

Thursday 12 January 2012 – Morning

AS GCE APPLIED TRAVEL AND TOURISM

G720/01/CS Introducing Travel and Tourism

CASE STUDY

Duration: 2 hours



INFORMATION FOR CANDIDATES

- This is a clean copy of the Case Study which you should already have seen.
- You should refer to it when answering the examination questions which are printed in a separate booklet.
- You may **not** take your previous copy of the Case Study into the examination.
- You may **not** take notes into the examination.
- This document consists of **16** pages. Any blank pages are indicated.

INSTRUCTION TO EXAMS OFFICER/INVIGILATOR

- Do not send this Case Study for marking; it should be retained in the centre or recycled. Please contact OCR Copyright should you wish to re-use this document.

The following stimulus material has been adapted from published sources. It is correct at the time of publication and all statistics are taken directly from the published material.

Document 1



TOURISM IN SCOTLAND 2008



Introduction – Spending by Tourists in Scotland in 2008

In 2008, around 15 million tourists took overnight trips to Scotland. The annual spend was over £4.0 billion. Scottish Tourism contributes 11% of the Scottish service sector economy compared to 9% for the United Kingdom (UK) as a whole.

Fig. 1a UK Tourism 2008

	Trips 2008 (m)	Nights 2008 (m)	Spend 2008 (£m)
Scotland	5.84	19.19	927
England	5.74	23.14	1 682
Northern Ireland	0.36	1.16	127
Wales	0.21	0.70	76
Total UK Tourism	12.15	44.19	2 812
Total Overseas Tourism	2.48	19.34	1 235
Total	14.63	63.53	4 047

- The UK accounts for 83% of tourism trips to Scotland.
- Overseas tourism accounts for 17% of tourism trips to Scotland.
- 65% of overseas trips are taken in April-September.
- The European Union (EU) is our biggest overseas market with six of the top ten inbound markets sharing the single European Currency.
- The United States of America (USA) remains the biggest single national market with 21% of overseas spend.
- 75% of overseas visitors who come to Scotland arrive in the UK by air and 67% of UK visitors come by car.
- Overseas tourists stay an average of 7.8 nights, Scottish tourists an average of 3.3 nights and English tourists an average of 4.0 nights.
- Average spend per night is £64 for overseas tourists, £73 for English tourists and £48 for Scottish tourists.
- Scottish weather for 2008 recorded rainfall 14% higher than the 1971–2000 average and there was 9% higher rainfall than 2007.

Fig. 1b Volume and Value of Tourism in Scotland 2008

	Trips		Nights		Spend	
	(m)	(%)	(m)	(%)	(£m)	(%)
UK Tourists						
Holidays	8.29	68	33.54	76	1 986	71
Business	1.93	16	5.14	12	557	20
Visits to Friends and Relatives	1.60	13	4.16	9	208	7
Other	0.33	3	1.35	3	61	2
Total	12.15	100	44.19	100	2 812	100
Overseas Tourists						
Holidays	1.16	47	7.70	40	640	52
Business	0.39	16	1.78	9	166	13
Visits to Friends and Relatives	0.79	32	6.86	36	279	23
Study	0.03	1	1.63	8	52	4
Other	0.11	4	1.37	7	98	8
Total	2.48	100	19.34	100	1 235	100

Fig. 1c Top Origins of Overseas Tourists 2008

	Trips		Nights		Spend	
	('000)	(%)	(m)	(%)	(£m)	(%)
USA	340	14	2.75	14	260	21
Germany	257	10	1.77	9	93	8
Ireland	242	10	0.76	4	76	6
France	219	9	1.66	9	74	6
Netherlands	135	5	1.19	6	110	9
Canada	116	5	1.19	6	86	7
Poland	111	4	0.93	5	27	2
Italy	110	4	0.81	4	56	5
Spain	110	4	1.04	5	52	4
Australia	108	4	1.27	7	64	5
Rest of World	727	29	5.97	31	337	27
Total	2 475	100	19.34	100	1 235	100

Fig. 1d Average Length of Stay and Spend 2008

	Length of Stay (nights)	Spend per Trip (£)	Spend per Night (£)
Scottish	3.3	158.7	48.3
English	4.0	293.0	72.7
Rest of the UK	3.3	356.1	109.1
All UK	3.6	231.4	63.6
All Overseas	7.8	498.0	63.9
All	4.3	276.6	63.7

Fig. 1e Time of Visit 2008

	Jan–Mar (%)	Apr–Jun (%)	July–Sept (%)	Oct–Dec (%)
UK Holiday Trips	17	24	36	23
UK Business Trips	22	28	26	24
Total UK Trips	21	24	33	22
Overseas Holiday Trips	12	30	47	11
Overseas Business Trips	32	20	31	17
Total Overseas Trips	19	27	38	16

Fig. 1f Transport Used to Travel to Scotland 2008

	Total Trips (%)	Holiday Trips (%)
UK Tourists		
Car	67	67
Train	11	10
Coach Tour	3	4
Regular Bus/Coach	4	5
Air	11	10
Other	4	4
Overseas Tourists†		
Air	75	68
Sea and Tunnel	25	32

† Transport used to reach UK.

