NORTH HUNT
SUSTAINABLE HUNTING TOURISM IN NORTHERN EUROPE

REPORT NO. 1: 2009

SALES ORGANIZATIONAL SURVEY

MAIN RESULTS

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Innovatively investing in Europe's Northern Periphery for a sustainable and prosperous future
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INTRODUCTION

This report contains results from a survey conducted among sales organisations which sell hunting tourism products. The aim of the survey was to define the marketing potential and future prospects of Northern hunting tourism.

Hunting tourism is considered to be an insufficiently utilised resource for rural and regional development. Objective information related to the marketing potential of hunting tourism and demand for sustainable practices in hunting tourism has been missing. This lack of information has partially restrained SMEs to access international markets and develop relationships with marketing agents. Therefore, the aim of this report is to provide objective information about the hunting tourism marketing potential.

The research results, presented in this report, are a part of the North Hunt project. North hunt is an international project that has been awarded funding by the European Regional Development Fund within the Northern Periphery Programme. North Hunt involves a partnership of ten organisations from Finland, Sweden, Iceland, Scotland and Canada. These are governmental agencies, research bodies and industry related organisations along with entrepreneurs in each of the countries. The overall objective of the North Hunt project is to support the development of sustainable hunting tourism that will diversify the economic activity of peripheral regions in Northern Europe. The results, presented in this report, were developed as part of work package 3 entitled; Objective information to support SME and operational environment development. The aim of work package 3 is to provide objective information on hunting tourism related to its economical sustainability (marketing and economical potential) and ecological sustainability (monitoring models). In addition, the aim is to establish relationships between sales organizations and SMEs. Therefore besides the sales organisation survey, research will also be focused on monitoring models and the economical potential of hunting tourism. These will not be addressed in this report. Information on the basics of hunting tourism as well as opportunities in the business is important for existing SMEs and start up companies to develop their business ideas or activities. The information, gathered in work package 3, is especially significant for them in order to develop their activities further.

In the following the methods and results of the survey are presented.

METHODS

This research was conducted through an online survey of 30 questions (and a number of sub-questions) focusing on marketing potential and future prospects of Northern hunting tourism among sales organisations selling hunting tourism products. The sales organisations were defined by the North Hunt partnership as tour operators, tourism organisations, travel agencies and/or others who sell hunting tourism products. Sales organisations were selected by the North Hunt partnership in close cooperation with hunting tourism companies associated with the North Hunt project.

The survey was designed in cooperation with the North Hunt partnership and associated hunting tourism companies in each of the participating countries. The preliminary focus of the survey was on the following themes:

- To whom the sales organisations are selling hunting tourism products
- What kind of products are they selling
- How are they selling (marketing arguments, methods, structures)

Most importantly, the survey results were to serve the needs of the SMEs. Sales organisations, located in the North Hunt countries (Finland, Sweden, Iceland, Scotland and Canada) and sales organisations not necessarily located in the North Hunt countries but are selling hunting experiences in one/some/all of the North Hunt countries were both included in the survey. Therefore, the survey could both focus on domestic and foreign markets.

A total of 59 sales organisations were selected by the partnership and reviewed. After checking these sales organisations, it was decided that 21 of these organisations should not be included in the survey since they did not meet the criteria. Some were not in the business of selling hunting tourism products, some were not in operation etc. A total of 38 sales organisations got the survey sent to them by e-mail in May 2009. After a few days the e-mail was followed up by a telephone call to encourage them to participate in the survey. In total 24 sales organisations answered the survey and 14 did not (see Figure 1). This gives a response rate of 63,2%.

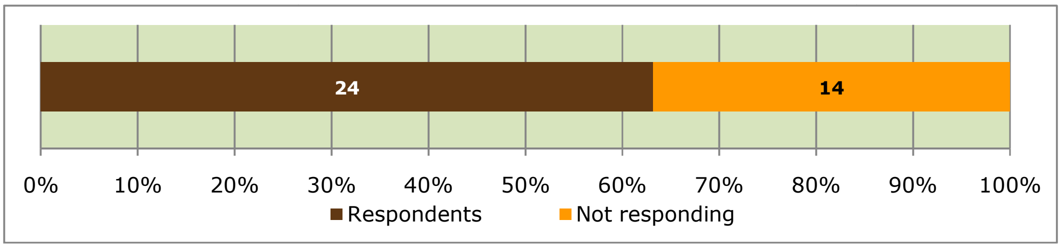


Figure 1. Response rate

Results

In the following the results of the survey are presented question by question. The chapter is divided into four subchapters depending on the themes from the survey. These are:

- Basic information
- The sales of hunting tourism products
- Marketing arguments, methods and structures
- Product development

The questions from each of these subsections form the headlines.

Basic information

In which country does your organization operate?

The organisations in this survey operate all over the world. Most of them operate in Germany (35%) and Scandinavian countries (23%). One mentioned that his company operates all over the world except in Scandinavia.

To what countries do you sell hunting?

The sales organisations were asked to list the countries to where they sell hunting experiences and which game they focus on. Six organisations replied that they sell hunting worldwide, six of them all around Europe (without specifying any countries within Europe) and only three in Scandinavian countries. Big game and small game was mentioned but species were not always specified as can be seen in table 1.

Table 1. To what countries to you sell hunting (including game offered)

Country	No. of organizations	Game offered
Worldwide	6	Big Game, small game, antelopes, deer, goose
All around Europe	6	Big Game, small game, deer, goose, duck
Scandinavia	3	Big Game, small game, goose
Denmark	3	Small game
Germany	3	All kinds of game
Sweden	3	Big Game
Austria	2	All kinds of game
Canada	2	Big Game
England	2	Deer, pigeons
Iceland	2	Reindeer, goose
Norway	2	Big game, small game
USA	2	Big game
Alaska	1	Big game
Botswana	1	Big game
France	1	All kind of games
Ireland	1	Deer
Italy	1	All kind of games
Mexico	1	All kind of games
Namibia	1	Antelopes
South Africa	1	Antelopes
Tanzania	1	Big game
Tunisia	1	Wild Boar

Where do the majority of your customers come from?

The sales organisations were asked to name the top three nationalities of their customers in order to identify their markets. Table 2 shows this division. 11 sales organisations listed Germans as their top customer group and 5 sales organisations listed Americans as their top customer group.

Table 2. Where do the majority of your customers come from?

Country	First place	Second place	Third place
Germany	11	0	0
USA	5	0	0
Sweden	3	2	3
Denmark	3	0	3
UK	1	0	3
Spain	1	1	0
Austria	0	8	0
Norway	0	3	0
Russia	0	2	1
Italy	0	1	0
Hungary	0	0	1

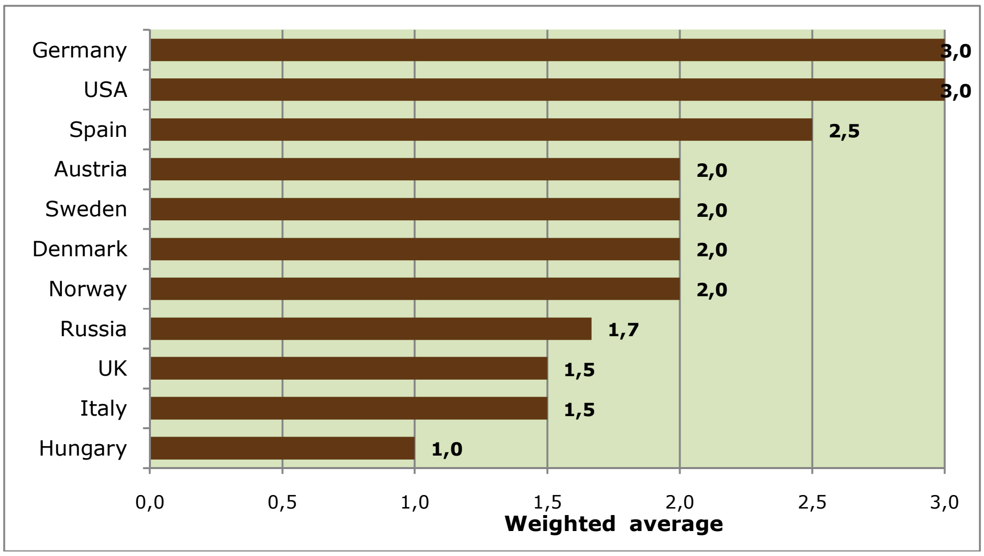


Figure 2. Where do the majority of your customers come from, weighted average score

For how long has your organization been selling products related to hunting tourism?

