

ADVENTURE TOURISM AND SOCIAL ENTERPRISE





Foreword

This paper is part of a series of Senscot Briefings which aim to showcase the approach that social enterprise is taking to address a range of complex social issues across Scotland. An important aspect of this Briefing is to help understand the size and scale of adventure tourism in Scotland, to promote opportunities for social enterprises and help them to capitalise on the routes to growth.



What is a social enterprise?

A social enterprise (SE) is a trading business – selling goods and services – whose primary objective is to achieve social and/or environmental goals. Senscot recognises SEs in Scotland based on the criteria set out in the Voluntary SE Code of Practice.



Who are we?

Senscot is a third sector intermediary established in 1999. Along with others, we have helped to develop a support infrastructure for SEs over the last 15 years. A key part of our work is to support Social Enterprise Networks (SENs) – geographic and thematic - across Scotland. See www.senscot.net to find out more.



The context of this briefing

The importance of tourism to Scotland's economy is without doubt, currently contributing around [£6bn of GDP each year](#) – around 5% of the total. It is also a sector which is experiencing significant growth, with an extra [20,000 jobs created since 2011](#) and now accounts for one in every 12 jobs in Scotland.

There is huge economic potential to be tapped into for communities across Scotland who can harness this boon, which is why in 2012 a national tourism strategy was launched with the aim of growing visitor spend from £4.5bn to £5.5bn by 2020.

[Tourism Scotland 2020](#) (TS2020) identifies adventure tourism as a market which has a significant potential for growth, and there are a growing number of social enterprises across the country who are adapting to this growing sector by integrating outdoor activities with social impact strategies.

This paper aims to demonstrate that by collaborating with local businesses and the wider tourism sector, social enterprises are able to expand their range of activities and grow their tourism offer – and by doing so bring added economic benefits to their local community.



ADVENTURE TOURISM: A BACKGROUND



Photo Credit: Visit Scotland Kenny Lam

Regarded as one of the most rapidly growing sectors in the world, tourism is a vital component of the Scottish economy, which benefits to the tune of £11bn each year.

The latest [Visit Scotland figures](#) indicate that over 14 million overnight tourism trips were undertaken in Scotland in 2016 – an exceptional market for tourism-based social enterprises to tap into.

Scotland enjoys a diverse range of natural attractions with which to entice the overseas tourist – a mountainous landscape, rugged coastlines, a stately larder and vibrant wildlife. With such a first class offer at its disposal, Visit Scotland estimates that nature-based tourism alone brings in £1.4bn to Scotland each year.

Closely allied to nature tourism is adventure tourism: the pursuit of physically challenging activities and cultural exchanges in a natural setting. Adventure tourism is increasingly being targeted for market growth across the world, with many countries recognising its ecological, cultural, and economic value.

Given the richness and diversity of Scotland's natural landscapes, it is uniquely placed to capitalise on the potential for growth within the adventure tourism market, as outlined by the Scottish Government's Tourism 2020 strategy.

The number of overseas tourists visiting Scotland rose by **16.9%** to **3.2 million**.

Expenditure increased by **23%** to **£2.3bn**.

The record figures were driven by European visitors who made **1.9 million** visits to Scotland, a **17%** increase from 2016.

Spending rose by **36%** to **£1.1bn**.

Across the UK as a whole the number of European visitors increased by **1%** and spending fell by **1%**.

[Source: Office for National Statistics Travel Trends 2017](#)

TYPES OF ADVENTURE TOURISM

The definition of adventure tourism is often varied and a matter of debate within the tourism industry. In 2010, the [Adventure Travel Trade Association \(ATTA\)](#) outlined adventure tourism to include “any domestic or international trip that includes at least two of the following three aspects: physical activity, interaction with nature and cultural learning or exchange.”

However, the definition of the adventure tourism sector used for this paper is the now commonly held sector definition developed in the [Adventure Tourism in Scotland – Market Analysis Report 2010](#), and is as follows:



Walking/Climbing

Mountain walks or treks, long distance trails, rock climbing and mountaineering.



