



**ADVENTURE TOURISM
INNOVATION PARTNERSHIP PLAN
FOR SCOTLAND**

INTRODUCTION

This document outlines the objectives, activities and structure of the Adventure Tourism Innovation Partnerships in Scotland. The Partnership Plans form a strategic action plan that guides HE institutions, VET bodies, SMEs and wider stakeholders as to how to effectively implement flexible learning adventure tourism pathways in their region.

Adventure Tourism Innovation Partnerships have been developed in Scotland, Ireland, Bulgaria and Estonia as part of the Adventure Tourism Innovation Partnerships (AVIP) Erasmus+ project (www.adventuretourism.eu) Intellectual Output 1.

The overall aim of AVIP is to develop the digital marketing and product innovation skills of entrepreneurs, employees and students in the adventure tourism sector. The project is based on an awareness that the current higher education and training is failing to keep up with the rapidly changing consumer needs within the adventure tourism industry. Adventure tourism is one of the fastest growing segments of the tourism industry and has been recognized as a powerful tool to support growth.

The project commenced in September 2017 and is delivered by a partnership of six organisations from the UK, Ireland, Bulgaria, Estonia and Denmark.

AVIP brings together at least 60 high level representatives of all key stakeholder organisations, including Higher Education Institutions; VET institutions from the public, private and not-for-profit sector; local government authorities; and adventure tourism businesses to:

- Create 4 regional innovation partnerships that will assess learning gaps and learning objectives and make recommendations for flexible learning pathways;
- Develop, test and optimize new course curricula on digital marketing as well as new innovative products and services for the adventure tourism market;
- Promote collaboration and knowledge exchange through an open online training course.

A snapshot of the achievement of the overall deliverables of the project can be summarized as:

OBJECTIVE	ACHIEVEMENT
In each partner region, develop an understanding of a) the skills gap in terms of digital marketing and product innovation, and b) the flexible learning pathways that suit curriculum delivery to entrepreneurs, employees and students (Intellectual Output (IO) 1).	<i>The Scottish partners undertook their workshop and survey of businesses in January - February 2018.</i>
Create a suite of new modules on digital marketing (IO2).	<i>The Irish team has developed eight digital marketing modules. These have been reviewed by partners and changes made accordingly. The modules will be translated into Bulgarian and Estonian.</i>

<p>Create a suite of new modules on product innovation (IO3).</p>	<p><i>The Bulgarian team has developed eight digital marketing modules. These have been reviewed by partners and changes made accordingly. The modules will be translated into Bulgarian and Estonian.</i></p>
<p>Pilot test the new modules developed</p>	<p><i>Pilot testing has been carried out from January to the end of March 2019 with businesses and students online.</i></p>
<p>Create a new online learning platform to enable these open-access modules to be available to a wider audience (IO4).</p>	<p><i>Industry-specific information, including blog posts and virtual talks, has been uploaded by the partners to the knowledge exchange platform as well as well as the creation of a special interest Facebook group.</i></p>

1. SETTING THE SCENE: THE CONTEXT FOR ADVENTURE TOURISM PARTNERSHIPS IN SCOTLAND

1.1 Setting the Scene

The adventure tourism sector in Scotland has grown rapidly in recent years. In this sector there are a wide range of activities, many of which take advantage of the natural environment. Walking, climbing, biking, snow sports, nature watching, and river and marine activities are all prevalent. There is very little recent research on adventure tourism in Scotland. However, residents and businesses in Scotland, particularly in the Highlands have reported exponential growth and almost overwhelming numbers in the recent year.

More than a third of Scotland's adventure tourism businesses are located in the Highland area. There are around 300 experience and activity providers in Scotland, although this may not be an accurate representation of the true scope of the industry due to a lack of centralised data.

The most recent tourism numbers from Visit Scotland show that tourism in general in Scotland is continually increasing with 10 million trips and £4billion spend in the first 3 quarters of 2017.

If adventure tourism is to also include visits to a nature or wildlife park, there are high numbers of visitors attending both wildlife parks and more specific activities such as nature watching excursions with around 900,000 visits in 2015. As with other adventure tourism industries, these activities peak in the summer months and subside over the winter months. Northern and Western areas of Scotland have much higher numbers of visits to wildlife and bird watching than other areas of the country.

The adventure tourism sector in Scotland, and in particular the Highlands region is very much based on seasonal activities. Lochaber is home to Ben Nevis, the highest mountain in the UK and as such brings a great deal of hill walking and climbing during the more temperate summer months. In the Lochaber area alone there are a large number of adventure and guiding businesses. The area also hosts a number of large scale events such as the annual UCI Mountain Bike World Cup which attracts thousands of visitors. Outdoor activities, excluding snow sports, are significantly lower during the winter months and most areas have significantly less footfall. B&Bs in the Highland area see occupancy fluctuate between 20% in winter to over 80% in the summer months. There is however, a snow sports industry that brings visitors to particular areas of Scotland, such as the Highlands, during the winter months. However, the region does not have a guaranteed snow season in the same ways as established areas such as the Alps do, so numbers tend to fluctuate.

