

Comparative Study in Digital Marketing Trends in Adventure Tourism: Bulgaria, Estonia, Ireland and Scotland

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Abstract

Adventure tourism is one of the fastest growing segments of the tourism industry and has been recognized as a powerful tool that can promote sustainable development in rural and economically marginal areas, generating smart employment and jobs growth, as well as providing strong incentives for conserving the natural environment. Adventure tourism services are getting more popular in Europe in recent years, and with the abundance of tourism organizations, adventure types and destinations, successful marketing strategy is key for attracting new customers to the niche service. With the worldwide digitalization trend the main channels for information on different and alternative types of tourism in recent years have been the different digital communication platforms (social media, website, e-mail and e-WOM marketing). The balanced online presence of the organization is an extremely valuable tool, especially if the target audience is young and active people looking for new opportunities. Unlike classic media communication tools, digital communications are extremely effective on the basis of much more limited resources. Therefore, for organizations offering a niche service, such as adventure tourism, the need for adopting digital communication channels is key for its market success. The survey, presented in the current paper, has been conducted with stakeholders in four different countries in Europe: Bulgaria, Estonia, Ireland and Scotland, and aims to establish the existing skill levels in digital marketing of adventure tourism organizations, as well as the opportunities for educational courses in the field of digital communication. Results are compared and analysed, in order to outline the current trends and opportunities for the stakeholders currently on the market, but also for those, looking for new tourism service opportunities.

Keywords: digital marketing, adventure tourism, digital marketing skills, social media marketing.

JEL classification: M31, L83.

1. Introduction

The digital marketing environment is changing rapidly, and, for small and medium enterprises, digital marketing is currently an important opportunity and even a necessity. Attracting new customers, engaging their interest and evoking participation, retaining existing customers and knowing their preferences are key steps towards building strong customer relationships.

Adventure tourism on the other hand is one of the fastest growing sectors of the tourism sector, attracting high value customers, supporting local economies, and encouraging sustainable practices. Thus, the continued growth of this sector creates positive impact not only for tourism, but also for destination economies, their people, and their environment. The industry includes wide variety of services and destinations for specific target groups. When it comes to promotion of such niche services, the traditional marketing tools prove to be ineffective, time consuming and of high financial cost. Presence in the digital world is a definite must for these organizations, considering the main target audience, which tend to be young and active tourists, looking for new experiences, actively using online information sources and also willingly sharing their experience with other like-minded people. The current paper focuses on the expertise and opportunities for implementation of digital marketing tools before such tourism organizations.

2. Opportunities and communication tools in the era of digital marketing

The term “digital marketing” describes targeted, measurable and interactive forms of marketing

communications for both products and services, done using different type of digital technologies. Digital marketing is synonymous with online and internet marketing, and among its main tools are digital and social media, websites, blogs, SEO, SEM (Search Engine Marketing - promotion of websites by increasing their visibility in search engine results pages, primarily through paid advertising), e-mail, e-WOM (electronic Word-of-mouth - the use of social media platforms and websites to promote a product or service), etc., which are used to engage existing and potential customers in different stages of the decision making process. These tools could easily also be described as inbound marketing techniques, where marketing activities aim to bring in customers by providing them with information and creating awareness by generating stimulating content (Halligan, 2009). Through digital marketing companies aim to promote their brands and generate more sales, but also to develop relationships and engage customers. Customer engagement could be expressed through participation of the customer in the process of creating new products, reference, sharing information about the brand and the company's activity (WOM), and feedback on products and services of the company (Pavlova, 2018), thus proving the importance of a well-balanced marketing strategy for the development and growth of any organization.

In short digital marketing offers the opportunity to promote any type of product or service on the Internet and any other electronic channel, and targets a large number of online users and specific audiences with information about a product or service. Digital marketing tools make it easy for the user to gather free information, review and shop online, whether from a desktop or a mobile device. From the point of view of the organization, the digital marketing tools also offer other advantages to the traditional marketing, most importantly:

- affordable and easy to use, especially in regards to social media;
- lower advertising costs;
- highly targeted audiences;
- easily measurable;
- audiences can be reached in a much shorter period of time, regardless of location
- direct communication with customers at all time.

