

The European market potential for wildlife tourism

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Wildlife tourism has been hit hard by the COVID-19 pandemic. However, as wildlife tourism requires spacious destinations, this niche market is expected to recover faster than others. The United Kingdom, Germany, and France are the largest European source countries for wildlife tourism. As Europeans are becoming more aware of the current climate crisis, the demand for sustainability is increasing. After COVID-19 the European market for wildlife tourism will offer many opportunities, with more tourists wanting to connect with nature and a higher demand for sustainable wildlife travel options.

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1. Product description

Wildlife tourism refers to travel that is concerned with the observation of, and interaction with, animal species at the travel destination. Wildlife tourism consists of three specialist niche markets and their respective passion groups.

Table 1: Overview of specialist niches and their passion groups

Specialist Niche	Passion Group	Examples
Safaris		
	4x4 Safaris	Asilia Africa takes you on safari with electric vehicles, powered by the operator's own solar panels. The silent vehicles minimise disturbance of wildlife and its habitat.

	Walking Safaris	Wild Rhino Tours in India and Bhutan provides walking and driving safaris combined. Tourists get the chance to spot snow leopards high up in the Himalayas.
	Fly-in Safaris	Impala Tours is a touring operator in the Netherlands. They offer a diverse range of fly-in safaris in various African countries.
	River/Canoe Safaris	Siyabona Africa offers canoe safaris in the Zambezi river where crocodiles, hippos and elephants can be seen on the regular.
Marine Life Watching		Planet Dolphin offers trips to look for spotted dolphins, humpback whales, sea turtles and manta rays. They educate their clients on the protection of marine wildlife and contribute to some sustainable conservation projects.
Wildlife Watching		Royal Active Travels in Myanmar organizes diving, boat, hiking, and cycling safaris.

Safaris, marine life watching, and wildlife watching are forms of non-consumptive tourism, consisting of a variety of wildlife observing activities. Non-consumptive tourism is only related to viewing and photographing animals that live freely in their natural habitat. Consumptive wildlife tourism is related to influencing wildlife's natural functioning by engaging in activities such as fishing, hunting, and animal-riding. These niches within wildlife tourism are likely to harm wild animals and their natural habitat.

This study focuses only on non-consumptive wildlife tourism. It provides an overview of the wildlife specialist niches: safaris, wildlife watching and marine watching. The report will further address reasons for Europe being an interesting market for wildlife tourism, which European countries offer the most potential, and trends that offer opportunities.

Tips:

- Inform yourself on the niches available in tourism to help you make a clear choice on the niche market you will focus on. CBI offers [an infographic which gives a clear overview](#) on all segments and niche

markets in tourism.

- Read the CBI studies on [nature tourism](#), [birdwatching tourism](#) and [adventure tourism](#), to be informed about opportunities within these related markets.

2. What makes Europe an interesting market for wildlife tourism?

7% of tourism worldwide is concerned with wildlife. In Africa this is 70-80%, with most of their international visitors being from Europe and the United States. However, the importance of wildlife tourism in Africa differs greatly per country. In Morocco, for example, cultural tourism is more important, while in Zambia and Kenya, wildlife tourism is most important. Countries such as Uganda, Zambia, Zimbabwe, Botswana, and Namibia receive mostly international tourists interested in wildlife. 80% of wildlife tourists in these countries are international. Most of these international tourists are from Europe.

Besides Africa, Europeans are increasingly travelling to the Asia-Pacific region for wildlife watching, being the second region, and rising in popularity. North America is third and South America is fourth. Around 58% of European tour operators provide wildlife watching activities.

COVID-19 travel restrictions and safety measures

Due to COVID-19 travel restrictions, the tourism industry decreased tremendously. Before the pandemic, the number of international visits globally was expected to reach 1.8 billion a year by 2030. Tourism has grown rapidly over the years before the COVID-19 pandemic, with a yearly growth rate of 3%. Now that this development has come to a halt, the wildlife tourism sector [is experiencing many job losses](#).

