order to remain competitive. Tour operators are not open about the purchasing prices they pay for the tourism services they offer. To give an indication of the prices for wildlife travel packages to DCs sold by European tour operators, some examples of consumer prices are presented in Table 4.1. Please note that this is an indication of consumer prices only. Prices may fluctuate during the year, per tour operator, per country and per destination.

**Table 4.1 Examples of travel packages of European wildlife tour operators, 2008**

Destination	Character	Length (days)	Price (€)	Website of tour operator	Country of origin of tour operator
Borneo	Watching Orang-utans and Oriental Pied Hornbills	14	3,475	<a href="http://www.birdingbreaks.nl">http://www.birdingbreaks.nl</a>	The Netherlands
Chile	Watching different species	14	3,500	<a href="http://www.destinationnature-gt.com">http://www.destinationnature-gt.com</a>	France
Botswana	Watching elephants	14	1,790 – 1,890	<a href="http://www.afrika.de">http://www.afrika.de</a>	Germany
India	Watching tigers	14	2,470 – 2,780	<a href="http://www.naturetrek.co.uk">http://www.naturetrek.co.uk</a>	UK
Kenya and Zanzibar	Watching different species	14	2,730	<a href="http://www.kenzantours.se">http://www.kenzantours.se</a>	Sweden
Uganda and Rwanda	Watching gorillas	18	2,465	<a href="http://www.pasaporte3.com">http://www.pasaporte3.com</a>	Spain

Source: Facts Figures Future (2008)

### Air fares

A substantial portion of the price of a travel package is the air fare. Both air fares and hotel rates are expected to increase. This section will discuss the expected price increases of air fares and hotel rates in further detail.

#### Global Air Fare Forecast

Air fares are expected to climb, although low cost carrier penetration will offset the increase in global air fares somewhat. More passenger traffic and higher oil prices will be compensated by continued low-cost carrier growth, increased capacity on high traffic routes and competitive fare structure changes. Table 4.2 shows the increase of European air fares for 2007.

**Table 4.2 Increases in European Air Fares, 2007**

Published Air Fares	Increases for 2007
Domestic / short haul (economy fares)	0% to 2%
International / long haul (business fares)	2% to 3%

Source: Traveldailynews (<http://www.traveldailynews.com>)

#### Global Hotel Rate Forecast

Due to enormous demand for hotels across all regions, hoteliers have more control over negotiations, with few downward pressures available to stabilise pricing. Rates will go up as a result of rising occupancy, limited supply growth and competition between leisure and business travellers. The increased demand for hotel rooms will surpass the growth rate of air capacity. Table 4.3 shows the increases of hotels rates for 2007.



**Table 4.3 Increases in hotels rates, 2007**

Region	Hotel Mid-Range Properties Increases for 2007	Hotel Upper-Range Properties Increases for 2007
Asia-Pacific	0% to 25%	-1% to 25%
Europe, Middle East and Africa	2% to 5%	3% to 6%
Latin America & the Caribbean	2% to 4%	4% to 7%
North America	2% to 6%	3% to 8%

Source: Traveldailynews (<http://www.traveldailynews.com>)

BCD Travel Consulting (<http://www.bcdtravelinmotion.com>) even expects hotel rates in the Asia-Pacific region and in particular in India to grow by 14% to 17% in 2008, as demand continues to be larger than supply. For the Latin American region, it is expected that hotel rates will increase by 13% to 16% in 2008. BCD Travel Consulting forecasts that average group room rates will increase by 6% to 9% in 2008. Food and beverage costs are expected to increase by 7%. The costs of arranging a meeting are expected to increase by 8% to 10% in 2008.

Please refer to the CBI market survey 'The long haul tourism market in the EU' for more information on prices and price developments. This survey can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

## 5 Doing business

General information on doing business such as approaching potential business partners, building up a relationship, drawing up an offer, handling the contract (methods of payment, and terms of delivery) can be found in CBI's export manuals 'Export Planner' and 'Your image builder'. Furthermore, cultural awareness is a critical skill in securing success as an exporter. Information on cultural differences in the EU can be found in chapter 3 of CBI's export manual 'Exporting to the EU'. These manuals can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

### Sales promotion

There are numerous tools to promote a destination, accommodation or country among target groups. Trade fairs, trade press, familiarisation trips and the Internet are the most interesting tools to reach target groups such as specialised tour operators and wildlife travellers. There is a strong trend towards cross marketing between wildlife tourism products and other products purchased by the same consumers. These links are made through magazines, mail-outs, inserts, Internet websites, television, films, fashion, shops and merchandising.