Currently digital marketing is considered to be the most common way to reach out to a potential customer, with the opportunity for highly personalized and influential advertisements. In fact, according to some researchers, we are currently in a “postdigital” world in marketing, where the concept of a division between “digital” and “traditional” marketing is outdated. Instead, digital marketing is considered just marketing, since almost all marketing activities a firm might consider now have some kind of digital aspect. (Lamberton & Stephen, 2016).

The wide variety of digital marketing tools and platforms at the disposal of any organization makes the selection of the suitable communication channel a challenge. The basic digital marketing tools are summarized in Table 1. As it is shown, each platform has its own specific purpose and consequently the communication strategy for each platform (both from the consumer and from the point of view of the business) should be adapted according to the target audiences. Through digital marketing it's relatively easy to reach out and engage any audience and to spread information even for niche products and services, such as the adventure tourism. With the variety of marketing tools in the digital world and the almost infinite possibilities for their utilization, it's important for every organization to be proactive and evolve according to the marketing trends for the specific industry. The decision making power lies entirely in the hands of the consumer, as usually he initiates the contact, searches for information, shares

comments and opinions with other potential customers, so the presence of the company online is a decisive factor for commercial success.

Table 1. Basic digital marketing tools

Tool	Description	Usage
Website	The website is the main source of information about the company, its products, services, history. Could include online store for direct purchase, blog, message boards, etc.	<ul style="list-style-type: none"> - Main information source for consumers; linked from other DM channels - Building brand awareness - Communication with customers and audiences - Increase of purchase intentions - Purchase (online store)
SEM	Promotion of websites by increasing their visibility in search engine results pages, mostly through paid advertising. Usually incorporates search engine optimization (SEO).	<ul style="list-style-type: none"> - Building brand awareness - Increase purchase intentions - Purchase - Highly targeted audience
Display Advertising	The company's promotional messages appear on third party sites or search engine results pages such as publishers or social networks; usually through banners or other ad formats made of text, images, flash, video, and audio.	<ul style="list-style-type: none"> - Building brand awareness - Increase purchase intentions - Purchase - Remarketing - Highly targeted audience
Social Media	An interactive multi-user site whose content is created by network users. This creates an automated social Web environment where large groups of users can communicate with common interests and preferences. The connection between users is via the Web service on internal mail or through instant messaging programs. Includes blogging websites, microblogging, wikis, and livestreaming.	<ul style="list-style-type: none"> - Building brand awareness - Communication with customers and audiences - Distribution of e-WOM - Opportunities for influencer marketing - Increase purchase intentions - Highly targeted audience
e-mail marketing	Sending commercial message, typically to a group of people (potential or current customer). Usually involves sending advertisements, request business, or solicit sales or donations.	<ul style="list-style-type: none"> - Building brand awareness - Communication with customers and audiences - Increase purchase intentions - Highly targeted audience
Mobile Applications	A computer program designed to run on a mobile device such as a phone/tablet or watch; usually offer specific information or user interface, depending on the goals of the publisher and the target audience.	<ul style="list-style-type: none"> - Building brand awareness - Communication with customers and audiences - Increase purchase intentions - Highly targeted audience

3. Adventure tourism and communication trends

Tourism as a whole is one of the most rapidly growing sectors in the world, with its different types and forms is capable of satisfying various target consumers. In the globalizing world tourism services are key for protecting and simultaneously evolving a country's natural resources, cultural specifics and history. The counties, subjected to the survey presented in this paper, are no exception, as obvious by the role the tourism sector plays for the nation's GDP (Table 2). The tendency for the surveyed counties is growth, and the importance of the sector

is only expected to raise in the future years. In lone with that there are currently many programs, that support the development of different tourism categories, both on a national level and by the EU.

Adventure tourism is one of the fastest growing categories in the tourism industry as a whole. Countries in different stages of economic development are stimulating the development of such services, since they recognize the ecological, cultural, and economic value they provide (<https://skift.com/wp-content/uploads/2014/11/unwto-global-report-on-adventure-tourism.pdf>).

