ESTONIAN UNIVERSITY OF LIFE SCIENCES
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PREPAREDNESS OF ESTONIAN NATURE TOURISM COMPANIES TO OFFER THEIR SERVICES TO FOREIGN VISITORS

Master's thesis
Curriculum in Nature Tourism

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There are several possibilities for Estonian nature tourism companies to offer their services for foreign visitors but only few, who, in addition to domestic tourists, also focus on international clients. The aim of this thesis is to give an overview of the Estonian nature tourism business sector and map the extent of the resources and knowledge of Estonian nature tourism companies (NTC) to market their services and offer high-value services to international visitors. To fulfil the aim of the thesis interviews with representatives of Estonian nature tourism companies, Enterprise Estonia and the NGO Estonian Rural Tourism were conducted. The quality of nature tourism company webpages and Visit Estonia webpage data were analysed. The most commonly used marketing channels are Facebook, Visit Estonia webpage, travel agencies/tour operators. The effectiveness of marketing is not measured by the NTCs in a clear, continuous way and is thus not systematically integrated to their business plans. The Estonian nature tourism sector lacks several strategically important resources and knowledge for marketing and offering high-quality customer services. However, most companies are interested in increasing the number of international clients. Further research into this can be conducted including gathering data on international clients' expectations of using the services of Estonian NTCs and more widely on international tourists' expectations and perceived destination image of Estonia overall, which would be useful for creating better marketing strategies.			
Keywords: nature tourism, high-quality service, international marketing, GAP-analysis			

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Eesti loodusturismi ettevõtetel on mitmeid võimalusi pakkuda oma teenuseid välisklientidele. Lisaks siseturistidele on vähesed ettevõtted keskendunud ka välisklientidele. Käesoleva magistritöö eesmärgiks on anda ülevaade Eesti loodusturismi sektorist ning kaardistada Eesti loodusturismi ettevõtete ressursid ning teadmised oma teenuste turundamiseks ja kõrgekvaliteedilise teenuse pakkumiseks. Eesmärgi täitmiseks viidi läbi intervjuud Eesti loodusturismi ettevõtete, Ettevõtluse Arendamise Sihtasutuse ja MTÜ Eesti Maaturism esindajatega. Hinnati loodusturismi ettvõtete kodulehtede kvaliteeti ning analüüsiti Visit Estonia internetilehekülje andmeid. Turunduskanalitena kasutatakse kõige rohkem Facebook-i, Visit Estonia internetilehekülge, reisikorraldajaid ja -operaatoreid. Eesti loodusturismi ettevõtted ei hinda turundustegevuse efektiivsust süsteemselt. Seega, ei ole see ka nende äritegevuse plaani süstematiseeritult integreeritud. Eesti loodusturismi sektoril puuduvad mitmed strateegiliselt olulised ressursid ning teadmised turundamiseks ning kõrgekvaliteedilise teenuse pakkumiseks. Küll aga suurem osa ettevõtteid on huvitatud välisklientide arvu suurenemisest. Edasised uuringud välisklientide ootustest loodusturismi ettevõtete teenuste kasutamises, välismaalaste ootustest Eestile ja tajutavast sihtkoha imidžist aitakvad parendada turundusstrateegiaid ja täiustada ettevõtete teenuste kvaliteeti.

Märksõnad: loodusturism, kõrgekvaliteediline teenus, rahvusvaheline turundamine, GAP-analüüs

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ABBREVIATIONS

AT – adventure tourism

ATTA – Adventure Travel Trade Association

B2B – business to business

B2C – business to consumer

EAS – Enterprise Estonia (Ettevõteluse Arendamise Sihtasutus)

GI – general interest

MT – NGO Estonian Rural Tourism (MTÜ Maaturism)

NTC – nature tourism company

SEO – search engine optimisation

SERVQUAL – service quality model

SI – special interest

SME – small or medium scale enterprise

TA – travel agency

TO – tour operator

TQM – Total Quality Management

UNWTO – the United Nations World Tourism Organisation

INTRODUCTION

Tourism is the fastest growing industry worldwide, with every 11th job placement being connected to tourism (UNWTO Tourism Highlights 2016: 3) in some way. International tourist arrivals reached a billion for the first time in 2012 while in 2015, international tourist arrivals grew by 4.4% reaching almost 1.2 billion, exceeding the predicted average 3.5% growth a year (Ibid.: 3). Compared to other fields of economy the distinctive character or tourism industry is continuous growth in capacity every year since records began (Butler 2009: 346).

There are approximately 3 million tourist overnight stays and another 3 million day visits to Estonia annually (Tourism – the Ministry of Economic Affairs and Communications). However according to Tõnurist and Sõstra (2015: 8), only 11% of overnight stay visitors used the services of guided tours, while 31% also chose activities in nature, such as hiking for example.

The rapidly growing nature tourism industry, gaining more and more in popularity, makes a considerable addition to economic growth. There is a wide range of nature tourism companies (hereafter: NTCs) in Estonia, however, while there are several opportunities for NTCs to offer their services for foreign visitors, there are only few who are, in addition to domestic tourists, also focused on international clients.

One of the reasons might be that the companies do not possess sufficient resources, network capacity or merely the know-how to market themselves. They might also be quite invisible to foreign tourists and travel agencies, since they are small and not easily found. Because Estonia is not a well-known nature tourism destination and the number of international visitors using services of NTCs is not high, then it can be theorized that the Estonian Tourist Board (hereafter: EAS) is not especially interested in investing in wide range of nature tourism marketing campaigns overseas. Therefore, the potential income for companies who could offer their services to foreigners will not be collected.

The aim of this thesis is to give an overview of the Estonian nature tourism business sector and map the extent of resources and knowledge of Estonian nature tourism companies to market their services and to offer a high-value service to international visitors.

There are four main research questions in this master's thesis:

1) Which marketing tools and channels are used by NTCs?
2) Is the effectiveness of marketing measured by the NTCs and how is this knowledge integrated into their business planning?
3) Which resources and what knowledge do NTCs lack in order to market themselves to suitable target groups and to offer a high-value service?
4) What are the interest of NTCs towards targeting and welcoming international tourists?

The thesis contains four main topics: 1) the literature overview gives an understanding of different types of nature tourism, trends in tourism, service quality, customers and marketing in that field, 2) materials and methodology, 3) results and 4) discussion give a thorough understanding of the topic of this thesis. There are two appendixes attached.

I wish to thank my supervisors, all the companies, Enterprise Estonia and NGO Estonian Rural Tourism representatives who participated in the research.

1. TYPES OF NATURE TOURISM

This thesis is focused on the companies that offer services in the field of nature-based tourism. To have a better grasp and understanding of the basis of this thesis' research there is a necessity to comprehend the terms involved.

Nature-based tourism and nature tourism

These two terms have slight differences. According to the United Nations World Tourism Organisation nature tourism is type of tourism where the main motivation is appreciation and observing the nature. This approach to nature tourism definition is customer/tourist-based, emphasising the needs and wants of a nature tourist. In a broader meaning nature tourism is usually explained by features of the setting or product, hence makes it product-based. It includes all forms of tourism where relatively undisturbed natural environments form the primary attraction or setting (Buckley & Coghlan 2009).

Nature-based tourism is similar to the product-based nature tourism definition. Nature-based tourism is tourism experience which is reliant of natural environment and needs land or a body of water. Hence, nature-based tourism services are offered in naturar environment but the motivation of nature tourist is not necessarily observing and getting to know the nature. In this thesis "nature tourism" is used in the wider meaning, similar to nature-based tourism. Therefore, ecotourism, special interest, wildlife tourism and adventure tourism are considered as parts of nature tourism. On table 1 are shown the types of nature tourism which are explained below.

Adventure tourism

According to Adventure Travel Trade Association (hereafter: ATTA) adventure tourism has to have at least two of these elements: 1) cultural immersion, 2) physical activity and 3) natural environment (Adventure Tourism Development Index 2015: 5). Kuresoo *et al.* (2010: 14) distinguish three elements of adventure tourism: 1) risk, 2) physical activity and 3) special skill set. Like all travel, it must include at least one overnight stay but not last longer than a year. There are 34 different types of adventure tourism which are considered either hard or soft. They are identified by the trip's primary activity. Hard adventure trips include 1) caving, 2) climbing and 3) trekking for example, while soft adventure trips are 1) backpacking, 2) canoeing, 3) orienteering, 4) kayaking, 5) horseback-riding, 6) sailing as well as 7) skiing and 8) voluntourism (Global Report on Adventure Tourism 2014: 12). Due to geographical specialties and landscape, mostly soft type of adventure trips are possible in Estonia.

Table 1. Types of nature tourism in a broader meaning **(**Defining 'Nature Tourism': meaning, value and boundaries 2013: 4)

NATURE TOURISM	
Soft adventure:	**Eco-tourism:**
- Moderate level of physical involvement - Less physically challenging	- Committed niche - Learning/caring
Hard adventure:	**Special interest and Wildlife Tourism:**
- Physical, challenging, risky	- Bird watching etc. - Terrestrial/marine

Ecotourism

The International Ecotourism Association (What is ecotourism? 2015) defines ecotourism as follows: "Responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education." Ecotourism is non-consumptive, holds eco-centric values and ethics in relation to nature and creates an ecological conscience. It unites communities, sustainable travel and conservation. However, eco-tourist also takes part of adventure tourism, culture or special interest tourism, meaning eco-tourists are not one homogeneous group with having same motivations and preferring same activities.

Special interest and wildlife tourism

Traveling to observe wildlife in natural environments and preferably in their native habitat is part of wildlife tourism. It is about gaining some further understanding of a wide variety of species while encountering fauna and flora. Most of special interest visitors are targeted by specialist tourism companies employing highly knowledgeable nature tourist guides. Visitors are highly demandable and well educated. For example, bird-watching, seal-watching (both activities practiced in Estonia) are considered special interest wildlife tourism (Defining 'Nature Tourism': meaning, value and boundaries 2013: 3).

2. TRENDS IN TOURISM

2.1. Europe and Estonia

In year 1950 there were 278 million tourist arrivals while in 2015 the number has increased to almost 1.2 billion showing the rapid growth of tourism industry (UNWTO: Tourism Highlights 2016:2). In 2015, there were 608 million, 51% of world's total international tourist arrivals in Europe. The number grew by 5% compared to year 2014 (*Ibid.*: 7). Europe will remain one of the highest visited region. In 2015 tourism was influenced by three major factors: 1) the decline in the price of oil, 2) the strong unexpected exchange rate fluctuation and 3) increasingly big concern about security and safety (*Ibid.*: 3).

Approximately 3 million tourists with accommodation and another 3 million one day tourists visit Estonia annually (Tourism – Estonian Ministry of Economic…). While international tourist arrivals have slowly increased in Estonia every year, then in 2015 there was a decrease by approx. 150 000 visitors (*Ibid.*: 8). The decrease can be accounted for Russian ruble weak level which resulted in critically low visits from Russia (Vene turistide arv…: 2015). According to Raun *et al.* (2016: 206) most of the visits (48.3%) in Estonia are made only to one county and 35.8% are made to two counties. Harju county is the highest visited with 40.7%, which shows that Tallinn is playing a gateway role for Estonian tourism. Other most visited areas are around the bigger cities like Pärnu, Narva and Tartu (*Ibid.*: 206).

2.2. Nature tourism

In USA 20% of international visitors also seek out to nature and about half of 21 million outbound tourists from USA in 2010 engaged in activities in nature (The Case of Responsible Travel 2013: 2). In 2013, 42% of travels were adventure trips making the sector worth 250 billion EUR (Global Report on Adventure Tourism 2015: 20). In 2014, 31% of visitors in

Estonia chose activities in nature (Tõnurist & Sõstra 2015: 8). Approximately 25-30% of international visitors spend time in Estonian nature (Ehrlich 2013: 27 ref. Statistics Estonia).

Adventure travellers are generally more willing to try new destinations, activities and travel products (Global Report on Adventure Tourism 2015: 23). Backpacking, trekking, hiking as well as cycling are activities on the rise (*Ibid.*: 24). Eastern Europe and Scandinavia are in the top 5 regions of adventure customer's interests (Adventure Travel Industry Forecast 2015: 8). Estonia has been a high-ranking country for last 7 years (Adventure Tourism Development Index: Report 2015: 8). In ranking the countries there were 1) safety and welcoming, 2) adventure resources and 3) readiness (infrastructure, cultural resources, destination image) considered.

The awareness and concern about the environment is shooting up. More and more tourists show interest in tourism services which respect the local culture and protect the environment. 71% of TripAdvisor members said they will make more eco-friendly choices in upcoming years (TripAdvisor Survey Reveals… 2012). More than two thirds of consumers around the world prefer to buy services and products from companies that give something back to society, support environmental organisations and events (2nd Annual Green Traveler Study 2012: 22). Eco-friendly consumers travel more than regular ones, which means the use of eco-friendly services are on the rise (The Case for Responsible Travel… 2013: 2).

According to the Travel & Tourism Competitiveness Report, Estonia is ranked 38th out of 141 countries meaning the set of factors and policies enable the sustainable development of Estonian travel and tourism sector. There were several indicators measured (i.e. environment, policies, infrastructure etc.). While the Natural Resources indicator received only 2.7 points out of 7 then the Quality of the Natural Environment got a high 5.8 points raking Estonia on 19th place. (The Travel & Tourism Competitiveness Report 2015: 143). Therefore, can be suggested that Estonian is a valuable nature tourism destination and is competitive with other countries.

There is a rapid growth encountered in consumer demand for responsible travel, nature/adventure tourism with and estimated annual growth rate of 10-30% (Kuenzi & McNeely 2008: 2). Estonia has a lot of potential to be one of the well-known nature tourism destinations if the information about the possibilities will reach the right target market.

2.3. Estonia as a travel destination

The main body for marketing Estonia as a valuable tourism destinations in international markets is Estonian Tourist Board operated by Enterprise Estonia (hereafter: EAS). The aim of EAS is to increase the popularity of Estonia as well as enhancing international competitiveness of Estonian tourism products (Estonian Tourist Board). Reputation of Estonia as a travel destination is low (Eesti Riiklik Turismiarengukava 2013: 7). Hence, while developing new tourism services and products there is a need to put more consideration on the wants and needs of different consumer target groups. To stand out of other travel destinations, there is a need to find innovative ways for developing tourism services and products, for offering added value and high quality customer service.

For EAS, priority target markets are our neighbouring countries Finland, Latvia and Russia, since they are with the highest potential to deliver revenues from marketing investments. While there is somewhat importance of marketing nature tourism opportunities to these countries, Germany and United Kingdom are the markets with highest interest in Estonian nature (Eesti Riiklik Turismiarengukava 2013: 13). Germany, United Kingdom, Sweden and Norway are the secondary priority markets for EAS. Regardless of the target market, the main marketing channels are the tourism information system Visitestonia.com and social media (Estonian Tourist Board).

In neighbouring countries promoting Estonia is focused on B2C marketing, meaning it is done through 1) campaigns, 2) showcases, 3) press trips, 4) travel fairs and 5) public relations. B2B marketing like 1) information days, 2) showcases, 3) familiarization trips and 4) travel trade fairs are used for the distant and secondary priority markets. Marketing is planned and conducted in collaboration with tourism organisations and companies (Estonian Tourist Board).

Since Estonian tourism is strongly seasonal, EAS has made increasing the number of off-season visits one of the main goals. Fostering first visits from distant markets (such as USA, Japan, China) and prolonging the duration of visits are as well of high importance. EAS aim is also making Estonia a well-known innovative leader in conference tourism (Eesti Riiklik Turismiarengukava 2013: 7). That helps to lower the impacts of seasonality in tourism. Higher revenue is collected from conference tourists that it is from regular holiday tourists (Karu 2015: 3). Their leisure time can be filled in with hikes to nature, culture trips, shopping etc. meaning other sectors are benefitting from conference tourism as well.

However, there are several factors that influence Estonian NTCs in offering high-quality service. According to Põlluste (2016: 57) Estonian NTCs lack financial resources for developing services. As the main weaknesses of NTCs lack of time and resources, lack of qualified personnel and partners for cooperation were mentioned. Flexibility and personality, as well as unique and untouched nature were mentioned as the strengths of Estonian nature tourism sector. (*Ibid.*: 57)

In January 2017, EAS introduced a new brand of Estonia. "Our brand is Estonia" (Brand Estonia core messages), without any logo, meaning the brand is developed through stories, images and actions. When introducing Estonia, the three core messages are 1) independent minds, 2) clean environment and 3) digital society (*Ibid.*). Among other strengths the core messages emphasize 1) easy communication with the state, 2) the high certification of being organic, 3) clean water, 4) digital document signing and 5) quick, carefree tax filing. Brand.estonia.ee gives several visual and verbal guidelines what to follow while introducing Estonia. Estonian brand is created by following these recommendations and focusing on core elements.

