

Global Travel & Tourism Partnership

The College of
Haringey, Enfield
and North East London



2015 Research
United Kingdom Case Study
Sustainable Adventure Tourism

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GTTP
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A BUSINESS AND EDUCATION ALLIANCE

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ADVENTURE!

1. Acknowledgements

We want to express our thank you to the GTTP, for letting us represent our country as well as our amazing college and our Tutor who has always supported us in the good and bad moments.

We would also like to thank a few companies we have had the privilege of showing you and which without their help we wouldn't been able to complete this research.



We would also like to thank the following organisations for their help during our research...



We thank Visit Scotland for their overview article



We thank them for helping us in our research



Jerome Mayhew (Managing director of Go Ape)



We thank them for helping us in our research



Marian Austin Managing Director at Nevis Range Development co ltd

2. Introduction



When we think of the UK we automatically think of English tea, countryside, history and culture, we don't think of adventure tourism or sustainability however major operators such as PGL, Exodus, Headwater holidays and Explore, all feature the United Kingdom as an adventure destination, Visit Scotland alone has around 119 sports companies listed. The companies cover 47 activities ranging from skiing and hiking to sphaering and skydiving. It is noted that adventure tourism is split into two categories, Hard and soft tourism.

Statistics taken from the tourism alliance shows that the UK tourism market total revenue from tourists in 2013 was estimated at £125.7bn, most of the income coming from day visitors (54.0bn), however the value of the tourism to the UK economy is £126.9bn which makes up 9.0% of the gross domestic product.

Our research will be focusing on adventure tourism and sustainability in the UK, we have contacted a number of major tourist companies which include Haggis adventures, Go Ape and Zip world that provide sustainable adventure activities. In the UK tourism is predicted to grow and adventure tourism will play a part in this growth.

Tourism is predicted to grow...



+6%

international demand growth p.a.

+1.5%

outbound demand growth p.a.

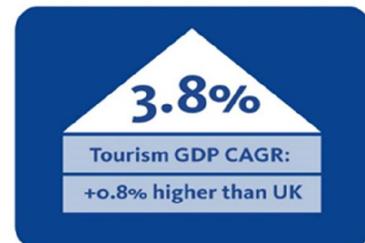
+3%

domestic demand growth p.a.

...and be worth

£257.4bn
by 2025

providing...



3. Case Study

In this case study about sustainable adventure tourism in our region, the United Kingdom, we have conducted research on the growth and sustainability of adventure tourist activities.

This case study explores the degree of which established visitor attractions embody the principals of sustainability on their operations, while promoting the UK as an adventure tourism destination.

The case study is published upon sources taken from the companies themselves and communication with members from their teams.

The organisations we have chosen represent how different companies contribute in making UK adventure tourism more sustainable. The organisations are recognised at both local and national levels for their contribution to the promotion of sustainable tourism, the fore organisations are:

Go Ape

One of the UK's fastest growing outdoor adventure tourist parks, with 54 outdoor adventure sites nation-wide.



Wilderness Scotland

Scotland's number one for adventure tourism, winning both "Green Tourism gold" award and "best adventure travel company"



Nevis Range

A government run organisation based in the Scotland highlands offering adventure tourist mountain sports, mountain biking and much more.



Haggis Adventures

A family run organisation which provides tourists with adventure coach trips around Scotland's highlands as well as offering experiences.



4. Brief story of Adventure Tourism

Humans have been engaging in adventurous travel for hundreds of years via exploration by the like of Marco Polo, Captain James Cook, and Sir Ernest Shackleton, who had primarily scientific, geographic, or colonial motives. However, commercial adventure travel is a relatively new phenomenon, in which travellers hire a professional guide to provide a range of technical support and equipment, as well as culture and nature interpretation.

In the mid-1800s, adventurers began to push the limits of mountain climbing and river rafting, with the first ascent of the Matterhorn in 1865 and descent of the Colorado River in 1869. Shortly thereafter, two key institutions were formed. The National Geographic Society was formed in to increase and diffuse geographic knowledge” and the Explorers Club was formed in 1904 to “promote the scientific exploration of land, sea, air, and space”. Both institutions continue to support adventures and expeditions today.

