

Activity Tourism
A Practical Approach

2007 Seminar Proceedings
of the
Countryside Recreation Network

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Countryside Recreation Network Seminar

'ACTIVITY TOURISM: A PRACTICAL APPROACH'

WELCOME AND INTRODUCTION

Terry Stevens
Managing Director
Stevens and Associates

This was a good day. The range of topics and speakers embraced philosophy, policy and pragmatism in relation to activity tourism. This was a well constructed day that allowed the delegates to have a basis of understanding market trends and the way that operators can respond to key issues affecting tourism in the 21st Century.

John Swarbrooke of Sheffield Hallam University set the tone for the day by challenging everyone with the proposition that the UK was no longer in the van of tourism development and innovation worldwide. John explored market trends and asked participants to think carefully about the difficulties of segmenting the markets in traditional ways.

Willie Loughheed developed this issue. He set out the way the Northern Ireland Tourist Board (NITB) is approaching the marketing of activity tourism as one of the 'winning themes' for the NITB. The importance of developing packages was identified as being a key strategy. In addition, Willie highlighted the importance of festivals and events as a catalyst for activity tourism development.

Andy Middleton has for a long time been regarded as a free thinker and leading light in the activity sector. Today Andy demonstrated that his vision for tourism transcended specific sectors and embraced a philosophy of corporate social responsibility. This was an inspirational proposition, a rallying call and a challenge that activity tourism operators are at the frontier of introducing consumers to the environment.

The Chief Gorilla of Go Ape! (Tristan Mayhew) then described the philosophy and experience provided by Go Ape! This company, established just five years ago, has proven that an imaginative product, combined with an innovative approach to management can deliver significant profile, visitor numbers and expenditure for a destination. Go Ape!'s most recent project in the Forest of Dean provided a strong example of how this goal is realised.

High Trek Snowdonia has a ten year old pedigree in meeting the precise needs of its visitors. The company has established a fine reputation based upon a highly focused philosophy and cost-effective marketing strategy.

VisitBritain (Enjoy England) provides the marketing arm to grow the value of domestic tourism markets. Amanda Smyth described the marketing strategy behind this initiative and the values-based analysis underpinning this approach. Amanda, a native of Northern Ireland, introduced delegates to some important visitor trends and perceptions. These neatly reflected and integrated with the presentation by Willie

Lougheed (Northern Ireland Tourist Board) who detailed the market and marketing opportunities being established by both Tourism Ireland and the Northern Ireland Tourism Board. Importantly, Willie reminded delegates of the importance of maintaining a market focus.

Share Holiday Village in Enniskillen is an activity centre that has recognised the potential for growing the 'English as a Foreign Language' market and combining it with an outdoor experience. The presentation by Chris Scott highlighted the importance of (a) market research and (b) the need to establish strategic alliances / partnerships to deliver the 'promise'.

Martin McCullen of the Blue Lough Group examined the importance of branding and market perceptions. His 'Blue Lough Adventure Centre' has successfully developed the corporate market following a thorough review of the asset base and market prospects.

The day's proceedings were summarised by the Chair, Dr Terry Stevens, who identified a series of rules and principles for developing a successful adventure activity business. His conclusion was that there was still significant growth potential but that in order to capture this potential products had to be innovative, based upon core brand values and high quality.

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'ACTIVITY TOURISM: A PRACTICAL APPROACH'

GROWTH OF ACTIVITY TOURISM

John Swarbrooke
Head of Centre of International Tourism Research (CiTour)
Sheffield Hallam University

Introduction

- The growth of "Activity Tourism" is just part of the rise of special interest/themed /niche tourism e.g. leisure shopping, spas, party tourism etc
- It is the result of both supply and demand side factors
- Also may be a function of the maturing of the tourism market in Europe and North America
- The majority of the outdoor activity tourism market is from so-called developed countries which have 'democratised' tourism markets
- In the emerging markets of Asia and the Middle East, where it is the economic elites only who are travelling for pleasure 'activity tourism' means spas, leisure shopping and visiting 'iconic' sites
- The \$64 Million Question is will outdoor activity tourism grow in time as these markets 'mature'

Key Supply Side Factors in the Growth of Outdoor Activity Tourism

- Destinations developing activity tourism products to increase spending, reduce seasonality and attract new segments
- The 'invention' of activities to offer new experiences to activity tourists
- The rise of specialist tour operators
- Mass market operators looking for new excursion opportunities
- The falling real cost of travel
- The Internet as a promotion and distribution tool

Key Demand Side Factors in the Growth of Outdoor Activity Tourism

- Increased disposable income in most mature tourism markets
- Sedentary lifestyles and predictable, mundane working environments
- Health concerns
- An ageing population which is staying healthy longer
- The rise of short breaks
- The media through special interest channels especially on satellite TV

Key Segmentation Issues

- Psychographic segmentation is more important than geographic or demographic
- 'Pure' activity tourists vs. 'general' tourists who 'dabble' in activity tourism
- Single activity tourists vs. those who like to try new activities

Growth Markets and Market Characteristics

- Family activity trips-parent guilt and the search for 'quality time'
- Time pressures and short intense activity experiences
- The importance of 'value for money'
- The role of status and what it means in activity tourism

Destination Marketing and Activity Tourism

- Very competitive market
- Destination brands based on activity tourism
- Focus on highest spending activity tourism markets
- Using activities to 'add value' to the destination product and encourage repeat visits

Final Thoughts....

- We need to recognise that in terms of the future of the global tourism market, Europe and North America are no longer at the cutting edge
- Asia, the Middle East, Africa and South America offer Europeans and North Americans opportunities for exotic adventures at low prices
- The exciting growth markets are in Asia and the Middle East
- We need to be innovative to ensure that Europe does not lose out to other parts of the world in the field of activity tourism

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'ACTIVITY TOURISM: A PRACTICAL APPROACH'

MARKETING BASICS IN THE OUTDOOR INDUSTRY

William Lougheed
Business and Activity Tourism Manager
Northern Ireland Tourist Board

Introduction to Activity Tourism Strategy 2005-07

- NITB's Strategic Framework for Action 2004-07
- Within The Framework 5 Winning Themes
- Activity Tourism Strategy

Overview of Strategy

- Activity Tourism product in Northern Ireland (NI) offers good variety and quality is generally good.
- A wide variety of attractive natural landscapes in which activities take place.
- NI is building an excellent reputation for activity products.
- Current market value of Activity Tourism is estimated at £34 million, approx 10% of total visitor spend.
- Investment programmes have resulted in high quality facilities – Way Marked Way Trails, National Cycle Network.

Weaknesses

- Lack of product awareness in market place resulting in relatively small numbers of out-of-state visitors.
- Lack of packages available to customers.
- Lack of collaborative approach to marketing.
- Poor statistics on participation for Activity Tourism and a major weakness for measuring future growth.

Market and Performance Tables: Year: 2004

	GB	Scotland	Ireland	Northern Ireland
Angling	4,900,000	200,000	83,000	9,400
Adventure	N.A	N.A	N.A	N.A
Cycling	6,800,000	100,000	100,000	8,600
Equestrian	2,200,000	N.A	29,000	4,000
Golf	4,900,000	230,000	134,000	30,700
Walking	91,300,000	440,000	168,000	63,000
Watersports	6,300,000	100,000	N.A	N.A

Vision Statement

"To build Northern Ireland's reputation in Activity Tourism and offer visitors outstanding experiences, capitalising on the quality of environment and facilities within which activities take place."

Key Objectives:

- 1. To use Activities to contribute to and support growth in the short breaks market.*
- 2. To target activity enthusiasts and regular amateurs in each Activity Tourism segment through targeted marketing*
- 3. To target residents of Northern Ireland both to take more active breaks themselves and to influence and market to the Visitor, Friends and Relatives (VFR) sector to increase participation of Activities.*
- 4. To develop the physical and business infrastructure, services and capacity to support future growth and deliver quality to the activity tourist.*

Key Market Sectors:

Market Segments	Geographic Markets			Consumer Markets			
	GB	ROI	NI/VFR	Dedicated Enthusiast	Regular Amateur	Occasional Active	The Family
<i>Families</i>	✓	✓	✓			✓	✓
<i>Empty-Nesters</i>	✓	✓	✓		✓	✓	
<i>Couples</i>	✓	✓	✓	✓	✓	✓	

Target Markets

- Great Britain (GB) visitors – reinforcing the regional focus of Scotland, North West & South East England, as well as cities and hinterlands where direct flights to NI are established.
- Republic of Ireland (ROI) residents – to encourage higher penetration and use of activity facilities in NI.
- Northern Ireland (NI) residents – to encourage them to take active breaks within NI.
- Visiting Friends & Relatives – to encourage repeat visits and experience the variety of activities whilst on VFR visits

Who are they?

- GB residents:
 - Empty-nesters, aged 45+, high disposable income, educated couples
- ROI + NI residents

Empty-nesters, aged 45+, cash and time rich, take regular breaks.

Couples, aged 25+, no children, relatively high disposable income, time poor.

Families, children under 10, parents work full-time, free time and disposable income limited.

What are they looking for from a holiday?

GB = Predominantly travel between April and September, bring car, hotel, guesthouse, or B+B accommodation, good restaurants, visitor attractions, historic properties.

ROI = Empty-nesters – city, coastal and rural breaks, 3* plus hotels with good facilities, good restaurants, famous attractions.

Couples – destinations yet to be experienced by their friends, 4* plus hotels with leisure/spa facilities, famous attractions.

Families – easily accessible locations, child friendly accommodation, all inclusive packages, activity rich destinations, value for money.

NI = Empty-nesters – city, rural and coastal breaks, high quality accommodation, good restaurants, leisurely sightseeing.

Couples – luxury accommodation, fine dining, quality sightseeing.

Families – locations less than 2 hours from home, child friendly accommodation, activity rich destinations, value for money.

How do they research and book?

GB = Guide books and brochures are particularly popular information sources, on-line booking is rapidly increasing.

ROI = Guide books and brochures, internet and word of mouth is key. The press in the Republic is a much used source when searching for special or last minute offers.

NI = Word of mouth, especially for families who are looking for recommendations to occupy their children. NI press/papers and the internet.

How to reach the consumer

NI = Short Breaks 'Time' Campaign, features TV + press advertising, e-marketing to consumer database.

Destination PR focuses on radio promotions, competitions, journalist familiarisation trips.

Short Breaks Brochure – 65,000 brochures are produced and distributed throughout NI.

ROI = Short Breaks 'Time' Campaign features TV, press and radio advertising, e-marketing, promotions and competitions.

Short Breaks Brochure (priced in Euro) - 25,000 brochures distributed in this market

Destination PR has a range of activity from radio and TV promotions, press releases, and feature articles to small media launches for groups of journalists to promote events and appropriate products.

Travel Trade in ROI is an important distribution channel. Activity with the Travel Trade incorporates familiarisation trips and e-marketing to 150 travel trade contacts highlighting new product developments.

Window Display – The Dublin office display brochures, leaflets and special offers and the opportunity for the industry to co-operate in campaigns, special offers and competitions.

GB = Direct Marketing. Tourism Ireland has a database of 225,000 contacts who are interested in holidays in Ireland.

Advertising – a high profile campaign featuring television, press and radio advertising raising the awareness of the island of Ireland as a holiday destination.

Destination PR focuses on print, radio and television opportunities, plus competitions and feature articles.

Travel Trade. Developing a year round programme of familiarisation visits with Great Britain's best prospect travel trade and tour operators.

