



# Market Report

A Snapshot of your Market Sector

## Adventure Tourism

### Cost of Doing Business Support

For information on **reducing the cost of running your business**, the [Find Business Support](#) website has links to advice, funding and regional support.

This pack has been designed to provide information on setting up a business in the **Adventure Tourism** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website ([www.bgateway.com/businessplan](http://www.bgateway.com/businessplan)), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **November 2022**. If you find the information contained in this document useful, tell us about it! Send us feedback [here](#); we will use your comments to help improve our service.

## What do I need to know about the Adventure Tourism market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ **27% of UK adults** were planning to book a domestic or overseas holiday in the three months following December 2021, slightly higher than the previous month but significantly lower than pre-pandemic levels (35% in December 2019). Group adventure holidays have a younger customer base on average than escorted tours but attract a broad age range of people with an ‘explorer’ mindset. All group touring **operators attract a significant proportion of solo travellers, but this is especially the case with adventure brands**, some of which report that solo travellers account for **up to half of customers**. (Mintel, *Touring and Adventure Holidays – UK 2022*, February 2022)
- ◆ In August 2022, **58% of UK adults said rising costs for holidays abroad would make them holiday more in the UK**. This share rises to 65% of 16–44-year-olds, 65% of those with an annual household income of £15,500-24,999 and 69% of parents of under-16s. (Mintel, *Domestic Tourism – UK 2022*, November 2022)
- ◆ In August 2022, **interest in visiting Scotland increased even further**, with three percentage points compared to August 2021. Figures from before COVID-19 show that the Southwest was the most visited region, with 11.5 million domestic holidays in 2019, while **Scotland and Wales ranked second and fourth, with 7.7 and 6.7 million domestic holidays respectively**. (Mintel, *Domestic Tourism – UK 2022*, November 2022)
- ◆ Scotland is a popular camping destination in the summer due to its rugged terrain and the opportunity to partake in adventure activities. Scotland accounts for **10.7%** of the UK’s caravan and camping site establishments. (IBISWorld, *Caravan and Camping Sites in the UK*, June 2022)
- ◆ Mintel’s research found that **36% of all family holidaymakers** saw freedom for their children to play outside and explore as an important holiday factor. Among parents with children under 12, this was seen as important by 50%, and rated as highly as R&R and sightseeing by this cohort. (Mintel, *Holiday Centres and Parks – UK 2022*, July 2022)
- ◆ The national organisation for the tourism industry is [Visit Scotland](#). Other industry bodies include [Visit Britain](#), [Wild Scotland](#) and the [Adventure Travel Trade Association](#).

## Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email [info@bgateway.com](mailto:info@bgateway.com).

- ◆ **Mintel – *Touring and Adventure Holidays – UK 2022 (February 2022)***: There is a strong appetite among potential travellers to pursue wildlife experiences on group touring holidays. Interest is high across age groups, ranging from 42% among those aged 16-24 to 53% among those aged 55-64. The supply of escorted touring and group adventure holidays is largely provided by tour operators – either those that specialise in this type of product, or more general tour operators that provide touring holidays alongside other types of holidays.
- ◆ **Mintel – *Domestic Tourism – UK 2022 (November 2022)***: 39% of those planning to take more holidays in the UK in the year following August 2022 want to do so to save money compared to travelling abroad, up from 23% in the previous year. Soaring inflation has made saving money the main reason to holiday more frequently in the UK. Just over half of travellers who are planning to visit Scotland in the year following October 2022 plan to take a city trip in the UK, suggesting that Scotland’s city product has high growth potential. Those who are planning to take a holiday to Scotland also show higher interest in taking a rural/countryside-based holiday, cultural/ historical sightseeing holiday, a coach tour, and an activity holiday.
- ◆ **Technavio – *Global Adventure Tourism Market 2022-2026 (September 2022)***: Europe is considered to be the largest market for adventure tourism across the globe owing to the growing disposable income and the presence of numerous exotic destinations. The market is expected to grow at a rapid pace over the forecast period. In countries such as the UK, Germany, and Switzerland, an increasing number of food festivals and a rising number of adventurous sports, such as kit surfing, hiking, and paragliding, attract many visitors.

There are also a number of online resources you may find helpful:

- ◆ **Visit Scotland – Research and Insights** ([tinyurl.com/3mfkxdn9](https://tinyurl.com/3mfkxdn9)). The latest industry and consumer insight on tourism in Scotland, including regional market research, information on types of visitors to Scotland and the activities that they participate in, and future market trends. Of particular interest might be their ‘Adaptable Adventures’ insight paper ([tinyurl.com/ym6rbjkh](https://tinyurl.com/ym6rbjkh)) which looks at the growing trends in adventure tourism
- ◆ **Office for National Statistics (ONS) – Tourism Industry Statistics** ([tinyurl.com/yc2rdvjz](https://tinyurl.com/yc2rdvjz)). There were 3.0 million visits to the UK by overseas visitors in June 2022; an increase from 2.8 million visits in May 2022. Visits by overseas visitors to the UK in June 2022 are still lower than pre-coronavirus (COVID-19) pandemic levels, down 19% from 3.7 million in June 2019.

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## How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#) ,[Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing [info@bgateway.com](mailto:info@bgateway.com) or by calling **0300 013 4753**



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## What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please [info@bgateway.com](mailto:info@bgateway.com) or by calling **0300 013 4753**.

## Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these website, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.

## How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

### Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

### Funding

[Practical information](#) on finance and funding for starting and growing your business

### Insurance

[Business insurance guide](#)

### Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

### Pricing

Business Companion [Pricing & payment guide](#).

**Please note:** the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

### Promotion

[BG guides to Marketing](#)

### Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

We hope you find this Market Report useful and we'd love to hear your feedback [here](#).

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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**Updated by: Fiona Elliot**

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