

**Activity Tourism:
From Strategy to Delivery**

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of the
Countryside Recreation Network

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

WELCOME AND INTRODUCTION

Steve Webb
Wales Tourist Board

Present day leisure patterns are changing rapidly. Consumers lead increasingly busy lives, both at work and in their 'free time'. Because of this, they seek opportunities to maximise the way in which they spend their time. This manifests itself as a desire to save time, or as a wish to get more from the time they put into an activity. Time-squeeze means that getting away for shorter amounts of time can be easier to plan and short-breaks, including day trips, are taking an increasing share of the UK holiday market. As breaks have got shorter, they have also increased in number and over 15 million people from the UK took two or more holidays last year.

As the UK population becomes more affluent, more and more people are seeking fulfilment through spending on leisure experiences and lifestyle choices. An area of the leisure and experience economy where consumers have been spending in particular is that of 'well-being'. For an increasing number of people, 'health' no longer refers simply to an absence of an illness – it now embraces feelings about mind, body, spirituality, environment and relationships. As a result, consumers are seeking 'experiences' during their leisure time which can help refresh mind, body and spirit.

In this context, activity tourism is an important and growing element of the UK domestic tourism market. Statistics show that seven in every ten holidays involve participation in an outdoor activity and for more than 10% of holidays; participation in a specific activity is the main motivation for the trip. The most popular activity for UK holidaymakers is walking but participation is also growing in cycling, horse-riding, fishing, watersports, mountaineering and in adventure based adrenaline sports. Activity Tourism or active recreation can no longer be termed a niche area of interest. It is important at a national and more local, community level, not only because of the health benefits that it bestows upon participants but because of its significant economic level.

At a national level, the expenditure related to walking in the countryside is estimated to be worth in the region of £7 billion annually. The income derived from this spending is further estimated to support over 250,000 jobs. At a local level the positive impacts of Activity Tourism can be even more significant. For example, recent research conducted in Snowdonia in North Wales indicated that the contribution to the economy of adventure-related activities was £140 million – spending which supported 8000 jobs in the local economy.

Prospects for future growth in Activity Tourism and active recreation are promising. Economic and demographic trends are moving in the right direction and although, in overall terms, the UK population is ageing, paradoxically we are all becoming more active in our old age, seeking opportunities for self-fulfilment which are new, enjoyable, environmentally-

friendly and 'experiential'. There will also be a forecast growth of 7% in the 18-30 year old age range between 2005 – 2010, a prime target market for the more extreme types of Activity Tourism.

Although there is growing interest in activity pursuits, which by their very nature, often take place in the countryside, careful planning and land management will be required to ensure that these growth opportunities are sustainable over a prolonged timescale.

This workshop had the following aims:-

- ♦ To provide an overview of the importance of activity tourism and its contribution to the economic and social prosperity of local communities;
- ♦ To share experiences of organisations involved in setting and delivering evidence-based policy and strategy for the activity tourism sector;
- ♦ To learn from organisations and practitioners who have been involved in the development and promotion of activity tourism products and destinations.

Conclusions drawn from the day included confirmation that activity tourism is of growing importance to many local communities and countryside areas. It is a big business which is supporting significant numbers of micro-businesses, often in a discrete way. Activity tourism may not be the dominant economic force in any area, but when planned carefully in an inclusive way, it can be an important stimulus for pro-active community involvement. It also fits well with other informal countryside activities and more general conservation matters which can help safeguard local environments and cultural distinctiveness.

In summary, the main insights drawn from the day's presentations and the Q and A sessions emphasised the importance of Planning, Priorities, Partnership, Personalities.

- ♦ **Planning:** common to all types of countryside recreation management, it is important to understand the characteristics and needs of user groups. Jon Munro and Jim Embrey emphasised the need to undertake market research which can form the foundation for future plans, policies and strategies. Professor Neil Ravenscroft provided useful insight into research which documented trends in activity sports participation but highlighted the fact that research evidence is still patchy and more research will be needed to establish a full and dynamic understanding of the market.
- ♦ **Priorities:** Matt Peach and others emphasised the need for strategies to be action based and focussed on priorities. Plans needed to be project specific – a point that Jon and Jim also stressed in order to concentrate limited resources towards a carefully planned programme of initiatives. Priority projects can stimulate the 'quick wins' that are so important in generating confidence among key stakeholder groups.
- ♦ **Partnerships:** Not one organisation, business or individual has the capacity, skills or resources to do everything in isolation. Developing effective working relationships or partnerships with shared goals was a key message from Tristram Mayhew whose Go Ape!, forest-based activity and educational

centres have been established in partnership with the Forestry Commission to appeal to 'kids of all ages'. It is important, at the earliest stage in partnership development, to agree common goals, objectives and to define shared values if the opportunities arising from private and public sector partnerships are to be realised in full.

- ◆ **Personalities:** The importance of inclusive community involvement and support was highlighted by Yvonne Crook, who described the destination marketing and management approach adopted by Aviemore ('The Natural Adventure') and by Anna Trafford who described the process of community engagement which has taken place in Fort William – The Outdoor Capital. In both cases, the existence of key local personalities was a crucial factor in driving forward active engagement with the community. Although such people were critically important during the formulation of strategies, partnerships and action plans, both Yvonne and Anna reported that it was not always easy to sustain progress if key personalities become disengaged with the process – an outcome that can be all too familiar to community led projects. There was a need, therefore, while acknowledging the role of individuals who can act as a driving force for community involvement, to recognise the importance of building teamwork approaches which can be sustained over prolonged timescales.

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

**DEVELOPING STRATEGY, MARKET FOCUS, PARTNERSHIP DELIVERY
IN PRODUCT DEVELOPMENT**

Jon Munro and Jim Embrey
Wales Tourist Board

The Wales Tourist Board (WTB) is charged with 'improving the economic and social prosperity of Wales through the effective marketing and development of tourism'. Work associated with the activity tourism products; Walking, Adventure, Cycling (including Mountain Biking) and Fishing is managed by two small teams – one focussed on development and the other on marketing campaigns. This paper will outline the process of this initiative, and discuss marketing aspects and development issues in some detail, with a view to proving that a customer-focused, strategic approach works.

The fundamental concept of the entire Welsh Activity Tourism initiative is that a coordinated approach to marketing and development for each of the activity tourism products – over a 7-10 year period – is essential. On the development side strategies are based on a sustainable partnership approach. On the marketing side they help us understand, at a Wales level, how we can ultimately sell more holidays through;

- Raising the profile of Wales as an activity destination.
- Generating requests for further information – print and online.
- Providing quality enquiries for individual businesses.
- Building a relationship between Wales and it's holiday customers.

The WTB activity tourism initiative began in 1996 with an offer to Welsh tourism businesses to advertise in six new activity tourism brochures. The programme was an adjunct to the main destination-driven campaigns, without clear focus and with no dedicated resource. In 1999, 'Achieving Our Potential,' the new 10 year strategy for tourism in Wales, called for a new enhanced approach for the activity tourism initiative. Accordingly, expert outside consultants were called in to create a cycling tourism strategy, 'Moving Up a Gear,' which on publication met with widespread industry approval.

The success of the strategy led to a decision to undertake a similar process across the suite of activities. The vision was to create product marketing and development plans that for the first time were led by focussed market research and an associated planning process. WTB needed to understand the following;

- The potential Value and Volume of each product – leading to development priorities.
- Types and requirements of visitors – leading to market segmentation.
- Our competitive strengths – allowing us to address different demographics and overcome preconceptions.
- How to roll out targeted and effective marketing campaigns.
- How to coordinate strategic development avoiding potential inefficient business displacement.

Most important of all, the strategies led to concrete action plans, creating a series of ongoing projects for both development and marketing.

In terms of the value of activities, the main tool available, UK Tourism Survey (UKTS) proved to be an imprecise instrument, in that it gave pan-Wales data only. Additionally, it often counted the complete value of holidays twice, when those surveyed indicated an interest in more than one activity. Therefore the macro-economic values produced need to be regarded with some scepticism. Nevertheless, for the first time, it allowed some measurement of those who participate in activities whilst on holiday as well as the more easily counted people who take activity holidays. It proved to be a very efficient way of understanding the relative importance of the activities, with the value of walking being measured as some thirty times larger than horse-riding, thus providing a clear view of where priorities needed to lie.

Figure1: Value of Activity Tourism to Wales 2002-2010

Product	Value 2002 (£millions)	Potential (2010)	Cumulative Growth (%)	Annual Growth(%)
Walking Tourism	550	700	27	3.5
Watersports Tourism	160	225	40	5.0
Adventure Tourism	133	220	65	7.4
Cycling Tourism	103	172	67	7.6
Fishing Tourism	76	115	51	6.0
Horse-riding Tourism	18	27	50	6.0

In terms of development, the strategies made it clear that WTB has an important co-ordination role but due to lack of financial resource cannot be the main implementation body. Additionally, statutory responsibility, for example for rights-of-way, often rests with Local Authorities and National Park Authorities. Therefore the role of WTB can best be described as being 'ambassadorial'; influencing, informing, coordinating, relationship and partnership building.

This approach was significantly advanced by the ADFYWIO grant scheme established by Welsh Assembly Government in 2001 as part of its Foot and Mouth fight-back plan. £5.2 million was ring-fenced to be allocated to public, private, and voluntary sector bodies for projects that linked tourism, leisure and the environment. The scheme was jointly administered by the Countryside Council for Wales (CCW) and WTB. Over the 18 months that it took for the monies to be fully committed 70% of the 200 projects that emerged directly supported the new strategies, thus advancing the entire initiative with stakeholders across Wales far faster than would otherwise have been possible.

Where marketing activity is concerned, perhaps most importantly, the product strategies help the marketing team understand what they are trying to do and how they might achieve it through appropriately targeted marketing campaigns. Beyond this the team have developed a very clear process to ensure they deliver the right campaign on time and on budget;

- The product is defined based on a clear understanding of the target market – and an appreciation of what their needs and wants are.

- The campaigns are based on a clear approach to segmentation.
- The external team (from marketing agencies to magazine editors) is built based on a 'working with experts' approach. For example, each of the products as an associated Managing Editor typically sourced via relevant specialist press titles.
- The internal (WTB) team provide two clear functions – the communications planning and the associated project management required to deliver the campaigns.
- A thorough approach to evaluation and monitoring – to provide appropriate corporate reporting as well as more real time campaign analysis that can be used to make media decisions on a campaign basis.

Currently WTB run three campaign cycles; New Year, early Summer and Autumn. This covers both 'niche' campaigns and coordination with the main consumer campaigns – such as the 'Big Country' campaign in the UK. The niche campaigns focus on direct response activity – including press space and inserts, direct mail (both to our own database and via bought in cold lists) and online (paid for search and advertising). The campaigns currently focus on customer acquisition and are designed specifically to generate requests for a range of brochures and drive traffic to associated websites. WTB work with a range of partners, primarily the four key regions in Wales and the twelve marketing areas; to help fund the activity and generate specific requests for their information and products. The response campaigns are supported by an exhibition programme and an associated brand alliance programme – based on working with outdoor brands such as manufacturers and high street retailers. During 2004 (where total spend on niche activity was circa. £1.3 million) WTB achieved the following;

- Qualified requests for magazines – 102,657 (against a target of 100,000)
- Additional online traffic – e.g. mbwales.com ~12.5K unique users per month
- Total value associated with these customers - £100.3 million
- Total additional value generated - £40.9 million (against a target of £40 million)
- £64.8 million taking into account activity expenditure

An assessment of the WTB activity tourism initiative to date shows that there have been clear wins: In terms of marketing new customers are being attracted to Wales. On the development side there are new leisure and mountain biking centres, new 'Town and Village' walking destinations, effective activity tourism business networks, and increased watersports and horse-riding marketing. Cumulatively the initiative has significantly repositioned Wales as a tourism destination within the UK and abroad.

The initiative has also dealt with major issues and learned some lessons. Because historically access to countryside in Britain is free, the issue of adequate resource for infrastructure continues to be a problem. It is quite often easy to build something new (capital), difficult to maintain it (revenue). WTB has looked at what works elsewhere, in skiing and golf, for example, as models that could suggest solutions. The future source of resource in terms of the public-sector may well be through health initiatives.

In order for the initiative to have long term success, it must be truly sustainable, respecting communities, the environment and balancing the needs of economic development against any footprint that may result. The needs of partners working to different agendas and timelines must be respected, and the goal of consistent pan-Wales local delivery will need to be achieved over time. An ongoing concern is that currently jobs created often go to outsiders due to lack of exposure of local children to activity tourism.

Lastly, there is a danger of activity sectors becoming 'flavor of the month' with partners, resulting in over-provision, duplication, and loss of overall strategic direction. In the past this almost occurred with mountain biking and currently there is a risk of it occurring with watersports. The solution is not easy, but lies in good communication and a clear understanding of roles within the national framework.

One of the key reasons for WTB's success has been the clear and focussed action plans that were developed based on the product strategies – these served as a 'To Do List' for WTB and their partners. WTB has now developed an action plan for the period 2005-7 which covers a number of projects, both cross-cutting projects and specific projects associated to the delivery of each of the individual product plans. The action plan is being used to measure progress against defined outcomes and report this to key partners and the industry. A 'growth' element of the action plan has also been used to bid for additional resources at a national level. It is the strategic project-based approach that has been the key to obtaining modest resource support from Welsh Assembly Government, support that would not have been available prior to devolution, and with this Wales has moved, and hopefully will continue to move, more quickly than some competing destinations, thereby enabling it to achieve its ambition of becoming the activity tourism centre of the United Kingdom.

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

RESEARCH INTO ACTIVITY RECREATION

*Neil Ravenscroft
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Introduction: researching emerging trends in activity recreation

The growth and significance of lifestyle sports

Over the past 20 years there has been a proliferation of new sporting forms that have presented 'alternatives', and potential challenges to traditional ways of conceptualising and practising sport (Midol & Broyer, 1995; Rinehart, 1998; Wheaton, 2000). Examples of such activities are those sports that have been variously termed 'activity' 'action', 'new', 'whiz', 'extreme' and 'lifestyle' sports (recognising that these labels have different meanings to different people). The labels take account of a wide range of mostly individualised activities, from established practices like climbing, surfing and skateboarding, to new activities like wake boarding, B.A.S.E. jumping and kite surfing (see Figure 1).

Figure 1 *Categorisation of Lifestyle Sports*

Family	Species	Mutants
Climbing	<ul style="list-style-type: none"> ✓ High-altitude mountaineering; ✓ Solo climbing ✓ Ice climbing ✓ Indoor climbing ✓ Rock climbing ✓ Sport climbing ✓ Abseiling ✓ Bouldering ✓ Sea-level traversing ✓ Coasteering 	<ul style="list-style-type: none"> ➤ BASE (buildings, antenna tower, span, earth) Jumping ➤ Extreme ironing
Caving	<ul style="list-style-type: none"> ✓ Pot-holing ✓ Mine exploration 	
Motorised watersports	<ul style="list-style-type: none"> ✓ Water-skiing ✓ Ribbing ✓ Wakeboarding ✓ Jet skiing ✓ Powerboat racing 	<ul style="list-style-type: none"> ➤ Barefoot waterski jumping
Wind-powered watersports	<ul style="list-style-type: none"> ✓ Windsurfing ✓ Dinghy sailing ✓ Cruiser sailing ✓ Yachting 	<ul style="list-style-type: none"> ✓ Speed sailing ✓ Endurance sailing ✓ Trifoiling ✓ Ocean yacht racing ✓ Kitesurfing
Wave/ water-powered watersports	<ul style="list-style-type: none"> ✓ Body boarding ✓ Surfing ✓ Rafting 	
Muscle-powered watersports	<ul style="list-style-type: none"> ✓ Canoeing ✓ Kayaking ✓ Dragon boating 	<ul style="list-style-type: none"> ✓ Canoe polo ✓ Play canoeing ✓ Whitewater kayaking ✓ Open water swimming ✓ Deep water swimming ✓ Snorkelling ✓ Underwater hockey
Diving	<ul style="list-style-type: none"> ✓ SCUBA diving ✓ Free diving ✓ Deep water diving 	
Motorised land sports	<ul style="list-style-type: none"> ✓ 4x4 driving ✓ Enduro biking ✓ Motocross ✓ Rally driving ✓ Quad biking 	
Non-motorised land sports	<ul style="list-style-type: none"> ✓ Skateboarding ✓ Snowboarding ✓ Land yachting ✓ Street luge ✓ Rollerblading/ in-line skating 	<ul style="list-style-type: none"> ✓ Ice yachting ✓ Ice sailing ✓ Mountainboarding ✓ Sandboarding ✓ Speed skiing ✓ Barefoot snowskiing ✓ Parachute skiing ✓ Mono skiing ✓ Extreme skiing
Air sports	<ul style="list-style-type: none"> ✓ Hang-gliding ✓ Parachuting ✓ Microlighting ✓ Gliding ✓ Paragliding 	<ul style="list-style-type: none"> ✓ High wire ✓ Ski flying ✓ Soaring ✓ Air chair ✓ Para bungee ✓ Heli-bungee ✓ Hot air balloon epics
Cycling	<ul style="list-style-type: none"> ✓ Trail riding ✓ Downhill riding ✓ BMX 	<ul style="list-style-type: none"> ✓ Speed biking ✓ Bicycle polo ✓ Bicycle stunt
Other land-based activities	<ul style="list-style-type: none"> ✓ Orienteering ✓ Gorge walking ✓ Canyoning ✓ Bungee jumping ✓ Rope courses ✓ Parakarting 	<ul style="list-style-type: none"> ✓ Ultra marathoning ✓ Ultimate fighting

(Keeling, 2003; Rinehart, 2000; Anderson, 1996)

Underpinning all forms of lifestyle sport are lived cultures that are fundamentally about 'doing it': about taking part. Participation takes place in spaces that often lack regulation and control. The sports tend to have a participatory ideology that promotes fun, hedonism, involvement, self actualisation, living for the moment, adrenalin and other intrinsic rewards. They often denounce, and in some cases even resist, institutionalisation, regulation and commercialisation, and tend to have an ambiguous – if not paradoxical¹ – relationship with forms of traditional competition.