Marketing Estonia as tourism cluster will make the NTCs also more noticeable. NTCs can offer a high quality service and market themselves to international customers effectively if they understand trends in nature tourism, consumer behaviour and influences, benefits of clustering and put principals of marketing to use.

3. SERVICE QUALITY IN NATURE TOURISM

Quality services are considered crucial for a company's competitive advantage. Economically sustainable company can offer services what clients want. Knowledge and understanding of influences of service quality and satisfaction of customers are essential to offer a quality service and enhance the tourism sector business. Providing quality service is likely increasing return visits and ensuring customer satisfaction (Said *et al.* 2013: 62). Therefore, determining service quality is needed to decide on appropriate strategies of operations.

Service quality is an assessment whether the service delivered meets the needs and wants of a customer. While evaluating the service quality there are company's performance and customer's general expectations compared. Based on the comparison, next company's performance steps are identified to offer a high-quality service.

"Perceived quality" refers to the extent of the gap between the perceptions and expectations of consumers. However, perceived quality is not equivalent to objective quality meaning it cannot be measured by technical superiority, for example. It is an abstract judgement of a service formed by physical characteristics, price, brand name etc. (Zeithaml 1987).

Therefore, to offer a total high-quality service, in addition to objective quality, "perceived quality" must be taken into consideration as well. Total quality management (hereafter: TQM) is defined as "the integration of all functions and processes within an organisation in order to achieve continuous improvement of the quality of goods and services" (Omachonu & Ross 2005: 3). Processes and components of TQM are illustrated in figure 1. Quality planning involves identifying the service users, their needs and expectations. Based on that, effective design is developed and implementation of service is performed. TQM requires continuous quality monitoring and evaluation to identify areas of improvement.

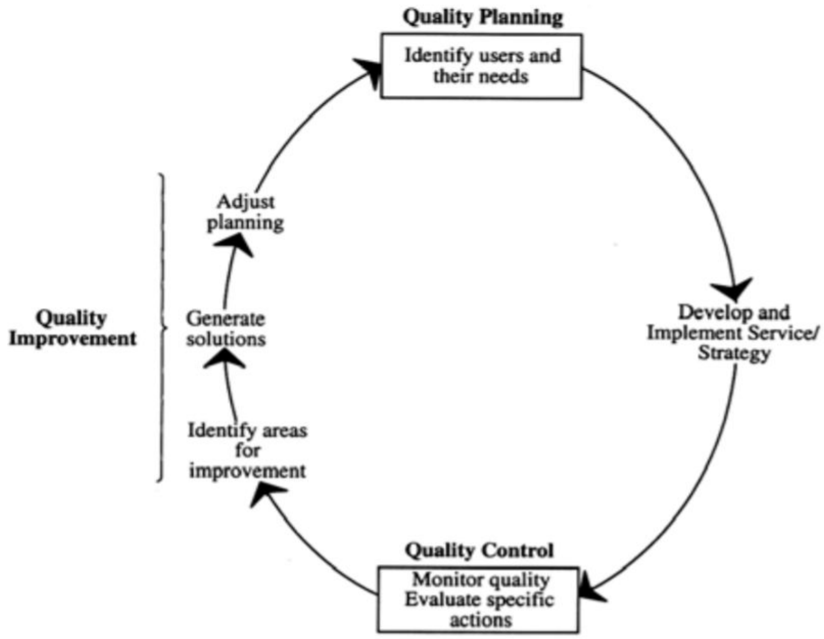

Figure 1. Processes and components of Total Quality Management (Moscardo & Saltzer 2004: 169).

The difference between expectation and performance along the quality dimensions determines the service quality. There are three quality service dimensions distinguished (Kang & James 2004: 269).

1) Technical dimension – what service is provided and what is the perceived outcome;
2) Functional dimension – how is the service provided and how the process functionality is perceived by a customer. To measure the functional dimension there is the SERVQUAL model developed. More of that on table 2;
3) Image dimension – well-known image of a company has an impact on customer perception. If the service provider has a positive image, minor mistakes will be forgiven while continuous mistakes damage the image. Image dimension is based and developed on the first 2 dimensions.

There is a strong correlation between customer satisfaction and quality service. The SERVQUAL model is used to measure service quality, customer satisfaction and to underpin the next steps to attract new and get repeat visitors. It is believed that overall customer satisfaction is based on 5 dimensions of SERVQUAL (Said *et al.* 2013: 64).

Table 2. Descriptions of SERVQUAL dimensions (adapted from Said *et al.* 2013).

SERVQUAL dimensions	Description
Assurance	Knowledge and courtesy of the employees and their ability to convey trust and confidence, and provide necessary information (safety, knowledge to answer questions etc.)
Reliability	Ability to perform the promised service dependably and accurately.
Responsiveness	Willingness to help customers and provide prompt service.
Empathy	Caring, individualized attention the company provides its customers.
Tangibles	Physical facilities, equipment, and appearance of the personnel that reflects local influence (materials visually appealing and reflect local influence etc.)

Quality of service is difficult to measure since quality is perceived differently along the variety of customers. However, companies with higher level of quality receive higher market shares and returns. It has been found that improved quality can lead to lower costs and higher profit margins (Khan 2003: 110).

To deliver a high-quality service the NTCs need to understand their customers. In the next chapter, there is given an overview of characteristics of nature tourists. To reach potential clients it is also necessary to have knowledge of customer’s decision making influences.

4. CUSTOMERS OF NATURE TOURISM COMPANIES

4.1. Characteristics of a nature tourist

To understand the reason behind the growing numbers in nature tourism sector, there is a need to comprehend the mindset of nowadays people and characteristics of different types of tourists. Due to globalisation, there is an increase of modern conveniences and amenities which has led present-day people to a near complete disconnection from nature. More than half of the world population lives in the cities (World Urbanization Prospects 2014: 2). It has resulted in the urge to feel part of and reconnect with nature.

An eco-tourist is characterised as well-educated, with higher than average income and tend to be middle aged women (Alaeddinoglu *et al.* 2013: 94). An eco-tourist usually originates from more developed countries from North America or Western Europe (The Encyclopedia of Ecotourism 2001: 2). Experienced eco-tourist, who travels more frequently, is more interested in all season travelling, specially shoulder seasons (*Ibid.*: 44).

However, wildlife tourists tend to be older, independent travellers with a higher income compared to a casual interest nature tourist. They tend to stay longer and spend more in the travel destination (Moscardo & Saltzer 2004: 177). In the wildlife tourists segment, there can be found “specialists” and “generalists” with casual or serious interest in wildlife (Curtin 2008: 3). To distinguish a special interest wildlife tourist from a general interest and casual tourist there must be:

1) continuity in the activity;
2) experience in development;
3) evidence of knowledge, training and development skills;
4) sense of accomplishment, enhancing social image and facilitating social interaction;
5) a unique social world and idio-culture;
6) a tendency to identify with the chosen pursuit, social identification (*Ibid.* 2007: 13).

Beckmann and Duverger (2014: 11) differentiate three types of adventure tourists: 1) grazers, 2) adventurers and 3) enthusiasts. Grazers are first-time participants of adventure travel, adventurers are thrill-seeking, intermediate adventure participants while enthusiasts are advanced and skilled in their favourite activity. More of that shown on table 3.

Table 3. Characteristics of adventure traveller types (adapted from Beckmann & Duverger 2014).

	Demographics	**Risk**	**Personal value**
Grazer	A young professional. Equally male or female. Living in major city area. Aged 18-40. Medium income.	Takes some risk when on vacation. Seeks max thrill.	Wants to accomplish something.
Adventurer	Probably middle-aged. Female (53%). Has children. 51% unmarried. Higher education. Lives in major city area. Medium income.	Enjoys risk and thrill but manages these by acquiring proficiency in the activity undertaken.	Values family and security first. Wants to accomplish something
Enthusiast	More likely a male (54%). Higher education. High earner.	An expert in the activity undertaken. Always strives for new challenge but with measured risk. Likes to push his physical limits (48%). Seeks thrill.	Early adopter and an opinion leader. Values accomplishment. Has a level on expertise and risk control achieved over the years.

However, the statistics of nature tourists' demographics need to be taken with critical view since it is stressed that nature tourists are not a homogeneous group. Nature tourism, especially eco-tourism is rather based on values and overall mindset.

The experiences of tourists can be divided into four categories: 1) a form of entertainment, 2) a form of social affiliation, 3) a search for self and 4) a state of being (Vespestad & Lindberg 2010). However, Arnegger *et al.* (2010) use travel service arrangements (standardised, customised, independent) and travel motivation (sports and adventure, nature experience and nature protection, hedonism) to characterise nature tourists.

4.2. Influences of decision making

Tourist satisfaction and its influences are widely researched topic. Tourist satisfaction is strongly related to the meeting of expectations, which are built on destination image. Vajčnerová *et al.* (2013: 2918) bring out 15 factors influencing destination image:

1) natural attractions (conditions of a natural character, flora, fauna);
2) cultural-social attractions;
3) structure and level of accommodation facilities;
4) structure and level of boarding facilities;
5) structure and level of experience activities;
6) transport accessibility and infrastructure (getting to the destination);
7) possibilities of local transportation at a destination;
8) accessibility and quality of information;
9) pre-vacation communication (the promotion and distribution of services, reservations);
10) friendly welcome by local inhabitants;
11) product packages;
12) perceived image of a destination;
13) prices of consumer goods and services in a destination;
14) sense of security;
15) uniqueness of a destination (its differences from competitors).

Marketing and media have an important role to play when it comes to destination image and decision making (Hedlund 2013: 7). Nowadays internet is used as one of the main sources of information. With an upgoing trend, more than three billion people have access to internet around the world (Internet Users). As seen in figure 2, online research was one of the leading ways to prepare for and get information about an upcoming trip while visiting a travel agent or booking through a tour operator were not of that significant importance (more on that in chapter "Marketing channels").

According to TripAdvisor, the largest traveling site in the world, 1) online reviews (44%), 2) location (68%) and 3) price (76%) were named as top three factors in decision making for global travellers (TripAdvisor Global Study Reveals… 2013). However, for an adventure traveller, 1) natural beauty, 2) available activities and 3) destination climate were named as top three factors affecting them in choosing their destination (Adventure Tourism Development Index 2015: 4).

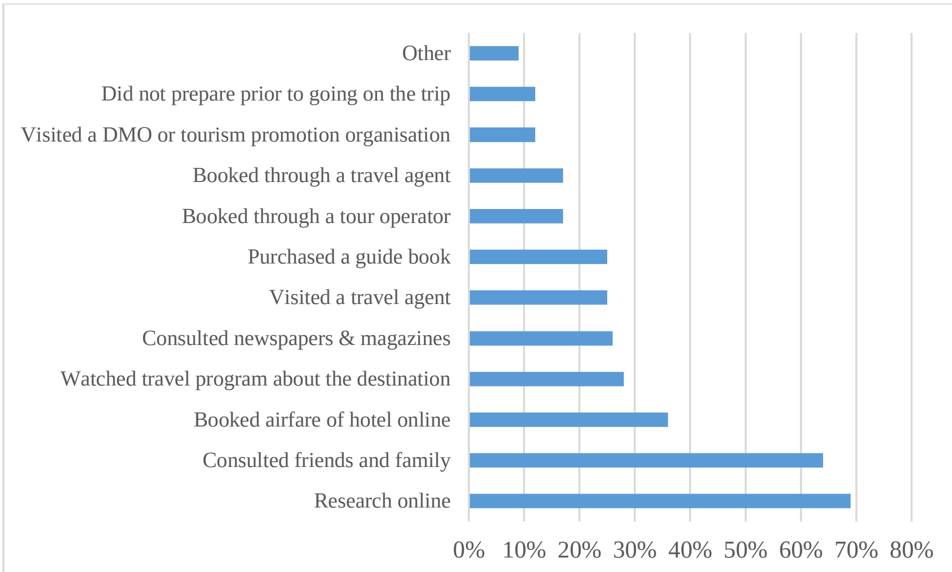

Figure 2. Adventure traveller’s sources for preparing and getting information about a trip (Global Report on Adventure Tourism 2014: 15).

Also, social media, such as Twitter, Facebook, Instagram play a major role in traveling. 42% of travellers reach out to social media for travel planning and 40% use it for travel inspiration (TripAdvisor Survey Reveals… 2012). 43% of travellers use their mobile phones and tablets to search for information while on a vacation (TripAdvisor Global Study Reveals… 2013). According to Põlluste (2016: 57) the main mediums of marketing of Estonian nature tourism companies are their homepage and advertisements on relevant information portals. Therefore, the websites need to be mobile-friendly, fast, optimized and easy to navigate on small screens. A webpage of a service company is the first tangible proof of its existence to a potential customer. Quality website improves the image of an organisation.

It is also necessary for the webpage to be found on the first page of Google organic searches. Organic search means that the traffic to a webpage is generated by relevant keywords and/or business name not by advertisement for example. Organic search results collect 90% of the clicks while paid advertisements receive only 10% of the clicks and only 10% of the people continue on the second page of Google search (Sharp 2014). Therefore, it is needed to know Search Engine Optimizing which ranks the webpages on higher Google search results.

Tourism requires an understanding of visitors influences of decision making so that programs can be developed and total high-quality service implemented. When influencing a consumer to choose a destination or service, marketing which appeals to the preferences and motivation of one, is a high importance factor. Therefore, it is necessary to understand the customer behaviour in order to use the right marketing techniques and support financial viability of NTCs. Next chapter brings light to marketing in nature tourism.

5. MARKETING IN NATURE TOURISM

5.1. Concept of marketing

In the simplest way, marketing can be understood as a process of achieving voluntary exchange between two parties. According to Middleton *et al.* (2009: 24) in terms of users/customers, marketing is about understanding:

1) the needs and desires of users;
2) products and services users choose to buy or use (when, how much, at what price, how often);
3) how consumers get information about products and other offers;
4) where do they buy products and services;
5) what level of after sales or in use service is needed;
6) how they feel after the purchase and consumption of products and services.

In terms of producer organisations, marketing is focused on:

1) which products or services to provide and why;
2) how many products and services to supply;
3) at what price;
4) how to communicate their offers and communicate with buyers, by which media;
5) when, where and how to make products and services available and deliver to users;
6) what level of pre/in use/after usage services must be offered.

In marketing, there can be named three core elements. Firstly, depending of the target consumers' interests, needs, wants and ability to pay, the attitudes and decisions towards the value of services are developed. Secondly, in the context of producers' long-term business objects and the environment they operate, their attitudes and decisions towards the services for sales must be considered. Lastly, before, during and after communication of the sale with the consumer is also playing a key role in a marketing system. In other words, the core elements of marketing system are the attitudes and decisions of buyers and sellers in an exchange process. Taking into account the core elements, the marketing system is explained in table 4.

Table 4. Marketing system (Middleton *et al.* 2009: 32).

PROCESS	**DESCRIPTION**
Marketing research and analysis	Continuous, detailed appreciation of past and projected trends in the external business environment (including sustainable issues)
Business strategy and marketing planning	Developing research and analysis into overall business and marketing opportunities and devising strategies and operational plans
Campaign planning and budgeting	Producing costed operational programmes to integrate the four main elements into the marketing mix – the four P's
Action programmes and implementation	Detailed programmes of daily/monthly/weekly activity for all elements in the marketing mix
Evaluation, monitoring and control	Monitoring and evaluating the results of marketing including all forms of market research and use of databases. Taking corrective action as appropriate

Marketing is about increasing customer awareness and delivering a message (Middleton *et al.* 2009: 27). For example, advertising, creating brochures and collateral material, public relations are marketing activities. In tourism, consumer has always several services to choose from. Hence, the providers should have high motivation to have a clear understanding of one's customer and how to influence the customer to choose their services instead of the competitors'. Therefore, it is necessary to have a good sense of marketing system, which includes the marketing mix.

5.2. The marketing mix

Marketing mix is a conceptual framework for principal marketing decisions to manage consumer demand. The marketing mix is a tool that can be used for making long-term strategic business plans or short-term tactical programs. The traditional marketing experts distinguish marketing mix of 4 Ps (Stange & Brown 2012: 96). The 4 Ps of marketing are 1) product, 2) price, 3) promotion and 4) place. However, in the concept of service marketing Booms and Bitner (Vliet 2013 ref. Booms and Bitner 1981) extended the traditional marketing mix with 3 additional Ps: 1) people, 2) process and 3) physical. Since tourism is considered to be a service business then these 7 Ps also apply to tourism marketing. Implementing the 7 Ps of tourism marketing helps to develop an effective marketing program that attracts the desired target group and increases the business. 7 Ps are explained as follows.