Fig. 1g Accommodation Used 2008

	UK Trips 2008 (%)	Overseas Trips (%)††
Hotel/Motel and Guest Houses	38	46
Friend's/Relative's House	35	29
Self Catering/Rented Accommodation	10	5
Bed and Breakfast (B&B)	6	12
Touring Caravan and Camping	6	2
Youth Hostel/School/University	2	5
Other	3	1

†† 2007 data.

Fig. 1h UK Tourism by Country of Origin and Purpose 2008

	Trips (%)		Nights (%)		Spend (%)	
	All	Holiday	All	Holiday	All	Holiday
England	47	47	52	52	60	59
Scotland	48	48	43	43	32	34
Northern Ireland	3	4	3	3	5	5
Wales	2	1	2	2	3	2

Document 1 cont.

Fig. 1i UK Visitor Activities Undertaken in Scotland†

	UK Holiday Trips (%)
Hiking/Hillwalking/Rambling/Other Walking	47
Heritage, Architecture, Literature, etc.	23
Shopping	14
Touring/Sightseeing	13
Wildlife Watching and Zoo Park Visits	9
Watching Performing Arts (Including Cinema)	8
Adventure Sports	4
Fishing	4
Golf	3
Cycling	3

† 3 year average 2006–2008.

Fig. 1j Visitor Attractions 2008

Major Attractions with Free Admission	Visits	Percentage Change (%)
		08/07
Kelvingrove Art Gallery and Museum, Glasgow	1 445 098	-35.3
The National Gallery Complex, Edinburgh	842 958	-10.3
World Famous Old Blacksmith's Shop Centre, Gretna Green†	665 688	-6.1
National Museum of Scotland, Edinburgh	614 894	-27.0
Gallery of Modern Art, Glasgow	562 595	-2.5
St Giles' Cathedral, Edinburgh	530 000	8.7
Royal Botanic Garden Edinburgh, Edinburgh	505 325	-16.8
Falkirk Wheel, Falkirk	500 829	-2.5
National War Museum, Edinburgh	474 133	1.3
Museum of Transport, Glasgow	456 324	-14.8
Major Attractions with Paid Admission		
Edinburgh Castle, Edinburgh	1 128 394	-8.2
Edinburgh Zoo, Edinburgh	661 763	8.9
Edinburgh Bus Tours, Edinburgh	517 793	2.6
Glasgow Science Centre, Glasgow	480 834	0.0
Stirling Castle, Stirling	375 344	-3.5
Scottish Parliament Visitor Centre, Edinburgh	323 722	-8.2
Our Dynamic Earth, Edinburgh	298 288	2.6
Burns National Heritage Park, Ayr	292 317	-18.1
Urquhart Castle, Drumnadrochit	270 097	-2.6
Royal Yacht Britannia, Edinburgh	255 806	0.1

† The World Famous Old Blacksmith's Shop Centre is a free attraction but has an important paid element.

Fig. 1k Tourism-related Employment 2006

	Tourism Employment '000	All Employment '000	Tourism as a % of All Employment
All Scotland	218.2	2 370.6	9.2

NB: The above employment figures exclude self-employed.

DEFINITIONS

'A tourist trip' is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes, except such activities as boarding education or semi-permanent employment.

'Tourist nights' are those spent away from home using any type of accommodation, or in transit, on a trip (as above).

'Tourist expenditure' is spending incurred while away from home on a tourist trip and on advance payments for such items as fares and accommodation. For overseas visitors the cost of travel to the UK is excluded. In this document expenditure is in 2008 prices.

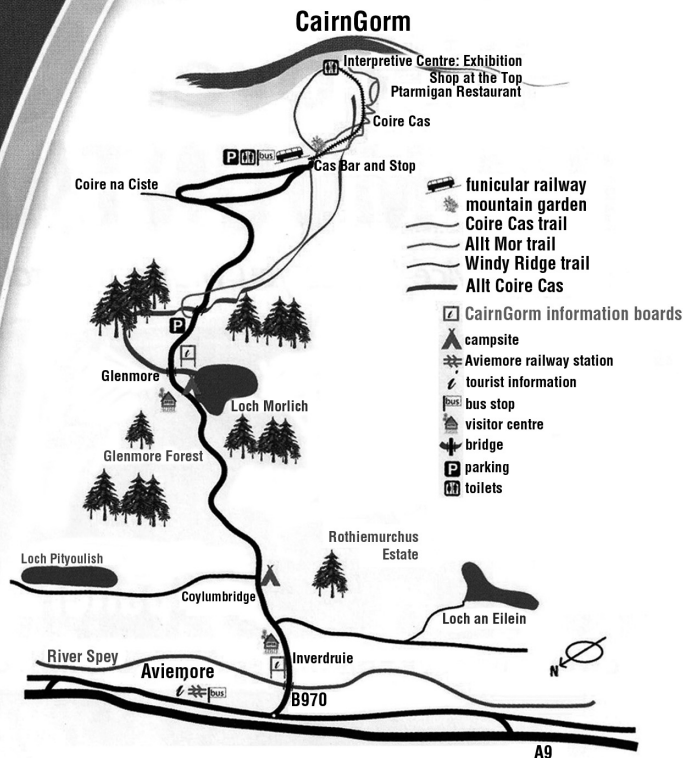
In this document percentage figures may not add up to 100% due to rounding and, as with all surveys, the data are subject to sampling errors which particularly affect the smaller regions of Scotland.