While each lifestyle sport has its own specificity, its own history, identity and development pattern, all share a common ethos *distinct* from that of traditional sport. In these sporting cultures, the main emphasis is on 'grass roots' participation; individuals invest a high degree of commitment in time and money. They identify themselves through recognisable styles, expressions and attitudes that develop in and around the activity. In practical terms, these activities represent avenues for sporting participation and social engagement for many of those who have been alienated by traditional school-based and institutional sport practices (Wheaton, 1997; 2000; 2004).

Lifestyle sports tourism

The linkages between activity recreation and sports tourism are strong, with both practices being built around expressions of individual and collective lifestyles. In addition to the annual (or more frequent) skiing holidays, people now routinely take domestic and overseas breaks to participate in sports activities and events. At one end of the spectrum this involves mountaineering, diving, canoeing and other types of clubs going for club weekends to specific venues, and individuals making their way to favoured sporting locales. At the other, it involves individuals travelling to participate in major events such as signature marathons, exclusive sports activities such as heli-kayaking and endurance activities such as climbing 8000 metre peaks. Between these extremes are what Gibson (1998) refers to as 'active sports tourists' – well-off people travelling to play golf, or to combine sport with other forms of leisure, such as spas and health clubs. This middle segment currently dominates the sport tourism market (Gibson, 1998, suggests that such sports participants may comprise as much as one-third of all domestic air travel in the USA).

- *Lifestyle sports participation also comprises a significant element of the UK activity holiday market. For example, in the University of Brighton Consortium (2001) report on water recreation, many interviewees commented that they only undertook watersports when on holiday, principally because of the better weather, the availability of equipment and tuition and a general impression that many British waters are polluted. A number of reports (Intel, 2003a; Key Note, 2004a) note a growth in the outbound package holiday market, driven by the development of niche consumer products that incorporate, or offer as a specialist interest, the chance to participate in lifestyle sports.*

¹ Windsurfing, for example, is an Olympic sport, yet only a very small minority of participants use the type of craft sailed in the Olympic competitions. The Olympics is not considered the pinnacle of the sport by most participants. The types of 'funboard' competition presided over by the Professional Windsurfing Association, including slalom, freestyle and waves is more popular with spectators, although still has a low take up among participants.

- *With respect to domestic activity holidays, between 1996 and 2001 1.9 million adults in Great Britain took an activity-based holiday. However, this statistic includes fishing alongside pursuits such as diving, rock climbing, motor and air sports. A further 2.1 million people took multi-activity holidays that offered a range of sporting experiences (Key Note, 2001, p.24). These activities are, however, undertaken by too few participants to permit any detailed analysis of consumer behaviour. Martin and Mason (1993) estimated that 47% of adult activity holidays are based on sports participation and that 8% are based on watersports.*

It is important, however, to differentiate between two broad types of activity experience: 'soft' and 'hard' adventure. According to Mintel (2003b) 'hard adventure' involves activities with "high levels of risk that require intense commitment and a high level of skill from the traveller. This type of adventure travel is likely to appeal to travellers who search for an 'adrenaline rush' and thrive on an element of challenge, danger and risk both from the activity that they are undertaking and from the conditions under which they are travelling". Included under this category are activities such as abseiling, caving, canyoning, mountaineering, wilderness survival, white water rafting and sky diving.

'Soft adventure' – Gibson's activity tourism - involves activities where the perception of risk outweighs the real risk involved. The traveller tends to be a novice or dabbler with little to no previous experience. The element of self-discovery or escape features here, but higher levels of comfort are involved than with 'hard adventure'. Included here are activities such as diving, walking and trekking, cycling, sailing and, of course, activities such as golf.

The size of the European adventure travel market is estimated as around 200,000 trips for independent adventure travel and 245,000 for package adventure holidays. This accounts for a total of 0.1% of all tourist trips in Europe. Great Britain accounts for 16% of this market, with 71,000 adventure travel trips to Europe (Mintel, 2003b). Mintel (2003a) estimates that activity holidays involving extreme sports account for between 8% and 15% of the domestic activity holiday market, and between 15% and 22% of overseas activity holiday market. It is further estimated that the value of the domestic extreme sports holiday market is about £300 million, with the overseas market, involving Britons, worth around £400 million in 2001.

Where, once, sports such as scuba diving, mountain biking, BMX and surfing were amateur activities to be engaged in on holiday, there is increasingly a trend towards full-time engagement in these sports, certainly for a small but growing minority of participants. Without the sustained impact of television, most of these semi-professionals survive on sponsorship from the clothing and equipment manufacturers and coaching fees from the increasing number of amateurs or 'hobbyists' seeking to learn new sports. There is also some money to be won in competitions, although these often bear more resemblance to demonstration events (with appearance fees) than competitions with prizes. For such participants, tourism becomes integral to their lifestyle and their sport; they locate where the best facilities (and earning potential) are, and move according to the conditions, seasons or other factors while maintaining the centrality of their sport and associated lifestyle.

Understanding Lifestyle Activities

Life 'style' sport, consumption and choice

There is a long-established recognition that the concept of lifestyle challenges any over-determining notion of class, by suggesting that social hierarchies and divisions could be based upon status as much as economic categories of class. In his work on lifestyles, Chaney (1996) suggests that the emphasis on lifestyle has led to new forms of social identity which consist of:

- i) *Choices* – people themselves identifying the attitudes values and tastes that are significant to them;
- ii) *A Cultural, consumption or leisure* base to these choices; and
- iii) *Patterns, affiliations or sensibilities* that characterise these personal choices.

Thus, lifestyle is used here as a broad umbrella term referring to various aspects of identity and identification with sport(s). In contemporary terms, participation in lifestyle sports is "about living life through your sport. The sport and its associated lifestyle define who you are, introduce you to a set of like-minded people and give you exclusive membership of a fashionable youth sub-culture" (Intel, 2003a). For Intel (2001), meaning lies in the connections that people make between themselves, the activities and the environments in which they participate:

Ask any extreme sports participant and they will tell you that their sport is more than just a sport – it's a state of mind and a way of life. Its about challenge, adventure and pushing the boundaries. Sometimes it involves competing against others, more often it involves challenging your own limitations and pushing them to the max. Its about meeting and sharing your enthusiasm for your sport with a like-minded group of people and its about fun, challenge and excitement.

Despite differences in nomenclature, many commentators are agreed in seeing such activities as having presented an 'alternative', and *potential* challenge to traditional ways of 'seeing' 'doing' and understanding sport (Rinehart 1998; Wheaton 2000; Midol and Broyer 1995). What emerges are three central concepts:

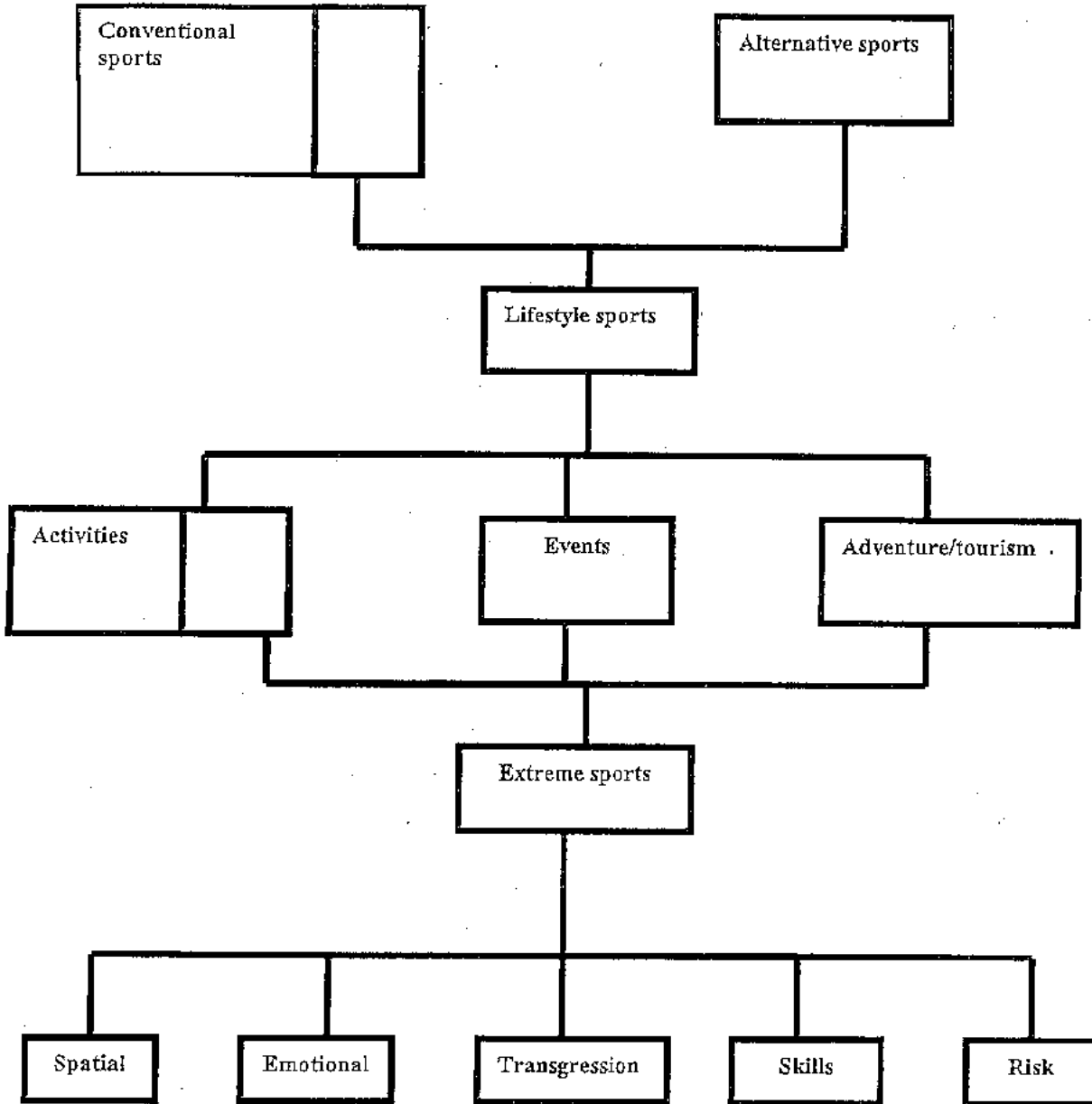
- 'alternative' (practiced in different ways to conventional sports and incorporating descriptions such as 'new', 'post modern' and 'post industrial');
- 'lifestyle' (meanings related to personal factors beyond success in competition – although not denying that competition can be an element of the practice of lifestyle sports, and incorporating descriptions such as 'action', 'wizz' and 'panic' sports);
- 'extreme' (a label given to some aspects of practice associated with risk-taking; also associations with branding and commodifying some aspects of practice);

The first of these descriptors refers to the institutional structures in which participation takes place. These are contrasted with the conventional regulation of sport, although it is

recognised that the boundary between these two constructs is far from certain. The second and third concepts refer to the practice elements of the sports, with 'lifestyle' denoting a broad taxonomy of practices, many of which can be (or are) practiced in an extreme way. As Figure 2 illustrates, lifestyle sports consist of all alternative and some conventional sporting practices, the latter comprising conventional activities that have been reinterpreted as lifestyle practices (the reinterpretation of Olympic sports, for example). Lifestyle sport itself is divided into three core areas: general activities, events and adventure tourism, all of which can be practiced as extreme sports (note here that the activities category is sub-divided since not all lifestyle sport activities are necessarily extreme – this may equally be the case for events and adventure tourism, but is not illustrated in Figure 2).

At the bottom of Figure 2 it is indicated that extreme sports can be understood from five distinct (but not mutually exclusive) categories: spatial locations; emotional responses; transgression; skill requirements; and danger/risk. Each of these has a direct application to tourism. Spatially, of course, many lifestyle activities require specific locations or physical conditions that can only be accessed through travel – and require much of the conventional tourism infrastructure if they are to be opened up or exploited. As many authors have identified, opening sites for sports activities (or running sports events) demands increasing attention to the safety of participants, and to matching their skills with the physical requirements of the site (see, for example, Creyer, et al, 2003; Olivier, 2006). Tourism ventures must thus attempt to balance participant's emotional approach to lifestyle sports with their skills levels and the dangers involved in participation.

Figure 2 Lifestyle Sports



With this emphasis on the participants rather than the sports, there is clearly a need to develop a cognitive structure within which they can be understood. The work on serious leisure, by Bob Stebbins (1992, 1997), offers one approach that has relevance to policy formulation. Stebbins' categorisations of serious leisure participants are particularly useful for unpacking the levels and meanings of identification with the activity. 'Serious leisure' is defined as:

"the systematic pursuit of an amateur, hobbyist, or volunteer activity that is sufficiently substantial and interesting for the participant to find a career there in the acquisition and expression of its special skills and knowledge" (1992, p.3).

Serious leisure therefore has a work-like character, involves the acquisition of skills, training and specialist knowledge and conveys a sense of deep immersion into the activity. Stebbins (1992) expands this definition to take account of six qualities.

1. *the occasional need to persevere* – the notion of sticking with the activity through thick and thin, overcoming short-term obstacles and constraints, and conquering both internal and external adversaries
2. *tendency toward careerism* – where individuals gain a sense of achievement within the activity, are able to construct the activity as part of a personal narrative of success (or failure) and they may earn a small living from their participation
3. *significant personal effort based on specially acquired knowledge, training, or skill* – the idea that the ends of the sport can be achieved through discernible forms of training or education in the requirements of the activity, which tend to be gained through self-directed learning
4. *durable benefits* – which Stebbins lists as self-actualisation, self-enrichment, self-expression, recreation or renewal of self, feelings of accomplishment, enhancement of self-image, social interaction and belongingness, and lasting physical products of the activity
5. *the development of a unique ethos* – or subculture around the activity. Participants construct a distinct 'lifeworld' and recognise its beliefs, norms, values, events, traditions, moral principles, and performance standards
6. *strong identification with the chosen pursuit* – "They are inclined to speak proudly, excitedly, and frequently about them to other people, and to present themselves in terms of these pursuits when conversing with new acquaintances." One can also speak of a deep immersion into the activity where the participant sees the world through the 'lenses' of the activity.

These elements help differentiate the types of participant that might be labelled as lifestyle sports enthusiasts.

Participation Data

The principal source of information on participation is the Mintel market intelligence series (Mintel, 2001, 2003a), which deals with what it terms 'extreme sports', but which actually reflects a relatively narrow interpretation of lifestyle sports. As such, the data must be treated as an indication of the likely position with regard to participation. The key findings from the Mintel series are that most participation occurs in the 15-24 age group, with decreasing interest after this age. The most popular sports for the 15-24 age group are snowboarding and BMX/mountain biking, while many also claim an interest in extreme sports in general (recognising here that the label 'extreme' is likely to be conditional on the knowledge and experience of each individual).

Youth participation

In a survey of 11-14 year-olds it was found that rollerblading and skateboarding were the highest in terms of participation, for both genders, with just under one in five taking part in mountain biking. In terms of gender, both boys and girls were similarly placed in terms of participation in mountain climbing, whilst the other sports, except rollerblading, showed a uniformly higher interest for boys (Figure 3).

Figure 3: Extreme sports that 11-14 year-olds participated in, by gender, 2003

	Male (%)	Female (%)	Total (%)
Mountain biking	22.7	13.3	18.1
Snowboarding	8.1	4.0	6.1
Mountain climbing	10.6	9.3	10.0
Skateboarding	27.5	13.8	20.8
Rollerblading	21.7	31.7	26.6

Taken from TGI Youth survey of 5,859 youths aged 7-19 years
(Source: Mintel, 2003a)

Adult participation

Over 65% of adults have undertaken at least one lifestyle activity at least once during a 12 month period. However, this drops to below 15% of the sample for those who participate at least three times per week in one or more lifestyle sports. Allowing for inconsistent data, the trends indicate that regular participation - in the sports for which there are data - doubled between 2001 and 2003, from the equivalent of 2.5% to 5% of the adult population (the data measures units of participation in each sport, not the number of participants overall, meaning that the total number of participants is likely to be less than 5% of the adult population, due to some participants doing more than one sport). In contrast, occasional participation changed very little over the same period (see Figure 4). It is not clear why this should be the case, nor whether the doubling of regular participation represents a shift from occasional to regular participation, or new regular participants taking up the sports.

Figure 4: Penetration of popular sports and fitness activities (% of adults), 2001 and 2003

	2001 regular	2001 occasional	2001 total	2003 regular	2003 occasional	2003 Total
Outdoor pursuits						
Mountain biking	0.7	1.9	2.6	1.3	2.0	3.3
Climbing or mountaineering	0.5	2.0	2.5	1.0	2.1	3.1
Roller skating/blading	0.4	1.2	1.6	0.6	1.5	2.1
Extreme sports (BMX, skateboard)	0.3	1.0	1.3	0.8	1.2	2.0
skating				0.6	No data	
Water sports						
Surfing	0.2	0.9	1.1	0.3	0.9	1.2
Windsurfing	0.2	0.9	1.1	0.2	0.7	0.9
Water skiing	0.2	1.2	1.4	0.2	No data	
TOTAL*	2.5	9.1	11.6	5.0	8.4	13.4

* note: totals relate to participation, not participants
 (Source: Key Note, 2002; Key Note, 2004b, pp.54-55.)

Future Trends

Mintel (2003a) has undertaken some market analysis of people's attitudes towards extreme sports and their likelihood of participating. The analysis gives the percentage of potential participants in a range of sports according to different socio-demographic characteristics. The results suggest that about 12% of the adult population (c. 5.8m people) would like to participate in extreme sports. This is certainly an increase on present participation levels, although the extent of this increase cannot be determined from the available data. However, there remains the very narrow age-related appeal of lifestyle sports: the overwhelming majority of all interest is in the age groups 15-34. After this, interest drops to virtually nil. Other than age, the prime characteristics of those interested in lifestyle sports are:

- Terminal age of education (19+ students have high participation rates);
- Marital and parental status (single people without children have high participation rates);
- Economic activity of local community (those living in ACORN classified areas B and C – affluent urban and suburbanites – have high relative rates of participation).

While these statistics are interesting, it is not possible to establish precisely how they were derived nor how they relate to other participation data. In particular, it is not clear what is

inferred by 'interest in participation': does this translate to potential/latent demand, or some lesser concept related to desire? Neither is it clear how far there is a shared understanding of 'extreme': do people refer to extreme in relation to current practice in that activity, or with respect to their own current practices?