46% of the participating sales organisations have sold hunting tourism products for 10 years or less. 29% have sold hunting tourism products for more than 20 years.

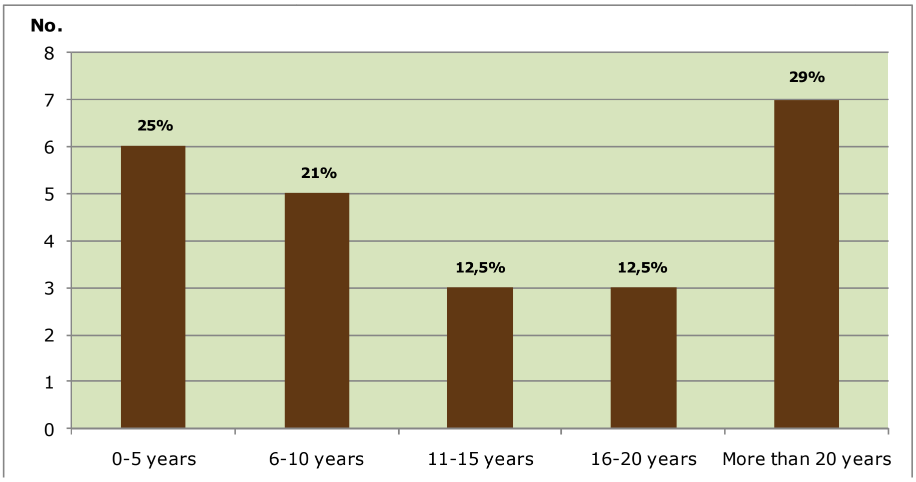


Figure 3. For how long has your organization been selling products related to hunting tourism?

WHICH OF THE FOLLOWING POSES MAJOR CHALLENGES FOR THE MARKETING OF HUNTING TOURISM, IN YOUR OPINION?

In order to identify challenges for the marketing of hunting tourism, the sales organisations were asked to rank from 1-3 different challenges, with 1 being the biggest challenge, 2 being the second biggest challenge and so on. Figure 4 shows the range of the responses and the ranks. When the weighted average is considered (figure 5), it can be seen, that according to the participating sales organisations regulation and higher travel costs pose the biggest challenges for the marketing of hunting tourism. Competition and quota for game were also considered to pose a marketing challenge. One of the participating sales organisations mentioned the "overall meltdown of the economy" as a challenge.

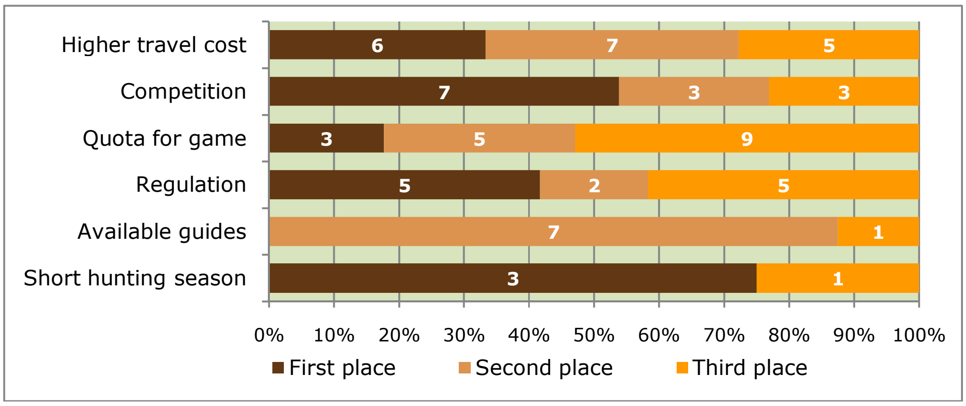


Figure 4. Which of these options poses major challenges for the marketing of hunting tourism?

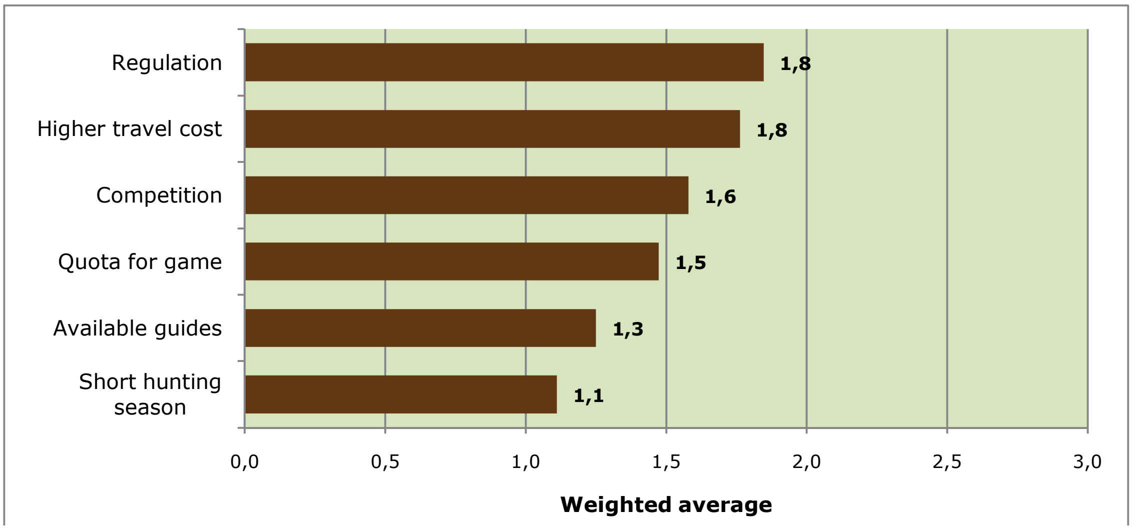


Figure 5. Which of these options pose major challenges for the marketing of tourism, weighted average score

Is your company detecting increased or decreased demand for hunting tourism?

50% of the participating sales organisations have detected an increasing demand for hunting tourism. 29% have not detected any difference in demand and 21% have detected a decrease.

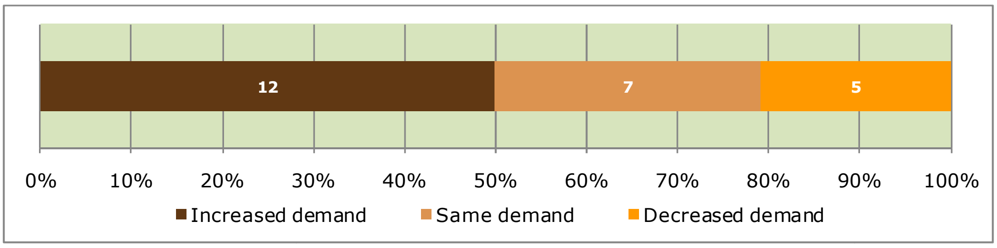


Figure 6. Is your company detecting increased or decreased demand for hunting tourism?

What kind of hunting products does your organization offer?

The participating sales organisations were asked to describe what kind of hunting tourism product they offered to their customers. Trophy hunting was the most popular product as can be seen in figure 7. 25% of the sales organisations claimed mixed adventures to be their most popular hunting product. Small game hunting was the least popular product with only 8%.