Because wildlife tourism often uses spacious destinations, it is expected to recover relatively quickly. When travel restrictions decrease, European tourists are likely to travel to destinations that feel safest with regard to COVID-19. For example, small chalets in national parks will likely be preferred over hotels and large group activities. Europeans with a middle to higher income are expected to travel first as travel restrictions become less.

Political circumstances and current affairs in destination countries

Europeans are very aware of current affairs in destination countries. Tourists are less likely to visit a country with unstable political circumstances or recent disastrous events. See the advice the source countries provide for citizens travelling to your country. For example on the [Dutch](#), [United Kingdom](#), [Swedish](#), or [Germany's](#) Ministry of Foreign Affairs page.

Tips:

- Learn about [managing the effects of COVID-19 on the tourism industry](#) to find reliable sources about Europe's COVID-19 situation. Read about [how to respond to COVID-19](#) for a step-by-step plan that can help you respond and recover from the effects of the COVID-19 pandemic.
- Focus on the local and regional market while Europeans can't travel. This might offer you the revenue to keep you in business. At the same time, you need to cut your costs. This can, for example, be done through working with students, or by decreasing the length of packaged tours.
- Target small-scale, specialised wildlife tourism companies in Europe. They will probably be amongst the first to send their clients to your destinations, because they generally have a very loyal clientele. For example, if you offer cycling safaris, target a tour operator in the in Europe that specialises in organising cycling travels.
- Invest in creating a packaged experience for tourists where they can engage in cultural, social, and wildlife activities altogether. Get into contact with your local community, other tour operators, and

destination management companies to collaborate on bringing all these activities together. This way, you can offer a large variety of services (for families) while keeping your focus on wildlife tourism.

Market segmentation

European tourists are experienced travellers, with most households taking at least one international trip per year. This makes them well-informed travellers with high demands. European wildlife tourists do not fall within a specific age range, and therefore make a very diverse group. Most European wildlife tourists are well educated and tend to spend more money because they earn higher incomes.

They enjoy travelling with their families or as a couple. Europeans are interested in travelling in smaller groups, because it contributes to a more unique and high-quality experience. Some tourists also enjoy travelling independently, meaning they will plan their trip as they go and do not make use of organised travel offered by tour operators. [Business travellers from Europe](#) also engage in wildlife activities, although it is not their main purpose for travel. Therefore, this last group is mainly interested in short trips (1-3 days).

European wildlife tourists are generally interested in intelligent and big animals, elegant animals and animals with vibrant colours. Furthermore, interest in lesser known and rare species is increasing. European tourists are also interested in seeing local predators, such as crocodiles, as long as a safe distance from the animals is maintained. Snakes and spiders are not as interesting for the average European tourist, as they are perceived as dangerous and scary.

European tourists are increasingly concerned with the well-being of wildlife and are willing to pay more to see animals in the wild instead of visiting zoos. They find it increasingly unacceptable when animals are used for entertainment purposes. Feeding animals or making them do tricks is considered unacceptable, because it is not how the animals behave naturally and is not good for their well-being. Swimming with dolphins is an example of an activity that Europeans find less and less acceptable.

European tourists care about tour operators and their ethics about animal welfare and are more likely to book their trips with tour operators that concern themselves with animal well-being as well.

European wildlife tourists value a unique experience. Personalised tours for European tourists cater to their need for a special holiday experience and add to the idea that their holiday is unique. Offering choices to your customers is beneficial, even if you know in advance which choices your customers will make. Personalising a holiday can be done in multiple ways, including:

- Offering building blocks, such as a walking safari, a cycling safari, and visiting a local village. Let the choices and sequence be determined by your customers.
- Providing options. For example, let your customers choose between a shorter and a longer trail.
- Talking to your clients to make an inventory of their wishes, and coming up with an attractive proposal.

European tourists are also highly interested in learning more about any wildlife they encounter during their tours, to expand their knowledge. Offering a lot of information is therefore essential. Keep in mind that the amount of information that is preferred differs per group of tourists. Therefore, it is important to keep asking your clients about their preferences.