Exhibitions/Shows – Attendance at a range of trade and consumer shows throughout Britain with dedicated stand space for industry partners to directly promote and sell their product to the British marketplace.

Who are the Active Tourists?

The Dedicated

Enthusiast and dedicated sports women and men. Highly visible and identifiable, needs strongly focused on the quality of their activity. They will come from a variety of backgrounds, dependent on the profile of the activity or sport

The Regular Amateur

May once have been competitors in their selected field or come late to the activity. The challenge and/or the quality of facilities will be important to the Regular Amateur. They will come from a variety of backgrounds and family circumstances.

The Occasional Active Tourist

Describes residents and visitors who may irregularly participate in a chosen activity. They can be easily put off from participating. However the availability of some activities, if not actually used by this category of visitor, may help influence them to select a destination.

The Family

Safety and security are uppermost in the mind of The Active Family Tourist. The Family will be looking for things to do that keep children entertained or that can be undertaken as a family, with different ages and abilities amongst family members. Their characteristics and motivators will otherwise be similar to the Occasional group.

How to reach The Activity Tourist:

Targeted Niche Marketing to:

- | | |
|-----------------|--------------------------|
| Dedicated | - direct mail |
| | - targeted campaigns |
| | - influencer magazines |
| | - sporting bodies/groups |
| Regular Amateur | - testimonials |
| | - reputation |
| | - product promotion |
| | - Short Break marketing |

Leisure/Destination Marketing to:

- Occasional Active - Short Breaks marketing campaign using press / radio / TV / posters / direct mail.

- Family - Consumer Website: www.discovernorthernireland.com
 - destination marketing using press / journals / radio / competitions

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'ACTIVITY TOURISM: A PRACTICAL APPROACH'

SUSTAINABLE DEVELOPMENT AND BUSINESS SUCCESS

Andy Middleton
Managing Director
TYF Adventure

Introduction

Businesses large and small are at last recognising the extent to which they are connected to the environment. We might act with surprise, though philosophers have been trying to teach us this for two thousand years "...we live not, in reality, on the summit of a solid earth, but at the bottom of an ocean of air" Thales of Miletus, c.625 – 545 BC. More recently, through the work of scientists such as James Lovelock, writing in his recent book Gaia – The Practical Science of Planetary Medicine, comments on the way that we have started to recognise the biological nature of air itself: "*the air itself is a biological product a result of active exchange of gases with living organisms.*"

Operators in the outdoor and activity tourism industry have a responsibility and opportunity to engage their customers much more closely with the elements of nature within which they play, and in doing so, teach the skills and mind sets of stewardship, care and humility.

Context

We need to focus on the importance of making carbon and our impact on the environment visible

The large fire at Buncefield Oil Depot at Hemel Hempstead in October 2005 burned, 150,000 tonnes of oil, 1/1000th of the UK's annual use – we set light to the equivalent of four of these every working day in the UK – and because we can't see the smoke, few people talk about it.

WWF's research has shown that we are currently running a 'three planet economy' – if everyone else in the world lived with the same level of consumption and waste as we do, we'd need to find another two planets for mining and rubbish disposal. As yet, we haven't found these, and despite fanciful ideas about colonising the moon, we think it makes most sense to behave as though we just have one planet to live on.

TYF's Andy Middleton also works with colleagues at think tank and consultancy Carbon Sense – some of their comparisons about impact of our lifestyles on carbon use are thought provoking. Contemplate these facts:

- Nature is capable of absorbing roughly 12.5 billion tonnes of carbon dioxide a year – around 2 tonnes for each one of the 6.3bn people on the planet.
- Our average output currently stands at approximately 4 tonnes per person
- The US per capita CO2 figure stands at 20 tonnes
- Most of western Europe's population comes in at around 10 tonnes

- China, although fast growing and power station-building, are producing 2 tonnes per capita
- Nomads in sub-Saharan Africa are often producing zero CO2

One of the challenges for business in the future is to put CO2 into the heart of economics – ECO₂NOMICS, or ECOLOMICS

The classic data from analysis of gas bubbles trapped in the ice at Lake Vostok show the trends over 400,000 years of atmospheric change. Scientists are now convinced *beyond reasonable doubt* that anthropocentric, or mankind-induced activity, is responsible for a large part of this change. The glaciers that are melting are the reservoirs of people living in mountain cities, as well as those living downstream.

David Miliband, UK Minister for the Environment talks of major change in economics *"imagine a country where carbon becomes a new currency"*.

TYF's Response to Sustainability and Climate Change

Overview

- Making waves for 20 years – innovation through, for example, pioneering of Coasteering, and establishing the World Kayak Freestyle Championships.
- Evolved in the Galapagos – we've always worked on the edge, relatively unaffected by existing practice and mind sets
- Three generations of activism – Andy Middleton's parents and grandparents, sister and brother in law have all been deeply involved in adventure.
- We're an integrated business, not an adventure business – the business is designed to support itself and the community that we're based in.

Measuring the right things

- 1% for the Planet – one percent of all sales are donated to environmental charities
- Carbon Journey – working on reducing our carbon impact by 80% in 30 years
- Green Dragon Level 3 – environmental standard
- St Davids Eco City sponsorship – financial and resource support are given by TYF
- 3% staff time for community – staff give work time to community projects as part of their professional development and TYF's CSR
- Ethical sourcing – brands such as Howies and Patagonia supply organic cottons for our shop
- Organic Approved – TYF Eco Hotel is Wales' first organic hotel
- Vegetarian Society – also approved by Veggies!

A few examples

- Organic and local food, wines & beers
- Powered by the wind – electricity supplied by Ecotricity and Good Energy
- 5 mile menus – 100% of the ingredients of some dishes come from within sight of our windmill tower

- Relaxed service from real people – we believe that the quality of welcome is more important than ticked boxes.
- We do sustainability as a business so that we have the right to teach it to others
- Based on this experience, we are advising government in Wales, UK and China on how to integrate sustainable development into their tourism industry.

Why the outdoor industry?

- We sell stories
- Between us, we reach hundreds of thousands of people a year
- Whilst experiencing the outdoors, customers are open to new experiences and ideas
- A healthy outdoor environment is our lifeblood. If we can't look after it, who will?

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'ACTIVITY TOURISM: A PRACTICAL APPROACH'

CASE STUDY: NEW PRODUCTS AND INNOVATIVE IDEAS

Tristram Mayhew
Chief Gorilla
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:

1. What is Go Ape
2. Go Ape brand values
3. 'Destination Pull Effect' of Go Ape
4. Key ingredients of 'Destination Mix'
5. Safety
6. Benefits of Go Ape
7. UK Market Potential
8. Liability and Accident Record -- is it defensible?
9. Future Innovations

1. 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 15 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 12 courses across Britain and plans to open 8 further courses across the UK and abroad by 2008, with a target of 40 courses by 2010.

2. Go Ape Brand Vision & Values

Our Vision: *'Creating adventures; encouraging others to live life more adventurously'*

Our Values:

- ◆ To doing our bit to keep *adventure* in adventure (zero risk = zero development)
- ◆ To challenge, surprise, excite.
- ◆ To encourage "I can't" to become "I can!"
- ◆ To be socially & environmentally responsible
- ◆ To create worthwhile, well rewarded jobs
- ◆ To do the right thing

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 company supports and is a sponsor of the Campaign for Adventure (<http://www.campaignforadventure.org>). The Campaign seeks to show that life is best approached in a spirit of exploration, adventure and enterprise; to influence and better inform attitudes towards risk; to build wider recognition that chance, unforeseen

circumstances and uncertainty are inescapable features of life and that absolute safety is unachievable; and to demonstrate that sensible education and preparation enable an appropriate balance to be achieved between risk & safety and achievement & opportunity.

The Go Ape 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 (now Natural England) 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.

The company is undergoing an environmental review and is researching the feasibility of reception cabins being entirely self sustaining through renewable energy (photo voltaic and/or wind turbine generation), roof collected rainwater and the use of mobile telephony. The company also aims to introduce a carbon offset facility within the booking software to neutralize the carbon costs associated with participants travel to and from the course.

3. '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 up take of Go Ape is driven by a growing national brand awareness, the recommendations to friends and family by previous Go Apers 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.

4. Key ingredients of 'Destination Mix'

Go Ape can demonstrate 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. Our first such course opened at Mallards Pike Lake in the Forest of Dean at Easter 2006. It received 19,000 participants in its first season, which was more than our most popular course (Grizedale) achieved in its first year (despite benefiting from over 400,000 annual visitors to the visitor centre).

However, 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 premium rated prices so long as they get value. If you serve very mediocre tea and coffee but charge coffee bar prices customers will remember a feeling of having been 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 are noticeably better that you always try to remember 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.

5. 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. Three of our team are cited as Experts on the European and UK Ropes Course Standards Committees respectively. The company also works closely with relevant technical organisations, with Environmental Health Officers (EHO) and with specialist Health and Safety Inspectors to ensure compliance will all relevant existing legislation, regulations and guidance. Indeed we have written assurance from our lead EHO that we do comply.

6. Benefits of Go Ape

Social Benefits:

- ◆ Imbues risk awareness, risk management and personal responsibility skills
- ◆ Physical, healthy, anti-obesity, outdoor activity (ties in with Government policy and 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
 - Increment 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

7. 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, CCFs, DofE and Princes 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.

8. 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 550,000 customers and 2,500,000 zip wire landings behind us, we have incurred a single (unsuccessful) customer claim (for a broken leg injured during a normal zip wire landing). The company carries £10 million of Employee Liability cover and £5million of Public Liability cover with AA credit rated insurers.

It may be that after many years that have witnessed 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 see 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. Support the Campaign for Adventure.

9. Innovations

Customer Database e-marketing

Go Ape has a database of c.100,000 customers' who have booked with us and who have also signed up to our e-newsletter which we send out every 6 weeks or so during our season. The customers benefit from hearing about forthcoming discounts, competitions, new courses and events. Go Ape benefits from the bookings that it directly generates, particular for the new courses we open. It is remarkable cost effective. The first issue (in April 2006) generated £28k of bookings. We were delighted. May's issue generated £175k. August's generated £317k. Each email cost c.£1000 to produce. Only 0.6% unsubscribe from each issue.

Automated Customer Surveying

The next working day after their visit to a Go Ape course we send each customer who made the booking a customer satisfaction survey by email. We want to hear what we are getting right and more importantly what we are getting wrong.

We survey the whole experience, not just at the course, but our call centre and the online booking process too. We ask 15 questions (see appendix 1).

Over 50% voluntarily respond. We use the data to spot areas where we can improve and to be able to reward teams and individual staff that get mentioned as having done a great job in the free response sections. The teams do not think it is big brother and they enjoy knowing that they are doing a great job as verified by their customers. The cost of this is 5p per email address. Each Booker represents on average 5 customers, so in fact the cost for this invaluable data is just 1p per customer.

Google Adds

Google Pay Per Click adds are very simple to set up and a cost effective way of bringing new customers to your business. (Visit <http://adwords.google.com/select/Login> and follow the advice).

You create ads and choose keywords, which are words or phrases related to your business. When people search on Google using one of your keywords, your ad may appear next to the search results. You pay 7p per click through to your site

We trialled this in 2006. We had 61,500 clicks through from our Google adds, which we were able to track and resulted in 621 online bookings. (Other bookings may have been made if they deciding to book by phone). These online bookings had an average value of £108 per booking, generating £67,000 of booking revenue for a total cost of £4280. We were impressed!