Today, Adventure Tourism is a vibrant, dynamic, and fast-changing sector with new variants routinely added into the possible experiences. Individual companies are often small, owner-operated businesses led by entrepreneurs with a drive to share their favourite places and passions with others. Adventure offers opportunities to entrepreneurs in rural areas around the world to do the same. 69% of overall international travel departures leave from Europe, North America, South America, and together these three regions account for over USD 263 billion in adventure travel expenditures.

WHAT IT IS:

Tourism is one of the most rapidly growing sectors in the world, and adventure tourism is one of its fastest growing categories. Increasingly, countries in all stages of economic development are prioritising adventure tourism for market growth, because they recognise it has ecological, cultural, and economic value.

To date no definition of adventure tourism exists in UNWTO (the world tourism organisation) literature, however the adventure travel trade association (ATTA) defines adventure tourism as a trip that includes at least two of the following three elements: physical activity natural environment, and cultural immersion, while the definition of adventure tourism only requires two of these components, trips incorporating all three tend to afford tourists the fullest adventure travel experience – for example, a trip to Peru that involved trekking (physical activity) through the Machu Picchu trail (natural environment) and genuine interaction with local residents and indigenous peoples (cultural immersion).

Adventure tourism can be domestic or international, and like all travel, it must include an overnight stay, but not last longer than one year.

5. Types of Adventure Tourism

There are two main categories of adventure activities, **hard adventure or soft adventure**, and vigorous debate often surrounds which activities belong in each category. The easiest way to identify an adventure trip as hard or soft adventure is by its primary activity. Both hard and soft adventures are highly lucrative segments of the adventure tourism sector. The cost of just the permit to summit Mt. Everest, a hard adventure activity, is estimated to be USD 11,000 per person for 2015. When all of the other factors are added in, such as training, gear, airfare, tour guides, etc., the average total cost to summit Mt. Everest will be about USD 48,000 per person.

A few examples of different adventure activities are:

Zip lining

Skydiving

Animal encounters

Caving

Bungee jumping

Paragliding

Biking

Scuba Diving

Hiking

Surfing

Fishing



6. What is Sustainable tourism?



There are many different interpretations of sustainable tourism however the most common definition is that sustainable tourism is tourism that avoids damage to the environment, economy and culture of the destinations we visit, enjoying the world without compromising it.

Statement taken from National Parks Authority, Wales

“(Sustainable tourism) is any form of development, management or tourist activity which ensures the long term protection and preservation of natural, cultural and social resources and contributes in a positive and equitable manner to the economic development and well-being of individuals living, working or staying in protected areas.”

European charter for sustainable tourism

What makes an adventure tourism destination sustainable?

Sustainable travel encourages a manageable number of visitors into a destination, so that less damage is done to the environment, and people will continue to want to visit, which means local people can find long term careers in tourism, so that people can remain in rural areas and live traditional lifestyles. Our research will look at destinations as well as operators in the UK that offer adventure tourism and look at their sustainable policies. This will include contacting the national tourist organisations such as Visit Britain and Visit Scotland.

Sustainable tourism certification

Certification from a green certification scheme demonstrates to customers and potential customers that the business is genuinely sustainable. Visit England has a number of schemes to ensure they assess businesses to a high standard and only promote those who are truly sustainable. Each scheme has a rigorous verification process and will fully assess the green credentials of the business

Green tourism business scheme

The green tourism scheme is a UK based organisation, the scheme is the largest certification of its kind, assessing hundreds of tourist activities and organisations each year.

The green tourism scheme consists of 3 awards bronze, silver and gold, each activity, organisation is ranked from this.

Bronze

Typically has some ethical or green purchasing such as fair trade coffee and some local sourcing, has low energy lighting in most areas has good general recycling systems and promotes either local public transport or activities to do without the car such as walking and cycling. A green co-ordinator is working to reduce impacts in all key areas.



Silver

The business shares its values in going green to both staff and customers. With significant use of recycled products as well as recycling to close the loop. The business sources from ethical and local sources extensively and is working to green its whole supply chain. Energy and water efficiency are key issues with evidence of heating and lighting changes to be more efficient. Showers and taps are effective but not wasteful. Monitoring of resource use such as energy water and waste is helping to deliver significant changes.