Adventure tourism businesses feature heavily in the marketing of Lochaber as the Outdoor Capital of the UK, with the majority of the last years' campaign videos featuring an adventure tourism business from the area. The Lochaber area is home to climbing, biking, walking, water sports, snow sports and an emerging slow adventure scene.

1.2 Adventure Tourism Lifelong Learning: Regional Strengths, Weaknesses, Opportunities and Threats

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Internal</p>	<p>STRENGTHS</p> <ul style="list-style-type: none"> – UK system of qualifications generally accepted and recognized in many countries, especially in Europe, and linked to other systems – UHI’s School of Adventure Studies (SOAS) has an existing relationship with many local SMEs – The Chamber of Commerce’s links to local SMEs, members and non-members – Buoyant adventure tourism SME ‘scene’ locally – Quite a high degree of SME interaction already – Student work placements arranged with SMEs 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> – Not a huge SME/educator link other than through freelancing instructors – Lack of market intelligence for informed business decision-making – Lack of a clear structure for access to CPD/education by SMEs – Lack of stand-alone modules for SME CPD – No formal qualifications needed to actually start or run an adventure tourism business – Access to much knowledge in the sector is informal or through ‘associations’ (eg. Association of Mountaineering Instructors)
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">External</p>	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> – AVIP-style stand-alone CPD modules – Governing bodies are starting to choose courses provided by academic partners as the highest level qualification – Potential enterprise company support for SME engagement – Ability to add a rigorous research base to new modules – Ability to add non-academic courses to the (academic) ‘Scottish Qualification Framework’ – Interaction with other suitable partners through similar initiatives – Current lack of affordable (or indeed any) CPD on operational aspects 	<p>THREATS</p> <ul style="list-style-type: none"> – Other CPD courses are already offered, so some product differentiation is required – Bigger, external threats, such as Brexit – Marketing quality needs to be improved to draw in greater numbers – Employing freelancers or franchising can lead to loss of control and possible quality issues – Many SMEs operate on a shoestring and therefore can’t afford training – Time constraints for training for much of the year – SME apathy – “why should we do it if we don’t <i>need</i> to do it?”

2. ENGAGING STAKEHOLDERS

2.1 Our target

In each partner area it is anticipated that the regional partnership will comprise a membership of 12-15 stakeholders – principally SMEs, but also other relevant bodies.

2.2 Stakeholder invitation process

Stakeholders for the project were identified through both UHI and LCC. UHI identified partners through their working relationships, such as through other projects. In addition to this, they attended 'Around Lochaber in 80 Tables', facilitated by LCC, and were able to make contact and collect details for a number of additional businesses who consented to being involved. LCC has a membership base of which there are a number of tourism businesses. As part of their membership, these businesses receive communications on Chamber activities and are regularly asked for their input. The contacts from UHI and LCC were combined and were sent the survey. As part of the survey process, respondents were able to specify if they did not want to be contact further and as such, those have been removed from the database.

2.3 Who is involved?

TYPE AND NUMBERS OF STAKEHOLDER	DESCRIPTION OF ACTIVITY
Education provider x 3	3 sent survey, 2 attended meeting
SME x 72	All sent survey, 3 attended meeting
DMO x 5	Sent survey
Government subsidiary x1	Sent survey
Tourist centre x 2	Sent survey
Transnational organisation x 1	Sent survey
National park group x 1	Sent survey
Local community trust x 1	Sent survey

2.4 How has this partnership developed?

ACTIVITY	DATE	DESCRIPTION
Survey sent	Nov 17	Gathering feedback
Partner meeting	Jan 18	Engagement, gathering feedback

3. ASSESSMENT OF REGIONAL SMES' LIFELONG LEARNING NEEDS

The Scotland survey analysis had 30 respondents from the adventure tourism sector and was conducted by both UHI and LCC.

Digital marketing skills

The responses illustrated that businesses already use websites and Facebook as a form of digital marketing in much greater numbers than other platforms. When self assessing their own digital marketing skills, businesses rated themselves as average or above average. They have a grasp of the basics of digital marketing but could improve their skills through specialised and targeted courses. In addition to this, the lack of spread throughout various platforms indicated that a greater awareness of the types and forms of digital marketing is needed.

When asked what skills they would be most interested in learning about, businesses showed an interest in SEO and sales marketing above others. This covers the most immediate needs of businesses with regards to gaining exposure and thus customers and revenue. In addition to these business skills, there was interest in location based software, possibly for the ability to use it to enhance the in the field experience that is already offered. Other digital technologies were not favoured, however, due to the need for additional technology and equipment. Here, there may have been a misunderstanding as many may have interpreted these options as an addition to their product offering or replacing the outdoor experience rather than simply a new tool to market the already existing experience. This may have caused a more negative rating and thus should be interpreted with consideration.