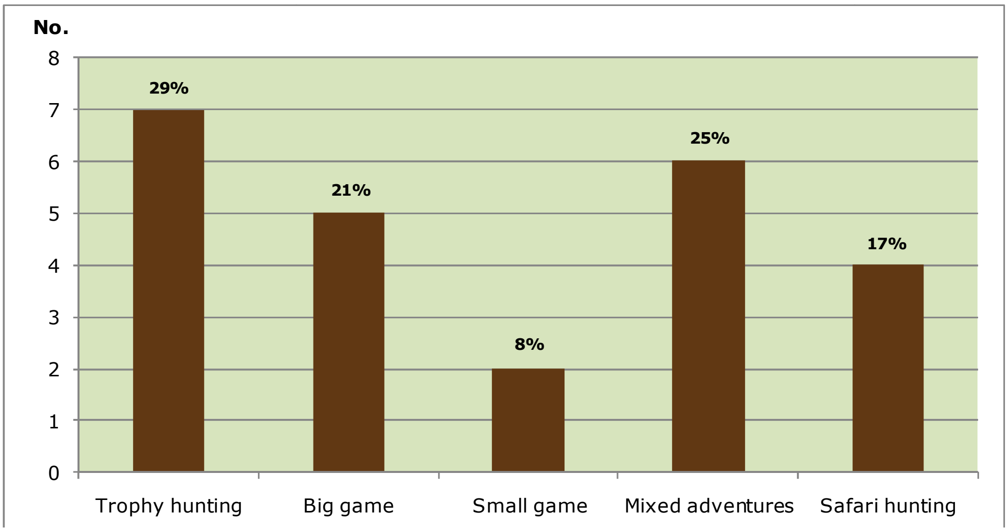


Figure 7. What kind of hunting products does your organization offer?

DOES YOUR ORGANIZATION DETECT INCREASED DEMAND IN ANY PARTICULAR GAME?

Despite 50% of the participating sales organisations detecting an increased demand for hunting tourism (see figure 6), most of them did not detect an increased demand in any particular game for hunting. 67% of the sales organisations answered this question with a "no". Of those 33% that answered this question with a "yes" 37,5% detected an increased demand for wild boar hunting (see figure 9). 25% detected an increase in demand for safari hunting and low cost hunting. A small increase in demand was detected in small game hunting.

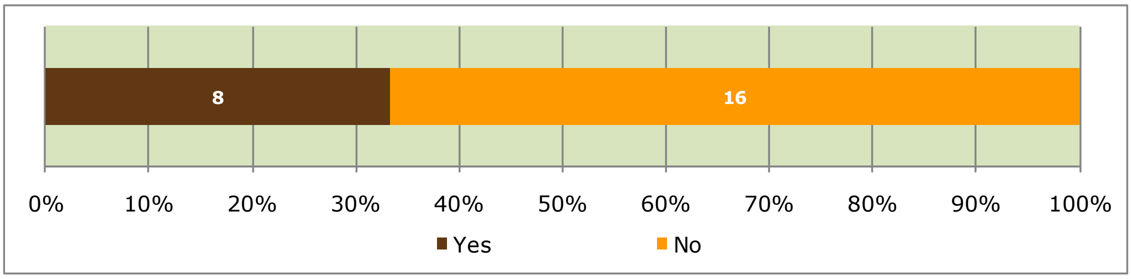


Figure 8. Does your organization detect increased demand in any particular game?

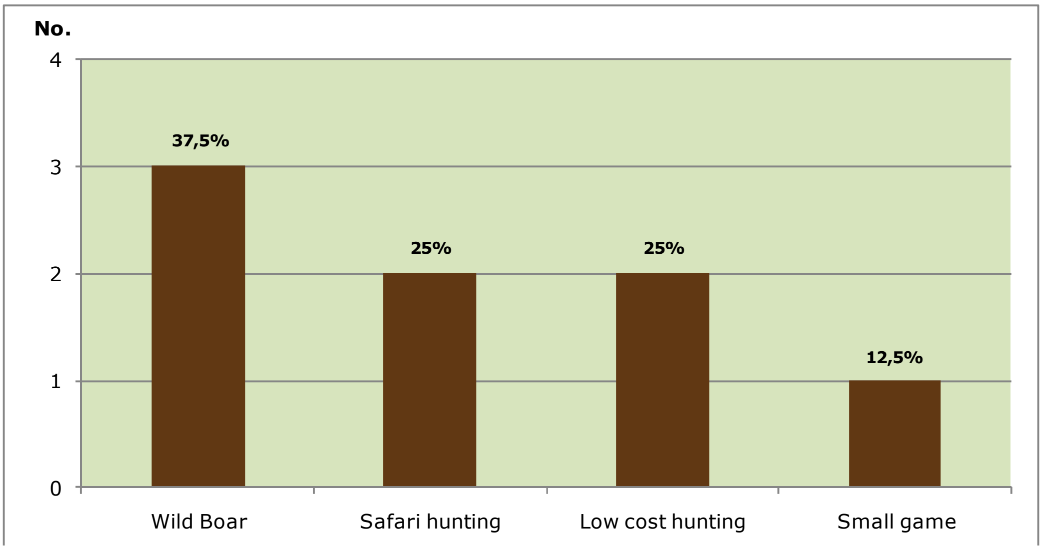


Figure 9. In which game does your organization detect increased demand?

DO YOU SELL OTHER ACTIVITIES WITH HUNTING TOURISM PACKAGES?

58% of the participating sales organisations sell other activities with their hunting tourism packages and 42% don't.

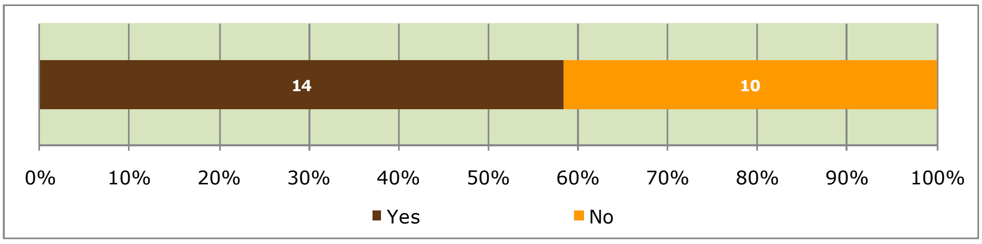


Figure 10. Do you sell other activities with hunting tourism packages?

WHAT ACTIVITIES DO YOU SELL WITH HUNTING PACKAGES?

The participating sales organisations were asked to list which other activities they sold with their hunting tourism packages. Sightseeing and fishing were the most common answers but other activities like golf, boating, snowmobiling and photography were also mentioned.

THE SALES OF HUNTING TOURISM PRODUCTS

ESTIMATE HOW MANY HUNTING PACKAGES YOUR ORGANIZATION SOLD IN 2008

The range of answers for this question was extremely large. There was one company which had sold only 7 hunting packages and one company which had sold approximately 5000. The average was 976 hunting packages but the median was 300 hunting packages.

HOW MANY PERCENTAGES OF THE CUSTOMERS IN 2008 WERE WOMEN?

According to the answers from this question, women are not the biggest customer group of the sales organisations. 87,5% of the sales organisations answered that the percentage of female customers in 2008 was less than 20% (see figure 11). No sales organisation answered that the percentage of female customers in 2008 was over 40%. From these numbers, it can be estimated that the majority of the sales organisations' customers in 2008 were men.

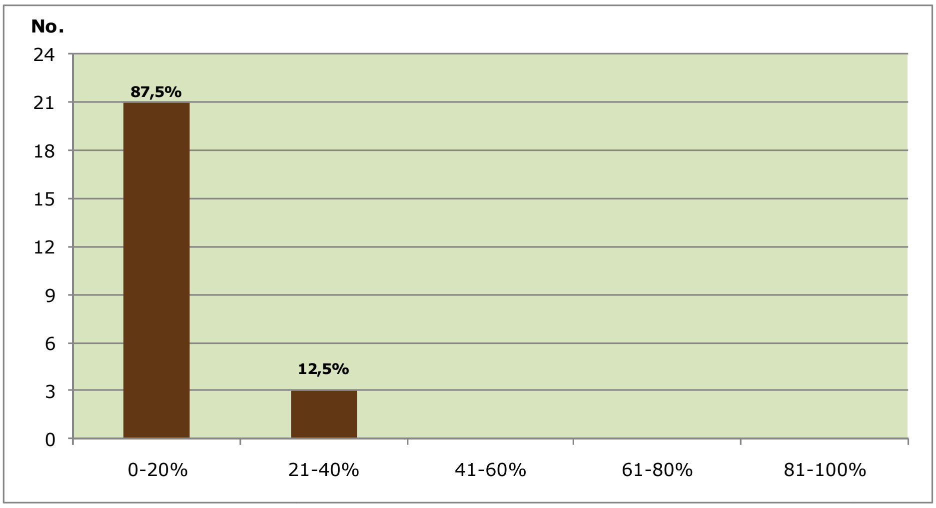


Figure 11. How many percentages of the customers in 2008 were women?