Product

A clearly identified tourism product/service that includes specific characteristics and provides value to a customer. It involves introducing new services or improving the existing ones. In case of nature tourism there is a need to consider 1) services offered (unique recreational activity), 2) timing (vacation times, high/low season), 3) packaging (accommodation, food service, transport), 4) image being delivered through marketing (reflecting a certain type of activity, i.e. adventure tourism) and 5) customer service (Bustam & Stein 2013: 2).

Price

Pricing must be competitive, must meet the tourist's demand as well as business' profit margins. Price is the most important factor that is influences by 1) service quality, 2) competition, 3) distribution of services and consumers, 4) cost, 5) seasonality and 6) profit margin (Bustam & Stein 2013: 3).

Promotion

It includes the ways how business communicates the offers to the consumer. It is used to attract attention, create interest and demand which will lead to selling the service. Promotion is creating a brand, advertising channels, public relations and social media (Bustam & Stein 2013: 3).

Place

It is a location where the service is available to the customer as well as getting information about the tourism operation and buying the service (Bustam & Stein 2013: 4; Lin 2011: 10635).

People

In "people" are involved everybody who are (in)directly included in the trade of the service (customer contact employees i.e. tour guides, personnel, management and customers themselves). The reputation of the company and the brand is in the hands of the people. Attitude and behaviour of an employee creates a customer's perception of experienced service. The perception can be positive or negative which can influence customer satisfaction and one's (repeated) purchase intentions (Vliet 2013).

Process

It is a sequence of steps to get to a certain point. In tourism, it represents the chain of activities, procedures, protocols and more by which the service is eventually delivered to the customer. The delivery system and the flexibility of the employees are two key factors in a successful delivery of a service. It is essential to have a thorough knowledge if the services are provided in time, if the customers are informed about the services etc. Customer feedback to the service is a good way to evaluate if the process meets the needs of a customer (Vliet 2013).

Physical (evidence)

It refers to the experiences had in the environment of the delivery process. Physical evidence comes to five senses of 1) sight, 2) sound, 3) scent, 4) touch and 5) taste. Unlike products, the services (in nature tourism) are intangible, therefore the customer seeks for tangible clues to help them understand the service company. A company's web page, for example, is a physical evidence of a service company. Also, a written recommendation by a satisfied customer communicated to a potential customer supplies a physical evidence of a service and may increase the sales (Vliet 2013).

The 7Ps must be carefully considered since they include factors that influence the demand for nature tourism services and destinations. For reaching to a potential customer there are several marketing channels which are introduced in the next chapter.

5.3. Marketing channels

Marketing channel, also known as distribution channel produces the link between the supplier of travel services and the consumer. It is a system that makes the service available to the consumer. Distribution may be direct or indirect. Direct occurs when the producer sells directly to the consumer while indirect goes through an intermediary, such as tour operator or tour agent.

Adventure products are usually marketed by intermediaries, although the trend has been towards disintermediation (Global Report on Adventure Tourism 2014: 21). The tour operator or travel agent, the middle man, who has traditionally connected the consumer to the provider is being removed. The consumer can access information and travellers' reviews online, meaning one is more likely to go straight to the provider. Other named reasons not to use intermediary were flexibility and better deals (Beckmann & Duverger 2014: 21). While disintermediation is more relevant in mature adventure markets, in next years it will likely also cause a change in adventure tourism emerging economies (like Estonia, for example) (*Ibid.*: 22).

There are several channels that can be used by NTCs to advertise and promote their services. Here are some examples as follows (Etree 2013):

1) traditional media like print advertisements, commercials, news releases;
2) digital media like search engine optimization, interactive online adverts, opt-in e-mails;
3) social media like blogging, vlogging, tweeting, posting, sharing, networking, pinning, bookmarking, media sharing and commenting on social media websites;
4) promotional items like brochures, business cards, press kits, websites, informational videos and merchandise, trade shows.

With a trend of disappearing intermediaries, it is a crucial factor for nature tourism companies to be active and available online. Most of Estonian nature tourism companies are small scale. By reaching out to potential clients through internet marketing makes micro-businesses visible and easier to be found. For a small size company, cluster marketing and branding can give an even better chance to be seen on international markets. Next chapter gives an overview of cluster branding and marketing.

5.4. Benefits of a tourism cluster

Cluster is a geographic concentration of connected companies, service providers, specialised suppliers and relevant institutions in a certain field (Andersson & Ekman 2012: 11). The concept of clustering is becoming more and more popular in tourism. Tourism cluster increases destination's competitivity with its ambition to reinforce the destinations identity by making it unique compared to other destinations (*Ibid.*:13). Tourism clusters can consist of 1) tourism promotion authorities, 2) government agencies, 3) private sector associations and individual companies, 4) tourism and hospitality training bodies and 5) NGOs.

Clusters can mobilize a lot more resources than its member alone. For small or medium sized enterprise (hereafter: SME), functional clusters provide 1) resources, 2) knowledge, 3) technologies and 4) markets. For SMEs the most important benefits of belonging to a cluster are internationalisation and higher perceived quality (*Ibid.*: 25) (more of perceived quality in chapter "Service quality in nature tourism"). Also, operating in collaboration evokes a healthy competition among companies which raises the service quality as well as management skills.

As SMEs have limited resources for extensive international marketing, cluster is especially attractive to them as it lowers the marketing costs. They can benefit from joint marketing mechanisms like trade fairs, trade magazines and marketing delegations. Other than reducing the costs, SMEs in partnerships are more visible in large international markets. To differentiate from thousands of clusters strategic focus on developing a branding and marketing strategy is needed. Marketing and branding are the main factors for long-term growth and competitiveness of a (tourism) cluster (*Ibid.*: 27).

6. MATERIALS AND METHODOLOGY

To fulfil the goal of this thesis empirical data is collected by using the following research methods:

1) semi-structured interviews with the representatives of Estonian nature tourism companies;
2) semi-structured interviews with the representatives of NGO Estonian Rural Tourism and EAS;
3) measuring the quality of Estonian nature tourism companies' webpages;
4) analysing the data collected from Visitestonia.com webpage;
5) GAP analysis.

Semi-structured interviews with the representatives of Estonian nature tourism companies

This thesis is focusing on Estonian companies whose main activity is offering experiences in nature. This includes 1) adventure tourism (kayaking, canoeing, hiking, bog-shoeing etc.), 2) special interest tourism (nature photography, observations etc.) as well as 3) activities of eco-tourists. Companies who are perceived as nature tourism companies yet are mainly focusing on accommodation, catering and/or fishing were not in the population of the research. Excluded were also state funded programs, nature schools and clubs as well as companies who sub-contract NTCs.

It is difficult to say how many NTCs there are in Estonia. There has been no research done and no valid data has been collected in this field. According to Pärna (2017, personal communication) number might be around 50 to 60. There are only a few NTCs who offer nature tourism services in question all year round. Others might widen their range of services with equipment rent or different educational school programs for students. Therefore, it is difficult to say when the primary activity of NTC changes into some other type.

Because of the delicacy of the topic (talking about the business plan of a company) of this thesis, that requires thorough understanding and deep analysis as well as personal approach, qualitative research was used. The empirical data was collected by individual semi-structured interviews with 15 representatives of different Estonian NTCs. There were 21 NTCs contacted, however six of them had different reasons why they did not wish to take part of the research. All the contacts of the NTCs were found from Visitestonia.com. According to Guest *et al.* (2006), with the sample of 60, saturation of information collected by in-depth interviews occures within first 12 interviews while basic elements of metathemes are present already within 6 first interviews. Therefore, 15 interviews are enough to make conslusions about the whole Estonian nature tourism sector.

The interviews were carried out between December 2016 and March 2017. According to the preference of the interviewee the interviews were carried out either face to face or through Skype. Dates, times, places of the interviews and the names of interviewees are known to the researcher, however this data is not public due to the wishes of the NTCs under consideration.

Before the interviews there was an overall interview guide composed with several theme blocks. The guide provides a clear set of instructions, reliable and comparable qualitative data. The questions in the interview guide were conducted to answer the research questions of this thesis. The interview questions are seen in appendix 1.

All the interviews were recorded with the agreement of the interviewees. In addition to recording, researcher took notes during the interviews. Afterwards the interviews were transcribed and inductive content analysis was performed. Inductive contect analysis is suitable when no or few previous studies of the topic exist, which is the case of this thesis. Open coding was used on transcribed text and set of categories were identified. Collected data was processed with spreadsheet program Microsoft Excel.

Semi-structured interviews with the representatives of various tourism organisations

The interviews were carried out in December 2016 with two representatives of different tourism organisations:

1) Estonian Tourist Board (department of EAS);
2) NGO Estonian Rural Tourism (Maaturism).

The collected data was analysed and processed the same way as the data from NTC interviews. The interview questions are found in appendix 2.

NTCs' webpage quality analysis

The webpages of NTCs who participated in the interviews were analysed making it a total of 15 sites. There were 16 different factors measured in webpage analyse. Hasan & Abuelrub (2011: 17) have collected indicators of a quality website which are the basis of the webpage analysis conducted for this thesis. All of the indicators are not measured in this thesis, however the most relevant ones are. The main indicators are see on table 5.

Table 5. Main indicators of website quality (Hasan & Abuelrub 2011: 17).

Content quality dimension:	**User-friendliness dimension:**
1) Information up-to-date 2) Prices of services 3) Contact information 4) Description of activities and services 5) Foreign language 6) Additional information	1) Supporting information for finding the location/start of the tour 2) Feedback possibility 3) Online booking system 4) Mobile-phone friendliness 5) Page loading time
Design quality dimension:	**Organisational dimension:**
1) Contrast: background and text colour 2) Text size 3) Ease of navigation	1) Page layout 2) Networking partners and local tourist attractions

Webpage speed quality is analysed with on-site SEO tool Google Page Speed Insight (found here: https://developers.google.com/speed/pagespeed/insights/). If the score is higher than 85 the speed quality is very good. If it is below 50 it is lower than acceptable. Mobile-phone friendliness of the webpage is analysed with Google Mobile-Friendly Test (found: https://search.google.com/search-console/mobile-friendly)

Visit Estonia webpage data analysis

Visitestonia.com is the official tourist information site of Estonia. It is maintained by EAS. It provides information about 1) travel, 2) Estonian history and culture, 3) events, 4) activities, 5) places to eat, 6) health and wellness. Visitestonia.com is available in Estonian and 6 foreign languages (English, German, Russian, Latvian, Swedish and Finnish).

In this thesis, there was Visitestonia.com sub-page “Nature and Wildlife” analysed. This topic provides information about 1) hiking and nature tours, 2) national parks, 3) gardens, 4) zoos, 5) bird-watching and 6) horseback riding. The data for the analysis was collected between 01.01.2016 - 31.12.2016 using Google Analytics. Additional statistical data analyse was conducted with spreadsheet program Microsoft Excel.

GAP analysis

Based on literature overview and the results of this thesis there was a GAP analysis of Estonian nature tourism sector performed. GAP analysis compares current situation with the desired future state. By performing a GAP analysis, it is possible to identify problematic areas and actions what to implement for bridging the gap between the current and future state. There are 12 gaps analysed in the field of marketing, service quality, cooperation and tourism destination (Estonia as a tourism destination). The topic is further analysed in the discussion part of this thesis.

7. RESULTS

7.1. Interviews with Estonian nature tourism companies

Overview

There were 15 NTCs interviewed. There are around 50-60 NTCs in Estonia, meaning 25-30% of the companies are represented in this thesis. Most (8) of the NTCs interviewed are mainly focusing on adventure tourism (hereafter: AT). There are also NTCs focusing on general interest (hereafter: GI) tourist activities such as walks in nature and special interest (hereafter: SI) activities such as 1) bird-watching, 2) bear-watching, 3) photography tours. More in figure 3. However, there are 3 AT companies offering activities suitable for GI tourists and 3 suitable for SI. One of GI companies has elements of AT and three companies have elements of SI.

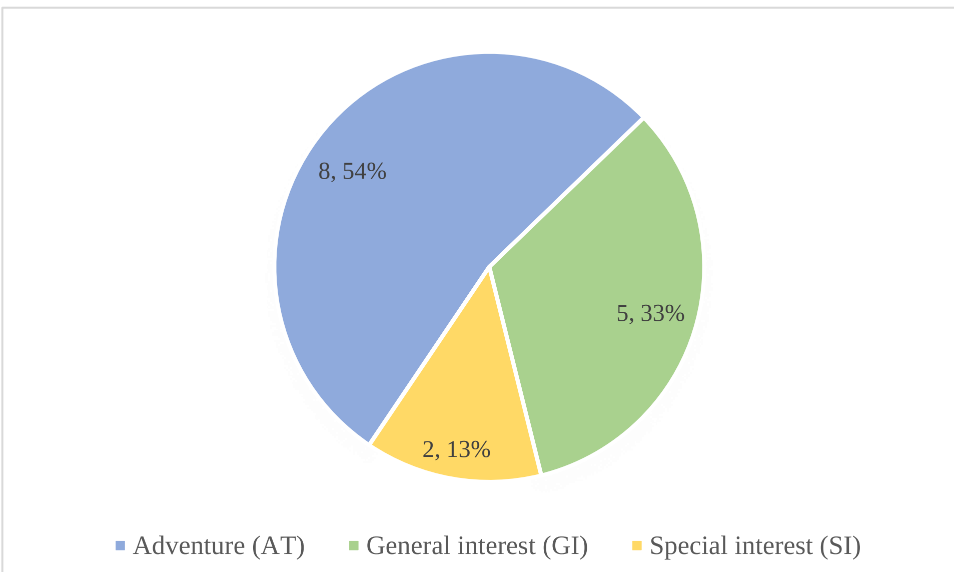

Figure 3. Nature tourism companies' main activities (quantity and percentage).

Most of the companies have been operating for more than 5 years but less than 10 years (figure 4). The overall turnover of the companies in year 2015 can be seen on figure 5. The turnover based on international clients is not specified. Most of the NTCs have a turnover between 10

000 and 50 000 euros. Two NTCs have higher turnover than 100 000 euros and two have lower than 1000 euros.

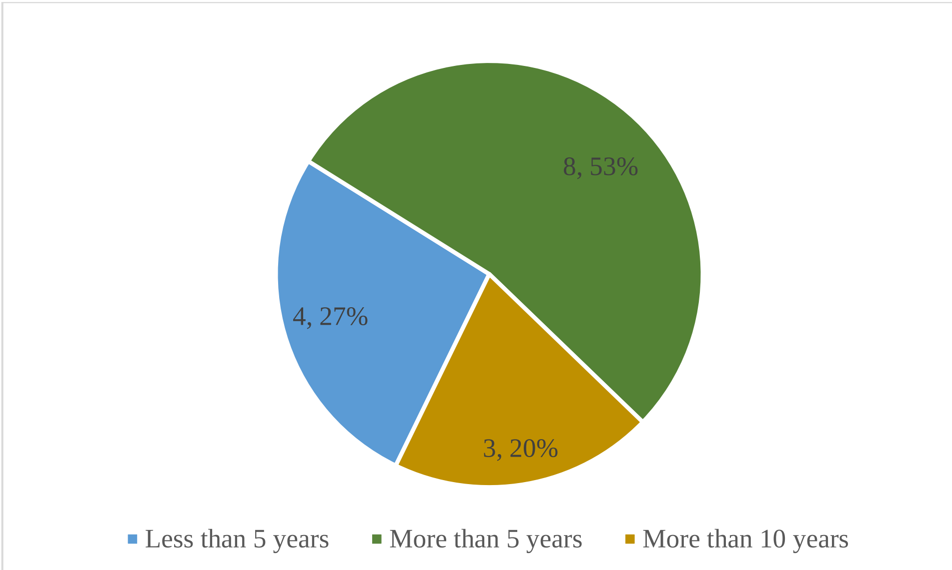

Figure 4. Years of operating of the NTCs (quantity and percentage).