Gold

The highest standards of sustainability are being achieved with a strong and broad ethos and excellent examples throughout. The latest technologies will be employed from LED lighting through to efficient boilers and even renewable technologies. The business has efficient control of resource use and can demonstrate effective monitoring with targets for savings. Green procurement will include sustainable fish/meat sources, a range of ethical products and working with local suppliers to provide fresh, local and even organic items. Changes in working practices are leading to significant benefits to the business, community and supply chain.



7. Go Ape



What is Go Ape?

Go Ape is the UK's number one supplier for day forest adventure providing 54 adventures UK wide in 2015 including tree top adventures, forest Segway, tree top junior and zip trekking adventure guaranteed fun for all the family

Sustainability

After conducting our research and contacting Go Ape about their sustainable policy this is what we discovered.

Go Apes adventure parks are located in some of the UK's most vulnerable and beautiful environments and they take great care and responsibility to care for these areas seriously.

When Go Ape designed their tree top adventures they worked very closely with environmental specialists to ensure the lowest possible impact on the forest. They assured us no damage was done to any trees i.e. bolting platforms instead they use braces that grip onto the trees and loosened as it grows, trees are also inspected annually to ensure their health.

All courses are also friendly to wildlife, scrap wood and wood peel which could be passed as waste creates a new habitat for small creatures and the underside of the course platforms have been proven a perfect shelter for nesting birds, in addition they also recycle as much material as possible.

And lastly Go Ape always use local goods and services in the production and maintenance of their courses; and for their groups and events packages they use local conference facilities and local caterers who source and use local produce.



8. Haggis Adventures



HAGGIS ADVENTURES

What is it?

Haggis adventures is a 5 star day bus trip service focusing on the beautiful and breath-taking landscapes, history and culture, visiting famous sites such as loch ness, Scottish highlands and castles. Haggis adventures also offer extended trips through the Isle of Skye and much more.

Responsible visitor charter

Upon arrival to their haggis adventure all guests are given a “responsible visitor charter” this is a document that tells the customer what the organisation does to save the planet and help the local community.



Responsible Visitor Charter

Scotland is renowned for its outstanding natural beauty, iconic landscapes and breathtaking wilderness. We are proud of our country and want to preserve it for future generations to enjoy.

Each and every one of us has an important part to play in the protection of our environment. Therefore, we welcome contributions and suggestions from both our team and our customers on how we can be better.

We are committed to sustainable tourism practices

- to carry out our operations whilst respecting our environment and communities
- to minimise the possibility of environmental damage or the dilution of indigenous cultures
- to exceed relevant environmental legislation
- to welcome contributions and suggestions regarding environmental management practices
- to support local charities
- to review new practices and innovations and to minimise environmental impact

Here are some tips on how you can help

Travel – travel with us and you are already saving energy. However, after your tour use public transport where you can. For up to the minute travel and public transport information please contact - <http://traveline.info/>

Water – We all need to conserve water. Turn off the tap when cleaning your teeth and always follow towel policies in hotels and B&Bs.

Energy – Please turn off lights when you leave the room and close windows when the heating is on.



Green Tourism Business Scheme - Look out for the symbol and please support those businesses that are working to reduce their carbon footprint. The award is also open to tour operators, visitor attractions, activity providers, accommodation providers, restaurants and other businesses.

Nature - Respect nature and wildlife by not littering, guarding against fire and using footpaths and cycle-ways responsibly. All of our Guides are trained in 'Leave no trace' and will ensure you follow the Countryside Code <http://www.countrysideaccess.gov.uk>

Shop Local - Use local products and services. They give you a flavour of the area and help support local communities. We are fortunate to have some fantastic producers of food, drink, and arts and crafts in our region. Ask and we can help! Alternatively you can check out www.visitScotland.com/about/food-drink

Reduce, Reuse, Recycle - Try to avoid overly packaged goods and say no to that extra carrier bag. Recycle any waste you have. Ask about the recycling facilities available on our buses; our Guides are always happy to assist.