Time Pursuit

We commissioned a state of the art leisure management system to run our bookings and back end financial system. It is called Time Pursuit and was delivered by Rural Frontiers Limited.

Key benefits of Time Pursuit:

- Enterprise system designed for activity booking and management
- Totally web based application – only requires PC and broadband without a need for hardware such as servers.
- Designed specifically for time-rationed perishable leisure activities/services
- Permits up-sell & cross-sell of ancillary services & merchandise
- Flexible to accommodate multi-site, multi-activity and franchise businesses
- Integrated website and content management system
- Retail & organisational selling, including corporate packaging
- Shadow carbon currency with carbon offset built into shopping basket
- 100% accountability of web, call-centre and on-site sales
- Delivers cross-organisation communication and productivity
- Dashboard for the business, offering financial/management control

In short it will make us a much more efficient business and will allow us to cope with planned future growth.

Go Ape is proud to be a fast growing innovative leisure activity and brand enjoying increasing national recognition for quality. We will continue to innovate and strive for excellence.

Countryside Recreation Network Seminar

'ACTIVITY TOURISM: A PRACTICAL APPROACH'

CASE STUDY: MARKETING SUCCESSFULLY ON A BUDGET

Mandy Whitehead
Partner
High Trek Snowdonia

Understand the difference between Marketing & Promotion

- Product
- Place
- Price
- Promotion

High Trek Snowdonia

- Started in 1986
- Late gap year
- Life style choice
- What to do?

The Product

- Mountain Holidays –USP?
- Tough days -Soft nights
- Professional instruction
- Chalet party atmosphere
- Everything included

Place

Geographically – Snowdonia

Within the Market

Adults – singles/pairs, non-macho - fun!

Price

- Competition - direct-indirect
- Costs – eye on costs does not mean be cheap!
- Market tolerance/perceptions
- Testing - researching

The Product

- Mountain Holidays –USP?
- Tough days -Soft nights

- Professional instruction
- Chalet party atmosphere
- Everything included

Promotion

- Don't forget to allow time and/or money
- PR news or travel sections
- Print/broadcast

New Business

- Advertising – schedule - budget monitoring - creative content branding
- Leaflets/brochures

Relationship Building

- Mailings post – e mail
- Web Marketing

Website is NOT an online brochure

- Construction – clear navigation
- Context - relevance
- Content – reliable useful
- Control - updated
- Communication – search engines

Remember Ps and Cs!

- Product
- Place
- Price
- Promotion
- PEOPLE

Countryside Recreation Network Seminar

'ACTIVITY TOURISM: A PRACTICAL APPROACH'

COUNTRYSIDE, COAST AND NATURE VISITBRITAIN'S APPROACH TO ACTIVITY TOURISM

Amanda Smyth
Domestic Marketing Manager
Enjoy England

About VisitBritain and Enjoy England

Visit Britain is the official tourism marketing agency for Britain and holds two specific remits: to market Britain internationally and to market England to the British.

Enjoy England was established in 2003 as the domestic marketing arm of VisitBritain. Our remit is to increase the value of the domestic tourism market by encouraging the British to take more short breaks, day trips and holidays in England. In recent years Enjoy England has also begun to market England as a brand in its own right within four near European markets of: Ireland, France, the Netherlands and Germany.

Enjoy England Target Markets

Value based segmentation

Our strategy recognises that England will never be all things to all men, and that we need to identify and concentrate upon those groups of people most likely to offer real market growth. So since our inception in April 2003 we have been working hard to define who exactly England's customers are, and what makes them tick. We're using these insights to shape our own marketing programmes, and we believe our partners will also find them useful.

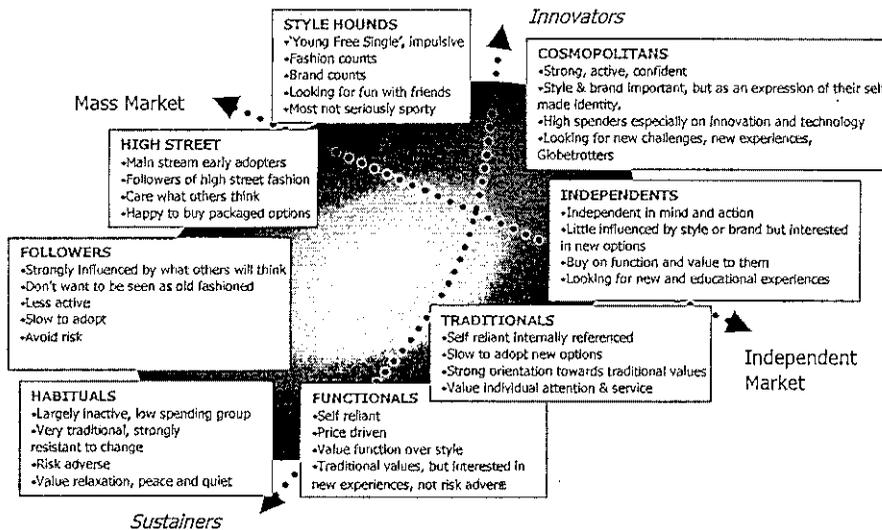
Enjoy England uses a values based segmentation model to identify what groups of people we should aim our marketing messages at. This segmentation method recognises that there are many criteria that actually determine customer behaviour and seeks to identify the issues that matter most to the segment. These multi-dimensional criteria encompass attitudes, beliefs and values. By getting a better understanding of these criteria, we are starting to build up a much deeper insight into what *really* underpins customer decisions and actions.

Our segmentation model – which was developed for us by Arkenford – considers two fundamental axes of human nature. The first of these is the extent to which a person is internally or externally referenced, and the second whether they can be classed as innovators or late adopters.

Using these axes, we have been able to group the British holidaying public into eight main segments as the chart below depicts. Like most organisations, our marketing budgets are limited. We are therefore focusing on three specific market segments for the next three years. The choice of segments was based on the frequency with which the groups take

short breaks and their likelihood to be influenced by the Enjoy England marketing message.

Describing Customer Groups



Additional segmentation variables

Whilst our remit is to market the whole of the tourism offer, i.e. day trips, short breaks and longer holidays, our primary target market tends to be the short breaks market as it is here we have identified the biggest scope for growth.

In terms of traditional socio-demographic segmentation we predominantly target a more affluent, ABC1 demographic where disposable income does not prohibit one or more short breaks per year. Across the campaign activity we target a wide range of age and life stage segments and the key differentiating segment tends to be the Ark Leisure segment.

Given our remit to maximise return on investment and to spread the impact of our activity throughout the nine regions of England we do not tend to focus on 'niche' markets but on creating demand amongst mainstream markets. Our partner regions and destinations within England work to target niche markets where appropriate.

Enjoy England Marketing Campaigns

Brand marketing

Much of our marketing activity concentrates on raising consideration levels of England as a destination for a short break or holiday. This includes high profile television and national media activity to convey the destination brand values of 'real', 'fun' and 'indulgence'.

Thematic campaigns

Thematic campaigns support our brand campaign and act as acquisition channels. For 2007/8 these campaigns include: Just Relax, Family Fun, Rural Escapes and City Breaks.

Marketing 'Outdoor England' and Activity Tourism

Customer demand and motivation

Enjoy England carried out a major research study in 2004 to understand motivations and satisfaction drivers amongst our target markets. This identified that the rural/outdoor aspect of the English tourism offer was seen as a key strength and driver of satisfaction. In particular the unspoilt countryside, facilities for walking, rambling and hiking and opportunities to see wildlife in it's natural habitat were seen as important by the target market.

We used this insight to develop the Outdoor England campaign 2005/6 which sought to promote the 'outdoors' as a tourism product to appeal not just to a niche market of outdoor enthusiasts, but to the wider target market.

Outdoor England Campaign

The year-long campaign launched in July 2005 and aimed to highlight the depth and breadth of outdoor experiences in England and to increase visits amongst our target segments, particularly outside of the summer season. An objective of 13:1 return on investment was set.

The main themes and messages within the campaign were:

Your Outdoors - walking, cycling, riding, farms, National Parks

Wild Outdoors - bird-watching, other wildlife spotting, camping & caravanning, marine life, nature reserves

Waterside - sailing, surfing, seaside, inland waterways, fishing, maritime heritage, seafood

Extreme Outdoors - climbing, skydiving, abseiling, long-distance hiking and mountain biking

An 84 page brochure and dedicated website were developed as campaign fulfilment and the campaign included integrated marketing activity across national press and targeted publications, national media promotions, field marketing at major consumer exhibitions, CRM activity to Enjoy England's database and a national PR campaign.

Visitors to the website could search through a database of activities and places to visit throughout the whole of England and were signposted to our regional destination partners for more specific information on activities available in each area.

Campaign evaluation is underway but interim results suggest that the campaign has performed well and is on target to over-reach the initial return on investment target.

Future plans

In 2007 our plan is to further develop marketing of the outdoor and activity product through a new campaign – Rural Escapes. This will encompass the themes of the previous outdoor campaign and in addition promote coastal landscapes, market towns and villages, local food, sustainable tourism and a wider range of outdoor and rural products.

Partnership Working

VisitBritain and Enjoy England work with a wide range of partners from across the public and commercial sector. We have established a Countryside, Coast and Nature sector club comprised of private and public organisations that have a key stake in countryside and rural tourism. The group meets regularly to discuss how we can best promote the British countryside & coastal experience to both domestic and international visitors and to share best practice and ideas.

Countryside Recreation Network Seminar

'ACTIVITY TOURISM: A PRACTICAL APPROACH'

INTERNATIONAL BUSINESS

Chris Scott
Marketing Officer
Share Holiday Village

Introduction

The aim of this report is to demonstrate through a Case Study - How the Share Holiday Village (Share) broke into the English Language School Market. The report will highlight the background of Share, how international business has played a small role within the organisation since its inception and how the peace process along with other external factors acted as a catalyst to allow Share to gain a foot hold in the market. Successful and unsuccessful marketing strategies used by Share will be explained, highlighting learning points from each.

The report will conclude with Share's current position in the market and indicate aspirations for the future.

Background

Share is Ireland's largest multi-activity centre situated on the shores of Upper Lough Erne in Co. Fermanagh, Northern Ireland. The centre was established as a Registered Charity in 1981 with the ethos of promoting inclusion between disabled and non disabled people. From small beginnings the centre has grown to a 65 acre site welcoming on average 10,000 residential guests and 5,000 day visitors per year.

Although Share's core market is from within Ireland, international business has always been present. Share organised its first International Summer School in 1983 attracting mainly disabled visitors from France. Throughout the 80s and early 90s a twin scheme with a centre in La Baule, France operated, with Share sending local Fermanagh children to France at Easter and with a French group returning to Share during the Summer. This programme came to an end due to the repeated terrorist attacks in Northern Ireland.

Significant improvements in peace though allowed Share to set up a three year partnership with the French Civil Service, offering activity residential for children. A successful programme ran in 1997 but in 1998 tragedy struck. During the 1998 residential, the Omagh Bomb (20 miles from the centre) killed 29 people. Following calls from worried parents the group returned home and cancelled the third year of the project. Tragically two Spanish tourists who were in Ireland on a English Language exchange were killed which in turn meant Tour Operators understandably became very reluctant to send groups to Northern Ireland. Disillusioned Share decided not to concentrate on international marketing until external factors allowed.

