ADVENTURE TOURISM IN SCOTLAND

MARKET ANALYSIS REPORT

FOR THE TOURISM INNOVATION GROUP

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1 Introduction

1.1 In October 2009, the Adventure Travel Trade Association ("ATTA") selected Scotland as the next host destination of the Adventure Travel World Summit ("ATWS"). ATTA is a global organisation with 500+ member businesses and organisations from some 40 countries. The ATWS is the annual gathering of its members and is attended by approximately 600 delegates from around the world including trade, media and tourism destinations.

1.2 The ATWS 2010 will take place in Aviemore from 4-7 October 2010 and will be preceded by multiple 3-4 day Familiarisation/Media "Pre-Summit Adventures" and a "Day of Adventures" on Day 1 of the summit programme. There can be no doubt that this event represents a once in a generation opportunity for Scotland to demonstrate its adventure tourism credentials to a global audience.

1.3 The summit also provides a unique opportunity to evaluate the current state of the adventure tourism industry in Scotland and consider its future growth.

1.4 This report, which has been commissioned by the Tourism Innovation Group, is designed to provide an insight into the adventure tourism market, Scotland's current position within that market and what opportunities exist for future development of the sector.

1.5 The report is divided into four main sections. These are:

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

2. The market for adventure tourism including current data & trends.

3. The current position in Scotland including the international context, product provision, product distribution and marketing communications.

4. The market opportunity including recommendations for next steps.

1.6 The report is based upon a) secondary research derived from various sources and b) professional experience and understanding derived from operating within the adventure tourism sector both within Scotland and overseas. The secondary research used in this report is detailed in Appendix A.

2 DEFINING ADVENTURE TOURISM

Defining Adventure Tourism

2.1 In order to develop an understanding of the scale and extent of the adventure tourism market, the first step is to examine how the sector is identified and defined.

2.2 This section provides some discussion on defining adventure tourism and presents a broad definition for adventure tourism in Scotland on which this report is based. We also draw attention to some of the key factors influencing definitions of adventure tourism.

2.3 Both academically and within the industry there is little consensus on a definition of adventure tourism. Whereas core activities are well defined, such as sea kayaking, rock climbing, diving etc, the inclusion or exclusion of other activities is less clear, such as fishing, walking and wildlife-watching.

2.4 As a first point of reference, ATTA has sought to define adventure travel as *"any trip that has two out of the following three aspects: physical activity, interaction with nature, and cultural learning or exchange"* (ATTA, 2009). It is relevant to note that for the purposes of this study and the forward consideration of the sector, we consider it reasonable that adventure travel and adventure tourism are considered to be one and the same.

2.5 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."* (ATTA, 2009).

2.6 For VisitScotland, 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.

2.7 One example is the definition used by the Canadian Tourism Commission as *"an outdoor leisure activity that takes place in an unusual, exotic, remote or wilderness destination, involves some form of unconventional means of transport and tends to be associated with low or high levels of activity".*

2.8 The multi-national travel company, TUI Travel plc ("TUI") owns several of the leading adventure travel brands in the UK and overseas. In the UK, these brands include Exodus, The Adventure Company and The Imaginative Traveller. TUI considers adventure travel to include small group cultural and discovery trips, nature and wildlife holidays, walking, cycling tours, trekking, long distance overland journeys, 'adrenaline' experiences and polar expeditions (TUI Travel plc, 2010).

2.9 In Scotland there are many adventurous ways to explore the country, some of which are adventure sports, but certainly not all of them; for example cycling, walking, wildlife-watching and sailing. A study by ATTA in 2007 (quoted in ATTA, 2009) of 128 adventure travel companies showed that the top five activities offered were:

- Hiking/walking (81%)
- Cultural activities (68%)
- Trekking (55%)
- Wildlife/Nature (54%)
- National Parks (53%)

2.10 Historically, these tourism activities in Scotland have been addressed separately. However, for the purposes of this report and future development we consider these activities within the definition of adventure tourism in Scotland. This is a fundamental difference and importantly moves adventure tourism beyond adventure sports. Having regard to both published definitions and our operational experience, we consider that the activities which are most relevant to the adventure tourism sector (including Scotland) are:

- 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, snowboard, ski-touring, snow-shoeing, ice-climbing

2.11 Such an approach does not exclude more specialist activities such as skydiving, river-bugging or caving but instead aims to recognise the importance and contribution of the principal adventure tourism activities.

Other issues influencing definitions of Adventure Tourism

a) Risk

2.12 Risk is one aspect of adventure tourism that is regularly highlighted, implying thrill, excitement and danger as well as the unexpected and extraordinary experiences. The degree of risk is often a subjective issue. What is considered risky for one person may not be considered risky for another. Two examples might be a hill walk undertaken by a novice hill-walker and an experienced mountaineer, or an open canoe trip taken by a regular paddler and someone who can't swim. The same tour can mean different things to different people (Buckley, 2006).

b) Tourism v Day Visits

2.13 Tourism refers to those leisure activities which include an overnight stay, otherwise activities are termed day visits. Therefore by definition a group white-water rafting for the day would not be considered adventure tourism, it is however an adventure activity. Similarly if the same group were on the West Coast for a sea-kayaking day and stayed overnight they would become tourists. Whereas there is no doubt that day visits are important to the activity providers and the Scottish economy, they are not included in this definition.

c) Independent (Recreational) vs Organised (Guided) Activities

2.14 Buckley (2006) defined adventure tourism as *"guided commercial tours where the principal attraction is an outdoor activity that relies on features of the natural terrain, generally requires specialized sporting or similar equipment, and is exciting for the tour clients"*. Public outdoor access in Scotland means that for many, activities can be undertaken without the need for professional guides and activity centres and highlights a potential difference between adventure *tourism*, where a client pays a tour operator to provide an adventure experience, and adventure *recreation*, where individual participants carry out the same activity on their own.

For the purposes of this study, all adventure activities (recreational or guided) which include an overnight stay are included in the definition.

The boundaries of adventure tourism?