The Haggis “responsible visitor charter” is a document that tells the customer about what the organisation does and gives tips/advice about what you can do as an individual to help save the environment

The charter also advertised/informs to the customer that the company has achieved the Green Tourism silver reward which is one of the best awards an organisation can achieve

HaggisAdventures.co.uk



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How do Haggis Adventures provide sustainable tourism?

Haggis adventures is a great example of an organisation trying to make a difference and provide a service which is good to both communities and the environment. It is no wonder Haggis Adventures was awarded the first tour operator in Scotland to achieve a national green tourism award, Haggis Adventures also support Scottish charities such as the John Muir trust and trees for life.

Environmental charity offering (eco scheme)

As Scotland's first ever organisation to achieve the national green tourism award they are committed to sustainable tourism and preserving Scotland's natural wildlife, environment and unique cultures for future generations to enjoy. They have pioneered an eco-scheme where customers can make an optional £2 donation with their booking, and the company will match every £1 the customer donates, with all proceedings going to two leading Scottish environmental charities, the John Muir trust and trees for life.

Haggis adventures is also in partnership with the TreadRight foundation, which helps encourage the sustainable tourism development by supporting projects that benefit the environment, heritage and community.

The TreadRight foundation is a NON-FOR-PROFIT organisation that has helped more than 35 sustainability projects around the world. Current projects include supporting the national geographic society's inaugural "world legacy awards," wild aid and inspiring wildlife advocates like Terri Irwin



Eco stars award

Haggis adventures have joined the Edinburgh ECOSTARS scheme and have become the first to obtain 5 stars



ECOSTARS is a European-wide voluntary scheme to provide recognition and guidance on environmental best practice to operators of goods vehicles, buses and coaches. The scheme uses a star rating system to grade individual vehicles and recognise operational and environmental performance. It aims to reduce the energy used by all types of transport fleets by encouraging more efficient operations in reducing fuel costs and emissions.

9. Nevis Range



What is it?

Nevis range is Scotland's number one adventure destination, offering a wide range of mountain experiences from snow sports to mountain biking. Nevis range has also gained acknowledgement from "Outdoor capital of the UK". The "outdoor capital of the UK" is a CHARITY run organisation which promotes destinations through activities and collaborative marketing initiatives. The organisation promotes Fort William and Lochaber as the best place in the UK for everyone to experience the outdoors. Nevis Range has also achieved the Green Tourism gold award, which means they are fully sustainable.

Sustainability

Nevis range aims to provide a variety of opportunities which encourage visitors to enjoy the mountain experience in both summer and winter while minimising the impact on the landscape. The mountain of Aonach Mor lies within the various conservation designations such as the Ben Nevis Site of Scientific Interest (SSSI) and the Ben Nevis and Glencoe National Scenic Area (NSA)

As global warming becomes reality the company will/will be affected earlier and more damagingly than most, the organisation provides information on how you can reduce greenhouse gasses and waste



National scenic area (NSA)

The National scenic area (NSA) is a Scottish heritage department run by the government, the department is responsible for protecting Scotland's nature heritage sites. The NAS's cover 13% of Scotland's land area.

Sites of special interest (SSSI)

The sites of special interest (SSSI) is a conservation designation denoting a protected area in the United Kingdom the organisation ensures the protection of the land and water that Scottish Natural Heritage (SNH) considers to best represent our nature. The SSSIs under the Nature Conservation Scotland Act 2004. SSSIs are protected by law. It is an offence for any person to intentionally or recklessly damage the protected natural features of an SSSI. In addition to managing issues which relate to the landscape in which the company operate, such as repairing trampled vegetation, the company is also concerned with more general environmental issues such as waste management and energy conservation.

