TRANSNATIONAL MARKETING REPORT

Sustainable Heritage Areas: Partnerships for Ecotourism
Deliverable DT4.4.1

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Table of Contents

Aim

The aim of task T2.4 was to evaluate potential consumer markets (national and international) to which ecotourism products can be promoted, to enable local and regional businesses to capitalise, for example through developing marketing clusters or the use of effective and inspirational promotional media. Taking findings from a wide range of media, and drawing upon the lessons learnt in correlative studies (for example 'slow adventure'), the report identifies and discusses:

- Potential national and international consumers.
- The best means to reach such consumers.
- Conclusions on branding and marketing-cluster activity.

The report will feed into the e-service and is complemented by the 'social media report', which explores the effective use of social media for engaging with consumer groups and target markets.

Methodology

In order to yield the required data and findings the work package was split into two discrete parts:

- Secondary, desktop research.
- Primary fieldwork, undertaken by two partners.

Secondary Research

The secondary, desktop research was undertaken utilising the following methodology, divided into task leader and partner tasks:

Project partners:

- Undertook regional and national desktop research to determine and understand elements such as:
  - Market statistics and trends.
  - What are the new consumer trends?
  - Which consumers to target and why.
  - The development of customer typologies.
  - What new ecotourism products and services should be marketed to these consumer groups.
  - How to target these consumers.

The task leader undertook similar research at a 'wider' international scale, to take cognisance of influential reports from the USA for example. It also sought to determine and understand elements such as how and why people buy 'experiences'.

In all cases, relevant websites, media and academic articles, papers and reports were identified and analysed for findings and discussions.

Primary Data Collection

Two SHAPE partners undertook primary research to a) complement the secondary research findings in this report and b) provide insightful, geographically focussed findings on consumer behaviour.

Karelia

In essence, the primary data were derived from SHAPE land-use questionnaire results, collected in the form of an online map-based questionnaire: a 'maptionnaire'.

This is a map-based survey tool that facilitates simple and effective public participation and can be used to collect, analyse and visualize map-based data, as well as portraying stakeholders' preferences and opinions. It consists of two parts: (1) mapping value areas, and (2) a follow-up questionnaire integrated within the maptionnaire. The follow-up questions consisted of multiple choice and open-ended questions that delved deeper into the values mapped by respondents. The survey included questions regarding respondents' background, their personal values in deciding travel, satisfaction with their travel and the destination, and opinions on developmental needs.

The questionnaire was open from mid-September to mid-December and was available for respondents in English and Finnish. The target areas were Ruunaa, Patvinsuo, and Koli regions of the North Karelia Biosphere Reserve. The target respondents for this research were: visitors, tourism products and service providers, land owners, and local residents.

After closing the online survey, the raw data were downloaded from the 'Maptionnaire' online platform in the form of a 'shape file' and Excel spreadsheets. The value-based mapped data (in the shape file) were then transferred to Citrix XenApp (using ArcGIS map as a base) and analysed. The raw data were analysed using: (1) Excel, and (2) Word cloud for open choice questions.

The detailed method is described in full in *Transnational Marketing Report: A Case of North Karelia Biosphere Reserve*, available separately.

Wester Ross Biosphere

A visitor survey was developed and conducted by both Wester Ross Biosphere and the Centre for Recreation and Tourism Research, and It was one of the planned phases in the process of developing the first destination management plan of Wester Ross.

Its principal objectives were:

- To understand visitors to Wester Ross through the analysis of their behaviour and travel decisions;
- To identify major issues related to tourism to the region and address them;
- To listen to visitors and understand their needs;

The total number of collected responses was 608. The survey was initially conducted face-to-face using QuickTap, which permits the use of an 'offline' Survey Monkey. This took place from July 20th to August 10th, at strategic tourist attractions, sites and events. A second phase involved publishing the survey online, e.g. on Facebook pages related to tourism in Wester Ross, such as the North Coast 500 group. This second stage allowed us to collect a much greater set of responses. Ninety-nine 'locals' responses were also collected, not discussed here.

Findings

This section is structured along the lines of:

- Briefly setting the tourism industry **context** and '**the eco-tourist'**.
- Discussing 'generic' **consumer trends** which may influence people's motivations, attitudes and behaviour, as both general consumers and tourists.
- A discussion of broader **global travel trends**.
- Outlining some **key trends in tourism products** offered by businesses to cater for changing consumer demands.
- The findings from a market report that sought to identify **the future shape of travel**.
- A brief description of typical **consumer typologies** for these types of sustainable tourism experiences.
- A brief introduction to **key market demographics**, which will feed into…
- Discussions on the **best means to promote products** to consumers.

The key trends and themes are summarised in the table overleaf.

Setting the Context

Travel and Tourism is one of the world's fastest-growing sectors. According to the World Travel and Tourism Council, in 2017, it contributed nearly $7.9 trillion to the global economy, or 10.2% of global gross domestic product. Adventure tourism in particular continues to grow, and by ATTA's projections the international adventure travel market can be valued conservatively at $683 billion. A very large rise in value in recent years has been attributed to increases in:

- Expenditure on vacation.
- The percentage of people choosing an adventure holiday compared to other forms of holiday.
- The number of people taking holidays.
- Tourists from emerging markets.

Sustainable Tourism

The 'Top Trends in Sustainable Tourism Report' report (GlobalData, 2017) reveals that increased awareness of social, economic and environmental sustainability has spread rapidly through the digital world and social media, and has given rise to a new type of tourist, characterized by environmental and cultural sensitivity. Climate change and the rise of responsible travellers is creating a compelling business case for sustainable tourism. According to GlobalData's Q4-2016 consumer survey, 35% globally are likely to book eco-tourism holidays. The countries that present the biggest interest in eco-tourism are Malaysia (76%), followed by China (67%) and Turkey (65%).

In a survey by TripAdvisor in 2012-2013 (35,042 respondents), 71% of respondents said they plan to make more eco-friendly choices in next 12 months compared to 65% that did so in 2011. In addition, 79% of travellers globally responded that it is important that accommodation providers keep eco-friendly practices. The UNEP background report on tourism in the green economy also noted that recent market studies have revealed that tourism consumers are more interested in tourism products and services that protect the environment and respect local cultures, as tourists' choices are increasingly being influenced by sustainability considerations. The Travel Industry Association of

America (TIAA) found out that 58.5 million American travellers responded that they would “pay more” to use travel companies that strive to protect the environment.