2.15 Using the ATTA's definition of adventure travel widens the traditional definition of adventure tourism considerably. Many holidays may include a combination of physical activity, interaction with nature and cultural learning or exchange. The boundaries between what is adventure tourism and what is not are both fluid and subjective and are often dependent on individual experience.

2.16 Wildlife tourism is a good example. Buckley (2006) comments that this sector may be classified as adventure tourism (as well as a sector in its own right) either because of the remoteness of the area, the mode of access or risks from the animals themselves. The principal focus may be on the activity, with wildlife as one component of the scenery and setting; or it may be on the wildlife, with the mode of access seen as a way to improve viewing opportunities. As illustration, a visit to the Scottish Seabird Centre may not be considered an adventure tourism experience by some but joining one of the centre's RIB trips to the Bass Rock might well be.

2.17 The key point is that the distinction is rarely clear-cut, and different participants may be more interested in different aspects of the same tour.

3 THE MARKET

Market Size and Economic Contribution

3.1 Owing to the lack of consensus on the definition of adventure tourism and the absence of comparable data, it is difficult to provide a definitive figure for the size of the adventure tourism market. However there are a range of studies and datasets that deliver insight into the market.

3.2 A survey of ATTA members in 2009, all of which are international adventure travel companies, provides an indication of the size of the market. Of the 276 responding companies, a total of 2 million customers each year were carried (ATTA, 2009). This equates to an average of 7,842 customers per company per year, with an average price point of USD $2,748.

3.3 A survey by YouGov in 2009 (quoted in TUI, 2010) provides fascinating data on the demand for (outbound) adventure travel. The analysis report by TUI (2010) predicts a 70% increase in participation in adventure travel over the next 3 years, in particular a doubling in activity, 'off-the-beaten track' and 'special interest holidays' and a trebling in 'adventure', 'eco-friendly/ethical' and 'discovery' holidays. Small group travel (all types, not just adventure) is predicted to increase to nearly eight million over the next three years (YouGov research 2009)

3.4 Up to 2008, the UK outbound adventure tourism market showed a growth rate of 10% per year, with a slight dip in 2009. However TUI has reported much stronger early bookings for 2010 and suggests that committed enthusiasts are now coming back for more.

3.5 In the UK, the outboard adventure tourism market is conservatively estimated at a minimum of 400,000 passengers a year, with tour operators carrying approximately 50% of the market (TUI, 2010). By comparison, Scottish tourism figures show that over 250,000 trips to Scotland by UK visitors involve adventure sports. The number of people involved in broader adventure tourism activities is significantly higher (see table below). This comparison brings into sharp contrast the importance and significance of adventure tourism in Scotland.

3.6 The number of adventure sports trips in Scotland is taken from the United Kingdom Tourism Survey (UKTS) which provides data on the relative importance of tourist activities in Scotland. This annual survey presents information on general UK tourists to Scotland, including which activities they undertake during their stay. Although the results provide comparative data, it is likely to underestimate the size of the market owing to the general nature of the survey and its sampling size and method for specific activities.

3.7 The UKTS definition of adventure sports includes the following activities:

- Organised adventure sports (white water rafting/sphering/canyoning/gorge walking)
- Kayaking/canoeing
- Surfing/windsurfing/kitesurfing
- Hangliding/parachuting/paragliding /ballooning
- Scuba Diving
- Mountaineering/rock climbing/ abseiling /caving/potholing

3.8 Other activities, such as walking, watching wildlife and mountain biking are not included in the UKTS definition of adventure sports and data is collected separately. The table below shows the 2008 data from the UKTS for some of the activities referred to in paragraph 2.10. Figures for other activities were not available.

UK Visitor Activities undertaken in Scotland (2008)

	Holiday trips (thousands)	Spend (£m)
Walking	1798	520
Watching wildlife	429	159
Adventure sports	253	66
Mountain biking	98	14

3.9 The table shows that walking is by far the most popular activity, with over 1.5million trips taken in 2008. The second most popular activity is wildlife watching with just under half a million trips, followed by adventure sports and mountain biking. This pattern is replicated in relation to visitor spend, with over half a billion pounds spent on walking activities or holidays, in comparison to £159milion for wildlife-watching activities and holidays.

3.10 In summary, it is very difficult to determine the exact size of the adventure tourism market. Nonetheless, it is reasonable to suggest that when considered cumulatively, the contribution of walking, wildlife, adventure sports and cycling make a very significant contribution to the Scottish tourism economy.

Other studies

3.11 Other studies have attempted to quantify the size and value of different activity tourism markets to the Scottish economy. By focusing on one activity, it can be argued that more accurate values can be calculated, with figures differing from the table above. The data cannot be combined or compared owing to different methodologies and displacement factors. The majority of studies appear to have been undertaken in 2003, which suggests that there would be value in updating these figures. The headline figures from the studies are shown below:

- **Walking:** In 2003, 4% came specifically to go walking and spent £125million. 33% of holidays included a walking element and these visitors spent a total of £952 million through 3.2 million visits (VisitScotland, 2006c).

- **Cycling:** In 2003, cycling as a tourist activity represented 1 million (or 8% of all) trips to Scotland and a total of £219 million revenue. The figures split amongst cycling as a main purpose of holiday trips, (100,000 (0.8% of all) trips and £20million expenditure) and cycling as part of a holiday trip (900,000 trips and £199 million expenditure). It is worth noting that these figures will exclude any of the significant growth derived from development of Scotland's mountain bike product in recent years (VisitScotland, 2006b).

- **Wildlife Tourism:** A study of wildlife tourism in the Highlands and Islands estimated that a total of 1.2 million trips were made by UK residents in 2002-2003. This translated to a net annual expenditure of £84.5 million for 2002/2003 and the equivalent of 1,651 full time jobs (George Street Research and Jones Economics, 2004).

  More recently a study by Wild Scotland of its members calculated that in 2008, its 70 members generated £9.3 million annual turnover, equating to £227,000 per company and an average spend of £258 per customer per trip (Wild Scotland, 2008).

  [A report on the economic impact of wildlife tourism to Scotland, commissioned by the Scottish Government and Scottish Natural Heritage was due to be published at the end of 2009, but it now due out in April 2010.]