River Activities

Canoeing, kayaking, rafting and canyoning.



Cycling/Biking

Road bike touring and mountain biking trails.



Marine Activities

Sailing, sea kayaking, surfing and diving.



Wildlife/Nature Watching

Boat and vehicle excursions to view animals in their natural habitat, or nature trails.



Snow Activities

Skiing, snowboarding, ski-touring, snow-shoeing and ice climbing.



ADVENTURE TOURISM IN SCOTLAND



Photo Credit: Badaguish

According to HIE's [Adventure Tourism in Scotland Research Report](#) – there were at least **350 Adventure Tourism businesses operating in Scotland in 2015.**

More than a third of adventure tourism businesses were located in the Highland Council area, followed by 12% in Argyll and Bute and 8% in Perth and Kinross. 84% of businesses described themselves as activity and experience providers, with the remainder identifying as activity centres and attractions.

SECTOR INFORMATION

Scotland attracts tourists from all over the world due to its huge range of natural, heritage and cultural attractions – not to mention all the whisky, golf and tartan!

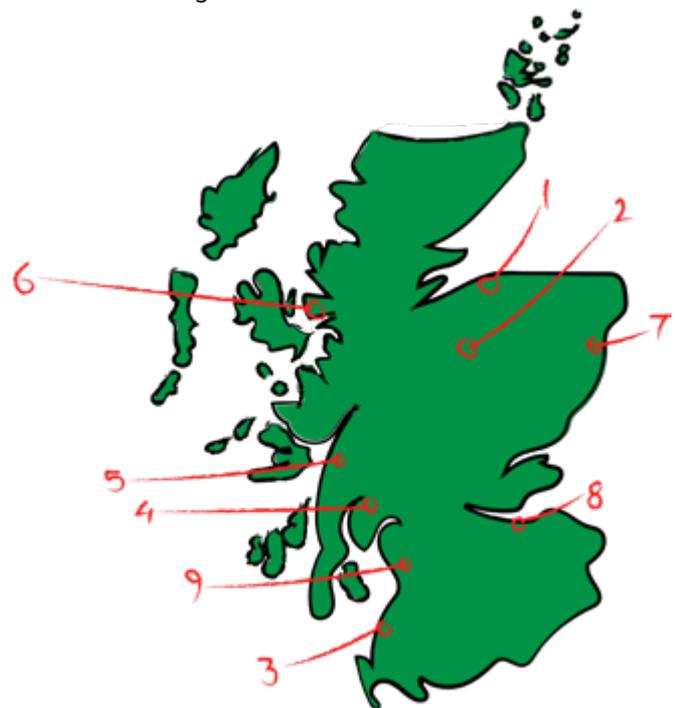
There is a high degree of seasonality, with most visiting in the summer. Around half of visits include visiting the countryside and/or walking. The adventure tourism market's potential for growth relies on its ability to provide an attractive offer to tourists once they have arrived.

With a national cycle network covering over 2000 miles through some of Europe's most stunning landscapes, Scotland is a top destination for cyclists, who spend over £110m each year during visits, according to [Visit Scotland's 2017 figures](#).

Scotland's 282 Munros make it a must-visit destination for hillwalkers: in 2015, [over two million trips to Scotland included a long walk, hike or ramble](#) – an increase of 18% from Visit Scotland's 2014 figures.

SEN MEMBER ACTIVITY

The map below shows examples of Social Enterprise Network (SEN) members who are currently delivering outdoor learning and adventure activities in Scotland.



1. [Outfit Moray](#)
2. [Badaguish](#)
3. [Adventure Centre for Education \(ACE\)](#)
4. [Adroy Outdoor Education Centre](#)
5. [Stramash](#)
6. [Venture Mor](#)
7. [Transition Extreme](#)
8. [My Adventure](#)
9. [Newmilns Ski Slope](#)



TOURISM SCOTLAND 2020: A NATIONAL TOURISM STRATEGY



Photo Credit: Visit Scotland Kenny Lam

The **Tourism Scotland 2020** strategy aims to grow Scotland's visitor spend by £1bn in real terms, from £4.5bn in 2011 to £5.5bn by 2020.

