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# Adventure Tourism In Scotland

Research Report – August 2015

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# 1 Introduction to the Research

1.1 It is an exciting time to report on the Adventure Tourism (AT) sector in Scotland. AT is growing rapidly globally and Scotland has a world class product. There is increasing recognition of the value of the outdoors to the Scottish economy, and this is evident through the research findings. AT covers a range of activities, such as walking and climbing, cycling and biking, river activities, marine activities, wildlife and nature watching and snow activities.

## About the review and what it covers

1.2 The review is a pan-Scotland study led by Highlands and Islands Enterprise (HIE). It has been conducted by ekosgen, in partnership with the University of the Highlands and Islands (UHI) Centre for Recreation and Tourism Research (CRTR), and Reference Economic Consultants. Steering group representation has included VisitScotland, Scottish Enterprise (SE), Scottish Development International (SDI) and the Scottish Tourism Alliance (STA).

1.3 At a headline level the review assesses the scale and scope of AT activity across Scotland. Specifically, the research:

- Provides an overview of the size, shape and composition of Scotland's AT market, including an overview of the business base and an illustration of how the key players engage with one another in showcasing and distributing their products and services. The review seeks to further segment the AT market by geography and sub-sector to provide insights into where cluster activity is prominent and where opportunities for niche development exist.
- Reviews the existing information on market demand, and identifies the most significant growth opportunities for the sector in Scotland and the priority infrastructure and investment requirements to meet and accelerate these opportunities. The role of the public sector, private sector and landowners in meeting these requirements is also explored.
- Identifies barriers impacting on Scotland's capability to meet the infrastructure and investment requirements, providing recommendations on how these may be addressed.
- Analyses how competitive and innovative the Scottish AT product offering is against destinations worldwide, identifying where Scotland has the best competitive advantage.

## How the research was conducted

1.4 The research has been wide ranging, seeking to achieve breadth of coverage and more in-depth sector insight. In line with the study objectives, it has sought to establish the shape and composition of the sector, how key players interact with one another and to identify growth opportunities and sector support requirements. This has been achieved through extensive primary research supplemented by desk-based research and an international benchmarking exercise. The research did not aim to quantify the value of the sector.

1.5 Specifically, the research has consisted of:

- Identification of 351 AT businesses in Scotland, through liaison with trade bodies, Destination Marketing Organisations (DMOs) and membership organisations;

- Analysis of 214 completed AT business proformas which included basic business information on location, offer/ product, employment, turnover and growth plans (including business confidence relating to growth/ decline);
- Some 71 further qualitative in-depth telephone interviews of a representative sample of AT businesses;
- Consultation with 24 key stakeholders with a view on the AT sector. As well as the review Steering Group this has included geographical and sub-sector representative organisations;
- Three workshops involving a selection of businesses, stakeholders and industry representatives. An additional group session was held with delegates of the Wild Scotland Annual Industry Conference in November 2014;

1.6 A full description of the methodology used in this study is provided at Appendix A.

## How the report works

1.7 The report is structured in the following way:

- Chapter 2 – provides a detailed definition of the Adventure Tourism sector in Scotland and the assumptions that were applied when collecting businesses' details.
- Chapter 3 – provides a contextual overview of the Adventure Tourism sector and summarises previous research.
- Chapter 4 – details the AT sector in Scotland, including the profile of businesses, their location, their size in terms of employment and turnover and their growth plans.
- Chapter 5 – gives an analysis on the AT sector market, including details on sub-sectors, their scale and scope, product offers, and SWOT analyses.
- Chapter 6 – benchmarks Scotland's sector against other international locations and Scottish destination hubs against other international destination hubs.
- Chapter 7 – outlines the key growth opportunities and challenges for the AT sector, identified through primary research for the study.
- Chapter 8 – provides conclusions and recommendations for future investment priorities in the AT sector in Scotland.
- Appendix A – details the full methodology used throughout the research study.
- Appendix B is the initial proforma used with businesses for the mapping exercise.
- Appendix C contains the in-depth interview questionnaires used with the selection of adventure tourism businesses.
- Appendices D through H provide additional data to complement the benchmarking exercise at Chapter 4.

# 2 Adventure Tourism in Scotland – what do we mean?

## Introduction

2.1 This chapter details the definition of Adventure Tourism (AT) used by the study team for this commission and any assumptions which were made throughout the research.

## Definition of Adventure Tourism

2.2 The definition of the AT sector used for this study is the now commonly held sector definition developed in the *Adventure Tourism in Scotland – Market Analysis Report 2010*, and is as follows:

- **Walking/Climbing:** mountain walks/treks, long distance trails, rock climbing and mountaineering;
- **Cycling/Biking:** cycle touring and mountain biking;
- **River Activities:** canoeing, kayaking, rafting and canyoning;
- **Marine Activities:** sailing, kayaking, surfing and diving;
- **Wildlife/Nature Watching:** boat and vehicle excursions and walking; and
- **Snow Activities:** ski-ing, snowboarding, ski-touring, snow-shoeing and ice climbing.

2.3 There are also other high adrenaline, specialist activities which fall under the blanket of AT, such as sky-diving, bungee jumping, river-bugging and caving. These activities have been included in the sector definition for this study; although they are typically considered less valuable in terms of visitor spend[1] given their more narrow definition, and in relative terms, the fewer numbers of already well informed participants who are involved in these activities.

2.4 In defining the sector using the sub-sectors above, we have been mindful throughout to cover both 'soft' and 'hard' adventure. **Soft adventure** can be described as *'a travel experience that goes beyond the typical tourist itinerary... is rewarding for the spirit and the mind... is safe without excessive physical demands'*[2]. Examples of soft adventure activities include camping, walking on gradually changing terrain and flat/short route bicycling. Soft adventure is the most popular form of AT because it is available to a wide range of people as less physical effort is required, there are usually lower risks, tours/ activities are generally over shorter lengths and the activities suit a variety of budgets.

2.5 **Hard adventure,** on the other hand, is a travel experience that has *'more physical challenges, a higher element of risk, is rewarding to the spirit, and pushes people outside of the comfort zone'*[3]. Examples of such activities include mountain biking, white water rafting, kayaking, mountaineering and bungee jumping. Hard adventure tends to appeal to a more specific audience because a certain level of physical fitness can be required, tours/ activities may vary in length and they are often relatively expensive and require certain equipment. However, these audiences can still include generalists/ dabblers and beginners, and still provide a good return to the economy.

2.6 The adventure tourism activity of estates is also covered under this review, for example the Atholl Estates, as well as the activities of the likes of Torridon Hotel in Wester

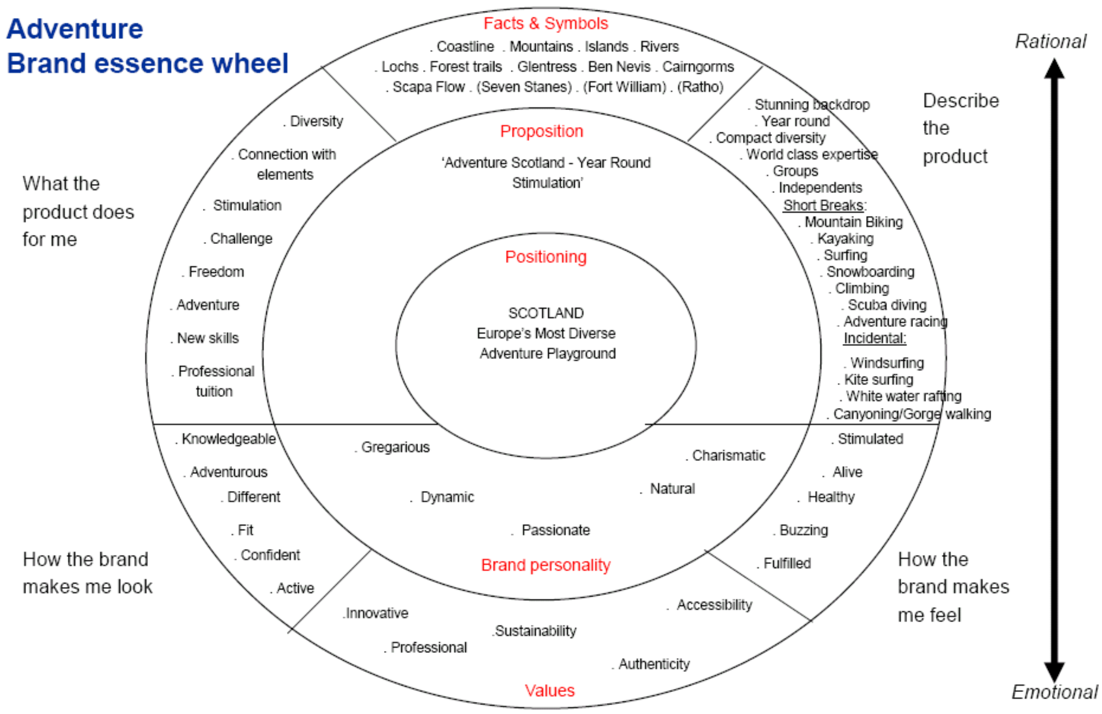
[1] Adventure Tourism in Scotland, Market Analysis Report (2010) Paul Easto and Caroline Warburton. http://wild-scotland.org.uk/wp-content/uploads/2010/12/TIG-report.pdf
[2] Otago Polytechnic, Adventure Tourism presentation.
[3] *ibid*

Ross which offers activities such as mountain guiding, gorge scrambling, sea kayaking and canoeing to guests and locals. Although not dedicated or confined to adventure tourism activities and experiences, these providers are nonetheless an important part of the sector. Country sports, however, are not covered by the review.

**The Adventure Tourism Wheel**

2.7 The diagram below displays an 'Adventure Tourism' brand essence wheel, devised by VisitScotland, which shows words or phrases associated with a particular brand or product – in this case, Adventure Tourism in Scotland. The wheel displays visitor perceptions on a rational ('what the product does for me') to an emotional ('how the brand makes me look/feel') scale. This illustrates the breadth of the adventure tourism sector and the range of motivations for participation across activities, experiences, centres, tours and attractions.

***Figure 2.1***




Source: Scotland's Brand: Views from the UK Consumer (2011) Visit Scotland, p.4

## Three types of adventure business

2.8 AT businesses typically fall into three types of business – activity/experience providers, tour operators and activity centres and attractions - although some straddle the classifications. Nonetheless, the typologies are useful in consideration of the specific needs and opportunities related to each one. The three types of business are expanded upon below:

1) **Activity and Experience Providers** – this category contains the largest number of businesses and may include, for example, mountain guides, wildlife boat cruises, river rafting operators and canoeing instructors. These businesses are typically based in one location but may provide their activities on a regional or national basis. Activities and experiences may last from a couple of hours (group kayaking) to several days (guided walk along the West Highland Way).

2) **Adventure Travel Tour Operators** – this category contains businesses that are fully fledged tour operators, providing customers with a package of services including

accommodation, transport, guides and equipment as required. These operators may work on a fixed departure group basis and typically operate throughout Scotland, although some tour operators specialise in particular regions (e.g. Outer Hebrides). These businesses may work directly with the consumer or through intermediaries, such as travel agents or DMOs.

3) **Activity Centres and Attractions** – this third category includes the many activity centres and attractions throughout Scotland that provide a range of adventure and nature based experiences. Some centres specialise in training, personal development and personal qualifications, while many focus on the delivery of educational services to local authorities and youth groups. Some of the centres have a leisure and corporate focus, offering a range of on-site activities, and many have on-site accommodation in which customers can both dine and stay overnight.

2.9 Given the differences between the three groups of businesses, the report draws out the distinctions between them throughout the review analyses. In particular, tour operators behave quite differently, and have different demands and level of influence/impact, than activity/ experience providers and centres and attractions.

## What is and is not included

2.10 A number of assumptions have been made for this study in terms of included and excluded activities, and these are outlined below for clarity.

- Golf activity is not classed as Adventure Tourism.
- Go-karting and segway activity is not classed as Adventure Tourism.
- Hire businesses (e.g. cycle hire) are not included in the research (unless they also provided the activity). Similar retail outlets such as cycle shops are excluded, again unless they are direct providers of activity.
- Club organisations (e.g. Falkirk canoe club) are not included in the research, as, although some provide adventure activities, they are membership based and not typically accessed by tourists.
- Other businesses in the supply chain (e.g. accommodation providers, hire businesses etc.) are not included in the research, unless they also provided an activity.
- Local Authorities (councils) are not included in the research, although some may be activity providers/ centres or attractions.
- Regional Bodies (e.g. HIE, Scottish Enterprise etc) are not included in the research.
- International tour operators based outside Scotland are not included, although Adventure Tourism tour operators based in Scotland (who may include some tours outside Scotland as part of their business) are covered by the research.

2.11 Further, there are some Adventure Tourism businesses (activity providers, centres/attractions and tour operators) that have not been covered in the research, although every effort was made to ensure as complete coverage as possible. The authors were partly reliant on the co-operation of umbrella organisations providing AT business details, so in some geographic areas there may be under-representation of sector businesses.

# 3 Adventure Tourism in Scotland – what did we already know?

## Introduction

3.1 There is extensive research into the AT sector as a whole in Scotland, as well as research undertaken in relation to a number of the sub-sectors. This existing research, summarised below, tends to focus primarily on market demand and less on understanding the composition of the sector and any current geographical clustering of activity.

## A word on the existing research

3.2 It is worth noting that no research exists that provides a comprehensive overview of the scale of the AT sector in Scotland which is current and up-to-date. This is particularly the case in relation to employment and impact in the sector, and opportunities for sector growth.

3.3 The research reports that do exist are now becoming dated, and many are pre-recession. They focus primarily on the following aspects of the industry:

- Size and characteristics of the global market;
- The scale of visitors;
- Specific sub-sectors; and
- Data and trends.

3.4 It is, however, worth briefly reviewing these reports which provide some background and context and a number of useful insights that help to inform this study. These are discussed below in a format that considers, first, the global context, then AT in Scotland and finally what are considered to be key sub-sectors.

## Existing research and outlooks for the global sector

3.5 The United Nations' (UN) World Tourism Organization global report of 2014[4] provides a contemporary overview of the adventure tourism industry. Some of the key findings are discussed below.

**Structure of the Adventure Tourism Sector**

3.6 The UN report identifies that adventure tourists typically go through six key stages (see below). These are as relevant to booking a wildlife watching holiday in Mull as choosing to mountain bike in Whistler in Canada. The six stages are:

- Dreaming;
- Consideration of destination possibilities;
- Planning;
- Booking;
- The experience; and
- Sharing (of memories).

3.7 In view of this, it is extremely important that AT businesses in Scotland consider these stages, particularly in the promotion and provision of experiences. In this way, the authors contend the aspiration should be to:

a) put Scotland at the foremost of consumers' minds;

[4]https://s3-eu-west-1.amazonaws.com/staticunwto/Affiliate-members/1-GLOBAL +REPORT+ON+ADVENTURE+TOURISM_online.pdf

b) make consumer participation in AT straightforward;

c) establish the expectations of consumers and well exceed/ surpass these, by making the experience first class (or even better “amazing”) and;

d) understand that word-of-mouth is extremely important and a valuable and cost effective route for regenerative new customers.

3.8 The UN report also states that to understand the sector, and its inherent complexities, there are a number of core elements that need to be understood, including the:

- Supply chain – this current review spends some time seeking to understand the relationship between AT sector businesses and the supply chain/related activity, including accommodation;
- Marketing channels – again, our review seeks to understand the importance of routes to market, including the use of the internet and social media;
- Governmental structures – in this respect the key agencies in Scotland have participated in this review and are a key audience for it; and
- Use of technology, which has a huge impact on the way that adventures are booked at each of the six stages outlined earlier.

**Global Trends**

3.9 Although its definition of adventure tourism is rather wider than that used for the purposes of this study, and includes cultural experiences for example, according to a 2013 Adventure Trade Travel Association (ATTA) study[5], AT globally rose in value by 195% from 2010 to 2013 to $263 billion. This is a very significant increase in value in three years, particularly given some economies were still experiencing the effects of the global downturn. The very large rise in value has been attributed to increases in:

- Expenditure on vacation;
- The percentage of people choosing an adventure travel holiday compared to other forms of holiday; and
- The number of people taking holidays.

3.10 The following key trends are fuelling demand:

- The rise of emerging markets – e.g. China, India, Macedonia, Mexico, Chile, Peru;
- Dis-intermediation – i.e. the effects of the rise in direct booking, removing the middle man, facilitated by the internet;
- Increased connectivity – which goes hand-in-hand with the dis-intermediation point above; and
- The changing nature of demand as consumers try new experiences and new destinations.

3.11 These are global trends, and are important markers for Scotland which will increasingly be competing against other worldwide destinations.

3.12 On the supply side, the ATTA report states that there are trends associated with the professionalisation of the workforce, and an associated focus on training; an increase in

[5] Adventure Tourism Market Study (2013) ATTA. http://www.fairtrade.travel/uploads/files/ATTA_-_Adventure_Tourism_Market_Study_2013.pdf

destinations incorporating adventure into their brands; and an increasing number of companies using adventure as a brand identity.

**Enabling Adventure Tourism**

3.13 There are many interrelated conditions required for the sustainable success of adventure tourism in any given destination[6], including:

- Stakeholder and community input;
- Public sector support - institutions and policies;
- Safety policies;
- Soft infrastructure: signage, trails and guide training for example;
- Effective asset management: natural, cultural and adventure resources;
- ICT infrastructure;
- Competitive price;
- Innovative marketing; and
- Training programmes.

3.14 While the natural and cultural assets form the core of the customer experience, ATTA argues that all these complementary elements need to be developed for a flourishing adventure tourism sector[7].

## Existing research: AT in Scotland

3.15 The 2010 report on AT in Scotland for the Tourism Innovation Group (TIG)[8] cited United Kingdom Tourism Survey data, which estimated holiday trips and spend for key sectors (Table 3.1 based on 2008 data). For this report, 'adventure sports' includes a range of activities including rafting, kayaking and climbing which are part of the AT definition in this review.

**Table 3.1: UK Visitor Activities Undertaken in Scotland (2008)**

| Activities | Holiday trips (thousands) | Spend (£m) |
|---|---|---|
| Walking | 1,798 | 520 |
| Watching wildlife | 429 | 159 |
| Adventure sports | 253 | 66 |
| Mountain biking | 98 | 14 |
| *Source: Adventure Tourism in Scotland, Market Analysis Report (2010)* | | |

3.16 In terms of forecast growth the report cited a 2009 YouGov survey, which estimated a 70% increase in adventure 'travel' over the following three years and a trebling in the number of adventure holidays for example. The authors of the TIG report did not distinguish between adventure tourism and adventure travel, the former being defined in the broad terms of the Adventure Travel Trade Association.

3.17 The oft-quoted 2007 VisitScotland report, 'What will activity and adventure tourism look like in 2015', put forward a target (as part of a contribution to the former national strategy) for healthy growth in the number and value of adventure tourism trips to Scotland over 2012-2013, albeit with a flattening of the growth between 2013 and 2015. Taking a more positive approach in terms of growth patterns, it was predicted that adventure tourism could

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[6] Adventure Tourism Market Study (2013) ATTA. http://www.fairtrade.travel/uploads/files/ATTA_-_Adventure_Tourism_Market_Study_2013.pdf
[7] *ibid*
[8] Adventure Tourism in Scotland, Market Analysis Report (2010) Paul Easto and Caroline Warburton. http://wild-scotland.org.uk/wp-content/uploads/2010/12/TIG-report.pdf

make an economic contribution of £849 million from 3.7 million trips. No post-recession study has attempted to verify these pre-recession forecasts.

3.18 Setting out the vision for the Scottish tourism sector, 'Tourism Scotland 2020', the national tourism strategy, identified both 'activities and adventure' (estimated value £759m) and mountain biking (estimated value £119m) as sectors with real growth potential (based on the above VisitScotland figures), also acknowledging the value of walking, cycling, sailing and adventure tourism in many rural areas.

3.19 The strategy identifies the need to develop skills in a range of areas within the sector that will support the industry's ambitions for growth, including:

- Management and leadership;
- Enabling high quality customer experiences;
- Making tourism an attractive sector in which to work; and
- Ensuring the availability of appropriate training.

3.20 In addition to this, the strategy also sets out three main growth markets forecasted to account for the majority of tourism spend in 2020. These are:

- **Home turf** – visitors from Scotland, England, Northern Ireland and Wales. This currently accounts for around £3.1bn of visitor spend, and has the potential to grow to £3.5-£4.2bn in 2020.

- **Near neighbours** – European tourists e.g. Scandinavia, Germany, France, Spain, Ireland, Netherlands and Italy. This group currently account for £730m and could grow to £880m-£1bn in 2020.

- **Distant cousins** – visitors from the US, Canada and Australia. These tourists currently spend around £400m, and this has the potential to rise to £500-£600m in 2020.

3.21 In addition to these three growth markets, emerging markets, such as the BRIC (Brazil, Russia, India, and China) nations, are growing strongly globally and could contribute to the Scottish tourism economy longer term, if tourism offers are aligned to their needs.

3.22 The VisitScotland 2011 and 2012 Scotland Visitor Surveys[9] achieved over 3,300 responses from visitors, and reported that the profile of visitors are:

- Balanced in terms of gender – 52% female, 48% male.

- Three quarters (73%) from the UK – 23% from Scotland and 50% from the rest of the UK. International visitors (27%) were made up of 15% from Europe and 12% from the rest of the world.

- Varied in terms of age – 9% aged 16-24 years, 17% 25-34 years, 21% 35-44 years, 22% 45-54 years, 20% 55-64 years and the remaining 12% are over 65 years.

3.23 VisitScotland has also published 2014 market research data based on returns from some 13,000 individuals[10], using the UK-wide refreshed approach to market segmentation. VisitScotland is focusing on five of the 10 UK market segments where it considers the greatest economic returns can be achieved, namely: *adventure seekers*, *curious travellers*, *engaged sightseers*, *food loving culturalists* and *natural advocates*. To some stakeholders, AT has typically been associated with enthusiasts, professionals/ aficionados and 'adventure

[9] http://www.visitscotland.org/pdf/External%20Scotland%20Visitor%20Survey%2011-12_pptx.pdf
[10] http://www.visitscotland.org/pdf/External%20Segmentation%20Paper%20Full%20Document2.pdf

seekers', one of the new customer segments. However, VisitScotland has rightly targeted 'dabblers' and 'beginners' as far back as 2004, recognising the greater economic benefits to be derived from these groups (and the fact that enthusiasts are already more aware of the AT product offer). This is changing and the segments interested in AT increasingly include 'curious travellers' (who may be looking for new activities and experiences) and 'natural advocates', who may be walkers, wildlife/nature watchers and participants in soft adventure.

## Existing research: Sub-Sectors

**Snowsports**

3.24 A 2011 HIE/SE study[11] identified a drop in skier/snowboarder numbers over the previous ten years, with an annual average of 199,100 skier days. The report suggested that this was a result of factors which included outdated infrastructure and, in particular, inconsistent winters and the rise of cheaper deals available to ski or board consumers overseas.

3.25 Recognising this, each of the resorts has diversified the range of activities it offers in the summer and shoulder seasons, most obviously into mountain biking (at Nevis Range and Glencoe for example), high ropes courses (at Nevis Range), micro-lodges (at Glencoe), and guided mountain-biking, walking, sightseeing and environmental interpretation (as at Cairngorm). The importance of these products, in light of the fluctuating winter seasons, should not be underestimated.

3.26 The 2010 value of the snow sports sector in Scotland was estimated at £30 million, creating over 630 jobs. Skiers and snowboarders continue to be relatively high spenders, with (at £23 per day) over double the average spend of general sightseers, although the figures were not broken down into tourists and local day-trippers. In economic terms, however, this is a relatively fragile industry; the report's authors noted that three of the five centres had gone into receivership and been sold or been restructured in the five years predating the study. Nevertheless, one commentator cited that the past three seasons (to 2015/16) have been very good, with a sense that the Scottish industry is better able to compete with European counterparts as VAT on uplift has decreased from 20% to 5%. Further, £5.5m is also being invested in upgrading chairlift facilities, with 75% coming from HIE and SE, and the remainder coming from the ski centres themselves.[12]

3.27 To address the issues facing the industry, a number of actions from the report were highlighted for attention, including:

- Increasing the average spend, both on and off-site;
- Increasing overnight stays and repeat visitors;
- Encouraging more people to enter the sports;
- Developing sightseeing opportunities and other activities to increase seasonal diversification;
- Creating greater local collaborations to increase local spend.

[11] Scottish Snowsports Strategic Review (2011), HIE and SE.
[12] http://www.bbc.co.uk/news/uk-scotland-31110161

**Cycling and Mountain Biking**

*Cycling*

3.28 Transform Scotland commissioned a study in 2013, on the value of cycling tourism to the Scottish economy[13]. It was reported that expenditure by leisure cyclists, including cycle tourists, in Scotland amounts to between £106-228m per year, in addition to a £58 million annual contribution to the Gross Value Added (GVA) of Scotland.

3.29 The report made a number of recommendations to develop the sector, including:

- Better stakeholder collaboration;
- Enhanced branding and promotion;
- Further development of cycle routes; and
- Better information provision, especially taking account of technological trends.

*Mountain Biking*

3.30 The 2013 report for Developing Mountain Biking[14] sought to establish the progress that has been made in the industry over the past few years, and deliver a series of recommendations for future development. It suggested a value for the mountain biking market, where mountain biking is the primary purpose for the trip, of £48.5m-£49.5m per annum. It was also estimated that, if the conditions set out for the original 'full growth' scenario[15] are met over 2014-19, economic growth will be in the region of £22m-£26m. If suggested developments are implemented to a lesser degree, growth over the next five years is suggested to be in the region of £14m-£18m.

3.31 This analysis fed into the development of a range of recommendations for the sustainable development of Scottish mountain biking, broken down into measures on:

- Strategic support;
- Facilities and business development;
- Attracting visitors;
- Expanding events;
- Increasing participation; and
- Sports development.

**Sailing**

3.32 A SE 2010 study on Sailing Tourism in Scotland[16] stated that the market accounted for £101 million annual expenditure, supporting around 2,700 FTE jobs, of which around 27% was the result of expenditure by non-Scottish boat owners, and a £53 million annual contribution to Scotland's GVA. The future economic impact of the sector was forecast to increase by 46% over ten years for visitors and 35% for Scottish boat owners, with growth particularly strong for visitors to the Clyde and 'north' areas.

3.33 To capitalise on the growth potential of the sector, it was recognised that the level, range and quality of infrastructure for home port boats and visiting boats needs to be

[13] The Value of Cycle Tourism (2013) Transform Scotland. http://transformscotland.org.uk/what-we-do/research/the-value-of-cycle-tourism/
[14] Developing Mountain Biking in Scotland Highland Cluster Study, (2013) University of the Highlands and Islands
[15] Economic Value of Mountain Biking in Scotland (2009) EKOS.
[16] Sailing Tourism in Scotland (2010), Scottish Enterprise.

improved. The focus of future development was suggested to be on the Clyde and in the 'west', to provide greater berthing facilities for both the Scottish market and especially boat owners from overseas. The report stated that particular emphasis in the west of Scotland needs to be given to creating strategic hubs, sailing itineraries and a better quality sailing product for overseas visitors. While the 'east' of the country has a very localised market, in the 'north' it was recommended that a 'string of pearls' and visitor nodes be developed to create attractive sailing itineraries for overseas boat owners in particular.

3.34 Further, the Marine Tourism Strategy was launched in March 2015 with a vision for Scotland to be *"a marine tourism destination of first choice for high quality, value for money and memorable customer experience delivered by skilled and passionate people"* by 2020.[17] The strategy supports the ambitions and targets of the national tourism strategy, and seeks to maximise the economic benefits of the marine sector as a whole, with sailing clearly a 'core' component of this, although the Strategy also recognises the value of 'established' marine activities such as sea angling and wildlife watching (see below) and 'emerging' marine activities such as sea kayaking, windsurfing and canal boats.

**Walking**

3.35 VisitScotland's (2014)[18] fact sheet on the walking sector confirms the popularity and importance of this activity. It was estimated that nearly four million domestic tourism trips were made in 2012 that involved short or long walks, worth £1,068 million to the Scottish economy. Even taking into account only trips where walking was the primary purpose, 521,000 trips were taken in 2012, yielding spend of £174 million. These trips were quite evenly balanced between genders, with a slight skew in favour of female participants, at least for shorter walks (under an hour). The north and west of Scotland, unsurprisingly, form the geographical focus for trips with walking as the primary purpose. A high proportion of overseas trips (52%) also involve walking as a holiday activity.

3.36 Importantly, consumer research suggested that:

- Scotland is seen as a wild but accessible destination, with scenery and wildlife as major strengths; and that
- The country's history, culture and friendly people add an 'emotional element' to walking in Scotland.

3.37 Further, those who "hill walk" are both more likely than average to participate in other outdoor activities, mountain biking or wildlife watching for example, and more likely to regard a trip to Scotland as their main holiday or a longer trip.

**Wildlife Watching**

3.38 Bournemouth University undertook a study to determine the economic impact of Scottish wildlife tourism for the Scottish Government in 2010.[19] The study estimated its net value at £65 million, supporting 2,800 FTE jobs, with a particularly high economic impact in the Highlands and Islands (50% of trips). This value was generated by an estimated 1.12 million annual trips where wildlife watching is the primary purpose; of these trips only 3% are made by overseas visitors, with 56% by domestic tourists and the remainder by day visitors.

[17] Awakening the Giant: A Strategic Framework for Scotland's Marine Tourism Sector
[18] Key Facts on Walking (2014) Visit Scotland http://www.visitscotland.org/pdf/WALKING%20factsheet%20FINAL.pdf
[19] The Economic Impact of Wildlife Tourism in Scotland (2010) Bournemouth University. http://www.gov.scot/Resource/Doc/311951/0098489.pdf

The value of overnight visitors to the sector is highlighted by the fact that these day-trippers only contribute £3 million of that £65 million.

3.39 Industry surveys suggested that middle-aged and relatively affluent 'empty nesters' form a large part of the market, and that many wildlife watching participants do so as a part of holidays with other activities as a primary focus. Industry optimism about the growth of the market is fuelled, to an extent, by the increasing coverage of wildlife watching in the popular media, and growing environmental awareness.

3.40 In order to capitalise on these opportunities, a tourist and business consultation undertaken for the Bournemouth University study advocated further structural development of the sector, including:

- National marketing;
- Visitor management and infrastructural improvements;
- Quality standards; and
- Strategic direction.

## Summary

3.41 The table below provides a summary of the economic data available from existing research reports.

| Table 3.2: Economic Data Summary | | | | |
|---|---|---|---|---|
| | **Visitors** | **Spend** | **GVA** | **Source** |
| **AT Sector Forecasts** | | | | |
| **AT sector** | 3.7m trips by 2015 (2007) | - | £849m by 2015 | Visit Scotland (2007) What will activity and adventure tourism look like in 2015? |
| **'Activities and Adventure'** | - | - | £759m by 2020 | The Scottish Tourism Alliance (2011) *Tourism 2020* |
| **Mountain biking** | - | - | £119m by 2020 | The Scottish Tourism Alliance (2011) *Tourism 2020* |
| **Recent Sub-Sector estimates** | | | | |
| **Walking** | 1,798,000 trips (2008) | £520m (2008) | - | Easto, P. and Warburton, C. (2011) Adventure Tourism in Scotland: Market Analysis Report |
| **Wildlife watching** | 429,000 trips (2008) | £159m (2008) | - | |
| **Mountain biking** | 98,000 trips (2008) | £48.5-£49.5m (2013) | | Easto, P. and Warburton, C. (2011) Adventure Tourism in Scotland: Market Analysis Report; UHI (2013) Review of Mountain Biking Developments and Potential Opportunities in the Scottish Enterprise area |
| **Sailing** | - | £101m (2010) | £53m | Scottish Enterprise et al. (2010) Sailing Tourism in Scotland |
| **Cycling** | - | £106-228m (2013) | £58m | Transform Scotland (2013) The Value of Cycling Tourism |
| **Snow activities** | 199,100 skier days p.a. (ten years to 2011) | - | £30m (2010) | HIE/ SE (2011) Scottish Snowsports Strategic Review |

# 4 The Adventure Tourism Sector in Scotland – where is it now?

## Introduction

4.1 An important part of the review was to understand the size and scale of the AT sector in Scotland. This was not straightforward given the number of sources of information for AT businesses and no single place to go to access this data. The sector is characterised by sub-sectors, sometimes by small and sole trader and lifestyle businesses, and geographic concentrations of activity. Still, the 'mapping' of the sector is the most detailed and comprehensive to have been undertaken 'bottom up' to date, which has produced some interesting findings.[20]

## A note on the mapping exercise

4.2 The data analysed in this chapter is taken from completed business proformas, and from desk-research where businesses were not contactable. In all, 351 businesses were identified throughout the mapping stage. Basic information was gathered for these businesses (although this varied depending on the amount of information that was provided from the source database and the level of detail available online). Whilst this is good coverage, the authors are aware that this is not full and complete coverage, and (as per 2.11) some businesses may not be covered by the study.

4.3 Of the 351 businesses, 217 completed proformas capturing information relating to business location and ownership, business activities, business size (employment and turnover) and growth plans (see Appendix B). In-depth telephone interviews were then undertaken with a sample of these businesses (71 in all); the findings from these in-depth interviews are detailed from Chapter 5 onwards.

## The Size of the Sector

4.4 There are at least 350 AT businesses currently operating in Scotland. These are named businesses and represent the majority of the sector, although it is not possible to state the true extent of the sector given that it was not possible to contact all sector businesses.

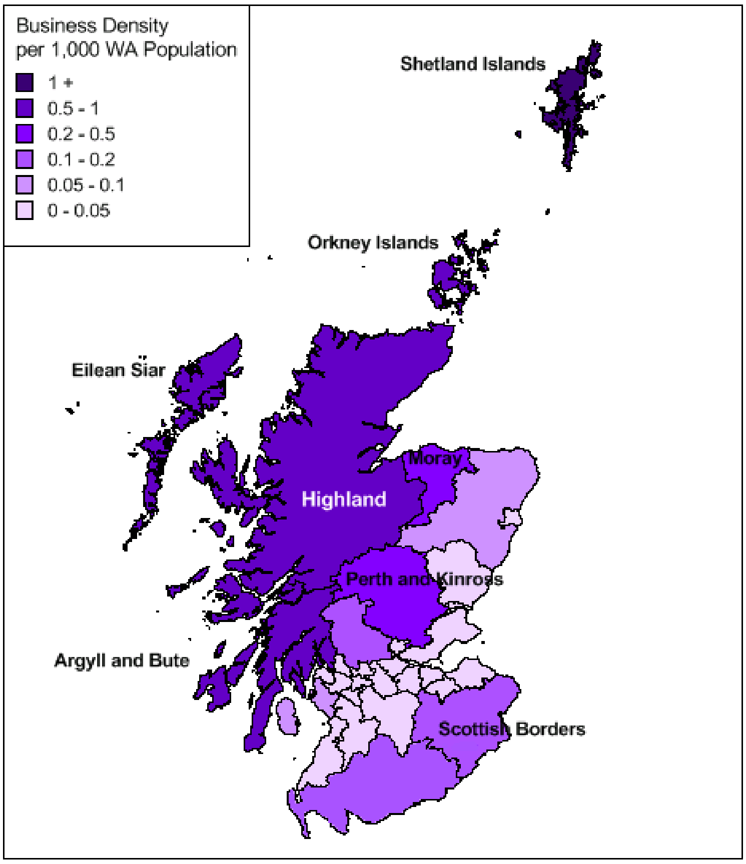
## Location of AT Businesses

4.5 More than a third of AT businesses are located in the Highland Council area, followed by 12% in Argyll and Bute and 8% in Perth and Kinross. These three areas account for more than half of AT businesses in the sector. Where a figure of zero is recorded, no AT businesses were identified in these local authorities through the research.