New Beginnings

Optimism returned in 2004 due to a number of external factors. The peace process in Northern Ireland began to gather pace making Northern Ireland a more attractive destination. The Northern Ireland Tourist Board (NITB) had also identified Activity Tourism as a "Winning Theme" in their Strategic Framework for Action 2004 -2007, allowing activity providers like Share a more direct point of contact.

The optimism was heavily reinforced following a trip to Dublin Airport during July 2004. Whilst waiting to collect a group of ex-university friends from their delayed flight I watched literally thousands of European children arrive to be met by representatives. After a brief conversation with one of the awaiting reps I realised these children were all travelling for two week English Language courses in the Republic of Ireland (ROI). After talking in detail with the rep I realised Share could offer exactly the same programme.

On return to the office a large period of desk research was undertaken. This identified a massive and well organised market in ROI but nothing in Northern Ireland. Although the ROI market was regulated by the Department of Education and Science, no such regulation was necessary in Northern Ireland. Therefore with no regulation and no large providers already in the Northern Ireland market there was no significant barriers to entry.

Strategies

Share decided to concentrate on attracting groups rather than individuals as with a limited marketing budget it would be more cost effective to target Tour Operators and teachers rather than individual households. Early July was identified as a lower occupancy period in which to try to attract these groups. The main concentration would be on France, Spain and Italy as these were the countries already sending groups to ROI.

Share formed a partnership with the newly formed Fermanagh Lakeland School of English (FLSE) who had a similar idea to enter the potentially lucrative market. Share would provide the accommodation and activities whilst FLSE would teach English Language. A joint marketing approach created an information pack with sample prices, programmes etc. These were sent out to various Tour Operators via Tourism Ireland (who are responsible for marketing Northern Ireland Internationally).

This approach did not yield a great response and the mail shot was deemed unsuccessful. The FLSE and Share partnership dissolved. However Share decided to try another medium – the NITB "MEET THE BUYER" Workshop, May 2005. This event is best described as "speed dating" with Tour Operators as it provides up to 20 face to face appointments in one day.

Breakthrough

The face to face contact proved vital, and a French Tour Operator made a pilot booking for July 2006. After a positive result in 2005 we returned to the NITB "MEET THE BUYER" Workshop in May 2006. The learning points from 2005 allowed us to be better prepared with more research carried out, clearer objectives, more competitive packages and an enhanced reputation following our pilot booking.

Negotiations at the 2006 Workshop and follow up familiarisation trips led to numerous bookings from French and Italian Tour Operator for Easter and Summer 2007. Share also received numerous enquiries from European Tour Operators not previously met at the workshops. This certainly marked Share's breakthrough into the market.

Future

Share obviously wishes to develop this opportunity in the future whilst not displacing our regular customers. It is the intention to increase our range of Tour Operators and increase shoulder season bookings around Easter and Halloween.

Learning Points

- Research the market
- Personal contact with Tour Operators is a must
- Arrange familiarisation trips for Tour Operators to visit your facilities
- Do not worry about the language barrier, all international Tour Operators speak English (embarrassing but beneficial)

Countryside Recreation Network Seminar

'ACTIVITY TOURISM: A PRACTICAL APPROACH'

DOING THE BASICS WELL!

Martin McMullan
Business Director
High Point

The presentation began with a brief overview of The Highpoint Group and the inception of The Bluelough Adventure Centre, with particular emphasis on the extent of the diversification involved from the core business into adventure tourism.

Initially formed in 1996 the business, Highpoint focused on the use of adventure activities as a medium for the development of individuals and teams; with specific emphasis on a new and improved level of service within the design and delivery of such adventure programmes. The success of the business was quickly evident from the demand for the services not only within the initial geographic target but from right across Ireland and into the UK.

The overall structure of the business was a simple format and to maintain the standards of service, the level of business was capped with average figures as follows:

- 50 events per year
- 30 clients per year
- 2800 participants per year
- 5-500 participants per event

Figures are based upon Highpoint records 1996 – 2003 inclusive.

The business focuses on a key client base and develops through repeat business and referrals within the corporate sector.

However, over a period of time, it became obvious due to demand that there was a serious gap in the delivery of adventure activities to the general public. Although the core activities were similar, the actual business was substantially different and was initially a step beyond what was deemed as comfortable for the business. In turn the business avoided the delivery of pure adventure activities to the public until it became abundantly clear that the gap that existed was vast enough to justify further investment and hence business growth.

In 2003 based upon ongoing research the business diversified and opened an Adventure Centre, Bluelough, with the purpose of delivering adventure activities to both the Domestic and Tourist market. Initially it was proposed to run a test period and to utilise the existing structure of the business, however the demand was so high that vast changes were required within an extremely short period of time.

With a very much temporary structure the throughput exceeded all expectations with the average level of business as follows;

- 957 events per year
- 1023 clients per year
- 11043 participants per year
- 1-500 participants per event

Figures are based upon Bluelough records 2003 – 2006 inclusive.

As with the core business, the dramatic growth was fuelled by extensive repeat business and referrals, with demand for our centres services coming from our primary delivery area of the Mourne region, across NI and even into the ROI.

The key differences between the core business and the diversification where considerable and fall into three key areas;

- Volume Increase
- Dealing with the Public
- Volatile Market

The key consequence was that for the first two years of trading the centre failed to break even and just breaking even in year three.

The overview was followed by a synopsis of the strategies employed within the growth of the Bluelough Adventure Centre, especially those above and beyond the generic strategies employed within the growth of the core business that are specific to adventure tourism as follows;

- Lead generation
- Conversion rate
- Average sale value
- Number of transactions

This was followed by an in depth look at the strategies employed to tackle the basics of the growth of the Bluelough Adventure Centre with specific relevance to the above four key areas.

Lead Generation:

- Northern Ireland Tourist board – Be a Tourist at Home Campaign
- Local Banner Advertising – Primarily using key access points to the locality
- Regional Tourism Partnership membership – across all the RTP's in NI

Conversion Rate:

- Overall Business Image – previously too sophisticated to attract the non-corporate market
- The establishment of a dedicated Customer Services Team

- Creating a simple booking system including the acceptance of credit cards and other currencies

Sale Value:

- Increased Prices – an average of 10% across our range of activities
- Provision of Packages – making our product/service convenient
- Offer of 'Bolt On' services – increasing potential spend and providing additional services such as transport

No. of Transactions:

- Impress – when a lead becomes business, be sure to impress and deliver what we have offered
- Inform – ensure the customer leaves with a greater knowledge of the business to encourage return for a new activity or the same activity at a new level
- Keep in touch – create a customer database and develop an e-zine/mailshot to keep customers involved in developments, offers etc

To support the above strategies additional investment in excess of £500,000 was required to include the following key areas;

- Customer Service Facility (non-residential centre) - £350,000
- Resources (activity specific equipment) - £100,000
- IT - £27,000
- Training - £21,000

The presentation concluded with a focus on the benefits realised by all involved in the Bluelough Adventure Centre, the business owners, the customers, the employees and the industry as a whole.

In basic terms, the business has turned into a profitable entity delivering an excellent service with a vast potential for future growth from what has become a great business foundation.

Countryside Recreation Network Seminar

'ACTIVITY TOURISM: A PRACTICAL APPROACH'

**ESSENTIAL ELEMENTS TO THE SUCCESS
OF ACTIVITY TOURISM BUSINESSES**

Dr Terry Stevens
Managing Director
Stevens and Associates

The 17 Immutable Rules of a Successful Activity Business

- | | | |
|----------|---|--|
| Rule 1: | Success Begins With a Good Architect | - The rule of planning |
| Rule 2: | Relationships Require More Than One Person | - The rule of partnerships |
| Rule 3: | First Impressions Really Are Lasting Impressions | - The rule of perceived value |
| Rule 4: | Real Men Don't Ask For Directions | - The rule of wayfinding |
| Rule 5: | The Receptionist Does More Than Answer The Phone | - The rule of frontline staff |
| Rule 6: | If It Stinks, Use Deodorant | - The rule of turning negatives into positives |
| Rule 7: | Insanity Has Its Own Rewards | - The rule of being unique |
| Rule 8: | Be Worthy Of A Standing Ovation | - The rule of being the best |
| Rule 9: | Don't Stand Still | - The rule of innovation |
| Rule 10: | The Shortest Distance Between Two Points Is A Good Time | - The four times rule |
| Rule 11: | Sell The Rapids, Not The River | - The rule of selling the experience |
| Rule 12: | Make It Easy To Tell Your Sheep From My Sheep | - The rule of branding |
| Rule 13: | Photos Are Worth A 1,000 Words | - The rule of 'wow' photography |
| Rule 14: | Bragging Is More Effective When Done By Someone Else | - The rule of PR |
| Rule 15: | Critical Mass Is Not Just A Religious Experience | - The rule of convenience |
| Rule 16: | Destinations Do Matter | - The rule of geography |
| Rule 17: | The More You Give The More You Receive | - The rule of CRS |

APPENDIX A

**Activity Tourism: A Practical Approach
Stranmillis University College, Belfast
7th February 2007**

PROGRAMME

- 09.00 *Registration and refreshments*
- 9.30 **Welcome by Chair - Terry Stevens, Stevens and Associates**
- 9.40 **Growth of Activity Tourism**
John Swarbrooke, Sheffield Hallam University
- 10.05 **Marketing Basics in the Outdoor Industry**
William Loughheed, Northern Ireland Tourist Board
- 10.30 **Sustainable Development and Business Success**
Andy Middleton, TYF Adventure
- 10.50 *Refreshments*
- 11.15 **Case Study: New Products and Innovative Ideas**
Tristram Mayhew, Go Ape
- 11.35 **Case Study: Marketing Successfully on a Budget**
Mandy Whitehead, High Trek Snowdonia
- 11.55 **Question and Answer Panel Session**
- 12.25 *Lunch*
- 13.25 **Countryside, Coast and Nature - VisitBritain's Approach to Activity Tourism**
Amanda Smyth, VisitBritain
- Success Stories from Northern Ireland**
- 13.50 **International Business**
Chris Scott, Share Centre
- 14.05 **Doing the basics well!**
Martin McMullen, High Point
- 14.20 *Refreshments*
- 14.45 **Essential Elements to the Success of Activity Tourism Businesses**
Terry Stevens, Stevens and Associates
- 15.10 **Question and Answer Panel Session**
- 15.40 **Summary (Chair)**
- 16.00 **CLOSE**



APPENDIX B



BIOGRAPHIES OF SPEAKERS

**Activity Tourism: A Practical Approach
Stranmillis University College, Belfast
Wednesday 7 February 2007**

CHAIR

**Dr Terry Stevens
Managing Director
Stevens and Associates**

Dr Terry Stevens is Managing Director of the international leisure and tourism consultancy, Stevens & Associates. Whilst working as Professor of Leisure, Tourism and Health Care Management in Swansea in 1990 he established the SAiL – the Safety in Leisure Research Unit. The work of SAiL informed the establishment of the Adventure Activities Licensing Authority of which Terry is a Board Member. He has worked in over 25 countries worldwide and has recently worked as Specialist Advisor to the Northern Ireland Tourist Board.