- **Mountaineering:** In the Highlands and Islands in 2003-2004 mountaineering was reported as generating revenue of £245.7 million for 2002/2003 and supporting the equivalent of 4,466 full time jobs (George Street Research and Jones Economics, 2004).

- **Golf:** As a comparison, the economic impact of golf tourism to Scotland is estimated to be around £220 million. This is made up of two major elements, expenditure of visiting golfers and visitor expenditure generated by major golf events (Scottish Enterprise, 2009).

Market Segmentation

3.12 With over a third of UK visitors to Scotland participating in walking during their holiday, it is clear that adventure activities have a wide appeal. The traditional view of adventure tourists is that they are young or middle-aged people, and usually men. This stereotype is changing and research from VisitScotland and beyond indicates that the market for adventure tourism activities is expanding considerably.

The Domestic and International Market

3.13 In 2006-2007, VisitScotland undertook significant research on the UK market. From 10 consumer segments identified, VisitScotland is concentrating on the six segments which offer the best potential for increasing the volume and value of domestic tourism to Scotland. Of the six segments, four indicate an interest in active pursuits. Although there is no mention of what type of activities each segments would choose, it illustrates how important the range of activities are to visitors to Scotland. The four key segments are:

- Warm 1 (Affluent Southern Explorers): 'outdoor activities and golf'
- Warm 2 (Young Domestic Explorers): 'like to be active on holiday'
- Warm 3 (Mature Devotees): 'tour and watch wildlife from car'
- Warm 4 (Affluent Active Devotees): 'active pursuits'

For further information on VisitScotland's Consumer Segmentation research, please see http://www.visitscotland.org/research_and_statistics/visitor_research/uk__ireland/consumer_insights.aspx

3.14 For the overseas market, sightseeing, touring and visiting friends and relations are the key interests; the latter being particularly relevant to the USA, Canada and Australia. However, there is interest from near-Europe for the outdoor activities that Scotland can provide.

Research shows that along with other activities, walking and hiking in particular are important to certain overseas markets (see below).

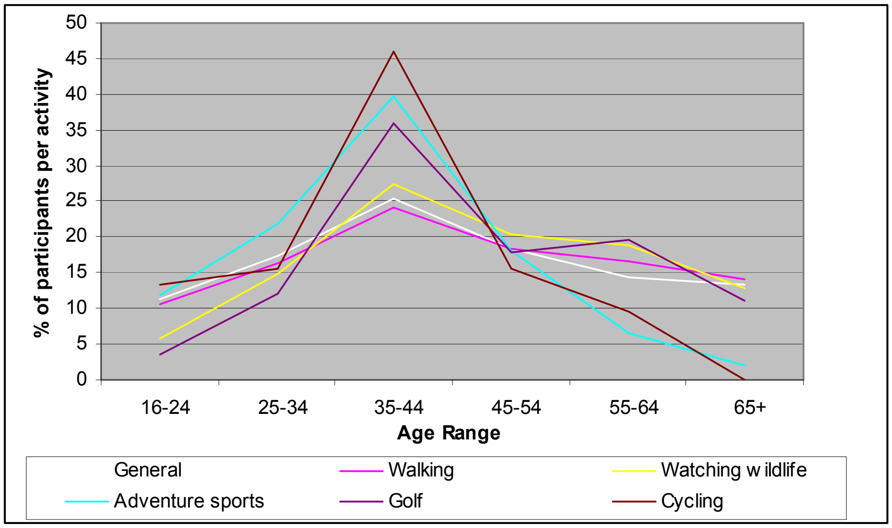
- France: walking/hiking
- Germany: walking/hiking
- The Netherlands: exploring the scenery and walking
- Spain: exploring scenery and walking.
- Sweden: exploring the scenery and walking
- Italy: exploring the scenery

For further information, please see http://www.visitscotland.org/research_and_statistics/visitor_research/international/europe.aspx

3.15 German and French tourists considered walking as the most important element (top main activity) of their visit, which was more than English and Welsh visitors (second main activity). Swedes and Italians and Swedes had walking as fourth and fifth activity (VisitScotland, 2006c).

Demographic Segmentation

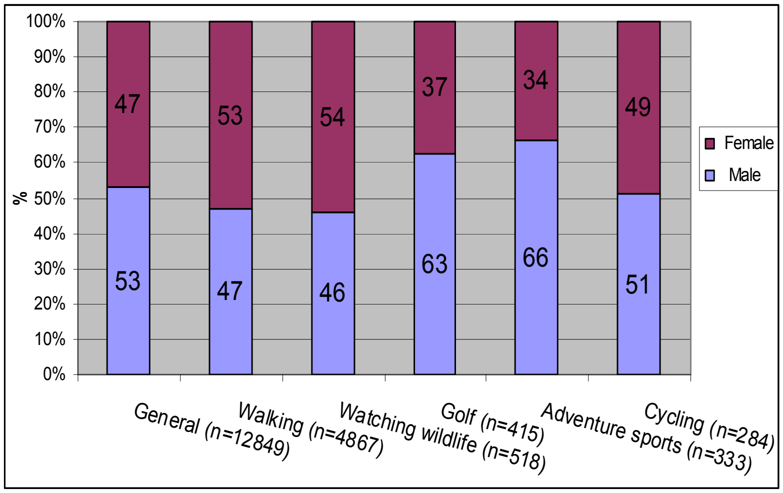
3.16 The graph below shows data from UKTS (2006-2008) on the age range of UK tourists involved in different activities. The white line is the main data set from UKTS and shows a fairly even distribution across the ages. Walking and wildlife-watching follow similar patterns, however more active pursuits, such as adventure sports and cycling shows a definite dominance of people aged 35-44 years which tail off markedly in the older age groups.



3.17 Population models show that by 2015, the 45 to 64 year old group in Britain will have grown by 22% (VisitScotland, 2006a). ATTA report that 25% of adventure travellers are over 55 years old. The adventure travel sector is no longer the domain of the young. This ageing population is generally wealthy, with free time, independent of family ties and with a desire to travel both domestically and abroad.