CAIRNGORM MOUNTAIN

'A wild environment where quality service leaves you with a natural high'

GETTING HERE

We support the local sustainable transport initiative.
Here's how you can help...



Weather permitting, we're OPEN all year round, except on Christmas Day. The funicular railway is closed for maintenance in November. If in doubt, call us on 01479 861261 or check www.cairngormmountain.org

CONSERVATION MANAGEMENT

The flora, fauna, soils and habitats of the Cairngorm plateau are very special and can easily be damaged by trampling. This area at the top of the mountain is protected under European Natura legislation. Cairngorm Mountain Limited operates a conservation plan which prohibits funicular railway passengers from leaving the Ptarmigan top station and viewing terrace to go onto the mountain when we are not skiing. Please help us to protect our natural heritage by adhering to this plan.

Visitors walking from the car park are free to enjoy the mountain using the network of footpaths and may enter the Ptarmigan building. A downhill train ticket can be purchased in the Shop at the Top. Walking up and taking the train down can be

accomplished comfortably in a morning or afternoon depending on weather conditions but suitable clothing and footwear are essential and more advice on this is available from the Ranger Base.



Cairngorm is wheelchair friendly, but wintry conditions can make things a little tricky! Call us if you're at all concerned. Only registered guide dogs are permitted to travel up on the train.

Cairngorm Mountain • Cairngorm Ski Area • Aviemore • PH22 1RB
Tel: +44(0) 1479 861261 • Fax: +44(0) 1479 861207
Email: info@cairngormmountain.org
Website: www.cairngormmountain.org

Bus

Low emission buses from Aviemore to Cairngorm run throughout the day, year round, with a 'hail and ride' system from Inverdrurie to the mountain. Download a 'Cairngorms Explorer' timetable from www.cairngorms.co.uk/park.

Car

If you do drive, we operate a voluntary £1 carbon donation per car to help us manage the mountain area more sustainably. From Aviemore (just off the A9) take the B970 and follow the signs to Cairngorm Mountain – it's about nine miles.

Foot

Get off the bus or park at Glenmore and walk up to Cairngorm using the Allt Mor trail. It's a delightful 2.5 mile moderate footpath that takes you up to the mountain railway base station in around 50 minutes.

Bike

If you cycle up to Cairngorm you'll be helping the environment and you'll receive a free one day train ticket!

Document 2a cont.

Our customers' own words:

What was the highlight of your visit and why?

geocaching
everything
value for money
reindeer
good cakes
in cas bar
hot choc
good trip
train
snow
weather
going down
very good
throwing snowballs at my kids
the tea
views from terrace
video
top of the mountain
funicular and hill walking
lovely
film
staff service
brilliant views
the cold weather
the staff were particularly good
the funicular journey
train journey
getting to summit
brilliant disabled facilities
good overall
getting my new hat
walking
bacon roll
exhibition chips
going home
watching the weather change through the Ptarmigan window
first snow of the year

OPENING TIMES AND FUNICULAR RAILWAY PRICES

ANNUAL 'FRIENDS' TICKET

Adult	£ 15.00
Junior (16 and under)	£ 10.00
Senior (65 and over)	£ 15.00
Student (ID required)	£ 15.00
Family (2+2)	£ 35.00
Family (1+2)	£ 30.00

Benefits include: unlimited funicular travel year round (not valid as a snowsports pass), free CairnGorm visitor guide, 10% discount in the CairnGorm shops, discount on additional tickets.

Prices valid until 30 November 2009

Listed here are our most popular types of tickets including return travel on the funicular to the Ptarmigan Station with entry to all of the facilities, including the mountain exhibition. Also listed is the one-way downhill only ticket.

Full price details, including snowsports ticket prices can be found at www.cairngormmountain.org or by calling 01479 861261.

Prices subject to increase on 1 December 2009.

Spring/Summer/Autumn:

Open daily at 10 am.
Trains run every 15 or 20 minutes daily.
Last train up 3.40 pm. Last train down 4.20 pm
(times may vary during peak holiday times).

1-DAY TICKET

Adult	£ 9.50
Junior (16 and under)	£ 6.00
Senior (65 and over)	£ 8.25
Student (ID required)	£ 8.25
Family (2+2)	£ 28.00
Family (1+2)	£ 19.50

Group discounts available.
Children 5 and under free.