SPEAKERS

**John Swarbrooke
Head of Tourism Group
Sheffield Hallam University**

John is a Principal Lecturer in Tourism Management and Head of Tourism Group at Sheffield Hallam University, and is also acting head for the Centre for International Tourism Research (CiTour). John's main responsibilities include managing the team of 12 tourism specialists in the Faculty of Organisation and Management, teaching tourism modules to undergraduate and postgraduate students; research and publication; consultancy in tourism; developing international partnerships and collaborations and supervising research degree students and postgraduate dissertation students. Prior to joining the University in 1990, John worked at management level in the international tourism industry for ten years, in the destination marketing and tourist attraction sectors.

**Willie Lougheed
Business and Activity Tourism Manager
Northern Ireland Tourist Board**

Willie Lougheed has more than thirty years experience in the tourism industry. He is currently Business and Activity Tourism Manager at the Northern Ireland Tourist Board (NITB). He has worked in business tourism for the last two years and has more recently taken on responsibility for activity tourism which concentrates on golf, walking, cycling and special interest activities. He is currently focusing on developing relationships with activity tourism groups across Northern Ireland and beyond. In his role as Business Tourism Manager, Willie was responsible for the delivery of the first NI Business Tourism Expo in September 2006.

Previously Willie spent fifteen years as head of the NITB's Quality Assurance Division. During this time he was responsible for the introduction of new classification schemes across all the accommodation categories in Northern Ireland.

**Andy Middleton
Managing Director
Twr Y Felin**

Andy Middleton is an eco-entrepreneur, inspired by social responsibility, leadership and innovation. He has worked for 20 years as a consultant, facilitator and advocate with governments, international companies and NGOs to enable change and help his clients turn vision into reality. His on-going research and learning as geographer, ecologist and anthropologist combine with his experiences as founder and Managing Director of the award-winning TYF Group to create a powerful and potent mix of reference points and questions that challenge the ground rules of sustainable development, for businesses and communities. Andy works internationally with clients that include the Welsh Assembly Government, the China Executive Leadership Academy in Shanghai, American Express, Compass, the Carbon Trust and Rathbones Greenbank. He lives with his family on the coast in St Davids, where he is building an eco house overlooking islands, bays and the Atlantic Ocean.

**Tristram Mayhew
Chief Gorilla
Go Ape!**

Tristram founded Go Ape! in 2002 with his wife Rebecca. Go Ape! is a multi-award winning high wire forest adventure. 500,000 gorillas and baboons have now trekked from tree to tree through the forest canopy across rope bridges, tarzan swings and zip slides. It offers fun, laughter and adventure high up in the trees. The company currently has 12 sites across Britain and employs over 200 people.

Tristram was sponsored through University by the Army and left as a captain in 1997. He spent 5 years with multinationals before taking the plunge to go it alone.

Go Ape aims to keep adventure in Adventure. It sees itself as an eco-educational experience. Participants absorb life broadening risk assessment and risk management skills, whilst having a naturally thrilling time. It strives to be an environmentally and socially responsible activity and company, based on the long term health of the forest.

The Go Ape vision: "Creating adventures; encouraging others to live life more adventurously"

**Mandy Whitehead
Partner
High Trek Snowdonia**

Following 10 years in mainstream advertising and marketing for multinationals, Mandy escaped the Friday night exodus up the M1 and moved to North Wales. Here, with husband Ian, she started High Trek Snowdonia offering mountain holidays and courses.

Their breaks are run with the underlying philosophy of combining the high standard of professional instruction and equipment of a national mountain centre with the friendliness and hospitality of a chalet-style "house party".

This philosophy, combined with a focused marketing approach and professional handling of lower cost promotion opportunities such as PR and web opportunities have led to the high degree of success of the operation

She is also a Summer Mountain Leader, a director of Snowdonia-Active, an official Wales Tourist Board Blue Badge Guide, a Welcome Host Trainer, a "Dynamo" role model and a member of the Local Access Forum.

**Amanda Smyth
England Domestic Marketing Manager
Enjoy England (Visit Britain)**

Enjoy England is the domestic marketing arm of VisitBritain which seeks to grow the value of the domestic tourism market by encouraging people to spend more on tourism throughout the English regions, throughout the year. As Domestic Marketing Manager Amanda leads on all marketing campaign activity within the UK, with an annual budget of over £4m.

Previous campaigns have included a successful 'Outdoor England' campaign, encouraging people to participate in activities in the rural landscape. Amanda's team also manages the VisitBritain Countryside, Coast and Nature Sector Club – a national network of rural tourism businesses sharing information and best practice.

Amanda began her career in marketing at British Airways before moving into destination marketing, where she has experience of delivering tourism marketing campaigns at both a local and regional level, most recently as Marketing Manager at Yorkshire Tourist Board. She holds an MSc in Tourism and an IDM Diploma in Interactive and Direct Marketing.

**Chris Scott
Marketing Officer
Share Holiday Village**

Chris Scott graduated from the University of Strathclyde, Glasgow with a BA (Hons) Degree in Marketing and Tourism in 2001. Having worked as a Sailing Instructor at the Share Holiday Village each summer since 1998 he obtained full time employment as a Senior Staff Instructor in February 2002.

In November 2003 he was appointed Marketing Officer for the Share Holiday Village with responsibility for research, design and implementation of the Share Holiday Village Marketing Strategy. Chris also sits on the Northern Ireland Tourist Board Activity Tourism Working group.

**Martin McCullen
Business Director
Highpoint Group**

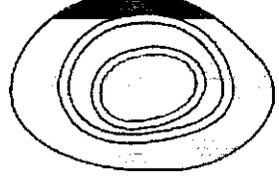
Martin is the Managing Director of The Highpoint Group who both own and run the Bluelough Adventure Centre among other adventure based businesses.

Having developed a career in Instructing and Coaching adventure sports from a personal passion, Martin entered the into the business world at the age of 22 while completing a BA Hons in Management and Business Studies at Queens University Belfast. Initially working primarily in the corporate adventure market under the Highpoint brand, Martin not only developed a business unique to Northern Ireland but one that created demand throughout the UK and Ireland. The business formed a strong foundation for future developments to include the diversification into adventure tourism some 7 years later with the creation of the Bluelough Adventure Centre.

Having retained a passion for both adventure and business, Martin continues to enjoy the challenge posed by an increasingly exciting industry.

Other current roles include board member of the Mourne Heritage Trust Board of Trustees, Member of the NI Activity Tourism Forum and Working Group, Member of the Mourne Heritage Trust Sustainable Tourism Forum and member of the Mourne Branding initiative Advisory Committee.

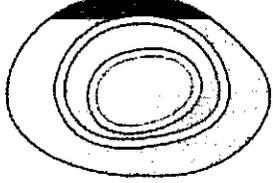
APPENDIX C



Countryside Recreation Network

Activity Tourism: A Practical Approach Delegate List

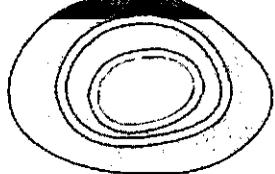
Neil	Armstrong	Lough Key Forest and Leisure Park
Val	Baker	Blackdown Hills Business Association
Gemma	Blackhall	CSA Group Ltd
Martin	Bradley	Strabane District Council
Max	Bryant	Sperrins Tourism Ltd
Fiona	Bryant	North Sperrins Heritage Trail
Matthew	Bushby	Mourne Heritage Trust
Christine	Butler	Ballymena Borough Council
Kathryn	Callaghan	Countryside Access and Activities Network
Emma	Campbell	Visit Scotland
Louise	Clarke	Armagh and Down Tourism Partnership
Kathleen	Conlon	Department of Culture, Arts and Leisure
Jim	Edgar	Belfast City Council
John	Erwin	Country Pursuits
Aideen	Exley	Countryside Access and Activities Network (N.I.)
Caro-lyne	Ferris	Countryside Access and Activities Network (N.I.)
Linda	Foy	Larne Borough Council
Anne	Freund	Bradford College
Anne-Marie	Gallagher	Creggan Country Park
Carole	Hall	Carrickfergus Borough Council
Nigel	Hill	Dungannon & South Tyrone Borough Council
Mervyn	Hill	Council for Nature Conservation and the Countryside
Heather	Hoffman	Countryside Access and Activities Network (N.I.)
Karen	Hope	Northern Ireland Tourist Board



Countryside Recreation Network

Activity Tourism: A Practical Approach Delegate List

Jennifer	Ingram	North Down Borough Council
Anne	Inskip	The National Trust
Andrew	Kennedy	Lisburn City Council
Michelle	Kozomara	British Waterways
Tim	Kyne	Kippure Estate Ltd
Della	Kyne	Kippure Estate Ltd
Michael	Lynch	Fingal County Council
Suzanne	Martin	Forest Research (Forestry Commission)
Mike	McClure	Sports Council for Northern Ireland
Mary	McGee	Dungannon & South Tyrone Borough Council
Maeve	McKeever	Faillte Ireland
Patricia	McMullan	Ballymena Borough Council
Ainsley	McWilliams	Larne Borough Council
Stephen	Millar	Tollymore Mountain Centre
Ann	Moreland	Armagh and Down Tourism Partnership
Colin	Murphy	Wicklow Uplands Council
Fiona	Murray	Forestry Commission Scotland
Caroline	Nolan	Strangford Lough Management Advisory Committee
Jennie	Owen	The National Trust
Gareth	Patterson	Craigavon Borough Council
Matt	Peach	Countryside Access and Activities Network
Roger	Pollen	BASC Northern Ireland
Clare	Quinn	Limavady Borough Council
Chris	Scott	Share Holiday Village

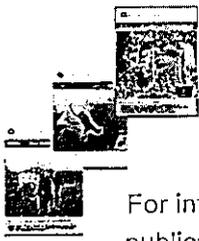


Countryside Recreation Network

Activity Tourism: A Practical Approach Delegate List

Chris	Smyth	Chris Smyth Outdoor Activities
Karen	Steele	Antrim Borough Council
Declan	Turnbull	Mayo County Council
David	Vincent	DV Diving
Zoe	Warrick	Larne Borough Council
Siobhan	Weir	Skillsactive
Ian	Whitehead	High Trek Snowdonia
Andrew	Wilkinson	British Waterways
Heather	Wilson	Down District Council

APPENDIX D



For information on seminars,
publications and to download
the latest copy of the journal:

VISIT OUR WEBSITE

www.countryside recreation.org.uk

The Growth of Activity Tourism

John Swarbrooke

CITouR-Centre for International Tourism Research
Sheffield Hallam University



- The growth of "Activity Tourism" is just part of rise of special interest/themed /niche tourism e.g. leisure shopping, spas, party tourism etc
- It is the result of both supply and demand side factors
- Also may be a function of the maturing of the tourism market in Europe and North America



- The majority of the outdoor activity tourism market is from so-called developed countries which have 'democratised' tourism markets
- In the emerging markets of Asia and the Middle East, where it is the economic elites only who are travelling for pleasure 'activity tourism' means spas, leisure shopping and visiting 'iconic' sites
- The \$64 Million Question is will outdoor activity tourism grow in time as these markets 'mature'



Key Supply Side Factors in the Growth of Outdoor Activity Tourism

- Destinations developing activity tourism products to increase spending, reduce seasonality and attract new segments
- The 'invention' of activities to offer new experiences to activity tourists
- The rise of specialist tour operators
- Mass market operators looking for new excursion opportunities
- The falling real cost of travel
- The Internet as a promotion and distribution tool

Key Demand Side Factors in the Growth of Outdoor Activity Tourism

- Increased disposable income in most mature tourism markets
- Sedentary lifestyles and predictable, mundane working environments
- Health concerns
- An ageing population which is staying healthy longer
- The rise of short breaks
- The media through special interest channels especially on satellite TV

Key Segmentation Issues

- Psychographic segmentation is more important than geographic or demographic
- 'Pure' activity tourists vs. 'general' tourists who 'dabble' in activity tourism
- Single activity tourists vs. those who like to try new activities

Growth Markets and Market Characteristics

- Family activity trips-parent guilt and the search for 'quality time'
- Time pressures and short intense activity experiences
- The importance of 'value for money'
- The role of status and what it means in activity tourism

Destination Marketing and Activity Tourism

- Very competitive market
- Destination brands based on activity tourism
- Focus on highest spending activity tourism markets
- Using activities to 'add value' to the destination product and encourage repeat visits

Final Thoughts....