Furthermore, European tourists find it important that the money they spend at their wildlife travel destination gets reinvested in the local community to help them support themselves and the conservation of local wildlife. [Friends of Wallacea](#) is an example of a touring operator that makes sure the money from tourists is spent on supporting the local communities and their efforts to conserve the local environment. The travel guides are from the local community and can provide a lot of information about the local wildlife.

European wildlife tourists can be divided into enthusiastic and casual wildlife tourists:

Wildlife enthusiasts

These tourists tend to be more knowledgeable about wildlife and are interested in further information and education about the wildlife and environment they are visiting. They tend to spend 5-7 days at one destination. These tourists travel more independently by booking activities locally instead of going on organised trips. Many enthusiastic wildlife tourists are [independent travellers](#) who do not make use of tour operators to decide what they want to do on location.

Wildlife enthusiasts are usually fit and actively participate in wildlife watching. They appreciate a knowledgeable guide who can teach them about the local animals and environment. They have a wider range of interests when it comes to animals, and are interested in more special and rare species.

Wildlife enthusiasts are often loyal and come to the same destination multiple times to discover and learn more about wildlife they may not have seen during their last visit. As these tourists are more informed about wildlife, they also tend to have higher sustainable awareness and care a lot for animal welfare. Many of these tourists are members of nature-related organisations such as, for example, the United Kingdom's [Wildlife Trusts](#).

Good-quality or even professional cameras are often used to photograph the animals. Some wildlife enthusiasts, such as professional photographers, travel for professional purposes. Many enthusiasts bring along their families or friends on their holidays. These family members or friends are also interested in wildlife, but usually don't have very specific interests, and fall in the casual wildlife tourist profile.

Casual wildlife tourists

Casual tourists are interested in more iconic animals, such as "The Big 5". They are interested in basic information about the animals and their habitat but are less interested in learning about special or rare animals. They are also interested in activities that are not related to wildlife watching. In Kenya for instance, most wildlife trips for this target group are combined with [sun and beach activities](#) at the end of their stay.

The social element of travelling and wildlife watching is very important for casual tourists. Organising group or family activities with a guide that can provide general information on the animals and their habitat is important. Next to that, providing a broader range of activities can attract tourists whose main goal is not to experience wildlife. Casual tourists tend to stay for a shorter amount of time than wildlife enthusiasts.

Tips:

- Ensure that you offer enough information about the various animals, the environment and sustainability for enthusiastic wildlife tourists.
- Market to casual tourists through tour operators that offer packaged holidays with a variety of cultural, social and wildlife-related activities. Market to wildlife enthusiasts directly on location as well as through tour operators. Read about [the opportunities in the European FIT tourism market](#) to learn about how to accommodate independent travellers on location.
- Ziplining, hiking, cycling and setting up campfires are examples of activities that can be provided for wildlife tourists to enhance their travel experience with more variety. This is especially interesting for casual wildlife tourists.
- Get to know your visitors personally, both before and during their trip, to make the most out of their experience. Europeans enjoy organised trips that are catered to their specific demands. If possible, the best way to learn about your clients' needs is by a call or email.
- Make sure to be aware of how to treat wildlife ethically when offering wildlife watching activities. The Travel Association established for British tour operators (ABTA) provides a [guideline on how to manage animal welfare in the tourism industry](#).

3. Which European countries offer most opportunities for wildlife tourism?

The United Kingdom, Germany, and France are the most important European source countries for wildlife tourism in terms of market size, followed by Spain, Italy, and the Netherlands.

The demands of wildlife tourists from different European countries do not differ much. However, different countries in Europe have different travel prospects because of the COVID-19 vaccination rates. The European Commission aims to have 70% of all Europeans vaccinated by the end of September 2021. Currently, most countries are not likely to meet this target. This could change, depending on logistic improvements or changing target groups for vaccination.

Middle to higher-income households are expected to travel long distances sooner than lower income European households after the travel restrictions are lifted. It is expected that Europeans can travel again when COVID-19 is under control, which largely depends on vaccination rates. See this [live data tracker](#) to stay informed about the percentage of vaccinated people per European country. A higher vaccination rate may reduce travel restrictions.