Each year in addition to business objectives Nevis range has set a number of environmental targets. The targets for 2013/14 are listed below:

- Increase amount of food/organic waste from 3 to 4 tons and reduce waste from plates.
- Continue to reduce unnecessary use of electricity and fuel
- Allow sufficient resource to make improvements as per environmental audit.
- Review carbon management plan and monitor/publish results
- Review project for public recycling
- Publicise environmental achievements

Responsible visitor charter

The Nevis range responsible visitor charter urges visitors to do their part in helping to preserve this special landscape and wider environment by:

- Disposing of litter in bins provided – please help to recycle by separating waste into the appropriate bins plastic/paper/glass/aluminium.
- Walking on the marked trails at the top and please don't build or add to stone cairns – the collection of stones for these is damaging the ground and reducing areas of shelter for invertebrates.
- Not picking wild flowers from the mountain – some are very rare – take a picture instead
Keeping your dog on a lead (so as not to scare wildlife)
- Using the cycle track to arrive by bike, or the dedicated bus service to Nevis Range (from North and South)
- Use our 'Nae butts' portable ashtrays and dog poo bags
- Reduce your carbon footprint – walk and cycle where possible and be active in saving electricity and fuel – it'll save you money as well.

10. Wilderness Scotland



Wilderness Scotland is Europe's No.1 Adventure Travel Company specialising in offering an inspiring range of holidays, journeys and wilderness experiences in the most remote and beautiful regions of the Highlands and Islands of Scotland.

Their Vision:

In choosing Wilderness Scotland you can be sure that you are travelling with a company that takes its commitment to sustainable tourism seriously. They have been dedicated to operating in as sustainable a way as possible since the very beginning of their company and provide financial support to a wide range of nature conservation projects in the Highlands of Scotland.

They continually search for new ways in which they can improve their performance, strengthening their connection to the environments, communities and economies in which they operate. For Wilderness Scotland this connection and responsibility has always been a constant and will continue to be at the very core of their business growth and decision making.

Wilderness Scotland is committed to supporting grass-roots conservation efforts across the country. Their Conservation Contribution Scheme provides financial support to one of Scotland's leading conservation organisations, The John Muir Trust.

Their Conservation Contribution Scheme is straightforward and works in the following way:

A small voluntary payment of £5 per person is added to each of their holidays at the time of booking.

The total of all voluntary payments received each year is shared between the John Muir Trust and Trees for Life to support their invaluable conservation work and campaigning.

In addition to the Conservation Contribution Scheme donations, they also support both of these charities through financial donation and 10 staff days volunteering each year.



11. Growth of Adventure Tourism (Global)

With the release of the 2013 Adventure tourism market study, a consumer research report, in partnership with the adventure travel trade association (ATTA), indicated a staggering growth in the adventure trade sector between 2009 and 2012, a great surprise even to the case study's sponsor

Taken from travel weekly, the president Shannon Stowell from the ATTA, stated "we expect growth – we expect big growth"

It was predicted that several factors had contributed to the 65% year over year growth in the adventure travel market. Firstly, the number of adventure travel suppliers has grown rapidly.

Also when the first study was conducted in 2009, the entire travel industry including the adventure travel market, was in decline due to the downturn of the economy

Another reality of adventure tourism is that it is mainstreaming, noting that adventure travel experiences are increasingly being offered by travel organisations in large numbers, whether it's a hotel with a sky diving program or destinations that have begun marketing their adventure travel possibilities.

By Adventure operators widening their target demographics and product base and with travellers in search of unique experiences all over the globe Adventure Tourism is big business. In terms of performance G Adventures, which achieved a 40% growth for its financial year to July 2014 is an excellent example.

The value of the outbound adventure travel market of the Americas and Europe (regions that make up 70% of the international tourism departments) is estimated to be worth \$263 billion which is a near threefold rise in the three years since the ATTA's previous survey in 2010.

12. Growth of Adventure Tourism in the UK

The 2010 report on AT in Scotland for the Tourism Innovation Group (TIG)⁸ cited the United Kingdom Tourism Survey data, which estimated holiday trips and spend for key sectors. 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)

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. The 2007 Visit Scotland 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 make an economic contribution of £849 million from 3.7 million trips.

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 Visit Scotland figures), also acknowledging the value of walking, cycling, sailing and adventure tourism in many rural areas.