- We need to recognise that in terms of the future of the global tourism market;
- Europe and North America are no longer at the cutting edge
- Asia, the Middle East, Africa and South America offer Europeans and North Americans opportunities for exotic adventures at low prices
- The exciting growth markets are in Asia and the Middle East
- We need to be innovative to ensure that Europe does not lose out to other parts of the world in the field of activity tourism

And Finally.....

- Hope I have helped set the scene for the rest of the conference

*Enjoy the rest of the day
Thank you for listening*

activities tourism

Marketing Basics In The Outdoor Industry

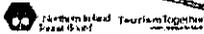
Willie Lougheed
Northern Ireland Tourist Board
7th February 2007



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Introduction to Activity Tourism Strategy 2005-07:

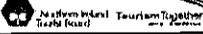
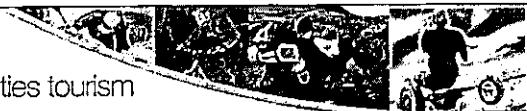
- NITB's Strategic Framework for Action 2004-07
- Within The Framework 5 Winning Themes
- Activity Tourism Strategy




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Overview of Strategy
Strengths and Weaknesses

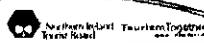
- Activity Tourism product in NI offers good variety and quality is generally good.
- A wide variety of attractive natural landscapes in which activities take place.
- NI building an excellent reputation for activity products.

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Overview of Strategy

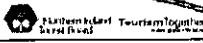
- Current market value of Activity Tourism is estimated at £34 million, approx 10% of total visitor spend.
- Investment programmes have resulted in high quality facilities – Way Marked Way Trails, National Cycle Network.




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Weaknesses

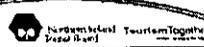
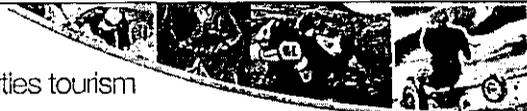
- Lack of product awareness in market place resulting in relatively small numbers of out-of-state visitors.
- Lack of packages available to customers.
- Lack of collaborative approach to marketing.
- Poor statistics on participation for Activity Tourism and a major weakness for measuring future growth.




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Market and Performance Tables: Year: 2004

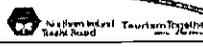
	GB	Scotland	Ireland	Northern Ireland
Angling	4,900,000	200,000	83,000	9,400
Adventure	N.A	N.A	N.A	N.A
Cycling	8,800,000	100,000	100,000	8,600
Equestrian	2,200,000	N.A	29,000	4,000
Golf	4,900,000	230,000	134,000	30,700
Walking	91,300,000	440,000	168,000	63,000
Waterports	8,300,000	100,000	N.A	N.A

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Vision Statement

"To build Northern Ireland's reputation in Activity Tourism and offer visitors outstanding experiences, capitalising on the quality of environment and facilities within which activities take place."





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Key Objectives:

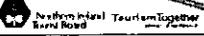
1. To use Activities to contribute to and support growth in the short breaks market.
2. To target activity enthusiasts and regular amateurs in each Activity Tourism segment through targeted marketing




activities tourism

Key Objectives

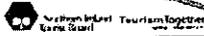
3. To target residents of Northern Ireland both to take more active breaks themselves and to influence and market to the Visitor, Friends and Relatives (VFR) sector to increase participation of Activities.
4. To develop the physical and business infrastructure, services and capacity to support future growth and deliver quality to the activity tourist.




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Key Market Sectors:-

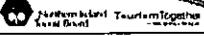
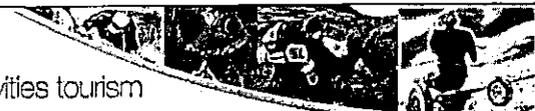
Market Segments	Geographic Markets			Consumer Markets			
	GB	ROI	NI/VFR	Dedicated Enthusiast	Regular Amateur	Occasional Active	The Family
Families	✓	✓	✓			✓	✓
Empty-Nesters	✓	✓	✓		✓	✓	
Couples	✓	✓	✓	✓	✓	✓	




activities tourism

Target Markets

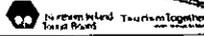
- GB Visitors – reinforcing the regional focus of Scotland, North West & South East England, as well as cities and hinterlands where direct flights to NI are established.
- ROI residents – to encourage higher penetration and use of activity facilities in NI.
- NI residents – to encourage them to take active breaks within NI.
- Visiting Friends & Relatives – to encourage repeat visits and experience the variety of activities whilst on VFR visits

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Who are they?

- GB residents
 - = empty-nesters, aged 45+, high disposable income, educated couples
- ROI + NI residents
 - = empty-nesters, aged 45+, cash and time rich, take regular breaks.
 - = Couples, aged 25+, no children, relatively high disposable income, time poor.
 - = Families, children under 10, parents work full-time, free time and disposable income limited.



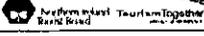

activities tourism

What are they looking for from a holiday?

GB = predominantly travel between April and September, bring own car, hotel, guesthouse, or B+B accommodation, good restaurants, visitor attractions, historic properties.

ROI = Empty-nesters – city, coastal and rural breaks, 3* plus hotels with good facilities, good restaurants, famous attractions.

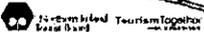
= Couples – destinations yet to be experienced by their friends, 4* plus hotels with leisure/spa facilities, famous attractions.





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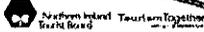
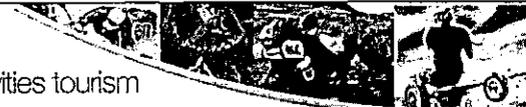
- = Families – easily accessible locations, child friendly accommodation, all inclusive packages, activity rich destinations, value for money.
- NI = Empty-nesters – city, rural and coastal breaks, high quality accommodation, good restaurants, leisurely sightseeing.
- = Couples – luxury accommodation, fine dining, quality sightseeing.
- = Families – locations less than 2 hours from home, child friendly accommodation, activity rich destinations, value for money.




activities tourism

How do they research and book?

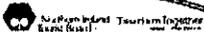
- GB = Guide books and brochures are particularly popular information sources, on-line booking is rapidly increasing.
- ROI = Guide books and brochures, internet and word of mouth is key. The press in the Republic is a much used source when searching for special or last minute offers.
- NI = Word of mouth, especially for families who are looking for recommendations to occupy their children. NI press/papers and the Internet.

activities tourism

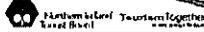
How to reach the consumer

- NI = Short Breaks 'Time' Campaign, features TV + press advertising, e-marketing to consumer database.
- = Destination PR focuses on radio promotions, competitions, journalist familiarisation trips.
- = Short Breaks Brochure – 65,000 brochures are produced and distributed throughout NI.



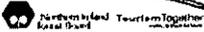

activities tourism

- ROI = Short Breaks 'Time' Campaign features TV, press and radio advertising, e-marketing, promotions and competitions.
- = Short Breaks Brochure (priced in Euro) - 25,000 brochures distributed in this market
- = Destination PR has a range of activity from radio and TV promotions, press releases, and feature articles to small media launches for groups of journalists to promote events and appropriate products.



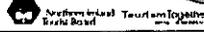

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- = Travel Trade in ROI is an important distribution channel. Activity with the Travel Trade incorporates familiarisation trips and e-marketing to 150 travel trade contacts highlighting new product developments.
- = Window Display – The Dublin office display brochures, leaflets and special offers and the opportunity for the industry to co-operate in campaigns, special offers and competitions.




activities tourism

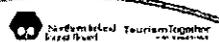
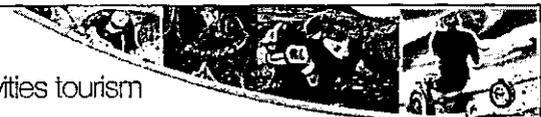
- GB = Direct Marketing. Tourism Ireland has a database of 225,000 contacts who are interested in holidays in Ireland.
- = Advertising -- a high profile campaign featuring television, press and radio advertising raising the awareness of the island of Ireland as a holiday destination.
- = Destination PR focuses on print, radio and television opportunities, plus competitions and feature articles.





activities tourism

- = Travel Trade. Developing a year round programme of familiarisation visits with Great Britain's best prospect travel trade and tour operators.
- = Exhibitions/Shows – Attendance at a range of trade and consumer shows throughout Britain with dedicated stand space for industry partners to directly promote and sell their product to the British marketplace.

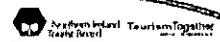



activities tourism

Who are the Active Tourists?

The Dedicated -- Enthusiast and dedicated sports women and men. Highly visible and identifiable, needs strongly focused on the quality of their activity.

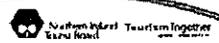
They will come from a variety of backgrounds, dependent on the profile of the activity or sport




activities tourism

The Regular Amateur -- may once have been competitors in their selected field or come late to the activity. The challenge and/or the quality of facilities will be important to the Regular Amateur.

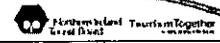
They will come from a variety of backgrounds and family circumstances.




activities tourism

The Occasional Active Tourist -- describes residents and visitors who may irregularly participate in a chosen activity. They can be easily put off from participating

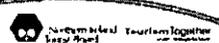
However the availability of some activities, if not actually used by this category of visitor, may help influence them to select a destination.




activities tourism

The Family -- safety and security are uppermost in the mind of The Active Family Tourist.

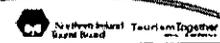
The Family will be looking for things to do that keep children entertained or that can be undertaken as a family, with different ages and abilities amongst family members. Their characteristics and motivators will otherwise be similar to the Occasional group.




activities tourism

How to reach The Activity Tourist:
Targeted Niche Marketing to :

Dedicated	- direct mail - targeted campaigns - influencer magazines - sporting bodies/groups
Regular Amateur	- testimonials - reputation - product promotion - Short Break marketing



activities tourism

Leisure/Destination Marketing to :

Occasional Active -- Short Breaks marketing campaign using press / radio / TV / posters / direct mail.

Family -- Consumer Website: www.discovernorthernireland.com

- destination marketing using press / journals / radio / competitions



Golf Pass





TYF Adventure

Sustainable development
Smart business
Neat profit



"...we live not, in reality, on the summit of a solid earth, but at the bottom of an ocean of air"

Thales of Miletus
c.625 – 545 BC

TYF: Smart Futures

"the air itself is a biological product -a result of active exchange of gases with living organisms."