DOWNHILL ONLY TICKET

Adult	£ 6.90
Junior (16 and under)	£ 4.40
Senior (65 and over)	£ 6.00
Student (ID required)	£ 6.00
Family (2+2)	£ 20.80
Family (1+2)	£ 14.50

Discover

CAIRNGORM MOUNTAIN

'A wild environment where quality service leaves you with a natural high'

Viewing Terrace and Visitor Guides

From this vantage point outside the Ptarmigan top station you can take in a spectacular mountain panorama. Our visitor guides are on hand there every day between May and October to answer your questions about the history, geology and lore of this place and how it changes through the seasons.

Walks and Trails

Enjoy a guided walk to the top of CairnGorm every Monday, Wednesday, Friday and Sunday in June, July and August from 10am until 2pm approx. Booking advisable. Adults £12, children £6. There is a full programme of guided walks available or explore on your own on one of the self-guided trails up or down the hill.

Climbing

The CairnGorm mountains offer some of Scotland's classic climbing routes. Leave your route cards at the Ranger Base. There are many specialist operators offering local climbing and guiding services who will open your eyes to this spectacular environment. And remember you can visit the Top Station and take the train back down.

Mountain Garden

Mountain wildlife is found in distinct zones from the valley floor to the summit and these zones have been recreated in the mountain garden. With minimal effort you can walk on paths through the garden from 'montane scrub' up through 'submontane' onto the 'summit' and discover some of our rare mountain plants.

Weather

The weather here is similar to that nearer the Arctic Circle. It influences not just the landscape but everything that grows, lives, works and plays here. The Gulf Stream keeps Scotland warmer than its latitude warrants and the weather here is extreme and changeable but never boring. Come and experience it for yourself.

Conservation

Much of the area surrounding the ski area is protected under the EU Birds and Habitats Directives and is home to many of Britain's rarest plant and animal species. Visitors are the most important tool in CairnGorm's conservation management plan – with their co-operation and positive action this rare landscape can survive and flourish.

Train

The UK's highest funicular railway takes visitors in comfort and safety on a spectacular 2 km journey from the car park to the Ptarmigan top station 1097 m (3598 ft) above sea level and just below the summit of CairnGorm – Britain's sixth highest mountain.

Birds

The CairnGorm Mountains are home to some of Britain's most famous bird life. Species such as the Ptarmigan, Snow Bunting and Dotterel are all resident or regular migratory visitors to the mountain slopes near the funicular railway. For birding enthusiasts, the access road provides an excellent starting point for viewing these iconic species.

Flowers

A northerly latitude, harsh climate and thin soils ensures CairnGorm Mountain provides a unique habitat for many arctic/alpine plant species not normally associated with the UK. Visitors are welcome to explore the plant life themselves on many of our self-guided trails, as part of a ranger guided walk or to see some of the species in our mountain garden.

THINGS TO SEE AND DO

- Marvel at the strength of this military stronghold and see the extent of its firepower
- See where Mary Queen of Scots gave birth to the future king of Scotland and England
- See the deep prisons where countless prisoners were held over the centuries
- Enjoy spectacular views from this defensive highground



Experience a live costumed performer



The One o'Clock Gun

HIGHLIGHTS – POWER & MAJESTY

- Originally built for James IV the **Great Hall** was where kings, queens, nobles and foreign ambassadors came to feast.
- Once used as a time signal for ships in the Port of Leith, the firing of the **One o'Clock Gun** by the army is among the castle's most popular traditions.
- The **Scottish National War Memorial** is where Scotland pays tribute to those who gave their lives in both world wars and in more recent conflicts.
- Edinburgh Castle hosts three military museums which tell the stories of the regiments and the 'bonny Scots fighters' involved in famous conflicts through the centuries.
- Among the many weapons on display is the impressive **Mons Meg**, a giant gun given to James II in 1457 – it weighs six tons and needed 100 men to haul it into battle.
- The big star is the castle rock itself, the remnants of a great volcano formed 340 million years ago which makes Edinburgh Castle such an impressive sight and such a formidable fortress.

ENJOY A VISIT

- A guided tour is included in your ticket.
- Audio guides in eight languages (for hire).
- Ask about our children's trail.

ACCESS

- Visitors who find the castle's steep inclines or steps difficult can take advantage of our courtesy vehicle.

GIFTS & REFRESHMENTS

- The castle's three gift shops sell a wide range of high quality gifts, books and souvenirs.
- The comfortable Red Coat Café and stylish Queen Anne Café offer two dining options.

AA Green Tourism Award
★★★★★
Opening times for independent museums may vary. Parking for disabled visitors only. Opening times and admission prices are correct at time of publication, but may be liable to change.