[20] Please note, the findings in this chapter are based on the Mapping Database, compiled using a mixture of desk research and business proformas (either completed by telephone or online). The 'n' figures represent the number of businesses for which information was available for each criteria/ question.

| Table 4.1: Location of AT Businesses | | | | | |
|---|---|---|---|---|---|
| **Local Authority** | **%** | **Number** | **Local Authority** | **%** | **Number** |
| Highland | 35% | 115 | Angus | 1% | 3 |
| Argyll and Bute | 12% | 40 | East Lothian | 1% | 3 |
| Perth and Kinross | 8% | 26 | Falkirk | 1% | 3 |
| Shetland Isles | 6% | 19 | South Lanarkshire | 1% | 3 |
| Edinburgh | 4% | 14 | West Lothian | 1% | 3 |
| Moray | 4% | 14 | Dundee | 1% | 2 |
| Comhairle nan Eilean Siar | 3% | 11 | Inverclyde | 1% | 2 |
| Aberdeenshire | 3% | 11 | Renfrewshire | 1% | 2 |
| North Ayrshire | 2% | 8 | South Ayrshire | 1% | 2 |
| Scottish Borders | 2% | 8 | Midlothian | 0% | 1 |
| Dumfries and Galloway | 2% | 7 | North Lanarkshire | 0% | 1 |
| Orkney | 2% | 7 | Clackmannanshire | 0% | 0 |
| Stirling | 2% | 7 | East Ayrshire | 0% | 0 |
| Fife | 2% | 6 | East Dunbartonshire | 0% | 0 |
| Glasgow | 2% | 5 | East Renfrewshire | 0% | 0 |
| Aberdeen City | 1% | 3 | West Dunbartonshire | 0% | 0 |
| *Source: ekosgen Mapping Database, n=325* | | | | | |

4.6 Expressed as a proportion of the working age population (WAP), the highest concentrations of AT businesses are across the Highlands and Islands region (with business density above 0.5 in all H&I areas bar Moray). Moray and Perth and Kinross have the next highest concentrations, along with Borders, Dumfries and Galloway and Stirling. Unsurprisingly, these are the more rural parts of Scotland, with AT businesses tending to be clustered around rural population settlements.




Source: ekosgen Adventure Tourism business database and the Annual Population Survey.

## AT Businesses by Type

4.7 The majority of AT businesses in Scotland are activity and experience providers, with 84% of businesses describing themselves this way (businesses were able to state whether they were one or more type of business). Around a quarter are activity centres and attractions, while a far smaller proportion of businesses are tour operators (just 5% have been identified in Scotland). Tour Operators have quite different characteristics from attractions or experience providers – for example there is legislation that governs operators in terms of their responsibilities.

| **Table 4.2: Type of AT Business** | | |
|---|---|---|
| **Type** | **Number** | **Proportion of all AT businesses** |
| Activity and Experience Providers | 264 | 84% |
| Activity Centres and Attractions | 74 | 24% |
| Adventure Travel Tour Operator | 16 | 5% |
| *Source: ekosgen Mapping Database, grossed up to the full number of businesses based on n=313. Please note, percentages do not sum as businesses could be classified as more than one business type* | | |

4.8 In all, 54 businesses described themselves as more than one business type. Of these:

- 44 businesses described themselves as both an Activity and Experience Provider and an Activity Centre and Attraction;
- Eight described themselves as both an Adventure Travel Tour Operator and Activity and Experience Provider; and
- Two described themselves as all three business types.

## Scale of the AT Sector: Employment, Turnover and Future Growth

4.9 Overall, the estimated employment in the sector, expressed in Full Time Equivalents (FTE's), is around 3,000. This has been calculated by combining current employment figures for all mapping database businesses, equating any part time roles to be 0.5 FTE. This figure (1,662) was then grossed up to the full population of AT businesses. Contractors, freelancers and zero-hour contracts have been excluded. This is a significant baseline employment level. At 2,948 FTE across Scotland, this places the sector alongside the manufacturing of pharmaceutical products, (3,100), the manufacturing of wearing apparel (2,900) and information service activities (2,300)[21] for example.

| **Table 4.3: Current Employment (FTE's)** | |
|---|---|
| Database sample (n=198) | 1,662 |
| Business average | 8.4 |
| **Full sector (n=351)** | **2,948** |
| *Source: ekosgen Mapping Database, n=213.* | |

4.10 There are seasonal variations, but not significantly so. The estimated summer employment levels rise by 6% and winter employment levels fall by 12%. By sub-sectoral activity, there is only significant employment variation between peak and off-peak seasons for the wildlife/ nature watching (35% difference) and walking/ climbing (27%) sub-sectors. This illustrates year-round activity for the majority of the AT sector.

[21] Business Register and Employment Survey (2013).

| Table 4.4: Seasonal Employment Variations (FTE's) | | | |
|---|---|---|---|
| Summer[22] | | Winter[23] | |
| Database sample (n=199) | 1,765 | Database sample (n=189) | 1,396 |
| Business average | 8.9 | Business average | 7.4 |
| **Full sector (n=351)** | **3,124** | **Full sector (n=351)** | **2,597** |
| *Source: ekosgen Mapping Database, n=213.* | | | |

### Turnover

4.11 Annual turnover – a proxy for sales in the sector – is estimated at £142.4m, as shown at Table 4.5 overleaf. This is an average of just over £400,000 per business. However, the sector is dominated by smaller businesses achieving a turnover of under £100,000 – the median turnover figure is £63,000.

4.12 Turnover varies widely by type of AT business. Tour operators achieve the largest average turnover, at just under £1.27m. Activity centres and attractions turn over just under £700,000 on average, with a small number of very large centres turning over well in excess of £2m. The average turnover figure for activity and experience providers is more moderate, at around £175,000.

| Table 4.5: Sector Turnover | |
|---|---|
| Database sample (n=128) | £52.0m |
| Business average | £406,000 |
| Median | £63,000 |
| **Full sector (n=351)** | **£142.4m** |
| *Source: ekosgen Mapping Database, n=213.* | |

| Table 4.6: Turnover by Business Type | | | |
|---|---|---|---|
| | **Adventure Travel Tour Operators (n=10)** | **Activity and Experience Providers (n=103)** | **Activity Centres and Attractions (n=25)** |
| Business average | £1,270,000 | £175,000 | £700,000 |
| Median | £465,000 | £60,000 | £170,000 |
| *Source: ekosgen Mapping Database* | | | |

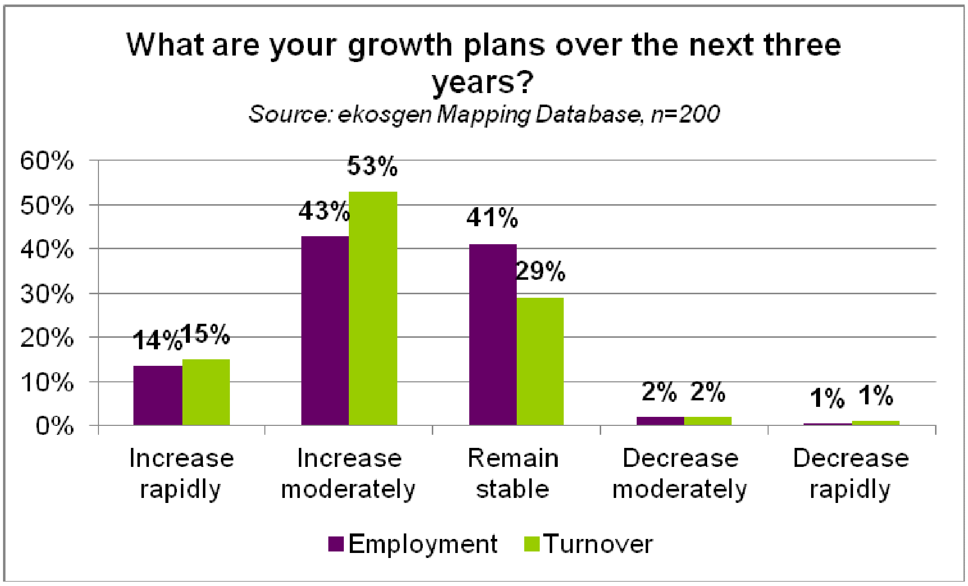
### Growth Plans

4.13 There are high levels of optimism for future business performance within the sector. In all, over two thirds of AT businesses (68%) are looking to expand their turnover in the near future, most of whom expect it to grow moderately, with just 3% expecting sales to drop.

4.14 AT businesses are slightly less optimistic about increasing employment, although over half (57%) do plan to expand employment over the next three years. Again, just 3% of businesses are expecting employment to contract over this time.

[22] Summer = June to August
[23] Winter = December to February

*Figure 4.1*




## Nature and Sphere of Operation

4.15 Based on the completed business proformas, 45% of businesses classified themselves as a private company, either limited by guarantee or otherwise. 26% are sole traders and 4% are social enterprises. Of the 24% who classify themselves as 'other', the vast majority of these were charities, partnerships or, in a very small number of cases, part public sector-supported organisations.

4.16 Businesses range in size; a quarter of the sector are sole traders (26%), although this is likely to under-estimate the number of self-employed persons in the sector. Nearly seven in ten AT businesses are small (employing between 1 and 49 FTE staff). A small number are medium (4%) and only 1% are large.

| **Table 4.7: AT Business Size Band** | |
|---|---|
| Sole Trader | 26% |
| Small (1-49 FTEs) | 69% |
| Medium (50-249 FTEs) | 4% |
| Large (250+ FTEs) | 1% |
| *Source: ekosgen Mapping Database, n=213.* | |

4.17 AT businesses in Scotland typically operate locally or regionally in terms of their geographical sphere of operation. In all, just under half (47%) deliver their activities locally, and a further third (32%) operate regionally. Around 7% operate across Scotland and 1% operates across the UK. Around 1 in 8 (13%) operate internationally, although few of these regularly offer activities and tours outside the UK; rather many of these may offer one or two overseas trips per year as part of their business operations.

4.18 Businesses that operate internationally were asked 'in what locations do you deliver AT activities and services?' The Alps/Canada are most common for snow sports while Norway and Canada are popular destinations for river activities (kayaking) and climbing, and Ireland for sailing. Other international destinations tended to be Europe (Spain, France, and Italy).

| Table 4.8: Location of AT Activities/Services Delivered | | | | |
|---|---|---|---|---|
| | Total (n=260) | Tour Operators (n=15) | Activity and Experience Providers (n=206) | Activity Centres and Attractions (n=63) |
| Locally | 47% | 13% | 45% | 59% |
| Regionally | 32% | 27% | 35% | 25% |
| Scotland wide | 7% | 7% | 6% | 6% |
| UK wide | 1% | 7% | 1% | 2% |
| Internationally | 13% | 47% | 13% | 8% |
| *Source: ekosgen Mapping Database, n=213.* | | | | |

4.19 By contrast to the activity/experience providers and centres/attractions, half of the tour operators deliver activity internationally as well as across Scotland. Some eight in ten activity/experience providers deliver activity either locally or regionally and well over half (59%) of activity centres/attractions deliver their AT activities locally.

**Promotional Activity**

4.20 The vast majority of businesses surveyed – some 98% - have some form of website. However, it is acknowledged that this may overstate the actual proportion since a number of databases accessed for the study were online databases, and so the data collected may be skewed slightly i.e. those without a website are typically harder to identify. The high proportion of businesses having a website also provides no information on the quality of the website presence. Nevertheless, HIE's (2015) Digital Economy research[24] found that for the HIE area businesses in the sustainable tourism sector were *"more likely than average to have a company website (87%)…more likely than average to say that their website plays a central role in their business (65%)* [and] *generally more likely to report an intention to upgrade their internet connection (30%),"* suggesting a recognition of the importance of at least a basic awareness of the benefits of digital technology.[25]

4.21 The research highlighted that less than half of AT businesses in Scotland sell their products or services online, and so less than half enable online booking. This highlights that improving online booking capability within the sector is a key opportunity for Scotland, with some evidence suggesting it currently compares poorly with other benchmark countries, as discussed in Chapter Six. The proportion is almost certainly increasing, and existing and new enterprise agency programmes that support tourism businesses in the adoption and use of digital technologies, such as the new Digital Tourism Scotland Programme, are crucial in this regard.[26] Nevertheless, more can and should be done to ensure more businesses can and do sell online. As expected, a much higher proportion (86%) of tour operators surveyed sell their services online, as this is essential for their business, whereas there was no difference between the activity and experience providers and centres and attractions.

4.22 Around a quarter (24%) of businesses surveyed in the sector have a physical presence in the form of a retail outlet; clearly this extends to the majority of centres and attractions.

4.23 Encouragingly, 84% of the businesses surveyed use social media to promote their business, although again this does not provide comment on the extent or quality of this

[24] Please note that growth sector level data is not yet available for the comparable national Digital Scotland study.
[25] Highlands and Islands Enterprise (2015) *Digital Scotland: Highlands and Islands Research*.
[26] http://www.hie.co.uk/growth-sectors/tourism/digital-technology/digital-tourism-pilot.html

medium in selling the service/product. Facebook is most commonly used, followed by Twitter, then others such as LinkedIn, YouTube, Pinterest, Instagram and Vimeo.

| **Table 4.9: Promotional Activity** | |
|---|---|
| Have a website | 98% |
| Use social media | 84% |
| Sell its products and services online | 42% |
| Have a retail outlet selling products and services to customers | 24% |
| *Source: ekosgen Mapping Database, n=213.* | |

## AT Activity by Sub-Sector

4.24 The importance of the marine and coastal environment in the AT sector is clearly shown, with 44% of AT sector businesses offering some form of marine-related activities. In all, 30% of businesses offer river activities/experiences. The importance of walking and climbing is also underlined, with 43% of businesses active in this sub-sector, of which 'soft adventure' will be an important part. Further, almost four in 10 businesses provide cycling or biking activities, again demonstrating the breadth of the appeal of cycling beyond mountain biking alone. More than a third of businesses offer wildlife watching. There is an extremely wide range of other (often non-AT) activities offered by AT businesses, including archery, 4x4 vehicle and motorcycle tours, camping/ bushcraft, fishing, horse riding/ pony trekking, rafting, paintballing, quad-biking and rope courses.

4.25 What is clear is that the AT offer in Scotland is broad and extensive. As shown in Table 4.10 overleaf, the 351 businesses responding identify 810 sub-sector activities, a ratio of 1:2.6, with many offering two or more activities. Further, the majority of these activities will be available to customers within a very local area.

| **Table 4.10: Type of AT Activity** | | |
|---|---|---|
| **Sub-Sector** | **Number** | **Proportion** |
| Marine and coastal | 154 | 44% |
| Walking/ climbing | 149 | 43% |
| Cycling/ biking | 134 | 39% |
| Wildlife watching | 124 | 36% |
| River | 103 | 30% |
| Snow | 61 | 17% |
| Other | 85 | 24% |
| *Source: ekosgen Mapping Database, n=305.* | | |

### Clustering of Activity by Sub-Sector

4.26 The mapping by sub-sector above relates to the identifiable adventure and outdoor recreation sub-sector activities in Scotland in which people are able to participate, although there are a couple of important cross-cutting segmentations. The principal cluster groups are largely commensurate with the breakdown of activities suggested by Paul Easto and Caroline Warburton in their 2010 report for the Tourism Innovation Group (TIG), and can be identified as:

- Snowsports – skiing and snowboarding, plus cross-country skiing, snowshoeing and ice climbing;
- River-based activities – canoeing and kayaking for example;
- Coastal and marine activities – such as sailing, sea kayaking and surfing;
- Mountain biking and cycling – including cycle touring;
- Hiking and walking – include long-distance trails and treks;

- Climbing and mountaineering – as differentiated from slower adventure walking;
- Wildlife watching – both land- and water-based.

4.27 Other reports have clustered walking and climbing together; the segmentation here in this review, however, recognises the fundamental differences in technical difficulty, expertise required and motivations for participating in hiking/ walking and climbing/ mountaineering.

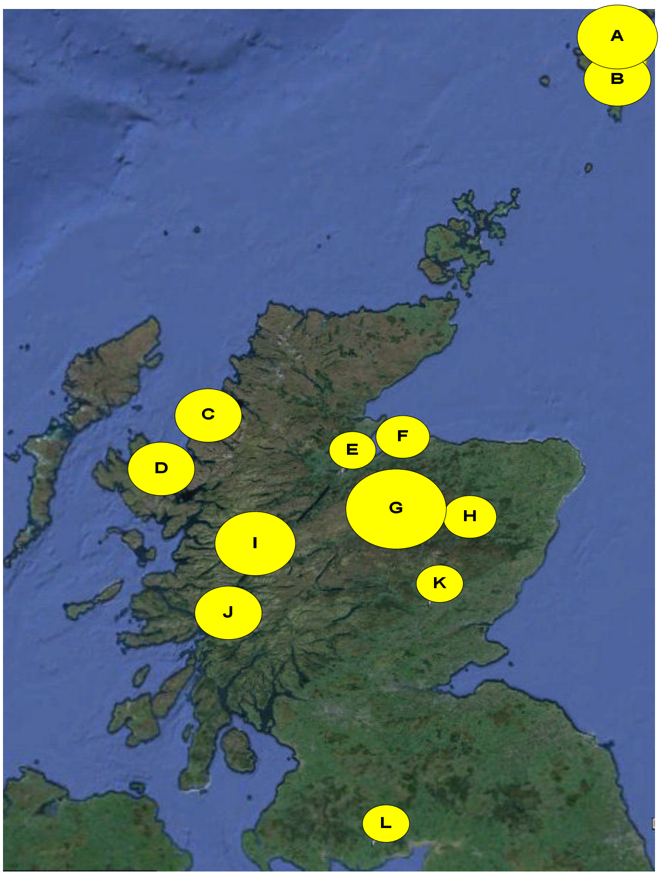
4.28 The value of many of these sub-sectors to the Scottish economy and job market has been discussed already, in Chapter 3, along with the important role they play in helping to deliver the Tourism Scotland 2020 strategy. Coastal/marine activities, walking and wildlife watching are particularly widespread activities and some (e.g. snowsports) have high levels of spend per person.

4.29 In addition, and as alluded to in the TIG report, there is a further category of activity which includes a wide range of *commercially-operated, high-adrenalin pursuits*, such as bungee jumping at Killiecrankie, via ferrata at Kinlochleven, canyoning near Ullapool and whitewater rafting at Invergarry. This is a growing market segment, with experiences which are often captured by operators and clients on film and offer highly 'tweetable' or 'postable' social capital, both verbal and visual. Although some of these activities also belong to the aforementioned sub-sectors, their nature, offering consumers accessible thrills in the hands of professionals, suggests a categorisation of their own.

4.30 Even more importantly, there is a significant and hugely-popular outdoor activity sector that offers great scope for further growth: simple, *nature-based family activities*, such as picnicking and easy walks and cycle rides with children, that are not high-adrenaline or exciting, but which are family-orientated and highly accessible to most of the population. Rothiemurchus Estate near Aviemore is a good example of a centre that is trying to cater to this market. In addition to a wide range of guided pursuits available through its website, it offers a network of easy, waymarked walking and cycling routes through the forest, and a range of eating, shopping and camping/lodging options. With its 'centrepiece' Loch an Eilein, previously voted 'Britain's best picnic spot', it has consequently developed a good reputation as a family-friendly and accessible destination, and successfully promotes itself as such. It is important to note, however, that these activities are, in the main, free activities. While they may not directly contribute to the economy, the participants are likely to extend their stay or buy refreshments etc., having a positive impact on the wider economy.

## Geographic Clusters of AT Activity

**Figure 4.2: Clusters of AT Business**




**Key**

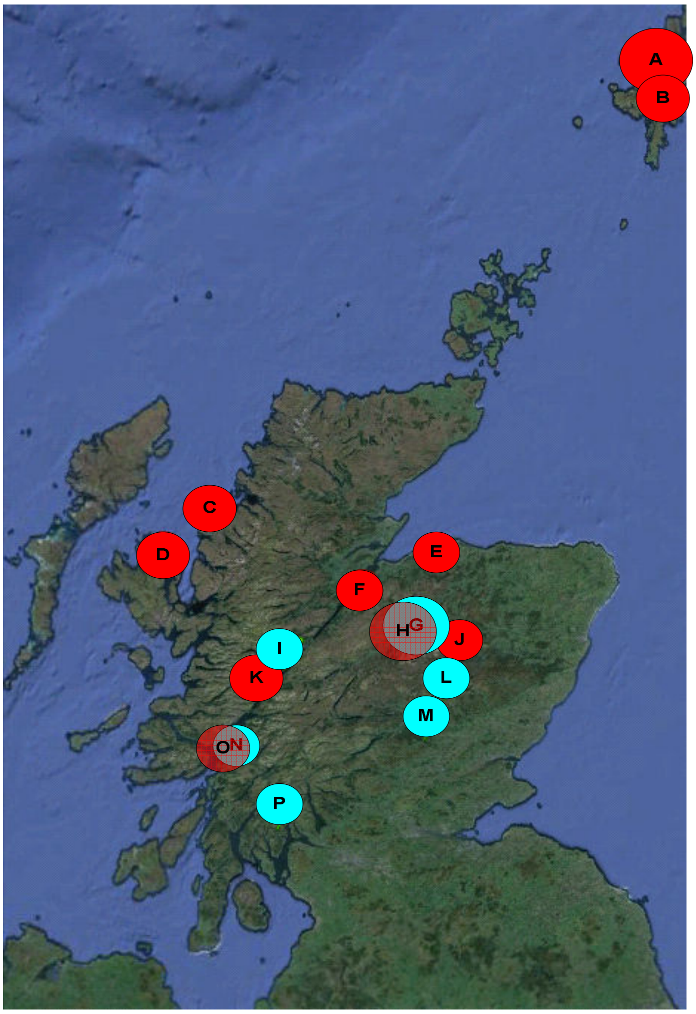
| |
|---|
| A = Shetland (mainland) (11) |
| B = Lerwick (8) |
| C = Gairloch (8) |
| D = Portree (8) |
| E = Inverness East (5) |
| F = Forres (6) |
| G = Aviemore (15) |
| H = Ballater (6) |
| I = Fort William (11) |
| J = Oban (9) |
| K = Blairgowrie (5) |
| L = Castle Douglas (5) |

4.31 The map shows the 12 more readily identifiable geographic clusters of AT businesses in Scotland, based on the mapping database. Here a cluster is defined as five or more AT businesses within the same postcode (e.g. PH22 for Aviemore). Eight of these are located in the Highlands and Islands, with none in the Central Belt of Scotland. The size of the circle denotes the size of the cluster (a larger circle means a larger cluster), with the largest cluster by far located at Aviemore.

4.32 Some areas of activity occurred in fairly close geographical proximity, although they incorporated more than one postcode. As such, they are not included in the clusters map. A clear example of this is postcodes PH15 and 16, which, if grouped, would identify the Aberfeldy area, in Perth and Kinross, as a clear cluster. This may also extend to other geographic areas.

4.33 The mapping broadly correlates to what are understood to be the geographic clusters of activity, although geographic clustering can vary from those locations offering a broad range of activities (e.g. Fort William and Aviemore), to those that are particularly strong in one or two sub-sectors (e.g. Gairloch), and those that offer something slightly different in flavour or feel (e.g. Portree).

**Figure 4.3: Clusters of activity/experience providers and centres and attractions**




**Key**

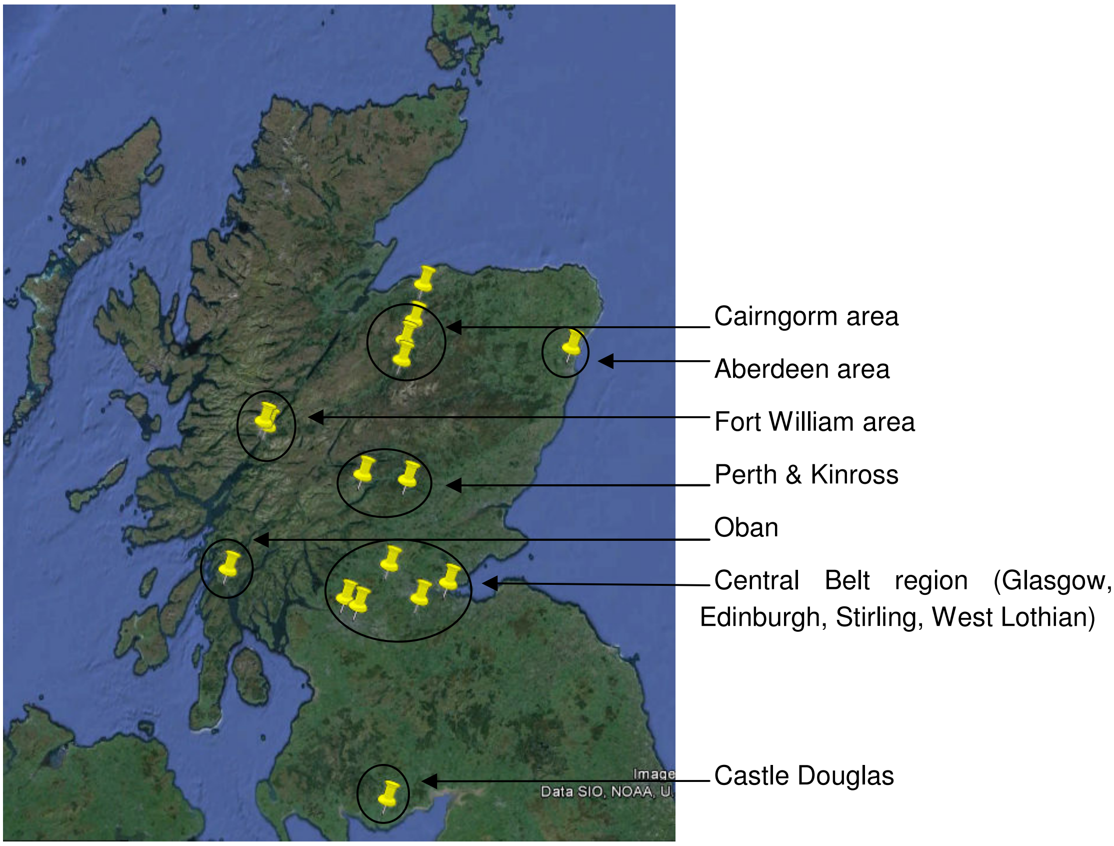
| |
|---|
| A = Shetland (mainland) (10) |
| B = Lerwick (8) |
| C = Gairloch (8) |
| D = Portree (8) |
| E = Forres (5) |
| F = Inverness East (5) |
| G, H = Aviemore area (15, 9) |
| I = Spean Bridge (3) |
| J = Ballater (6) |
| K = Fort William (8) |
| L = Blairgowrie area (4) |
| M = Dunkeld area (3) |
| N, O = Oban (3, 8) |
| P = Dunoon area (3) |

Red/dark shading = activity/ experience providers; Blue/light shading = centres and attractions

4.34 Clusters are broken down by the three types of AT businesses. The map at Figure 4.2 shows clusters of activity/experience providers (here defined as **five** or more businesses within the same postcode/ group of postcodes) in red and AT centres and attractions (**three** or more businesses within the same postcode/ group of postcodes) in blue. Again, the size of the circle denotes the size of the cluster. Most of the clusters are the same as the previous map, with significant groupings at Shetland, Aviemore, Fort William and Oban. Additional clusters include Spean Bridge, the Dunkeld area and the Dunoon area. Again, the majority of clusters (11 of 14) are located within the Highlands and Islands area.

4.35 Due to the small number of tour operators (16) identified in the study, we have highlighted each tour operator on the map below. Compared to the activity/experience providers and centres/attractions, tour operator businesses tend to be located more towards the Central Belt of Scotland, with a number in and around cities such as Glasgow, Edinburgh and Aberdeen i.e. closer to the source of consumers or to access points such as airports/ train stations etc. than to the location of the product/offer.

**Figure 4.4: Location of AT Tour Operators in Scotland**




4.36 The following section provides more detailed analysis of some of the key Scottish geographies identified in the business mapping clusters analysis. It is recognised that the business mapping above is not a complete mapping of the sector; there were fewer responses to the survey from some parts of Scotland. Further, the mapping based on concentrations of businesses by postcode does not always reflect clustering of activity at a lower density. The following qualitative analysis of clusters of activity seeks to address some of these limitations. As such some of the clusters identified below are not picked up by the mapping exercise.

**Fort William**

4.37 Fort William, as the self-proclaimed Outdoor Capital of the UK, is a natural place to start in terms of geographic clusters of AT businesses in Scotland. Along with Aviemore (see below) it is the most recognisable 'outdoor' centre in Scotland, and whilst Aviemore has more AT businesses, Fort William offers perhaps the greatest range and breadth of offer. As well as having a strong brand and sitting in a location that offers a coastline, forests and the UK's highest mountain close by, the range of activities it offers is a certain strength (see Appendix H for more details). The benchmarking exercise in Chapter Six confirms the wide variety of outdoor activities that can be undertaken; these can be both autonomous in participation, such as climbing, snowsports and mountain biking; and commercialised adventure activities, ranging from sea kayaking and whitewater rafting to via ferrata and canyoning. It is also host to a broad spectrum of organised events, of which the Mountain Bike World Cup and Scottish Six Day Trials are the most well-known.

4.38 These premier events and the variety of landscapes locally are two of the factors that set Fort William apart from Scotland's other premier outdoor hub, Aviemore. High profile events bring significant additional economic activity to the area and act as a showcase for the AT sector.

**Aviemore**

4.39 Aviemore also offers a similar spread of commercial and autonomous activities as Fort William and has a busier year-round adventure product. It has a dramatic setting and in the Cairngorms National Park the next highest mountains in Scotland. Aviemore possesses first-class snowsports activities, along with an extensive walking, cycling and wildlife watching offer. It benefits from having a family-accessible terrain and setting, and an arguably more attractive centre with a stronger 'alpine' feel. Very importantly, it is rather more accessible than Fort William, by dint of its location on the A9 and a much faster rail link, putting Inverness and Central Belt consumers (and visitors through their airports) within easier reach. It is also host to the national outdoor centre at Glenmore Lodge.

4.40 It is argued that Fort William and Aviemore stand apart in terms of the sheer variety of adventure activities they offer, all year round, as well as their reputation and image. The use of the two locations in terms of promotion and national-level marketing of the sector is therefore important.

**Oban**

4.41 Oban is a growing AT cluster, with a relatively accessible location, being on a rail line (with an improved rail service to Glasgow) and geographically nearer to the Central Belt than Fort William. As well as being the gateway to some of the popular islands, including Mull in particular for wildlife watching, Oban itself has a range of AT product offerings. It has an attractive and challenging hiking terrain within easy reach, and is becoming particularly well known as a centre for coastal and marine activities, including sailing, sea kayaking and wildlife watching.

**Peebles**

4.42 South of the Central Belt, although it does not feature on the formal mapping of businesses, Peebles is worth mentioning. Reputation is largely predicated upon a single adventure sub-sector: mountain biking, with day trips more common than overnight stays. With both the Innerleithen and, more importantly, Glentress purpose-built 7Stanes trail centres on its doorstep, the importance of mountain biking to the centre cannot be overstated. Glentress is widely viewed as the 'jewel in the crown' of Scottish mountain biking and even as far back as 2005 was attracting over 150,000 mountain bikers each year (and over 88,000 cars into the car park in 2011, albeit for a range of activities, of which mountain biking is nonetheless by far the most popular); the proximity of Glasgow, and especially Edinburgh, has undoubtedly played a large part in this popularity. While it offers a few opportunities for other outdoor activities, Peebles is too centred on one activity to be considered a true cluster.

**Braemar, Ballater and the wider Deeside Area**

4.43 In a similar vein, while offering skiing nearby at Glenshee, a few wilder mountain biking routes, up Mount Keen for example, and some commercial activity, such as gorge walking, Braemar (and the wider Deeside area including Ballater which features on the mapping of businesses) is best-known as the eastern gateway to the Cairngorms and the hiking, wild camping and climbing possibilities that they offer. As such, it is considered a cluster of AT activity.

**Aberfeldy and Blairgowrie, Perthshire**

4.44 Aberfeldy is a destination that is becoming increasingly well-known for the range of adventure activities it offers. Well sited, not far from the A9, and easily accessible from Perth, Dundee and the Central Belt, it is arguably not instantly recognised as a premier Scottish outdoor hub, having been most well-known as a base to explore some of its neighbouring Munros (Ben Lawers and Schiehallion, in particular). Today, however there are a growing number of commercial operators offering a wide range of outdoor activities, from canoeing on Loch Tay to walking, cycling and mountain safaris. If in terms of nothing more than this breadth of activity, Aberfeldy and nearby Ballinluig and Killiecrankie businesses warrants its status as an outdoor hub. Blairgowrie, identified through the mapping of businesses, is also an important access point for the surrounding area.

**Ullapool**

4.45 As the gateway to the north-west, and indeed the only centre of any size in the area, Ullapool offers a different 'feel' and 'pace' to the other centres discussed. More traditionally known as a base from which to explore the mountains of the north-west (An Teallach most famously), for its links to the Outer Hebrides and the Summer Isles, and for its fishing and stalking possibilities, it is becoming known for its marine and coastal activities, including wildlife watching, boat trips and sea kayaking. A small number of operators offer guided activities in the areas, including canyoning and the aforementioned coastal pursuits. While its relative inaccessibility limits its audience, this remoteness, coupled with the wildness of its coastline, the strong cultural traditions and the outdoor possibilities, means that it is a draw to many potential consumers. This region may be said to embody a similar offer to the Isle of Skye (see below), as it is the remote, wild beauty offer (rather than the frenetic activities of a cluster of adventure companies) that define its appeal.

**Portree, The Isle of Skye**

4.46 Unlike other clusters mentioned, a different approach to the notion of adventure tourism is evident when looking at the Isle of Skye. The island arguably offers something different, in terms of being generally well-known for its scenery and historical and cultural traditions, as well as the climbing and mountaineering possibilities on the Cuillin, the Quiraing and the Old Man of Storr, among others. In outdoor circles these mountains are legendary and a draw in their own right. Without a real outdoor 'hub' as such, although Portree as the largest settlement is home to a number of AT businesses, the island nonetheless is becoming increasingly well known for mountain biking and cycle tourism, sea kayaking and wildlife watching. Combined with the romantic appeal of its island setting, its departure point for the Outer Hebrides and its almost mythical 'folklore' status, Skye can be identified as a less conventional outdoor cluster.

## Summary

4.47 The scale of the sector is significant, in both employment terms and in terms of the annual turnover of businesses, which will in turn contribute to Gross Value Added for the economy. At least 3,000 FTE are directly employed in the AT sector across nearly 350 businesses, generating an annual turnover in excess of £140m. These are the economic benefits of the sector which does not take into account the wider supply chain multipliers.

4.48 There are clear geographic clusters of activity, some of which are areas popular for AT activities and experiences, others which are destinations with a range of AT provision. Whilst this clustering of businesses is evident, there are other popular areas for one or two activities (e.g. Peebles for mountain biking) where there is a concentration of a single activity rather than a cluster of activities shown through the business mapping. As Chapter 5 illustrates, often it is the wider geographic area or destination that is a stronger motivator for the customer, rather than the activity itself which can be a secondary factor.