WHAT IS THE AVERAGE LENGTH, IN OVERNIGHTS, OF HUNTING TRIPS THAT YOUR ORGANIZATION OFFERS?

The sales organisations were asked to estimate the average length in overnights of hunting trips they offered. 99% of the sales organisations answered that the average length in overnights was 5 nights or more. 45% of the sales organisations answered that the average length in overnights was 5 nights.

WHAT WAS YOUR LEAST EXPENSIVE HUNTING TOURISM PRODUCT IN 2008?

The least expensive hunting tourism product was goose hunting or pheasant hunting for 500 Euros and deer hunting for 700 Euros. The price range for the most expensive hunting tourism products was from 500 Euros up to 12.000 Euros for big game. One sales organisation chose not to answer this question since the price depended on the game, the country and the duration of the trip.

TO WHOM DO YOU SELL YOUR HUNTING TOURISM PRODUCTS?

Four customer groups were defined beforehand and asked about with the possibilities "mostly sold to", "sold to some" and "hardly sold to any". The customer groups were individuals, groups, business clients and families. The range of answers can be seen in figure 12 and the weighted average in figure 13. The sales organisations mostly sold their hunting tourism products to individuals (weigh average 2,7). Groups were the second biggest customer group, then business clients and lastly families.

It should be taken into consideration that there is a possible overlap between the customer groups. E.g. business clients could also be considered as a group and so could families.

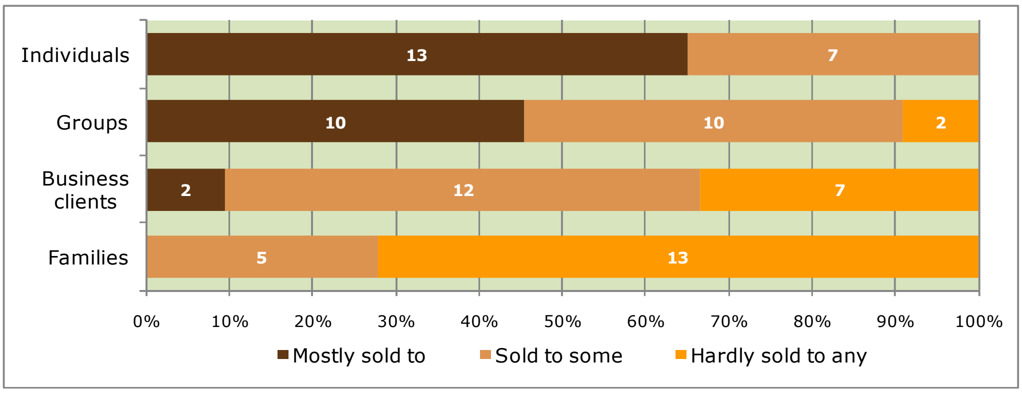


Figure 12. To whom do you sell your hunting tourism products?

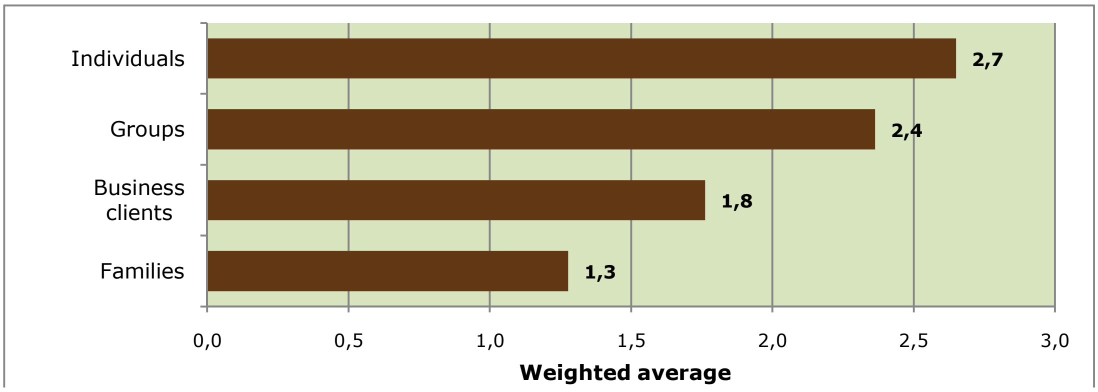


Figure 13. To whom do you sell your hunting tourism products, weighted average score

NAME THE TOP THREE PRODUCTS THAT YOUR CUSTOMERS ASK FOR

This was an open question and the sales organisations could fill in their own answers for what top three products their customers asked for. The answers were many and different. Examples are given in the points below:

First place:

- Wild Boar
- Reindeer
- Buffalo Hunt

Second place:

- Antelopes
- Goose
- Reliable hunting

Third place:

- Roe Buck
- Ptarmigan
- Correct information

One sales organisation reported that "reliable hunting" is one of the products that are often asked for by customers. It is not possible to know for sure what is meant by "reliable". Possible explanations could be e.g. that it involves a guaranteed bag or maybe safety during the hunting experience, responsible hunting or the customer would get his/her money's worth.

Another company reported that "correct information" is asked for by customers. This could indicate that reliable information is important to the customer, which could be why this is asked for by the customers. What is meant by "reliable information" is not clear from the answer in the survey.

In your opinion, is there demand for the following products?

The sales organisations were asked to evaluate whether customers demand different kinds of hunting tourism products (in total 17 products) that are available in the North Hunt countries. The products and the sales organisations' evaluations can be seen in figure 14 below. According to the evaluation of the sales organisations there is a definite demand for brown bear, goose and North European moose. There is also a demand for black grouse, wild forest reindeer, ducks, capercaillie and reindeer. According to the sales organisations there is a lesser demand for hazel-hen, mink, hare and beaver hunting.