ENJOY ACCESS TO ALL HISTORIC SCOTLAND ATTRACTIONS WITH OUR EXPLORER PASS

On your visit ask us about this great value option.

www.historic-scotland.gov.uk/explorer



GENERAL INFORMATION

- In Edinburgh at the top of the Royal Mile, 15 minutes walk from Waverley Station and Princes Street.
- Postcode: EH1 2NG.
- **Open all year, seven days a week**
1 Apr - 30 Sep 9.30am to 6pm
1 Oct - 31 Mar 9.30am to 5pm
Last ticket sold 45 mins before closing. Closed Christmas Day and Boxing Day. Open New Year's Day.
- Tel: 0131 225 9846.

BOOK TICKETS IN ADVANCE

www.edinburghcastle.gov.uk

 Toilets
 History
 Restaurant/Cafe
 No dogs allowed

 Shop
 Reasonable Wheelchair Access
 Disabled Toilets





EDINBURGH CASTLE

Three thousand years as an almighty residence and stronghold. Experience Europe's most iconic castle – the defender of a nation.



EXPLORER PASS FROM £21

Fàilte Welcome to the Scottish Parliament

You are welcome to visit the Scottish Parliament to find out about what we do or to explore our building. Access to the building is free.



Shop

Selling a selection of gifts ranging from uniquely-branded souvenirs to Scottish jewellery and crafts, and a wide selection of books.

Café

Offering hot and cold drinks, baking, soup and sandwiches.

Crèche

Free facility for babies and children up to five years old. Baby changing/feeding facilities. Available Monday to Friday; pre-booking advised.

Exhibition

An illustrated guide to who's who and what's what in the Scottish Parliament for you to browse at your leisure.

Tickets to see Parliament in action

On business days, you can arrange to watch a committee or a full meeting of the Parliament. Booking in advance for gallery tickets is advised, and is essential for First Minister's Question Time and some debates.

Holyrood has been designed with disability access issues fully in mind. For more information about our access services or if you have any specific requirements, please contact us.

Planning your visit

Watch Parliament in action, or join a tour, depending on when you visit.

You can check our website to find out what will be happening at the Parliament when you intend to visit.

Guided tours

We offer a guided tours service, with professional tour guides. The public tours run regularly on non-business days (i.e. Saturdays; Mondays and Fridays when Parliament is sitting; all weekdays when Parliament is in recess).

This popular walking tour lasts one hour and takes you through the building and usually on to the floor of the Chamber to see where the MSPs meet to debate and decide on the issues that matter to the people of Scotland.

You are advised that the tour will involve long periods of standing and that stair climbing is required – please ask for details of available assistance.

Booking in advance is essential. There is a charge for the guided tours to cover the cost of the professional tour guides:

- Adults: £6.00 • Concessions: £3.60

Please ask for details of our group discount rates.

Document 4

Opening times:

Weekdays

Business days (normally Tuesday-Thursday)
All year 09.00 to 18.30

Non-business days (normally Mondays and Fridays and all weekdays when Parliament is in recess)
April to September 10.00 to 17.30
October to March 10.00 to 16.00

Saturday and public holidays

All year 11.00 to 17.30

Closed on Sunday

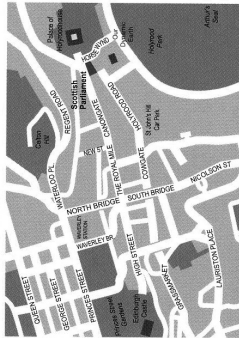
Last admission: 30 minutes before closing.

You can contact us or check our website for:

- ▶ current sitting weeks/recess dates;
- ▶ up-to-date information on days when we are closed;
- ▶ details of when our visitor services are changed due to our major events programme.

Please note that we are a working Parliament. All visit arrangements are subject to parliamentary business which may change at short notice.

How to find us



We advise visitors to use public transport to access the Scottish Parliament where possible. Lothian Buses 35 and 36 stop at Holyrood. We are a 15-minute walk from Edinburgh Waverley train station.

Details of local public transport can be obtained from



The nearest public car park is St John's Hill. Some parking spaces are reserved for disabled people on Horse Wynd. Coaches may drop off and pick up at Our Dynamic Earth – coach parking is at Regent Road.

For further information, please contact us before visiting on:
0131 348 5200 or 0800 092 7600;

07786 209 888 (text);

0131 558 7676 (textphone);

0131 348 5601 (fax);

sp.bookings@scottish.parliament.uk;

www.scottish.parliament.uk

2010 opening times and prices
 Open every day, except Christmas Day and New Year's Day.
 We suggest you allow up to 1½ hours for your tour. Please allow longer if you wish to visit our stunning new Royal Deck Tea Room.

2010 opening times	First admission	Last admission
January, February, March	10.00am	3.30pm
April, May, June, October	10.00am	4.00pm
July, August, September	9.30am	4.30pm
November, December	10.00am	3.30pm

If you are visiting in August, to avoid queuing to purchase tickets, you can buy them in advance by calling us on 0131 555 5566.