James Lovelock
GAIA - The practical science of planetary medicine



TYF: Smart Futures

Putting development into perspective



- The pink ball represents the size of our atmosphere, relative to the planet
- It is already 80% full of the space we have for CO2

carbon

TYF: Smart Futures



Buncefield oil depot Hemel Hempstead

TYF: Smart Futures



economics

TYF: Smart Futures



1 kg CO₂

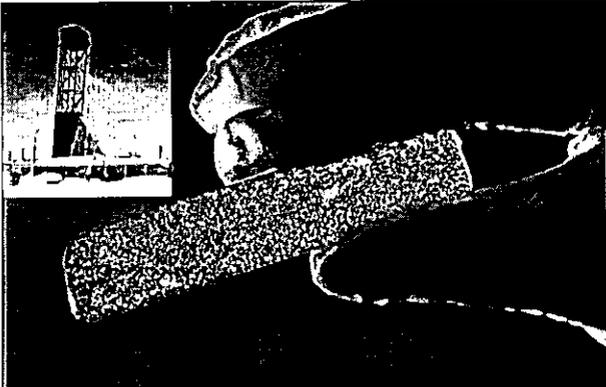
make carbon visible

TYF: Smart Futures

Two short stories

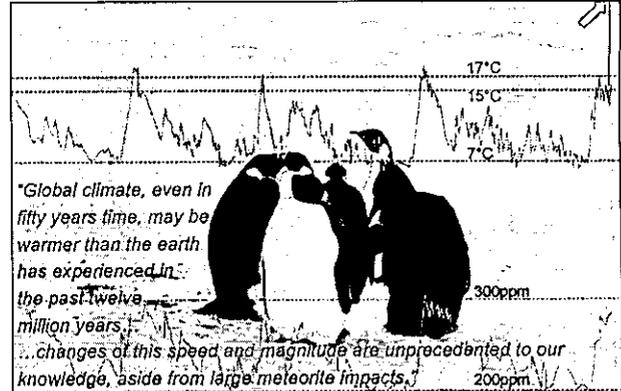


- One is about an ice drilling station on Lake Vostok, in Antarctica
- The other is about a glacier in South America



Vostok

TYF: Smart Futures



"Global climate, even in fifty years time, may be warmer than the earth has experienced in the past twelve million years. ... changes of this speed and magnitude are unprecedented to our knowledge, aside from large meteorite impacts."

Peter Barrett,
Antarctic Research Centre, New Zealand



Jacobamba, Andes

"Climate change is not an environmental problem. It is a civilizational problem."

Climate change is not just another issue. It is the issue."

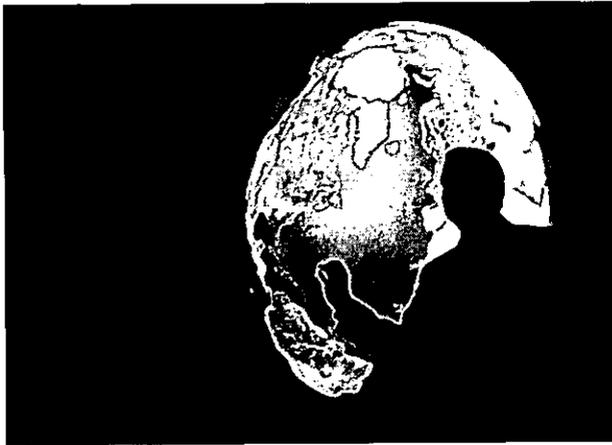
Ross Gelbspan
author of 'The Heat is on: The Climate Crisis'



"...imagine a country where carbon becomes a new currency."

David Miliband, UK Environment Minister, speech at the Audit Commission Speech, July 2006

TYF: Smart Futures



TYF St Davids



- Making waves for 20 years
- Evolved in the Galapagos
- Three generations of activism
- We're an integrated business, not an adventure business

Measure the right stuff

- 1% for the Planet
- Carbon Journey
- Green Dragon Level 3
- St Davids Eco City sponsorship
- 3% staff time for community
- Ethical sourcing
- Organic Approved
- Vegetarian Society



TYF Adventure

One Planet Tourism

- World's first carbon neutral adventure business
- 12,000 adventure customers each year
- Invented coasteering & freestyle World Championships
- Key partner with Bluestone
- First pitch for £1m



TYF Eco Hotel

One Planet Hospitality

- Organic and local food, wines & beers
- Powered by the wind
- 15 mile menus
- Relaxed service from real people



TYF Consulting

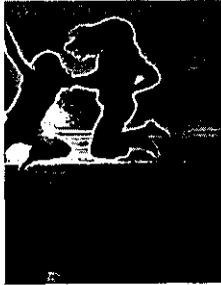
One Planet Thinking

- Leadership for sustainable futures
- Building capacity for ecological decisions
- Reconnecting the compass to true north
- Government & business, local & international



TYF Naturally Outdoors *One Planet Retail*

- Organic cotton & Merino clothing from Howies & Patagonia
- Sustainable supply chain research with CIPD
- Trying to understand ethical retail



Reinventing Fire



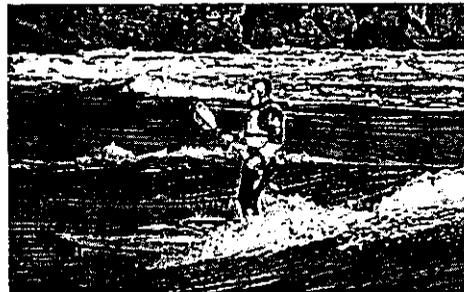
Reinventing our relationship with nature



Termites
Exactly 30 degrees
Temperature outside ranges
From 1.5 to 40 degrees

TYF: Smart Futures

Reinventing Risk



Go Ape!
HIGH WIRE FOREST ADVENTURE

Case Study: Go Ape!
New Products and Innovative Ideas

Presentation Contents

- An Introduction to Go Ape!
- The Go Ape 'pull effect' and 'Destination Mix'
- Benefits of Go Ape!
- Marketing Innovations
- Future innovations
- Q & A

Go Ape! Values

- Creating Adventures; encouraging others to live life more adventurously
- Challenge, surprise, excite
- Encourage "I can't" to become "I can!"
- Be socially & environmentally responsible
- Create worthwhile, well rewarded jobs

Destination Draw Effect

- Go Ape pulling power
- Creates 'Destination Draw'
- Mutually beneficial relationship with other on site components

Benefits Social

- Imbues Risk awareness, risk management and personal responsibility skills
- Physical, healthy, anti-obesity, outdoor activity
- Provides for and appeals to the hard to engage
- Builds self confidence, conquering fear of heights
- Introduction to climbing

Benefits Local

- Employment
- Increases length of stay time at site
- All weather activity
- No exclusive area required
- Benefits other local businesses

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

5 Marketing Innovations Driving Go Ape's Business

1. Public Relations Professionals

2. Automised Customer Surveying



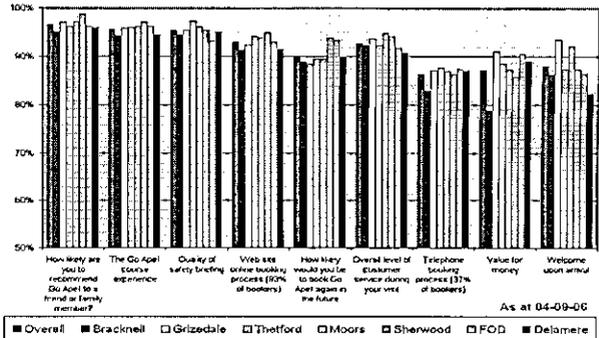
Customer satisfaction questionnaire

1 = Excellent 2 = Good 3 = Average 4 = Poor 5 = Very Poor

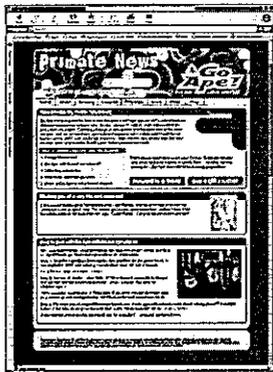
Please rate Go Apel in the following areas, where applicable

	1	2	3	4	5
1/15) Web site online booking process	<input type="radio"/>				
2/15) Telephone booking process	<input type="radio"/>				
3/15) Welcome upon arrival	<input type="radio"/>				
4/15) Quality of SMETS briefing	<input type="radio"/>				
5/15) The Go Apel course experience	<input type="radio"/>				
6/15) Overall level of customer service during your visit	<input type="radio"/>				
7/15) Value for money	<input type="radio"/>				
8/15) If you were less than satisfied with any of the above areas please provide further details	<input type="text"/>				

Percentage of responses scoring a 1 or 2 rating



3. Database marketing



4. Gorilla Marketing

- UTube
- Google adds
- Events: Great Gorilla Run

5. Time Pursuit A state-of-the-art leisure management system!

- Designed specifically for time-ratoned perishable activities/services
- Flexible to accommodate multi-site, multi-activity businesses
- Shadow carbon currency with carbon offset built into shopping basket
- 100% financial accountability of web, call-centre and on-site sales
- Delivers cross-organisation communication and productivity
- Dashboard for the business, offering financial/management control



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 V 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?

Marketing Successfully on a Budget

Mandy Whitehead



Understand the difference between Marketing & Promotion

- Product
- Place
- Price
- Promotion



High Trek Snowdonia

- 1986
- Late gap year
- Life style choice
- What to do?



HIGH
TREK
Snowdonia



The Product

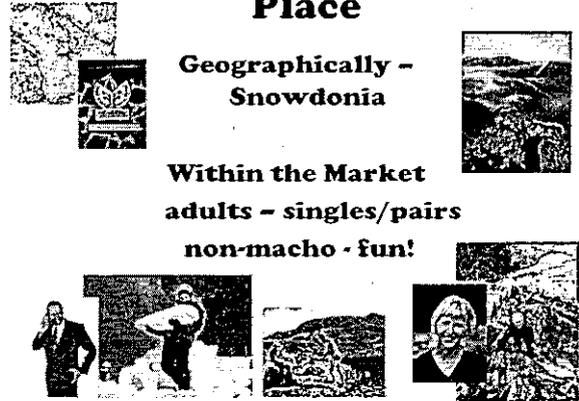
- Mountain Holidays – USP?
- Tough days - Soft nights
- Professional instruction
- Chalet party atmosphere
- Everything included



Place

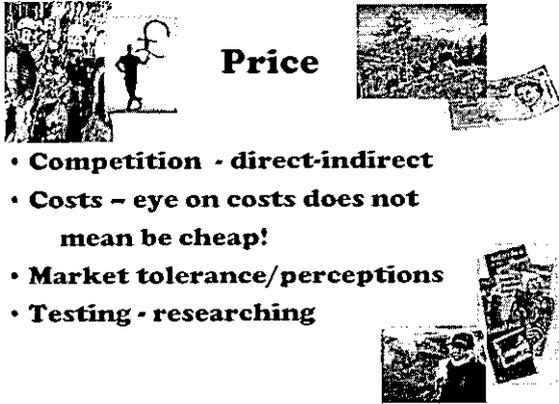
Geographically –
Snowdonia

Within the Market
adults – singles/pairs
non-macho - fun!