3.18 In contrast however, another element worth noting is the growth in family holiday and in particular multi-generational holidays. A steadily increasing birth rate from mid 2003 onwards will broaden the age base, creating increased demand for family holidays. The UKTS data (averaged 2006-2008) showed that 37% of adventure sports trips include children, compared to the average of 32%. Watching wildlife (45%) and cycling (46%) have the highest percentage of groups with children. TUI (2010) reports a trend towards multi activity family holidays, multi-generational experiences (something for everyone in the family), cultural experiences (encounters with real people) and opportunities for children to be with other children.

3.19 As well as being the domain of the young, adventure tourism was also considered to be the domain of the male. The graph below (from UKTS) shows that although this is still the case for adventure sports (2:1 male-female split), it is not the case for other activities, such as cycling, walking and wildlife watching.



3.20 Research in 2006 demonstrated that the market for adventure sports (of which canoeing and kayaking are a part) transcends socioeconomic groups, ages and gender. This supports the view that activity holidays are no longer just the preserve of young adrenaline seekers, but are becoming more 'mainstream', attracting more women, more over-50s and more families (Mintel, 2010).

3.21 More recently, YouGov (quoted in TUI, 2010) revealed that future demand will increase in the following demographic groups: single professionals; particularly females; affluent active families and inquisitive 50+ males and females.

Behavioural Segmentation

3.22 For Scotland to compete internationally as an adventure tourism destination it must cater for the needs of adventure tourists. Many adventure tourists are confident and experienced travellers, they therefore expect their experiences to live up to the expectations of other trips. They are regular internet users and use it to research and book their holidays and activities. They look for more than physical challenges, but experiences which are authentic to the destination.

3.23 Tourists are increasingly time poor and therefore require booking to be easy, information to be accessible and packaging of activities to be available where appropriate. VisitScotland research showed that over half of respondents interested in adventure tourism in Scotland would consider booking an adventure package trip, and four-in-ten would consider using the services of an adventure sports business (VisitScotland, 2006). ATTA (2010) survey showed that 73% of members reported a growing interest in shorter trips, and more activity-based adventures and TUI (2010) predicted a 5% growth in consumer demand for packaged trips.

3.24 TUI (2010) looked further into the issue of why people are choosing group travel and packaged trips. The key reasons were:

- Meeting like minded people
- Sharing an experience
- Acceptable and safe solo travel, particularly women in off the beaten track destinations
- Increasing requirement for comfort (adventure by day, comfort by night – a trend also noted in ATTA, 2009 & Buckley, 2006)
- Importance of 'security' (from financially bonded tour operators)
- Recognition of value of 'local destination' knowledge

3.25 There is a continued demand for sustainable holidays. Sixty three percent of ATTA members reported in 2009 that people were still willing to pay extra for 'green' trips (ATTA 2009), and TUI (2010) predicts a four-fold increase in demand for ethical and environmentally sensitive travel over the next three years.

3.26 Visitors are booking both holidays and day activities at shorter notice and tourism providers will need to adapt. A third of ATTA members believed that the shorter booking window was here to stay (ATTA, 2009). This trend has been observed by Wild Scotland members, 41% commented on more last minute booking (WildScotland, 2009). This trend presents challenges for all tourism businesses in terms of advance planning of resources and operations.

3.27 Another trend, online booking, has been noted for a number of years and many travel companies are refining (if not eliminating) traditional printed brochures. Forty six percent of ATTA members were eliminating catalogues in 2010, and over 70% were increasing marketing spend on Search Engine Optimisation and use of online social networking sites, such as Facebook and Twitter. TUI's adventure brands can boast over 30,000 active members regularly blogging, sharing photos and discussing trips (TUI, 2010)

Psychographic Segmentation

3.28 There is a growing body of work examining the 'emotional' aspects of adventure travel. As well-travelled, educated travellers, adventure tourists are increasingly looking for authentic and memorable aspects to their holiday and degree of emotional engagement. Visitors are looking for a challenge away from their everyday experiences. This challenge may be physical, intellectual or spiritual.

3.29 Research by ATTA (2009) asked its members why they worked in adventure travel. The results represented the essence of adventure tourism and could serve as ways of engaging with the industry (and consumers). The seven elements were:

- Transformation: discovery of the 'real me'.
- Discovery: the end result of exploration, and a prize for stepping out of the comfort zone.
- Deep Appreciation: appreciating something bigger, something timeless and more than our everyday encounters.
- Engagement: moving beyond a passive encounter to something that is active, engaging with people and people from different backgrounds, cultures and world views.
- Web of Life: seeing ourselves as part of an interconnected network of nature.
- The Real Thing: something can only truly be experienced by being there.
- Legacy: passing on the stories, ideas and beliefs.

3.30 Another piece of work by ATTA and Xola Consulting (2008) identified messages that resonated with Generation Y individuals (i.e. born after 1976). These messages were:

- Authenticity
- Challenge
- Affordability
- Remoteness
- Unique
- Learning something new and valuable
- Risk
- Unusual

3.31 Recognition of the value of the emotional appeal of adventure tourism is perhaps one of the sector's greatest strengths. TUI Travel plc (2010) noted the importance of providing 'memorable experiences for their guests'. They reported that 80% of activity holiday consumers cite their holiday as memorable compared to only 54% average for all holiday types.

4 THE CURRENT POSITION

Scotland in an International Context

4.1 The Adventure Tourism Development Index ("ATDI") (2008) produced by ATTA, George Washington University and Xola Consulting ranks 27 Developed and 164 Developing Countries based upon 10 "Pillars of Adventure Tourism Competiveness".

4.2 In the rankings, the UK is positioned 4th in the list of Developed Countries (Scotland is not ranked separately) achieving the highest scores for Sustainable Development, Infrastructure and Entrepreneurship. Switzerland (1st), Sweden (2nd) and New Zealand (3rd) were the countries ranked above the UK.

4.3 We agree with the approach used by the ATDI to distinguish developed from developing countries. In our view, the adventure tourism experience in countries such as Switzerland, New Zealand and Scotland are substantially different to destinations such as Peru, Nepal and Morocco. In the case of the latter, the unexpected and unpredictability of the destination are very much part of the adventure experience.