To achieve this, the strategy has identified three key growth markets to make up the backbone of tourism revenue by 2020.

Home turf:

£3,127m in 2011

Potential £3,586m–£4,238m in 2020

England, Scotland, Northern Ireland, Wales.

Near neighbours:

£731m in 2011

Potential £875m–£1,035m in 2020

Scandinavia, Germany, France, Spain, Ireland, Netherlands, Italy.

Distant cousins:

£414m in 2011

Potential £505m–£598m in 2020

USA, Australia, Canada.

“Our collective ambition is to be a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people.”

Tourism Scotland 2020

Adventure tourism is identified as an area which offers “significant potential for growth” within the strategy.

Collaboration between local businesses in rural destinations is key to developing a tourism offer which can engineer economic growth – local assets such as hill walking and cycling can be integrated with culture, local history, food and drink to create immersive tourism packages which better reflect the local area.

“Tourism Scotland 2020 identified nature and activities as a key asset for Scottish tourism and to develop this further, the leading tourism industry groups involved in this sector came together under the Outdoor Tourism Group.”

Scottish Tourism Alliance

KEY ACTIONS FOR GROWTH

Adventure Tourism - Worth 34% of all tourism spend. Boost marketing capabilities – particularly in international markets – alongside further investments in product development, skills and training.

Cycling - Working with Wild Scotland, Cycle Tourism Scotland and Developing Mountain Biking in Scotland to support the delivery of the newly created cycle tourism strategy which seeks to position Scotland as a significant cycling destination.



OPPORTUNITIES AND FUTURE MARKETS



Photo Credit: Adventure Centre for Education

PARTNERSHIP WORKING

Cross sector collaboration initiatives can play an important role in developing the adventure tourism market.

Sectors such as retail and transport benefit from the tourism industry through improved infrastructure, increased footfall and repeat custom, while accommodation providers can work in tandem with adventure tourism organisations in the area to create a better-quality tourist offer to entice visitors to the area.

Collaboration between social enterprise, private business and the public sector is key to increasing the quality of tourist offer available, however more could be done between social enterprise projects and with the wider tourism industry:

Connecting to [Destination Management Organisations](#)

ensures that social enterprises have access to targeted marketing, market insights, and so they can share their 'story' with potential customers.

Communication between social enterprise and tourism operators ensures that the customer journey flows more efficiently.

Signposting visitors to the right place at the right time ensures a better visitor experience.

SUSTAINABLE TOURISM

Sustainable tourism is often talked about within the industry, the changing nature of demand as consumers try new experiences and new destinations should be exploited.

As tourists become more environmentally and socially responsible, adventure tourism organisations can tap in to this growing market by taking a number of measures into consideration. [Visit Scotland has a handy guide](#) which outlines the importance sustainable tourism.

CUSTOMER JOURNEY

The nature of the customer journey is changing all the time, with [68% of visitors now starting their holiday journey online](#) – adventure tourism-based social enterprises can take advantage by continually reviewing where they engage with the customer on their journey:

Is your digital footprint large enough – could some added **digital marketing or targeted Facebook adverts** ensure you're spotted online by potential intrepid explorers?

Do you have a **visible presence** through leaflets or billboards on the travel route?

Do your activities appear as part of the tourist offer for **local accommodation providers**, could this pique someone's interest during their stay?

Can you offer tailored offers with other local businesses or restaurants as part of a **unique package**?

Have you worked with other local businesses to **signpost each others services** and activities?

Can you incentivise customers to **share their experiences** with as many people as possible online e.g. Facebook competitions etc?

SOCIAL IMPACT



Photo Credit: Visit Scotland Kenny Lam

HEALTH BENEFITS

Adventure activities bring about a range of health benefits, including weight loss, improved posture and increased mobility, while keeping fit can reduce the risk of serious illness such as heart disease.