Table 2. Tourism total contribution to GDP, %

Country	2015	2016	2017
Bulgaria https://knoema.com/atlas/Bulgaria/topics/Tourism/Travel-and-Tourism-Total-Contribution-to-GDP/Contribution-of-travel-and-tourism-to-GDP-percent-of-GDP	10.8%	11.2%	11.5%
Estonia https://knoema.com/atlas/Estonia/topics/Tourism/Travel-and-Tourism-Total-Contribution-to-GDP/Contribution-of-travel-and-tourism-to-GDP-percent-of-GDP	15.1%	15.4%	15.4%
Ireland https://knoema.com/atlas/Ireland/topics/Tourism/Travel-and-Tourism-Total-Contribution-to-GDP/Contribution-of-travel-and-tourism-to-GDP-percent-of-GDP	5.5%	5.7%	5.9%
Scotland https://www.gov.scot/Topics/Statistics/Browse/Business/SABS/KeyFacts	5.6%	6.0%	8.4%

Adventure tourism is defined by the Adventure Travel Trade Association as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. For the average consumer, adventure touristic services are experience-based vacation, providing them with the opportunity to try out new activities, challenge their skills and knowledge and immerse themselves in the local culture.

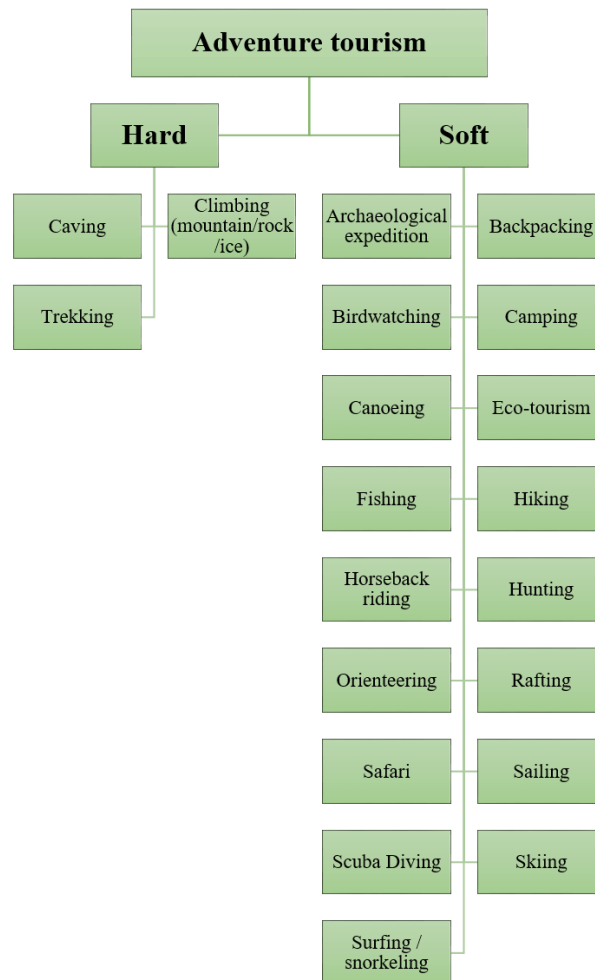


Figure 1. Types of Adventure tourism according to ATTA(Adventure Tourism Trade Association, 2013)

For companies, that offer such niche services, adventure tourism guarantees visitors outside of peak season, since these activities widely differ from the mass tourism experience (such as summer sea package vacations, cruises, group culture or historical travels, etc.).

The adventure tourism, as a part of the alternative tourism services, shares some aspects of its concept with other types of tourism, such as sustainable tourism, responsible tourism, eco-tourism, volunteer tourism, etc. None of these types of tourism are mutually exclusive and they have their specific target audiences, destinations and activities, and their definition largely depends on the service strategy of the company and the perception of the customer.

According to most researchers and tourist organizations, there are two main categories of adventure activities, hard adventure and soft adventure. The most widely used classification between hard and soft forms of adventure tourism is visualized in Figure 1. The figure shows, that usually soft tourism services are more easily accessible and require limited or no previous expertise and skills, while hard adventure tourism services are targeted towards more experienced travellers with specific skills and previous experience.

In addition to hard or soft adventure activities, the tourists themselves could also be considered as two different groups. There are the enthusiasts that devote their free time to a specific activity and become increasingly more skilled, tending to pursue the same type of adventure tourism service (even if in different locations). They usually invest in more sophisticated gear and look for more challenging destinations. The other group of adventure tourists are willing to try out

new experiences and tend to switch destinations and activities, without devoting significant resources for one specific type of tourism activity.

