

Exploring the market niche for ecotourism in Scotland



Summary of a survey carried out by

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This project was conducted between April 2002 and March 2004 by the Scottish Agricultural College (SAC) with funding from the Scottish Executive Environment & Rural Affairs Department (SEERAD). Its aim was to explore the market niche for a 'green' product, namely ecotourism, with a focus on Scotland. The objectives of the project were to provide information concerning:

- The features of the market segments that comprise the market niche for ecotourism
- Market attitudes towards ecotourism
- Ecotourism products that could attract the market segments

A market niche is a focused, targetable part of a market and to determine it researchers customarily employ the concept of market segmentation. A market segmentation survey that focused on the values of respondents towards the environment was conducted between the end of July and the end of October 2003. It targeted people visiting locations of natural beauty in Scotland (e.g. nature reserves) and was distributed to 20 sites around the country that are operated by public, private, local authority and non-stutory organisations. The survey produced 305 usable responses and revealed the existence of 4 market segments (Table 1).

Disapprovers are mostly male between 45-54 years of age, educated to a degree level and consider 'biodiversity preservation' a major element of ecotourism. **Scepticals** are mostly female between 35-44 years of age, educated to a degree level, and also consider 'biodiversity preservation' as the most important element of ecotourism. Hill-walking and wildlife watching are the main activities in which these two segments engage. **Approvers** are on the main between 26-35 years of age, mostly hill-walkers, equally split between male and female, with lower formal education levels (i.e. up to further education degree); to them 'biodiversity preservation' is nearly as important for ecotourism as the 'low use of exhaustible resources'. **Concerners** are also equally split between genders, but are mainly between 55-64 years of age and of postgraduate education; they are largely bird-watchers, and consider 'biodiversity preservation' as the most important ecotourism element, but only slightly more important than the 'low use of exhaustible resources'.

The analysis of visitor attitudes towards ecotourism suggested that the segments do not significantly differ among them as to how they see ecotourism. In particular, all segments consider 'biodiversity preservation' as the most important and 'small scale development'

Table 1: Ecotourist segments

Segment 1: **Disapprovers** (44.6%)

- Critical of human attitude and actions towards the environment
- High concern over the limits of the earth's resources
- Supporters of species equality

Segment 2: **Concerners** (10.5%)

- Not critical of human attitude and actions towards the environment
- Confident about human skill and the course of human development
- Disagree that all species have equal rights
- Relatively strong concern over the limits of the earth's resources

Segment 3: **Approvers** (11.5%)

- Not critical of human attitude and actions towards the environment
- Quite confident about human skill and the course of human development
- Not concerned with the limits of the earth's resources

Segment 4: **Scepticals** (33.4%)

- Critical of human attitude and actions towards the environment
- Not confident about human skill and the course of human development
- Belief in species equality
- Not concerned with the limits of the earth's resources

as the least important aspect of ecotourism (Figure 1). Most segments thought that 'low use of exhaustible resources' was the second most important element of ecotourism.

People with an interest in ecotourism are not only limited to holders of 'green' environmental values. A 'Scottish ecotourism experience' that reflects visitor attitudes towards ecotourism (Figure 1) could be developed in order to attract this market. Facilities that allow for hill-walking and wildlife watching as part of an 'ecotourism experience' while emphasising site contribution to biodiversity preservation would satisfy nearly 80% of the market. A way of achieving this could be through better interpretation of site contribution to biodiversity preservation with specialised material in order to factor for the high education levels of the biggest part of the market. Table 2 summarises attributes of types of ecotourism products that could be developed to target the market niche for ecotourism in Scotland.

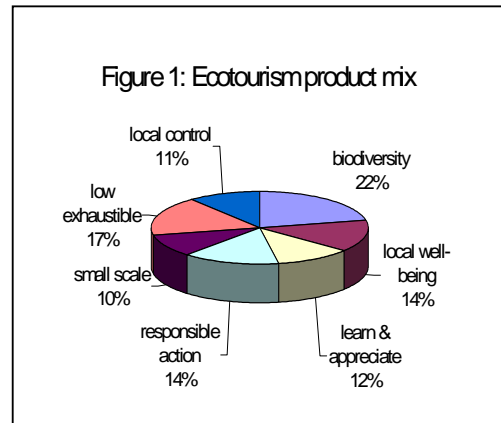


Table 2: Targeting market segments with particular ecotourism products

Market section	Product attributes		
	Types of activities	What should a site emphasise in relation to ecotourism?	Other considerations
<i>Bulk of market (78%): two 'green' segments</i>	<ul style="list-style-type: none"> Hill walking Wildlife watching 	Its contribution to: <ul style="list-style-type: none"> biodiversity preservation 	Highly educated segment of the population
<i>Dissappers (44.6%)</i>	<ul style="list-style-type: none"> Hill walking Wildlife watching 	Its contribution to: <ul style="list-style-type: none"> biodiversity preservation 	Highly educated segment of the population
<i>Scepticals (33.4%)</i>	<ul style="list-style-type: none"> Hill walking Wildlife watching 	Its contribution to: <ul style="list-style-type: none"> biodiversity preservation 	<ul style="list-style-type: none"> Highly educated segment of the population Younger segment of the population
<i>Approvers (11.5%)</i>	<ul style="list-style-type: none"> Hill walking 	Its contribution to: <ul style="list-style-type: none"> biodiversity preservation, & low use of exhaustible resources 	Young and more active segment of the population
<i>Concerners (10.5%)</i>	<ul style="list-style-type: none"> Bird watching 	Its contribution to: <ul style="list-style-type: none"> biodiversity preservation 	<ul style="list-style-type: none"> Particularly highly educated segment of the population Older segment of the population