



THE UK ECOTOURISM MARKET

This Fact Sheet provides a brief overview of travel behaviour and motivations of the Ecotourism Market in the UK. The information provided here is based on a market research study commissioned by the Destination Australia Market Alliance (DAMA). The study investigated travel behaviour and motivations of long-haul travellers in key international marketsⁱ. The total sample size for the United Kingdom was 1004 persons who were interviewed in their home country. Further secondary data analysis of the DAMA research was commissioned by Tourism Queensland to identify and profile tourists specifically interested in Ecotourism experiences.

Ecotourist Definition

For the purpose of this research, an Ecotourist is defined as someone who did at least one of the following activities on their last long haul holidayⁱⁱ

- Saw wildlife in its natural surroundings
- Stayed in the wilderness
- Visited a rainforest/ jungle
- Visited national parks

And agreed that they look for at least one of the following activities:

- Environmental/ ecological sites to visit
- See wildlife in natural surroundings
- Walk in untouched countryside and natural environments

And sometimes plan holidays around at least one of the following activities:

- Bird or animal watching
- Camping
- Nature/ ecological/ environmental/ wilderness activities
- Walking/ hiking/ bush walking/ rainforest walking/ rambling
- See wildlife in natural surrounds

Interest in Ecotourism among Tourists in the United Kingdom

Using the above definition, 26% of all tourists from the United Kingdom who participated in the original study qualify as Ecotourists.

A large percentage of UK tourists stated they were looking for activities such as “walking in untouched countryside or natural environments” (65%); “seeing wildlife in natural surroundings” (62%); or visiting environmental/ecological sites” (49%) in a long haul holiday. Almost one third (27%) of UK tourists sometimes plan their holiday around bushwalking-related activities. The following tables show further detail.

Activities participated in on last holiday	
Saw wildlife in its natural surroundings	39%
Visited National Parks	28%
Stayed in the wilderness	10%
Visited a rainforest/jungle	10%

Activities looked for in a long haul holiday	
Walk in untouched countryside and natural environments	65%
See wildlife in natural surroundings	62%
Environmental/ecological sites to visit	49%

Activities that holidays are sometimes planned around	
Walking/Hiking/Bushwalking/Rainforest Walk/Rambling	21%
Nature/ecological/environmental activities/wilderness	22%
Bird or animal watching	11%
Camping	11%

Demographic Profile

Demographic	
Age	UK Ecotourists are aged between 45 - 54 (22%); 55 – 64 (22%) and 25-34 (20%).
Gender	UK Ecotourists tend to be spread relatively evenly across both genders (53% male and 47% females).
Children in household under 18	The majority of UK Ecotourists (77%) have no children under the age of 18 in their household; 11% have only one child.
Employment status	54% of UK Ecotourists are working full time (30 or more hrs per week); 17% have retired from full time employment.
Education Level	The majority of UK Ecotourists have at least completed high school; with 22% having completed undergraduate study and a further 14% having completed postgraduate degrees.
Travel Party	In the UK, half (50%) of the respondents travelled with just one person on their previous long haul holiday.
Marital Status	UK Ecotourists tend to be married/living as married/living with partner (69%); 21% are single.

Travel Planning

Types of accommodation

During their previous long-haul holiday, many UK Ecotourists stayed in luxury (4-5 star) hotels (31%) or moderate (2-3 star) hotels (30%). Only small numbers stayed at budget hotels (15%); B&B's/Guesthouses/lodges/farmstays (14%); all-inclusive resorts (10%); backpackers (8%); camper vans/caravans (3%); catered villas/apartments (2%) or tents (2%).

Booking timeframes

Many UK Ecotourists started planning their long-haul holiday up to three months (31%) or between six and nine months (30%) prior to departure. Another 28% started planning one year before.

Organising Previous Holiday

In the UK, arrangements made prior to leaving ranged from organising just flight/transport (26%) through to arranging everything prior to departure including meals and tour activities (17%).

Inspiration and Travel Ideas for Long-Haul Holidays

For the UK Ecotourist, the top five sources of travel inspiration and ideas are:

1. TV travel programs (43%)
2. Friends who have been there (37%)
3. TV documentaries (27%)
4. Magazine Articles/travel sections (22%)
5. Family who have been there (21%)

Sources of information to research travel destinations

In the UK the top three sources of information used by Ecotourists are Internet travel sites (44%); Travel books or guides (41%), and travel agents (34%).

Sources of information to Research Destinations	Percentage
Internet travel sites	44%
Travel books or guides	41%
Travel Agent	34%
Friend or relative who has visited the country	33%
Look out for things on the TV	33%
Friend or relative who is living in the country	27%
Travel agent/tour company brochures	26%
Magazine articles/travel sections	26%
Newspaper articles/travel sections	22%
Specialist travel magazines	20%

Media habits

Among the TV programmes viewed by UK Ecotourists, "Holiday and travel" rate third (65%) after "Documentaries" (74%) and "Movies" (66%). Programs on wildlife are viewed by fifty-one percent (51%) of respondents.