2010 prices (audio tour included)	
Adult	£10.50
Senior Citizen (aged 60+)	£9.00
Student (with ID)	£9.00
Child (aged 5-17)	£6.75
Family (2 adults and up to 3 children)	£31.00

giftaid it
 If you are a UK tax-payer, a Gift Aid donation will enable us to claim back from the Inland Revenue 28p for every £1 you give. We are very grateful for your support.

Ask about our Free Annual Pass!

Group visits
 'UK's Most Coach-Friendly Tourist Attraction 2009'
 A visit to Britannia is an ideal day out for groups. Special rates are offered to pre-booked groups of 15 or more. Please call us on 0131 555 8800 and let us help you to plan your day.
 Corporate entertaining
 'Most Excellent Dedicated Venue UK 2009' *Comde Nast, Johansens*
 Exclusive dinners and receptions can be hosted on board.
 Call our Events team on 0131 555 8800 and see how we can create the event of a lifetime for your company.

Preserving Britannia
 Britannia is cared for by The Royal Yacht Britannia Trust, a self-funding charity registered in Scotland (SC028070).



- Officially Scotland's best attraction
- Something for all ages to enjoy
- Royal Deck Tea Room
- Only 15 minutes from the city centre
- All weather experience
- Child-friendly and educational
- Free audio tour in 21 languages
- Make a day of it at Ocean Terminal
- Free parking
- Ask about FREE entry for a year!



The Britannia Tour

Our complimentary audio tour will help you to explore Britannia's five main decks. Choose from 21 languages and there is a Junior tour in English (ideal for under tens).

Original artefacts

Almost all the furniture and paintings in the State Apartments are on loan with kind permission of Her Majesty The Queen.



Britannia. She played host to some of the world's most famous people, but above all was home for the British Royal Family.

Now you are welcome on board, to experience this floating palace for yourself - discovering the heart and soul of a very special royal residence.



Discover Britannia

Britannia is a must-see attraction when you visit Edinburgh. Stroll around the decks, following in the footsteps of the Royal Family and their guests. Now you are free to see what they saw, to stand where they stood.

You'll receive a truly warm welcome at Britannia's captivating Visitor Centre in Ocean Terminal, then step on board this magnificent ship and enjoy a rare glimpse into the life of the Royal Family and the dedicated crew of Royal Yachtsmen.

"Britannia rules"

The Times

"Definitely not to be missed"

In Britain Magazine

"The icing on the cake when you visit Edinburgh"

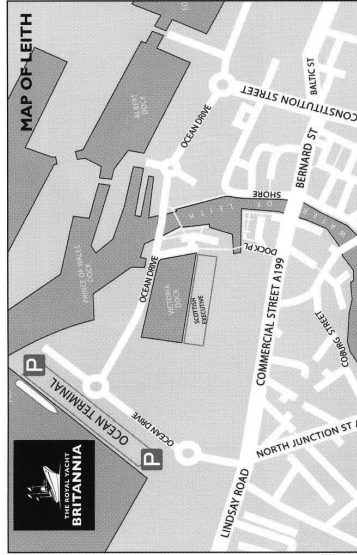
Les and Joyce, Pontypool

Ocean Terminal

Our Visitor Centre, shop and free parking are in Ocean Terminal, part of Edinburgh's waterfront. You will find a cinema and over 70 shops at Ocean Terminal. It is easy to make a day of your visit. www.oceanterminal.com

How to get here

Britannia is only 15 minutes from Edinburgh city centre. Our Visitor Centre is in Ocean Terminal on the second floor.



By bus: Majestic Tour Bus and Lothian Buses 1, 11, 22, 34 and 35 run from the city centre to Ocean Terminal.

By car: Follow brown Britannia signs and there is free parking at Ocean Terminal (blue car park level E is closest). For satnav our postcode is **EH6 6JJ**.

From City Centre: A900 Leith.

From Forth Road Bridge: A90 City Centre ▶ A902 Leith ▶ A901 Port of Leith.

From M8 (J1): A720 City Bypass North ▶ A8 City Centre ▶ A902 Leith ▶ A901 Port of Leith.