Constraints and limitations

The most immediate conclusion to draw from these data is that information on participation in lifestyle sports is rudimentary at best. The definitions used are hard to determine and none give a comprehensive overview of participation. It is apparent, for example, that the decision about what participation counts as lifestyle or extreme is determined for each sport or activity, rather than according to how it is practiced. Thus, some sports that are legitimately considered to have lifestyle elements (canoeing and kayaking, for example) are not considered at all, while mountain biking is separated from the broader category of cycling on the apparent assumption that no other form of this activity constitutes a lifestyle pursuit. There are thus severe definitional limitations that are then exacerbated by seemingly contradictory findings, presumably caused by differing definitions and data collection methodologies.

What is clear is that most lifestyle sports – and extreme practices in these sports – appeal to reasonably well-educated aspirant single young men (and in some cases young women). On becoming parents, or reaching 35, participation falls away, especially in the more demanding activities. This is certainly a generalisation, with activity in some areas of lifestyle sport (kayaking, sailing, climbing) continuing well into middle age and beyond. There is also evidence of a separation between regular participants and those who engage in lifestyle and extreme sports as part of their vacations.

What the data clearly suggest is that while being known as 'lifestyle sports', relatively few members of the population have lifestyles that include either interest or participation in them. Indeed, even in the most active age and educational groups and locations, participation does not rise above half the population (nor does people's stated wish to participate). In this respect lifestyle sports are remarkably similar to conventional organised sporting activities. For example, the 12% of the adult population who wish to participate in at least one lifestyle sport represent about one-third of those who currently swim and about half of those who cycle – and the 12% is aspirational rather than actual.

What is significant, however, is the level of regular participation, which is low in all conventional physical activities but relatively high in lifestyle sports. For example, the proportion of the adult population who are regular participants in mountain biking (the most popular regular lifestyle sport) is approximately the same as for most conventional organised sports other than snooker, golf, bowls, darts, football and badminton (which all have more regulars). It is also about the same as most conventional outdoor physical activities such as shooting, riding, sailing and game and sea fishing.

When added to the very narrow age band of participation in lifestyle sports, it is apparent that this type of regular commitment is highly significant. This is especially so given the conventional school-leaver drop out from sport and audited physical activity. Indeed, it seems apparent that lifestyle sports tend to enjoy high levels of regular participation and comparatively low levels of occasional use, suggesting that occasional participants

progress rapidly to either regular or non-participation. Given the continuing decline in curriculum physical activity at school and the often limited availability of non-school sports activities, regular participation in lifestyle sports between the ages of 15 and 24 could be highly significant in terms of Government targets. It would also be interesting to know the extent to which these participants remain active in sport once they 'retire' from lifestyle sports: in particular, does the sports literacy offered by these sports translate to conventional, often club-based activities such as golf?

However, the socio-demographics of participation in lifestyle sports suggests that there are major constraints to achieving greater participation, even among the prime age band of current participants. Circumstantial evidence suggests that the primary constraint is perceptual: many people do not believe that they are fit enough to undertake physical activities – even relatively mild forms of cycling. There is also a financial constraint: access to equipment, sites and tuition. As the University of Brighton Consortium (2001) found with respect to watersports, there are relatively few opportunities to learn the skills required for many lifestyle sports and, even when the skills have been mastered, there are relatively few opportunities for participation that do not involve considerable expenditure. Among the focus group participants in the study, those with the greatest propensity to participate in lifestyle sports – young adults – were often the least likely to have the resources to gain access to facilities and training. As a result, many of them turned away from most sporting opportunities, or restricted them to informal activities such as football in the local park.

Even for those with the resources to seek tuition, often as part of an overseas holiday, the opportunities to continue participation at home are limited. To some extent these are climatic and emotional – linking the activities with sunshine and holidays. However, there are deeper cultural issues to address as well, associated with the cultural capital required to join and participate in many small voluntary sports clubs where there is an emphasis on authenticity that may effectively exclude those whose experience of a sport is limited to tuition while on holiday.

Beyond these issues, there are undoubtedly spatial/legal constraints to many forms of lifestyle sports activity. In terms of inland watersports, for example, work by the University of Brighton (2001) shows how little of the total resource in England and Wales is available for use, and how water that is available is often limited to the regular locals who know where to gain access and when, and what types of use are acceptable when they are on the water. Similarly, climbers do not have unlimited access to the best rocks and crags, while the network of bridleways and tracks suited to mountain and other forms of biking is very limited, particularly compared to the provision for walking. In urban areas, there is also a limit to physical supply, with many local authorities wishing to corral skateboarders and cyclists in bespoke, but often poor, facilities.

For many participants, therefore, engaging in lifestyle sports – certainly at the more extreme end – can often also involve engaging in trespass, or uninvited entry into spaces suited to their activities. While this may be, or become, a defining part of the activity (leading to the formation of so-called 'pirate' canoe clubs, for example), it acts as a considerable constraint to the legitimate expansion of the sports, even amongst those most interested in participating. This is exacerbated by a growing concern on the part of land owners and resource managers over the liability and insurance implications of injuries sustained by sports participants when on their property.

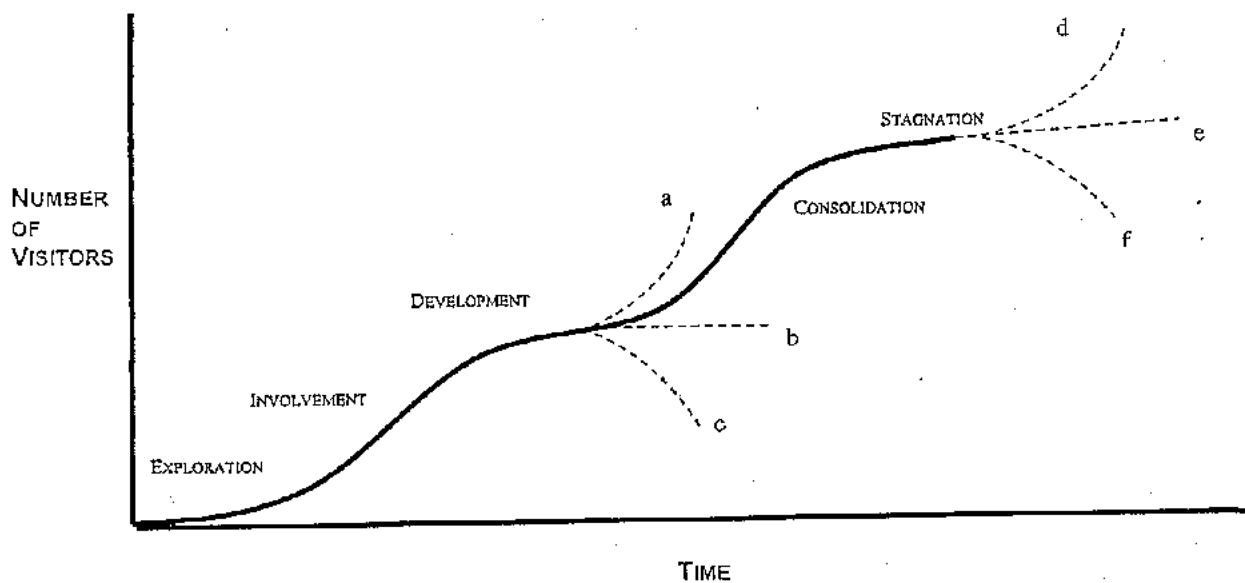
Implications for Resource Management

One of the major implications for resource management is the nature of the market: it is small, specialist, young and predominantly male. The physical quality of the site or resource is highly important to such participants. It is acute to elite participants, who will travel long distances to reach the best sites and conditions for their sport (and will often stay semi-permanently until a better site is found). In addition to the physical qualities of a site, participants will seek an ambiance that accords with their lifestyles. This is unique to each location, but will be built around elements such as music and fashion.

Thus, demand and consumption are very much driven by the elite performers; who seek ever more extreme experiences – and locations in which to perform their sports. And this is very much the key to locating good sites: work with the elite performers, consider local sponsors and media connections, and ensure that a site has sufficient interest to attract and maintain the interest of elite and less skilled participants.

However, it must be recognised that each time a new location is found, the value and kudos of all existing locations is recalibrated (downwards). What governs the success of all supply, therefore, is a need to ensure that it will meet (and continue to meet) lifestyle as well as sporting aspirations. As Butler (2006) has argued, this process is akin to a biological lifecycle (birth, growth, maturity and decline), dominated largely by social forces such that new sites or resources (or in his case resorts) first attract an 'explorer elite' who define the initial style of the venue. Others then follow, reifying the choice of the elite, but at the same time reducing their cultural capital and diminishing the lifestyle choice that those elite have made. Eventually – and unless a proactive approach is taken to management – the site stagnates and the elite begin to look elsewhere – and the process starts again (see Figure 5).

FIGURE 5: RESORT LIFE CYCLE



ADAPTED FROM BUTLER (2006) and LUNDTORP AND WANHILL (2006)

Following the work of Lamarck, Ravenscroft and Hadjihambi (2006) have argued that, to sustain the popularity of a site (the dotted alternative development trajectories in Figure 5), management must continually work to release scope for the elite to demonstrate their superior status and taste. This could be by making the sport ever more testing, or the ancillary facilities more exclusive or remote from the mass users. This implies – as Disney and other resort operators have demonstrated – a continual need to invest in facilities to keep them abreast of lifestyle trends (and a continual need to market and promote the site). In so doing, however, there is a risk that the current inequities in access to lifestyle sports are magnified to the point where lifestyle and exclusivity are synonymous, or where the sporting prowess required to participate is so extreme that increasingly big risks are taken just to remain 'part of the scene' (see Olivier, 2006, for a discussion about the ethics of such extremism). Of course, the interest created by the elite participants can encourage others to have a go, leading to new opportunities to intervene to address the constraints that previously prevented participation.

Also of significance are the supply opportunities created by the demand for competition (and with it, potential access to television revenues). A major example of this has been the growth of interest and participation in signature lifestyle sporting events such as marathon races and 'iron-man' events staged in iconic and exotic locations around the world. While the provision of major events is the preserve of large cities and regions, there is a growing market in small-scale local and sub-regional events. These can be developed around existing sites and facilities, or they can involve creating the necessary facilities on a temporary basis. Again, Butler's lifecycle model applies, for events have to grow and develop if they are to remain popular over time.

Thus, rather than necessarily being price sensitive (in terms of the overall cost of access), the success of activity recreation venues is driven by the quality of recreational and ancillary experience. This means involving experts in planning and managing sites and ensuring that the core elements of the particular lifestyle 'scene' (specific equipment manufacturers or clothing brands, specific DJs or radio stations, etc) are present during the season. As such, providing for lifestyle sports can be an extremely expensive and risky business, especially given the constant requirement to attract new participants as the existing ones retire or move on to different activities.

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

DEVELOPING CANOE TRAILS IN NORTHERN IRELAND

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The post is funded by: Inland Waterways of the Department of Culture Arts and Leisure (DCAL), Environment and Heritage Service (EHS), Northern Ireland Tourist Board and the Sports Council for Northern Ireland (SCNI)

Background

The most popular canoe disciplines practiced in Northern Ireland are:

White water kayaking
Placid water canoeing
Coaching
Sea kayaking
Placid water kayaking

There are currently 17 canoe clubs and over 600 paddlers affiliated to the Canoe Association of Northern Ireland (CANI - Northern Ireland's governing body of canoe sport). In addition, there are many more paddlers across Northern Ireland not affiliated to CANI who paddle for recreational purposes only.

Northern Ireland's extensive natural resource base provides excellent opportunities for recreational paddling. A recent audit has shown that there are 237 sites across the Province where canoe access currently takes place. All canoe disciplines and all levels of ability are catered for. The Causeway coast offers superb sea and surf kayaking whilst Strangford Lough, with its many islands and abundant wild life, offers an excellent canoe touring venue. For open and flatwater canoeing Co. Fermanagh is an ideal destination. Its magnificent lakes of Upper and Lower Lough Erne provide a fifty-mile expanse of water which can be further extended by linking into the River Shannon. The Upper Lough is ideal for touring, as the water is sheltered due to the number of islands dotted throughout its length.

In 1998, canoeing was recognised within the 'Northern Ireland Countryside Recreation Strategy' as an activity 'lacking opportunities for provision'. In response, the Countryside Access and Activities Network for Northern Ireland undertook 'A Strategic Review of Canoeing in Northern Ireland' in 2002. The report highlighted the potential of canoeing in terms of benefiting both the local population and tourists and in particular recommended the development of a network of canoe trails across the Province.

Canoe Trails

A canoe trail by definition is 'a scenically attractive route along a stretch of water suitable for paddlers in kayaks or canoes, with facilities on-shore that allow for overnight stops.

A canoe trail is not necessarily an A-B trip – if the flow of water is gentle then the trail can be started or finished at any point. On the faster flowing rivers a trail can be started at any access point along the trail and can be finished at any point further down stream. In both cases, a trail can be tailored to suit the needs of the user'.

Where possible, use is made of existing facilities along the particular river or Lough such as:

- car parking
- toilet facilities
- jetties/slipways and
- public access to the water.

When necessary, additional facilities are constructed such as canoe steps, floating jetties, parking or turning facilities.

An important element of any canoe trail is the erection of interpretation panels installed at strategic access points along the route. These panels display a map of the trail and include the following information:

- Environmental and historical points of interest e.g. flora and fauna
- Safety information
- General code of conduct

Each canoe trail is also accompanied by the publication of a detailed canoe trail guide. The guide is used predominantly to educate those using the trail about the local natural and built environment, areas to avoid and why, where and where not to camp and safety consideration. The guides are sold at cost price (currently £1 plus 42p postage and packaging) any the money ring fenced for future print runs.

Each canoe trail is also included within the 'canoe trails' section of the main Northern Ireland canoe information web site: www.nicanoeing.com and includes a detailed map and information pages for those who wish to get the information on line.

Benefits

There are a number of benefits to a canoe trail:

Economic - Increasing the tourism expenditure in Northern Ireland and specifically in rural areas. Supporting rural businesses such as accommodation and food providers. Supporting existing canoe businesses and increasing the potential for new canoe businesses providing canoe sales, hire and other support services within Northern Ireland.

Social - Creating new opportunities for canoeists to paddle regardless of age or ability. Providing venues for canoeists to train and compete

Environmental - Encouraging the responsible use of the countryside thereby developing environmental awareness and promoting stewardship of local environments.

Health – canoeing is an activity sport which can be enjoyed and participated by all no matter of age or ability

Management of water users – by agreeing specific public access points and then marketing/distributing the information - canoeists are less likely to access the water on an ad hoc basis which can lead to bank damage and conflict.

Lough Erne Canoe Trail

The first canoe trail in Northern Ireland was launched on Lough Erne, Co Fermanagh, in May 2005 at a cost of £49,000. Funding was received from Fermanagh District Council, EHS, Inland Waterways of DCAL and Fermanagh Local Strategy Partnership through the Natural Resource Rural Tourism Initiative)

Following its launch, the trail received over 13 minutes of prime time TV coverage (BBC and UTV) and over 30 minutes of radio coverage on various radio stations.

The local council has taken on the management and maintenance of the canoe trail panels, whilst Waterways Ireland (the navigation authority for Lough Erne) manages and maintain all of the slipways and launch points. A Steering Group has been set up to deal with any issues that arise from the development of the trail and meets twice a year.

At this stage, it is difficult to gauge the success of the Lough Erne Canoe Trail. However, since the launch of the trail, over 2000 trail guides have been purchased and the website www.nicanoeing.com has had over 19,000 hits since going live in May 2005 of which over 86% were international visitors. Base line information is expected to be produced by the end of 2006.

It is an exciting time to be involved with the development of canoeing in Northern Ireland with funding recently being secured for 4 more canoe trails:

Strangford Lough Canoe Trail – 20km sea trail with the refurbishment of a building on 'Salt Island' – for camping

Blackwater Canoe Trail – a 20km flat river trail

Lower Bann Canoe Trail – a 48km moving water trail with 2 campsites.

Lough Neagh Canoe Trail – a 30km strategic link between the Blackwater and the Lower Bann

It is envisaged that by the end of 2008, Northern Ireland will have 170 kms of canoe trails which can be marketed confidently to both the domestic and international market.

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

GO APE! - A CASE STUDY

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Go Ape!*

The purpose of this paper is to present Go Ape! as a new and innovative arrival in the activity tourism sector. The areas that will be covered include:

- What is Go Ape!
- Go Ape! brand values
- 'Destination Pull Effect' of Go Ape!
- Key Ingredients of 'Destination Mix'
- Safety
- Benefits of Go Ape!
- UK Market Potential
- Liability and Accident Record – Is it defensible?

What Go Ape! is and our brand values

Go Ape! is a multi-award winning high ropes forest adventure. Gorillas (over 18 years) and Baboons (10-17 years) trek from tree to tree through the canopy across a variety of rope bridges, Tarzan swings and zip slides. Participants are provided with appropriate personal protective equipment (PPE), receive comprehensive safety training including a confirmatory practical test, and then negotiate the tree top course without the direct supervision of an instructor. Participants may typically take between 2 and 4 hours to complete the 5 or 6 zones of a course. The zones may be interspersed over 3-10 acres and are designed to make the most of topographically interesting features. Each zone starts with a rope ladder to enable course users to climb into the canopy, and will comprise between 5 and 10 activities. The final activity is always a zip wire that brings participants back to terra firma. They then can walk along paths to the next zone which may be over one hundred meters away before proceeding up the next rope ladder. Go Ape! encourages an exploration of the forest and intentionally tries to geographically disorientate participants such that they get a sense of excitement at being in the depths of the forest. Trail markers are however strategically located to facilitate the easy access of first aid/assistance should it be required.

Whilst above the ground, participants must remain connected to the safety 'belay' system. Participants have 2 safety lanyards connected to their climbing harness. So long as one of these lanyards is attached to the belay system it is impossible to fall. When a participant reaches a junction in the belay system, participants must ensure they connect the second lanyard to the far side of the junction, before disconnecting the first lanyard. In this simple, non technical fashion, participants can remain safely attached at all points on the course. Any participant who does not satisfactorily demonstrate competence in the belay safety

system will not be allowed to proceed beyond the training zone. Instructors patrol the entire course regularly to ensure that participants continue to negotiate the course in a safe manner and to provide assistance should it be required. All instructors are first aid trained, carry a first aid kit, and are connected by radios to the reception cabin which has access to emergency services and more sophisticated first aid equipment.