4.4 Accordingly, in considering Scotland's position in an international context we find it appropriate to make comparisons with destinations such as New Zealand and Norway. While it is beyond the scope of this study to compare these destinations like for like, it is evident that the brand communications of both of these countries are built on strong connections with adventure and nature. In the case of New Zealand – "100% Pure" and Norway – "Powered by Nature".

National Marketing by VisitScotland

4.5 The marketing of adventure tourism by VisitScotland is categorised by domestic (UK & Ireland) and international markets, with the focus being centred on the domestic market. It is beyond the scope of this study to determine what marketing of adventure tourism is being carried out on a regional and local basis.

UK & Ireland Marketing

4.6 Based upon VisitScotland's consumer segmentation model, the typical components of adventure tourism fall within the "Freedom", "Active" and "Culture and Heritage" interest categories of the product portfolio (the remaining product interest being "Cities"). These interests feed the content of the three current themed UK campaigns which are: Perfect Day, Autumn Moments and Winter White. As alluded to above, based upon VisitScotland's research adventure tourism experiences are of interest to consumer segments W1 – Affluent Southern Explorers, W2 – Younger Domestic Explorers and W4 – Affluent Active Devotees

4.7 There has been an increasing prevalence of adventure content in recent domestic marketing campaigns by VisitScotland e.g. the Perfect Day campaign featured wild landscapes, sea kayaking and wildlife.

4.8 In terms of web presence, walking, cycling, wildlife and adventure each have their own micro-sites directed from VisitScotland.com. While walking and wildlife benefits from prominent positioning on the main VisitScotland.com site, cycling and adventure are less visible featuring alongside horse-riding and fishing.

4.9 In addition, VisitScotland produces an annual Adventure Guide and a separate Scottish Mountain Biking Guide. The adventure guide runs with the strapline "Europe's Adventure Capital", although it should be noted that both of these guides are only available to UK and Ireland residents.

International Marketing

4.10 VisitScotland's core international markets are USA, Canada, Germany, France, Spain, Italy, Netherlands and Sweden. The international marketing strategy identifies five key brands for promotion. These are Touring, Golf, Ancestral, City Breaks and Walking.

4.11 These brands are communicated in a variety of ways including advertising, web, direct promotions, PR, exhibitions and the travel trade. Since adventure is not one of the prescribed brands, any relevant content e.g. mountain biking or wildlife, is currently communicated under the Touring brand. For example, the Pan Euro Touring Campaign 2010 has content aimed at attracting those consumers who have an interest in soft adventure e.g. gentle biking or wildlife.

4.12 The one exception to this overall approach is the promotion of walking to the German market. Given the level of interest from consumers in Germany, VisitScotland has produced a dedicated walking website and brochure for this market.

4.13 Referring back to the ATDI (2008), it is useful to note that the UK ranked significantly lower than both Norway and New Zealand in the image/brand criteria assessment. While the grouping of countries does not allow for meaningful conclusions to be drawn from this, there is enough evidence to suggest that, in evaluating current and future marketing communications, further research into Scotland's perception as an adventure destination in domestic and international markets would be extremely useful.

Supply Side Provision – The Adventure Tourism Product

4.14 There is a wide range of adventure tourism product throughout Scotland with particular concentrations in Aviemore, Fort William and Perthshire. Given the inherent problems with defining what adventure tourism is and the absence of a formal registration requirement, determining the total number of providers is not an exact science. As an indication, VisitScotland's own research in 2007 referred to findings by Page (2003) that there were approximately 350 specific adventure tourism businesses.

4.15 Wild Scotland, the trade association representing wildlife operators currently has 94 members while Activity Scotland, the trade equivalent for activity tourism has 32 members. Clearly the total current number of adventure tourism businesses is far in excess of these numbers. It is quite possible that the number now far exceeds the 350 businesses identified by Page in 2003.

4.16 It is evident from the sheer volume of providers that the adventure tourism sector in Scotland is currently very fragmented. Based upon our international experience, this is not atypical albeit in some destinations e.g. Chile you will find a critical mass of inbound tour operators with significant market share. It is interesting to contrast this with the UK outbound adventure travel market where eight tour operators have close to 60% market share (TUI Travel plc, 2010).

4.17 This fragmentation is most probably due to the low entry barriers that exist within certain sub-sectors of the market. For example, to set-up as an activity guide/instructor there are minimal capital and legislative requirements and access to market has become considerably easier with the advent of low-cost web technologies. As you would expect from a fragmented market, there is keen competition between businesses and, in many areas, limited product differentiation.

4.18 There are a variety of ways in which the existing adventure tourism product can be categorised. Given the structure of the market and the diverse range of services offered, many businesses may cover more than one category. However, we have sought to define the categories for the benefit of easy reference and further consideration. The categories are described as follows:

- **Adventure Travel Tour Operators** – these are fully-fledged tour operators that provide consumers with a package of services including accommodation, transport, guides and equipment as required. Such operators may work on a fixed departure group basis i.e. where dates are available for individuals or small groups to book and/or on a tailor made basis. They typically operate throughout Scotland although some specialise in particular regions. They may work direct with the consumer or through intermediaries e.g. outbound tour operators or destination management companies.

  Compared to other sectors of the adventure tourism market, the entry barriers are higher for tour operators as they have to comply with (increasingly) complex legislation regarding financial protection and reporting. Some operators may work closely in collaboration with other "non-tour operating" adventure providers. The market leaders in this sector are CnDo, Macs Adventure, Mountain Innovations, North West Frontiers, Shetland Wildlife, Speyside Wildlife and Wilderness Scotland.

- **Activity & Experience Providers** - this category probably represents the largest number 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 and/or national basis. Activities and experiences offered may last from a couple of hours e.g. whale watching cruise to several days e.g. a learn to rock climb course.

  These businesses range from single person operations to larger businesses which will have a dedicated administration function and team of instructors/guides. They may work exclusively in the leisure tourism market or in business tourism as well e.g. providing day activities for a corporate client. Some of the market leaders in this sector are Ace Adventures, Active Outdoor Pursuits, Boots and Paddles, Climb Mountains, Full On Adventure, G2 Outdoor, Highland Safaris, Nae Limits, Rockhopper Sea Kayaking and Seafari.