# 5 How does the AT Sector in Scotland work?

## Introduction

5.1 This chapter explores the nature of the AT sector in more depth, looking at the range of activities, products and services, customer bases, the relationships between AT businesses including those from different sub-sectors, as well as collaborative activity. The chapter builds on information gathered in the short business proformas which formed the basis of the mapping exercise and draws on more than 70 in-depth telephone interviews with AT businesses. These interviews explored how the sector operates in practice and sought to understand the challenges and opportunities they face. Findings for activity/ experience providers and centres/ attractions are presented first, with tour operators reported upon separately.

5.2 In all, 71 in-depth interviews were conducted with AT businesses, representing 20% of the entire mapping database of 351 businesses. The businesses were sampled to ensure representation in terms of sub-sectors and locations. The breakdown of respondents by business type is provided in the table below.

**Table 5.1: Study Survey Sample**

| | Total No. (mapping) | Percentage | Survey sample no. | Percentage |
|---|---|---|---|---|
| Activity and Experience Providers | 267 | 84% | 54 | 76% |
| Activity Centres and Attractions | 74 | 24% | 22 | 31% |
| Adventure Travel Tour Operators | 16 | 5% | 7 | 10% |
| Total no. of entries/ responses | 351 | | 71 | - |

*Source: ekosgen, Mapping Database (2014/ 2015) and In-depth Business Interviews (2014/15)*
*Please note, businesses can be coded as more than one type, thus percentages may add to more than 100.*

5.3 Businesses sampled for the in-depth telephone interviews were located mainly in the Cairngorms National Park Area, followed by Argyll and the Islands and Tayside (Angus, Perth and Dundee), and Lochaber, Skye and Wester Ross. Overall, this is broadly representative of the wider mapping database (although the overall base slightly under-represents certain areas such as Dumfries and Galloway).

## Activity and Experience Providers and Activity Centres/ Attractions

### Business Activity

5.4 Activity/experience providers and centres/attractions offer a range of different products and services, as demonstrated in Table 5.2 overleaf. Activity provision is key for both business types (95% and 85% respectively).

5.5 Amongst activity/ experience providers, after the provision of the activity, the most common products/ services are guides (53%), equipment (42%), training (37%), transport (34%) and accommodation (32%). Activity/ experience providers are frequently offering guided activities and experiences, much of which will require some form of equipment made available to customers, and transport to/from the activity. Some also provide accommodation.

5.6 In contrast, centres/attractions have a much stronger training and educational offer. Most provide some form of equipment (77%), and almost half deliver personal development courses (46%). More than a third provide education services to local authorities or youth groups (38%). They also have a far stronger corporate dimension when compared to activity and experience providers, including corporate activities (38%), dining facilities (38%) (not just for business customers) and leisure services (38%).

| Table 5.2: Product and Service Offerings | | |
|---|---|---|
| **Business Activity** | **Activity/ experience providers (n=38)** | **Activity centres/ attractions (n=13)** |
| Activity Provision | 95% | 85% |
| Guides | 53% | 15% |
| Equipment | 42% | 77% |
| Training | 37% | 38% |
| Transport | 34% | 15% |
| Accommodation | 32% | 23% |
| Professional qualifications | 26% | 23% |
| Delivery of education services to local authorities | 26% | 38% |
| Dining facilities | 24% | 38% |
| Personal development | 24% | 46% |
| Delivery of education services to youth groups | 24% | 38% |
| Corporate activities | 18% | 38% |
| Leisure services | 18% | 38% |
| Other(s) | 34% | 8% |

*Source: ekosgen, In-depth Business Interviews, 2014/15*

5.7 Other products/services offered not identified above include *"book*[ing] *accommodation and baggage and taxi transfer for clients," "other courses"* and *"hen and stag dos, weddings," "permits, photographs," "rental, transfer services"* and *"retail services"*.

5.8 Businesses were asked to specify their three most popular activities/ experiences. As shown by the table below, the most popularly identified activities/ experiences/ attractions amongst in-depth business respondents are walking, kayaking, biking/ cycling, canoeing, and climbing. The popularity of walking trips reflects the widespread appeal of this activity across the sector, with 43% of AT businesses currently offering walking/climbing activities (see 4.27).

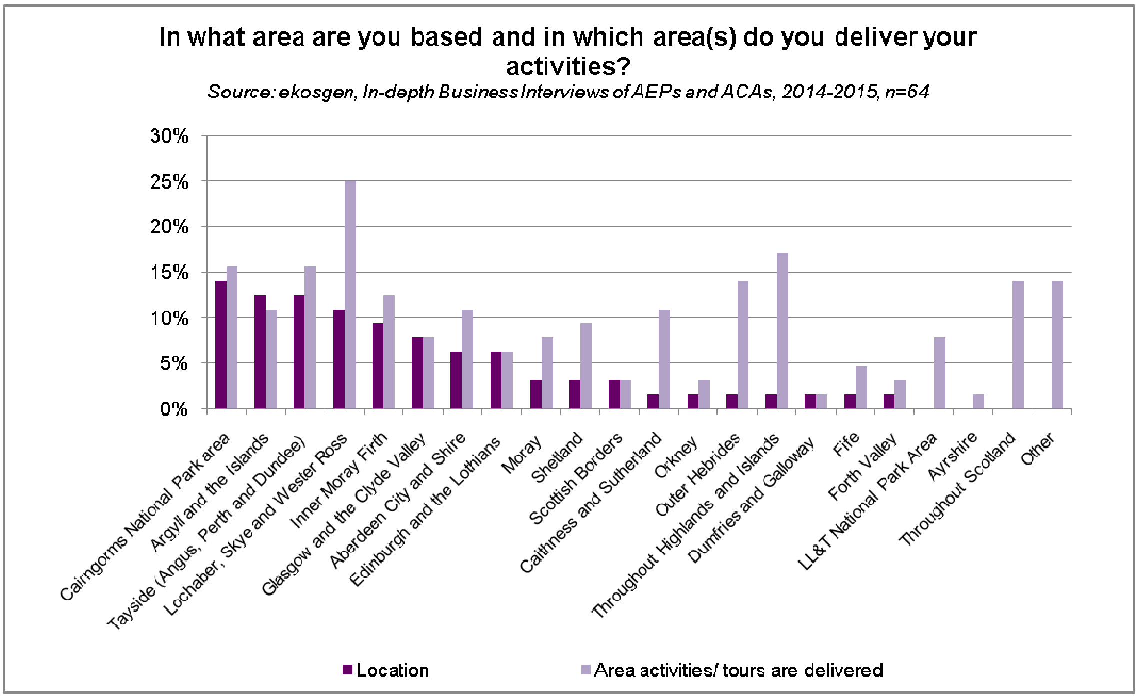
| Table 5.3: Most Popular Activities | | |
|---|---|---|
| **Ranking** | **Top Ten Most Popular Activities** | **%** |
| 1 | Walking | 10 |
| 2 | Kayaking | 7 |
| 3 | Biking/ cycling | 5 |
| 4 | Canoeing | 4 |
| 5 | Climbing | 4 |
| 6= | Mountain biking | 3 |
| 6= | Sailing | 3 |
| 8 | Skiing | 2 |
| 9= | Coasteering | 2 |
| 9= | Mountaineering | 2 |
| 9= | Surfing | 2 |

*Source: ekosgen, In-depth Business Interviews of Activity and Experience Providers and Activity Centres/ Attractions, 2014/15*

## Location

5.9 Activities are delivered in a range of locations across Scotland, although a number of clusters for activity delivery were evident in this sample. This included Lochaber, Skye and Wester Ross, followed by Tayside and the Cairngorms National Park Area, and the Inner Moray Firth. Amongst those surveyed in-depth, smaller but significant numbers of businesses were delivering activities in Argyll and the Islands, Aberdeen City and Aberdeenshire and Caithness and Sutherland.

***Figure 5.1***




5.10 Few respondents were able to comment on potential future clusters of activity. For those that gave specific suggestions these included Arrochar (for walking), Tayside and Fife, Fort Augustus/ Loch Ness/ Loch Lomond, Glentress, Oban (for paddling and free swimming) and the Borders and the north of Scotland (for safari).

5.11 Where comment was provided, there was an anticipated potential for further growth in urban areas: *"urban areas could be developed to attract local participation without the travel,"* and *"not sure but I think growth will be in cities e.g. segways* [although not covered by the AT definition] *in Glasgow are very popular."* One respondent commented that clusters could develop in a range of locations: *"all it needs is the potential for the activity, whether it is naturally created or man made. Generally it will require investment"*

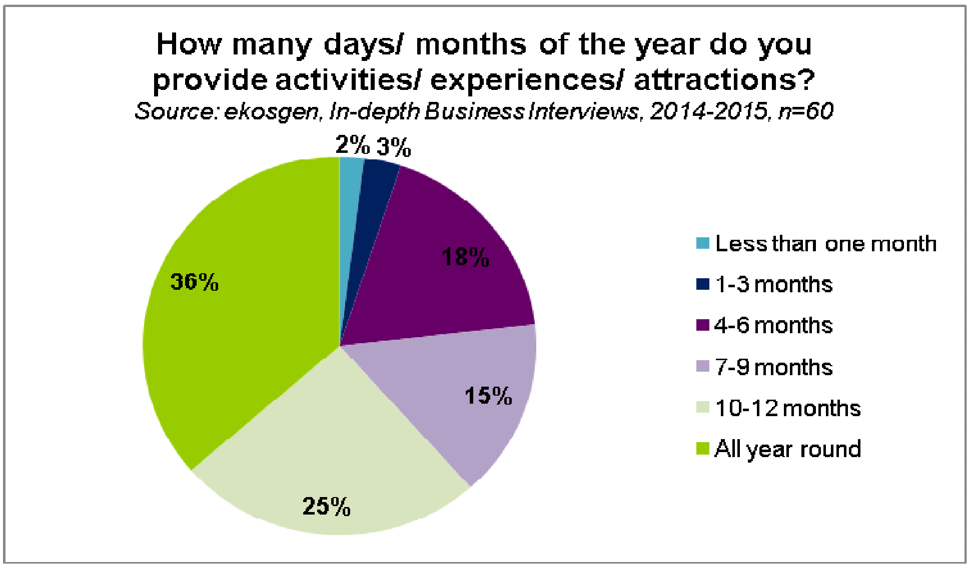
5.12 More than half did not see new geographic clusters of activity beyond those that exist at present, with many perceiving that the *"market is quite stable."* This is despite evidence of new emerging clusters, such as Oban (identified in Chapter 4), where there are growing and developing clusters of AT activity

**Seasonality**

5.13 Businesses are generally open for the majority of the year, although this may be at a reduced service, reflecting the seasonal employment variations for the wider mapping database in Chapter 4. Over one third (36%) are open all year round and a further quarter (25%) for 10-12 months. It is the smaller, sole traders or lifestyle businesses that typically operate shorter seasons, while the larger businesses are more likely to have diversified in order to operate longer seasons. This helps to explain the minimal impact that seasonality has on employment levels, as shown previously at Table 4.4.

5.14 Walking/climbing and cycling businesses tend to be least seasonal, and more likely to be open all year round. AT businesses offering river or marine activities are typically more seasonal, around one third of whom are open for nine months or less in the year. Snow sports are no more seasonal than the average, with around one fifth open for less than six months, given that sub-sector businesses are continuing to offer alternative activities during and away from the winter season. Wildlife/ nature watching businesses are currently the most seasonal, with almost half open for less than six months, partly related to the nature of the product, although more could be done in this sub-sector to reduce the extent of seasonality.

***Figure 5.2***




5.15 In discussing trends in seasonality, responses generally related to the weather conditions and demand for the services. Demand was generally highest in the spring/ summer months, with the exception of businesses offering snow activities.

5.16 Some businesses were mindful of particular services being more/less popular at different times of the year, or being heavily weather-dependent, and had diversified the business accordingly:

> *"Offer other activities in summer when snow is not there e.g. biking, hiking, climbing, chairlift, rides to keep open longer. Very dependent on the weather for snow activities"*

> *"More than 50% of business occurs during July and August, but with marketing campaigns carried out through deal sites….the season has been extended. Activities which are less weather sensitive have been developed to increase business levels throughout the shoulder months"*

> *"In winter, focuses on training courses. In summer, focuses on expeditions, particularly from March to October."*

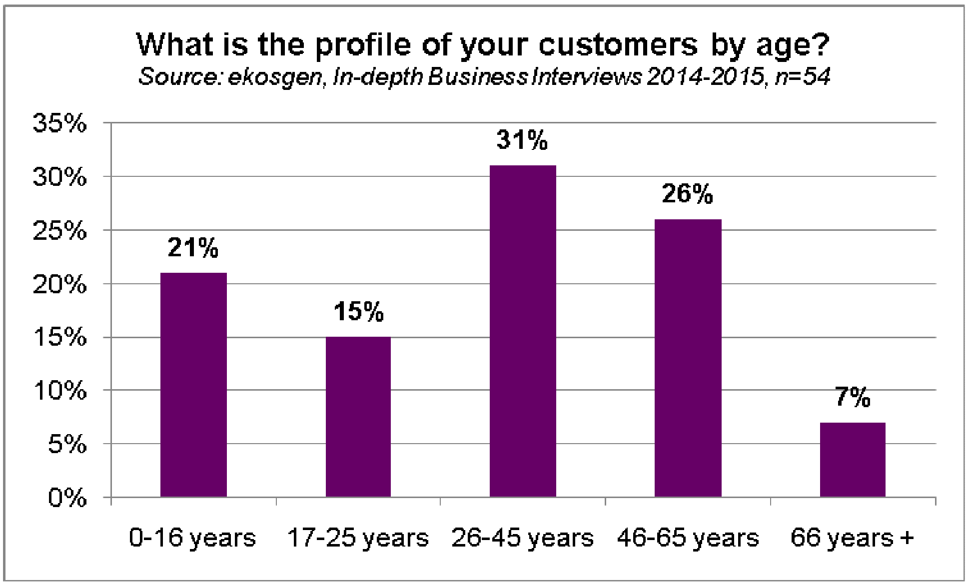
5.17 Of those who were not open all year round, the greatest number (nearly two thirds) stated that this was because weather conditions make opening challenging/ not possible and just over half stated that this was because demand is not there so it is not profitable for them to open. Weather conditions are more of a concern for activity/ experience providers than activity centres, whereas low demand was an equal concern for both business types. Some (17%) do not open due to personal reasons/ lifestyle choices.

5.18 By sub-sector, weather conditions are a greater consideration for businesses offering marine activities, wildlife and nature watching, and for snow activities. For cycling, where seasonal, this is more due to reduced demand, rather than weather conditions or lifestyle choices.

**Customer Profile**[27]

5.19 Across activity/experience providers and centres and attractions respondents, customers were spread relatively evenly by **age**. Roughly one third of customers are aged 25 and below, one third are in the 26-45 years' bracket and one third are aged 46 years and over. Activity centres and attractions have a much younger customer profile than activity/ experience providers, with over half of their customers aged 25 years and below – linked to the provision of school/education-related trips. Nearly four in ten activity/ experience provider customers are aged 46 and above, and these are the customers most likely to have the highest disposable income.

***Figure 5.3***




5.20 In terms of customers' **gender**, the services offered tend to be slightly more popular with males than females, with an average of 59% of customers being male and 41% being female.

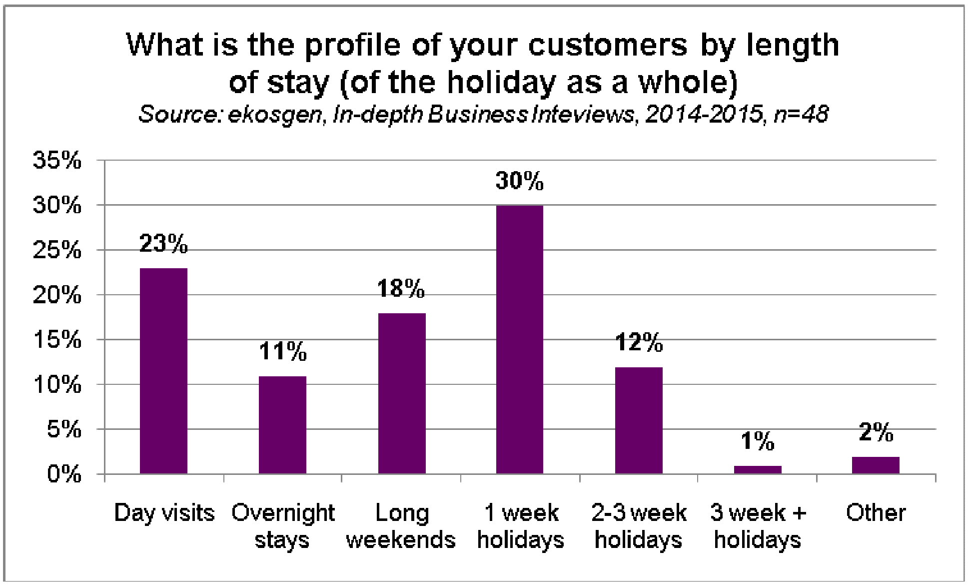
5.21 **Geographically**, the majority of customers are from within Scotland or the UK. In all, just over six in 10 (62%) are from Scotland, split local (22%), regional (18%) and rest of Scotland (22%). A quarter (25%) are from the rest of the UK. The remaining 14% AT customers are from outside the UK. Of the international AT visitors, an estimated 57% are from Europe (8% of the overall total), 29% are from North America (3% overall), 9% from Asia and 8% from South America.

5.22 More than a half of AT **customer types** (57%) are general tourists, 26% are identified as students/school children, 7% are corporate/business tourists and 5% are local residents. The remaining 14% are a range of other groups, including hen/stag parties, adult learning groups, council employees on training, families/couples and youth groups.

5.23 Around 43% of customers stay for at least a week. This includes 30% who stay for around a week, 12% who stay for two to three weeks and a small percentage (1%) who stay for three weeks or more. Shorter visits are more common for about three in 10 – 18% on long weekends and 11% for overnight visits. Just under a quarter (23%) are day-visitors.

[27] Please note, for this section, an estimated value was assigned to qualitative responses where precise values were not provided.

*Figure 5.4*



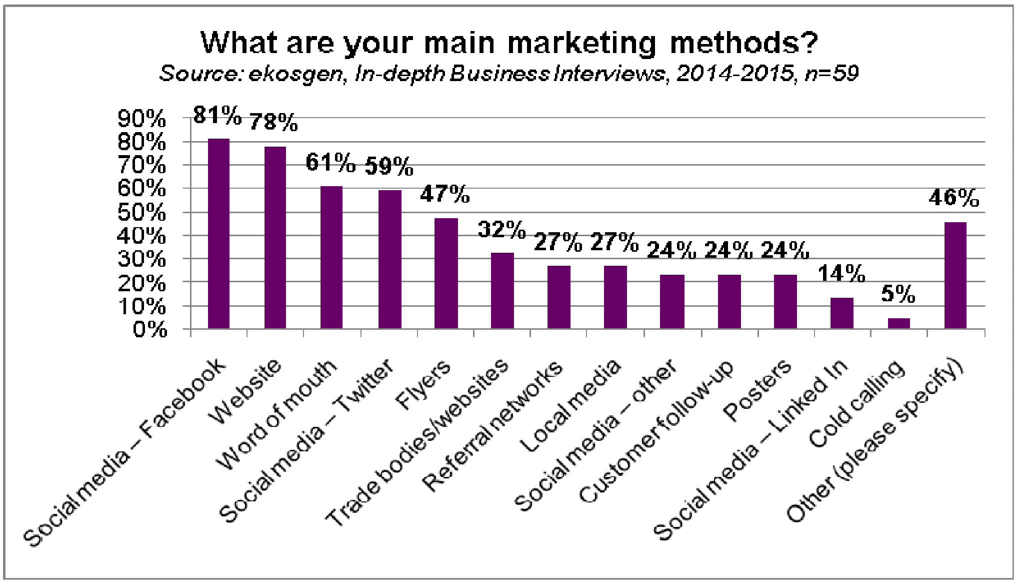

5.24 Nearly six in 10 respondents (58%) felt that their customers were motivated equally by both the activity and the location, while nearly a quarter (23%) thought the location was the main motivation, compared to 15% that considered the activity to be the motivating factor.

**Marketing Approaches**

5.25 Social media is a key marketing method within the industry. The in-depth interviews identified Facebook, websites and Twitter as main mediums for marketing. Over eight in ten activity/experience providers and centres and attractions used Facebook, while 78% used their website and 59% used Twitter. Six in ten (61%) use word of mouth, highlighting the importance of maintaining this form of communication.

5.26 Other forms of marketing (also including other forms of social media), included targeted emails, exhibiting at conferences, Google Ad-words, VisitScotland Guide 2015, local businesses e.g. B&Bs, Google Plus, promotional newsletters, Instagram, Pinterest, Vimeo, TripAdvisor, Guide Advisers, networking, PR activities, YouTube, TV, radio, magazine adverts and through collaborators' websites.

*Figure 5.5*



5.27 In keeping with the wider mapping database, the vast majority of activity/experience providers and centres and attractions have a website (96%). On average, businesses rated their website as 7.8 out of ten in terms of how essential it is to the business, highlighting the importance of having a web presence within the industry. This corroborates HIE's (2015) Digital Economy Research which found that sustainable tourism businesses as a whole were *"more likely than average to say that their website plays a central role in their business."*[28]

5.28 In all, nearly four in five businesses (78%) managed their website in-house, while 22% managed it externally, with little variation between activity/ experience providers and centres and attractions. Six in ten updated their website at least weekly; almost a fifth (19%) did so daily, 13% more than once a week and 27% updated it weekly. Around a third update on an infrequent basis; 17% doing so more than once a year and 13% annually. Again, there is little variation between the two AT business types, with activity/ experience providers tending to update their online presence slightly more frequently.

5.29 It is those AT businesses with a larger number of employees (10+ FTEs) that tend to have the resource to update their websites daily or weekly, whereas sole traders and partnerships update far less frequently (monthly/ annually), on a more 'as and when' required basis. The main variation by sub-sector is snowsport businesses, who need to regularly update their websites (or social media, blogs etc) on an almost daily/ couple times per week basis during the season in order to communicate ever-changing weather conditions to their customer base. The websites of marine businesses are the ones which tend to be the most outdated and static.

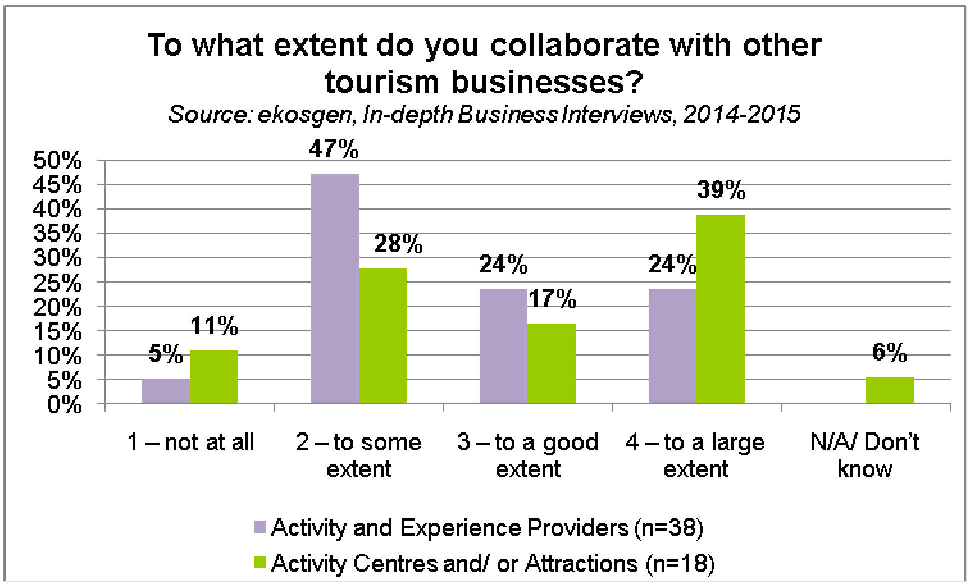
5.30 Almost half (47%) use E-commerce. This is slightly more than across the mapping database as a whole, in which 42% of businesses stated that they sold their products and services online. Of those who have e-commerce ability, an average of 50% of their trading (or bookings) is done online, showing e-commerce to be a key area for the future development of the sector.

**Collaboration**

5.31 Collaboration is evident among most businesses, with 91% stating that they collaborate with other tourism businesses, at least to some extent. Only 7% do not collaborate at all, and the remaining 2% was unsure. Collaboration is slightly more common amongst activity/experience providers. Some 95% of activity/experience providers report collaborating at least to some extent, while 83% of the centres and attractions state that they collaborate. A greater proportion of centres and attractions do not collaborate at all (11% compared to 5%).

[28] Highlands and Islands Enterprise (2015) *Digital Scotland: Highlands and Islands Research*.

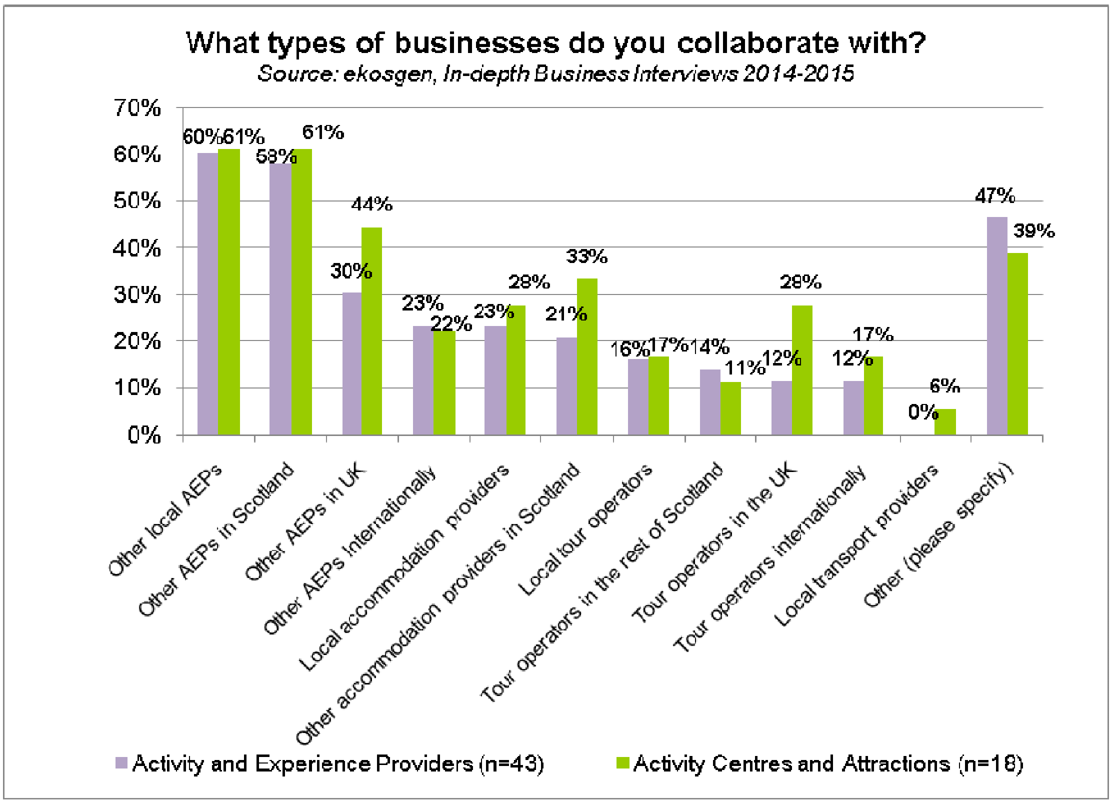
***Figure 5.6***




5.32 Where collaboration occurs among activity/experience providers and centres and attractions, it is mainly with other activity/experience providers, whether local, across Scotland or to a lesser extent, across the UK. Amongst centres and attractions, businesses commonly collaborated with accommodation providers; 28% of businesses also collaborated with tour operators in the UK.

5.33 Other collaborators included equipment providers, distilleries, public sector organisations, local parks and local authorities for advertising, agents, B&Bs and taxi companies and local schools.

***Figure 5.7***



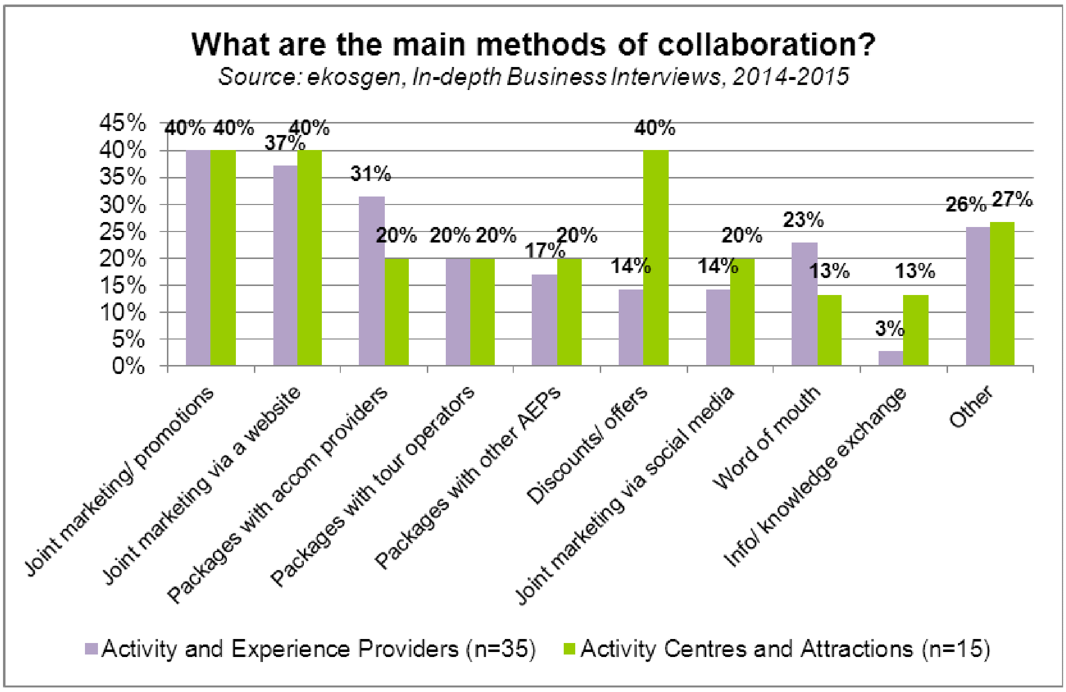
*Methods of Collaboration*

5.34 Written promotional and marketing materials remain the most frequent method of collaboration, although joint marketing via a website is also common. At the same time, only 37% of activity/experience providers collaborate via a website and just 14% via social media (and 20% for centres/ attractions) – and so there is considerable opportunity to boost this.

5.35 One in five centres and attractions collaborate through packages with accommodation providers and tour operators. Just under a third (31%) of activity/experience providers have packages with accommodation providers – and the businesses offering these types of packages are likely to be the more progressive businesses. Interestingly, 40% of centres and attractions use discounts/ offers, as do 14% of activity/experience providers. In many ways, collaboration can increase the offer to the customer, and therefore its value, and actually enables the business to charge more. Collaboration should certainly not automatically equate to discounts – in fact, quite the opposite.

5.36 Other forms of collaboration included *"joint presence at events," "joint recommendations,"* and *"Destination Management Organisations."*

***Figure 5.8***




*Benefits of Collaboration*

5.37 Collaborative arrangements were varied and benefits included joint sales pitches, joint publicity/ advertising, joint promotions and increasing the capacity of the business by working with others. For some, there is clearly scope to expand this area of their businesses and increase collaboration. Comments included:

> *"Collaboration with other activity providers lets us bid for big contracts e.g. provide 100 canoes for an adventure race when we only have 30 ourselves. Referring business to each other when we are fully booked keeps customers in the area. Linking with DMOs and tour operators brings us international business that we would struggle to tap into on our own…"*
>
> *"Discounted vouchers provided to accommodation providers lead to strong bookings as they have been recommended by the owner/managers."*

*“Work with agents, B&Bs and taxi companies to plan trips, locally, in Scotland and elsewhere. Couldn't run the business without this collaboration so it is crucial.”*

5.38 However, some businesses were less positive about collaboration, or noted some challenges. This was particularly true amongst activity/experience providers:

*“Have good relations with accommodation providers - advertise online and share leaflets. More difficult with* [other] *activity providers - want to increase but difficult because they are outside the 'top 10' companies. Collaboration is useful as it highlights our presence - good practice.”*

*“I have tried to collaborate with accommodation providers but they are very busy. I work with West Highland College to promote. I would like to collaborate more, e.g. through advertising, but different businesses do things differently.”*

*“It is very difficult - many businesses appear very suspicious. Nevertheless, some are happy and I have been able to develop good links with these e.g. with advertisers. There are others who we share customers with.”*

5.39 Of the small number of businesses who did not collaborate at all, more than a third of the activity and experience providers (36%) gave the reason that they do not see the value of collaborating – although no centre or attraction felt this to be the case. One third (33%) of centres or attractions did not collaborate because they did not think there were any businesses offering complementary products/services in close geographical proximity - around one fifth (18%) of activity and experience providers cited this reason. Just under one tenth of activity and experience providers (9%) felt that they did not know of any other high quality businesses to collaborate with, or were unsure how to go about collaborating.

5.40 A number of other responses were received, often centring around the fact that many businesses are very small and lack time/resources or that it would not actually be beneficial to the business. Comments included:

*“We do have flyers in some accommodation, but we are a small, family run business and could not cope with more clients.”*

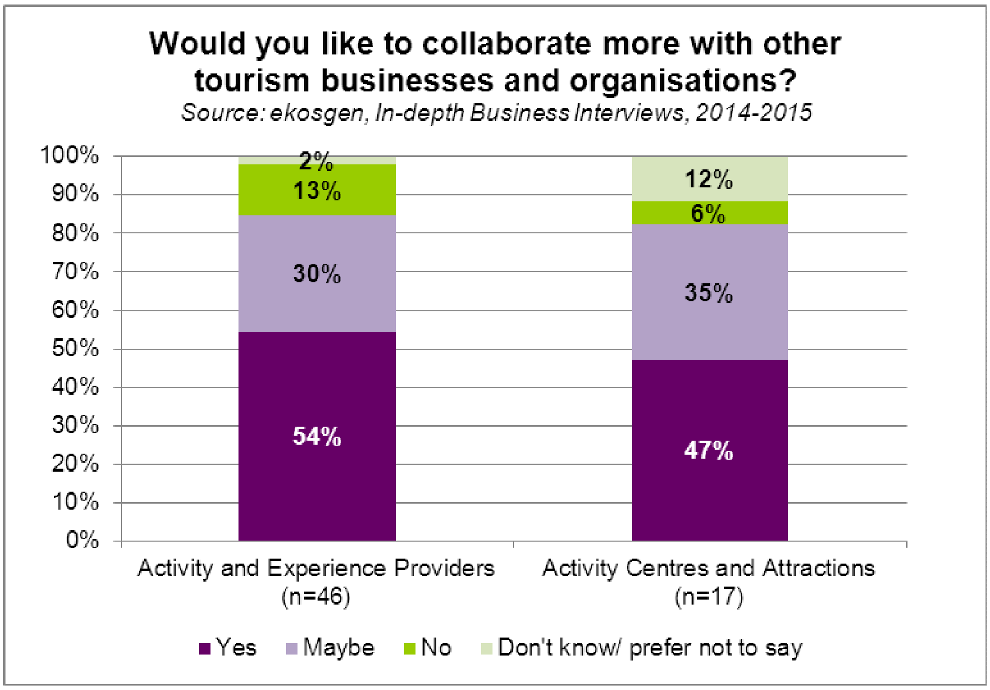
*“I have in the past but it was detrimental – collaborators can steal clients that I want to protect. It is also due to the nature of the business – it does not lend itself to this approach. I do collaborate when I run walks etc. abroad as I need to use local knowledge.”*

*“Outdoor centres are notoriously bad at collaborating and sharing… one of my personal professional goals has been/continues to be to change this situation.*”

*Potential future collaboration*

5.41 More than half of activity and experience providers say they would like to collaborate more (54%), as do almost half of all centres and attractions (47%). A further 30% and 35% respectively would maybe like to collaborate more. This begs the question: why is this collaboration not happening and what more can be done to help make it happen?