United Kingdom

Wildlife watching is becoming increasingly popular among British tourists. According to data [provided by World Animal Protection](#) the percentage of British citizens that have taken part in any wildlife activity abroad has increased from 23% in 2014 to 32% in 2019. Most of them (85%) agree that tour operators should avoid activities that cause suffering for wild animals. 87% of the British citizens prefer to see animals in the wild rather than in captivity.

The United Kingdom is the largest European wildlife tourism source country. Before the pandemic, the average British travel budget in 2020 was €2,108 per trip. They are the largest spenders on international travel. British travellers prefer booking packaged holidays, with around 50% of international travel from the United Kingdom being packaged holidays.

The length of stay for the average British international traveller is 10 nights. The most profitable age-group is between 25 and 55 years old, with little difference in expenditure within this age range. Age groups that fall below and above this range both spend significantly less while travelling internationally.

The United Kingdom currently has the highest vaccination rate, with 49% of the adult population having received at least one vaccine in April 2021.

Germany

Germany is the largest European source market in international tourism. According to data [provided by World Animal Protection](#) the percentage of citizens that have engaged in any animal activity abroad, has increased from 22% in 2014 to 25% in 2019. When attracting German tourists, it is important to respect animal welfare. Most Germans (88%) agree that tour operators should avoid activities that cause suffering for wild animals.

Germans are dedicated travellers and very much enjoy going on holidays. Germans spend the most money during international travel, compared to other European tourists. 74% of Germans go abroad for holidays, and over 50% of German travellers book activities through a tour operator. German tourists enjoy spending their holidays in warm and sunny countries. In 2018, 5% of [German international travellers](#) travelled to Africa for their holidays, 25% travelled to Asia or the Asia-Pacific region and 15% travelled to the Americas. The average budget for international travel in 2020 was €1,583

Germans usually go on organized trips and prepare well. They generally book their trips online. Although they

prefer less active holidays in comparison to, for example, the Dutch, natural attractions (36%), nature park visits (32%) wildlife viewing (30%) and hiking in nature (26%) are [their favourite holiday activities](#).

Germany is a forerunner in sustainability and therefore German tourists are likely to care most for sustainable wildlife tourism activities, with 56% of the German population believing that [ecological and social sustainability are important factors](#) to consider when going on holidays. According to data [provided by World Animal Protection](#), 88% of the Germans feel that tour operators should avoid activities that cause suffering for wild animals.

Germans are exceptionally well organised, being well-informed about their destination before they travel. Punctuality and well-organised trips are especially important for them.

The German vaccination rate is much lower than the vaccination rate in the United Kingdom, with 21% of the adult population having received at least one vaccine in April 2021. If the speed of vaccination continues at this pace, there is a possibility that the travel restrictions will stay in place for a longer time.

France

Most French people like to go to French-speaking holiday destinations like Madagascar and the Republic of Côte d'Ivoire. Therefore, when French is a major language, France is likely to be among the main source countries. French travellers between the ages 25 and 55 offer the largest market for international travel. French tourists usually go on wildlife trips with their families. They also tend to spend their holidays at [two or more destinations per trip](#).

The average French travel budget is €1,522. French people mainly base their travel destinations on the value they get for their money, available outdoor activities, and locations that are suitable for the whole family. The French care more for high quality travel packages than other Europeans. Many French people book their holidays through tour operators and prefer to exclusively experience their holidays with their own travel party.

International travel to areas outside Europe has increased, highlighting Asia, the Pacific and Africa as interesting destinations.

19% of the adult population has received at least one vaccine by April 2021.

Spain

In 2020, the average travel budget for Spanish tourists was €1,583. Spain has been badly affected by COVID-19 and the Spanish are the most concerned with their health, compared to other countries.

The Spanish have a high preference for Spanish speaking guides and are more likely to arrange their travels with a tour operator than the other countries in this top six.

21% of the adult population has received at least one vaccine by April 2021.