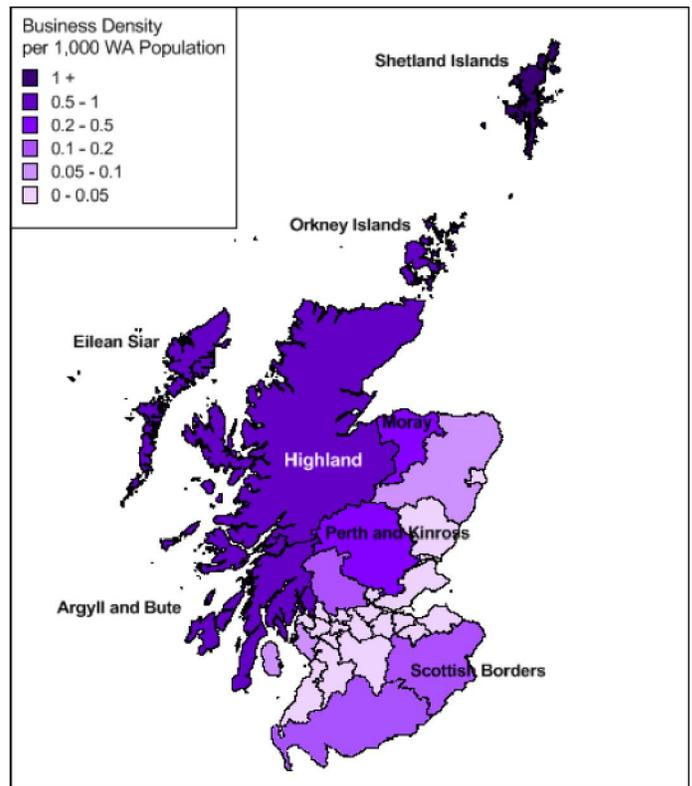
In addition to this, the strategy also sets out three main growth markets forecasted to account for the majority of tourism spend in 2020. These are:

- Domestic – 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 by 2020

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

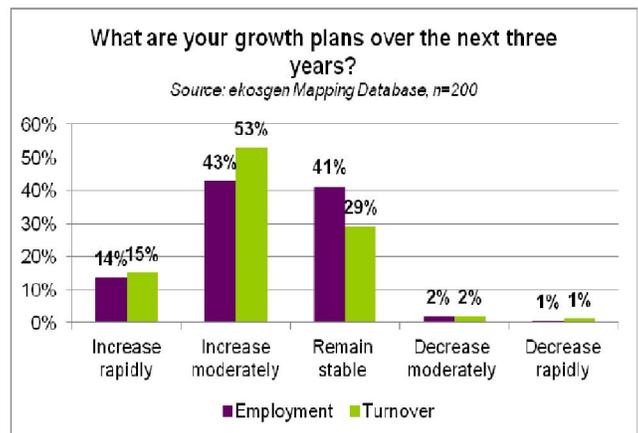
- Visitors from the US, Canada and Australia. These tourists currently spend around £400m, and this has the potential to rise to £500-£600m by 2020.

The highest concentrations of AT businesses are across the Highlands and Islands region. 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.



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.



AT businesses are slightly less optimistic about increasing employment, although over half (57%) do plan to expand employment over the next three years.

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 wide 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/ bush craft, fishing, horse riding/ pony trekking, rafting, paintballing, quad-biking and rope courses.

What is clear is that the Adventure Tourism offer in Scotland is broad and extensive. As shown in Table 4.10 below, the 351 businesses responding identify that many offer 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.

Examples of growing Adventure Tourism companies or locations:

Fort William, as the self-proclaimed Outdoor Capital of the UK, is a natural place to start in terms of geographic clusters of Adventure Tourism businesses in Scotland. Along with Aviemore it is the most recognisable 'outdoor' centre in Scotland, and whilst Aviemore has more Adventure Tourism 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 wide range of outdoor activities it offers is a certain strength, such as climbing, snow sports and mountain biking; and commercialised adventure activities, ranging from sea kayaking and white-water rafting to via ferrata and canyoning. It is also host to a wide range of organised events, of which the Mountain Bike World Cup and Scottish Six Day Trials are the most well-known.

Oban has a relatively accessible location, being on a rail line 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 Adventure Tourism 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.