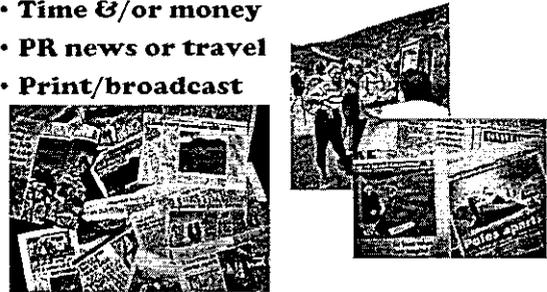
Price

- Competition - direct-indirect
- Costs – eye on costs does not mean be cheap!
- Market tolerance/perceptions
- Testing - researching



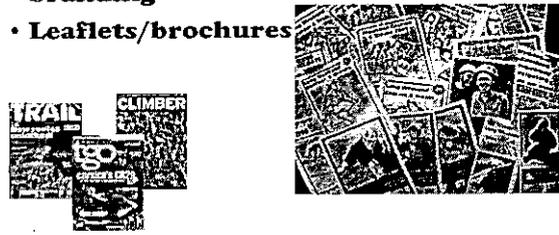
Promotion

- Time &/or money
- PR news or travel
- Print/broadcast



New Business

- Advertising – schedule - budget monitoring - creative content branding
- Leaflets/brochures



Relationship Building

- Mailings post – e mail
- Web Marketing





Website is NOT an online brochure

- Construction - clear navigation
- Context - relevance
- Content - reliable useful
- Control - updated
- Communication - search engines



Remember P's & C's!

- Product
- Place
- Price
- Promotion
- PEOPLE



THE END



Countryside, Coast and Nature - VisitBritain's Approach to Activity Tourism

Amanda Smyth
England Domestic Marketing Manager

7 February 2007

About Enjoy England

- Established 2003
- Marketing of England in UK and key European markets
- Maximising return on investment by generating expenditure in domestic visitor economy
- Working in partnership across public and private sectors - platform
- England destination brand - changing perceptions

England Marketing Activity

Enjoy England:

- £4 million programme incorporating TV, multimedia, outdoor, radio, press, & online
- Shows breadth of England product, including countryside & rural experience



England International:

- France, Germany, Ireland & Netherlands
- Touring campaigns
- Highlights England's coastline, countryside, cities, gardens, historic houses
- Touring is 2nd most popular type of holiday in Europe

Meet England

England Marketing – product campaigns



The countryside & rural experience features prominently

enjoyEngland

The case for a 'rural' campaign

- Increasing interest and awareness of countryside
- Contrast to standardised, urban living areas
- Less risk of terrorism and pollution
- Increasing interest in health/fitness, walking/cycling
- Short Break trend
- Intl visitors important – 25% of countryside visitor spend



Enjoy England Target Markets

- Defined by value based segmentation
 - Cosmopolitans
 - Discoverers
 - High Streets
- ABC1 – affluent
- Spans age ranges
- Couples and Families
- Predominantly short breakers

Consumer demand and motivations

- UK adults take 14 million holiday trips and 1.1 billion leisure day trips to the English countryside every year
- **Unspoilt Countryside** is a key driver of satisfaction to British visitors and at which England is recognised as excelling
- **Facilities for Walking, Rambling or Hiking** are also seen as strengths for England
- **Chance to see Wildlife in its Natural Habitat** is important to visitors and a priority for England



Outdoor England Campaign

- 1st campaign launched in 2003 following consumer demand for info on England's outdoors and countryside
 - ROI of 18:1, £4.4m incremental spend
- 2nd campaign: July 2005 – September 2006
- Target segments: *Cosmopolitans, Discoverers, High Streets*
- Objectives:
 - Show depth/breadth of outdoor experiences in England, increase seasonal/regional spread, increase visits and spend
 - Change perceptions – surprise and delight, create excitement
 - Generate incremental spend at 14:1

Outdoor England Campaign

Main Themes

- **Your Outdoors**
walking, cycling, riding, farms, National Parks
- **Wild Outdoors**
bird-watching, other wildlife spotting, camping & caravanning, marine life, nature reserves
- **Waterside**
sailing, surfing, seaside, inland waterways, fishing, maritime heritage, seafood
- **Extreme Outdoors**
climbing, skydiving, abseiling, long-distance hiking and mountain biking



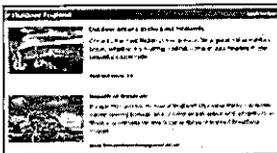
Outdoor England

- Campaign marketed through variety of activities to meet objectives:
 - PR and editorial supplements
 - Advertising (press, niche, outdoor)
 - Online (e-newsletter, competitions, viral)
 - Field marketing (consumer shows, exhibitions)
 - Direct Mail
 - Promotions (National Media, Radio, Online)

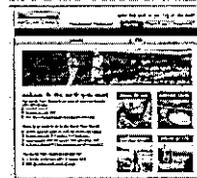
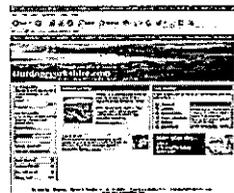
Fulfilment: 84 page brochure
Website:
www.enjoyengland.com/outdoor



Outdoor England



Partnership working



Future Plans – Rural Escapes

- Broadens scope of Outdoor England to include more rural product
- Sustainability
- Wider partnership opportunities as outdoor product has developed

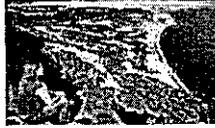
Outdoor activities beyond Enjoy England

- Meet England
 - Key element of destination sell for business tourism (venueyorkshire.com)
 - Product strength for incentive and corporate team-building
- International marketing
 - Part of touring campaign in key markets
 - Repeat visitor potential

Countryside, Coast & Nature Sector Club

- Group of private and public organisations that have a key stake in countryside and rural tourism

- Focus on British countryside & coastal experience to both domestic and international visitors



- Research
- Marketing opportunities
- Best Practice
- Networking
- CCN Tourism Advisory Guide
- www.visitbritain.com/sectorclubs

CHRIS SCOTT
MARKETING OFFICER



CASE STUDY:
INTERNATIONAL BUSINESS
ENGLISH LANGUAGE SCHOOL MARKET

share INTRODUCTION Holiday Village

- › Background to Share Holiday Village
- › International Business at Share
- › New Beginnings
- › Market Entry
- › Breakthrough
- › Future
- › Learning Points

share BACKGROUND Holiday Village

- › Established 1981
- › Registered Charity
- › Ethos – Inclusion between disabled and non-disabled people
- › Situated on Shores of Upper Lough Erne
- › Grown to Ireland's Largest Multi – Activity Centre

share INTERNATIONAL BUSINESS AT SHARE Holiday Village

- › 1st International Summer School 1983
- › La Baule Exchange
- › Link with French Civil Service 1997/1998
- › No International Business from 1998-2006

share NEW BEGINNINGS Holiday Village

- › Peace
- › Activity Tourism – NITB Winning Theme
- › Renewed Optimism
- › “Dublin Airport Experience”



Holiday Village

MARKET ENTRY

- > Research
 - Large ROI Market
 - Few Barriers to Entry
- > Target Market
 - Groups rather than Individuals
 - France, Spain and Italy



Holiday Village

STRATEGIES

- > Partnership
 - Fermanagh Lakeland School of English
- > Tourism Ireland
- > Fermanagh Lakeland Tourism RTO



Holiday Village

STRATEGIES

- > NITB "Meet the Buyer" Workshop 2005
 - Interest from French Tour Operators
 - Fam Trip
 - Pilot Booking July 2006



Holiday Village

BREAKTHROUGH

- > NITB "Meet the Buyer" Workshop 2006
 - Attended NITB Training
 - Research -- Research -- Research
 - Clearer Objectives
 - More Competitive Packages
 - Enhanced Reputation



Holiday Village

2007

- > 600% increase in European Business
- > Large increase in enquiries from International Tour Operators
- > Busy Summer Ahead



Holiday Village

FUTURE

- > Develop New Opportunity
 - Allocate Accommodation for English Language Schools
 - Increase range of Tour Operators
 - Increase Shoulder Season Bookings
- > Act as Northern Ireland Agent for Tour Operators



Learning Points

- > Research – Research – Research
- > Use Sample Programmes
- > Personal Contact is a MUST
- > Arrange FAM Trips
- > There is No Language Barrier
- > Take Care regarding Allocation

Chris Scott
Marketing Officer



chris@sharevillage.org

028 677 22122

www.sharevillage.org

Doing the basics well!

Martin Mc Mullan
The Highpoint Group



INTERACTIVE TEAMBUILDING

The Highpoint Group

Established in 1996

The Highpoint Group



To fill a gap in the
design and delivery of
Corporate Adventure
within NI

The Highpoint Group



Individual, Team and
Leadership Development
Programmes

The **Highpoint** Group
INTERACTIVE TEAMBUILDING



Company Away Days
and Incentive Activities

The **Highpoint** Group
INTERACTIVE TEAMBUILDING



Uk and Ireland wide

The **Highpoint** Group
INTERACTIVE TEAMBUILDING



An average of 2800
participants per year

(Based upon figures for 1996-2003 inclusive)

The **Highpoint** Group
INTERACTIVE TEAMBUILDING



An average of 50 events
per year

(Based upon figures for 1996-2003 inclusive)

The **Highpoint** Group
INTERACTIVE TEAMBUILDING



5 to 500 participants per
event

(Based upon figures for 1996-2003 inclusive)

The **Highpoint** Group
INTERACTIVE TEAMBUILDING



An average of 30 clients
per year

(Based upon figures for 1996-2003 inclusive)



The Highpoint Group
ADVENTURE & TEAMBUILDING

MOUNTAIN & WATER SPORTS CENTRE

The Highpoint Group
ADVENTURE & TEAMBUILDING

Established in 2003



The Highpoint Group
ADVENTURE & TEAMBUILDING

To fill a gap in the
delivery of Adventure
Tourism within the
greater Mourne region



The Highpoint Group
ADVENTURE & TEAMBUILDING

To fill a gap in the delivery
of Adventure activities to
Domestic Market



The Highpoint Group
ADVENTURE & TEAMBUILDING

Northern Ireland wide
expanding into ROI and
the rest of the UK



The Highpoint Group
ADVENTURE & TEAMBUILDING

An average of 11,043 participants per year

(Based upon figures for 2003-2006 inclusive)

The Highpoint Group
MOUNTAIN & WATER SPORTS CENTRE



An average of 957 events per year

(Based upon figures for 2003-2006 inclusive)

The Highpoint Group
MOUNTAIN & WATER SPORTS CENTRE



1 to 500 participants per event

(Based upon figures for 2003-2006 inclusive)

The Highpoint Group
MOUNTAIN & WATER SPORTS CENTRE



An average of 1023 Clients per year

(Based upon figures for 2003-2006 inclusive)

The Highpoint Group
MOUNTAIN & WATER SPORTS CENTRE



Key differences;

- A **Volume** increase
- Dealing with the **Public**
- A **Volatile** market

The Highpoint Group
MOUNTAIN & WATER SPORTS CENTRE



Key Consequences;

- For the first **two** years of trading the centre **failed** to break even

The Highpoint Group
MOUNTAIN & WATER SPORTS CENTRE



Benefits;

- Profitable Business
- Excellent Service

The Highpoint Group
ALPINE & MOUNTAIN SERVICES



Thank You

The Highpoint Group
ALPINE & MOUNTAIN SERVICES



ARE YOU LOOKING FOR
ADVENTURE

44 (0)28 4377 0714

www.thehighpointgroup.com

The Highpoint Group
ALPINE & MOUNTAIN SERVICES

A banner advertisement for The Highpoint Group. It features a dark background with a white and yellow text overlay. The text includes "ARE YOU LOOKING FOR ADVENTURE", a phone number "(0)28 4377 0714", and the website "www.thehighpointgroup.com". There is a small image of a person in a kayak and several logos for partner companies like "MOUNTAIN EQUIPMENT" and "ALPINE & MOUNTAIN SERVICES".