KEY TRAVEL AND TOURISM TRENDS AND THEMES

Global Travel Trends
Sustainable travel, with travellers seeking environmentally conscious options
An increase in the number of solo travellers
Visitors immersing themselves in the destinations they visit
Physical and mental wellness are key motivations for many travellers
More consumers wanting a unique once-in-a-lifetime experience
Making a country, as a destination, far more compelling than only one or two key places
Tourism Product Trends
Ecological tours
Foodie holidays
Increase in trail tourism
Increase in products for solo travellers
More products for female travellers
Key Consumer Trends
Travelling with 'empathy' – with respect, responsibility, compassion and understanding for the environment and for communities
Being well-educated and having above-average income
Having a desire to acquire and share social capital, through social media
Being aspiring nomads who seek nature experiences as an antidote to their urban lives
An openness to pursue more ethical travel
A desire to 'get lost' and find themselves
A move towards a 'sharing' ethic: attracted by AirBnB, for example, rather than staying in a hotel
Core Ecotourism Themes
A feeling of escapism is a highly important motive and prompts a strong sense of de-stressing
Nature is a significant element and a strong contrast to many people's everyday lives. The opportunity to spend further time in nature is desirable
Both time alone in nature and time shared with friends in nature are important motives
A sense of having fun and freedom in the outdoors is important
Emotions such as joy and peacefulness are expressed in terms of the natural beauty of the landscape - these emotions are intensified when experienced through activities outdoors
Ecotourists are internally motivated and open to experiences that are unique, educational and nature focused
Ecotourists find wonder in the vastness of nature, one's proximity to nature and the folklore that enriches the natural environment. They talk about little details in nature and enjoy eating or trying foraged or wild food
The importance of trying somewhere, or something, new – with great potential for social media material
Longer stays, 'dwelling' in places, over frequent short trips should be encouraged, commensurate with the notion of slowing down

According to Holden (2000), eco-tourists fall into three main categories: nature tourists (also termed "users"), "soft" eco-tourists ("eco-aware") and dedicated, "special eco-tourists". Nature tourists are quite common as their main goal is to find destinations that provide activities in nature, close to nature or revolving around use of nature, for example marine, wildlife and bird watching enthusiasts. Their main aim is to see nature, take photos and also include other secondary activities such as scuba diving.

"Soft" eco-tourists are usually inspired by the experience and quality offered by the eco-holidays they take. They are not usually necessarily knowledgeable about sustainability principles but have a drive to act responsibly and hence rely on the tour operators and service providers' to deliver the responsible experience for them.

The last group however, the dedicated eco-tourists, have a strong will to act sustainably, hence their primary motivation is to find holidays in destinations that strive for eco-efficiency, and service providers that try to maximize their efficiency as well as providing the holiday experience. Most tourists falling under this segment usually consider sustainability over luxury and possess high expectations from the products and service providers.

This last segment is deemed to be rather small and consists about 10-20 percent of all travellers, with the segment largest in Netherlands and smallest in Spain. In other research (CBI, 2014), Germany, the Netherlands and the UK are also considered strong nature and ecotourism consumers. Atlantic Europeans (Great Britain, Ireland, Iceland, Belgium, Netherlands, Portugal, Spain, France, Scandinavia and Germany) are also considered very keen on sustainability considerations when travelling (Tyrväinen *et al.,* 2014).

The New Consumer Trends

Mintel (2018) has described the six key consumer trends that are impacting industries and markets around the world. The global consumer landscape is driven by themes of privacy, individuality, wellness, convenience and connectivity.

- Total wellbeing – consumers are looking externally to their surroundings and internally towards their physical and mental wellbeing, expecting holistic approaches to wellness.
- Challenge accepted – a growing momentum to take on new challenges is driving consumers to reach new heights and uncover new passions.
- Rethink plastic – consumers are reviewing their own behaviours to prevent plastic pollution.
- On display – consumers and brands are becoming more aware of the importance of being visible online.
- Social isolation – there is a demand for products and services that help consumers disconnect.
- Redefining adulthood – consumers are adapting to lives that don't fit the mould and brands have to adapt to flexible lifestyles.

Top trends and consumer categories have been identified in the Euromonitor report (2018) and the following are the most relevant when considering the development of ecotourism products:

- Clean Lifers
- The Borrowers
- Call Out Culture
- View in My Roomers

Clean Lifers

Consumers are adopting clean-living, more minimalist lifestyles, where moderation and integrity are key. Clustering around educated 20–29-year-olds, a new generation of “straight edge” consumers has grown up knowing deep recession, terrorism and troubled politics, and has a wider world view than previous generations. They have been shielded by affluent Generation X / Baby Boomer parents, and take more guidance from them; possibly resulting in lower self-confidence. They are keen to secure a more ordered existence for themselves.

Clean Lifers prefer to stay in and relax rather than hit a nightclub. Clean Lifers would rather spend their money on experiences, such as weekends away, festivals and restaurants, where they are able to chat with friends, or healthier social alternatives, such as hosting fitness class parties from yoga to high intensity workouts.

According to the Family Travel Association (FTA), multi-generational travel is the fastest growing segment for many travel companies. Operators and agents around the world are focusing on the trend. Scott Dunn, a luxury travel company based in the UK, USA and Singapore, states that this is the fastest growing area for them. HomeAway competes closely with Airbnb; highlighting that their short-term rental properties tend to be larger and therefore the types of properties that are appealing for multi-generational holidays, they use the tagline ‘The whole house. The whole family. A whole vacation’.

The Borrowers

A new generation of community-minded sharers, renters and subscribers is reshaping the economy, making conspicuous consumption a thing of the past. Rejecting material goods in favour of experiences and a freer lifestyle, which has characterised the buying habits of millennials for the last few years, is a trend that continues to evolve and spread. It is now beginning to impact older generations: previously materialistic Baby Boomers are looking to downsize and simplify their lives. Sharing economy stalwarts such as Uber, Rent the Runway and Airbnb have entered the mainstream. Meanwhile, new, innovative start-ups continue to emerge to satisfy the Borrowers. Affordability, convenience and sustainability are key factors in the growth of the sharing economy.

Call Out Culture

Whether it is airing a grievance on Twitter, sharing a viral message or signing an e-petition, consumers are having their say. ‘Hashtag activism’, while not new (the Twitter hashtag turned 10 in 2017), is rapidly gaining momentum as internet usage explodes and more people have access to social media. The global success of the #MeToo movement in the wake of recent sexual harassment scandals is testament to the growing empowerment of consumers, who use their collective voice to fight injustice and call brands to account. In response, marketers are being forced into greater interaction with customers in the public space – however big or small their grievance.

View in My Roomers

View in My Roomers are connecting perception and reality, merging digital images with physical space. Consumers will be able to visualise products before they try or buy, both in-store and online. According to a study amongst 15–69-year-olds, conducted by Ericsson ConsumerLab across France, Germany, Italy, Japan, South Korea, Spain, the UK and the US, 25% of early adopters believe consumers will be exploring travel destinations through ‘augmented reality’. View in My Roomers will increasingly look for immersive “try before you buy” online shopping experiences, bringing the benefits of in-store shopping into the home.

Co-Living

The Co-Living trend has blossomed amongst Millennials and the over-65s in the residential space. It is a form of housing where residents share living space and a set of interests and values. The trend stems from hyper-urban hubs that have embraced the sharing economy as a lifestyle choice. In its most basic form, co-living sees people share spaces and mutual facilities to save money and inspire collaborative ideas or provide comfortable, more acceptable living conditions.

Global Travel Trends

Sustainable Travel

The negative effects of large tourism numbers were acutely felt in destinations around the world in 2017, and it is expected that over-tourism will continue to be a serious issue felt by ecotourism and mainstream tourism destinations alike (ATTA, 2018). Therefore, travellers are seeking out less popular destinations, opting for environmentally conscious accommodation, or doing activities that benefit the local society. With a focus on meaningful experiences, education is a key driver for travel. VisitScotland uses the term 'travagogy' to refer to the visitor 'journey' rather than the overall destination. Travel can help to fill in the gaps in one's formal education and more visitors are looking to learn about the places they are visiting and learning about local culture and heritage.