The favoured types of magazine read by UK Ecotourists are Hobby/ leisure magazines (20%). Nine percent (9%) of UK Ecotourists read National Geographic.

Travel behaviour

Destinations considered and factors influencing choice of destination

For UK Ecotourists, the top holiday destinations seriously considered are Australia (39%) followed by Canada (25%) and New Zealand (22%). For UK Ecotourists, the choice of destination largely depends on "recommendations from family or friends who've been there" (78%); "whether they feel the destinations would be worth the money" (74%) and "the requirements of those they are travelling with" (69%).

Key Factors Influencing Choice of Destination:



Number and length of last long haul holiday

The majority of UK Ecotourists have taken one (38%) or two to three (34%) long haul holidays in the last five years. Of those who have taken at least one long-haul holiday in the past five years, the majority of trips were 15 days to three weeks in duration (32%), followed by eight days to two weeks (26%).

Motivations of going on long-haul holidays

For UK Ecotourists the top three motivations of going on a long-haul holiday are "to see new things" (98%), "to see more of the world" (98%) and "scenery & landscapes to explore" (97%).

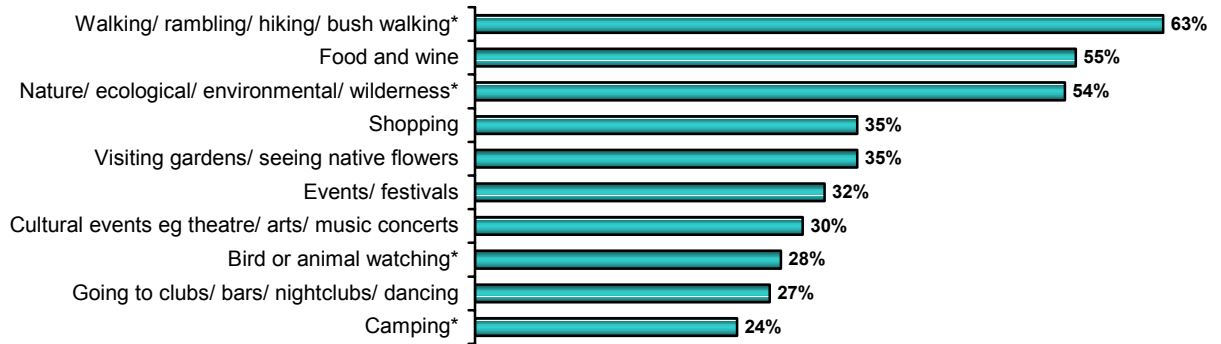
Motivations of going on long-haul holidays	Percentage
To see new things	98%
To see some more of the world	98%
Scenery & landscapes to explore	97%
To have fun	95%
To experience a different culture	92%
To do something completely different	87%
To have an adventure	87%
Native wildlife*	86%
Good food & drink	85%
To get away from it all	85%

* Ecotourism defining variable.

Activities which holidays are often planned around

For UK Ecotourists the top three activities that holidays are often planned around are "Walking/ rambling/hiking/bush walking" (63%); "Food and wine" (55%), and "Nature/ ecological/ environmental/ wilderness" (54%).

Top 10 Activities which holidays are often planned around



* Ecotourism defining variable.

Travel to Australia

Attitudes of UK Ecotourists towards Australia

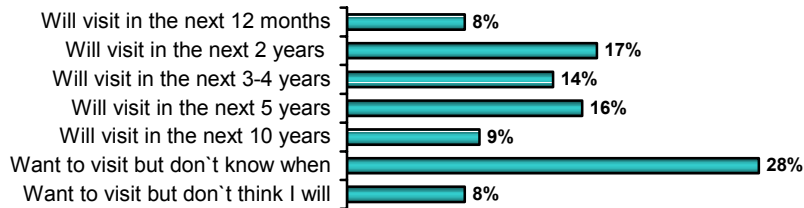
For UK Ecotourists the top three attitudes towards Australia as a travel destination are: "Australia has a huge variety of unique wildlife and habitats"(97%); "Australia has fabulous beaches "(97%), and "I could have an experience of a lifetime on a holiday in Australia"(87%).

Top 10 Attitudes of UK Ecotourists towards Australia



Visiting Australia

The majority of UK Ecotourists (71%) have never travelled to Australia (71%). A large percentage (28%) want to visit Australia but don't know when, with a further 17% expecting to visit Australia within the next two years. The majority of these prospective visitors intend on staying for more than 21 days (88%).



Amongst those likely to travel to Australia in the next two years, the majority would “visit a couple of regions to get a feel for Australia's diversity” (28%) or “several different regions to see as much as they can” (57%).

A full report is available on request.

Further Information

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ⁱ For the United Kingdom, long-haul holiday destinations as specified in the DAMA questionnaire, are all destinations other than Western and Eastern Europe, but excluding USA – Florida, Egypt and Morocco

ⁱⁱ Tourism Queensland acknowledges that a universal definition of an Ecotourist does not exist. A limitation of the definition used for the purpose of this analysis is that it is based on the selection of the most appropriate variables from the existing DAMA research.