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 Adventure Tourism 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.

There are clear geographic clusters of activity, some of which are areas popular for Adventure Tourism activities and experiences, others which are destinations with a range of Adventure Tourism 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. 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.

Most popular activities:

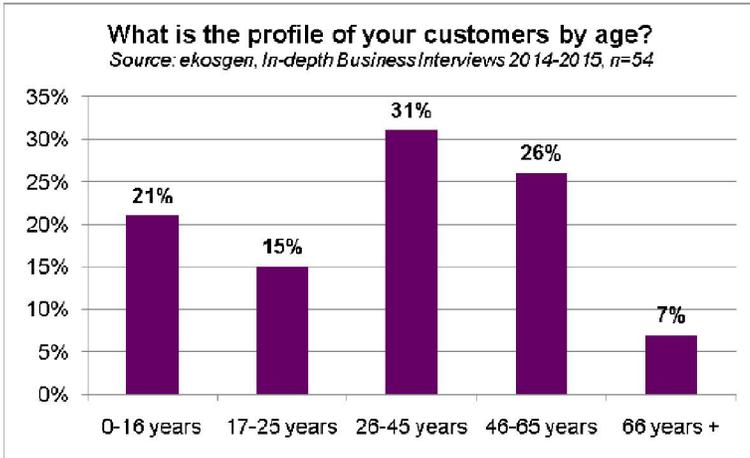
As shown by the table below, the most popularly identified activities/ experiences/ attractions amongst in-depth business respondents are walking, kayaking, biking/ cycling, canoeing, and climbing.

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.

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

Customer profile

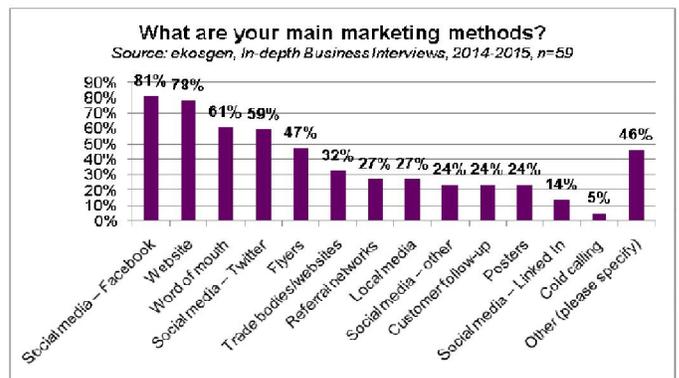
The activity/experience providers and centres plus the attractions stated that about one third of the customers are 25 years and below, another third are in the 26-45 years' gap, and the other third are aged 46 and over.



In terms of customers' gender, the services that are offered tend to be popular with the male audience more than the female, males having a 59% of customers while female having 41% of customers.

13. Technology advance:

Social media is a key marketing method within the industry. Facebook, websites and Twitter were identified as the 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



14. Conclusion of the growth

Scotland is world-class in terms of the framework 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.

Range of 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 image 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 breath-taking 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 fans.

Conclusion of growth in the UK

- Adventure tourism is an important and growing element of the domestic tourism market in the UK, particularly in Scotland and Wales but also in many English destinations such as the Lake District, Peak District, Yorkshire, the South West and South Coast. At least 10% of UK holidays currently involves some form of participation in adventure activities, and adventure holidays now account for something like 4% of all domestic holidays taken in the UK.
- Water sports holidays are far more seasonally concentrated than holidays in general, with a sharp summer peak. Climbing and adrenaline sports are much less seasonally peaked, though with an above average proportion of winter visits.
- Hill walking, non-motorised water sports (in particular canoeing, surfing, windsurfing and dinghy sailing), climbing and mountain biking are currently the most popular types of adventure activity in the UK. Other types of adventure activity (caving, motorised water sports, motorised land sports, diving, air-sports, and other land-based activities) appear more as niche products.
- Activity operators in adventure tourism in the UK cater primarily for groups, as it is perceived as not convenient running courses/activities for very small numbers. Adventure holiday takers are more likely to stay in commercial accommodation than UK holiday visitors in general, with a preference for self-catering accommodation and camping.