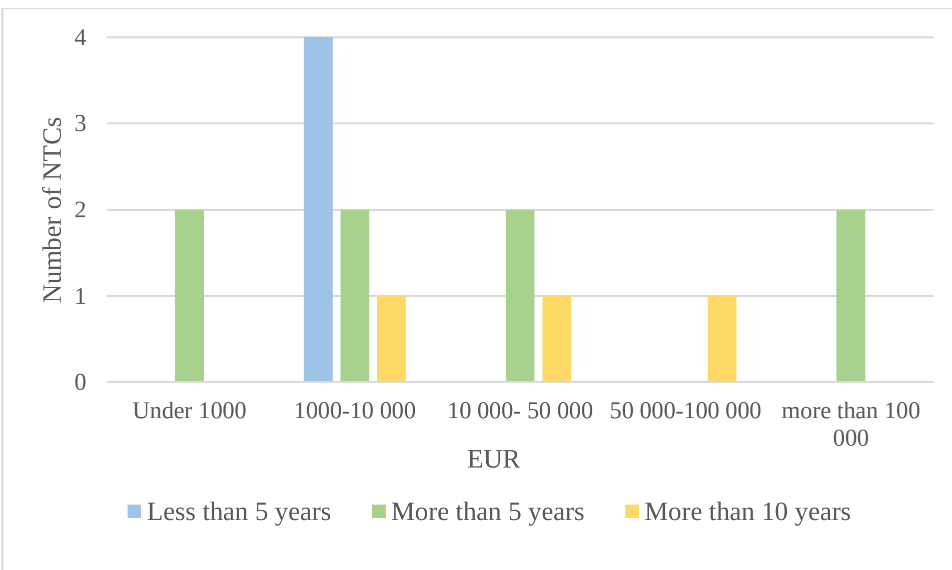

Figure 5. Turnover of NTCs in 2015 based on the years of operating.

Staff and seasonality

During the low season, most of the NTCs have no more than two people at work who are also the company owners and/or CEOs. During the high season, there is a need for additional workforce. Most (47%) of the companies hire 1 to 5 employees while 27% of the NTC do not need any additional workforce (figure 6). All the companies have clients throughout the year, however there are very few clients during low season. For AT companies offering kayak and canoe trips on rivers and lakes the spring high-water time is of high importance. The difficulties of the seasonality are described well by these quotes from the conducted interviews:

"When there's no snow in the winter, nothing is happening. Can't rely on the weather." (AT)

"Now (authors note: in winter) *is a bit calmer season. People are searching for snow and ice which we don't have at the moment."* (AT)

"We don't have tourists in winter. Can't rely on the weather." (GI)

"In two, three months we have to earn an income, which would cover the expenses of the whole year." (GI)

"It's not very motivating perspective, when you have to earn your yearly income in 14 weeks." (SI)

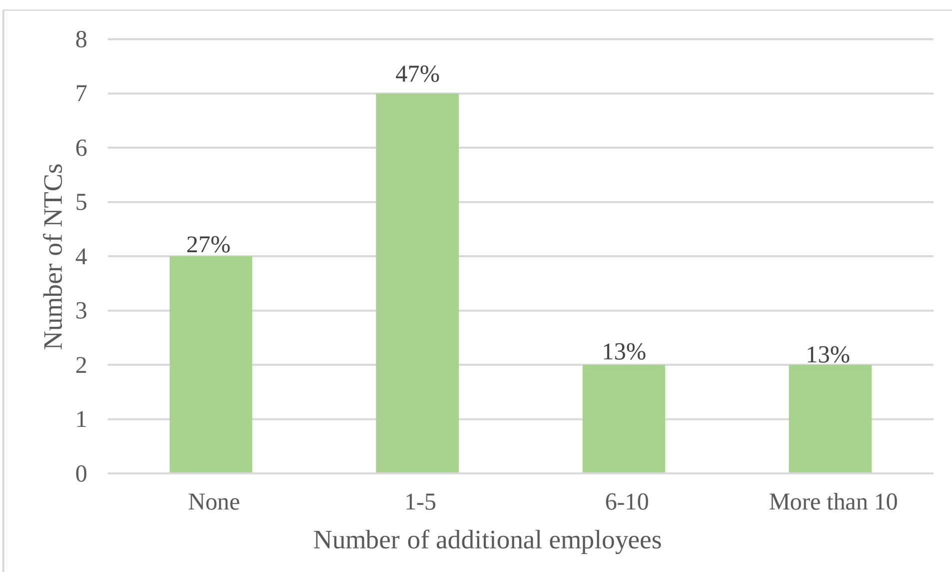

Figure 6. Additional employees hired during high season.

All the companies who need additional workforce find the employees from their own friends, acquaintances and connections while four NTCs also find employees from students and through qualified candidates who have applied for a job. Most of the companies use the "master-apprentice" method to train new employees. The method includes on-the-job training for the new staff member where one is provided with coaching and is immersed in the activity (like specific tour guiding for example).

All the companies offer services in English and Estonian. Other languages are used depending of the knowledge of the guides which might vary every season, since there are new employees hired (almost) every season. While knowledge of English languages is a must for a tour guide then other language skills are beneficial. However, some companies have a need for German speaking tour guides as well. After English, most mentioned languages were German and Russian.

Services

Seven (47%) of the NTCs do not offer any additional services. Since nature tourism in Estonia is seasonal, eight (53%) of the NTCs are offering additional services for higher received revenue. Most popular additional service is equipment rent (30%), while educational student trainings, team-building games for other companies and instructor trainings (such as sea-kayaking instructor) were mentioned as well (figure 7). Few times were mentioned offering accommodation, equipment sales and selling travel packages to other cultural events (on figure 7 named "other").

On figure 8 there can be seen different activities offered by NTCs. The most popular activity is wildlife watching (19%), such as beaver, bear, bird or seal watching. Bog-shoeing and walking/hiking by foot (13%) were the second most popular activities. Water-based AT activities such as kayaking and canoeing are of high importance. There are some offering sailing, rafting, dog-sledge rides, special insect and plant tours as well (named "other" on figure 8).

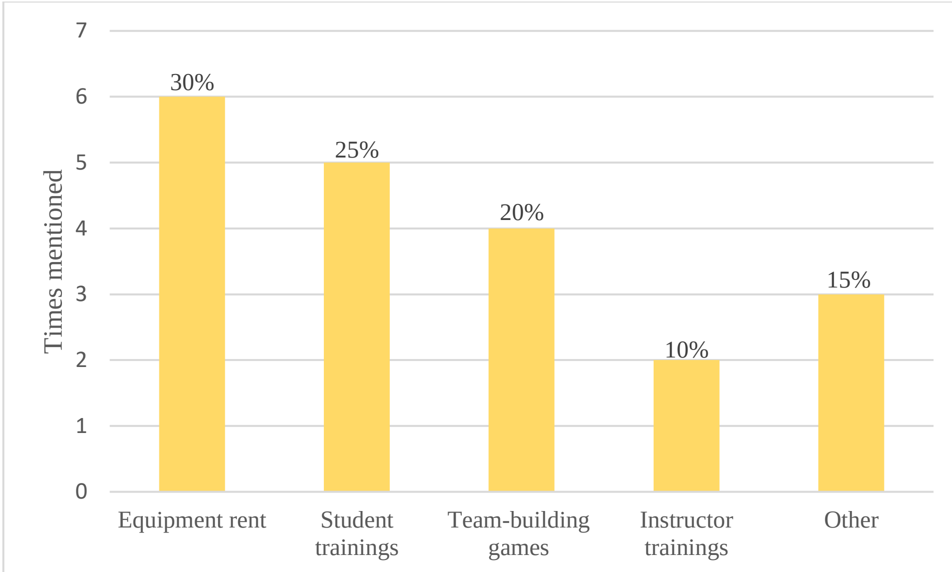

Figure 7. Additional services offered by NTCs.

All the companies who operate near bigger cities have arranged client pick-ups from airport (if required), from their hotels or have a specific meeting point (i.e. in front of Tallinn Tourist Information Centre in Old Town). Companies operating further from the bigger cities send e-mails with directions (GPS-points), public transport information and other suggestions how to reach the beginning point of a tour.

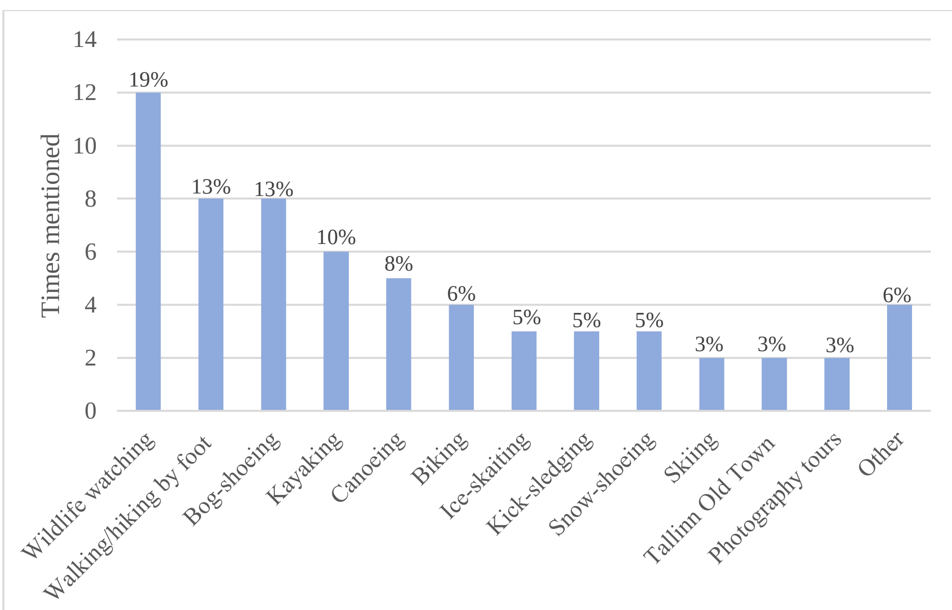

Figure 8. Activities offered by Estonian nature tourism companies.

Clients

AT companies' clients are mostly interested in kayaking, bog-shoeing and canoe trips. Early spring high-water season was considered a busy season. The majority of these activities are offered in different Estonian national parks. Lahemaa and Soomaa were mainly mentioned. GI companies' clients most popular activities are nature and culture tours by walking in Lahemaa. SI companies' clients are most interested in bird-watching tours, for example one-day bird tour in Tallinn or week-long tours in Matsalu national park and Saaremaa.

According to the NTCs there is no typical demographic based international clientele:

"One day canoe trip and going to a bog, it's a clientele with very wide profile. We have several types of people coming, demographics is not important. Our segment is based on interest and values, not demographics." (AT)

"They have big interest in nature and a strong background of hiking. We don't really have these city people, who don't go to nature very often." (AT)

"We don't have that kind of animal like typical international tourist. They are so different that it's impossible to generalize." (AT)

"They are little bit interested in nature, don't have a deep interest in nature. They just want to broaden their minds and hike a little bit." (GI)

"They want deeper values, people, who have found themselves. They appreciate quality and value." (GI)

"Everything is different – age, background, man, woman. We can offer to everyone." (GI)

However, according to findings of this thesis, there are a few demographic factors. AT and GI tourists are usually no younger than 25 and no older than 55. They have at least some higher education and at least average income. AT and GI clients' purpose of visiting Estonia is usually general interest in the country and the nature. They wish to experience the culture and spend some good time in nature. SI companies distinguished their clients. They are mostly men, with higher than average income, usually older than 50 years. They are more willing to get out of their comfort zone and take more risk than GI tourists. They are highly educated and they are specialists on their chosen field. Their purpose of visiting Estonia is nature. Characteristics of the international visitors can be seen on table 6.

Table 6. Characteristics of international nature tourists.

AT and GI international visitors	SI international visitors
Age: 25-55 **Gender**: men and women **Education:** at least some higher education **Income:** at least average **Risk:** willing to take some risk **Purpose of visiting Estonia**: general interest in the country and the culture	**Age:** 50 and more **Gender:** mostly men **Education:** highly educated specialists **Income:** higher than average **Risk:** willing to take big risks **Purpose of visiting Estonia:** nature

Most of the AT companies have more than 1000 clients per year (2016) while majority of GI companies have 100 or less clients per year (figure 9). Majority of NTCs have no more than 10% of international clients, others are Estonian clients. All the SI companies have more than 80% of international clients (figure 10).

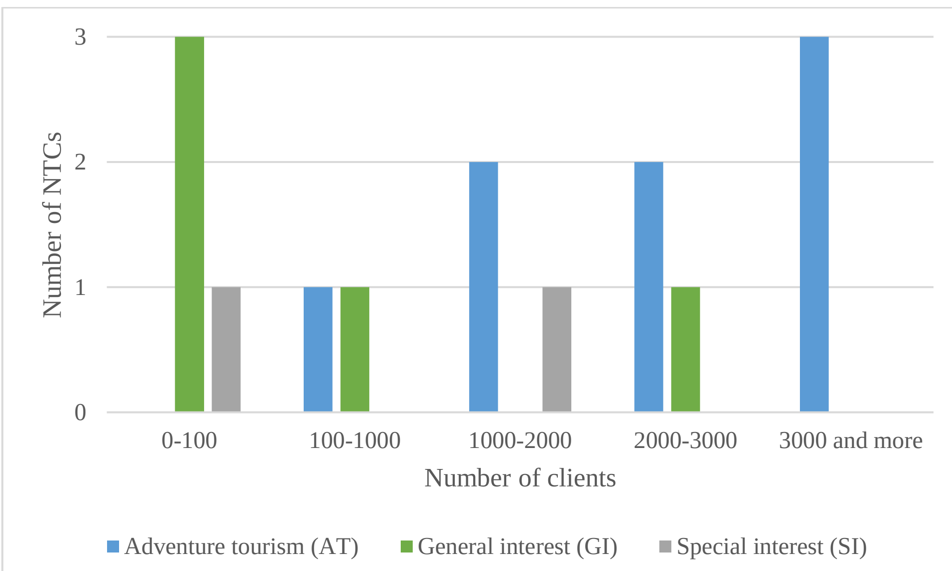

Figure 9. Number of overall clients of NTCs in year 2016.

Seven of the NTCs said that the number of international clients has slowly increased every year, while four companies encountered remarkable increase. For four NTCs the number of international clients has been stable year after year. Stable or little increase of international clients is typical for NTCs who have been active for more than 5 years while newer companies noticed remarkable growth in the proportion of international clients. Most of the NTCs wish to have more international clients by finding more partners to cooperate (i.e. tour operators), visiting foreign fairs or marketing actively online. Some NTCs had other point of views and concerns about rapid growth:

"Necessarily we don't want (author's note: more international clients). *We are a lifestyle company and we are not doing this for money. We just want to discover new places ourselves and show them to others."* (AT)

"Last summer was really intense. Then we were concerned if we really are able to tend everyone." (AT)

"Yes, we want more of them (author's note: international clients*), I think. Actually, I'm not sure. Last summer was exactly on the line. We were not sure if we can tend them all or not. They should disperse a bit over the season. In June, August and September I'd like to have more of them but July is already fully booked."* (AT)

"When EAS suddenly starts to work properly and I have 500 tourists in a queue, I cannot take them. I could probably find other resources but finding a professional nature tour guide is nearly impossible." (SI)

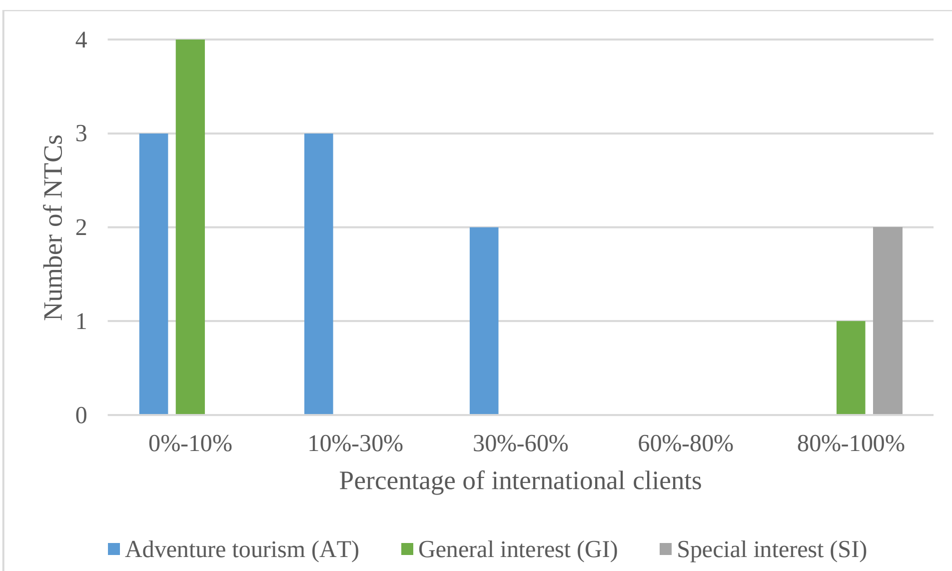

Figure 10. Percentage of international clients of NTCs in year 2016.