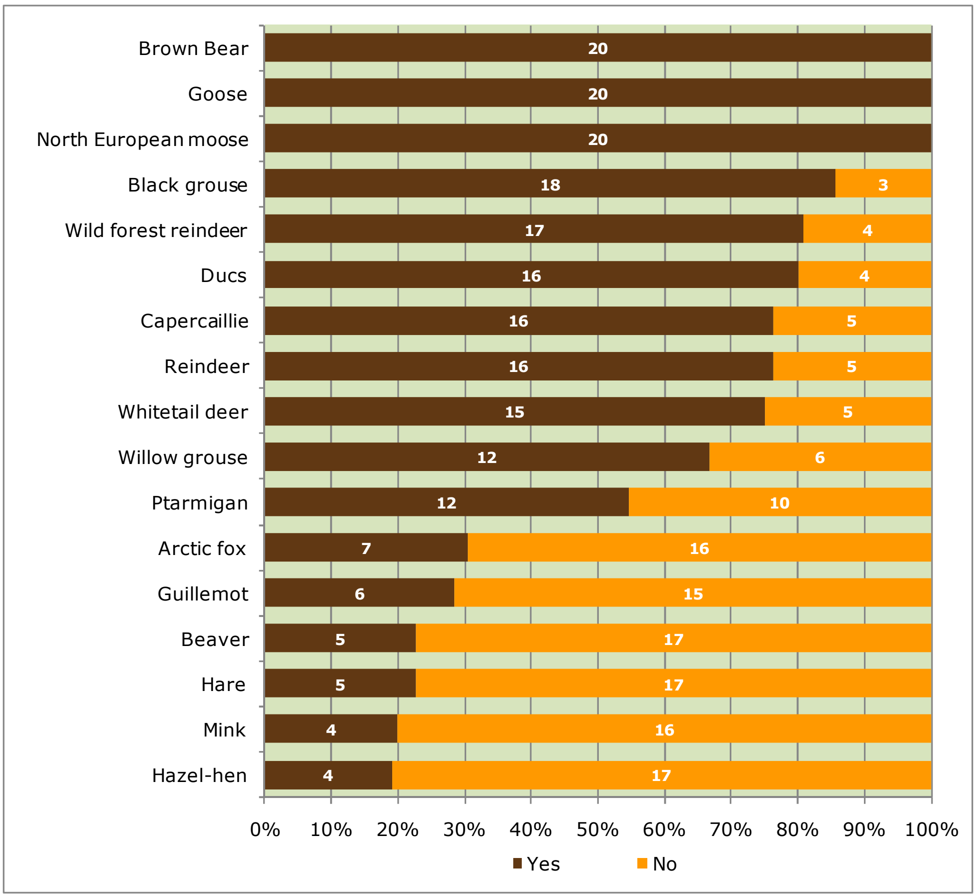


Figure 14. In your opinion, is there demand for these products?

The sales organisations were also given the opportunity to mention other hunting tourism products than mentioned in figure 14 above. Only a handful of sales organisations mentioned the following species: Musk Ox, Polar Bear, Black bear, red stag, all African game, Wild Boar, Roe Deer, Wolf and Cougar.

MARKETING ARGUMENTS, METHODS AND STRUCTURES

WHICH OF THE FOLLOWING TOOLS HAVE GIVEN THE BEST RESULTS IN MARKETING HUNTING TOURISM?

The sales organisations were asked to evaluate which tools have given the best results in their marketing of hunting tourism. A number of marketing tools were listed up and the sales organisations were asked to rank the tools from 1-3 with 1 giving the best results, 2 giving the second best results and so on. Figure 15 shows the weighted average of the marketing tools that have given the best results. According to the sales organisations general exhibitions tend to give the best results followed closely by word of mouth. Magazines give the third best results. TV commercials, radio and brochures were not rated by any of the sales organisations, which puts them at the bottom of the list.

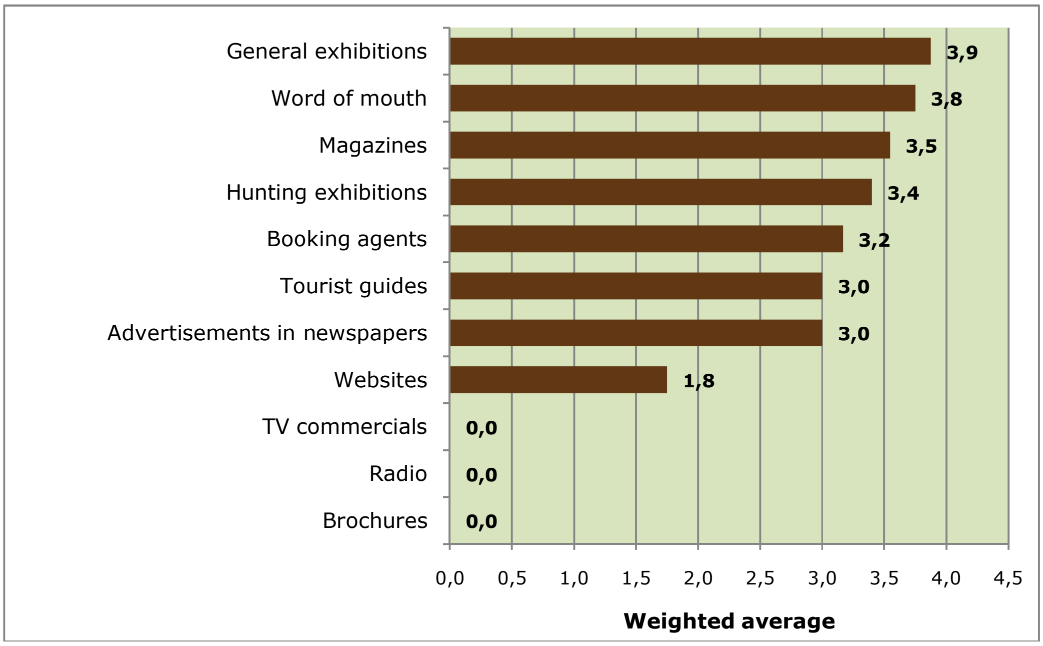


Figure 15. Which of the following tools have given the best results in marketing hunting tourism, weighted average score

The sales organisations were also given the opportunity to mention other marketing tools than mentioned in figure 15 above. Three sales organisations used this opportunity and mentioned fairs and shows, that would fall under the category of general exhibitions. Three sales organisations had not used any marketing methods/tools at all.

WHICH PROPORTION (%) OF THE TOTAL TURNOVER DID YOUR ORGANIZATION SPEND IN MARKETING HUNTING?

50% of the sales organisations estimated that they spend approximately 10-15% of their total turnover in marketing their hunting tourism products.

DOES YOUR ORGANIZATION COOPERATE WITH OTHER PARTIES IN THE TOURISM SECTOR?

According to the answers from the survey, 75% of the sales organisations cooperate with other parties in the tourism sector. Those who answered "yes" were asked to specify with whom they cooperated. These were mostly tourism associations, booking agents and travel agents but hunting shops were also mentioned.

15% of the sales organisations said that they did not cooperate with other parties. Those who answered "no" were asked why they didn't cooperate with other parties in the tourism sector. Some sales organisations wrote their explanations. Examples are:

- "Why should I? I have enough connections."
- "I don't need to."
- "We cover everything."

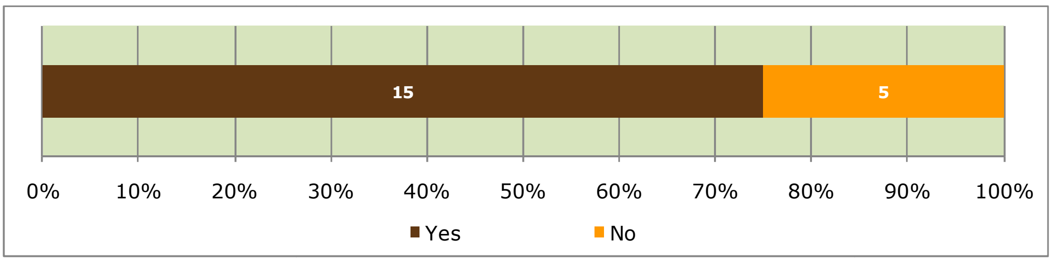
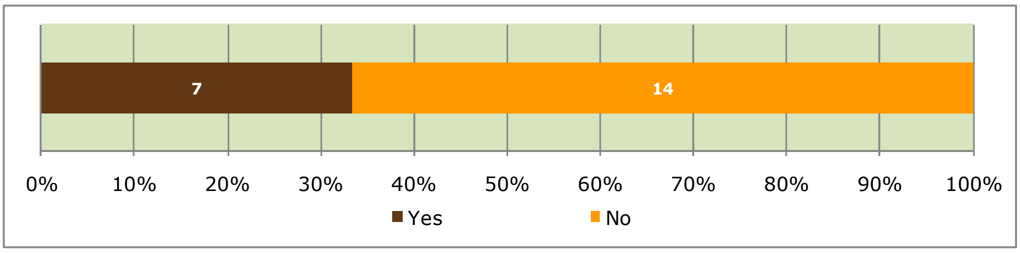


Figure 16. Does your organization cooperate with other parties in the tourism sector?

IS YOUR ORGANIZATION CURRENTLY AFFILIATED WITH ANY PROFESSIONAL HUNTING TOURISM ASSOCIATION?

Only 33% of the participating sales organisations are affiliated with a professional hunting tourism association and 67% are not. Those 33% of the participating organisations answered the question with a "yes" were asked with which association they were affiliated. Two sales organisations wrote that they were affiliated with Safari Club International.