Most people come to Go Ape! as a group or party. We can train a maximum of 17 participants every half hour and have a capacity of 300 people per day at any course. This typically accounts for 4-5 car arrivals per half hour, of which perhaps only 50% is new traffic. Given the average stay time of 4 hours, 15-20 car parking spaces will realistically be utilized by Go Ape! customers at peak times.

Go Ape! was founded in 2002. It operates 7 courses across England and plans to open 5 further courses across the UK and abroad in 2007.

Go Ape! brand Values

- Keep adventure in Adventure (zero risk = zero development)
- Challenge, surprise, excite.
- Encourage "I can't" to become "I can!"
- Be socially & environmentally responsible
- Create worthwhile, well rewarded jobs

Go Ape! offers physically and mentally challenging fun, laughter and adventure high up in the trees. We see ourselves as an eco-educational experience in the respect that participants absorb valuable risk assessment and risk management skills, whilst having a naturally thrilling time on an environmentally responsible and sustainable activity. An element of risk is designed into the activity. Each participant must attach themselves to the safety belay system. If supervising under 18 year olds, parents or guardians sign forms of acknowledgement accepting responsibility to ensure they monitor under 18 year olds in their care to ensure that they remain correctly attached at all times when on the course. Without this proportionate and reasonable element of risk there would be no developmental benefit arising from the activity. It is the company's belief, shared by many in the adventurous leisure sector that exposure to risk in reasonably controlled circumstances is necessary for people to learn how to safely assess and deal with risks that present themselves in life.

The course is intended to challenge, surprise and excite customers. Different degrees of challenge are designed to suit each individual. Green, blue, red and black routes identify easier or harder options as on a ski slope.

The experience itself requires no energy other than muscle power. It is based on the long term health of the forest. The company commissions leading independent arborists to ensure the ongoing health of the trees. Care is taken in the design phase to ensure that any areas of special environmental sensitivity are not negatively impacted in either the construction or future operation of the course. The company habitually involves English

Nature in the drawing up of an environment management plan and funds the creation of habitat enhancing initiatives such as the creation of dead hedging for invertebrates and small mammals, and the placing of bat and bird boxes.

'Destination Pull Effect' of Go Ape!

In the second year of operation Go Ape! courses typically attract or 'pull' 30,000 or more participants per year to the rural visitor's centres they locate at. The majority of these are new visitors to the existing visitor centre, who had not visited prior to Go Ape! being established. Go Ape! acts as a key 'Destination Draw', luring a new visitor base of predominantly ABC1 customers. The rapid uptake of Go Ape! is driven by a growing national brand awareness, the recommendations to friends and family by previous Go Ape!ers who act as enthusiastic customer ambassadors, press editorials, promotions and a tried and tested head office marketing pre and post launch campaign. Having come for Go Ape!, visitors invariably love their time in the forests and return time and time again to enjoy other activities not necessarily Go Ape!, such as walks, bike rides, picnics, BBQs etc.

At each of our existing sites it has been gratifying to hear that all other businesses do better post the establishment of a Go Ape! course. A symbiotic relationship develops with other on site businesses. Caterers tell us that most non Go Ape! visitors buy just once from them if at all, whereas Go Ape! customers often buy at 3 different times during their visit: first on arrival prior to Going Ape (drinks and a bacon butty perhaps); second, whilst going round the course (someone in the party is often sent back to buy bottled drinks and or an energy boosting snack), third, after finishing (usually a main meal with drinks) well deserved after 3-4 hours of exertion.

Go Ape! has also demonstrated that it lengthens both the length of stay of visitors and also the length of the day that that the visitor centre is busy. Because Go Ape! has a limited maximum capacity every half hour, when the peak hours of 10am-3pm are full, customers are prepared (or choose) to come at the start and end of the day. Go Ape! is invariably booked to capacity from as early 8am to 6pm on weekends, high days and holidays. This additional demand lengthens the hours that it is profitable for existing catering concerns in particular to open profitably (and that usually means the retail outlets attached to), resulting in an improved customer offering to all visitors and more employment opportunities for staff.

Key ingredients of 'Destination Mix'

Go Ape! believes that it has the brand awareness and following to now be commercially viable at a suitable green field site with no infrastructure other than good toilets and a car park. But the company believes that an ideal location will exhibit a 'Destination Mix'. Destination Mix in our eyes is an amalgam of related attractions, facilities and service standards that collectively create a great package that will make customers want to come back not just to Go Ape! but to the visitor centre again and again. Service and value are key. Customers don't mind paying top end prices so long as they get value. If you serve very mediocre tea and coffee but charge coffee bar prices customers will remember feeling ripped off. Similarly, if the loos are unclean and granny is upset the whole family's day will be marred and they will not come back. It's common sense but all too often not paid sufficient attention to, (just think of the majority of Motorway 'service' stations and of the

one or two good ones that you always make an effort to stop at). We believe as a rule of thumb that the greater the Destination Mix the more commercially successful the whole visitor centre will be. The ingredients to the mix include catering, bike hire, specialist bike trails, tree top walkways, adventurous play structures for younger kids, orienteering, retail, educational programmes, quality infrastructure (clean loos, sufficient car parking without queuing at entry or exit, efficient parking payment systems/machines), all access trails, sculpture trails, BBQ stands, concerts, plays and other events e.g. Christmas tree sales, farmers markets, beer festivals etc.

Safety

Clearly safety is foremost on our minds, all of the time. Comprehensive operations and training manuals have been developed and are regularly reviewed and updated to ensure consistently high standards and defendability from litigation. The safety system, construction, operating procedures and equipment are additionally inspected annually by independent specialist engineers. Operations are monitored and regularly audited at all our locations during the season by our internal audit and training team.

In recognition that no governing body exists currently for high ropes courses Go Ape! is participating in the drafting of the European Standard for Ropes Courses. The company also works closely with relevant technical organisations, with Environmental Health Officers (EHO) and with specialist Health and Safety Inspectors to ensure compliance with all relevant existing legislation, regulations and guidance. Indeed we have written assurance from our lead EHO that we do comply.

Benefits of Go Ape!

Social Benefits:

- Risk awareness, risk management and personal responsibility skills
- Physical, healthy, anti-obesity, outdoor activity (ties in with Government policy & National Curriculum)
- Provides for and appeals to the hard to engage tweenagers, teenagers and twenty somethings
- Builds self confidence, conquering fear of heights
- Introduction to climbing for many

Local Benefits:

- Flexible use: from mentoring schemes, to special needs, to team building, family and friends days out and charity fund raising
- Employment (team of 12 at each course)
- Increases length of stay time at site, reducing traffic by reducing total number of car trips per day

- All weather activity
- No opportunity costs: just utilise airspace; exclusive use of forests not required. By locating close to already well used visitor centre, remoter wild and tranquil areas are kept wild and tranquil.

Financial Benefits:

- Direct revenue (share of turnover with landowner)
- Indirect revenue to site:
 - Incremental car park charges
 - Incremental catering spend (3 bites of the cherry)
 - Incremental retail spend
 - Incremental ticket sales for other activities e.g. bike hire, concerts, events
- Indirect revenue to local communities:
 - Weekend destination planned around Go Ape! benefiting:
 - Accommodation providers
 - Other attractions
 - Local retailers
- Employee salary spend in local community

UK Market Potential

Go Ape! appeals to a broad social and physical church. Most shapes and sizes enjoy and conquer the challenge. The minimum age is 10 years but an 83 year old has completed Thetford Forest Go Ape! in a stylish sports jacket, cravat and bulled brogues. The target audience is immense. Historically 62% of participants have been adults. But our courses are well used by school and college students, Scouts, Guides, Christian Children's Fund, Duke of Edinburgh and Prince's Trust schemes as well as by numerous charitable and special needs organisations. We believe that part of the instant success of Go Ape! has been due to the removal of provision of adventurous activity elsewhere for fear of litigation. Tens of thousands of families have come to Go Ape! in recognition that risk assessment skills vital to their children's' development and that Go Ape! is a great environment in which to hone them.

How many Go Ape! courses can flourish in the UK? Well, there are currently 7 and there are 400 plus courses of a similar style in France alone.

Liability and accident record – is adventurous (AKA risk taking) activity defensible?

Go Ape! has the support of specialist insurers who recognise the defensibility that robust, comprehensive, enforced and audited operations and training manuals and procedures can provide. Go Ape! can argue that it is statistically safe. With over 400,000 customers and 2,000,000 zip wire landings behind us, we have incurred a single customer claim (for a broken leg injured during a normal zip wire landing). The company carries £10 million of Employee Liability cover and £5 million of Public Liability cover with AA credit rated insurers.

It may be that after many years of witnessing a rising tide of compensation culture the tide may have started to turn or even begun to abate. Downing Street has started to go on record in support of the benefits of exposure to healthy risk. Key Law Lords judgements (Tomlinson) are beginning to set precedents that give some confidence that the climate may indeed be changing. However, skirmishes may have been won in the fight for what may be seen as the restoration of common sense and proportionality, but the war has not yet been won. It is beholden upon all of us who believe that a healthy respect for and exposure to sensible and proportionate levels of risk are valuable to both individual and national characters, to do all that we can to fight for its retention.

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Chief Gorilla

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

CASE STUDY: NATURAL ADVENTURE

*Yvonne Crook
View Marketing
and*

Director, Aviemore and Cairngorms

The Challenge Ahead

Tourism makes up 80% of all economic activity in the area, supporting 4,000 jobs and injecting over £128 million into the local economy. Of this total 65% is spent on accommodation, food and drink, shopping, entertainment and travel. An additional £31 million occurs as secondary spending in all types of businesses throughout the community.

In the period 2002 – 2004 the value of tourism in the ABSC area grew from £105 million to £128 million – an increase of 22%, which is almost three times the annual average for tourism in Scotland. This dramatic uplift coincided with the opening of the CairnGorm Mountain Railway, Macdonald Aviemore Highland Resort, the designation of the Cairngorms National Park and since ABSC Marketing Ltd began its work.

These are encouraging facts but there are many opportunities for this destination to reap even greater rewards from growing and developing our tourism industry in a sustainable way. We also have to address ongoing issues such as improving the overall quality and consistency of the visitor experience for a more demanding customer, creating year-round employment developing innovation and enterprise, thus ensuring our continued ability to remain competitive.

The Aviemore Badenoch Strathspey and Cairngorm area is facing ever increasing global competition in its bid to attract visitors, although there have been major investments in tourism projects in the area in recent years resulting in an increase in tourism. This growth has to be sustained.

Working Together, It's the Only Way Forward

Recent research by the World Tourism Organisation has shown that most successful and sustainable tourism destinations have well resourced destination management organisations to drive and to coordinate their tourism efforts.

The benefits of having an Aviemore and the Cairngorms destination management organisation were also clearly highlighted in the international benchmarking research commissioned by Inverness, Nairn, Badenoch and Strathspey Enterprise (INBSE). These benefits were then amplified in the destinations visited during the learning journeys undertaken in 2005 to Slovenia, Austria, USA and Switzerland.

The conclusion from all of this evidence is unambiguous and very clear ... this destination needs its own organisation dedicated to the marketing, management, development and coordination of tourism if the Aviemore and Cairngorms area is to succeed in becoming one of the world's best mountain destinations.

We have all the raw materials for success ... a wide range of quality accommodation, attractions and activities ... a superb natural environment ... talented and enthusiastic people ... enterprise and innovation ... a desire to succeed and a commitment to work together. What has been missing up to now has been a leadership organisation capable of pulling all the bits of the jigsaw together to create a coherent, cohesive and competent tourism destination. In short, we need an Aviemore and Cairngorms destination management organisation.

Creating a Destination Management Organisation

Since its establishment in 2004, ABSC Marketing Ltd has rapidly evolved into an efficient marketing machine for the destination currently representing over 50 operators whose combined businesses handle approximately 80% of all visitors to the destination. The Board of ABSC Marketing Ltd has agreed that the Company will, with the support of the community, the Chamber of Commerce, local business associations and the public sector organisations, become a full DMO.

This will mean taking on a wider remit beyond marketing to embrace:

- i. **The growth of tourism spending in the destination** by (a) creating a year-round leisure and business tourism destination, (b) encouraging greater levels of spend, (c) reducing leakage and increasing expenditure retention in the destination and (d) increasing the number of staying tourists;
- ii. **The creation of packages through collaborative working** between businesses designed to meet the specific needs of new visitor markets, both leisure and business;
- iii. **The increase of awareness of the benefits of tourism** within the destination and enhance the benefits for local residents;
- iv. **The further enhancement of the overall quality of the visitor experience** by achieving consistently high standards of customer service; well-maintained

facilities; innovative, market-focused and attractive products and a strong sense of place throughout the destination.

The Job to be Done

The aim is to establish the Aviemore and Cairngorms Destination Management Company (ACDM) as Scotland's first and most efficient and effective destination management organisation. The Company will deliver the following activities:

(i) Marketing and Promotion:

- Market research
- Business monitoring
- Marketing planning
- Marketing and PR activity
- Brand development

(ii) Visitor Services:

- Welcome services and centres
- Volunteer guides and ambassadors
- Interpretation
- Environmental enhancement
- Integrated transportation services
- Facilitating, coordinating and promoting events including art, culture and sport
- Coordinating conservation work/projects

(iii) Community Awareness:

- PR and promotion
- Media partnerships
- Developing volunteers to assist in the visitor welcome
- Community facility development
- Community relations

(iv) Market-Led Product Development/Infrastructure Improvements:

- Identifying product development gaps/needs
- Encouraging businesses to fill these gaps
- Assisting inward and indigenous investors
- Improved signage
- Secure third party funding

(v) Business Support and Development:

- Involvement with the proposed Highland Academy

- Securing additional resources for business support, training and motivation
- Undertaking market and business research.

An area-wide Tourism Development Plan will prioritise these activities and will establish realistic, measurable, but stretching, targets to allow its work to be monitored. The Tourism Development Plan will be prepared by the DMO in close liaison with key stakeholders involved in tourism development in the area.

ACDM will be a company limited by guarantee with a Board of Directors representing its stakeholders. It will have a small-scale executive to implement its plans and will call upon specialist advice as and when required. The Board will have the right to appoint new directors, co-opt or engage non-executive directors as deemed necessary.

The Company will also establish a 'Tourism Advisory Group' that will include all the public sector stakeholders, representatives of the Board and the DMO's director. The importance of the role of the public sector in developing and managing the destination cannot be overemphasised. They are vital partners in this strategic approach and will be core members of the Tourism Advisory Group. This will be a strategic body that ensures a coordinated approach across all organisations. There will be a number of specialist and sectoral groups established to guide its work.

A Partnership Approach is the Key

The philosophy upon which this initiative will succeed is founded upon a genuine partnership approach involving both the private and public sectors. Establishing clear roles and responsibilities and sharing common agendas will reduce the potential for duplication of effort, as well as focusing resources on priority projects which are market led.

It will be essential for the DMO to continue the excellent relationship that already exists with the public bodies, including VisitScotland, Cairngorms National Park Authority, INBSE and the Highland Council. The ongoing support of these bodies together with SNH and the Forestry Commission through core funding and activity funding is vital for the sustainability of the DMO.

The Northern Constabulary will be an important partner for the DMO. The international benchmarking exercise confirmed the importance of sensitive policing to help reinforce the sense of welcome, whilst maintaining a safe, secure, environment which is a high priority for our visitors. Our police officers meet and engage with our visitors on a daily basis and are, therefore, a key feature of delivering a quality visitor experience.

The aim of the DMO is to make this area a stronger destination. This means making better use of all available tourism development funds. The support by organisations to ensure the sustainability of the DMO is essential to achieve this goal. An important aspect of this partnership with the public sector will be to create high level interaction and to develop new ways of working. In this way market-led tourism development can be prioritised within the budgets and work programmes of these bodies.

In Summary

There is a widespread recognition that the ABSC area now needs to take the next big step in order to secure its sustainable future as Scotland's foremost rural tourism destination. The recent investment in product development, together with the momentum created by the designation of the National Park and the very successful marketing by ABSC Marketing Ltd, has established a solid foundation to create a destination management organisation.

This new company will be operational by April 2006. It is only with this organisation can we remain competitive and deliver a coordinated, consistently high quality visitor experience throughout our destination. This is essential to satisfy the needs of our guests. Tourism offers significant benefits for local communities and all kinds of businesses. It is essential that we maximise these benefits. Establishing our own destination management organisation is the key to this success.

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: FROM STRATEGY TO DELIVERY'

CASE STUDY: OUTDOOR CAPITAL OF THE UK

*Anna Trafford
Project Director
Outdoor Capital of the UK*

How did an area of the highlands come to decide to call itself the Outdoor Capital of the UK and to decide to market and manage itself as such?

The presentation given aimed to show what happened to make this come about.

Lochaber is one of the 9 areas that make up the Highland Council area of Scotland, and is located on the west coast of Scotland 100 miles north of Glasgow. It is large geographically, 4,450 km², but has a small resident population of approximately 26,000 and comprises many diverse landscapes that have always given great opportunities for all types of outdoors activities. The area is on the coast and inland is predominantly mountain and high moorland. It includes the small isles, the peninsulas of Ardnamurchan and Morven, Ben Nevis and Glencoe and a host of other mountains, Rannoch Moor, Knoydart and part of the great glen fault line, along with numerous glens, rivers and lochs. Activities include world class diving in the Sound of Mull, winter climbing and summer rock climbing, coastal, forest and hill walking, white water kayaking, sea kayaking, canoeing, sailing, fell running, cycle-touring, mountain biking and ski-ing/snowboarding. The area also has two ski resorts, one of which (Nevis Range) has a mountain cable car. Telford's Caledonian Canal also runs through Lochaber and gives access to sailors from the North Sea to the Western Isles of Scotland.

The area itself has an established tourist industry but had never marketed itself specifically to outdoors enthusiasts, in fact almost the opposite, very little had been done to make it easy for people to take part in outdoors activities and basic provision such as access points and car parking were often not provided to even iconic areas such as the north face of Ben Nevis – a world renowned winter climbing venue. The area also hosts world class events such as the Ben Nevis fell race, the 6 day Trials for motorbikes which have a long and established pedigree, and more recent events such as the Fort William Film Festival and the Mountain Bike World Cup.

