

**AT Stakeholders Workshop,
Glenmore Lodge, 16th March 2010**

Attendees:

Claire	Banbury	VisitScotland
Frieda	Bos	About Argyll
Sue	Crossman	Tourism Innovation Group
Steven	Dott	Highlands and Islands Enterprise
Sally	Dowden	Speyside Wildlife
Steve	Duncan	Forestry Commission Scotland
Paul	Easto	Wilderness Scotland
Murray	Ferguson	Cairngorm National Park Authority
Julie	Franchetti	Scottish Enterprise
Philippa	Grant	Rothiemurchus Centre
Alistair	Gronbach	VisitScotland
Emma	Guy	The Hub, Glentress
Patrick	Harrison	Aviemore Cairngorm Destination Management
Theresa	Kewell	Scottish Natural Heritage
Bob	Kinnaird	Glenmore Lodge/Sport Scot
Alasdair	Laing	Scottish Rural Property Business Association
Thomas	McGonigle	Dal-Riata (Facilitator)
Andy	McKenna	Go Where/ Tweed Valley Tourism Consortium
Elsbeth	Mclachlan	Loch Lomond & Trossachs National Park
Graeme	Mclean	Project Manager – Scottish MTB Framework
Sandra	Middleton	Aviemore Cairngorm Destination Management (part)
Katrina	Morrison	Scottish Enterprise
Colin	Simpson	Highland Council & Local Auths.
Shannon	Stowell	Adventure Travel Trade Association
John	Strang	Nae Limits
Ashleigh	Tooth	National Access Forum
Peter	Varley	Lochaber College
Caroline	Warburton	Wild Scotland
Colin	Williamson	7Stanes

1. Caroline Warburton/Paul Easto – AT in Scotland – Market Analysis, March 2010.

1.1 Adventure tourism definition – this includes consideration of adventure sports, activity and travel and what is appropriate in a Scottish context.

The definition of adventure tourism in Scotland is taken from ATTA’s definition of adventure travel, namely that it is “any trip that has two out of the following three aspects: physical activity, interaction with nature, and cultural learning or exchange” (ATTA 2009).

This definition is broad and intentionally so. It is based upon changing consumer needs and

*reflects the more experiential aspects of adventure as seen by today's adventure traveller.
"Today's adventure traveller seeks experiences beyond high-adrenaline sports. Adventure provides a mix of activities that enable **authentic, un-manufactured experiences.**"*

The Adventure Tourism product has traditionally been represented by adventure sports activities, such as mountain biking, white-water rafting or snowboarding. It is important to acknowledge that most adventure tourism definitions are broader than this and relate to the **experience** as much as the activity.

The report will shortly be available and also analyses:

- 1.2 The market for adventure tourism including current data & trends.
- 1.3 The current position in Scotland including the international context, product provision, product distribution and marketing communications.
- 1.4 The market opportunity including recommendations by the consultants for next steps.

2. Shannon Stowell, President, ATTA.

<http://www.adventuretravel.biz/default.aspx>

All slides etc. available from TiG.

Some key points about ATTA and the Aviemore summit (ATWS):

- Summit is in Aviemore, October 4- 7, 2010. <http://www.adventuretravelworldsummit.com/>
- ATTA has 540 members, global organisation, 5% are in the UK and half of those in Scotland.
- Members recognise that AT is a force for good – many have pro-poor or conservation policies mainstreamed in their businesses.
- The AT offer is often multi-activity e.g. walking & golfing, or combines with other aspects of tourism e.g. cycling and wine tasting.
- Definitions slightly grey, but human powered outdoor sports are considered as activity.
- Recommends "Authenticity" by Jim Gilmore
<http://authenticitybook.com/authors/>
- ATTA needs help from Scotland in working with Britain, Ireland, Wales etc.
- Strong possibility of a separate CEOs mini-summit post the main event.
- Influential media attend in numbers e.g. National Geographic Traveller.
- Pre-summit adventures taken by 25 – 33% of attendees: 2 – 7 day fam trip. 13 itineraries around Scotland being planned by VisitScotland. Media and tour operators. No payment, but attendees need accreditation to qualify.
- The Day of Adventure (October 4) – all delegates, ½ day of local activities,
- Summit – 3 days of meetings, with evening receptions etc.
- Interest from Loch Lomond NP and Lochaber College to be involved in pre-summits/summit.
- Field sports (fishing and hunting/shooting) not generally included in ATTA definition of AT as focus is on "non-consumptive" activity – however fly fishing is increasingly involved.
- Non-member, local operators can attend the summit.