Engaging in outdoor activities has been shown to have a positive impact on people's mental health. Improved confidence can lead to the relief of stress and stress-related illness, while practicing mindfulness during outdoor pursuits can bring about a greater awareness of our thoughts and feelings.

The social aspect of taking part in outdoor activities can also lead to positive health outcomes – individuals are more likely to feel included and better connected by meeting new friends and improve their social skills through interactions with like-minded people.

EMPLOYABILITY AND SOCIAL SKILLS

Personal development has long-since been a key benefit of taking part in adventure activities – learning to cooperate with others in teams helps build soft skills such as communication and team working abilities, while testing yourself against others builds a competitive edge.

The physical endurance needed for more demanding outdoor sports, where you test yourself in challenging environments, creates a resilience that is transferable to other aspects of life.

Outdoor activities also help people develop skills for life, learning and work, while young people can experience improved learning leading to better academic attainment. Many adventure tourism operators work closely with schools to tailor specific learning programmes which are adapted to fit into the curriculum.

Experience of working with outdoor activities can allow people to progress into positive destinations through training, volunteering or apprenticeship schemes.

ECONOMIC BENEFITS

Tourism brings employment opportunities, enhances the economy of the region, and creates revenue for local businesses.

There are many positive economic impacts for communities from adventure tourism:

Employment and Training - An increase in skills and local jobs created.

Stronger Communities - a higher quality of life for locals by helping build links to other organisations and increase social interaction.

Supporting the Local Economy - increase in average income that spreads throughout the community when tourism is harnessed effectively.



CASE STUDY

BADAGUISH CAIRNGORM OUTDOOR CENTRE AVIEMORE



Established
1984

Turnover
£804,000

Legal Structure
Co. Ltd by Guarantee
with charitable status

Workforce
15 staff
plus volunteers

Badaguish promotes outdoor activity holidays in Speyside for people with a disability by providing accessible and affordable accommodation facilities and services.

facilities to provide an accessible base for a wide range of schools, community groups and families.

Badaguish also host a range of outdoor fundraising events all year round, including the Aviemore Half Marathon and the Corrieyairack Challenge, a mountain duathlon which traces the footsteps of Bonnie Prince Charlie over Scotland's highest mountain road.

ACTIVITIES

The Badaguish Cairngorm Outdoor Centre comprises a holiday care lodge and specialised facilities which are registered with The Care Inspectorate to provide both day care and residential care for children and adults.

The lodge provides fun, sociable and safe short breaks for people living with learning disabilities or who have more complex care and support needs.

A holiday programme of outdoor activities is tailored to each guest or group's specific needs, supported 24 hours a day by qualified and experienced staff, to provide an inclusive and secure environment for people to enjoy the surrounding attractions of the Cairngorms National Park.

All facilities and activities have been purpose designed with accessibility in mind. Lodges have ground floor sleeping accommodation with en suite shower and laundry facilities, with the option to book care beds and shower chairs. Outdoor access to the lodges is barrier free, while a purpose-built network of pathways provides optimum wheelchair access.

A range of self-catering lodges, wigwams and campsite accommodation are available to book, each with adapted



Holiday lodges have adapted facilities for people with complex care needs.

REVENUE STREAMS

Badaguish Centre enjoys a prime location in the Cairngorms National Park and is increasingly popular internationally, with a variety of visitors all the year round.

This enables charging at commercial rates (bookings for a 12-bed lodge start at £270 a night, for example) which creates a healthy surplus to subsidise the centre's charitable activities.

Executive director Andrew Mackenzie describes how Badaguish's ethos of inclusivity is at the heart of its business model: "We try to ensure that there is a range of accommodation options so that the cost to stay is affordable for all budgets."

“Outdoor camping and activity areas have been purpose designed with plenty of open space to give youth groups extra space for activities and team games without disturbing others.

“Camping is from £8 per night, wigwam cabins are from £12 per person depending on group discounts.”