Italy

Just like the Spanish, Italians prefer to book their travels via a tour operator and especially value a tailor-made holiday. Many Italians also tend to travel in larger groups, often with large (multi-generational) families, and prefer an Italian speaking guide. It is often hard to fulfil the needs of different family members with different wishes. Also, margins are generally lower for larger groups. However, their large group-sizes offer some economies of scale.

19% of the adult population has received at least one vaccine shot by April 2021.

The Netherlands

Wildlife watching is becoming increasingly popular among Dutch tourists. According to data [provided by World Animal Protection](#) the percentage of citizens that has taken part in any wildlife activity abroad has increased from 28% in 2014 to 30% in 2019.

The average Dutch outbound tourist between 45 and 64 years old spends €1,687 on travel. They enjoy socializing with other travellers during their holiday. Dutch people speak English well and often understand and speak some German too.

21% of the adult population has received at least one vaccine shot by April 2021.

Tips:

- Learn about the European values and standards if you want to attract European tourists, because they care about their standards being met. They expect to leave on agreed times, have clean accommodation, and have the table set the way Europeans do it. Developing organisational skills to run your business is important to accommodate European tourists. These skills can be developed through a training programme, for example.
- Read [what the demand for outbound tourism is on the European market](#) to learn about travel behaviour of different European countries.
- Focus on the United Kingdom, Germany and France if you want to enter the largest European wildlife travel markets.

4. Which trends offer opportunities in the European market for wildlife tourism?

European wildlife travellers seek a connection with nature

Europeans enjoy travelling to remote areas to connect with nature. They want to experience nature rather than just observe it. People have become more interested in their local natural environment since COVID-19. The interest in taking walks and being in nature as a social and individual activity has increased. This increased appreciation of nature is likely to continue to some extent as COVID-19 regulations decrease. People might be more interested in taking their appreciation for nature internationally when international travel is more accessible. The demand for wildlife tourism is expected to increase among Europeans in the coming years.

There is a decreased demand for luxury goods and services in and around accommodations, as this is considered as being at odds with the natural environment. Accommodation for tourists needs to provide the necessities such as drinkable tap water, needs to live up to basic hygienic standards, and needs to be free of bugs. Some Europeans crave a “digital detox”, where they do not want to be disturbed by their phones or incoming emails during their travel.

European tourists seek a connection with nature that is special and unique. This way tourists feel more connected to their holiday experience. Europeans’ demand for tailor-made trips has increased over the past years. They want to be taken off the beaten track and look out for wildlife in alternative ways. Alternative ways in which Europeans like to experience wildlife are:

- Guided walks or cycling. Most Europeans like to be physically active while enjoying wildlife, without the constant noise of vehicle engines. This way, tourists can engage with nature even more. Make sure you can guarantee the safety of your clients when offering such a tour.
- Canoeing, kayaking or enjoying a [river cruise](#), which allows tourists to see wildlife from the water. Most

Europeans will find this idea even more appealing if you can offer trips via locally used transportation, such as a [mokoro](#), which is used in some African countries.

- Hot air balloon safaris, which are offered for example in Kenya and Tanzania, offers tourists the opportunity of [experiencing wildlife from the sky](#). An alternative is experiencing wildlife by using a glider.

Figure 1: tourist enjoying nature with a glider



Source: [Unsplash](#)

Figure 2: hot air balloon safari



Source: [Unsplash](#)

European tourists care about the wellbeing of wildlife

When going on a wildlife safari, European tourists enjoy a natural encounter over a forced encounter set up by the tour operators. Tourists also care for the animals' well-being and would rather leave without seeing the animal for which they came for, than having a forced, set-up encounter.

According to data [provided by World Animal Protection](#), European tourists are finding it less acceptable to swim with dolphins and visit zoos or aquariums, and the number of people doing these activities for fun is decreasing. Most Europeans nowadays prefer seeing animals in their natural habitat. They are often willing to pay significantly more to see animals in the wild.