What happened to change the local community's attitude and decide to pro-actively seek the active visitor?

The UK's inaugural mountain bike world cup race took place at Nevis Range in 2001 and attracted a crowd of 5000 people. The event was a huge success with riders voting it the best event on the world cup circuit. The area still hosts this event and in 2007 will host the Mountain Bike world championships. The success of this event gave some local people

belief that their area was capable of being compared with some of the worlds other top mountain resorts and comparing favourably.

Foot and Mouth also reared its ugly head in 2001 and although the effects were never as bad in the highlands as they were in England and Wales a group called the Lochaber Mountain Access Group were formed in response to the pandemic. They came up with a report that highlighted the areas unique natural environment and coined the phrase 'Outdoor Capital'. A local businessman Finlay Finlayson was also trying to get a development of Fort Williams waterfront off the ground (the waterfront is an under utilised asset), and saw local publicity about Fort William positioning itself the Outdoor Capital of the UK. He instantly saw the potential for the local area in marketing itself as such and so formed an informal group to push the concept further.

Meanwhile local politicians and business development agencies were looking for ways to aid local regeneration – traditional industries such as aluminium, paper making and fishing were contracting and the current tourist industry only seemed to offer seasonal, unskilled jobs. Meetings were held between the informal Outdoor Capital group and representatives from the local enterprise company and local council employees where it was recommended that the group widen the remit of the concept to include the whole of Lochaber, and not just the town of Fort William and hold public meetings around the area to get the community on board. This was a mixed blessing – community backing is a powerful thing, but it also creates expectation and there was nothing as yet to back up the expectation. The thorny question of what to call the concept was also tackled. To visitors the area 'Lochaber' has no meaning, where as Fort William has some recognition. However it was felt to be very important to include the whole of Lochaber into this initiative so the benefits were felt more widely than just in Fort William. The logo now incorporates both. One of the upsides of this widening of the original area were that iconic places such as Glencoe, Glenfinnan, Rannoch Moor and the beautiful western coasts and islands were included.

A not-for-profit, community company was formed in February 2004.

The group then realised that they needed something concrete to move the concept forward and they commissioned Terry Stevens, a well known tourism expert to examine the initiative, and to see if it was viable. He concluded it was and drew up a business plan, which came up with the group's mission statement 'to be the best place in the UK to experience the outdoors'.... This plan then formed the basis of a complicated funding package put together by the local enterprise company, Lochaber Enterprise. Successful funding was sought from Lochaber Enterprise, the EU, Highland Council and Visit Scotland's Challenge Fund and came together in a complex joint funding package. Lochaber Enterprise were extremely supportive of the initiative, which wouldn't have got off the ground without their support.

In July 2005 two full time members of staff were appointed to implement the business plan. To date the Outdoor Capital has concentrated on marketing the area and lobbying partners to add facilities and events to the area. A community written website has been launched, a 40 page comprehensive guide to the activities available in the area has been distributed nationally through Trail magazine and information given out at events, such as the Outdoors Show in Birmingham and the Mountain Bike World Cup Village. A press office is now under contract and beginning to get results in the national press.

Challenges for the future include keeping the community on board and informed, proving that the initiative is having an effect on local prosperity – hard to prove in a time of pressure for the tourist industry in Scotland which faces challenges for the international visitor from a strong pound and fears of global terrorism, and sourcing sustainable funding – the initial funding package sourced was for two years only. To this end a pilot visitor levy will be piloted for summer 2006.

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APPENDIX A

Programme

Activity Tourism - From Strategy to Delivery

PROGRAMME

10.00 *Registration and refreshments*

10.30 Welcome by Chair

10.35 **Developing Strategy, Market Focus, Partnership Delivery in Product Development**
(Jon Munro and Jim Embrey, Wales Tourist Board)

11.05 **Research into Activity Recreation (based on a recent research project for Sport England)**
(Neil Ravenscroft, Brighton University)

11.35 *Refreshments*

12.05 **Case Study: Development of Canoe Trails in Northern Ireland**
(Matt Peach, Countryside Access and Activities Network)

12.30 Question Time - panel session

13.00 *Lunch*

13.45 **Case Study: Go Ape!**
(Tristram Mayhew, Go Ape!)

14.10 **Case Study: Natural Adventure**
(Yvonne Crook, View Marketing)

14.35 Refreshments

15.00 **Case Study: Outdoor Capital of the UK**
(Anna Trafford, Outdoor Capital of the UK Ltd)

15.25 Question Time - panel session

15.45 Summary (Chair)

16.00 **CLOSE**

APPENDIX B

BIOGRAPHIES OF SPEAKERS

'Activity Tourism - From Strategy to Delivery'
The Priory Rooms,
Bull Street, Birmingham
21 March, 2006

CHAIR

Steve Webb
Director of Strategy & Communications
Wales Tourist Board

Steve Webb joined the Wales Tourist Board in 1980 following six years of employment in local government. He has a Geography degree from Exeter University and a Masters in Tourism Development from Cardiff University. He is a chartered Town Planner. Steve is a member of WTB's senior management team and leads the activities of the Strategy and Communications Division which is responsible for research, business planning and policy development. He also has a specific brief to co-ordinate, manage and support the activities of the four Regional Strategy Directors. Steve is responsible for directing the preparation and delivery of the national tourism strategy and in leading the effective delivery of a corporate communications strategy for WTB.

SPEAKERS

Jon Munro
Product Marketing Manger
Wales Tourist Board

After reading 'business and marketing at university Jon made a living for over five years from managing and developing a variety of activity and tourism related businesses in the UK, Turkey, Australia and New Zealand.

Having decided to settle in Wales Jon worked as marketing manager for a computer software company before moving to the Wales Tourist Board; heading up their product marketing and a new team. He firmly believes that success is based on thorough planning and effective project management – and lots of fun.

When he is not working you'll probably find him making the most of where he lives, mountain biking across Gower, flying his paraglider in the Brecon Beacons or reading the papers with a cappuccino.

Jim Embrey
Activity Tourism Development Manager
Wales Tourist Board

Jim joined Wales Tourist Board in 2002 as Senior Product Development Executive. Working with colleagues in Marketing, Jim was initially involved with the creation of a suite of National Activity Tourism Strategies. In recent years the role has evolved to include working with many organisations to implement the strategies. In June 2005 he was appointed Activity Tourism Development Manager.

Prior to that Jim had 25 years of varied tourism experience in his native Canada and in Wales. For 11 years he was Marketing Director with Harbour Air Seaplanes, the world's largest all-seaplane airline, where he developed a very successful sightseeing flight division.

Neil Ravenscroft
Professor of Cultural Policy
Brighton University

BSc (Hons.) Estate Management (University of Reading); DipRM in Resource Management (University of Toronto); MSc in Recreational Land Management (University of Reading); PhD (University of Reading). Professional Associate of the Royal Institution of Chartered Surveyors. Neil has over 15 years' experience in countryside recreation research and consultancy. Much of his recent work has been for the Countryside Agency, including studies of the demand for countryside recreation in Surrey and Kent, advice on the operation of local countryside access forums (for CA and the Countryside Council for Wales), and advice on the extension of a statutory right of access to include woodlands, watersides and coasts. He has recently completed a European Union Framework V research project on the relationship between urban greenspace and people's quality of life, and was part of the team that advised DEFRA on recreational access to inland water. Neil is currently editor of *Leisure Studies*, is on the editorial board of the *Journal of Leisure Property*, and is a consultant to Sussex Learning and Skills Council, the Countryside Agency, and the Food and Agriculture Organisation of the United Nations.

Matt Peach
Canoe Development Manager - Northern Ireland
Countryside Access and Activities Network

Matt has over 16 years experience in the outdoor world, his work has taken him from Norway to South America!

He returned to the UK in 1995 where he worked an instructor at a large residential Outdoor Centre in the Highlands of Scotland, whilst there he gained many outdoor qualifications from skiing to climbing, he worked with a wide range of clients coaching disabled and able bodied people from as young as 4 to as old as 84!

During his time in Scotland he toured many of the rivers and Loughs by canoe. Matt left the centre in 2001 as Chief Instructor - amongst his qualifications, he holds an Aspirant Level 5 coach award for canoeing.

Matt moved to Northern Ireland with his family 3 years ago, he describes himself as 'a family man with a passion for paddling'!

He trained as a tree surgeon in 2002, but his passions got the better of him and in 2003 Matt joined the Countryside Access and Activities Network and the Canoe Association of Northern Ireland where he now works as the Canoe Development Officer.

Tristram Mayhew
Chief Gorilla
Go Ape!

Tristram Mayhew was sponsored through university by the British Army and spent 6 years leading troops in various roles. He left as a captain in 1997. During the following 5 years he gained a broad commercial experience within multinationals. His final post was Marketing and Communications Manager for Europe for a GE Capital business. Tristram left General Electric to set up Go Ape! with his wife. His business card title is Chief Gorilla.

Yvonne Crook
Managing Director
View Marketing

View Marketing, based in Inverness, is an award winning, brand development/ marketing management, consultancy. The Company was established in 2001 and has rapidly become accepted as one of the most innovative consultancies of its type in Scotland. The Company is headed by Yvonne Crook who has a public sector background providing advice to small and medium sized enterprises and experience in working with communities, promoting destinations and branding areas for competitive advantage. As a partner in several private

enterprises she has been instrumental in their success through a strictly market focused and commercial approach.

Anna Trafford
Project Director
Outdoor Capital UK Group

I was born in London in 1965, graduated in 1988 from Northumberland University (then Newcastle Polytechnic) with a BA (Hons) in Fashion Marketing. I worked until 2001 in press, commercial sales, marketing and brand management mainly for high end British designers such as Ghost and Paul Smith but also worked in high street supply. This work involved extensive travel in Europe, the Far East and to NY. In 2001 I gave it all up to do something meaningful – 13 years with people who believed that buying the latest handbag was important had taken its toll.

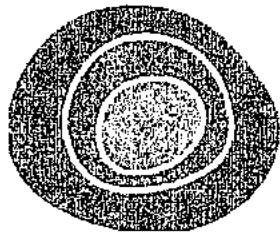
I then worked as Project Manager on a two year partnership project involving the London Cycling Campaign, Transport for London and all 33 London boroughs to produce free cycle maps that covered the whole of London. Hugely successful over a million were distributed in the first 6 months. A further two years followed as the London Cycling Campaign's Marketing, Membership and Fundraising Manager. At the same time I was developing a double life as a keen outdoors enthusiast and spent 4 years on the committee of the London Mountaineering Club – the largest regional club of its kind in the UK. At the end of June 2005 I made the 600 mile trip north to take over the exciting position as Project Director for the Outdoor Capital of the UK initiative and now live in Fort William.

APPENDIX C



Countryside Recreation Network

First Name	Surname	Company Name
Nigel	Blandford	Red Rose Forest
Dan	Boys	Moors for the Future
Emma	Campbell	Visit Scotland
Arran	Cartwright	Snowdonia Active
Breige	Corr	Tourism Ireland
Anthony	Cranney	Northern Ireland Tourist Board
John	Crowe	Shannon Development
Lynn	Crowe	Sheffield Hallam University
Jo	Danson	Cheshire County Council
Adam	Davison	Red Rose Forest
Jackie	Denman	The Tourism Company
Claire	Duffy	Bury Metropolitan Borough
Hazel	Earnshaw	Severn Trent Water
Terri	Edwards	Countryside Agency
Les	Ford	Trans Pennine Trail Project
Chris	Fry	Severn Trent Water
Jorge	Gufic	University of Chichester
Sue	Hayes	Leicestershire County Council
Joanne	Houston	Countryside Agency
Dan	James	Snowdonia Society
Ted	Liddle	Transport Initiatives
Tim	Lidstone-Scott	Peddars Way and Norfolk Coast Path National Trail
Cormac	MacDonnell	National Waymarked Ways Advisory Committee
Andrew	Mackintosh	Defra
Chris	Marsh	Environment Agency, Midlands Region
Aideen	Martin	Countryside Access and Activities Network (N.I.)
Robert	Mayhew	Northumberland National Park Authority
Karina	McCollum	Causeway Coast & Glens Heritage Trust
David	McGillivray	Glasgow Caledonian University
Ian	Meotham	Pembrokeshire Coast National Park
Graham	Neville	Scottish Natural Heritage
Brian	Nicholson	Redcar and Cleveland Borough Council
Paddy	O'Mahony	Faillte Ireland
Susanna	Page	Forestry Commission
Flan	Quilligan	Shannon Development



Countryside Recreation Network

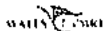
First Name	Surname	Company Name
Sam	Richardson	One North East
Ian	Rowat	Malvern Hills Conservators
Martin	Stark	Environment Agency
Terry	Stevens	Wales Tourist Board
Graeme	Stringer	Forestry Commission
Wendy	Thompson	The Countryside Agency
Corrine	Thorpe	Severn Trent Water
Alyson	Tippings	Blaenau Gwent County Borough Council
Sian	Townsend	Seven Sisters Country Park
Richard	Wagstaff	Afan Forest Park
Joe	Wainwright	Cheshire County Council
Caroline	Walsh	AMCAI
Sue	Williams	Countryside Council for Wales
Geraldine	Williams	City and County of Swansea
Chris	Wright	Snowdonia Active
Naomi	Wright	The Countryside Agency

APPENDIX D

Activity Tourism - from strategy to delivery

Developing Strategy, Market Focus, Partnership Delivery in Product Development

Jon Munro and Jim Embrey
Wales Tourist Board



Activity Tourism - from strategy to delivery

Introduction

Context

Narrative

- > The approach
- > Developing the product strategies


Examples

- > The marketing
- > Results and coordination

Issues

- > Overall
- > Lessons learned

Next Steps




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WTB Mission Statement

"The mission of the Wales Tourist Board is to improve the economic and social prosperity of Wales through the effective marketing and development of tourism"

Jon Munro - Activity Products Marketing Manager

Jim Embrey - Activity Tourism Development Manager




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Development

'Coordinated Marketing and Development'

- > Sustainable Approach
- > The Product Development 'Team'
- > Development Partners - e.g. NPAs, CCW, FC
- > Development Themes - e.g. Business Clusters
- > Funding Mechanisms
- > Being sensitive - changing the marketing focus




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Marketing


What are we trying to achieve ?


- > Sell Holidays !
- > Raise the profile of Wales as an activity destination
- > Generate requests for further information - print and online
- > Provide quality inquiries for individual businesses
- > Build a relationship between Wales and its holiday customers



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1996 - looking back!





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History

The WTB activity tourism initiative

- > Began in 1996 - Non strategic approach
- > Adjunct to main campaigns
- > No resource or clear focus

Taking a fresh look

- > Achieving our Potential (2000-2010)
- > Using outside help - looking at Cycling first ...
- > "Moving up a Gear", a cycle tourism strategy (2000-7)

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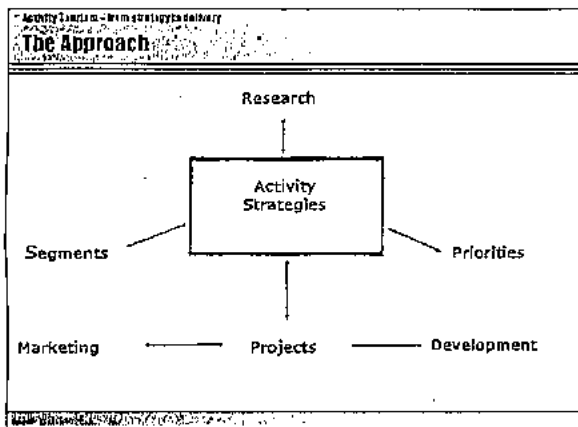
Strategy Objectives

VISION: Product marketing and development, led by market research and planning

The Strategies

Gives us a better understanding of:

- > The potential Value and Volume of each product - Priorities
- > Market segmentation - Types of visitor
- > Our competitive strengths - USPs
- > Address different demographic and overcome preconceptions
- > How to roll out targeted and effective "Campaigns"
- > Coordinated strategic Development, avoiding displacement



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Suite of Activity Tourism Strategies

- > Walking
- > Watersports
- > Adventure tourism
- > Cycling
- > Fishing
- > Horse riding

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New Measurement of Value

- > Based on UKTS
- > National only
- > Much higher value
- > Between 1/4 to 1/3 of all tourism income

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Volume and Value

The National Product ...

PRODUCT	Value (Mill £m/yr)	Potential \$m	Cumulative Growth	Annual Growth
Walking	550	100	17%	35%
Watersports	100	200	40%	50%
Adventure	220	120	65%	74%
Cycling	100	120	67%	34%
Fishing	70	110	54%	84%
Horse riding	10	30	50%	40%

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Partnership/Adfywio

- > WTB has co-ordination role but cannot be main implementation body
- > Necessary to influence/inform partners: LAs, ASPBs, National Parks
- > ADFYWIO: F&M fightback funding for grant scheme that linked:
 - > Tourism
 - > Leisure
 - > Environment
- > £5.2 million in almost 200 projects between 2002-2004
- > 70% supported activity tourism strategies
- > Enabled WTB to proactively implement strategies with partners between 2002-2004

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Examples - the campaigns

First of all, we understand what we are trying to do!

Secondly, we developed a process of developing campaigns;

- > Product - based on an understanding of the target market
- > Campaigns - based on a clear approach to segmentation
- > Working with experts - product, creative, online and media
- > Internal communications planning and project management
- > Thorough approach to evaluation and monitoring

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Examples - the campaigns

The Campaigns themselves

- > Three cycles - New Year, Early Summer and Autumn
- > Niche activity - Walking, Adventure, Cycling, Fishing
- > Closely coordinated with main UK campaign; 'Big Country'
- > Targets - 100,000 responses, Cost per Response (CPR) - £5
- > Overall - ROI 20:1, Value circa £40 million per annum

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Examples - the product



The image shows a collage of promotional materials for walking. It includes a map of Wales with walking routes, a brochure titled 'walking', and a screenshot of a website with the heading 'walking'. The materials are arranged in an overlapping, artistic fashion.