Registration fees collected from outdoor fundraising events throughout the year bring in a valuable revenue stream This helps keep holiday care fees affordable to more families.

Events include the family-friendly Macdonald Mile Fun Run, with registration just £3, all the way through to the gruelling Corrieyairack Challenge, which brings in £68 for each participant to cover costs of running the event and create a healthy surplus for the centre’s activities.

Every £200 raised helps to provide a respite care activity holiday at Badaguish for adults and children with a disability.

“With well over 2000 participants each year and support from over 100 local volunteers these have enormous value in raising awareness and promoting the charity. They provide essential deficit funding for the Holiday Care Unit,” Andrew explains.

Andrew’s next challenge is to build further revenue streams to ensure Badaguish’s sustainability – there are currently plans afoot for a scheme to reward repeat customers.

“What we need to work on next is to market a membership scheme and make it easier for target customer groups to benefit from discounted rates.

“The Trust’s aim for many years has been to fund its charitable services on a sustainable basis from trading with no revenue grants. This has been a tough discipline, but it has been successfully achieved over the last five years.”



Adventure activity packages are tailored to each guest or group’s requirements.

SOCIAL IMPACT

Over the last 30 years, Badaguish has created unique adventure holidays for many thousands of people living with disabilities.

Activities are designed to enable personal development for people of all abilities, promoting an active, healthy and sociable lifestyle by developing recreational skills which will continue to impact people’s lives after they have returned home.

“Badaguish is lucky to have an extraordinary effect on people – which is basically falling in love with the place. It does have a special quality of making people feel instantly at one with the environment, magnificent mountain surroundings and the tranquil forest location,” Andrew says.

“Badaguish special environment together with the nature of the Trust’s work also attracts a special kind of people to work here. Often with a huge commitment and enjoyment to be sharing their own joy in the outdoors with people who are less fortunate. It’s good to think of the contribution Badaguish has made over the years.”





CASE STUDY

ADVENTURE CENTRE FOR EDUCATION SOUTH AYSRSHIRE



Established
2010

Turnover
£168,000

Legal Structure
Co. Ltd by Guarantee
with charitable status

Workforce
7 staff
10 freelance instructors
8 volunteers

Adventure Centre for Education (ACE) aims to provide adventure activities for all people in the south west of Scotland, no matter what their background or financial situation.

ACTIVITIES

ACE's activities are divided into three categories: adventure tourism, community development and education work. Underpinning all of ACE's work is a wide range of outdoor activities in and around Ayrshire, specifically programmed to encourage personal development, confidence building and educational attainment.

ACE provides adventure sports such as rock climbing, mountain biking and coasteering, through to outdoor learning and developmental programmes which work on team building and bushcraft skills.

The education branch of ACE's activities uses adventure sports to offer practical training, building towards nationally recognised certificate awards.

Their apprentice scheme helps young people in Ayrshire work towards becoming a fully-trained instructor in a range of outdoor activities, while trainee placements, work experience and volunteering opportunities are also offered.

ACE also works closely with funding partners and schools so that tailored packages can be integrated into the curriculum and used to build pupils towards their SQA qualifications.

ACE's trading subsidiary, Adventure Carrick, runs a wide range of outdoor adventures for individuals, families and corporate groups, and also offers holistic adventure packages which work to develop an individual's positive mindset, balance and nutrition.

Hillwalking, mountain biking, coasteering, archery, canoeing and bushcraft are just some of the activities on offer, often packaged with mindfulness exercises, yoga sessions and nutrition courses to create unique adventure experiences.



Extreme rockpooling is a popular activity for younger children.

ACE Manager Chris Saunders said: "We look at how you can integrate yoga, mindfulness, meditation, philosophical, esoteric ideas into the realms of the activities that we provide, like mountain biking and gorge walking."

Through Adventure Carrick, ACE has created a range of bespoke adventure activity packages which are designed to promote sustainable activity tourism within the Galloway and Southern Ayrshire UNESCO Biosphere. 'Biosphere Adventures' are designed as journey based experiences and showcase the outstanding natural beauty of the region. The UNESCO Biosphere designation recognises the fantastic array of landscapes, wildlife, cultural heritage and learning opportunities that SW Scotland offers - for communities, businesses and visitors to experience and celebrate in a sustainable way.