In figure 11 there can be seen the countries from where most of the international clients of NTCs come. With 22%, Germans are the most mentioned nationality who use the services of NTCs. While most of the countries are European then the USA is as well of high importance (11%).

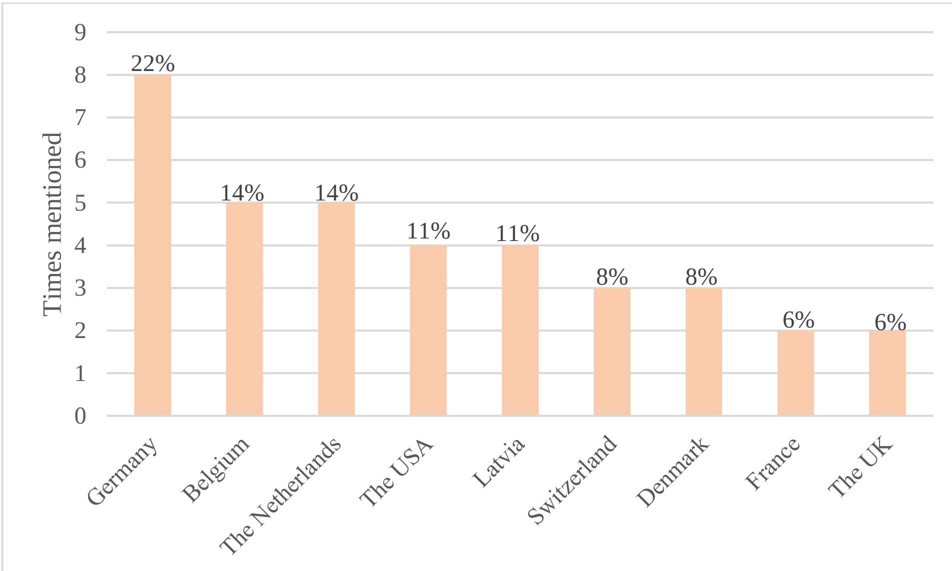

Figure 11. Countries mentioned by NTCs where most of their clients come from.

Five of NTCs are targeting their marketing activities on both, groups (i.e. organised tours by tour operators) and individual (families, backpackers, cruise tourists) international clients, depending of the nature of the offered tour. The majority of the NTCs are focusing only on individual international clients.

Figures 12 and 13 give an overview of what NTCs believe the clients expectations are towards the service and Estonian nature. High quality customer service, flexibility, safety and professional staff are believed to be priority expectations in the service. Genuine nature and culture as well as visiting bogs and seeing animals are expected of Estonian nature. Generally spending good time in nature is highly valued:

"Most of the American have no expectations at all. They are just tired of walking around the Old Town." (AT)

"I offer them the understanding of what it's like to be an Estonian for one day. Usually they are not really interested in how peat forms." (GI)

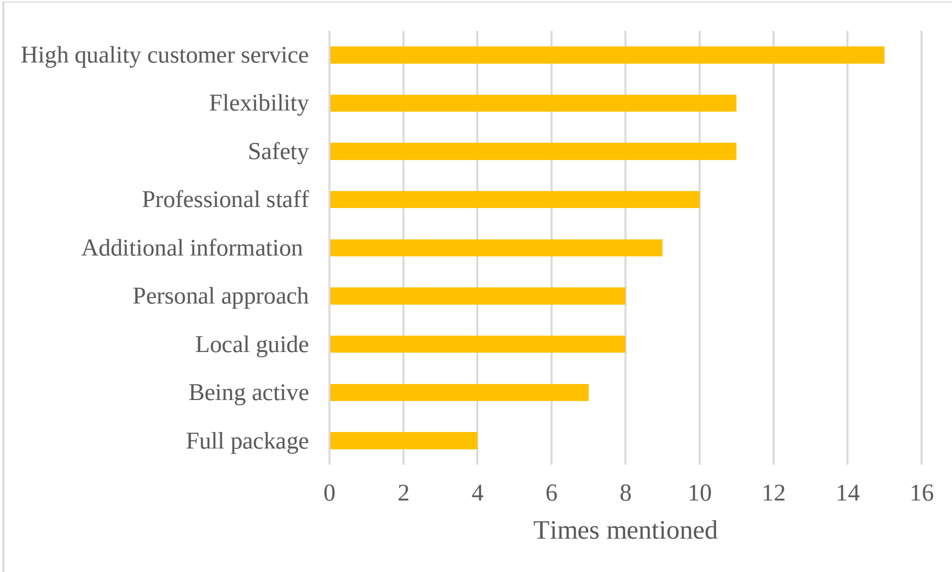

Figure 12. Expectations of international clients towards the service.

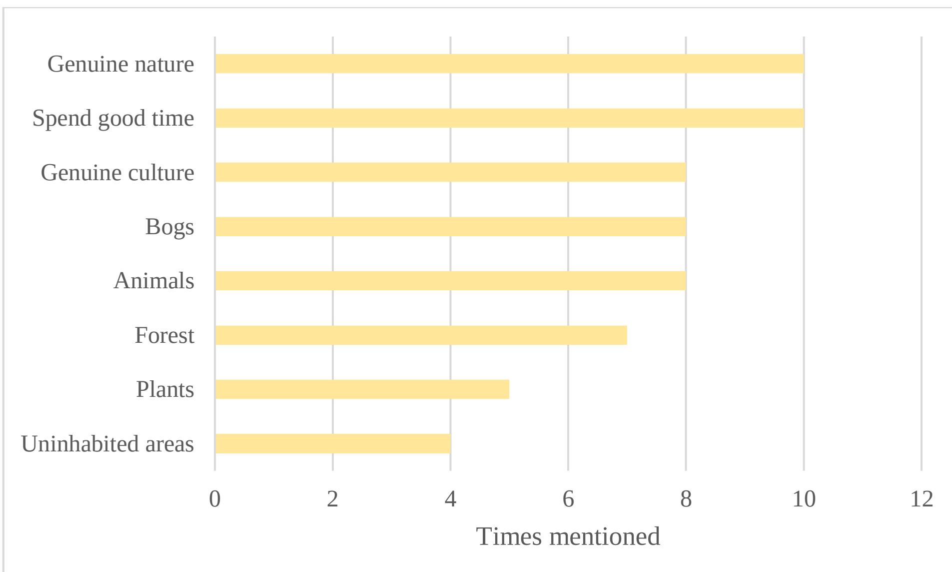

Figure 13. Expectations of international clients towards Estonian nature.

Marketing

All the NTCs have their own webpage, Facebook page and information about their trips on VisitEstonia website. 47% of the NTCs also use Instagram and other external webpages such as VisitTallinn, VisitPärnu for marketing their services online. Few have also TripAdvisor (40%) (figure 14). 80% of the NTCs are cooperating with different travel agencies and tour operators, however seven of the NTCs wish to find more cooperating companies. NTCs have placed their brochures in tourism information centres, hotels, guest houses and hostels. 47% have taken part of tourism fairs and campaigns in cooperation with EAS. More seen in figure 15.

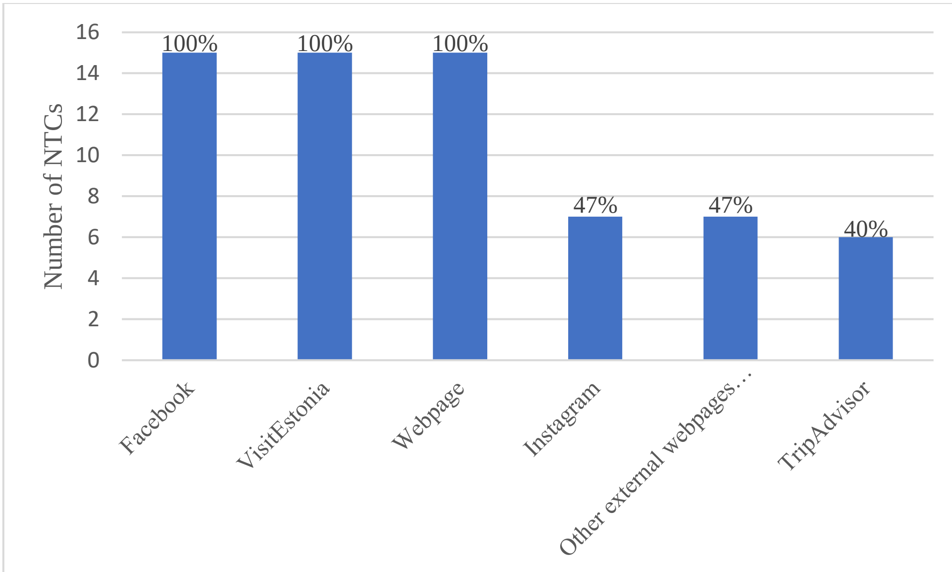

Figure 14. Online marketing channels used by NTCs.

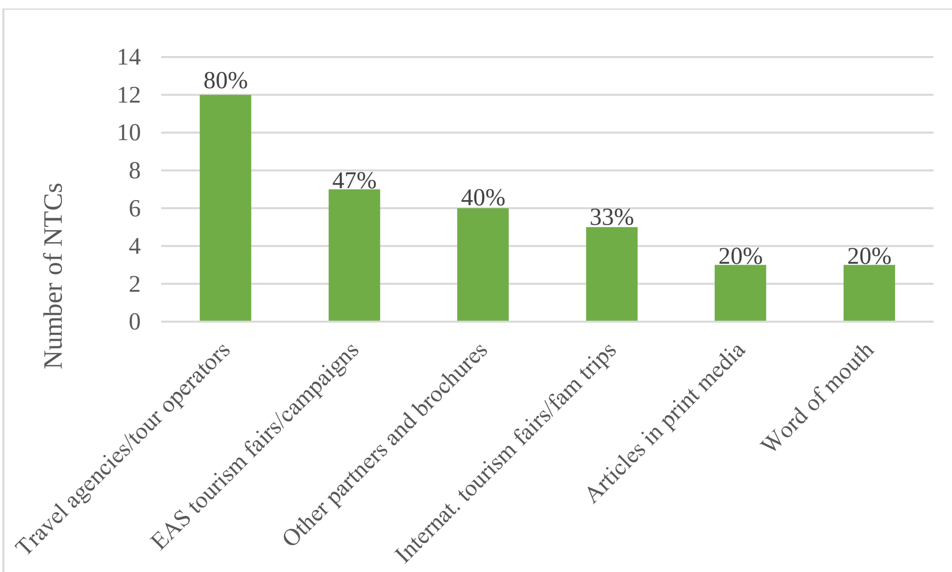

Figure 15. Traditional marketing channels used by NTCs.

Figure 16 shows the most effective marketing channels according to the NTCs. VisitEstonia webpage and cooperation with tour agencies and operators are perceived as channels which bring NTCs the most customers. Google search (one company is also using Google AdWords) that results on landing on the company's webpage is as well a common way for NTCs to be found by potential clients. Few companies believe TripAdvisor, other external webpages, print media and EAS tourism fairs and campaigns to be of high importance in the effectiveness of reaching out to clients.

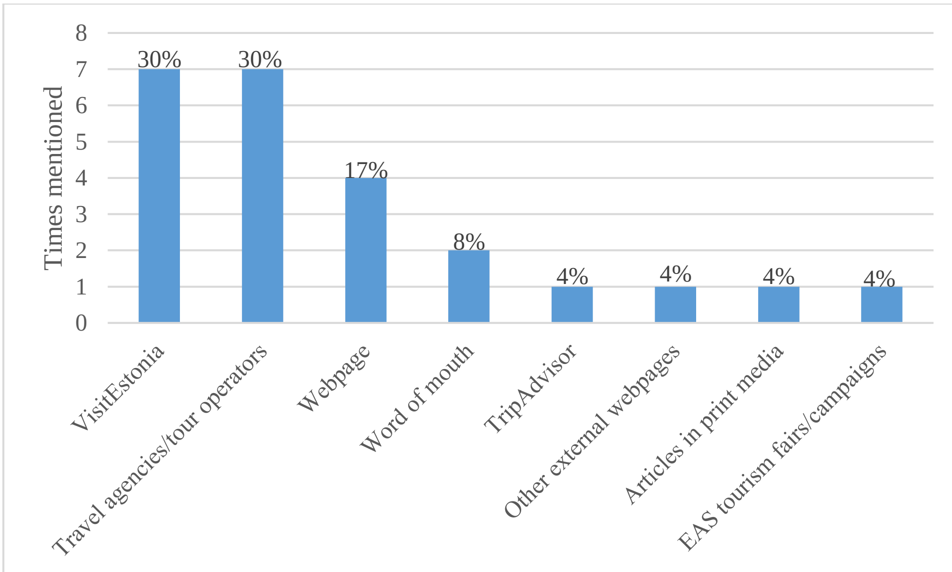

Figure 16. Most effective marketing and sales channels for NTCs.

The effectiveness of a marketing channel is not measured by clear, continuous and systematic methodology by the NTCs. It is rather based on "gut feeling" and random selective inquiries from the clients of the companies:

"We always keep an eye on what is popular nowadays (author's note: popular marketing channels) *and try to keep up with it."* (AT)

"I don't ask everyone, where they get their information. I don't have time for this to ask where they got my e-mail from. Main thing is that e-mail is everywhere available." (AT)

"I have no clue, how to they find us. We have a lot of partners, who have been here before me. Can't really remember how we got them." (AT)

"I have always thought that I should find it out how they find us but I have never done it." (AT)

"At the moment, there is no proficient methodology to measure the effectiveness of marketing. There could be factors I don't even think of." (GI)

“I think the clients are coming from everywhere. I haven’t really researched how they find me, but they come from somewhere.” (SI)

All the NTCs are represented on VisitEstonia webpage and 30% of them also believe that it is the most effective marketing channel for their company. However, there were several concerns expressed about VisitEstonia webpage itself:

“Visit should be a bit more realistic. We actually don’t have so extraordinary possibilities. You can’t really see a bear on every corner.” (AT)

“Visit’s minus is that it’s very slow, specially the mobile-friendly version.” (GI)

“VisitEstonia search word setup is badly structured. Under nature activity category there is RMK fireplace. No international tourist goes to a fireplace!!! They go on a hike with Tarmo or they go paddling in Lahemaa with Bert not to make fire in a forest. Very blurry structure.” (SI)

There were concerns and confusion about EAS new organization structure of the tourism department and the communication with it. Next quotes describe the overall NTCs attitude towards EAS:

“Everybody was hoping and expecting, that now something great will come. In reality it’s worse than the old system. It’s one big hotchpotch.” (AT)

“Last year EAS has had so many structure changes, so everything is a bit blurry now. No one wants to waste their money on something that they are not sure actually works.” (GI)

“The new structure doesn’t have the capacity to give attention to nature tourism sector. The people we had arrangements were laid off.” (GI)

“EAS had big changes, system changes drastically. With the old system things were working out well but the new one… well, there is something, but I don’t really understand what is happening there.” (SI)

“Communication and cooperation is half-hearted and weaker.” (SI)

Almost all the NTCs see great benefits of regional united cluster marketing. Some of them have been part of EAS campaigns and international tourism fairs. NTCs feel the need for one NGO, working party or union who would be responsible for cluster marketing of Estonian nature tourism on international markets as well as would be the one united voice of Estonian NTCs on social and public discussions. At the moment, there is no such union. Quotes from the interviews:

"I believe in cluster marketing, which we don't have at the moment. Even though, we have been talking about this for years." (GI)

"If we make strategies and plans ***all the time*** *– do we really need it? Do we want all our capacity to go on organizing meetings? We should have one initiative group, who would become a member of ATTA* (author's note: Adventure Travel Trade Association) *for example. There is a lot of desipience, little actual content."* (GI)

"We don't have a separate union or a work group who would act in the interest of nature tourism companies. I believe that this group is necessary in all different public discussions. We are stronger together. Then it's also easier to communicate with EAS." (SI)

"We don't have a good NGO. We need one active person in the front, who would go to EAS, who would maunder, manage and do and stand for the international marketing of Estonian nature tourism." (SI)

Development

When it comes to identifying and developing new services to offer to clients, there are several different factors NTCs are taking into account. Some NTCs mentioned that new tours are developed based on a client's first inquiry and interest. Almost all NTCs try to offer flexible custom-made tours that meet the needs and wants of a customer. Several times there was also mentioned that tour guides, NTCs workers themselves must be passionate and interested in the service under development. The region where the tourism service is offered needs to be unique and attractive, so the (heritage) culture and nature can be connected. All the companies wish to deliver the highest value of the region to their clients. Few times was also mentioned "*something new, different and special*" when developing new services. To identify areas of improvement and generate solutions of the newly developed trips, it is tried out by the NTCs and their friends themselves as a "sample trip".