Sustainable travel or ecotourism has been a trend for many years in the wider travel industry. According to Go Overseas (2018), this is predicted to continue to permeate the world of meaningful travel in 2019. Sustainable travel means being aware of the impact travel, and the traveller, has on the place where you are travelling. It also means being aware of the environment while traveling, and of how animals are treated. ABTA research shows that almost 70% of people now believe that travel companies should ensure their holidays help the local people and economy (ABTA Travel Trends Report 2018). In 2018 it was expected that there will be more initiatives such as social enterprise projects which give back to local communities, carbon-neutral group tours and the banning of plastics from beaches (ABTA, 2018).

Sustainable travel goes hand in hand with 'slow travel', when visitors stay for extended periods of time in a destination. This market is set to grow so both adventure operators and adventure destinations should learn how to attract these consumers and work with this market (ATTA, 2018).

Solo Travel

More companies report seeing an increase in the number of solo travellers and are creating itineraries specifically for this market. Abercrombie & Kent reported a 15% increase in solo travellers in 2016 compared with 2015. According to MMGY Global, about one in four American travellers say they would travel solo in 2018 (ATTA, 2018). After seeing a 40% increase in solo passengers on group trips over the past five years, Intrepid Travel launched their first solo-only tour range.

The increase in this type of travel is largely caused by the wider availability of resources for this market such as booking platforms and specialised itineraries, as well as media coverage about solo travel (https://cdn.adventuretravel.biz/research/2018-Travel-Trends.pdf).

Being a Local

Increasingly visitors are engaging with products they would or could not access at home. By supporting local businesses, and directly contributing to the economy of the region, visitors can experience a sense of place and live like a local.

American Express recently polled a group of its travel "counsellors" (agents) to ask them what trends they're seeing for summer travel. Of them, 34% responded that their customers are "specifically looking to immerse themselves in the destinations they visit and to travel like a local." For example, the United States Tour Operator Association (USTOA) is seeing increasing numbers of travellers looking for more immersive experiences, but the rise in demand is spread across both emerging and traditionally popular destinations.

Visit Copenhagen has launched a new strategy called LocalHood, which targets the traveller who seeks to be a 'temporary local', that is, one who searches for "a personal connection to an instantly shared experience based on interest, relations and authenticity" (ATTA, 2018). Technology platforms exist to facilitate these personal connections, such as Airbnb experiences. This may even offer a solution to over-tourism.

Wellness

Adventure travellers are increasingly seeking experiences that allow them to unplug, focus inward, and tap into the mental health benefits of adventure travel (ATTA, 2018). ATTA's 2017 research showed that physical and mental health are key motivations for travellers when they seek out adventure travel. The trend is for adventure itineraries to include an element of wellness.

There is the opportunity to embrace wellness within the visitor economy. Landscape and open spaces, food and drink, local culture and the natural and built heritage are some of the elements that are aligned to current tourism offerings.

The VisitScotland Mega Drivers suggest three elements for how wellness is influencing the travelling consumer:

- The Art of Now: Looks to the development of the individual. This may be through self-development or an appreciation of the culture and heritage of the destination the individual had found themselves in. This embraces enrichment and personal growth.
- Sensory Tourism: Immerses the visitor in the environment they find themselves in. Both urban and rural destinations can contribute to the visitor's desire to experience tangible sensations.
- New Society Norms: More people are seeking something meaningful in their lives which travel can, in part, contribute to.

Experiences

Arguably the most significant, systemic trend in worldwide tourism today is the demand for 'experiential travel', involving more immersive, local, authentic, adventurous and/or active travel (Skift, 2014). This was identified as a key trend for 2018 but is set to continue in 2019 with tour operators receiving more and more requests from those wanting a unique once-in-a-lifetime experience, as more millennials want to explore the world and try something they can't do at home (http://emittistanbul.com/About-Exhibition/News/5-global-travel-trends-for-2019). Hobbies, skills development and unique opportunities are all growth areas and writing workshops, artist retreats, outdoor survival schools and cookery course all add to the attractiveness of a destination.

With an increase in visitors looking for the distinctive and the authentic, this will often translate to enjoying imperfect moments. In 2019 we anticipate this will translate into travel and tourism, with consumers embracing genuine and down-to-earth sharing of experience. There is a growing appetite among travellers for these genuine experiences that cannot be properly satisfied by superficial visits that do not get 'below the surface of a place' or from mere second-hand knowledge. Younger generations in particular perceive travel as even more integral to their lives than previous generations, characterising it as a whole new learning experience to complement their formal education and work. The spending habits of the millennial generation differ to those generations before them. Millennials will often splurge on experiences that they consider to be unique or unexpected, and then tell their friends about it via social media.

Destinations are becoming increasingly sophisticated in analysing what their visitors are looking for and exploiting their experiential credentials to the full, focusing on this desire for authenticity and building a strong emotional connection from highly tailored marketing to supporting visitors all the way along their journey.

Flight shame

Flygskam, the Swedish word literally translated as "flight shame", is the name of an anti-flying movement that originated in Sweden in 2018, encouraging people to take fewer flights, to lower carbon emissions. Popularly, although incorrectly, accredited to the teenage activist Greta Thunberg, the 'movement' is gaining some traction in parts of Europe where train travel is seen as a viable alternative to short-haul flights. This is suggested to correlate with the wider wellness movement, with an appreciation of the impact that travel can have on both the environment and one's well-being, physical and psychological. Organisations demonstrating that they are sympathetic to these ethics through their own practices, by supporting their visitor objectives will benefit.

Limitless Discoveries

The concept behind this trend is to make the sum part of a country, as a destination, far more compelling than only one or two cities or famous landmarks. It is instilling a sense of excitement and adventure that there is so much to explore and uncover. The intention is to stimulate visitors to know more, do more, travel further and stay longer, presenting new locations to visitors and making remote places feel well connected and easily accessible. Major cities are increasingly positioning themselves as gateways to other parts of a country and this is savvy marketing as well as responsible, sustainable practice.

It is important to support travellers to make a smooth transition from city to countryside and coast with smart itineraries and joined up experiences, instant booking facilities across multiple kinds of transport and reliable, eco-transport connections.

This needs the appropriate transport infrastructure to enable people to easily move between the urban and rural areas, combined with the digital infrastructure which will allow stimulation and inspiration for visitors. Increasingly millennials and younger generations, the future visitors, are moving and thinking in a much faster way. Northern European countries can emulate the successful examples of New Zealand and Canada, to further expand on scenic routes targeting North American and continental European visitors around cultural, historical, seasonal and wilderness themes.