- **Activity Centres & Attractions** – throughout Scotland there are many activity centres and attractions that provide a range of adventure and nature based experiences. With regards to activity centres, some specialise in training, personal development and professional qualifications e.g. Glenmore Lodge, while many focus on the delivery of educational services to local authorities. Some of the centres have more of a leisure and a corporate focus offering a range of on-site activities e.g. Deeside Activity Park. Many of these centres have on-site accommodation in which customers can both dine and stay overnight.

  The adventure/nature visitor attractions are equally diverse covering sites such as Cream o'Galloway at Gatehouse of Fleet to the Ice Factor in Kinlochleven.

Natural Resources, Management and Development

4.19 One of Scotland's greatest strengths as an adventure tourism destination is the wealth of well managed natural resources that exist throughout the country. These include well managed private estates where access is encouraged, two large national parks, a network of National Nature Reserves and recreational forests plus many other formally identified sites of natural interest such as those owned by organisations like the National Trust for Scotland and the Scottish Wildlife Trust.

4.20 Combined with unfettered land access legislation, these resources offer a compelling advantage compared to other destinations which promote adventure tourism experiences.

4.21 In many cases, there can be no doubt that the management and development of these natural resources has contributed to Scotland's success as a destination in which visitors are free to experience and enjoy the outdoors. In some cases, developments have catalysed a transformation in the visitor economy. The obvious example is the 7 Stanes project in the South of Scotland, which has put the region on the world mountain biking map with a dramatic uplift in visitor numbers.

4.22 These natural resources will continue to be of fundamental importance to Scotland's attractiveness as a tourism destination and not just within the adventure tourism market. At the same time there is a need to recognise that there will be, at times, an inherent conflict between the management of such resources and the desire to maximise commercial benefit.

Product Distribution

4.23 Examining how the distribution of the adventure tourism product is currently managed is helpful in determining how future growth might be realised. Similar to most tourism services, the distribution channels for adventure tourism can be defined as follows:

- **Business to Consumer: Type 1** - in this channel, adventure tourism providers throughout Scotland secure business prior to the consumer arriving in the destination i.e. advance booking. This business is typically the result of a wide range of marketing activity including websites, print and digital advertising and personal referral/word of mouth.

- **Business to Consumer: Type 2 -** in addition to advance bookings, most adventure tourism providers benefit from bookings made by consumers once they have arrived in the destination. An obvious example of this would be a marine wildlife cruise which can be easily booked on a local basis, including on the same day. This type of business results from "on the ground" marketing communications such as leafleting in Visitor Information Centres or cross-selling between local businesses.

  While precise research data is not available, we believe that this is a very significant source of business for many adventure tourism providers in Scotland (tour operators excepted).

- **Business to Business -** in addition to the B2C channels, there are several adventure tourism providers who work on a business to business basis. This may take many forms and includes the leisure and business tourism markets. Examples of this may include:

  - An adventure tourism tour operator will effectively act as the "in-country" partner/ground handler for an inbound tour operator working within the same market.

  - An adventure tourism tour operator/ provider works with another travel agency or DMC to deliver an adventure component for a specific client.

- An adventure tourism provider works direct with a corporate client to deliver an adventure focused event, incentive or training.

4.24 In assessing how the adventure tourism product is currently distributed in Scotland, it is useful to draw comparisons with other destinations. The three distribution channels described are to a lesser or greater extent, adopted throughout the adventure tourism industry worldwide. Depending upon the destination, some channels may be more important than others. For example, in logistically challenging countries such as Peru, the B2B relationship between inbound and outbound tour operators plays a very important role.

4.25 With regards to the B2C Type 2 channel, the promotion and provision of adventure tourism in Scotland (with one or two notable exceptions) differs significantly to many other successful destinations. In particular, countries like New Zealand, Chile and the United States have a culture of "adventure outfitting" which is highly visible to the consumer. In practice, this means that visitors to a destination can easily find an outfitter's shop or office where they can book a range of activities to enjoy during their stay. In some destinations such booking services are also available through local visitor information centres.

4.26 As noted, there are some businesses in Scotland which have applied this model in a Scottish context. At Rothiemurchus Estate, visitors can call in at the Estate Centre and book a range of adventure and wildlife activities including mountain biking, guided wildlife walks and high-ropes. Also in the Aviemore area, Active Outdoor Pursuits has recently established a presence akin to that found in other destinations. Highly visible on the main road into Aviemore, visitors can book activities, enjoy the on-site cafe and browse the retail. While such models are initially capital intensive, we do consider that the promotion of adventure tourism in this way is likely to yield the same favourable results in Scotland that have been experienced elsewhere in the world.

4.27 With regards to B2B distribution, our experience suggests that there is also an opportunity to develop this route to market for many adventure tourism providers. There is an increasing interest from the mainstream travel trade in adventure and wildlife experiences; often as part of a wider "touring" package. Developing understanding and familiarity with how the travel trade works will assist the potential for growth in this area.

5 THE MARKET OPPORTUNITY

Market Growth

5.1 This study strongly suggests that adventure tourism is not just about adventure sports. It is much wider reaching than that and, even in its current state, it is of significant importance to the Scottish tourism economy.

5.2 Furthermore, current market research suggests that the demand for adventure tourism experiences will increase substantially in the future. As referred to above, the YouGov Survey (2009) quoted in “A Passport to Adventure” TUI Travel plc (2010) revealed the following:

- A predicted 70% total increase in participation in adventure travel over the next 3 years.
- Participation in either Activity Holidays, Off the Beaten Track Holidays or Special Interest Holidays to nearly double over the next 3 years.
- Participation in either an Adventure Holiday, Eco-Friendly/Ethical Holiday or Discovery Holiday is predicted to treble over the next three years.

5.3 At its best, adventure tourism excels in the experiential, the authentic and the sustainable. There is a substantial body of evidence, including that conducted by ATTA (2009) and Tourism Intelligence Scotland (2008) which suggests that this is what the tourists of tomorrow are looking for.