REVENUE STREAMS

ACE initially had to rely on grant funding to run specific activities, but after building up a reputation locally for the quality of their outdoor programmes, local businesses began approaching ACE for specific pieces of work and they were able to start applying charges to their activities.

Over the last ten years, however, ACE's main revenue stream has come through the education sector.

"We help schools and youth groups find funding packages that they can tap into to buy our services," Chris explains.

"The education sector, youth sector, some of the developmental departments of the council such as community safety, skills development – they've been our main revenue streams."

ACE also works with key funding partners to deliver developmental projects which benefit the local community, which has led to them increasing their scope of activities to include the wider tourism market: "We've worked with organisations like the Robertson Trust, the William Grant Foundation – they've supported pieces of work around youth employment.

"We've had developmental work around young women in the outdoors, so for five years we've had funding from numerous bodies, Children in Need for example, where they funded workers to work on those specific pieces of work.

"That, over time, has moved into us tapping into more commercial areas such as the tourism sector, family holiday activities, corporate development pieces of work, supporting local hotels, caravan sites etc, providing activities for them, working with National Trust Scotland – tapping into those markets as well."

Adventure Carrick also offers an equipment hire service to enable customers and visitors to enjoy outdoor recreation activities and remove barriers to participation.



Stand up paddle boarding offers magnificent views of Aisla Craig.

SOCIAL IMPACT

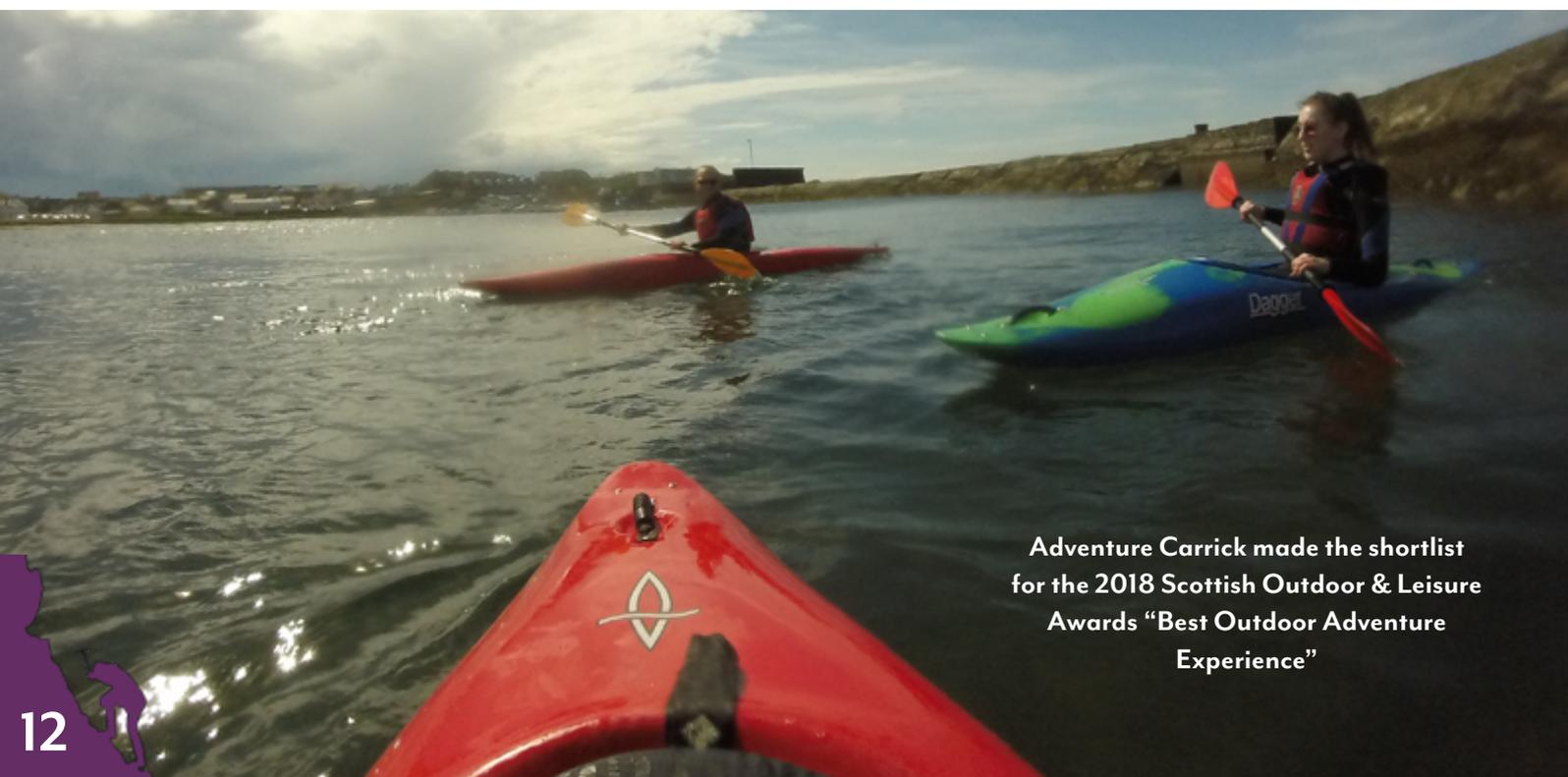
ACE and Adventure Carrick both provide a platform for the personal development of young people in the area through their apprenticeship schemes and trainee placements – moving them towards a career in outdoor physical activities.