***Figure 5.9***




5.42 Those that would like to collaborate more cite a range of potential collaborators, including other AT businesses, those in the supply chain (such as accommodation providers) and public sector agencies e.g. HIE, SE, VisitScotland, and DMOs. A variety of potential areas for collaboration were mentioned, including offering package discounts, joint advertising and sharing best practice. Comments included:

> *"Would like to collaborate more with tourism and event businesses e.g. tour operators to attract large groups from overseas… Want to build relations in winter"*

> *"Would like to collaborate with tourism associations – either destination or sectoral, Visit Scotland and local authorities but have a lack of time to source collaborators"*

> "[We would like to collaborate more] *if it is beneficial e.g. marketing with local tourism organisations - it would be great if we could engage more with businesses - often focus on B&Bs. Would be useful to bring together businesses for activities/ events diary - and with onshore activities such as distilleries, food and drink establishments etc… There is a need for coordination at a higher level, e.g. through Visit Scotland, not currently profitable for events but need a coordinated approach e.g. activities, accommodation etc"*

> *"Gain more distribution channels through having even more accommodation businesses and venues recommending us. Develop more activity booking hub partnerships like we have with* [the local Estate]. *(requires partners with high footfall e.g. visitor centres)."*

## Adventure Travel Tour Operators

5.43 In depth telephone interviews were conducted with seven Adventure Travel Tour Operators (ATTOs). This accounted for a tenth of the depth interviews, and covered 44% of the 16 tour operators identified in the mapping database.

**Business Activity**

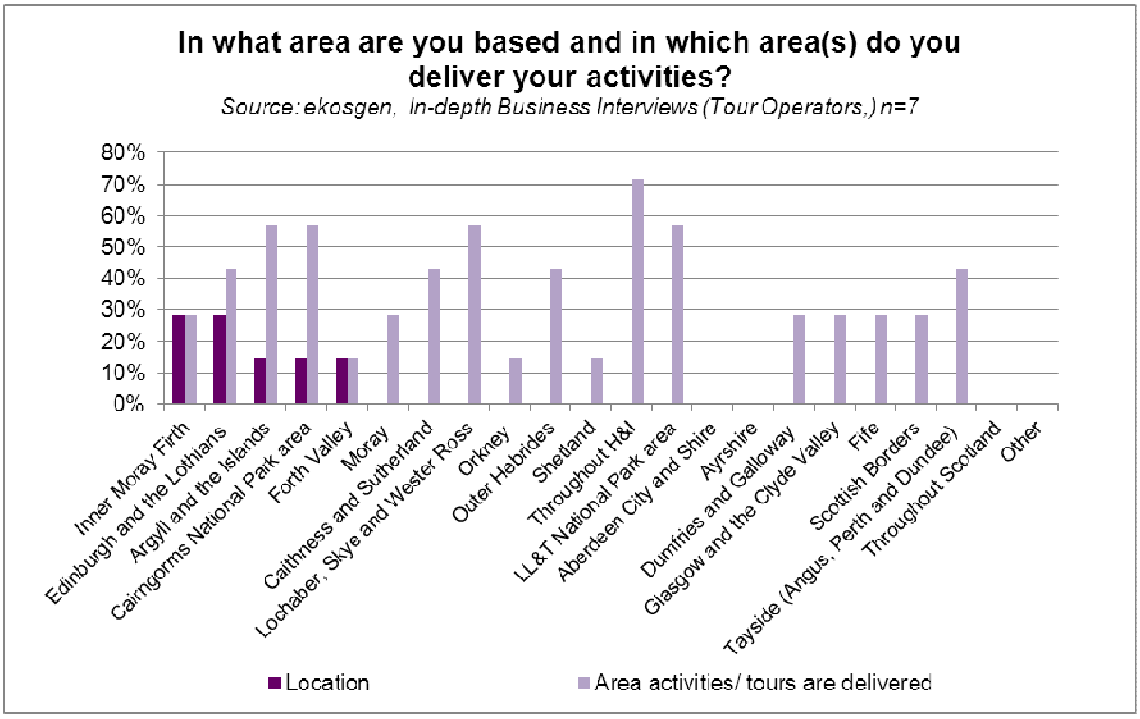
5.44 More tour operators provide a range of AT activities than either activity/ experience providers or centres and attractions. The majority offer walking/climbing activities, which are the most commonly provided, as well as cycling/biking and wildlife/nature watching. Additional activities offered are snow activities, climbing and marine and river activities. Snow-holing, self-guided walking, wildlife photography and train tours are also made available.

5.45 The largest activity market in terms of *value* amongst tour operators was the walking sub-sector. This was followed by cycling/ biking and marine activities, then wildlife/ nature watching and snow activities The widespread appeal of walking in Scotland is reflected in this sub-sector ranking as the most frequently offered activity, and the highest value amongst the tour operators surveyed.

**Location**

5.46 Two ATTOs were based in the Inner Moray Firth and two in Edinburgh and the Lothians, while one was based in each of the following: Argyll and the Islands, the Cairngorms National Park Area and the Forth Valley.

***Figure 5.10***




5.47 Tour operators offer activities/tours across far broader geographic areas than either activity/experience providers or centres/attractions. More than 70% serve the whole of the Highlands and Islands, and 40% cover Scotland (compared to 17% and 14% respectively for activity/experience providers and centres/attractions). The most popular destinations for operator tours by value in Scotland are Lochaber, Skye and Wester Ross, then Argyll and the Islands, Caithness and Sutherland, the Outer Hebrides, the Cairngorms National Park Area, Loch Lomond and the Trossachs National Park Area, Edinburgh and the Lothians, Glasgow and the Clyde Valley, Scottish Borders and Tayside.

**Products and Services Offered**

5.48 All tour operators offered activities, as would be expected. Over half offered transport (well above the third or so amongst activity/experience providers) and guides, while just over four in ten offered training and accommodation, broadly comparable to activity/experience providers and centres/attractions.

| Table 5.3: Product and Service Offerings | | |
|---|---|---|
| **Adventure Tour Travel Operator Products/ Services (n=7)** | **Number** | **Percentage** |
| Activity Provision | 7 | 100% |
| Transport | 4 | 57% |
| Guides | 4 | 57% |
| Training | 3 | 43% |
| Accommodation | 3 | 43% |
| Professional qualifications | 2 | 29% |
| Equipment | 1 | 14% |
| Personal development | 1 | 14% |
| Dining facilities | 0 | 0% |
| Delivery of education services to local authorities | 0 | 0% |
| Delivery of education services to youth groups | 0 | 0% |
| Corporate activities | 0 | 0% |
| Leisure services | 0 | 0% |
| Other(s) | 2 | 29% |

*Source, ekosgen, In-depth Business Surveys with Adventure Tour Operators, 2014/15*

5.49 Tours cited as being particularly popular were wide-ranging in nature, including the Cape Wrath Trail, Castle Crusade Biking, Fisherfield Raid, Hebridean Trail Mountain Biking, tours in the Cairngorms National Park area, an introduction to Sea Kayaking, Island Hopping Biking, Knoydart Waling, self-guided Lairig Ghru, Lochs Galore Biking, mixed activity tours in Argyll, mixed activity tours covering Edinburgh and Argyll and the Islands, tours to the Outer Hebrides, short wildlife viewing trips, skills courses, train tours, West Highland walking holidays and whisky tours. This further illustrates the breadth of the offer in Scotland.

5.50 All of the ATTOs worked through intermediaries when delivering tours, and working directly with customers/consumers was also common when delivering tours. Of those who worked through intermediaries, all worked with inbound tour operators, and the majority with other travel agents.

### Seasonality

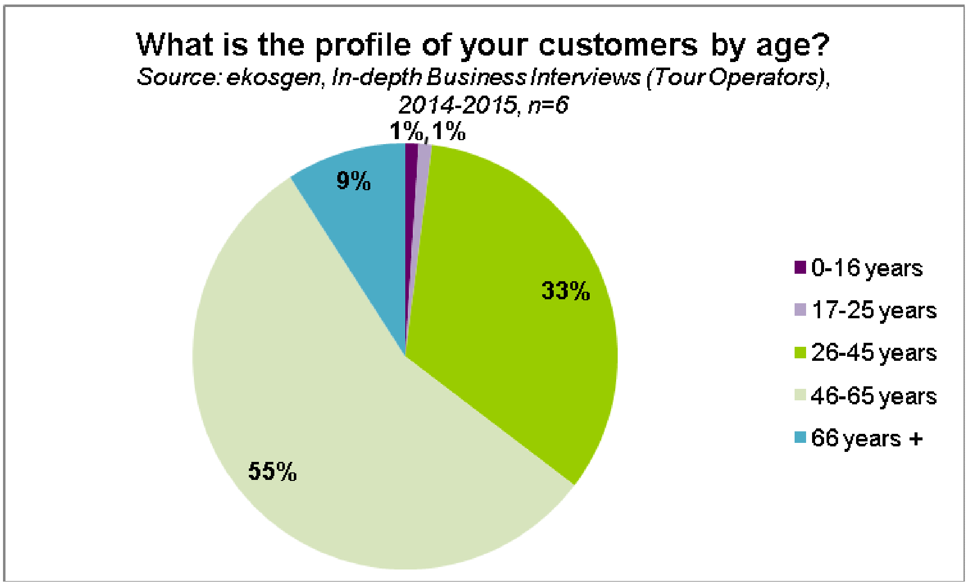
5.51 For the most part, tour operators do not provide tours all year round - the majority do so for between 4 months and 9 months of the year, (although the operators may be open throughout the year to take bookings and promote tours and so on). The most common reasons for not offering tours all year round were because of a lack of demand/profitability and because weather conditions make opening challenging/ not possible.

### Customer Profile[29]

5.52 The **age** profile amongst customers of ATTOs was older than the age profile for the activity providers and centres, with almost two thirds (64%) aged 46 years and over. One third was aged 26-45 years and just 2% were under 25 years.

[29] Please note, for this section, an estimated value was assigned to qualitative responses where precise values were not provided.

***Figure 5.11***




5.53 The **gender** profile of ATTO customers, on average, is slightly more weighted towards females (53%) than males (47%), compared to that of activity providers and centres, where an average of 59% of customers were male.

5.54 The **geographic distribution** of ATTO customers is quite different to other AT businesses, due to the wider locations in which tour operators deliver their activities. It is estimated that more than a half of all customers are from overseas, largely from Europe (a third of all customers) and North America. Around 43% are from the UK, of which the largest proportion are outside Scotland (27% are from the rest of the UK).

5.55 By far the most common **customer type** for ATTOs, on average, was general tourists (98%), while 5% were students/ school children and 1% was corporate/ business tourists; markets that could certainly be developed.

5.56 As would be expected, on average, the approximate **length of stay (of the holiday as a whole)** of these customers is longer than those for activity/experience providers and centres and attractions. In all, 71% stay for one week, and a further 5% for two or more weeks, making 76% who stay for a week or more, compared with 43% for other AT businesses. By contrast shorter stays are much less common amongst tour operators.

**Marketing Approaches**

5.57 Again, social media is a key marketing method amongst ATTOs, with 86% citing Facebook as a key channel, and 71% citing Twitter. Similarly, company websites and word of mouth are also important routes. All ATTOs have a website, slightly higher than the other AT business types (96%), and this was rated at 8.7 out of 10 for how essential this is for their business, higher than the mean score of 7.8 for other AT business types.

5.58 A greater proportion of ATTOs manage their website in-house. They also update their websites more frequently than the rest of the AT sector; usually more than once a week, including one respondent who updates in real time. E-commerce is crucial for ATTOs, and 86% had an e-commerce ability. Consequently, a greater proportion of ATTO business is done online (65%) compared to an average of 50% across the other business types.

**Collaboration**

5.59 All ATTO businesses collaborate, albeit to a small extent. The majority (71%) reported collaborating only to some extent, and a small proportion to a good (14%) or large extent (14%); this is lower than the extent of collaboration across the other business types with ATTOs being more self-reliant than other AT business types.

5.60 ATTOs most commonly collaborated with accommodation providers and other tour operators internally and with transport/ travel companies. A relatively small proportion reported collaborating with other public sector agencies and tourism co-operatives. Comments included:

> *"We work with a range of accommodation providers who provide services on the majority of our trips. We work with a number of agent partners mostly from the USA and we are their in country provider of tours under their brand"*

> *"It's mainly in the provision of packages. Developed innovative products, and been looking for someone to go into business with whose clients will fit them (challenge events). Realise the financial potential for other companies to promote certain tours and packages."*

5.61 To decide which companies to collaborate with, ATTOs took a range of approaches:

> *"We look at their values and ways of operating. We also look at their portfolio for us to make sure what we can offer will work for both organisations"*

> *"FAM* [familiarisation] *visits and word of mouth. Those who measure up to our standards on safety, quality, sustainability, customer focus"*

> *"They offer a 'get under the skin experience.' Those little hidden gems. We are also looking to operate abroad using inbound operators."*

**Potential Future Collaboration**

5.62 Most of the tour operators interviewed would like to collaborate more in particular with other tourism businesses, government agencies and local councils. Barriers to collaboration include a lack of time to source collaborators, and a lack of available collaborators, either in terms of activity providers, other tour operators or accommodation providers. One cited the disconnect between providers and tour operators as a barrier:

> *"Lack of understanding of the tour operator's position by activity providers. The problem in the adventure tourism industry is the risk of putting a trip on and not filling it. Lack of responsiveness from other organisations."*

## Summary

5.63 The more detailed conversations with AT sector businesses reinforces that there is a wide and varied offer across the AT sector. The value of walking within the AT sector is evident, as is cycling/ biking, reflecting that soft adventure is a key part of the adventure tourism market. Marine/coastal activities are also important, reiterating the findings from the wider mapping of the sector.

5.64 It is clear a wide range of products and services are offered by AT businesses, with the provision of guides cited most frequently alongside the delivery of the activity. Yet there is more that can be done to increase the level of products and services offered. The extent of collaboration is not that high amongst businesses and there is both scope and an appetite to collaborate more - over half the AT sector (and 70% of tour operators) would like to do so. Where businesses are not collaborating, this tends to be because they do not see its value, lack time and resources (often the same as not seeing its value) or lack knowledge/awareness of collaborators.

5.65 For activity and experience providers, and centres and attractions, markets are typically focused on Scotland, or the rest of the UK, although 14% are customers from overseas. For centres and attractions there is a strong schools/education market. For tour operators, more than half of customers are from overseas (57%), mainly from Europe and North America. Collaborating with tour operators, or adopting some of their routes to market, may help other AT businesses reach more international markets.

5.66 Tour operators are also far more geared towards e-commence and online booking, better using their web presence. As a result, tour operators generate more business online. As trailed elsewhere in the review, there are significant opportunities for AT sector businesses more broadly to improve greatly their use of digital technologies to bring business efficiencies and enhance market reach.

# 6 How Adventure Tourism in Scotland compares to the rest of the world

## Introduction

6.1 The review included a benchmarking exercise, the purpose of which was to:

- analyse how competitive and innovative the Scottish AT product offering is against top adventure destinations worldwide, identifying both where Scotland has the greatest competitive advantage and how it can learn from other destinations; and
- identify particular hubs or clusters of adventure tourism activity and compare these to known adventure tourism 'capitals' worldwide.

6.2 The benchmark methodology is detailed in Appendix A along with the detailed quantitative data collected for each indicator.

6.3 The benchmarking is therefore a two-stage approach. Once the comparator locations and indicators were identified, a desktop exercise was conducted to enable an assessment of Scotland's adventure tourism 'offer' in relations to its peers. The indicators were designed to assess the development and state of the AT sector in each destination, and those chosen were readily quantifiable for the most part, with subjective, informed assessment of other factors in lieu of objectively comparable data.

## Benchmarking Scotland against Comparator Countries

6.4 Scotland is benchmarked against Iceland, New Zealand, Norway, England, Wales Chile and British Columbia. Each was chosen for different reasons:

- **Iceland**, is backed up with excellent branding and promotional campaigns, and has accelerated tourism growth to its current rate of 15% per year.
- **New Zealand**, has a very strong brand and image, and offers a huge range of adventure tourism possibilities.
- **Norway**, is of similar population size to Scotland but offers a counterpoint, in terms of less-well-developed commercialised opportunities but having great natural resources and an enviable attitude to outdoor life.
- **England**, has very popular national parks, the Lake District, in particular, which brands itself the 'Adventure Capital of the UK'.
- **Wales**, has also been proactive in its development and marketing of adventure tourism. An obvious example is the highly regarded mountain bike scene, which in many respects rivals that of Scotland (having learned much from Scotland).
- **Chile**, was ranked number 1 for adventure destination potential in the Adventure Travel Development Index report[30].
- Also, while Canada is too vast to be compared directly to Scotland, focussing on **British Columbia,** with Whistler its key destination, also creates a relevant benchmark.

6.5 These were benchmarked against a range of indicators set out in full in the accompanying Appendices. In summary, the indicators are:

- the range of AT and travel activities. Appendix G provides detail on the former, the latter was informed by identifying four international tour operators and observing in which countries they operate;

[30] http://www.adventuretravel.biz/connect/summit/chile-2015/

- marketing and brand effectiveness, covering the level of adventure tourism-related information provision, in terms of websites, apps and e-guides, plus some commentary on national tourism brand and how effective it is considered to be;
- accessing adventure activities, covering the number of international airports, and international destinations flown to directly, and extent of road and rail networks;
- population density and distribution, as an indication of the landscape of the country;
- national tourism strategies/policies and the extent to which these explicitly support adventure;
- skills programmes, assessing whether programmes for personnel qualifications are available, in terms of technical (hard) skills, academic programmes and developing softer, customer-oriented skills; and
- safety frameworks, again to reflect the maturity of the AT sector.

6.6 Country-by-country profiles against each of these indicators is given at Appendix F. The following section summarises the differences between comparator countries in narrative form for each of the indicators.

**Range of Adventure Tourism and Travel Activities**

6.7 All of the countries offer a similarly wide range of guided and autonomously-undertaken adventure and outdoor activities, with Iceland having a slightly narrower spectrum of pursuits than the others.

6.8 In order to gain perspective on the popularity of these countries as adventure travel destinations, two major tour operators in England (Exodus and Jagged Globe) and two in the USA (National Geographic and Natural Habitat) were chosen and their web sites interrogated to determine how many trips, if any, they operate to each overseas country. It is instructive to note that all four companies run trips to New Zealand, Chile and Norway, with Chile the most popular destination, closely followed by Norway.

6.9 Three of the four companies operate trips to Iceland. Only one trip is operated from outside into England and none to Wales (although this is influenced by the UK base of Jagged Globe and Exodus). Just two operators ran a total of two trips to British Columbia, which is perhaps surprising, given its reputation and effective marketing. Only National Geographic runs trips to Scotland (three). While this was a very limited exercise, these are major players in the industry, and it does serve to illustrate the attractiveness of New Zealand, Chile and Norway as adventure destinations.

**Marketing and Brand Effectiveness**

6.10 Websites, apps and e-guides are used by all the national tourism bodies to communicate with potential clients, and these can vary significantly in terms of look, feel and functionality.

6.11 Visual impact is one aspect that is important. One good example of this is the *immediate visual impact* of (and ideas for) trips on the *British Columbia web-site,* which is also easily navigable and heavily outdoor/ adventure oriented: http://www.hellobc.com/. Another is the Chile web-site http://chile.travel/en/ which has an attractive home page. Iceland, through http://www.visiticeland.com/ makes good use of its landscape, as well as particular terms such as mystery, nature, pure, creative and adventurous.

6.12 Visual impact alone is insufficient however, and content, user-friendliness and interactivity are also important. The interactive map, for example, on http://www.newzealand.com/ is user-friendly, and http://www.visitnorway.com is an example of good content (in this case the range of activities). For Wales, http://www.visitwales.com/ has a wide range of e-brochures to download, although not a specific adventure guide.

6.13 In Scotland, through www.visitscotland.com or http://www.visitscotland.com/see-do/activities/ there is both good content, imagery and messaging, which varies according to the season. The challenge is to ensure good visual appeal, content/information *and* good navigation/user-friendliness. Further, there is a need to be able to access the sites, with good search engine optimisation necessary.

6.14 In terms of the effectiveness of the national tourism brands amongst the comparator countries, a number of observations were made. These are based on a subjective assessment, rather than through consumer research or statistical analysis of volumes of usage/visitor numbers. Features of effective national tourism brands appear to relate to their ability to communicate the offer, and decisions around which aspects of the respective AT offering on which to focus.

6.15 Amongst the comparators, brands such as 'Inspired by Iceland' can appear to work well, relating culture, creative industries and the landscape under a single brand. 'Norway: Powered by Nature' may be regarded as a little more muscular – implied by the term "powerful", and New Zealand: 100% Pure links wool labelling (one of its key exports) with connotations of pure, unspoiled nature. Each avoids objective statements.

6.16 In Scotland, VisitScotland's brand, 'Brilliant Moments' also 'calls to the imagination', but arguably does not really associate to the 'place'. As such it could benefit from a sub-strap-line relating to nature, the natural, etc. What appears important, in terms of the efficacy of the brand, is the extent to which the message in communicated (Visit Norway for example has strong media communications).

6.17 In the context of AT, it can be the 'inspirational' and 'feeling' brands which call to consumers' emotions, and references to nature and wildness which can be effective for promoting outdoor or adventurous pursuits. It is also interesting to note the apparent disjuncture: that Whistler the destination (see below) is very much about 'action' whilst the British Columbia offer is more open, wild and natural.

**Accessing Adventure Activities**

6.18 In terms of accessing international markets, each country has at least four international range airports. As a key 'air-hub', England stands head and shoulders above the other countries with 28 international airports, flying directly to over 80 countries: this, along with Heathrow's pre-eminence as an international hub, has obvious accessibility implications for the wider tourism market. The other countries have a reasonably broad geographical spread of international airports, with the exception of Iceland, where international traffic is heavily skewed to its south-west.

6.19 In terms of internal transport, some of the countries (England, for example) have extensive road and rail networks, but many countries have infrastructural limitations, for example:

- Iceland has no rail network and a very limited road network in the interior of the country.
- Norway, by dint of its linear shape, has awkward north-south road connections and a limited rail network, but combats this with an intensive internal air network and waterborne services such as the Hurtigruten.
- Chile also has a naturally limited road network, constrained by the shape of the country.

- British Columbia has a limited road and rail network in the very sparsely-populated north of the province.
- Wales has awkward and slow north-south road links, but Manchester, Liverpool and Birmingham are within easy, motorway-accessed, reach.
- The south island of New Zealand has relatively limited road and rail links; it does offer extensive, and popular, peripheral coach services in some compensation.
- Scotland has limited road and rail facilities on the west coast, with slow and infrequent services and no rail link up the Great Glen.

**Population Densities**

6.20 Detailing the population densities of the comparator countries, and their distribution, helps to create a general understanding of the geographical context for adventure activities. The population densities vary hugely from the three people per square kilometre of Iceland, with British Columbia (4), Norway (14), New Zealand (17) and Chile (24) almost as sparsely populated, through to Scotland (67), Wales (148) and England (413). Most of these countries (or provinces) have very unequal population distribution, however. In New Zealand, British Columbia, Scotland, Chile and Iceland, for example, very high proportions of the population live in one to three major conurbations, with the rest of the areas extremely sparsely populated. Wales and England have more evenly distributed populations, while Norway lies somewhere between these two extremes, but overall is very sparsely populated, potentially enhancing the feeling of wildness and remoteness.

**Skills Development Programmes**

6.21 The level of skills development in the AT sector across comparators provides an insight into the stage of development in the sector and its focus. The following observations are made, in relation to skills development, with greater detail provided in Appendix E:

- All the countries examined have a range of technical (hard) skills programmes in place, although the range of courses offered varies greatly. Glenmore Lodge, among others in Scotland, is a recognised leader internationally in this respect. As an example of this, Glenmore Lodge and Scottish Cycling have, in the past, pulled together the Scottish Mountain Bike Leaders Award (SMBLA) which was adopted throughout the UK and is being used internationally.

- Each country offers a range of academic courses, although the majority of these are at certificate or diploma level. Chile is a notable exception, given the more nascent nature of its adventure tourism industry. It nonetheless offers a two-year course with at least one adventure tourism module. The UK, including Scotland, leads the way in the variety of courses available, including degree programmes, and the range of institutions that offer them. Again, Scotland offers excellent provision.

- Soft skills development is another area where Scotland is strong. Very few soft skills training courses, encompassing the customer-oriented skills required to become a better, more rounded guide, seem to be available to rival the course developed in Scotland by Wilderness Scotland. Furthermore, Wild Scotland are currently developing an industry led comprehensive AT guide training framework that will build on the success of the Wilderness Scotland programme. None of the countries examined appear to offer anything either as comprehensive or targeted as this course, with the exception of Canada, which also offers a wilderness guides course. In addition, World Host, a customer service training organisation, offers good skills development in more general terms for customer/visitor experience.

**National Safety Frameworks**

6.22 As the UK's Adventure Activities Licensing Service (2015) states: *"the aim… is to provide assurances to the public about the safety of those activity providers who have been granted a licence".* All comparator countries, with the exception of Chile and Norway, have readily identifiable frameworks in place. In the case of Chile, this reflects the relative lack of maturity of the AT sector, whereas others (for example the UK) have developed frameworks over time to reflect consumer and legislative demands for safety in the sector.

**National Tourism Strategies**

6.23 Most of the comparator countries have national tourism strategies and most of them acknowledge the importance of the outdoor recreation and adventure tourism sector. Observations include:

- New Zealand has an Outdoor Recreation Strategy, as well as a tourism strategy.
- Interestingly. VisitNorway has a 'brand strategy'[31], while Innovation Norway has its own tourism strategy.
- VisitEngland has a tourism framework, although little mention is made of the outdoor/activities/adventure sub-sector.
- Chile has an apparently comprehensive national strategy including adventure/the outdoors.
- Iceland has a government Tourism Strategy[32] which mentions outdoor activities but makes no mention of adventure tourism.

## Benchmarking Scotland against Comparator Countries: A Discussion

6.24 There are a number of key discussion points arising from the benchmarking review against comparator countries. These are not definitive conclusions, rather considerations around certain issues in light of what countries are doing elsewhere:

*National Safety Frameworks and Skills Development Programmes*

- Scotland is world-class in terms of the frameworks it has in place for client safety and the range of skills development programmes. In some of these areas it is *world-leading* – for example in the quality of its scenery and natural resources, and in the extensive professional qualifications framework for most activities. The provision of skills development is clearly not lacking – domestic uptake, on the other hand, needs to be facilitated and encouraged.

*Internal Access*

- In terms of internal access, while it may be considered quite difficult to get to the remote areas in which many outdoor and adventurous activities take place, in comparative terms Scotland appears to be a more compact country that offers easier and quicker access than countries such as Chile and Norway. However, this is overlooking a matter of scale. Considering Scotland's compactness compared to these countries, accessibility is uncompetitive. Trains are slow, rolling stock is old and

[31] http://visitnorway.org/wp-content/uploads/2013/03/Brand_Platform_Norway_tourist_destination.pdf)
[32] http://www.scribd.com/doc/2066152/Tourism-Strategy-Iceland-2006-2015#scribd5-

integrated travel networks are partial or non-existent in most places. Carrying bicycles or kayaks on public transport is difficult and impossible respectively. In New Zealand, for example, there are good networks of integrated services enabling equipment transport to the key sites of outdoor action.

*Adventure Activities*

- Scotland offers a wide range of activity possibilities, although other countries, especially New Zealand, have more successfully aligned themselves with the more obscure commercial adventure pursuits that are narrowly-focussed but popular “adrenalin-hits”. This narrows the market potential of the offer however, and in Scotland, the majority of tourists with high disposable income are in the 50+ age bracket and may not wish to indulge in these pursuits, but in activities involving the great outdoors more generally. Further, from a strategic point of view, ’extreme’ activities lack the multiplier potential of more traditional outdoor pursuits such as hill walking, sailing and sea kayaking (in view of the smaller numbers involved in “extreme” activities, although the spend per head may be higher than average). Scotland would, in general, do well to retain its sense of purpose as a site of traditional outdoor activity excellence – more in line with Norway’s core activity bases, although promotional activity does need to be balanced. For example, the huge spend by Visit Norway on filming breathtaking base-jump activities showcases its amazing landscapes beautifully, and may well encourage some visitors, but may also alienate many, who will tend to assume that the place is only for ‘heroes’ and extreme sports aficionados.

*Branding*

- While VisitScotland uses outdoor and adventure related imagery with some success, Scotland does lack an overall *brand* and associated strapline which ‘fires the imagination’ and stirs the emotions in the way that those of Norway, British Columbia and New Zealand do for example, although this is a qualitative assessment. Brands are crucial in the early development of consumer attitudes to places and strong brands form the beginning of a relationship with a destination.

*Technological Adoption*

- A significant area where Scotland has issues to be addressed compared to some comparators (although not directly covered by the indicators) is technological adoption, given the constraints of the current infrastructure. Compared to Scandinavian countries, for example, the mobile phone reception in rural areas and provision of (free) wifi is uncompetitive. However, these issues are being addressed as national priorities (see www.digitalscotland.org) and evidence from HIE’s Digital Economy Business Survey (March 2015), indicates that website and social media use amongst tourism businesses in the Highlands and Islands are greater than in other sectors.

*Consumer Journey and Booking Processes*

- The consumer ‘journey’: the more amateur nature of the access to activities (as well as the relatively modest accommodation and food offer) in Scotland lags a long way behind many countries, including some countries which are new entrants to the global AT market. For some, perhaps as a result of the partial, part-time and seasonal aspect for many operators, their web presence (if they have one) is often out-of-date, with low-quality pictures and inflexibility of operation. This does not encourage 'there and then' booking, and instead may suggest the customer contacts a telephone number or an email address. More sophisticated, often urban based, 21st century consumers can easily find this frustrating and, with an increasingly short online attention span, move on to the next offer. Poor connectivity may also impact in this arena, but, as identified above, this issue is being addressed.

- Consultation with industry practitioners from larger, more 'switched-on' organisations (see Chapter 5) also suggests that greater efforts need to be paid to the implementation of wide scale seamless online booking processes and the provision of information that is not only PC-accessible but crucially is geared to today's smartphone and tablet users.

- Linked to the points above, there is insufficient co-operative vertical and horizontal integration via web links and recommendations, particularly when compared to countries such as New Zealand. Nor is there much in the way of local packaging (one-stop-shop) initiatives to make the consumer choice simpler (and the modest levels of collaboration identified in Chapter 5 reinforce this). Other destinations offer bike-hire deals via the accommodation booking process, for example, and vice versa – and the benchmark review identifies that this is considerably rarer in Scotland as a whole.

## Benchmarking Scotland's Adventure Hubs against Comparator Destinations

6.25 The benchmarking of Scottish adventure hubs against known international and domestic adventure capitals was also undertaken against a range of indicators (see Appendix F). These included physical ease of access to the destination, ease of accessing information, the existence of a local tourism strategy and reference to AT, number of AT activities possible and commercial operations, and the richness of the activity 'menu'.

6.26 In addition, the Destination Management Organisation (DMO) in each destination was contacted and requested to provide good practice examples of product and service innovation and collaboration, as well as the number of business start-ups in the last two years. Data is presented in Appendix F and summarised and discussed below.

6.27 The comparator destinations identified for benchmarking were:

- *Queenstown* in New Zealand as the self-proclaimed, but widely-acknowledged, 'adventure capital of the world'.
- *Whistler* in British Columbia, Canada, given that it is routinely voted the best ski resort in North America and is now probably the most well-recognised mountain biking destination in the world.
- *Ambleside* in England is the premier hub of outdoor activity (and outdoor gear shops) in arguably the jewel in the crown of English national parks.
- *Betws-y-coed* in Wales is Ambleside's equivalent in Snowdonia National Park.
- *Fort William* is the Outdoor Capital of the UK to a Scottish outdoor audience.
- *Aviemore* is a well-known Scottish outdoor hub and gateway to the Cairngorms National Park.
- *Oban* is growing its reputation as a hub of predominantly sea-based activity.

- The *Isle of Skye* as home to the Cuillins and possessed of enviable ‘folklore’ status, although not a natural hub, is undoubtedly a key adventure destination.
- *Peebles* for mountain bikers is the home of one of the UK’s best-known purpose-built trail centre, as well as offering other outdoor activities.

**Access to the Destinations**

6.28 In terms of ease of access for international customers, the English and Welsh destinations, and Aviemore, have relatively good access to a range of airports, while the more remote west coast hubs are more challenging in that respect. Fort William, Aviemore and Oban both lie on rail and coach routes, as well as the national cycle network, even if sections of it are rather undeveloped at present. The Isle of Skye is more of a challenge to get to, for domestic and international customers, but that may be part of its appeal. Queenstown has its own international airport, albeit with limited direct flights, while Whistler is a straightforward two-hour drive or bus journey from Vancouver.

**Accessing Destination Information**

6.29 Both Queenstown and Whistler, perhaps unsurprisingly, have their own websites, apps and online booking facilities for accommodation or activities. The UK destinations compare relatively poorly in this respect, lacking apps and the ability to book holiday elements such as accommodation centrally through the destination marketing organisation, partly a result of the different structure of tourism to comparator countries.

6.30 There are a range of destination brands used by the comparator destinations. Some make use of the national country brand (e.g. *Queenstown: Pure inspiration* and its relationship to Pure New Zealand) whilst others seek to identify themselves as ‘capitals’ (including Fort William as the *‘Outdoor Capital of the UK’*). There are, however, clear challenges in getting the ‘right’ marketing and messaging. For example, ‘capital’ to some people may mean cities, and, whilst the use of gateway can be effective in signalling a nearby asset/attraction (e.g. *Betws-y-coed: The Gateway to Snowdonia)* to others it may also suggest to visitors that they should pass through, rather than stay – a possible problem for tourism operators.

6.31 Further, there are challenges in appealing to a wide variety of visitors whilst also conveying something distinctive about the destination. For example, *Oban: Seafood Capital of Scotland* clearly accentuates marine/coastal environment, yet may be rather narrowly framed. Others hint at more to be discovered (e.g. *Peebles: One of Scotland’s Hidden Treasures*). Whilst less easy in the UK due to the set up of the tourism sector, some of the comparator destinations (via their websites) focus on selling and packaging the destination (e.g. Queenstown).