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Examples - the product

The Magazine (printed annually)

- > Key Features - e.g. Open Access, National Trails
- > Walking Areas - signposting the next level of information
- > Travel information, Ideas and other 'Things to do'

Online (developed on a campaign basis)

- > Online ordering - national and regional information
- > Walking routes - www.walkingworld.com

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Examples - the campaigns



The image shows a collage of promotional materials for walking. It includes a magazine cover with a person walking, a brochure titled 'walking', and a screenshot of a website with the heading 'walking'. The materials are arranged in an overlapping, artistic fashion.

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Examples - working with Partners

The screenshot shows the Adventure Wales website with a grid of activity listings. A 'FREE' badge is visible in the top right corner of the grid. The website layout includes a header, a main content area with a grid of activity cards, and a sidebar with a Union Jack logo.

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Examples - increasing online

The screenshot shows a search engine results page for 'walkingwales'. Annotations include a red circle around the search results, a red oval around the 'FREE get away guides' banner, and a red oval around the 'walkingwales' logo. The banner features a 'FREE' badge and the text 'get away guides'.

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Examples - supporting campaigns

The photograph shows a retail display for Adventure Wales products. The display is filled with various items, including bags, hats, and other outdoor gear, arranged on shelves and tables. A person is visible in the background, possibly a customer or staff member.

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Examples - supporting campaigns

The advertisement features a large image of a person walking in a field. Text includes 'Once you've got it come and use it', 'Now you've got it come and use it', and 'Win a holiday weekend for 4 in Wales'. A 'FREE PRIZE DRAW' banner is also present.

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Examples - the numbers

Top line - Campaigns 2004 - total spend ~ £1.3 million

- > Qualified requests for magazines - 102,657 (100,000)
- > Additional online traffic - e.g. mbwales.com ~12.5K unique users pcm
- > Total value associated with these customers - £100.3 million
- > Total additional value generated - £40.9 million
- > £64.8 million taking into account activity expenditure

> In terms of ROI - Walking 62:1 and Adventure 26:1
(c.f. the difference between 'specialist' and 'general' products)

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Examples - development themes

Walking Wales

- > Key - Walking Areas and Towns Initiative
- > Development Partners - e.g. CCW, Local Authorities and N. Parks
- > Being sensitive - changing the marketing focus

Adventure Wales

- > Key - Working with business networks
- > Product development team - talking to businesses
- > Partners - e.g. South West Wales RTP - supporting approach

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Outcomes

Wins for Wales ...

- > New marketing emphasis delivering new customers
- > Mountain biking 'Centres of Excellence'
- > 'Cycle Break' Centres
- > Town and Village walking destinations
- > Activity tourism networks
- > Sectoral driven watersports and horse riding marketing initiatives
- > Cumulatively, significantly repositioned Wales within UK and abroad

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Outcomes

Lessons Learned ...

- > Historically access to countryside in Britain is free
- > Easy to build something (capital), difficult to maintain it (revenue)
- > Therefore currently not sufficiently resourced
- > Learn the lessons of what works elsewhere -- skiing and golf
- > Public sector future may be through health initiatives
- > Must be true sustainable tourism
- > Partners work to different agendas and timelines
- > Goal of consistent local delivery
- > Possible to lose strategic direction ~ 'Flavour of the Month'
- > Jobs often go to outsiders due to lack of exposure for local children of AT
- > Wales has moved more quickly under devolution

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Discomfort

Comfort

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Next Steps - Planning and Strategy

Activity Tourism Action Plan (2005-7)

- > Based on our initial success -- 'a list of things to do'!
- > Brings together common themes across the strategies
- > Outlines clear marketing and development projects
- > Used as a framework for measuring progress
- > Used as a framework for reporting to our partners / stakeholders
- > Growth Bid - bidding for more resources

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Next Steps - Campaigns

'Increasing Yield' -- selling more stuff!

Based on a successful programme of customer acquisition;

- > The Industry is developing high quality products and packages.
- > We **MUST** make the connections.
- > Increasing the value of our enquiries to Wales and individual businesses.
- > A combination of things;
 - > More relevant communications and product offers.
 - > Ongoing relationship building -- developing CRM
 - > Understanding our roles - marketing and development

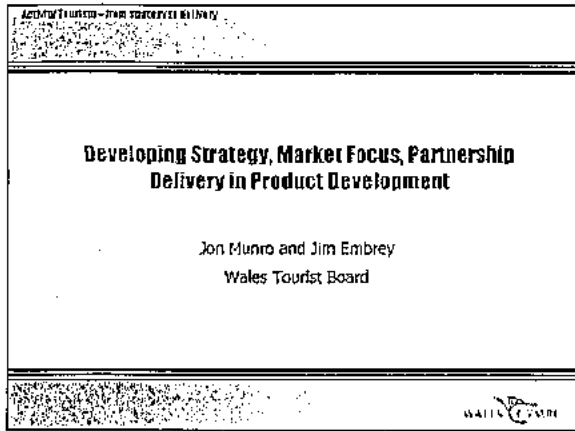
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Thank you

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John Munro and Jim Embrey
Wales Tourist Board



2. Understanding Lifestyle Activities

- Life 'style' sport, consumption and politics
- new forms of social identity, consisting of
 - Choices** – people themselves identifying attitudes values and tastes that are significant to them;
 - A Cultural, consumption or leisure** – these choices; and
 - Patterns, affiliations or sensibilities** – that characterise these personal choices.

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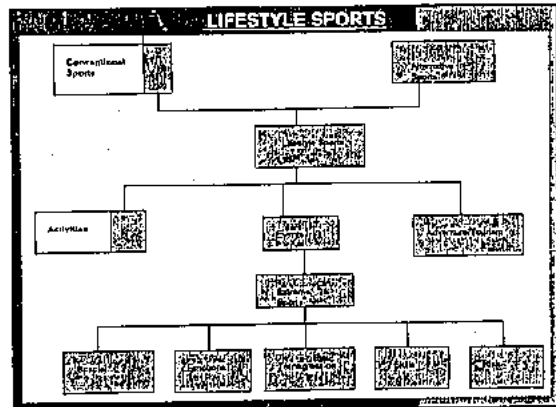
- "Ask any extreme sports participant and they will tell you that their sport is more than just a sport – it's a state of mind and a way of life. It's about challenge, adventure and pushing the boundaries. Sometimes it involves competing against others, more often it involves challenging your own limitations and pushing them to the max. It's about meeting and sharing your enthusiasm for your sport with a like-minded group of people and its about fun, challenge and excitement".

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Three central concepts

- 'alternative' (practiced in different ways to conventional sports and incorporating descriptions such as 'new', 'post modern' and 'post industrial');
- 'lifestyle' (meanings related to personal factors beyond success in competition – although not denying that competition can be an element of the practice of lifestyle sports, and incorporating descriptions such as 'action', 'wizz' and 'sports');
- 'extreme' (a label given to some aspects of practice associated with risk-taking; also associated with branding and commodifying some aspects of practice);

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Understanding Lifestyle Activities

- Lifestyle activities and governance

"Climbing is a game without rules. Many people can't handle that. So they put their trust in governing, seductive technology, blindly follow their guidebook, grading or utterance, no matter how difficult the rules is that there are no rules, then following the rules can get you killed." (Ward, 1996b, p.2)

- Pushing the boundaries

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3. Participation in Activity Sport

- The player not the sport
- Understanding the participants: serious play

"the systematic pursuit of an amateur, hobbyist or volunteer activity that is sufficiently arduous and interesting for the participant to find a purpose there in the acquisition and expression of special skills and knowledge" (Stebbins, 1982, p.3).

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1. the occasional need to persevere
2. tendency toward careerism
3. significant personal effort based on specially acquired knowledge, training, or skill
4. durable benefits
5. the development of a unique ethos
6. strong identification with the chosen pursuit

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Participation in Activity Sport

- Keeling (2003), the Welsh adventure tourism market:
 - *Samplers.*
 - *Learners.*
 - *Enthusiasts.*
 - *Dabblers.*
- Participation Data, age, SEG, gender

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Extreme sports that 11-14 year-olds participate in by gender, 2003

	Male (%)	Female (%)	Total (%)
Mountain biking	22.7	13.3	18.0
Snowboarding	3.1	4.0	6.1
Mountain Climbing	10.6	9.3	10.0
Skateboarding	27.5	13.8	20.7
Rollerblading	21.7	21.7	21.7

Taken from TCI Youth Survey of 5,819 youths aged 7-14 years. (Source: 2004)

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Participation in Activity Sport (cont)

Penetration of popular sports and fitness activities (% of adults)

	2001 England (%)	2002 England (%)	2003 England (%)	2004 England (%)	2005 England (%)	2006 England (%)
Outdoor pursuits						
Mountain biking	10.7	11.9	12.6	13.5	14.0	14.5
Walking, non-organised	11.1	12.1	12.3	12.4	12.5	12.6
Rock climbing, climbing	0.4	1.7	3.6	7.4	11.1	14.7
Parasailing, abseiling, abseiling	0.1	0.1	0.1	0.2	0.2	0.2
Abseiling				0.6	0.6	0.6
Water sports						
Canoeing	0.2	0.2	0.2	0.3	0.3	0.3
Windsurfing	0.7	0.8	0.9	0.9	0.9	0.9
Water skiing	0.2	0.2	0.2	0.2	0.2	0.2
Total	23.1	26.7	31.6	36.9	42.9	49.3

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Future Trends

- about 12% of the adult population (c. 5.8m) would like to participate in extreme sports.
- The overwhelming majority of all interest is in the age groups 15-34.
- Other than age, the prime characteristics of those interested in lifestyle sports are:
 - Terminal age of education;
 - Marital and parental status;
 - Economic activity of local community

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Constraints and limitations

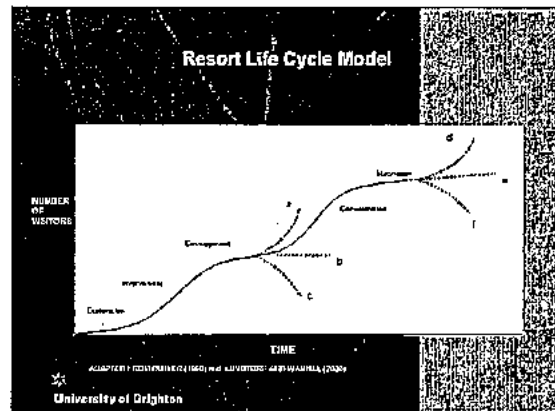
- Person-specific perceptions: health, fitness
- Financial constraints (to seek tuition, or to access participation)
- Climatic perceptions (UK is not the place for a full recreation)
- Physical constraints (lack of suitable terrain)
- Accessibility (legal and physical considerations)

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4. Implications for Resource Management

- **Narrow age-dominated target market**
- **Quality of recreation experience highly dependent on physical quality of the site allied to the social quality of the atmosphere**
- **Demand and consumption driven by the elite performers who seek ever more extreme experiences**
- **Authenticity of experience (and location) is important**
- **Result: most sites and facilities have a 'life cycle' which describes their development from new attraction to old**

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Conclusions

Providing for activity recreation is high risk because:


- **Narrow market segment (and minority participation even in this segment)**
- **Competition for spend**
- **The person, not the sport**
- **Relentless pursuit for new challenges**
- **Quality of the social scene = core to the recreational experience**
- **Thus investment = high risk**

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**Developing Canoeing
 in
 Northern Ireland**

Matt Peach - Canoe Development Officer




Background:

- * September 2002
 Strategic review of canoeing opportunities in Northern Ireland.
- * November 2003
 Appointment of Canoe Development Officer.

The Strategic Review considered:


- Existing facilities
- Current marketing
- Actual and latent demand
- Case studies from elsewhere
- Priorities for future development



The Canoe Association of Northern Ireland
 and
 The Countryside Access and Activities Network


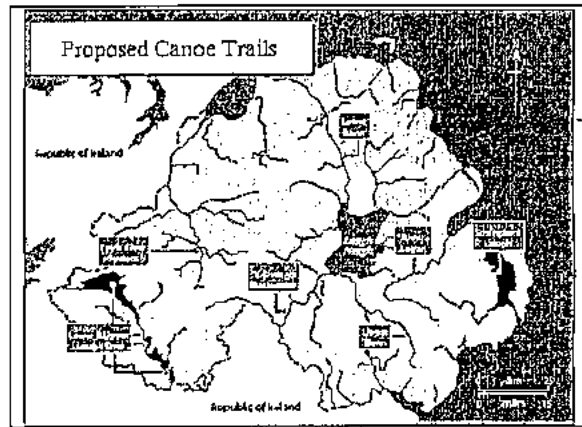
Vision

"A country with a wealth of sustainable opportunities for keen and environmentally aware visiting and local paddlers to explore and enjoy rivers, lakes and sea with good water quality and high nature conservation value; By kayak or canoe; And where river users show mutual respect and are welcomed by river managers and riparian owners"





9 Key Objectives

- Improving facilities
- Developing a series of canoe trails
- Developing events
- Water quality improvement
- Water safety
- Comprehensive information for canoeists re: access
- Encourage development of canoe facilities
- Develop environmental awareness
- Improve relationships with other users

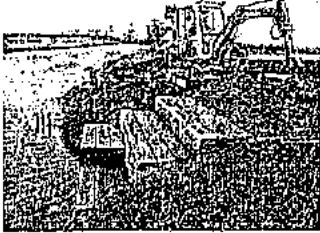



What is a canoe trail?

"A scenically attractive route along a stretch of water suitable for paddlers in kayaks or canoes, with facilities on shore that allow for overnight stops."




Elements of a canoe trail:




Public Access and Egress along the trail

Elements of a canoe trail:




Parking

Elements of a canoe trail:




Toilets

Elements of a canoe trail:



Camping and Refreshments

Elements of a canoe trail:




Canoe and Equipment Hire

Elements of a canoe trail:



Access 1: Muckross

Lough Erne canoe trail

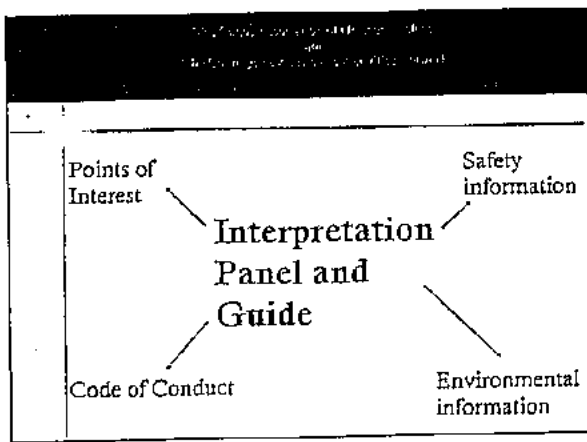


On Shore Interpretation

Elements of a canoe trail:

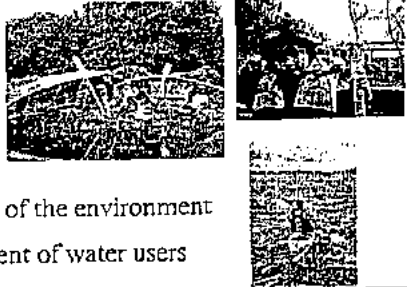



Canoe Guide



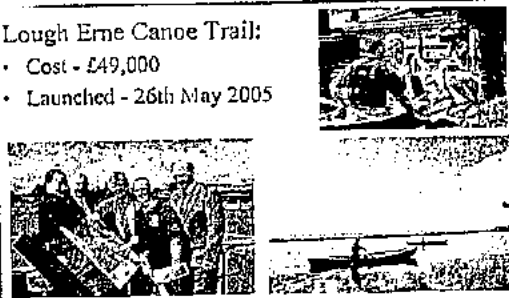
Benefits:

- Social
- Economic
- Health
- Protection of the environment
- Management of water users




Lough Erne Canoe Trail:

- Cost - £49,000
- Launched - 26th May 2005




Lough Erne Project:


- Installation of 10 interpretation panels
- Publishing of a canoe guide
- Marketing the trail
- Web guide and map




Trails on the Move!



Blackwater Canoe Trail




Strangford Lough Canoe Trail



Lower Bann Canoe Trail



Blackwater project - £155K

- Installation of up to 8 interpretation panels
- Installation of up to 7 canoe steps
- Publishing of a canoe guide
- Marketing the trail
- Establishing a camp site
- Web guide and map





Strangford project - £60K+

- Refurbishment of Salt Island Bothy
- Installation of up to 7 interpretation panels
- Publishing of a canoe guide
- Marketing the trail
- Web guide and map



Lower Bann Project - £74K

- Establishing a new camping site
- Installation of up to 15 interpretation panels
- Publishing of a canoe guide
- Marketing the trail
- Web guide and map

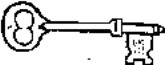



Future Development:

- Upper Bann - no research to date
- Lagan - no research to date





The Canoe Association of Northern Ireland
 and
 The Countryside Access and Activities Network

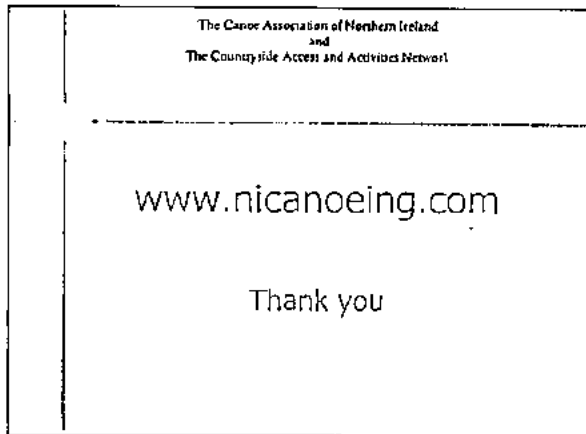


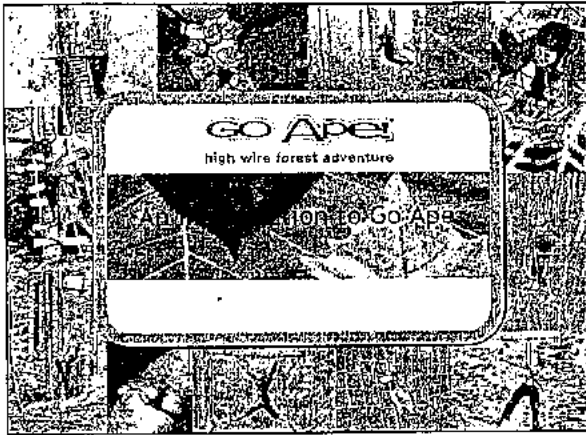
Partnership and Communication are the key!