In addition to the skills put forward in the survey, respondents also expressed that video and website skills were an important skill to learn for digital marketing. During the meeting held, some noted that workshops that focused on basic and practical video creation and editing for social media have previously been well received and would likely be so in the future.

Businesses are interested in working on digital marketing that enhances the search and booking experience, bringing in more customers and maintaining the image of the business.

Product development skills

The responses illustrated that businesses are competent in their product development skills but are open to learning more.

When self-assessing their product development skills, the majority of businesses rated themselves as average or above average. The skills that respondents were most interested in learning more about were developing inspirational adventure tourism and access to finance. These responses suggest an interest in practical issues such as developing new products and finding funding to progress these. Skills such as research and business planning were also rated as desirable and suggest an interest from businesses around general business skills that would allow their business to run better and make more informed decisions.

The skills received varying rating across the 1 to 5 scale, but none were overwhelmingly rated as unfavourable. This suggests that most respondents would be willing to learn more about a range of business skills and delivering their passion for the industry through their products.

Methods of learning

The most desirable methods of learning were online and the occasional face-to-face class. The time commitment required for regular day or evening classes discouraged businesses from these methods of learning. Taking time away from a potential business day or investing time after a day of business would discourage businesses from attending classes of this sort. Online classes allow flexibility and easy access, especially important in more remote or rural areas. This allows businesses to work at their own pace, not restricted by timetables.

In addition to this, businesses were also very much in favour of hands-on, interactive classes located in the field or outdoors. Due to the nature of many adventure tourism businesses, applying learned skills to their particular environment would be beneficial. There was also a desire for one-off intensive classes that would only require one day of commitment to learn a larger amount of information. This form of in person learning was favoured, but only if the time commitment was shorter.

However, online learning would be a more practical way to learn the skills relating to digital technologies, as these would take place through the computer.

4. PROPOSED MODULES FOR DIGITAL TOURISM AND PRODUCT DEVELOPMENT

4.1 IO2 Modules

Eight modules were developed by the Irish project team. The modules were revised by project partners. The modules are listed below:

- 1. The Future Adventure Traveller**
- 2. Future Trends in Technology & Travel**
- 3. Digital Marketing Campaigns**
- 4. Customer First Marketing**
- 5. Adventure Tourism Website**
- 6. Digital Social Media Marketing**
- 7. Travel Apps, AR, VR, MR**
- 8. Immersive Digital Technologies**

4.2 IO3 Modules

Six modules were developed by the Bulgarian project team. The modules were revised by project partners. Case studies and links to good practices and various examples as well as templates for a Business Plan, Marketing Plan and Communication Plan were added. The modules are listed below:

- 1. Plan your adventure initiative**
- 2. Organise and implement your responsible initiatives**
- 3. Check and audit**
- 4. Corrective measures**
- 5. Developing a business plan**
- 6. Developing a marketing plan**

5. NEXT STEPS

5.1 Module development and pilot testing

Module Development

The work in IO1, outlined in this partnership plan, will lead directly to the development of 11 new modules to improve the capability of HE students and graduates, businesses and staff to deliver new digital marketing experiences (six new modules in IO2) and new innovative products and services (five new modules in IO3) to the adventure tourism market. This work will be undertaken over the period of months 6 – 15.

Pilot Testing

In months 15-17 there will be a far reaching pilot testing phase, which will involve the modules developed in IO2 and IO3 being tested by target groups so we can use the feedback and analysis to improve the modules before final launch. At least 60 professional teachers and trainers working in HE and VET organizations, and 300 HE students, VET students and entrepreneurs/SMEs will participate in the pilot testing.

5.2 Multiplier event

Five multiplier events will be held. This will serve as a national launch to ensure that the projects' intellectual outputs are promoted to as wide an audience as possible. Each partner will lead the event in their own country and UHI will carry out an international event, tapping into their extensive transnational networks. More than just a presentation of the project, each event will engage participants so as to enable participants to:

- a) secure stakeholder buy-in to the range of adventure tourism modules developed in the project, and
- b) generate commitments to teaching flexible learning pathways.

The events will be held in months 20-24.

5.3 Awareness raising

The project, and subsequent modules will be promoted both by UHI and LCC. LCC has access to a large number of adventure tourism businesses through their membership in the organisation. The project has a dedicated page on LCCs website, and will feature in news update posts and direct emails to the Chamber members. LCC will also post updates on Facebook and Twitter, directing awareness to the project. UHI also has social media channels that can be utilised to promote the project.

A workshop will be held for another Erasmus+ project, and promotional material relating to AVIP will be distributed and explained there. Flyers with the course modules will be distributed at West Highland College UHI to attract attention and will also be distributed at LCC events.

5.4 Open access resources

Our project is built around the premise that outputs and materials will be available on the dedicated project website which will be free to access and open to all and maintained for at least three years after project completion.

All outputs will be available in PDF format, but also as editable documents to aid transferability,

and there will be open access to all the intellectual outputs created by the project for the public, through the internet and/or other digital forms.