6.32 Amongst the other comparator destinations there is less direct branding or marketing. Whistler has no obvious brand of its own, neither do Ambleside or Aviemore where both benefit from the wider regional brand: Cumbria uses the Adventure Capital of the UK, and Aviemore the Cairngorms ‘Make it Yours’. The Isle of Skye bills itself as the ‘world’s favourite island’, but also appears to use ‘Live, Love, Learn, Skye’ which is less likely to have meaning for a non-local consumer/tourist.

**Local Tourism Strategies**

6.33 Across Scotland there are a number of DMO-led destination strategies in place, some of which are not published. Some of the comparator destinations do not have their own local tourism strategy. Whistler, with its own ‘vision’ (albeit more wide-ranging than just tourism) and Fort William were notable exceptions, both of which recognise the importance of outdoor activities to the local economy. The Lake District does have its own regional strategy and, further, its own adventure strategy.

**Adventure Tourism Activities and Commercial Operations**

6.34 The table in Appendix H confirms that in Whistler and, in particular, Queenstown it is possible to undertake a wide range of outdoor and adventure activities, both self-guided and commercial. The UK destinations offer a more limited, but still significant, breadth of activities locally, although Peebles stands alone in offering few activities, most of which will be undertaken autonomously.

6.35 In terms of the number of commercial operators in each destination, Queenstown, befitting its reputation, stands alone, with over 100 operators, working across a vast range of sub-sectors and niches. Whistler has a greater number of adventure tourism businesses operating locally, while again the UK destinations offer a broadly comparable breadth of operators with comparator countries, with the obvious exception of Peebles, which has a rather limited range of commercial activities, as suggested above.

**The Richness of the Activity Menus**

6.36 While the intention was to use average TripAdvisor ratings for customer satisfaction with adventure guiding and accommodation, in practice the data were too coarse to be meaningful and were therefore not used. It is also acknowledged that only a certain proportion of businesses will use TripAdvisor or Booking.com; it is, however, a useful source of accessible secondary data for each of the destinations.

**Provision of Accommodation**

6.37 Assessment of the number of accommodation providers per 1,000 on Booking.com confirms the large concentration of providers in Betws-y-Coed, Aviemore and Ambleside, when compared to the resident population, although in the case of Betws-y-Coed the settlement itself is very small. Queenstown and Whistler both have the lowest numbers of accommodation providers per 1,000 of population, although this is somewhat skewed by the larger populations of these areas. Results from TripAdvisor show the same pattern in the rankings, although TripAdvisor statistics tend to suggest a larger overall number of providers within 10km. It should be noted that for some destinations, such as Peebles, day trips are more common and so accommodation provision is currently less important.

**Table 6.1: Estimated Number of Accommodation Providers per 1,000 Population**

| Area | Based on booking.com within 10km | Based on TripAdvisor within 10km | Population |
|---|---|---|---|
| **Betws-y-Coed** | 49.04 | 176.05 | 600 |
| **Aviemore** | 21.51 | 77.22 | 2,800 |
| **Ambleside*** | 15.49 | 55.56 | 2,600 |
| **Peebles^** | 6.93 | 24.89 | 8,200 |
| **Oban** | 6.12 | 21.96 | 8,600 |
| **Isle of Skye** | 6.10 | 21.88 | 10,000 |
| **Fort William** | 5.83 | 20.94 | 10,500 |
| **Whistler** | 5.79 | 20.80 | 9,800 |
| **Queenstown** | 4.69 | 16.85 | 12,500 |

Source: UK populations based on 2011 Census data; local authority data; and ONS Mid-Year Population Estimates. * Please note, Ambleside population based on ONS Mid-Year Population estimate for Ambleside and Grasmere (2012) ^ Please note, Peebles population based on Royal Burgh of Peebles Community Council Area. Whistler population from: http://www.whistler2020.ca/whistler/site/genericPage.acds?instanceid=2985334&context=2985223

**Breadth of Eating Provision**

6.38 While it is acknowledged that sampling local foods can be part of the wider adventure experience for many people, trying to quantify the use of local food was not deemed to be realistic. Table B in Appendix D indicates the breadth of eating establishment types (from Indian and Italian to more esoteric Vietnamese and Japanese) in each location, used as an indication of catering to tourists' demands. Queenstown and Whistler, as befits their worldwide popularity, offer the widest range, although Aviemore, Oban and Ambleside fare well in this respect. Only four of the destinations (Fort William, Isle of Skye, Ambleside and Queenstown) have Michelin-starred restaurants, with Skye (obviously not a town like the other comparator hubs) having two, rather underlining its broader appeal. Whistler appears to have none. Outdoor destinations often celebrate the 'healthy outdoors' theme with fresh, local produce, interesting menus and good coffee.

## Benchmarking Scotland's Adventure Hubs against Comparator Destinations: A Discussion

6.39 Again, the benchmarking against destinations gives rise to a number of considerations of issues based on practice elsewhere.

*Accessibility*

- With regards to accessibility to both international and domestic consumers, Scottish hubs are broadly comparable to the other destinations. With the exception of Whistler, all of these locations have their own accessibility issues: Ambleside has congestion issues in summer, Betws-y-Coed is some 140km from the nearest airport (Manchester International Airport), and Whistler is almost the same distance from Vancouver International Airport, while Queenstown has its own international airport, the direct flights to there are limited.

*Range of Activities*

- Most of Scotland's hubs, with the exception of Peebles, were broadly commensurate with the competitor destinations in terms of the range of activities possible, as well as the number of commercial operators offering activities. The obvious exception to that is Queenstown, which appears in a league of its own, at least in terms of the breadth and number of commercial operations.

- Destinations need to asset-match better; it is not feasible for all locations to benefit from the same range, style and ethos of outdoor activity. The *location* of Peebles, for example, and its easier access to Central Belt consumers and those from south of the border, suggests an adventure destination with considerable development potential, and for the delivery of short, half- or one-day experiences. In this case the need for integration between businesses is to encourage a longer dwell-time in the town, encouraging spend in bike-shops, cafes and the like.

- Skye, on the other hand, offers the romance and mysticism that serve as the backdrop for experiences which rely more upon the natural and cultural environment – just *being* there may be enough, but guides could enable access and interpretation of some of the island's wildest places and best 'happenings'. This is of course in useful competitive contrast to the selling of thrilling experiences (e.g. scream n' go) - activities at which Queenstown excels, or the same in Iceland, where the 'snap n' go' coach and car borne tourists simply get out of their vehicles, take a photo, and get back in, having spent nothing in the destination. To an extent, this highlights Skye as an example of an adventure *travel* destination rather than adventure tourism destination per se, where the atmosphere created by land- and seascape mean that just being there is part of the adventure for many. Scotland as a whole has this appeal, with consumers indicating that the Scottish outdoors is 'hardcore' – wilder, remoter and bigger than other UK destinations, and less populated than many European ones. This is in contrast with the focus, in some places, on 'capsule adventure experiences' offered for a half day by many in the activity hotspots.

- The opportunity in Scotland, however, is to extend the activities from the hubs into the wild sea and landscapes which surround them, via so-called 'soft adventures' – and adaptation of the slow tourism concept, which encourages journeys, food and cultural connections and overnight stays outdoors (or at least in bunk houses and bothies for example). This increases the experiential reach of the hubs, the economic multiplier potential and the carrying capacity of the 'hub' itself. It also broadens the appeal of the area, encouraging tourists to dwell for longer. Scotland should strive, then, for 'depth' in its outdoor product portfolio, rather than breadth. Soft adventures, gastronomy and wildlife watching fit well together, jet-boating and ecotourism less so.

*Accommodation, Food and the Consumer Experience*

- Scotland's destinations offer a range of both accommodation providers and eating establishments. It is not generally a cosmopolitan range, and one might find it difficult to find a Vietnamese or Moroccan restaurant, for example, nor indeed many selling local food (but this last aspect is rapidly improving each year) or catering for more modern tastes such as low-fat, vegetarian or gluten free meals. Whilst these types of multi-cultural dining seem at odds with the ideal of supplying, locally sourced and produced food, if an overall strategy is to internationalise the offer and extend stay length, it is necessary to offer a mix of dining opportunities at a range of prices to complement and contrast with the traditional Scottish fare and maintain interest. The accent in many places still hinges on fast, fried foods, with a lack of local, light and innovative cooking in all but the most expensive venues.

- Ambleside in England has an excellent range of eateries from Michelin-starred to cheap but wholesome cafes, and the town can act as a very welcome stopover after time in the hills. It is less evident whether this quality of provision exists in Scotland. In addition, the seasonal nature of employment often means that a restaurant which had a good reputation one season may be ordinary or poor the next. There are gems to be unearthed in many of the destinations, however – the issue here is that finding them is hard without local knowledge, and local knowledge, according to the research, is wanting.

- The new adventure consumers, as illustrated in the 2014 UNWTO report on global adventure tourism, and the tourism trends reports from the ATTA (2013), both point to a near recession-proof market for deep, meaningful experiences, authentic in their engagement with culture, the arts, the regional foods and local concerns. These consumers are discerning, wealthy, travel at any time of the year, and *will pay* for extraordinary experiences, delivered against a backdrop of eco-consciousness and ethically acceptable trading standards. They expect high standards of food, 'wow' moments of insight, learning and excitement, and innovative, original forms of accommodation (or deeply traditional, 'authentic' forms). Scotland currently struggles to serve these lucrative, significant experiences.

- Anecdotal evidence from the guiding community suggests that this food and accommodation weakness is one that needs to be addressed across the board, and that tour operators struggle to find the boutique hotels and restaurants of high quality and locally sourced produce to satisfy high-end demand. Old ideas of outdoor adventure (as old fashioned hardy explorers) have long gone, and the best destinations are clearly well aware of this fact.

*Information Access*

- The quality of the information available on destinations across Scotland is an area in which they lack a competitive edge. While they all have websites, the strength of their brands, where they exist, varies greatly, as does the provision of information and the inspiration that the websites convey.

- Most of the web sites in Scotland betray obvious resource limitations of the relevant organisations. In these respects, they are well behind effective marketing destinations such as Whistler and Queenstown, which clearly operate on a different level resource-wise: Destination Queenstown, for example, in a town with an urban population of 13,000, has 13 members of staff. The rather perfunctory nature of some of the Scottish websites suggests operation with limited resources, which manifests itself in a general lack of centralised booking systems for accommodation or activities - and suggests one area in which greater financial support may be required, although this needs to be appropriate to existing and potential demand for visits. HIE's Digital Economy research[33] also indicated that other factors, including knowing how, rather than finance, were the barriers to adopting technologies.

6.40 The authors contend that nowhere in Scotland can directly compete with the likes of Whistler, in view of their terrain, scale and reliable snowfall; or to be able to compete with the combination of setting, diversity and climate of Queenstown. However, what Scotland's destinations can offer is the abundance of real (not contrived) towns, culture and folklore with often exceptional locations and adventure possibilities. These encompass the whole range from 'high octane thrills' to the quiet enjoyment of landscape. Scotland has an ethereal beauty, a distinctive and world-renowned history, culture, language, gastronomy and natural capital. The snow-covered mountains, crashing seas, rugged coastlines and peaty whiskies are but a few of the experiential trophies which, combined with the insights derived from interactions with expert guides and the care of a revived, professional and innovative hospitality industry, can deliver world class customer experiences.

## Summary

6.41 The review benchmarks Scotland against a range of indicators (e.g. range of AT activities available, access to AT activities, marketing and brand effectiveness) against Iceland, New Zealand, Norway, England, Wales, Chile and British Colombia.

6.42 A wide range of activities are currently offered in Scotland, although other countries, especially New Zealand, have more successfully aligned themselves with the more obscure,

[33] Highlands and Islands Enterprise (2015) *Digital Scotland: Highlands and Islands Research*.

commercial, ‘adrenalin-hit’ adventure pursuits. These activities, however, narrow the market potential of the offer. Scotland would do well to retain its sense of purpose as a site of traditional outdoor activity excellence, similar to Norway.

6.43 Scotland is considered world class in terms of the frameworks it has in place for client safety and the range of skills development programmes, and in some areas it is world-leading. In terms of internal access, Scotland is more compact, and appears to offer easier and quicker access to activities than countries such as Chile and Norway. However, slow and non-integrated public transport makes accessibility uncompetitive compared to many other comparators.

6.44 Scotland lacks an overall brand and associated strapline which stirs the emotions in the way that those of Norway, British Colombia and New Zealand do, for example. Technological adoption, for example mobile phone reception and the provision of wifi, is a significant area where Scotland has issues to be addressed compared to comparators.

6.45 Similarly, Scotland lags behind many countries in the consumer ‘journey’ and booking process. For some, perhaps due to the seasonal nature of the activities, their web presence is often out-of-date and low quality. There is also insufficient collaboration by way of co-operative vertical and horizontal integration via web links and recommendations etc.

6.46 Further, the review benchmarks some of Scotland’s adventure hubs (Fort William, Aviemore, Peebles, Oban, and Isle of Skye) against comparator destinations (Whistler, Queenstown, Ambleside, Betws-y-Coed).

6.47 Most of Scotland’s adventure hubs (with the exception of Peebles) are broadly commensurate with the competitor destinations in terms of the range of activities possible and the number of commercial operators, however all have accessibility issues, (as do comparators). Food and accommodation standards have risen over the years in Scotland, although the new adventure customers expect high standards and exciting, innovative forms of accommodation and many Scottish hubs struggle to serve these markets.

# 7 Key Sector Growth Opportunities and Challenges

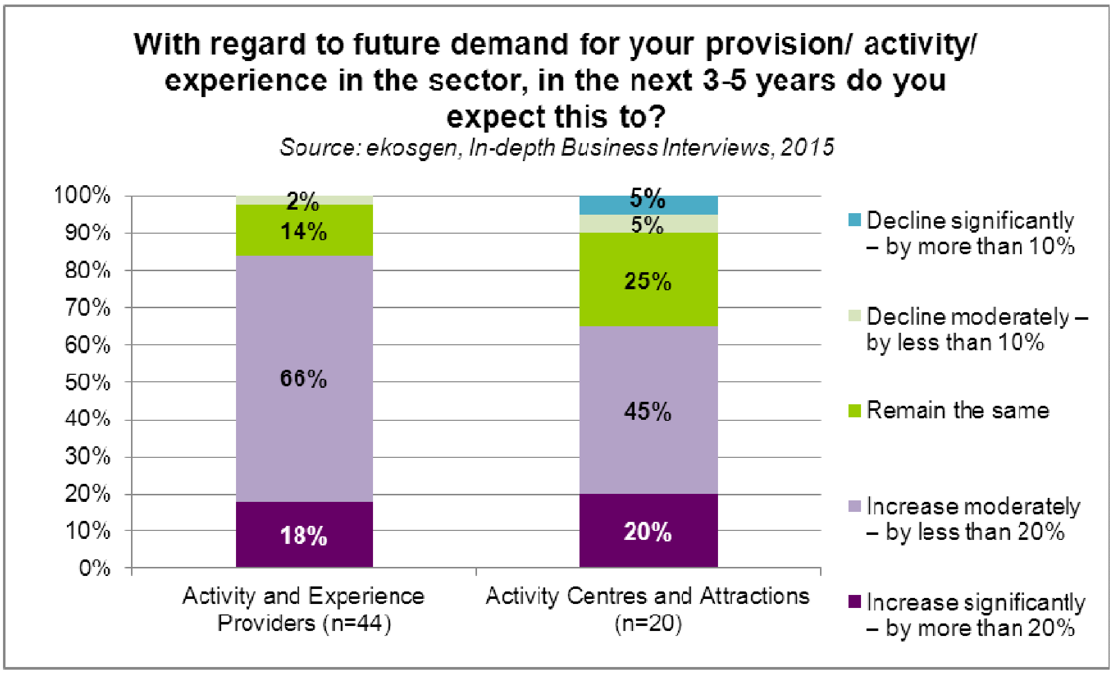
## Introduction

7.1 This chapter highlights growth opportunities for the sector going forward, principally identified by businesses themselves, overlaid with the views of stakeholders and agencies active in the sector. The section also reflects on the challenges facing the sector, including businesses' support needs and the barriers to realising opportunities.

## Growth Opportunities

7.2 Most businesses expect demand to increase. In all, 84% of activity and experience providers and two in three activity centres/attractions expect future demand to increase in the next 3-5 years. For both, almost a fifth are expecting this to be significantly so. The increase in demand is expected to come from market opportunities around particular customer types, markets, themed offers and sub-sectors.

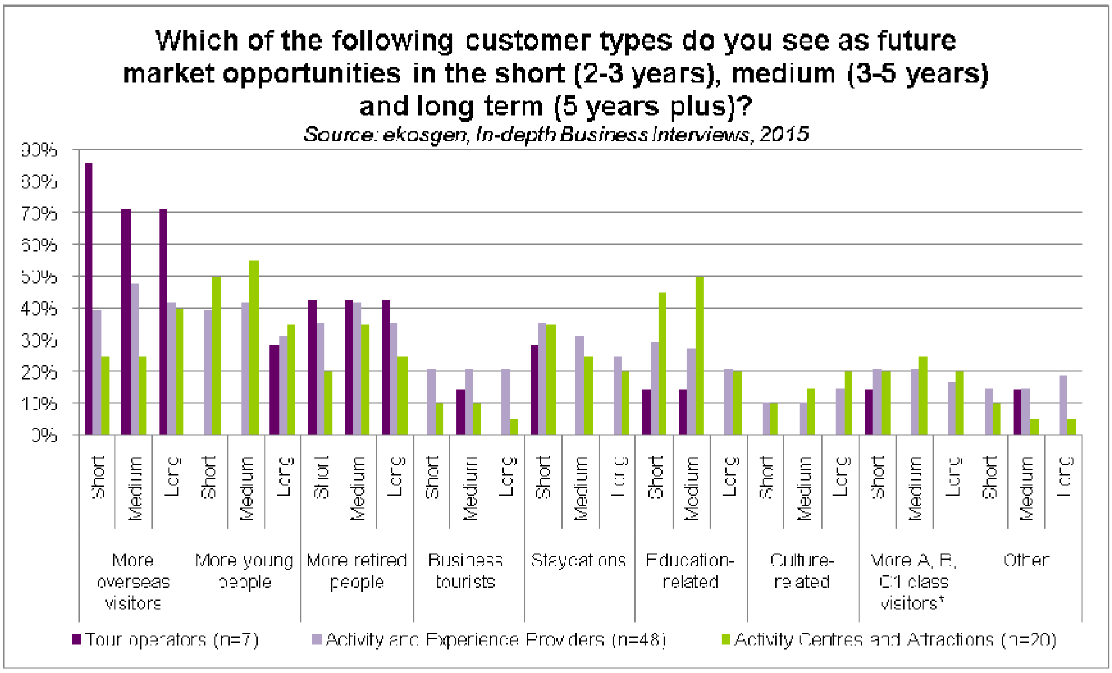
***Figure 7.1***




7.3 The in-depth business interviews identified a number of key growth opportunities with respect to customer types. Overseas visitors, younger people and retired people were the top three highlighted by each business type (against a menu of responses, although tour operators did not consider young people as a growth market). Families were not a specific category although many of the 'other' responses related to this group.

7.4 For activity centres and attractions, there is a much greater potential for growth from young people and from education-related markets. They are also expecting relatively more opportunities from staycations when compared to the other groups. By contrast, tour operators are much more likely to see overseas visitors as an area for growth. Businesses suggest overseas visitors are likely to come from a wide range of markets, most typically mainland Europe and Scandinavia, the United States and Asia.

*Figure 7.2*




*A, B, C1 class visitors are defined as those that are upper middle class, middle class or lower middle class.

7.5 Market opportunities identified by businesses interviewed are corroborated by discussions with stakeholders and with business views through workshops/group sessions. The importance of families came through more strongly in the workshops. Key growth opportunities were identified through these research strands as:

*Customer Types*

7.6 *Young people*: in particular “millennials” aged 20-35 years, from the UK and overseas, who are identified as wanting a broader type of provision that reflects their social and environmental values. These may not be especially high earners, being students or those in the early stages of their career.

7.7 *Older people:* the ageing population domestically and internationally and the “empty nesters” continue to be expected to grow, although over time a reducing baby boomer market may counteract this trend a little. Further, older people are now typically fitter, healthier and more active than previous ‘older’ generations.

7.8 *Families:* these are regarded as quite a different market to individuals. For families, adventure is just one part. In the United States, for example, aunties with nieces and nephews is a recognised group with disposable income to spend and a taste for international travel. There is also an increase in the number of extended Asian families, less conventional than the two adults and two children (which is often the basis of family tickets).

7.9 *Staycations*: as mentioned, businesses continue to think staycations will continue to grow, likely to be a result of a range of factors including the economic climate and some financial constraints. Centres and attractions are the part of the sector most likely to experience interest from business tourism as the economy strengthens.

*Markets*

7.10 *Overseas markets*: as well as ‘near neighbours’ (European tourists, see 3.20), overseas opportunities identified through the research include the BRIC (Brazil, Russia, India and China)/MINT (Mexico, Indonesia, Nigeria and Turkey) countries, which have been a market opportunity for a few years now[34]. Workshop attendees report an increase in Chinese visitors in the last five years although the proportion of customers from Asia remains relatively small. The Asian market is regarded as not just China, with the Middle and Near East markets growing too. Asian markets, in particular, have different outlooks (cultural) and requirements, while language can be an issue clearly (see barriers below). It is also interesting that most are finding Scotland and destinations via web searches. For some, India represents a bigger market, and one which makes wider use of intermediaries (agents, tour operators) than Asia.

7.11 The United States market is also clearly a growth area for some, and this market has high demands, in particular for high quality accommodation and food (demands that are not always easy to satisfy in parts of Scotland).

7.12 *UK markets*: for all of the potential of the overseas markets, there is still a big opportunity in the domestic (Scotland) market, and in the rest of the UK; the largest current markets for the sector aside from tour operators. In the case of the Scottish consumer market, it is recognised that many Scottish people do not "do outdoors". This links back to the growth opportunity afforded by the National Health Service active lifestyle agenda which has political backing and is well resourced. There are also wider opportunities to re-position Scotland and its marketing based on 'pride in Scotland'.

*Themed Offer*

7.13 *Linked trailed; packages; 'journey to' opportunities*: – this came out strongly as a growth opportunity from the group discussions and consultations. This is about linking the assets and product offers that Scotland possesses (e.g. via its canals), through collaborative working and marketing to this effect.

7.14 *Eco-tourism, healthy living and education*: as reflected in the high rating for education as a growth area amongst businesses, wider consultation also identified environment-education and active lifestyle as drivers of future growth opportunities, linked to ethical consumers and the benefits of the outdoors.

*Sub-sectors*

7.15 *Soft adventure*: e.g. flat/short route biking. This is widely recognised as a growth opportunity by the business community and industry experts/professionals. This sits alongside the comment that too much of a focus on high adrenaline adventure activity (e.g. snow or ice-climbing) can act as a disincentive for some;

7.16 The tour operators consulted provided some views on where they think future demand will come from at a sub-sector level. Three in four (71%) expect walking to increase moderately, and cycling/ biking demand is also expected to grow moderately or significantly (57%). Wildlife/ nature watching (29%), followed by marine activities (14%) were also expected to grow. Only river activities were expected to decline (by 29%).

7.17 In terms of greatest demand for specific activities, walking, self-guided walks and one week tours are expected to be popular going forward (rank 1), as are road cycling/ mountain biking, skills courses and packages (rank 2). Tour operators also expect future demand for sea kayaking and guided packages (ranked 3).

[34] See, for example, *Scottish Tourism Alliance* (2011) *Towards a Strategy for Tourism in Scotland. Summary of Outputs from Phase 1: June 2011*, p. 8

**Other Growth Opportunities**

7.18 *Internet and social media:* this is seen as a growth opportunity in terms of access to customers and promotion of product. Those able to cater for IT-savvy consumers are also likely to see future growth. At the same time, the challenge is to keep at pace with, or ahead of, competitors seeing this as an opportunity.

7.19 *Collaboration*: widely seen as a way to capitalise on growth opportunities, although, as discussed in the previous chapter, this is not always achieved.

## Scotland's strengths and weaknesses

7.20 Scotland's key strengths, according to the tour operators, revolve around its location and the natural landscape/ wildlife offer, with comments including: *"world class locations and biodiversity – land and marine," "terrific destinations – identifiably Scottish" and "beautiful landscape and environment."* Other key strengths which will help set Scotland apart from competitors include *"high calibre guiding staff," "safety/ security," "culture – Gaelic/ Celtic,"* its *"rich culture and history"* and *"greater professionalism amongst businesses."*

7.21 On the flipside, tour operators feel there needs to be a better understanding of the sector (although it was not specified by whom), and better support from the public sector (with one tour operator feeling that the public sector was providing competition for AT businesses) and supporting agencies, as well as an improved/ cheaper accommodation and food and drink offer. Comments included *"respect for and understanding of Adventure Tourism as a sector and career," "expensive accommodation-compared to France for example-especially given the current economic climate,"* and a *"lack of joined up thinking from the public sector."*

## Barriers to Realising Opportunities

**Challenges for the Business**

7.22 There are a number of barriers to realising these considerable market opportunities. These principally relate to:

- Identifying customers;
- Reaching customers;
- Understanding customers;
- Collaboration/working together;
- Supply side barriers - such as the understanding amongst hotels of the AT offer (and sometimes vice versa); and
- IT booking/social media.

7.23 Many of these challenges are already recognised by businesses themselves. Against a menu of potential challenges, leadership and business management is identified as the greatest challenge for activity/experience providers (41%) and the second greatest challenge for centres/attractions (53%). This is important feedback since this is an area where greater business to business collaboration could be fostered and public sector support made available (see recommendations). Increasing sales and developing/accessing new markets are prominent, the latter identified as the greatest challenge for centres/attractions at 58%. Of the challenges, e-marketing is also highlighted as a significant issue.

7.24 Although e-marketing was a significant issue, there is relatively limited recognition that e-commerce/digital capability is a challenge, particularly for activity/experience providers, where just 27% see this as a challenge (see Figure 7.3). This is more likely to reflect that businesses are not aware of its true value in helping to develop their business, and so do not see this as a challenge to be addressed. This is reinforced by the very low levels considering business innovation as a challenge (just 7% in activity/experience providers) – and fostering and creating a culture of innovation in the sector is critical to its growth and longevity.

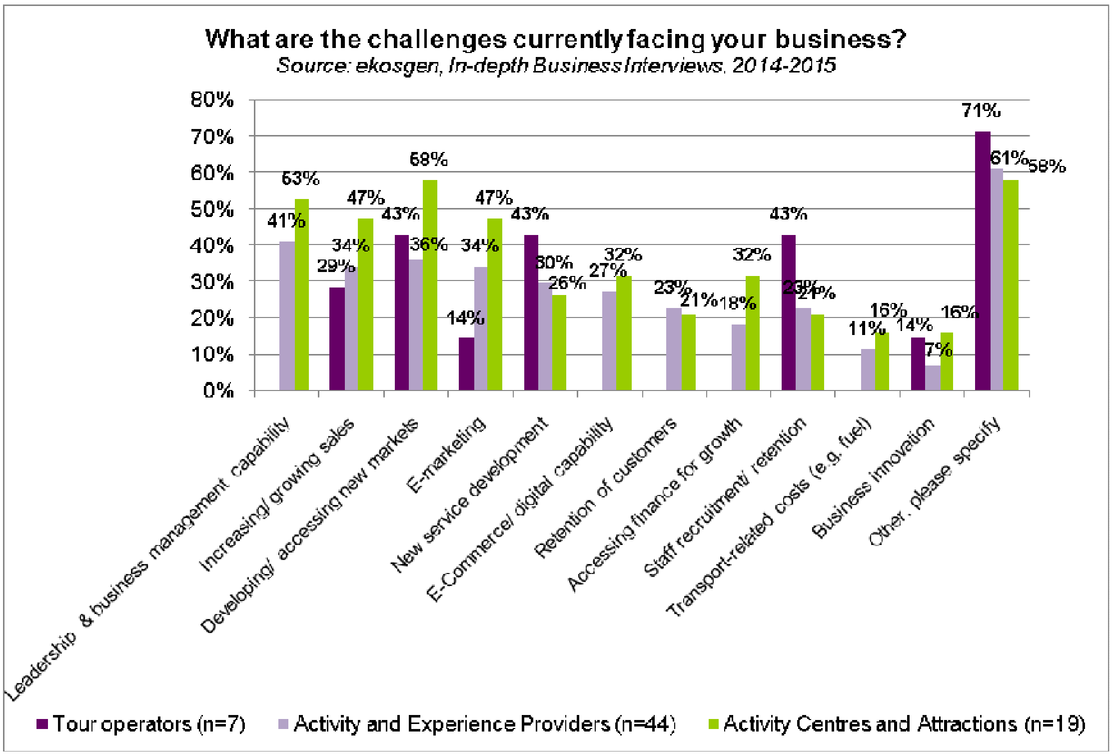
7.25 For tour operators, staff recruitment/retention is the greatest issue, identified by 43% of those consulted, alongside new service development.

7.26 A number of other responses were received, often relating to competition, geographical remoteness, infrastructural issues and wider international/ global issues. Other respondents simply cited the economy and the 'unknown.' Comments included:

> *"Difficult to access best practice from elsewhere in the world. We are very insular in Scotland and should be looking more to the United States, New Zealand etc for industry innovation"*.
>
> *"Competition (market currently over-saturated and not enough demand) - since 2010 ten more providers have set up between Glasgow and Skye. In 2010 there were 24 kayaks, in 2014… 120 kayaks. Connectivity too - chronic shortage of access to sea through parking".*

7.27 A number of businesses cited 'other' challenges. These comments tended to relate to external factors, such as the state of the economy, climate change and increasing energy costs etc, as well as logistical aspects, such as the business's (remote) location and access to high speed broadband/ 4G mobile data. Other businesses stated general business challenges combining a number of the others cited.

***Figure 7.3***




7.28 In terms of the greatest *single* challenge, it is access to finance/ funding that is most frequently cited (20%), followed by maintaining/ growing sales and customers (16%), broadly in line with the challenges identified above. However, whilst staffing is not a widespread challenge in the AT sector, where it *is* an issue, it is the single greatest challenge facing the business. This was the case for 13% of those surveyed. In the future, competition is perceived as the greatest challenge, by 15% of respondents. Maintaining/ growing sales and customers remains a challenge going forward, as does staff recruitment/ retention for those businesses who currently find this a constraint.

**Challenges/constraints for the sector**

7.29 Issues given particular emphasis by businesses are the constraints linked to the transport infrastructure and internet/broadband coverage. These are ranked 1 and 2 respectively for short term constraints in the sector. Lack of *mobile* coverage is ranked 3 in the short and medium term. The only constraint ranked as high in the medium and long term is the lack of business finance for investment. This paints a picture of a sector where growth is hampered by the lack of physical and digital connectivity. Although the rural setting for most of the AT sector products and services is likely to mean transport and digital connectivity will always be an issue to some extent (businesses are typically located in more rural areas), the strength of the feedback on the issues means they cannot be ignored.

7.30 Lack of support for staff development costs also ranks as a considerable challenge, ranked 5 in the short and medium term. Longer-term challenges relate to lack of general investment, development and growth opportunities and the lack of a good quality accommodation offer, although just a quarter cite poor accommodation as a short term constraint.

**Table 7.1: Challenges Facing the Adventure Tourism Sector**

| Challenge facing the sector | Short term (2-3 years) | | Medium term (3-5 years) | | Long term (5 years+) | |
|---|---|---|---|---|---|---|
| | % (n=63) | Rank | % (n=63) | Rank | % (n=63) | Rank |
| Transport links/ costs | 54% | 1 | 43% | 1 | 41% | 1 |
| Lack of internet/ broadband coverage | 40% | 2 | 29% | =3 | 21% | 3 |
| Lack of mobile coverage | 38% | 3 | 29% | =3 | 11% | 9 |
| Business finance for investment | 37% | 4 | 32% | 2 | 29% | 2 |
| Lack of staff development support - costs of | 27% | 5 | 24% | 5 | 10% | 10 |
| Lack of support for the sector/ business | 25% | =6 | 16% | =9 | 17% | 4 |
| Lack of investment/ development/ growth opportunities | 25% | =6 | 16% | =9 | 16% | =5 |
| Lack of good quality/ appropriate accommodation offer | 24% | 8 | 21% | 6 | 16% | =5 |
| Lack of customer demand | 22% | 9 | 19% | 7 | 14% | =7 |
| Lack of staff development support - access to | 19% | 10 | 17% | 8 | 14% | =7 |
| Other | 30% | - | 22% | - | 21% | - |

*Source: ekosgen, Survey of Businesses, 2015, n=63*

*Transport*

7.31 The issues in relation to transport relate to a number of factors including visitors being able to access destinations, and also the ability to travel around between locations, important for individual visitors and for tour operators. Some are timetabling and integration issues, for example with respect to ferry travel (where cost is also a factor), and others the main internal routes where frustration with poor infrastructure exists. For roads this extends to the A9 and the A82 in particular. Rail transport, especially to the Highlands and Islands has traditionally been poor in terms of frequency and capacity which can undermine the visitor experience, although the new franchise for operating the Scotland rail network promises some significant improvements. Some frustrations are the extent to which the public transport providers are inflexible – such as buses not carrying skis.

*Internet and Mobile Coverage*

7.32 This really is becoming a big issue for many AT businesses, and there are increasing complaints about the inadequacy of the coverage. Partly this relates to consumer expectations and the rate at which this is changing. For example, millennials have high expectations, coupled with a shortening internet attention span. For most, they are expecting 3G/4G connectivity in hotels and, in many cases, when undertaking their outdoor activities. There is a lack of basic access at key locations such as Glencoe, and for sailing, a key adventure sub-sector, the lack of coverage shore-side is acting as a disincentive for potential visitors. Some of these areas may see benefits through the Digital Scotland Superfast Broadband project, although those in the most sparsely populated areas may need alternative solutions. However, competing with better digitally connected locations is becoming a challenge for businesses.

*Other Factors*

7.33 Wider discussion with businesses suggests the issue of *accommodation* is a greater constraint than indicated by the business survey. For many AT sector businesses, the lack of cross-selling and understanding of AT amongst the accommodation sector is an ongoing issue. It is suggested by AT businesses that many accommodation providers still have no website and many more do not understand/know what outdoor activity is available.

7.34 A number of *destinations remain very traditional* in their outlook and approach. One example is Loch Ness and its traditional reliance/catering for coach tours. Here, it is argued, that AT is not on the accommodation radar. It is hoped that the Uniqueness Tourism Business Improvement District (BID) will address this by bringing businesses together and creating more of a destination. Some of its key aims are to increase visitor numbers, the length of stay, and improve the visitor experience, with the overall aim of helping tourism businesses in the Inverness and Loch Ness area to *"compete more effectively with other tourism destinations elsewhere in Scotland, the UK and worldwide."*[35] The Business Plan does not explicitly refer to 'adventure tourism', but it does recognise the potential to promote the area as an 'outdoor destination' and maximise the area's attraction to visitors who are keen to participate in outdoor activities, such as walking trails, cycling and canoeing.[36]

7.35 There is also a need for AT businesses to understand buying behaviours, for example the lack of pre-booking amongst Chinese visitors. Further, whilst the promotion of AT has improved, most think more could still be done. New Zealand and Norway, for example, are perceived as much better at marketing/raising profile, as was detailed in Chapter Six.

7.36 Overall the constraint to growth is not the offer. As the benchmarking illustrates, Scotland has greater provision and more activity providers than its competitors. There is, however, a generally modest level of proactivity in the sector relating to developing new markets (e.g. use of Trade Fairs, forging partnerships). There is also the fact that Scottish people do not sell Scotland, unlike Canada or New Zealand, where the whole country and people are seen as 'outdoors'.