DOES YOUR ORGANIZATION SEE ANY GAIN IN JOINING INTERNATIONAL COOPERATION ON HUNTING TOURISM?

67% of the participating sales organisations did see a gain in joining an international cooperation on hunting tourism. The sales organisations were asked to give their explanations for what gain they saw in joining. The most common explanation was that an international cooperation would bring more clients and more business. One sales organisation explained that international cooperation would bring better understanding of foreign markets, receive better purchase conditions and would give reliable contacts. Another sales organisation saw the advantage of network. Another explained that there were many common issues that are a threat to hunting industries.

33% of the participating sales organisations did not see a gain in joining an international cooperation on hunting tourism. These, too, were asked to explain their choice of answer. One sales organisation wrote that there were too many operators who do not take their task seriously enough. Another wrote that they were very protective of their good name and fear jeopardizing it. A third one asked: "Why should we?"

IN YOUR OPINION ARE THERE ANY UNEXPLOITED OPPORTUNITIES REGARDING HUNTING TOURISM?

The sales organisations were asked whether they saw any unexploited opportunities regarding hunting tourism. This was an open-ended question so the sales organisations could have the opportunity to write what they wanted. 47% wrote that they did see unexploited opportunities. One sales organisation wrote "We are always looking for new ideas" and another wrote "Where can I start? So many". 41% wrote that they didn't really see any unexploited opportunities and 12% wrote both yes and no. Two of the sales organisations wrote that they were not interested.

DO YOU THINK YOU COULD SELL SOME OF YOUR CURRENT PRODUCTS TO A NEW CLIENT BASE?

64% of the sales organisations believe that they could sell some of their current products to a new client base (see figure 17). 36% wrote that they did not think they could sell some of their current products to a new client base. The sales organisations were asked to specify their answers if they could. One sales organisation that wrote "no" explained that a hunter is a hunter regardless of other things. Another sales organisation that wrote "no" explained that they already serve hunters in Europe and another that wrote "no" explained that they cover all so there was no need for thinking about a new client base.

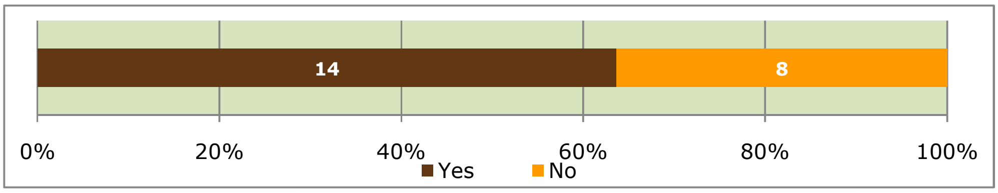


Figure 17. Do you think you could sell some of your current products to a new client base?

PRODUCT DEVELOPMENT

WHAT NEW TRENDS (HUNTING AND TRAVEL) DO YOU EXPECT IN THE FUTURE?

The sales organisations were given the opportunity to predict the future in hunting and travel and describe what new trends they expected. Three basic trends could be identified from their answers. Firstly, that hunting would increasingly involve the family. 45% of the sales organisations wrote about families. Secondly, hunting would become more nature based (25%) and thirdly, less expensive hunting trips would emerge (13%). One of the sales organisations explained that the price range would change and wrote that hunting will go more into the cheaper offers and into the more exclusive offers, medium priced hunting products were not so interesting anymore. One sales organisation predicted that sales would drop in the next 2 years due to the international crisis.

DO YOU AGREE OR DISAGREE TO THE FOLLOWING STATEMENT: CANADA, FINLAND, ICELAND, SCOTLAND AND SWEDEN ARE SAFE AND RELIABLE DESTINATIONS FOR HUNTING TOURISM.

The sales organisations were asked to give their opinions on a few statements regarding hunting tourism in the North Hunt countries. On the first statement, about the North Hunt countries being safe and reliable destinations for hunting tourism, all of the countries received positive feedback from the sales organisations (see figure 18). When the weighted average is considered (see figure 19), Iceland gets the highest score (4,7) from the sales organisations, followed closely by Canada and Scotland (4,6 each). Sweden and Finland get 9% of the sales organisations disagreeing with the statement for each of those two countries.

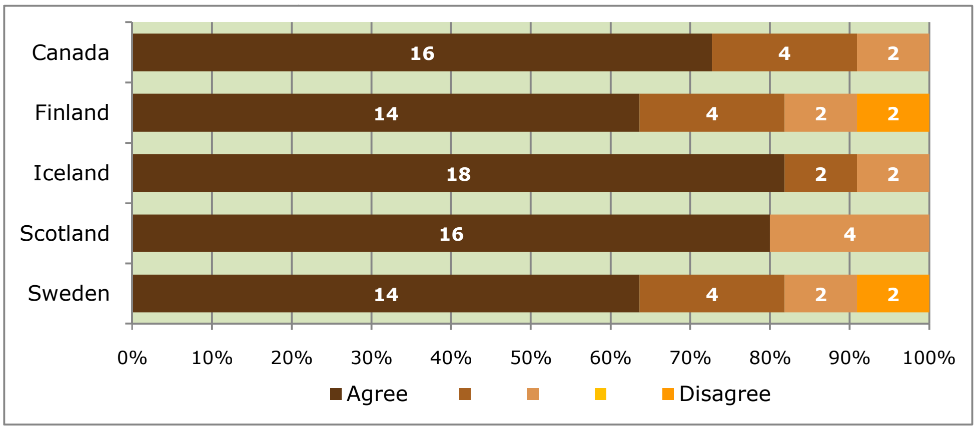


Figure 18. Canada, Finland, Iceland, Scotland and Sweden are safe and reliable destinations for hunting tourism.

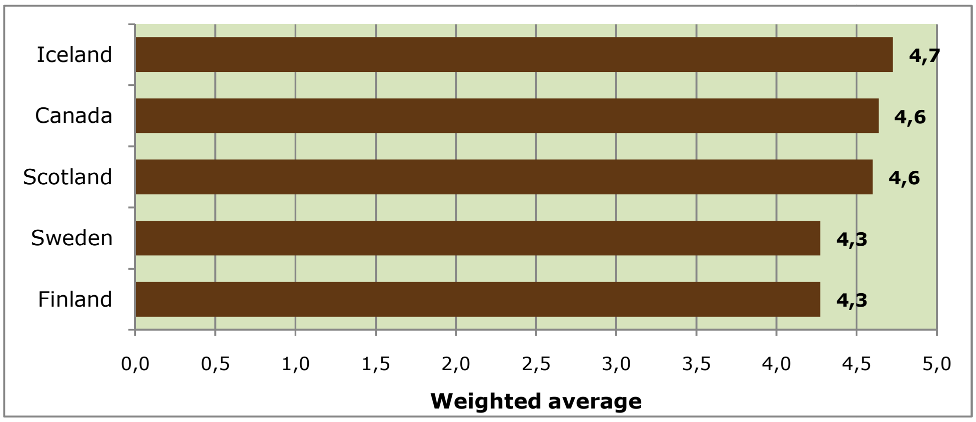


Figure 19. Canada, Finland, Iceland, Scotland and Sweden are safe and reliable destinations for hunting tourism, weighted average.

Do you agree or disagree to the following statement? Canada, Finland, Iceland, Scotland and Sweden are important markets for hunting tourism in the future

The next statement was whether the North Hunt countries were considered important markets for future hunting tourism. 73% of the sales organisations agree with the statement in the case of Canada. 43% agree with the statement in the case of Scotland. When the weighted average is considered, these two countries have the highest score among the sales organisations. Iceland and Finland get the lowest ratings from the sales organisations. In the case of these two countries, 18% of the sales organisations disagree with the statement.

