

## WILDLIFE TOURISM

### Definition

Wildlife tourism can be broadly defined as trips to destinations with the main purpose of visit being to observe the local fauna. This therefore implies that wildlife tourism includes other niche markets such as bird watching and the exploration of marine life (such as whale watching).



As bird watching has grown to be a significant niche market in its own right, the definition of wildlife tourism has been restricted to trips to destinations with the main purpose of visit being to observe local fauna, excluding birdlife.

### Estimate of Global Market Size

The global market size of wildlife tourism is estimated as being 12 million trips each year. Africa accounts for around one half of all these trips, with South Africa, Kenya, Tanzania and Botswana being the top destinations.

Some destinations rely heavily on wildlife tourism, but could survive without it (wildlife tourism contributes roughly \$500 million to the Kenyan economy, or 14% of GDP). On the other hand, places such as the Galapagos islands rely almost exclusively on wildlife tourists (wildlife tourism contributes £60 million to the local economy).

Other destinations are enjoying increased influxes of visitors due to strong interest in certain mammals. For example there has been considerable growth in whale watching at Kaikoura in New Zealand and Puerto Piramide in Argentinean Patagonia.

### Potential for Growth

Interest in wildlife is growing considerably, in particular as its exposure in the international media increases. As with bird watching, the National Geographic channel and other renowned television channels have generated increased interest amongst consumers.

There is still considerable potential for growth within this market, and it is expected to expand by between 8% and 10% per annum over the next decade. The age group that will most influence this growth will be the increasingly wealthy, healthy, and active 55+ age group.

### **Brief Profile of Consumers**

Wildlife tourists are some of the most diverse of any niche market. They range from the experienced specialists who like to seek “virgin” places that remain relatively undiscovered, to the inexperienced tourist travelling on a package to one of Africa’s well-known game reserves.

Across this spectrum, consumers vary considerably in age, gender, and socio-economic grouping. Package tourists vary from budget travellers through to those staying in small exclusive lodges or tented camps. However, specialists tend to be independent travellers, who are likely to stay in basic accommodation, and are generally very flexible with their travel arrangements.

Whilst the luxury-end of the package market tends to be the most demanding in terms of infrastructure and services, they also generate the greatest income. These consumers tend to be in the third-age group (50-65 years), often including the early retired.

### **Main Source Markets**

The main source markets for wildlife tourism are:

- United States
- Europe (UK, Germany and Netherlands being the top 3 markets)
- Canada
- Australia

### **Main Competing Destinations**

Africa is the market leader and accounts for around one half of all wildlife tourism trips worldwide. The traditional wildlife destinations of South Africa, Kenya, Botswana and Tanzania receive the greatest volume of visitors.

However, there are a number of emerging wildlife destinations which demonstrate the desire of consumers to seek out new destinations, in particular these are:

- Antarctica (whales, penguins and seals)
- Bolivia (New World’s largest concentration of large animals such as the Giant River Otter and Jaguar)
- Finland (particularly Hiidenportti National Park for bears, wolves and lynx)

### **Key Tour Operators**

#### ***Sita World Tours***

United States

<http://www.sitatours.com>

SITA Building, 16250 Ventura Blvd., Suite 300, Encino, CA 91436

Tel: 818 990 9530 / Toll Free 800 421 5643

Email: [sitatours@sitatours.com](mailto:sitatours@sitatours.com)

**Abercrombie & Kent**

United States

<http://www.abercrombiekent.com>

1520 Kensington Road, Suite 212, Oak Brook, Illinois 60523-2156

Tel: 630 954 2944, Toll Free: 800 554 7016

Fax: 630 954 3324

**Wildland Adventures**

United States

<http://www.wildland.com>

3516 NE 155th St, Seattle, WA 98155-7412

Tel: 206 365 0686, Toll Free: 800 345 4453

Fax: 206 363 6615.

**Wildlife Worldwide**

United Kingdom

<http://www.wildlifeworldwide.com>

Sutton Manor Farm, Bishop's Sutton, Alresford, Hampshire, SO24 0AA

Tel: (+44) 845 130 6982

**Naturetrek**

United Kingdom

<http://www.naturetrek.co.uk>

Tel: (+44) 1962 733051

**Marco Polo**

Germany

<http://www.marco-polo-reisen.com>

Postfach 50 06 09, D - 80976 München

Tel: (+49) 89 15 00 19 0

Fax: (+49) 089 15 00 19 18

**Key Points for Marketing and Distribution**

As with most niche markets, the Internet has become a significant channel for marketing and distribution. However, due to a close match with the readership of broadsheet newspapers and travel supplements, these are widely used for marketing wildlife trips.

The Internet has obviously accelerated the growth of location-based operators. However as the mainstream visitor represents the majority and highest spending of wildlife tourists the Sunday supplements are likely to be the most effective way of attracting them.

*United States: USA Today – Travel Section*

<http://www.usatoday.com>

*United States: New York Times – Travel Section*

<http://travel.nytimes.com>

*United Kingdom: The Times – Travel Section*

[http://travel.timesonline.co.uk/tol/life\\_and\\_style/travel](http://travel.timesonline.co.uk/tol/life_and_style/travel)

*Germany: Faz Frankfurter Allgemeine Zeitung*  
<http://www.faz.net>

*BBC Wildlife Magazine: Worlds best selling natural history/environmental magazine*  
<http://www.bbcwildlifemagazine.com>

**Additional Information**

*National Wildlife Federation of the United States*  
<http://www.nwf.org>

*Earthwatch Institute*  
<http://www.earthwatch.org>

*World Wildlife Fund – tourism section*  
<http://www.wwf.org.uk/researcher/issues/Tourism/index.asp>