Europeans are interested in learning about local wildlife and their habitat. Going on tour with a knowledgeable guide is important for them so they can ask questions and learn more about how they can help conserve specific species or the environment in general. Therefore, it is important to offer information on how you conserve the wildlife's habitat and tell people how they can do this at home. This connects to European tourists' values and makes them engaged with the experience. [Biosphere Expeditions](#) is an organisation that organises "citizen-science conservation expeditions". They organise trips where they do research on wildlife and let tourists be part of the research process.

Digitisation is influencing the wildlife market for both tourists and tour

operators

Social media has a large influence on wildlife tourism, especially among [tourists from generation Y and Z](#). Experiences of individual tourists are shared with their followers on their [Instagram](#), [Facebook](#), or [TripAdvisor](#) accounts. Tourism organisations themselves often also have their own accounts to post updates about wildlife (such as when a baby lion is born), or use social media platforms for marketing.

These platforms allow for real-time engagement with past, current and potential visitors. They also allow for direct feedback from tourists. Instagram is getting more important as camera equipment is advancing. People are interested in taking good pictures of wildlife that they can post on Instagram or show their friends at home. Read our study [How to be a successful touring company online](#) for more information.

Since 2017, Instagram has been alerting users when they are looking at pictures or searching hashtags related to animal abuse or selling wild animals. Users can report photos that depict animal abuse and there is speculation that Instagram and other platforms are working on machine learning tools that can identify photos that indicate wildlife abuse. As European tourists care about animal welfare, the developments to detect animal abuse will be ongoing.

Virtual Reality, smartphone apps and headset guides are technological tools that are becoming increasingly important to enhance the tourists' experience. These are useful tools that help provide educational information and explain safety measures while wildlife watching. An example of a tour guide app is [Voice Map](#). This app helps you create audio tracks for tourists on tour. It makes sure tourists stay on the right track, and provides information according to the tourists' GPS location. It is suitable for walking, cycling, driving, and boat tours.

European are becoming more conscious about sustainability

European tourists are becoming increasingly concerned with climate change and are taking more action in their daily lives to be more sustainable through eating less meat, using less plastic, or buying more organic products, for example. The demand for sustainable travel destinations is likely to increase as well.

[WAYO Tanzania](#) is a wildlife tour operator that showcases the actions they undertake to be environmentally sustainable, like setting up green tent camps, eliminating plastic waste and making use of decomposing toilets. They also support local NGOs that support child education and buy from local food suppliers to impact the local economy in a sustainable way.

Multigenerational travel is increasing among Europeans

European tourists are becoming more interested in travelling abroad with their larger family, including grandparents and grandchildren. This creates a need for destinations that can accommodate all generations' needs. See the study on [the opportunities in the European multigenerational tourism market](#) to learn more about how to accommodate all family members.

[Africa Endeavours](#) is an example of a tour operator that offers various holidays with activities that are suitable for the whole family. They bring tourists to see the Cape Winelands, the Garden Route, and also include driving safaris and marine watching at the bay.

Tips:

- Develop an appealing offering by adjusting to new trends. An example could be a 'digital-detox experience', where tourists travel to remote areas to connect with nature and watch wildlife.
- Focus on partnering with small European tour operators to avoid standard package holidays and create more personalised package holidays that appeal to individual tourists or families. This way you can focus on making the tourists' holiday a truly unique experience.
- Offer tourists to credit them when you post their pictures on your website or social media pages to make them feel connected and to attract potential visitors. Get help from your network to build a

professional website, app, or social media presence to help reach and connect with your audience.

- Get accredited certifications to communicate to visitors that the activities or products you are providing are sustainable. For example, the [Fair Trade Tourism](#) certification provides certificates for social, economic and environmental sustainability, and provides separate certificates for sustainable accommodation, activities and food services. The [Whale Heritage Site certification](#) is a certification for sustainable whale and dolphin watching destinations. Read about [how to enter the European market for nature and ecotourism](#) to learn more about sustainable certification.
- Pay attention to the individual demands of Europeans and cater to their needs. This makes European tourists feel like their travel experience is unique and cared for.

This study was carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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