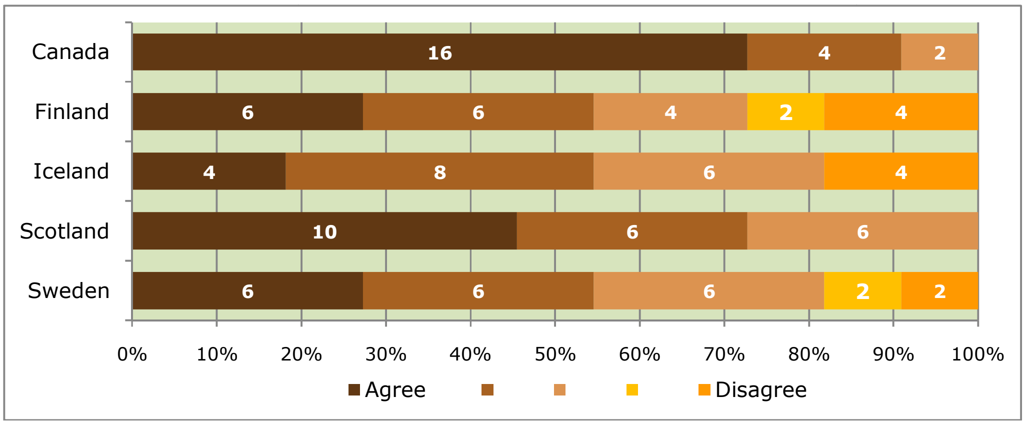


Figure 20. Canada, Finland, Iceland, Scotland and Sweden are important markets for hunting tourism in the future.

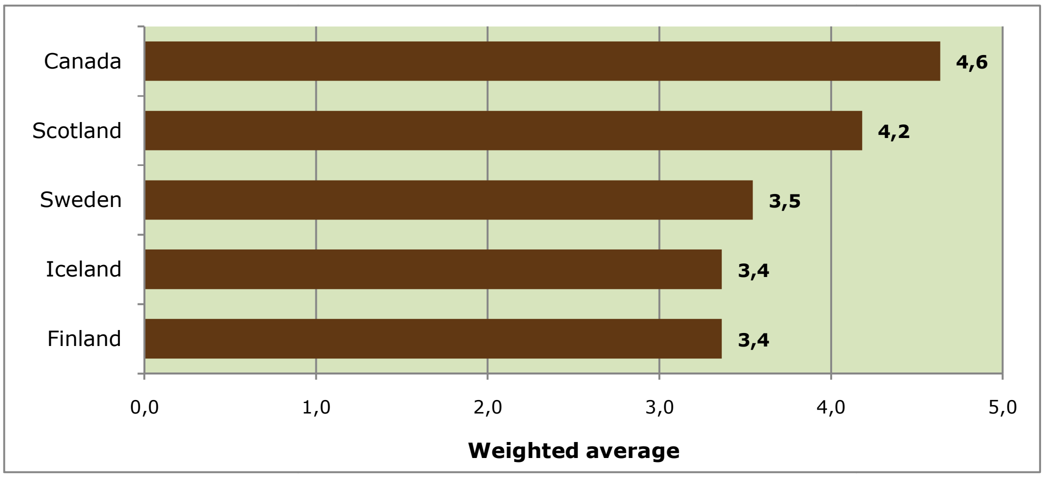


Figure 21. Canada, Finland, Iceland, Scotland and Sweden are important markets for hunting tourism in the future, weighted average.

DO YOU AGREE OR DISAGREE TO THE FOLLOWING STATEMENT? CANADA, FINLAND, ICELAND, SCOTLAND AND SWEDEN PROVIDE SATISFYING HUNTING TOURISM PRODUCTS TODAY.

The last statement, the sales organisations were asked to evaluate, was about whether the North Hunt countries provided satisfying hunting tourism products today. Again, Canada had the highest score. 89% of the sales organisation agreed with the statement about Canada. When the weighted average is considered, Scotland gets the second highest score followed by Finland. Iceland gets the lowest ratings. 20% of the sales organisations disagree with the statement in the case of Iceland.

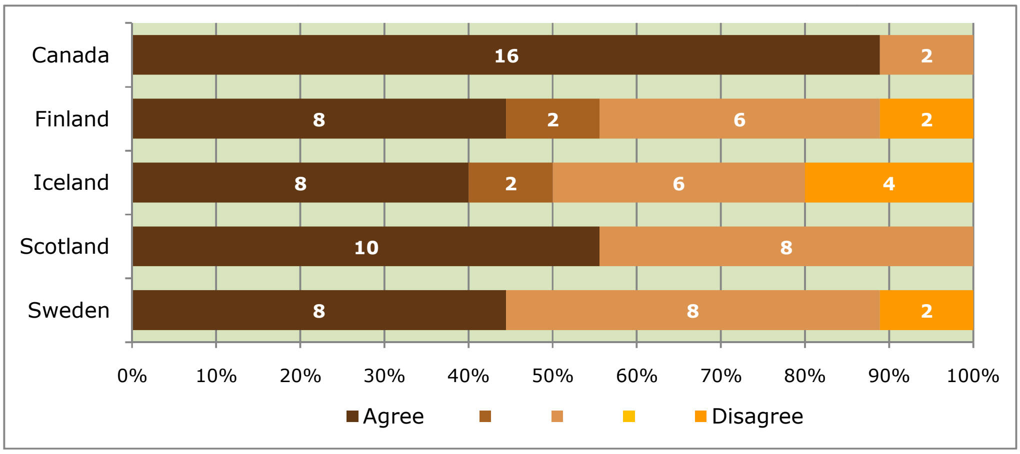


Figure 22. Canada, Finland, Iceland, Scotland and Sweden provide satisfying hunting tourism products today.

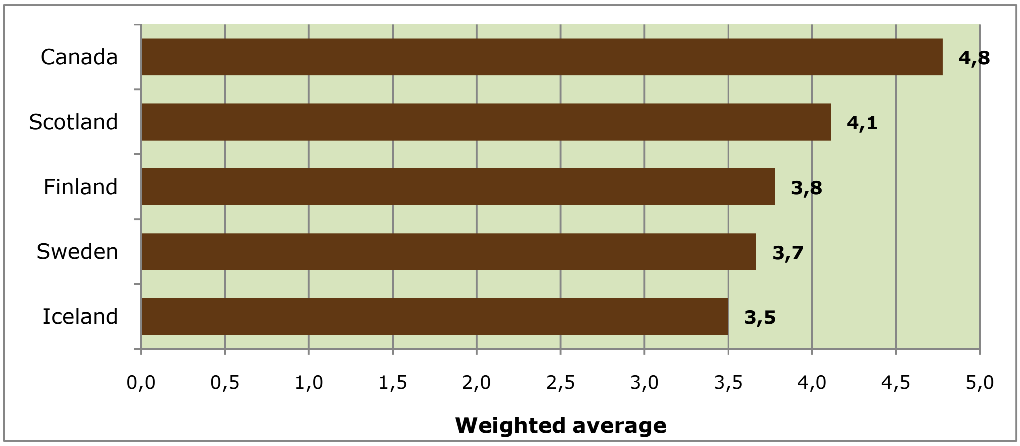


Figure 23. Canada, Finland, Iceland, Scotland and Sweden provide satisfying hunting tourism products today, weighted average.

Are there any hunting tourism products from Canada, Finland, Iceland, Scotland and Sweden that are missing in your opinion?

80% of the sales organisations did not think that there were any hunting tourism products from the North Hunt countries that were missing. Those who did think that there was something missing were asked to specify their answer. Most of the specifications involved lack of knowledge. Three sales organisations wrote that they knew very little about the products from these countries. One wrote that the general public was not informed about these destinations.

Are your clients interested in new hunting tourism products in Canada, Finland, Iceland, Scotland or Sweden in your opinion?

60% of the sales organisations did not think their clients were interested in new hunting tourism products in the North Hunt countries. The sales organisations were asked to specify their answer. Most of these sales organisations, wrote either that they offer every available species already or that these countries had nothing more to offer. One sales organisation wrote that Canada and Scotland were already well developed in terms of hunting tourism products and that the game populations in the other mentioned countries could not support larger harvesting than the local hunters take.