There are several factors that NTCs need to improve to reach out to more clients and offer a high-quality service. Table 7 gives and overview of all the activities NTCs want to conduct. Considerable amount of areas for improvement are in the field of marketing, service and online activities.

Table 7. Activities NTCs believe they need to conduct to reach out to more potential clients and offer a high-quality service (most mentioned problematic areas written in bold).

Online marketing	Other marketing	Service	General
Be more active on social media. Update, organize and structure company's webpage. Have a blog. Be available on TripAdvisor.	**Cluster marketing, more cooperation with other NTCs.** **Participate more on international tourism fairs.** Brochures to hotels, hostels, guest houses, tourism information centres. Do more network marketing. Target new client groups (such as cruise tourists). More familiarization trips and journalists.	**Find more partners (tour agencies and operators).** Improve service, offer full package (organise a pick up from airport, tour only in one language). Find professional nature tour guides. Find an employee to work on marketing and sales.	Change the mindset of people so they would like to spend more time in nature (school trips, nature TV-shows etc.).

There are several factors that prevent NTCs from improving (table 8). Estonian NTCs mostly lack financial resources to participate on international tourism fairs and be part of tourism organisations that require membership fees. Very problematic is also finding a professional nature tour guide who would have thorough knowledge of nature and would know other foreign languages than just English. NTCs also lack time for marketing activities and to go on international tourism fairs. There is also a high confusion about EAS new organisation structure of the tourism department and how their work will start affecting NTCs.

Table 8. Lack of NTCs resources (most mentioned problematic areas written in bold).

Finances	Staff and service	General
To participate on internat. fairs **To be part of tourism organisations** To pay for the marketing and sales representative To pay for tourism information centres to keep brochures there To offer a full package To pay for online marketing tools (Google Ads, PPC)	**No partners** (tour agencies and operators) **No professional nature tour guides** (nature photographer, language skills, thorough knowledge of nature) No available high quality accommodation on high season No marketing and sales representative	**Estonia not well-known nature tourism destination** Disappearing of valuable nature areas (intensive logging) Disappearing of semi-natural heritage sites (seashore meadows)

Time	Knowledge
For online marketing **To go on international fairs** For being active on social media For developing new services	**Of the purpose of EAS new organisation structure of the tourism department and how is it going to affect NTCs** Of online marketing

In this thesis, there were 6 companies (of which 5 are AT) who had more than 2000 clients per year (2015). They are considered bigger companies. On table 9 there can be seen the comparison between bigger and smaller NTCs. The comparison helps to understand the aspects making the company more capable to tend higher number of visitors.

Table 9. Differences between small and big NTCs.

Small nature tourism company (less than 2000 clients per year in 2015)	Big nature tourism company (more than 2000 clients per year in 2015)
Less different services/offers	More different services/offers
Less additional services offered	More additional services offered
NTC not as a main income provider	NTC as a main income provider
Less collaboration partners	More collaboration partners
Local community less involved	Local community more involved
Narrow (or new) client base	Wide client base developed
Few people in charge of everything (running the company/conducting tours/marketing/sales etc.)	Wider number of staff in charge of different departments

For better understanding of Estonian nature tourism sector and its current state there were also interviews with Maaturism and EAS conducted. There is the development of Estonian nature tourism sector, service quality and marketing discussed. More of that in the next chapter.

7.2. Interviews with tourism organisations' representatives

Representatives of EAS and NGO Estonian Rural Tourism (MTÜ Eesti Maaturism, hereafter: MT) believe that current situation of Estonian nature tourism is satisfactory. Information and awareness of Estonia and its nature is on the rise, however often they still have to explain to foreigners where is Estonia located. EAS is stressing the importance of conference tourism development where nature and adventure tours can be offered as additional services. MT believes that development of Estonian nature tourism sector is "*very chaotic*" without any consistency:

"*Development is happening only in short periods. However, if we want to achieve national impact, we need long-time cooperation."* (MT)

"We are in a danger to become the shadow of other countries." (MT)

There are several factors that interviewees believe are affecting the increase of international clients:

1) NTCs being active in marketing themselves (going to fairs, doing lobby work);
2) NTCs having a wide range of activities to offer;
3) Having a highly knowledgeable (nature tour) guide who can speak foreign languages;
4) Being represented on Visitestonia.com and have well-functioning webpage;
5) Ability to offer flexible service and full packages;
6) Cooperation with other NTCs and companies (tour agencies/operators, accommodation etc.).

EAS believes that main obstacles for Estonian NTCs to reach more international clients is absent cooperation between NTCs and united cluster marketing. In addition to that MT also mentioned that Estonia does not have a solid air traffic, there is a strong language barrier and similarity with services neighboring countries are offering. MT also raised concerns about VisitEstonia webpage because *“finding relevant information is difficult, it’s not clear and unambiguous.”*

MT also finds weaknesses in the quality of services, because at the moment there is no qualification criteria NTCs should reach for. EAS is working out the qualification criteria, which is “*basically guidelines for tourism companies to stay in the competition*”. According to EAS first companies will test the system in the second half of year 2017.

EAS marketing activities include participating in international fairs, familiarization trips, writing theme-based inspirational articles, different campaigns. MT is not taking part of nature tourism sector international marketing activities because they do not have the resources or time for that. MT is, however, ready to offer support in that matter if they had additional resources. The effectiveness of marketing is not measured. EAS finds it to be difficult. There is no analyst for that as well as effect of familiarization trips and visiting fairs is “*long-lasting and not that fast*”.

EAS and MT both believe that successful international marketing is the most effective in cooperation between NTCs with forming a cluster:

“Cooperation is the keyword! We need a contact person or an NGO who would draw together the interests and problems of NTCs.” (EAS)

“We need one connected message if we wish to enter international market.” (MT)

EAS and MT encounter same problems in forming this cluster:

“No one is taking the responsibility to be active in this and make a project. Everybody is doing their own thing but it seems no one really wants to share. /.../ They say we need one body in front and so on, but who will be that body?” (EAS)

“Everybody is doing something but there is no wholeness and consistency. It’s a huge work. We are ready to do this but we need additional resources.” (MT)

7.3. Webpage analysis

According to the webpage analysis, in addition to Estonian language 14 webpages were also available in English (results shown in figure 17). 5 companies have the webpage available in more than two languages. Almost all webpages have spacious layout (13) and good background and text colour contrast (12). Links are easy to find on all webpages. Most (13) have comfortable text size. Information is up to date on most of the webpages (10).

Almost all the companies provide informative description of activities and services (12) and only one company does not provide prices of the services. Contact information is easily found on 14 pages. Additional information such as a photo gallery, a blog or articles are well represented on 8 webpages while 2 companies do not have any additional information.

Almost half of the companies (8) do not have online feedback possibility while 7 have the feedback possibility on their webpage and/or on external site, such as TripAdvisor for example. Only one company has an online booking system.

According to Google Page Speed Insight tool 9 companies ranked between 50-84 on their webpage loading time, which makes it acceptable. 5 ranked below acceptable and 1 ranked above acceptable. According to Google Mobile-Friendly test 5 companies do not have mobile-phone friendly webpage.

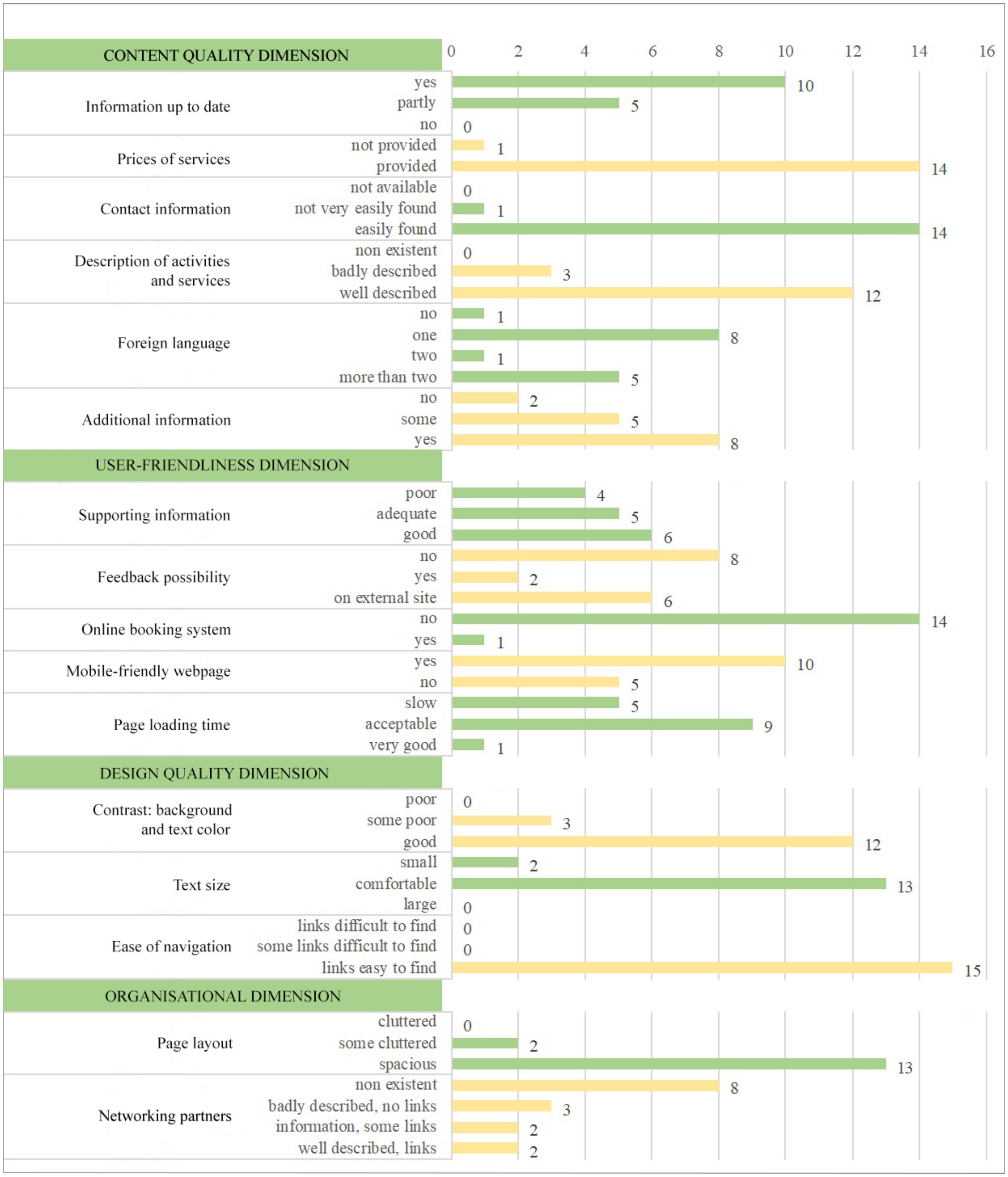

Figure 17. Results of Estonian nature tourism companies' webpage analysis.

On more than half (8) of the webpages there are no networking partners or local tourist attractions listed, while on 2 webpages they are well described. Supporting information (maps, public transport, coordinates etc.) for finding location of the start of the tour are well described on 6 pages while 4 pages have poor description.

7.4. Visit Estonia webpage audit

In the year 2016, there were 5 171 458 webpage visits on Visitestonia.com. In figure 18 there can be seen the number of visits by country. Approx. 1% (48 049) of all the visits were on the "Nature and Wildlife" sub-page. Most of the "Nature and Wildlife" page visits were done on English page. The page in German was also of high importance. More of that in figure 19.

The bounce rate of English page was the highest 58.25. The bounce rate of German and Swedish pages was high as well (34.42 and 31.88). Estonian, Russian and Finnish bounce rates were under 15. High bounce rate means that the visitors does spends little time on the page. It may indicate that the content is not engaging.

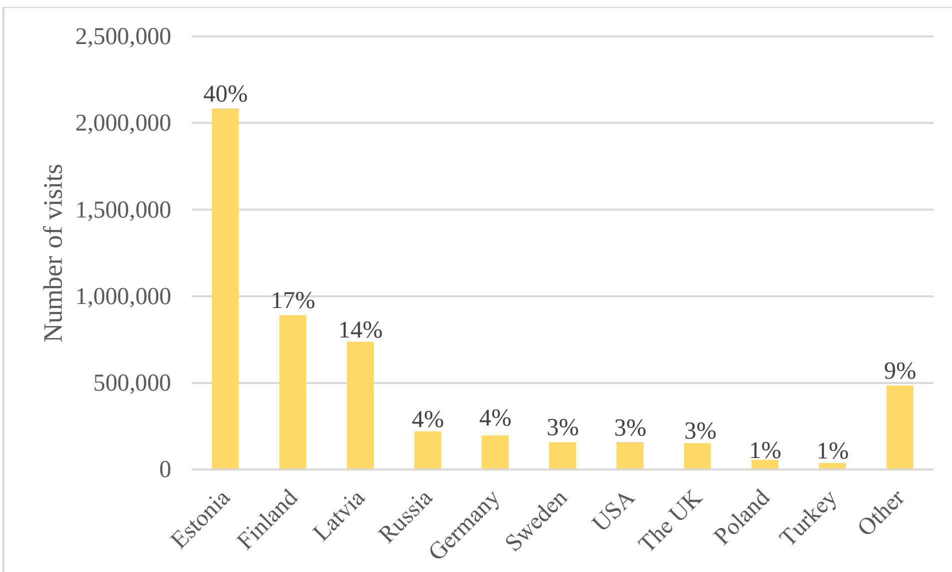

Figure 18. Number of Visitestona.com webpage visits by country in year 2016.

There were altogether 178 814 Google organic searches (no AdWords) which resulted with clicks on the page. "Nature and Wildlife" category clicks are shown on table 10. There are shown only the Google search results which collected 40 or more clicks in year 2016.

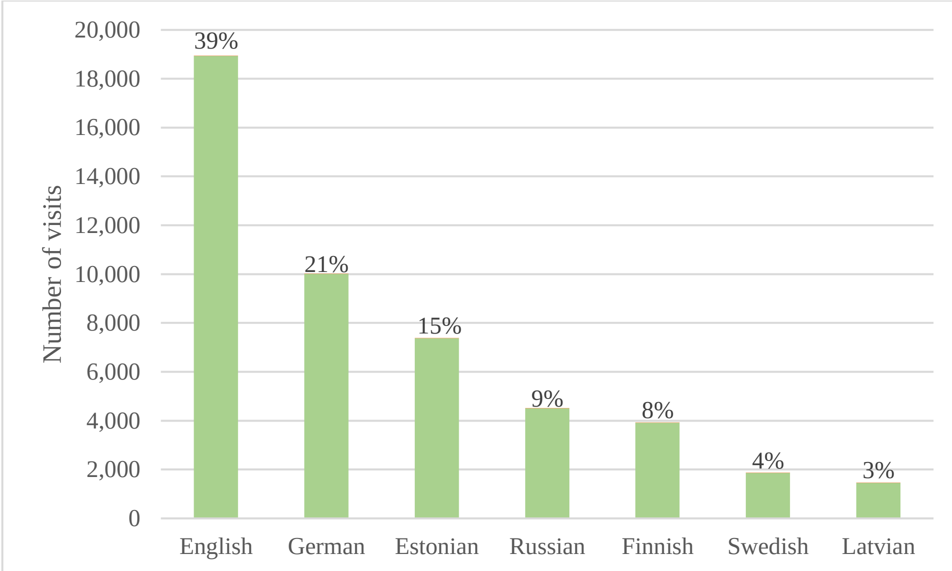

Figure 19. "Nature and Wildlife" page visits by the language.

Table 10. Google search results which were clicked in year 2016.