7.37 One way to achieve growth, particularly in relation to soft adventure, is to lenghten stays. This means promoting the soft adventure offer, for example as a place to relax. Although many AT businesses do not wish to dissuade the volume day trip/whistle stop tour

[35] http://www.uniqueness.co.uk/
[36] http://www.uniqueness.co.uk/wp-content/uploads/2013/04/ILNBID-FINAL-ARTWORK.pdf

market (since their business can be dependent on it), there is nonetheless the opportunity for these short/day trips to act as 'taster' visits which can, in turn, lead to longer repeat visits. Indeed, the two are not mutually exclusive, and there is scope for activity providers (often day providers) to continue to provide for volume visitors and for soft adventure and longer days to be promoted and increased.

## Workforce Issues

7.38 The in-depth business interviews explored the issues of workforce. A general point here is that workforce issues are not typically seen as the greatest challenge for activity/experience providers or for centres and attractions. Recruiting and retention of staff is, however, the greatest issue for tour operators.

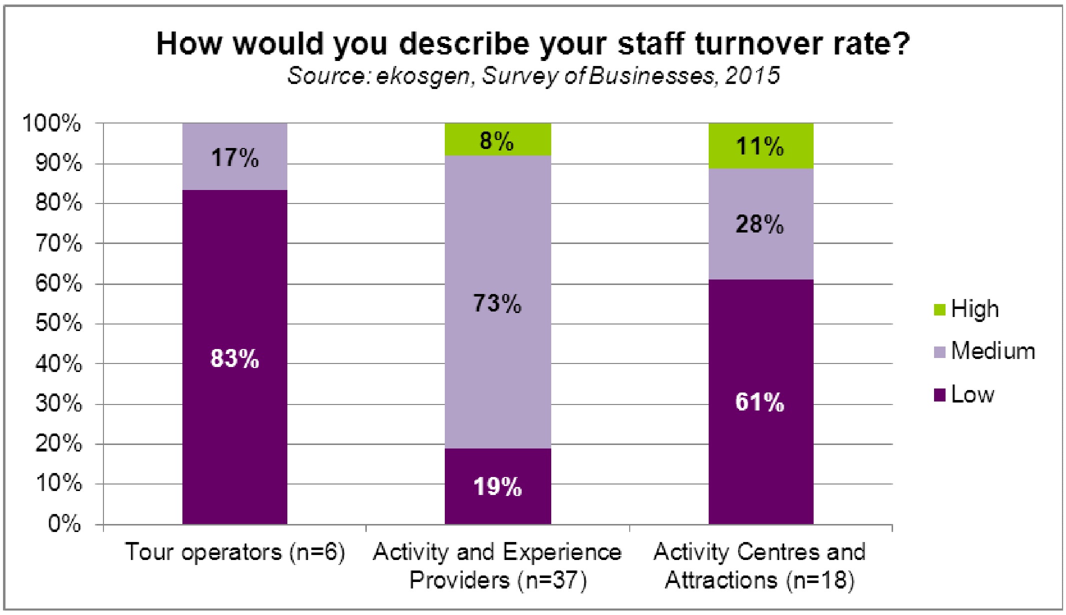
7.39 On average, AT businesses find it neither difficult nor easy to attract skilled employees. Similarly, few businesses identify significant skills gaps, although there are likely to be some unrecognised gaps around digital skills or the need for particular qualifications amongst employees in particular sub-sectors.

7.40 Further, businesses are generally satisfied with the level of skills development support/ training available within the sector, being rated, on average, most highly amongst activity and experience providers at **3.38** out of five; activity centres and attractions gave an average rating of **3.00.** Tour operators were generally less satisfied, with an average of **2.60**, a likely reflection of staff recruitment/retention being a greater issue for them.

7.41 While businesses in general highly valued the training/ support that is available, some did comment on its cost, especially if employees need to travel to Edinburgh or Glasgow, or even further afield, to attend courses.

7.42 With respect to staff turnover and reasons for high or low staff turnover levels, few businesses identify significant issues. Turnover is highest amongst activity and experience providers, with 73% rating their turnover as medium, while 83% of tour operators and 61% of activity centres and attractions rate it as low. That said, staff turnover levels could be better, with 11% of activity centres and attractions and 8% of activity and experience providers regarding their staff turnover rate as high. Seasonality was cited as affecting turnover levels amongst a number of respondents.

***Figure 7.4***




7.43 Those with low turnover consider this to be because the AT sector is an attractive sector to work in (29%) or because the company offers year round employment opportunities, or that the employee benefits are attractive (both with 27%). One in five thought this was because the company is a recognised industry leader, while 10% thought it was because the company offers career progression opportunities. 'Other' responses included:

> *"Our guiding team are employed on a sessional basis. We offer training and equipment deals to retain our guides. This has resulted in guides who have been running trips for us for over 10 years"*
>
> *"All employees enjoy outdoor activities, find it satisfying"*

7.44 That said, there is a wider perception that a career in AT is not a 'proper paid job' due to seasonality and the ad hoc nature of contracts, which are often short-term and driven by demand. Yet many AT roles are specialist/ technical in nature, and require certification/training, including skills in coaching which require a high degree of professionalism.

7.45 The group discussions identified that there remains a relatively weak culture of customer service in the AT sector and the supply chain and that this needs to be broadened/embedded. This was also reflected on by some survey respondents, who emphasised the importance of customer service within the industry. The businesses said that the importance of customer service skills was not always realised by employees seeking work in the sector. Part of this relates back to the outdoor offer needing to be valued, including by locals, who are often highly important to the overall visitor experience.

7.46 It is recognised in this review that skills issues are, at least to some extent, being actively addressed. Skills Development Scotland are working to address issues around soft skills and HIE have already commissioned Wild Scotland to further develop guiding training. A three year multi agency Digital Tourism programme has been developed following a pilot phase to help businesses understand and make better use of digital technologies.[37] More can be done, however. Where gaps remain, this includes the need for some specialist knowledge

[37] Please see: http://www.hie.co.uk/growth-sectors/tourism/digital-technology/digital-tourism-pilot.html

required for (small) providers, for example, insurance for guided walks and, importantly, guidance/knowledge/training for accommodation providers on the AT sector and its offer generally.

## Business Support Needs

7.47 Support needs broadly reflect the areas in which businesses consider that they have challenges. For activity and experience providers it is accessing new markets and growing sales, as well as growth finance. Centres and attractions seek finance for growth and new markets and sales. Of those who noted other forms of support, comments included:

> *"…There is a need for coordinated support at a higher level - HIE and VS need to play a bigger role. There is a need to link businesses, venues and locations e.g. a whisky trail for yachts, fine dining culinary cruises, wildlife cruises"* (Activity and Experience Provider)
>
> *"Would benefit from technical support around internet, IT, tills, cameras etc. and also with staff recruitment e.g. would be really helpful to have graduate scheme of some sort to help recruit skilled employees"* (Activity and Experience Provider).

**Table 7.2: Business Support Needs of the Adventure Tourism Sector**

| | Activity and Experience Providers | | Activity Centres and Attractions | |
|---|---|---|---|---|
| **Business Support need** | **% (n=44)** | **Rank** | **% (n=19)** | **Rank** |
| Developing/ accessing new markets | 41% | 1 | 53% | 2 |
| Increasing/ growing sales | 36% | =2 | 47% | =3 |
| Accessing finance for growth | 36% | =2 | 58% | 1 |
| E-marketing | 34% | 4 | 47% | =3 |
| Transport-related costs (e.g. fuel) | 30% | 5 | 26% | 7 |
| Staff recruitment/ retention | 27% | 6 | 32% | =5 |
| E-commerce/ digital capability | 23% | 7 | 21% | =8 |
| New service development | 18% | 8 | 32% | =5 |
| Business innovation | 11% | 9 | 21% | =8 |
| Retention of customers | 11% | 10 | 16% | =9 |
| Leadership and business management capability | 7% | 11 | 16% | =9 |

*Source: ekosgen, Survey of Businesses, 2015, n=63*

7.48 In terms of the form of business support received or required almost half the businesses currently have access to/receive networking opportunities (48%). Perhaps unsurprisingly, businesses are seeking finance to invest, although it is not clear that all businesses know what that finance would or could be used for. Almost four in 10 would benefit from strategic planning type support.

7.49 For all categories, other than networking, the number of businesses stating they would benefit from support is higher than the number of businesses that currently receive this form of support (see Table 7.3). The greatest disparity in terms of support required and received relates to finance for investment, which 20% receive but 56% feel they would benefit from. This is followed by strategic planning support (11% receive but 39% would benefit), and innovation/R&D support (less than 10% receive this currently, whilst 22% would welcome this).

| Table 7.3: Business Support Received and Desired in the Adventure Tourism Sector | | | |
|---|---|---|---|
| **Form of Business Support** | **Currently Receive % (n=54)** | **Would Benefit From % (n=54)** | **Percentage point difference** |
| Finance for investment | 20% | 56% | -36 |
| Strategic planning | 11% | 39% | -28 |
| Web development | 26% | 33% | -7 |
| Networking opportunities | 48% | 31% | 17 |
| Sales/ marketing | 28% | 30% | -2 |
| Leadership and management | 15% | 26% | -11 |
| E-commerce/ digital sales | 15% | 24% | -9 |
| Workforce development | 13% | 24% | -11 |
| Innovation/ R&D | 9% | 22% | -13 |
| Staff recruitment/ retention | 13% | 19% | -6 |
| Other | 19% | 37% | -18 |
| *Source: ekosgen, Survey of Businesses, 2015, n=54* | | | |

7.50 Many of the support needs identified in the sector relate mainly to the provision of advice. This includes networking opportunities, strategic planning, e-commerce/digital sales and sales/marketing. In terms of training provision, this related mainly to leadership and management, web development and workforce development. Financial support was primarily sought for investment, though web development and sales/marketing were also key.

| Table 7.4: Type of Business Support Desired by the Adventure Tourism Sector | | | |
|---|---|---|---|
| **Type of Support** | **Advice** | **Training** | **Finance** |
| Networking opportunities | 33% | 4% | 14% |
| Strategic planning | 29% | 20% | 6% |
| E-commerce/ digital sales | 27% | 8% | 12% |
| Sales/ marketing | 27% | 16% | 22% |
| Staff recruitment/ retention | 20% | 6% | 4% |
| Innovation/ R&D | 18% | 8% | 6% |
| Web development | 14% | 24% | 29% |
| Workforce development | 8% | 20% | 18% |
| Finance for investment | 6% | 4% | 61% |
| Leadership and management | 6% | 29% | 2% |
| Other | 12% | 2% | 10% |
| *Source: ekosgen, Survey of Businesses, 2015, n=49* | | | |

## Summary

7.51 Overseas markets are a key growth opportunity, especially for tour operators, who recognise and target international visitors. At the same time, the whole sector would benefit from more international customers, with activity and experience providers and centres and attractions requiring improved (internet-based) ways to access these markets. Different age groups - young people and in particular the millennials – are a growing market, yet their needs and preferences are different to older generations, particularly where digital connectivity and environmental values are concerned.

7.52 Families are recognised as a growth market opportunity, and these are likely to seek a broader range of activities related to the outdoors, of which adventure may form a part. For centres and attractions, education-related and staycations are existing key markets, and there may be further growth potential here. Centres and attractions are also the part of the AT sector most likely to see renewed interest from the corporate market as the economy strengthens, as evidenced at 7.9.

7.53 There is undoubtedly growth potential from new and emerging overseas markets, where they currently form a small (but growing) part of the customer base. This extends to Asia and South American markets. That said, the largest overseas markets are Europe, Scandinavia and North America, and there is considerable further potential to exploit these markets.

7.54 Scotland and the UK are the largest markets for activity and experience providers and for centres and attractions, and again these markets are not fully tapped into, with the domestic (Scottish) market for adventure (linked to healthy living) seen as a major opportunity for new business.

7.55 Accessing these new markets may not be straightforward, and Scotland will continue to face competition from existing and new locations. AT sector businesses find it challenging to identify and reach new customers, allied to a weak approach to e-marketing and online activity. There are broader constraints to future growth in the sector, linked to poor transport links and integration, and broadband and mobile coverage. The latter may significantly undermine the ability of the Scotland adventure market to remain competitive going forward.

7.56 Workforce issues are, however, not generally perceived as significant amongst AT businesses; skills gaps, where they do exist, generally relate to specific sub-sectoral qualifications. Nevertheless, businesses are generally satisfied with the level of skills development support and training, although some did comment on its cost.

7.57 With the notable exception of tour operators, staff recruitment and retention is not a general barrier to growth in the sector, although where it is an issue it is a significant one. More fundamental is business leadership and management capability. This is restricting growth and the most frequently cited business challenge. Improved, AT sector specific support in this area may help unlock this constraint; as would new routes to market.

7.58 In terms of the sector more widely, Scotland's offer for AT is very strong, but there is a need to provide support for it to be sold and marketed more effectively, capitalising on its strengths and unique selling points, particularly internationally.

# 8 Conclusions and Recommendations

8.1 This has been a wide ranging review with extensive industry involvement and engagement. The review draws some important conclusions, and makes a number of recommendations for the AT-sector.

## Overall Conclusions

8.2 Scotland is a world-class destination for outdoor leisure, 'adventure' tourism and wildlife watching. This much is acknowledged by DMO leaders and the international trade body (ATTA) alike. The evidence indicates that AT businesses expect growth and tour operators want to do more business here. What they need are the practitioners who meet their standards of operation – web-savvy, with a high-end product and solid ethical credentials, with indications that in some of these areas at least, such as digital skills, there is room for improvement.

8.3 Scotland's natural capital ranks with the very best in the world and is contained in a relatively compact, accessible area, with the offer ranging from sub-arctic mountain conditions and scenery, to mini alpine ranges and ridges, and through native Caledonian pine forests and Atlantic oak woodlands to richly bio-diverse coastal margins and pristine marine environments. This view is shared not just by stakeholders but also by the ATTA.

8.4 What emerges through analysis of the businesses base and the views of stakeholders and consultees, is that there is a growing outdoor-active community, including both indigenous Scots and those who have settled here from around the world, but particularly the rest of the UK. This affords a complementary fund of human capital, committed to the outdoors, proud of the land and seascapes. This can allow general promotion of the AT sector, through word of mouth, and harnessing this interest more actively, for example through recruitment into the sector. Throughout, there is the potential for excellent product development, and for growth in the sector.

## Market Opportunities

8.5 The current clusters approach based on developing adventure hubs is an important way to take advantage of market opportunities. What is also required is for the customer typologies that have been developed to be further utilised to effectively target the appropriate demographic, using age-relevant social media to stimulate the awareness and intention via meanings, values and behaviours of the consumer groups. Fashion, ideologies, and explorers' interests in people and landscape, escape from technology, a return to the 'wild' – all are significant motivations for high-spending consumers visiting other destinations such as Iceland, Greenland and Norway.

8.6 Yet, Scotland offers very real scope for attracting new customers to its quieter, wilder places, such as Glen Feshie, Glen Affric, the Small Isles, Sutherland and Dumfries and Galloway. For consumers of these experiences, the 'activity' is unimportant, or at best secondary: a way to access the outdoors sustainably, via kayak, bike, sail or on foot. It would be a mistake to over-focus on activities which seem to reflect adventure with a capital 'a': these are smaller markets and miss much of what is 'Scotland's great outdoors' – the brand. Therefore 'hubs', 'honeypots' and 'destinations' are as important, overall, as the points of departure.

8.7 Overall, the report suggests Scotland's outdoor offer is something beyond what is traditionally labelled as adventure tourism activities – rather it is something embedded in its rugged landscapes, history and culture, but also in tune with 21$^{st}$ century concerns of sustainability, green ethics, popular access to the outdoors and healthy activity in fresh air for all generations.

## Sector Constraints

8.8 There is a general lack of world-market awareness amongst operators and DMOs, many of whom acknowledge that to determinedly target client countries such as India, China and Russia, they would need publicly funded support, and some training in the culturally-specific needs of those client groups.

8.9 There are also too few innovative operators, keen to develop their offer to the consuming public and harness information technology to communicate and sell their experiential products to a discerning international audience. There is a need to expose current operators and future market entrants to the latest and best products on the global market. What are leading countries doing to push their offer ahead of their competitors? The answer, according to ATTA and many DMOs, is simple: move away from the narrow focus on activities, and look at the broader meanings taken from people's engagement with the great outdoors. This involves using all the seasons, the local culture, local food, music, arts, stories, histories and services to produce a total, rich and authentic product – Scotland *is* wild, rugged, and sparsely populated – but so are many places. It is the whole experience on every level that comprises Scotland the brand and its sub-brands.

8.10 The importance of Scotland's 'natural capital' is very much underestimated, whilst the economic / market importance of its adventure product is both over sold and misunderstood. This represents a small fragment of the broader outdoor tourism market both nationally and internationally – most people come to 'be' in the great Scottish outdoors, and only a relative few (perhaps 10%-15%) actually go out to 'do' or to 'buy' adventure.

8.11 Feedback from some of those in the sector suggests the adventurous labelling *can* be enticing, but also exclusionary and that many consumers feel that they do not have the personal skills, time or physical tools to undertake long, arduous journeys in wilder places, and are no longer young and/or fit enough to properly experience what Scotland has to offer in this regard. Where this perception exists, efforts should continue to counter this. Studies of other countries, particularly Scandinavian ones, suggest that hugely pleasurable, memorable experiences can be had via short journeys, easy overnight camps, roadside wildlife watching and opportunities/ encouragements to spend time in pristine natural places. Whilst this undoubtedly happens in Scotland, there is an opportunity to increase the number of these types of visits and experiences.

8.12 Although the evidence from the review encouragingly indicates that the AT sector is succeeding in extending the season, there remain seasonality issues. These can compromise efforts to professionalise the sector and also to innovate and encourage both new product development and further season-stretching interventions. Products which are specifically predicated on the currently less-valued times of the year for visitors should be developed. These times of the year can be peaceful, offer the possibility for greater 'local' immersion, and display the challenges and differences of the lives lived in Scotland's landscapes and climate.

8.13 There also exists no clear, formal, or 'known in common' understanding of what Scotland's 'adventure tourism' offer comprises. The breadth of the offer means the sector can encompass everything from the good bars, restaurants, B&Bs, campsites and hotels, to its travel infrastructure (which, from a public transport perspective is poor and deteriorating), to what target markets might understand as the whole richness of Scotland's great outdoors. This 'great outdoors' includes indigenous culture, green values and ethos and an understanding of flora and fauna in the landscape. The implication for the adventure tourism sector in Scotland is that there is a continuing need to develop links between the different parts of the sector and with supply chain infrastructure to maximise the offer and thus visitor experience.

8.14 To an extent, a lack of professionalism in the sector continues to exist, in part due to the over-focus on adventure activities mentioned. As well as technical qualifications for activities (where Scotland is strong) there is a need for Scotland's outdoor industry 'to raise its game' in terms of the development of its guiding and interpretation skills (work is being done to develop guiding training), as well as its innovative entrepreneurialism. Skills/knowledge should cover wild places, the people, history, geology, biodiversity and so forth. These would all help to support and create the destination branding required.

## Recommendations

8.15 The review makes a number of recommendations. These are largely high level. It is for industry and the public sector agencies and authorities with a remit to support the sector to respond to the recommendations and the evidence in the review. In the case of the public sector, any response should at all times be with the intention of helping to overcome market failures in the sector, such as lack of information or skills in AT businesses.

***The Offer***

8.16 As the review demonstrates, Scotland possesses a high quality product. However, the experience of that product, and the connections between the different parts of the offer, are under-developed and therefore there is a need to join these better. Further, business to business collaboration and cross-selling of products, offers and destinations remains under-developed. Where it is undertaken effectively, the value of the AT offer can be enhanced considerably.

8.17 It is recommended that there is **consideration given to better linking together the different AT offers and assets.** This may include the landscape, scenery and nature through offering related activities, routes and journeys at a destination level, for example where day operators develop linked food and drink and accommodation offers to create a more joined up experience for visitors. This may in turn require building more business to business relationships. It may also include developing the AT offer around place, history, wild food, stories, culture, music and so on, to further broaden the offer beyond hard adventure. Businesses can be helped to better understand the benefits of working in partnership, with improved mechanisms for doing so.

8.18 In linking the AT offer and assets, it is also recommended that there is continued promotion and facilitation of the **combination of complementary activities to further stretch seasons**, ideally for the full year, such as mountain biking developments around ski centres or indoor activities. There is some evidence this is happening, although the AT sector still demonstrates a largely seasonal pattern. There are various ways in which the season can be extended, including the use of events to raise the profile of the AT sub-sectors and provide an opportunity for consumers to experience Scotland. They can also act as a draw for first time visitors.

### *Accessing Markets*

8.19 Given the 200% growth in the AT sector globally in the last three years, there is considerable interest in adventure tourism worldwide. There is, therefore, a very large international market that could potentially be accessed. That said, AT businesses in Scotland do not typically know how to access these customers.

8.20 It is recommended that a range of support mechanisms are developed to further help **businesses to access international growth markets**. These include the new and emerging markets such as BRIC and MINT countries to help enable businesses to offer more 'tailor-made' experiences and cultural understanding. Support to businesses could include market research and attendance at trade fairs/events (as applies in a number of other sectors). There may also be the need to develop more culture-specific products. Businesses can also be supported to help access UK markets, particularly at off-peak times (linked to extending the season under 'Offer' above).

### *Infrastructure*

8.21 There are two key infrastructure issues that act as a constraint to developing the sector: transport and digital connectivity. The latter is being addressed by the roll out of Next Generation Access across Scotland, although care should be taken to ensure that business take-up and use of the available technology is maximised and that alternative solutions to areas not set for coverage are explored.

8.22 With respect to **improving ICT communications/ broadband coverage and internet-based support**, it is recommended that increasing online bookings and web-based information sources and search engines is championed, and that AT sector businesses are supported to develop their online and e-commerce capabilities. More broadly, there remains a need for faster/ better broadband connections, especially in rural areas and more reliable connections to facilitate growth. The lack of high quality, reliable wifi access can also hinder last minute and chance business promotion.

8.23 With respect to **improving public transport connections**, there is an identified need for improvements with regard to trains and ferries in particular, including connections between different types of public transport. Major infrastructure upgrades are not within the scope of this study, yet maximising the opportunities afforded by the new ScotRail franchise and lobbying for better integration of transport and timetabling should be a priority for the AT sector. More specifically, there may be a need to develop and further improve shore-side facilities, given that the marine and coastal sub sector remains the largest AT sector, and evident concern that shore-side facilities are not meeting the requirements of many sailing visitors.

### *Training*

8.24 In general, many of the workforce and skills development needs of the sector are being met, however the issue remains important to ensuring that the broader appeal and value of the AT sector is promoted and communicated to visitors. This is linked to developing the offer more widely, and includes support to supply chain businesses, accommodation providers and restaurants in particular, to help them to understand the AT sector offer.

8.25 It is recommended that, as well as the guiding courses and softer hospitality skills support available and under development, there may be the need for **wider training for accommodation and food and drink providers**, so they understand the value of the AT sector, and in turn, can better communicate and promote this to customers. Training has been funded in the past, and learning resources have also been produced (TIS guides). It may be worth reintroducing training and refreshing the guides. Some form of support to understand the cultural requirements of different market groups may also be valuable.

8.26 More widely, businesses in the AT sector identify a need for **developing their leadership and management skills**. Whilst this issue is already recognised as a need by those involved in supporting the AT sector, the evidence is strong that this is an area where businesses face particular challenges. This may also be linked to the benefits of developing *highest levels* of soft skills, wildlife and land/seascape interpretation and interpersonal (hospitality) skills in the AT sector, to deliver very high levels of customer service.

***Marketing and Branding***

8.27 There is a general message that the quality of the offer relating to wild Scotland and its outdoors as a whole could still be better communicated to consumers – despite improvements in recent years. This relates to a number of the points above such as the **continued promotion of the 'soft' adventure side of the sector**. There is a need to make the sector as a whole attractive. Scotland has an enviable offer, and this needs to reach more potential customers.

***Public Sector Support***

8.28 The public sector – working with and alongside industry where there is a clear market failure rationale for doing so – can have a significant input to supporting the AT sector. Public sector agencies also have a strategic role to play in helping join up different parts of the offer.

8.29 It is recommended that **public sector agencies play a lead role in joining up and integrating connected agendas:** the public sector partners can help facilitate AT sector growth by promoting integrated partnerships across the whole of the adventure tourism sector – bringing together AT businesses and supply chain activities and required infrastructure (transport, accommodation, activities, food and drink, digital connectivity).

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# Appendix A: Methodology

## Introduction

This appendix details the methodology used by the study team for this commission, and outlines the assumptions which were made throughout the research.

## Review Method

### Existing Document Review

The first stage was to review existing published reports and studies. A list of reviewed documents is provided below. A matrix was set up to analyse the documents, recording information on the following fields where available:

- Author, title and year
- Geography
- Definition(s) of Adventure Tourism used
- Notes on the scale of the sector (size, shape and composition)
- Geographies reported upon
- Sub-sectors reported upon
- Names of any businesses/ key players mentioned
- Notes on the scale of market demand
- Growth opportunities noted
- Notes on barriers/ constraints to growth
- Notes on international benchmarks

| Author(s) | Year | Title | URL (where available) |
|---|---|---|---|
| Adventure Travel Trade Association | N/A | Adventure Travel Development Index | http://www.adventureindex.travel/partners.htm |
| British Marine Federation Tourism | 2014 | The economic contribution of boating-related tourism in the UK | |
| Bryden, D.M., Westbrook, S.R., Burns, B., Taylor, W.A., and Anderson, S. | 2010 | Assessing the economic impacts of nature based tourism in Scotland Scottish Natural Heritage Commissioned Report No. 398. | http://www.snh.gov.uk/docs/B726802.pdf |
| Easto, P. and Warburton, C. | 2010 | Adventure Tourism in Scotland: Market Analysis Report | |
| Easto, P. and Farnbank, M. (Wild Scotland) | 2012 | Adventure Tourism in Scotland: Environmental Issues and Best Practice | http://www.academia.edu/6547612/ADVENTURE_TOURISM_IN_SCOTLAND_ENVIRONMENTAL_ISSUES_and_BEST_PRACTICE |
| George Washington University and Adventure Travel Trade Association | 2013 | Adventure Tourism Market Study 2013 | http://www.fairtrade.travel/uploads/files/ATTA_-_Adventure_Tourism_Market_Study_2013.pdf |
| Highlands and Islands Enterprise/ Scottish Enterprise | 2011 | Scottish Snowsports Strategic Review: Part A | http://www.hie.co.uk/common/handlers/download-document.ashx?id=094fea5b-058e-419c-91ee-f64448e7da5c |
| Highlands and Islands Enterprise and Scottish Development International | 2011 | Inverness and Moray Accommodation Audit | http://www.hie.co.uk/common/handlers/download-document.ashx?id=7fbe4e2b-551a-4fa8-b432-609328e7d662 |
| Scottish Government | 2010 | The Economic Impact of Wildlife Tourism in Scotland | http://www.gov.scot/Resource/Doc/311951/0098489.pdf |
| Scottish Tourism Alliance | 2013 | Tourism 2020: The future of our industry, in our hands: A strategy for leadership and growth | http://scottishtourismalliance.co.uk/wp-content/uploads/2013/03/Scottish-Tourism-Strategy-TourismScotland2020.pdf |
| Scottish Enterprise | 2002 | World Class Tourism Clusters: Initial Research on Australia | |
| Scottish Enterprise | 2010 | Sailing Tourism in Scotland | |
| Skills Development Scotland | Not known | Proposal to Support Credit Rating within Regions through the CDN Quality Development Network | |

| Author(s) | Year | Title | URL (where available) |
|---|---|---|---|
| Skills Development Scotland | 2014 | Adventure Tourism and Youth Unemployment – A Way Forward | |
| University of the Highlands and Islands: Centre for Recreation and Tourism Research | 2013 | Review of Mountain Biking Developments and Potential Opportunities in the Scottish Enterprise Area | |
| Visit Scotland | 2003 | The Market for Extreme/ Adventure Sports Tourism | |
| Visit Scotland | 2006 | Forecast for Adventure Tourism in Scotland to 2015 | http://www.visitscotland.org/pdf/cycling_2006_to_2015.pdf |
| Visit Scotland | 2007 | What will activity and adventure tourism look like in 2015? | http://www.visitscotland.org/pdf/adventure_tourism_forecast_march_07.pdf |
| Visit Scotland | 2007 | Adventure Sports Omnibus Survey | |
| Visit Scotland | 2012 | Scotland Visitor Survey | http://www.visitscotland.org/research_and_statistics/visitor_research/all_markets/scotland_visitor_survey.aspx |
| Visit Scotland | 2013 | Pan Island Visitor Survey | http://www.visitscotland.org/research_and_statistics/visitor_research/all_markets/islands_visitor_survey.aspx |
| Visit Scotland | 2013 | Tourism Plan for Scotland | http://www.visitscotland.org/what_we_do/tourism_development_plan.aspx |
| World Tourism Organisation (UNWTO) | 2014 | Global Report on Adventure Tourism | |
| Zovko, I. (Transform Scotland) | 2013 | The Value of Cycle Tourism: Opportunities for the Scottish Economy | http://transformscotland.org.uk/wp-content/uploads/2014/12/The-Value-of-Cycle-Tourism-full-report.pdf |

**Stakeholder Consultations**

A programme of stakeholder consultations was completed with a range of partner agencies and trade bodies. In all, 24 individuals were consulted. The table below details the organisations from which stakeholders were consulted with:

| Organisation |
|---|
| Adventure Travel Trade Association |
| British Marine Federation |
| Cairngorms National Park Authority |
| Cycle Tourism Forum |
| Destination Skye & Lochalsh |
| Developing Mountain Biking in Scotland |
| Forestry Commission |
| Highlands and Islands Enterprise |
| Moray Speyside Tourism |
| Mountaineering Council of Scotland |
| Outer Hebrides Tourism Industry Association |
| Orkney Tourism Group |
| Sail Scotland |
| Scottish Canals |
| Scottish Adventure Activities Forum |
| Scottish Development International |
| Scottish Enterprise |
| Scottish Tourism Alliance |
| Shetland Tourism Association |
| Skills Development Scotland |
| Ski Scotland |
| TS2020 Champion – Nature and Activities |
| Visit Scotland (x2) |

The consultations covered understanding and definition of the AT sector; AT visitors; supply and demand within the sector; the supply chain; collaboration; marketing; Scotland's comparative advantage and innovation; and emerging opportunities (including any barriers/ challenges for growth).

**Sector Mapping Exercise**

Running concurrently to the above stages was the sector mapping exercise, which involved a number of different stages and lines of enquiry to identify as many AT businesses across Scotland as possible.

Initially, as part of the desk review detailed above, the researchers made notes of any businesses mentioned in reports and previous research to be included in the exercise.

Secondly, Steering Group members sent over existing details they held of AT businesses across Scotland. The team then reviewed these details to remove potential duplicates and discount any businesses who were outwith the scope of the research as detailed in the limitations below (e.g. accommodation providers or other businesses within the supply chain but that are not directly involved in delivering adventure tourism activities).

The Steering Group also provided details of partner agencies, DMOs, trade bodies and other organisations that may have access to a database of businesses, or be able to provide guidance on how to identify businesses. The research team contacted each of these 'gate keepers' a minimum of three times (either by telephone or email or both) and liaised with key contacts to obtain details of AT businesses that they were aware of. Depending on the availability of database contacts and each organisation's/ body's data protection guidelines, a variety of responses were received. Of those who were able to offer some form of support, the breakdown is summarised in the table below:

| Status | Number | Percentage |
|---|---|---|
| Provided database | 14 | 67% |
| Signposted to website | 5 | 24% |
| Circulated an online proforma on our behalf | 2 | 10% |
| Total | 21 | 101% |

*Please note, percentages may not sum due to rounding*

In all, 351 AT businesses were identified across Scotland through the mapping exercise. Of these, 217 business proformas were completed (62% of the database) providing basic business details on their location, offer, employment, turnover etc., to allow the research team to map the sector. All entries were then verified. Where details were not available from businesses, the team inputted as much information as possible from desk-based searches.

Whilst this is good coverage, the authors are aware that this is not full and complete coverage, and some businesses may not be covered by the study. In particular there are some geographic areas that are under-represented (such as Glasgow, Edinburgh, Angus, Argyll and Bute, Scottish Borders and Dumfries and Galloway given more limited responses from the local DMOs), and potentially some sub-sectors, although all of the sub-sectors are covered by at least one member/trade organisation. Very small businesses are under-represented, notably guides and other one person businesses, and this was to be expected from the outset given their smaller size/scale of operation.

**Adventure Tourism Business In-depth Interviews**

In total, 71 in-depth interviews were completed across the three business types: Activity and Experience Providers, Activity Centres and Attractions and Adventure Travel Tour Operators. The majority of these were telephone surveys, although a small number of responses were received online.

This approach sought to gain representation by geography (whether the business was based in the Highlands and Islands, Central Belt or the borders), business size (number of employees), business type (of the three groups identified above) and sub-sector of activity. Only businesses that had been willing to complete a mapping questionnaire, and had provided their consent to be re-contacted for a more in-depth survey, were re-contacted.

The table below details the number of each business type surveyed, relative to the wider mapping database. Please note that a number of businesses were classified as both activity and experience providers and activity centres and attractions, so the totals sum to more than 71.

| | Total No. (mapping) | Percentage | Survey sample no. | Percentage |
|---|---|---|---|---|
| Activity and Experience Providers | 264 | 76% | 54 | 76% |
| Activity Centres and Attractions | 74 | 21% | 22 | 31% |
| Adventure Travel Tour Operators | 16 | 5% | 7 | 10% |
| Total no. of entries/ responses | 351 | | 71 | - |

The questions asked of activity and experience providers and activity centres and attractions were the same, while the adventure travel tour operator survey asked a few additional questions that related to the sector in Scotland more widely and Scotland's particular strengths and weaknesses.

The interviews covered questions about respondents' businesses' background, approaches to sales and marketing, their perspectives on the current and future market with regards to adventure tourism and the current challenges and opportunities facing their business, as well as the support needed for business and sector development and growth and future investment plans.

**Workshops**

Three workshops were held as completed for the research:

- One was held as part of the Wild Scotland annual conference on 26th November 2014 with representatives from businesses, trade bodies and other partner organisations and stakeholders;
- One was hosted by UHI at the Centre for Recreation and Tourism Research for UHI staff on 30th January 2015; and
- One was held with seven individuals from businesses who had participated in either the mapping exercise or business surveys. This was held at the UHI campus in Fort William on 5th February 2015.

The workshops covered similar areas as the topic guides and business surveys but allowed a forum for stakeholders to discuss their views and share ideas.

## Benchmarking Exercise

The benchmarking exercise involved identifying comparator locations (both national and local clusters), devising and agreeing the relevant benchmarking indicators and carrying out the exercise. The locations and indicators were agreed with the research team.

The countries chosen were Iceland, New Zealand, Norway, England, Wales and Chile. These were benchmarked against a range of indicators:

- Framework/programme for personnel qualifications:
- Ease of access
- Brand effectiveness
- Is there a national tourism policy/strategy – with explicit support for adventure?
- Safety framework in place
- Marketing
- Population density per square km.