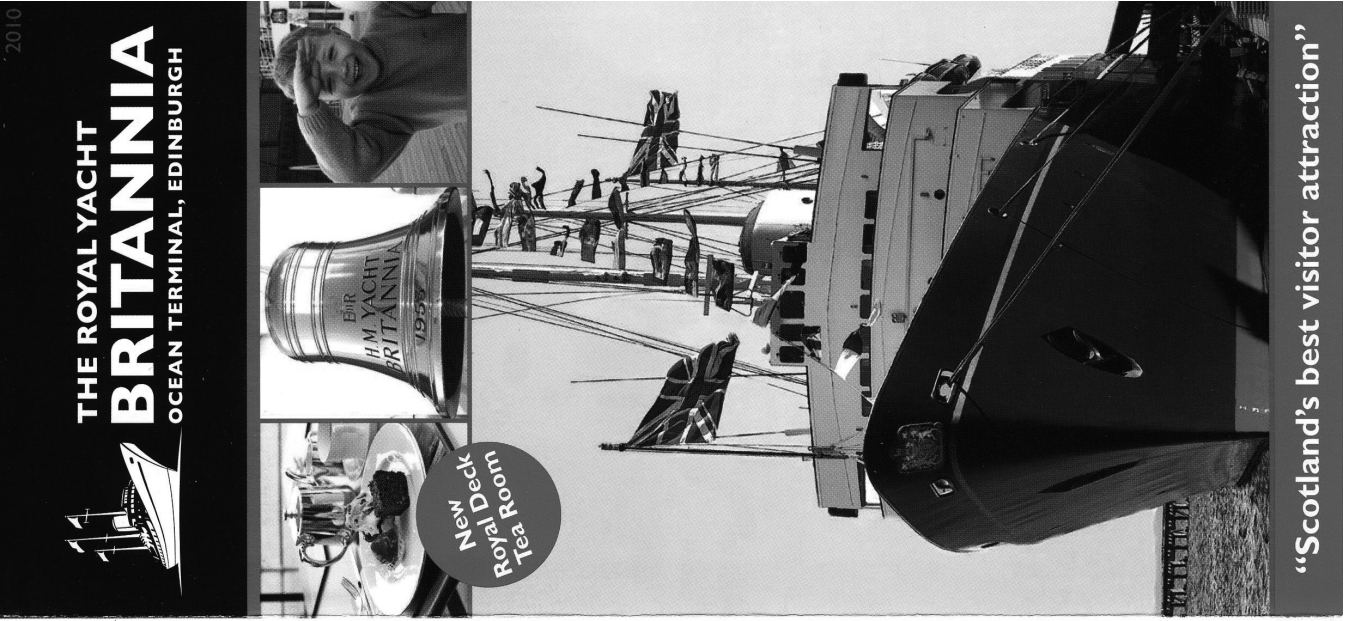
From A720 City Bypass: Follow A720 Leith ▶ Old Craighall Junction ▶ A1 Edinburgh ▶ A199 Leith.

From A1: Follow A1 Edinburgh ▶ A199 Leith.

Contact us

The Royal Yacht Britannia,
Ocean Terminal, Leith,
Edinburgh EH6 6JJ
0131 555 5566 (Mon-Fri)
enquiries@tryb.co.uk

www.royalyachtbritannia.co.uk



"Scotland's best visitor attraction"

Adventure sports research



Methodology

Online research with consumers from the VisitScotland Adventure Sports database, and contacts sourced from competitions (Mountain Bike World Cup/Adventure Online Games). Fieldwork took place in **April 2006** over a two-week period. Analysis is based on a sample of 855 respondents.



Future adventure sports breaks in Scotland

Consumers in the sample showed a **high short term interest** in Scottish adventure breaks or holidays: 60% stated that they are likely to take one within the next year. Over half of these respondents would consider booking an adventure package trip, and four-in-ten would consider using the services of an adventure sports business.

Consumer profile

Consumers with an interest in adventure sports on holidays or short breaks tend to be:

- **male** (62%);
- in the **younger age groups** (over two-thirds between 25–44).

Half of the sample was Scottish, the other half was from England.

A **third had children** under 15 living in their household. This confirms the attractiveness of adventure sports for the family audience (previous online research with different audiences shows this proportion to be lower).

Top 5 motivations to take part in adventure sports

- It's **fun** (79%).
- I enjoy the **scenery** while doing it (77%).
- It improves my **fitness** (73%).
- I enjoy the **challenge** (72%).
- It's a good **social activity** to enjoy with groups and friends (63%).



Adventure sports in Scotland

Consumers/visitors had in general a **high awareness of adventure sports opportunities in Scotland**: 84% stated that they thought they could take part in a wide range of adventure sports here. Over half of the respondents had already sampled an adventure sports break or holiday in Scotland before – 55% of these stated that it was their main reason to take this break. This suggests that adventure sports is increasingly becoming a main motivator for a Scottish holiday, and not only one element (or a part) of the holiday, as has traditionally tended to be the case.

Scottish breaks involving adventure sports **tend to be short breaks**, with an average of four nights spent away from home in Scotland, and tend to be taken in the shoulder months of April and September.

Holidaymakers who take part in adventure sports while in Scotland show **distinct differences in their holidaying behaviour compared to other holidaymakers in Scotland**. Whereas the usual travel companion on a Scottish holiday is the partner/spouse, adventure sports holidaymakers tend to travel in a group of friends (average party size of four). In contrast to other holidaymakers, who tend to prefer B&B and hotels or self catering, the sample shows a preference for camping.

Scotland fulfils and exceeds expectations for adventure holidaymakers. While two thirds said that their expectations of their adventure sports experience in Scotland were fulfilled, a third of respondents went even further and stated that this experience exceeded their expectations. A couple of quotes:

"It was beyond our wildest dreams, awesome ..."