### Trade fairs

Trade fairs are important tools for DC operators to get in touch with potential counterparts. Many potential buyers are present and looking for new business suppliers and initial contact can easily be established. Besides tour operators, a lot of journalists visit these fairs and making contact with them could result in free publicity. There are no trade fairs which focus specifically on wildlife travel. However, the general tourism fairs will also pay attention to wildlife travel and are thus interesting for wildlife tourism suppliers as well. Table 5.1 shows the most important European travel fairs.

**Table 5.1 Most important European travel trade fairs**

Trade fair	Website	Place	Date
FITUR	<a href="http://www.fitur.ifema.es">http://www.fitur.ifema.es</a>	Madrid, Spain	January
ITB	<a href="http://www.itb-berlin.com">http://www.itb-berlin.com</a>	Berlin, Germany	March
Le Monde à Paris	<a href="http://www.lemondeaparis.com">http://www.lemondeaparis.com</a>	Paris, France	March
Vakantiebeurs	<a href="http://www.vakantiebeurs.nl">http://www.vakantiebeurs.nl</a>	Utrecht, the Netherlands	January
World Travel Market	<a href="http://www.wtmlondon.com">http://www.wtmlondon.com</a>	London, UK	November
TUR	<a href="http://www.tur.se">http://www.tur.se</a>	Gothenburg, Sweden	March

Source: Facts Figures Future (2008)

For an overview of regional tourism fairs in the individual countries, please refer to the CBI country surveys on long haul tourism. These surveys can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

### **Trade press and consumer magazines**

Trade press and consumer magazines are very important for DC operators, as they could provide them with free publicity on their country and/or destination, influencing potential trade partners and consumers. The CBI export guidelines 'From survey to success' give advice on how to approach the European press and how to write a press release.

These are the main nature and wildlife travel magazines in the EU. Most nature magazines feature articles on wildlife travel as well.

- BBC Wildlife Magazine - <http://www.bbcwildlifemagazine.com>
- Camera Natura - <http://www.cameranatura.se> – Swedish magazine on nature photography
- Ecologist Magazine – <http://www.theecologist.org> – British magazine on environmental affairs
- Geographical – <http://www.geographical.co.uk>
- Grasduinen - <http://www.grasduinen.nl> – Dutch flora and fauna magazine
- National Geographic - <http://www.nationalgeographic.com>
- Naturblick - <http://www.1a-grafiks.de/Naturblick.html> - German magazine on travel and nature photography
- Quercus - <http://www.quercus.es> – Spanish magazine on nature travel
- Rainforests - <http://www.naturealert.org>
- Süd Afrika - <http://www.latka.de/zeitschriften/sued-afrika-magazin.htm> - German magazine on South Africa
- Travel with a challenge - <http://www.travelwithachallenge.com>
- Vår Fågelvärld - <http://www.sofnet.org> – Swedish magazine on birds and bird watching
- Verträglich Reisen - <http://www.vertraeglich-reisen.eu> – German magazine on environment- friendly travel
- Wildlife Extra – <http://www.wildlifeextra.com> – British magazine on wildlife watching

It might also be interesting to look at local magazines. Examples are Encounter Africa (<http://www.encounter.co.za>), Travel Africa Magazine (<http://www.travelafricamag.com>) and Wildside (<http://www.wildsidesa.co.za>).

Please refer to the CBI country surveys on long haul tourism for an overview of travel magazines in the individual countries. All these magazines feature articles on wildlife travel every now-and-then, but the magazines are not entirely devoted to wildlife travel. These surveys can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

It is recommended that you visit the website of the European Travel Press (<http://www.eurotraveljournalists.org>) to find the most updated information on European travel writers (select 'who').

### **Internet portals**

Internet portals are very important nowadays. Many consumers search the Internet for ideas and inspiration for their holidays. DC operators could use these internet portals to gain free publicity on their country, destination and/or activity. The following are some internet portals focused on wildlife travel:

- ARKive - <http://www.arkive.org> – video's and pictures of endangered species can be added
- Fåglar - <http://www.pp.hogia.net/bengt.stridh/fagellankE.html> - Swedish website on bird watching
- Indian Wildlife Club - <http://www.indianwildlifeclub.com>
- India Wildlife Resorts - <http://www.indiawildliferesorts.com>
- Lonely Planet - <http://www.lonelyplanet.com/travelstories/interest/wildlife>
- Real Travel - [http://realtravel.com/wildlife\\_viewing-z1090372.html](http://realtravel.com/wildlife_viewing-z1090372.html)
- Wildlife Travel - <http://www.wildlifetravel.net>