Google search results on which was clicked	English equivalent	Number of clicks	Search language
lahemaa national park	Lahemaa National Park	426	English
saaremaa	Saaremaa	251	Estonian/English
lahemaa	Lahemaa	150	Estonian/English
munameģis	Munamägi	136	Latvian
lahemaa nationalpark	Lahemaa National Park	101	German
soomaa national park	Soomaa National Park	100	English
kihnu	Kihnu island	81	Estonian/English
jägala waterfall	Jägala waterfall	73	English
сааремаа	Saaremaa	68	Russian
ösel	Saaremaa	66	Swedish
hiiumaa	Hiiumaa	63	Estonian/English
matsalu national park	Matsalu National Park	61	English
valaste waterfall	Valaste waterfall	59	English
hiidenmaa	Hiiumaa	56	Finnish
лахемаа	Lahemaa	51	Russian
sāremā	Saaremaa	50	Latvian
ведьмин колодец	Tuhala Witch's Well	49	Russian
dagö	Hiiumaa	43	Swedish
водопад валасте	Valaste waterfall	43	Russian
vilsandi national park	Vilsandi National Park	41	English
estland natur	Estonian nature	40	German

Almost half of Google searches were about national parks (930, 46%). Islands, nature sights (Munamägi, Estonian nature, Tuhala Witch's Well) and waterfalls were googled as well. More in figure 20.

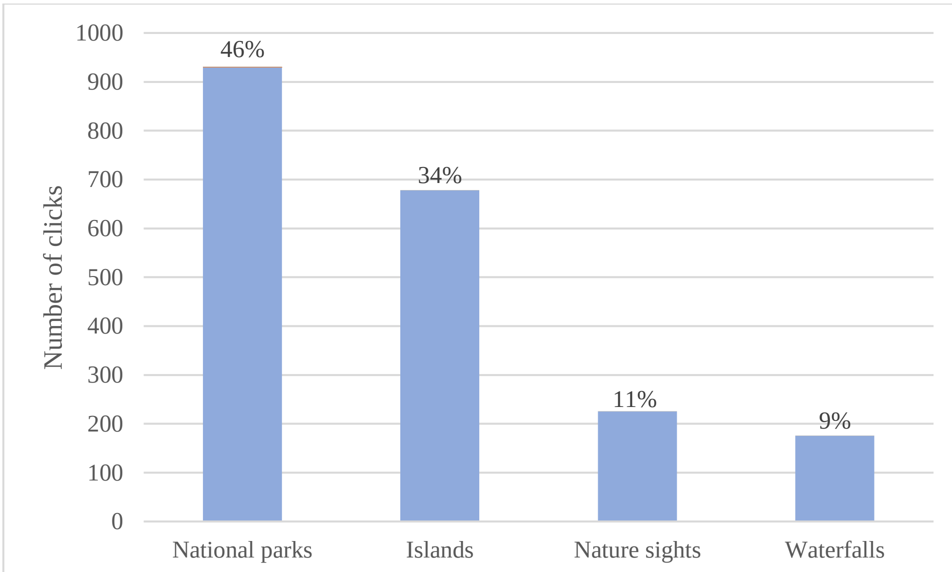

Figure 20. Number of clicks per topic.

On table 11 there can be seen specific Visitestonia.com pages which were clicked. The most pageviews has Jägala waterfall which was in English. Other pages in English that collected high number of pageviews were about Keila waterfall, Viru bog, Rummu quarry, Piusa caves and Kaali meteorite crater. The number of pageviews is higher than the number of sessions because visitors could view one page more than once.

Table 11. Visit Estonia clicked pages in foreign languages which ranked in first 500 pages.

Page Title	English equivalent	Session	Pageview	Language
Jägala Waterfall, Estonia	Jägala waterfall	3313	5472	English
Ведьмин колодец в Тухала, Эстония	Tuhala Witch's Well	2994	4736	Russian
Водопад Кейла, Эстония	Keila waterfall	2184	4515	Russian
Lielā Munameģa skatu tornis, Igaunija	Munamägi	2159	3484	Latvian
Чудское озеро , Эстония	Peipsi lake; fishing	2086	3975	Russian
Keila Waterfall, Estonia	Keila waterfall	1914	3165	English
Водопад Ягала, Эстония	Jägala waterfall	1669	3852	Russian
Jägalan vesiputous, Viro	Jägala waterfall	1546	2773	Finnish
Viru Bog study trail, Estonia	Viru bog	1374	2724	English

Page Title	English equivalent	Session	Pageview	Language
Keilan vesiputous, Viro	Keila waterfall	1251	2576	Finnish
Peipusa ezers, Igaunija	Peipsi lake; fishing	1251	2184	Latvian
Рыбалка на Чудском озере, Эстония	Peipsi lake; fishing	1227	1718	Russian
Jegalas ūdenskritums, Igaunija	Jägala waterfall	1129	3705	Latvian
Водопад Валасте, Эстония	Valaste waterfall	1129	2552	Russian
Rummu quarry, Estonia	Rummu quarry	1031	1374	English
Kännu alpaca farm - the largest in Estonia!	Small zoo	908	1399	English
Piusas alu apmeklētāju centrs, Igaunija	Piusa caves	810	2159	Latvian
Piusa Caves Visitor Centre, Estonia	Piusa caves	712	1374	English
Kaali field of meteorite craters, Estonia	Kaali meteorite crater	663	1153	English
Makšķerēšana uz Peipusa ezera, Igaunija	Peipsi lake; fishing	663	1055	Latvian

GAP analysis

On table 12 can be seen the GAP analysis of Estonian nature tourism sector. GAP analysis gives an overview of Estonian nature tourism sector problematic areas and development opportunities. There is written down the current state of Estonia as a travel destination, marketing, service quality and cooperation aspects. Desired future state and actions to implement are recommended. GAP analysis concludes results of the collected empirical data of this thesis. Actions to implement are mentioned briefly in the GAP analysis and are further explored in the discussion part of this thesis.

Table 12. GAP analysis of Estonian nature tourism sector.

CURRENT STATE	DESIRED FUTURE STATE	ACTION TO IMPLEMENT
Estonia – the country of emerging tourism		
Estonia is not a well-known nature tourism destination	Estonia is a well-known nature tourism destination	- systematic, continuous national marketing and branding; - cluster part of international tourism organisation (like ATTA for example); - share knowledge and best practices.
Chaotic, unstructured development of Estonian nature tourism sector	Continuous, structured development of Estonian nature tourism sector	- forming a cluster with a responsibility of ensuring continuous development; - structured development plan.
Marketing		
No clear, continuous methodology to measure the effectiveness of marketing	Clear, continuous methodology to measure the effectiveness of marketing	- systematic queries from clients of NTCs (how they got information of the company, why they decided to use the services of that company etc.); - systematic queries from the NTCs conducted by EAS (or the representative of a cluster); - use of measurable online marketing tools.
Less than 50% of companies are offering valuable, relevant additional information on social media (including blogs, galleries etc.)	100% of companies offer valuable, relevant information on social media and their webpage on a regular basis	- informational seminars/trainings on (online) content marketing.

53% of companies have online feedback possibility on several sites	100% of companies have online feedback possibility on several sites	- training in web based services; - access to specialist advice.
67% of companies have mobile-friendly webpage	100% of companies have mobile-friendly webpage	- training in web based services; - access to specialist advice.
7% of companies have fast and optimized webpage	100% of companies have fast and optimized webpage	- training in web based services (SEO); - access to specialist advice (financed from membership fees of belonging to a cluster).
Service quality		
Small number of professional nature tourist guides working for NTCs.	Increased number of professional nature tourist guides working for NTCs.	- specialized English/German courses on relevant university studies; - clear qualification criteria from EAS; - government financed nature tourist guide trainings; - workshops/information/networking seminars for NTCs and guides to connect them.
Not enough clients on low season	Increased number of clients on low season	- offer nature tourism services to conference tourists as additional activities; - systematic, continuous national marketing and branding.
No clear, unambiguous guidelines for NTCs on what is and how to offer a high-quality service, no Quality Management System QMS)	Clear, unambiguous guidelines for NTCs on how to offer a high-quality service	- clear qualification criteria by EAS (under development at the moment); - clear QMS.

Cooperation		
Unclear understanding of EAS new organisation structure of the tourism department and how is it going to affect NTCs	Strong and continuous cooperation between EAS and NTCs	- Form a cluster - Information seminars with EAS and NTCs for better understanding - Identifying cooperation methodologies/structures
80% of companies cooperating with travel agencies/tour operators	100% of companies cooperating with travel agencies/tour operators	- Share best practices - Workshops to showcase NTC products and services to TAs/TOs and - TAs/TOs explaining to NTCs what their requirements are to incorporate NTCs into their packages

Further details of actions to implement are seen in the discussion. Forming an Estonian nature tourism cluster and the benefits of it are as well seen in the next chapter. The purpose and function of this cluster are identified. International marketing possibilities are discussed as well as measuring the effectiveness of marketing. Suggestions for sharing best practices, development and (online) marketing are recommended.

8. DISCUSSION

Estonia – the country of emerging tourism

Tourism is one of the fastest growing industries in the world. Popularity of nature tourism is on the rise. More and more people around the world are engaged in nature-based tourism including adventure tourism and general as well as special interest nature tourism. Almost half of the tourists choose adventure travel (Global Report on Adventure Tourism 2015: 20). Considerable number of international visitors of Estonia choose to spend time in nature, whether it is hiking or an easy stroll on the park (Tõnurist & Sõstra 2015: 8).

It is also said that Estonia is one of the emerging adventure tourism destinations with great potential (Adventure Tourism Development Index: Report 2015: 8). Eastern Europe and Scandinavia are in the top list of adventure tourists' interest (Adventure Travel Industry Forecast 2015: 8). Estonian genuine and unspoilt nature attracts special interest tourists such as bird-watchers and other wildlife tourists. They are mostly from Western Europe (Germany, the Netherlands, Belgium, The UK etc.). There were 6 companies in this research that had more than 2000 clients per year. Of these companies 5 were adventure tourism companies, which shows that adventure tourism services are popular. However, despite a wide range of potential nature based activities, Estonia is not a well-known nature tourism destination. Great deal of western Europeans are not aware of Estonian geographical whereabouts not to mention the possibilities of tourism.

The representative of Maaturism mentioned that the reason might be because of not that solid air traffic and similarity with services neighbouring countries are offering. Indeed, Riga and Helsinki airports have much more air traffic and direct flights compared to Tallinn airport which might result with visitors staying in Latvia or Finland rather than taking another flight to Estonia. Estonia, Latvia and Lithuania are usually referred to as "the Baltics" among the visitors. Therefore, the region is seen as one whole not as 3 very different countries.

Cluster marketing

The best way for marketing SMEs in a less known small country like Estonia is through a cluster. Tourism cluster increases a destination's competitivity with its ambition to reinforce the destination's identity by making it unique compared to other destinations (Andersson & Ekman 2012: 11). The most important benefits of belonging to a cluster for Estonian nature tourism companies are internationalisation and higher perceived quality (*Ibid.*: 25). Also, operating in collaboration evokes a healthy competition among companies which raises the service quality as well as management skills.

As the empirical data of this thesis shows, Estonian NTCs lack finances for extensive international marketing, to participate on international fairs and to be members of beneficial tourism organisations. They also lack the time to take part in these activities. Clusters are especially favourable to small or medium scale enterprises (like Estonian NTCs) since they can lower the cost of marketing. SMEs can benefit from joint marketing and be more visible in large international markets (*Ibid.*: 27). The cluster can be an integrated and coordinated support system for effective destination marketing. The cluster would take part of international events and fairs introducing the possibilities of Estonian nature. This cluster can also be a body for extensive research in the field of nature tourism. Some examples would include nationwide research on international customer satisfaction, expectations, perceived destination image of Estonia and service quality.

Despite the obvious benefits of an Estonian nature tourism cluster, it has not yet been formed while a majority of the interviewed NTCs, EAS and Maaturism believe that a cluster's main purpose would be international marketing. The cluster could work together with ATTA for example, which is and organisation supporting sustainable adventure travel markets worldwide. Their travel news, research and networks can be highly beneficial for Estonian NTCs. It helps to be up to date with recent trends in the tourism field, to share best practices and to cooperate further with international tourism agencies etc.

A cluster would also be a tool to communicate with different tourism organisations on a national level. It can be a body for exchanging information, impart the problems, needs and wants of NTCs to EAS. Maaturism is ready to be the representative of that cluster, however they lack employees and finances for forming that body. A cluster would also assure continuous development of Estonian nature tourism industry. Currently the development is scattered and happening only in short periods without any consistency. This can result in Estonia becoming the shadow of other countries.

Resources and development

The NTCs cannot rely only on a cluster to be successful and offer a high-quality service. EAS and MT believe that NTCs need to be active in marketing themselves. An increase in international clients would also be witnessed when NTCs would have wide range of activities to offer, would have highly knowledgeable guides, would have the ability to offer flexible service and full packages and cooperate with other companies (tour agencies/operators, accommodation, catering etc.). 80% of the NTCs are cooperating with travel agencies and operators, however need for more consistent and/or new partners is still high. Only 33% of NTCs are taking part of international tourism fairs by themselves (without the help of EAS) while others lack time and finances for participation. However, there are several resources NTCs lack that connect with above mentioned aspects. A majority of NTCs are lacking a highly professional nature tour guide who could speak foreign languages (such as English or German) with a high level of skill.

Marketing and branding are the main factors for long-term growth and competitiveness of a (tourism) cluster (Andersson & Ekman 2012: 11). Developing a brand of Estonian nature tourism could be one of the tasks of a cluster. There was a newly developed brand of Estonia introduced in 2017, stating “our brand is Estonia”. One of the core messages was clean environment and being highly organic. Hence, introducing Estonian nature and the services of NTCs could be through sustainable development and being an eco-friendly country. Great opportunity for introducing Estonian nature and NTCs is thanks to EV100 celebrations in 2018 and Presidency of EU Council in 2017.

Based on the results of this thesis, it can be said that the Estonian nature tourism sector has several deficiencies that reduce its capacity and growth. However, bigger companies (more than 2000 clients per year) can be taken as examples for smaller ones in being more capable of tending to more clients. Being able to offer a wider range of (additional) services and tours that meet the needs and expectations of international tourists is one of the key factors for company growth.

However, offering a wider range of services can be difficult for smaller companies since they lack the necessary resources (staff, finances, time). Forming a cluster can help the Estonian tourism sector to overcome such problems with resources. Companies also lack the resources for offering thorough nature tour guide training for their staff. It can be said that companies are also not interested in investing time and finances to this due to the problem of seasonality which can result in newly trained professional staff members leaving the company sooner than expected, since seasonal jobs do not offer a steady (yet desired) income for guides. Therefore, government financed nature tour guide training could help to overcome the fluctuation of seasonal staff members. General knowledge tour guides are nevertheless easier to find. Therefore, for capacity building, focusing more on GI tourists can be one strategy as well.

Bigger companies have more collaboration partners which results in more clients. Workshops, get-to-know meetings, as well as clear understandings of stakeholders' qualification criteria can result in increased and tighter collaborations between NTCs and travel agencies/tour operators.

Online marketing

The trend of marketing adventure tourism products is towards disintermediation meaning that the travel agent, the middle man, who has traditionally connected the consumer to the provider is being removed (Global Report on Adventure Tourism 2014: 21). While disintermediation is more relevant in mature adventure markets, over the next few years it will likely also cause a change in adventure tourism emerging economies (Beckmann & Duverger 2014: 21). Estonia is believed to be an adventure tourism emerging country meaning the change will also affect the services of Estonian NTCs (*Ibid.*). Therefore, it is necessary to be active online, have a well-functioning webpage, offer the possibility for the customers to write reviews and be available on social media such as Facebook and Instagram. The potential customers can reach the company directly and have tangible proof of a service company.

69% of adventure travellers seek travel information by online search (Adventure Tourism Development Index 2015: 4). Almost half of travellers reach out to social media for travel planning and travel inspiration (TripAdvisor Survey Reveals… 2012). As the empirical data of this thesis shows, all the NTCs have a webpage and a Facebook page. All of them are also represented on Visit Estonia webpage. However, less than half have a TripAdvisor or Instagram account and only one company mentioned TripAdvisor as one of the most effective marketing channels. Therefore, majority of NTCs are not taking advantage of online marketing possibilities meaning it can be difficult for potential clients to find the company online. This can result in uncollected revenue.

However, the majority of the NTCs understand the need to be active online. They believe that being more active on social media, having a blog and TripAdvisor account can help with reaching out to potential clients. A couple of NTCs found the need to update, organize and structure their company's webpage. A webpage as one of the most effective marketing channels was mentioned 4 times which is not that high number. However, a company's webpage is one of the most important tangible proofs of a service company. Hence, the webpage must be easily found, optimized, fast and mobile-phone friendly. Almost half of the travellers use mobile-phones to search for information while on a vacation (TripAdvisor Global Study Reveals… 2013).