Understanding the various types of services and the different target groups for them is the first step towards developing a successful marketing strategy, but is even more important when it comes to the highly targeted digital marketing. Clear understanding of who the consumer is and what he looks for requires open dialogue and flexibility by the company.

The main channels for information on different and alternative types of tourism in recent years have been the different types of social media. Free pages and profiles for organizations and their accompanying options are extremely valuable tools, especially if the target audience is young and active people looking for new opportunities. Unlike classic media communication tools, social media communications are extremely effective on the basis of much more limited resources. For the effective presence of a tourism service organizer, it is necessary to implement a mix of different tools to perform several basic functions - to provide information to users, to enable dialogue and answer questions, to distribute pictures and videos (to visualize the nature of the service), allow them to be shared and distributed and have sales options (if necessary). Through social media platforms the value of WOM communications is ever more evident, as consumers tend to share, distribute, comment and rate all types of products and services. The information provided by friends, relatives and colleagues turns out to be of great importance in the decision-making process in the adventure tourism industry as well, and e-WOM communication is particularly relevant in terms of less known forms of tourism or alternative destinations (Figure 2). As seen by the figure, the online research is usually the first step when planning an adventure tourism activity, so the provider should be present, demonstrating the best qualities of his service.

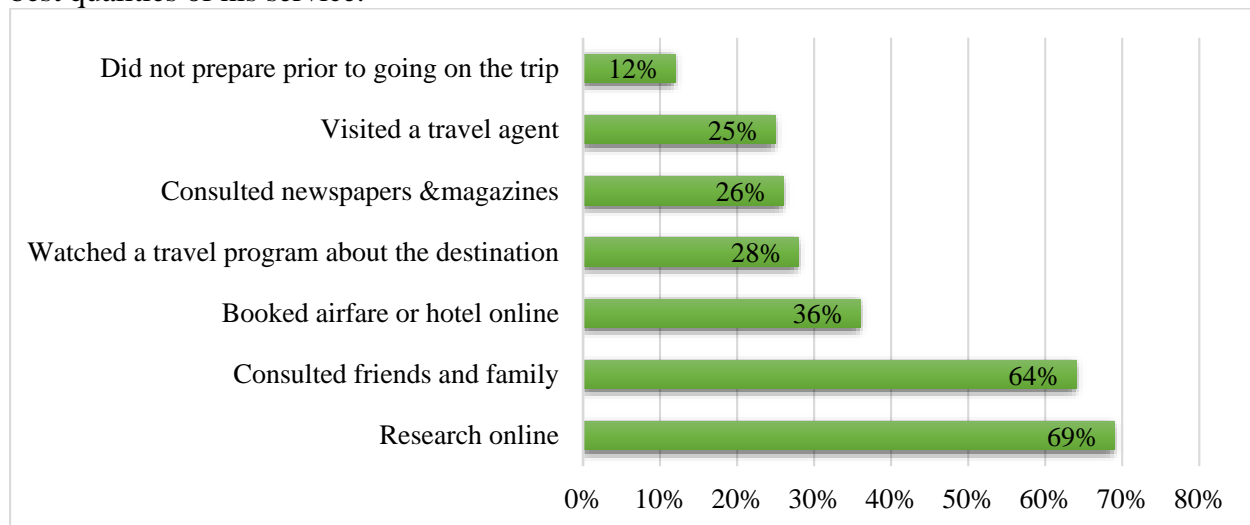


Figure 2. How did you prepare for your last trip? (Adventure travellers)

Source: ATTA, 2013.

This tendency for the use of social media as basic communication tools is particularly relevant in the surveyed countries (as seen by the results, presented in the next paragraphs), especially through Facebook, which has become the most popular and accessible network worldwide, and with the usage of a website and multimedia content such as pictures and video to demonstrate the nature of the proposed activity.