Tourism Product Trends

New product trends are often legion and it can be difficult to get an accurate picture of whether they apply to a specific country or region. For example, as Iceland has many similarities to parts of the other Nordic countries in terms of its appeal to the tourism market it is interesting to see what trends in Norway can be applied to Iceland, as well as other Northern European countries. According to a Norwegian Masters thesis: "The highest-ranking tourism experience trend for Norway was to experience local culture and locally produced products. For Sweden, the top trend was nature experiences and high quality services and facilities. And finally, for Finland, the top trend was physical activity and fitness in nature.“ New product trends identified in industry reports include:

Foodie Holidays

The is a set to be a popular trend for 2019 as food and drink play an ever-increasing role in deciding where to holiday. This has been largely helped by social media – particularly Instagram. Travellers want to learn first hand from a local chef how to cook local dishes from local ingredients. For example, Sri Lanka was set to be a popular destination for food tourism in 2019 – Intrepid Travel has reported a 40% increase in bookings on their Sri Lankan food adventures over the past year (http://emittistanbul.com/About-Exhibition/News/5-global-travel-trends-for-2019).

Ecological Tours

Ecological tours are the most popular tours offered by many tour and activity operators who responded to the 2018 Trekksoft Tourism Survey (Trekksoft, 2019). These are usually rare experiences that educate and share inside information on the area, and how to protect it for the future. Tours that use proceeds to fund ecological projects such as forest or animal habitat restoration are chosen above alternatives without a cause (Trekksoft, 2019).

Increase in Trail Tourism

Destinations are actively marketing trails to keep tourists in the destination longer. Trail tourism has many benefits to destinations as it increases the length of stay of low-impact tourists, promotes repeat visitors, and drives money to local businesses (ATTA, 2018). For tourists, a trail holiday provides a sense of accomplishment and aids mental well-being, as well as delivering local, authentic experiences (ATTA 2018).

Increase in Products for Female Adventure Travellers

According to the Huffington Post, there has been a 230% increase in the number of women-only travel companies in the past six years (ATTA ,2018). Some adventure operators cater exclusively to females, such as AdventureWomen, whereas others simply offer specific itineraries that are bookable only by women, such as Austin Adventures. These women simply seek like-minded female companions with whom to share their adventurous journeys (ATTA, 2018).

Winter Products

Destinations with winter offerings are seeing large increases in arrivals in the colder months – and not just for skiing (ATTA, 2018). According to Iceland Statistics, one third of Iceland’s tourists visited during the winter months (from January to April). Winter is the peak season for many of Greenland’s regional destinations, and the Yukon, in Canada, found that the largest contingent of tourists all year in 2016 were there to see the aurora borealis (ATTA, 2018). Destinations are increasingly investing in infrastructure to accommodate winter tourists.

The Future Traveller, 2030

A 2015 report by the Future Foundation for the Amadeus IT Group sought to ‘future-cast’ and identify non-country-specific, generic traveller groups or ‘tribes’ that will shape the future of travel. These tribes were contextualised against changes in the consumer and technological landscapes. The relevant consumer ‘drivers’ include:

- Changes in working patterns – greater choice as to when to travel?

- Bundling of travel options to simplify decisions.
- More online networking – not using social media leads to alienation?
- Greater importance of peer power – review sites become more reliable and trusted.
- More imaginative use of stories to sell products.
- Greater ethical concerns.

The six tribes identified are differentiated on the basis of factors such as demographics, attitudes, behaviours, needs and consumption. Of the six, two are believed to be less relevant: 'simplicity searchers', who want everything doing for them, and 'obligation meeters', most notably business travellers. The four more-relevant tribes are:

Cultural purists: this group of people use travel to break from their everyday lives and immerse themselves in new cultures or experiences. Open-minded and well-educated, they may resist too much planning, and many will seek experiences off the 'beaten track', with elements of the unknown or even danger.

Social capital seekers: perhaps not as obvious a consumer group, nonetheless the desire to see 'spreadable content' in experiences will appeal, as adventurous experiences carry great potential social capital. For some, these experiences may be no more than rites-of-passage, going to new places in order to be, and be seen as, well-travelled.

Reward hunters: while this group may be seeking 'premium', with appropriate connotations of luxury or indulgence, rewards can also refer to 'must have' experiences which can build ourselves mentally and physically, and to 'life-affirming experiences which transcend the everyday routine'.

Ethical travellers: although few will change their travel behaviour so radically as to not fly, many in this tribe will seek an ethical dimension to their travel experience, through elements of volunteering or community development (by shunning' big business' for example and ensuring their tourist spend goes directly to local SMEs), or by incorporating environmentally–aware activities into their vacation.

Consumer Typologies

For many travel businesses, personalisation has become a key consideration for overall content strategy and key to successful personalisation is having a meaningful understanding of the unique needs, preferences and priorities of each customer. Quill, a UK-based 'content production platform, has identified a number of traveller typologies, three of which are especially pertinent:

Escapists

Escapists are usually millennials who work hard to afford trips abroad. For these adventurous travellers, holidays are an opportunity to immerse themselves in a new activity or environment – an antidote to their stressful daily lives. According to Expedia, 42% of millennials are influenced by friends' photos on social media when considering their next holiday destination. User-generated content is therefore on of the best ways to get this segment's attention. Millennials are also voracious consumers of video, making this an ideal format for promoting the features of active holidays. Millennials are the age group most likely to travel for stress reduction and 'excitement'. As a result, Escapists seek authentic experiences on their own terms (https://www.quillcontent.com/insights/blog/using-personalised-travel-content-to-target-5-core-customers).

Culture Vultures

Culture Vultures seek new cultural experiences where they can learn and explore. They take pleasure in pre-planning a trip and guide their decision-making with handy 'how-tos' and overviews of the cultural aspects of their trip. Their most common priority is visiting historical and architectural sites, culinary experiences, getting to know local people and discovering 'hidden gems'. Authenticity is also key (https://www.quillcontent.com/insights/blog/using-personalised-travel-content-to-target-5-core-customers).

Leisure Seekers

Those travelling for this purpose look forward to their holiday as a chance to refresh and recuperate. They travel solo or with friends, enjoy an above-average income and accordingly have a taste for the finer things. They will look for authoritative content incorporating relevant long-tail search terms and inspiring photography. This segment is interested in wellness and luxury amenities. Women travelling together remain a crucial market here (https://www.quillcontent.com/insights/blog/using-personalised-travel-content-to-target-5-core-customers).

As an example of country-specific typologies, VisitScotland has identified 10 customer segments in the UK tourism market. Five of these segments it considers to be 'the best return on investment'. In terms of these 'warmer' consumers, the following three groups are believed to be more likely to be interested in eco-tourism experiences:

- *Curious travellers*: This is one of the most affluent segments, comprising free spirits who seek to broaden their minds, try new experiences and explore local culture. These consumers lie across a wide age range, while wildlife, walking and taking in natural sites are drivers for their activities.
- *Natural advocates*: With above average income and most likely to be 35-54, this consumer group likes exploring beautiful landscapes and getting away from it all. As they are characterised by enjoying slower activities and natural and beautiful landscapes, they could form an important market.
- *Adventure seekers*: Again, with above average income, predominantly under 35, and a propensity to explore new places, take active holidays and enjoy cultural activities, this consumer group could also be a key market. As a group they like active sports and landscapes and are more likely to consider camping as an accommodation option. They comprise 9% of the potential market.

Targeting these more attractive customer groups should be characterised by promotion of 'authentic', rewarding and high-quality experiences in beautiful landscapes and with a strong cultural element.