The localised clusters (largely within Scotland) identified were Queenstown, New Zealand; Whistler, Canada; Ambleside, England; Betws-y-coed, Wales; and Fort William, Aviemore, Oban, the Isle of Skye and Peebles, all in Scotland. The indicators for these areas were:

- Number of international airports within 150km
- Number of coach routes to/from destination
- Rail connections
- On national cycle network or have cycle network
- DMO web site/app
- Online booking facilities via DMO for activities and accommodation
- Local-regional brand
- Local tourism strategy.

As well as desk research, this stage also involved contacting the DMO in each destination; the research team asked each DMO to provide good practice examples of product and service innovation and collaboration, as well as the number of business start-ups in the last two years.

## Assumptions

As detailed in Chapter 2, the following are a list of assumptions which were made for this study:

9 Golf activity is not classed as Adventure Tourism.

10 Go-karting and segway activity is not classed as Adventure Tourism.

11 Hire businesses (e.g. cycle hire) are not included in the research (unless they also provided the activity). Similar retail outlets such as cycle shops are excluded, again unless they are direct providers of activity.

12 Club organisations (e.g. Falkirk canoe club) are not included in the research, as, although some provide adventure activities, they are membership based and not typically accessed by tourists.

13 Other businesses in the supply chain (e.g. accommodation providers, hire businesses etc.) are not included in the research, unless they also provided an activity.

14 Local Authorities (councils) are not included in the research, although some may be activity providers/ centres or attractions.

15 Regional Bodies (e.g. HIE, Scottish Enterprise etc) are not included in the research.

16 International tour operators based outside Scotland are not included, although Adventure Tourism tour operators based in Scotland (who may include some tours outside Scotland as part of their business) are covered by the research.

# Appendix B: Initial Sector Mapping Proforma for Businesses

## Contact Details

| | | |
|---|---|---|
| 1. | Name of business | |
| ***Lead Contact*** | | |
| 2. | Name and position of lead contact | |
| 3. | Email address of lead contact | |
| 4. | Telephone number of lead contact | |
| ***Alternative Contact*** | | |
| 5. | Name and position of alternative contact | |
| 6 | Email Address of Lead Contact | |
| 7. | Telephone Number of Alternative Contact | |

## Business Location and Ownership

8. Please provide your full business address (including village / town / city / and full postcode) *Interviewer to code HIE Region in database*

| |
|---|
| |

9. Is this your Head Office?

| | |
|---|---|
| Yes | **Go to Q10** |
| No | **Go to Q11** |

10. If no, please provide location of Head Office? (please provide village/ town/ city and postcode)

| |
|---|
| |

11. How many sites does your business operate from (a) across Scotland, (b) outside Scotland?
*Interviewer to complete one answer per row*

| | |
|---|---|
| Across Scotland | |
| Outside Scotland | |

12. Does your business
*Interviewer to code one answer per row*

| | Yes | No |
|---|---|---|
| Have a website (if yes, capture website address) | | |
| Sell its products and services online | | |
| Have a retail outlet for selling products and services to customers | | |
| Use social media (e.g. Facebook, Twitter) | | |

13. Is your business classed as a ….
*Interviewer to code business to one category*

| | |
|---|---|
| Sole trader | |
| Private company limited by guarantee | |
| Private company (other) | |

| | |
|---|---|
| Social enterprise | |
| Other (please specify) | |
| Don't know | |

## Business Activities

14. Can you provide a brief description of the products and/or services offered by your business?

| |
|---|
| |

15. In what locations do you deliver Adventure Tourism activities and services?
*Interviewer to add details, including specific locations, against relevant categories*

| | |
|---|---|
| Locally (please specify area) | |
| Regionally (please specify area e.g. Highlands and Islands, Edinburgh and Lothians) | |
| Scotland wide | |
| Internationally (please specify e.g. Africa, Antarctica, Asia, Australia Europe, North America, South America) | |
| Other (please specify) | |

16. Which of the following types of Adventure Tourism activities are covered / offered by your business? *Interviewer to code to all relevant categories*

| | |
|---|---|
| **Walking/climbing:** mountain walks/ treks, long distance trails, rock climbing and mountaineering | |
| **Cycling/ biking:** cycle touring and mountain biking | |
| **River activities:** canoeing, kayaking, rafting and canyoning | |
| **Marine activities:** sailing, kayaking surfing and diving | |
| **Wildlife/ nature watching:** boat and vehicle excursions and walking | |
| **Snow activities:** skiing, snowboarding, ski-touring, snow-shoeing, ice climbing | |
| **Other** (please specify) | |

17. Would you classify your business as:
    a. an adventure travel tour operator,
    b. an activity and experience provider, or
    c. an activity centre or attraction?

*Interviewer to code to all relevant categories*

| | |
|---|---|
| **Adventure Travel Tour Operators** *[Definition for interviewer: fully fledged tour operators that provide consumers with a package of services including accommodation, transport, guides and equipment as required. These operators may work on a fixed departure group basis and typically operate throughout Scotland, although some specialise in particular regions. They may work directly with the consumer or through intermediaries e.g. travel agents or destination management companies].* | |

| | |
|---|---|
| **Activity and Experience Providers** *[Definition for interviewer: probably represents the largest numbers of businesses and may include, for example, mountain guides, wildlife boat cruises and river rafting operators. These businesses are typically based in one location but may work on a regional/national basis. Activities and experiences offered may last from a couple of hours to several days].* | |
| **Activity Centres and Attractions** *[Definition for interviewer: throughout Scotland, there are many activities centres and attractions provided in a range of adventure and nature bases experiences. Some specialise in training, personal development and professional qualifications, while many focus on the delivery of educational services to local authorities and youth groups. Some of the centres have a leisure and corporate focus, offering a range of on site activities. Many have on-site accommodation in which customers can both dine and stay overnight].* | |

## Business Size

18. How many full time and part time staff do you currently employ?
*Interviewer to complete one answer per row*

| | |
|---|---|
| Total | |
| Full time | |
| Part time | |

19. What was the maximum number of full and part time staff that you employed this summer and that you expect to employ this winter?
*Interviewer to complete matrix*

| | This summer | This winter |
|---|---|---|
| Total | | |
| Full time | | |
| Part time | | |

20. What was your approximate turnover for the most recently completed financial year?

| |
|---|
| |

## Growth Plans

21. Over the next 2-3 years, do you expect your business to grow, contract or remain the same size in terms of employment and turnover?
*Interviewer to select one category per column*

| | Employment | Turnover |
|---|---|---|
| Increase rapidly (over 20%) | | |
| Increase moderately (up to 20%) | | |
| Remain stable | | |

| | | |
|---|---|---|
| Decrease moderately (up to 10%) | | |
| Decrease rapidly (by more than 10%) | | |

## Other Contacts

22. Please can you provide the names (and contact details (name/ telephone/ email) if possible) of other Adventure Tourism businesses which you know of locally or that you collaborate with on a regular basis that should be included in our database?

| Business Name | Contact Name | Telephone | Email |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Future Contact

23. The next stage of the study involved a more detailed survey on growth opportunities, collaborative activities, supply chain linkages and support needs. Would you be happy for us to contact you at a later date to take part?

| | |
|---|---|
| Yes | |
| No | |

**Thank you**

# Appendix C: In-depth Interview Questionnaires

## Activity and Experience Providers and Activity Centres and Attractions Survey

### A Background & Context

1. In what year was your business established?

| |
|---|
| |

2. How many full time and part time staff do you employ?
   *(Interviewer to precode from mapping database)*
   *Note – as per mapping database – peak season is the peak season for the business – e.g. if ski-ing sector business, then peak season is winter and off-season non-winter months etc, and vice versa for more typical businesses where summer is peak season. Question is designed to differentiate between maximum and minimum employment levels in the business.*

| | Peak Season | Off season |
|---|---|---|
| Full Time | | |
| Part Time | | |
| % of workforce who are temporary/seasonal – UK students | | |
| % of workforce who are temporary/seasonal – overseas students | | |
| % of workforce who are temporary/seasonal – other (UK) | | |
| % of workforce who are temporary/seasonal – other overseas | | |
| Total | | |

3. What was your approximate turnover for the most recently completed financial year?
   *(Interviewer to precode from mapping database)*

| |
|---|
| |

4. To what extent has your company grown or contracted in the **last three years** in terms of employment and turnover?

| | Employment | Turnover |
|---|---|---|
| Grown rapidly (more than 20%) | | |
| Grown moderately (less than 20%) | | |
| Remained the same | | |
| Decreased moderately (less than 10%) | | |
| Decreased rapidly (more than 10%) | | |
| Don't know/ prefer not to say | | |

5. What are your company's growth aspirations for the **next three years** in terms of employment and turnover? *(Interviewer to select one answer per column)*

| | Employment | Turnover |
|---|---|---|
| Grow rapidly (more than 20%) | | |
| Grow moderately (less than 20%) | | |
| Remain the same | | |
| Decrease moderately (less than 10%) | | |
| Decrease rapidly (more than 10%) | | |

| | | |
|---|---|---|
| Don't know/ prefer not to say | | |

6. What are your future investment plans for the business?

| |
|---|
| |

7. How well positioned are you to realise these plans?

| | |
|---|---|
| The company will be able to realise these plans on its own | **Go to Q9** |
| The company will be able to realise these plans with additional support | **Go to Q8** |
| I'm unsure if the company will be able to achieve these plans (please specify confidence level that plans will be achieved e.g. 50%) | **Go to Q9** |

8. If additional support, please specify which type(s) of organisation(s) you would like to work with to receive additional support?

| | |
|---|---|
| Public sector, e.g. the local authority, Visit Scotland, Highlands and Islands Enterprise | |
| Private sector organisations e.g. through collaboration with other businesses or consultancy support | |
| Trade bodies | |
| Destination Management Organisations | |
| Other (please specify) | |

## B What your business does

9. What types of Adventure Tourism does your business provide?
*(Interviewer to precode from mapping database)*

| | |
|---|---|
| **Walking:** mountain walks/ treks and long distance trails | |
| **Climbing:** rock climbing and mountaineering | |
| **Cycling/ biking:** cycle touring and mountain biking | |
| **River activities:** canoeing, kayaking, rafting and canyoning | |
| **Marine activities:** sailing, kayaking surfing and diving | |
| **Wildlife/ nature watching:** boat and vehicle excursions and walking | |
| **Snow activities:** skiing, snowboarding, ski-touring, snow-shoeing, ice climbing | |
| **Other** (please specify) | |

10. What are the main products and services you offer?
*(Interviewer to precode from mapping database)*

| | |
|---|---|
| Activity provision | |
| Accommodation | |
| Dining facilities | |
| Transport | |
| Guides | |
| Equipment | |
| Training | |
| Personal development | |
| Professional qualifications | |
| Delivery of education services to local authorities | |
| Delivery of education services to youth groups | |
| Corporate activities | |
| Leisure services | |

| Other(s) (please specify) | |
|---|---|

11. A) Please specify your three most popular activities/ experiences:

1 (most popular)______________________________________________________
2 (second most popular)________________________________________________
3 (third most popular)__________________________________________________

11. B) And how long they last, as well as the typical lengths of **all** your activities/ experiences on average?
*(Interviewer to select one response)*

| | 1-2 hrs | Half day | 1 day | 2 days | 3-4 days | 5 days | 1 week + please specify |
|---|---|---|---|---|---|---|---|
| Most popular | | | | | | | |
| 2nd most popular | | | | | | | |
| 3rd most popular | | | | | | | |
| Average of all activities/experiences | | | | | | | |

12. Does this vary by sector or sub-sector?

| |
|---|
| |

## C When and Where

13. In what area are you based and in which area(s) do you deliver your activities? If multiple locations, please specify. *(Interviewer to precode from mapping database)*

| | Location of business | Area Activities are Delivered |
|---|---|---|
| Argyll and the Islands | | |
| Caithness and Sutherland | | |
| Inner Moray Firth | | |
| Lochaber, Skye and Wester Ross | | |
| Moray | | |
| Orkney | | |
| Outer Hebrides | | |
| Shetland | | |
| Throughout Highlands and Islands | | |
| | | |
| Cairngorms National Park area | | |
| Loch Lomond and the Trossachs National Park area | | |
| | | |
| Aberdeen City and Shire | | |
| Ayrshire | | |
| Dumfries and Galloway | | |
| Edinburgh and the Lothians | | |

| | | |
|---|---|---|
| Glasgow and the Clyde Valley | | |
| Fife | | |
| Forth Valley | | |
| Scottish Borders | | |
| Tayside (Angus, Perth and Dundee) | | |
| | | |
| Throughout Scotland | | |
| Other specific areas (please specify) | | |

14. From your perspective, are there any particular known geographic clusters of activity? (please provide details)

| |
|---|
| |

15. In your opinion, are there any further **potential** geographic clusters of activity? (please provide details)

| |
|---|
| |

## D Seasonality

16. How many days/ months of the year do you operate?

| |
|---|
| |

17. Please explain any trends in seasonality for your business *(interviewer to explore variation by sub sector/activities provided – do they offer different services/products, diversify over the year to keep open longer?)*

| |
|---|
| |

18. If you are not open all year round, please explain your reasons (*select all that apply)*

| | |
|---|---|
| Personal reasons/ lifestyle choice e.g. to spend more time with family | |
| Demand is not there so not profitable | |
| The offer is seasonal (e.g. skiing) | |
| Weather conditions make opening challenging/ not possible | |
| Following industry standards/ expectations | |
| Other (please specify) | |

## E Customers (and Motivations)

19. What is the profile of your customers? *(Interviewer to state approximate number. Where not known, ask for percentage)*

| | | |
|---|---|---|
| **Age (%)** | 0-16 years | |
| | 17-25 years | |
| | 26-45 years | |
| | 46-65 years | |
| | 66 years + | |
| | *Sub Total* | |
| | | |
| **Gender (%)** | Male | |
| | Female | |
| | *Sub Total* | |

| | | |
|---|---|---|
| **Geography (%)** | Local | |
| | Regional | |
| | Rest of Scotland | |
| | UK | |
| | Europe | |
| | North America | |
| | South America | |
| | Africa | |
| | Asia | |
| | Australia | |
| | *Sub Total* | |
| | | |
| **Type of customer** | Local residents (within 5 miles) | |
| | Students/school children | |
| | Corporate/business tourists (corporate team building, away days etc.) | |
| | Tourists (not covered above) | |
| | Other (please specify) | |
| | *Sub Total* | |
| | | |
| **Length of stay *(of the holiday as a whole)*** | Day visits | |
| | Overnight stays | |
| | Long weekends | |
| | 1 week holidays | |
| | 2-3 week holidays | |
| | 3 week + holidays | |
| | Other (please specify) | |
| | *Sub Total* | |

20. Do you think visitors/customers are primarily motivated by the activity, or the location? *(Interviewer to select one response)*

| | |
|---|---|
| The activity | |
| The location | |
| Both activity and location equally | |
| Neither/nor | |
| Unable to say/comment | |

## F Reaching Customers

21. What are your main marketing methods?
(*Interviewer to select all that apply)*

| | |
|---|---|
| Social media – Linked In | |
| Social media – Twitter | |
| Social media – Facebook | |
| Social media – other (please specify) | |
| Website | |
| Flyers | |
| Posters | |

| | |
|---|---|
| Referral networks | |
| Word of mouth | |
| Customer follow-up | |
| Cold calling | |
| Local media (e.g. newspapers, newsletters) | |
| Trade bodies/websites | |
| Other (please specify) | |

22. Do you have a website?
*(Interviewer to precode from mapping database)*

| | |
|---|---|
| Yes | **Go to 23** |
| No | **Go to 26** |

23. How integral/ essential is your website to your business? (please rate on the scale of 0 to 10 where 0 is not at all essential and 10 is absolutely crucial?)

| 0 = not at all | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 = absolutely crucial |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

24. Is your website managed in house or externally?(please tick one)

| | |
|---|---|
| In house | |
| Externally | |

25. How often is your website updated?

| |
|---|
| |

26. Do you have an e-commerce ability? *(Interviewer to precode from mapping database)*

| | |
|---|---|
| Yes | **Go to Q27** |
| No | **Go to Q28** |

27. What proportion of your business is done online?
*(Interviewer to select one response)*

| | |
|---|---|
| 0-10% | |
| 11-20% | |
| 21-30% | |
| 31-40% | |
| 41-50% | |
| 51-60% | |
| 61-70% | |
| 71-80% | |
| 81-90% | |
| 91-100% | |

## G Collaboration

28. To what extent do you collaborate with other tourism businesses?

| 1 – not at all | 2 – to some extent | 3 – to a good extent | 4 – to a large extent | N/A/ Don't know |
|---|---|---|---|---|
| **Go to Q34** | **Go to Q29** | **Go to Q29** | **Go to Q29** | **Go to Q34** |

29. Which types of businesses do you collaborate with?
(*Interviewer to select all that apply)*

| | |
|---|---|
| Other local activity and experience providers | |
| Other activity and experience providers in Scotland | |
| Other activity and experience providers in UK | |
| Other activity and experience providers Internationally | |
| Local Accommodation providers | |
| Other accommodation providers in Scotland | |
| Local tour operators | |
| Tour operators in the rest of Scotland | |
| Tour operators in the UK | |
| Tour operators internationally | |
| Local transport providers | |
| Other (please specify) | |

30. Tell us a little bit more about this collaboration, and its benefits.

| |
|---|
| |

31. What are the methods of collaboration? (*Interviewer to select all that apply)*

| | |
|---|---|
| Joint marketing and promotional materials (written) | |
| Joint marketing via a website | |
| Joint marketing via social media | |
| Packages with other activity and experience providers | |
| Packages with accommodation providers | |
| Packages with tour operators | |
| Discounts/offers | |
| Other (please specify) | |

32. Would you like to collaborate (more) with other tourism businesses and organisations in Scotland? *(Interviewer to select one response)*

| | |
|---|---|
| Yes | **Go to Q33** |
| No | **Go to Q34** |
| Maybe | **Go to Q33** |
| Don't know/ prefer not to say | **Go to Q34** |

33. In what ways would you like to collaborate more?

| |
|---|
| |

***Go to Q35***

34. Do you have reasons for not collaborating/ not wanting to collaborate more with other tourism businesses?
(*Interviewer to select all that apply)*

| | |
|---|---|
| I do not see the point/ value | |
| There aren't any businesses offering complimentary products/ services in close geographical proximity | |
| I do not know of any other high quality businesses | |
| I am not sure how to go about it | |
| Other (please specify) | |

## H Challenges facing Your Business

35. What are the challenges currently facing **your business**?
(*Interviewer to select all that apply)*

| | |
|---|---|
| E-commerce/ digital capability | |
| E-marketing | |
| Increasing/growing sales | |
| Developing/accessing new markets | |
| New service development | |
| Business innovation | |
| Leadership and business management capability | |
| Staff recruitment/retention | |
| Retention of customers | |
| Accessing finance for growth | |
| Transport-related costs (e.g. fuel) | |
| Other (please specify) | |

36. What is the single greatest challenge currently facing your business?

| | |
|---|---|
| Now | In the future |

## I Workforce Issues

37. How easy do you find it to attract skilled employees on a scale of 1-5, where 1 is very difficult and 5 is very easy?

| 1 – very difficult | 2 – difficult | 3 – neither/ nor | 4 – easy | 5 – very easy | N/A/ Don't know |
|---|---|---|---|---|---|
| | | | | | |

38. Please explain your answer.

| |
|---|
| |

39. Are there any specific skills gaps when recruiting employees? (please specify)

| |
|---|
| |

40. How would you rate the level of skills development support / training available within the sector?
(*Interviewer to select one response)*

| | |
|---|---|
| Excellent | |
| Good | |
| Neither good nor poor | |
| Poor | |
| Very poor | |
| Unsure/ not able to comment | |

41. Please explain your answer.

| |
|---|
| |

42. How would you describe your staff turnover rate?
(*Interviewer to select one response)*

| | |
|---|---|
| Low | |
| Medium | |
| High | |

43. Are there any particular reasons for staff turnover, e.g. seasonal staff or if students are used at busier times of year?

| |
|---|
| |

***If turnover low, please go to question 44. Otherwise, please go to question 45.***

44. If turnover rates are low, why do you think this is?
(*Interviewer to select all that apply)*

| | |
|---|---|
| AT is an attractive sector to work in | |
| Company is recognised industry leader | |
| Company offers career progression opportunities | |
| Employee benefits are attractive | |
| We offer all year round employment opportunities | |
| Other (please specify) | |

***Please go to question 46***

45. If turnover rates are higher, why do you think this is?
(*Interviewer to select all that apply)*

| | |
|---|---|
| Lack of adequate skills development/ training available in the industry | |
| Lack of training and development in the company as cost of training is prohibitive | |
| Nature of activities means work is often seasonal | |
| Hard to find suitably skilled staff | |
| Staff only wish to work for a season/on a seasonal basis | |
| Other (please specify) | |

## J Future Investment/Support Requirements

46. What types of support does your business currently receive and what types of support would you benefit from to grow your business?
(*Interviewer to select all that apply)*

| | Currently receive | Would benefit from |
|---|---|---|
| E-commerce/ digital sales | | |
| Web development | | |
| Strategic planning | | |
| Finance for investment | | |
| Workforce development | | |
| Sales/marketing | | |
| Networking opportunities | | |
| Leadership and management | | |
| Staff recruitment/retention | | |
| Innovation/R&D | | |
| Other (please specify) | | |

47. For each of your future support needs is this principally advice, training or finance/investment?

| | Advice | Training | Finance/ investment |
|---|---|---|---|
| E-commerce/ digital sales | | | |
| Web development | | | |
| Strategic planning | | | |
| Finance for investment | | | |
| Workforce development | | | |
| Sales/marketing | | | |
| Networking opportunities | | | |
| Leadership and management | | | |
| Staff recruitment/retention | | | |
| Innovation/R&D | | | |
| Other (please specify) | | | |

## K Assessing Future Demand and Market Opportunities

48. With regard to **future** demand for your provision/activity/experience **in the sector**, in the next 3-5 years do you expect this to?
*(Interviewer to select one response)*

| | |
|---|---|
| Increase significantly – by more than 20% | |
| Increase moderately – by less than 20% | |
| Remain the same | |
| Decline moderately – by less than 10% | |
| Decline significantly – by more than 10% | |

49. Which of the following customer types do you see as future market opportunities in the short (2-3 years), medium (3-5 years) and long term (5 years plus)?
(*Interviewer to select all that apply)*

| | Short | Medium | Long |
|---|---|---|---|
| More overseas visitors (please specify growth markets) | | | |
| More young people | | | |
| More retired people | | | |
| Business tourists | | | |
| Staycations | | | |
| Education-related | | | |
| Culture-related | | | |
| More A, B, C1 class visitors | | | |
| Other (please specify) | | | |

## L Meeting Future Demand (and Challenges)

50. What are the key threats/ challenges **facing your part of the AT sector** in terms of meeting this demand and capitalising on opportunities in the short (2-3 years), medium (3-5 years) and long term (5 years plus)?
(*Interviewer to select all that apply)*

| | Short | Medium | Long |
|---|---|---|---|
| Business finance for investment | | | |
| Lack of good quality/appropriate accommodation offer | | | |
| Lack of internet/broadband coverage | | | |
| Lack of mobile coverage | | | |
| Lack of support for the sector/business | | | |
| Lack of investment/development/growth opportunities | | | |
| Lack of staff development support – access to | | | |
| Lack of staff development support – costs of | | | |
| Lack of customer demand | | | |
| Transport links/costs | | | |
| Other (please specify) | | | |

51. What is the most significant threat/challenge – and what could be done to overcome this?

| |
|---|
| |

## Further Comments

52. Do you have any further comments you would like to add about your business, the Adventure Tourism market in Scotland and/or the support required for business and sector development and growth?

| |
|---|
| |

**Thank you**

## b) Adventure Travel Tour Operators Survey

### A Background Information

1. In what year was your business established?

| |
|---|
| |

2. Where is the principal base of the company?
*(Interviewer to precode from mapping database)*

| |
|---|
| |

3. How many full time and part time staff do you employ?
*(Interviewer to precode from mapping database)*
*Note – as per mapping database - peak season is the peak season for the business – e.g. if ski-ing sector business, then peak season is winter and off-season non-winter months etc, and vice versa for more typical businesses where summer is peak season. Question is designed to differentiate between maximum and minimum employment levels in the business.*

| | Peak Season | Off season |
|---|---|---|
| Full Time | | |
| Part Time | | |
| % of workforce who are temporary/seasonal – UK students | | |
| % of workforce who are temporary/seasonal – overseas students | | |
| % of workforce who are temporary/seasonal – other (UK) | | |
| % of workforce who are temporary/seasonal – other overseas | | |
| Total | | |

4. What was your approximate turnover for the most recently completed financial year?
*(Interviewer to precode from mapping database)*

| |
|---|
| |

5. To what extent has your company grown or contracted in the **last three years** in terms of employment and turnover?
*(Interviewer to select one answer per column)*

| | Employment | Turnover |
|---|---|---|
| Grown rapidly (more than 20%) | | |
| Grown moderately (less than 20%) | | |
| Remained the same | | |
| Decreased moderately (less than 10%) | | |
| Decreased rapidly (more than 10%) | | |
| Don’t know/ prefer not to say | | |

6. What are your company's growth aspirations for the **next three years** in terms of employment and turnover?
*(Interviewer to select one answer per column)*

| | Employment | Turnover |
|---|---|---|
| Grow rapidly (more than 20%) | | |
| Grow moderately (less than 20%) | | |
| Remain the same | | |
| Decrease moderately (less than 10%) | | |
| Decrease rapidly (more than 10%) | | |
| Don't know/ prefer not to say | | |

7. What are your future investment plans for your business/centre/attraction?

| |
|---|
| |

8. How well positioned are you to realise these plans?

| | |
|---|---|
| The company will be able to realise these plans on its own | **Go to Q10** |
| The company will be able to realise these plans with additional support | **Go to Q9** |
| I'm unsure if the company will be able to achieve these plans (please specify confidence level that plans will be achieved e.g. 50%) | **Go to Q10** |

9. If additional support will be required, please specify which type(s) of organisation(s) you would like to work with to receive additional support?

| | |
|---|---|
| Public sector, including your local authority, Visit Scotland, HIE | |
| Private sector organisations e.g. through collaboration with other businesses or consultancy support | |
| Trade bodies | |
| Destination Management Organisations | |
| Other (please specify) | |

## B What your business does – and when and where (nature of provision/ tours)

10. What types of Adventure Tourism do you cater for? *(Interviewer to precode from mapping database)*

| | *Cater for Y/N* |
|---|---|
| **Walking:** mountain walks/ treks and long distance trails | |
| **Climbing:** rock climbing and mountaineering | |
| **Cycling/ biking:** cycle touring and mountain biking | |
| **River activities:** canoeing, kayaking, rafting and canyoning | |
| **Marine activities:** sailing, kayaking surfing and diving | |
| **Wildlife/ nature watching:** boat and vehicle excursions and walking | |
| **Snow activities:** skiing, snowboarding, ski-touring, snow-shoeing, ice climbing | |
| **Other** (please specify) | |
| *Subtotal* | |

11. What are the main services you offer? (please tick all that apply)

| | |
|---|---|
| Activity provision | |
| Accommodation | |
| Transport | |
| Guides | |
| Equipment | |
| Training | |
| Personal development | |
| Professional qualifications | |
| Delivery of education services to local authorities | |
| Delivery of education services to youth groups | |
| Other(s) (please specify) | |

12. A) Please specify your three most popular **tours**:

1 (most popular)_______________________________________________________

2 (second most popular)_________________________________________________

3 (third most popular)___________________________________________________

12. B) And how long the most popular tours last, as well as the typical lengths of your tours on average?

*(Interviewer to select one response)*

| | 1-2 hrs | Half day | 1 day | 2 days | 3-4 days | 5 days | 1 week + please specify |
|---|---|---|---|---|---|---|---|
| Most popular | | | | | | | |
| 2nd most popular | | | | | | | |
| 3rd most popular | | | | | | | |
| Average of all activities/experiences | | | | | | | |

13. Does this vary by sub sector?

| |
|---|
| |

14. Where does your company operate/deliver tours?

*(Interviewer to precode from mapping database)*

| | |
|---|---|
| Parts of Scotland only | |
| Across Scotland only | |
| Across the UK | |
| Across Europe | |
| Globally | |

15. Does your company operate/provide services in the following geographic areas in Scotland?

(*Interviewer to select all that apply)*

| | |
|---|---|
| Argyll and the Islands | |
| Caithness and Sutherland | |
| Inner Moray Firth | |

| | |
|---|---|
| Lochaber, Skye and Wester Ross | |
| Moray | |
| Orkney | |
| Outer Hebrides | |
| Shetland | |
| Throughout Highlands and Islands | |
| | |
| Cairngorms National Park area | |
| Loch Lomond and the Trossachs National Park area | |
| | |
| Aberdeen City and Shire | |
| Ayrshire | |
| Dumfries and Galloway | |
| Edinburgh and the Lothians | |
| Glasgow and the Clyde Valley | |
| Fife | |
| Forth Valley | |
| Scottish Borders | |
| Tayside (Angus, Perth and Dundee) | |
| | |
| Throughout Scotland | |
| Other specific areas (please specify) | |

16. Does this vary by AT sub-sector? If so, please explain variations (e.g. certain sub-sector tours/activities in certain geographic areas)

| |
|---|
| |

17. From your perspective, are there any particular known geographic clusters of activity?

| |
|---|
| |

18. In your opinion, are there any further **potential** geographic clusters of activity?

| |
|---|
| |

19. Which are the principal towns and villages you use when running overnight tours?

| |
|---|
| |

20. Do you work directly with the customer/consumer or through intermediaries? (*Interviewer to select all that apply)*

| | |
|---|---|
| Directly with customers/consumers | **Go to Q22** |
| Through intermediaries | **Go to Q21** |

21. Which intermediary organisations do you work through?

| | |
|---|---|
| Inbound tour operators | |
| Online travel agents | |
| Other travel agents | |
| Other (please specify) | |

22. What are your largest markets in **Scotland** in terms of value?
(*Interviewer to select all that apply)*

| **By sub-sector** | | **By geography** | |
|---|---|---|---|
| Walking | | Argyll and the Islands | |
| Climbing | | Caithness and Sutherland | |
| Cycling/ biking | | Inner Moray Firth | |
| River activities | | Lochaber, Skye and Wester Ross | |
| Marine activities | | Moray | |
| Wildlife/ nature watching | | Orkney | |
| Snow activities | | Outer Hebrides | |
| Other (please specify) | | Shetland | |
| | | Throughout Highlands and Islands | |
| | | Cairngorms National Park area | |
| | | Loch Lomond & Trossachs National Park | |
| | | Aberdeen City and Shire | |
| | | Ayrshire | |
| | | Dumfries and Galloway | |
| | | Edinburgh and the Lothians | |
| | | Glasgow and the Clyde Valley | |
| | | Fife | |
| | | Forth Valley | |
| | | Scottish Borders | |
| | | Tayside (Angus, Perth and Dundee) | |

## C Seasonality

23. How many days/ months of the year do you provide tours? *(please specify)*

| |
|---|
| |

24. Please explain any trends in seasonality for your business *(interviewer to explore variation by sub sector/activities provided – do they offer different services/products, diversify over the year to keep open longer?)*

| |
|---|
| |

25. If you do not provide tours all year round, please explain the reason(s)?
(*Interviewer to select all that apply)*

| | |
|---|---|
| Demand is not there so not profitable | |
| The offer is seasonal (e.g. skiing) | |
| Weather conditions make opening challenging/ not possible | |
| Following industry standards/ expectations | |
| Personal reasons/ lifestyle choice | |
| Other (please specify) | |

## D Customers and Motivations

26. What is the profile of your customers for tours/services in Scotland? *(interviewer to state approximate number. Where not known, ask for percentage)*

| | | |
|---|---|---|
| **Age (%)** | 0-16 years | |
| | 17-25 years | |
| | 26-45 years | |
| | 46-65 years | |
| | 66 years + | |
| | *Sub Total* | |
| | | |
| **Gender (%)** | Male | |
| | Female | |
| | *Sub Total* | |
| | | |
| **Geography (%)** | Scotland | |
| | Rest of UK | |
| | Europe | |
| | North America | |
| | South America | |
| | Africa | |
| | Asia | |
| | Australia | |
| | *Sub Total* | |
| | | |
| **Type of customer** | Local residents | |
| | Students/school children | |
| | Corporate/business tourists (corporate team building, away days etc.) | |
| | Tourists (not covered above) | |
| | Other (please specify) | |
| | *Sub Total* | |
| | | |
| **Length of stay *(of the holiday as a whole)*** | Day visits | |
| | Overnight stays | |
| | Long weekends | |
| | 1 week holidays | |
| | 2-3 week holidays | |
| | 3 week + holidays | |
| | Other (please specify) | |
| | *Sub Total* | |

27. Do you think visitors/ customers are primarily motivated by the activity, or the location?
*(Interviewer to select one response)*

| | |
|---|---|
| The activity | |
| The location | |
| Both activity and location equally | |

| | |
|---|---|
| Neither/nor | |
| Unable to say/comment | |

## E Reaching Customers

28. What are your main marketing methods? (*Interviewer to select all that apply)*

| | |
|---|---|
| Social media – Linked In | |
| Social media – Twitter | |
| Social media – Facebook | |
| Social media – other (please specify) | |
| Website | |
| Flyers | |
| Posters | |
| Referral networks | |
| Word of mouth | |
| Customer follow-up | |
| Cold calling | |
| Local media (e.g. newspapers, newsletters) | |
| Trade bodies/websites | |
| Other (please specify) | |

29. Do you have a website?

*(Interviewer to precode from mapping database)*

| | |
|---|---|
| Yes | **Go to 30** |
| No | **Go to 33** |

30. How integral/ essential is your website to your business? (please rate on the scale of 0 to 10 where 0 is not at all essential and 10 is absolutely crucial?

| 0 = not at all | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 = absolutely crucial |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | |

31. Is your website managed in house or externally?(please tick one)

| | |
|---|---|
| In house | |
| Externally | |

32. How often is your website updated? (please specify e.g. in real time, every week, fortnightly, monthly etc.)

| |
|---|
| |

33. Do you have an e-commerce capability?

| | |
|---|---|
| Yes | **Go to Q34** |
| No | **Go to Q35** |

34. What proportion of your business is done online?
*(Interviewer to select one response)*

| | |
|---|---|
| 0-10% | |
| 11-20% | |
| 21-30% | |
| 31-40% | |
| 41-50% | |
| 51-60% | |
| 61-70% | |
| 71-80% | |
| 81-90% | |
| 91-100% | |

## F Collaborative Activity and the Supply Chain

35. Which types of businesses and organisations do you collaborate with?
(*Interviewer to select all that apply)*

| | |
|---|---|
| With other tour operators in Scotland | **Go to Q36** |
| With other tour operators in the UK | **Go to Q36** |
| With other tour operators internationally | **Go to Q36** |
| With accommodation providers | **Go to Q36** |
| With activity providers | **Go to Q36** |
| With transport/travel companies | **Go to Q36** |
| With equipment providers | **Go to Q36** |
| None of the above | **Go to Q38** |
| Other (please specify) | **Go to Q36** |

36. Please tell us a bit more about this collaborative activity?

| |
|---|
| |

37. How do you decide which companies to collaborate with?

| |
|---|
| |

***Please go to question 39***

38. If not, what are the reasons for non-collaboration?
(*Interviewer to select all that apply)*

| | |
|---|---|
| We do not see the value in collaboration | |
| We do not need to collaborate | |
| Lack of good quality collaborators – other tours operators | |
| – accommodation providers | |
| – activity providers | |
| – transport/travel providers | |
| Lack of available collaborators – other tours operators | |
| – accommodation providers | |

| | |
|---|---|
| – activity providers | |
| – transport/travel providers | |
| Do not know how to go about collaborating with other businesses | |
| Lack of time to source collaborators | |
| Other (please specify) | |

39. Do you collaborate with public sector agencies and tourism co-operatives?
(*Interviewer to select all that apply)*

| | Yes regularly | Yes occasionally | No |
|---|---|---|---|
| With tourism associations – either destination or sectoral | | | |
| With Visit Scotland | | | |
| With Scottish Enterprise | | | |
| With Highlands and Islands Enterprise | | | |
| With the local authority/local authorities | | | |
| Other (please specify) | | | |

40. Tell us a little bit more about this collaboration, and its benefits

| |
|---|
| |

41. Would you like to collaborate more with other tourism businesses and organisations, including the public sector, in Scotland?
*(Interviewer to select one response)*

| | |
|---|---|
| Yes | **Go to Q42** |
| No | **Go to Q44** |
| Not sure | **Go to Q44** |

42. If yes, what are the barriers to greater collaboration..?
(*Interviewer to select all that apply)*

| | |
|---|---|
| Lack of good quality collaborators – other tours operators | |
| – accommodation providers | |
| – activity providers | |
| – transport/travel providers | |
| Lack of available collaborators – other tours operators | |
| – accommodation providers | |
| – activity providers | |
| – transport/travel providers | |
| Do not know how to go about collaborating with other businesses | |
| Lack of time to source collaborators | |
| No barriers – we are actively seeking to work with collaborators | |
| Other (please specify) | |

43. What types of organisations/ businesses would you like to collaborate with more? (please tick all that apply)

| | |
|---|---|
| With tourism associations – either destination or sectoral | |
| With Visit Scotland | |
| With Scottish Enterprise | |
| With Highlands and Islands Enterprise | |
| With the local authority/local authorities | |
| With other tourism businesses | |
| Other (please specify) | |

## G Challenges facing your Business

44. What are the challenges currently facing your particular business? (*Interviewer to select all that apply)*

| | |
|---|---|
| E-marketing | |
| Increasing/growing sales | |
| Developing/accessing new markets | |
| New service development | |
| Business innovation | |
| Leadership and business management capability | |
| Staff recruitment/retention | |
| Retention of customers | |
| Accessing finance for growth | |
| Transport-related costs (e.g. fuel) | |
| Other (please specify) | |

45. What is the single greatest challenge currently facing your business?

| Now | Future |
|---|---|

## H Workforce Issues

46. How easy do you find it to attract skilled employees on a scale of 1-5, where 1 is very difficult and 5 is very easy?

| 1 – very difficult | 2 – difficult | 3 – neither/ nor | 4 – easy | 5 – very easy | N/A/ Don't know |
|---|---|---|---|---|---|
| | | | | | |

47. Please explain your answer.

| |
|---|
| |

48. Are there any specific skills gaps when recruiting employees? (please specify)

| |
|---|
| |

49. How would you rate the level of skills development support / training available within the sector?
(*Interviewer to select one response)*

| | |
|---|---|
| Excellent | |
| Good | |
| Neither good nor poor | |
| Poor | |
| Very poor | |
| Unsure/ unable to comment | |

50. Please explain your answer.

| |
|---|
| |

51. How would you describe your staff turnover rate?
(*Interviewer to select one response)*

| | |
|---|---|
| Low | |
| Medium | |
| High | |

52. Are there any particular reasons for staff turnover, e.g. seasonal staff or if students are used at busier times of year?

| |
|---|
| |

***If turnover low, please go to question 53. Otherwise, please go to question 54.***

53. If turnover rates are low, why do you think this is?
(*Interviewer to select all that apply)*

| | |
|---|---|
| AT is an attractive sector to work in | |
| Company is recognised industry leader | |
| Company offers career progression opportunities | |
| Employee benefits are attractive | |
| We offer all year round employment opportunities | |
| Other (please specify) | |

***Please go to Q55***

54. If turnover rates are higher, why do you think this is?
(*Interviewer to select all that apply)*

| | |
|---|---|
| Lack of adequate skills development/ training available in the industry | |
| Lack of training and development in the company as cost of training is prohibitive | |
| Nature of activities means work is often seasonal | |
| Hard to find suitably skilled staff | |
| Staff only wish to work for a season/on a seasonal basis | |
| Other (please specify) | |

## I The Market and Assessing Future Demand

55. With regard to **future** demand **in the sector**, in the next few years do you expect this to?

| | Increase significantly (more than 20%) | Increase moderately (less than 20%) | Remain the same | Decline moderately (less than 10%) | Decline significantly (more than 10%) | Don't know/cant comment |
|---|---|---|---|---|---|---|
| Walking | | | | | | |
| Climbing | | | | | | |
| Cycling/ biking | | | | | | |
| River activities | | | | | | |
| Marine activities | | | | | | |
| Wildlife/nature watching | | | | | | |
| Snow activities | | | | | | |
| Other (please specify) | | | | | | |

56. Which of the following customer types do you see as future market opportunities in the short (2-3 years), medium (3-5 years) and long term (5 years plus)?