5.4 Predicated upon this research, a strong case can be made for the future positioning of Scotland as an adventure destination of first-choice. In the Scottish context, pursuing a growth trajectory should be considered for the following reasons:

1. While much progress has been made over the past decade, the Scottish adventure tourism market is still immature compared to other destinations.
2. At present, Scotland is generally not recognised as an adventure destination despite having an excellent range of products and providers (see brand communications below).

3. The adventure tourism market is high value typically generating daily spend far in excess of the £64 per visitor night average (VisitScotland 2008). For example, a day of guided rafting, canyoning or sea-kayaking alone costs in the region of £60-£90 per person.

4. The overwhelming majority of adventure tourism activity takes place in rural areas. Development of the sector accords with the objectives of the Government's Economic Strategy on many levels (wealthier, greener and healthier). In particular, development would make a significant contribution to the Government's specific objectives on regional equity and the Scottish Rural Development Programme (Scottish Government 2007).

5. Adventure tourism is, by definition, a highly sustainable form of tourism. Supporting the future growth of the sector will greatly contribute to VisitScotland's aspiration of being the most environmentally, economic and socially sustainable tourism destination in Europe.

Product Development

5.5 Viewed in an international context, Scotland's adventure tourism product occupies a position of strength. There are many professional adventure tourism providers throughout the country, delivering a wide range of experiences. Many providers could be singled out for delivering a genuinely world-class tourism experience. The private sector is supported by an impressive network of well managed natural resources and recreational developments.

5.6 The sheer accessibility of adventure tourism experiences in Scotland is also a distinct advantage over other destinations. For example, in the same day it is possible (and near guaranteed) to watch red deer in the Cairngorms and dolphins in the Moray Firth. 4 hours drive time of Edinburgh and Glasgow, covers an incredible diversity and range of product.

5.7 Notwithstanding these comments, we consider there are some areas which would benefit from development and improvement. The product issues identified are certainly not exhaustive, but instead highlight some of those that we are aware of which could be addressed.

5.8 As with all overnight tourism experiences, the accommodation sector plays a vitally important role. There is certainly scope to examine how existing and potentially new provision could best meet the requirements of the adventure sector. These requirements range from the type of accommodation through to the facilities and services provided. We are aware that some work has already been done by Scottish Enterprise on the walking market and this would prove a useful starting point.

5.9 There is also a case to be made for looking at how the visitor experience is delivered from start to finish. We believe that considerable strength exists in the actual delivery of the product "on the day", with the challenge being how to replicate this high quality through all stages of the customer journey e.g. at the initial enquiry stage and what feedback mechanisms are in place. In addressing this issue, there needs to be recognition that many adventure providers are one or two person operations who are responsible for all aspects of the business; therefore resource constraints apply.

5.10 A similarly related issue is the important distinction that exists between instruction and guiding in an adventure context. Scotland is endowed with a strong pool of well qualified and experienced instructors. However, the requirements of the adventure tourist are typically guided and experiential rather than instructional. There is an important blend of skills that are not taught as part of professional outdoor qualifications. An adventure guide should ideally have such skills, including good knowledge of the natural and cultural heritage, be an effective communicator (possibly including foreign languages) and possess a high level of emotional intelligence.

Brand Communications

5.11 Having been engaged in domestic and international marketing over the past decade, it is our considered experience that Scotland is generally not perceived as an adventure tourism destination. Especially when compared to other destinations, we believe there is limited brand salience among potential visitors at the purchasing stage i.e. Scotland is not "top of mind" when it comes to adventure. This view is supported by the findings of the ATDI described above (accepting that this relates to the UK as a whole rather than just Scotland). Further research on this topic would be helpful in determining precisely how Scotland is perceived in domestic and international markets.

5.12 It is certainly the case that progress has been made in the domestic market in recent years, through relevant VisitScotland campaigns and high profile adventure events such as the Mountain Bike World Championships and the Adventure Race World Championships (both 2008). Internationally, adventure tourism remains an ancillary component of the "Touring" brand rather than a brand in its own right while "Walking" benefits from targeted communications in selected markets.

5.13 In contrast, two of Scotland's competitors in the international tourism market – New Zealand and Norway have positioned adventure and nature at the core of their brand strategy. New Zealand's "100% Pure" brand was recently ranked by the United Nations World Tourism Organisation and European Travel Commission as the world's leading destination brand (2009). New Zealand's position was also recognised in the ATDI (2008), achieving the maximum score on image/branding.

5.14 Norway is also an interesting example, since the adventure tourism product is still in its infancy and, in recent years, has actually looked to Scotland for advice on how to develop the industry. Nonetheless, VisitNorway's recent "Powered by Nature" international marketing campaign positions the destination firmly in the mind of the adventure consumer.

5.15 The ATWS in October 2010, provides a unique opportunity to showcase Scotland as an adventure tourism destination and demonstrate to the travel trade and travel media what the country has to offer. In terms of international marketing, the summit could provide a springboard to evaluate how VisitScotland's marketing strategy might evolve to incorporate adventure in future brand decisions. We would certainly see this as a process of evolution rather than revolution, in which Scotland's existing brand values - enduring, dramatic, human - are interwoven into future adventure campaigns. Incorporating the country's nature, culture and history into any adventure tourism experience is what, in our view, gives Scotland a distinct offer in an internationally competitive market.

Collaboration

5.16 We consider there to be significant opportunities to increase the level of collaboration both within the adventure sector and across the wider tourism sector. It has been noted above that the adventure tourism market is currently very fragmented with strong competition and, in many places, undifferentiated product. In our opinion, a shift towards more collaboration and cooperation could deliver enhanced performance within the adventure sector through cost efficiency, improved distribution and greater profitability. Ultimately, the sector will determine if such collaboration is appropriate and worthwhile. With this in mind, it is important to note that many providers value the autonomy and flexibility of operating independently although, in this case, collaboration should be about doing a greater amount of business, better, easier and more profitably.

5.17 Across the wider tourism sector, we also consider significant potential exists to contribute to growth in the adventure tourism market through cross sector collaboration. This growth potential is immediate and largely comes down to improved communications. At a local level, there are obvious opportunities to increase the level of cross-selling that is taking place. We understand that is already happening in some places throughout the country and make take different forms from simple referral to collaborative packaging of experiences (notwithstanding the legal implications of the latter).