Passion Communities

2019 research for the European Travel Commission (ETC) took a different approach. Rather than consumers being segmented by socio-demographics for example, it suggested that passion communities are groups of people that are bonded by their 'passion' – a special interest that may be a hobby, and activity, or indeed a motivation.

The survey work undertaken for the ETC identified 'nature' as the "largest interest driving people's travel decisions", followed by gastronomy and city life. Using this to underpin the development of passion communities, the work identified four key groups: Gastronomy lovers, city life enthusiasts, immersive explorers and explorers of cultural identity and roots.

The 'immersive explorers' are described as those who enjoy activities at a slower pace, more often male and younger (18-34) than the average tourist. They prefer to travel on their own or with a partner, and typically come from markets such as the USA, Canada, Brazil and Australia. Saving on accommodation, by staying at guesthouses or rented properties, for example, enables them to spend more on experiences.

Interestingly, while the preferred time travel for immersive explorers is across the summer months, the peak months are May and June, with April as popular as July, and with a resurgence of interest in October.

The findings, based on 3000 surveys of consumers from 12 non-European countries, are suggested to help "European destinations to effectively connect with these groups of travellers and promote Europe based on their passions or interests".

Key Market Demographics

Millennial market

The Millennial generation is one of the largest generations in history – even surpassing Baby Boomers. Suggested in 2016 to encompasses people between 16 to 36 years old, it is not a uniform and homogenous group with a common set of values and behaviours, and within the generation itself lies an enormous range in their life stage, career and disposable income. But one thing that binds them all is a strong desire to enrich their lives through travel (VisitScotland, 2017).

Millennials prefer unique experiences, applying to anything from off-the-beaten-track destinations, to adventure activities, quirky accommodation and local food. The sharing economy is a very popular concept for its features such as connection with local communities, creation of authentic local experiences, and value for money. This is one of the reasons why AirBnB accommodation and experiences are becoming increasingly popular, providing the opportunity to 'live like a local'.

Millennials show less interest in the usual destinations. Their general sense of adventurousness manifests itself in their interest in other exotic cultures, ethnic cuisines and novel activities often in remote places. Therefore, millennials are good at driving tourism to less visited areas, that other generations start to follow.

Family Travel

Growth in family bookings has outpaced non-family sales since summer 2012, with the sector now accounting for almost 40% of summer bookings compared with 20% of winter sales (Trekksoft, 2019). Therefore, tour and activity companies are removing family tickets or are offering a large variety of options.

Business and Leisure

It is becoming more common for business travellers to utilise the opportunity to take time for themselves, explore and travel. According to a report by Expedia Media Solutions, around 60% of business trips in the last year included a leisure portion (Trekksoft, 2019).

Solo Travellers

As mentioned above, solo travel is a global travel trend, and has extended across all generations and to many destinations. According to Travel Agent Central, 25% of millennials in the *Future of U.S Millennial Travel* report said that they plan to travel solo in the next 12 to 24 months (Trekksoft, 2019).

Lonely Planet reported that women over 50 years are 'leading the boom in popularity for solo travel in the UK' and around 67% of solo travellers are female (Trekksoft, 2019).

Baby Boomers

According to Vend (2015), a New Zealand company that deals in global point of sale, retail will continue to be driven by the needs of two prominent generations: baby boomers and (the aforementioned) millennials. Quoting PwC, 'the baby boomer generation will age with increased financial resources and with a greater emphasis on youth and vitality than previous generations.' Retailers will need to consider how to cater for their needs and make retail experiences easier and more pleasurable.

Baby boomers are characterised as being more affluent consumers with a passion for trying something new and with more time to indulge in slower experiences. But they are also demanding consumers and often switched on: 64% of internet users aged 50-64 in the US are on Facebook (Pew Research Centre, 2015).

Key Consumer Markets

Finland

In Finland, domestic tourism still dominates with as high as 85 percent. Domestic tourists account for between 14-15.5 million overnight stays annually, while foreign tourists consist of roughly 5.5-8 million annual overnights. With regard to international visitors, the EU, Russia, Asia and United States of America are the largest segment. Country wise, Russia is the largest market (24 percent), followed by China (17 percent), Sweden (8 percent), and Germany (6 percent).

Finland is well known as a nature tourism destination, as the main image of the country is largely based on nature and its attractiveness. Therefore, potential national and international consumers would be visitors seeking nature-based activities and wellness, making ecological choices. Germany, the Netherlands and the UK are considered strong nature and ecotourism consumers. Atlantic Europeans, and North Americans, are considered to be keen on sustainability considerations when travelling. The Chinese and Japanese segments are also growing. These could all be potential customers. These are potential customer groups to North Karelia, perhaps those who like Finland but may not be aware of what North Karelia can offer.

Iceland

The Promote Iceland report based its finding on seven marketing areas: UK, Germany, Switzerland, France, Denmark, USA and Canada. These currently constitute the biggest markets for Iceland, and are therefore considered to be the key consumer markets. There are of course key emerging markets such as China and Japan, but these tourist markets are still small in numbers.

Scotland

For Scottish tourism, the UK remains the biggest market, representing 81% of trips and 61% of spend (2016). International markets are also extremely important to Scottish tourism - foreign visitors tend to stay longer than domestic visitors and their total expenditure during their visit is higher. VisitScotland identified the core markets as:

- UK – Primary: London, south east, north east and north west England. Secondary: Scotland.
- The USA.

· Germany, Netherlands, Spain, Italy and France – with particular focus on areas served by direct flight routes.

Case study: USA

Research from VisitBritain highlights the importance of 'uniqueness' to American visitors: an experience they cannot get elsewhere. Scotland has certain advantages, as to American customers it is perceived as being rich in history and culture and with beautiful landscapes. Family connections are also important.

'Scenery and landscape' and 'history and culture' are the two biggest motivators for American visitors. While Scottish food and drink, for example, and the unique built heritage are also important, it is recognised that meeting with locals is a key part of their holiday experience, and these interactions need to be facilitated. Inspiration for visiting a new destination overwhelmingly comes from a newspaper, magazine or web site.

In 2017 Europe provided the largest single market area for visitors to Scotland with 1.9 million visitors or 59% of all international visitors for that year. European visitors increased +16.8% in 2017 with their expenditure reaching £1.1 billion, a growth of 36.3% year on year. North American visitors totalled 681,000 trips spending £646 million, an increase of 13.4% in visitors with a modest 0.9% growth in spend. Visitors from 'other countries' including Australia, New Zealand, China and India also grew in 2017 and accounted for 638,000 trips and £496 million spend, a growth of 21% trips and 31.5% spend (VisitScotland, 2019).

Norway

According to a 2017 Innovation Norway report, the Norwegian domestic market accounts for over two thirds of the 33 million overnight stays, and the major overseas markets are Germany (1.7m) and Sweden (1.2m). Some of the more traditional markets for Norwegian visitors, such as Sweden and the UK, have declined recently, while the biggest growth markets were South Korea (up 37% from 2016-17), the USA (35%), China (27%) and Russia (21%). Indeed, from 2005 to 2017 the USA and Asia accounted for half of the growth, and tellingly, visits from these regions are much more consistent across the seasons than from other regions, the rest of Europe included.