(*Interviewer to select all that apply)*

| | Short | Medium | Long |
|---|---|---|---|
| More overseas visitors (please specify growth markets) | | | |
| More young people | | | |
| More retired people | | | |
| Business tourists | | | |
| Staycations | | | |
| Education-related | | | |
| Culture-related | | | |
| More A, B, C1 class visitors | | | |
| Other (please specify) | | | |

57. What are the top 3 most popular services or products **in the sector** now, and what are expected to be the growth services or products in the future?

| **Most popular now** | **Growth services/products In the future** |
|---|---|
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |

58. What do you consider to be Scotland's strengths and weaknesses in the sector?

| **Strengths** | **Weaknesses** |
|---|---|
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |

## J Meeting future Demand

59. What are the key threats/ challenges **facing your part of the AT sector** in terms of meeting this demand and capitalising on opportunities in the short (2-3 years), medium (3-5 years) and long term (5 years plus)?
    (*Interviewer to select all that apply)*

| | Short | Medium | Long |
|---|---|---|---|
| Business finance for investment | | | |
| Lack of good quality/appropriate accommodation offer | | | |
| Lack of internet/broadband coverage | | | |
| Lack of mobile coverage | | | |
| Lack of support for the sector/business | | | |
| Lack of investment/development/growth opportunities | | | |
| Lack of staff development support – access to | | | |
| Lack of staff development support – costs of | | | |
| Lack of customer demand | | | |
| Transport links/costs | | | |
| Other (please specify) | | | |

60. What is the most significant threat/challenge – and what could be done to overcome this?

| |
|---|
| |

## K Future Support Requirements

61. What types of support (if any) does your business currently receive and what types of support would you benefit from to grow your business?
    (*Interviewer to select all that apply)*

| | Currently receive | Would benefit from |
|---|---|---|
| E-commerce/ digital sales | | |
| Web development | | |
| Strategic planning | | |
| Finance for investment | | |
| Workforce development | | |
| Sales/marketing | | |
| Networking opportunities | | |
| Leadership and management | | |
| Staff recruitment/retention | | |
| Innovation/R&D | | |
| Other (please specify) | | |

62. For each of your future support needs is this principally advice, training or finance/investment? (please tick one per row, depending on the support you currently receive/ would benefit from)

| | Advice | Training | Finance/ investment |
|---|---|---|---|

| | | | |
|---|---|---|---|
| E-commerce/ digital sales | | | |
| Web development | | | |
| Strategic planning | | | |
| Finance for investment | | | |
| Workforce development | | | |
| Sales/marketing | | | |
| Networking opportunities | | | |
| Leadership and management | | | |
| Staff recruitment/retention | | | |
| Innovation/R&D | | | |
| Other (please specify) | | | |

## L Further Comments

63. Do you have any further comments you would like to add about your business, the Adventure Tourism market in Scotland and the support required for business and sector development and growth?

| |
|---|
| |

**Thank you**

## Appendix D: Accommodation, Eating Establishments and Operator Provision per Destinations

| Table A: Accommodation and Operator Provision per Destination | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Fort William | Aviemore | Oban | Isle of Skye | Peebles | Queenstown | Whistler | Ambleside | Betws-y-Coed |
| **Number of commercialized outdoor operators** | 26 | 15 | 20 | 29 | 5 | 100+ | 43 | 22 | 15 |
| **Provision of accommodation on booking.com within 10km** | 61 | 41 | 81 | 123 | 14 | 140 | 120 | 65 | 52 |
| **Provision of accommodation on Trip Advisor within 10km** | 219 | 205 | 180 | 498 | 46 | 203 | 1,140 | 202 | 129 |

**Table B: Eating Establishment Types per Destination**

| | | Fort William | Aviemore | Oban | Isle of Skye | Peebles | Queenstown | Whistler | Ambleside | Betws-y-Coed |
|---|---|---|---|---|---|---|---|---|---|---|
| **No of Michelin starred restaurants** | | **1** | **0** | **0** | **2** | **0** | **1** | **0** | **1** | **0** |
| **No of restaurants in categories** | **British** | 20 | 21 | 22 | 50 | 14 | 3 | | 41 | 11 |
| | **Indian** | 4 | 3 | 4 | 3 | | 7 | 2 | 2 | |
| | **Irish** | | | | | | 2 | 1 | | |
| | **Italian** | | 3 | 2 | | 1 | 7 | 7 | 3 | |
| | **American** | | 2 | | 1 | | 7 | 15 | 1 | |
| | **Pizza** | 1 | 3 | 2 | 1 | | 6 | 12 | 4 | 1 |
| | **Seafood** | 5 | 3 | 16 | 13 | | 8 | 7 | | 2 |
| | **Global/ International** | 1 | 4 | 2 | 2 | 1 | 30 | 30 | | |
| | **Soups** | 1 | 1 | 2 | | | | 2 | 2 | |
| | **Steakhouse** | | 1 | 1 | 1 | 1 | 5 | 6 | 1 | |
| | **Vegetarian** | | 1 | 1 | | | 4 | 6 | 4 | |
| | **Continental** | | 1 | 1 | | | | 2 | 1 | |
| | **Spanish** | | | 1 | 1 | | 5 | 3 | 2 | |
| | **French** | | 1 | 2 | | 2 | 3 | 6 | 5 | 5 |
| | **Middle Eastern** | | | 1 | | | 1 | | | |
| | **Pub** | 1 | 3 | 1 | 1 | 1 | 9 | 19 | 2 | 6 |
| | **Mediterranean** | | | 1 | | | 1 | 2 | 3 | |
| | **Dessert** | | | 2 | | | 6 | 5 | | 2 |
| | **Mexican/Southwestern** | | 1 | | | | 8 | 5 | | |
| | **Japanese** | | | 2 | | | 6 | 5 | | |
| | **European** | 3 | | 1 | 4 | 1 | 13 | 4 | 1 | |
| | **Thai** | 2 | | | | | 7 | 1 | 2 | |
| | **Chinese** | 3 | 1 | 4 | 1 | 2 | 8 | 2 | 3 | 1 |
| | **Vietnamese** | | | | | | 1 | | | |
| | **Caribbean** | | | | | | 1 | | | |
| | **Café** | | | | 11 | 5 | 19 | 16 | 10 | 9 |
| | **Asian** | | | 1 | | 1 | 11 | 4 | 2 | |
| | **Fusion** | 1 | | | 5 | 2 | | | 1 | |
| | **Greek** | | | 1 | | | | 2 | | |

# Appendix E: Country Indicators

## *British Columbia*

**Framework/programme for personnel qualifications:**

Soft skills

http://internationalwildernessguide.com/about/

Hard skills

- Survival courses adventures http://adventures.com/Categories/Category/2/Survival-Courses
- Heli Canada Adventure - Mountaineering Courses http://helicanada.com/courses/mountaineering.html
- Coast Mountain Expeditions - Kayaking Skills Instruction http://www.coastmountainexpeditions.com/?q=node/30

Academic

- Thompson Rivers University - Adventure Sport Certificate http://www.keilir.net/health/health-academy/programs-and-courses/adventure-sport-certificate. The practice part of this course takes part in Iceland.
- North Island College - Adventure Guiding Certificate http://www.nic.bc.ca/program/adventure_guiding_certificate
- Westcoast Adventure College http://www.westcoastadventurecollege.com/information/
- Brooks Outdoor Adventure Tourism Training Program http://www.ctc.sd47.bc.ca/adventure.html
- University of the Fraser Valley - Adventure Tourism Training http://www.educations.com/Adventure_Tourism_Training_78083.htm

**Ease of access**

International airports:

1) Kelowna International Airport
2) International Vancouver Airport
3) Victoria International Airport
4) Abbotsford International Airport

International destinations flown to directly

22

Transport links internally – length of road network/length of rail network

Roads: 23,710 *km*

Rail: 2315km

**Brand effectiveness**

Super, Natural British Columbia

**Is there a national tourism policy/strategy – with explicit support for adventure?**

http://www.jtst.gov.bc.ca/tourismstrategy/documents/MJTI_TourismStrategyReport_FNL.pdf

**Safety framework in place**

- United States Tour Operators Association - http://www.destinationbc.ca/Events/Conference-AGM/United-States-Tour-Operators-Association-%28USTOA%29-A.aspx
- British Columbia River Outfitters Association - http://www.bcroa.com/
- Risk Management for outdoor programs - http://www.embc.gov.bc.ca/em/hazard_preparedness/Handbook_for_Administrators_and_Instructors_PDF_Nov_04_with_cover.pdf

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Population density per square km**

3.7 people per square kilometre.

## *Iceland*

**Framework/programme for personnel qualifications:**

Soft skills

No

Hard skills

- Icelandic Mountain Guides http://www.mountainguides.is/about-us/icelandic-mountain-guides-staff-training/
- Dive.is – Survive Iceland tour http://www.dive.is/diving-snorkeling-tours/other-day-tours/survive-iceland/

Academic

- Thompson Rivers University - Adventure Sport Certificate http://www.keilir.net/health/health-academy/programs-and-courses/adventure-sport-certificate . This certificate course is in the British Columbia but the practice part takes part in Iceland.
- Nordic Adventure Travel - Iceland Tourist Guide School http://www.nat.is/Guides/leidsoguskolinn.htm

**Ease of access**

International airports:

1) Keflavik International Airport
2) Reykjavik International Airport
3) Akureyri International Airport
4) Egilsstadir International Airport

International destinations flown to directly

19

Transport links internally – length of road network/length of rail network

Roads: 13,034km

Rail: Doesn't have a train line

**Brand effectiveness**

Inspired by Iceland

**Is there a national tourism policy/strategy – with explicit support for adventure?**

http://www.scribd.com/doc/2066152/Tourism-Strategy-Iceland-2006-2015#scribd5-

**Safety framework in place**

Icelandic Tourist Board - http://www.ferdamalastofa.is/en/licences-legislation/tour-operator

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Population density per square km**

3 people per square kilometre.

## *Wales*

**Framework/programme for personnel qualifications:**

Soft skills

No

Hard skills

- Plas y Brenin – The National Mountain Sports Centre http://www.pyb.co.uk/
- Forest Freeride - Bike skills coaching http://www.forestfreeride.co.uk/
- Snowdonia adventures http://www.snowdonia-adventures.co.uk/index.html

Academic

- Bangor University
  http://www.bangor.ac.uk/sport
  BSc (Hons) Sport Science (Outdoor Activities)
- University of Wales Trinity St. David
  http://www.trinitysaintdavid.ac.uk
  BA Outdoor Education
  Postgraduate Certificate in Outdoor Education
  Postgraduate Diploma in Outdoor Education
  M.A. in Outdoor Education

**Ease of access**

International airports:

Cardiff Airport

International destinations flown to directly

20+

Transport links internally – length of road network/length of rail network

Roads: 34,459 *km*

Rail: 1691 *km*

**Brand effectiveness**

Have you packed for Wales?

**Is there a national tourism policy/strategy – with explicit support for adventure?**

- http://wales.gov.uk/topics/tourism/developmentl1/activitytourism/ats/?lang=en
- http://wales.gov.uk/docs/drah/publications/Tourism/120403mbcriteriaen.pdf
- http://www.snowdonia-active.com/upload/documents/North%20Wales%20Outdoor%20Sector%20Report%201-2.pdf
- http://www.tourisminsights.info/ONLINEPUB/SPORT%20AND%20EVENTS/SAET%20PDFS/ADVENTURE%20TOURISM%20STRATEGY.pdf
- http://wales.gov.uk/docs/drah/publications/Tourism/130613partnershipforgrowthen.pdf

**Safety framework in place**

Adventure Activities Licensing Service (AALS) - http://wales.gov.uk/topics/tourism/gradingl1/schemes/vwrecognition/?lang=en

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Population density per square km**

148.3 people per square kilometre.

## Norway

**Framework/programme for personnel qualifications:**

Soft skills

No

Hard skills

- Alpine Skills International http://alpineskills.com/grand_norway.html
- Njord http://www.njord.as/courses
- Moran Mountain http://www.moran-mountain.co.uk/moran-mountaineering/ice-climbing-courses.htm

Academic

- The Artic University of Norway - Arctic Adventure Tourism one year programme http://uit.no/studietilbud/program?p_document_id=360173
- The Artic University of Norway - Arctic Adventure Tourism bachelor http://uit.no/studietilbud/program?p_document_id=360168

**Ease of access**

International airports:

1) Bergen Airport, Flesland
2) Haugesund Airport
3) Moss Rygge Airport
4) Oslo (Gardermoen) Airport
5) Torp Sandefjord Airport
6) Tromso Airport
7) Vigra Airport
8) Kristiansund Airport
9) Stavanger Airport
10) Trondheim Airport

International destinations flown to directly

39

Transport links internally – length of road network/length of rail network

Road: 93.000 km

Rail: 4,087 km

**Brand effectiveness**

Norway Powered by Nature

**Is there a national tourism policy/strategy – with explicit support for adventure?**

http://visitnorway.org/wp-content/uploads/2013/03/Brand_Platform_Norway_tourist_destination.pdf

**Safety framework in place**

No

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Population density per square km**

14 people per square kilometre.

## *New Zealand*

**Framework/programme for personnel qualifications:**

Soft skills

No

Hard skills

- http://www.worldexpeditions.com/au/index.php?section=countries&id=118
    1. Alpine Climbing Course
    2. Ice Climbing Course
    3. Mount Aspiring Climb
    4. Mount Cook Aoraki Ascent
- Southern Outdoor Instruction http://www.southernoutdoorinstruction.com/
- Climbing Instruction http://www.climb.co.nz/Adventure/Climbing-Instruction.htm

Academic

Certificates & Diplomas (1 - 3 years fulltime, NZQA Level 3-6):

- Tai Poutini Polytechnic; Greymouth & Wanaka - Cert or Diploma in Eco-Tourism; Cert in Ski Patrol; Cert in Outdoor Recreation; Advanced Cert in Leadership and Guiding.
- Otago Polytechnic School of Adventure; Dunedin & Wanaka - Diploma Outdoor Leadership and Management; Snowboard Instructor; Ski Instructor; Avalanche Safety; NZ Adventure GAP year.
- Christchurch Polytechnic Institute of Technology (CPIT); Christchurch - Diploma in Adventure Instructing and Guiding; Diploma in Recreation Leadership; Certificate in Recreation; Cert in Ski & Snowboard Instruction.
- Sir Edmund Hillary Outdoor Pursuits Centre; Tongariro & Great Barrier Island - Certificate in Outdoor Recreation; Assistant Leadership (1 yr); Leadership (2nd year)
- Auckland University of Technology (AUT); Auckland - Diploma in Adventure Tourism Leadership;
- Nelson Marlborough Institute of Technology (NMIT); Nelson & Blenheim - Diploma in Adventure Tourism Leadership; Cert in Outdoor Recreation
- Waikato Institute of Technology; Hamilton - Diploma in Sport and Recreation (Recreation Management)
- Southern Institute of Technology; Invercargill & Southland (Note: Zero fees!) - Diploma in Sport and Recreation;
- Bay of Plenty Polytechnic; Tauranga - National Certificate in Outdoor Recreation (Assistant Leadership)
- Whitireia Community Polytechnic; Porirua - Diploma in Outdoor Adventure; Cert. in Outdoor Adventure; Cert. in Outdoor Cultural Tourism.
- Waiariki Institute of Technology; Rotorua - Cert. in Adventure Tourism,

Degrees (3 years full time, NZQA Level 7):

- Lincoln University , Canterbury - Bachelor of Recreation Management (Outdoor Leadership)
- Auckland University of Technology (AUT) - Bachelor of Sport and Recreation – Outdoor Education
- Waikato University ; Hamilton - Bachelor of Sport and Leisure Studies
- Christchurch Polytechnic Institute of Technology (CPIT); Christchurch - Bachelor of Adventure Recreation and Outdoor Education2

**Ease of access**

International airports:

1) Auckland Airport
2) Hamilton Airport
3) Rotorua Airport
4) Wellington Airport
5) Christchurch Airport
6) Dunedin Airport

Queenstown Airport

International destinations flown to directly

32

Transport links internally – length of road network/length of rail network

Roads: 93,758km

Rail: 4,154km

**Brand effectiveness**

100% Pure New Zealand

**Is there a national tourism policy/strategy – with explicit support for adventure?**

http://www.tourism2025.org.nz/

http://www.sportnz.org.nz/assets/Uploads/attachments/About-us/Outdoor-Recreation-Strategy-2009-15.pdf

**Safety framework in place**

Outdoors mark - http://www.outdoorsnz.org.nz/

Support Adventure - http://www.supportadventure.co.nz/

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Population density per square km**

17 people per square kilometre

## *England*

**Framework/programme for personnel qualifications:**

Soft skills

No

Hard skills

- Mere Mountains Activities: rocks, water, gorge, trees, hills, underground.
- First aid courses:
  1. Qualifications and CPD with Mere Mountains / JEM Training - First Care Sport and Activity Leader (8hr) (L2 on the IOL OFA framework)
  2. First Care plus for Outdoor Environments (16hr) and for Remote Outdoor Environments (16hr level 4 for experienced first aiders)
  3. First Aid at Work (HSE approved provider) 6hr EFAW 18hr FAW plus AED FAW requalification and annual refreshers

Academic

- Bicton College
  http://www.bicton.ac.uk
  Outdoor Leisure Management
  Adventurous Activity Leadership NVQ Level 2
  Diploma in Outdoor Recreation (City & Guilds Progression Award)
  National Diploma in Outdoor Leisure
  Higher National Certificate (HNC) Countryside Recreation Management
- Birmingham College of Food, Tourism and Creative Studies
  http://www.bcftcs.ac.uk
  BA (Hons) Adventure Tourism
  HND Adventure Tourism Management
- Craven College
  (Aireville Campus, Skipton)
  http://www.craven-college.ac.uk
  Foundation Degree in Outdoor Activities
  BTEC National Diploma in Sport Outdoor Adventure Pathway
- Herefordshire and Ludlow College
  http://www.hlcollege.ac.uk
  BSc Honours Degree in Outdoor Adventure Leadership and Management
  Level 3 Extended Diploma in Sport - Outdoor Adventure
- Liverpool Hope University
  BA Outdoor Recreation Management
  http://www.hope.ac.uk/
- Liverpool John Moores University
  MA Outdoor and Environmental Education Management Development
  http://www.ljmu.ac.uk

BA Hons in Adventure Tourism
http://www.livjm.ac.uk

- Manchester Metropolitan University
  BA/BSc joint honours with Outdoor Studies
  http://www.mmu.ac.uk
- Lumpton College
  http://www.plumpton.ac.uk/
  Outdoor Adventurous Activities (in partnership with Brighton University)
  First Certificate Sport (Outdoor Education) for 14-16 year olds day release from school over two years.
  BTEC First Diploma Sport (Outdoor Education) for one year.
  BTEC National Diploma Sport (Outdoor Education) for two years.
- Reaseheath College, Nantwich
  http://www.reaseheath.ac.uk
  Foundation in Adventure Sports
  First Diploma in Adventure Sports
  National Diploma in Adventure Sports
  Foundation Degree in Adventure Sports Management
- Reigate College
  NVQ Level 3 in Outdoor Education, Development Training and Recreation
- Sheffield Hallam University
  http://www.shu.ac.uk
  MSc/Postgraduate Diploma/Postgraduate Certificate in Outdoor Management Development.
- South Devon College, Torquay
  http://www.southdevon.ac.uk
  Activity Leadership
  Qualification: NVQ Level 2 (National Vocational Qualification)
- University College Chichester
  http://www.chiuni.ac.uk/aded/Courses.cfm
  BA Hons in Adventure Education
- University of Cumbria
  http://www.cumbria.ac.uk/outdoorstudies
  FdA Outdoor Education
  BA (Hons) Outdoor Education Top-up
  BA (Hons) Joint Honours Outdoor Leadership
  BA (Hons) Outdoor Professional Practice Top-up
  BSc (Hons) Outdoor Studies (Environment) & BA (Hons) Outdoor Studies
  Pg Cert Greening Outdoor Practice
  PgDip Outdoor and Experiential Learning - with European option / without

MA Outdoor and Experiential Learning - with European option / without
PgDip Development Training
MA Development Training

- University of Leeds
  http://www.leeds.ac.uk
  B.Sc. Sports Science (Outdoor Activities)
- University of Plymouth
  http://home.plymouth.ac.uk
  FdA Adventure Education Management
  FdA Adventure Education Management (Countryside)
- University of Worcester
  http://www.worcester.ac.uk
  BSc (Honours) in Outdoor Adventure Leadership and Management
  Masters (MSc) in Outdoor Education (part-time or full-time)
- University of Leeds, School of Education
  http://www.leeds.ac.uk
  One year post graduate teaching qualification

**Ease of access**

International airports:

1) Alderney Airport (ACI)
2) Birmingham Airport (BHX)
3) Bournemouth Airport (BOH)
4) Bristol Airport (BRS)
5) Cambridge Airport (CBG)
6) Durham Tees Valley (Teeside) Airport (MME)
7) East Midlands Airport (EMA)
8) Exeter Airport (EXT)
9) Guernsey Airport (GCI)
10) Humberside Airport (HUY)
11) Isle of Man (Ronaldsway) Airport (IOM)
12) Jersey Airport (JER)
13) Leeds-Bradford Airport (LBA)
14) Liverpool (John Lennon) Airport (LPL)
15) London City Airport (LCY)
16) London Gatwick Airport (LGW)
17) London Heathrow Airport (LHR)
18) London Luton Airport (LTN)
19) London Oxford Airport (OXF)
20) London Southend Airport (SEN)
21) London Stansted Airport (STN)

22) Lydd Airport (LYX)
23) Manchester Airport (MAN)
24) Newcastle Airport (NCL)
25) Newquay Airport (NQY)
26) Norwich Airport (NWI)
27) Robin Hood (Doncaster-Sheffield) Airport (DSA)
28) Southampton Airport (SOU)

International destinations flown to directly

80+

Transport links internally – length of road network/length of rail network

Roads: 302.073km

Rail: 11599km

**Brand effectiveness**

N/A

**Level of government policy/strategy support**

- http://www.visitengland.org/Images/Strategic%20Framework%20main%20document_tcm30-33240.pdf
- http://www.englandtourismframework.co.uk/Images/Marketing%20plan%20VE%20FINAL%20FRAMEWORK%20VERSION_1_edited_17_6_11_tcm31-26750.pdf

**Safety framework in place**

Adventure Activities Licensing Authority

Adventuremark - http://www.adventuremark.co.uk/

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Is there a national tourism policy/strategy – with explicit support for adventure?**

None found.

**Population density per square km**

413 people per square kilometre.

## *Chile*

**Framework/programme for personnel qualifications:**

Soft skills

No

Hard skills

- Skiing - http://www.chile-travel.com/chileabout/index.html
- Climbing – http://www.chile-travel.com/solnieve.htm

Academic

- Turismo m. Turismo Aventura - Universidad Tecnológica De Chile Inacap

**Ease of access**

International airports:

1) Comodoro Arturo Merino Benítez International Airport
2) Diego Aracena International Airport
3) Cerro Moreno International Airport
4) Chacalluta International Airport
5) Mataveri International Airport
6) Presidente Carlos Ibáñez del Campo International Airport
7) Carriel Sur International Airport

International destinations flown to directly

17

Transport links internally – length of road network/length of rail network

Roads: 77,603km

Rail: 5,529km

**Brand effectiveness**

Chile: All ways surprising

**Marketing**

National information provision

Website: Yes

App: Yes

E-guides: Yes

**Safety framework in place**

No

**Is there a national tourism policy/strategy – with explicit support for adventure?**

http://www.sernatur.cl/wp-content/plugins/download-monitor/download.php?id=ENT.pdf

**Population density per square km**

24 people per square kilometre.

# Appendix F: Benchmarking Destination Indicators

| Indicator | Queens-town | Whistler | Ambleside | Betws-y-coed | Fort William | Aviemore | Oban | Isle of Skye | Peebles |
|---|---|---|---|---|---|---|---|---|---|
| **Number of international airports within 150km** | 1 | 1 | 5 | 2 | 1 | 2 | 1 | 0 | 3 |
| **Number of coach routes to/from destination** | 4 | 1 | Over 5 | 9 | 5 | 3 | 6 | 4 | 3 |
| **Rail connections** | 0 | 1 | 0 | 1 | 2 | 2 | 2 | 2 | 0 |
| **On national cycle network or have cycle network** | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| **DMO web site/app** | Yes/Yes | Yes/Yes | Yes/No | Yes/No | Yes/No | Yes/No | Yes/No | Yes/No | No/No |
| **Online booking facilities via DMO for activities and accommodation** | Yes | Yes | No | No | No | No | No | No | No |
| **Local-regional brand** | Pure Inspiration | No | No | No | The Outdoor Capital of the UK | No | Seafood Capital of Scotland | Live, love, learn Skye | One of Scotland's Hidden Treasures |
| **Local tourism strategy** | No | Yes[38] | Yes[39] | No | Yes[40] | No | No | No | No |

[38] https://www.whistler.ca/sites/default/files/related/2007-06-whistler_2020_plan-second_edition.pdf
[39] http://www.lakedistrict.gov.uk/__data/assets/pdf_file/0012/169959/windermere_management_strategy_2011.pdf
[40] http://www.nevispartnership.co.uk/pdf/newnevis_strategy_summary.pdf

# Appendix G: Outdoor Activities per Country

| | Iceland | Norway | Chile | New Zealand | British Columbia | England | Wales | Scotland |
|---|---|---|---|---|---|---|---|---|
| River kayaking | x | x | x | x | x | x | x | x |
| Skiing & snow boarding | x | x | x | x | x | x | x | x |
| Mountain walking | x | x | x | x | x | x | x | x |
| Abseiling | x | x | x | x | x | x | x | x |
| Mountain biking | x | x | x | x | x | x | x | x |
| Quad Biking and 4X4s | x | x | x | x | x | x | x | x |
| Wildlife Safari Trips | x | x | x | x | x | x | x | x |
| Rafting/raft building | x | x | x | x | x | x | x | x |
| Coasteering | | x | | x | | x | x | x |
| Sailing | x | x | x | x | x | x | x | x |
| Survival Courses | | x | x | x | x | x | x | x |
| Sky diving | | x | x | x | x | x | x | x |
| Boat trips | x | x | x | x | x | x | x | x |
| Sea Kayaking | x | x | x | x | x | x | x | x |
| Canyoning | x | x | x | x | x | x | x | x |
| Archery | | x | x | x | x | x | x | x |
| Surfing | x | x | x | x | x | x | x | x |
| Via ferrata | | x | x | x | x | x | x | x |
| Paintball | x | x | x | x | x | x | x | x |
| Stand Up Paddle | | x | x | x | x | x | x | x |
| Bungee jumping | | x | x | x | x | x | | x |
| River-bugging | | | x | x | | x | | x |
| Ice climbing | x | x | x | x | x | x | | x |
| Rock climbing | x | x | x | x | x | x | x | x |
| Orienteering/ navigation | | x | x | x | x | x | x | x |
| Diving | x | x | x | x | x | x | x | x |
| Windsurfing | x | x | x | x | x | x | x | x |
| Kitesurfing | | x | x | x | x | x | x | x |
| Paragliding | x | x | x | x | x | x | x | x |
| Fun yakking | | | | x | | x | | x |
| High wire/ zip wire | x | x | x | x | x | x | x | x |
| Pony/horse trekking | x | x | x | x | x | x | x | x |
| Bird watching | x | x | x | x | x | x | x | x |
| Mountaineering | x | x | x | x | x | x | x | x |
| Flyboarding | | x | x | x | x | x | x | x |
| Heliskiing | | x | x | x | x | | | x |
| Hot air balooning | | x | x | x | x | x | x | x |
| Jet skiing | | x | x | x | x | x | x | x |
| Zorbing | | | | x | | x | x | x |
| Caving | x | x | x | x | x | x | x | x |
| Snowmobiling | x | x | x | | x | x | | |
| Dog sledding | x | x | x | | x | | | x |

# Appendix H: Outdoor Activities per Destination

| | Fort William | Aviemore | Oban | Isle of Skye | Peebles | Queenstown | Whistler | Ambleside | Betws-y-Coed |
|---|---|---|---|---|---|---|---|---|---|
| River kayaking | x | x | x | | x | x | x | x | x |
| Skiing & snow boarding | x | x | | | | x | x | | |
| Mountain walking | x | x | x | x | x | x | x | x | x |
| Abseiling | x | x | x | x | | x | x | x | x |
| Mountain biking | x | x | x | x | x | x | x | x | x |
| Quad Biking and 4X4s | x | x | | x | | x | x | x | |
| Wildlife Safari Trips | x | x | x | x | | x | x | x | |
| Rafting/raft building | x | x | x | | | x | x | x | x |
| Coasteering | | | x | x | | x | | | |
| Sailing | x | x | x | x | | x | x | x | |
| Survival Courses | x | x | x | x | | x | x | x | x |
| Sky diving | | | | | | x | x | | |
| Boat trips | x | | x | x | | x | x | x | x |
| Sea Kayaking | x | | x | x | | x | | | |
| Canyoning | x | x | x | | | x | x | x | x |
| Archery | | | x | x | x | x | x | x | |
| Surfing | | | | | | | | | |
| Via ferrata | | | | | | x | x | x | |
| Paintball | | | | x | | x | | | |
| Stand Up Paddle | | | | | | x | x | x | x |
| Bungee jumping | | | | | | x | x | x | |
| River-bugging | x | x | | | | x | | | |
| Ice climbing | x | x | | | | x | x | | |
| Rock climbing | x | x | x | x | | x | x | x | x |
| Indoor bouldering | | | | | | x | x | x | |
| Orienteering/navigation | x | x | x | x | | x | x | x | x |
| Diving | | | x | x | | x | | | |
| Windsurfing | | | | | | x | x | x | |
| Kitesurfing | | | | | | x | x | | |
| Paragliding | x | x | | | | x | x | | x |
| Fun yakking | x | | | | | x | | | |
| High wire/ zip wire | x | x | | | x | x | x | x | x |
| Pony/horse trekking | x | x | x | x | x | x | x | x | x |
| Bird watching | | x | x | x | | x | x | x | x |
| Mountaineering | x | x | | x | | x | x | x | x |
| Caving | | | | x | | x | x | | x |

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Highlands and Islands Enterprise

Iomairt na Gàidhealtachd 's nan Eilean