3. Kristian B. Jørgensen of Fjordnorway (via Skype)

Some key points:

- 2008 summit hosted by VisitNorway “Powered by Nature”
- Great importance of media coverage provided by ATTA
- VisitNorway has put a major investment in ATTA – needs to be a long term, regular investment not a one-off.
- Results have included the introduction of e.g. cycling and hiking in to tour operator programmes (rather than just done informally.)
- Collaboration with ATTA changed the focus from “Come and Look” to “Come and Do”.
- Norway is creating a Centre of Expertise - £15million investment over 10 years.
- Positioned as a sustainable destination – much participation in skiing and hiking.
- Customers are attracted by theme
- Thematic positioning has resulted in cross-border marketing.
- Increasing spend and use of online marketing.
- FjordNorway makes connections e.g. helping a German tour operator to locate a small specialist adventure supplier.
- Skiing is not a key draw for the Fjord area, but the existing small resorts have linked to provide one multi-day ski pass. Individually not strong enough, but collectively they create a meaningful product.
- Quality control is a challenge! National Centre is defining quality standards.
- Quality is not just about the quality of the visitor experience – the actual product is often fine – but the quality of the business practices often let SMEs down. The National Centre is therefore helping with professional and business skills.
- Need to link the market and the product in an organised, strategic process. Need a plan to develop as an AT destination.
- Networking between operators to develop packages is an issue – they need to create relevant, market driven concepts (e.g. the ski pass) that focus on customer types that are common to more than one operator, or more than one market.

Conclusion

The benefits of the ATTA summit are considerable, but long term. The payback takes several years, and the investment must be kept up – Norway is again sponsoring the first lunch at the 2010 event. It was a turning point for Norway.

4. Steve Duncan – former VisitScotland lead on ATTA, now on secondment to Forestry Commission Scotland

- VS led the bid with CNPA, ACDM, WS etc. etc.
- Draft programme in place for summit.
- 13 ideas for Pre-trip adventures around Scotland planned in outline and with ATTA. Contact is Lindsay Symington at VS. Each trip needs a principal e.g. WildScotland is doing 2 wildlife trips. Wilderness Scotland and many others involved. Pre-trips not fully formed e.g. “Perthshire” is in as a destination, not every supplier contracted.
- Day of Adventure in Aviemore region is in hand. Being planned by ACDM.
- Wednesday evening was free. ACDM have plans for a variety of local events from ceilidh to Storytelling!
- Budget is an issue. Needs providers, suppliers and public sector to get behind the summit and get involved/host.

5. Emma Guy, Hub in the Forest, Glentress.

- Emma and her partner Tracey had long involvement in competitions – both pro MB athletes with sponsorship etc.
- MB in Scotland has taken nearly 20 years - started in early 1990s: hard core! Existing, natural trails, undesignated.
- 1999 built test trails with HLF funds. Had good trail building team. Planned The Hub.
- 2001: Foot & Mouth Disease. Closed the countryside. Caused delays in development.
- 2002 opened the Hub: specialist MB facility with cafe, instruction and rental. Created a hot spot for MB enthusiasts and gathered momentum.
- 7 Stanes project had substantial public sector investment to create 7 linked MB centres across Borders and D & G. Trail structure at each “stane” modelled on Glentress.
- Nearby Innerleithen has XC trail and specialises in downhill. No regular uplift, but there is a feasibility study for a chair lift at Innerleithen.
- Glentress has transformed MB industry, and led the way for Scotland.
- Currently in golden period for cycling: Road, Track, Sky team (a British team that will be riding the Tour de France.)
- Future? MB still a young sport. We have frontline experts and useful experience – need to embrace this and further develop.
- Continued development needs built facilities for visitors (changing rooms, interpretation etc.) but even more importantly it needs more all-weather trails.
- Hub revenues down this winter due to snow/ice on trails.
- Need more associated activities around the cycling, e.g. sphering, to encourage length of stay.
- Fort William is a different product due to the Gondola uplift transport. High adrenalin, competitive downhill. Major Competitions and Events there have helped. Glentress/7 Stanes benefits when FW has championships – visitors come to Scotland to **do** the 7 Stanes and **watch** the FW competition.
- Family market v. important at 7 Stanes. Blue and green trails as well as more serious ones.