The four most important activities in Norway for these foreign visitors are to 'experience nature', 'have fun', 'experience the fjords' and 'experience the mountains'. Internet searches associated with 'Norway' focused on elements such as its natural beauty and more specifically the fjords, glaciers and the Northern Lights, as well as different types of accommodation and outdoor activities.

In terms of the Trondelag region, of the 0.5m foreign overnight stays 31% came from Germany, 16% from Sweden and 6% from Netherlands – the biggest overseas markets. There were four times as many domestic visitors as foreign.

How to Reach these Consumers

Accessing information

The EC's *Flash Eurobarometer 432* (2016) illustrates that when consumers plan their travel the three most important sources of information, in 2016, were: recommendations from colleagues, friends or relatives, online sources (specifically web sites), and thirdly personal experience (Figure 1). The fast pace of technological change will have undoubtedly changed this landscape, with social media sites much more prevalent; for many they will be the key means of sharing recommendations, not only with friends and relatives but also the wider networked community.

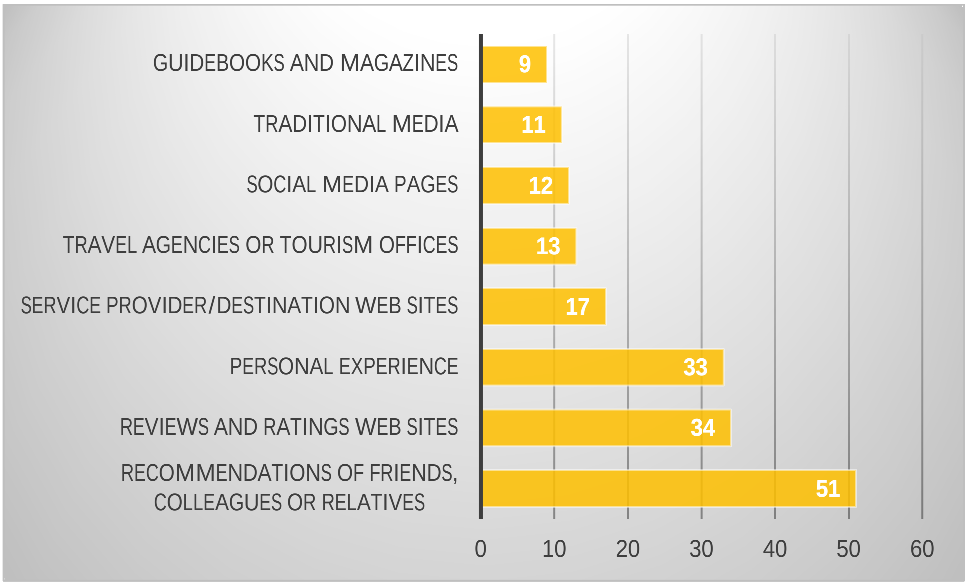

Figure 1: Most important information source when making travel decisions (EC, 2016)

Marketing in a different way

Rather than offering different products and segmenting the market according to nationalities alone, industry experts believe businesses should be packaging and marketing existing products in a different way, in order to engage communities and offer experiences to visitors in new ways. Marketing needs to be more individual and around age group and common interests, particularly understanding passionate interests and closely held values.

For example, VisitScotland (2017) has identified ways for tourism SMEs to win customer business, using the example of millennials:

- Be unique but authentic – concept-based accommodation will be increasingly popular with this generation. Any accommodation provider can be successful if they promote and deliver authentic local cultural experiences.

- Bring everyone together – create gathering spaces, events or opportunities where they can mingle with other customers and a local community.
- Accommodate groups – there is an opportunity for tourism companies to provide group promotions and services that allow for easier group or small event planning and booking via websites and social media.
- People will also buy from businesses they can relate to, those with similar beliefs, values and sustainability practices.

Mobile phones in the booking journey

Nearly 63% of the population owns a smartphone and on average spends between 3.5 to 5 hours using it daily. Google conducted a study with PhocusWright in 2018 to discover how mobile phones are used by potential travellers. Findings of this study confirmed that researching destinations, hotels and airfares on a mobile device is now as normal to users as online shopping.

Customers are comfortable researching, booking and planning their entire trip to a new travel destination on a mobile device. Top consumer markets displaying this trend include India who came out top with 87%, Brazil (67%), Japan (59%), South Korea (53%), US (48%), Australia & United Kingdom (45%) and France (44%).

Mobile devices also lead to a greater propensity to book at the last-minute. Google Data shows that travel-related searches for “tonight” and “today” have grown over 150% on mobile, over the past two years.

The customer experience on a mobile device can vary because of external factors such as roaming charges, patchy coverage and unsecure wifi connections. It’s also important to consider that mobile devices and their capabilities vary because of screen size and hardware constraints. Typically a mobile user will be looking to check prices, availability and make a quick last-minute booking (Trekksoft, 2019).

Personalisation

According to Trekksoft (2019), we now have so much data on our customers as they go through various touch points of our website, booking process, rebooking and reviews, revealing how to target them based on their personal requirements. According to Google Research, ‘57% of travellers feel that brands should tailor their information based on personal preferences or past behaviours’. The same research also confirmed that ‘if a travel brand tailored its information and overall trip experience based on personal preferences or past behaviour, 36% would be likely to pay more for their services’ (Trekksoft, 2019).

Personalisation can be achieved through direct communication through messaging apps – a direct and fast way to speak to customers – while chatbots and machine learning are saving businesses time and resources while still giving customers useful answers in a timely manner.

Product differentiation

From a SHAPE perspective, market concepts need to be developed that showcase eco-tourism initiatives/biosphere experiences as a joined-up experience centred around learning new skills, history, stories, culture and music, to further broaden the appeal. From the product perspective, increased differentiation and options for travellers have come to redefine the once staid idea of a tour. As travellers have come to expect more personalized offerings from hotels and airlines, they are also looking to find unique activities, such as involving local residents as creators, maintainers and major influencers of visitor experiences.

According to Skift's *Tours and Experiences: The Next Great Untapped Market in On-line Travel* (2018) consumers still think more complex and intricate tours are the same old bus and group tours they are used to. The sector must use marketing to teach consumers that they are innovating and offering a diverse set of experiences that defy expectations. As the sector fully embraces online booking and devises new forms of experience for customers, the old concepts of what exactly a tour is will shift.

Tours and activities tend to be one of the last components of a trip actually booked, despite many consumers' desires for unique and authentic experiences. For example, Skift found earlier this year that 35% of travellers have used mobile phones to book a tour or activity while already 'in destination', with TripAdvisor dominating with just over half of the bookings. Trekksoft also found that just 19 % of tour bookings are made more than a month before a trip. Taken together, these data points make it clear that there is a huge opportunity for digital platforms to revolutionize how tours are marketed and sold.

Case study: German booking trends (VisitScotland, 2018)

- German visitors plan and book further ahead than the EU average, a trend mirrored by travel trade.
- German visitors are more likely to book their holiday as a package.
- Over the last 10 years, more holidays were booked directly with providers or portals; tour operator bookings remain stable: 37% is booked directly with providers, 18% via portals incl. airlines and 45% with tour operators and travel agents.
- Online bookings show strong growth - not just on-line travel agencies, but also tour operators, travel agents and providers themselves: about 40% of holidays by Germans are booked online, 60% offline.
- Destination management organisations are widely used by German tour operators to package itineraries or as bed banks; this affords these companies considerable influence over the available tour product.