4. Methodology and results

The survey was conducted over the end of 2017 up to the 15th March 2018, with the same questionnaire being distributed among organizations in Ireland, Scotland, Estonia and

Bulgaria. The survey consisted of 10 questions, regarding digital marketing and product development in the field of adventure tourism. All questions were scaled, but respondents were given the opportunity to provide extra information in the form of free responses. The quantitative data relates to the usage of different digital marketing channels and the perceived skills and desires of the respondents, and were primarily gauged on a 1-5 scale, where 1 is the negative end of the scale, while 5 is the most positive answer. The questionnaire was distributed online via free survey platforms such as LimeSurvey, Google Forms, and SurveyMonkey, and was sent directly to parties identified as relevant to the topic of the survey – adventure tourism organizations and stakeholders. The combined total of all responses is 107. The key results are presented in this paper in a comparative matter for the participating countries.

For the purpose of the survey the respondents were selected as having experience and currently offering services in the field of adventure tourism. Most of the organizations, that took part in the survey, are SMEs with up to 50 employees (Table 3).

Table 3. Number and type of respondents

Country	Number of respondents	Types of organizations
Bulgaria	21	SME, NGO
Estonia	34	SME, NGO, Governmental
Ireland	24	SME, NGO
Scotland	28	SME

Respondents were asked to share information regarding the frequency of usage of some of the most popular digital marketing tools, esp. social media platforms, rating them on a scale of 1 (rarely/never used) to 5 (most often used). Average scores were calculated for all represented countries and are shown in Table 4.

Table 4. Frequency of usage of digital marketing channels (average score)

DM channel	Bulgaria	Estonia	Ireland	Scotland
Website	5	4.23	3.86	4.38
Facebook	5	4.38	4.29	3.88
Twitter	1.05	1.52	2.41	1.87
Instagram	1.43	3.17	2.95	2.66
Pinterest	2.38	1.57	1.64	1.38
Snapchat	1	1	1.32	1

According to the gathered data, Facebook is without exception the most often used social media platform by respondents in Bulgaria, Estonia, Scotland and Ireland, having a score above 4 on the scale. In Scotland Facebook is ranked second as a digital marketing tool, after the organization's website, which takes second place in the case of Estonia and Ireland. For Bulgarian respondents the website and Facebook are tied with the maximum score, a surprising result, since most of the tourism organizations don't have a developed website (as could be seen in the national Register of tour operators and travel agents: <http://tourism.egov.bg/registers/TORRegister.aspx?AspxAutoDetectCookieSupport=1>).

Instagram proves to be second most often used social media platform, surpassing Twitter and Pinterest. Only exception is Bulgaria, where Pinterest is second most often used SM platform. Most unfavourable in all countries is the score of Snapchat, probably due to the platforms limited range and usage options and specific target audience.

It is interesting to note, that respondents from Scotland state, that they often use conventional marketing channels for promotions, such as newspaper, magazines and radio. They also state, that YouTube and MailChimp (used for e-mail marketing) are used very often as marketing tools, more often than Twitter, Pinterest or Snapchat.

Organizations were asked to grade their own perceived digital marketing proficiency, again on a scale of 1 to 5 (5 being the most favourable score). Respondents from Estonia, Ireland and

Scotland rank themselves as average in their DM skills, with scores around 3 (Table 5), proving a need and desire for learning and improvement.

Table 5. Proficiency in digital marketing

Country	Digital marketing proficiency (Average score)
Bulgaria	4.05
Estonia	2.69
Ireland	3
Scotland	2.88

Only exception is the score of Bulgarian enterprises, where the digital marketing proficiency is ranked above 4 on the scale. The confidence, shown by respondents from Bulgaria, could easily be explained by their understanding on what digital marketing means. For Bulgarian enterprises the tools to develop digital marketing campaign are mostly the organizations website, Facebook page and e-mail marketing, since these are the most often used information sources by Bulgarian consumers (Palamarova, P. Social media in business activities of Bulgarian SMEs. International Journal “Knowledge in Practice”, Skopje: Grafoprom Bitola, Vol. 15.2. , 2016).

The organizations were also asked to list the most effective forms of digital marketing according to their experience. Most often mentioned were the website and Facebook account, but also paid forms of online advertising (Google AdWords, Facebook Ads, etc.), as well as e-mail marketing. Some respondents mentioned the usage of mobile application such as TripAdvisor, Booking and Foursquare as an effective way to market their businesses to broader audiences.