5.18 In our view, the best way positive relationships can be fostered is for the individual businesses to experience the product first hand. This may mean a wildlife boat operator taking out a dozen accommodation providers to explain in detail what type of experience the customer can expect and address the typical questions asked by prospective purchasers e.g. What wildlife can I reasonably expect to see? Will I get sea sick? Can I organise a private trip? At the same time, it would be incumbent upon the same boat operator to spend time with the same accommodation providers to learn more about their business and how they look after their guests.

5.19 Depending upon the level of commitment such collaborative models can, of course, be replicated on a regional and national basis. Also at a national level, further opportunities exist to improve the connectivity between adventure tourism providers and the travel trade. Opportunities for trade partnership may arise from businesses located within Scotland, the UK or further afield. A typical example might be where a London based Destination Management Company, acting on behalf of a client, is seeking a company to deliver one day of activity within easy reach of Scotland’s Central Belt. They may not have a fixed idea on what they want, other than it must be no more than 90 minutes from Edinburgh/Glasgow, be approximately 4-5 hours in duration and include lunch.

5.20 In this case, any adventure provider that is known to the DMC is in a strong position to win the business. Developing such relationships requires a certain level of investment e.g. a visit to the DMC’s London office to present the product plus an understanding of how the trade operates. Although this is not complicated, there are clear differences in working in such a B2B arrangement including relationship management, customer service levels and pricing.

6 RECOMMENDATIONS

6.1 Prior to finalising the recommendations in this study, a stakeholder workshop was held at Glenmore Lodge on 16 March 2010. The workshop considered the implications of the ATWS 2010 and discussed how this event could act as the catalyst to achieve a step-change in the Scottish adventure tourism sector. The key issues considered were:

- Is growth in adventure tourism desirable and wanted by the industry?
- What are the industry's aspirations and level of ambition?
- What innovations are required in order to realise this ambition and how will they be delivered?

6.2 At the workshop there was a clear consensus that Scotland has the potential for significant growth and should aim to become a "destination of first choice" for adventure tourism. Having regard to the issues discussed and the desired outcomes, we have formulated the following recommendations:

Recommendation 1 – Industry Body/Forum

6.3 Critical to the development, improvement and promotion of the adventure tourism industry in Scotland will be a single industry forum or body. At present, there are several organisations in existence which represent the interests of adventure tourism providers. These organisations include Wild Scotland – who represent wildlife operators and Activity Scotland – who represent activity operators.

6.4 These organisations share many common interests and we consider it would be highly desirable to explore ways in which they could collaborate, ideally as a single entity representing the interests of all adventure tourism operators. There would be many advantages to this approach, including:

- A dominant and clear "single voice of the industry" would be established, thereby improving communications with government and VisitScotland. This would be particularly relevant to the creation of any adventure tourism development strategy for Scotland.

- Change within the industry would be easier to facilitate. For example initiatives on best practice, distribution (e.g. “outfitting”), training or the visitor experience could be easily co-ordinated for the benefit of all members.

- Collaborative marketing between members and across sectors would be easier to achieve. Higher visibility in national and international marketing campaigns developed by VisitScotland is also likely to result.

- Increasing the prospects of engagement for many adventure tourism providers in Scotland, to the benefit of the industry and the visitor.

6.5 The formula for a single industry body will require careful consideration and we would recommend drawing on experience and critical success factors from other tourism sectors e.g. Golf Tourism Scotland or Country Sports. The ATWS could provide an effective way to initiate a forum, representing a specific opportunity around which to explore common interests.

Recommendation 2 – Market Intelligence

6.6 Further research on the volume and value of the adventure tourism market to Scotland is desirable. This would provide understanding of the demand and supply side, providing context for the development of commercial products and experiences based on visitor needs.

6.7 While the definition of the market is fraught with difficulty, we recommend that the activities specified in Paragraph 2.10 are used as the starting point for future research on this topic. In considering this, we believe that any assessment of the adventure tourism market needs to carefully address the relevance of walking given its significance to the Scottish tourism industry. Our recommendation is that walking should only be included if it is considered by visitors to be the main purpose of their trip to Scotland.

6.8 To provide a reference point for new research and to make existing data available for the benefit of the industry, we further recommend that all relevant market research is published on the Tourism Intelligence Scotland website.

Recommendation 3 – Marketing Communications

6.9 In the context of the current review of VisitScotland.com and given the changing nature of demand for adventure tourism expressed in recently published research, we recommend a full review of existing national adventure brand communications, including content on both the main website and related micro-sites. In making this recommendation we recognise that any significant changes will be dependent upon the future brand decisions of VisitScotland.

Recommendation 4 – ATWS Related Activity

6.10 In order to maximise the opportunity presented by the Adventure Travel World Summit, we consider there are several activities which merit progress. These activities are in addition to those already planned by VisitScotland, Cairngorms National Park, Aviemore and the Cairngorms DMO and other members of the summit working group.

6.11 The first activity relates to the ongoing engagement of adventure tourism providers with the summit. Wild Scotland and Activity Scotland have already initiated this process and will continue to communicate why and how the industry can get involved.

6.12 Secondly, an industry communications plan should be developed for the summit. We recommend that this plan includes details on the following: the range of opportunities available through the ATTA network; the profile of attendees; and, most importantly the key communication messages from the Scottish adventure tourism industry

6.13 Thirdly, the summit represents a unique opportunity to gather market intelligence from the trade, media and other key decision-makers/influencers in the global adventure tourism industry. For all those attending the Pre-summit Adventures and Day of Adventures, feedback should be gathered to gain an expert insight on Scotland's perception as an adventure tourism destination and the quality of experience and product on offer.

6.14 Finally, the industry should co-ordinate with VisitScotland and the Cairngorms National Park to determine what marketing collateral e.g. video, display stands etc will be available at the event in order to showcase Scotland in the best possible way. Many operators may well be able to contribute to content on a free or low cost basis.

APPENDIX A - REFERENCES

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