The work they carry out with schools and community groups is also integral to developing a local sense of stewardship over the environment in Ayrshire, ensuring that sustainable practice is put into place to protect the area for future generations – an important part of their work with the UNESCO Biosphere.

On an individual basis, the holistic adventure packages that Adventure Carrick offer can better equip people to deal with stressful or challenging situations in their personal life: "It's about unwrapping how the brain and the mind works during an adventure activity, we want to understand what's going on when people are facing a challenge.

"It's about unpackaging for them and then relating that back to how does that fit into their everyday life.

"All the activities are about being immersed in nature and the healing benefits that can come around from being immersed in nature."



Adventure Carrick made the shortlist for the 2018 Scottish Outdoor & Leisure Awards "Best Outdoor Adventure Experience"

RESOURCES

Highlands and Islands Enterprise:	2015 - Adventure Tourism in Scotland Report 2017 - Outdoor Active Tourism Webinars
Robertson Trust, Sportscotland	2018 - Changing Lives Through Sport and Physical Activity
Scottish Government:	2018 - Tourism in Scotland: The Economic Contribution of the Sector 2018 - A More Active Scotland
Scottish Natural Heritage:	2017 - Valuing Nature Based Tourism in Scotland
Scottish Tourism Alliance:	2018 - Tourism in Scotland 2020 Overview 2017 - Digital Resource Centre
UN World Tourism Association	2014 - Global Report on Adventure Tourism
Visit Britain:	2013 - Regional Activities Report
Visit Scotland:	2018 - Scotland's Tourism Performance Summary Report 2017 2017 - Cycling Tourism in Scotland 2017 - Walking Tourism in Scotland 2017 - Wildlife Tourism in Scotland
Wild Scotland	2010 - Adventure Tourism in Scotland: Market Analysis Report

[Visit Scotland - This is Now Toolkit](#)

An online toolkit packed with digital resources to tell Scotland's stories to global audiences.

[Digital Tourism Scotland:](#)

Digital Tourism Scotland (DTS) is a £1.2 million programme to support tourism businesses to harness the power of digital.

DTS is a digital skills programme aimed at significantly at the tourism sector has been developed in response to the feedback from industry. Launched in December 2015, support, training and surgery sessions are now taking place across the country.