40% of the sales organisations did think that their clients were interested in new products, and they were also asked to specify their answer, preferably by stating the species and which country. Most of them wrote “all kinds of species” and “every country”. One sales organisation wrote especially Scotland and Scandinavia.

Do you agree or disagree with the following statements regarding how your organization finds new products

In the last question of the survey, the sales organisations were asked to consider 9 statements in regards to how they found new products (see figures 24 and 25). 80% of the sales organisations agreed with the statement: “we actively seek new products to sell”. 50% of the sales organisations agreed with the statement “we collaborate with local entrepreneurs”. Collaboration with international agents also had a high score, according to figure 25. Collaboration with regional agents and collaboration with national entrepreneurs received the lowest score.

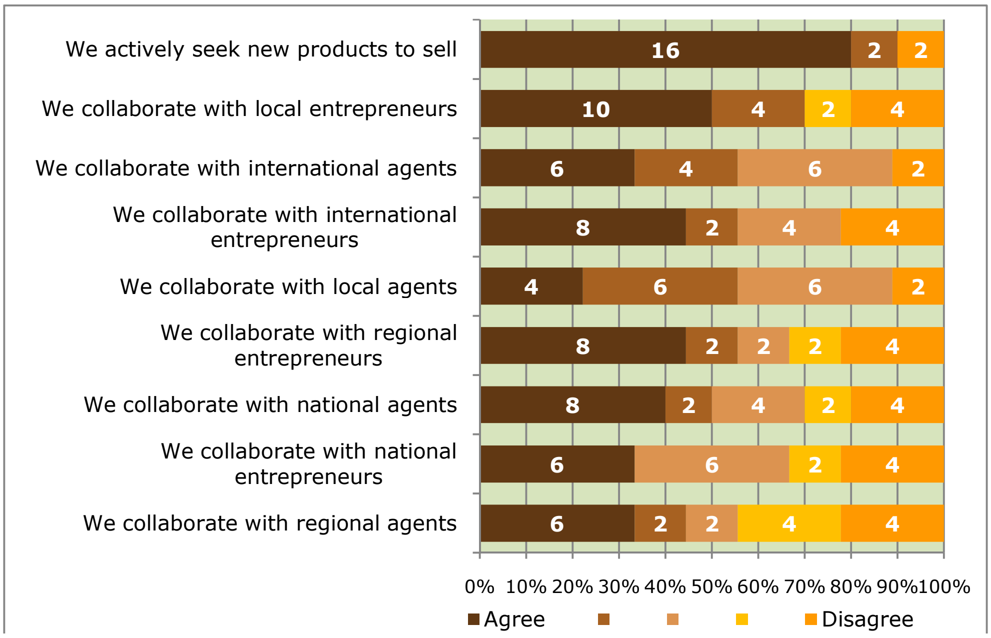


Figure 24. Do you agree or disagree with these statements regarding how your organisation finds new products

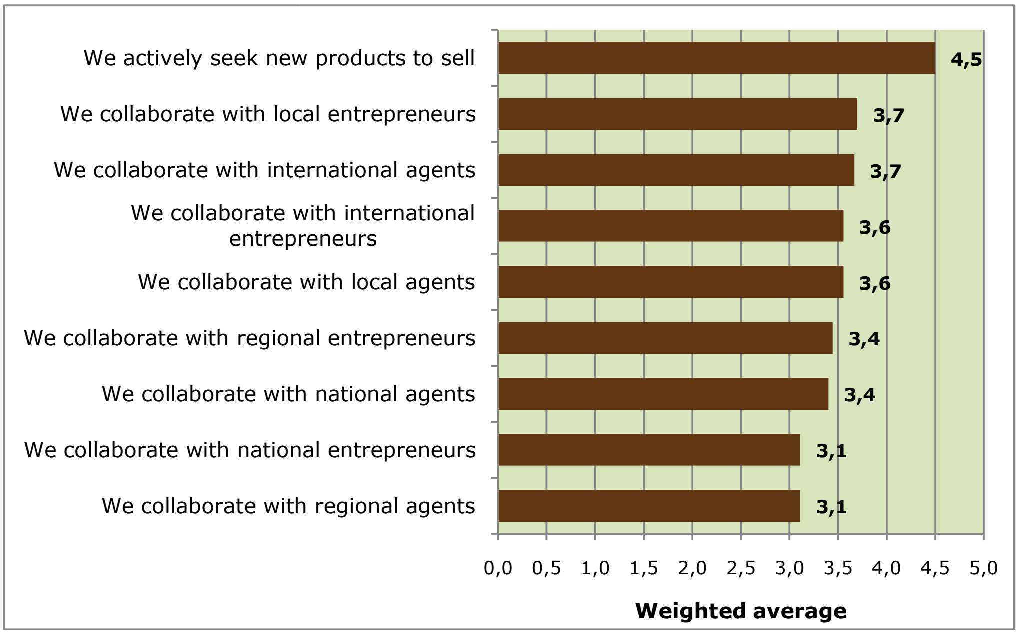


Figure 25. Do you agree or disagree with these statements regarding how your organisation finds new products, weighted average

CONCLUSION

In this report the results from an online survey conducted among sales organisations which sell hunting tourism products have been presented. The aim of the survey was to define the marketing potential and future prospects of hunting tourism in Northern Europe. The survey contained 30 questions. The sales organisations were defined by the North Hunt partnership as tour operators, tourism organisations, travel agencies and/or other who sell hunting tourism products. The survey had four themes and the conclusions are presented for each of those themes:

Basic information: The participating sales organisations operated all over the world, but were mostly based in Germany and Scandinavian countries. Most of them sold hunting tourism products world-wide or all around Europe. In Scandinavia, big game, small game and goose hunting was offered. Germans and Americans were identified as the sales organisations' biggest customer groups.

According to the sales organisations, trophy hunting was considered to be the most popular hunting product they offered. Mixed adventures were also popular. The sales organisations have detected an increasing demand for hunting tourism. The sales organisations have detected an increasing demand for wild boar hunting, safari hunting and low cost hunting. Regulation and higher travel costs were identified by the sales organisations as the biggest challenges for the marketing of hunting tourism.

The sales of hunting tourism products: According to the sales organisations men are the biggest customer group. For most of the sales organisations the percentage of female customers in 2008 was less than 20%. The most common average length in overnights of hunting trips was 5 nights or more. Hunting tourism products were mostly sold to individuals.

The sales organisations' customers ask for different kinds of products e.g. wild boar, reindeer and buffalo hunt. Reliable hunting and correct information was also demanded by customers. There is a demand for brown bear, goose and moose hunting. There is also demand for black grouse, reindeer, ducks and capercaillie.

Marketing arguments, methods and structures: According to the sales organisations general exhibitions as a marketing tool for hunting tourism products tend to give the best results followed closely by word of mouth. Most of the sales organisations cooperate with other parties in the tourism sector. These were mostly tourism associations, booking agents and travel agents. Most of the sales organisations did see a gain in joining an international cooperation on hunting tourism since it would bring more clients and more business. Most of the sales organisations believe that they could sell some of their current products to a new client base.

Product development: Three future trends in hunting and travel were identified by the sales organisations. These were that hunting would increasingly involve the family, hunting would become more nature based and less expensive albeit with growing disparity between prices offered. The sales organisations generally thought the North Hunt countries offered satisfying hunting tourism products and these were safe and reliable destinations for hunting tourism. The sales organisations saw Canada and Scotland as important markets for hunting tourism in the future, but Iceland and Finland to a lesser extent.

Most of the sales organisations wrote that they actively seek new products to sell. The majority of the sales organisations did not think that there were any hunting tourism products from the North Hunt countries that were missing. They also did not think that their clients were interested in new hunting tourism products in the North Hunt countries. The reasons given by the sales organisations were mainly that they either offered every available species already or that these countries had nothing more to offer. However, there were sales organisations who specified that they knew very little about the products from these countries. This gives reason to believe that there are possibilities for informing the sales organisations better about the products available in the North Hunt countries.