Group Discussions

- We desire to build a sustainable successful business around wildlife, taking care of and hopefully benefiting the environment.
- Outdoor Access much unregulated in Scotland – surprising freedom to enter land, which calls for very high standards of behaviour and responsibility.
- Activity and Adventure has health as well as tourism benefits.
- Need for careful management, with a constant eye on sustainability.
- Difficult for small biz, often 1-man band, to produce or be part of the product and still have time for the admin, marketing, management, planning, going to meetings etc. This is a real impediment to growth. Many operators are in AT because they are v passionate about, and enjoy delivering the actual service – they don’t want to stay in the office.
- Pricing is an issue – lifestyle type businesses often undercharge. Little pricing discipline at mom. The quality provided does justify a competitive rate. Tiny margins make for non sustainable businesses.
- Guides need a living wage - it is their “real” job, not a side line for pocket money.
- `Difference between guides and instructors is critical: Guides give Visitor “Experiences” rather than providing courses/instruction. Scotland good at both.
- Need a proper, professional association for AT – a trade body, with people prepared to take on the leadership. Perhaps a forum, bringing together the existing assoc.
- Bob Kinnaird will speak to SAAF (more involved with regulation in the past.)

- Be mindful that Governing bodies (e.g. Mountaineering Council, Canoe Assoc) who would hopefully participate in a Forum, do not have tourism on their agenda. Exist for other reasons. But hopefully the summit could get them all talking for first time. Worthwhile legacy!
- Perhaps Lochaber College could help with bringing together the existing assocs – it's a neutral body. Could it do the admin of the Forum?
- Any new body should pay attention to business skills.
- Successful coalition has come together in shooting/field sports. Lots of groups with different interests, but it has worked because they have identified the areas where their interests do align. Agreed on one message.
- Brazil has 2 assocs, over 500 members. Part funded by Gov. The driving force bringing them together was safety standards.
- Market Intell – use the brains of the ATTA attendees. Use them for Market Research to help Scotland develop, while they're here/after.
- How to make a business out of say, Mountain biking when it is free to access FCS trails? Have to charge for the ancillaries only: food, bike rental, bike retail & repair, parking, guiding. Need to create **products** or experiences from these elements that can be sold.
- Ambition for AT to be a “globally understood brand”
- “Outfitting” is a commercial way of getting distribution out and about for AT experiences, i.e. sold to consumers by e.g. a VIC or in a retailer.
- Research would be useful. VS stats are v out of date, but some new research is in progress from other sources. Katrina M of SE has a handle on this.
- Stats: in current UKTS definitions, AT is very small but if include walking it becomes v significant.

Summary of Next Steps. See Market Analysis report for more detailed recommendations.

1. **Trade body or Forum** – find the shared interests initially around ATTA, hopefully leading to long term growth. UHI could be involved?

Action: CW

2. **Need for Market Intel** on the volume and value of adventure tourism. This to include a definition that works in Scottish context. (N.B. SE has recent research on MB, wildlife, and sailing.) Purpose: to understand the tourism markets, and develop commercial products and experiences around visitor needs

Action: ??

3. **Marketing Comms** by VS and others should reflect the wider definition that includes soft adventure, and fact that increasing number of AT enthusiasts are women, older etc. as demonstrated in the Analysis.

Vision – “Scotland, the Adventure Capital of Europe”. World class Events, Facilities and Instructors.

Wildlife and walking to be brought together in a collective, with e.g. coastal sports – Great Outdoors.

Action: VisitScotland, trade bodies and other stakeholders.