In order to determine what forms of digital marketing could be included in the organizations marketing strategy they were asked to rate the importance of various newer or more uncommon DM skills. Highest average score has the Search engine optimization, followed by the usage of specialized platforms for adventure tourism. Relatively lower are the scores for the use of drone technology, augmented reality and wearable devices as marketing tools, as their implementation suggests substantial financial resources and the effects are limited to a small percentage of the consumers (Table 6).

As a whole for Bulgarian respondents the offered skills were highly ranked with average scores over 3, proving, that these types of digital marketing are relatively unknown or currently unused by the organizations. As most important are perceived the location applications and tracking devices, which in the case of tourism services are key aspect of any information campaign, but also for successful realization of the services.

Table 6. Importance of digital marketing skills (average score)

Digital marketing skills	Bulgaria	Estonia	Ireland	Scotland
Digital Media Platforms for Adventure Tourism Sales and Marketing	3.95	4.23	4.5	3.5
Search engine optimisation	3.05	4.62	4.68	4
Location-based Mobile Applications	4.43	3.08	4	3.13
Augmented Virtual Reality	3.62	2.77	2.23	2
Accurate Position Tracking and Mobile Apps/Devices	5	3.33	2.90	2.25
3D and 4D personalised site tours	4.24	2.33	3	2.13
Drone technology	3.72	3.33	3.64	2.13
Interactive /responsive wearable devices	4.29	2.42	2.73	2.13

In addition the respondents were asked to share their desire to improve their digital marketing skills, by providing examples for specific topics they wish to learn more on. Most often cited were the promotional video making skills, including storyboarding, scripting, editing, etc., as

well as platforms for sharing said video content. These skills are perceived as key for engaging customers, since the adventure tourism service cannot be shown or described with enough impact without video element. Other skills, that organizations wish to develop, are usage of display advertising, as well as website management and social media profile management.

5. Conclusion and further implications

In the current paper the trends in marketing communications in the tourism industry were analysed, with focus on adventure tourism services and the use of digital marketing tools for their promotion. The desk research outlined the definite trend for incorporation of online advertising and development of serious web presence of the companies that wish to attract new customers, but also retain existing ones. With such niche services the target audience should be considered as international, and the easiest and cost efficient method for reaching out prove to be digital platforms such as social media, websites and mobile applications.

The surveyed countries prove to be in line with the global trend, with the importance of the tourism industry showing definite trend for growth. In this situation it is of high importance to for local businesses to maximize their digital marketing skills, in order to achieve their goals.

The results of the conducted survey illustrate the trends in digital marketing in Bulgaria, Estonia, Ireland and Scotland. Currently organizations, offering services in the field of adventure tourism, are mostly utilizing their websites and Facebook profiles (including the paid promotion the social media offers) in order to attract new customers and retain existing ones.

The results however point towards interest in developing other digital marketing skills as well, in order to achieve a more rounded social media presence for more effective marketing. Effective content creation for digital marketing purposes was also mentioned as a desired skill to enhance the digital marketing output. Video making and photography stand out as highly desired skills, as these can be used in a variety of digital marketing instances and are crucial to a professional business. This is also important due to the ways in which video and image posts are the easiest way in which the adventure service could be best demonstrated to immerse the potential customer, and that they are often searched for by said target consumers.

When self-assessing their own digital marketing skills, the majority of respondents rated themselves as average or above average, showing the room for improvement. The skills that were established as most important to learn about centred on SEO and Digital Media Platforms for Sales and Marketing. Other highly anticipated tools include position tracking apps, suggesting an interest in using digital technologies to enhance the in-field experience.

The other digital technologies suggested did not receive as much favour, but were not necessarily rated negatively. There is hesitancy to incorporate additional technologies due to the additional cost they may involve, and the lack of understanding of how these technologies could be incorporated into the business. Nonetheless the respondents show interest and desire to develop the skills necessary for the implementation of said tools.

The results of the survey outline opportunities for further research to determine the ways in which the newer digital marketing tools could be implemented into the business strategies of the adventure tourism companies. The point of view of the consumers should also be a subject of further research, to determine the most easily accessible tools and their desire to communicate using different devices and platforms.

The future of marketing communication strategies in the field of adventure tourism will necessarily be marked by a variety of digital innovations, expanding the opportunities for marketers to implement different strategies and create different communication mix according to the specific target audiences. Incorporating different types of digital communication tools into the mix of the organization proves to be key factor for successful realization of the company's services.

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