Karelia

Many of the primary research findings reported in this document are geographically-specific and are presented in more detail in *Transnational Marketing Report: A Case of North Karelia Biosphere Reserve.*

A precis of the most generalised findings suggests that in regard to aspects of importance when considering and deciding the destination of travel, **scenic/beautiful landscapes** was the most important aspect among respondents, followed by **unspoilt nature**. The **overall cleanliness of destination** and **diversity of nature attractions** (e.g. national parks or nature activities offered) followed respectively. The **environmental responsibility of product or service providers**, **easy accessibility to destinations**, **ease of transportation**, and **diversity of cultural attractions** were also deemed of importance when deciding the destination of travel (see Figure 2).

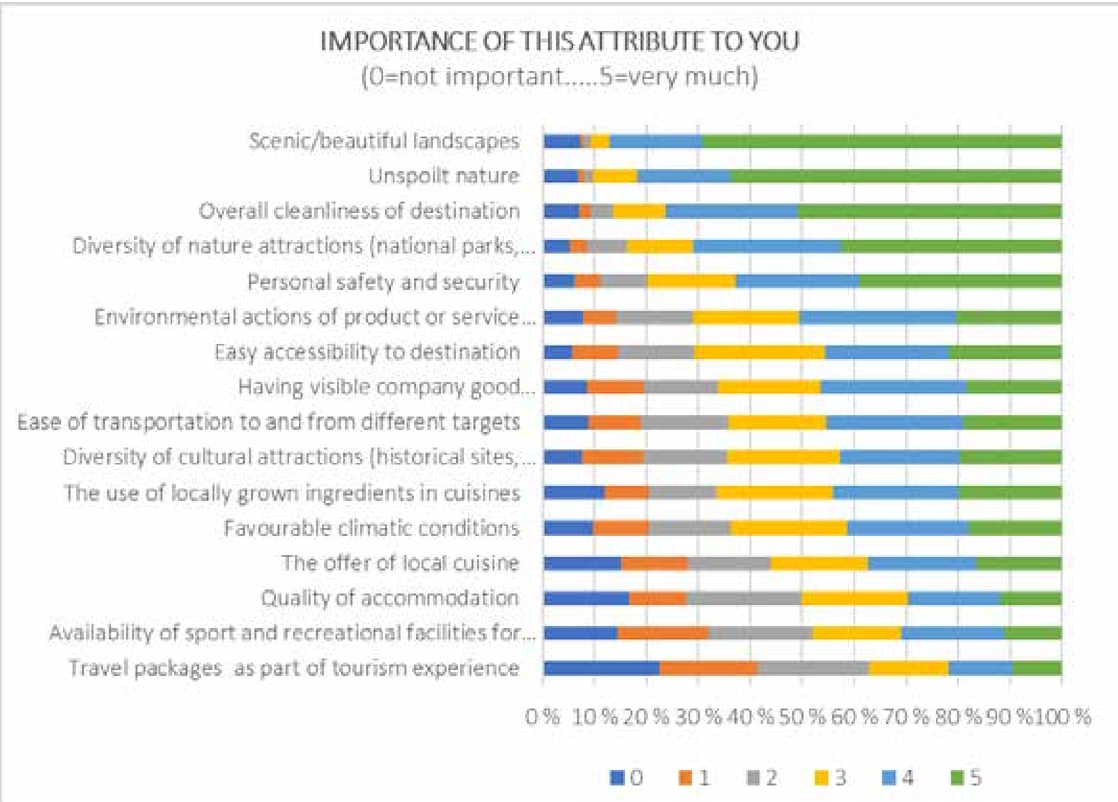

Figure 2. Values & considerations when choosing travel destination

The respondents were then asked how the values considered by them prior to booking travel were met while ‘in destination’. **Scenic/beautiful landscapes**, **unspoilt nature**, **overall cleanliness of destination**, **personal safety and security**, and **diversity of nature attractions** were the top five aspects considered outstanding.

When asked what nature/cultural places stood out in the area of visit, **scenic/beautiful landscapes** were most mentioned by the respondents, across all three targets of Lieksa (Koli, Ruunaa and

Patvinsuo). Sunsets and sunrises, lake and forest landscapes and trails were dominant terms used in describing the experiences. The Koli national park as whole was deemed an important part of Finnish culture and natural heritage.

Wester Ross Biosphere

Results

1 - Age of those surveyed

Wester Ross attracts largely mature visitors, with half respondents aged between 46 and 65 years old, and only 16% aged under 35.

2 – Length of stay

Despite the change of tourism and the increase of visitors driving the NC500 (Highlands and Islands Enterprise, 2017), 35% of respondents (180) were staying a week or more and another 19% three nights. Therefore, there is still a good balance between short and long stays.

3 – Before the trip: how did you hear about Wester Ross?

This question aimed at understanding through which channels visitors were persuaded to spend their holiday in the area: 7% internet, 28% as part of NC500, 40% were repeat visitors, 18% word-of-mouth and 7% via social media.

4- Means of transport whilst in Wester Ross:

59% of respondents travel by own car. Meaning most tourists come from the UK? 23% of tourists are travelling by motorhome/campervans.

5- Motivations for visiting:

Landscape was the most frequent answer, followed by sightseeing and wildlife, which are therefore still related to landscape.

6 – Level of general satisfaction:

92% of respondents are very or definitely happy with their holiday.

7 – Tourism facilities' level of satisfaction

68% of visitors said their accommodation was very good or brilliant. Another 18% said it was good and only 7% expressed a negative opinion.

82% think the offer of cafes and restaurants is good, very good or brilliant.

Attractions were rated as brilliant (41%), very good (26%) and good (18%).

8 – Average spending

29% of visitors would spend up to £30 for accommodation, this answer is likely to be from visitors with a motorhome/campervan. However, more than 50% would spend between £30 and £120. Only 8,64% spend more than £120 pounds. This last result may lead to think Wester Ross is not an attractive area for luxury tourism. 52% of visitors would spend between £15 and £50 in activities, while 25% would spend up to £15. Only 18% expressed willingness to pay more than £50 up to £150.

9 – Tourist tax

66% would pay a tourist tax of approximately £2/day if the revenue was ring-fenced to local community projects.

10 – Overall experience on the roads

75% of respondents said their experience on the roads was good, very good or brilliant. This means visitors generally did not identify relevant issues related to the road infrastructure.

11 – Opinions of visitors on specific aspects concerning the road infrastructure.

63% said it was good, very good or brilliant; 12% expressed a *negative opinion*.

Condition of roads: 62% think the roads are in a good, very good or brilliant condition. 35% said they are decent, bad or terrible.

81% are happy with the amount of information available and signage.

12 – Built environment:

Visitors were asked on their perception about built environment in Wester Ross, on a scale from 1 (run down) to 6 (well maintained). Most respondents have the perception of a built environment which is taken care of. Therefore, It seems that there are no significant issues related to this aspect.

13 – Use of public transport

Only 9% used public transport. Most popular ones were: bus (37%), ferry (37%) and train (26%).