- Statutory bodies
- User Groups
- Councils



Matt Peach
Countryside Access and Activities Network





GO APE!
high wire forest adventure

Go Ape! Introduction

1. What Go Ape is and our values
2. The Go Ape 'pull effect' and ingredients of the Destination Mix
3. Benefits of Go Ape
4. UK Market Potential
5. Health & Safety: is it defensible?
6. Liability and accident record
7. Q & A (hopefully) A

GO APE!
high wire forest adventure

The Go Ape! Concept

- Go Ape! is a multi-award winning high ropes adventure.
- Gorillas and Baboons trek from tree to tree through the canopy across rope bridges, tarzan swings and zip slides.
- Offers physically and mentally challenging fun, laughter and adventure high up in the trees

GO APE!
high wire forest adventure

The Go Ape! Concept

- Eco-educational experience. Participants absorb valuable risk assessment and risk management skills, whilst having a naturally thrilling time.
- Carbon neutral, environmentally sustainable activity, based on the long term health of the forest.


GO APE!
high wire forest adventure

Go Ape! Values

- Keep adventure in Adventure (zero risk = zero development)
- Challenge, surprise, excite.
- Encourage "I can't" to become "I can!"
- Be socially & environmentally responsible
- Create worthwhile, well rewarded jobs

GO APE!
high wire forest adventure

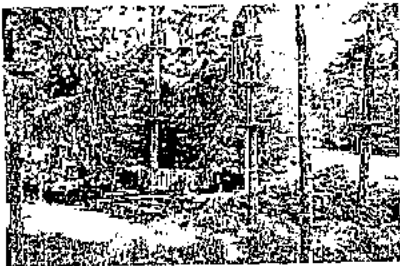
The Course



Different degrees of challenge to suit each individual (green, blue, red, black options)

GO Ape! High wire forest adventures


The Course



Ladders are protected by enclosures to prevent unauthorised access

GO Ape! High wire forest adventures


The Course



Natural materials used to blend into landscape

GO Ape! High wire forest adventures


The Course



Appeals to big kids of all ages (minimum age of 10) Oldest we know of: 63

GO Ape! High wire forest adventures


The Course



Minimum of 3 acres of woodland required, close to facilities. Trees need to be a minimum of 35cm diameter at chest height.


GO Ape! High wire forest adventures

The Course




GO Ape! High wire forest adventures

The Course




GO APE!
High wire forest adventures




Environmentally sensitive

- Go Ape is built on the principles of high quality, low impact, habitat improving development.
- Trees are protected and independently inspected by leading arborists annually to ensure their continuing good health.
- We consult with local environmentalists to create an environmental management plan delivering a positive net environmental gain.


GO APE!
High wire forest adventures




- Timber from sustainable sources used for site build




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High wire forest adventures




- Adjustable collars protect trees from damage




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High wire forest adventures



- Wood chip is used in landing zones. It provides a natural impact absorbing surface and is a great habitat for bugs and beetles, benefiting birdlife.




GO APE!
High wire forest adventures



Low Impact Visitor Footprint


- Most people come to Go Ape in small groups.
- We can take a maximum of 15 people every 30 minutes when open. 300 max per day.
- The activity accounts for 4-5 car arrivals per half hour, of which perhaps only 50% is new traffic
- 15 - 20 new car park spaces to be considered

GO APE!
High wire forest adventures




Destination Draw Effect

- Go Ape pulling power: 30,000+ participants pa.
- Creates 'Destination Draw' to your park
Driven by brand awareness, customer ambassadors, editorials, promotions and marketing
- Symbiotic mutually beneficial relationship with other on site components e.g.:
Catering, Bike hire, Tree top walkways, Adventurous play structures for younger kids, Orienteering, Retail, Educational programmes, Quality Infrastructure (fios, car parks, buildings, trails), all access trails, BBQ stands




Safety

- The safety system, construction, operating procedures and equipment are independently inspected annually by competent engineers.
- Go Ape is participating in the drafting of the European Standard for Ropes Courses.
- Each participant is personally fitted with a safety harness by an instructor. Each participant receives a comprehensive safety briefing and demonstration.




Benefits Social

- Risk awareness, risk management and personal responsibility skills
- Physical, healthy, anti-obesity, outdoor activity (ties in with Government policy & National Curriculum)
- Provides for and appeals to the hard to engage tweekagers, teenagers and twenty somethings
- Builds self confidence, conquering fear of heights
- Introduction to climbing for many




Benefits Local

- Flexible use: from mentoring schemes, to special needs, to team building and charity fund raising
- Employment (team of 12 at each course)
- Increases length of stay time at site, reducing traffic by reducing total number of car trips per day
- All weather activity
- No opportunity costs: just utilise airspace; exclusive use of forests not required
- By locating close to already well used visitor centre, remoter wild and tranquil areas are kept wild and tranquil.



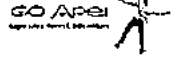
Benefits Financial

- Direct revenue (share of turnover)
- Indirect revenue to site:
 - Car park charges
 - Incremental catering spend (3 bites of the cherry)
 - Incremental retail spend
 - Incremental ticket sales for other activities e.g. bike hire, concerts, events
- Indirect revenue to local communities:
 - Weekend destination planned around Go Ape benefiting:
 - Accommodation providers
 - Other attractions
 - Local retailers
 - Employee salary spend




Market Potential

- Size: 400 in France, 8 in UK
- Age mix (10 to 70+ years) 62% 18+years
- Ability Mix
- Disability: Learning; Physical
- Socio-economic mix
- Educational: Students; Scouts/Guides; CCFs, DofE, Prince's Trust etc.
- Marketing push effect of Go Ape brand
 - Customer database, Email marketing, Strong emotional loyalty to the activity and brand (78% returners)




Health & Safety

- Each participant must demonstrate that they can negotiate the course safely before he or she is allowed to progress.
- Rope ladders are taken up out of hours and locked to the platforms to prevent misuse.
- During operation rope ladders are protected from unauthorised users by a stockade with a security coded gate.




H&S - Is it defensible?

- Participating in working group drafting a European Standard for ropes courses
- Robust, comprehensive and defensible operations manuals and training programmes
- Independent annual operational and structural inspections by specialist British engineers up to speed with UK law
- Written assurance from our lead Environmental Health Authority that Go Ape complies with all relevant UK H&S law, regulation and guidance



Liability & Accident Record


- Insurance cover
£10m EL
£5m PL
- Claims History
400,000 participants went ape with us but only one made a claim
Robust procedures minimise risk of injury and likelihood of claims
- Liability
Climate may be changing, supported by Downing St comments and Law Lords 'Tomlinson' findings



Customer Comments

• "We all thoroughly enjoyed ourselves. We have never done anything like this before, although two of us are afraid of heights we still did the whole course, and were very glad we never backed away from it. It has been nearly a week ago and we are still talking about it."

Mrs Y Somogyi, Thetford.




Customer Comments

"What a superb idea Go Ape is, and beautifully blended in the forest. Six ladies all 50 plus had a great time swinging in the rain. Thanks to all the staff for their humour and patience on such a bad weather day. We will be back!"

Susan, Grizedale


"Go Ape! is the most amazing experience, I am urging all my friends to try it."

Sue, Grizedale Valley




Awards Won

- NFU Countryside Rural Tourist Attraction of the Year 2003
- Small Visitor Attraction of the Year 2005 (South West Tourism), Enjoy England Excellence Awards
- All our sites have been accredited by Visit Britain's Quality Assured Visitor Attraction Scheme



Thank You

Any Questions?


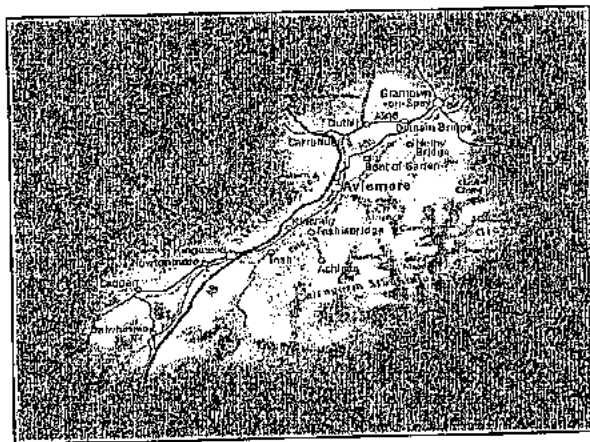


view
marketing

Yvonne Crook

Aviemore

Yvonne Crook
Director
Aviemore and the Cairngorms
Destination Management Ltd

Aviemore

Outdoor Activities

- Archery
- Clay Pigeon Shooting
- Climbing
- Flat Water Kayaking
- Golf
- Gorge Walking / Swimming
- Mountain Biking
- Horse Riding / Pony Trekking
- Moving Water Kayaking
- Navigation Skills
- Off Roading
- Open Canoe Expeditions
- Open Canoe Flatwater


Aviemore

Outdoor Activities

- Orienteering
- Quad Trekking
- Rock Climbing / Abseiling
- Sailing
- Ski Mountaineering
- Ski Touring Nordic
- Skiing
- Snowboarding
- Summer hill Walking
- Telemarking
- White Water Rafting
- Windsurfing
- Winter Hill Walking

Aviemore

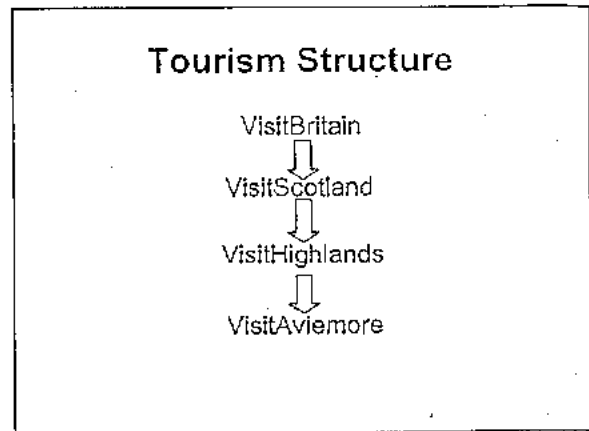
Tourism Business
Worth £128m
Year round employment for 4,000 people



Aviemore

ABSC Marketing Ltd

- Company Ltd by Guarantee
- Small (representative) Board of Directors
- Marketing fits within VisitScotland strategy
- Contributes to the Sustainable Tourism Plan of the Cairngorms National Park
- Built good relations within the tourism industry we operate



Aviemore

ABSC Marketing Ltd

- 50 participating businesses
- £55,000 - private businesses
- £200,000 - total budget
- Good support from public sector and VisitScotland

Brand and 'Natural Adventure' message

- Where's your sense of adventure?
- Scotland's natural playground
- Unspoiled but well connected...

the natural adventure
Aviemore
and the Cairngorms

Aviemore


- Profile raising activities
- Familiarisation visits
- VisitScotland Campaigns

Aviemore

- www.visitaviemore.com
- Accessing more than 12,000 visitors per month

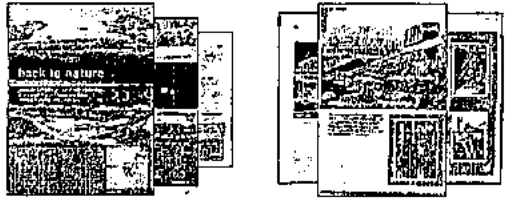
Aviemore

- Destination Map



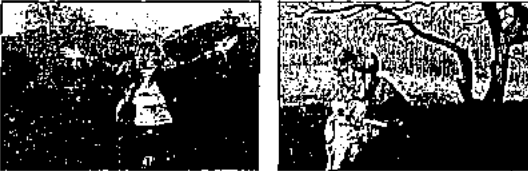
Aviemore

PR – £60k investment / £550k Advertising Equivalents



Aviemore


PR – promoting Aviemore and the Cairngorms as a winter destination



Aviemore

New Groups – Working Together:

- Outdoor Activity Providers
- Business Tourism
- Golf Clubs
- Events



Aviemore


Direct Mail



Aviemore

Outdoor Activity Marketing


- Database of Availability
- Packaging with Accommodation Providers
- Producing Activity Brochure
- Information Availability – Pre Destination / At Destination
- Creating and Promoting Golf Pass



Aviemore

Market Research – progressing to 2006


- Area visitor survey
- Trends in tourism
- Scotland's Ambitions for Growth
- International benchmarking survey



Aviemore

Key Facts

- 78% of visitors – repeat visits or recommendations
- 40% of business tourism visitors – likely to return for leisure visits
- Internationally competitive market place




Aviemore

Key Facts

Scotland's Ambitions for Growth

- Grow tourism by 50% by 2015 (£4.5bn in 2003 to £6bn by 2015)
- Aviemore and the Cairngorms Contribution?



Aviemore

Key Facts – International Benchmarking

- Critical success factors:
 - Dedicated DMO
 - Strong leadership
 - Well resourced/funded
- Market led and customer focussed
- Maximising benefits for communities and visitors

Aviemore

The Need for Destination Management


'By working together on a shared agenda we can all achieve more than working separately'

Montreu-Vevey Tourist Organisation

- The need to 'stand out'
- Put bits of the jigsaw together
- Maximise the benefits to the community and local business
- Enhance the visitor experience

Aviemore

Aviemore and the Cairngorms Destination Management



Aviemore

The DMO...Its Mission

To position Aviemore and the Cairngorms as one of the world's leading, year-round destinations

Aviemore


The Job to be Done

- Ensure integrated, market-led approach to tourism planning, development and marketing
 - market research
 - Coordinating product development and focused investment
 - Improving visitor services in destination
 - Driving higher standards of quality service
 - Interaction and communication in destination
 - Marketing activity and promotions

Aviemore

Structure and Organisation

- Board of Directors with Executive Office
- Tourism Advisory Group / Stakeholders
- Sector and Specialist Groups
- Strong ongoing links with Chamber and Business Associations



Aviemore


Funding and Finance

- Budget requirement of £845,000 for industry worth £128m investment
- Multi sourced:
 - Public = £295,000
 - Private = £550,000
- Businesses = £150,000
- Voluntary Tourism Levy = £300k
- Sponsorship = £100k
- Voluntary Tourism Levy important to philosophy = essential

Aviemore

Voluntary Tourism Levy

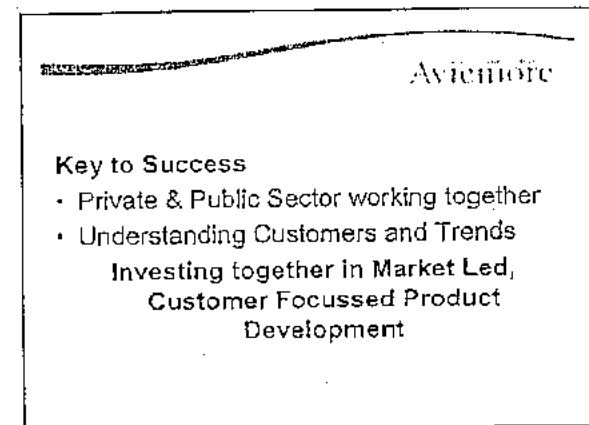
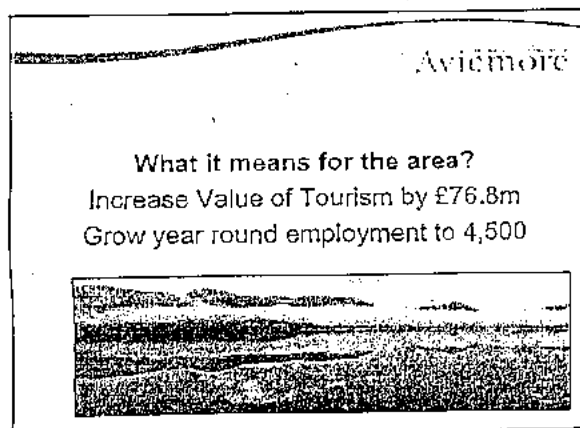
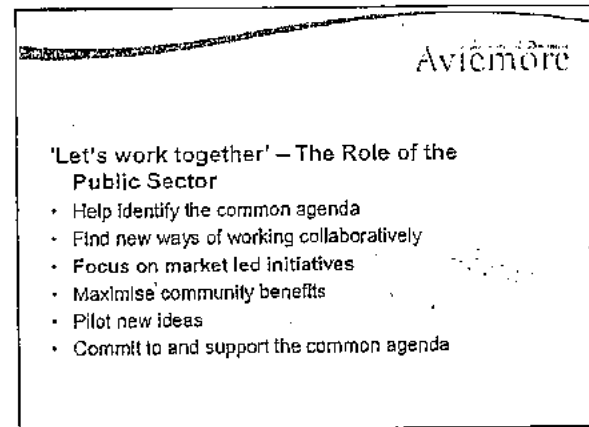
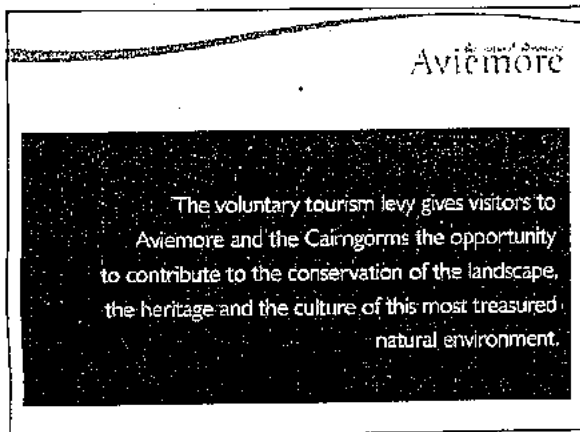
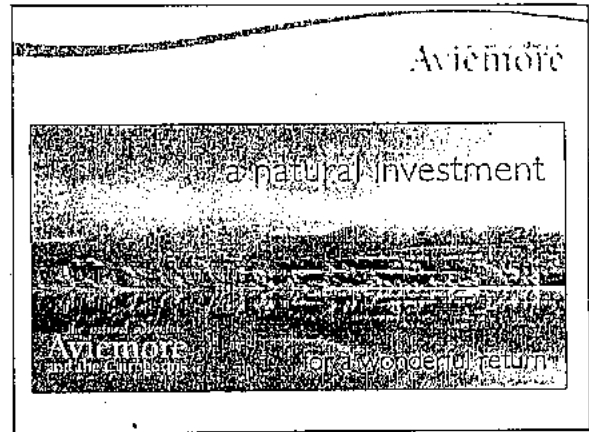
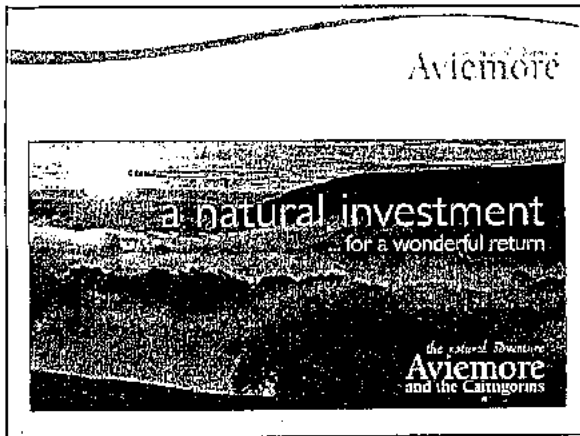
- Guests invited to contribute £1 per room per night
- Maximum of £2 contribution
- Levy invited at Accommodation only
- Pilot for one year / development plan