### Television

As stated before, wildlife watching is increasingly being covered in the media, among others by television. Featuring your destination or your service on the television is a great opportunity for gaining publicity. Interesting European stations are:

- Animal Planet - <http://animal.discovery.com>
- Discovery Channel - <http://dsc.discovery.com>
- National Geographic - <http://www.ngc.tv>
- Travel Channel - <http://www.travelchannel.com>

#### Increasing travel interest due to wildlife documentaries

Having your destination featured on European television programmes, offers you very interesting commercial opportunities. For example, if Dutch television were to show a few documentaries on the migration of the wildebeest in a short period of time, Dutch wildlife tour operators would immediately see an increase in consumer interest in travelling to the African grasslands to see the wildebeests migrate.

*Source: Interviews Facts Figures Future (2008)*

### Familiarisation trips

A familiarisation trip is travel offered to travel professionals at a reduced rate so they can inspect hotels and restaurants, sample the attractions, and experience the local culture. Travel agencies offer these trips to their employees to help increase their knowledge so they can share that knowledge with their clients. Most travel agencies have a 'FAM' policy but most agencies will allow their agents to attend one FAM trip a year. The Fam Connection (<http://www.famconnection.com>) is a database listing many familiarisation trips and industry rates for worldwide travel professionals and agencies. Tourism suppliers can offer their FAM trips on this website.

### Website

The Internet offers DC operators many opportunities for sales promotion. Communication can be fast and at a low cost, irrespective of distance and unlimited in size. The Internet is used for both booking purposes and for pre-researching destinations. Building a website will certainly increase your exposure. Please refer to the CBI export manual "How to promote your website in the EU" and to the CBI market survey "The long haul tourism market in the EU" for some suggestions on how to market your website.

This survey was compiled for CBI by Facts Figures Future.

Disclaimer CBI market information tools: <http://www.cbi.eu/disclaimer>

## APPENDIX A SERVICE DESCRIPTION

Wildlife in general covers both flora and fauna, although in popular use, wildlife is mostly used to refer to animals in the wild. Wildlife covers all types of animals, including all kinds of insects and marine life.

Wildlife watching is an activity that involves the watching of wildlife. Wildlife watching is distinguished from other forms of wild-life based activities, such as hunting and fishing. Watching wildlife and animals is essentially an observational activity, although in some cases it can involve interactions with the animals being watched, such as touching or feeding them.

Wildlife travel is travel/tourism that is organised and undertaken in order to watch wildlife. In many cases, the term wildlife travel and wildlife watching travel are identical, but wildlife travel is sometimes used to refer to hunting or fishing tourism and in a few cases to the viewing of captive wildlife in zoos or confined parks where the animals no longer live in wild existence.

In this survey, the terms wildlife travel and wildlife watching travel are used interchangeably. They are defined as travel/tourism that is undertaken to view and/or encounter wildlife in a natural setting. It includes wildlife watching on large game ranches –such as those in Southern Africa- where species are able to roam widely over relatively large ranges and where their behaviour and management is essentially wild. The definition excludes travel/tourism to watch animals kept in confined conditions.

Wildlife travel overlaps with many other aspects of tourism. Sometimes wildlife watching may be undertaken by tourists who have purchased a specialist package, such as a bird watching holiday, with the specific objective of seeing certain kinds of wildlife. Equally, there are tourists who engage in wildlife watching as part of activities that focus on adventure in wild places and for whom watching animals is an added attraction but not necessarily their main motivation. Wildlife travel particularly overlaps with ecotourism, which is a form of tourism based on the principles of making an active contribution to the conservation of natural and cultural heritage. Wildlife travel has links with a wide range of different types of tourism and tourists participate in this activity for many different reasons. Tourism is highly dynamic and recent years have seen a blurring between various types of tourism. For example, a family taking a typical mass tourism package holiday to a beach resort may find and engage in a whole range of different wildlife watching activities and adventurous activities from whale watching to mountain biking. In addition, the money to pay for their trips will contribute to the local economy and to jobs and businesses that depend on conservation for their survival.

For information on the EU market for adventure travel, please refer to the CBI product survey on adventure travel. For information on the EU market on Community Based Tourism of the individual EU countries, please refer to the CBI product survey for Community Based Tourism. These surveys can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

It is important that wildlife travel should be sustainable and should protect the wildlife, habitats and communities on which it depends. To be sustainable, tourism needs to make a positive contribution to the natural and cultural environment, generate benefits for the host communities and not put at risk the future livelihood of local people, thus striving to anticipate and prevent economic, environmental, social and cultural degradation.