Visitors were then asked if they would use more public transport if they could, and almost half of respondents (45%) said yes. A more frequent service might be worth to reduce traffic issues identified by residents of the area and previously described in this report.

14 – Which aspects are considered the most important ones by tourists when visiting Wester Ross?

The following were identified:

- Learning about local culture and history
- Getting involved in local culture and meet local people
- Open access and the right to roam
- Learning about the natural environment

Results showed that the four aspects considered appear relevant to respondents. It's interesting to highlight that tourists think it's important not only to learn about local culture, but also getting involved and meeting local people. Landscape is the attraction number one, according to previously discussed results, and majority of respondents thinks it is important to learn about the natural environment. Therefore, during the planning process a major focus should be put on landscape, its conservation and sustainability of tourism.

15 – Future visit:

88% said they plan a return visit to Wester Ross. This result confirms that overall tourism in Wester Ross meets the expectations of visitors and can therefore be retained successful. Only 1% said he/she would not return.

16 – Suggestions on improvements:

The question aimed at identifying major issues concerning tourism facilities in Wester Ross. According to the results, public toilets in the region don't seem to meet the demand of tourists. On a more limited extent, respondents think roads should be improved together with a better cafes and restaurants offer.

17 – General suggestions:

These include:

> "A sense of identity for the area seems missing to me. A branding exercise perhaps?"
>
> "More opportunities for indoor entertainment for family should weather be inclement"
>
> "More facilities for cyclers along the roads"
>
> "The introduction of a European fares system to accommodate the growing number of motorhome / campervan tourism
>
> "Provide more campsites and deter wild camping where sites are available"
>
> "Please don't advertise too much as long as the infrastructure can't cope with the masses of tourists"
>
> "Stop large tour buses using Highland roads"

The aim of this data gathering exercise was to develop a better understanding of which consumers to target and how to market to them. This discussion regarding the implications of this research exercise is divided into three parts:

- An understanding of key tourism trends.
- What elements of ecotourism enthuse consumers and what do they seek from such experiences.
- The most effective ways to promote ecotourism products to these key consumers (complemented by the separate SHAPE social media strategy.

Key Tourism Trends

Global Travel Trends

The following sectoral trends were identified in the research:

- Sustainable travel, with travellers seeking environmentally conscious options.
- An increase in the number of solo travellers.
- Visitors immersing themselves in the destinations they visit.
- Physical and mental wellness are key motivations for many travellers.
- More consumers wanting a unique once-in-a-lifetime experience.
- Making a country, as a destination, far more compelling than only one or two key places.

Tourism Product Trends

Key to ecotourism development are these product trends identified:

- Ecological tours.
- Foodie holidays.
- Increase in trail tourism.
- Increase in products for solo travellers.
- More products for female travellers.

Key Consumer Trends

It is considered that ecotourists are likely to share many or all of the following traits, reflecting current consumer trends:

- Travelling with 'empathy' – with respect, responsibility, compassion and understanding for the environment and for communities.
- Being well-educated and having above-average income.
- Having a desire to acquire and share social capital, through social media.
- Being aspiring nomads who seek nature experiences as an antidote to their urban lives.
- An openness to pursue more ethical travel.
- A desire to 'get lost' and find themselves.
- A move towards a 'sharing' ethic: attracted by AirBnB, for example, rather than staying in a hotel.

Targeting Key Consumer Markets

As the 2019 research for the ETC illustrates, Europe is well positioned and perceived as a destination for the immersive exploration typified by ecotourism experiences.

According to horizon scanners, retail will continue to be driven by the needs of two prominent generations: *baby boomers* and *millennials*. Baby boomers are characterised as being more affluent consumers with a passion for trying something new and with more time to indulge in slower experiences. Millennials' general sense of adventurousness manifests itself in their interest in other exotic cultures, ethnic cuisines and novel activities often in remote places. Therefore, millennials are good at driving tourism to less visited areas, that other generations start to follow.

Core Ecotourism Themes

The following themes should help businesses to be able to develop appropriate products that meet consumer needs, desires and motivations:

- A feeling of escapism is a highly important motive and prompts a strong sense of de-stressing.
- Nature is a significant element and a strong contrast to many people's everyday lives. The opportunity to spend further time in nature is desirable.
- Both time alone in nature and time shared with friends in nature are important motives.
- A sense of having fun and freedom in the outdoors is important.
- Emotions such as joy and peacefulness are expressed in terms of the natural beauty of the landscape - these emotions are intensified when experienced through activities outdoors.
- Ecotourists are internally motivated and open to experiences that are unique, educational and nature focused.
- Ecotourists find wonder in the vastness of nature, one's proximity to nature and the folklore that enriches the natural environment. They talk about little details in nature and enjoy eating or trying foraged or wild food.
- The importance of trying somewhere, or something, new – with great potential for social media material.
- Longer stays, 'dwelling' in places, over frequent short trips should be encouraged, commensurate with the notion of slowing down.

How to Reach these Consumers

Tech-savvy travellers and younger generations tend to move fast, book late and are connected to social media. Businesses therefore need to be visible on the platforms they are using and understand the experiences they want. Therefore:

- Online booking is a must – half of AirBnB users are of the millennial generation.
- Start with a mobile website first – it will be increasingly beneficial to have mobile-friendly websites, enable mobile bookings and payments, convenient mobile charging stations and reliable and free access to fast internet. Mobile devices also lead to a greater propensity to book at the last-minute.
- Create inspiring content – think outside the box for innovative and fun content that inspires sharing and online engagement.
- Inspire with influencers – use influencers to tell your brand's story as they are able to target individuals involved in online communities built around specific travel passions.

Reference should be made to the complementary SHAPE report on effective use of social media.

Research suggests that ecotourism products should be promoted with the following in mind:

Guided Experiences

- The expertise of guides is a high value component of a guided trip and their knowledge of the landscape, environment and history can contribute much to the customer experience.
- Guides need to allow participants time and opportunity to (self-)reflect in nature.
- Opportunities should be found for sharing the stories of the day around a bar in the evenings. Such stories, augmented by photos, are likely to find their way onto social media sites.

More Demanding Consumers

- 'Value' is an increasingly important notion: not 'cheap', but good value for money.
- Consumers have increasingly high expectations and becoming more discerning, in terms of, for example, accessing information and the ability to book instantly and painlessly.
- It may be worthwhile looking at collaborating with food or accommodation providers for example, in order to create high-quality ecotourism packages.
- Similarly, augmenting a package with elements that cater for health and wellbeing can add value.

Effective Promotion

- A shift away from 'what there is to do' as an advertising message, to 'how it makes me feel'.
- Make more imaginative use of stories to sell products.
- Ecotourists are likely to believe in the power of word-of-mouth and urge others such as family and friends to give it a go.
- This is further supported by the enthusiastic embrace of social media platforms, which provide generally credible, free and effective marketing.

The Importance of Place

- Consumers are looking for uniqueness and ecotourism products should be created that they cannot experience so easily at home.
- The linking of the food and drink consumed back to the landscape or seascape through which customers have just travelled.
- The promotion of 'authentic', rewarding and high-quality experiences in beautiful landscapes and with a strong cultural element.
- And bad or cooler weather can be a point of difference for consumers – it has helped to shape both the landscapes and the lives of communities.