UK adventure tourism has experienced steady growth over the past ten years, particularly given facilities and infrastructures development, improved access arrangements, more aggressive marketing and information provision. This tourism product is recognised a significant potential and – notably in certain UK areas – an inner capacity to counteract seasonality and attract winter tourism. The UK is aware that effort needs to continue on enhancing access and quality of services provided by supporting business and working on accreditation of operators while investing in marketing.

For the UK to compete in an international arena it is essential that the industry continues to work cohesively to ensure the growth of Adventure Tourism so that the UK can benefit from this high value, high growth ,sustainable tourism market.

15. Teacher's Guidance

Introduction

This teacher's guide is based upon the case study of Sustainable Adventure Tourism in the UK. It contains resources that will help learners in the understanding of Adventure Tourism which is a recently introduced topic of study and now included as a unit within many of the UK Level 3 Travel and Tourism qualifications which demonstrates the importance of this sector.

One of the main reasons for this is due to the phenomenal growth of this sector of tourism.

According to the 'Adventure Travel Trade Association' 2013 report an estimation of the value of the global outbound adventure travel sector is USD 263 billion (this excludes airfares) this is an increase from USD 89 billion since 2009, representing an annual growth of 65%. An additional USD 82 billion is also spent on related gear making spend more than USD345 billion.

Hence why we have seen a growth in Adventure Tour Operators and new Adventure Tourism destinations. The UK is developing itself as an adventure tourism destination, the key areas for this growth has been in regions such as Wales and Scotland. With the growth of Adventure Tourism these areas have considered the respect and protection of the local environment and communities. Examples of how organisations have achieved this has been evidenced in the case study.

Suggested content of Lessons

- Understand the adventure tourism industry and its markets
- Understand the UK Adventure tourism experience
- Understand sustainability in the development of adventure tourism in the region
- Identify the socio-demographics of the adventure traveller

Suggested learning activities to apply to the case study:

Pairs/Small group work: Have a discussion in order to agree on a definition of 'Adventure Tourism' and 'Sustainability'.

Each group are to consider the reasons for the huge growth in the Adventure Tourism market. **Points for consideration** – Global and Regional growth.

Classroom discussion

Types of Adventure Tourism activities – Soft/Hard Adventure Tourism, which activities fall within each category?

What are the main adventure tourism activities available within the UK?

Socio-demographics of the Adventure Traveller

Group research project:

Each group is to choose one organisation from the list below and conduct research about its sustainable policies. Each group is to prepare a visual display to share their findings with the other learners.

Organisations

www.zipworld.co.uk

www.surfsnowdonia.co.uk

www.wild-scotland.org

www.macsadventure.com

www.cyclewildscotland.co.uk

Questions to consider:

1. Who should be in control of sustainability?
2. What are the problems, if any, of having a sustainable product?
3. Are there any additional costs for a sustainable organisation?

References

Adventure Travel Trade Association

www.adventuretravel.biz

Green Tourism

www.greentourism.com

Go Ape

www.goape.co.uk

Haggis Adventures

<http://www.haggisadventures.com/essential-info/sustainable-tourism/>

Highlands and Islands Enterprise - Adventure Tourism in Scotland- Research report August 2015

National Parks

http://www.nationalparks.gov.uk/learningabout/ourchallenges/tourism/beasustainable_tourist

<http://www.nationalparksengland.org.uk/home/policy/sustainable-tourism-and-recreation>

<http://www.nationalparksengland.org.uk/home/policy/sustainable-tourism-and-recreation>

http://www.nationalparkswales.gov.uk/_data/assets/pdf_file/0020/352505/sustainable_tourism_position_statement.pdf

Nevis Range

www.nevisrange.co.uk

Skift Global Tourism

VisitScotland

<http://www.visitscotland.org/pdf/VisitScotland-Sustainable-Tourism-Strategy-Consultation-May%202010.pdf>

Wild Scotland

<http://www.wild-scotland.org.uk/>

<http://www.wild-scotland.org.uk/2011/12/adventure-tourism-is-high-value-high-growth-sustainable-tourism/>

Wilderness Scotland

www.wildernessscotland.com