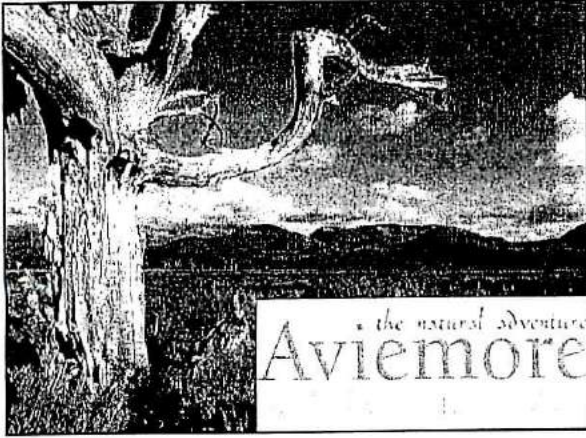
Aviemore

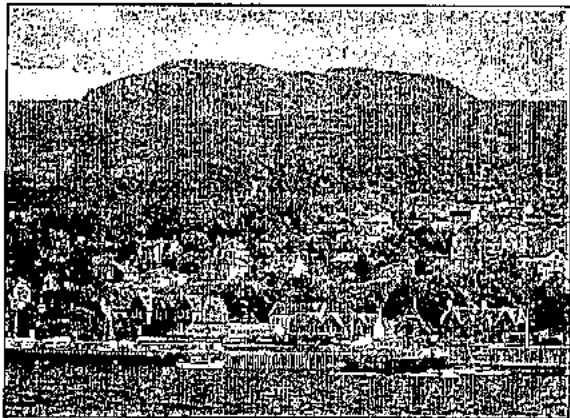
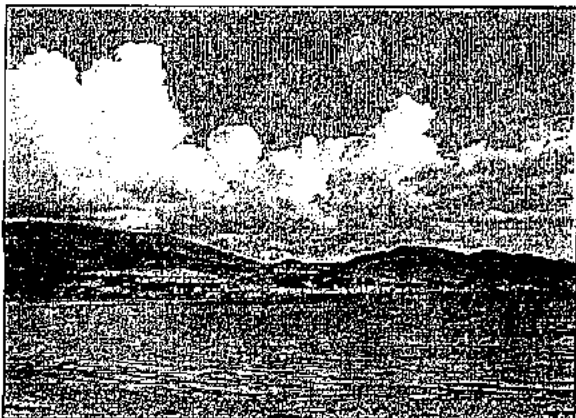
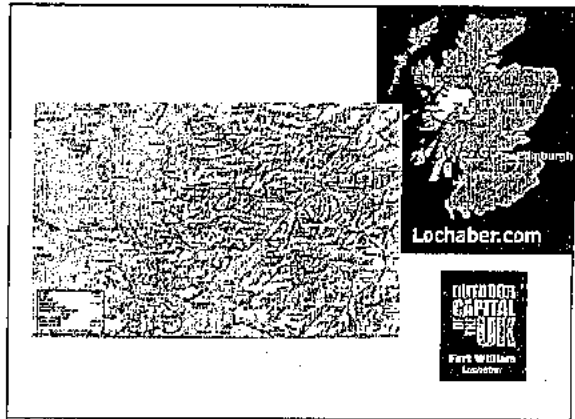
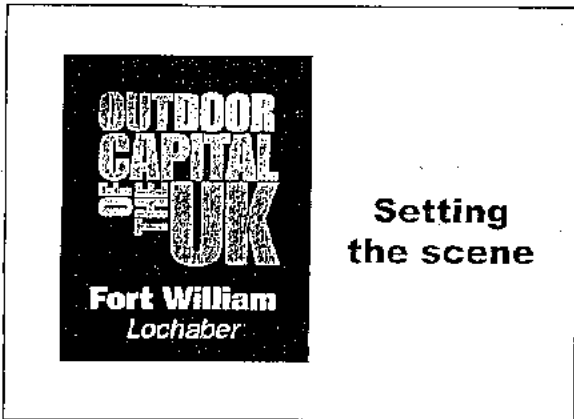
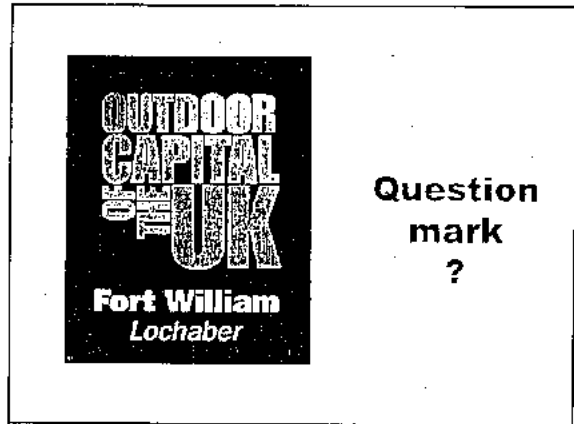
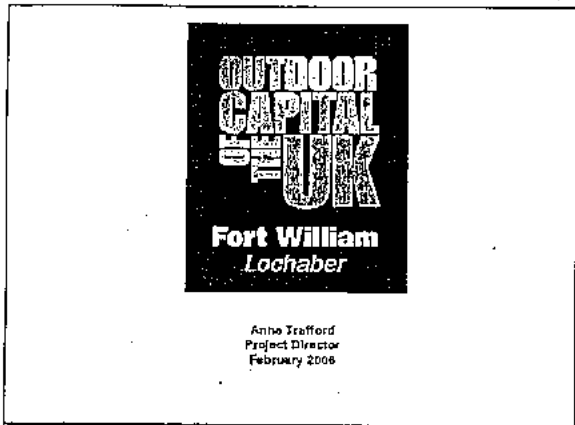
Voluntary Tourism Levy

- Funds Committed to Environmental and Heritage Projects
- Projected £250,000 income in year 1
- Heritage Lottery Fund interest in Match Funding
- Significant new private investment for the area
- Need to manage marketing and PR well

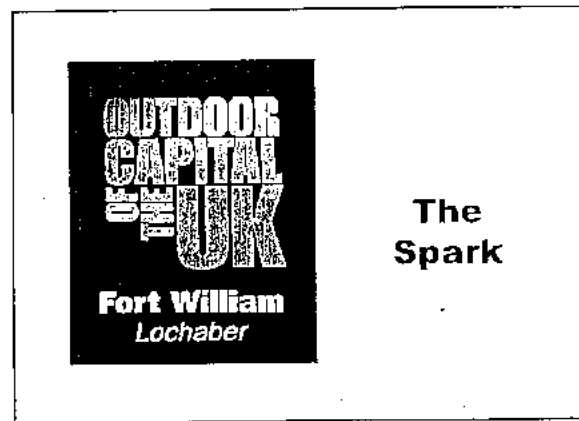
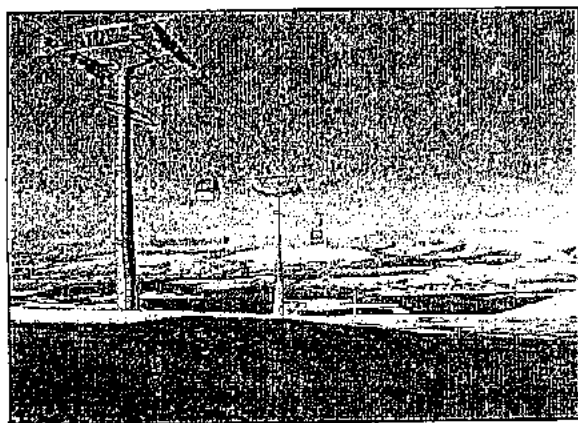
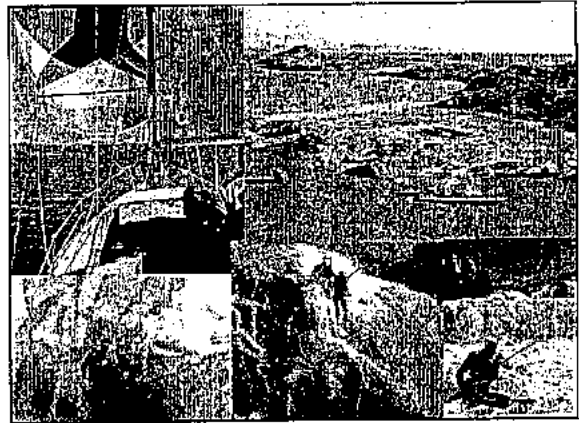
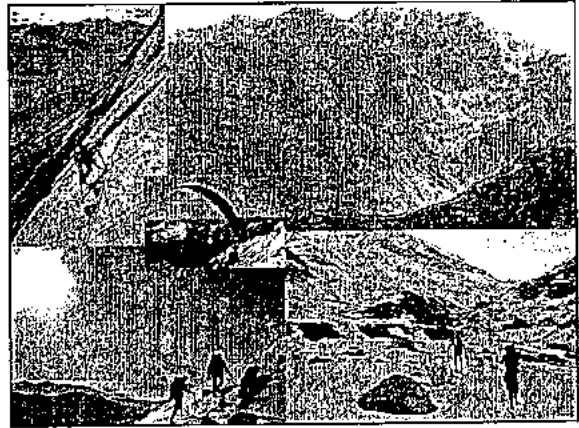


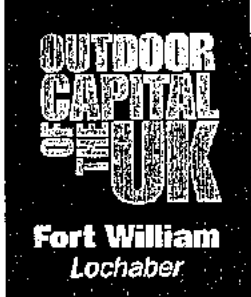
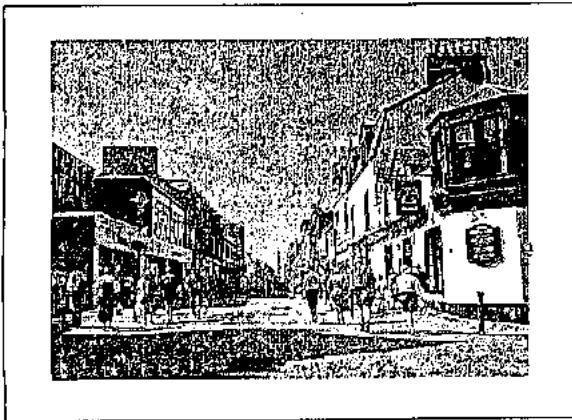
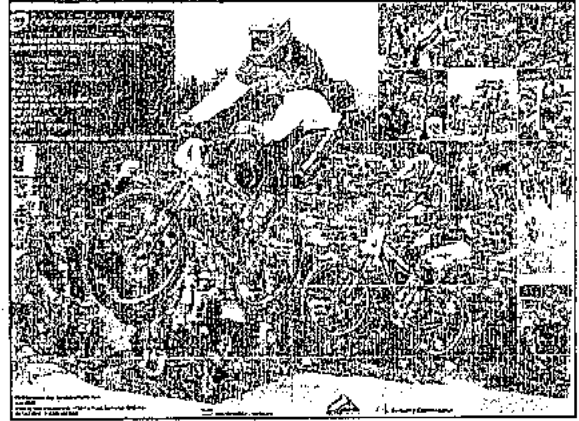
Yvonne Crook
View Marketing



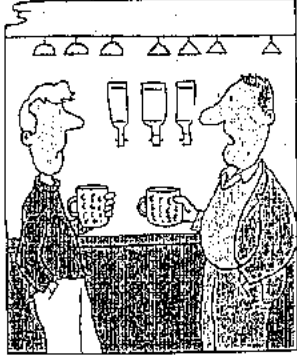


Anna Trafford
Outdoor Capital of the UK



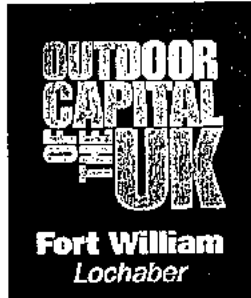


Changing Landscapes



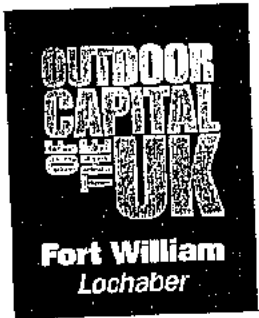
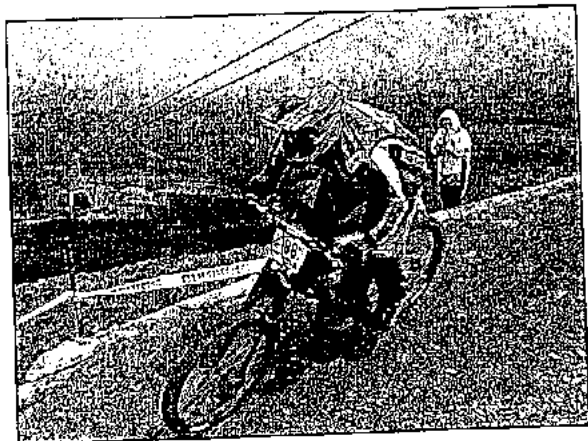
Hello - I work in crisis management - I'm a farmer.

© 2011 Westminster Events

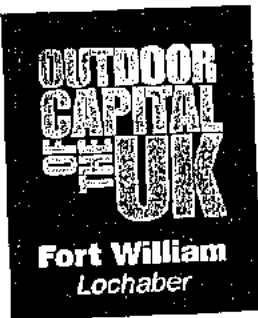


Events

- Ben Nevis
- Slu Day Trials
- Mountain Bike World Cup
- Mountain Film Festival

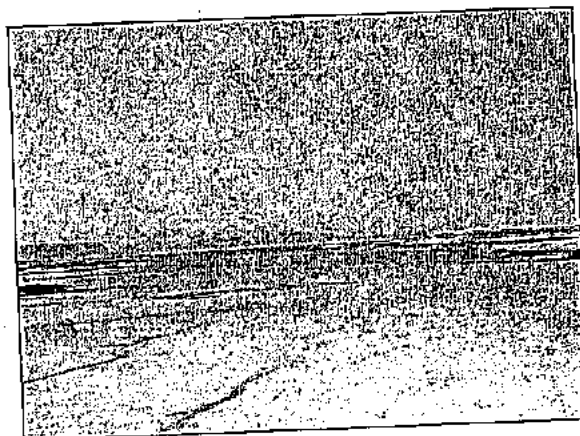


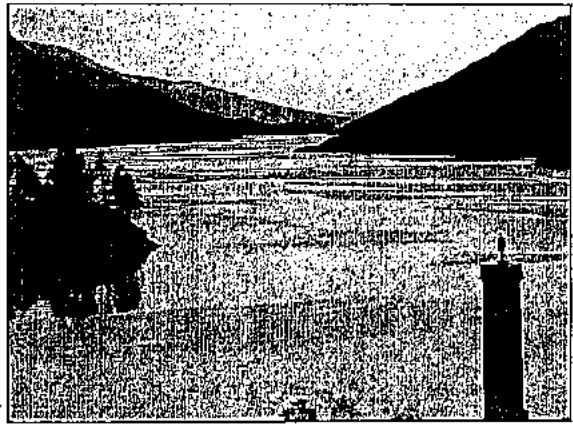
Public Meetings

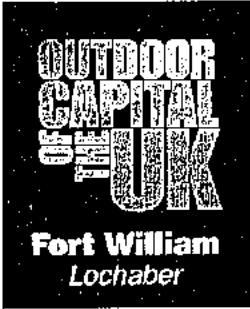


Politics
Fort William?
Fort William & Lochaber?

Private Sector
Public Agencies

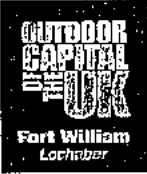







The Business Plan






Making it Happen: The Need for a Strong Destination Management Organisation

'connecting the experience, not just promoting the place'





The Vision ...


... "the best place in the UK to experience the outdoors"

The Market

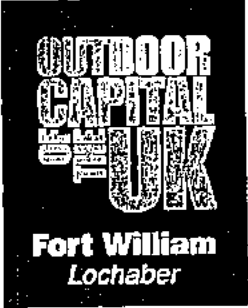
- Young Professionals
- Couples before children
- Active Families
- Couples after children

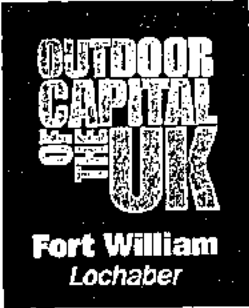


**Formation
of
Company**

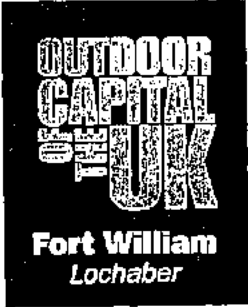
**Fort William
Lochaber**



Funding

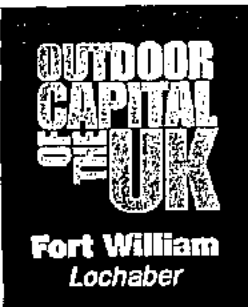


**Executive
&
Office**



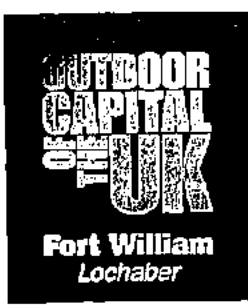
The Future

Sustainable Funding
Unity
Regeneration
Managing
Expectations



**The only
?**

Have we got the
Heart for it



Anna Trafford
info@outdoorcapital.co.uk
01397 705766
Feb.2006