"Real sense of freedom. We felt Scotland has embraced adventure sports with both hands and is making a real effort to cater for all types of adventure hols."

Marketing Opportunities and Campaigns in this market can also be viewed on www.visitscotland.org

Document 7

Adventure Tourism

Adventure and activity based holidays are showing significant growth within the tourism industry. The global product sees both established holiday destinations and new locations all looking towards 'extreme sports' as an attractor to bring in holidaymakers.

To date, VisitScotland.com has 119 adventure sport companies listed. The companies cover 47 activities ranging from skiing and hiking to sphaering and skydiving.

According to VisitScotland adventure tourism is split into two categories, 'incidental holiday activities' (e.g. canyoning, white water rafting, i.e. one-off-events) and 'short break holidays' (e.g. mountain biking, kayaking, climbing and surfing, i.e. events that are undertaken as the focus of the break).

History has shown us that Scotland has, for the past 200 years, been a playground for the outdoor sports person. In recent years Scotland has hosted several world events which have, in turn, promoted adventure sports. The Mountain Biking World Cup in Fort William and the Open Surf Championships at Thurso promoted Scotland's adventure tourism portfolio to a world stage. Both events attracted large crowds which, in turn, boosted accommodation figures, local businesses and raised the local sports profile.

When it comes to adventure tourism, the weather is actually seen as an attractor for some as it adds an additional element to enhance the overall experience. The weather is also essential for some sports, with the ski industry having a very loyal following. When snow falls on the slopes at Aviemore many winter sports enthusiasts will drop commitments at short notice to enjoy their sport.

Having an uncertainty to the weather does provide opportunities for suppliers and clothing retailers. The requirements for the provision of wet and dry, warm and cold weather equipment by visitors opens the possibility for impulse buying on site.

On balance, climate change could provide greater opportunities for adventure tourism in Scotland. With a changing climate, longer summer seasons or temperate winter seasons could extend tourism activity beyond normal parameters at present. As temperatures increase in Mediterranean countries, overseas visitors may look to Scotland as a welcome destination for outdoor activities and even enjoy the possibility of rain when they go hiking, mountain biking or dog-sledding.

Stag and hen groups and adventure tourism

One of the potential growth sectors for the adventure tourism market is from stag and hen groups. Due to various factors pre-nuptial celebrations are increasingly lasting longer than the traditional one night. The factors for this phenomenon include increasing personal disposable income, changing demographic of weddings (people are waiting longer before marrying) and the evolution of the tourism industry (namely the growth of the budget airline). Democratization of the tourism industry has made the short break more affordable and, as such, weekend stag and hen parties are rising in prominence.

Looking at the market in Scotland, a specialist company 'StagHenScotland.com' provides complete adventure tourism packages for the pre-nuptial market. The company works with local suppliers around the country to provide individual activities such as paintball, white-water rafting or canyoning. It provides budget to deluxe packages including accommodation, meals and activities starting from £99 through to tailored packages at a variety of locations from Edinburgh, Perthshire up to the Highlands. 'EdinburghStagParty.com' promotes a combination of activities from the traditional stag and hen events through to adventure activities such as rafting, cliff jumping or highland games.

Prospects for adventure tourism

Adventure tourism is expected to remain a niche market within the overall holiday market in Scotland. The popularity of the activities and the facilities are likely to increase over time as the sector is expected to continue to grow over the medium term. Consumer research has found that although 37% of people prefer a relaxing holiday, interest in activity breaks is increasing with 35% of respondents having already sampled adventure tourism and 50% interested in going in the future.

The advent of low cost airline carriers has its pro's and con's for Scottish tourism. The airlines provide a gateway for Scottish residents to fly to foreign destinations, but they also open up Scottish tourism to foreign visitors who want to sample the adventure tourism activities that are gaining a worldwide reputation.

In terms of market share, the domestic market will continue to dominate the adventure tourism market. However, with the multi-holiday culture found in the UK, the activity break in Scotland may decline in duration as it is seen more as a short break activity.

Increasing personal disposable income and a focus on healthy living are seen as drivers to growing the activity holiday market.

**Copyright Information**

OCR is committed to seeking permission to reproduce all third-party content that it uses in its assessment materials. OCR has attempted to identify and contact all copyright holders whose work is used in this paper. To avoid the issue of disclosure of answer-related information to candidates, all copyright acknowledgements are reproduced in the OCR Copyright Acknowledgements Booklet. This is produced for each series of examinations and is freely available to download from our public website (www.ocr.org.uk) after the live examination series.

If OCR has unwittingly failed to correctly acknowledge or clear any third-party content in this assessment material, OCR will be happy to correct its mistake at the earliest possible opportunity.

For queries or further information please contact the Copyright Team, First Floor, 9 Hills Road, Cambridge CB2 1GE.

OCR is part of the Cambridge Assessment Group; Cambridge Assessment is the brand name of University of Cambridge Local Examinations Syndicate (UCLES), which is itself a department of the University of Cambridge.