A webpage must be found on the first page of Google organic searches because they collect 90% of the clicks while paid advertisements receive only 10% of the clicks. Only 10% of people continue on to the second page of Google search (Sharp 2014). For optimising a webpage there are several SEO tools and aspects to consider. In this thesis, NTCs webpages were analysed and 16 different factors measured which, when improved, can result in the webpage ranking higher on Google search and making the webpage more user-friendly. In the next paragraphs, there are most problematic factors under discussion.

As providing relevant content to a webpage visitor is of high-importance, galleries, blogs and other additional information makes the webpage more interesting for a visitor. It makes the company more tangible. Tourist satisfaction is strongly related to the meeting of expectations, which are built on destination image (Vajčnerová *et al.* 2013: 2918). Therefore, having a blog, gallery, articles on a webpage are helping the company to show the uniqueness of the services, natural attractions and shape the perceived destination image of a potential customer. Only 8 companies had such kind of additional information very well represented while 2 did not have any galleries, blogs, articles.

Only two webpages had referrals to other useful and relevant webpages (networking partners, accommodation offers, local tourism organisations etc.). Being connected to high-quality webpages is a sign for Google that the webpage is active and not with spammy content but trustworthy (which helps ranking higher in Google searches). It gives a better grasp and understanding of the destination to a potential client.

Empirical data shows that almost half (7) of the companies do not provide any online feedback possibilities (other than Facebook), making the webpage less interactive with clients. In page speed and loading time test only 1 company ranked high while 5 ranked below acceptable. Also 5 companies do not have mobile-friendly website. Where the page loading time is not fast enough for visitors this can result in losing interest in the webpage as well as ranking lower in Google searches. Therefore, it is highly necessary for the companies to improve their webpages concerning these factors. Being more active on social media and having an optimized webpage will make the company more easily found for potential customers. Estonian NTCs still have several improvement points regarding online marketing and visibility.

Effectiveness of marketing

Visit Estonia webpage and cooperation with travel agencies/tour operators were mentioned as the most effective marketing channels and tools. This means the NTCs get the most customers from these channels. Although, the effectiveness of marketing is not measured by clear, continuous and systematic methodology by the NTCs. It is rather based on “gut feeling” and random selective inquiries from the clients of the companies. There definitely is a need for clear methodology for measuring the effectiveness of marketing however, as was stated by some NTCs, EAS and Maaturism, it is difficult to be done in tourism sector. For example, familiarization trips or visiting a tourism fair can have a long-lasting effect meaning the results could be seen maybe in couple of years if not later. Systematic requires from customers about the channels they found the company can help to improve marketing strategy. Hence, it is necessary for the NTCs as well as regional and national tourism organisations to be up to date with latest tourism and marketing trends and best practices. Using suitable and most recent marketing strategies can increase the effectiveness of marketing.

Service quality

According to the Total Quality Management model (hereafter TQM) to offer a high-quality service there is a need to identify the service users, their needs and expectations (Moscardo & Saltzer 2004: 169). The NTCs have a somewhat clear understanding of their clients. It is widely believed that the segment of international nature tourists is based on interest and values, not demographics. However, there are some demographic related characteristics. Nature tourists tend to be older than 25 years, have at least average income and at least some higher educational degree.

The NTCs believe they know what foreign visitors expect from the service and of Estonia. The most frequently mentioned expectation was "high-quality customer service". As seen from the results and the prior discussion of this thesis, NTCs still lack some aspects to offer a high-quality service. For example, it is believed that professional staff is expected, however it is difficult to find highly knowledgeable nature tour guide, as well some companies lack the time to do marketing or lack the finances to hire a person for that. According to the SERVQUAL model "reliability" is perceived as the ability to perform the promised service dependably and accurately (Said *et al.* 2013: 64). Nevertheless, the "reliability" aspect can be disturbed if there is lack of professional staff.

Additional information about the overall country is believed to be expected as well. Giving out general information about Estonia on a tour is something that all the companies are doing, needless to say. However, as is seen from the results of the webpage analysis, great number of companies are not offering clear, interesting additional information about relevant topics on their webpages. According to the SERVQUAL model, having tangible visually appealing materials that reflect local influence, is an important aspect to be perceived as a high-quality service company (*Ibid.*: 64). Creating content for marketing can be one of the tasks of a marketing specialist. Although, as said previously, there are NTCs who do not have resources for hiring one or time to do it themselves. Most of the companies are able to offer flexible service which is considered one of the main expectations of international clients.

Based on identifying the users and their expectations, effective design is developed and implementation of service is performed. TQM requires continuous quality monitoring and evaluation to identify areas of improvement. As seen from the results, the NTCs are aware of the areas that they need to improve and the most often mentioned was the need to be more active online.

Visit Estonia webpage

There were several concerns raised about the user-friendliness of Visit Estonia webpage. NTCs as well as Maaturism believe the search word structure to be somewhat difficult and not too helpful, information is scattered and not easily found. Nevertheless, the "click" analyse of the "Nature and Wildlife" page can help the NTCs to understand better what are the international tourists' interests. Based on the information they can either develop new services then write blog posts about these topics, optimize their webpage accordingly and share related information on their social media accounts for marketing and purposes of shaping the destination image.

Almost half of Google searches which resulted with landing on Visit Estonia page where about national parks, such as Lahemaa and Soomaa being the most popular ones. Most clicked page was about Jägala waterfall (English). Also on Latvian and Finnish pages Jägala waterfall was of high interest. Keila waterfall, Viru bog, Rummu quarry and Piusa caves got high number of clicks on pages in English. There were several queries made as well in Russian. Most of them are, however, Estonian Russians.

Approx. 1% of all Visit Estonia webpage visits were on “Nature and Wildlife” sub-page showing that compared to other sub-pages, overall interest in nature activities is low. This can be due to several reasons. Firstly, Estonia is not a well-known nature tourism destination (Eesti Riiklik Turismiarengukava 2013: 7). Secondly, MT and NTCs have raised concerns about Visit Estonia webpage user-friendliness and structure. Difficulty to navigate on the page and to find relevant information can result in lower clicks.

CONCLUSIONS

The aim of this thesis was to give an overview of the Estonian nature tourism business sector. The extent of resources and knowledge of Estonian nature tourism companies to market their services and to offer a high-value service to international visitors was mapped.

To fulfil the goal of this thesis empirical data was collected by using the following research methods:

1) semi-structured interviews with representatives of Estonian nature tourism companies;
2) semi-structured interviews with representatives of both Eesti Maaturism and EAS;
3) measuring the quality of Estonian nature tourism companies' web pages;
4) analysing the data collected from the Visitestonia.com webpage;
5) GAP analysis.

54% of Estonian nature tourism companies are offering services mainly in the field of adventure tourism. 33% of the companies are primarily focused on general interest tourists while 13% offer services suitable for special interest tourists. The most popular activities offered are wildlife watching, hiking by foot and bog-shoeing. 40% of the companies (of which the majority are focused on adventure tourism) have more than 2000 clients per year. However, most of the companies have less than 10% of international clients. Most nature tourists originate from Germany.

There were four main research questions in this master's thesis which were answered as follows.

1) Which marketing tools and channels are used by Estonian nature tourism companies (hereafter: NTCs)?

Most commonly used marketing channels are Facebook, the Visit Estonia webpage, travel agencies and tour operators. According to companies, the most effective marketing and sales channels are the Visitestonia.com webpage and tour operators/travel agencies.

2) Is the effectiveness of marketing measured by the NTCs and how is this knowledge integrated into their business planning?

The effectiveness of marketing is not measured by the NTCs in clear, continuous way. Therefore, it is not systematically integrated into their business plan. NTCs conduct random, selective queries to clients about marketing channels.

3) Which resources and what knowledge do NTCs lack in order to market themselves to suitable target groups and to offer a high-value service?

The Estonian nature tourism sector lacks several strategically important resources and knowledge for marketing and offering high-quality customer services. Rapid growth of capacity is problematic as well. The NTCs mainly lack finances and time to participate in international fairs and to be members of international tourism associations. They have insufficient cooperation partners and suitably skilled and professional nature tourist guides. The NTCs also lack the time for thorough online marketing, although, companies with more than 2000 clients annually have fewer problems with resources.

4) What are the interest of NTCs towards targeting and welcoming international tourists?

The majority of the companies are interested in increasing the number of international clients, but due to lack of professional guides, tending to an increased number of international clients is problematic. Estonia is not a well-known nature tourism destination, therefore most of the companies understand the need for a tourism cluster. Clusters are integrated and coordinated support systems for effective destination marketing. It could also be a body for exchanging information and imparting the problems, needs and wants of NTCs to EAS. There were suggestions made in the GAP analysis for overcoming the problems and were thoroughly considered in the discussion part of this thesis.

Further research into this can be conducted including gathering data on international clients' expectations of using the services of Estonian NTCs which would be useful for improving the service-quality of the NTCs. Data gathering more widely on international tourists' expectations and perceived destination image of Estonia overall, which would be useful for creating better marketing strategies.

EESTI LOODUSTURISMI ETTEVÕTETE VALMISOLEK PAKKUDA OME TEENUSEID VÄLISKÜLASTAJATELE

Resümee

Käesoleva magistritöö eesmärgiks oli anda ülevaade Eesti loodusturismi sektorist ning kaardistada Eesti loodusturismi ettevõtete ressursid ning teadmised oma teenuste turundamiseks ja kõrgekvaliteedilise teenuse pakkumiseks.

Eesmärgi täitmiseks ja empiiriliste andmete kogumiseks kasutati järgnevaid uurimismeetodeid:

1) Pool-struktureeritud intervjuud Eesti loodusturisimi ettevõtete esindajatega;
2) Pool-struktureeritud intervjuud MTÜ Eesti Maaturism ja EAS-i esindajatega;
3) Eesti loodusturismi ettevõtete kodulehtede kvaliteedianalüüs;
4) Visitestonia.com internetilehekülje andmeanalüüs;
5) GAP-analüüs (erinevuste analüüs).

54% Eesti loodusturismi ettevõtetest pakuvad enamasti seiklusturismi teenuseid. 33% ettevõtetest suunavad on teenused üldise huviga loodusturistidele ning 13% on spetsialiseerunud süvaloodushuviga turistidele. Kõige populaarsemad pakutavad tegevused on elusloodue vaatlused, jalgsimatkad ning räätsamatkad rabas. 40%-l ettevõtetest on rohkem kui 2000 klienti aastas. Neist suurem osa on seiklusturismile spetsialiseerunud ettevõtted. Küll aga on enamikel ettevõtetel väliskliente vähem kui 10%. Suurem osa loodusturiste on pärit Saksamaalt.

Antud magistritöös oli püsitatud neli uurimisküsimust, mis leidsid järgnevad vastused:

1) Milliseid turunduskanaleid Eesti loodusturismi ettevõtted kasutavad?

Turunduskanalitena kasutatakse kõige rohkem Facebook-i, Visit Estonia internetilehekülge, reisikorraldajaid ja -operaatoreid. Kõige efektiivsemad turundus- ja müügikanalid on Visit Estonia lehekülg ning reisikorraldajad ja -operaatored.

2) Kas Eesti loodusturismi ettevõtted mõõdavad turundustegevuse efektiivsust ning kuidas on see kohandatud nende äritegevuse plaani?

Eesti loodusturismi ettevõtted ei hinda turundustegevuse efektiivsust süsteemselt. Seega, ei ole see ka nende äritegevuse plaani süstematiseeritult integreeritud. Ettevõtted viivad läbi valikulisi ning juhuslikke järelpärimisi klientidelt, kuidas nad ettevõtte kohta infot leidsid.

3) Milliseid ressurssid ja teadmised puuduvad ettevõtetel sobilikele sihtgruppidele turundamiseks ja kõrgekvaliteedilise teenuse pakkumiseks?

Eesti loodusturismi sektoril puuduvad mitmed strateegiliselt olulised ressursid ning teadmised turundamiseks ning kõrgekvaliteedilise teenuse pakkumiseks. Ka sektori võimsuse suurenemine on probleemne. Ettevõtetel puuduvad finantsid ja aeg rahvusvahelistel messidel osalemiseks ja rahvusvaheliste turismiorganisatsioonide liikmeks olemiseks. Ettevõtetel ei ole piisavalt koostööpartnereid ning esineb raksusi professionaalse loodusgiidi leidmisel. Ettevõtetel ei ole ka piisavalt aega põhjalikuks *online*-turunduseks. Küll aga ettevõtetel, kellel on rohkem kui 2000 klienti aastas, on vähem probleeme ressursside leidmisega.

4) Kuidas suhtuvad Eesti loodusturismi ettevõtted teenuste pakkumisse välisturistidele?

Suurem osa ettevõtteid on huvitatud välisklientide arvu suurenemisest. Piisaval arvul professionaalsete töötajate puudumise tõttu on suurel hulgal välisklientide teenindamine piiratud. Eesti ei ole tuntud loodusturismi sihtkoht, seetõttu mõistavad enamik ettevõtteid turismiklastri vajalikkust. Klaster on ühtselt koordineeritud tugisüsteem efektiivseks sihtkoha turundamiseks. Klaster on sobilik üksus ka infovahetuseks, loodusturismi ettevõtete koondatud probleemide, vajaduste ja soovide edastamiseks avaliku sektori asutustele. Eesti loodusturismi sektori probleemide lahendamiseks on GAP-analüüsis välja toodud vastavd lahendused, mida analüüsiti põhjalikumalt käesoleva töö arutelu peatükis.

Tulevased uurimustööd välisklientide ootustest loodusturismi ettevõtete teenuste kasutamises aitavad täiustada ettevõtete teenuste kvaliteeti. Uurimustöö välismaalaste ootustest Eestile ja tajutavast sihtkoha imidžist aitaksid parendada Eesti loodusturismi sektori turundusstrateegiaid.

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APPENDIXES

Appendix 1. Interview questions for Estonian nature tourism companies.

BASIC:

1. For how long has your company been operating?
2. How many people work in your company and what are their tasks?
3. Where does your company mainly operate?

OFFERS

4. What are the main activities you offer to clients?
5. Which are the most popular activities/packages in order of purchasing frequency?
6. How does your business identify new products to offer?
7. With what frequency do you offer your activities?
8. Do you offer any additional services?
9. In what languages are your tours offered? Is it necessary to offer tours in other not mentioned languages as well?

CUSTOMERS

10. How many of your clients are international visitors? (rough percentage, in numbers)
11. Is the number of international tourists increased in last 5 years?
12. What kind of tourists are you focused on? (groups, individual, organized tours etc.)
13. Please describe your typical clientele.
14. What do you think, what do foreign clients expect from your services and Estonian nature?
15. How are your tours organized?

MARKETING

16. What channels are used for reaching foreign clients and marketing your company? How do you find foreign clients? Do you monitor your marketing activity? Which channel is the most effective (as in reaching the most clients)?
17. What (else) can you do to be (more) reachable to foreign markets?
18. What kind of resources your company lacks? Are there any obstacles which don't let you reach foreign markets and offer a quality service?

COMPANY DEVELOPMENT

19. How do you find staff? Professional tour guides, instructors? Is it easy to find them? (if it's a "1-man's-company" then a question would be, if they even need more staff).
20. Do you organize trainings to your staff?
21. Do you wish to reach out to more international clients, expanding the company? Who do you see as your main target group in the future?

RELATIONS WITH OTHER COMPANIES/ORGANISATIONS

22. What kind of companies are you cooperating with?
23. Has EAS marketing activities influenced your company?

Appendix 2. Interview questions for tourism organisations' representatives

BASIC
1. For how long have you been active in tourism field?
2. What is your role in promoting, introducing and developing Estonian nature tourism on international markets?

EFFECTIVENESS OF MARKETING ESTONIAN NATURE TOURISM

3. How do you evaluate Estonia's nature tourism current situation? Is Estonia well known nature tourism destination? What trends can be encountered in the development of Estonian nature tourism?
4. What kind of marketing activities does your organization do to promote Estonia as a valuable nature tourism destination?
5. Have you measured the effectiveness of these marketing activities? How? Have these marketing activities increased international visits and buying nature tourism services?
6. What could be the main obstacles to reach foreign target groups?

EXPECTATIONS

7. What do foreigners expect from Estonian nature? Why do foreigners come to Estonia?

NATURE TOURISM COMPANIES

8. How do foreigners find Estonian NTCs? What channels are used?
9. Do foreign visitors also take nature tourism products/services through package holidays and how important this is?
10. What kind of factors are playing the biggest role in getting foreign clients?

COOPERATION

11. What kind of collaboration- partnerships there are and can you tell which ones are most effective regarding the sales to foreigners?
12. Are NTCs interested in cooperation with different associations, travel agencies? Does cooperation help to reach more foreign clients?

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